

Vision to Action

All Energy, May 2009

What should 2020 look like?

- Carbon intensity changed out of all recognition
- >15% of all UK energy from renewable sources
- North Sea oil and gas managed as a precious and long-term resource, not a current political squabble
- World's addiction to oil and gas being cured
- All households and businesses avoid wasting any energy

What might 2020 look like (on current trends)?

- UK at 5-7% of total energy from renewables
- CO2 targets for 2050 will look impossible
- UK remains 25th out of 27 in Europe
- CCS working – somewhere else
- Portugal's lead in marine energy - unassailable
- Some of today's windfarms still in planning
- Still consulting on smart metering
- Beaulieu Denny sets world record for delays in consenting infrastructure.
- Oil and gas by far the biggest source of global political tension and conflict

20 things to do by 2020

1. Maximise use of domestic energy resources
2. Wiser use of fossil fuels
3. Maximise good quality on-shore wind
4. Exploit off-shore wind
5. Use sustainable biomass
6. Decarbonise heat
7. Decarbonise transport
8. Energy storage at utility scale
9. Maximise hydro
10. CCS working at scale

11. New-build fossil and nuclear plant
12. Significantly reduced energy in built environment
13. Significantly improved transport efficiency
14. All consumers engaged in energy use and waste
15. Smart meter in every home
16. Ensure we can move the energy we need around
17. Marine energy at scale
18. Maximum energy from waste
19. Microgeneration for heat and electricity
20. Add to this list through new technology

8 things to do in 2008

- 1) Get long term investment climate right
- 2) Commit to smart metering regardless of roll out model
- 3) Enforce planning reforms throughout the public sector
- 4) Get networks moving
- 5) Deliver heat and transport incentives
- 6) Agree a 2020 renewables plan
- 7) Get cracking on CCS and marine
- 8) Get R and D moving

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What are we 'delivering'?

- 6 Energy Ministers and 5 Secretary of States in the last 5 years
- 33 UK Government consultations since last May
- Ca 200 Ofgem consultations since last May
- Proposals to change the RO banding 3 weeks after they are introduced
- 3-4 years talking about smart meters
- 4 years talking about grid access (still going)
- 3 years talking about CCS (still going)

What is getting in the way?

- We're not moving towards the vision because we keep talking about it

Real Delivery

- Glendoe commissioned on time and budget
- Greater Gabbard offshore windfarm in construction
- Clyde onshore wind about to start
- >£40m contributed to 24 new ventures
- >£4bn committed for investment in generation over next 5 years

- Feed in Tariffs
- Scrappage scheme

Focus on delivery

- £0.5 – £1 bn investment in supply measures
- 100,000 whole house treatments each month
- Training [x] design engineers and [y] installers
- £1bn investment in generation per month
- 1,000 wind turbines per year
- ENSG
- Pilots not trials
- Economic and employment benefit for UK

Summary

- Halve the talk
- Double the delivery