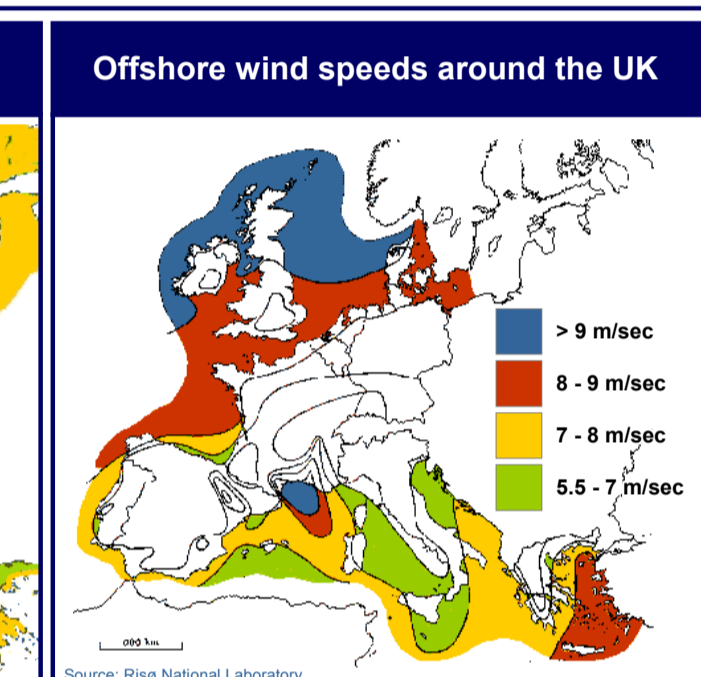
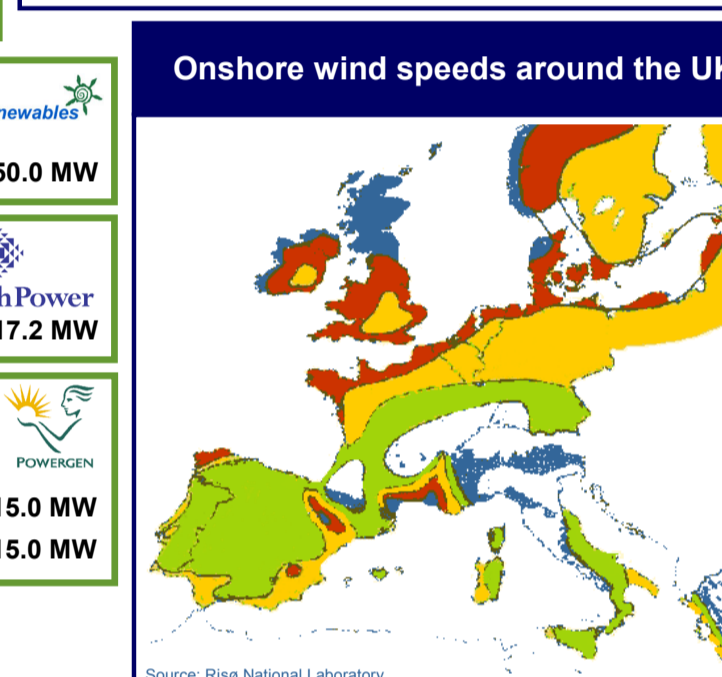
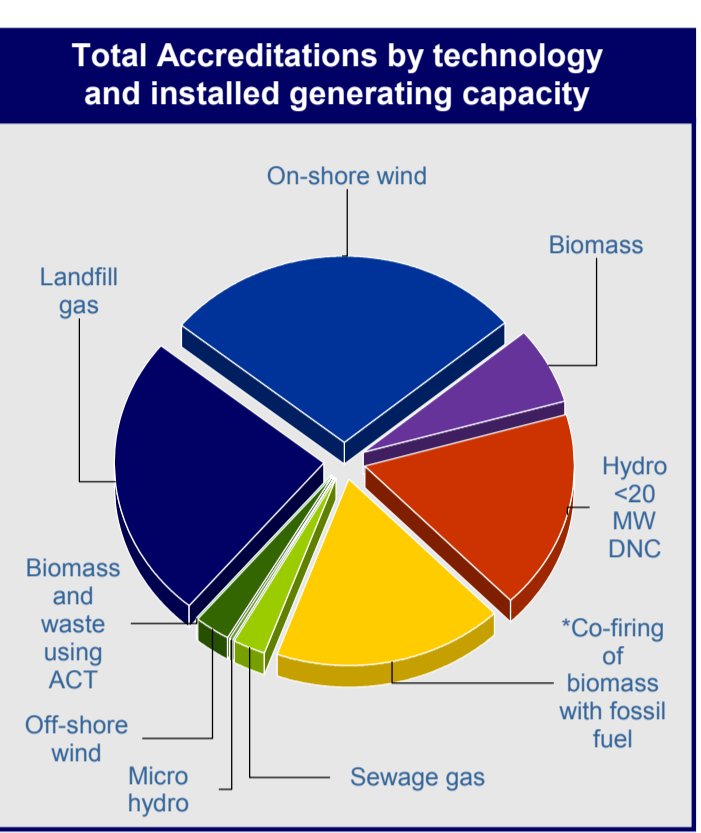
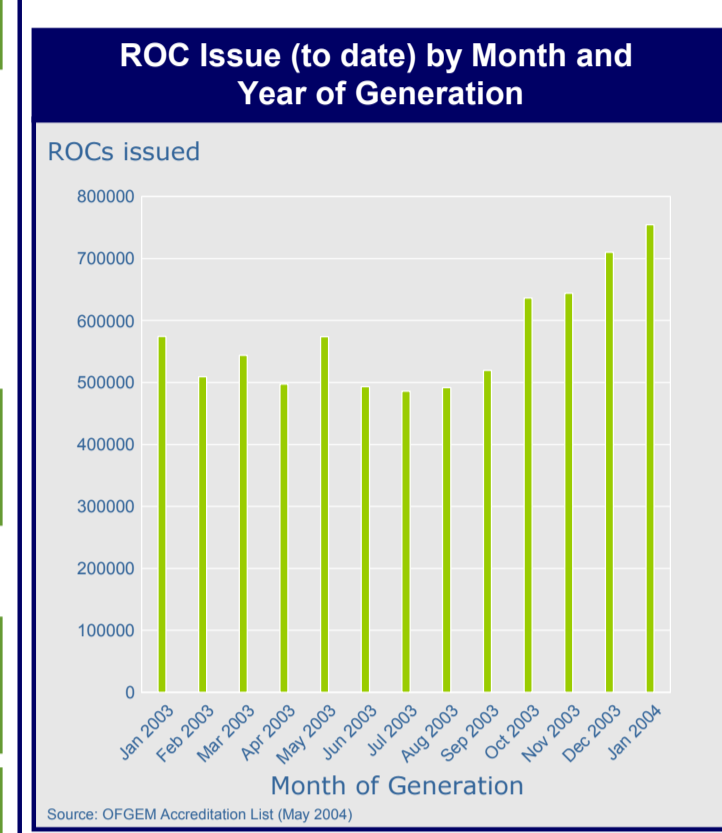
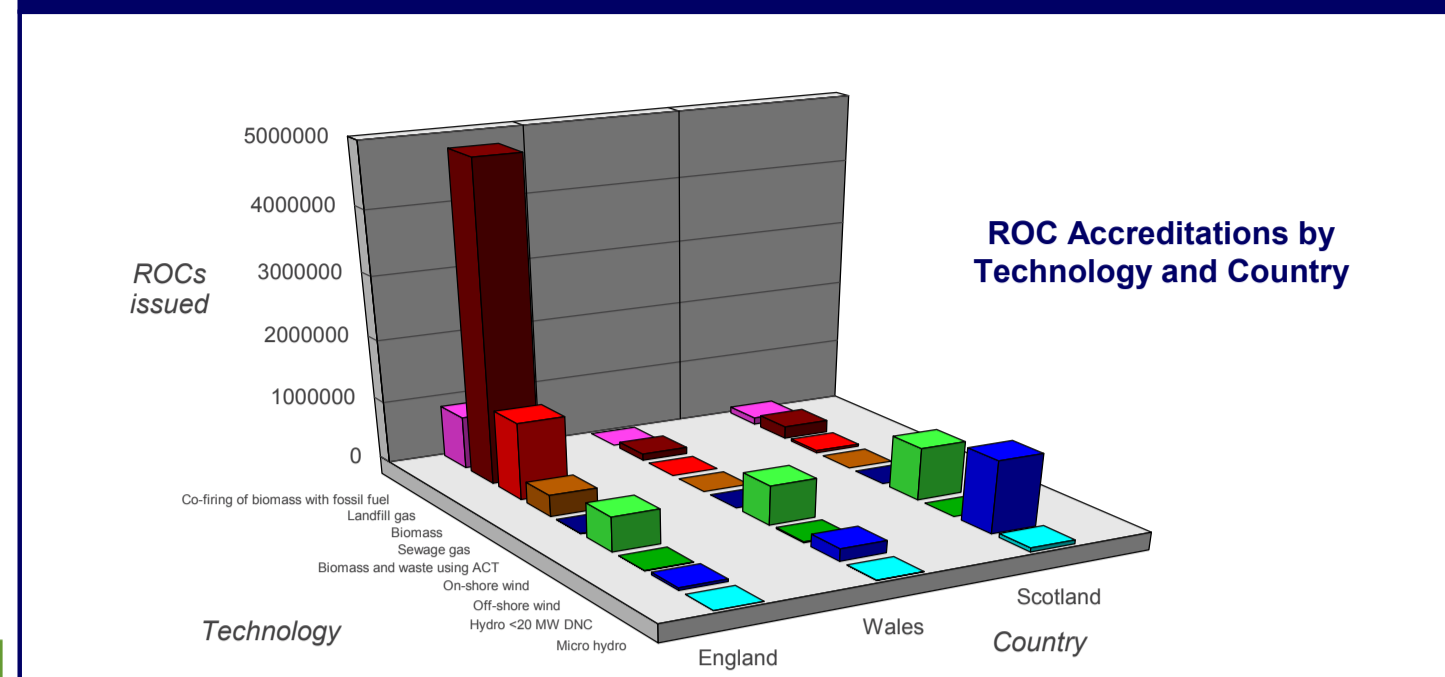


### The UK Renewable Industry in 2004



### Offshore Windfarms - recent developments

In November 2003, the UK's first commercial offshore windfarm, North Hoyle, off the north coast of Wales at Rhyl was commissioned, heralding the establishment of a new marine industry in UK territorial waters.

This 30 turbine development with an installed capacity of 60MW provides electricity to 50,000 homes and is the first of many major developments which will bring the UK closer to meeting the government's commitment to renewable energy sources.

North Hoyle is one of 18 projects around the UK forming the first round of offshore windfarm development announced in 2000-1. To date 12 projects have gained all the necessary statutory consents to enable construction and operation.

Expectations for 2004 are high with another development at Scroby Sands off Great Yarmouth already well under way, and indications are that construction will also start this year at 2 more sites off the east coast - Kentish Flats and Gunfleet Sands.

As the industry gathers momentum and confidence 2005 should see a significant build out of Round One sites, together contributing up to 1.4 GW.

#### Legend

Scale: 1 : 1 360 000 Projection: British National Grid Datum: OSGB36

**Accredited power stations (by fuel type)**

- Biomass
- Biomass & waste using an advanced conversion
- Hydro < 20 MW
- Micro Hydro
- Landfill gas
- Sewage gas
- Off-shore wind
- On-shore wind

**Substations**

- 220kV - 299kV
- 380kV - 400kV

**Electricity wires**

- Below 220kV
- 220kV - 299kV
- 380kV - 499kV
- Electricity Distribution zone

**Offshore Windfarms**

- Round 1 offshore windfarm sites
- Round 2 offshore windfarm sites
- DTI Exclusion Zone
- SEA Strategic Area
- 12 mile zone

N.B. Accredited power stations with > 10 MW capacity are labelled in boxes (excluding co-fired plants). Taken from OFGEM May 2004 accreditation list. © 2004 Deloitte & Touche LLP. All rights reserved.