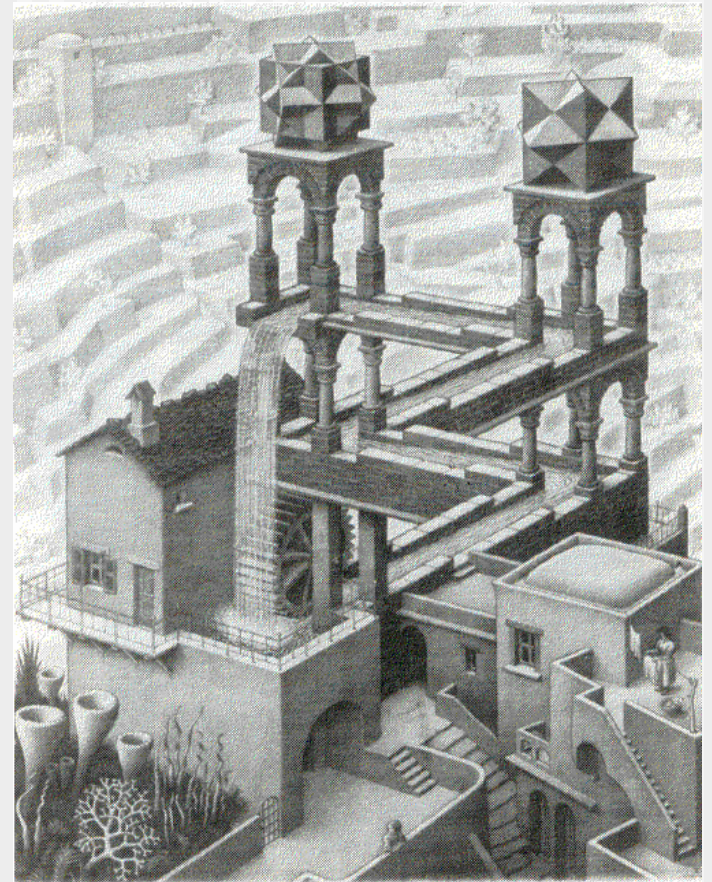


What drives Technology uptake?

- Availability of Technology
- Economics and market structure
- Government Policy
- Public acceptance



Renewable Energy

- Policy context and technology
- Public attitude
 - Wind in Denmark and Germany
 - Solar in California
 - Biomass in Austria
 - UK and 'Pelamis'?



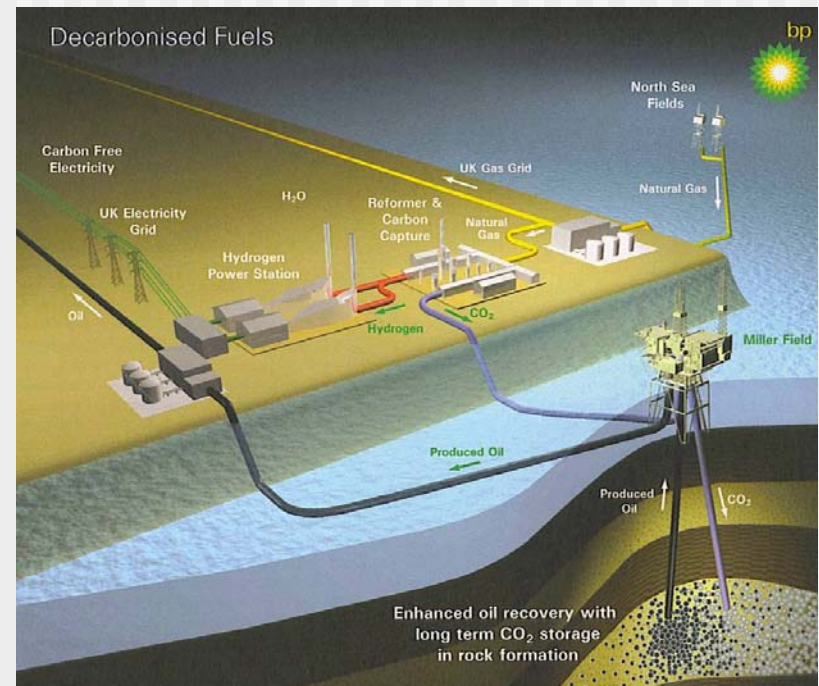
The 'Dash for Gas in UK'

- Major market structure change
- Economics and risk
 - Contract structure
 - Competition
 - Price
- Technology development (Frame 9, cooling etc.)



Carbon Capture and Clean Coal

- Bringing new technologies to market
- US
 - FutureGen and Hydrogen
 - IGCC and Regulation structure
- Norway
 - Gas with carbon capture
 - Carbon Tax and Regulation



Is UK Energy Policy working?

- Technological opportunities?
- Renewable potential?
- Clean coal and CCS
- SMART metering and microgeneration
- Fit with market?
- Public acceptance?



Conclusions

- Policy certainty
- Balance of Markets and Regulation
- Capital support v revenue?
- Public support?

