

BUILDING A NEW ALL-ENERGY INDUSTRY

Morag McCorkindale
Chief Operating Officer

7th October 2009

ABERDEEN CITY & SHIRE



- Global energy capital
- Massive industry presence
- Proven track record in energy industry development and diversification
- Globally networked city
- Synergies – oil and gas and renewables

THREAT & OPPORTUNITY



Threat:

- Loss of 10,000 - 15,000 jobs from employment base of 40,000

Opportunity:

- Global (all renewables)
- Europe (offshore wind)
- UK offshore: multi- billion pound market
- 16,000 jobs in Scotland alone

THE PLAN



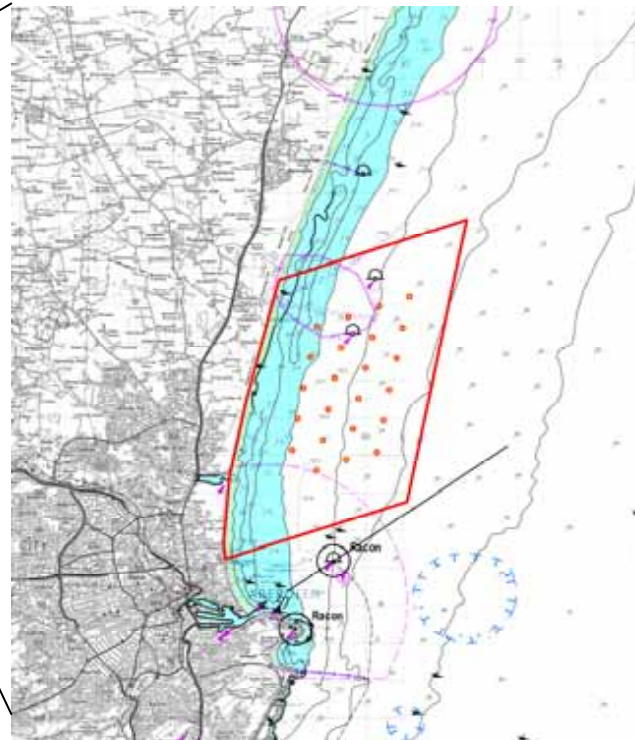
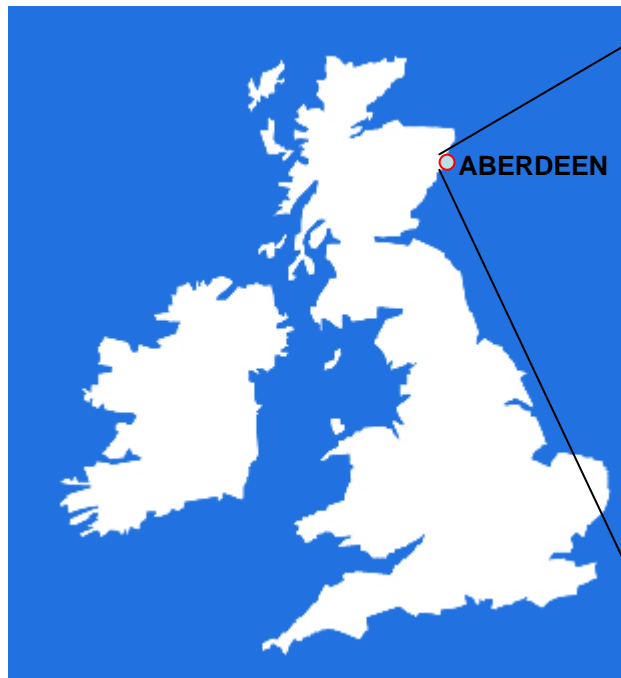
- Energy capital
- Industry leadership
- Build on existing capacity

AREG



- Private company
- 120 associate members
- Strength in diversity
- World leading collective energy expertise
- Focused action plan
- Committed to collaboration

EUROPEAN OFFSHORE WIND DEPLOYMENT CENTRE



Precise layout to be confirmed following formal consultation and in advance of presenting the Environmental Impact Assessment as part of the permit process.

INDICATIVE ONLY

EUROPEAN OFFSHORE WIND DEPLOYMENT CENTRE



- National asset
- Strong interest from industry
- Considered for 40 million euro EU investment
- New turbines, foundations, construction
- Training, commercial & academic 'lab space'
- O&M trials & training, control & response centre, logistics hub

ENERGY FUTURES CENTRE

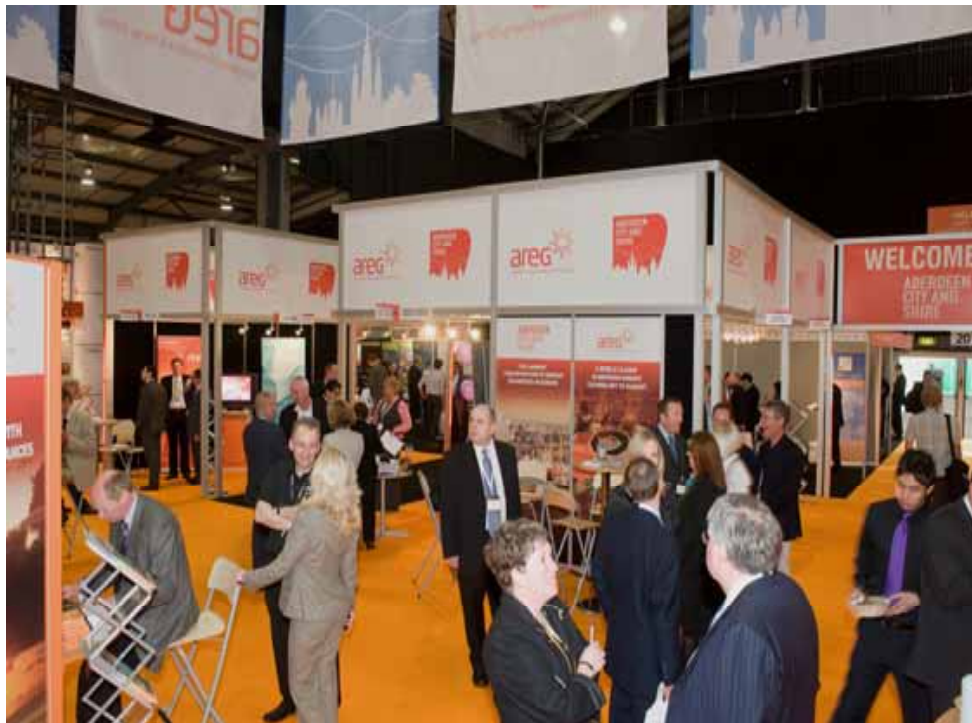


RENEWABLES RESEARCH CENTRE



- Developing leading research base
- New technology/ commercial opportunities
- Joint research in renewable/ clean energy technologies
- SEGEC
- Research funding proposals
- Member of ETP

ALL-ENERGY ABERDEEN



2009 Show:

- 5,500 delegates from 60 countries (+17% on 2008)
- 380+ exhibitors from 14 countries

INTERNATIONAL TRADE



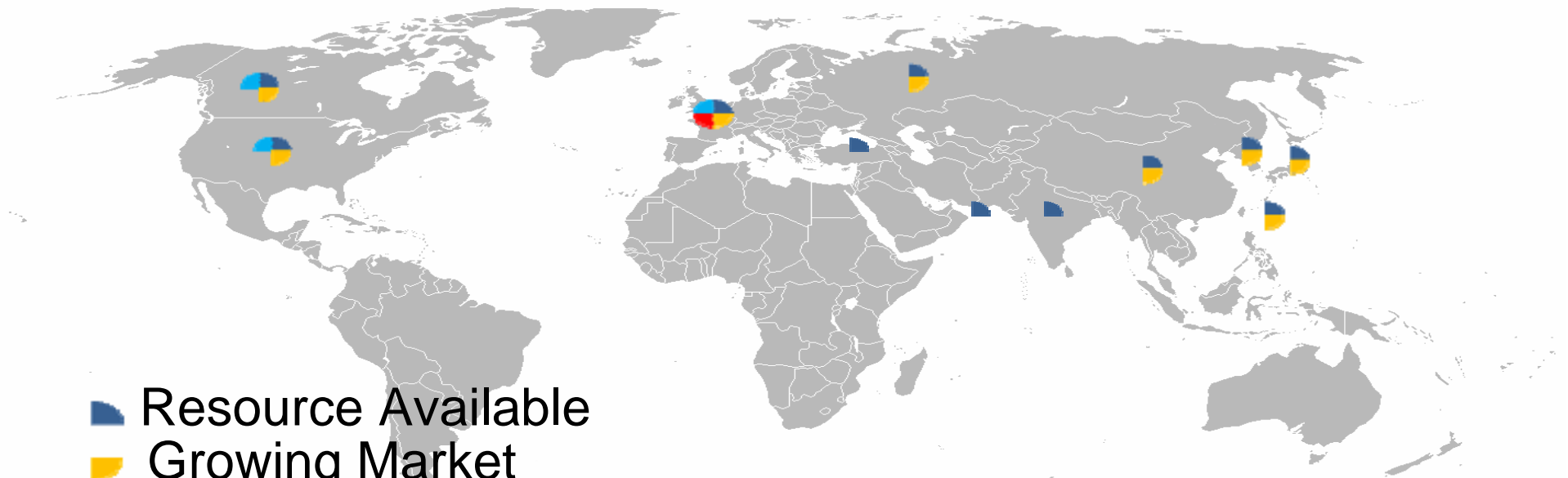
Key markets:

- USA
- Canada
- China
- Japan
- Korea

Programme:

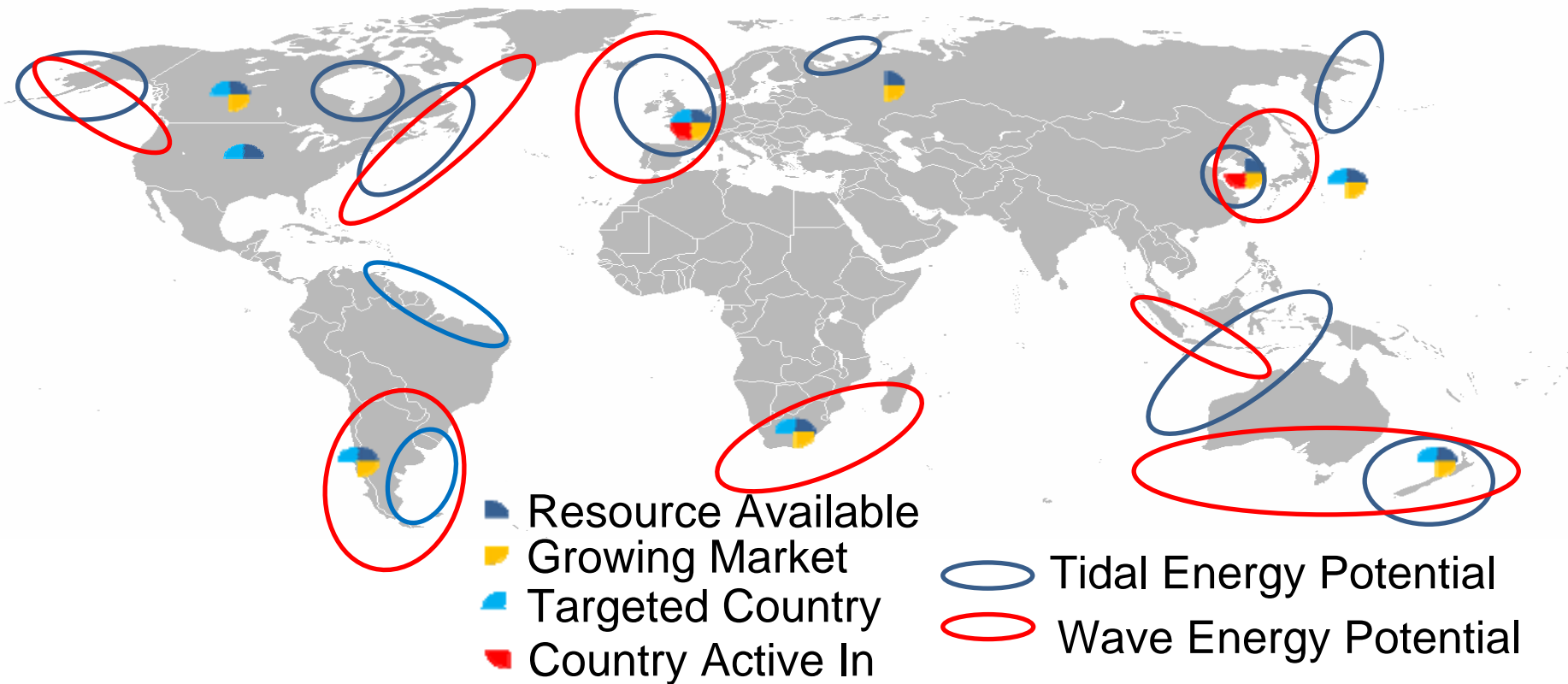
- Briefing notes
- Learning journey
- Inward & outward missions
- Events & shows
- Local prospectus

OFFSHORE WIND



- Resource Available
- Growing Market
- Targeted Country
- Country Active In

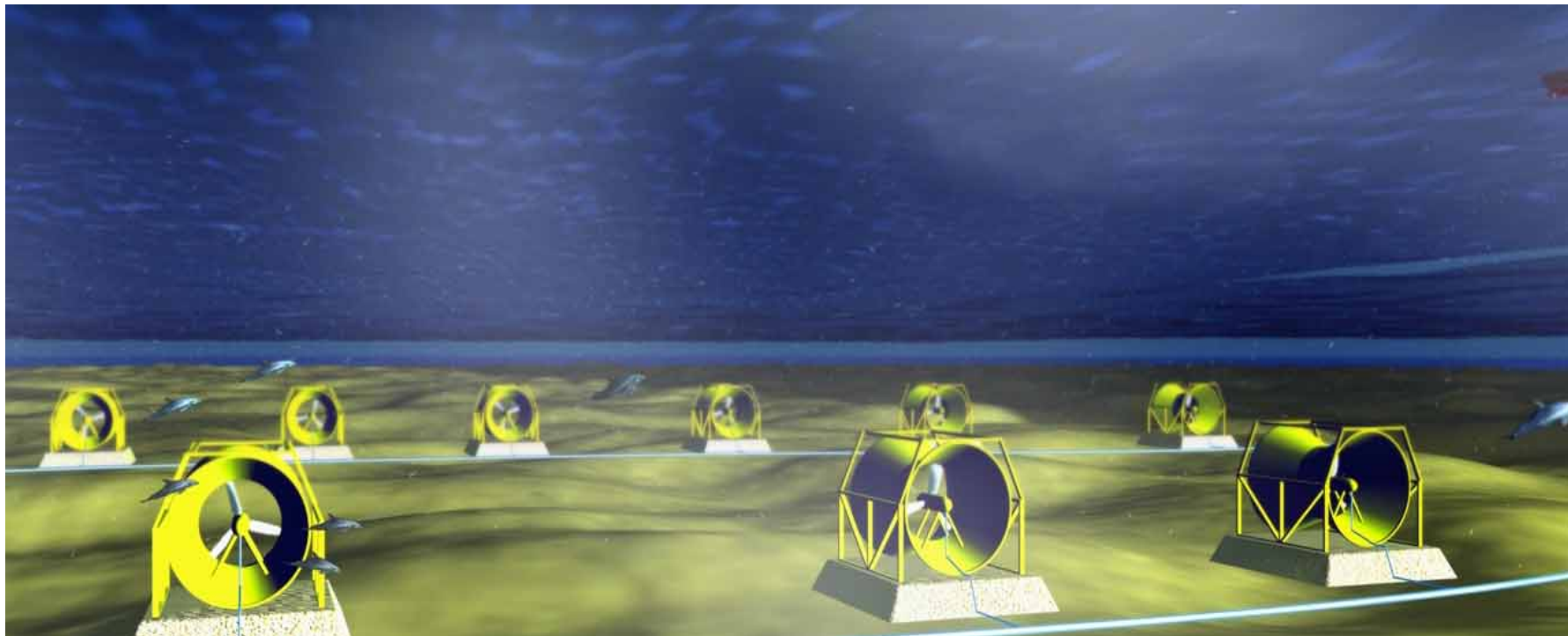
WAVE AND TIDAL



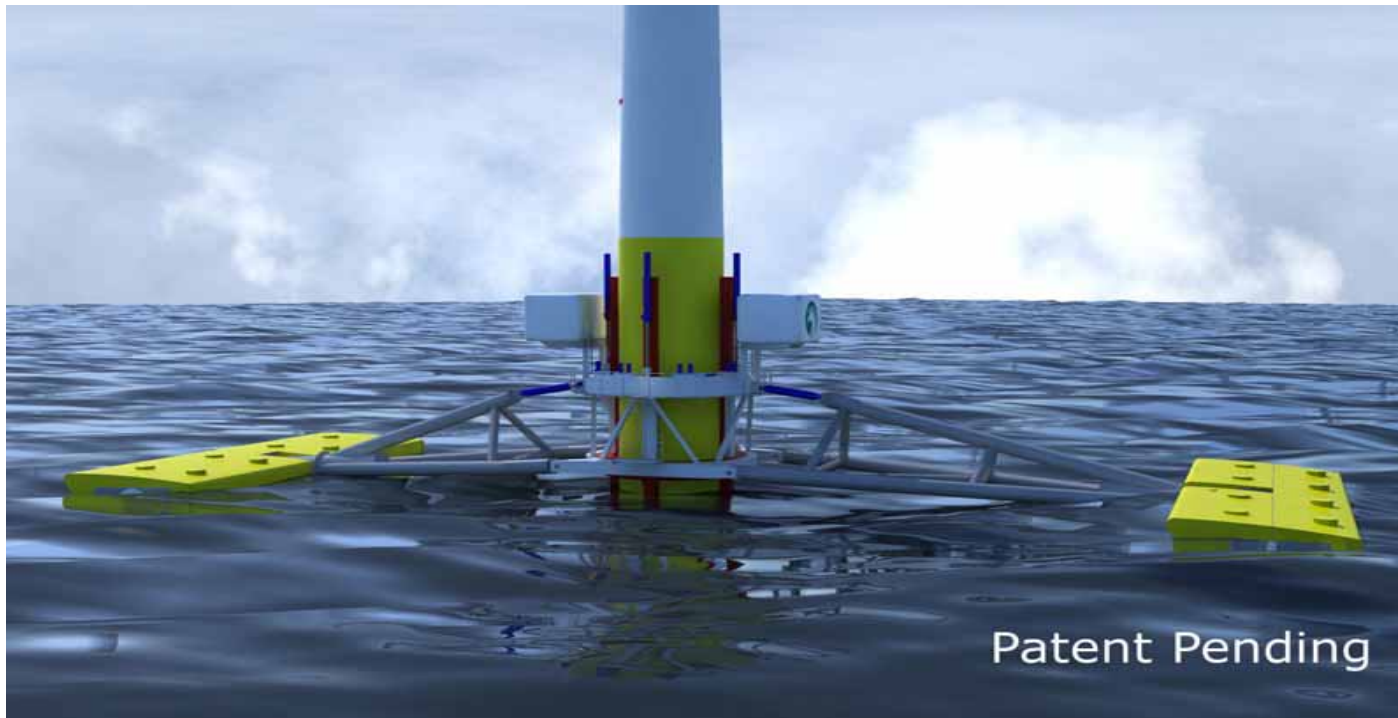
TALISMAN - BEATRICE



ROTECH TIDAL TURBINES



GREEN OCEAN ENERGY



Patent Pending

SUBOCEAN GROUP



OFFSHORE SKILLS BASE



- Environmental, engineering, technical, commercial, legal and risk assessment diligence and services
- Engineering design, prototyping, fabrication, certification
- Modelling, project design, commissioning, installation, management
- Vessels, access, offshore services, anchoring
- Cable laying, trenching, moorings, electrical control systems, interconnectors

OFFSHORE SKILLS BASE



- Inspection, instrumentation, condition and performance monitoring
- Logistics, operation, maintenance, emergency response
- Standards, training, health & safety
- Geotechnical, geophysical, oceanography, meteorology

TRANSFER OF SKILLS



- Proven track record in energy industry development and diversification
- Globally networked city
- Synergies – oil & gas and renewables
- Joint venturing and partnering

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MMcCorkindale@aberdeencity.gov.uk

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