

FOCUS ON PUBLIC OPINION

A Summary of Opinion Surveys on Wind Power

This *Wind Directions* survey of opinion polls brings together some of the main results of recent years. Surveys are of a variable quality and content, and a uniform methodological analysis is difficult to apply. Even so, this snapshot still provides some valuable data and trends. For Europe, the Eurobarometer survey conducted recently across the EU 15 represents the most comprehensive analysis to date.

Opinions Across Europe

"Energy; Issues, Options and Technologies" is the most recent Eurobarometer public opinion survey conducted by the European Commission's Opinion Research Group, commissioned by DG-Research. Over 16,000 people were interviewed across the EU-15 during February-April 2002. The aim was to "to obtain a clearer picture of public opinion on energy-related issues, including their scientific, technological aspects and prospects for the future". The detailed results for each country provide the best summary of national

attitudes where no additional data is widely available, or has been commissioned.

What emerges most clearly from the survey is the consistently high level of support for renewables across a range of parameters and issues.

Nearly nine out of ten respondents consider "global warming and climate change to be serious issues which need immediate action". Three quarters

believe that fossil fuels contribute significantly to climate change, and the same proportion believe transport is largely responsible. And almost half believe that nuclear energy contributes significantly to climate change. There is considerable confusion and lack of understanding about nuclear fusion, despite prompting with information about that topic. There is a huge demand for action on safety for nuclear power stations. Nine out of ten believe that energy use is increasing in their country, and eight out of ten believe the same for the EU overall.

**"EUROPEANS THUS GIVE HIGH PRIORITY TO
RENEWABLE ENERGY SOURCES..."
(EUROBAROMETER, MARCH 2003)**

A group of visitors at a traditional mountain shelter specially restored by Spanish developer EHN at the company's Alaiz wind farm in Navarre.



Photo: EHN

On security of energy supply, when prompted that the current level of 50% EU imports will increase, a third of those questioned considered that dependency on outside sources of energy was an urgent issue for the EU. At the same time, half agreed that more energy sources should be developed within the Union itself, and a quarter believe that energy imports of fossil fuels and uranium should be reduced.

When asked from a list what those questioned would like to know more about, the leading responses were save energy at home (53%), how to use renewables at home (42%), alternatives to petrol and diesel in cars (39%) and the safety of nuclear power and waste (36%).

Nearly nine out of ten respondents were not aware of EU energy related research and development, and the only R&D areas in which respondents showed any knowledge were renewables and cleaner means of transport, an indication of their interest in these areas.

Respondents were asked what they thought should be the two main priorities for government. 72% replied "protection of the environment and public health" as well as safety, low prices for consumers (62%) and an uninterrupted energy supply (30%).

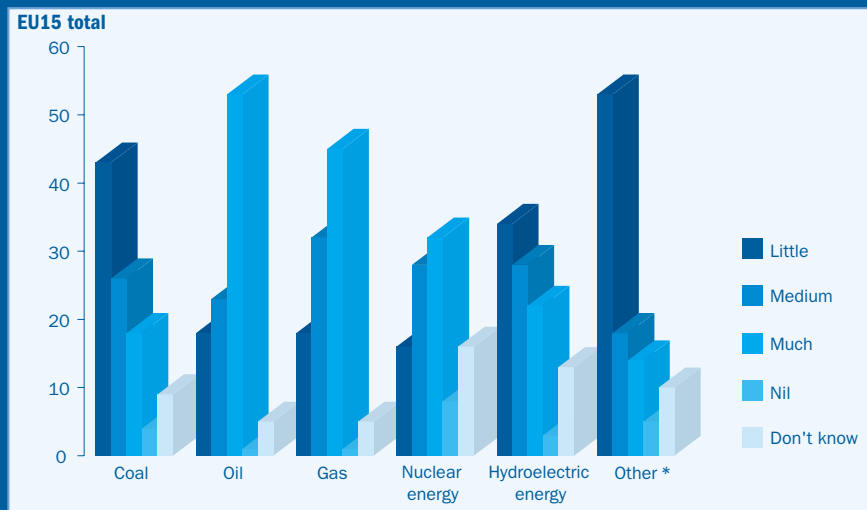
Respondents were asked for the year 2050 what energy resources would be

the least expensive. 40% said renewables, followed by hydroelectric (24%), natural gas (21%), with oil at 7%. Renewables was also the first choice (27%) among energy sources considered likely to provide the greatest "amount of useful energy". Future energy options are "clearly influenced by their own instinctive preferences for renewable energy sources", the survey comments.

Denmark, Netherlands and Sweden place the most faith in renewables. Also for 2050, 67% believe renewables to be best for the environment, compared to 2% for oil and 3% for nuclear fission.

Photo: Eotricity

To what extent is each of the following used to produce energy in your country?



*Other renewable sources such as wood, wind, solar energy etc

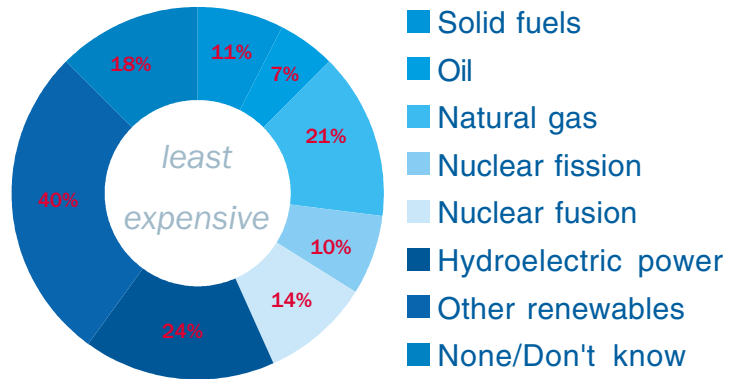
For each of the following statements about electricity please tell me if you think it is the case or not;

EU15 total	Yes it is the case	No it is not the case	Don't know
More than half of the electricity used in the EU comes from coal	21	49	31
More than one quarter of the electricity used in the EU comes from nuclear power stations	55	16	29
More than one quarter of the electricity produced in the EU comes from renewable sources such as hydroelectric power (dams) wind or solar power	30	43	27

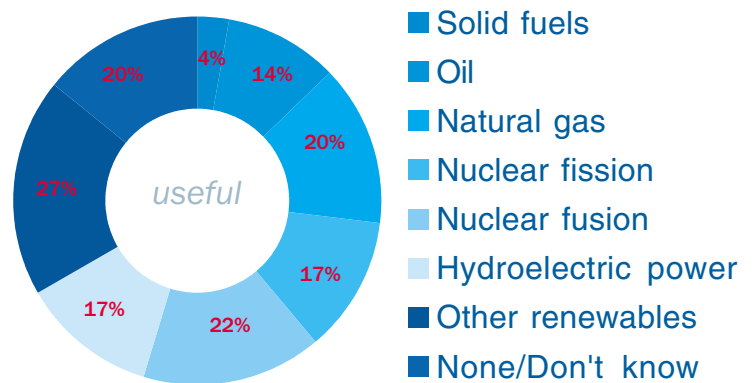


UK's tallest wind turbine, 85m hub height and 75m rotor, at Swaffham in Norfolk, eastern England.

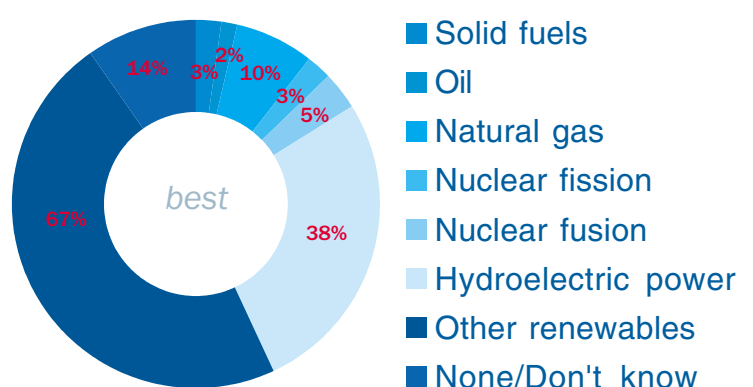
In 2050, which energy resource will be least expensive?



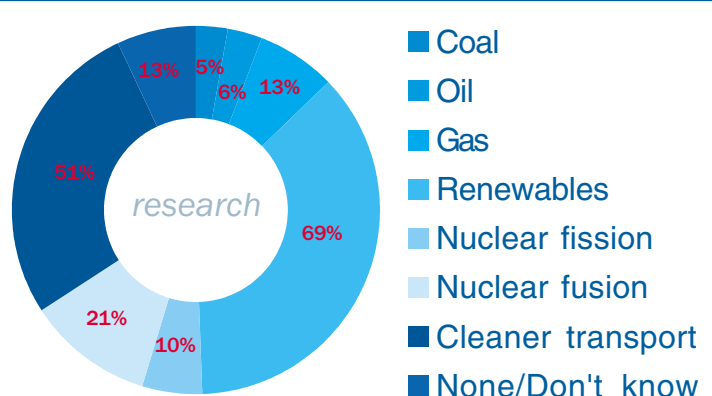
In 2050, which energy resource will provide the greatest amount of useful energy?



In 2050, which energy resource will be best for the environment?



In which areas should there be more energy-related research in the EU?



Source: "Energy: Issues, Options and Technologies", Eurobarometer report, March 2003
http://europa.eu.int/comm/public_opinion/archives/special.htm

Concern for the Environment

The environment and medicine are the areas of most interest to Europeans, according to a Eurobarometer survey on attitudes to science and technology. A large majority (83%) supported basic research if it was aimed at developing "new technologies".

In terms of understanding of scientific issues, more than 70% stated that they understood a shortlist of five: pollution, mad cow disease, the greenhouse effect, holes in the ozone layer and global warming.

On specific environmental concerns, nuclear power and radioactive waste came top of the list in a more recent Eurobarometer report. 50% of respondents said they were "very worried about the issue". By comparison, climate change registered a 39% level, 11th on the list of environment issues. The difference is attributed to the fact that the areas of most concern have been considered problems for over 30 years. The report concluded that environmental concern has spread to the countries of the South. The main source of information is television (81%) and then newspapers (52%).

In terms of who Europeans trust about environmental issues, environmental protection associations come out top, followed by scientists. The European Union and national governments come well down the list.

48% of respondents believe that the most effective way to solve environmental problems is to make national or European Union regulations stricter, with heavy fines for those who break the rules. 45% say raising awareness, and 40% enforcing existing rules.

Sources:

"Europeans, Science and Technology", Eurobarometer, Dec 2001;
"The Attitudes of Europeans Towards the Environment", Eurobarometer, March 2003.
Sample: 16,000 surveyed in both.

Other surveys

AUSTRALIA

The Australian Wind Energy Association commissioned a telephone survey in August 2003 covering 1,027 people.

- 94% of respondents thought that a target to increase the contribution of clean energy from renewable resources was a good (32%) or very good idea (62%). Less than 3% considered the current target to be too high or much too high.
- 88% said they wanted the government to increase support to the renewable energy sector, compared to 26% wanting an increase in support for the fossil fuel sector.
- 95% supported (27%) or strongly supported (68%) building wind farms to meet Australia's rapidly increasing demand for electricity. 91% agreed it was more important to build wind farms for electricity than avoid building them in rural Australia.



Photo: Wolfgang Winter - EWEA

- For 71% of respondents, reducing greenhouse pollution outweighed protecting industries that rely on reserves of fossil fuel.

Results of Australia poll

Question: Do you think Government support to... sector... should be increased ?

Sector	Decrease a lot %	Decrease a bit %	Leave at same level %	Increase a bit %	Increase a lot %	Don't know %
Renewables such as solar and wind energy	1	1	6	21	67	5
Agriculture	1	2	19	31	40	8
Tourism	2	2	40	26	24	5
Mining	5	5	40	14	10	27
Fossil fuels	12	11	34	16	10	17

Question: Australia's demand for electricity is increasing. There are a number of ways of meeting this demand, with some of the options being new coal power plants, gas power plants or clean energy facilities such as wind farms. I'd like you to tell me if you would support or oppose... following options?

Electricity option	Strongly oppose %	Oppose %	Support %	Strongly support %	Don't know %
Building wind farms	1	2	27	68	1
Building gas fired power plants	11	29	43	7	10
Building new coal burning power plants	34	39	17	4	5

Source: Australian Research Group for AusWEA, August 2003, Sample: 1,027.
Full survey available from www.thewind.info/downloads/auswea.pr_7.9.2003.pdf

AUSTRIA

The most recent test of national public opinion on renewable energy was conducted in summer 2003 for the Austrian Utilities Association (VEÖ) by the Gallup Institute. 1,500 people were interviewed about their knowledge, attitudes and future expectations.

Asked which means of producing electricity they liked most, ranging from 1 (very popular) to 5 (very unpopular), the sample placed renewable energy sources at the top of the list. Hydropower (1.27), solar power (1.31) and wind power (1.41) all received the best scores, whilst fossil fuels such as gas (2.88), oil (3.21) and coal (3.27) were much less popular. Bringing up the rear was nuclear, with an average rating of 4.53.

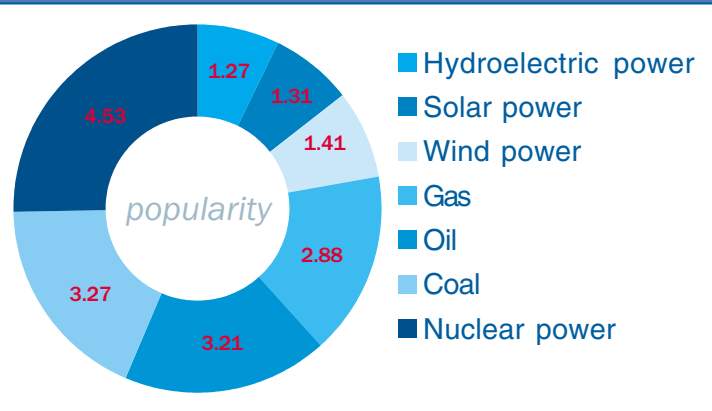
A similar response was given to the question as to which energy sources should be promoted most strongly in the future. 68% of those interviewed wanted stronger promotion of solar power, 55% chose hydropower and 50% wind power. By contrast, 5% wanted stronger promotion of gas, 2% coal and oil, and none for nuclear power.

DENMARK

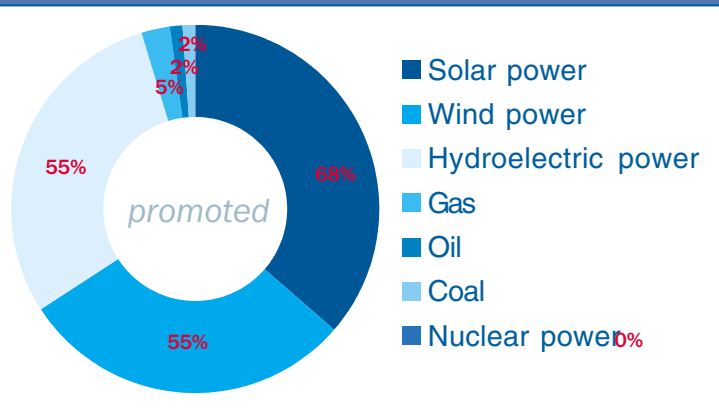
In Denmark, a survey conducted by SONAR in 2001 for daily newspaper Jyllands-Posten shows that support for wind power is overwhelming. 68% of the Danish population answered yes to the question: Should Denmark continue to build wind turbines to increase wind power's share of electricity production? 18% found the current level satisfactory. 7% answered that there are already too many while another 7% were undecided.

The survey also revealed strong support for wind power among the largest government coalition partner's voters. 63% of the people voting for the Liberal Party (Venstre) supported more wind power, 18% found the current level sufficient, while 11% of the party's voters were

Q: How much do you like electricity production stemming from the following energy sources? (Range from 1 = very popular to 5 = very unpopular)

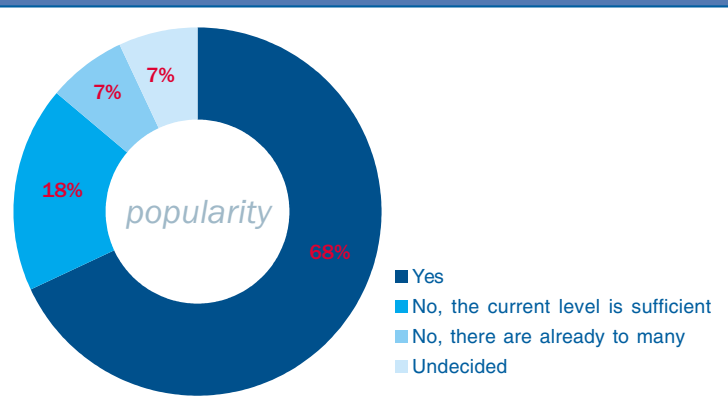


Q: Which energy sources should be more strongly promoted in future?



Source: Austrian Gallup Institute for Austrian Utilities Association, 2003. Sample: 1,500.

Q: Should Denmark continue to build wind turbines to increase wind power's share of electricity production?



against more wind power development in Denmark.

The same survey reveals that 86% of the population is against producing nuclear power in Denmark, while 5% support the idea. The 2001 results confirm earlier survey results on wind power in Denmark in 1996 and 1994.

FRANCE

According to a survey covering 2,800 people carried out in 2002 for ADEME, the national environment and energy agency, 95% of those questioned consider wind to be a non-polluting source of energy, 86% accept that it doesn't aggravate climate change and 77% consider it cheap to produce.

On specific issues to do with the siting of wind farms, 63% said that wind turbines would make the countryside less attractive. In a separate sample of 300 people living near wind farms in the Aude region of southern France, however, opinion was more positive. 46% agreed that turbines affected the countryside whilst 55% considered wind farms to be aesthetically pleasing.

Overall, 86% of the Aude respondents considered that the presence of a wind farm in their area had a positive rather than a negative effect.

A more recent poll (Jan 2003) by Adema-Synovate sampled 2,090 people in urban regions, with two additional samples involving 300 people from the Aude region and 230 people from the Finistère region, both groups living near wind farms.

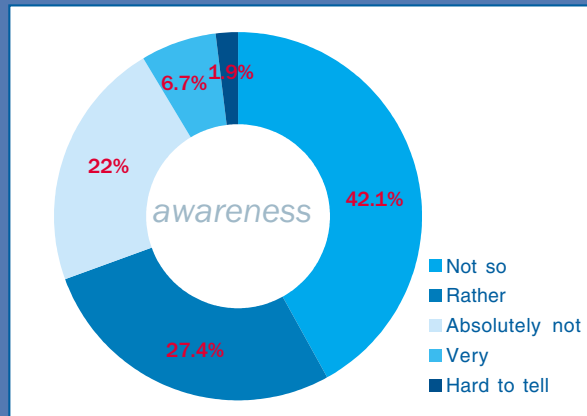
55% considered it a clean source of energy (54% in 2002); 51% believed it to be economical (43% in 2002)

At a national level people perceive wind turbines as disturbing (28%) and noisy (21%), 40% of the Aude sample and 44% of the Finistère sample - both regions with installed

ESTONIA

Q: How well aware are you of environmentally friendly energy production?

Source: Saar Poll, Barometer, 2002, Sample: 1,000



and functioning wind parks - see no negative side to wind turbines. Dependence on wind frequency is also an issue at a national level (26%), but this arguments fades in the regions with functioning wind farms (7% Aude; 5% Finistère).

Of the national poll, respondents agreed that wind turbines are:

- Non-polluting (93%)
- Waste-free (89%)
- Contribute to France's energy independence (82%)
- Don't affect climate change (76%)

In the regions with installed wind parks, people believe that wind turbines are part of the tourist appeal of the area (63% in Finistère and 47% in Aude).

92% of the sample were in favour of further developing wind energy, considering both the environmental and economic advantages of the technology, but also as a substitute to other energy sources, including nuclear.

Sources: "Public Attitude to Wind Energy in France", ADEME/Demoscopie, 2002, Sample 2,800; Adema-Synovate, 2003, Sample: 2,090.

GERMANY

A survey published this year in the science magazine P.M. recorded 66% of Germans in favour of further construction of wind farms. The fieldwork was carried out by the Bielefeld-based EMNID institute. EMNID previously conducted a survey on energy issues, including wind, in spring 2002. This showed that 88% of those questioned supported the construction of more wind farms in Germany, as long as certain planning criteria were met (see table of results). When reminded that gas, oil and coal were limited resources, 86% agreed that the share of wind power in the energy mix should increase. Only 9.5% considered that there was already enough.

A separate survey by Bielefeld University in 2003 among tourists in Germany showed that 76% considered nuclear and coal-fired power plants to "spoil the landscape", whilst only 27% thought the same thing about wind turbines.

Sources: EMNID, 2002 and 2003; Bielefeld University, 2003.

Results of EMNID poll, 2002

Question: Which statements would convince you to support the erection of further wind turbines?

Wind turbines produce green electricity	89.2%
Wind power is a new technology that creates thousands of jobs	62.1%
Wind turbines are easy to control and secure	66.3%

Question: Gas, oil and coal are limited resources, whilst the use of wind power constitutes an alternative. Do you believe that the share of wind power in the energy mix is already sufficient?

Yes, it is sufficient	9.5%
No, it should be increased	86%
Don't know	4.5%

Question: Wind farms must fulfil certain criteria, such as there have to be minimum wind speeds, there has to be enough space between single wind turbines, additional standards in residential and nature conservation areas have to be met. Do you support the construction of further wind farms when those criteria are fulfilled?

Yes	88.3%
No	9.5%
Don't know	2.2%

Question: If we assume that offshore wind farms also have to meet strict standards, would you support their construction far away from the coast?

Yes	82.2%
No	12.7%
Don't know	5%

OFFSHORE

In **Belgium**, which has a very short (65 km) coastline and many holiday resorts, a 2002 survey by the West Flemish Economic Study Office showed that 78% of the public were either very positive or neutral towards a wind farm to be sited about 6 km from the shore. 30% of residents were very to moderately negative to wind farms. The Management Unit of North Sea Mathematical Models, which commissioned the study, recommended that no more than 20% of the horizon should eventually be filled by "built structures", including wind turbines.

Public perception of Belgians near shore wind farms at 6km from the shore

Group	Very to moderately negative	Neutral to very positive
Residents	31.3%	66.5%
Second residence	10.2%	88.8%
Frequent tourists	18.7%	81.3%
Occasional tourists	19.5%	80.5%
Hotel, restaurant, pub with view of sea	6.8%	89.3%
Other	15.3%	84.7%
Total	20.7%	78.3%

In the **United States**, where the proposal for a wind farm in Nantucket Sound, off Cape Cod, Massachusetts, has raised considerable controversy, a survey of 600 local residents was carried out by Opinion Dynamics Corporation for developers Cape Wind Associates.



POLAND

A recent survey conducted among its customers by the Polish electricity utility ENEA asked them whether they would be willing to pay a higher price for their electricity if it was produced from renewable sources such as wind turbines. The results showed that 41% were willing to pay more but 49% were not. 10% were undecided.

Source: ENEA.



SCOTLAND

People living close to Scotland's ten largest wind farms strongly support more of the country's energy needs being produced by the wind, according to a survey conducted for the Scottish Executive by MORI. 82% wanted an increase in electricity generated from wind energy, whilst more than 50% supported an increase in the number of turbines at their local wind farm.

The Executive has a target to generate 40% of the country's electricity from renewables by 2020. The MORI poll covered 1,800 people living within three zones round operating wind farms - up to 5 km, 5-10 km and 10-20 km away. Its main findings were:

- Three times as many residents say their local wind farm has had a broadly positive impact on the area (20%) as opposed to a negative impact (7%). Most people feel that it has had neither a positive or negative impact.
- People who lived in their homes before the wind farm was developed say that, although in advance they thought that problems

Cape Cod survey

Question: As you may know, population growth on Cape Cod has almost tripled over the last 30 years, with no new power plants built on the Cape during that time. Some people think a new power generating facility is needed to meet Cape Cod's future energy needs. Others think there is already an adequate supply of electricity to meet those needs. The likeliest resources available to produce electricity appear to be coal, oil, natural gas, nuclear and wind. Which one of those energy resources would you favor most to provide electricity for Cape Cod and the Islands?

CAPE & ISLANDS:

	FAVOR MOST	FAVOR LEAST
Wind	42%	12%
Natural Gas	6%	3%
Nuclear	7%	44%
Oil	7%	7%
Coal	3%	27%
Other	7%	1%
DK	8%	6%

STATEWIDE:

	FAVOR MOST	FAVOR LEAST
Wind	47%	4%
Natural Gas	25%	7%
Nuclear	5%	46%
Oil	6%	6%
Coal	3%	29%
Other	3%	1%
DK	10%	9%

Question: Actually, Cape Wind Associates has proposed an offshore wind farm that would place 170 wind turbines standing 425-feet tall in Nantucket Sound, approximately five-and-a-half miles from the Town of Hyannis. On average, the project will generate enough energy to meet half of Cape Cod's electricity needs. (People who support the project say it is needed primarily to generate clean, renewable energy for Cape Cod and also to reduce our reliance on imported energy. People who oppose the project say it's not needed primarily because this is a bad location due to the project's visual impact – and also that a private company should not profit from a public resource like Nantucket Sound.) After hearing these positions, do you strongly favor the proposed Cape Wind project, somewhat favor it, somewhat oppose it, or strongly oppose it?

	CAPE	STATEWIDE
Strongly favor	24%	28%
Somewhat favor	31%	36%
Somewhat oppose	16%	15%
Strongly oppose	19%	7%
Don't know	10%	14%

Sources:

Survey by West Flemish Economic Study Office cited in "Enabling Offshore Wind Developments", 3E/EWEA, 2002; Opinion Dynamics Corporation for Cape Wind Associates, 2003, Sample: 600.

might be caused by its impact on the landscape (27%), traffic during construction (19%) and noise during construction (15%), the reality reduced these figures to 12%, 6% and 4% respectively.

- There is good support for the idea of enlarging existing wind farm sites among those who live close to them. A majority (54%) would support expansion by half the number of turbines again, with 9% opposed.

Results of MORI/Scottish Executive poll:

Question: What effect, if any, would you say the presence of the windfarm has had in your local area? Would you say it has had...

	%
A completely positive effect	7
A generally positive effect	13
Neither positive nor negative effect	51
A generally negative effect	5
A completely negative effect	2
Don't know/No opinion	23

Question: Was the wind farm already here when you moved in, or has it been built since then?

	%
Windfarm already here	10
Built since moved in	77
Don't know	14

Question: I would like to know what you anticipated it might be like having a local windfarm (before it was built/before you moved here), and then I will ask you about what it has actually been like.

Question: Which of the following problems, if any, did you think having a windfarm in the area might cause?

Question: And which, if any, have actually turned out to be problems caused by having a windfarm in the area?

Base: All who have lived in the area before the windfarm was built (1,547)

	Thought might be problems %	Have been problems %
Noise from the turbines	12	2
The look of the landscape being spoiled	27	12
Interference with TV and radio reception	6	1
Damaging effect on local business	3	1
Damage to plants or animals	12	3
Noise or disturbance during construction	15	4
Extra traffic during construction	19	6
A reduction in house prices	7	2
None of these	54	82

Question: To what extent would you support or oppose increasing the number of turbines at the windfarm by (insert figure representing 50% increase on existing number of turbines)? Would you...

Base: All

	%
Strongly support	26
Tend to support	28
Neither support nor oppose	25
Tend to oppose	5
Strongly oppose	4
Don't know	11

To what extent would you support or oppose increasing the number of turbines at the windfarm by (insert figure representing 100% increase on existing number of turbines)? Would you...

Base: All

	%
Strongly support	19
Tend to support	23
Neither support nor oppose	24
Tend to oppose	11
Strongly oppose	10
Don't know	14

Question: I am going to read out some different ways of generating electricity. For each one, I would like you to tell me whether you think the proportion of electricity generated in Scotland should increase, reduce or stay at about current levels over the next 15 years? First of all...

Base: All

	Increase %	Keep same %	Reduce %	Don't know %
Coal fired power	9	24	60	6
Oil fired power	9	32	48	10
Nuclear power	7	17	68	9
Wind energy	82	11	2	6
Wave energy	69	11	3	17

- Whilst many respondents said that nuclear, coal and oil generation should be reduced, clear majorities favour increasing the proportion of electricity generated through wave (69%) and wind energy (82%).

Results of MORI Scottish tourists poll:

Question: What effect, if any, would you say the presence of wind farms has had on your impression of Argyll as a place to visit?

A completely negative effect	1%
A generally negative effect	7%
Equally positive and negative effect	43%
A generally positive effect	28%
A completely positive effect	15%
Don't know	6%

Question: Has the presence of wind farms in Argyll made you any more likely to visit the area in future, made it less likely, or has it made no difference?

Less likely	2%
No difference	91%
More likely	4%
Don't know	3%

Results of VisitScotland poll:

Views on development of wind farms as a means of generating power (%)

Good idea – ecologically friendly	39
Good idea generally	17
Good idea – save digging fossil fuels	11
Good idea – need different sources of power	5
In favour of them	5
Necessary evil – better alternative to nuclear	4
Necessity but an eyesore	4
Against – can't generate enough power	2
Good idea – natural resource	1
If not too many – good idea	1
Other positive	1
Other negative	7
Don't Know	5

Impact on further holidays in the Scottish countryside if the number of wind farms was to increase (%)

Would make no difference	63
Steer clear of the area	15
Less likely to come back	10
Depends on the area	6
Minimal impact	2
Other	2
Don't Know/Not stated	5

Two separate surveys have also looked at the effect of wind farms on tourism in Scotland.

A MORI poll commissioned by the Scottish Renewables Forum and the British Wind Energy Association in 2002 found that over 90% of visitors would return to Scotland for a holiday whether or not there were wind farms in the area. Of those who had actually seen wind farms whilst on holiday, 8% had come away with a negative impression. Eight out of ten said they would go to a wind farm visitor or information centre during their stay.

A second survey by the VisitScotland tourism agency recorded that 75% of visitors were either positive or neutral towards wind farm development in general, although less positive about their specific visual impact. The attitude of those who had actually experienced

wind farms tended to be more positive than those who had not. 63% said it would make no difference to their decision to holiday in Scotland if the number of wind farms increased.

Sources: "Public Attitudes To Wind Farms: A Survey of Local Residents in Scotland", MORI for Scottish Executive, 2003, Sample: 1,800 ; "Tourist Attitudes Towards Wind Farms", MORI Scotland, 2002, Sample: 307 tourists ; "Investigation into the Potential Impact of Wind Farms on Tourism in Scotland", VisitScotland, 2002, Sample: 180 visitors.

 SPAIN

A number of recent studies have looked at the social acceptability of wind energy in three regions of Spain where there have already been large wind farms constructed. The regions are Navarre, Tarragona and Albacete.

Navarre

The most recent study was conducted in 2001 on behalf of Spanish developer EHN by CIES, a member of the Spanish Association of Opinion and Market Studies. This showed 85% in favour of the implementation of wind power in Navarra and 1% against.

The results show acceptance of wind energy growth getting stronger at the same time as the wind farms have been built. Opinions about particular wind farms also become more positive once they are installed.

In a previous CIES study of EHN wind farms carried out in March 1998, wind energy was the preferred energy resource for 75% of people in Navarre. 19% supported hydro power and 1% nuclear.

This study also showed that for most people the benefits of wind energy compensated for any negatives effects experienced during implementation. Wind farms are also equally accepted by people who live near them and those who live far away..

Opinions on four different wind farms in Navarre were:

- **El Perdon:** 82% think it is a step forward & 2% think it is a step back (Sample: 250,000 visitors from the end of 1994)
Effect on landscape:
41% say it makes no difference, 32% say it disfigures the landscape and 24% say it improve it.
- **Leitza-Beruete:** 74 % think it is beneficial and 7% think it is damaging.
Effect on landscape:
56% say it makes no difference, 36% say it has an effect.
- **Guerinda:** 76% think it is beneficial and 4% think it is damaging.
Effect on landscape:
56% say it makes no difference, 42% say it has an effect
- **Alaiz-Izco:** 81% think it is beneficial and 6% think it is damaging.
Effect on landscape:
45% say it makes no difference, 29% say it disfigures and 19% say it improves.

Tarragona

Four studies were commissioned by APPA, the Spanish Renewable Energy Association, in November 2001, May 2002, December 2002 and May 2003. These covered 2,400 people in total, 600 per poll.

The results show that four out of five Catalonian citizens are in favour of wind energy, reflecting the fact that the south of



Wind turbines often operate close to leisure activities, here at Cumbria in the UK.

Photo: Paul Carter

Catalonia counts among the best Spanish sites for the installation of wind parks. However, difficulties in getting connected to the network and the lack of a strong political support have slowed down considerably the development of wind energy in the region.

The four polls run in Catalonia since 2001 show that the strongest support for wind energy technology comes from people living near a wind park, and that 87% of the population is against polluting energy sources such as fossil fuels and nuclear. 75% are ready to save energy if by doing so they can contribute to reduced dependency on these sources.

62% also believe that the advantages of wind energy outweigh the negative impacts. 82% are in favour of using energy from renewable sources. 58% consider wind energy capable of generating income.

Albacete

A CIES study carried out in October 2002 for wind development company Energías Eólicas Europeas (EEE) showed that 79% considered wind energy to be a benefit and 1% a step backwards. Between 79% and 91%

think that the benefits from wind energy compensate for any negative effects on the environment of implementing it.

All the areas where wind farms have been built in Albacete approve of the presence of the turbines. 70% consider that they are beneficial.

Acceptance of wind energy is based on three reasons: environmental, energy-related and socio-economic. People consider that is a clean energy source and a wealth and job creator.

69% of those surveyed thought that wind energy was the best energy resource to produce electricity. This is compared to the 17% supporting hydro, 2% for thermal power and 1% for nuclear.

Sources:
CIES, 2001, Sample: 1,369; APPA, 2001-2003, Sample: 2,400; CIES, 2002.

SWEDEN

A majority of Swedes prefer wind power as a way of increasing electricity production, according to the latest opinion survey by SIFO. Given a choice between hydro, wind, biomass, coal and nuclear as the fuel for any new power plants to be built in Sweden, 64% chose wind energy. 25% of those who chose nuclear put wind as their second choice. Also noticeable was that even those whose politics are on the right of the Swedish political spectrum, traditionally expected to be less keen on wind energy, were found to be enthusiastic.

In other questions posed in the poll, 73% agreed that Sweden should follow the policy of the EU directive and increase electricity production from renewables, whilst 82% thought that the country should rely on domestically generated electricity rather than imports.

Results of Swedish poll:

Question: *If we are to increase the domestic production of electricity, by which means do you think we should do this? Should it be done by building more windpower, hydropower, coal fired plants, nuclear plants or plants fired with biomass?*

Wind power	64%
Hydropower	39%
Coal	2%
Nuclear	25%
Biomass	36%

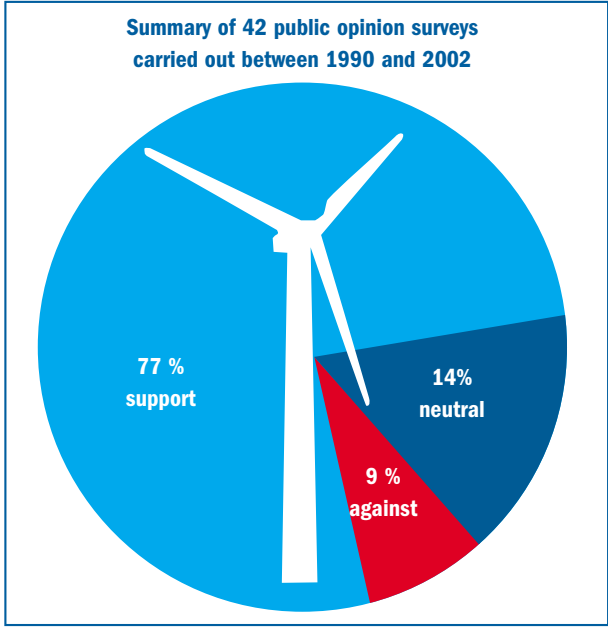
Source: SIFO, 2002, Sample: 1,000.

Evolution of public acceptance of EHN wind farms in Navarre

Date	April 1995	Dec. 1996	April 1998	Sept. 2001
Turbines installed by EHN (*)	6	72	187	658
Positive opinion	85%	81%	81%	85%
Negative opinion	1%	2%	3%	1%
Indifferent / Don't know	14%	17%	16%	14

Photo: Wolfgang Winter/EWEA





USA

Two recent regional surveys give some indication of local opinions in the United States. In Vermont, a green state in the north-east, 70% of the state strongly agreed or agreed with the statement that "I would like to see more wind turbines in Vermont". When asked which single energy source they would like to see more of in the future, respondents replied wind most often (30%) – with renewables at 71%, and wind and solar at 55%. Nuclear and oil scored 4% and 3% respectively and coal had no support. (Source: ORC Macro telephone Poll in July 2003 of 600 Vermont residents.)

In April the Long Island Power Authority (LIPA) released a study on the potential of offshore wind. A Newsday online poll asked one question: "The LIPA will seek to build a 100MW wind farm in the waters off Jones beach. Do you think windmills should be built off Long Island?" 86% said yes out of a total of 1,349 respondents.

Results of Ipsos/BWEA poll:

Question: To what extent, if at all, do you support the Government's ambition to generate 20% of our electricity needs from renewable power (wind, waves, solar etc) by 2020?

Strongly support	43%
Tend to support	31%
Neither support nor oppose	16%
Tend to oppose	2%
Strongly oppose	3%
Don't know	5%

Question: To what extent, if at all, do you support increasing the use of wind power in the UK?

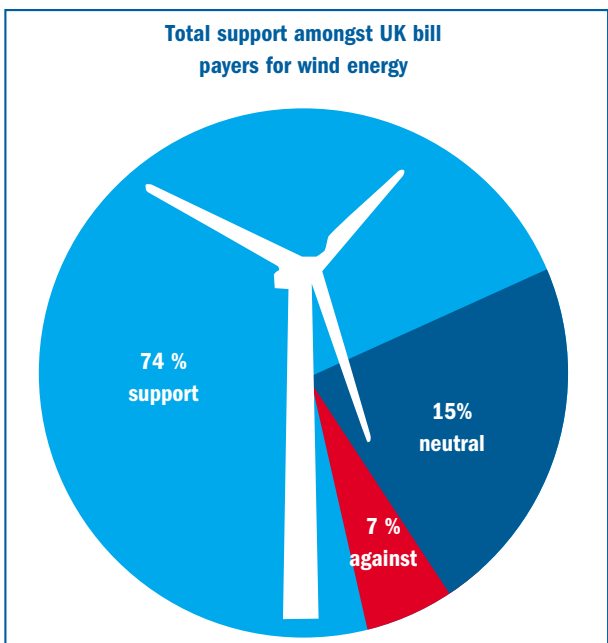
Strongly support	40%
Tend to support	34%
Neither support nor oppose	15%
Tend to oppose	4%
Strongly oppose	3%
Don't know	5%

Sources: Ipsos for British Wind Energy Association, 2003, Sample: 2,600; Summary of surveys, 1990-2002, BWEA.

UNITED KINGDOM

Most Britons who pay electricity bills are strongly in favour of both more renewable energy and more wind power. This was the outcome of a survey carried out this summer among more than 2,600 domestic bill payers by Ipsos on behalf of the British Wind Energy Association. 74% of those questioned supported the UK government's ambition to generate 20% of electricity from renewables by 2020, and a similar level of support was demonstrated for increasing the use of wind power.

These results echo closely the findings of previous opinion polls conducted in the UK by various organisations since the first wind farm started generating electricity in 1991. A summary of 42 surveys carried out between 1990 and 2002 shows an average 77% of the public in favour of wind energy. Those against averaged 9%.



Development Manager

Competitive Salary + Benefits

Natural Power is part of a highly successful renewable energy development, construction and operations consultancy company specialising in wind energy. We are currently seeking a committed, professional individual to join our highly successful team.

Reporting to the company's UK Director, you will be co-ordinating and project managing activities associated with the development of the company's wind interests in the UK. You will be based at the company's headquarters in St. John's Town of Dalry, Dumfries and Galloway. You will ideally have significant experience in all aspects of the development of wind energy (or similar) projects. You will be a highly motivated individual who can work unsupervised with the ability to be flexible whilst adhering to strict deadlines and with an ability to communicate effectively and to manage others. You will be expected to manage and work to a budget.

You will have mature IT skills with competency within MS Office suite being essential. Training will be provided where necessary. You must carry a full UK driving licence and will be able to maintain a reasonable level of personal fitness.

If you relish working in a friendly and supportive atmosphere within an exciting industry and in an award winning Eco-office set in spectacular countryside, please respond to Gwen Patterson requesting an application form:

Closing Date:
30th September 2003

natural power

The Green House
Forrest Estate, Dalry
Castle Douglas DG7 3XS
Scotland UK
Tel. +44 (0) 1644 430008
Fax. +44 (0) 1644 430009
Email: post@naturalpower.com
www.naturalpower.com