

BWEA

Marine Renewable Energy

Supply Chain Workshop
Inverness

Oliver Wragg
BWEA, Wave & Tidal Development Manager
11th November 2009

BWEA – Members

Sponsors



Over 500 Company members

Broad membership of developers, suppliers,
grid companies, financiers and service providers

BWEA is the UK's leading representative for the UK wind, wave and tidal energy industries

- Industry Forum
- Parliament Representation
- Media Representation
- Committees
- Conferences
- Workshops
- Guidance and Standards
- Accredited training
- Skills and apprenticeships

The benefits of marine technologies within a diversified renewables mix

- Commissioned by the BWEA
- Conducted by Redpoint Energy
- Increased proportion of wave and tidal energy would:
 - Reduce requirements for back-up and reserve capacity
 - UK cost savings ~£0.9bn/year
- Available for download www.bwea.com/marine



The benefits of marine technologies within a diversified renewables mix

A report for the British Wind Energy Association
by Redpoint Energy Limited



BWEA State of the Industry Report

- Commissioned by the BWEA
- Conducted by Entec
- Launched at BWEA 31 conference 22nd October
- Available for download www.bwea.com/marine



Entec

Marine Renewable Energy

State of the industry report – October 2009



Report findings

UK leading the world

- **The majority of the world's wave and tidal technology companies are active in the UK**

UK Islay 500kW Limpet

**UK Strangford 1.2MW
MCT SeaGen**

**UK EMEC 250kW
OpenHydro**

**UK EMEC 500kW
TGL**

**UK EMEC 300kW
Aquamarine Oyster**

**UK EMEC 150kW
OPT PowerBuoy**

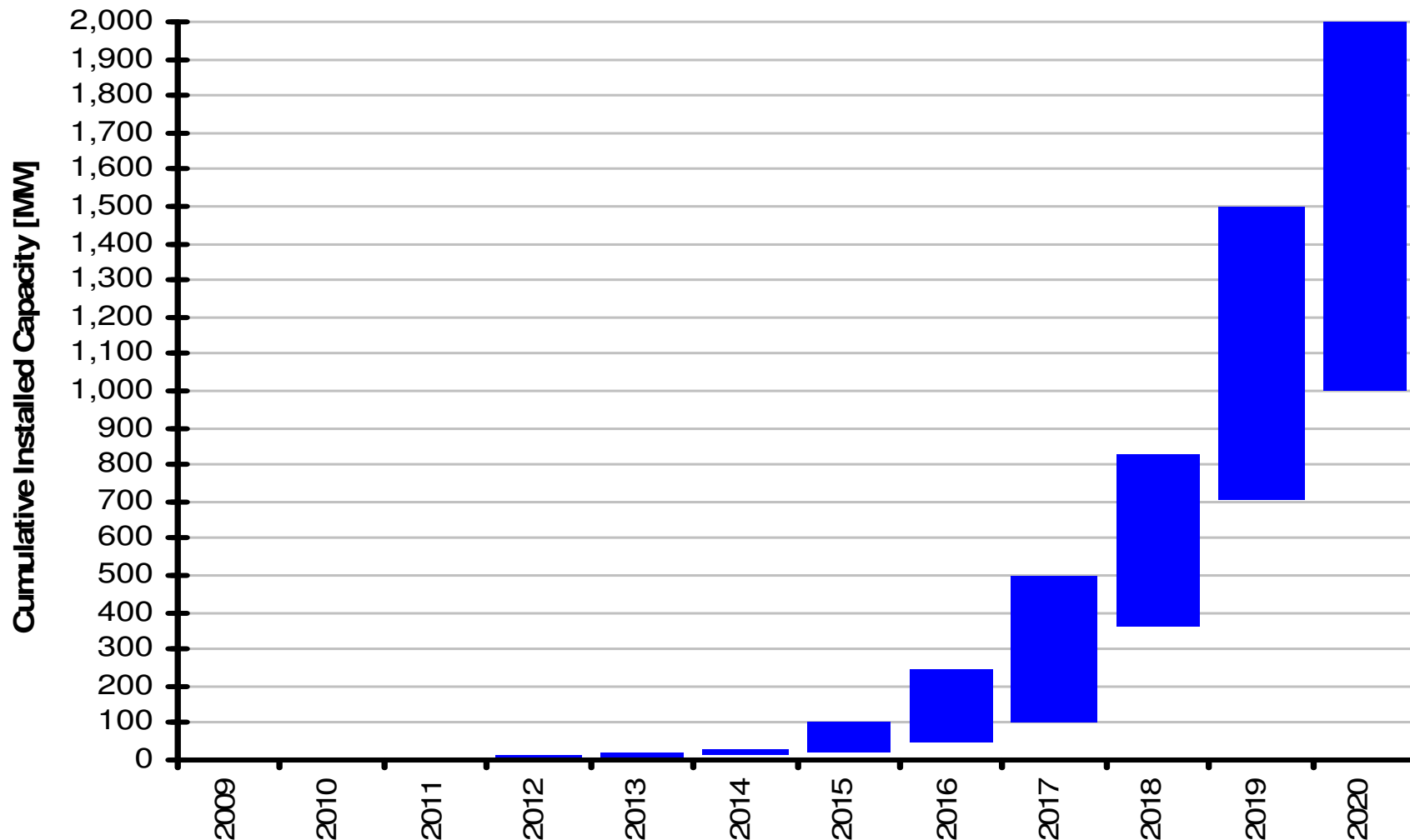
**UK Humber 100kW
Pulse Tidal**

**Portugal 2.25MW
Enersis Pelamis
(export)**

Report Findings

Installed Capacity Predictions

- 1-2000 MW installed in UK by 2020



Supply Chain

Why work on the supply chain?

Huge Potential Economic Prize

Marine Energy Group Road Map – 1GW by 2020:

“Overall expenditure could rise to **£2.4bn**”
“**5,000 direct jobs**”



Scottish Enterprise 1GW by 2020 - **12,500 gross jobs** (direct & indirect)

Requirements

1,000 units between now and 2020 = 1 GW

8 units per week 2015 - 2020 = 2 GW

Supply Chain

What does the supply chain need?

Understanding around the Generic Issues e.g.

Installation Vessels

Fabrication Facilities

Operation and Maintenance Vessels

Facilitate Knowledge Transfer – Oil & Gas, Marine Engineering, Ship Building, etc

Coordination – Focused industry approach to achieve success

Tell us what you need...

Today

Presentations and Setting the Scene



Technology Strategy Board
Driving Innovation



Workshop

Blade design

Minimisation of environmental impact

Sub sea deployment techniques

Specialist deployment vessels

Safety and training,

Wet electrical connectors

Design for increased reliability

Outputs

BWEA Workshop Report

Recommendations to funding bodies and government

Feed in to BWEA supply chain strategy

BWEA

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