

State of the Industry - 2011

RenewableUK
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RenewableUK

Sponsors



Over 700 Company members

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

State of the Industry - 2011

Figure 1: Installed and predicted, Cumulative and Annual Marine Energy Capacity 2000-2014



State of the Industry 2011 – Technology Advances



The innovation challenge

The Black Hole

- Universities don't have the experience
- Industry doesn't have the time
- Consequence: Research fails to reach Market

Product Challenges

New Materials
Novel geometry
Tighter Specification

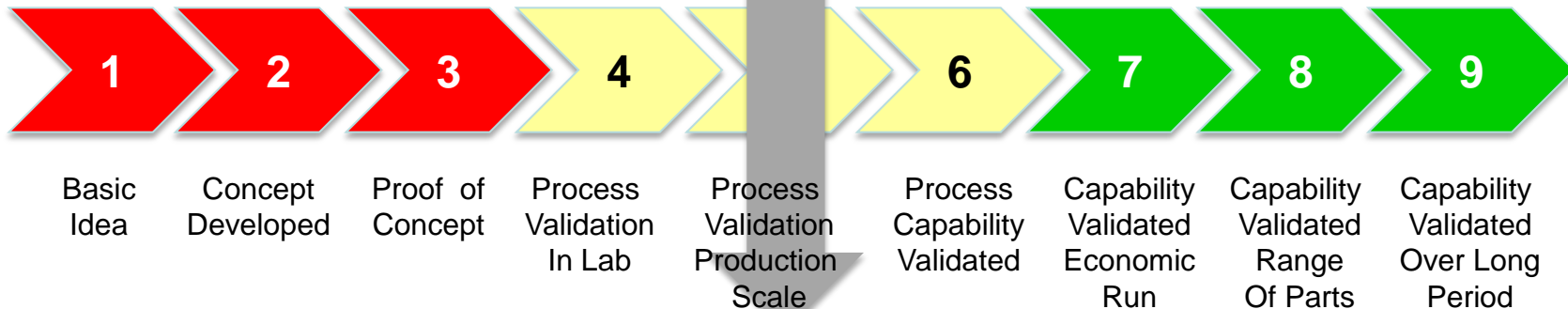
Business Challenges

Lower operating and material costs
Improved process capability
Reduced lead times
Delivery adherence

Universities

The Black Hole

Industry











Technology Advances - Since March 2011

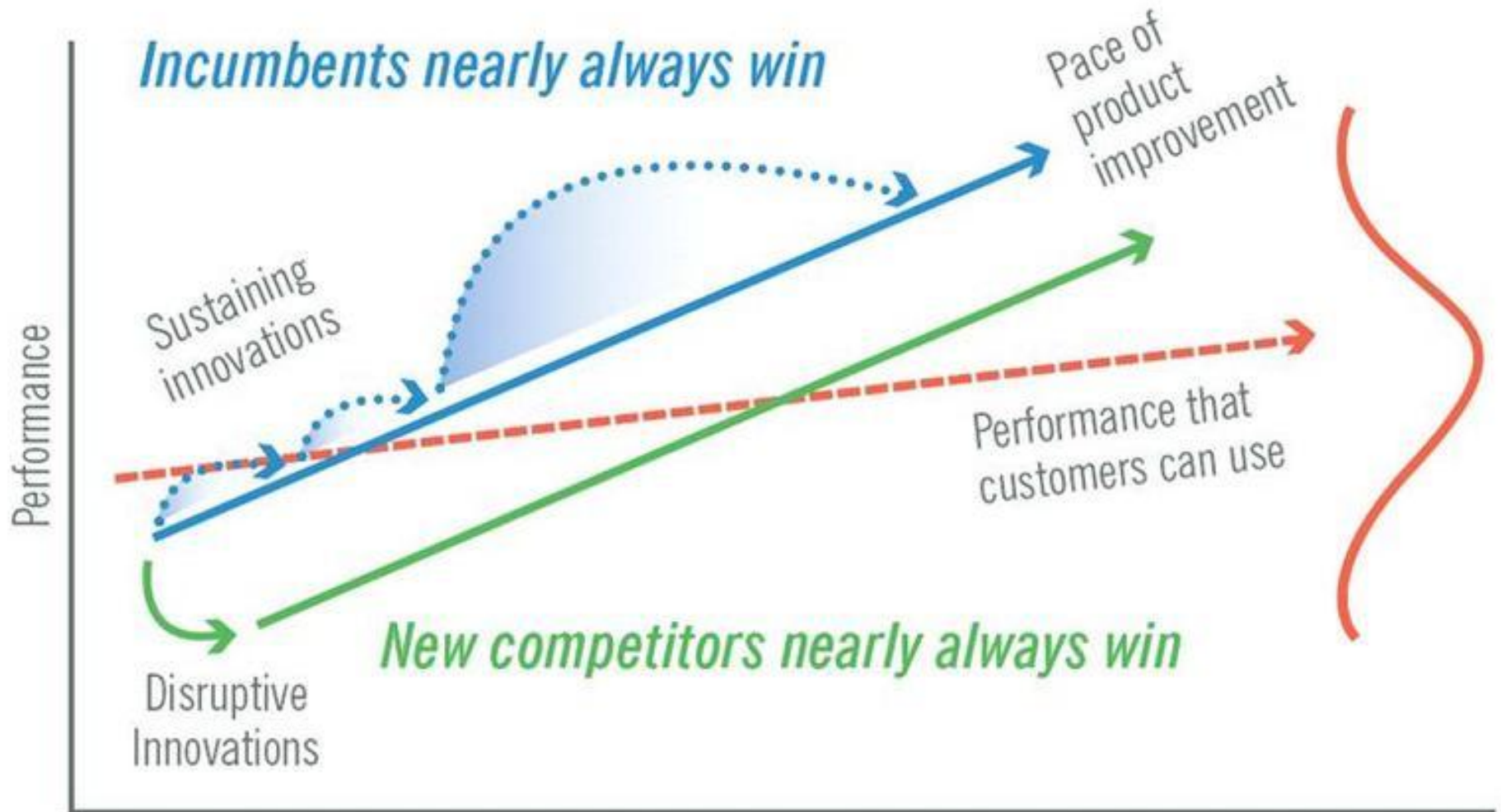


How to Become the Greenest Government Ever

Type	Source	Detail	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Technology Support	Carbon Trust	Carbon Reduction										
	Technology Strategy Board	Knowledge Exchange										
	Scottish Enterprise	Buisness Development										
	Scottish Government	Sector Development										
	Technology Strategy Board	Innovation Centre										
EPSRC	Academic											
Array Support	DECC - £200m LCIF	2MW+										
	Energy Technology Institute	2MW+ (Tidal Array)										
	Framework Programme 7	3MW+										
	Framework Programme 8	???										
	Scottish Government	Saltier Prize - 100MWh										
New Entrants Reserve 300	5MW+											
Revenue Support	Renewables Obligation Electricity Market Reform	5 ROCs CfD or FIT										
Bank Product	Green Investment Bank European Investment Bank	Performance bonds, loans, etc										

Technology Advances - Planned for 2012





Source: Clayton Christensen, *The Innovators Solution*

Conclusions

The marine energy industry is in your hands!

- Opportunities to develop the world leading UK marine energy industry
- Growing funding opportunities
- MEAD moving the game forward

How to drive the industry:

- Mega watts of operating hours
- Cost reduction stories

Get involved!!!!

RenewableUK Annual Conference 2011 25th – 27th October 2011, Manchester

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Thank you