

Removing Barriers to Deployment Through Policy Development

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RenewableUK

Sponsors



Over 580 Company members

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



RenewableUK previously: 

What did policy ever do for us?

EU Directives

- 2001 - EU RES Directive

UK Primary Legislation

- 2008 – UK Climate Change Act
- 2008 – Renewables Obligation
- 2009 – Marine and Coastal Access Bill

What did policy ever do for us?

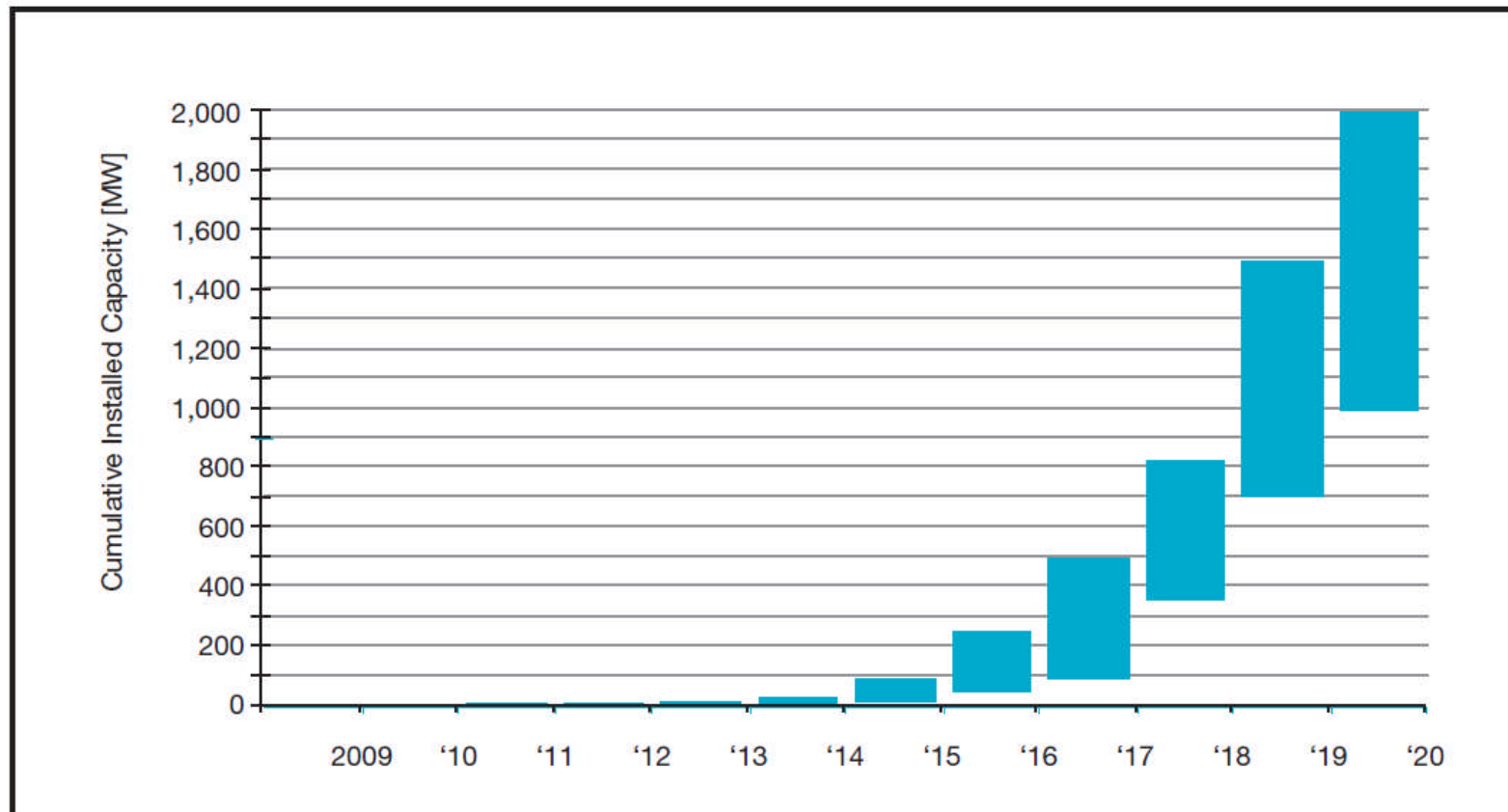
Government Documents

- 2009 - Renewable Energy Strategy – DECC
- 2009 - Low Carbon Industries Strategy – BIS
- 2009 - Marine Energy Roadmap - FREDS MEG
- 2010 - Marine Energy Action Plan - DECC Marine Action Plan

- Projected 2010 - Project Discovery – Ofgem
- Projected 2010 - 2050 Vision – DECC
- Projected 2010 – Renewable Energy National Action Plan -
EU RES Directive

Where are we going?

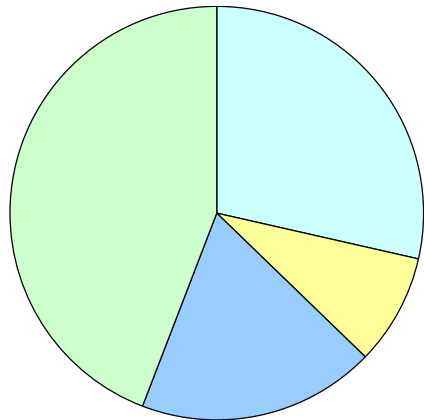
Figure 1. Potential UK Cumulative Installed Capacity of Marine Energy Projects to 2020 ⁷



How will we get there?

The Marine Energy Action Plan

- Private and Public Sector
- 74 Organisation



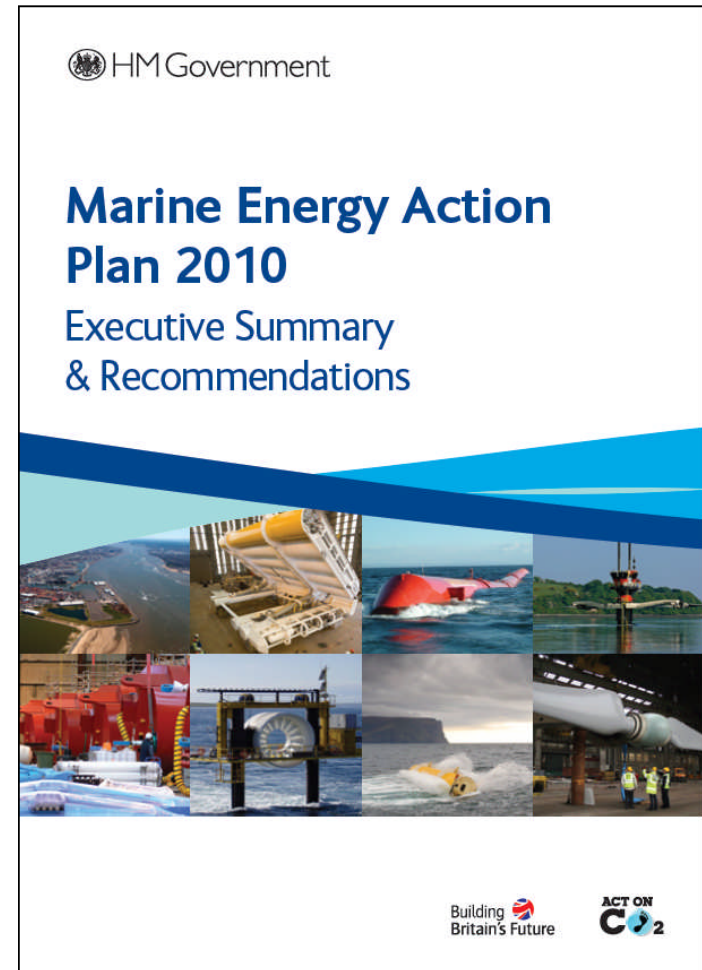
Public Sector

Utilities and Major Manufacturers

Technology Developers

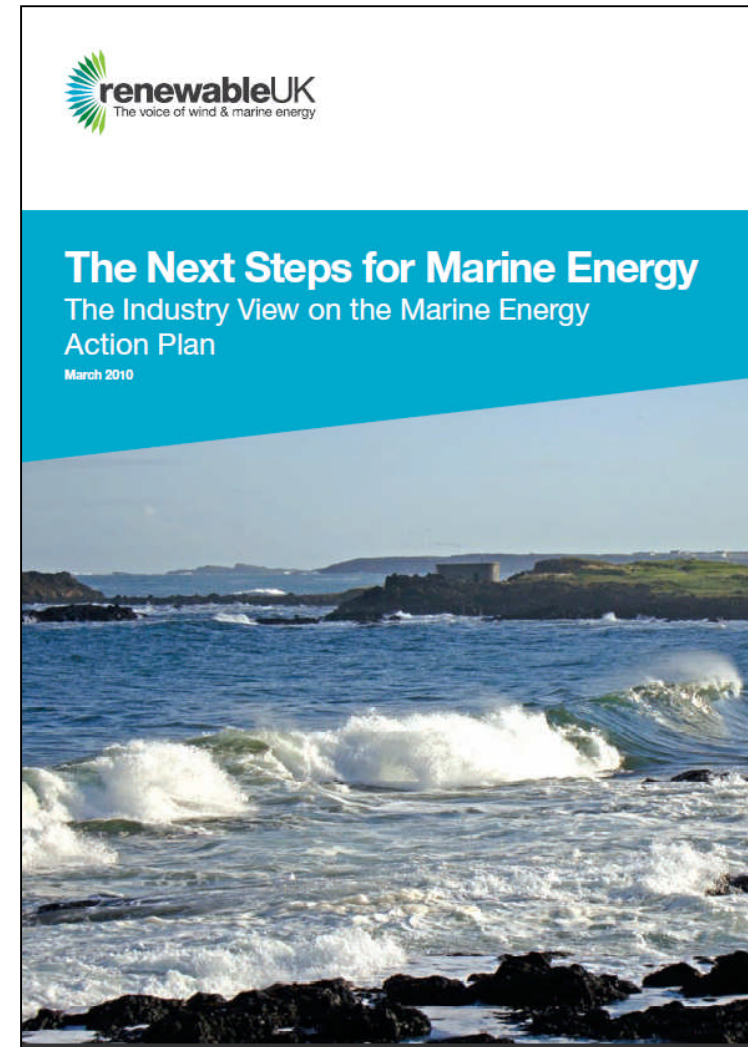
Private Sector Other (Supply Chain, Ports, Finance Community, Consultants)

77% members of
RenewableUK



How will we get there?

- Technology Pathway
- Environment, Planning and Consent
- Infrastructure supply chain and skills.
- Finance and Funding



Technology Development

- 2.4 MW to date
- Over 1000MWh Generated
- Major manufacturers and supply chain backing.

Next Step:

- Standards and Best Practice – EMEC & BSI PEL 114

Environment, Planning and Consent

- Marine Bill – MMO, MCZ, MPS & MSP

- SEA

Completed in Scotland

Final Consultation in NI

Initiated England & Wales

Leasing Round

1.2 GW awarded and FSR

Potentially Q4 2010???

Potentially Q3 2011???

Next Step:

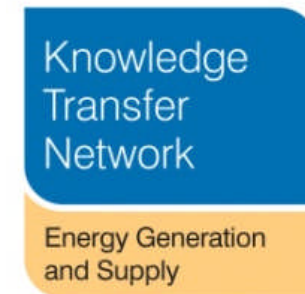
- Work with SNCB's to develop methods to encourage deployment of prototype devices. E.g. SNH deploy and monitor guide lines.

Infrastructure, Supply Chain and Skills

- World Class Testing Facilities
- Port Development
- Grid
- Supply Chain Engagement

Next Step:

- Industrial Strategy to fully capitalise on the existing value chain.



Finance and Funding

Basic Outline of Industry Stages to Commercialisation and Types of Support Required

VOD???

1st & Next Generation Prototype

Market Push:
E.g. Capital Grants

Coordinated messaging has provided **48.6 million** from March 2009 – March 2010

Estimate **50 million per year required** in technology development up to 2015

First Wave/Tidal Farms

Market Push AND Pull:
E.g. Capital Grants (Push)
E.g. Multiple ROCs (Pull)

Major manufacturers able to underpin technology guarantees financially and technically

£1 billion for Wind/Solar.

UK £200 million to date

Next Step:

Avoid doing just enough to fail!

2nd Farms and Beyond

Market Pull:
E.g. Multiple ROCs

The RO Time Line

Q4 2010, Data Collection

Q3 2011, first view & RAB consultation

Q3 2012, Consultation Close

Q4 2012, First view of final figures,

Q2 2013, revised figures come into effect.

EU Policy Development

Identified EU funding requirements up to 2020 through European Industrial Initiatives:

Wind – Euro 6 Billion

Solar – Euro 13 Billion

Marine – Limited Funding

EU-OEA Road Map – Euro 850 million for 6 x 40MW Arrays

New Entrants Reserve 300 = Estimated Euro 4.5 billion

Just in case you had forgot!

- 29GW in UK \approx £4.2bn per annum + 43,500 Jobs
- 188GW in EU
- Substantial carbon reductions
- Security of supply from indigenous resources

What next?

- Deliver Recommendations of Marine Energy Action Plan and Marine Energy Road Map
- Coordinate industry message with EU & develop a European Industrial Initiative
- Ensure adequate representation within Renewable Energy National Action Plan

Thank you

**Visit us @ Stand F20
All reports available @
www.renewable-uk.com**

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