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26 SEPTEMBER 2018
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Claire Mack

Chief Executive

Scottish Renewables

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#SRMARINE18



Where are we now?

Tweet @ScotRenew

#SRMARINE18



Kersti Berge

**Director for Energy and Climate Change
Scottish Government**



Vision for Scotland

Climate Change

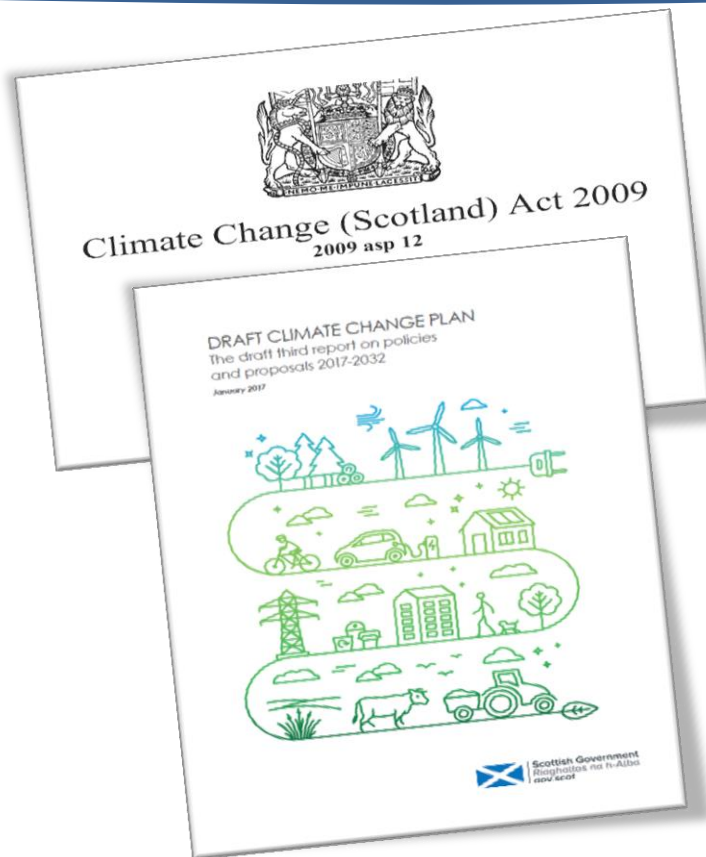
Director for Energy and Climate Change



Scottish Government
Riaghaltas na h-Alba
gov.scot



Decarbonising – the drivers



Scottish Government
Riaghaltas na h-Alba
gov.scot



2050 Vision

- Scotland has achieved almost complete decarbonisation of the energy system – in line with domestic and international climate change targets
- The equivalent of 50% of all energy consumed in Scotland from renewable sources by 2030
- Scotland is a world-leader in renewable and low carbon technologies and services – and continues to offer technology solutions in oil and gas, and excellence in subsea engineering. This knowledge and expertise is exported internationally
- Communities benefit extensively from low carbon heat networks
- Carbon capture and storage is operational at large scale and plays a crucial role in decarbonising Scotland's energy system and industrial processes
- New forms of flexible generation and demand management services are widespread
- Shared ownership of renewables and of local energy systems maximise benefits to Scotland's communities



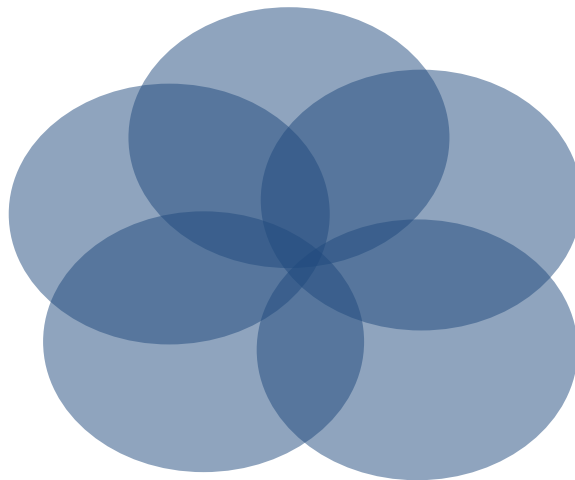
Carbon Emissions

Economic Impact

Security of Supply

Fairness

Consumer Costs



Scottish Energy Strategy



‘Whole-system’ view

- Economic modelling, informing view of Scotland’s future energy supply and demand
- Integrated approach to heat, power and transport
- New 50% ‘all energy’ 2030 renewables target
- Renewed focus on energy efficiency and energy demand reduction
- Flexibility



Inclusive transition

- Tackling fuel poverty and inequality
- Support “high carbon” communities through the transition
- Just Transition Commission



A smarter model of local energy provision

- Encouragement for new localised models of energy supply and use
- Enhanced role for local planning and local ownership
- New economic opportunities of energy storage and ‘smart’ energy solutions



Success

Scotland remains the world leaders in marine:

- **Atlantis Energy's MeyGen** project in in the Pentland Firth – the world's largest tidal stream array - entered commercial operations in March 2018
- On 21 August 2018 **Scotrenewables** announced that its 'SR2000' tidal turbine in Orkney has generated 3 GWh in the past 12 months.
- **EMEC** has tested 30 different wave and tidal energy devices to date.
- **Nova Innovation** successfully deployed a third turbine at its Shetland Tidal Array

Commitments

- Support for innovation and cost reduction in wave energy, through continued funding for Wave Energy Scotland
- Finance support for marine energy projects through the Renewable Energy Investment Fund – and other financial support mechanisms



What next?

- Ministerial Marine Energy Taskforce – maximising the opportunity
- Continue to engage with UK Government on an offer support for marine renewable technologies – one voice
- Developing the economic picture
- Re-engaging the private investment community the strong industrial potential of marine energy



Scottish Government
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Sue Barr
Board Member
Scottish Renewables

Claire Mack

Chief Executive, Scottish Renewables

Kersti Berge

Director for Energy and Climate Change, Scottish
Government

Sue Barr

Board Member, Scottish Renewables



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Building momentum: telling our story

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Peter Duncan

Managing Director
Message Matters



Making waves - telling your story

A Message Matters Presentation
for Scottish Renewables Marine Conference



The national political & policy environment



A time of transition





See the opportunity in policy uncertainty





Opportunity: technological leadership

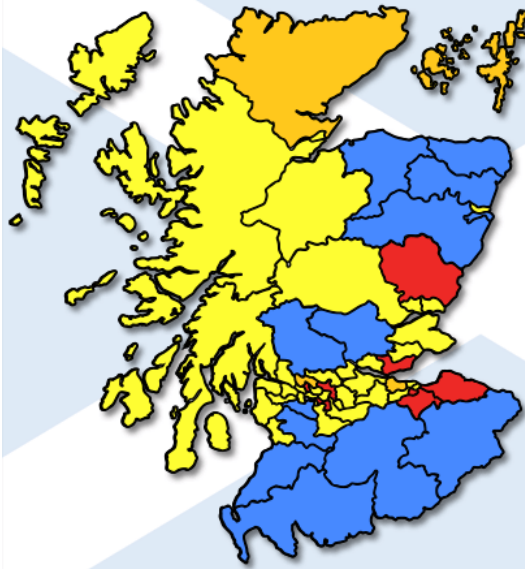


“Brexit *dividend*” being replaced by
“brexit *imperative*”



Opportunity in the politics

2017 ELECTION RESULT



- Tiny government majority
- Scots Tories on back foot on onshore renewables
- Whisky comparison



**“Get your story straight,
time it perfectly, and
tell it relentlessly.”**

Dan Pfeiffer



“The wind is changing direction on renewables generally. The only question is how quickly and how far will the implications reach?”

Scottish Govt adviser

“Far too easy for governments to play politics on marine technology. That’s assisted by too many voices with slightly different messages - industry needs to speak with one voice”

UK Select Committee member

Talk the right language

- *Be absolutely clear on your ask - investment/route to market*
 - *Work together - benefits will be shared*
 - *Differentiate your message from wind technology - fundamentally different*
-



Speaking the right language



*CfD policy
reversal*

*Global technological
leadership*



*Prioritised
investment*



Key message:

**Don't be
distracted -
seize this
moment**

Audrey MacIver

Director of Energy and Low Carbon
Highlands and Islands Enterprise

MARINE ENERGY: POWER, PEOPLE, PLACES

AUDREY MACIVER
DIRECTOR OF ENERGY & LOW CARBON

26 SEPTEMBER 2018



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean




OUR VISION **A HIGHLY
SUCCESSFUL & COMPETITIVE
REGION**

For the Highlands and Islands to be a highly successful and competitive region in which increasing numbers of people choose to live, work, study and invest.

OUR PURPOSE **& INCLUSIVE
SUSTAINABLE ECONOMIC GROWTH**

To generate sustainable and inclusive growth across the Highlands and Islands.





OUR PRIORITIES **DEVELOPING** **CREATING** **SUPPORTING** **STRENGTHENING**

- Supporting businesses and social enterprises to shape and realise their growth aspirations
- Strengthening communities and fragile areas
- Developing growth sectors, particularly distinctive regional opportunities
- Creating the conditions for a competitive and low-carbon region

DRIVERS OF CHANGE

1965



Establishment of
Highlands and Islands
Development Board
(HIE)

1975



Local
government reform

1970's



Exploitation of
North Sea oil

1970/80/90's



Upgrading of
transport
infrastructure

1980/90/00s



Upgrading of telecoms
infrastructure

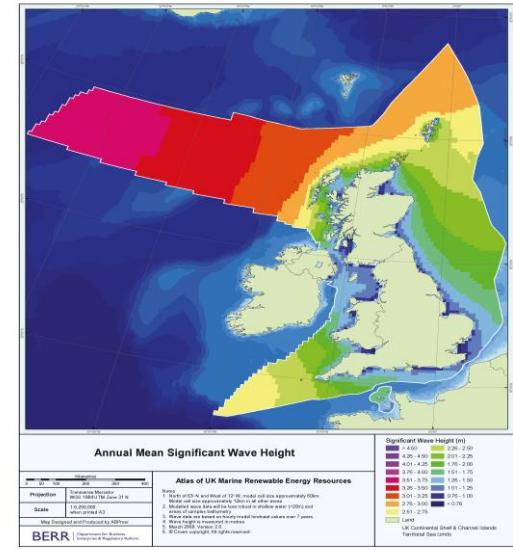
2010/20s



Marine Energy

Why Marine Energy?

- Natural, competitive advantage
- Strong fit with HIE purpose
- Unique physical assets (>£160m invested in ports and harbours in last 8 years)
- Experienced supply chain (oil/gas diversification, marine operators, consultancy support, manufacturing)
- Academic excellence (ICIT, SAMs, ERI)



Our commitment to Marine Energy

- Led development of EMEC
 - 2003 Wave site
 - 2006 Tidal site
 - Nursery sites
 - >£35m total investment
- Supported investment, innovation and R&D (e.g. WATERS, REIF, EIF)
- Established Wave Energy Scotland



EMEC, Orkney

A GLOBAL CENTRE OF EXCELLENCE IN
MARINE ENERGY TESTING AND RESEARCH

EMEC ORKNEY
THE EUROPEAN MARINE ENERGY CENTRE LTD



31 • **20** • **11**
devices **developers** **countries**



Cumulative Impacts (up to 2017)	Jobs FTE years	Earnings (£m)	GVA (£m)
Orkney	1,653	55.9	98.3
Highlands & Islands	1,969	65.0	116.3
Scotland	3,244	113.9	213.6
UK	4,227	149.8	284.7

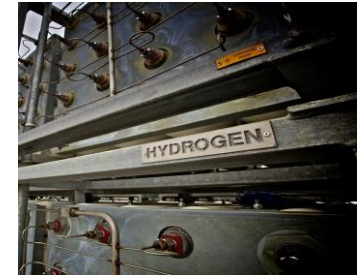
WES

- HIE subsidiary, est 2014
- 84 projects (PTO, Materials, NWECC, Control Systems)
- £30.9m invested
- 177 organisations
- 13 countries
- Over 100 documents published
<http://library.waveenergyscotland.co.uk/>



Near and Mid-term Ambitions

- Celebrate and communicate success
- Support/influence conditions necessary to create market (domestic and international)
- Marine Energy established as a key driver of the Marine and Rural Economy
- Competitive, agile, robust, internationally renowned supply chain
- Continued excellence in R, D & D



CLOSING REMARKS

- We must continue to build a robust evidence base
 - Power
 - People
 - Place
- We have a fantastic story to tell – let's tell it better
- We need a collective determination to stay the course – “keep the faith”
- Persistence and optimism is well founded

THANK YOU



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean

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Rémi Gruet

CEO

Ocean Energy Europe

Download presentation [here](#)

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Gavin McPherson

Head of Policy and Research

Nova Innovation



Building Momentum: telling our story

Scottish Renewables Marine Energy Conference

26th September 2018

Gavin McPherson, Nova Innovation, Head of Policy and Research

NOVA
INNOVATION

Introduction

- Nova Innovation is a tidal energy technology and project developer
- We design, build, deploy and operate tidal turbines and develop tidal energy projects
- Based in Edinburgh, 35 employees
- 2016: installed the world's first offshore tidal array
- 3x Nova M100 turbines operational since 2016
- Investing in direct drive technology (TiPA, D2T2)
- Doubling array size to 6 turbines (EnFAIT) and adding energy storage (TESS)



Core product: the Nova M100 turbine

A 100kW 'plug and play' power station



Full water to wire solution

- **Invisible** – seabed-mounted, no visual or navigational impact
- **Simple** – low cost vessels; no heavy port infrastructure required
- **Modular** – container-ready for easy transport by road, rail or sea
- **Adaptable** – suitable for a wide range of site conditions – large addressable market
- **Local** – small size maximises local benefits for small vessels and onshore operations
- **TESS** – Integrated Tidal Energy Storage System

The Shetland Tidal Array: a Local Hero

- Array build: **80% UK content**
 - > Small scale device suits local UK supply chain
 - > Steel, services, components
 - > Operations phase > 90% UK content
- Array build: **25% local content**
 - > Vessels, services, blades (Shetland Composites)
 - > 30+ suppliers from Shetland and Orkney
 - > Regional impact a huge benefit for small-scale marine energy projects
- **UK content is great, but exports are better**
 - > Build a UK supply chain and export to the world
 - > Learn lessons from Danish wind ...



Lessons from wind: UK v Denmark, 2016

Country	Denmark	UK
Population	5.7 million	65.6 million
Installed wind capacity	5,476 MW	18,872 MW
Wind capacity per capita	1.0 kW/person	0.3 kW/person
Wind sector employment	32,898	14,000
Wind sector turnover	15.7 Billion EUR	7.8 Billion EUR
Wind sector exports	7.3 Billion EUR	0.3 Billion EUR
Wind exports per capita	1,280 EUR	5 EUR

UK arms exports 2016: 7.2 Billion EUR, whisky exports 4.9 Billion EUR

Graphical representation of wind exports per capita

Øresund Bridge
British Bulldog

204 m



Not actual size



0.8 m



Lessons from wind: UK v Denmark, 1990

Danish wind
in 1990



Installed capacity: **343 MW**

Mostly ~100 kW turbines, almost all Danish machines

Building first **offshore** wind farm (Vindeby, 4.95 MW)

4 major turbine manufacturers (Vestas, Bonus, Nordtank, Micon)



Source: windeurope.org

UK wind
in 1990



Installed capacity: **4.3 MW**

10 years behind Denmark

Building first **onshore** wind farm (Delabole, 4 MW)

1 major UK turbine manufacturer (Wind Energy Group)



Source: [Pam Brophy](#), CC BY-SA 2.0

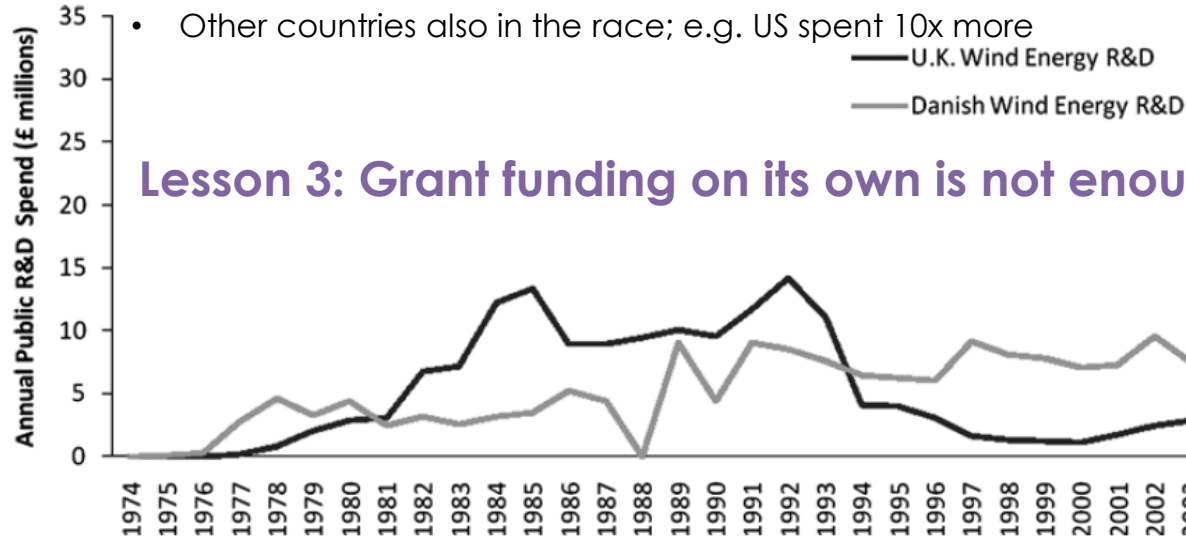
By 1990 the Danes
had built an
unassailable lead
(probably)

Lessons from Denmark
Lesson 1: Capture first
mover advantage
Lesson 2: Create a
domestic market

Lessons from wind: what support mechanism?

Grant funding?

- Denmark and UK had similar levels of grant funding
- 1980-2000: Denmark 140m EUR, UK 170m EUR
- Both focused on large-scale machines
- Other countries also in the race; e.g. US spent 10x more



Lesson 3: Grant funding on its own is not enough

Source: Aquamarine Power, 2011



630 kW Nibe B
(1980)

Nibe, Denmark

Dansk Vindteknik



3000 kW LS1 (1987)

Burgar Hill, Orkney

Wind Energy
Group

Lessons from wind: what support mechanism?



Market support?



- **1980** – 30% capital grant support for wind projects
- **1984** – Fixed price tariffs for wind energy (combined with capital grants)
- **1990** – Feed-in tariffs for wind
- **1980-90** – 26 Danish companies sold 3+ turbines
- **1992** – 12,209 turbines installed, 72% exports
- **1998** – Final UK large-scale wind turbine supplier WEG sold to Danish NEG Micon (now Vestas)
- **2000** – 700M EUR invested, 2.3 GW installed, 19TWh generated: 41 €/MWh
- **2016** – 7.3 billion EUR wind sector exports

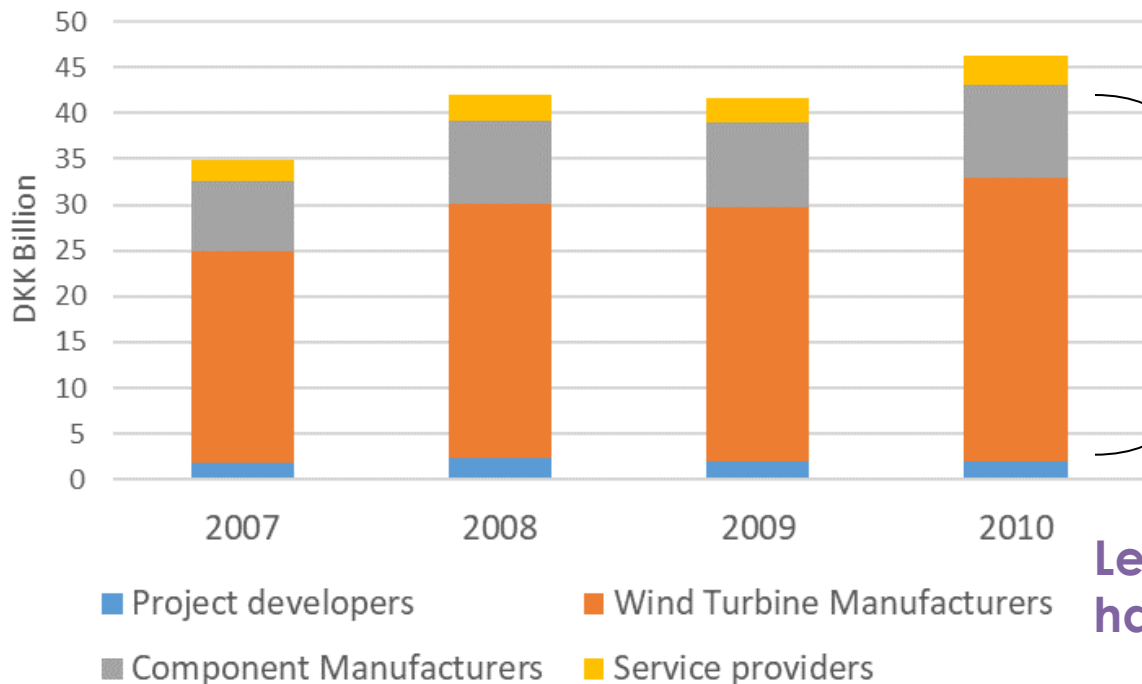
- **1990** – Non-Fossil Fuel Obligation
 - 6 years after Danish tariffs; auction not FIT
 - Seeking lowest cost; short-term deadlines; just 1 UK turbine supplier (WEG)
 - 49% of projects completed (32% by MW)
 - 83% of turbines were imported
- 'it is doubtful that another mechanism could have been more successful in supporting a foreign industry than compelling all developments to occur within a short period of time when the domestic industry is in its infancy' (UK Welsh Affairs SC 1994)*
- **2000** – 300M EUR invested, 0.4 GW installed, 4.6TWh generated: 67 €/MWh
 - **2016** – 0.3 billion EUR wind sector exports

Lesson 4: Revenue support works ...

Lesson 5: ... but the structure and timing matters (e.g. CFD)

Lessons from wind: which subsectors matter?

Danish wind exports by subsector



88% of Danish wind exports are from device developers and their supply chain

Lesson 6: For exports, hardware matters

Source: Deloitte, 2012

- Lesson 1: Capture first mover advantage
- Lesson 2: Create a domestic market
- Lesson 3: Grant funding on its own is not enough
- Lesson 4: Revenue support works ...
- Lesson 5: ... but the structure and timing matters
- Lesson 6: For exports, hardware matters

Be like



or



... you decide!

Thanks for your attention

Gavin McPherson

Head of Policy and Research
Nova Innovation

+44 (0)131 241 2000

gavin.mcpherson@novainnovation.com



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Sue Barr

Board Member, Scottish Renewables

Peter Duncan

Managing Director, Message Matters

Audrey MacIver

Director of Energy and Low Carbon, Highlands and Islands Enterprise

Rémi Gruet

CEO, Ocean Energy Europe

Gavin McPherson

Head of Policy and Research, Nova Innovation



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Lunchtime Event: Leading Europe's Marine Supply Chain Into Global Markets

Download presentation [here](#)

Innovating our way down the cost curve and delivering a route to market

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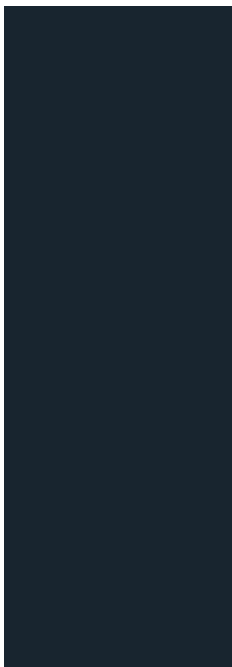


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Miriam Noonan

Financial Analyst

Offshore Renewable Energy Catapult



Scottish Renewables Marine Energy Conference

Plenary 3 - Innovating our way down the cost curve and delivering a route to market

26/09/2018

Miriam Noonan

Agenda

- Introduction to the Offshore Renewable Energy Catapult
- Our place in the industry and how we work with SMEs
- Cost reduction pathway
- Supply chain route to market
- Case study: EnFAIT

Our mission

To accelerate the creation and growth of UK companies in the ORE sector

Our vision

By 2030, ORE Catapult will be the world's leading offshore renewables technology centre

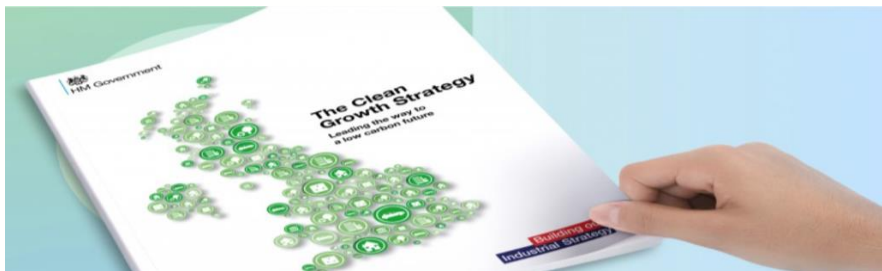
- Centres of Excellence
- Academic Research Hubs
in partnership with leading universities
- Expanding our assets in Blyth and Levenmouth
the world's foremost open-access facilities



Marine energy has been assessed against 3 key tests

- The UK government's clean growth strategy has set out three tests.

Oct 2017



1

Can we see a clear cost reduction pathway for this technology, so we can deliver low cost solutions?*

2

Can the UK develop world-leading technology in a sizeable global market?

3

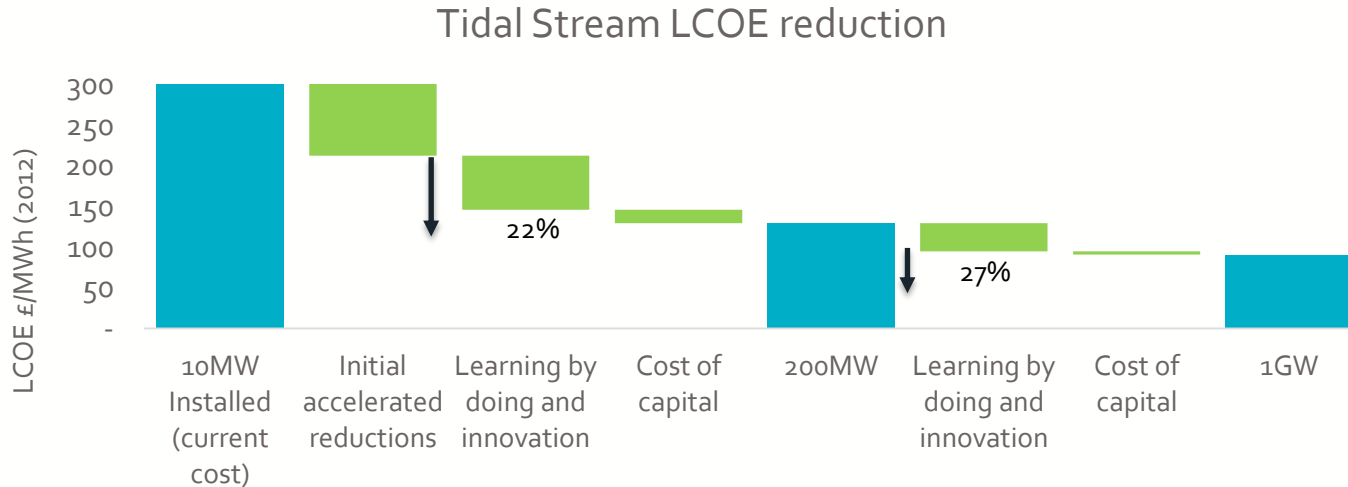
Does this deliver maximum carbon emission reduction?

- This study is assessing how the UK's Tidal Stream and Wave Energy industries can perform against these tests.

[Link to report:](#)

<https://s3-eu-west-1.amazonaws.com/media.newore.catapult/app/uploads/2018/05/04120736/Tidal-Stream-and-Wave-Energy-Cost-Reduction-and-Ind-Benefit-FINAL-v03.02.pdf>

- *Tidal stream has been assessed against all three test and wave energy against tests 2 and 3.



Initial Accelerated Reductions

- Economies of Volume
- Economies of Scale
- Accelerated Learning

Learning by Doing & Innovation

- Optimised processes & manufacturing
- Real life operational & weather data
- Collaborative shared learning

Cost of Capital

- Increase project debt
- Reduce equity risk

LCOE expressed in pre-tax real, 2012

Qualitative Study with 25 industry stakeholders covering technology developers, supply chain companies, insurers, financiers and research institutes.

Industry respondents highlighted a number of key areas where innovation is being driven through close co-operation between supply chain and project developers in order to reduce lifetime costs and improve performance and reliability.

1. Using local suppliers who understand site conditions

2. Device accessibility

3. Expertise from other industries

4. Standardisation

5. Continuous project pipeline





EnFAIT

- EnFAIT will demonstrate a grid connected tidal energy array at a real-world tidal energy site, propelling tidal energy towards competing on a commercial basis with alternative renewable sources of energy generation.
- Project commenced in July 2017 and will run until June 2022 at the Bluemull Sound site in Shetland.
- Scale up Nova's existing operational Shetland Tidal Array of 3 x 100kW devices to 6 x 100kW, allowing the delivery of real-world results from day one and building upon significant existing investment.
- EU €20.2 million flagship tidal energy project.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement number 745862.





EnFAIT

- Demonstrate the development, operation and decommissioning of the world's first tidal array of six turbines over 5 years to prove a cost reduction pathway for tidal energy and that it can be cost competitive with other forms of renewable energy.
- In a world-first, turbines will be repositioned to explore effects of array configuration on efficiency and on reducing cost of energy.
- Operation and maintenance strategies will be considered
- Computer modelling software will determine the most efficient and effective array layout.
- Generate common, fundamental learning for the wider ocean energy sector.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement number 745862.



Contact us

GLASGOW

Inovo

121 George Street
Glasgow
G1 1RD

T +44 (0)333 004 1400



BLYTH

National Renewable
Energy Centre

Offshore House
Albert Street
Blyth, Northumberland
NE24 1LZ

T +44 (0)1670 359 555



LEVENMOUTH

Fife Renewables

Innovation Centre (FRIC)

Ajax Way
Leven
KY8 3RS

T +44 (0)1670 359 555



HULL

O&M Centre of Excellence

Ergo Centre
Bridgehead Business Park
Meadow Road, Hessle
HU13 0GD



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Louise Dalton

Senior Associate

CMS

Your World First

C/M/S/

Law . Tax

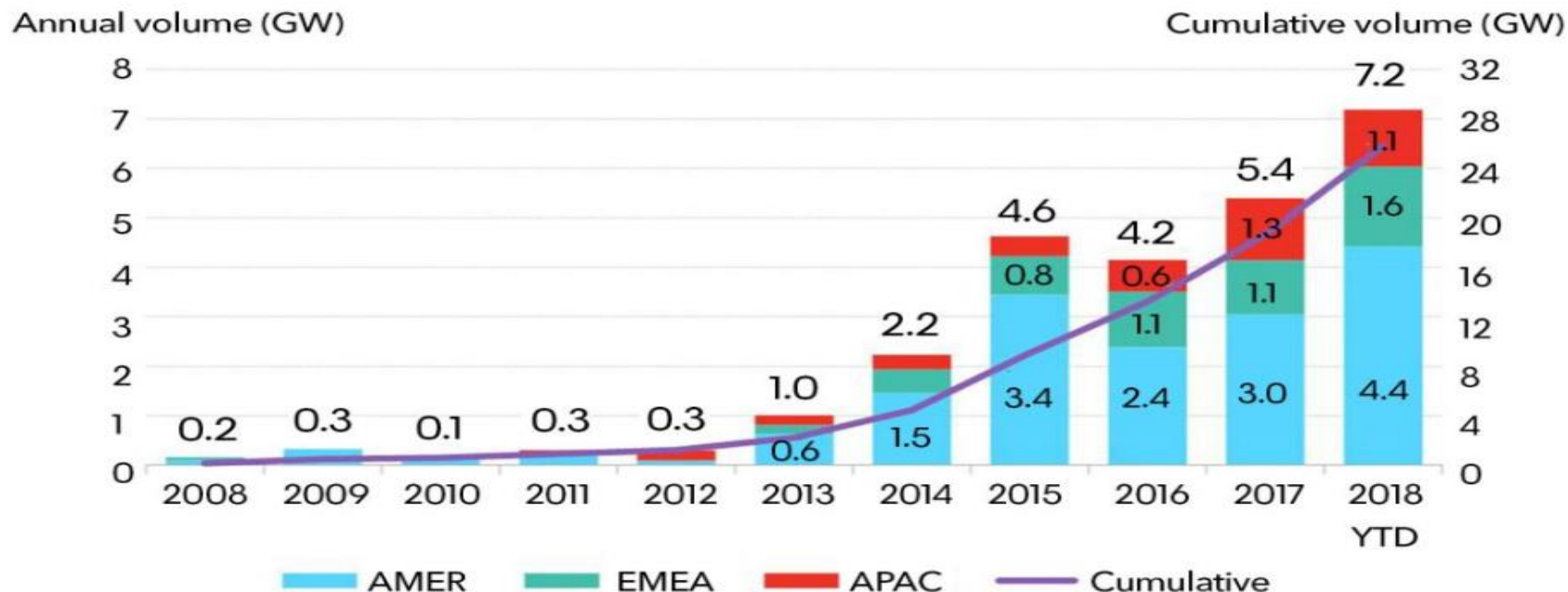
Corporate PPAs

Louise Dalton, Senior Associate, CMS



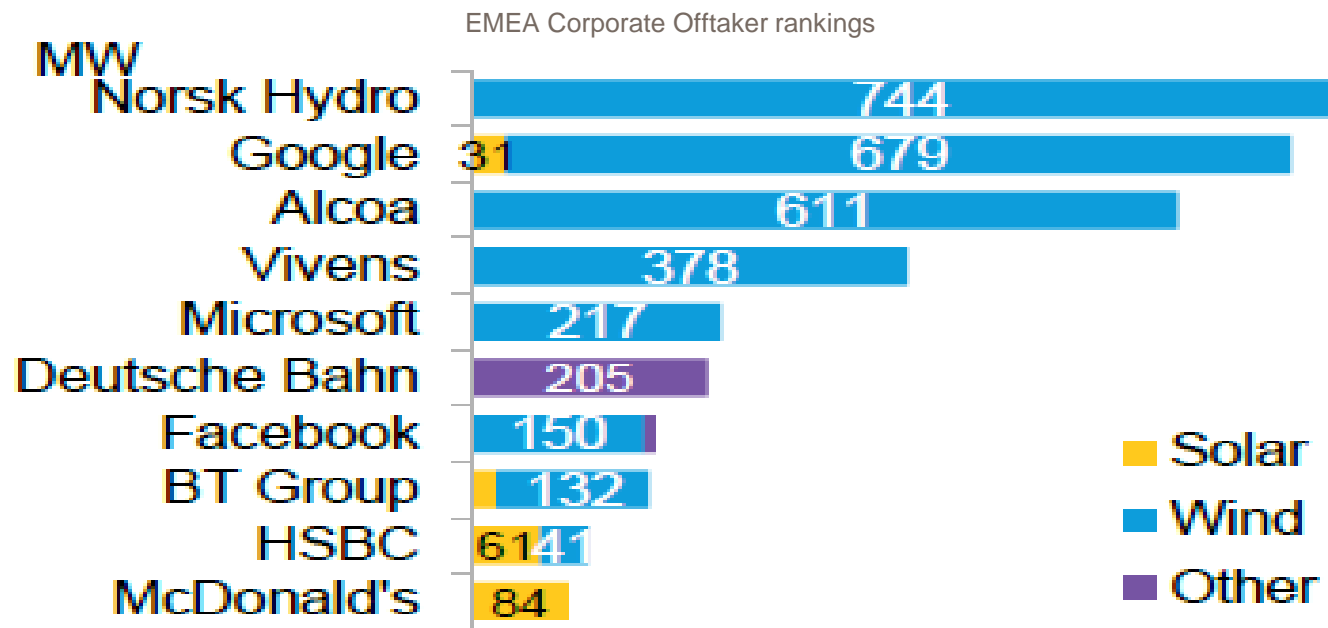
Global volume of Corporate PPAs

Global corporate PPA volumes, by region



Source: Bloomberg NEF. Note: Data is through July 2018. Onsite PPAs not included. APAC number is an estimate. Pre-market reform Mexico PPAs are not included. These figures are subject to change and may be updated as more information is made available.

European Corporate PPA market



Source: Bloomberg New Energy Finance

Corporate PPAs: Key issues

Parties

Structure

Pricing

Development
risk

Volume

Performance

Credit support

Change in law

Force majeure

Termination

Information
obligations

Boilerplate

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Jonathan Hodges

Senior Innovation Engineer

Wave Energy Scotland

Wave Energy Scotland

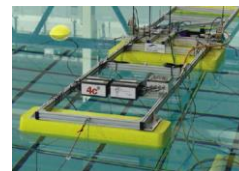
Research, Development and Innovation



Jonathan Hodges – Senior Innovation Engineer
Scottish Renewables Marine Conference 2018

Contents

- Wave Energy Scotland
- Work programme
- Supporting technology
- Innovation opportunities
- Next steps for the WES programme

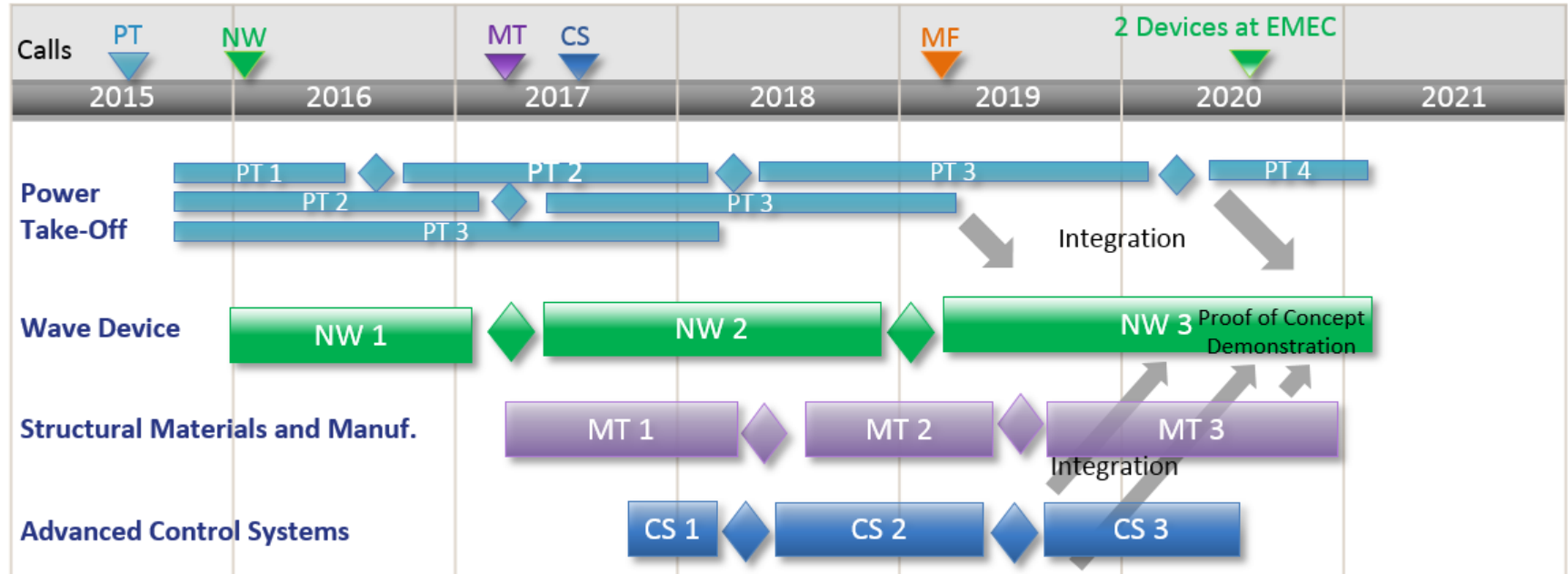


Wave Energy Scotland



- Funded by the Scottish Government
- Established in Nov 2014 as a subsidiary of HIE
- Develop cost competitive wave technology
- Deliver objectives through a Research, Development and Innovation Programme
- Four competitive programmes, Device, PTO, Controls, Materials
- 177 Organisations
- £30.9m committed expenditure
- 84 Contracts
- 13 countries

WES Technology Work Programme



Supporting technology

- Competition and collaboration
- Integration support
- Standardisation
 - Standards development
 - Metrics
- Structured Innovation
 - Tool development - DTOceanPLUS



UMBRA GROUP

PTO



THE UNIVERSITY OF EDINBURGH
School of Engineering



ECOSSE
Subsea Systems
An Evershree International, Inc. Company



Device



Seeking innovation

Seeking further step-change LCOE reductions....

- Supporting Infrastructure

Electrical Connection



Moorings & Foundations



- Next generation technologies

Very Large Scale



Alternative Technologies



Next steps

Questions?



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Andrew Smith
Managing Director
Deja Blue Consulting

SR Marine Conference 2018

Innovating our way down the cost curve and delivering a route to market

An investment perspective



Deja Blue Consulting

- Preparing for and executing fund raising
- Contributing to the Development of EU Fund Design
- Structure and close the financing of projects
- Associates of Greenbackers Investment Capital who are cleantech investment specialists and represent an SEIS/EIS fund
- Running bespoke pitching events
- Non exec and board roles e.g. Our Community Energy Chairman

How wave & tidal technologies might reduce costs

- Marcella Askew, Seabased: “There’s nothing more exciting than working in an industry that does not exist. and you can save the world at the same time.
- “If I was going to have a challenge I would say R&D needs to start talking to commercial from day one, and commercial needs to figure out how to talk to R&D and respect their answers. If we have more of this, things could move a bit faster.”
- step changes not gliding down a cost curve
- deployment, recovery, maintenance
- collaboration, consolidation, look around – is your space crowded?
- If you are developing a technology really think about what is new about what you are doing – do you need to spend time, effort and money on a bespoke element if a tried and tested one (and thus a bankable one) already exists

The cost curve outlook

- why is it important to talk about the cost curve? is it important from an investor perspective?
- are we falling into a trap? cost of capital as a factor;
- £57.50! Offshore wind for 2022/23
- a halving in price in just over 2 years ...
- a multi-billion pound industry with great benefits for the UK supply chain
- a new, homegrown industry with manufacturing, jobs and profits all retained in UK and with the knowledge and expertise anchored here which can become a strong, post brexit, high growth, exporting industry ? well NO – all of that was lost to UK when we failed to carry on supporting the development of the turbines just a few short years ago.....
- what can we learn from that the next 2 big off shore technology sectors that will dominate the energy business worldwide are happening right here off the UK coast – floating wind and tidal energy and the third, the much larger but harder to crack wave sector is “anchored” here too! But not for much longer

Revenue opportunities in a smart, flexible energy system

- what are you selling? hybrid? electricity? solutions?
- think about communities as a positive source of funding, support, shared ownership as a key part of a really good narrative that will benefit from delivering on policy objectives
- play the “blue” card
- sustainable islands
- collaboration
- the Blue Economy

Conclusions

- Collaborate
- Communities
- Preparation
- Datarooms
- Identify risks, look at them from an equity & banking (debt) perspective, mitigate them, allocate them
- If you are funding a project – make it bankable – seabed, cable, grid, consenting, contracting, solve the problems before you ask for £ - if you don't you won't get £ and you will lose credibility
- Engage early with supply chain – how it's manufactured, to be deployed and recovered and maintained should inform design decisions



Andrew Smith

Deja Blue Consulting

+44 (0)7947 722057

andrew.smith@dejablueconsulting.com

www.dejablueconsulting.com



Ocean Energy
Europe

Sue Barr

Board Member, Scottish Renewables

Miriam Noonan

Financial Analyst, Offshore Renewable Energy Catapult

Louise Dalton

Senior Associate, CMS

Jonathan Hodges

Senior Innovation Engineer, Wave Energy Scotland

Andrew Smith

Managing Director, Deja Blue Consulting



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Hannah Smith

Senior Policy Manager, Scottish Renewables

Sian Wilson

Senior Development Manager, Crown Estate Scotland

Cameron Smith

Director, SIMEC Atlantis

Andrew Scott

Chief Executive Officer, Scotrenewables Tidal Power

Richard Yemm

Director, Quoceant

Patricia Hawthorn

Partner, Shepherd + Wedderburn LLP



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