



# Developing the wave and tidal supply chain

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**2<sup>nd</sup> March 2011**

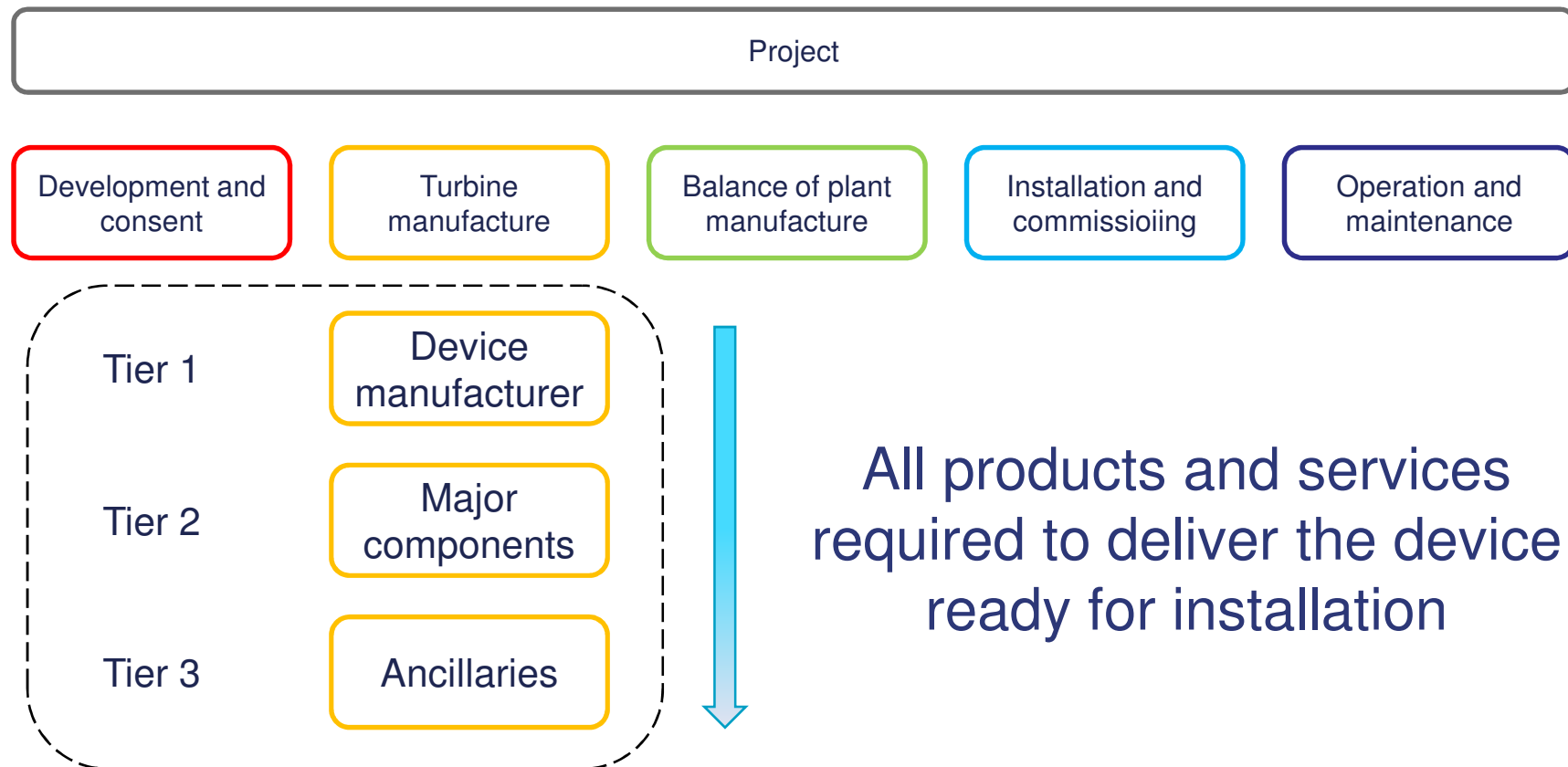
## Purpose

To raise awareness of potential supply chain challenges in moving towards a GW scale industry from one of individual device development

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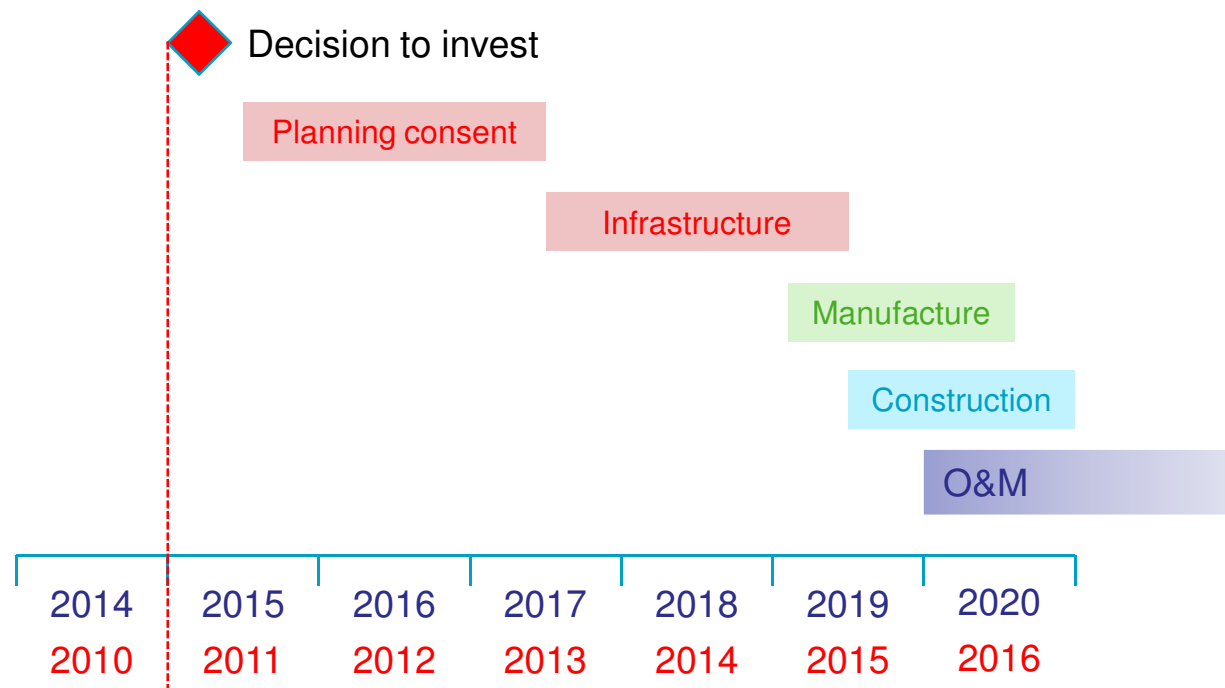
- Supply chain overview
- Commercial projects
- Challenges of delivery
- Key requirements
- Supply chain readiness
- Who will succeed

## What is a supply chain



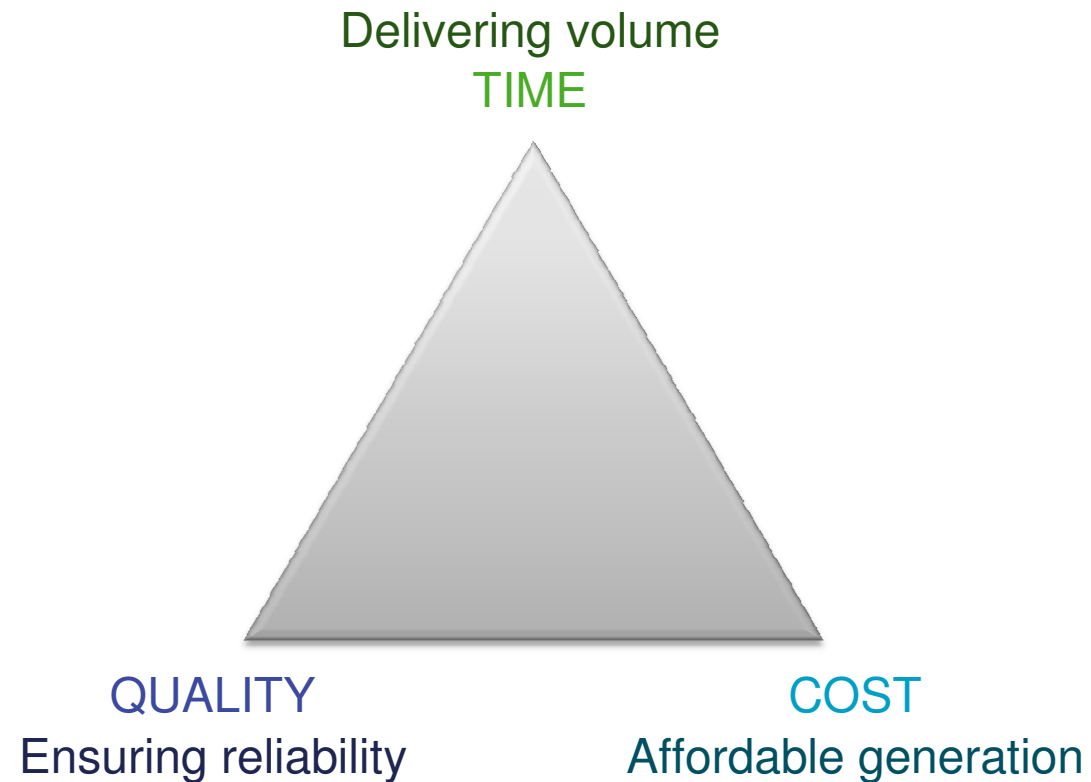
## Commercial project

- 100MW project delivered in 2020



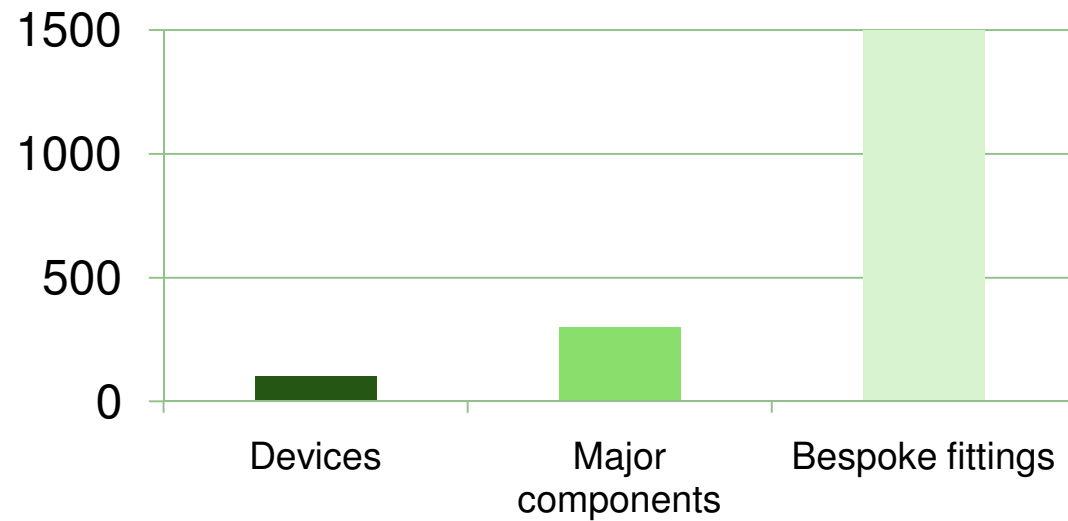
- 30MW in 2016 – do we have the infrastructure for this?

## Challenges of commercial delivery



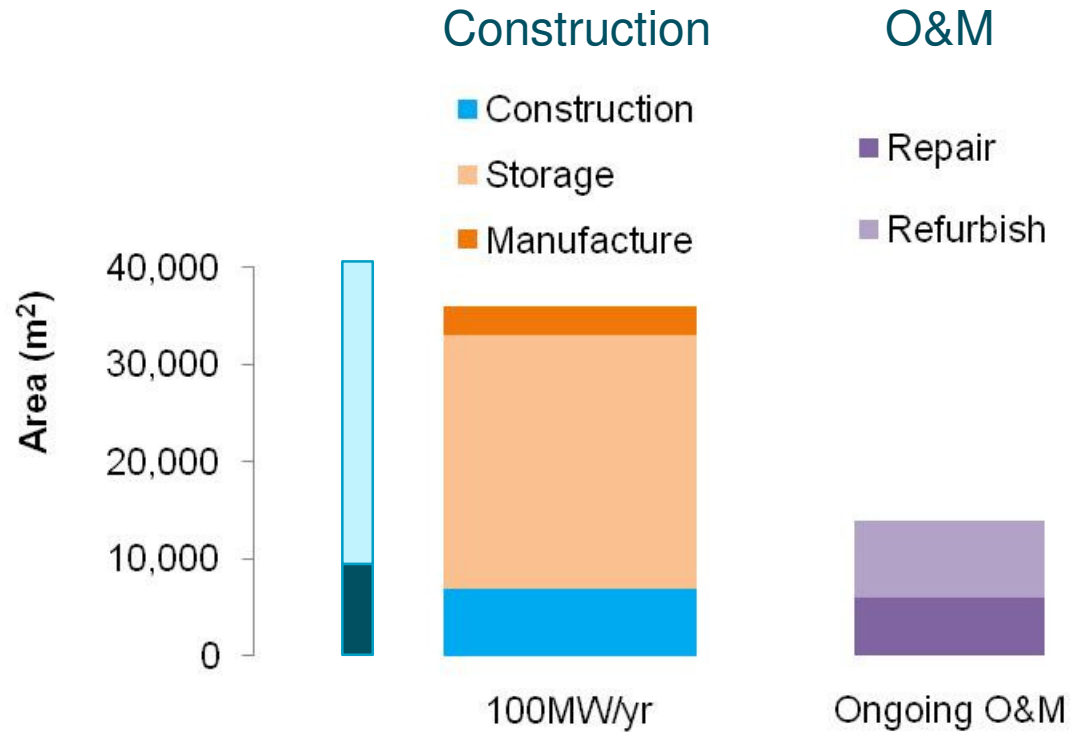
## Device manufacture

- Assume 100MW per annum



- Is supply of key components secure?
  - How many suppliers – single point or several
  - Commodity issues – prices and availability
- Economies of scale maximised?

## Construction & O&M



- Scrabster extension has around 1Ha quayside and 3Ha industrial space



## Supply chain readiness

- Understanding
  - Know what you will be producing in 2016 and beyond
  - Move towards scale manufacture and end-to-end production methods in principle during design
  - Identify the global opportunity
- Capacity
  - Suppliers must be able to move from 1 per annum to 100+ output
  - Retain experience gained to date
  - Plan for maximum efficiency in production with room to meet future demand
- Investment
  - To produce quality, to budget and on time
  - In suitable locations and facilities
  - In sufficient time to maintain competitive advantage



## Who will succeed

The most innovative device that maximises energy capture

OR

The suppliers able to deliver at scale,  
willing to invest to meet future demand,  
focused on a worldwide market  
and  
prepared to constantly push prices down

# Thank you

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