

- Research and analysis
- Strategic advisory
- Transactions
- Publications



Douglas-Westwood is an independent employee-owned company and the leading provider of business research and strategy services to players in the global energy industries. Our work in renewable energy has spanned all key generation sectors including onshore wind, biomass, solar PV and geothermal. Particular expertise has been developed within the area of marine renewables including offshore wind, wave and tidal current stream. We provide four complementary services:

**Research and analysis:** over the years we have built a comprehensive knowledge base of renewable energy sectors and major players. Our databases of global renewables projects are constantly updated in order to capture areas including market mechanisms, major acquisitions and emerging technologies. Excellence in this area informs all of DW's service offerings, allowing us to rapidly identify and justify market insights.

**Strategic advisory:** we work closely with our clients as part of their strategic planning processes in order to develop and test competitive strategies for new products, new business streams and acquisitions. We qualify our strategies through a combination of structured industry consultation and detailed market modelling.

**Transactions:** market and commercial due diligence as part of financial transactions is one of our primary activities. We provide services to both buyers and sellers of companies in the energy services sector and have provided services to a range of global clients on refinancing, M&A deals and IPOs ranging from \$10 million to \$1 billion.

**Publications:** our published market studies give us a wealth of information regarding market dynamics and trends across the renewable energy sectors. Each publication covers market development, technology, major players, key markets and concludes with a five-year forecast by region and industry sub-sector.

energy business advisors

### Examples of DW's work in the sector include:

**Wind turbine manufacturing (Germany):** commercial due diligence for a 100 million euro investment into the creation of a new European wind turbine manufacturer. Diligence included market forecasting, supply chain survey & analysis and management review.

**Building an offshore wind industry (UK):** development of scenarios for UK offshore wind installation from 2015 to 2030 and analysis of resultant requirements for hardware and installation services. Policy recommendations were made with the aim of maximising UK economic benefits.

**Offshore wind assessment (Norway):** a major strategic review including assessment of the European power sector, supply and demand modelling and cost analysis. A cost-benefit analysis was performed which considered the export of offshore wind generated power to neighbouring countries and development potential of NCS resources.

**Port development (UK):** DW worked with a regional development organisation to assess plans to develop a port for construction and operational services to a major offshore wind farm. Additional analysis of future offshore wind projects was undertaken to determine long-term benefits to the region.

**Offshore wind foundations (Germany):** working on behalf of a foundation manufacturer, DW were engaged to analyse potential competitors and suitable manufacturing locations for advanced tripod and jacket offshore wind turbine foundations.

**2020 targets & constraints (UK):** a major strategic study for a government department. DW analysed each renewable electricity generating sector to establish the key factors preventing the UK from reaching challenging 2020 targets. This work included intensive supply chain analysis, domestic capability mapping and assessment of economic benefits.

**Service vessel market (the Netherlands):** detailed market review including coverage of drivers, detailed forecasts, timing of new projects, vessel supply & demand modelling, competitive landscape and industry consultation.

*“ One of the few firms which has a professional approach to the economic aspects of the renewable energy industry ”*

- Councillor to the European Commission

### Clients include:

BBP Regeneration	Research Council of Norway
Bechtel	RenewablesUK
Blue Ocean Projects	Scottish Enterprise
Ethemba Capital	Siemens
European Commission	Smit
Halcrow Group	SSE
Hochtief	Swan Turbines
JDR Cable Systems	TAG
Lloyds Development Capital	UK Government
MPSE	Vestas
Oceanlinx	Vision Capital
Parsons Brinckerhoff	Weserwind
P&O Maritime Services	Windcat Workboats

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