

New edition

The World Wave & Tidal Market Report by energy industry analysts Douglas-Westwood is now in its second edition. The report focuses on the current and future prospects, technologies and markets for the wave and tidal current stream sectors.

In common with Douglas-Westwood's other reports, it is aimed at executive readers and does not assume detailed technical knowledge of the subject.

An emerging industry

The first commercial wave and tidal current stream projects are now appearing online and forecast expenditure for the 2011-2015 period is \$1.2 billion. Key countries such as the UK have put into place greater financial support and site development legislation to help the first commercial projects progress. This emerging industry offers potential to investors seeking to build or expand their renewable portfolio, as well as supply chain companies looking for new markets.

Technology review

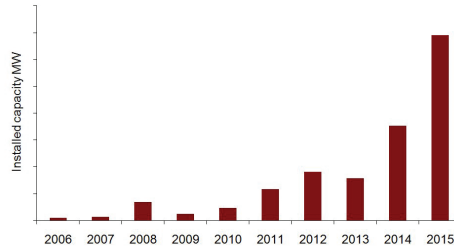
The World Wave & Tidal Market Report provides a comprehensive and fully illustrated review of different technological concepts and devices employed in both existing and future projects. The report provides analysis of the impact of current and new technologies on the industry and identifies the key players in the business.

Industry issues

With the sector still young, there are significant issues that must be addressed and overcome. The report analyses and assesses potential solutions to issues such as costs, installation, operations & maintenance and investment.

Key markets

Individual countries must have appropriate legislation and market mechanisms in place to allow development of wave and tidal projects. For each active country the report



Installed capacity MW – total per year

presents the market drivers, legislation, financial incentives and issues that aim to boost project development.

Unique market forecasts

Using the same in-depth modeling process that is adopted for other reports in this series, the report presents worldwide market forecasts for both sectors for the 2011-2015 period. Five years historic data is included for comparison.

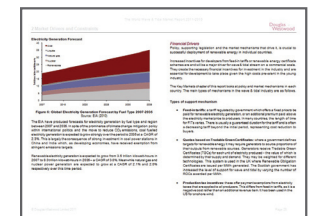
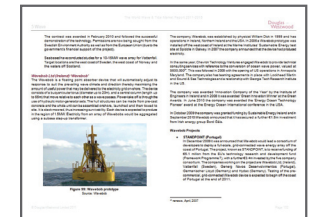
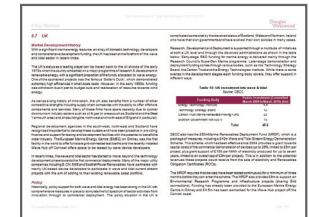
Douglas-Westwood has been tracking the sector since 2000 and has an in-house database covering all projects worldwide, which this report draws directly from. Each proposed wave & tidal current stream project worldwide is assessed to model unique and detailed market information.

An acclaimed series

The report is the latest in an acclaimed series of business studies used by organisations worldwide, including the oil majors, investment banks, offshore contractors, agencies and departments of governments.

The authors

Douglas-Westwood is a leading provider of business research and analysis and has completed over 600 projects to date for 400 clients based in over 70 countries. In the past three years the company has undertaken market due diligence on M&A financial deals totaling more than \$15 billion.



- Prospects
- Technologies
- Markets

Contents

- **Executive Summary** - summary of market forecasts, macro trends, industry challenges.
- **Market Drivers and Constraints** - green drivers, macro energy drivers.
- **Introduction to the Wave & Tidal Industry** - development history, technology development, R&D, test sites, manufacturing, components.
- **Project Lifecycle** - pre-installation surveys, engineering surveys, environmental surveys, device installation, cable installation, grid connection, operations & maintenance.
- **Wave** - available resource, development history, classification of devices and technology overview, wave energy devices.
- **Tidal Current Stream** - available resource, development history, classification of devices and technology overview, tidal current stream energy devices.
- **Market Issues** - R&D and test sites by country, manufacturing, components, pre-installation, installation, operations and maintenance, costs, financing, survival, grid connection.
- **Key Markets** - market types, Australia, Canada, China, Denmark, Finland, France, Ireland, Korea, New Zealand, Norway, Portugal, Spain, Sweden, UK, USA.
- **Market Forecasts** - capacity, capital expenditure and numbers of devices for wave and tidal current stream.

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

- Councillor to the European Union

“ Excellent report, very comprehensive and well laid out ”

- Vestas

“ Douglas-Westwood are the study experts ”

- Energy Company

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