

Wind sector overview

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The Market...



Market Overview

- ERET supports large scale wind development
- Largely satisfied in the early years with capacity spare in 2013+
- ETS?
- REC and Power prices languishing



Procurement lifecycle

Project Lifecycle

- Development
 - The assessment of suitable sites culminating in Planning Permission and a business case
- Delivery
 - The execution of procurement contracts and construction of the wind farm
- Operations
 - The maintenance of the asset for its lifetime

Development

- **Initial**

- Macro site assessment
- Landowner agreements
- Installation of met masts

- **Detailed**

- Planning studies – Visual, Noise, Cultural, EMI, Environmental, Avifauna,
- Detailed siting assessment – Constructability, micrositing, energy yields
- Potential turbine suppliers
- Connection studies

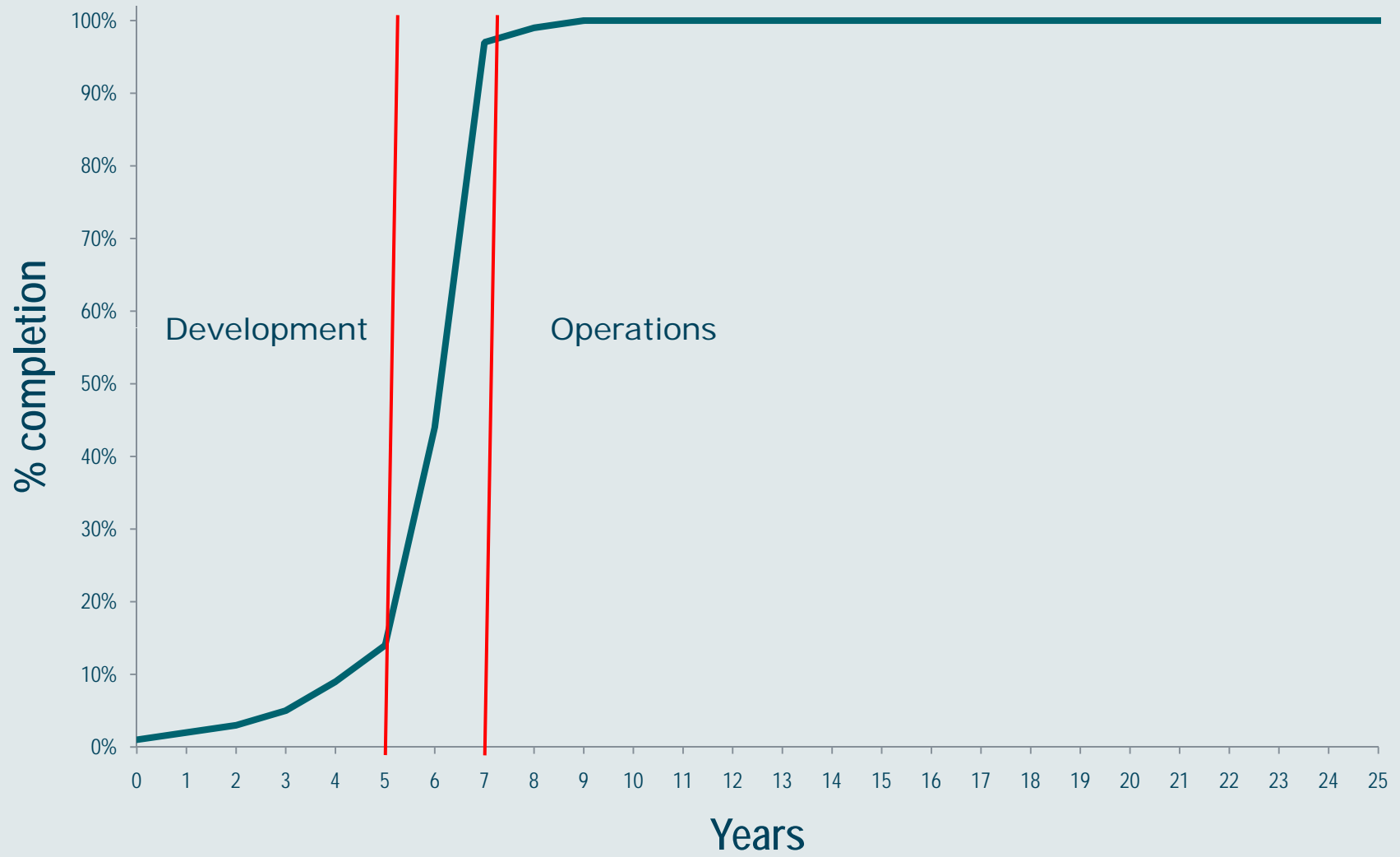
Delivery

- Engagement of contractors to conduct the works
 - Turbine Supply
 - Civil and electrical infrastructure (Balance of Plant)
 - Transmission
- Construction of the asset
- Testing and commissioning
- Generation

Operations

- Ensuring plant is maintained to deliver its predicted yield for the life of the farm
- Can involve extended manufacturer warranty and maintenance agreements

Project Lifecycle



Opportunities

Opportunities for SME's

- In Development
 - Specialist reporting supporting site assessment or Planning Approvals (Visual, enviro, mapping..)
- In Delivery
 - Support to BoP contractors for minor works
 - Crane pack sub-supply
- In Operations
 - O&M service provision (specialist machining, labour..)

The Players

- Balance of Plant
 - Keppel Prince, Abi Group, Leightons, Consolidated Power Projects, Built Environs, ABB, Downer, MacDow, Ward, AECOM, Downer
- Turbine Supply
 - Vestas, Suzlon, RePower, Siemens, GE, Acciona, Enercon, Chinese market entries
- Specialists
 - Senergy/Econnect, URS, SKM, Garrad Hassan, PB Power, Aecom, Hydro Tas Consulting / Entura, Transfield (O&M).

Thank You

