SOUTH WEST
MARINE
ENERGY
PARK

Outlook and statement of ambition to 2030

May 2015

Contents

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SOUTH WEST MARINE ENERGY PARK

South West England was designated as the UK's first marine energy park in 2012, giving it priority focus for the development and deployment of marine energy technologies. Alongside the designation the South West Marine Energy Park partnership has been established to bring together industry, public sector, Local Enterprise Partnerships and academic organisations to work with with national and international partners to promote and accelerate the commercialisation of the marine energy sector.

"The South West's marine energy potential is significant both in terms of resource and supply chain capabilities. This important paper sets out the South West's ambition, and its vision for the future on which we look forward to working pro-actively with our partners and stakeholders." – Peter Kydd Chair, South West Marine Energy Park

1 Introduction and context

1.1 South West England's Strategic Ambition for Marine Energy

In the decade since the world's first full scale tidal turbine was deployed off north Devon, South West England has invested over £100m to support technology development and innovation in the marine energy sector. This investment in assets such as FaBTest and Wave Hub, coupled with the region's natural resources, universities, maritime and engineering skills base and innovation led companies, has established South West England as an international centre for the industry.

While the period of technology development and demonstration continues, the regional partners of the South West Marine Energy Park, are now looking ahead to the next decade when we expect to see the expansion and commercial development of the marine energy sector in both the UK and overseas.

Looking out to 2030, this paper sets out the longer term opportunities and ambition for the development of marine energy in South West England. The paper is deliberately forward looking and, while recognising that the industry is in the process of overcoming a number of challenges to reach commercial maturity, reflects the strong belief that marine energy will have a key role to play in meeting the world's need for low carbon energy. The intention is that the timescales and rate of deployment outlined in this paper should be sufficiently ambitious but realistic and achievable to provide a reference against which progress can be measured.

Although the statement of ambition focuses on the potential to deploy wind, wave and tidal energy projects in the Bristol Channel and waters off Cornwall and the south west peninsula, it also sets out the wider ambition of the South West Marine Energy Park partnership to create jobs and economic value for the region, invest in people and businesses, and to be an exemplar in balancing the development of renewable energy with the protection of the marine environment and wider benefit of communities and stakeholders. The statement of ambition also places South West England within the context of the overall ambition of the UK to develop a global industry. In practice that means reflecting our ambition to collaborate with government and national bodies and with other UK and European regions with a shared interest in marine energy.

Highlights in the statement of ambition include:

- Successful deployment of demonstration arrays at Wave Hub will lead to the first commercial wave farms by 2025, and 300-500 MW by 2030 leading to 1–2GW in the following decade
- Smaller tidal stream arrays and demonstration projects at the North Devon Demonstration Zone and sites in the Bristol Channel and off Portland leading to 100-200 MW by 2030
- Potentially two tidal range lagoons off Somerset by 2030 with a capacity of up to 4 GW
- The expansion of our core marine capability into new markets and the application of "BlueTech" technologies and the marine sciences
- High value job and career growth in marine energy from circa 450 today to 3000 by 2030 plus significant additional jobs in construction and the wider marine industries

1.2 The UK's Competitive Advantage in Marine Energy

Investment in research and technology development, superb resources and facilities backed by world class innovation in marine technologies has put the UK at the forefront of the development of marine renewable energy technology.

If successfully brought to commercialisation wave and tidal renewable energy has the resource potential to generate 70 TWh per year[1] of renewable energy in the UK to supply 20% of the nation's electricity while avoiding 30 million tonnes of CO2 emissions each year.

It is estimated that there are around 1,700 people[2] working in the UK wave and tidal sectors with nearly £450 million[2] spent to date in the UK supply chain. This could grow to over 20,000[2] skilled jobs in the next decade. Leadership in the sector could enable the export technology and services into a global market which could contribute around £4 billion[2] cumulatively to UK GDP by 2050.

The UK's Competitive Advantage in Marine Energy

Marine energy has already delivered economic value to UK regions and commercial value to UK companies. If brought to commercial maturity marine energy has the potential to create thousands of high value jobs in areas of technology development, professional services, marine engineering, operations and manufacturing.

International markets are now emerging in Europe, USA and Canada, and in Asia where the appetite for marine technology is greatest in Japan, Korea and China. While this creates competition for UK based companies, the globalisation of marine energy has opened up a much wider market opportunity for both export and inward investment.

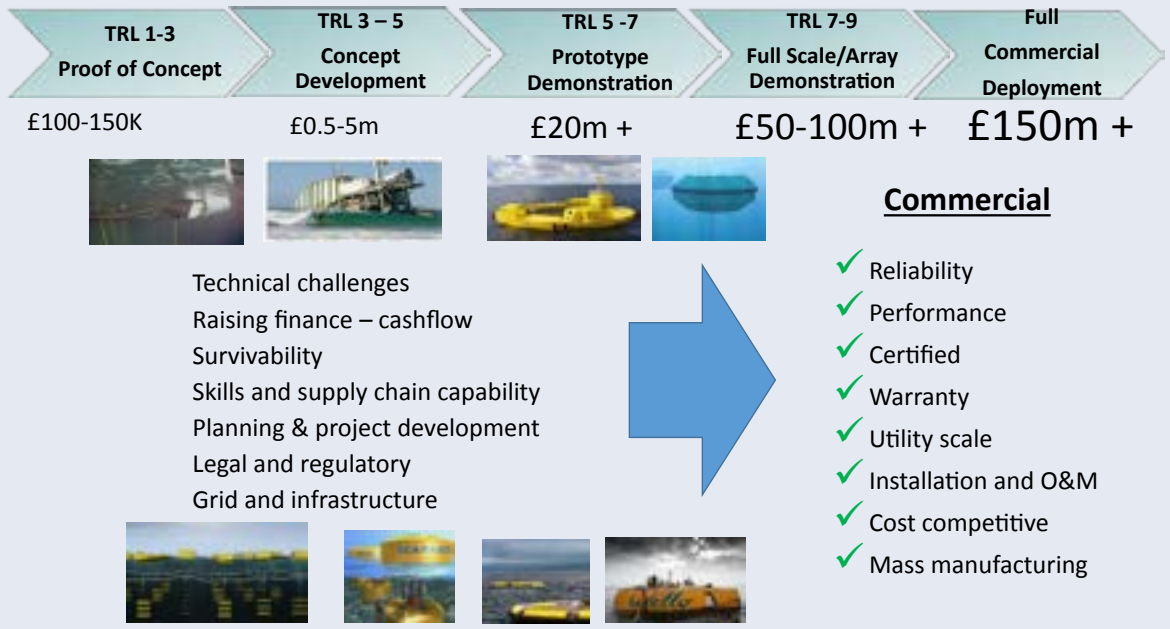
"Cornwall has a long and proud marine heritage, our ambition now is to exploit our marine energy resources and grow our supply chain to establish Cornwall as a world leading centre for marine energy technology development" – Julian German, Cornwall Council

1 Carbon Trust 2011 Accelerating Marine Energy
2 Wave and Tidal Energy in the UK: Capitalising on Capability, A report for the Marine Energy Programme Board FEBRUARY 2015

1.3 The industry must overcome difficult commercialisation challenges

Despite its high profile and global potential it is recognised that marine energy is still at an early stage of commercial development and requires a significant level of market support and enabling finance.

Road to commercial technology



As well as overcoming technical challenges the most pressing challenge for the industry is to raise finance. Although the UK offers an attractive revenue subsidy, capital support is also needed to overcome the cost and risk barriers that are typical of early stage technology projects.

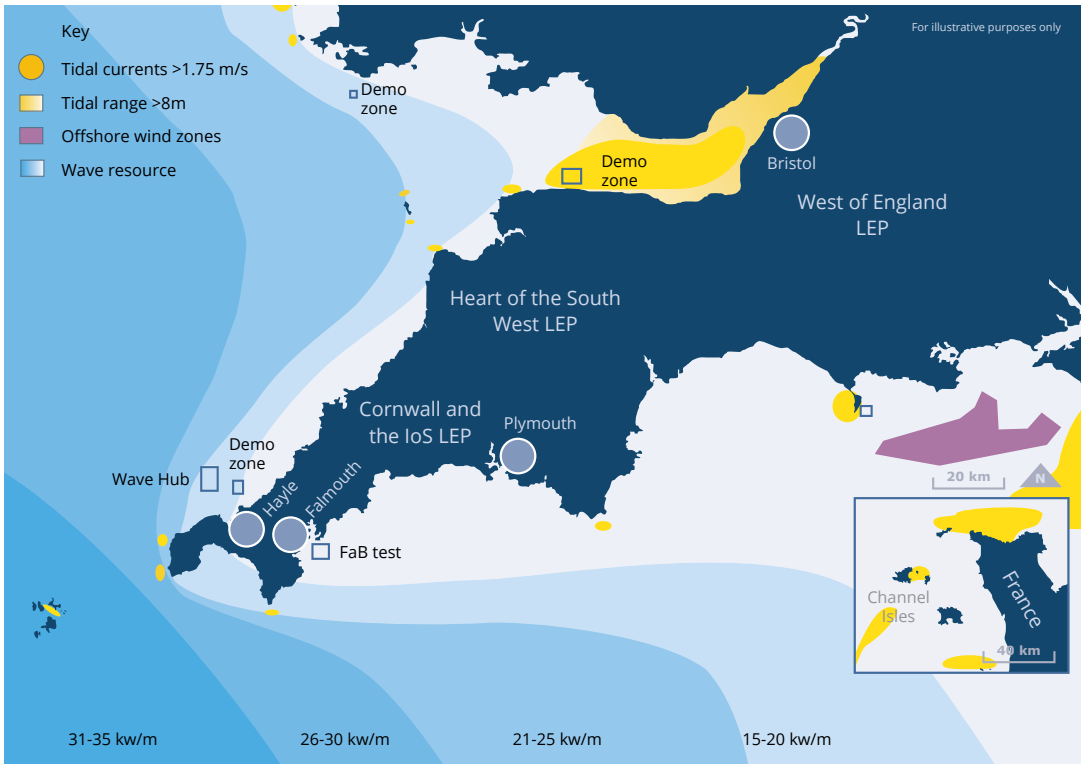
In response to these challenges the UK **Marine Energy Programme Board** has asked the UK government to work with industry and regional partners to look again at the policy and financial support offered to the industry. As well as a review of future market support the MEPB has recommended a number of key actions to support the sector including:

- Setting out a clear strategy and commitment to offshore renewables beyond 2020
- A UK wide programme to support technology innovation and commercialisation
- Support for the deployment of full scale device and demonstration arrays utilising the infrastructure which is being provided at the UK's demonstration sites
- A public/private financial model to provide enabling finance in the form of grants, shared equity, regional co-investment and underwritten debt (performance guarantees or warranties) to enable pilot commercial projects to be deployed

2 South West England – a natural home for marine energy

2.1 For over a decade the south west has been at the forefront of the marine energy sector. It's a natural industry for us, fantastic energy resource – wind, wave and tidal, deep marine and engineering capability, research and academic excellence and passion and commitment to the marine environment

South West Marine Energy Park



2.2 In the past decade the South West has invested over £100m to support the development of the marine energy sector.

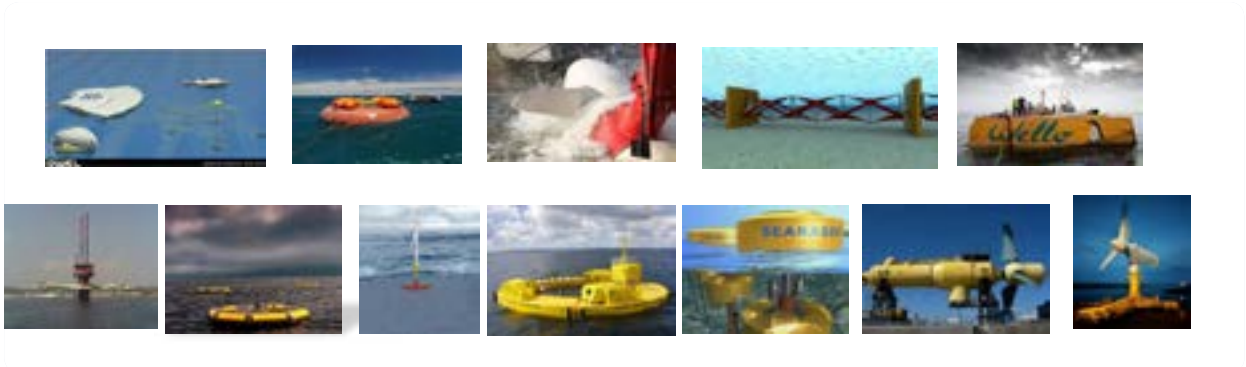
- Over £100m has been invested in test facilities including Wave Hub, FabTest and COAST
- Steady stream of technology developers coming to the region to take advantage of R&D facilities
- University research is vibrant with PRIMaRE forming the basis of a collaborative partnership across the region
- Fantastic supply chain companies operating across the UK and overseas
- Bristol has leading tidal technology developers and a cluster of consultancy and professional services
- Region as been designated as the UK's first Marine Energy Park raising regional profile

2.3 **Much of that investment has been targeted at assets to support technology development and innovation, establishing the south west as a centre for research and development and the marine sciences.**

Key Investments

- **Wave Hub** – the world's largest offshore marine test facility
- **FabTest** – Nursery and scale test site
- **COAST Lab**. – wave & tidal test tank
- **PRIMaRE** – Partnership for Research in Marine Renewable Energy
- **DMAC, SWMFT** and other test facilities
- **National Composites Centre**
- **Funding programmes** for R&D, business growth and technology developers

2.4 **Investment from the public and academic sectors has been matched by the private sector. The south west is now home to world leading technology developers and their supply chain partners.**



Bristol has become a centre for tidal technology development with Marine Current Turbines, Alstom, Atlantis and a large number of technology specialists and consultancy firms based in the city region.

Further down the peninsula in Plymouth and Cornwall the research and demonstration facilities are attracting UK and international wave and tidal developers such as Wello, Carnegie, Seabased, Simply Blue, Seatricity, Searaser, OWEL and Tocardo.

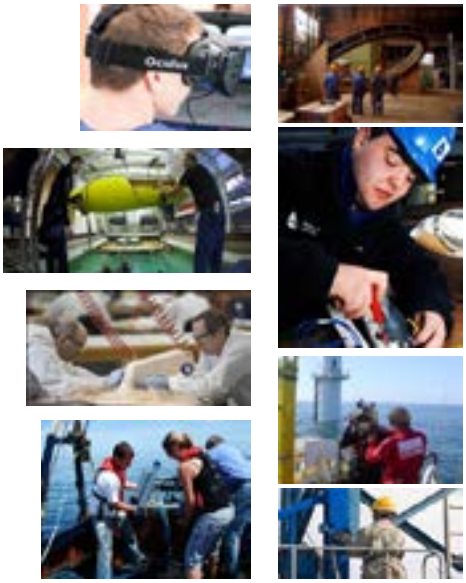
2.5 **South West England's marine engineering, consultancy and manufacturing companies are active across the sector, bringing innovative solutions to drive down costs and support the commercialisation of the sector.**

Areas of expertise and capability

- Marine & sub-sea operations
- Marine engineering and fabrication
- Design engineering
- 'Blue Tech' marine industries
- Remote and autonomous vehicles
- Electronics and communications
- Marine ICT and data analysis
- Advanced manufacturing
- Aerospace and composites
- Electrical, hydraulics and power systems
- Environmental sciences
- Consultancy and support services

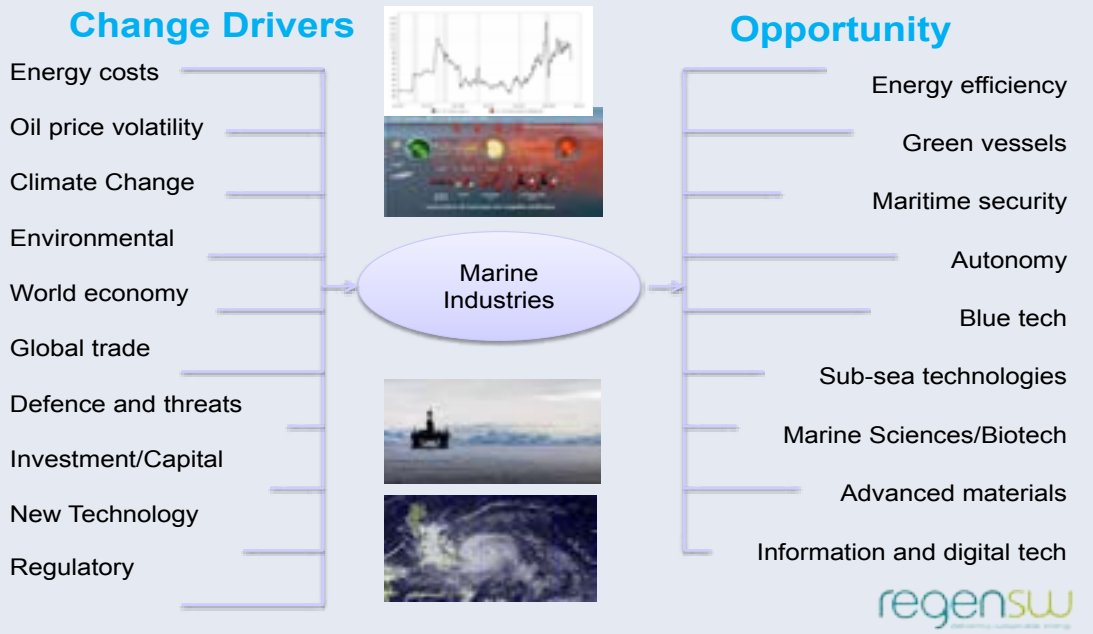
2.6 **The focus on wave and tidal energy R&D and innovation, supported by public and private investment, has already directly created over 450 high skilled jobs in the region with many more in the wider supply chain.**

- Design/Consultant Engineers
- Electrical and Mechanical Engineers
- O&M Technicians
- Composites
- ICT professionals
- Environmental experts
- Health and Safety
- Project/Construction Managers
- Marine and subsea Operations
- Maritime and offshore qualifications
- Manufacturing – fabrication, hydraulics
- Professional services



2.7 The development of marine energy technology is part of a wider strategy to position South West England at the forefront of the new 'Blue Economy', and realise the ambition to transform our core marine industry and science capability to generate new growth and a cluster of "blue tech" innovation.

South west based companies and research organisations are already targeting the anticipated growth in new 'blue tech' marine technologies and the application of marine sciences as the global marine industry undergoes a period of change and innovation.



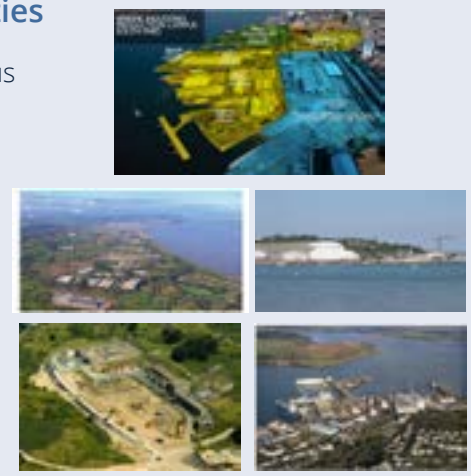
"The Local Enterprise Partnership and our partners in Cornwall Council are committed to support the development and deployment of marine energy technology over the next decade, whether it is providing investment and financial support, or ensuring that we have the infrastructure, skills and supply chain available to support commercial projects."
– Sandra Rothwell, Cornwall and Isles of Scilly LEP

2.8 The south west based Local Enterprise Partnerships (West of England, Heart of South West and Cornwall and Isles of Scilly) have identified marine energy and the wider marine industries as priority areas for growth and investment.

Major investment opportunities include the development of a Marine Industries Production Campus across the south west, including the development of the Devonport South Yard site in Plymouth and Hayle Marine Energy Business Park, and further portside developments in Bristol, Portland and North Devon.

Major South West Marine Investment Opportunities

- Plymouth South Yard – Marine Industries Production Campus
- Hayle Marine Renewables Business Park
- Falmouth Quayside and Engineering
- Avonmouth Severnside
- Appledore Engineering
- Yelland Marine Campus
- Brixham Marine Science Labs



"Innovation and growth in the global marine industries presents a considerable market opportunity for south west businesses and our research facilities; and our growing offer for this sector is an increasingly attractive proposition for UK wide and international investors." – Chris Garcia, Chief Executive, Heart of the South West Local Enterprise Partnership

"Our ambition is to transform Plymouth South Yard which has been part of the city's naval dockyard and which has recently been designated as an Enterprise Zone into a marine industries campus enabling companies to develop new technology and new services for the marine sector." – Anthony Payne, Strategic Director for Place, Plymouth City Council

3 South West Marine Energy – statement of ambition to 2030

The primary objective of the SW MEP is to accelerate the commercial development of marine energy in the South West of the UK and to enable the UK to grow and export technology and capabilities to the global industry.

Marine Energy Projects and Deployment

- Successful deployment of demonstration arrays at Wave Hub will lead to the first commercial wave farms by 2025, and 300-500 MW by 2030 leading to 1–2GW in the following decade
- Smaller tidal stream arrays and demonstration projects at the North Devon Demonstration Zone and sites in the Bristol Channel and off Portland leading to 100-200 MW by 2030
- One or potentially two tidal range lagoons off Somerset by 2030 with a capacity of up to 4 GW
- Construction of the Navitus Bay wind farm demonstration of floating wind and new foundation technology and installation for deeper water wind farms leading to commercial projects in the outer Bristol Channel and off the south coast by 2030

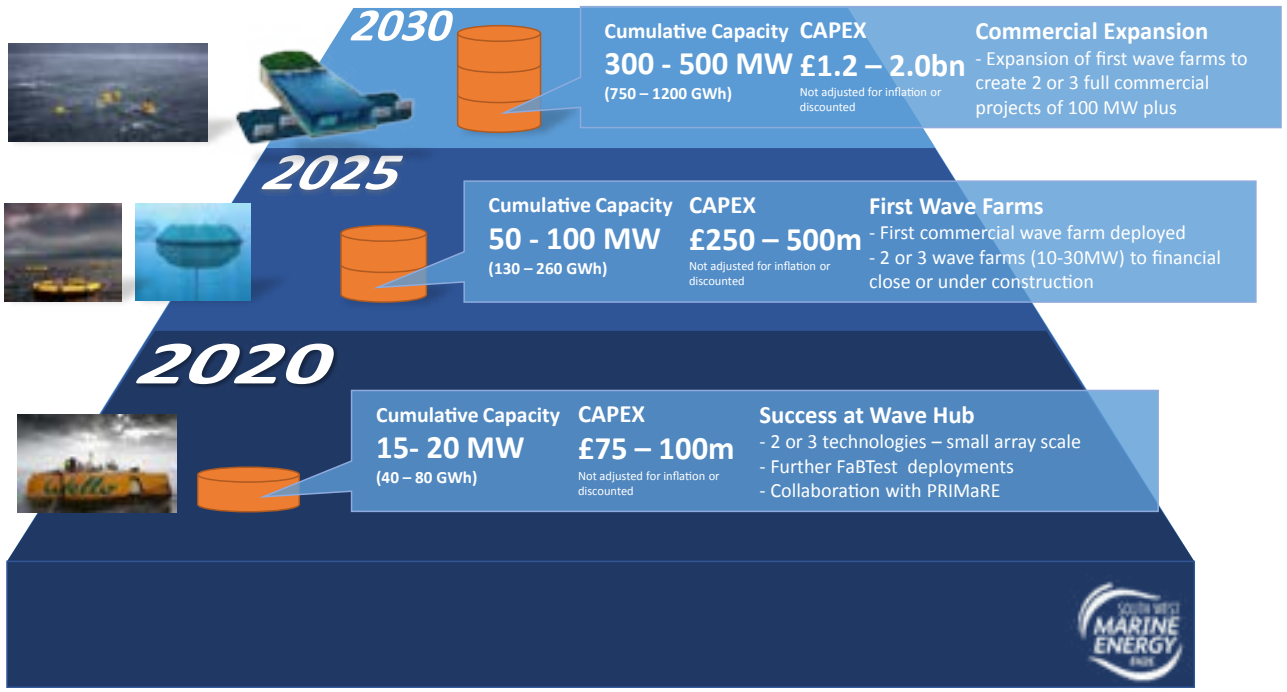
Innovation and Economic Growth

- Delivering a clean indigenous supply of low carbon energy for the UK
- A vibrant research and R&D sector, attracting technology developers from around the world, backed by investment in research facilities, and innovation clusters
- A world class cluster of marine energy companies – increasing export and inward investment opportunities led by supply chain innovation and growth
- A growing market for South West companies in Europe, Asia and North America
- The expansion of our core marine capability into new markets and the application of "BlueTech" technologies and the marine sciences
- High value job and career growth in marine energy from circa 450 today to 3000 by 2030 plus significant additional jobs in construction and the wider marine industries

Community and Sustainability

- Strong community support for marine renewable energy – a track record of stakeholder engagement, community based projects, shared ownership and benefit schemes
- Exemplary environmental and health & safety record backed by best practices and collaboration with environmental stakeholders
- Strong collaborative partnership with other UK and EU regions including Wales, North West France, Channel Islands, Scotland and Northern Ireland.
- South West recognised globally as a centre for the environmentally and economically sustainable deployment for marine technology and marine science

3.1 Wave Energy Outlook and Ambition



Cornwall and the peninsula will continue to grow as a centre for wave energy technology development attracting companies from around the world and exporting its capability to the growing wave energy sector.

Continued technology development utilising the Hydrodynamic test tanks at the COAST Laboratory, prototype testing at FaBTest and component testing at DMAC leading to the successful deployment of full scale devices and demonstration arrays at Wave Hub which will pave the way for a pipeline of projects and the first commercial scale wave farms.

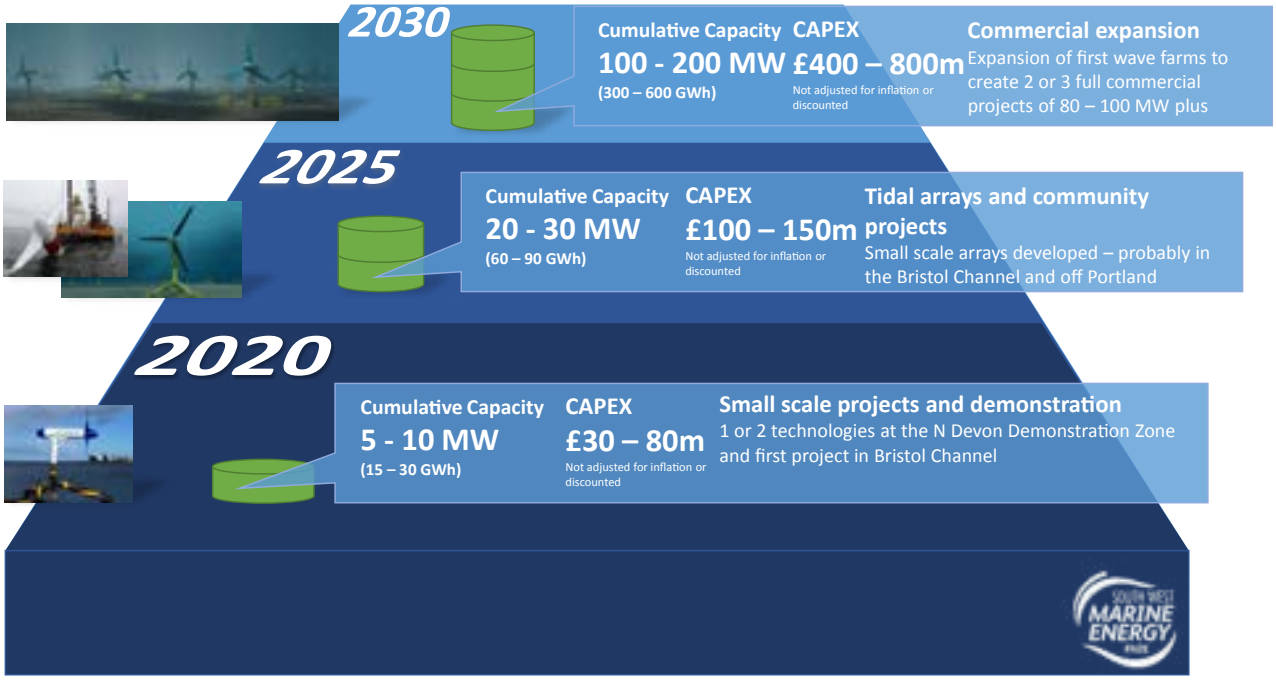
"The South West is well supplied with ports offering a wide range of facilities and services to meet the needs of the MRE industry. Falmouth is a case in point with proven capability for device construction, deployment and performance monitoring."
– Captain Mark Sansom, Chief Executive, Falmouth Harbour Commissioners

First array or pilot wave farms are likely to come as a build-out from Wave Hub and/or projects developed at sites off North Cornwall, Isles of Scilly or to the west of the Lizard.

By 2025 we expect to see the first full commercial scale wave farms, which will form the basis for further larger commercial projects out to 2030 and beyond.

Beyond 2030, there is potential to develop 1.2 GW[1] of wave energy off Cornwall, and more if this is linked to larger projects in the Celtic Sea and across to south Wales.

3.2 Tidal Stream Energy Outlook an Ambition



Industry Cluster

First projects and manufacturing

Larger projects and export capability

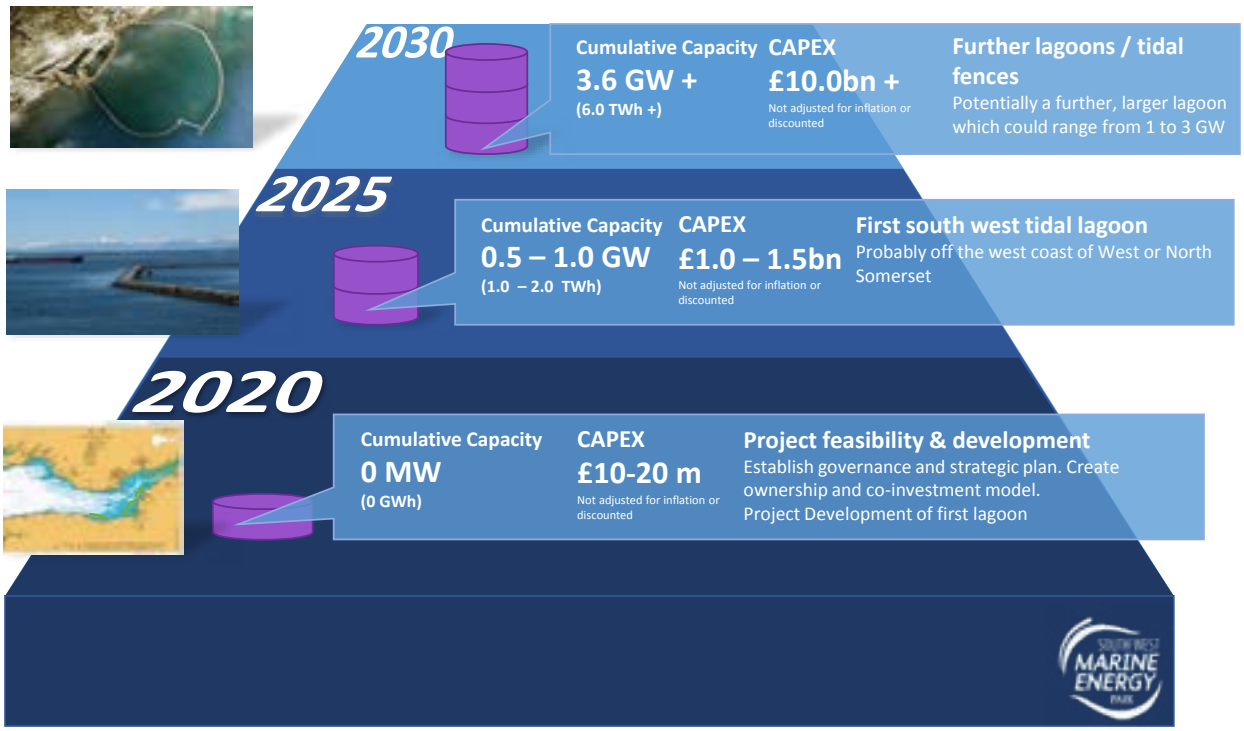
The South West will continue to grow as a centre for tidal stream technology development and a major export centre for tidal energy capability and expertise. The cluster of tidal developers based around Bristol and Plymouth will expand to create a growing supply chain and manufacturing hub.

Small scale tidal stream projects will be developed utilising the North Devon Tidal Demonstration Zone and leading to further projects in the Bristol Channel and off Portland. Beyond 2030 there is potential to develop approximately 600-800 MW of tidal energy in the Bristol Channel and off Dorset.

While project deployment in the South West may remain relatively small, the SWMEP will develop strong relationships with other centres of tidal energy including Wales, Isle of Wight, Channel Islands and North West France creating project development, export and collaborative opportunities for South West companies and research organisations.

"The Bristol city region is home to a world-leading cluster of tidal energy developers, engineering and research expertise. It offers the ideal gateway and springboard for exploiting the huge potential marine energy resources of the Severn Estuary and Bristol Channel." – Bill Edrich, Director of Energy, Bristol City Council

3.3 Tidal Range Outlook and Ambition



Feasibility, ownership and governance

First SW Lagoon by 2025

Expansion 2 or 3 lagoons

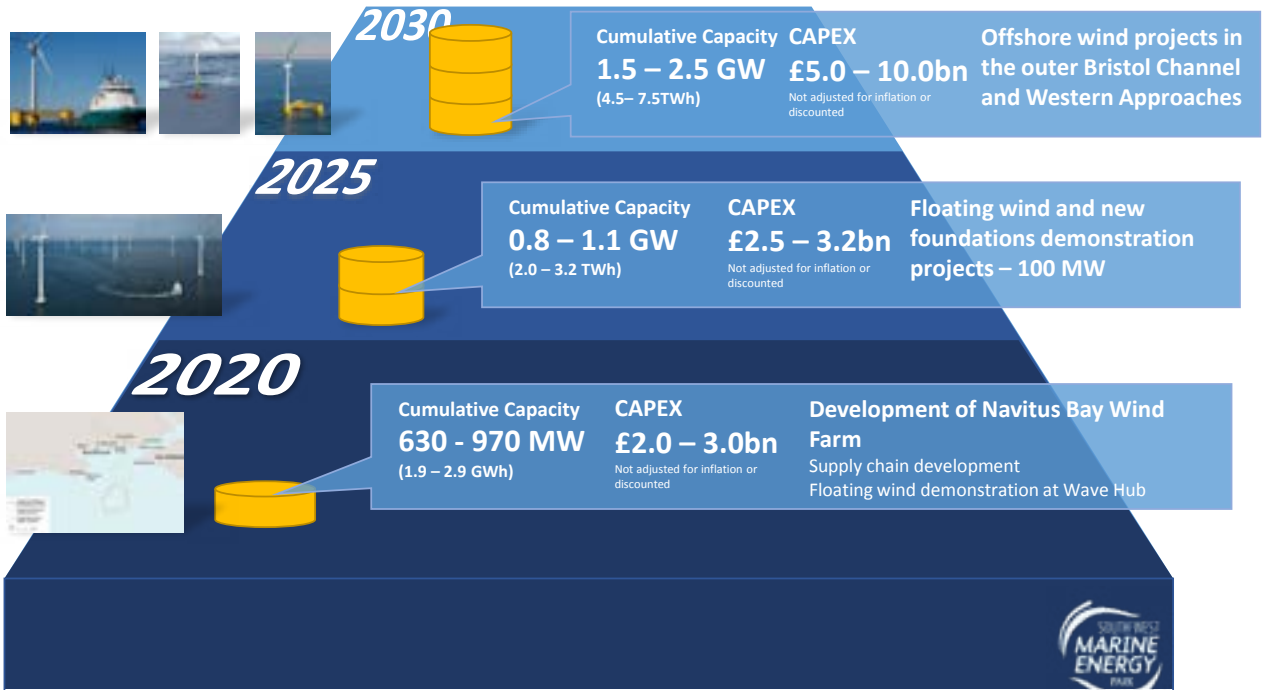
Alongside wave and tidal stream, the South West has the opportunity to develop very large projects utilising tidal range and tidal fence technology. Provided these are constructed in balance with the environmental and socio-economic interests of the region, tidal lagoons have the potential to generate significant energy while also providing jobs and civil amenities.

See Regen SW & MEM - Bristol Channel Energy: Balanced Technology Approach.

The successful construction of the Swansea Bay Tidal Lagoon, will open up opportunities for a number of tidal range lagoons in Bristol Channel, including potential lagoons off west Somerset, Bridgewater Bay and north Somerset. Lagoon sizes could range from 500 MW up to 3.4 GW if the full scale Bridgewater Bay lagoon is built.

Tidal lagoons have the potential to generate energy for over one hundred years and as well as providing civil amenities they will also have a significant impact both on the environment and on other marine users. The SWMEP vision therefore is that lagoons must have a strong element of public ownership and governance.

3.4 Offshore Wind Outlook and Ambition



Supply Chain & First Wind Farm

Floating and new foundation Technology development

SW offshore wind farm expansion

The longer term opportunity for the South West will be through the development of new foundation and installation technologies – including floating wind – which will open up the opportunity for the next generation of wind farms in deeper water in the outer Bristol Channel, Celtic Sea and off the south coast.

Although there are no plans at present for an expansion of offshore wind on the western seaboard of the UK there are strong arguments that this should happen in the next decade if new technology and installation techniques are developed for deeper water:

- To exploit new resource areas and "balance" the energy generation across the UK
- To spread economic benefits and jobs
- To exploit interconnection to Ireland and France

As well as exploiting existing opportunities in the offshore wind supply chain - the South West's ambition is to be at the forefront of offshore wind technology development especially in the area of floating wind and to utilise the FaBTest and Wave Hub sites to demonstrate this new technology.

3.5 To be a global centre for marine industries innovation and technology development

The south west is already a centre for marine energy technology development and innovation. This is supported by the cluster of technology developers in the region, consultancy firms and innovative supply chain companies.

Exploit current assets and capability	Expand marine 'blue tech' innovation clusters	Export capability to global markets
		

The tidal cluster based in and around Bristol, hosts world leading technology developers backed by a cluster of over 80 companies which provide specialist services and products for the industry.

The test and demonstration facilities at Plymouth and Exeter University; FabTEst and Wave Hub, has attracted wave energy developers from around the world.

Building on this strong foundation, the ambition of the South West is to be create a global centre for innovation and technology development in the marine industries.

To achieve this, the South West intends to:

- Fully exploit and utilise the test and demonstration facilities at Wave Hub, Fab Test and the new Demonstration Zones
- Expand and increase the funding and business support for supply chain companies developing new and innovative technology solutions for the industry
- Create new marine innovation clusters (Marine Industries Production Campus) at Plymouth South Yard, Hayle, Falmouth, and other key port locations around the region
- Diversify existing capability into new areas of "Blue tech" innovation and technology such as robotics, autonomous vehicles, green vessels and efficiency, remote monitoring, electronics, communication, marine ICT, composites and advanced manufacturing

As an example, the Plymouth and Peninsula City Deal has plans in place to establish a Marine Industries Production Campus at Plymouth South Yard which has the potential to create over 1800 new jobs focused on the marine industries.

The MIPC at South Yard will be linked to other MIPC sites in the South West including Falmouth, Hayle, Yelland, Appledore and Brixham

3.6 Supply chain and jobs – An ambition to grow the industry to employ over 3000 high skilled people by 2030

It is estimated that the marine energy sector in the South West currently employs over 450 people in high skilled jobs ranging from research and technology development, design engineering, consultancy, offshore operations, component supply and fabrication to training and business support.

As the sector expands as described above it is expects that the number of long term jobs directly associated with the industry will increase, with an ambition to reach over 3000 permanent and long term jobs in the sector by 2030, plus a potential average of 1900 jobs (2018-2030) involved in the construction of major tidal lagoons and offshore wind projects.

Permanent and long term jobs

South West Marine Energy Job Growth Ambition 2015 - 2030				
Job Growth Area	**Technology Development 2015**	**Early Commercial 2020**	**Commercial 2025**	**Full Commercial 2030**
Applied Research and Innovation	**90**	120	150	200
Marine Energy technology Developers	**90**	140	160	200
Consultancy Services	**50**	70	120	150
Manufacturing and Components	**40**	**150**	**400**	**1000**
Marine Operations and Seabased Support	**40**	**150**	**200**	**350**
Support Services inc legal, accountacy	**40**	**70**	**100**	150
Engineering/Engineering design	30	**70**	**100**	200
Training and Skills providers	30	70	150	**200**
Surveys - Environmental and technical	20	50	120	200
Ports, Ports operations and land based support	15	**70**	**150**	**400**
Utilities and Project developers	5	40	50	200
	450	**1000**	**1700**	**3250**

Major project construction and installation Jobs

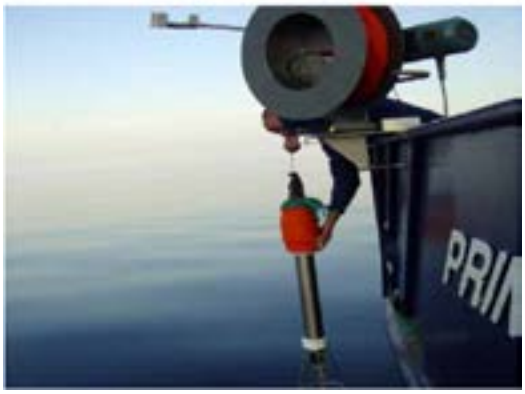
Major Project	Scale	Timeframe	Jobs	Job Years
Navitus Bay Wind	0.63-0.97 MW	4 Years 2018-21	1700	6800
Tidal Lagoon Somerset	0.5-1 GW	3 Years 2020-23	1000	3000
Tidal Lagoon Bridgewater	3.5 GW	4 Years 2024-28	2500	10000
Floating & next generation wind	1 GW	2025-30	600-1000	3000
Average Jobs and Total	**5 - 6.5 GW**	**12 years**	**Avg 1900**	**22,800**

In addition to these permanent jobs it is expected that the marine energy sector will also contribute to jobs in the UK and South West economy by:

- Providing an innovation and technology springboard to enable companies in the South West to expand into other areas of marine technology development and innovation and to become established in the growing "Blue Tech" sector
- Through a high value job multiplier effect across the south west economy.

3.7 Marine sciences and environment - to be recognised as a global centre for marine and climate sciences and an exemplar in sustainable development

Marine energy seeks to harness the natural energy resource of the ocean to generate energy. In the South West the marine environment is regarded as our most precious and important resource supporting a rich marine ecology as well as other marine users from fishing and surfing to tourism. It is essential therefore that the Marine Energy industry must uphold and maintain the highest standards to conserve and protect the marine environment.



Already the South West has established itself as a leading centre for study and research in the marine environment with organisations like Plymouth and Exeter University, Plymouth Marine Laboratories, Marine Biological Association, the MET office and Sir Alister Hardy Foundation.

This capability has been supported by the programme of research environmental associated with Wave Hub and investment in PRIMaRE, the collaborative partnership between Exeter and Plymouth University, which has now been expanded to include the universities Southampton, Bath and Bristol and PML.

The ambition of the South West is to recognised as a leading centre for the marine and climate sciences, and an exemplar in sustainable project development.

To achieve this the South West will:

- Continue to invest in marine and environmental science research
- Promote co-location and balance between energy projects and areas of marine conservation.
- Work with environmental stakeholders and other marine users to minimise the environmental impacts of marine energy deployments
- Become a centre for knowledge, understanding and best practice

3.8 Community and Stakeholder – to garner and maintain support for marine energy and promote a shared benefit and co-investment models for the industry

The deployment of significant marine energy projects in the South West must be accompanied by a strategy to secure and maintain public and stakeholder support for the industry. It will do this by:

- Ensuring early, open and transparent engagement
- Recognising and fairly addressing stakeholder issues
- Engaging with local communities and interest groups
- Adopting and sharing best practice in terms of engagement and community benefits

Moreover, since the industry will be exploiting a common, natural resource, there is a strong ethical argument that the benefits from marine energy projects should also contribute to the public good and be shared with local communities. It is therefore a core ambition for the South West to promote shared benefit and co-investment models both as a means of channelling funding into marine energy projects and to ensure that the benefits of energy generation delivers value to local communities. Shared ownership models could take the form of municipal investment or more local community ownership schemes.

Both Bristol City Council and Cornwall Council, for example, have established Energy Supply Companies (ESCO's) co-invest in energy schemes which could include marine energy. The Isles of Scilly would be a prime contender for a community based project and would potentially tie-in with a European funded programme to support employment, energy, transport, grid and communication infrastructure for island communities.

3.9 Exploiting global markets and exports

The opportunity for the South West extends beyond projects and developments within the region. Having built up a strong capability in areas of innovation, technology, supply chain and marine sciences the ambition is to create strong partnership and export opportunities with other region's with marine energy resource potential around the world.

Already South West based companies and research organisations are working with partners across the UK, in Scotland, France, Spain and Portugal and increasingly in Asia (Japan, Korea and China) and the Americas.

Other countries are rapidly catching up with the UK in terms of project deployment – for example Carnegie's first wave array has been deployed this month in Australia.

3.10 South West Marine Energy Park partnership

South West England was designated as the UK's first marine energy park in 2012, giving it priority focus for the development and deployment of marine energy technologies. Alongside the designation the South West Marine Energy Park partnership and steering board has been established to bring together industry, public sector, Local Enterprise Partnerships and academic organisations to work across the region and with national and international partners to help promote and accelerate the commercial development of the marine energy sector.

The South West Marine Energy Park Steering Board is made up of industry representatives plus regional and academic partners

Current Industry Representatives

Peter Kydd	SWMEP Chair
Claire Gibson	Wave Hub Ltd
Mike Reynolds	M7M
Ross Fairley	Burges Salmon
Michael Huntingford	Zero Carbon Marine
Rob Rawlinson Smith	DNV-GL
Colin Cornish	Marine Energy Matters
Matt Hodson	Mojo Maritime
Diccon Rogers	KML
Tim Sawyer	Carnegie Wave Energy
Caroline Price	Royal Haskoning
Paul Morris	Tocardo
Nikki Meek	GoBe Consultants
Richard Guyatt	Bond Dickinson
Nick Ames	Supacat
Martin Murphy	Tidal Energy Limited
Tim Fileman	Plymouth Marine Laboratory

Regional and academic partners

- West of England LEP
- Heart of the South West LEP
- Cornwall and IoS LEP
- Bristol City Council
- Plymouth City Council
- Cornwall Council
- Plymouth University
- Bristol University
- Exeter University
- Regen SW

The South West MEP also works closely with partner organisations and programmes in the south west including:

- Cornwall and IoS - Offshore Renewables Development Programme (ORDP)
- Bristol and the West of England - Marine Energy Accelerator Programme
- Plymouth and Peninsula City Deal
- The MOR Group
- ORE Catapult
- Regen SW
- Cornwall Marine Network

The South West Marine Energy Park has MOU's in place to collaborate with other UK regions, including the Pentland Firth and Orkney Waters Marine Energy Park, Marine Energy Pembrookshire and the Channel Islands Marine Energy Group.

For more information about the South West Marine Energy Park and marine energy in the region please contact Johnny Gowdy **jgowdy@regensw.co.uk** or **download the prospectus**.