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C6534: SUPPORTING SERVICES TO

THE OCEAN ENERGY FORUM

CONFERENCE REPORT

BILBAO, JULY 1 2015

Prepared by: Cefas

Produced for: The European Commission - DG MARE and EASME

1.   Event Overview and Context

The fourth Open Session of the Ocean Energy Forum was held at Bilbao Exhibition Centre on 1 July 2015. 56 people participated in the Open Session. A list of delegates is included at Appendix 2. The main purpose of the event was;

- to report on progress made in drafting the Roadmap, and to elicit input from the Forum and wider stakeholder interests in how the drafts produced by the Working Groups might be improved: in particular, the key messages (are they correct?), the evidence (is there enough?),and the gaps (do they exist and how will they be filled?);
- to ensure that stakeholder input is captured and collated so that it can inform the next draft of the Roadmap;
- to agree and communicate next steps.

Please note that this report is intended to give a summary overview of the Bilbao event, including headline outputs and next steps. Detailed conference outputs are being produced and will be made available on the Forum website – please see Section 5.

2.   Event Structure

The Programme (see Appendix 1) was developed and agreed with the Chairs of the Working Groups, and was designed to make the best use of the time available, with a mix of both plenary and group discussions.

The Open Session commenced with brief introductory presentations from DG MARE, and each of the three Chairs (in total 40 minutes); the majority of the day was then devoted to individual break-out discussions across the three Working Groups. These discussions focussed on the content of the documents produced prior to the event by the Chairs of the Working Groups (see Section 4, "Session Information" below).

Each group session had a facilitator to help generate and capture discussion. The discussion was recorded on flip-chart paper and was visible to group session participants to ensure accuracy of recording.

The format of the afternoon break-out sessions was altered slightly to allow for further more targeted discussion, and continuation and conclusion of the morning session work. The Environment and Consenting Group explored the challenges in delivering the Roadmap within the defined timeline.

There was a final plenary session which drew together the key emerging themes and issues from the break-out groups, which will feed into the next iteration of the Roadmap, together with all outputs from the discussion groups.

3. Session Information

Welcome

The Session was opened by Stijn Billiet of DG MARE. Stijn welcomed attendees, advising that the aim of the meeting was to make substantial progress towards completing the Strategic Roadmap. He said that the Roadmap needed to be a "stand-out-from-before" document that identifies specifically what type of actions will be needed to further the Ocean Energy sector - a document that is **actionable and sets priorities; that identifies how to overcome current barriers and issues and who will be the main actors for this**. Stijn stressed that the work should be more than a than a list of projects; it was also important to hear from the industry on what they can do in terms of creating data sharing and transparency, and what is needed / can be done at a regional level. The introduction was concluded with thanks to Chairs and the Steering Committees for providing the three-pager documents.

Work Stream Updates – Steering Committee Chairs

Fiona Buckley, GDF Suez – Chair of the **Technology** Steering Committee; Fiona reinforced the message that there is a lot to do to achieve production of the Roadmap document to DG MARE in Autumn this year. From a Technology perspective, the overall objective is to reduce the Levelised Cost of Energy per kWh produced and be competitive in the renewables sector. Fiona urged Conference to look at the Technology document in detail to understand what are the common challenges, how we tackle them and set priorities (who, what and when) to drive the sector forwards.

Rémi Gruet, Ocean Energy Europe – Co-Chair of the **Finance** Steering Committee (Chair - Ronnie Quinn, the Crown Estate); Rémi asked the Conference to consider the theme of what to finance and how to finance it, and the issues involved with public versus private sector funding of technologies to go beyond their current development stage and reach commercialisation, by producing enough electricity and knowledge to improve them, make them mainstream and bankable.

Phil Gilmour, Marine Scotland - Chair of the **Environment & Consenting** Steering Committee; Phil outlined that the main aim was to promote and facilitate planning and regulatory processes across Member States that are fair, appropriate to the sector and with established commonality, to enhance an attractive EU market for ocean energy. Key themes to address are:

- Planning (e.g. realising benefits of marine spatial planning to the sector)
- Consenting / Licensing (e.g. promoting best practice and reducing uncertainties in national licensing processes)
- Strategic Research & Monitoring (e.g. to cost-effectively reduce risk and uncertainty regarding social and environmental effects).

The Break-out Discussion Sessions

The first objective of the group sessions was to set out the current state of progress to date ("where we are now"). "Where we are now" was encapsulated in three x three-page documents ("the three-pagers"), produced by each of the three Working Groups and disseminated to all attendees shortly before the Conference. These documents were the key papers for the event. Taken together they represent a prototype Strategic Roadmap; the purpose of the Conference was to begin to gather comment and input on the three-pagers, and on the process itself, from the widest possible range of stakeholders, so that the final Roadmap, when it is produced, will have the cohesion, credibility and "buy-in" that result from an inclusive process.

The groups then set about assessing the three-pagers, with particular regard to confirming that the inherent messages were correct, identifying any gaps and problem areas, and considering the degree of existing available evidence.

The key themes emerging from the three break-out groups are summarised below (a more comprehensive account of all discussions will be posted separately on the Ocean Energy Forum website).

Environment and Consenting

Synthesis:

1) Establish open and common European 'database/portal' to capture ongoing existing and emerging issues, licence conditions, real impacts, mitigation solutions and outcomes. This inclusive and flexible approach would ensure that individual MS specificities were included (multi –lingual portal).
2) Develop procedures to ensure feedback of outcomes from (1) at national and international levels thus allowing continuous improvement.
3) Establish Risk management methodology to ensure proportionate licence conditions i.e. moving beyond "deploy and monitor"
4) Establish a manual of Regulatory best practices in order to reduce industry's burden (cost and time) and to expedite regulatory approval (based on (1) and (3)).

Technology

Synthesis:

1) Establish a clear vision on a "macro level" what the installed MRE capacity requirement will be within the EU energy generation profile.
2) Establish common infrastructure and test procedures for the development of MRE devices and associated sub-systems/components.
3) Establish a network of European centres allowing the exchange of knowledge and acceleration of required technologies for establishment of MRE industry. This should include the establishment of a centralised data system and leverage what has already been achieved in Europe.

4) Establish R&D priorities for individual MRE technologies as well as common technology needs, and provide a long term funding mechanism that will allow these priorities to be addressed.

5) Establish a realistic development plan with ambitious targets to realise industrial breakthrough of technologies

Finance

Synthesis:

1) Establish the level of investment required to attain a 1GW of installed capacity in the different ocean technologies related to public and private investment requirements.

2) Establish financing mechanism that allows strategic investment to develop technology on sub-system and component level, whilst in parallel providing up-front grant support for demonstration and first array establishments. This financial support should be consistently focused on technology and not specific towards device development.

3) Establish a coherent funding structure that enables industry and academia to develop the industry through the establishment of strong R,D&I and demonstration establishments. Financing is different for research and business, and requires better knowledge of some issues in the future.

4) Establish clear EU and national funding structures, with minimal barriers, that are aligned with a clear technology development plan over a period of 10 years. There is a requirement for simplified, non-contradicting aid / grant programs through a dedicated fund for marine renewable investment financing for R+D and demonstration.

4.   Conclusions, Outputs, Next Steps

Conclusions

Stijn Billiet (DG MARE) gave a closing address, thanking all attendees for their inputs. He said that the discussions raised a lot of good points and were delivered with both enthusiasm and energy, and he underlined the importance of ensuring that comments made on the day would be taken into account and that everyone has the opportunity to be involved. It was clear from the discussions that each Working Group had its own approach, so the Secretariat's role in producing a cohesive Roadmap was important. Stijn confirmed that the outputs from the Conference would be made available to all stakeholders (including those unable to attend in Bilbao). He reiterated DG MARE's confidence that the Strategic Roadmap will be produced and delivered to meet the various key deadlines.

Outputs

The following outputs are being generated from the event:

- This **conference report**

- The three "**three-pagers**" which were provided by the three Steering Committees prior to the Conference. These are version-controlled as *"Draft for Discussion V1.0 – Ocean Energy Forum Open Session Conference, Bilbao 01st July 2015".*

- **Word for Word** (what was said at the Conference during group sessions, unaltered)

- **Emerging Process document (**putting what was said into clusters / meaningful structures)

All outputs will be available on the Forum website by the end of July 2015;
https://webgate.ec.europa.eu/maritimeforum/en/frontpage/1036

Next Steps

Following post-conference discussions with DG MARE and Chairs, a process has been formulated outlining the next steps in the Roadmap production for submission to DG MARE October 2015. **Please see Process Map at Appendix 3.**

In summary and to take account of the timeline and summer holiday period, and to accommodate wider stakeholders who were unable to attend Bilbao;

- An updated version of the 3-page summaries prepared for the Bilbao Conference will be updated by SC Chairs and available on the Forum website w/c 20th July 2015.
- There will then be a period for further comment on Version 1 during 20 July – 20 August.
- Following this, the Secretariat will produce a draft **Roadmap**, taking into account comments received through the website **and the outputs from the Bilbao conference**.
- This draft Roadmap will then be ratified by the Chairs for final discussion with Steering Committees on 18th September 2015.
- This version will then be submitted to DG MARE 02 October 2015 for Ministerial discussion in due course.
- From October 2015 to 2016, the Secretariat of the Ocean Energy Forum will work to consolidate the **evidence** behind the Roadmap.

Appendix 1; Conference Programme

Ocean Energy Forum Conference
1 July 2015, Bilbao Exhibition Centre, Bilbao
Agenda

During the day, people will alternate between working in breakout groups (**G**) so everyone has the chance to contribute, and working in plenary (**P**) for briefing or to reconnect and hear progress

8:30	Registration		
9:00	**Welcome**		
	Welcome	Stijn Billiet, DG Mare	**P**
	Facilitator's introduction	Diana Pound, Director, Dialogue Matters	**P**
	Review of the Draft Sections of the Strategic Roadmap		
9:20	**Work Stream updates**	Work Stream Chairs	**P**
9:40	**Breakout discussions** (Environment & Consenting, Technology, Financing)		**G**

The messaging (3 page document)

What do you like about the messaging overall?
Is anything substantive missing? If so, what, and why is it important?
What suggestions do you have for improving the messaging overall?
What suggestions do you have for improving the detail?

10:45	Short comfort break (groups stay in rooms, coffee served in rooms)

10:55   **Ensuring the messaging is backed by sound evidence**

What comments do you have on the evidence?
What are the remaining gaps in evidence?
How can they be filled (eg, more examples, more literature)?
What can you do to help fill them?
From your Work Stream discussion, what specific point do you most want to feed back to the wider group?
If the improvements discussed this morning were made, to what extent would you support this document?
What would need to happen for you to increase your support?

11:50	**Feedback from Work Streams**	**P**
12:30	**Lunch**	
13:30	**Cross-cutting Issues**	**G**

Why is this important?
What is already happening to address this cross-cutting issue?
What more needs to happen?
What evidence will back this up?

What are the headlines from this discussion you want to feedback to the wider group?

14:40	Break		
15:00	**Feedback session on cross-cutting issues**		**P**
15:35	**Wrap up, thanks and next steps**	Stijn Billiet, DG MARE	**P**
16:00	FINISH		

Appendix 2; list of delegates registered to attend

Name	Organisation
Jose Luis Aguiriano	*Oceantec*
Olate Ajuria	EVE Basque Energy Agency
Alex Alliston	Alstom Ocean Energy
Julio César Álvarez	Bosch Rexroth
Alvaro Amezaga	SENER
Guillermo Barredo	Degima
Stijn Billiet	DG MARE
Charles Bodel	EDF R&D
Fiona Buckley	ENGIE
Michael Bullock	Renewable Risk Advisers
Zoe Buyle-Bodin	Region Basse-Normandie
Brendan Cahill	Sustainable Energy Authority of Ireland
Christian Carestia	Mathfem
Barry Carruthers	*Scottish Power Renewables*
Garrett Connell	OpenHydro Group
Emilio De la Rua	Foro Marítimo Vasco
Ferdinand Dees	DNAC/BT-Projects
Natalia Díaz de Arcaya	EVE Basque Energy Agency
Pedro Diaz Simal	University of Cantabria
Per Ebert	Wavestar
Pedro Fernández Oyón	*Idom*
Karen Fraser	*Scottish Enterprise*
Julian Gallardo	Mondragon Eko
Aitor Garrido	EVE Basque Energy Agency
Izaskun Garrido	University of the Basque Country
Phil Gilmour	Marine Scotland (The Scottish Government)
Rémi Gruet	Ocean Energy Europe
Raul Guanche	IH Cantabria - University of Cantabria
Jose Joaquin Hernandez-Brito	Oceanic Platform of the Canary Islands (PLOCAN)
Joe Hulm	Ocean Energy Advisors Ltd.
Ian Hutchison	Aquatera Ltd
Henry Jeffrey	The University of Edinburgh
Lars Johanning	University of Exeter
Janine Kellett	Scottish Government
Eva Larrea	*Mondragon Eko*
Tony Lewis	MaREI/ERI, University College Cork
Dorleta Marina	bimep - Biscay Marine Energy Platform
Javier Marqués	*EVE Basque Energy Agency*
Catherine McDonald	Department of Energy
Jacopo Moccia	Ocean Energy Europe
Eugene Nixon	*Marine Institute*
Ana Novak Zdravkovic	Laborelec
Kieran O'Brien	CWE

Anne Marie O'Hagan	University College Cork
Patrick O'Kane	Aquamarine Power
David Pratt	Marine Scotland (The Scottish Government)
Jon Rees	Cefas
Alvaro Rodriguez	*CTC*
Raul Rodriguez	CTC
Francisco Royano	IH Cantabria - University of Cantabria
Pablo Ruiz-Minguela	Tecnalia Research and Innovation
Antonio Ruiz Montero	Abengoa Seapower
Luis San Segundo Gonzalez	Degima
Esti Sanvicente	Basque Energy Cluster
Beñat Sanz	Spanish Renewable Energy Association- APPA
Antonio Sarmento	WavEC
Mikael Sidenmark	Ocean Harvesting Technologies AB
Andrew Smith	Scottish Investment Bank
Matthijs Soede	DG Research & Innovation
Robert Stevenson	Alstom
Yago Torre-Enciso	bimep - Biscay Marine Energy Platform
Saúl Torres-Ortega	*University of Cantabria*
Jose Luis Villate	Tecnalia
Nicolas Wallet	Ocean Energy Europe
Mark Wemyss	*SmartBay Ireland*
Oliver Wragg	The European Marine Energy Centre (EMEC)

.NB: Details *in italics* indicates that the delegate did not formally register attendance on the day.

Appendix 3; Process Map setting out next steps
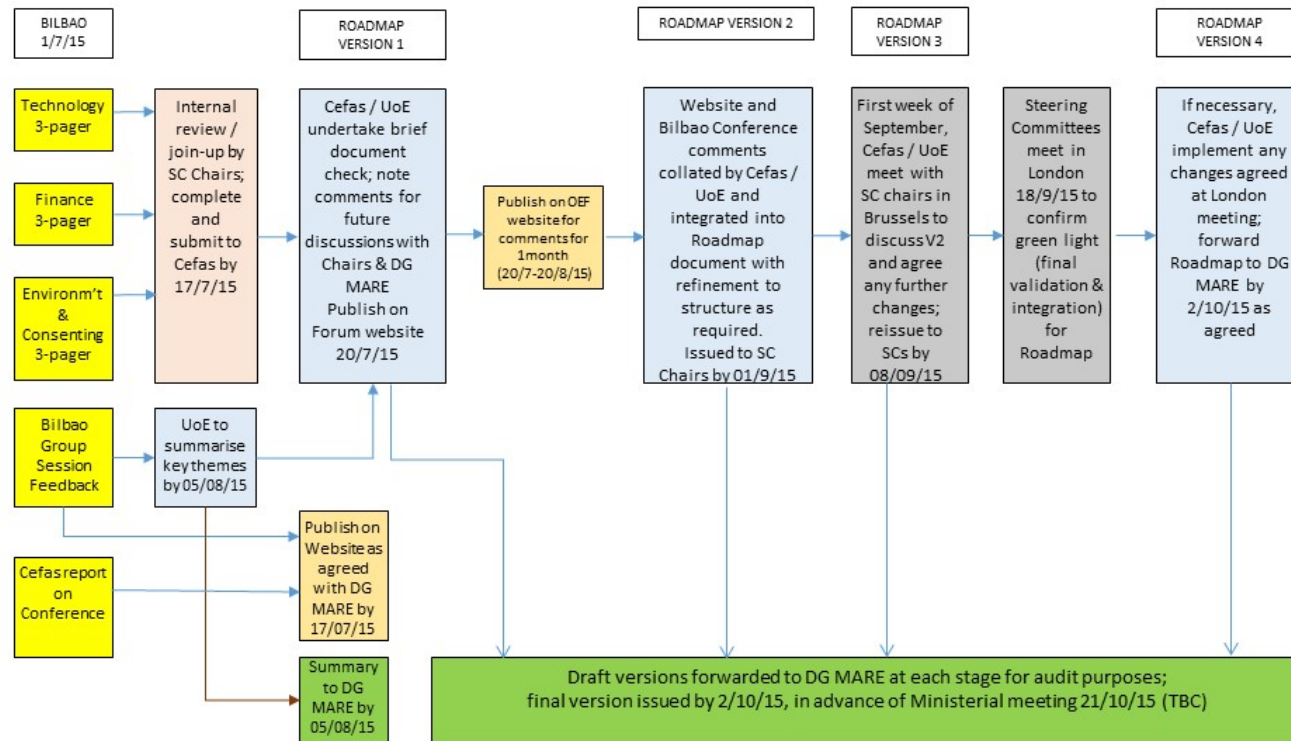
Process map for production and submission of OEF Strategic Roadmap to DG MARE by October 2 2015

V2. Produced by Cefas 14/7/15

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