

Studiensteckbrief

Dr. Alexander Brem, Frank Mühlmann, Ted Sarmiento

Renewable Energies in the United Kingdom (UK)

Facts, Figures, Trends and Outlook

Typ der Studie	Marktstudie
Jahrgang	01/2009, 1. Auflage
Verfasser	Dr. Alexander Brem, Frank Mühlmann, Ted Sarmiento
Sprachversion	Englisch
Verfügbarkeit	Lieferbar
Seiten	37
Abbildungen	30

Kontakt:

VEND consulting GmbH
Burgschmietstraße 2-4
90419 Nürnberg

Tel. +49 (0) 911 373 000 10
Fax +49 (0) 911 373 000 29

brem@vend-consulting.com
www.vend-consulting.com

Abstract:

The market in the UK for renewable energy is arguably at a very critical phase in its development. Key drivers for current policy include energy security, climate change and energy prices added to which the UK has agreed specific targets with other EU countries to help meet these challenges. The UK is currently very poorly placed in the league table of EU nations in response to meeting these targets, with only Malta and Luxemburg currently performing less well according to Philip Wolfe of the Renewable Energy Association. However the UK government does expect to bridge this gap:

“The 20% renewables target is an ambitious goal ...
by 2020, on the basis of existing policies, renewables would contribute around 5% of the UK’s consumption ...
we will bring forward the appropriate measures, beyond those set out in this White Paper, to make our contribution to meeting these targets.”

DTI Meeting the Challenge A - White Paper on Energy (May 2007)

This timely report entirely researched and compiled by VEND consulting, an innovative management consultancy based in Germany, is aimed squarely at assisting companies seeking to gain an advantage in the UK market at this critical time. VEND consulting has gained experience of Renewable Energy through its pioneering work assisting German manufacturers and suppliers in the more highly developed continental market. Using this knowledge and experience VEND consulting has embarked on this substantial piece of research to help UK organisations and suppliers in this market better understand the current business environment and political climate in which to trade profitably.

The report is in 5 sections beginning with a general overview of worldwide energy demand and a description of the range of renewable energy alternatives. Section 2 describes the development of the UK renewables marketplace with section 3 providing a market overview including a summary of selected key organisations currently operating. Section 4 of this report summarises the key finding of VENDs own research, based on a survey of 65 organisations operating in the market today, into the state of the UK market including a view on the trends and outlook for the future. Finally the report offers some concluding remarks which state, among others, that the UK market is still in its early stages compared to the EU and in general the renewable energies markets are growing internationally.

VEND consulting would like to thank all the participants of this research and we hope that the invaluable contributions made by all those involved have provided an important resource on the future state of the renewables energy industry, in particular the challenges and opportunities for those participating in the potentially lucrative UK market.

Inhaltsverzeichnis:

- 1 General framework of Energy Policies
- 2 Development of the UK Renewables Market
- 3 Market Overview
- 4 Market Survey
- 5 Conclusion

Abbildungsverzeichnis:

- Illustration 1: Worldwide energy consumption in Exajoule
- Illustration 2: Renewable energy share of global final energy consumption
- Illustration 3: ROC Banding Approach
- Illustration 4: Possible share of sectors in the UK
- Illustration 5: Offshore wind farm in Horns Rev
- Illustration 6: Pelamis wave energy converter
- Illustration 7: Large-scale hydro scheme in Scotland
- Illustration 8: Solar panels on a roof
- Illustration 9: Development of UK renewable energies
- Illustration 10: Renewable energy utilisation 2007
- Illustration 11: Key Players (manufacturer) on the UK renewables market
- Illustration 12: Survey Profile
- Illustration 13: Categories of participants
- Illustration 14: Number of employees
- Illustration 15: Industry sectors
- Illustration 16: Headquarter location of the participating companies
- Illustration 17: Main sales markets
- Illustration 18: Business expansion plans
- Illustration 19: Expected market growth solar energy
- Illustration 20: Expected market growth hydro energy
- Illustration 21: Expected market growth wind energy
- Illustration 22: Expected market growth bio energy
- Illustration 23: Expected market growth geothermal energy
- Illustration 24: Stage of the UK renewables market compared to the EU
- Illustration 25: Average share of total primary energy supply
- Illustration 26: Benefits of governmental subsidies
- Illustration 27: Dependency on governmental subsidies
- Illustration 28: Diversification of the UK renewables market
- Illustration 29: Mean values of market situation evaluations
- Illustration 30: Comparison of the renewable energy sectors in Europe

Über die VEND consulting GmbH

Die VEND consulting GmbH bietet eine marktorientierte Unternehmensberatung, die aus einer prozessorientierten Perspektive Beratung nicht nur auf den Punkt bringt, sondern sie auch effizient umsetzt. Ziel der Beratung ist primär die Implementierung effektiver und zeitgleich effizienter Prozesse auf Basis derer nachhaltige Wettbewerbsvorteile generiert werden können.

Neben der Entwicklung marktgerichteter Strategien und Konzepte erfasst und restrukturiert die VEND consulting GmbH mit einem anpackenden Projektmanagement auch die dafür notwendigen innengerichteten Leistungsprozesse eines Unternehmens.

Die Marke VEND steht metaphorisch für innovative Techniken und Methoden in den Bereichen der strategischen Geschäftsfeldentwicklungen, der Kundenwirtschaft sowie des Prozess- und Projektmanagements.

Über die Autoren

Dr. Alexander Brem (Dipl.-Kfm., Dr. rer. pol) studierte und promovierte im Bereich Betriebswirtschaftslehre an der Friedrich-Alexander-Universität Erlangen-Nürnberg. Er ist Gründer und Geschäftsführer der VEND consulting GmbH.

Frank Mühlmann (Dipl.-Kfm.) studierte Betriebswirtschaftslehre an der Friedrich-Alexander-Universität Erlangen-Nürnberg und an der University of Hull (Business School) in England. Seinen Aufenthalt in UK schloß er mit dem Titel BA (Hons) in Business Studies ab. Seit 2007 ist er als Berater bei der VEND consulting GmbH tätig.

Ted Sarmiento (M Eng Mechanical Engineering) studierte Maschinenbau an der Newcastle University und arbeitete danach für Unternehmen wie Rolls Royce oder BOC Edwards. Heute ist er Senior Lecturer an der Leeds Metropolitan University (UK), Fakultät für Betriebswirtschaft und Recht (<http://leedsmet.ac.uk/>).