



ENERGY

STRATEGY AND POLICY SERVICES

Informing your decisions - market and policy insight grounded in technical understanding

Which technological innovations and supply chain developments are reshaping the renewable energy landscape? What are the direct and indirect impacts of changing energy policies? How are companies capitalising on market changes to enter new sectors and strengthen their position in others?

Making the right decisions in today's fast evolving renewable energy sector is no easy task. Continually changing market conditions, complex political dynamics and rapid technology development delivered through an increasingly global and interconnected supply chain are just some of the challenges facing industry decision makers. Properly understood, these complexities offer unique opportunities for industry players to gain competitive advantage and reduce risk. They also can deliver governments with the insight needed to regulate these industries effectively to achieve policy goals.

Developing successful strategies and effective policy tools in the renewable energy sector requires a global perspective informed by local knowledge as well as technical understanding based on genuine industry experience. As the world's leading independent renewable energy consultancy, DNV GL offers its clients the advantage of real access and insight into what shapes the renewables industries. Our Strategy & Policy Services (SPS) unit is a multi-disciplinary team of senior industry professionals tasked with interpreting the trends and drivers of change in renewable energy markets. SPS is "plugged in" to a global network of market and technology experts from across DNV GL - giving us the ability to obtain, analyse and communicate valuable market intelligence in wind, solar and marine energy markets.

Our clients can be confident that their decision making will be supported and informed by industry leading experts from around the world.

Strategy consulting

Rapidly changing market conditions and shifting competitive dynamics offer constant challenges and opportunities within the renewable energy sector. There is no substitute for deep industry knowledge based on a long history of front-line experience - we use this to help our clients build better strategies.

Our in-house team of consultants work closely with clients and our services are driven by their unique needs. Service offerings include:

- Market intelligence, market briefings, and analysis of market dynamics
- Competitive positioning and benchmarking
- Technology and supply chain strategies
- Market entry advice, risk profiling, partnering and M&A
- Economic and financial analysis
- Market trends and forecasting
- Strategic recommendations about partnerships and M&A

CASE STUDY

Role: Strategic Advice on Technical and Market Assessment of Emerging Energy Technologies

Client: Centre for Energy Advancement through Technological Innovation (CEATI)

- Technical and market assessment of 14 different emerging technologies relevant to utility-scale electric power generation globally, with special focus on North America to support long-term strategy development
 - Detailed technical review for onshore wind, solar PV, solar thermal and CSP, utility-scale storage, and biomass
 - Medium level of effort for marine gas electric generation sets, enhanced geothermal, wave and tidal stream, river hydrokinetic and small hydro
- Technical reviews: background, progress to date and foreseeable developments.
- Market reviews: current status and trends including cost estimates over the 2020 and 2035 horizons.
- Discussion on policy and environment attributes.

Policy and regulatory advice

The energy sector, and renewable energy, in particular, is strongly influenced by the prevailing political environment. With industry objectives, targets and even rates of return being determined by government policy, understanding the interplay between technology, economics and politics is vital to anyone seeking to invest in, regulate or influence the future direction of renewable energy markets.

We work together with governments, agencies, development banks and private companies to find customised solutions to a wide range of policy challenges. Our clients trust our proven track record of delivering high quality policy consultancy, grounded in the reality of industry knowledge.

This is supplemented by a wide range of analytical techniques including qualitative and quantitative research methods deployed by our team of professionals with backgrounds in engineering, business, economics and the social sciences.

We have worked with leading policy stakeholders around the world on a wide range of services, including:

- Analysis of policy and regulatory frameworks for businesses
- Tariff design
- Licensing and permitting arrangements
- Comparative studies of international policy
- Best practice and policy recommendations
- Support for developing renewable energy targets
- Industrial benefits analysis
- Design of research and development programs

CASE STUDY

Role: Renewable Energy Policy and Regulatory Review and Recommendations

Client: IFC on behalf of Thai Department of Alternative Energy and Energy Efficiency (DEDE)

- Comparative regulatory and policy review
- Industry and private sector feedback
- Stakeholder meetings with ministries, regulator, main utilities and distribution and transmission entities
- Analysis of local
 - Licensing & Approval
 - Environmental & Social
 - Legal & Regulatory Framework
 - Economics, Finance and Business
- Review of draft RE law
- Policy recommendations, focus wind and solar
- Presentation to DEDE and IFC

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