



# Delivering Projects Through Market Change – The Sequel

IWEA Conference  
March 2019

# Who are Ionic?

- 2003 - Wind Prospect Ireland setup in Dublin
- 2016 - Rebranded following MBO
- Ireland's leading technical service provider
- 1.7GW+ of wind projects completed as O/E
- Key role in 2GW+ of Renewable Energy projects
- Full suite of engineering and project skills
- Recently opened office in Edinburgh
- And in case you missed it.....



Irish Wind Industry Awards 2019  
Consultant Firm of the Year Award

Ionic Consultants

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IWEA  
Irish Wind Energy Association

IRISH WIND  
INDUSTRY AWARDS

IWEA  
Irish Wind Energy Association

...CONSULTANT OF THE YEAR!

# Why the Sequel???

- In 2015 the supply chain was challenged to deliver REFIT2
- Concerns were raised about our ability to deliver
- Now we are entering a reverse phase
- Can the supply chain survive a pause/contraction?
- Conferences often focus on the development environment
- It is important to consider the impact on the supply chain  
*(but quickly as the bar is open and calling!!)*



## *Delivering Projects Through Market Change*

IWEA Conference - 26<sup>th</sup> March 2015

working in partnership, delivering capacity

**IWEA**  
Irish Wind Energy Association





# Conclusion

- The industry is entering a critical phase
- The supply chain will be under pressure.....
- But is mature enough to deliver
- **Visibility of the post-REFIT 2 landscape is vital**
- A time for realism and pragmatism
- Important to manage the human interactions
- **We should strive to be the best in the world!!!!!!**
- It is a time for positivity and remember.....



# Final Message

*"In the field of opportunity it's ploughing time again!!!"*  
(Neil Young)



# Same Stuff.... Different Day!!

- The industry is entering a critical phase – RESS/Corp PPA
- The supply chain will be under pressure – To Sustain Itself
- But is mature enough to deliver – Need to Retain Expertise
- Visibility of the post-REFIT 2 landscape is vital – Still! ☹️
- A time for realism and pragmatism – For Different Reasons
- Important to manage the human interactions – Always
- We should strive to be the best in the world!!!!!! - Continue
- It is a time for positivity and remember.....



# New Message!!

*“There ain't no way  
of telling where  
these seeds will  
rise or when!!!”*

(Neil Young)





# Market Change...

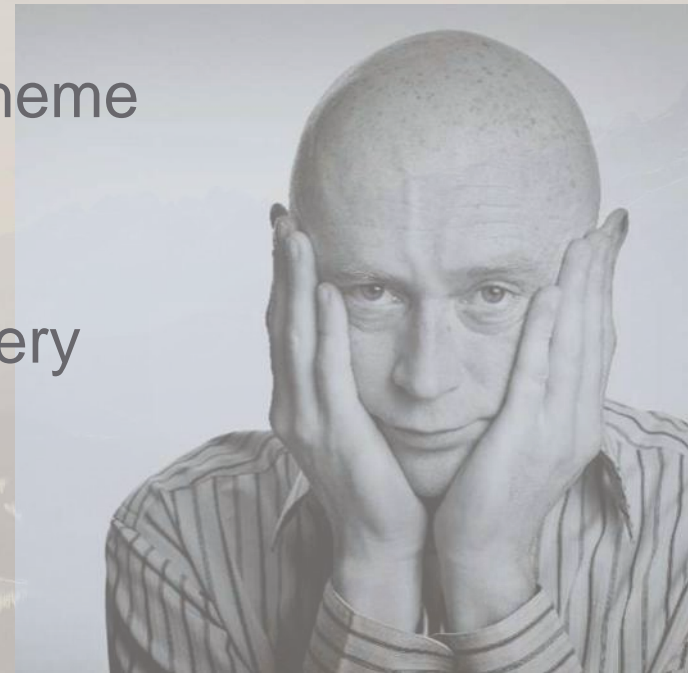
- What are the challenges?
  - The End of REFIT 2
  - Uncertainty over New Support Scheme
  - Migration to I-SEM
  - Delays to Grid Infrastructure Delivery
  - Delays to DS3 Roll-out
  - Difficult Planning Environment
  - Council Rates Issues
  - Etc etc etc!!!!



# Market Change.... 2019

## What are the challenges?

- The End of REFIT 2
- Uncertainty over New Support Scheme
- Operating under I-SEM
- Delays to Grid Infrastructure Delivery
- Delays to DS3 Roll-out
- Difficult Planning Environment
- Council Rates Issues
- Etc. etc. etc!!!!





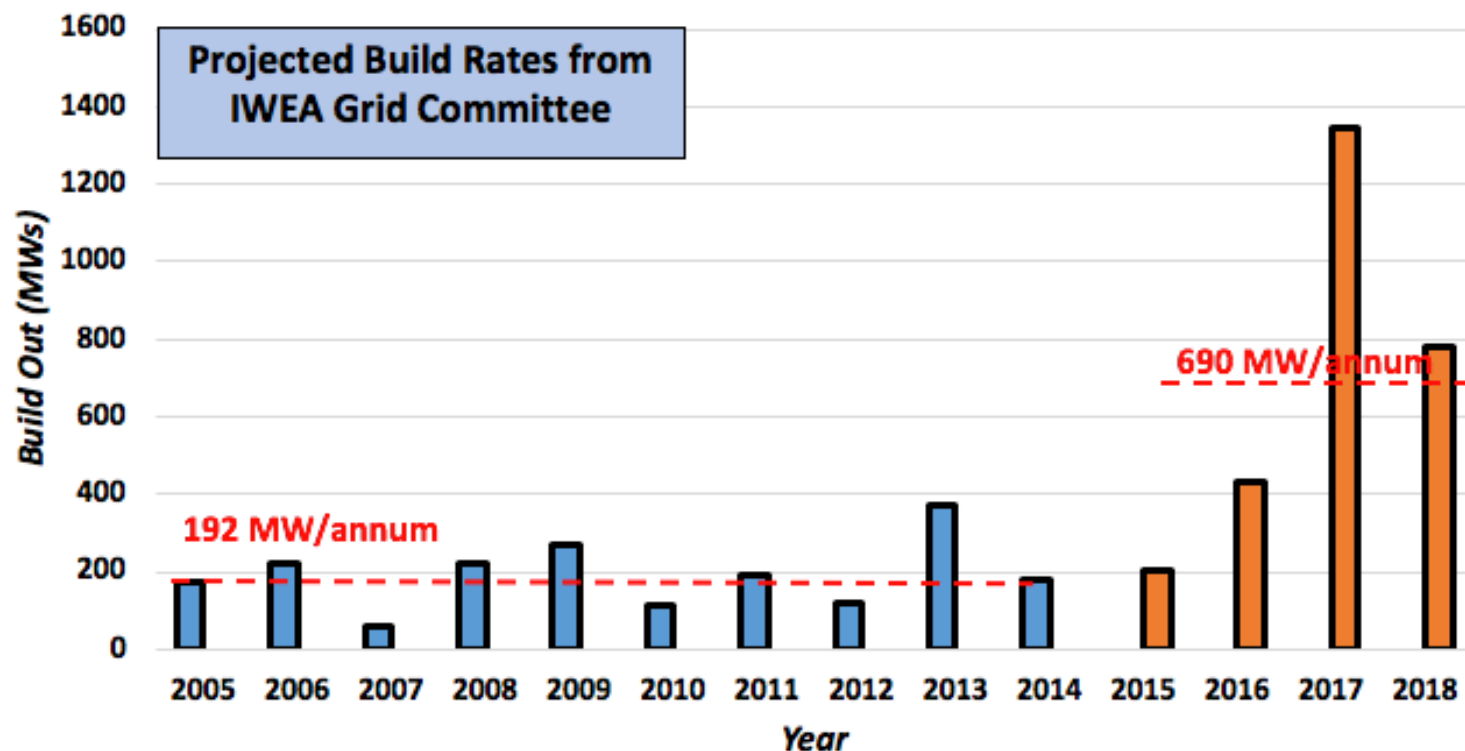
# Supply Chain Challenges

- The challenges are markedly different from those of 2015
  - The supply expanded as required
  - How to retain scale and competence?
  - Will developers have unrealistic expectations?
  - How do we plan resources?
  - Will jobs be lost – especially in rural areas?
- The supply chain can deal with fluctuations
- Sharp peaks and potential cliffs are equally challenging
- The RESS delay is hugely disappointing



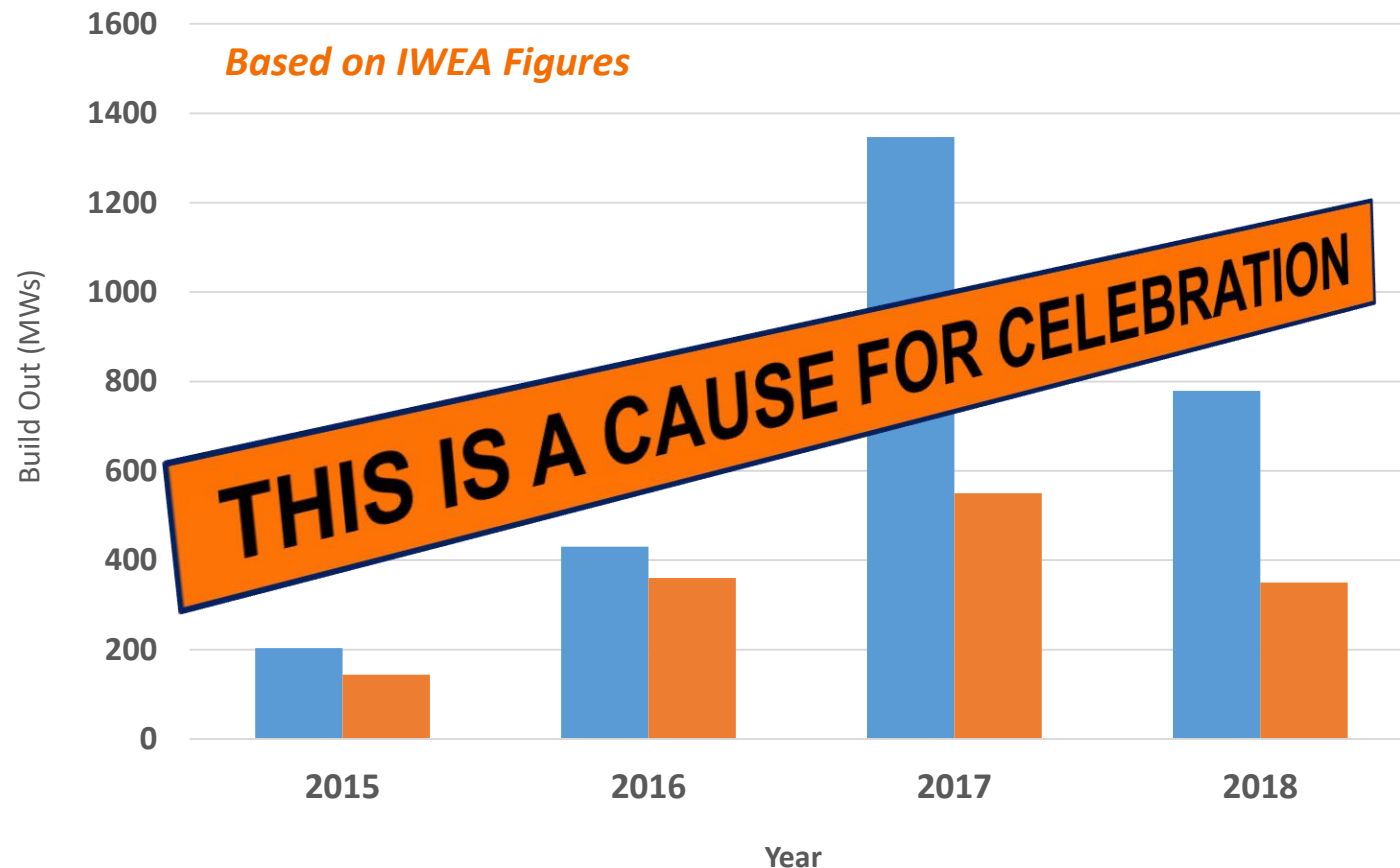
# Change of Scale

## Wind Farm Build Out Rate - ROI



# Change of Scale - Actual

Wind Farm Build Out Rate - ROI





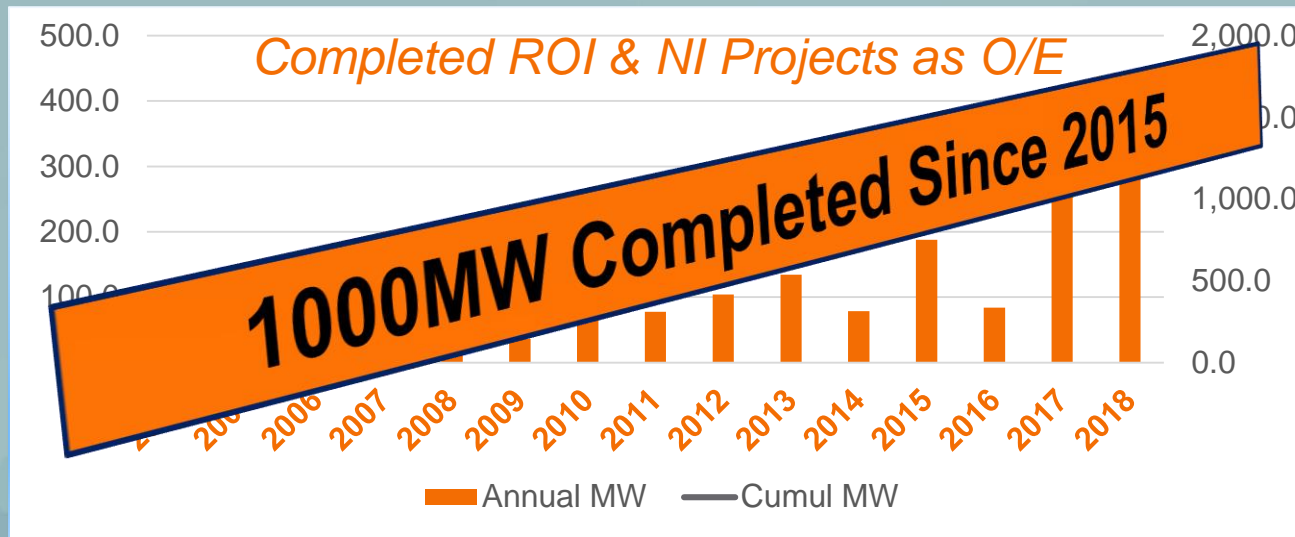


# But Wait...



***“These will be the days that we’ll remember in days to come....”  
(Tom Robinson)***

# Ionic as a Positive Example



## How do we thrive post-REFIT 2?

- Exporting **skills to Scotland** – Bentry strategy
- Providing more **strategic advice** to the market
- Embracing new opportunities through **partnership**
- Will be here and **ready for RESS** – whenever it comes

# Conclusion

- RESS delay is a major headache for the supply chain
- Not as easy for contractors – some casualties already
- Post-REFIT market needs competence and competition
- But let us take a moment to smell the flowers
- The delivery of REFIT2 is an astounding achievement
- All elements of the supply chain should be very proud
- It proves that the Irish Wind Industry can deliver
- But we must be given the chance....



**TONIGHT I'M GONNA PARTY LIKE**



**IT'S 2019**

A scenic background image of a mountain range with snow-capped peaks and a calm lake reflecting the mountains. The sky is filled with soft, white clouds.

# Thank You!

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