

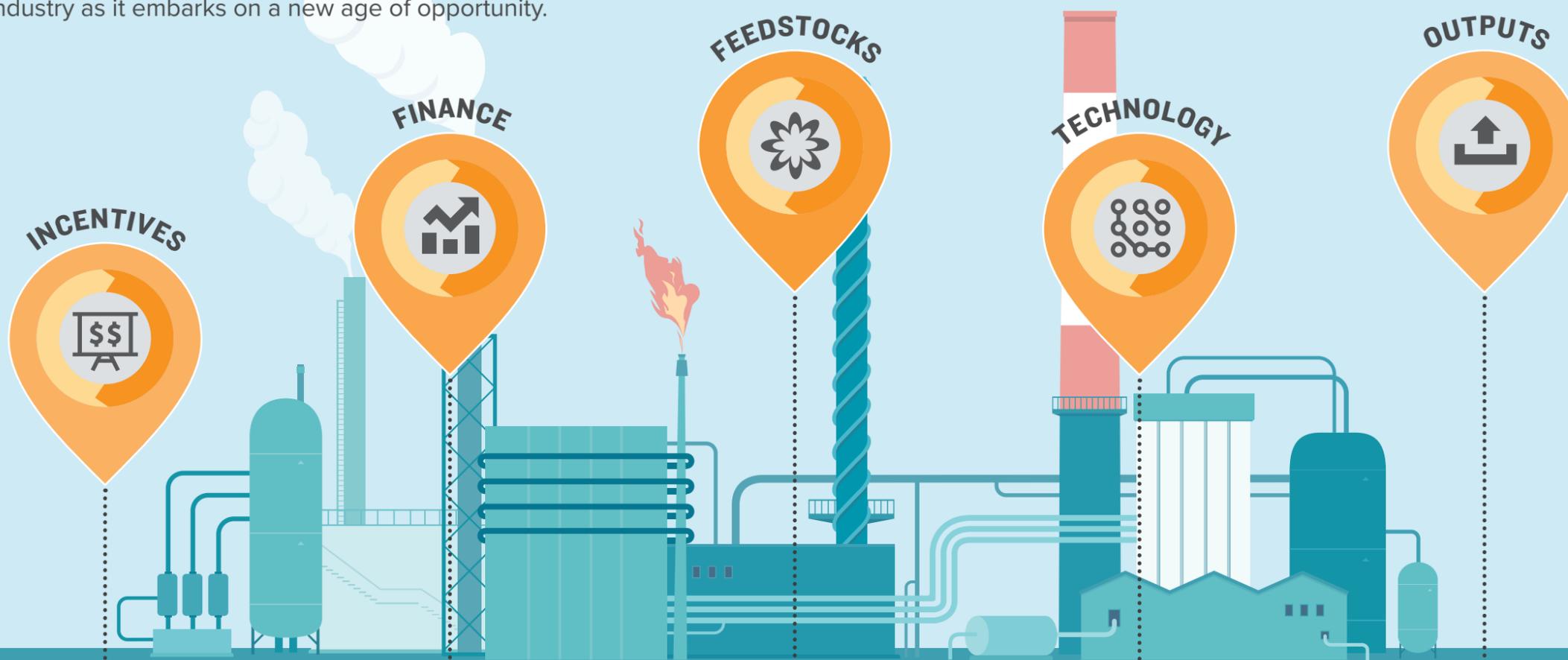
MAPPING THE ROUTE TO WASTE-TO-ENERGY PROJECT SUCCESS

Over 200 industry leaders gathered in London for the **2017 World Waste to Energy & Resources Summit** to debate what the future holds for the waste-to-energy sector. Their findings represent a compelling vision for the industry as it embarks on a new age of opportunity.

SAVE THE DATE



WORLD WASTE TO ENERGY AND RESOURCES SUMMIT
London, May 23-24, 2018



Increasing numbers of projects will be developed outside of ROC and Contract for Difference schemes

Heat networks will eventually be incentivised by Government and integrated into urban planning

Additional landfill tax and RDF export tax will incentivise domestic capacity in the UK

Decarbonisation of the UK national grid will present an attractive market opportunity for synthesis gas

Equity lenders will look to manage risks in different ways as subsidies are no longer available

“Circular” waste management projects will prevail with guarantees, equity and other risk-bearing mechanisms

EU mechanisms such as the European Fund for Strategic Investments and programmes like Horizon 2020 will push projects through

Revenue generation and new approaches to project delivery and finance will be essential to access emerging markets

Feedstock will be top priority, with guaranteed volume and calorific value two of the most important success factors

Mixed waste as a feedstock will fall due to separate collection obligations and more ambitious EU recycling targets

Homogeneous feedstock will be more favourable for ACT projects with mixed feedstock contributing to higher failures

Securing a long-term feedstock contract from a tier one waste supplier will be necessary to provide financial security

Expect to see projects emerging that prove viability of ACT at commercial-scale operation

Clear, tangible benefits will be vital when deciding between gasification and conventional WtE projects

New technologies with high environmental performance will prove more effective in gaining public support

The track record of the EPC provider in delivering technology will become as important as the technology itself

Project developers will need to secure private heat off-takes to maximise revenue streams

Geographic location will play an increasingly important role in the ability to distribute outputs

The greatest potential for higher value outputs and renewable heat networks will come from C&I projects

Innovations in ash recycling will gain traction, including metals and mineral recovery, and ash as a construction aggregate