



Views on Offshore Wind Sector Deal, Round 4 leasing & Future Challenges in Offshore Wind



Introduction

- › Business & Strategic Development Manager for Global Offshore Wind Market & Co Chair of the Friend of Floating Offshore Wind
 - › *Involved in offshore wind since 2009*
 - › *Chartered Civil Engineer with Over 18 years experience*



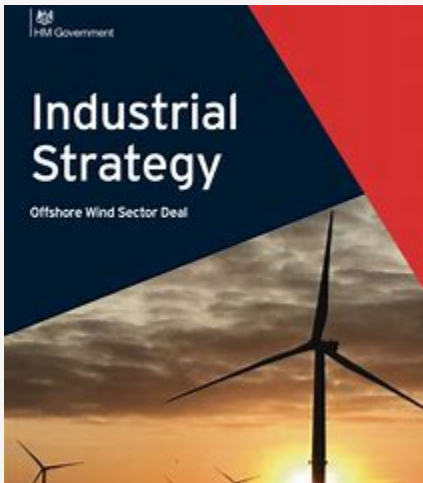
An aerial photograph of an offshore wind farm under construction. A large white and red supply vessel is positioned on the left, with a massive blue crane lifting a yellow lattice tower section into the air. Several other smaller support vessels are visible in the surrounding blue water. The sky is a soft, hazy orange, suggesting dawn or dusk. The text "EXCITING TIMES FOR OFFSHORE WIND !!!" is overlaid in white on the right side of the image.

**EXCITING TIMES FOR
OFFSHORE WIND !!!**

Offshore Wind Sector Deal

7th March 2019

The Offshore Wind Sector Deal builds on the United Kingdom's global leadership in offshore wind, maximising the advantages for UK industry from the global shift to clean growth



- **Visibility of future** CFD Round with support of up to £557 million, **auctions every two years**.
- The sector committing to increase UK content to **60% by 2030**, including increases in the capital expenditure phase.
- **Increasing the representation of women** in the offshore wind workforce to at least **a third by 2030**.
- Setting an ambition of **increasing exports fivefold to £2.6 billion by 2030**.
- The sector **will invest up to £250 million in building a stronger UK supply chain**, establishing the **Offshore Wind Growth Partnership (OWGP)** to support productivity and increase competitiveness.



Contract for Difference (CFD)

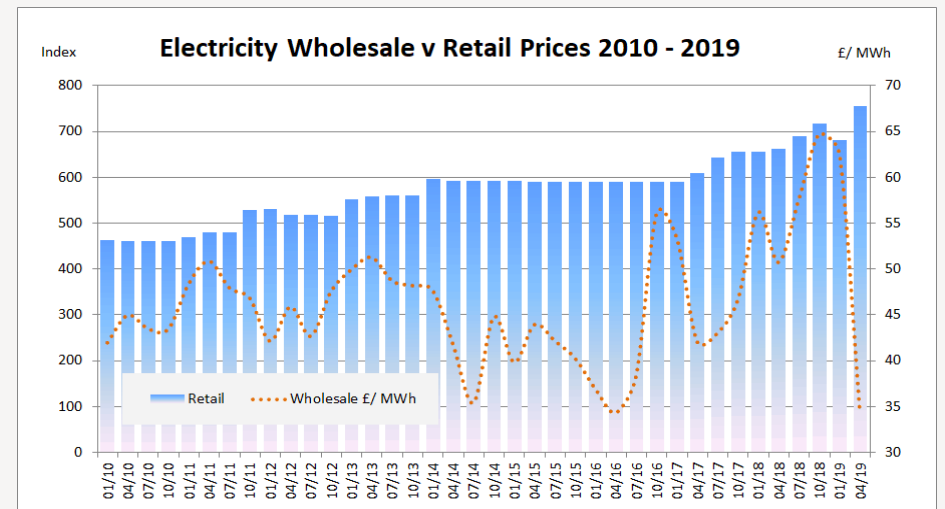
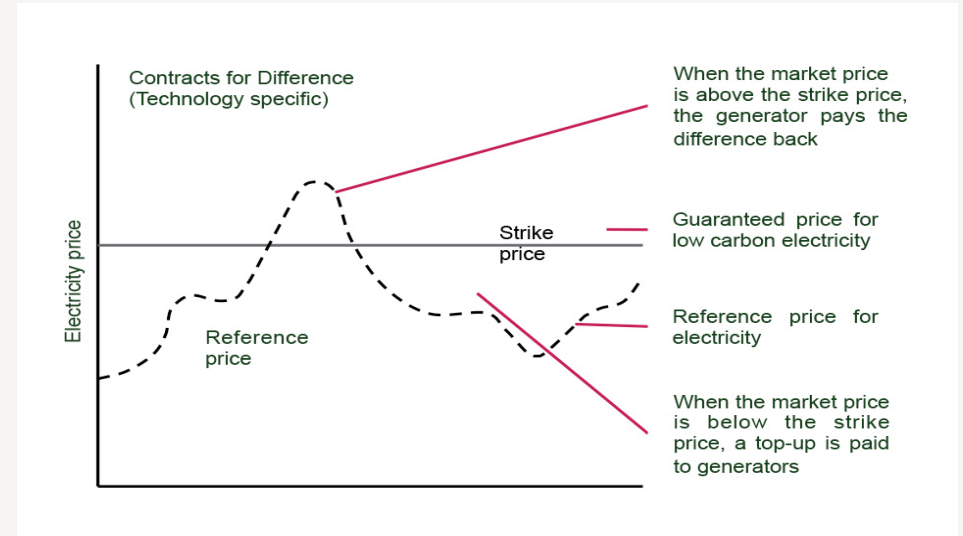
Milestone event yet again reached for Offshore Wind Industry on 20th Sept 2019

Six offshore projects - Combined capacity of 5,466MW (capped at 6GW)

Price range of £39.65-41.61/MWh - 31% lower than last tender and 50% reduction on 1st auction

Offshore wind strike prices fell by almost a third in the UK's latest CfD tender.

Offshore Wind firmly being recognized as part of the Global Energy mix and being central to meeting Renewables targets and Net Zero objectives



UK Leasing Rounds - Round 4 & Extensions

Round 4

The Crown Estate has officially opened the Round 4 offshore wind leasing competition for the rights to develop 7GW – 8GW of new capacity off England and Wales with the issuance of the pre-qualification questionnaire (PQQ).

PQQ due by at end of November 2019

ITT to be between Feb – June 2020 with final awards in Sept 2020

HRA for sites will run Autumn 2020 to summer 2021

Agreement for Lease finalised in Autumn 2021

Extensions

In August 2019, The Crown Estate confirming that seven extension projects, (~2.85GW), would progress to the award of development rights. Projects Include:

- Sheringham Shoal offshore wind farm
- Dudgeon offshore wind farm
- Greater Gabbard offshore wind farm
- Galloper offshore wind farm
- Rampion offshore wind farm
- Gwynt y Môr offshore wind farm
- Thanet offshore wind farm

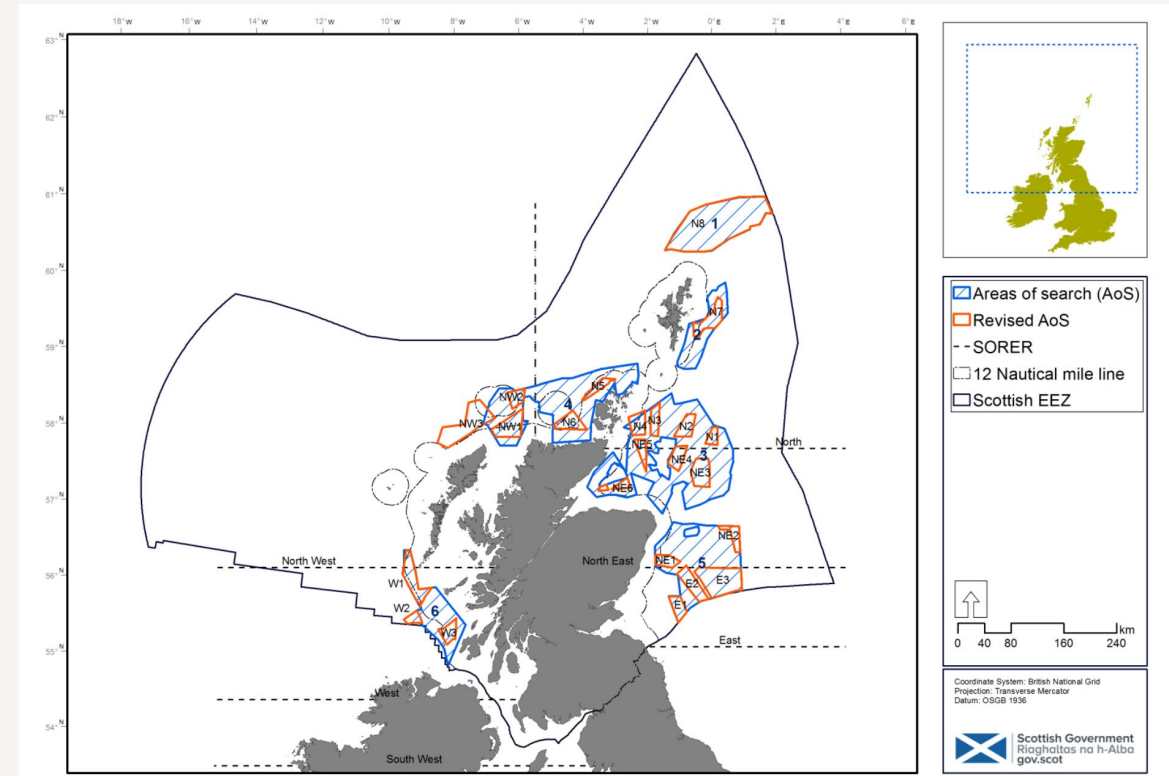


UK Leasing Rounds - ScotWind

Crown Estate Scotland has confirmed plans to hold the launch of ScotWind Leasing until after the publication of Marine Scotland's draft Sectoral Marine Plan (SMP), which is expected in Autumn 2019.

Fixed & Floating Wind sites

Challenge – Commercialization of Floating Wind Technology & Support Mechanism



Offshore Wind Challenges

Continued Pace of WTG Development

Deeper waters & further offshore

Challenging Environmental & Ground Conditions

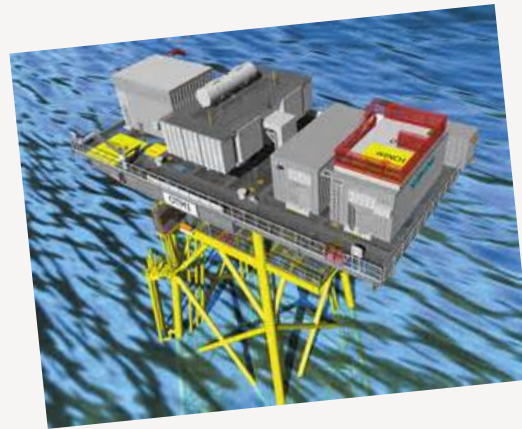
Realising Cost Reduction

Collaboration

Innovation

Standardising

Repeatability



Environmental Challenges

Stakeholder Interface & Challenges

Commercialisation of Floating Wind

Supply Chain Support

Further advancement of Technology & innovation

HVDC

Electricity System Balance

Global Market Growth



THANK YOU!

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