



EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION



Offshore wind from EU perspective

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Around 700 members from almost 60 countries

- Manufacturers with a leading share of the global wind power market
- Component suppliers
- Research institutes
- National wind and renewable associations
- Developers
- Electricity providers
- Finance and insurance companies
- Consultants
- Contractors

This combined strength makes EWEA the world's largest and powerful wind energy network

EWEA's leading members



Agenda

- The European offshore wind industry is growing solidly
- Bringing significant benefits to the EU
- Member States are however lagging behind their targets
- Planning is the first step to sustainable growth



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The offshore wind industry is growing solidly

- 6 GW installed in Europe or 1,939 turbines
- Capacity doubling in first six months - 2013
- Meeting 0.5% of the total EU electricity demand
- 48,000 people employed

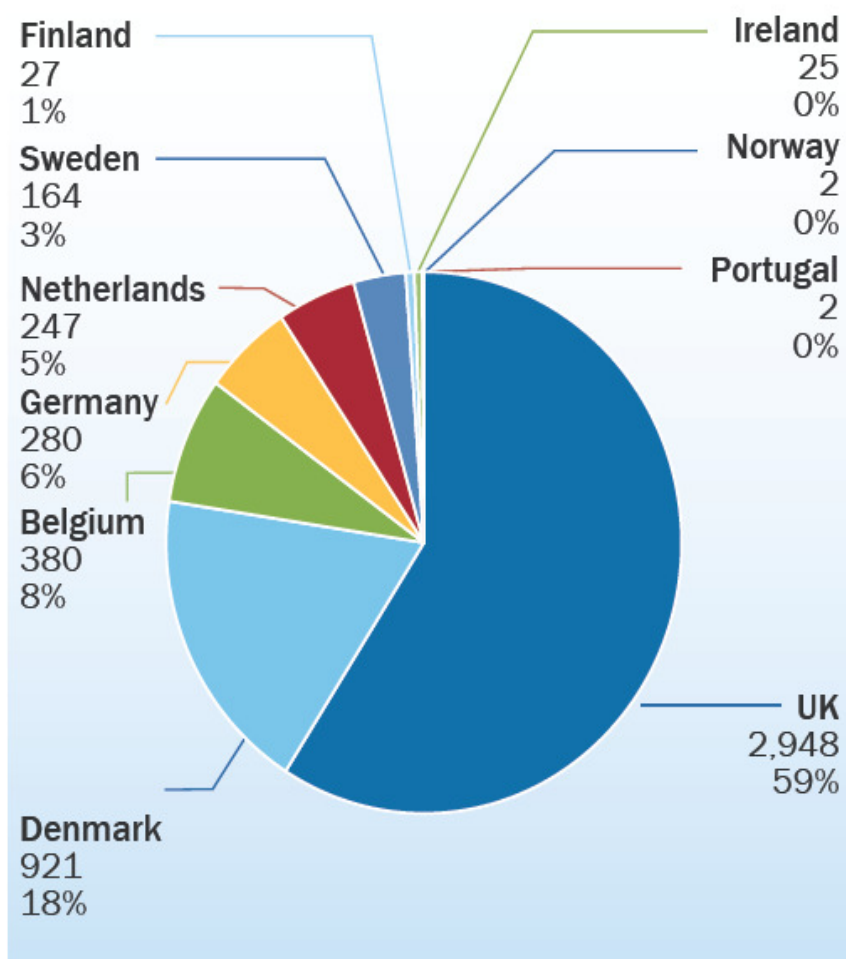


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It is a European industry dominated by the UK

FIG. 12: INSTALLED CAPACITY - CUMULATIVE SHARE BY COUNTRY, (MW).

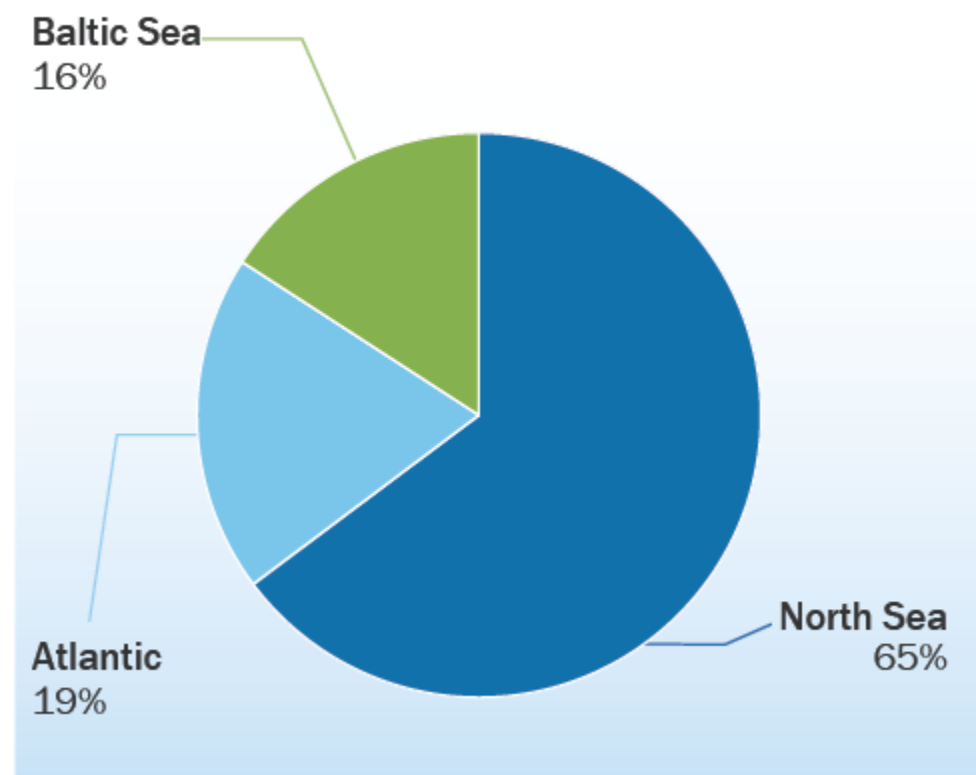




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With 65% of market shares in the North Sea

FIG. 14: INSTALLED CAPACITY, CUMULATIVE SHARE BY SEA BASIN



Agenda

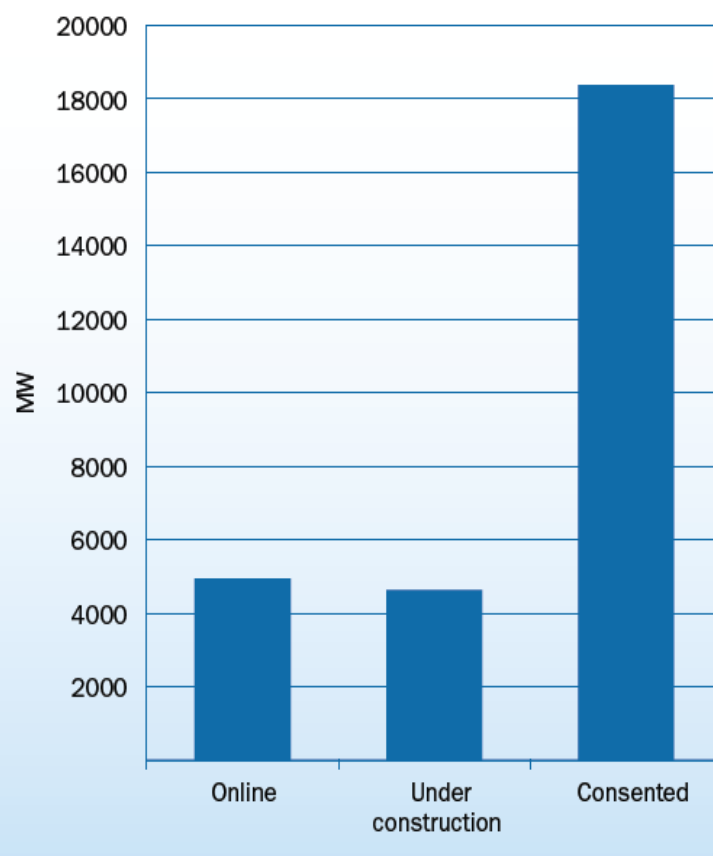
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- **Bringing significant benefits to the EU**
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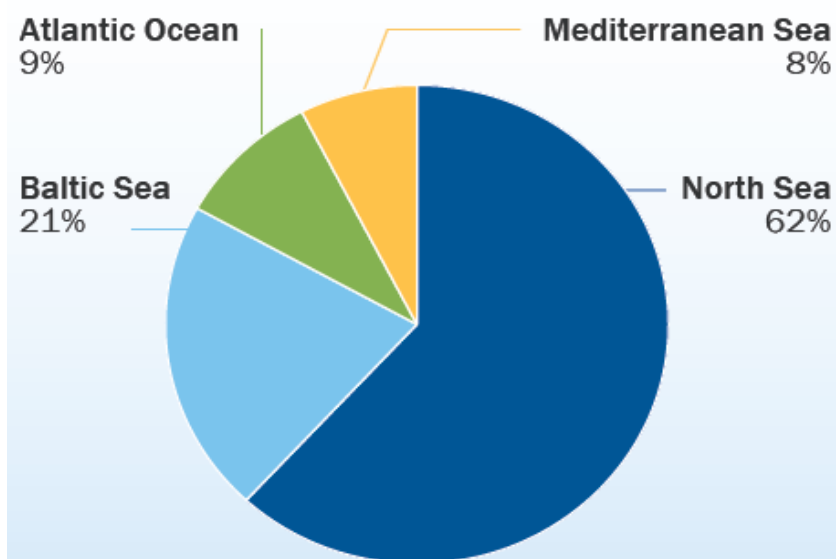
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This is the beginning of a major industrial development

Offshore market: projects online, under construction and consented (MW).



Share of consented offshore wind farms by sea basin





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Offering long term opportunities

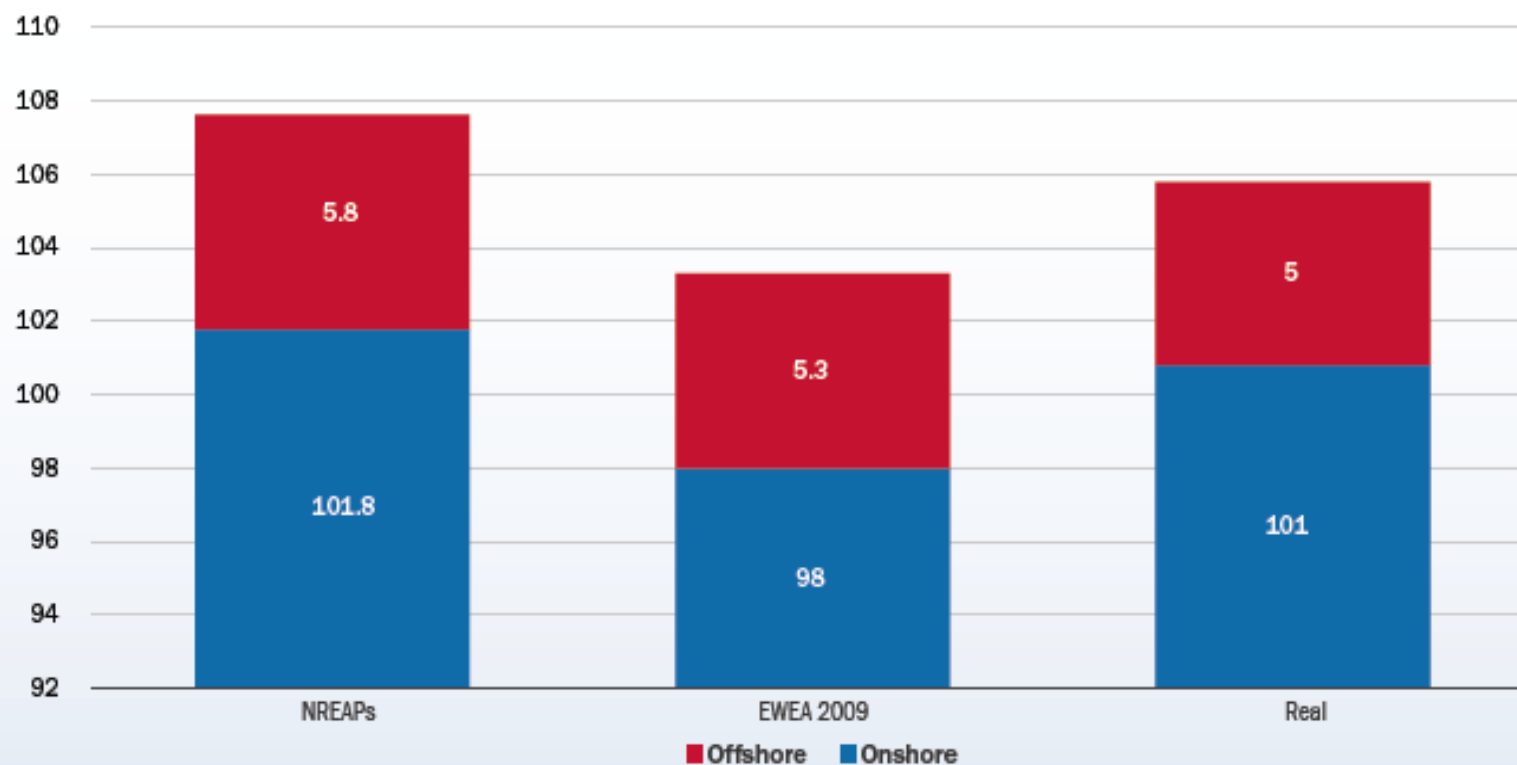
- 40GW installed in Europe by 2020
- 150GW by 2030
- Meeting 4% of the EU electricity demand in 2020 and 14% in 2030
- Around 190,000 jobs in 2020 and 320,000 in 2030

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Member States are however lagging behind their targets

FIGURE 4.1 WIND POWER CAPACITY TARGETS (NREAPS AND EWEA 2009) AND REAL (MW)



Offshore wind development faces challenges

- Lack of regulatory certainty,
- Offshore grid deployment,
- Supply chain bottlenecks,...

COST REDUCTION

We need political commitment

A VISION

- A 2030 package with ambitious and binding RES targets

A CLEAR COMMITMENT TO REACH IT

- Clear and stable support mechanisms
- Developing the energy infrastructure
- A European industrial strategy
- Innovation and R&D policy
- Maritime Spatial Planning policy

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Maritime spatial planning:

- A neutral tool
- to organise and optimise the sea space
- in view of the different economic, environmental and social objectives
- defined at national and European level

VISION

Planning is the first step to sustainable growth

- Providing the necessary investment certainty
- Easing permitting and licensing procedures
- Avoiding sectoral conflicts
- Bringing projects costs down through an optimum integration into the marine environment (good sea data management)
- Facilitating cross-border projects and synergies (e.g. North Sea offshore grid, wake effects)

Key messages

- Focus on cross-border cooperation
 - National planning developed in similar timeframe
 - Flexibility through updated plans
- Common vision up to 2030 integrating the objectives agreed at national or EU level



EWEA OFFSHORE 2013 Conference & Exhibition

19–21 November 2013

Messe Frankfurt, Frankfurt, Germany



EWEA 2014 Annual Event

10-13 March 2014

Fiera Barcelona, Barcelona, Spain





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Thank you very much for your attention

www.ewea.org
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