

Offshore wind – a broader perspective

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Snapshot of UK Offshore Wind Assets



Offshore
Turbines

Offshore
Substations

Export
Cables

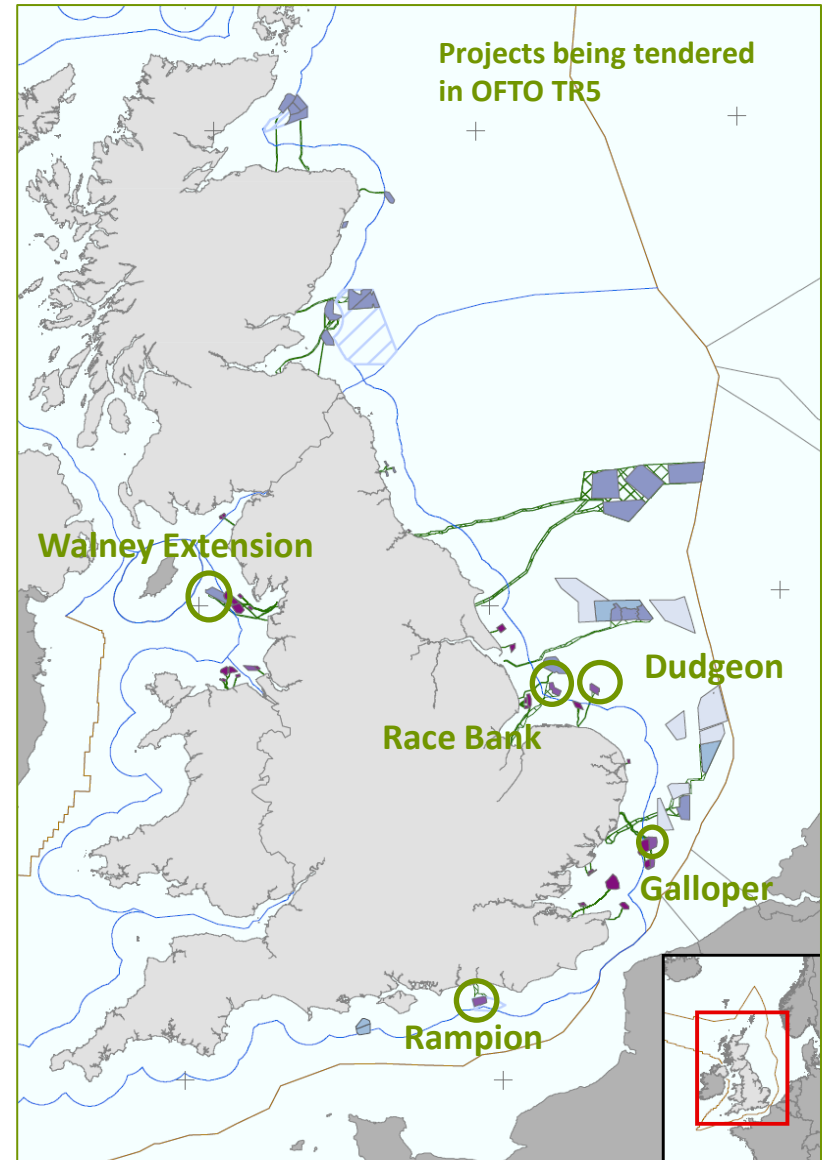
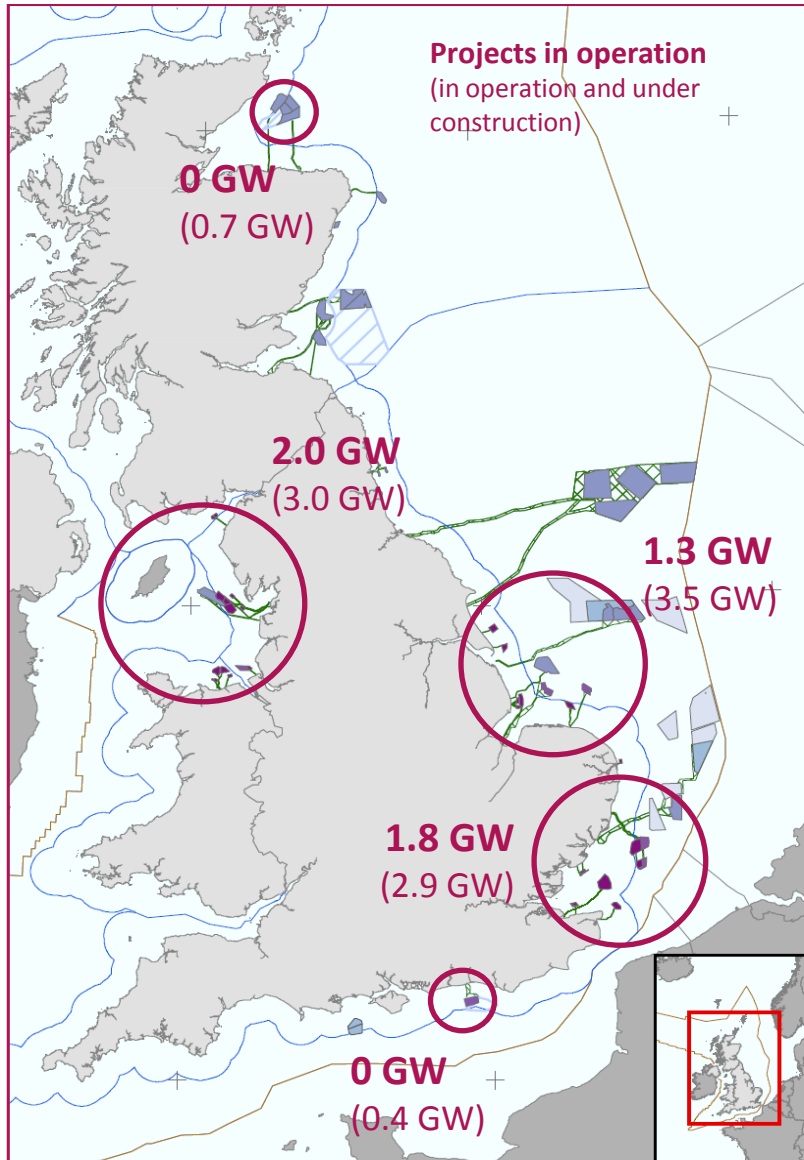
Offshore
Masts

Wind
Farms

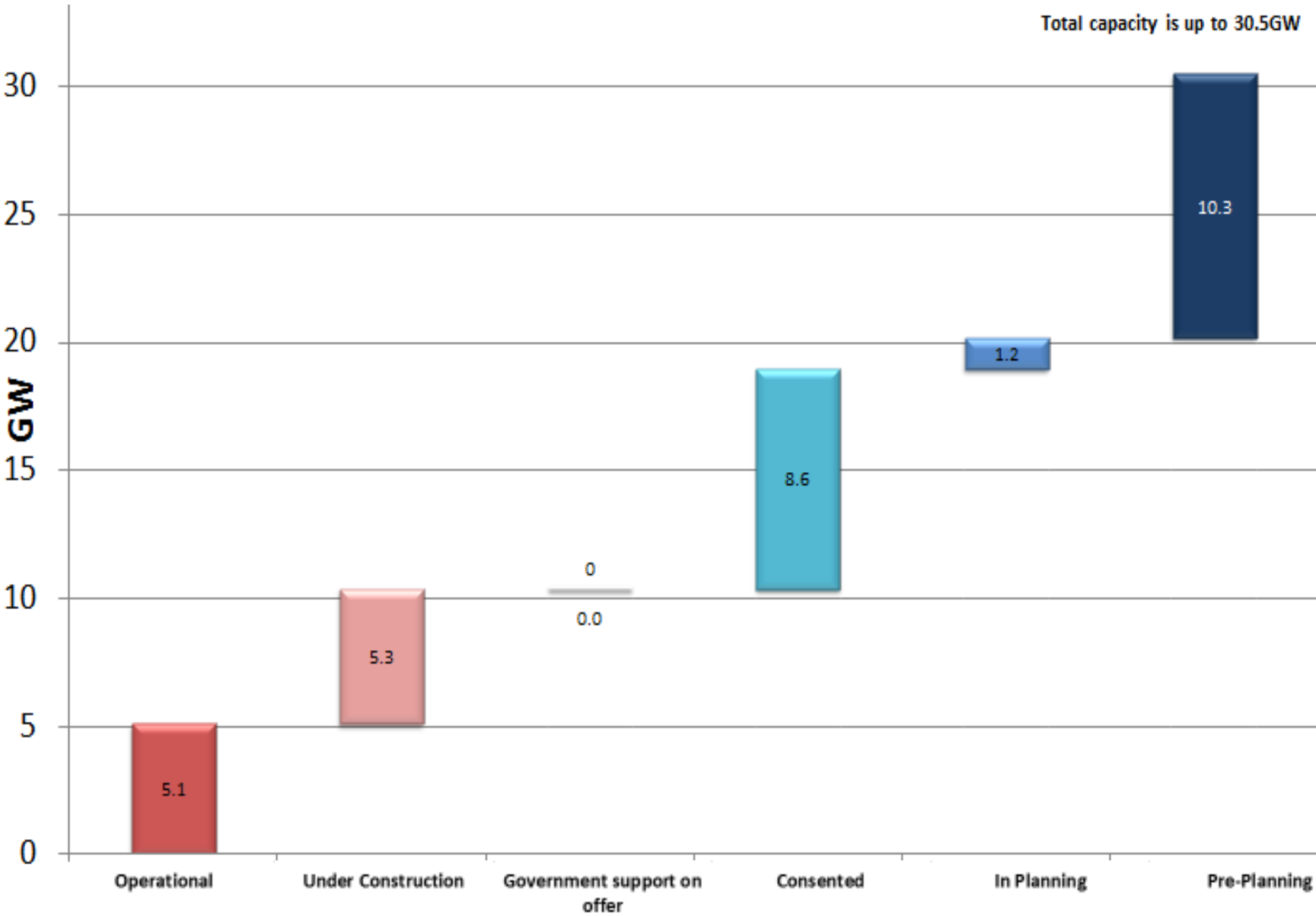
July 2016

1463	20	56	24	29	Operating
538	10	15	1	9	Under Construction
291	4	11	0	4	Reached FID
2294	34	82	25	42	TOTAL

Current OW capacity; and projects in OFTO TR5

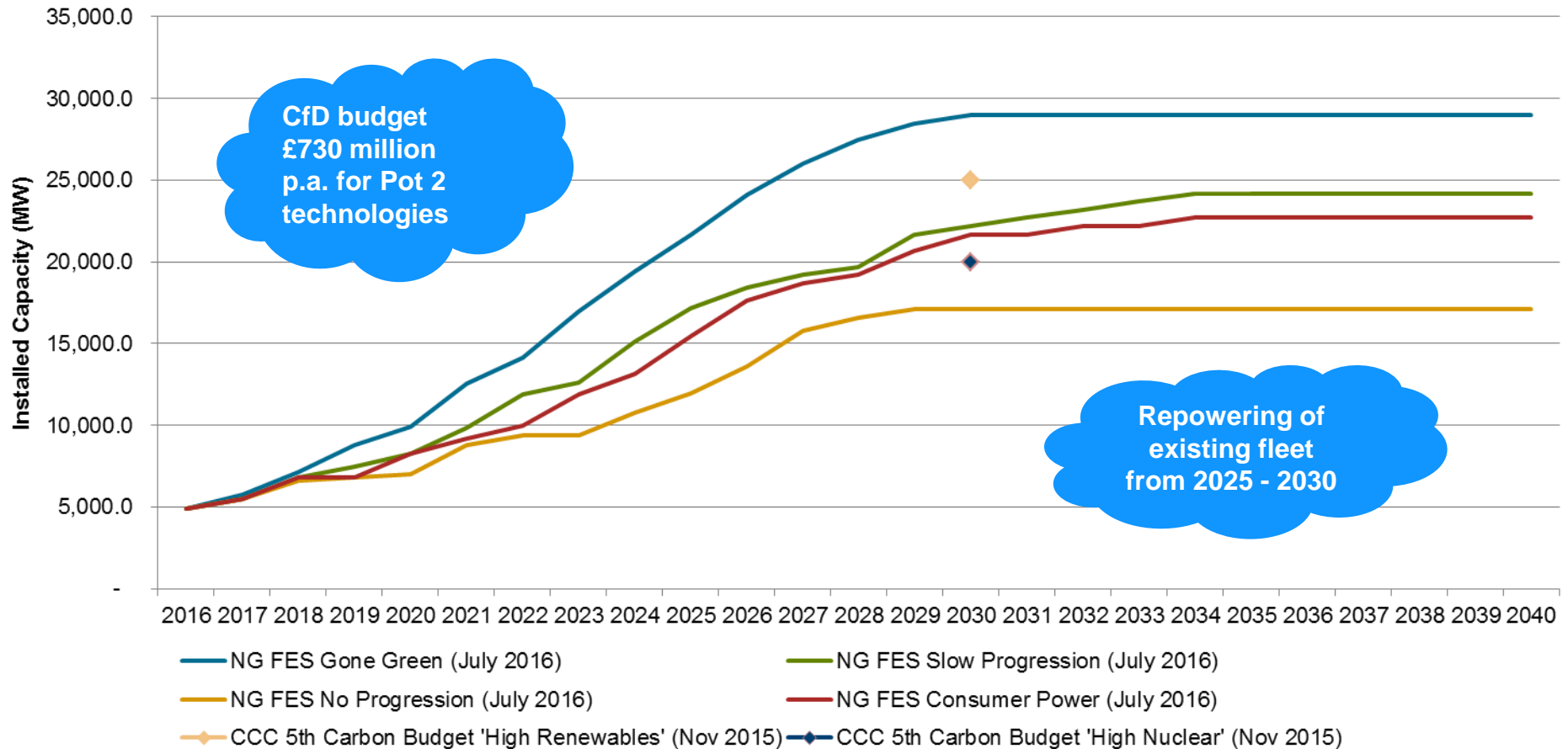


UK offshore wind portfolio

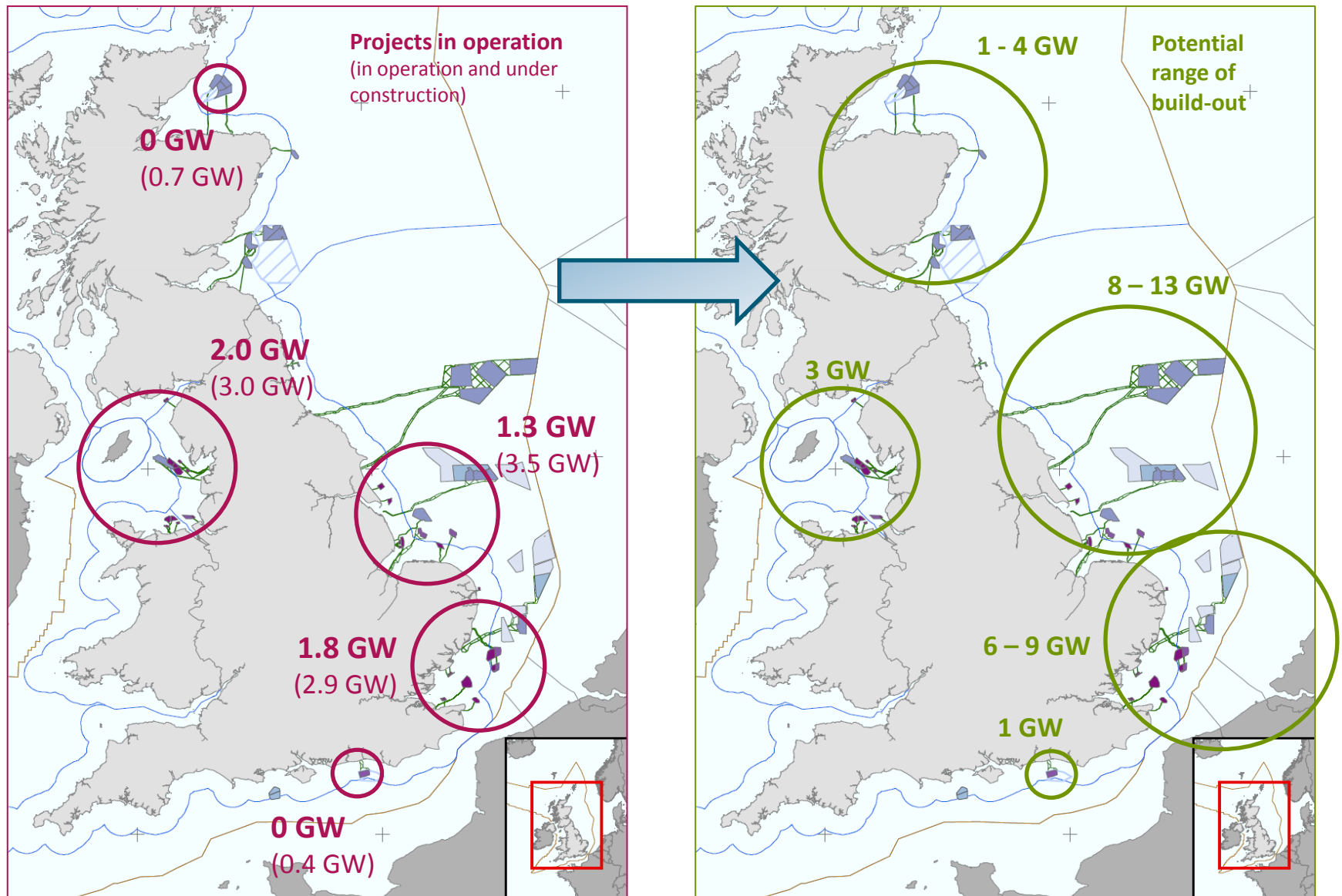


Future demand for OW generation

Offshore Wind Scenarios



OW spatial distribution 2016 – 2030s



Summary

- Offshore wind a mature part of the UK's energy mix
- Market demand for new generation creates growth opportunity for offshore wind infrastructure
- Growth drivers include:
 - Technology cost competitiveness
 - System integration
 - Creation of a durable industry
 - Regulatory clarity
- Already a £30 billion market, with £15+ billion new opportunity