

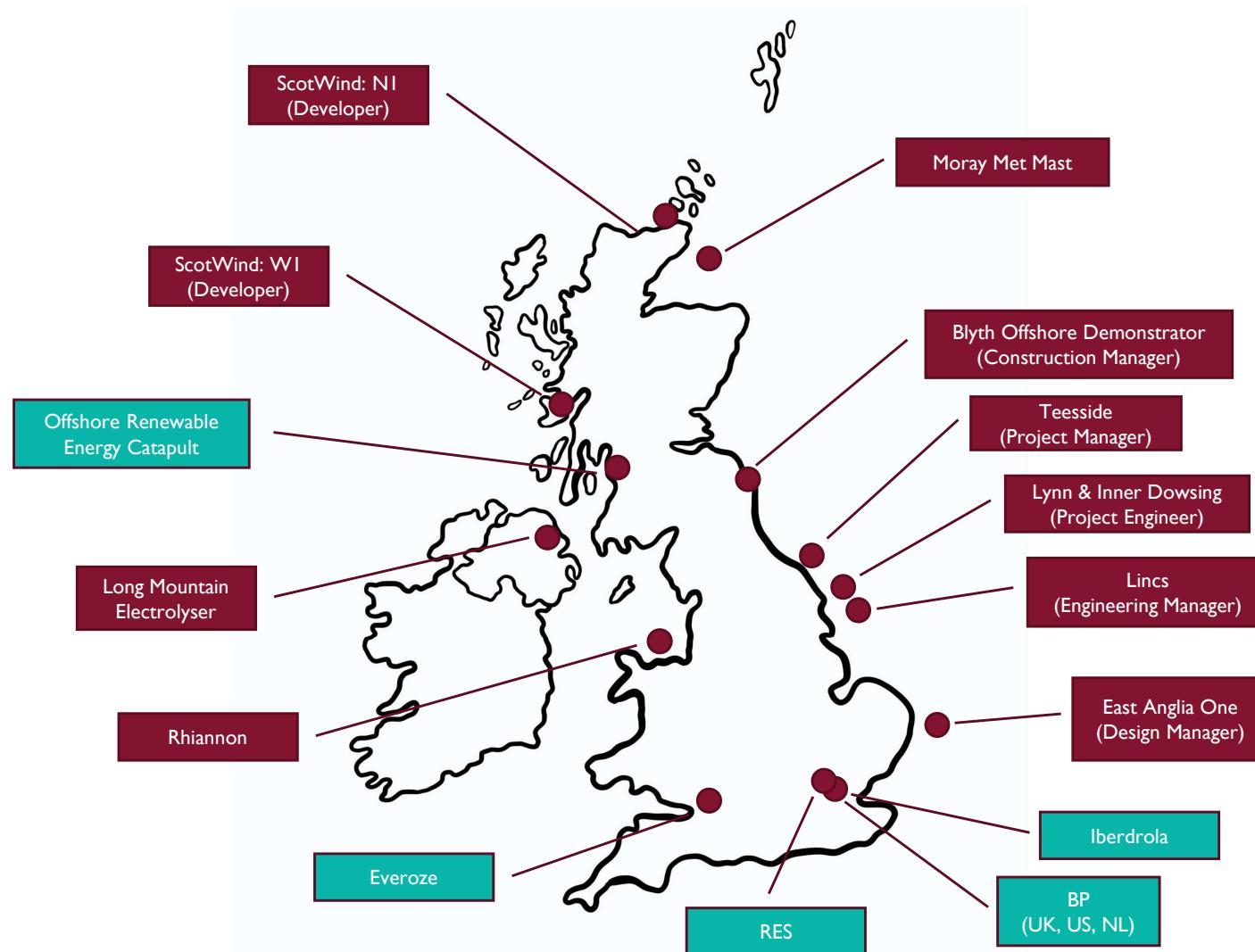


# Wind Power

## Technology Trends, Economic and Environmental Issues

David Woodhead  
20<sup>th</sup> Nov 2023

# ME – 10 years in offshore renewables



Development, design, construction, innovation, financing...

# CONTENTS

---

## 1 Lecture I - Wind Power Technology

- Global Wind Industry
- UK Wind Industry
- Turbine Technology Trends
- Constructing a Windfarm
- Consenting a Windfarm
- Environmental Impacts

## 3 Lecture 2 - Economics of Wind Power

- Power Markets
- Support Mechanisms
- CAPEX Cost Trends
- Investment

## 2 Tutorial - Part 1:

- Innovation for cost reduction

## 4 Tutorial - Part 2:

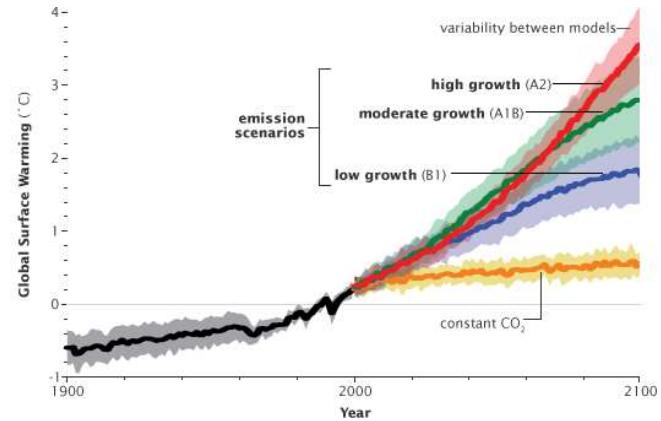
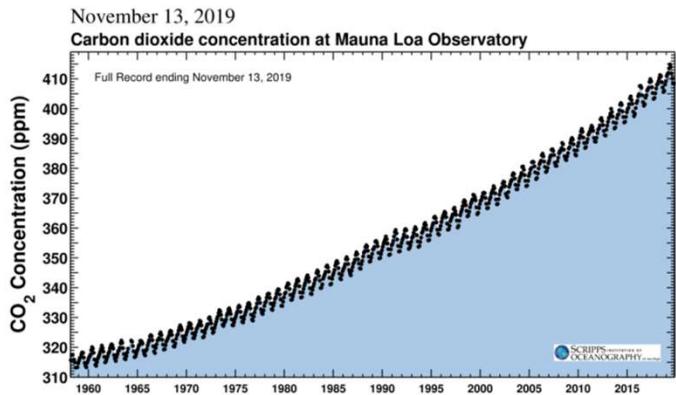
- Competitive CFD Auction

# I

## Lecture I - Wind Power Technology

- Global Wind Industry
- Turbine Technology Trends
- Constructing a Windfarm
- Consenting a Windfarm
- Environmental Impacts

# CLIMATE CONTEXT



COP23 FIJI  
UN CLIMATE CHANGE CONFERENCE  
BONN 2017



COP24 · KATOWICE 2018  
KONFERENCJA NARODÓW ZJEDNOCZONYCH  
W SPRAWIE ZMIAN KLIMATU



COP 26 GLASGOW  
UNITED NATIONS  
CLIMATE CHANGE  
CONFERENCE  
NOVEMBER 2020



Climate Change Act 2008



everoze

# WIND POWER

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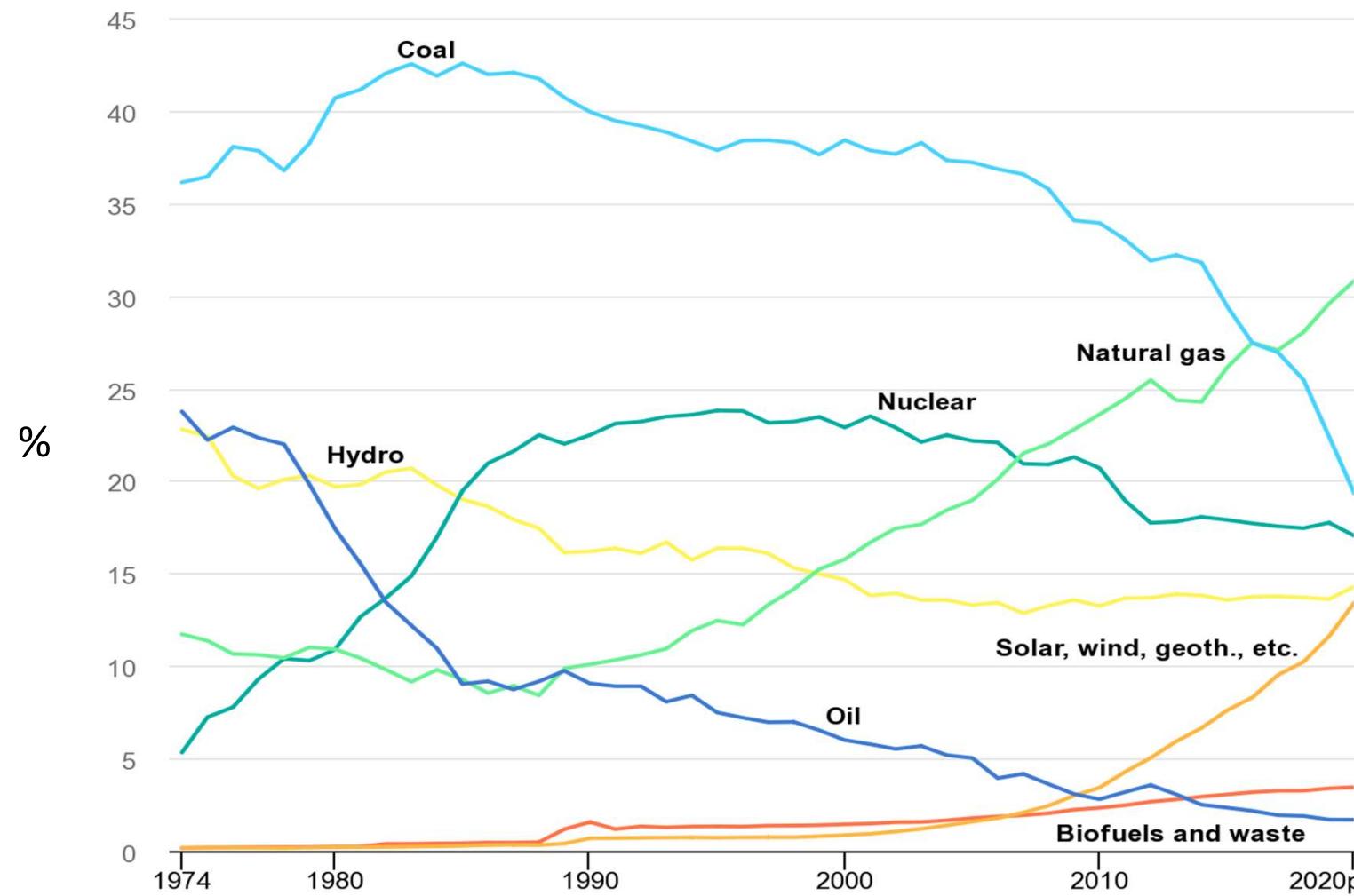
ZERO CARBON ?



# WIND POWER

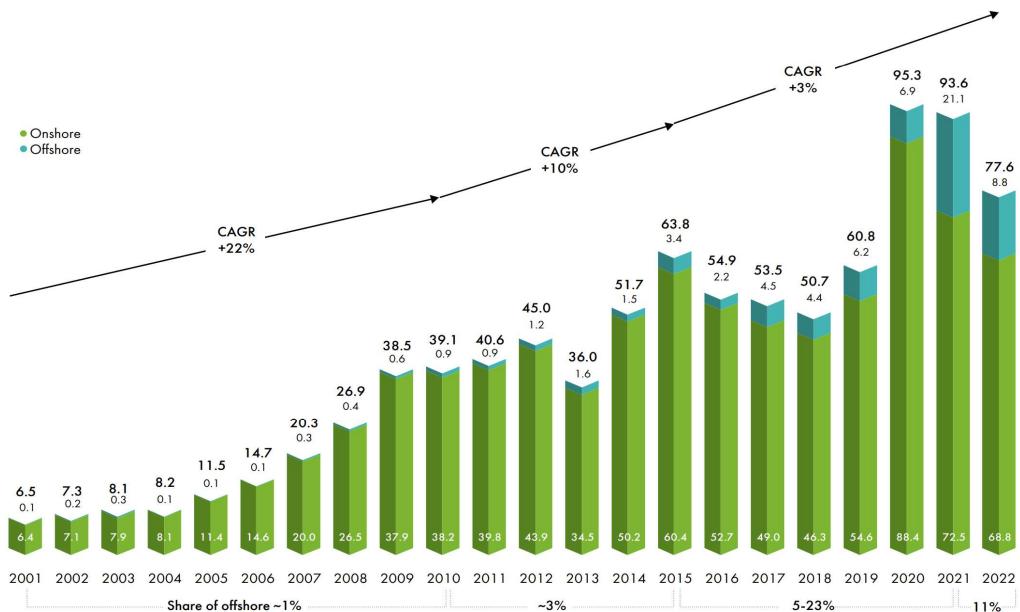
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Share of OECD gross electricity production by source, 1974-2020p



<https://www.iea.org/reports/electricity-information-overview/electricity-production>

# GLOBAL WIND CAPACITY



End 2022 Comparison:

Wind - 906 GW

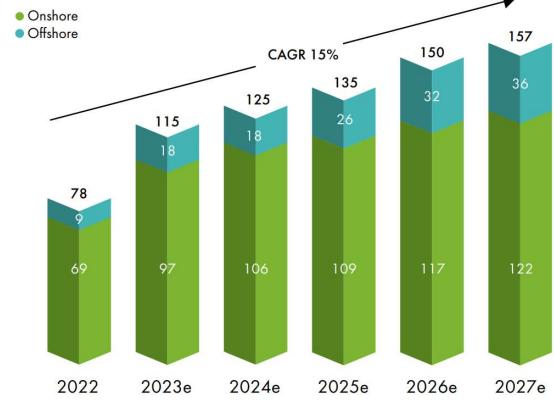
Solar PV – 1,177 GW

Nuclear - 394 GW

Hydro - 1,267 GW

Coal ~ 2,200 GW

New installations outlook 2022–2026 (GW)



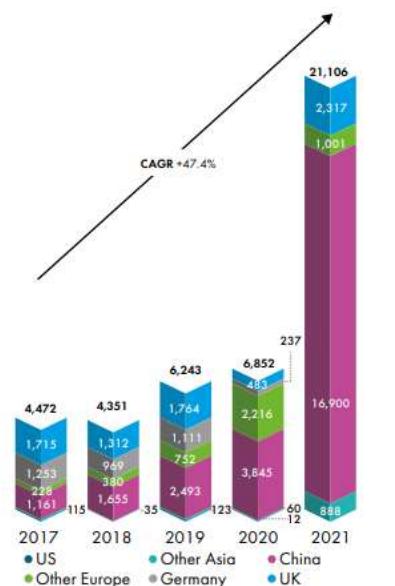
Source: GWEC, 2023

Wind power Investment

~€200bn/year

in 2021

New offshore installation MW

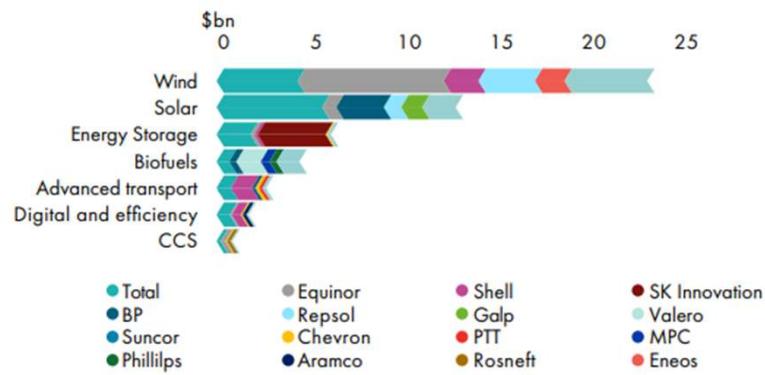


Source – Global Wind Energy Council  
<https://gwec.net/>

# GLOBAL WIND CAPACITY

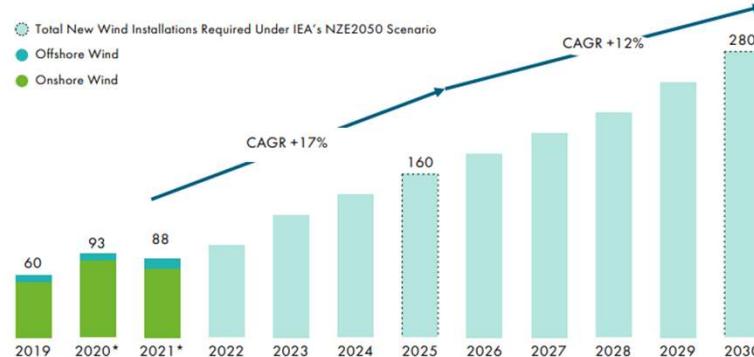


Oil and gas sector investment in low-carbon technologies, 2015-2020



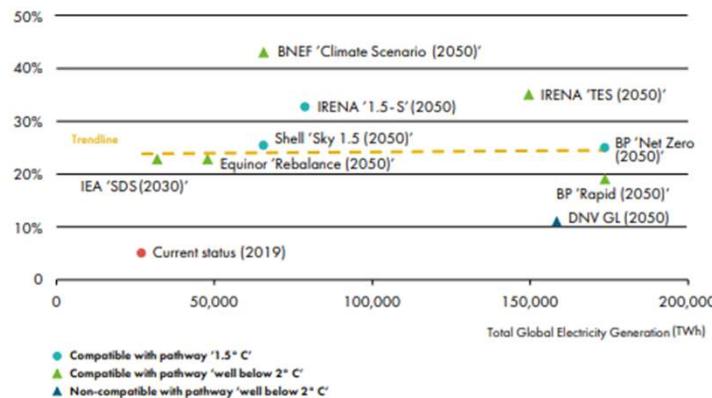
Source: BloombergNEF, company reports

Annual wind installations must increase dramatically to reach net zero by 2050  
New global wind installations (GW)



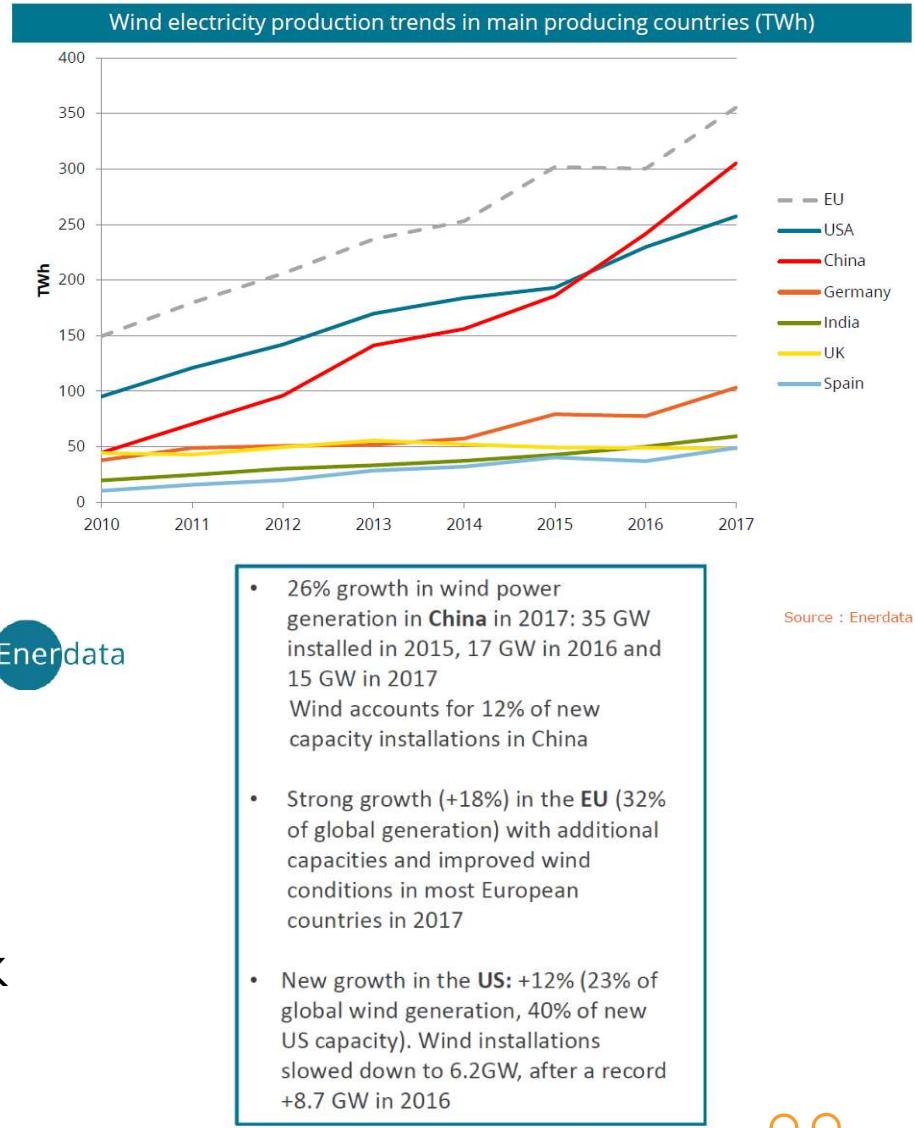
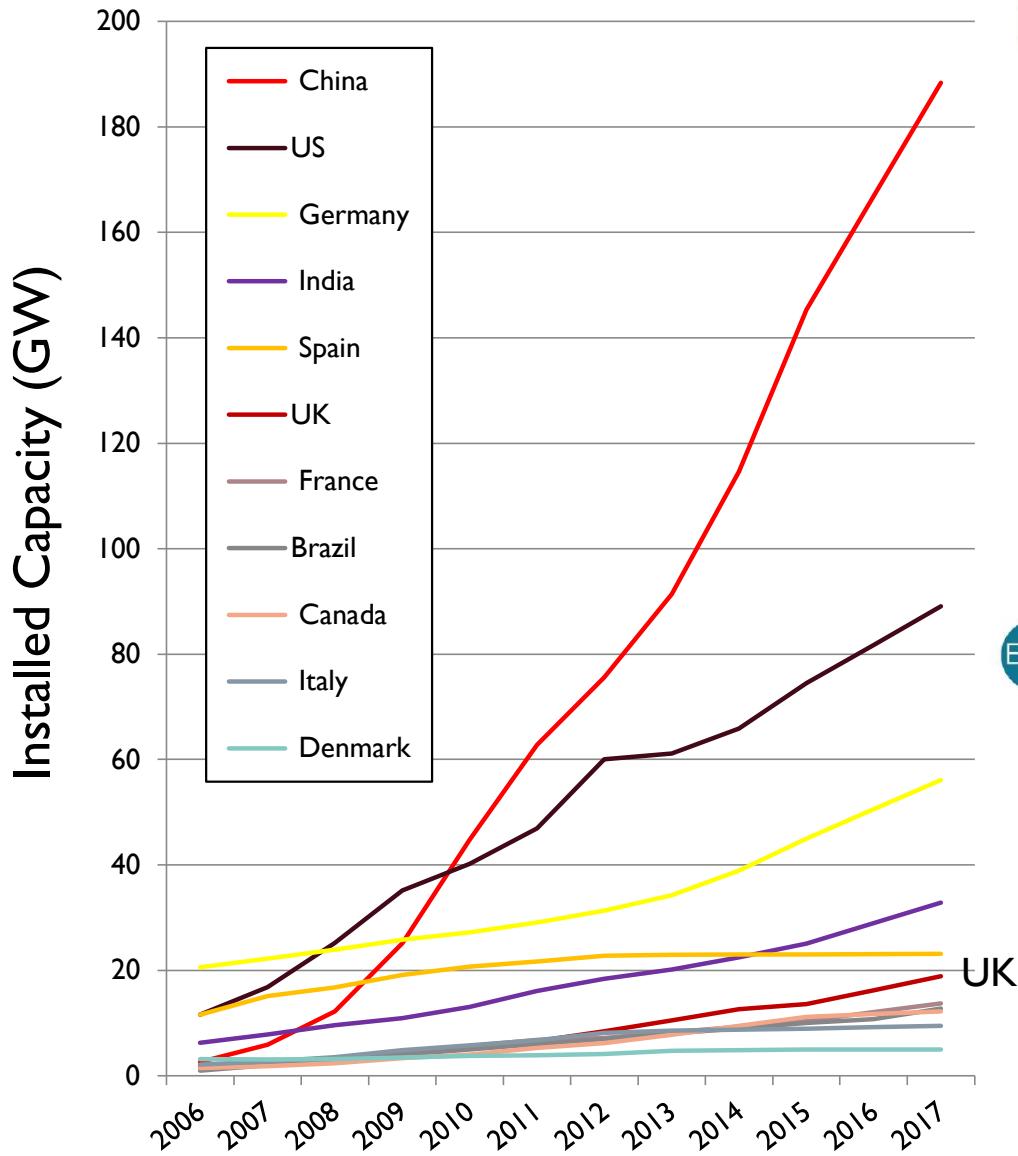
Source: GWEC Market Intelligence; IEA World Energy Outlook (2020), volume in 2022-2024 and 2026-2029 are estimates

Share of wind energy (%) in total global electricity mix versus total electricity generation



Source – Global Wind Energy Council:  
GWEC-Global-Wind-Report-2021.pdf

# INSTALLED CAPACITY vs. ENERGY PRODUCTION



# WIND POWER IN THE UK

---

Nov 2012 vs. Nov 2023:

**7.3 → 29.6 GW**

(Compound Annual Growth Rate +17%)

**Offshore < Onshore**

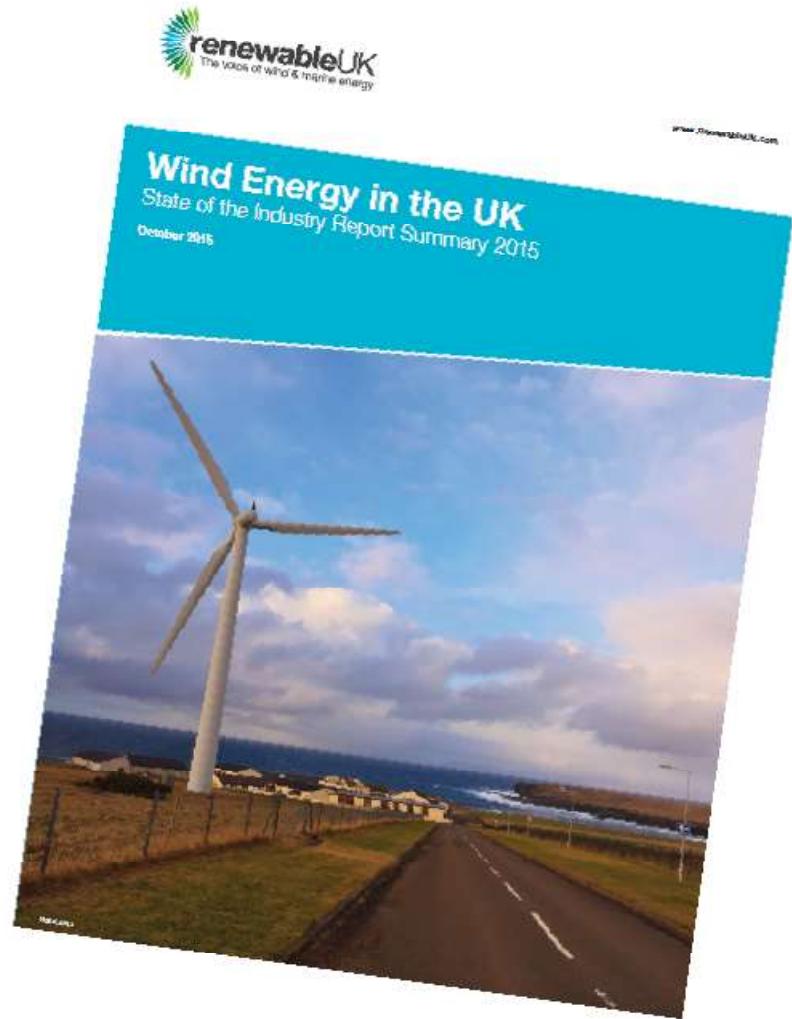
14.7 GW    14.9 GW

**UK 2030 Targets:**

Offshore **50GW**

Onshore ???

Offshore build rate > Onshore build rate



# WIND POWER IN THE UK

**Ørsted**

	Trail Blazers		Record Breakers	
	Onshore	Offshore	Onshore	Offshore
Name	Delabole	Blyth	Whitelee	Hornsea2
Completion	1991	2000	2009	2022
Size (No. x Turbine Size)	4 MW (10 x 0.4 MW)	4 MW (2 x 2.0 MW)	539 MW (215 x 2.5 MW)	1,386 MW (165 x 8.0 MW)



Re-powered 2011  
9.2 MW  
(4 x 2.3 MW)



Decommissioned  
2018

**e.on**



Replaced by:  
Blyth Offshore Demonstrator  
42MW (5 x 8.4 MW)

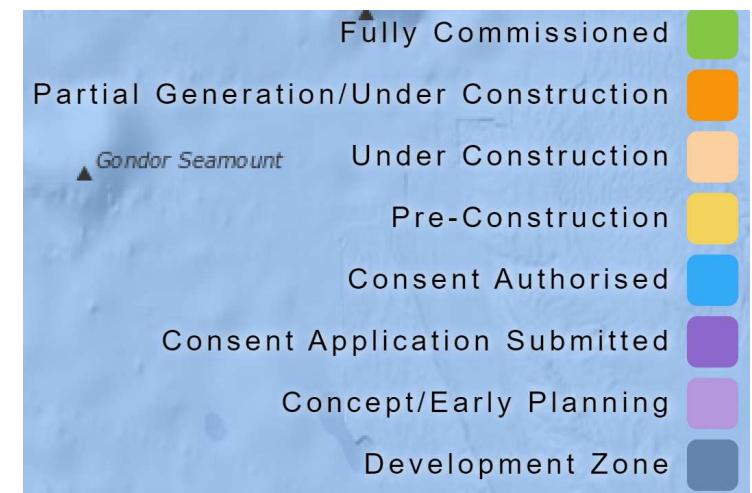
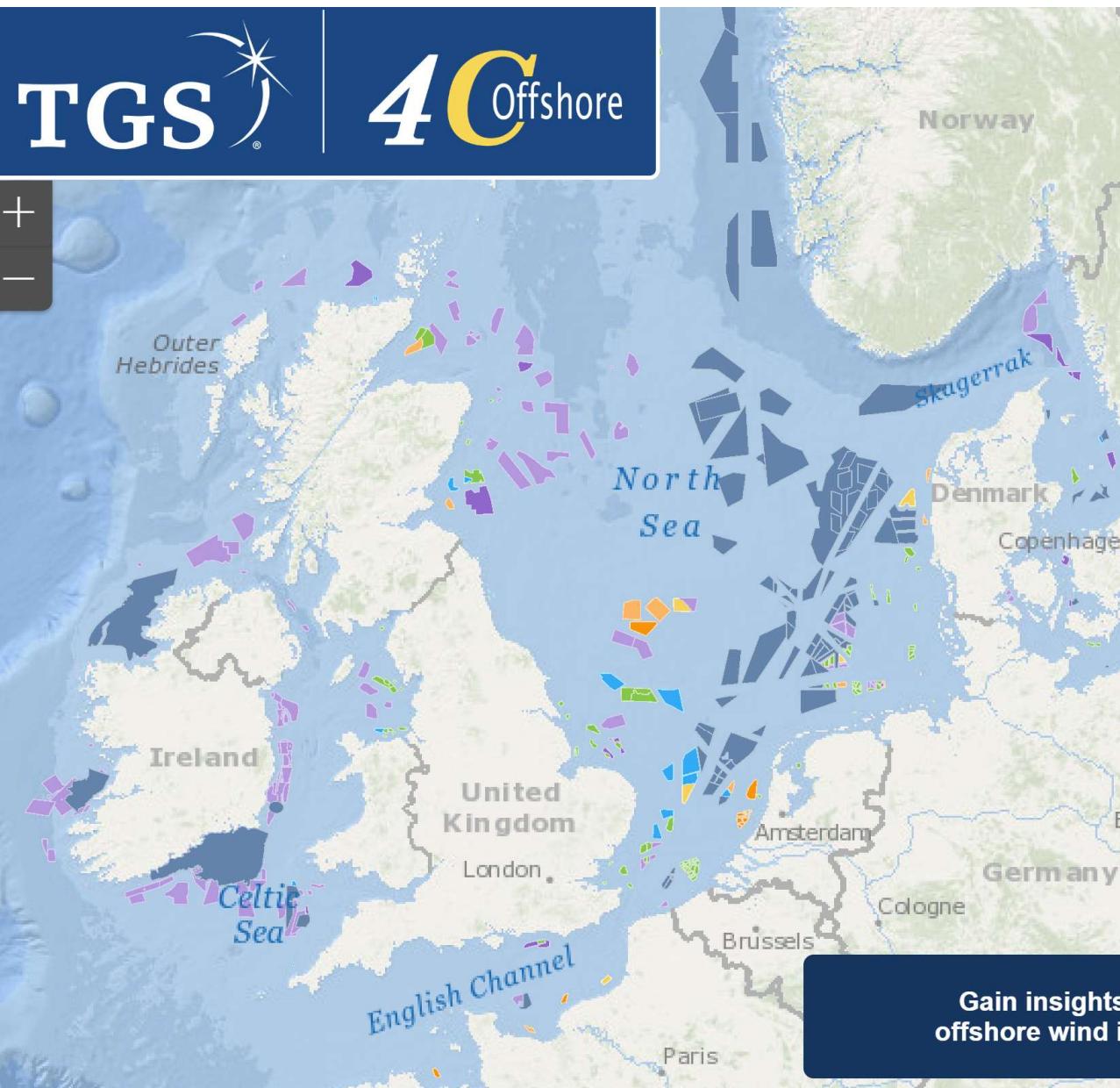
**edf**  
renewables



**SCOTTISHPOWER**

**everoze**

# OFFSHORE WIND – PATH TO 50GW – LEASING



# OFFSHORE WIND – CROWN ESTATE

## Playing our part in the growth of UK offshore wind

THE CROWN  
ESTATE

Our team of environmental and commercial experts, working in partnership with industry, stakeholders and Government, take an active, long-term approach to offshore wind development, helping unlock the extraordinary potential of the UK's seabed.

### Key enabling actions

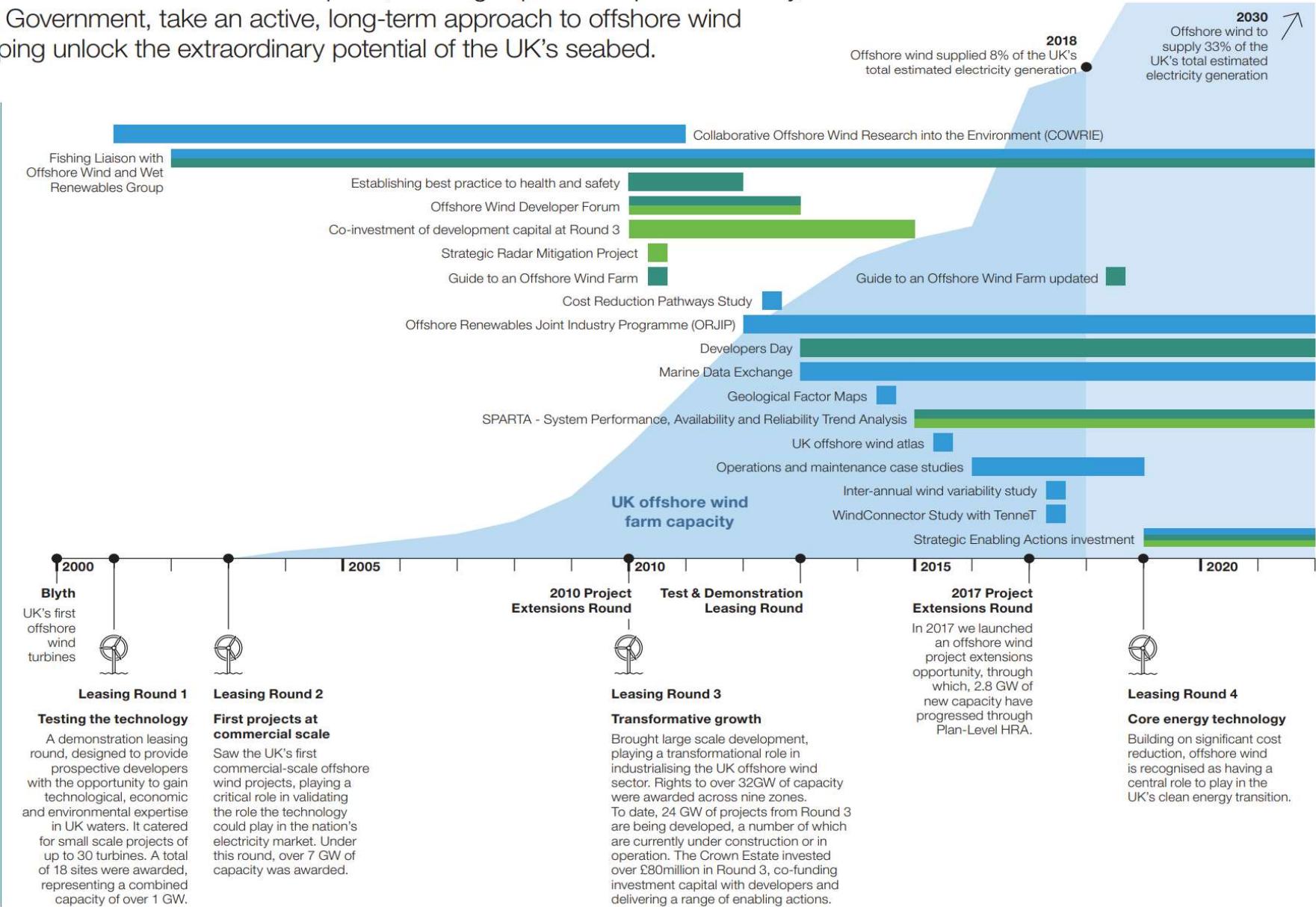
The chart on the right represents the timeline of our key enabling actions and the launch of leasing activities.

In addition to leasing seabed sites, we have undertaken a number of important enabling actions, together with the industry and stakeholders, to support the development and continued growth of the UK offshore wind sector.

These include:

-  **Growing the evidence base**
-  **Establishing best practice**
-  **Investing alongside developers**

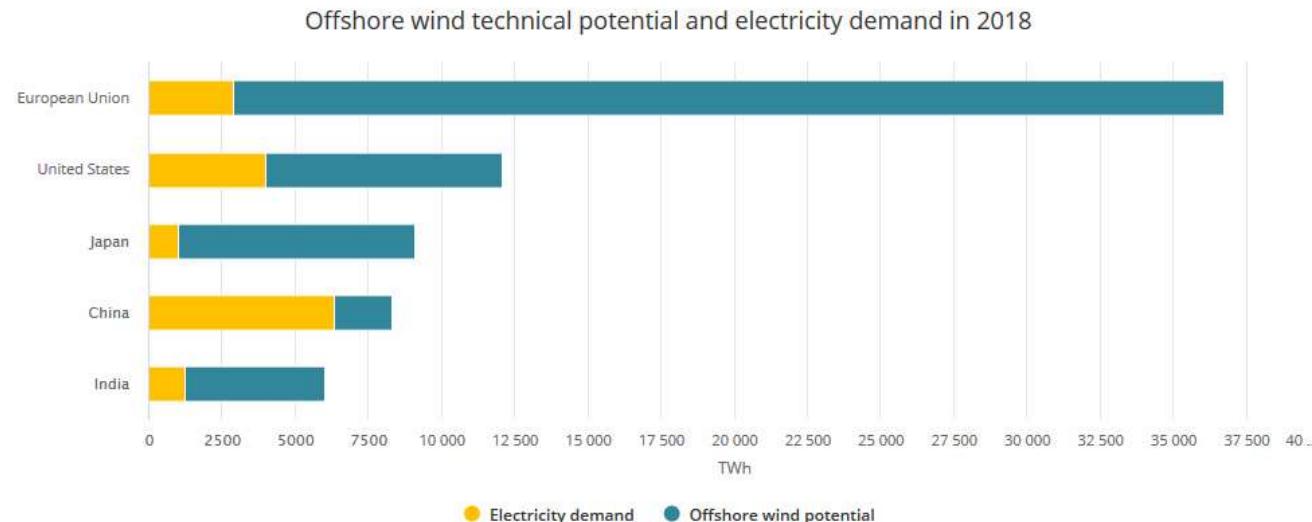
All of this has helped to bring down cost, de-risk developments and unlock value, making our nation's seabed a brilliant place to invest.



# GLOBAL OFFSHORE WIND POTENTIAL

## Offshore wind is gathering speed

Cost reductions and experience gained in Europe's North Sea are opening up a huge renewable resource. Offshore wind has the technical potential to meet today's electricity demand many times over. It is a variable source of generation, but offshore wind offers considerably higher capacity factors than solar PV and onshore wind thanks to ever-larger turbines that tap higher and more reliable wind speeds farther away from shore. There are further innovations on the horizon, including floating turbines that can open up new resources and markets.

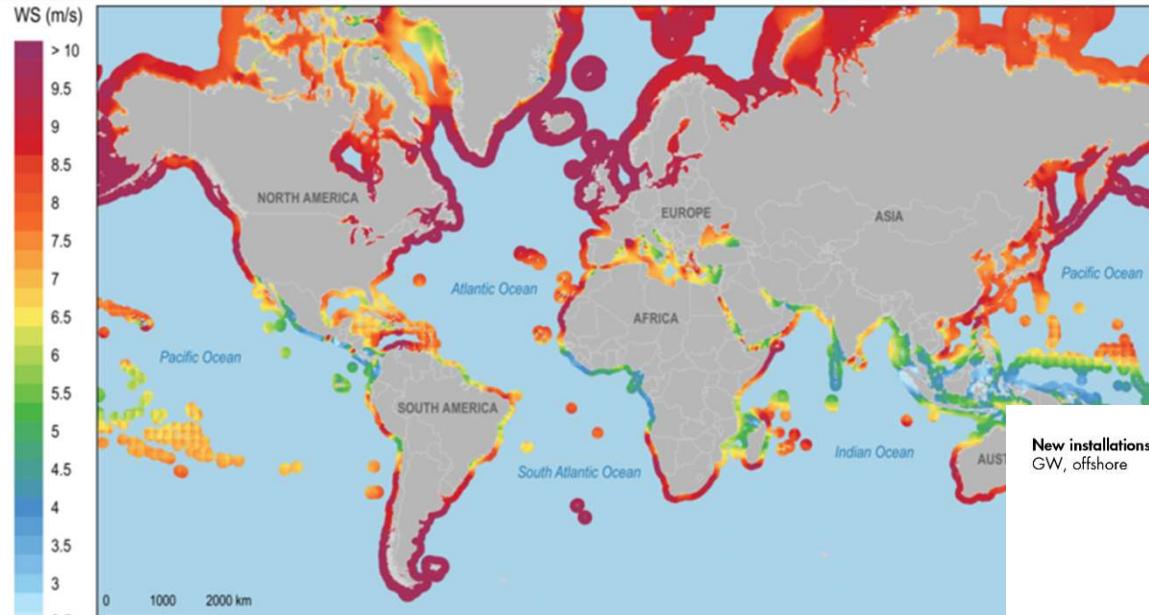


IEA. All rights reserved.

Increasingly cost-competitive offshore wind projects are on course to attract a trillion dollars of investment to 2040. Europe's success with the technology has sparked interest in China, the United States and elsewhere. In the Sustainable Development Scenario, offshore wind rivals its onshore counterpart as the leading source of electricity generation in the European Union, paving the way to full decarbonisation of Europe's power sector. Even higher deployment is possible if offshore wind becomes the foundation for the production of low-carbon hydrogen.

# GLOBAL OFFSHORE WIND POTENTIAL

## Global Offshore Wind Speeds



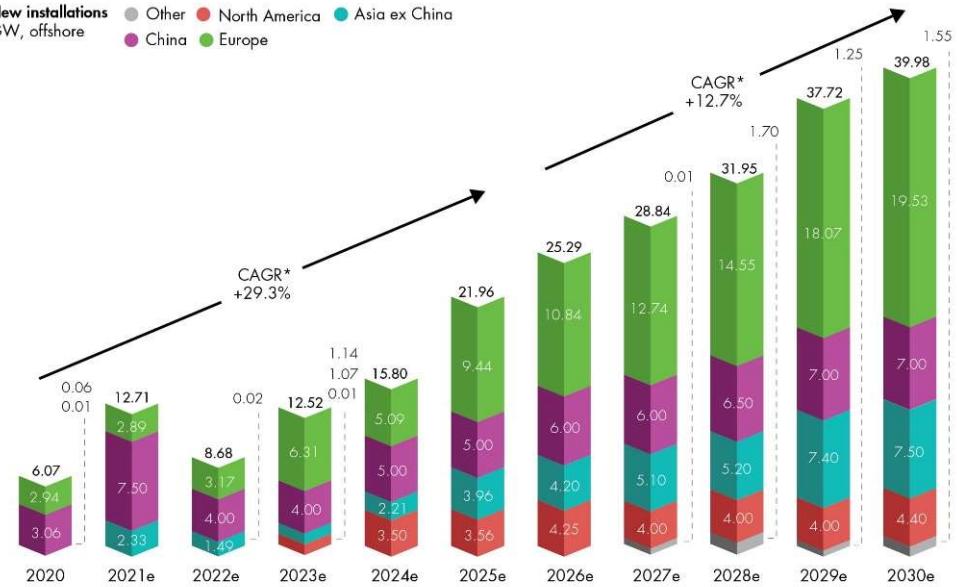
This wind resource map provides an estimate of mean annual wind speeds (m/s) extending 200 kilometers from shore at a hub height of 100 meters. It is provided under a World Bank Group (WBG) initiative on offshore wind energy sector management assistance program (ESMAP). For more information please visit: <https://esmap.org/offshore-wind>. The wind resource data is from the Global Wind Atlas (version 3.0), a free, web-based app 100 m resolution based on the latest input datasets and modeling methodologies. For more information please visit: <https://globalwindatlas.info>.



Published: May 2020  
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New installations  
GW, offshore  
● Other ● North America ● Asia ex China  
● China ● Europe



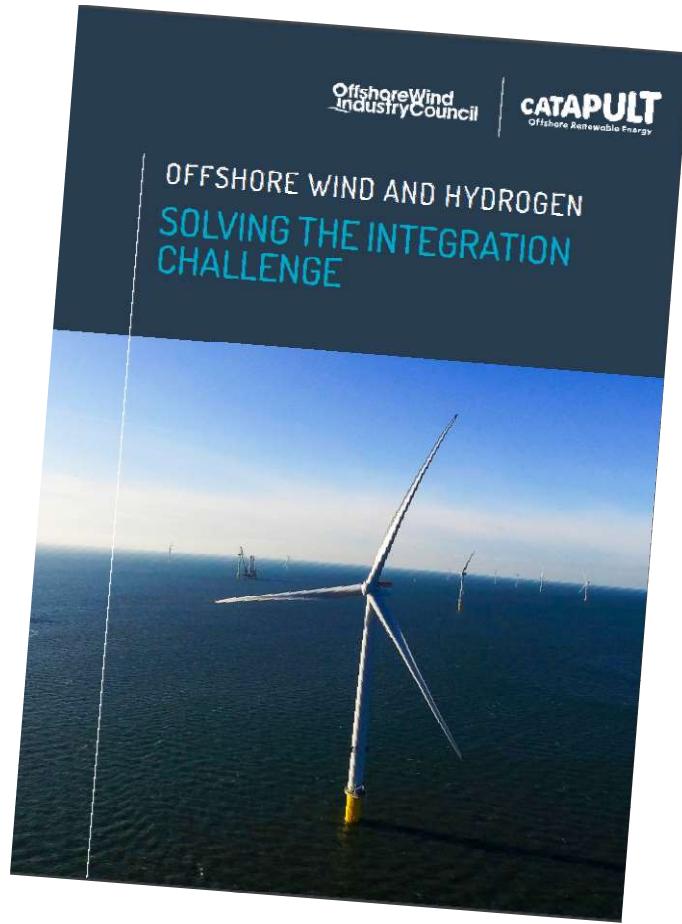
\*CAGR = Compound Annual Growth Rate  
Source: GWEC Market Intelligence, July 2021

# WIND POWER IN THE UK - FUTURE

## Floating Offshore Wind



## Green Hydrogen



# BREAKING RECORDS - 2015

Renewables overtake coal in UK power mix

## UK wind industry sets new generation record as it nears 25 per cent power share

As nuclear and gas power plants remain off line, wind industry celebrates its role in helping to address supply fears

By James Murray

More from this author

20 Oct 2014

5 Comments

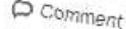
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LATEST STORIES ABOUT WIND



MIT: Wind farms do not make you sick

[Comment](#)



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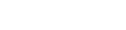
Comment



Comment



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Comment



Comment



Comment



Comment



Comment



# BREAKING RECORDS - 2016

BUSINESS GUIDE

## Borssele 1&2 World's Cheapest Offshore Wind Farm



Image: Tennet

government following the annual

The cost of building and operating the 700MW Borssele 1 and 2 offshore wind farm is expected to be EUR 2.7 billion cheaper than previously estimated. Moreover, the wind farm will generate 22.5% more electricity than anticipated.

Fierce competition between companies in the public tender to secure the permit and associated subsidy to build and operate the wind farm resulted in achieving the lower than anticipated price, thus making the project cheapest worldwide, according to a statement by the

COMP

## Record 46% of UK's electricity generated by clean energy sources in 2015

Official figures show low-carbon sources accounted for almost half of national electricity supply last year - outstripping coal for the first time



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**Bloomberg** Markets Tech Pursuits Politics Opinion Businessweek

## Record Green Power Installations Beat Fossil Fuel for First Time

# MORE GOOD NEWS - 2017

UK renewables displaces coal for 2nd time in 2017

10/06/2017  
By Diarmuid Williams  
International Digital Editor

On 21<sup>st</sup> April this year, the UK saw the first day of no coal-fired power generation since the industrial revolution, as coal was displaced by renewable energy generation, in particular 1.7 GW of solar output. This notable occasion was repeated on Sunday 1<sup>st</sup> October, as the country again went coal-free.

WIND MARKETS & POLICY

## New Study Finds Offshore Wind May Be Haven for Sea Life

But more research is needed to understand the long-term impacts.

JASON DEIGN | OCTOBER 23, 2017



Alpha Ventus offshore wind farm under construction in the North Sea in 2009.

Photo Credit: DOTI/Matthias Ibelser



The screenshot shows the CarbonBrief website's homepage with a dark background. At the top, there are navigation links for SCIENCE, ENERGY, POLICY, IN FOCUS, and DAILY BRIEFING. On the right, there are buttons for SUBSCRIBE and a search icon. The main headline reads "Analysis: UK auction reveals offshore wind cheaper than new gas". Below the headline, there is a photograph of an offshore wind farm under construction with a large blue vessel in the water. A caption below the photo states: "Offshore wind farm under construction in the Irish Sea, Dudden Sands, Cumbria, UK, 2014. Credit: Chris James/Alamy Stock Photo". The article summary continues: "The UK government today awarded contracts worth £176m to 11 low-carbon electricity schemes, with offshore". The author's name, SIMON EVANS, and the date, 11.09.2017 | 5:12pm, are visible at the bottom left of the article area. There are also social media sharing icons for Facebook, Twitter, and LinkedIn.



The UK government today awarded contracts worth £176m to 11 low-carbon electricity schemes, with offshore

# OFFSHORE EXPANSION - 2018

**Renewables Now** | News | Research | Trends | Events | Advertising | Wind

## Triple good news for US offshore wind sector

October 18 (Renewables Now) - The Trump Administration made three announcements on Wednesday that bring positive signals to the US offshore wind industry, both on the East and West Coasts.

First, US Secretary of the Interior Ryan Zinke unveiled that the Bureau of Ocean Energy Management (BOEM) will hold an auction for nearly 390,000 acres (157,800 hectares) offshore Massachusetts on December 13, 2018. According to the Secretary, the particular area can accommodate about 4.1 GW of capacity if fully developed. A total of 19 companies have qualified to take part in the process. Details will be published ~ October 19, 2018.

Published Oct 18, 2018 18:01 CEST | Author Ivan Skurikov | Share this story | Tags: Business, Capacity, USA, Electricity Generation, Energy/Utilities, Renewable Energy, Offshore Wind



## FRENCH OFFSHORE WIND: LET THE GRAND REBOOT BEGIN!

Published November 2016

Rewind only two years and offshore wind in France looked quite rosy. A pipeline of 6 projects totalling 3 GW awarded in the space of two years, two French-owned turbine OEMs and significant supply chain commitments. Two years on, permits have been appealed, national turbine OEMs have changed hands, the 2016 energy sector plan has brought vague targets, and the third offshore tender round is ever-postponed, and looks very meagre.

French Energy and Environment Minister Ségolène Royal appears set to formally kick-off the third tender round with a site off Dunkirk and another off Oleron in the upcoming weeks. A shift in approach – a “grand reboot” – is on the way. And it's coming not a moment too soon!

### The cost reboot:

Offshore wind in France has been tipped as too expensive with a 20-year FIT for round #1 projects north of 170 € / MWh, excluding grid connection. Policy-makers are now benchmarking this with projects to be constructed in approximately the same period with FITs at or below 70 € / MWh. A crying gap!

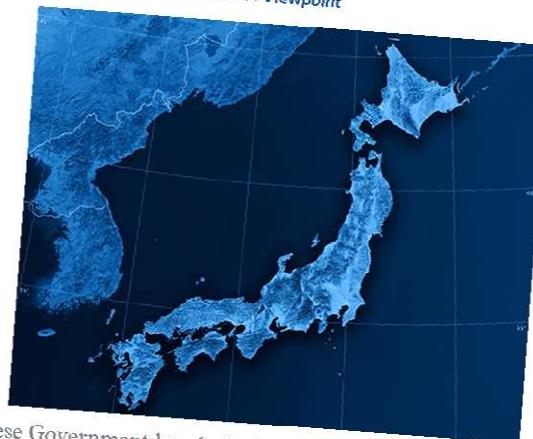
Photo: © Everoze

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News & insights > Is the sun finally rising...

## Is the sun finally rising on the Japanese offshore wind market?

Posted by Jan Matthiesen | 27 March 2018 | Viewpoint



The Japanese Government has drafted a new bill which will set nationwide rules for offshore wind developments in national waters, which could be a much-needed boost for the offshore wind industry.



# ACCELERATION - 2019



The image shows a screenshot of a BBC News article. At the top, there's a red navigation bar with links for "Sign in", "News", "Sport", "Weather", "iPlayer", and "Sounds". Below this is the BBC News logo and a "NEWS" banner. The main headline reads "Climate change: Offshore wind expands at record low price". It's by Roger Harrabin, BBC environment analyst, and was published on 20 September 2019. There are social sharing icons for Facebook, Twitter, and Email, along with a "Share" button. A large photograph of an offshore wind farm is visible, showing many turbines in the water under a cloudy sky. The photo credit "GETTY IMAGES" is at the bottom right. Below the photo, there's a quote: "A record amount of new offshore wind power has been announced in the UK. The new projects will power more than seven million homes at a lower-than-expected cost. The government says the wind farms represent a breakthrough, typically generating electricity without subsidy."

## Renewable electricity overtakes fossil fuels in UK for first time

New offshore windfarms opening in third quarter mark milestone towards zero carbon



▲ Ten years ago fossil fuels made four fifths of the UK's electricity supply. Photograph: Islandstock/Alamy

Renewable energy sources provided more electricity to UK homes and businesses than fossil fuels for the first time over the last quarter, according to new research.

The renewables record was set in the third quarter of this year after its share of the electricity mix rose to 40%.

# ACCELERATION – 2021

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Finance

## **Cost of Capital Spikes for Fossil-Fuel Producers**

Ten years ago, developing oil and gas projects was about the same as renewable endeavors. Not anymore.

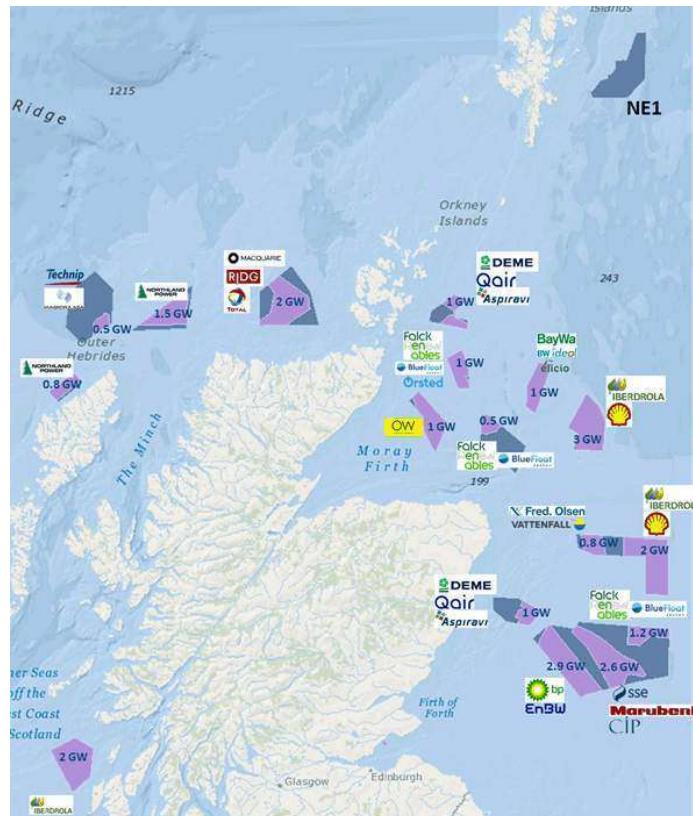
By [Tim Quinson](#) +Get Alerts  
9 November 2021, 09:53 GMT

Press release | 26 October 2021 | Brussels

**State of the Energy Union 2021: Renewables overtake fossil fuels as the EU's main power source**



# SYSTEM INTEGRATION – 2022



**ScotWind**

**25 GW !!**

**£700m option fees**

(half of projects considering  
green hydrogen)

Lead applicant	Option Fees	Technology	Total capacity (MW)
BP Alternative Energy Investments	£85,900,000	Fixed	2,907
SSE Renewables	£85,900,000	Floating	2,610
Falck Renewables	£28,000,000	Floating	1,200
Shell New Energies	£86,000,000	Floating	2,000
Vattenfall	£20,000,000	Floating	798
DEME	£18,700,000	Fixed	1,008
DEME	£20,000,000	Floating	1,008
Falck Renewables	£25,600,000	Floating	1,000
Ocean Winds	£42,900,000	Fixed	1,000
Falck Renewables	£13,400,000	Floating	500
Scottish Power Renewables	£68,400,000	Floating	3,000
BayWa	£33,000,000	Floating	960
Offshore Wind Power	£65,700,000	Fixed	2,000
Northland Power	£3,900,000	Floating	1,500
Magnora	£10,300,000	Mixed	495
Northland Power	£16,100,000	Fixed	840
Scottish Power Renewables	£75,400,000	Fixed	2,000
	£699,200,000		24,826



**Hollandse Kust West**

**760 MW offshore wind**

**with..**

**600 MW electrolyser**

**Floating Solar**



# DECELERATION – 2023

---

## Wind is main source of UK electricity for first time

⌚ 11 May · 🗣 Comments

## No bids for offshore wind in government auction

⌚ 8 September · 🗣 Comments

## Vattenfall halts project, warns UK offshore wind targets in doubt

By Susanna Twidale

July 20, 2023 1:54 PM GMT+1 · Updated 4 months ago

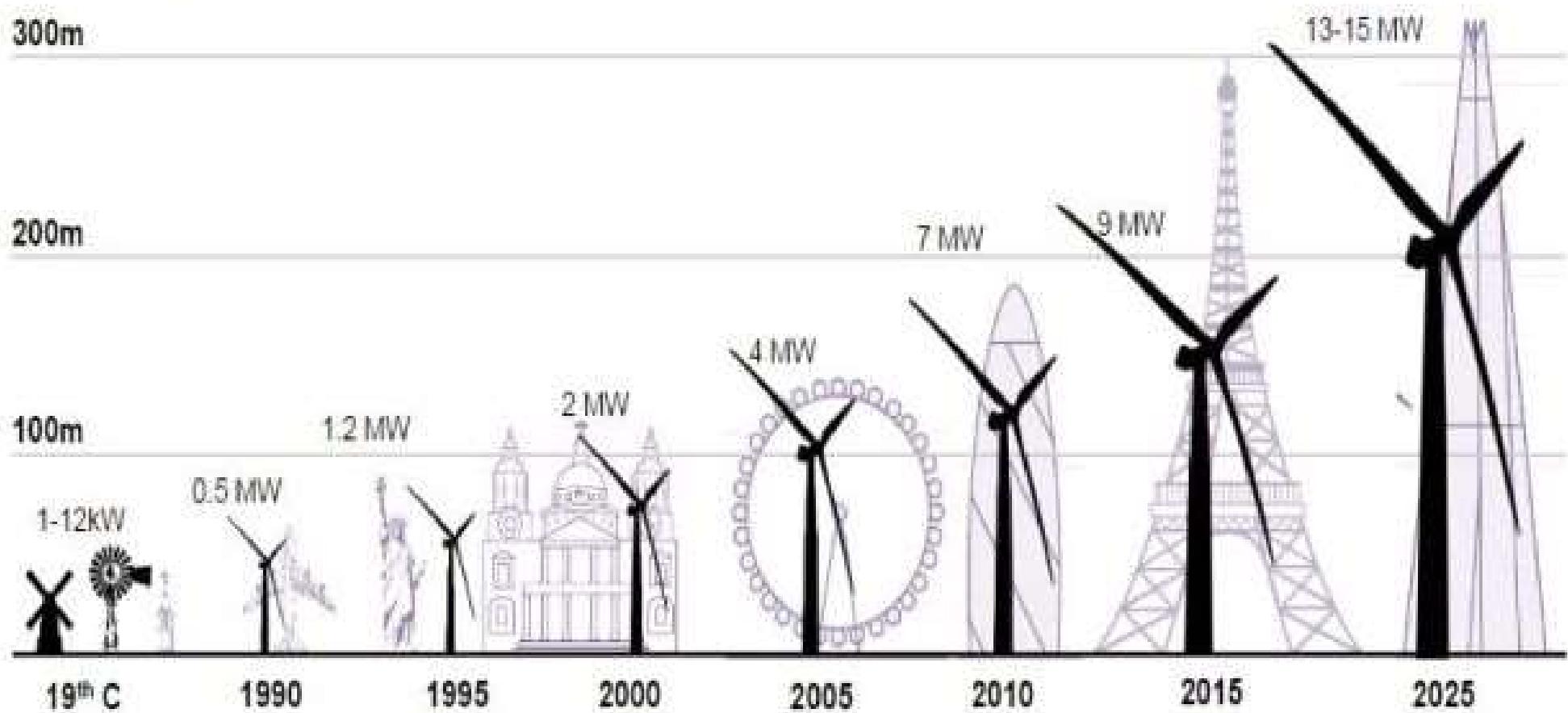


# TURBINE TRENDS



# TURBINE TRENDS

## Evolution of wind turbine heights and output



Sources: Various; Bloomberg New Energy Finance

# BIGGEST TURBINES - 2018

1. MHI Vestas VI64-8.3MW (Burbo bank/Blyth/Aberdeen)
2. Enercon EI26 7.5MW (onshore)
3. Samsung S7.0 I7I 7MW (sold to ORE Catapult)
4. MHI SeaAngel 7MW (mothballed)
5. Senvion 6M Series (10MW announced)
6. Siemens SWT-7.0 I54 (Hull)
7. Alstom Haliade I50-6MW (bought by GE)
8. Sinovel SL6000
9. Areva M5000
10. Gamesa G5MW



Source <http://www.windpowermonthly.com/10-biggest-turbines>

# TURBINE TRENDS

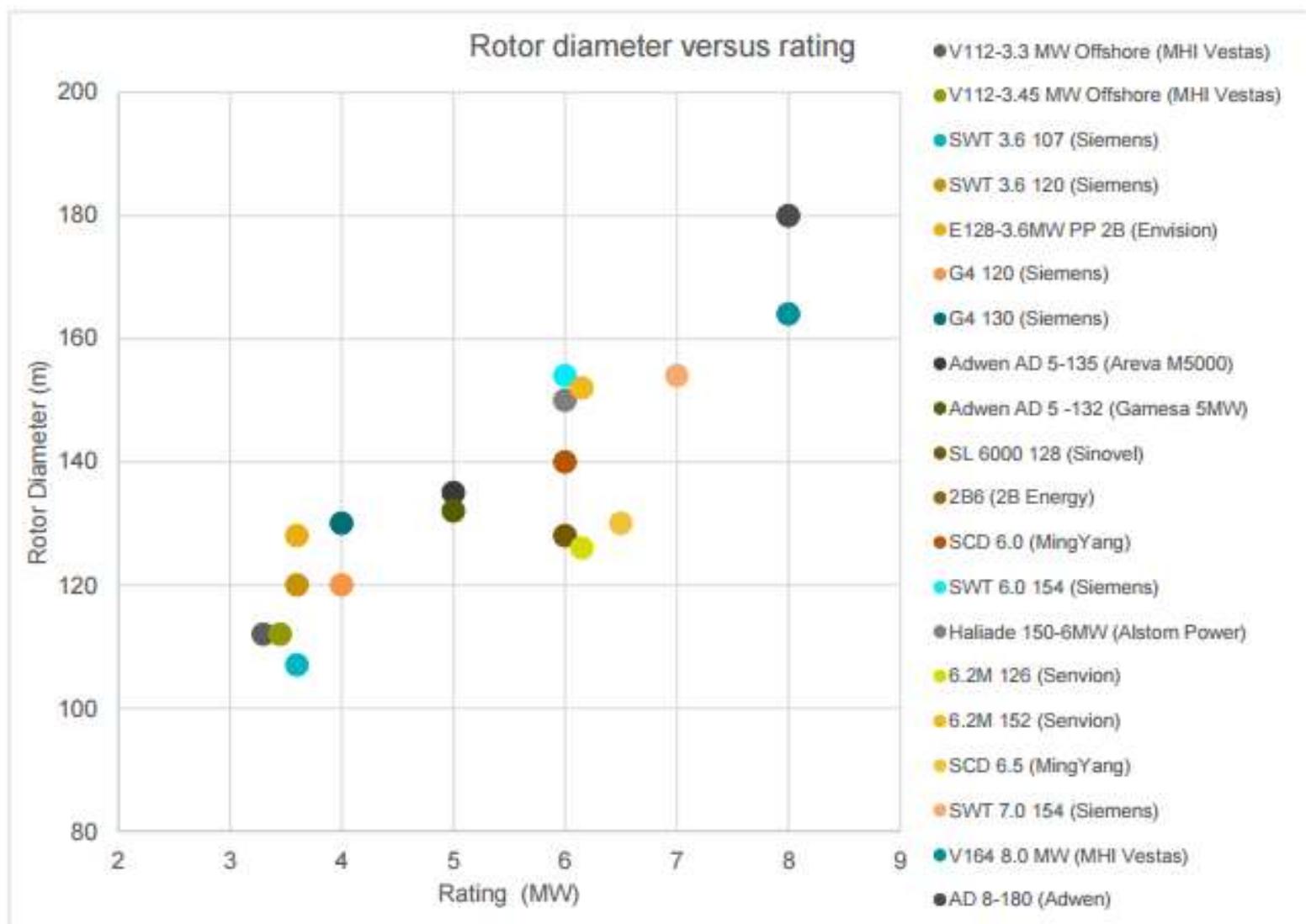
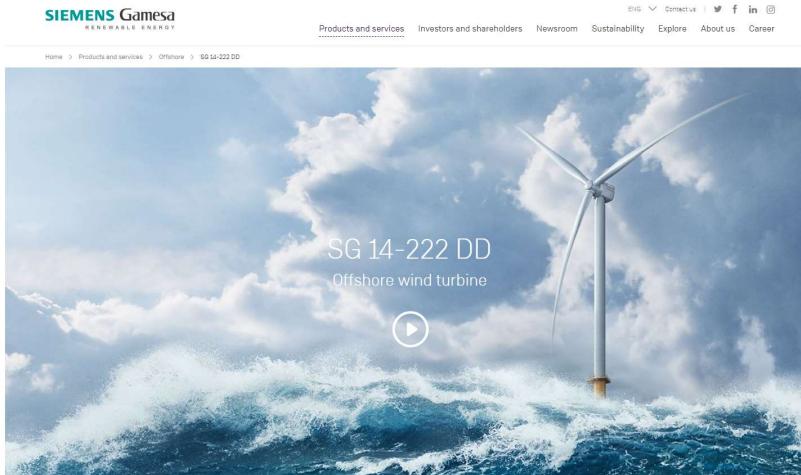


Figure 3 - Rotor diameter versus rating

<https://ore.catapult.org.uk/wp-content/uploads/2016/05/Cost-Reduction-Monitoring-Framework-2015-Qualitative-report.pdf>



# OFFSHORE TURBINE TRENDS - 10MW+



Siemens Gamesa  
SG14-222 – 14MW



Mitsubishi Vestas  
V164 10MW



General Electric  
Haliade X – 12MW



# OFFSHORE SCALE

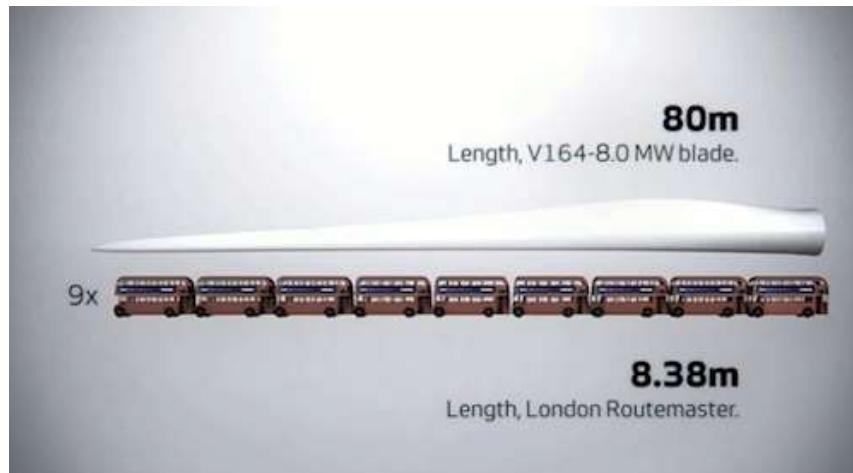


© Siemens AG



# LONGEST BLADES

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# LONGEST BLADES

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Adwen/LM 88m



LZ Blades 123m

# BLADE TESTING

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# CONSTRUCTION

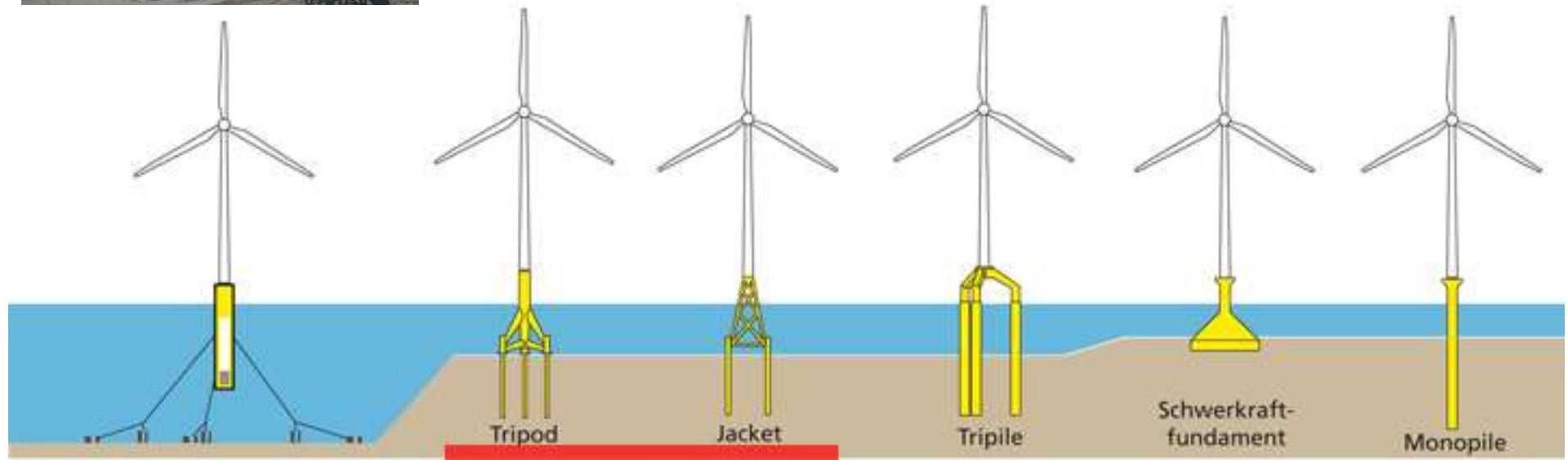


# ONSHORE CONSTRUCTION

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# OFFSHORE CONSTRUCTION





An aerial photograph of an offshore oil or gas platform situated in the middle of the ocean. The platform is primarily red and white, with a large red superstructure and white cylindrical storage tanks. A prominent feature is a large, vertical, yellow cylindrical object, possibly a riser or a decompression tower, which extends from the deck down into the water. In the foreground, a small boat with several people is positioned near the yellow cylinder. The background consists of the vast, blue ocean.

**WEIGHT LIMITS?**



VERTICALITY?



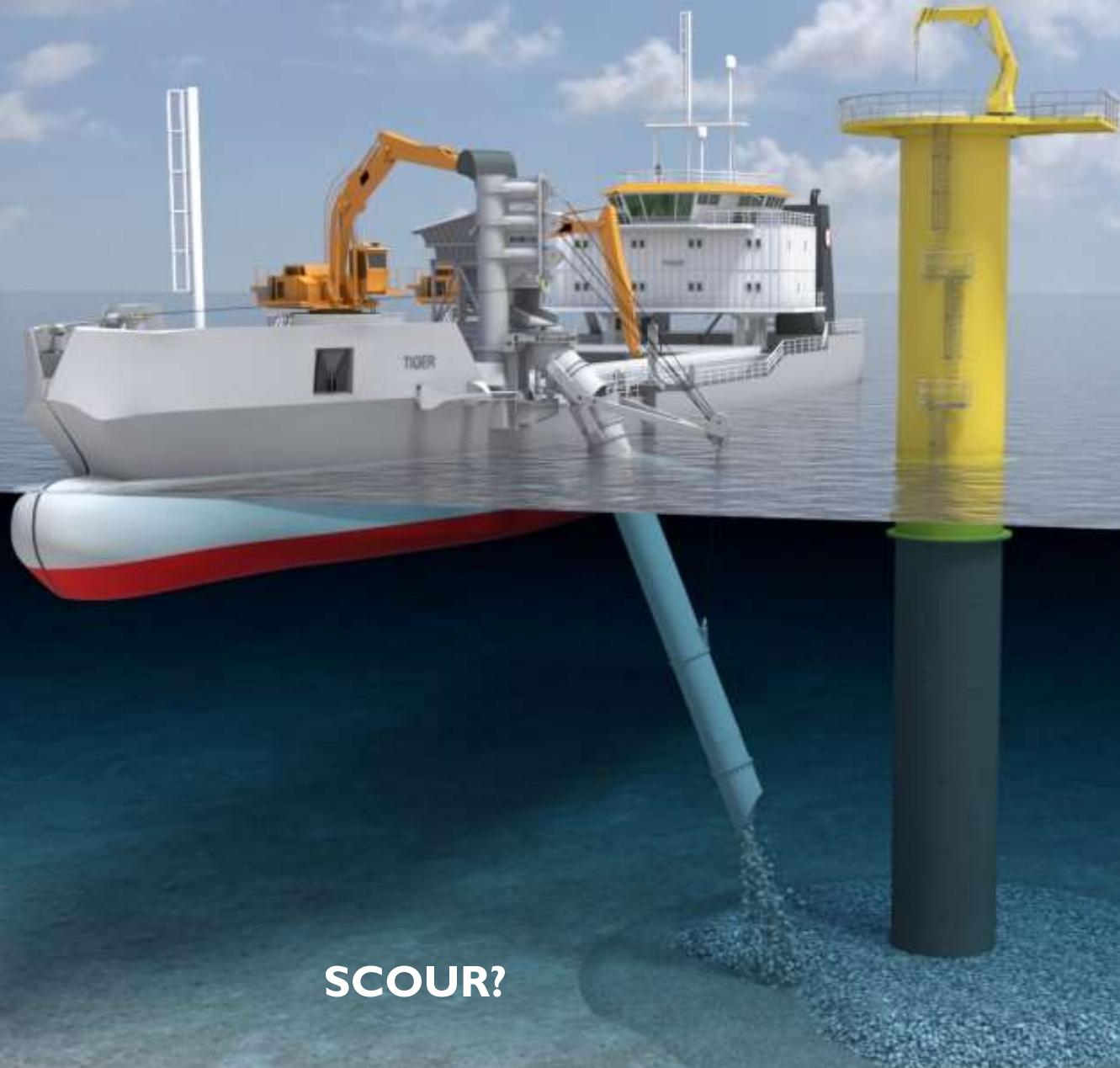
CORROSION?

**FABRICATION COMPLEXITY?**





**INSTALLATION VESSEL COST?**



**SCOUR?**

**DURATION?**

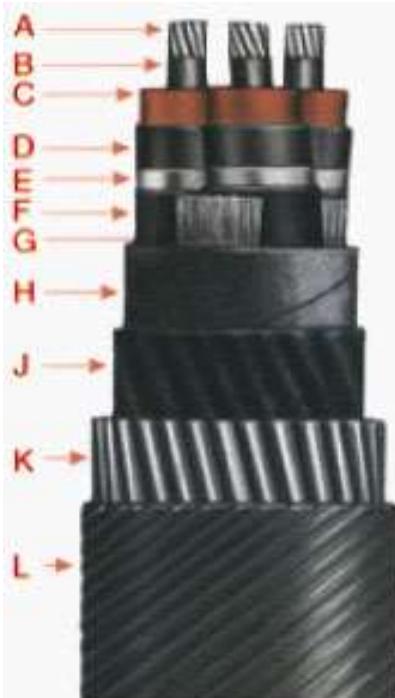




An aerial photograph of an offshore wind farm. In the center, a large white monopile foundation supports a nacelle with three blades. Two smaller towers stand nearby. The water is a deep blue-green color.

**WEATHER?**

# CABLES



- A: Conductor-Copper
- B: Strand Screen-Extruded  
Semi-conducting EPR
- C: Insulation-Okoguard
- D: Insulation Screen-  
Extruded Semiconducting  
EPR
- E: Shield-Copper Tape
- F: Fillers-Polypropylene
- G: Binder Tape
- H: Jacket-Okolene
- J: Bedding-Polypropylene
- K: Armor-Galvanized Steel  
Wires
- L: Covering-Nylon Serving  
Slushed with Tar





A photograph of a large, rectangular industrial component, possibly a transformer or a piece of HVAC equipment, being transported on a ship. The structure is supported by a red lattice-boom crane mounted on a yellow cylindrical support. The ship's hull is visible at the bottom, and the background is a dark, hazy sky.

**HVAC / HVDC ?**

# TRAINING

---



# CREW TRANSFER

---



# CONSENTING



# CONSENTING

---



# ENVIRONMENTAL IMPACT ASSESSMENT

## Environmental Statement Chapters:

- Noise
- Landscape and Visual Assessment
- Ecology
- Archaeology and Cultural Heritage
- Traffic and Transport
- Socio-Economics
- Hydrology and Hydrogeology
- Shadow Flicker
- Infrastructure
- Telecommunication
- Television
- Aviation
- Public Safety



# ONSHORE CHALLENGES

## RECHARGE

News   Insight   Wind   Solar   Thought Leaders   Brazil   4040   News

all   in depth   analysis   opinion   europe + africa   americas   asia + australia   offshore   tech

### Pickles extends grip on UK wind



Eric Pickles

By Andrew Lee in London Thursday, April 10 2014 Updated: Thursday, April 10 2014

The onshore wind industry has again cried foul after the UK's government announced it would keep a tight grip on planning decisions for another year.

SHARE STORY

[Tweet](#) [Share](#)

# Fracking vs onshore wind: the system isn't fair.

November 16, 2017

Head to a proposed wind turbine site, and all is still and empty. Nobody has been given permission to build wind turbines in England since 2015. Meanwhile in Lancashire, fracking company Cuadrilla are sharpening their drills - even though the local council and community has said no.

Public support for wind turbines has just reached an all-time high at 74%, while support for fracking - now at 13% - is at an all-time low. But the government's totally out of step.. They've rigged the system in favour of fracking and against onshore wind. This means communities who want onshore wind cannot have it, while communities who don't want fracking

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## UK wind operators hit at plans to end subsidies early

Thousands of jobs at risk and investment scrapped, industry warns



A wind farm forms the backdrop to a coastal town.

### New onshore wind planning hurdles concern developers

Industry says local councils having say over wind farm developments but not other energy sources creates uneven playing field

By Will Nichols | 19 Jun 2015 | 0 Comments

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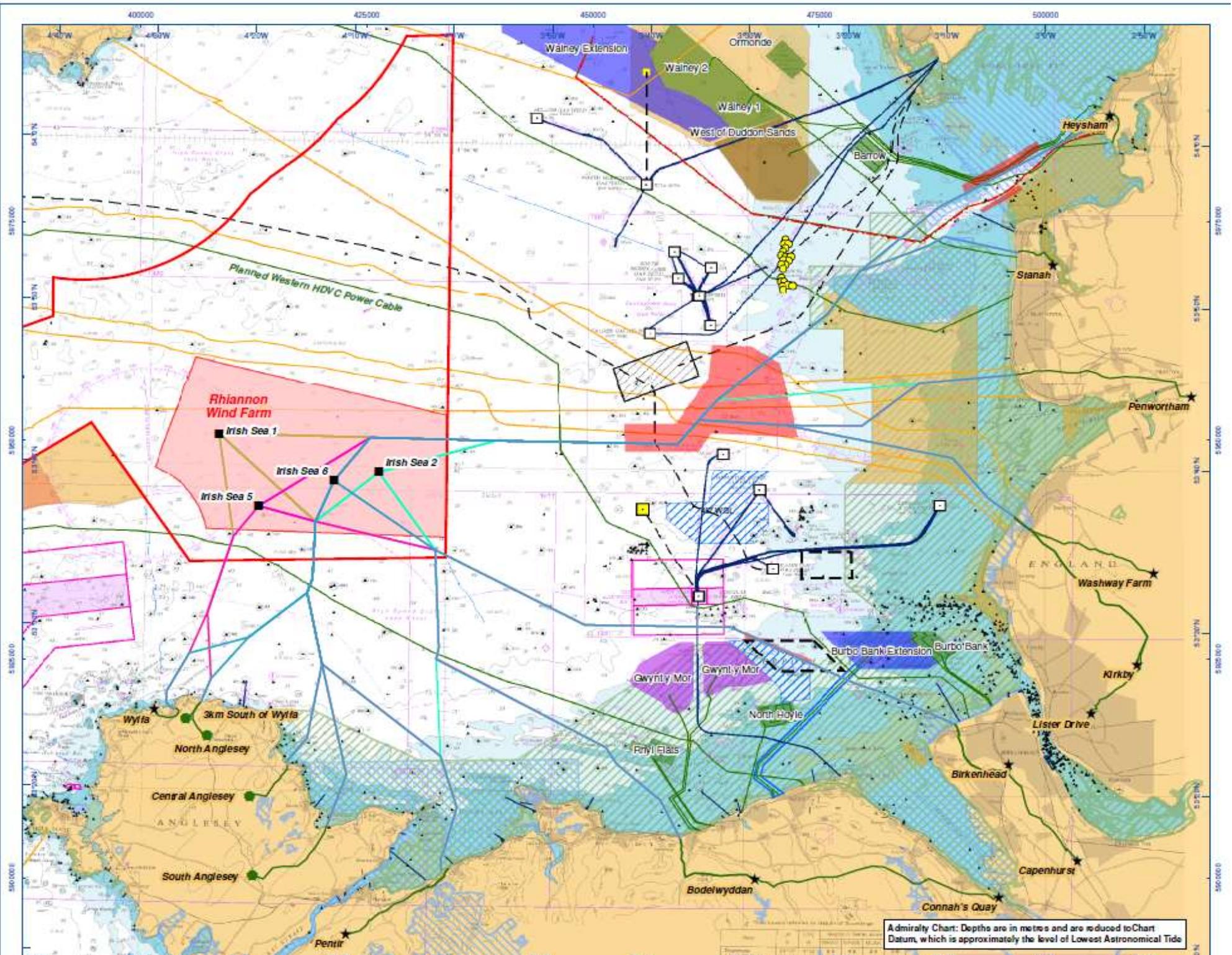


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# OFFSHORE DEVELOPMENT

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# OFFSHORE IMPACT ASSESSMENT

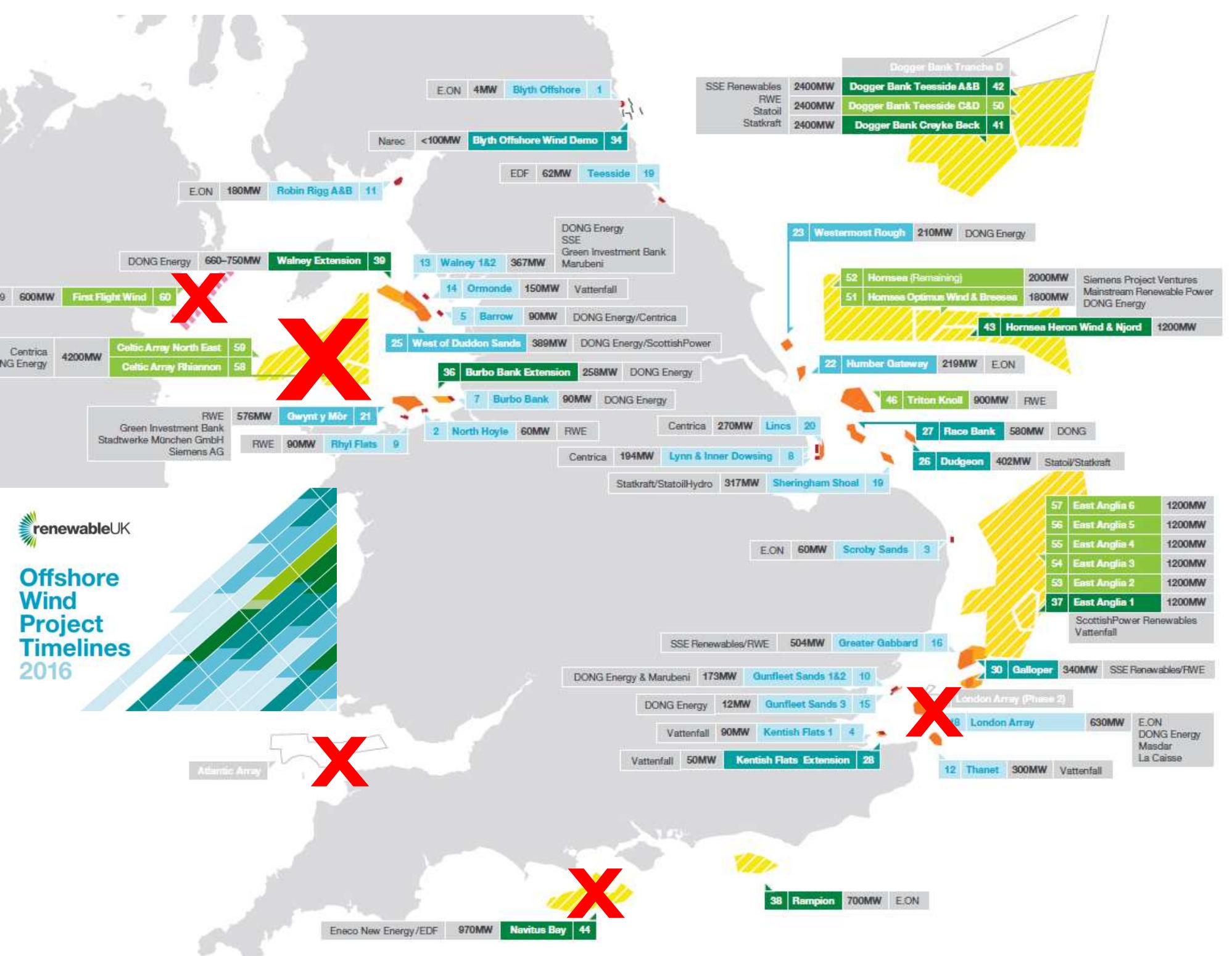
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## Onshore:

- Noise
- Landscape and Visual Assessment
- Ecology
- Archaeology and Cultural Heritage
- Traffic and Transport
- Socio-Economics
- Hydrology and Hydrogeology
- Shadow Flicker
- Infrastructure
- Telecommunication
- Television
- Aviation
- Public Safety

## Offshore Environmental Statement Chapters:

- Coastal Processes
- Sediment and Water Quality
- Marine Ecology
- Nature Conservation
- Marine Mammals
- Fish Resources
- Shipping and Navigation
- Other Marine Users
- Commercial Fisheries
- Sub-Sea Noise and Electromagnetic Fields



# ENVIRONMENTAL

# MACRO SCALE

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# MACRO SCALE

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**RECHARGE WIND**

Orsted's Hornsea 1 in the UK. Photo: Orsted

**Orsted shares plunge on offshore wind production warning**

Danish giant warns of job cuts as it says production modelling may underestimate negatives from blockage and wake effects

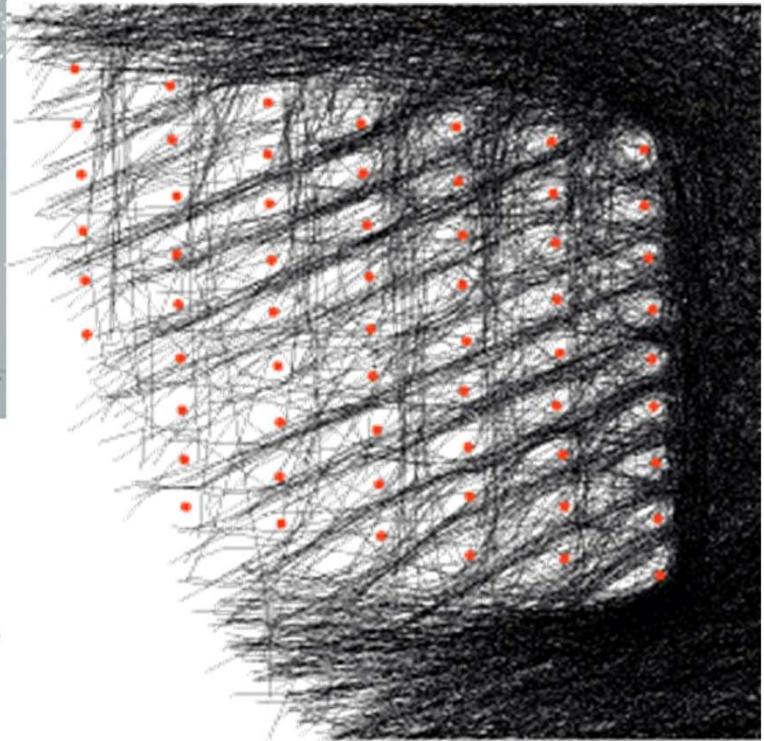
# MACRO SCALE

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# ECOLOGY

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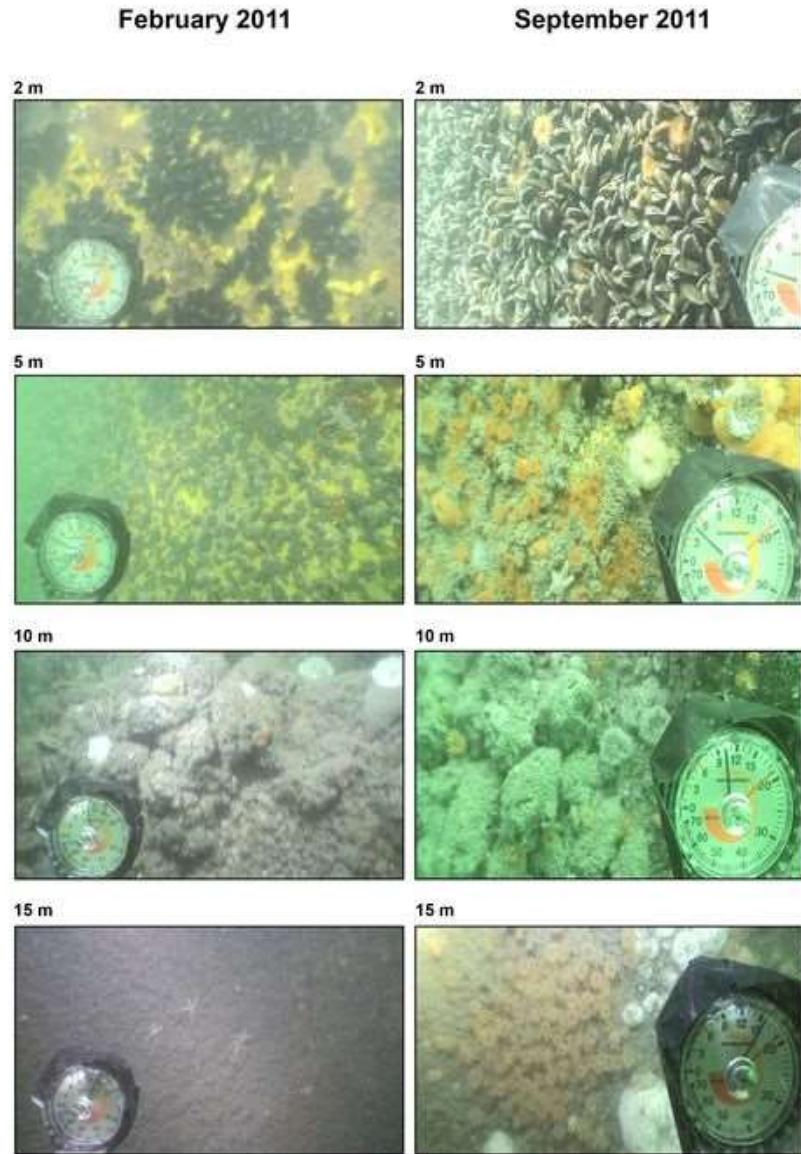
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# MARINE MAMMALS

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# THE REEF EFFECT



Rigs-to-Reefs  
Courtesy of Greg Boland

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## ② TUTORIAL

- Blyth Offshore Demonstrator
- Innovation for Cost Reduction
- Competitive Auction

# TUTORIAL

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Department for  
Energy Security  
& Net Zero

## ---- Press Release ---

To support innovation in the floating offshore wind sector, the Crown Estate and the Department for Energy Security & Net Zero (DESNZ) have today announced several new offshore wind zones, to be auctioned to eligible developers via a special CfD allocation round auction, to be held **tomorrow** in Electrical Engineering Room 116.

Developers are invited to submit bids to the auction but must include 2 (or more) innovative technologies in their floating offshore windfarm which will help the developer, and the wider industry, to **accelerate the deployment** of floating offshore wind, reduce the **environmental impact** or promote **system integration**. Developers must:

- Research the anticipated **levelized cost** of floating offshore wind in preparation for the auction
- Identify **two promising innovations** to demonstrate (for the first time) in your windfarm

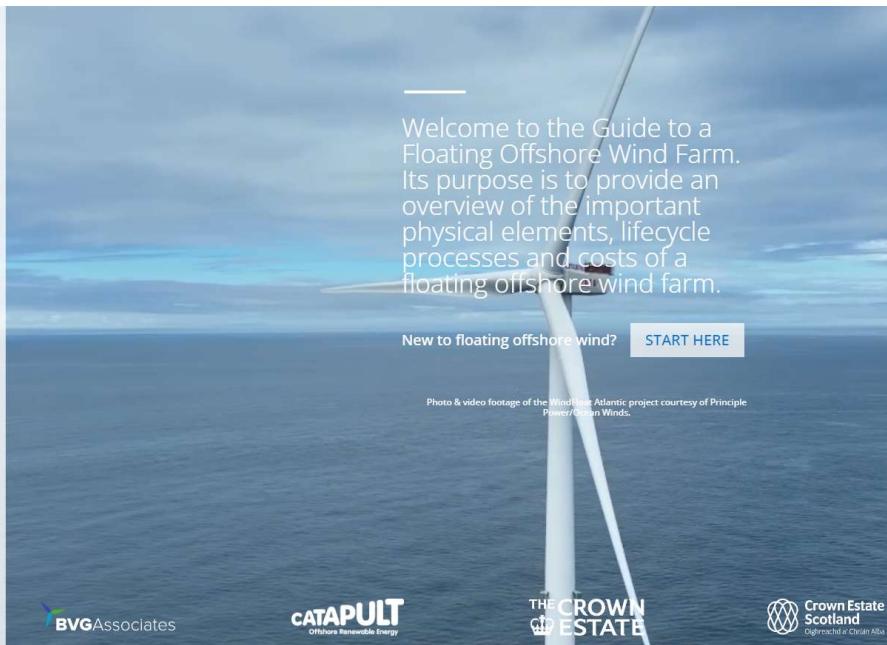
Details of **auction 'pot size'** to be announced tomorrow

# TUTORIAL RESOURCES

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## Some Innovation Inspiration:

- Offshore Wind Innovation Hub: <http://offshorewindinnovationhub.com/>
- Guide to a Floating Offshore Wind Farm: <https://guidetofloatingoffshorewind.com>
- IRENA – Innovation Outlook Offshore Wind: <http://www.irena.org/publications/2016/Oct/Innovation-Outlook-Offshore-Wind>
- Google!



The cover page of the "Guide to a Floating Offshore Wind Farm". The left sidebar contains a table of contents with links to lifecycle overview, floating technology, fixed versus floating, technical detail, wind farm costs, procurement structures, supply chain, UK market, UK content, glossary, more information, contact, about this guide, and a download link for a PDF version. The main content area shows a large image of a floating offshore wind farm tower in the ocean under a cloudy sky. A central text block reads: "Welcome to the Guide to a Floating Offshore Wind Farm. Its purpose is to provide an overview of the important physical elements, lifecycle processes and costs of a floating offshore wind farm." Below this is a "START HERE" button. At the bottom, there are logos for BVG Associates, CATAPULT Offshore Renewable Energy, THE CROWN ESTATE, and Crown Estate Scotland. A small note at the bottom states: "Photo & video footage of the WindFloat Atlantic project courtesy of Principle Power/Ocean Winds."



Thanks for listening

Talk to us

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