Industry for the wind energy

wind energy

BASQUE COUNTRY

Basque Country – Industry & Technology & (of course) Wind Energy

Most industrialised region in Spain

Highest R&D investment

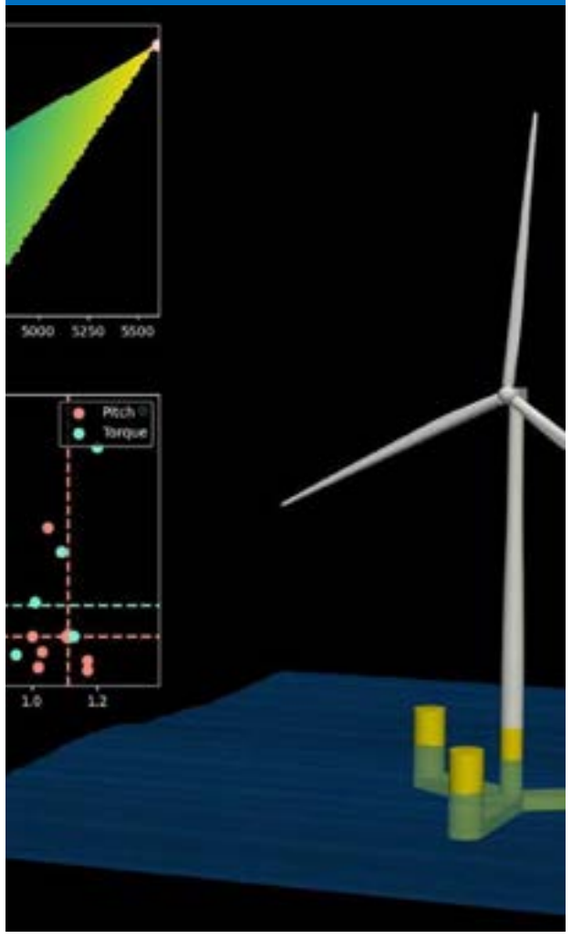
150 companies working on wind energy

Wind Energy Basque Country – We have the…

Companies

Experience

Technology

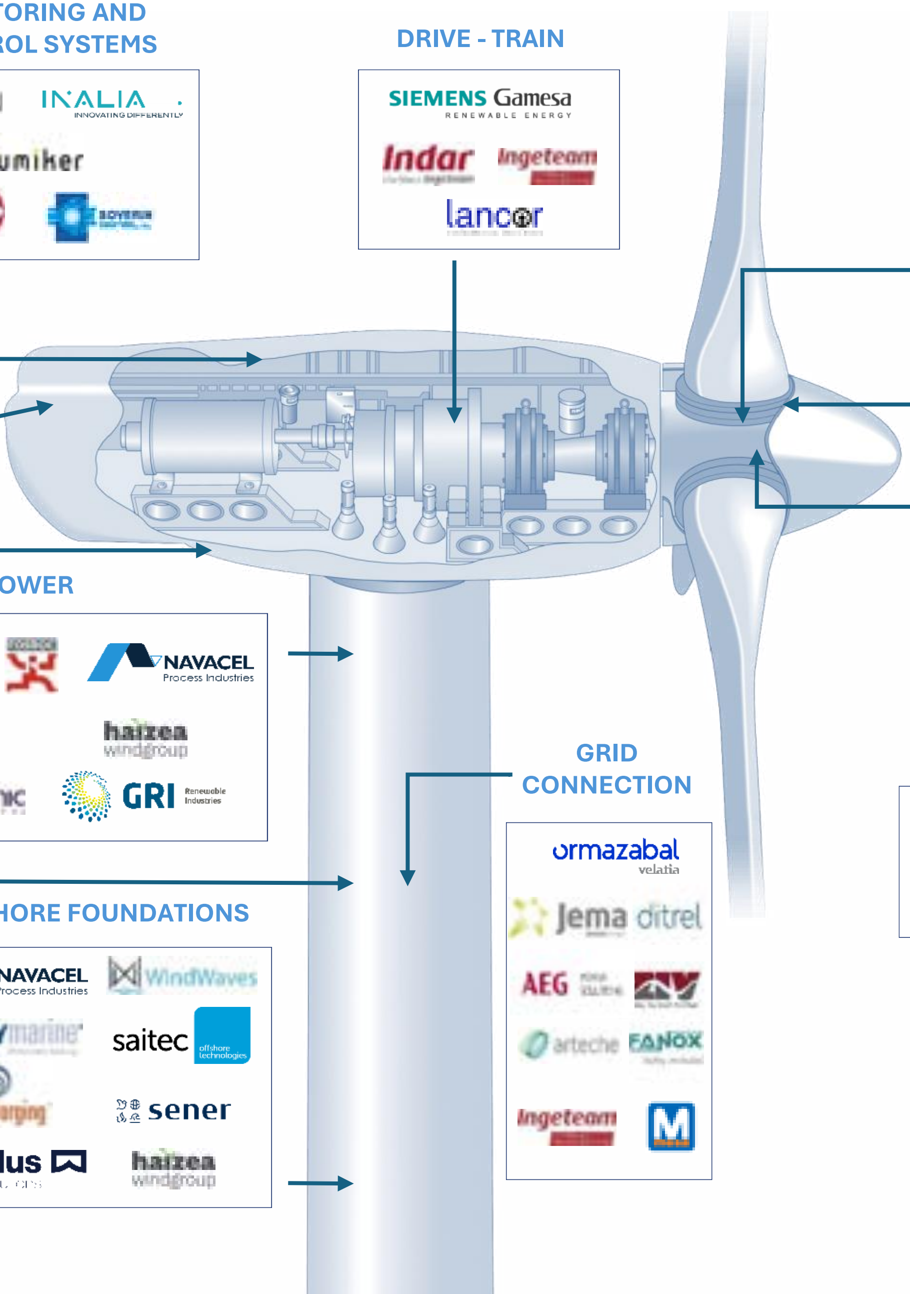


wind energy BASQUE COUNTRY

The Basque Country has competitive companies in all segments of the wind energy value chain

wind energy BASQUE COUNTRY

The Basque Country is also home to manufacturers of all key components of a wind turbine



ENGINEERING
sener, aeroblade, IDOM, CARRENEWABLES, VIRLAB, saitec, nabla wind hub

MONITORING AND CONTROL SYSTEMS
ALERION, INALIA, Qumiker, PcVue

DRIVE - TRAIN
SIEMENS Gamesa RENEWABLE ENERGY, Indar, Ingeteam, lancor

PITCH SYSTEMS
GLUAL energy, HINE, VOSS, rexroth A Bosch Company

BEARINGS
LAULAGUN bearings, renogear

FASTENING SOLUTIONS
ERREKA

LUBRICATION SYSTEMS
Atten[2], INTZA

CABLING
Cenes, GUREAK

YAW BRAKES
antec

TOWER
HWS, NAVACEL Process Industries, euskalforging, haizea windgroup, windtechnic, GRI Renewable Industries

LIFTING & HANDLING EQUIPMENT
KIMUA, Amenabar, Liftra, SpanSet, slingsintt, ZEUKO

OFFSHORE FOUNDATIONS
NAVACEL Process Industries, WindWaves, VICINAY marine, saitec offshore technologies, euskalforging, sener, Nautilus Floating Solutions, haizea windgroup

GRID CONNECTION
ormazabal velatia, Jema, ditrel, AEG, arteche, FANOX, Ingeteam

OTHER PRODUCTS & SOLUTIONS
innomat coatings, Galvasola, dinnteco, Composite Patch

wind energy BASQUE COUNTRY

The Basque Country is home to two global leaders in the development of wind energy, namely Iberdrola and Siemens Gamesa

Iberdrola

Iberdrola is one of the largest electric utilities in the world. The company has positioned itself as leader in clean energies: Iberdrola is the top renewable energy producer in Europe, a global leader in terms of installed onshore wind power and a pioneer in offshore wind development.

Key figures

€10.73 billion
(90% for the development of new renewable capacity and smart grids)

45,000
employees

72%
renewable energy owned installed capacity

2,500 MW
new additions (renewable energy)

40,000 MW
under operation (renewable energy)

10 GW
offshore wind pipeline forecast for 2030

Source: Iberdrola

SIEMENS Gamesa RENEWABLE ENERGY

Siemens Gamesa Renewable Energy, based in the Basque Country, is the only company operating at a global scale across the entire wind spectrum – onshore, offshore and services. In 2022, it was the fourth global wind turbine manufacturer with 9.3 GW.

Key figures

> 100 GW
installed worldwide

26,000
employees

€10.2 billion
annual revenue

€6.9 billion in procurement volume

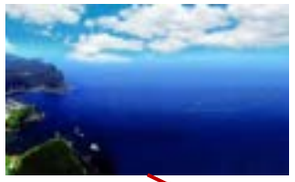
€32.5 billion
order book

79 GW
fleet under maintenance

Source: Siemens Gamesa

wind energy BASQUE COUNTRY

Value chain with capacities and experience in floating wind



DEVELOPERS

Iberdrola · Mitsubishi Corporation · Simply Blue Group · EDP

ENGINEERING

ESTEYCO · ISATI · saitec offshore technologies · sener · IDOM · EUREKA!

INSTALLATION, OPERATION & MAINTENANCE

Iberdrola · SIEMENS Gamesa RENEWABLE ENERGY · Ingeteam · ALERION · slingsintt · aerblade · INALIA INNOVATING DIFFERENTLY · Liftra · KIMUA · CoreMarine · HWS Let's Build Smarter · tecuni

R&D CENTRES

BiMEP Biscay Marine Energy Platform · tecnalia · ikerlan · cidetec MEMBER OF BASQUE RESEARCH & TECHNOLOGY ALLIANCE · Tekniker · MONDRAGON UNIBERTSITATEA · AZTI MEMBER OF BASQUE RESEARCH & TECHNOLOGY ALLIANCE · ceit

WIND TURBINE & COMPONENTS

SIEMENS Gamesa RENEWABLE ENERGY · ERREKA · innomar · Ingeteam · eskalforging · SOVERIN CONTROL · LAULAGUN bearings · antec · GLUAL hydraulics · QASE ELEVATION SYSTEMS · trafag sensors & controls · EQUIPAMIENTOS EÓLICOS · GAINZA FORGE · rexroth A Bosch Company · HINE

TOWERS & TRANSITION PIECES

haizea wind · eskalforging · GAINZA FORGE · navacel · GRI Renewable Industries · kera-coat · sidenor · GRUPOAMPER Nodón Naval-Offshore · trafag sensors & controls

FLOATING FOUNDATIONS

HiveWind · saitec offshore technologies · ISATI GLOBAL SOLUTIONS · ESTEYCO

MOORING SYSTEMS

VICINAY marine · IRIZAR FORGE · INALIA INNOVATING DIFFERENTLY

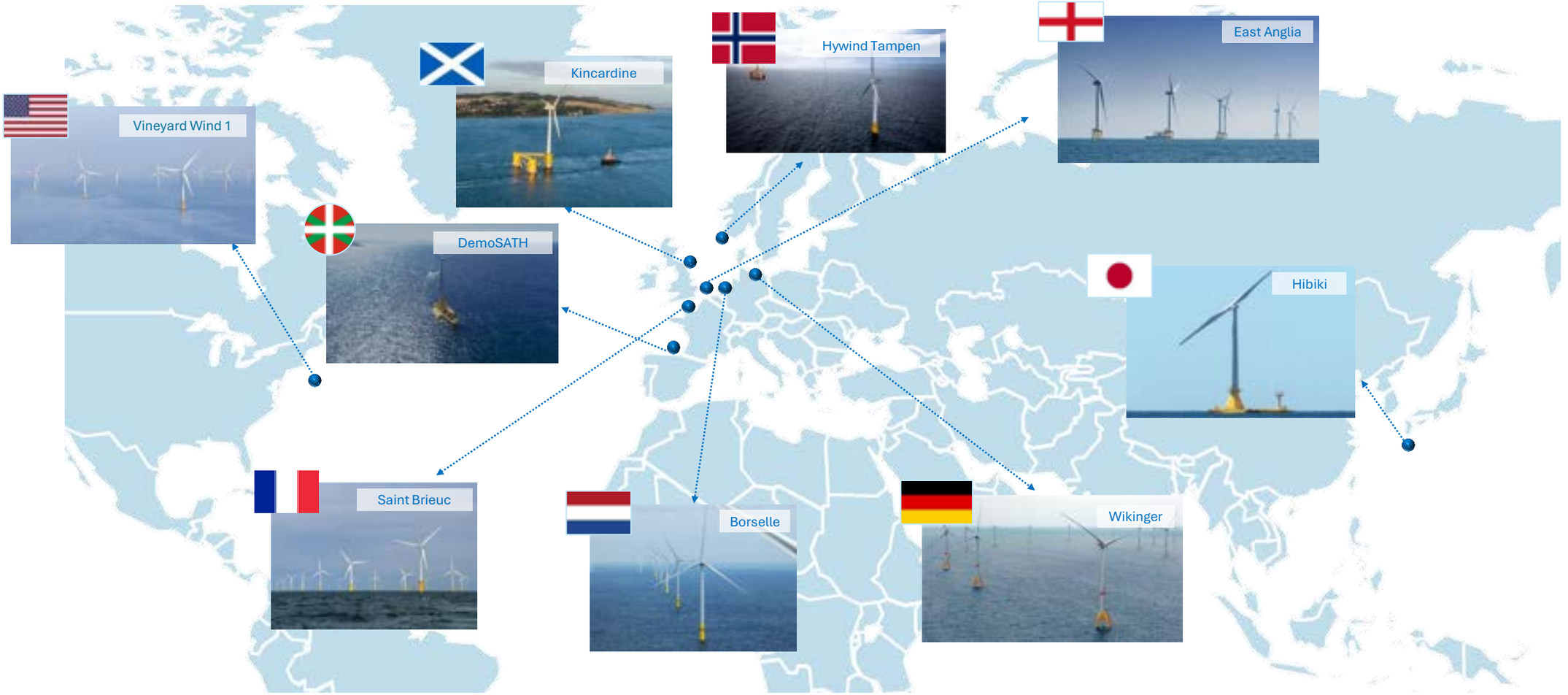
ELECTRICAL CONNECTION

ditrel · Lumiker RDT company · ormazabal velatia

wind energy BASQUE COUNTRY

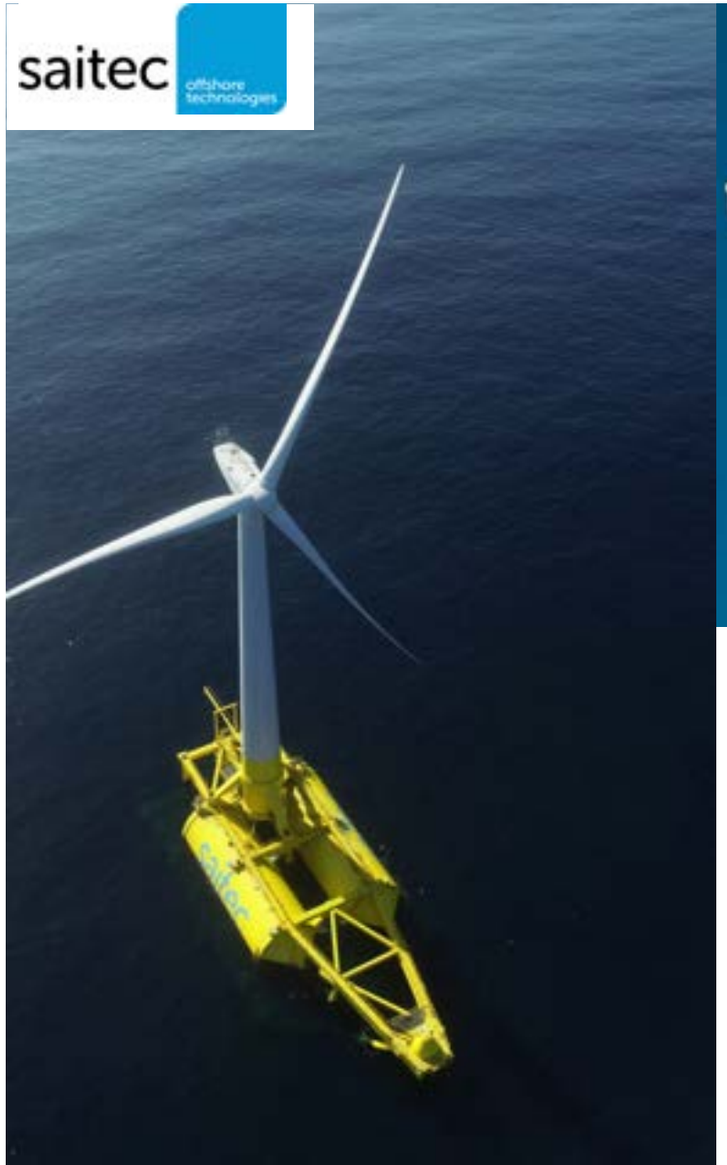
Basque companies are involved as suppliers in most offshore wind farms worldwide, both bottom-fixed and floating projects

Examples of key projects involving Basque companies



wind energy BASQUE COUNTRY

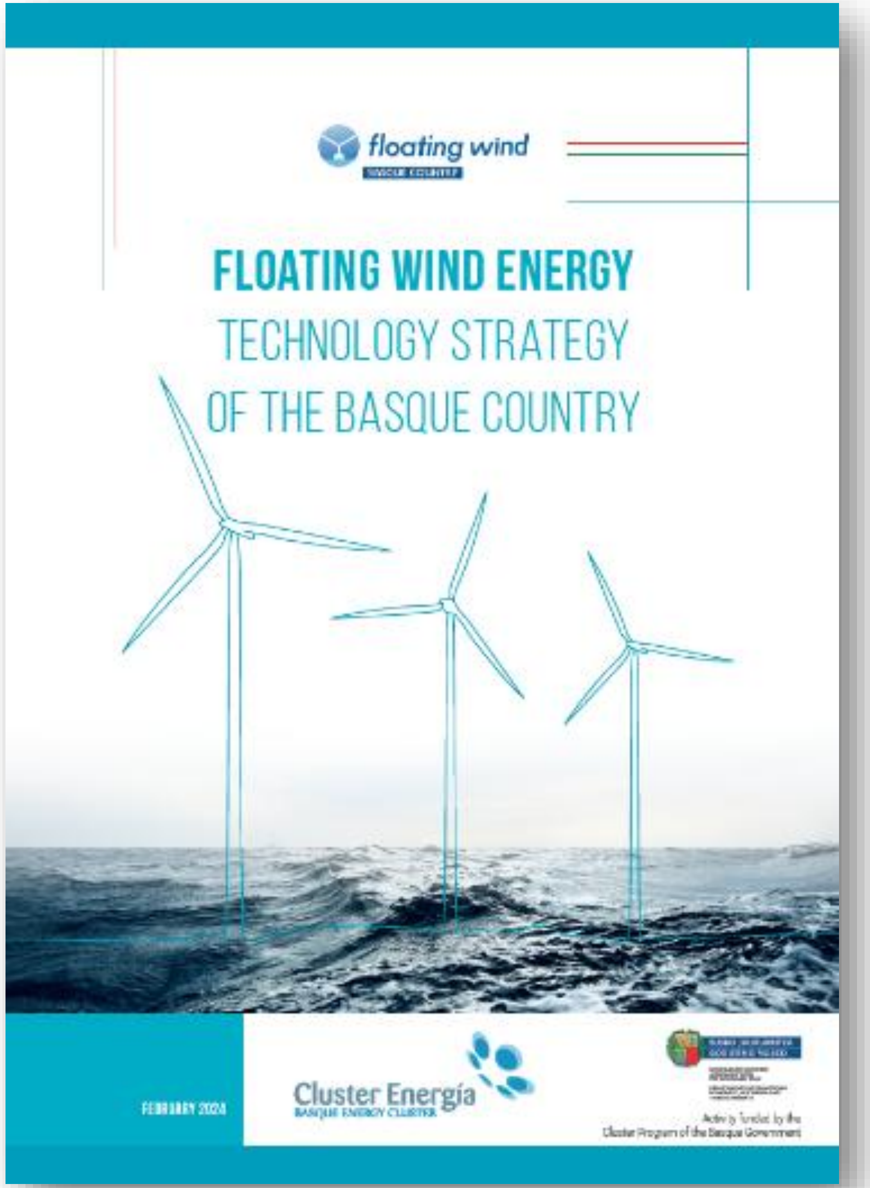
DemoSATH - 75% of construction budget from < 25km

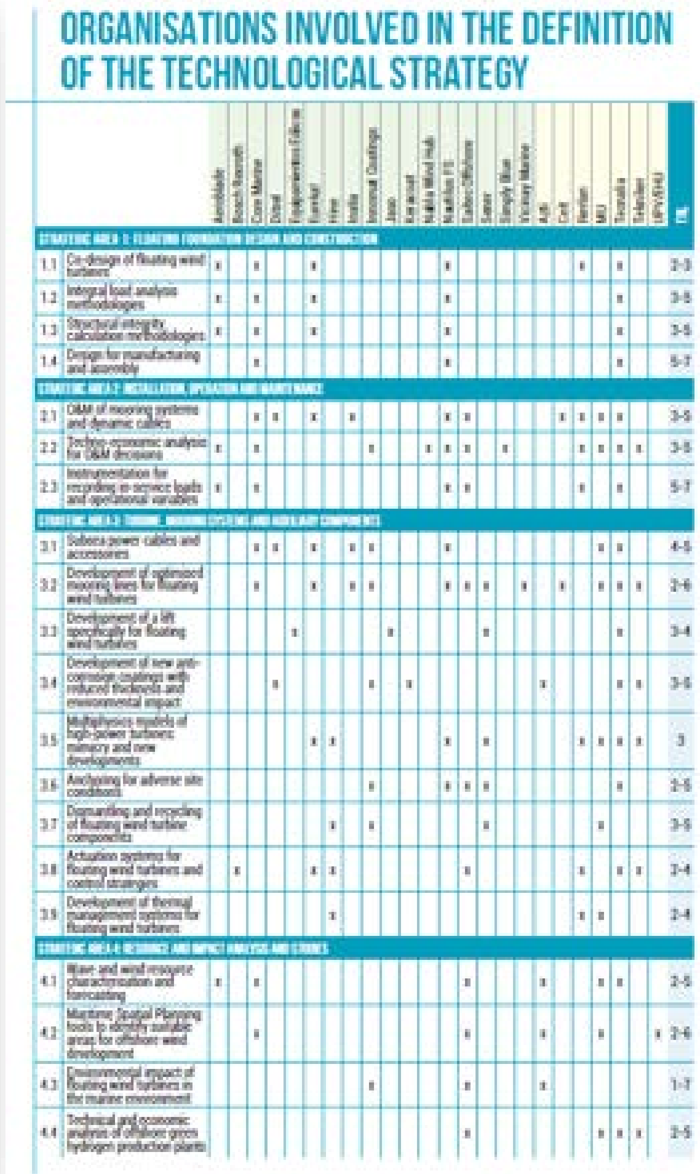


- 2 MW
- 30x70 meters
- Installed in BiMEP, 2 miles from the coast
- Depth of 85 meters

wind energy BASQUE COUNTRY

Basque Floating Wind Energy Technology Strategy





Collaboration of 17 companies and 7 R&D organisations from the Basque Country

20 technological lines in **4 strategic areas**:

- Platform Design and Construction
- Installation, Operation & Maintenance
- Turbine, Mooring and Aux. Components
- Resource and Impact Analysis and Studies

Each technological line includes a description and detail of the scope of the challenge and the **main R&D areas** considered

wind energy BASQUE COUNTRY

Collaborating in key R&D initiatives

i3float — A EUROPEAN INITIATIVE DESIGNED TO STRENGTHEN THE FLOATING OFFSHORE WIND ENERGY VALUE CHAIN

Coordinator: BASQUENERGY CLUSTER

24 members

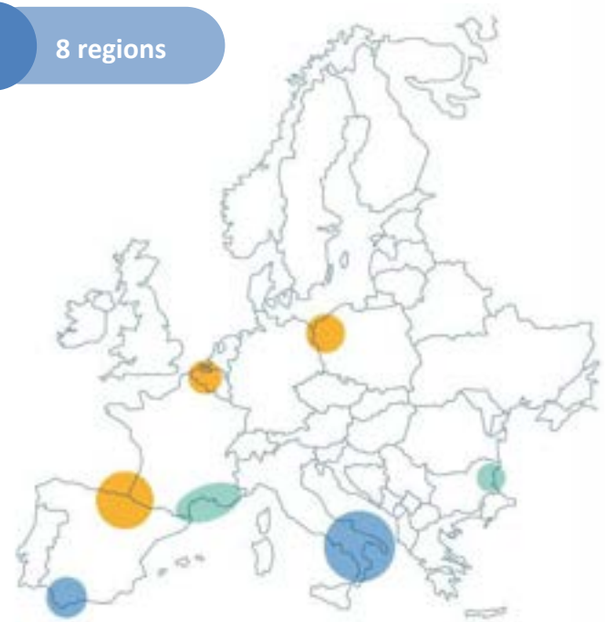
8 regions

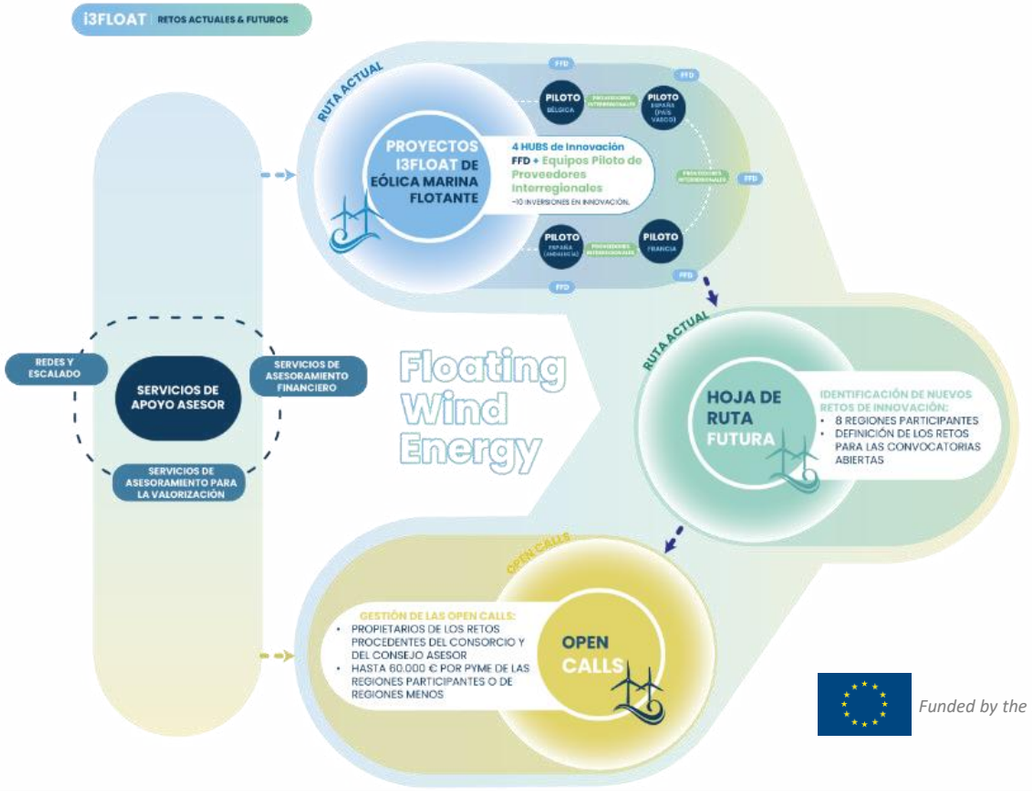
Cluster Partners: POLE MER, BLUE CLUSTER, CMC, BIG, CLANER, MCB, WIND INDUSTRY HUB

MARKET-ORIENTED CLUSTERS
- ANDALUSIA (SPAIN)
- CANARY ISLAND (SPAIN)
- CAMPANIA (ITALY)

INDUSTRY CLUSTERS
- BASQUE COUNTRY (SPAIN)
- FLANDERS (BELGIUM)
- WEST POMERANIA (POLAND)

COVERING BOTH SIDES
- VARNA (BULGARIA)
- OCCITANIE (FRANCE)
- PROVENCE-ALPES COTE D'AZUR (FRANCE)





Funded by the European Union

Basque Hazitek programme

NEW SOLUTIONS OF FLOATING O&M FOR CRITICAL COMPONENTS

FLOWIND

Coordinator: saitec offshore technologies

Basque Elkartek programme

RUL OF MOORINGS AND UMBILICALS FOR OFFSHORE RENEWABLES

RULET

Coordinator: tecnalia MEMBER OF BASQUE RESEARCH & TECHNOLOGY ALLIANCE

Basque Hazitek programme

STRUCTURAL INTEGRITY USING MODELS BASED ON AI

INTEGRIA

Coordinator: ayesa

wind energy
BASQUE COUNTRY

Wind EUROPE
ANNUAL EVENT
2026
MADRID
21-23 APRIL

WIND ENERGY
BASQUE COUNTRY PAVILION

BASQUENERGY CLUSTER

Join us at HALL 10

10-G80

haizea windgroup
ERREKA
SpanSet
SPARES IN MOTION

10-G90

saitec offshore technology
PcVue

10-G100

S.O.L. GALEA, S.L.
BEZABALA
Bilbao PORT
Uniport Bilbao

10-G110

NAVACEL
COESSIO
ALERION
aeroblade
BASQUENERGY CLUSTER

10-G120

GEINSA TELEMATIK
rumcab PROJECTS
dinnteco
IDOM

10-F80

nabla wind hub
GLUAL energy
KIMUA

10-F90

arteche
sener

10-F100

VICINAY Cemvisa
Basque Maritime Cluster
ormazabal velatia

10-F110

FERRI
ditrel
SAINT-GOBAIN
antec Reliability is a must.

10-F120

gometegui
OHINE
LAULAGUN bearings

BASQUENERGY CLUSTER

Energy Industry Land | Energia Industriaren Lurraldea

Thank you!

Ander González
agonzalez@basquenergycluster.com

Danish offshore wind market

Carsten Chachah
Green Power Denmark

GREEN
POWER
DENMARK

About Green Power Denmark

Represents 1,250 members, 800 co-operative members and 200 members of associated associations.

Founded on March 23, 2022.

Acts as the voice of the entire value chain from the manu-facturer of the bolt used in a wind turbine to RE owners and developers as well as DSOs and energy traders.

Offices in Copenhagen, Aarhus, and Brussels.

Approx. 125 employees.

GREEN POWER DENMARK

Ambition in the 2023 political agreement for offshore wind following the Thor-tender with a de facto concession payment

- Thor tender of 1 GW awarded in 2021 with a de facto concession payment of 2.8 billion DKK.

- Subsequent 2023 political agreement to tender
  - 6 GW radial offshore wind and
  - 3 GW energy island offshore wind

  all without state aid

- After failed tender in december 2024, realisation that state aid is needed for revised tenders

GREEN POWER DENMARK

Revised 2.8 GW radially connected offshore wind tender in 2025 political agreement (revised down from 6 GW)

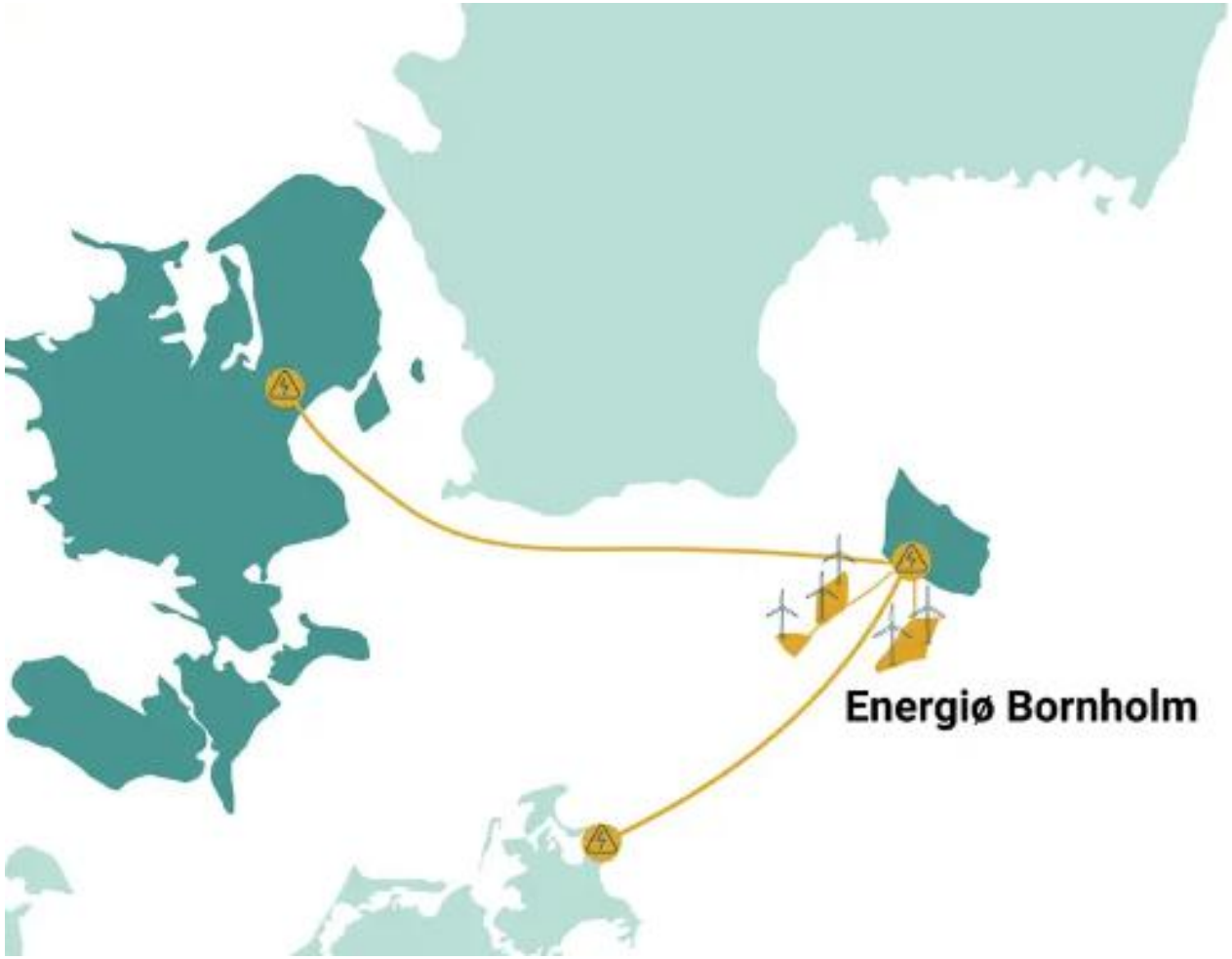
- 2.8 GW tender on 3 sites opened in november 2025 with a 2-sided capability based CfD and an overall state-aid budget cap of 44 billion DKK.

- Hesselø – 0.8 GW, 2032
- Nordsøen Midt – 1 GW, 2032
- Nordsøen Syd – 1 GW, 2033

- Bid deadline for ‘Hesselø’ & ‘Nordsøen Midt’ in May 2026.

GREEN POWER DENMARK

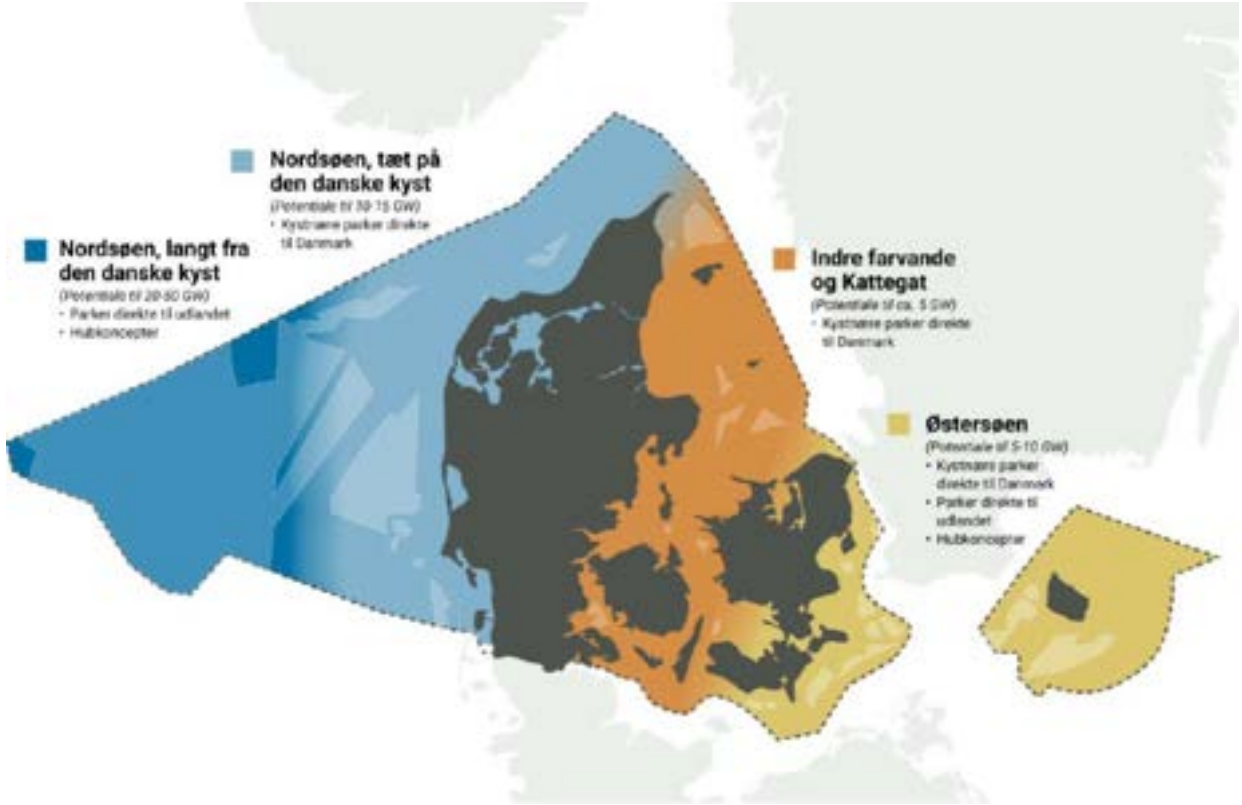
Revised 3 GW Energy Island Bornholm tender agreed between Denmark and Germany January 2026



- 3 GW offshore wind connected to HVDC hub on Bornholm with interconnectors to Denmark and Germany.
- 50/50 (DK/DE) split on cost for infrastructure
- 30/70 (DK/DE) split on subsidy cost for offshore wind.
- Expected Commissioning 2034-2036

GREEN POWER DENMARK

Vast Danish sea area enables perspectives for export oriented focus going forward



- Offshore wind resource exceeds domestic demand
- Prospect of cross border radial projects directly connected to offtaker countries
- Further development of energy island build out
- Need for a market driven scheme to continuously test the market's appetite for merchant projects

GREEN POWER DENMARK

Welcome to ETZ

ETZ

ENERGY TRANSITION ZONE

Our Vision

Is for North East Scotland to remain a global leader in energy excellence with a world class **supply chain**, pioneering **low carbon** projects and a thriving economy

Our Purpose

To accelerate North East Scotland's energy transition to create lasting **jobs** and **prosperity** for the region, Scotland and the UK

An overview of North East Scotland's Energy strengths

Oil & gas infrastructure and expertise

World-class energy supply chain

Collaborative innovation ecosystem

Energy Transition Zone

Subsea engineering and technology

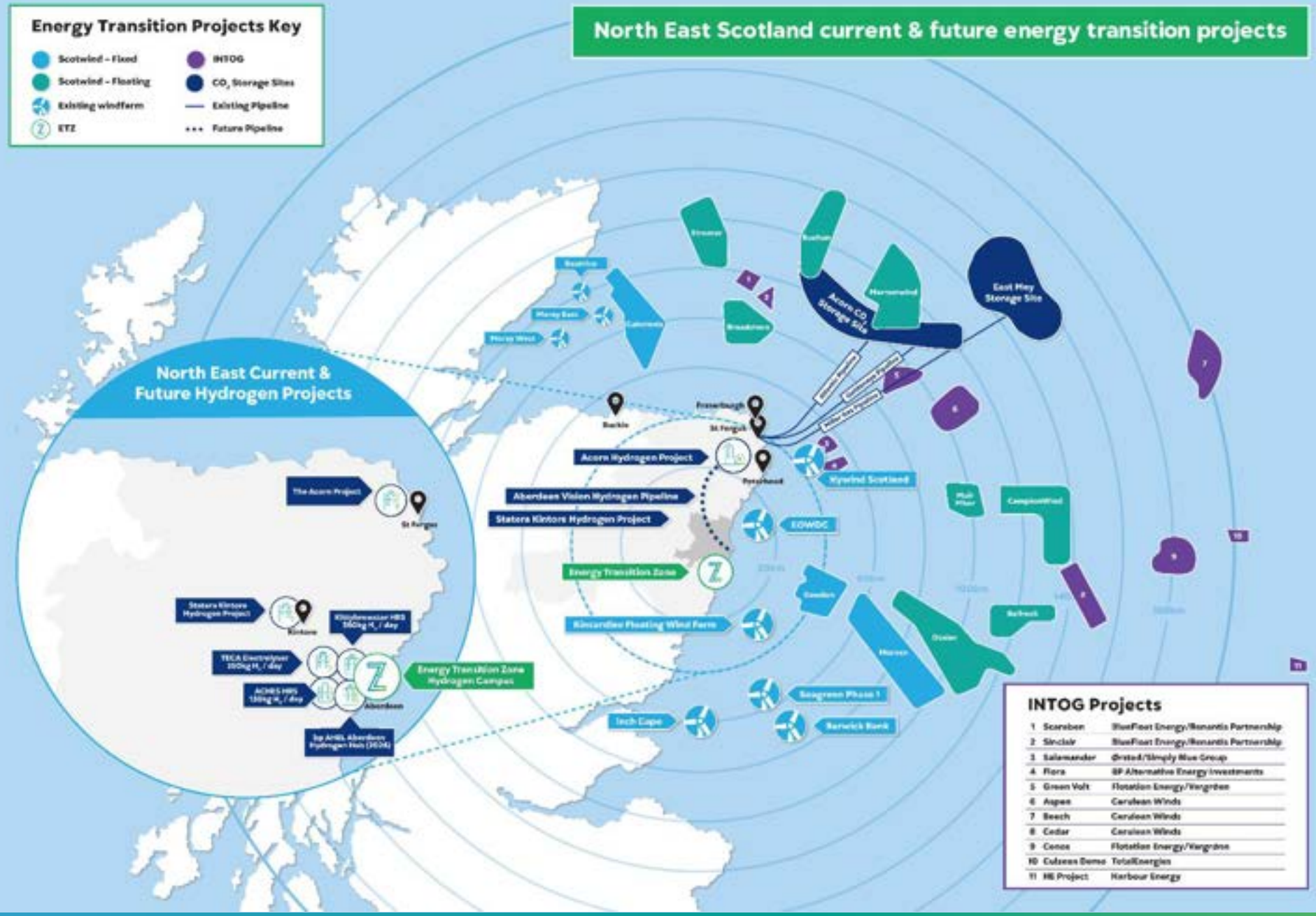
Industry-focused universities & college

Ongoing Energy Transition projects

Port infrastructure and capability

A region with the right credentials and a strong track record of delivery to embrace a low carbon energy future

North East Scotland current & future energy transition projects



Our Value Proposition – how can we help?

Energy and economic development expertise - extensive regional and international networks – independence - ability to deliver tangible results at pace

- We are energy and economic development experts
- We know the region and its strengths
- We deliver tangible benefits for everyone
- We understand the supply chain, its strengths and challenges
- We are a trusted, collaborative partner
- We are solutions driven and innovative
- We make funding accessible
- We have proven track record of delivery and impact
- We are independent, not-for-profit and bridge the public-private sectors
- We have local, regional and international connections
- We lead and convene networks and partnerships
- We deliver property and infrastructure solutions aligned with net zero principles

ETZ CAMPUS PROJECTS

ENERGY TRANSITION ZONE

National Energy Skills Accelerator

Mission

- A ‘one stop shop’ to access a wide range of energy courses, skills development programmes and R&D capabilities in the partner institutes

Regional Port Infrastructure

North East Scotland Investment Zone

- **£160 Million** funding package from UK and Scottish Government
- Targeted investment to unlock growth in **digital tech and green energy**
- **Two dedicated tax sites** to support world class supply chain:
  - **Peterhead** (Aberdeenshire)
  - **Energy Transition Zone** (Aberdeen City)
- **Tax site fiscal incentives** include:
  - Land & Buildings Transaction Tax Relief
  - Non-Domestic Rates Relief
  - Enhanced Capital Allowances
  - Enhanced Structures and Buildings Allowance
  - Employer National Insurance Contributions Relief

Unlocking Investment in Partnership


sarens PSG
PORT OF ABERDEEN
Marine Gateway
INTEGRITY
subsea 7
Air Liquide
DFDS
Hydrogen Campus
Green Hydrogen Test & Demonstration Facilities
wood.
Innovation Campus
ET2 EnergyWorks
Skills Campus
Energy Transition Skills Hub
ABB
NOV
CATAPULT
D2Zero
Wind Campus
Floating Wind Innovation Centre
element
ROSS
SAFETY & SURVIVAL
EXPRO
NorSea
SIEMENS
Sinomine
AJT
Weatherford
WÄRTSILÄ
Craigpark Road
Souter Head Road

Energy Supply Chain Support

ENERGY TRANSITION PATHWAY

STAGE 1

- Energy Transition Masterclasses
- Digitalisation; build a digital roadmap to support business growth strategy
- Fit for Offshore Renewables
- Accessing Low Carbon Markets Strategy Workshops
- Internationalisation; supporting companies to grow export revenue
- Specialist Workshops
- Innovative Solutions; ETZ EnergyWorks
- Land and Property Support / Property Improvement Fund

STAGE 2

Support Funding

Infrastructure, Capital Equipment, Property Improvement
Energy Efficiency, Partner support programmes

A region with the right credentials and a strong track record of delivery to embrace a low carbon energy future

NETZERO

ENERGY TRANSITION ZONE

For further information on the Energy Transition Zone, contact:

Jacqui Watt, Development Manager: jacqui.watt@etzltd.com

WIND EUROPE 2026

Meeting Cluergal – Marine Renewables Canada

22/04/2024

Overview of Offshore Wind Plans/Developments in Galicia

Overview of Offshore Wind Plans/Developments in Galicia

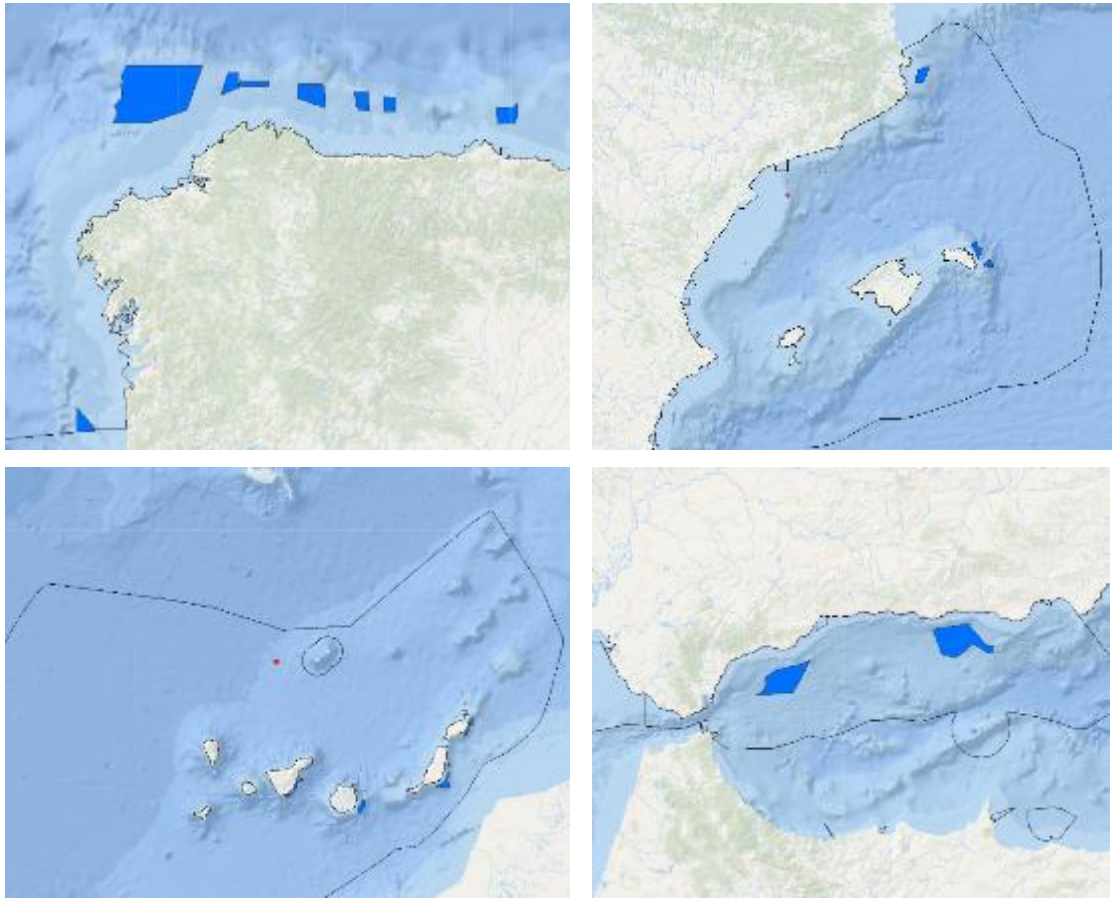
Spatial Maritime Planning (Plan de Ordenación Espacial Marítima POEM)

The classification of certain area as ZAPER zone responds to the fulfilment of the following limitations:

- Water depth not over 1000 metres
- Wind resource over 7.5 m/s as month average velocity at 100m height
- Onshore electrical substation potentially available next to the zone

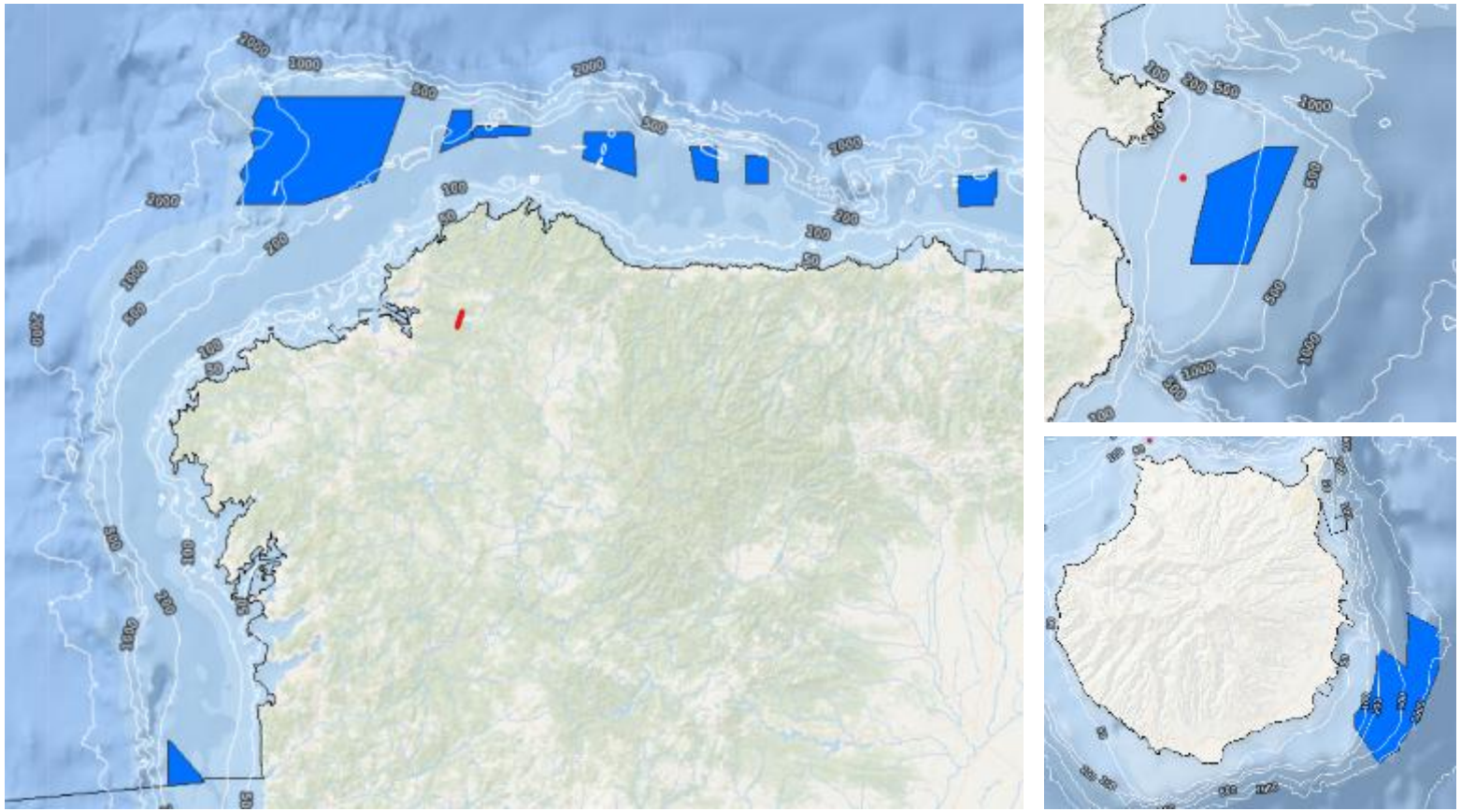
Additionally, the zone has been analysed form the point of view of other uses and economic activities, analysing parameters such as:

- Biodiversity interests
- National Defence activities
- Aviation activities
- Maritime traffic and ports activities
- Marine aquiculture activities
- Fishing activities
- R&D activities
- Mooring and submarine cables restrictions
- Natural submarine heritage
- Maritime and shore interface and infrastructure activities



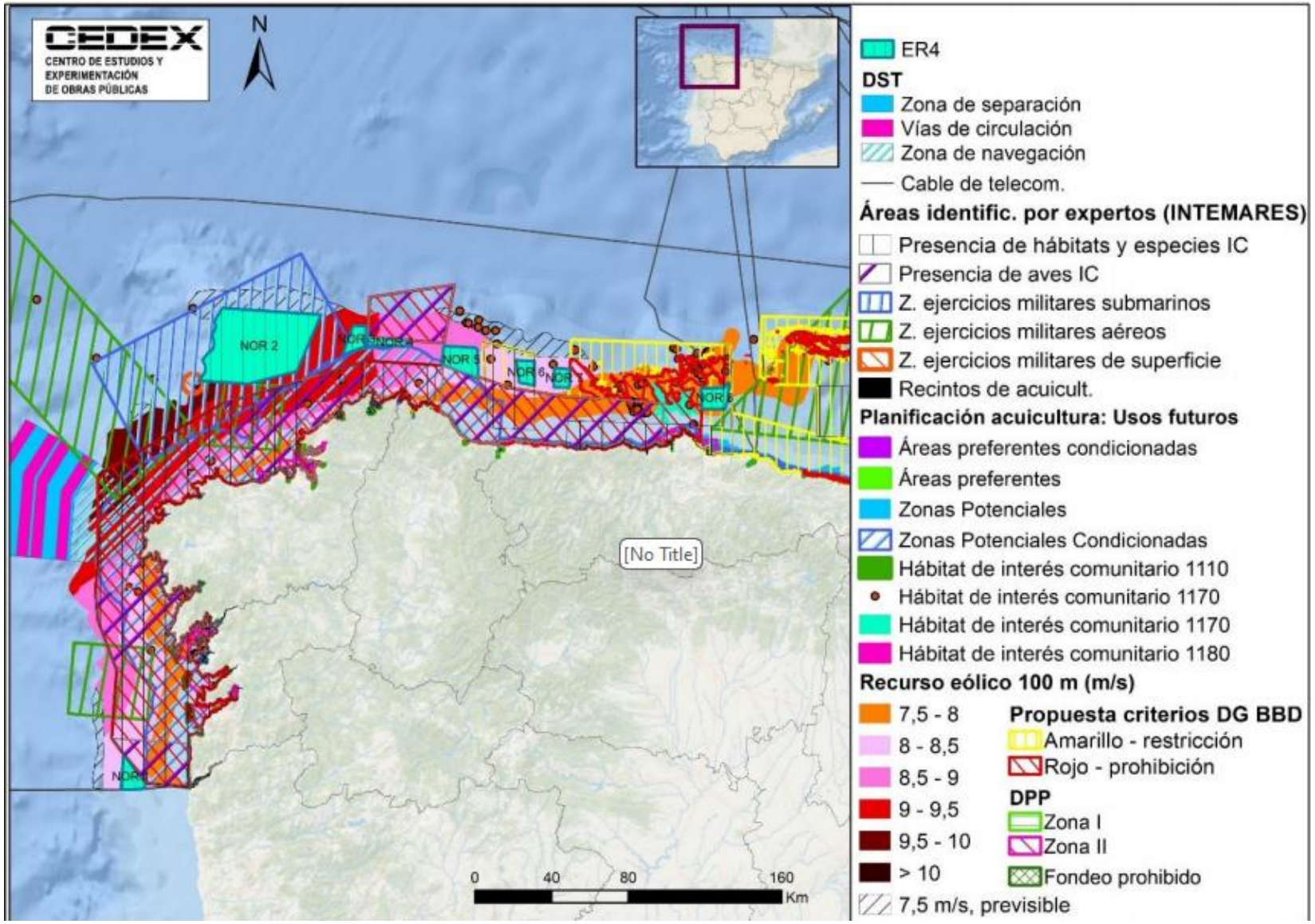
Overview of Offshore Wind Plans/Developments in Galicia

Spatial Maritime Planning (POEM). Bathimetry



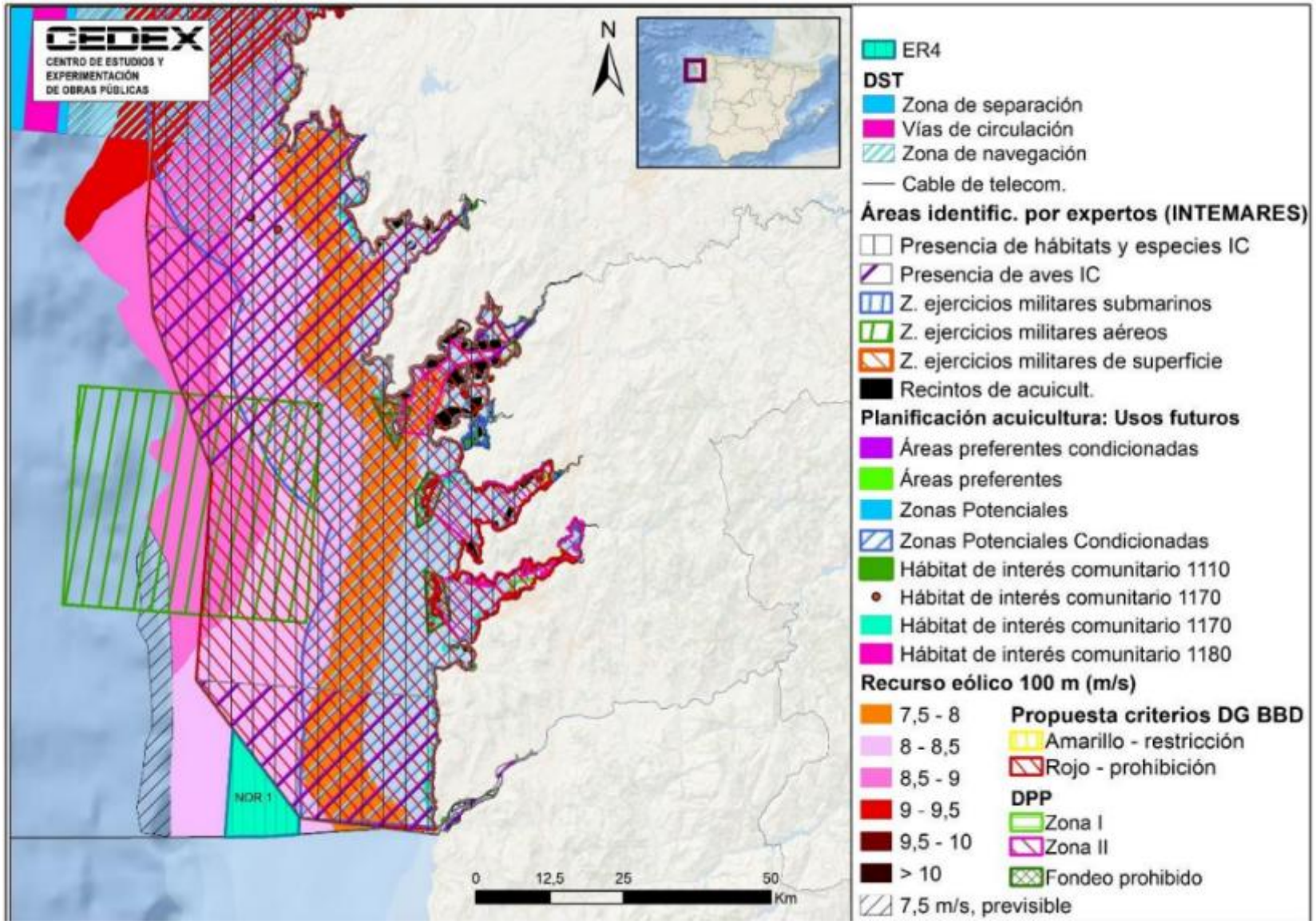
Overview of Offshore Wind Plans/Developments in Galicia

North Atlantic



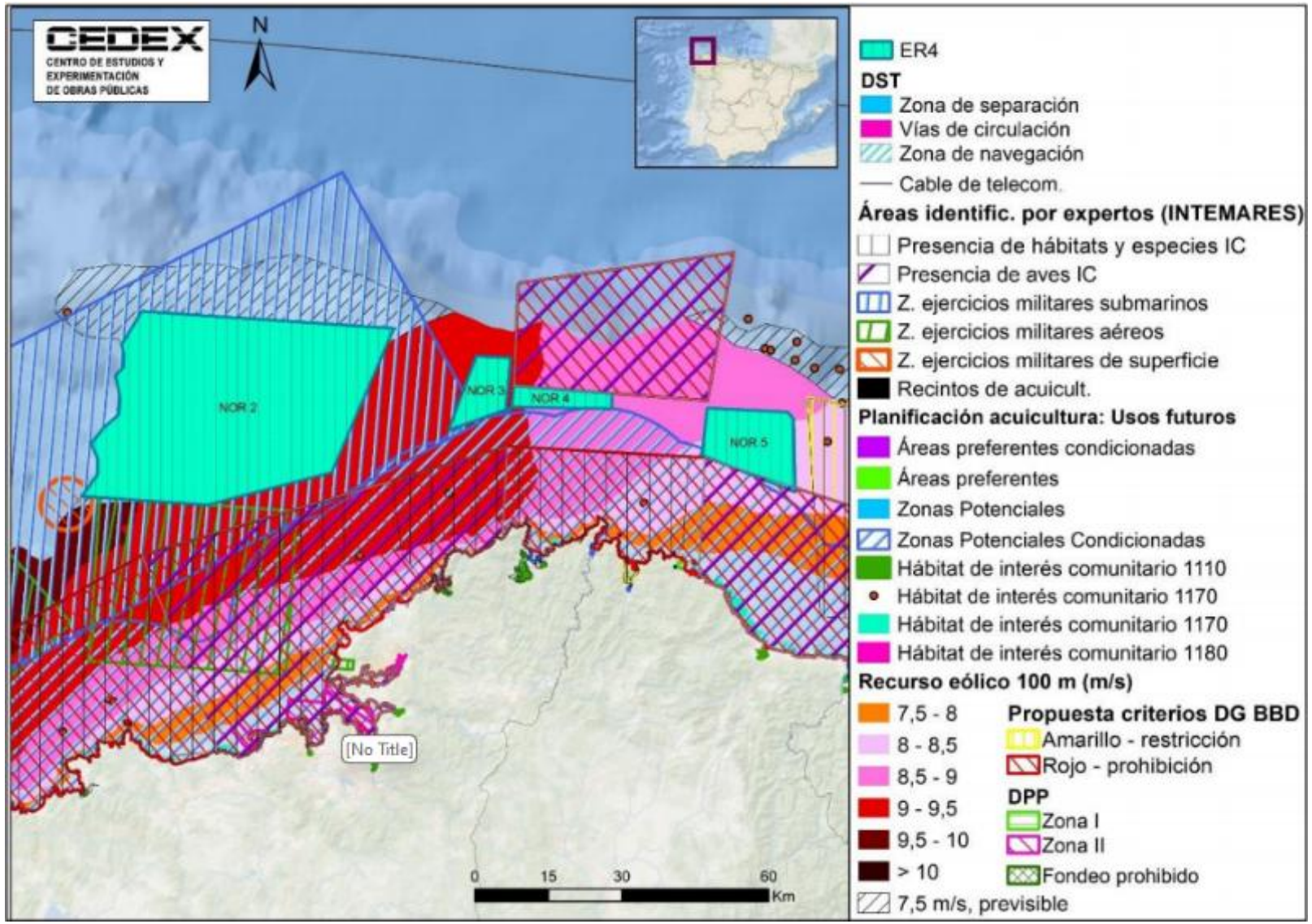
Overview of Offshore Wind Plans/Developments in Galicia

NorthAtlantic. NOR 1



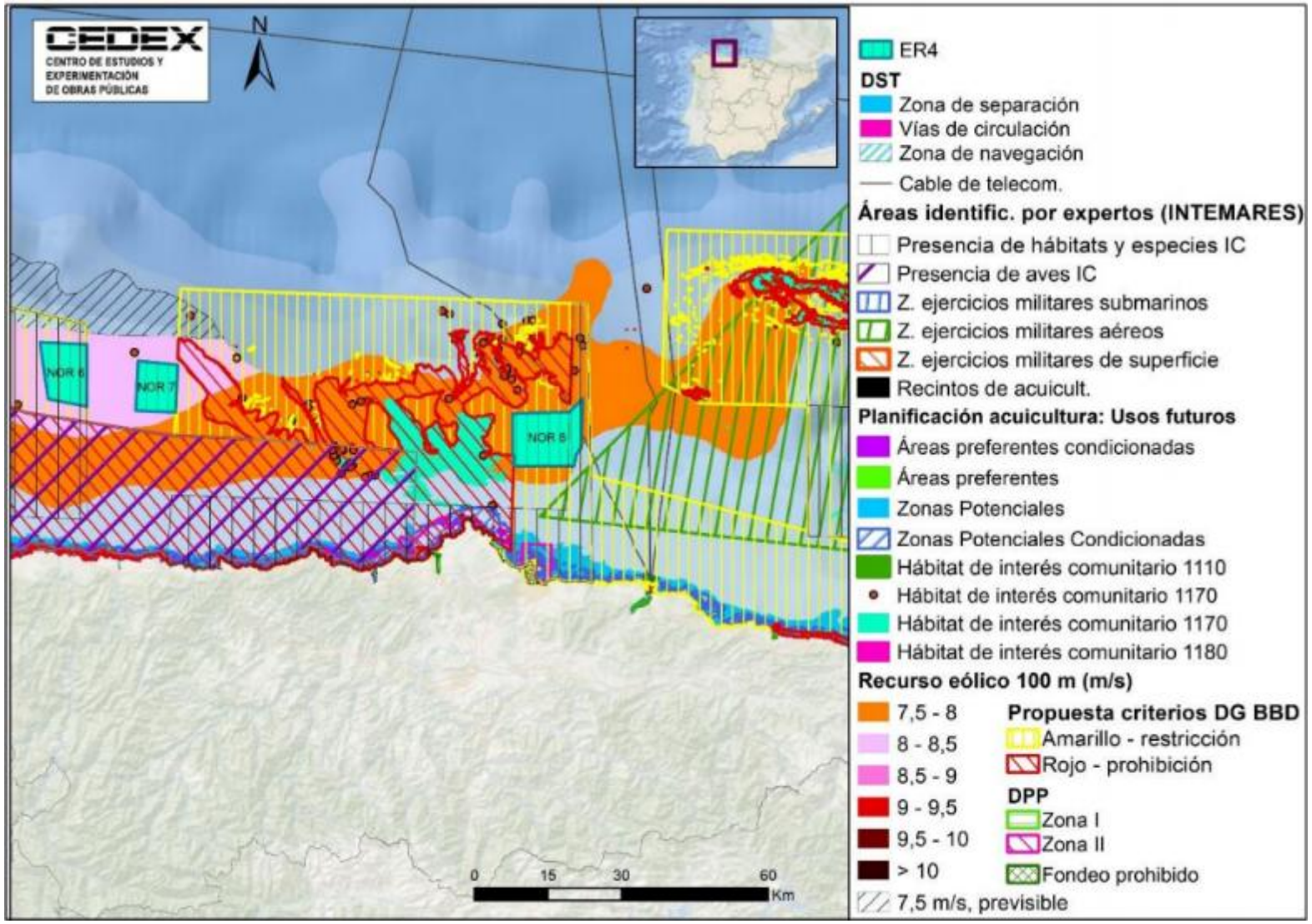
Overview of Offshore Wind Plans/Developments in Galicia

NorthAtlantic. NOR 2 , 3, 4, 5



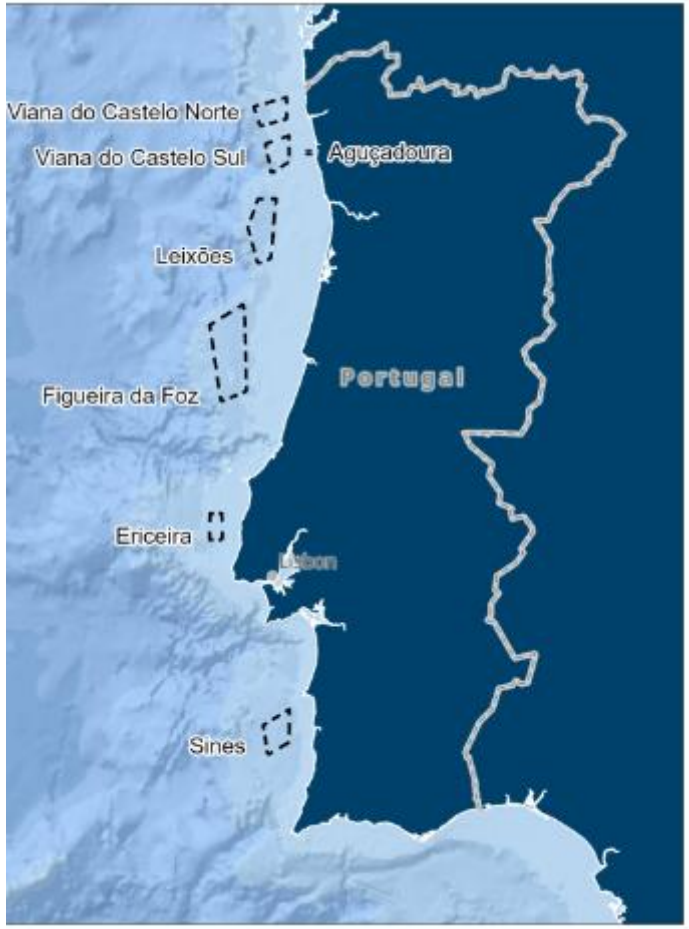
Overview of Offshore Wind Plans/Developments in Galicia

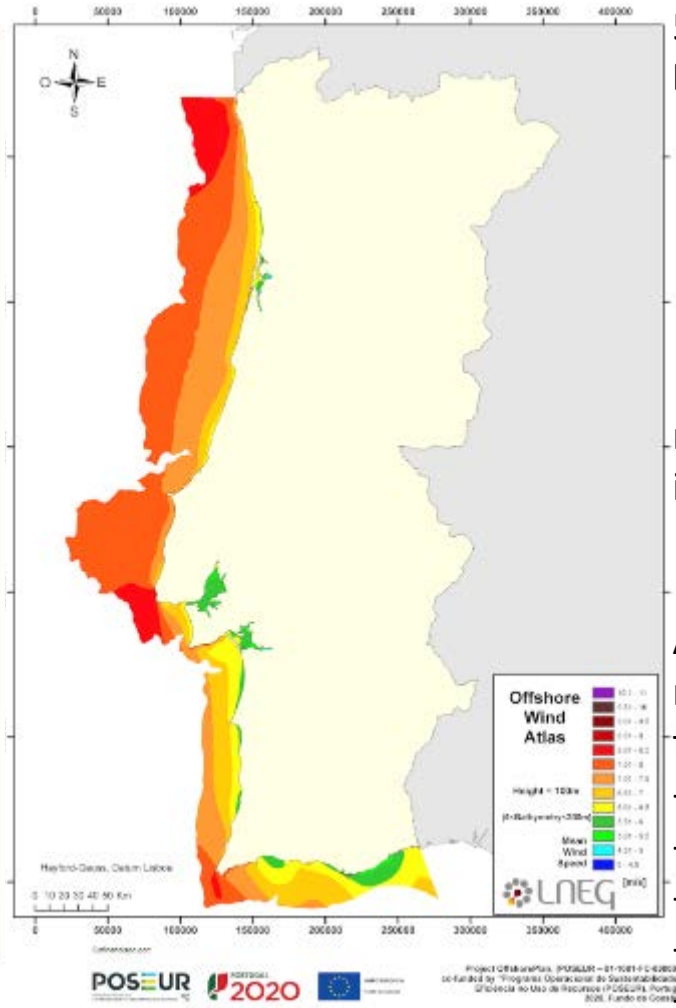
NorthAtlantic.NOR 2 , 3, 4, 5



Overview of Offshore Wind Plans/Developments in Galicia

Summary . The big figures.





5GW 2030 target 🎯 of floating wind capacity in the **Iberian Peninsula (2GW Portugal + 3GW Spain).** In other words:

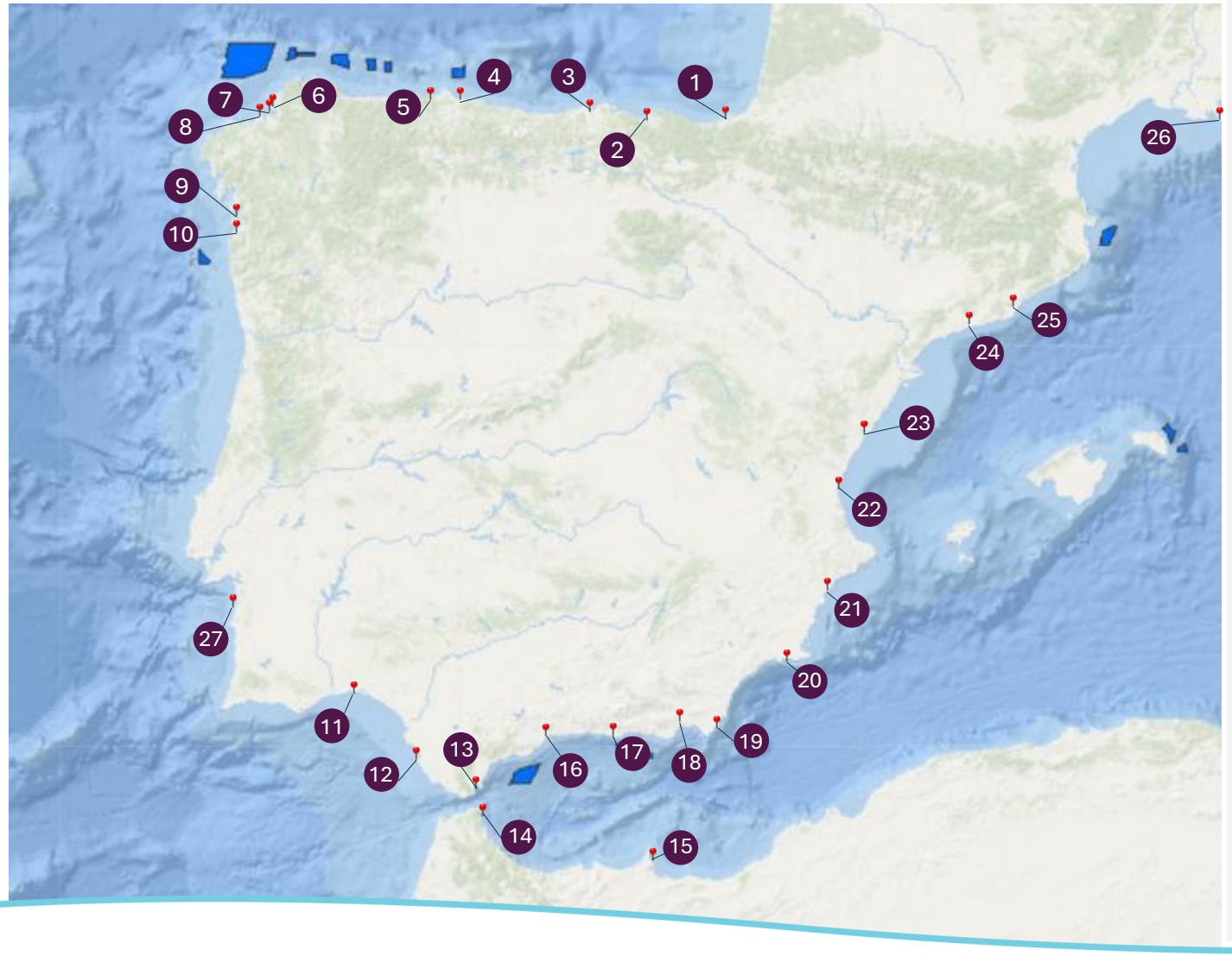
- 250 to 333 floating wind turbines in 5 years, 50-67 units/year. 😳
- ~1 500 000 tons of steel floaters or 😱
- ~8 000 000 tons of concrete floaters 🤔
- ~ 2 000 km of mooring lines 😅
- ~ thousands of km for power cables 😮‍💨
- Millions of hours of engineering,consultancy, management,sales,legal,financial, construction and offshore installation and maintenance 👨‍🔧 👩‍🔧
- 20 000 M€ - 25 000 M€ total investment

Auction rules are to be issued (when?) and what it is happening next? The ball will be on the industry's court. Many challenges to face:

- Harbours upgrades
- Increase wind turbines and floaters reliability
- Optimize Industrialization and serial production
- Training and recruitment of skilled manpower
- Tens of specialized offshore ships required

Key Projects and Companies active in the region

Main Harbours



1. Pasajes Harbour
2. **Bilbao Harbour**
3. Santander Harbour
4. **Gijón Harbour**
5. **Avilés Harbour**
6. **Navantia Ferrol Harbour**
7. **Ferrol outer Harbour**
8. **Langosteira Harbour**
9. Marín Harbour
10. **Vigo Harbour**
11. **Huelva Harbour**
12. **Cádiz Harbour**
13. **Bahía de Algeciras Harbour**
14. Ceuta Harbour
15. Melilla Harbour
16. Málaga Harbour
17. Motril Harbour
18. Almería Harbour
19. Carboneras Harbour
20. **Cartagena Harbour**
21. **Alicante Harbour**
22. **Valencia Harbour**
23. **Castellón de la Plana Harbour**
24. **Tarragona Harbour**
25. **Barcelona Harbour**
26. FRANCE: Fos Sur Mer
27. PORTUGAL: Lisnave

Main Galician Harbours

Key Projects and Companies active in the region

Steel Construction

FERROL

NAVANTIA FERROL-FENE PORT

LANGOSTEIRA PORT

Concrete Construction

LANGOSTEIRA PORT

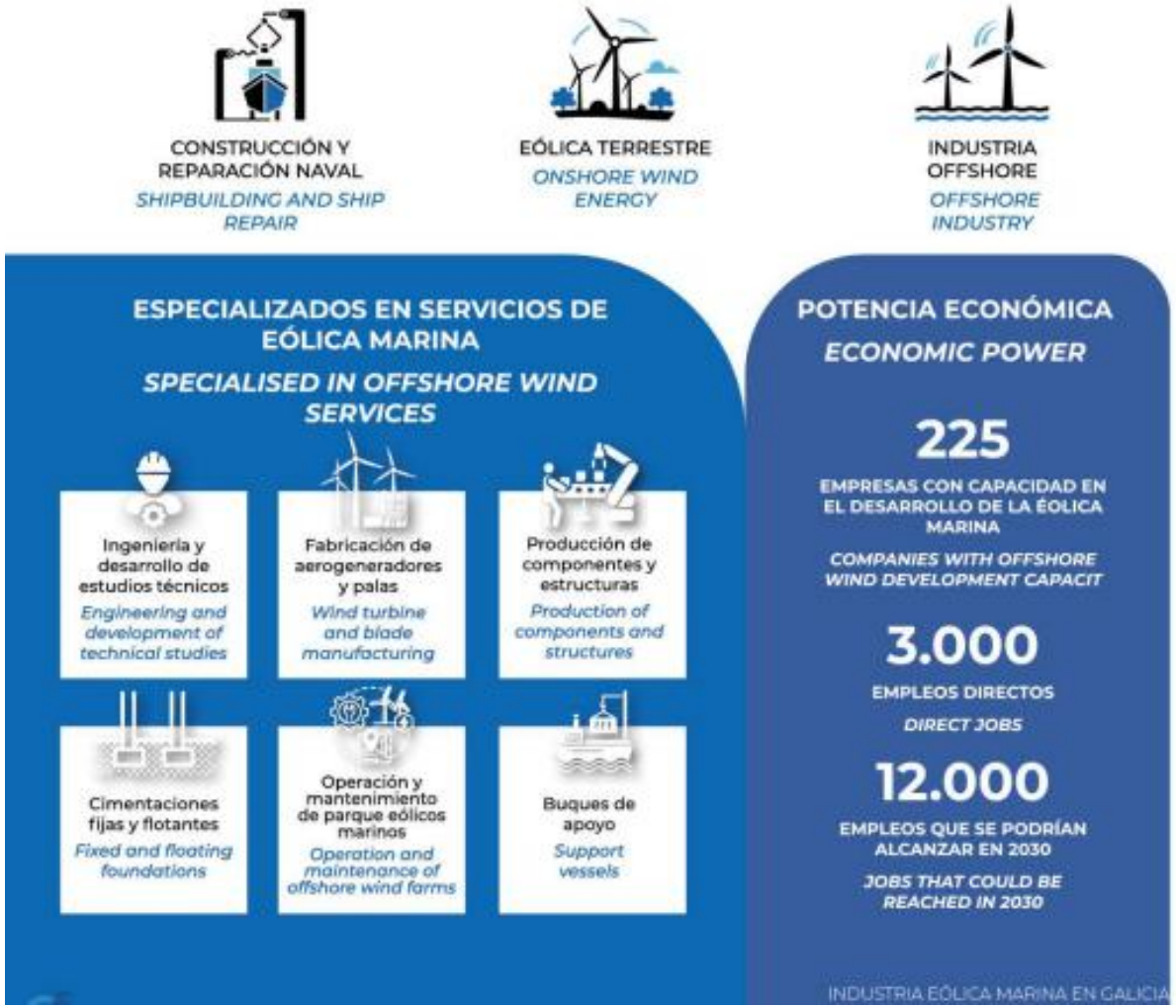
Shipbuilding – Maritime Services – O&M

VIGO PORT

MARIN-PONTEVEDRA PORT

Key Projects and Companies active in the region

The offshore wind industry in Galicia will bring together companies from the renewable energy sector, shipbuilding, and civil construction.



Key Projects and Companies active in the region

Main Players Offshore Wind: From developers to SME´s.

Worldwide Offshore Wind Leading Developers*

**In the red box, developers with offshore wind plans in Spain*

- Orsted (Denmark)
- RWE (Germany)
- EnBW (Germany)
- Vatenfall (Sweden)
- Northland Power (Canada)
- Iberdrola (Spain)
- Scottish Power (UK)
- Equinor (Norway)
- Ocean Winds (Spain)
- CORIO
- SSE (UK)
- Parkwind (Belgium)
- Shell (UK)
- Total Energies (France)
- EDF (France)
- BP (UK)
- Qair (France)
- Qenergy (South Korea)
- Skyborn Renewables (Germany)
- Elicio (Belgium)
- Baywa Re (Germany)
- COP Copenhague Offshore Partners (Denmark)

Important Local Players + Partnerships**

*** Since 2021, several alliances have been publicly disclosed. Some of them are still active, while others are on hold or have been cancelled.*

Cluergal members bring valuable experience in renewable energy development, making them strong partners for large developers.

Consultants can support development and origination.

- Iber BlueWind
- Capital Energy (Spain) → ~~Shell~~
- Acciona Energy → SSE
- Naturgy → ~~Equinor~~
- Qualitas Energy → ~~Corio~~
- Disa
- Endesa – ENEL
- Repsol – ~~Orsted~~
- Eni-Plenitude

Key Projects and Companies active in the region

Main Players Offshore Wind: WIND TURBINES

Vestas and Siemens Gamesa Renewable Energy already have facilities in Galicia. Other companies supplying wind turbine generator (WTG) components, such as towers, electrical equipment, logistics, WTG assembly and consultancy services, are also based in the region.

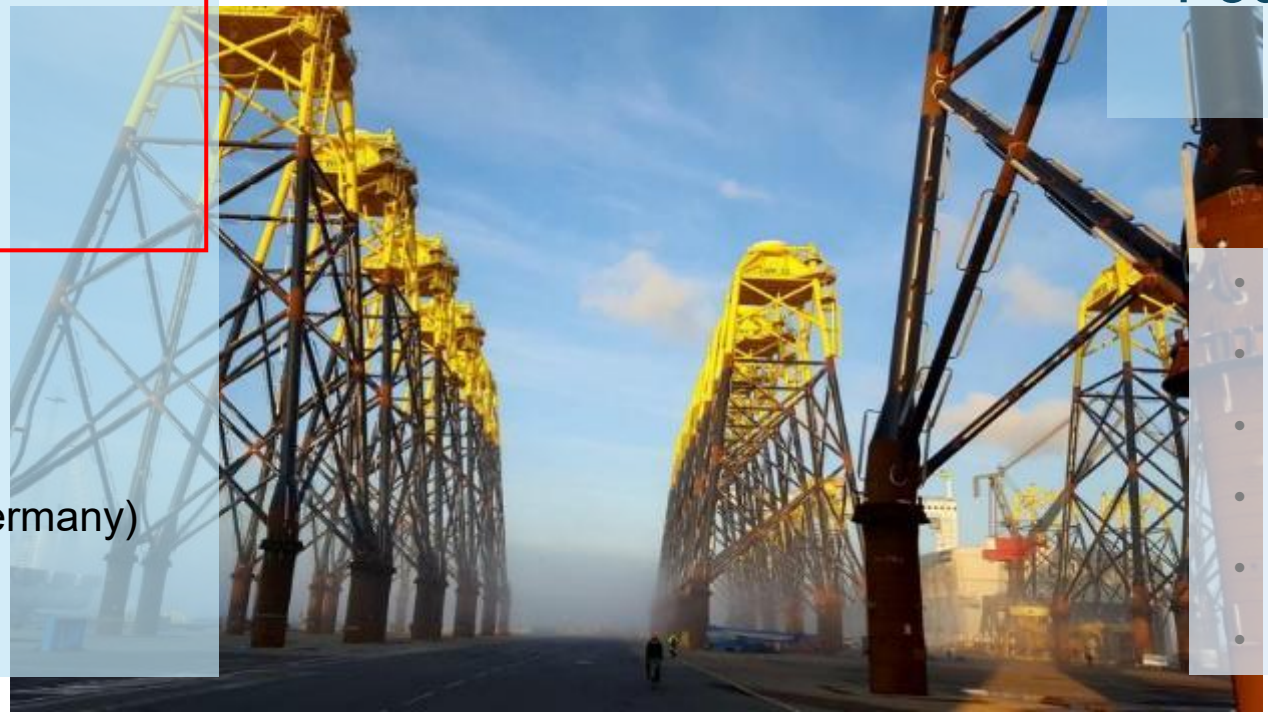
Wind Turbines

- Siemens Gamesa Renewables SGRE (Germany-Spain)
- Vestas (Denmark)
- General Electric GE (USA)
- MING YANG (China)
- Goldwind (China)
- Envision (China)

Key Projects and Companies active in the region

Main Players Offshore Wind : foundations, floaters, infraestructures

- Navantia Seanergies (Spain)
- GRI (Spain)
- Windar (Spain)
- Haizea (Spain)
- Bladt (Denmark)
- SiF (Netherlands)
- Smulders (Belgium)
- Steelwind Nordenham (Germany)
- EEW (Germany)



Foundations, Floaters, Infraestructures

- Ferrovial (Spain)
- Acciona Construction (Spain)
- ACS-Dragados (Spain)
- OHLA (Spain)
- FCC (Spain)
- Eiffage (France)

Key Projects and Companies active in the region

Main Players Offshore Wind: Cable

Tier-1 suppliers of submarine power cables (export and inter-array) for offshore wind farms. Prysmian and Nexans are present industrially and commercially. NKT has a commercial division.

While Galicia does not host major subsea cable manufacturers, local companies within the Cluergal cluster are well positioned to support these suppliers through industrial services, steel fabrication, and port logistics

Cable

- Prysmian (Italia)
- JDR (UK)
- Hellenic cables (Greece)
- Nexans (France)
- Hengtong Marine Cable (China)
- Sumitomo Electric (Japón)
- NKT (Dinamarca)

Key Projects and Companies active in the region

Main Players Offshore Wind : Shipbuilding and Auxilliary Industry

With a strong background in shipbuilding, renewables, energy and industrial services, Cluergal companies are ideally positioned to become key contributors to the offshore wind value chain in Galicia and Spain.

Shipyards

- Armon
- Freire
- Nodosa
- Marina Meridional
- Cardama
- Metalships

- Gondan
- Murueta
- Zamakona
- Balenciaga

Auxilliary Industry

… Tens of companies already working for shipbuilding, offshore , renewables industry.

Key Projects and Companies active in the region

Main Players Offshore Wind: Offshore installation and marine contractors services

This segment represents a supply chain gap where Spanish companies are actively positioning themselves.

Offshore Installation and Marine Contractors services

Courtesy of CBW – CAPITAL BLUEWIND by
BlueNewables and YouWind Renewables

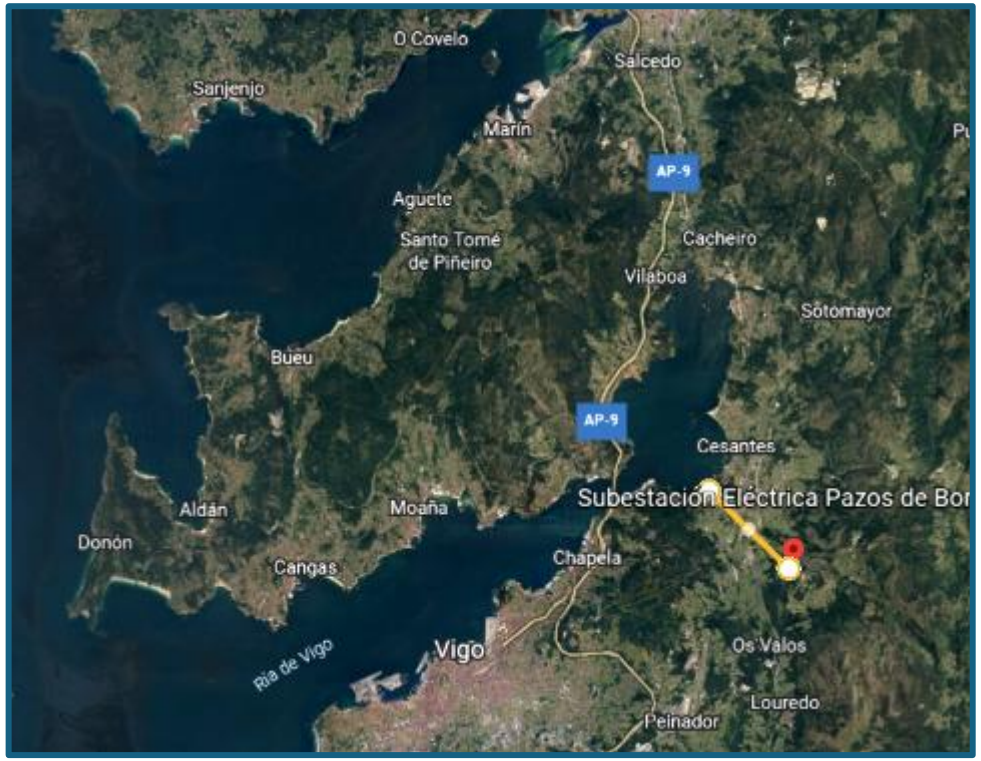
Marine AREA: NOR1

FARM SUMMARY

Blue development for the future energy

Network access points

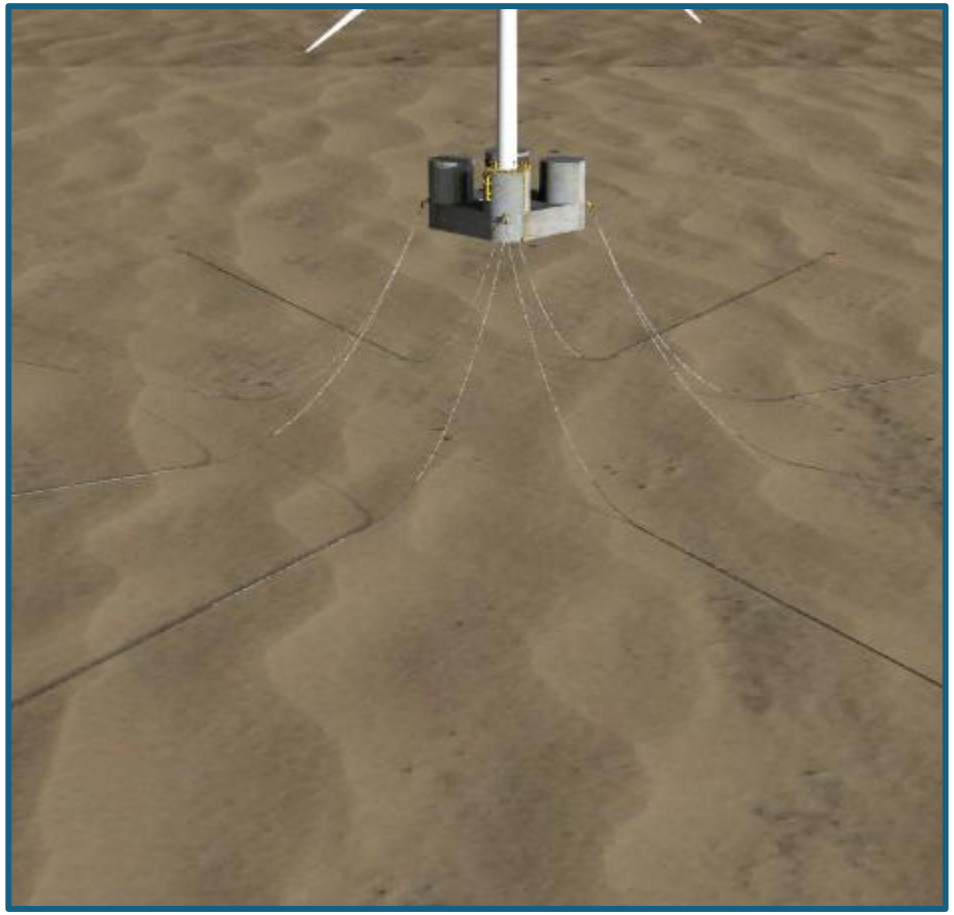
Selected option: Pazos de Borben



Concrete solution

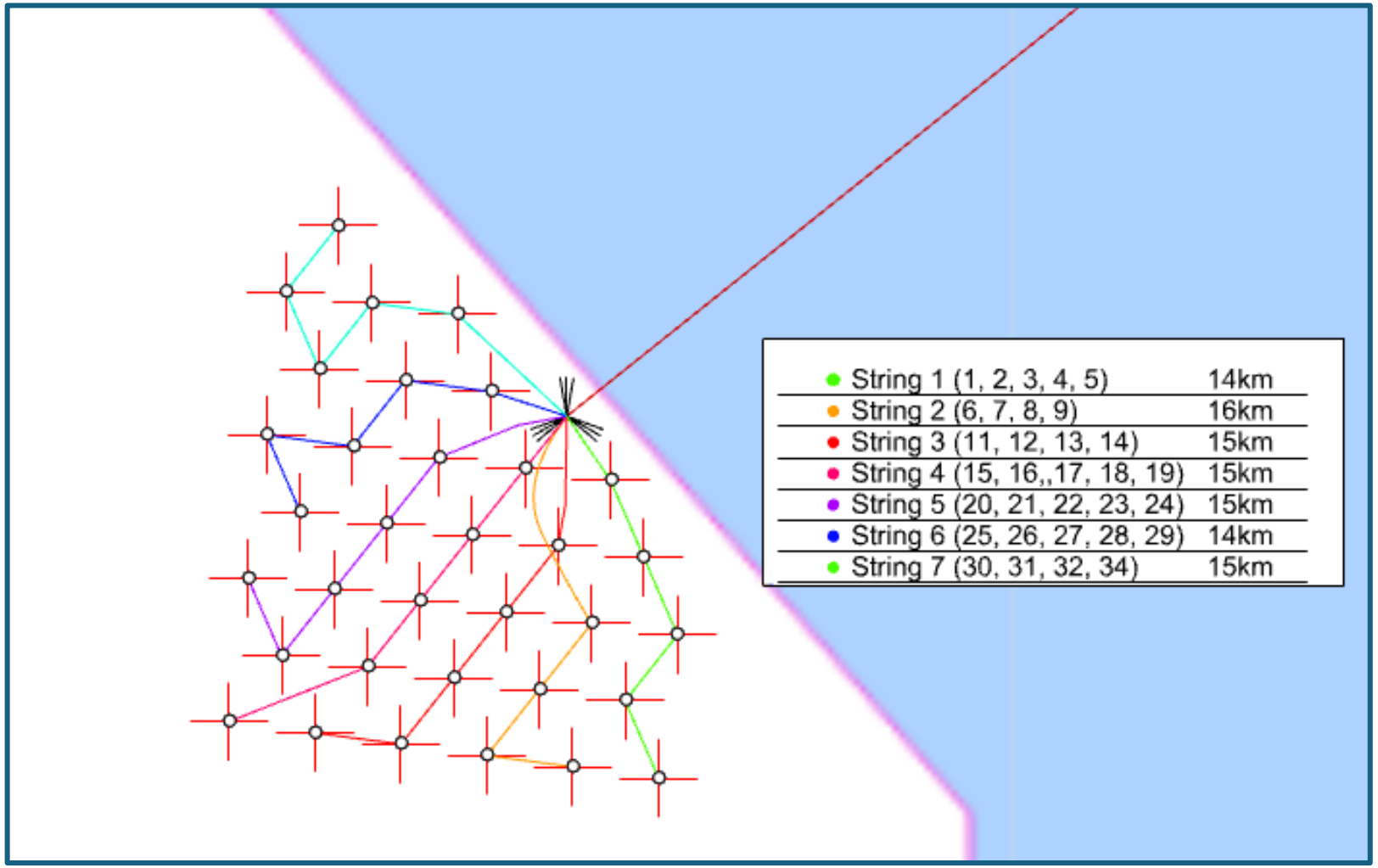
Platform, mooring, and construction

Platform type	Semisumersible
Platform	S-bos
Mooring system type	Catenary
Mooring characteristics	6-8 lines of chain with links of 140mm and 600-800m long. Footprint of radius ~400m
Construction port	Langosteira
WTG assembly port	Langosteira
OSS	Si
Network access point	El Sabon
Export cable	2 cables of 220 kV of 65 km length
Interarray cable	66kV cables in 6 lines of 5 WTG y 1 line of 4 WTG



Concrete solution

Farm layout



Steel solution

Platform, mooring, and construction

Platform type	Semisumersible
Platform	WindFloat
Mooring system type	Catenary
Mooring characteristics	6 lines of chain with links of 140mm and 600-800m long. Footprint of radius ~400m
Construction port	Navantia Ferrol-Fene
WTG assembly port	Puerto exterior de Ferrol
OSS	Si
Network access point	El Sabon
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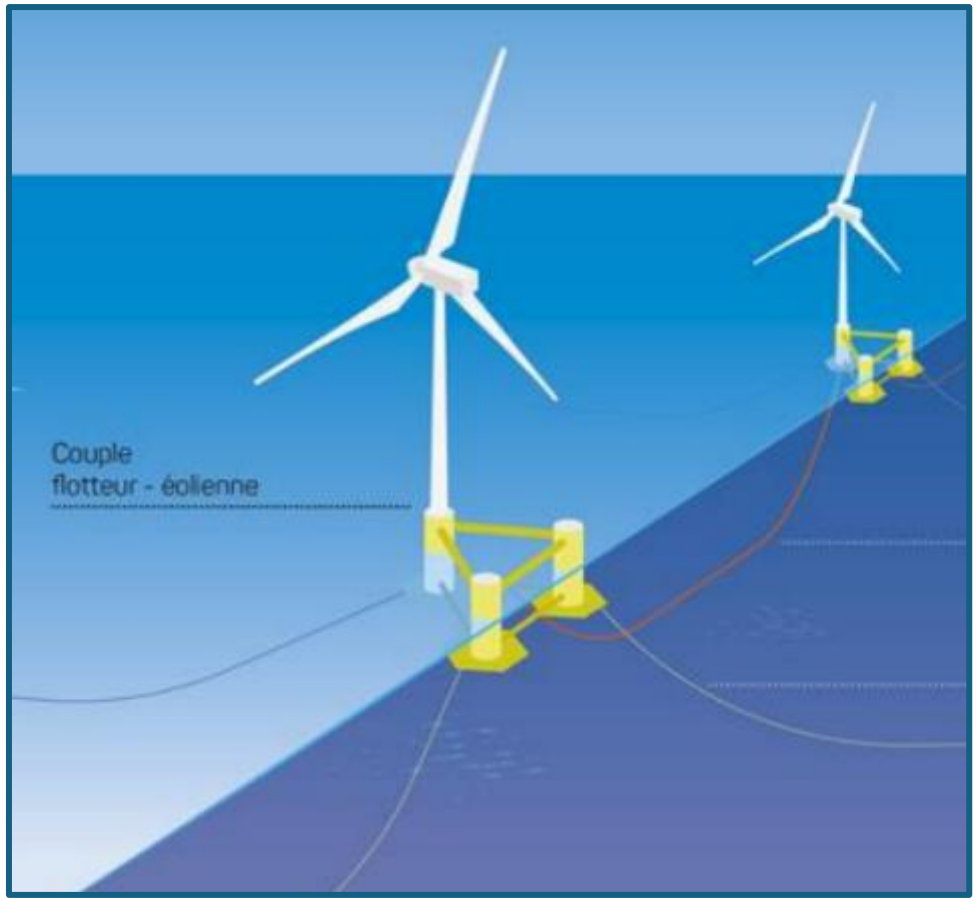
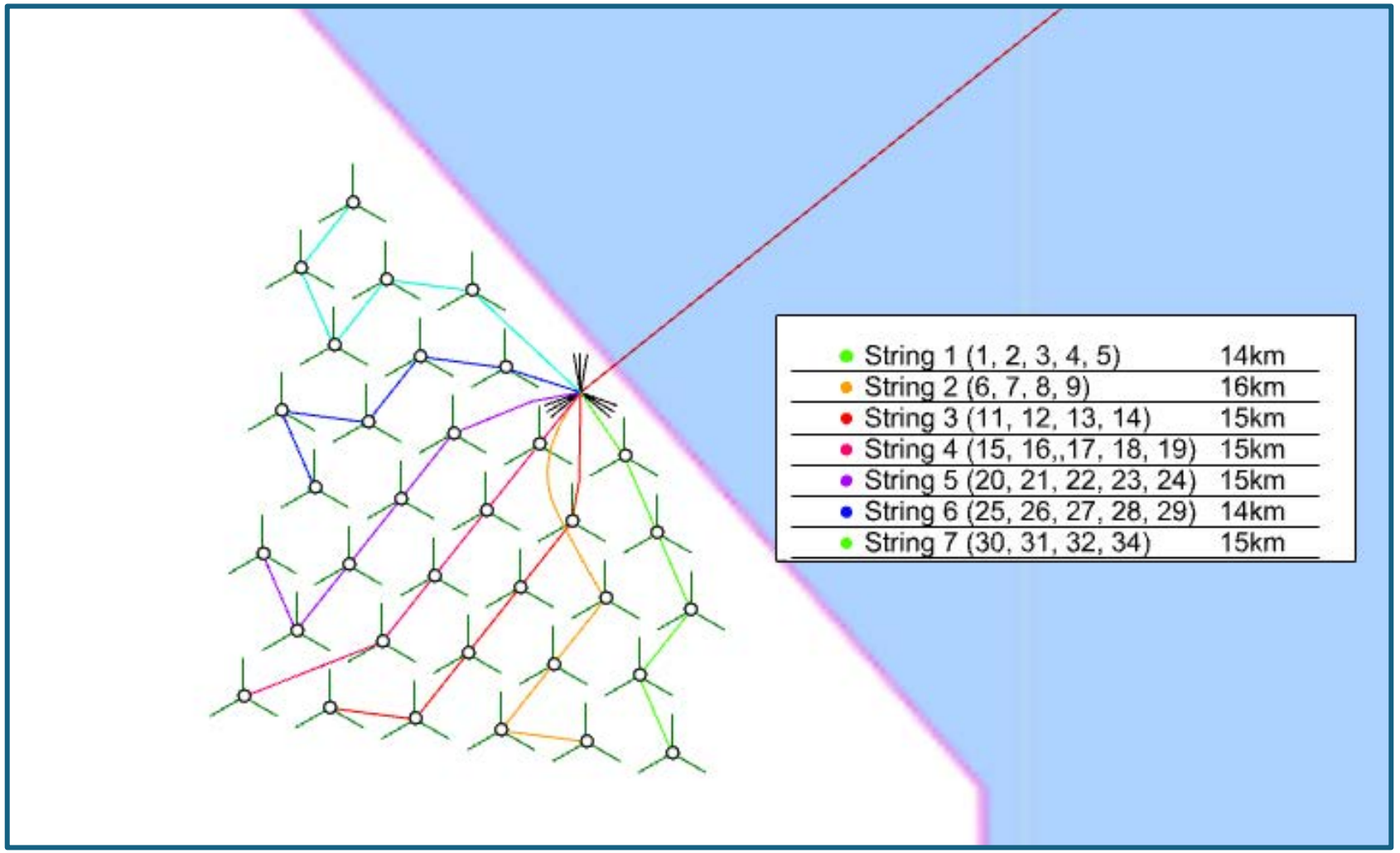
Interarray cable	66kV cables in 6 lines of 5 WTG y 1 line of 4 WTG



Steel solution

Farm layout



Annual Energy Production

Producción energética anual	Parque 510 MW
AEP 50% probabilidad de excedencia	1836 GWh
AEP 90% probabilidad de excedencia	1598 GWh

Courtesy of CBW – CAPITAL BLUEWIND by
BlueNewables and YouWind Renewables

Marine AREA: NOR4

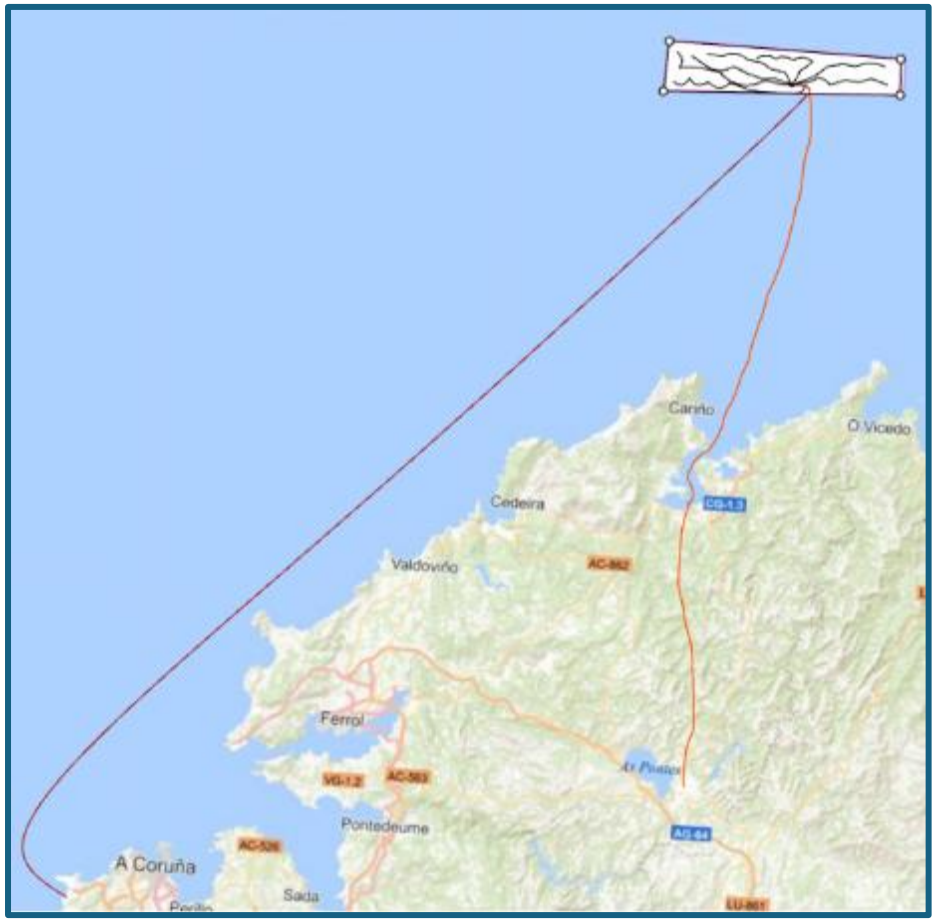
FARM SUMMARY

Blue development for the future energy

Network access points

Benchmarking of two solutions

Cost	Sabon	As Pontes
Offshore cable	501.600.000,00 €	168.960.000,00 €
Onshore cable with PHD (offshore-onshore transition)	1.000.000,00 €	1.000.000,00 €
Onshore cable (underground)	-	37.004.000,00 €
Onshore cable (aerial)	-	5.742.000,00 €
Environmental costs	471.000,00 €	356.000,00 €
Total	**503.071.000,00 €**	**213.062.000,00 €**



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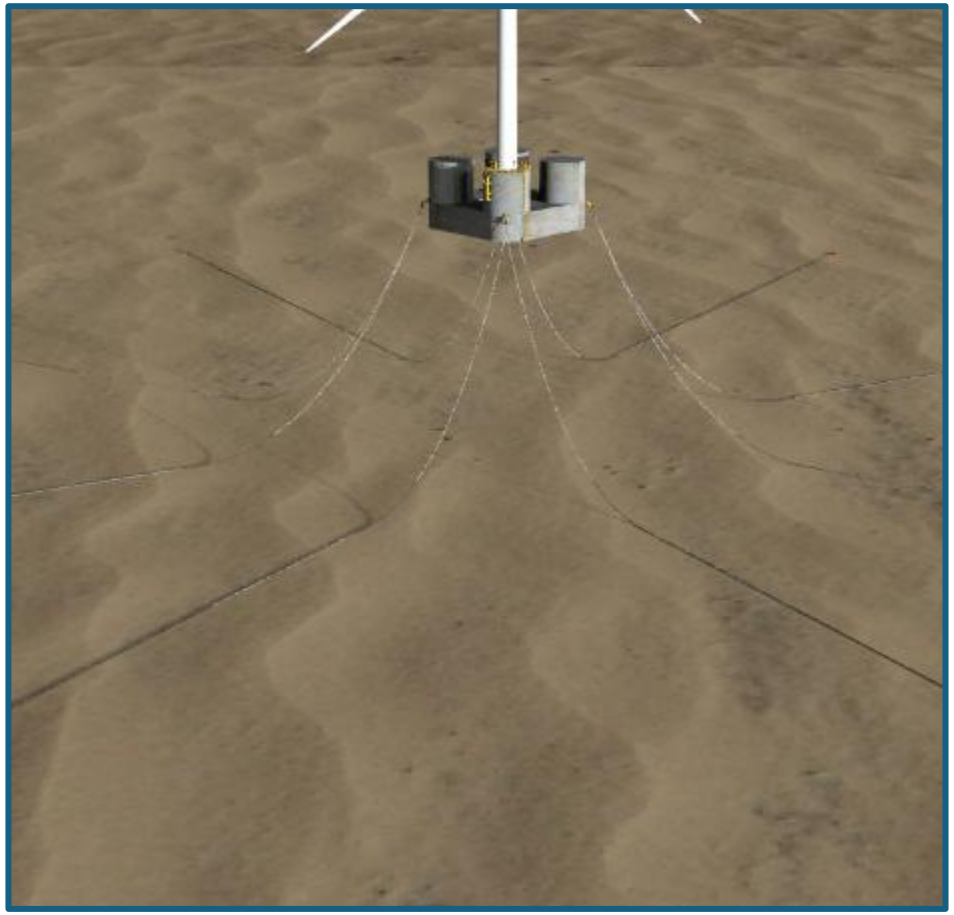
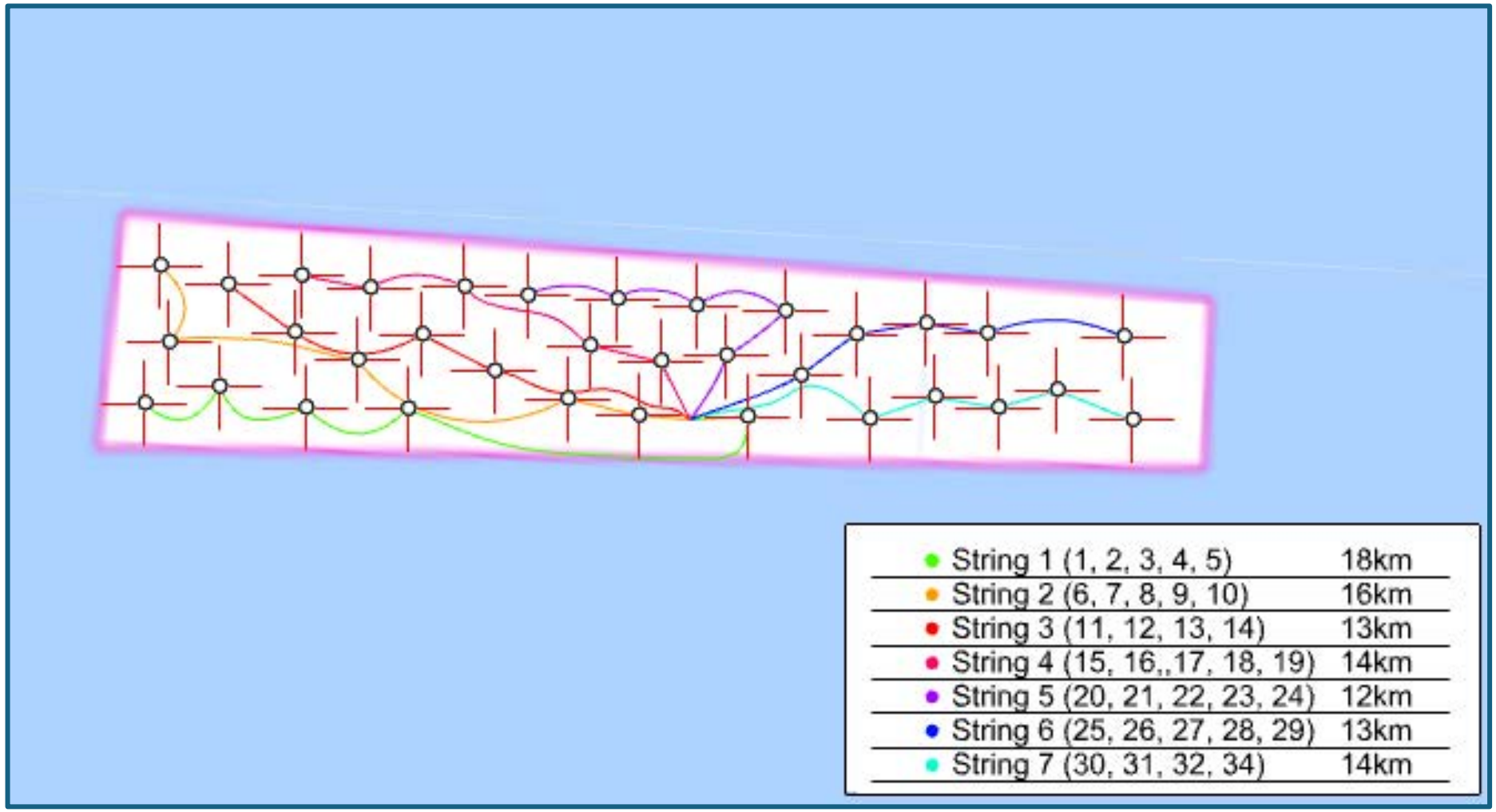
Construction port	Langosteira
WTG assembly port	Langosteira
OSS	Si
Network access point	El Sabon
Export cable	2 cables of 220 kV of 95 km length
Interarray cable	66kV cables in 6 lines of 5 WTG y 1 line of 4 WTG



Concrete solution

Farm layout



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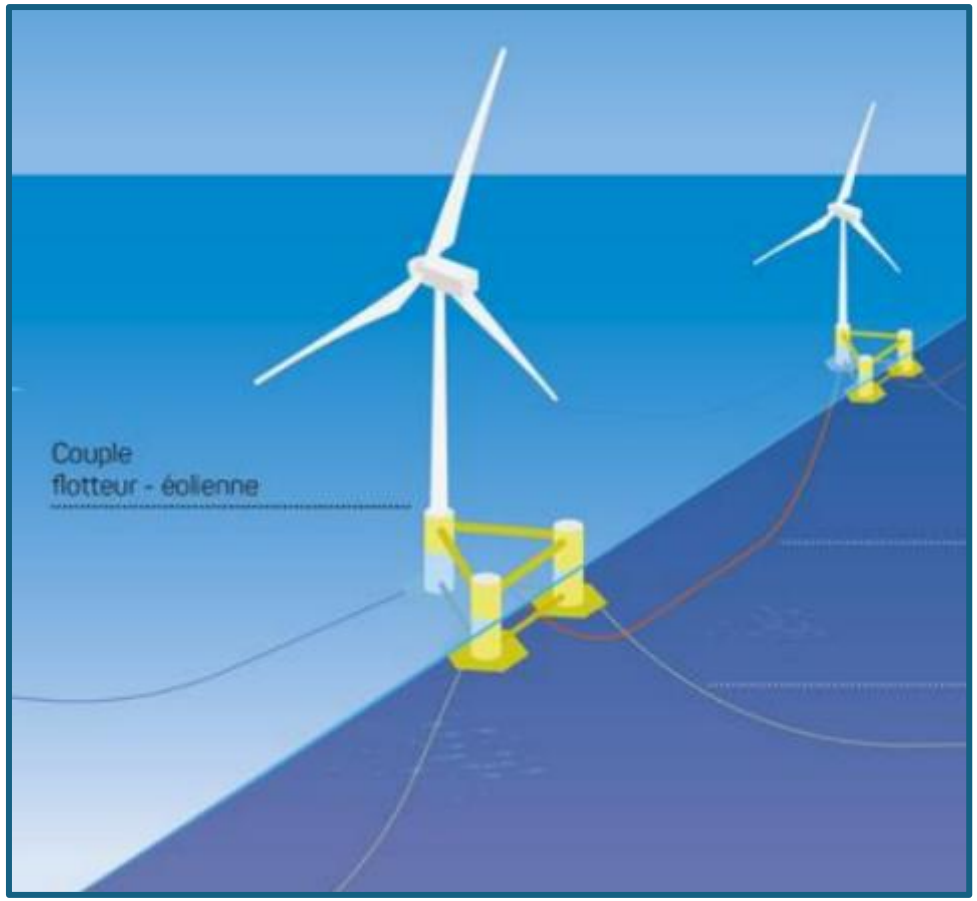
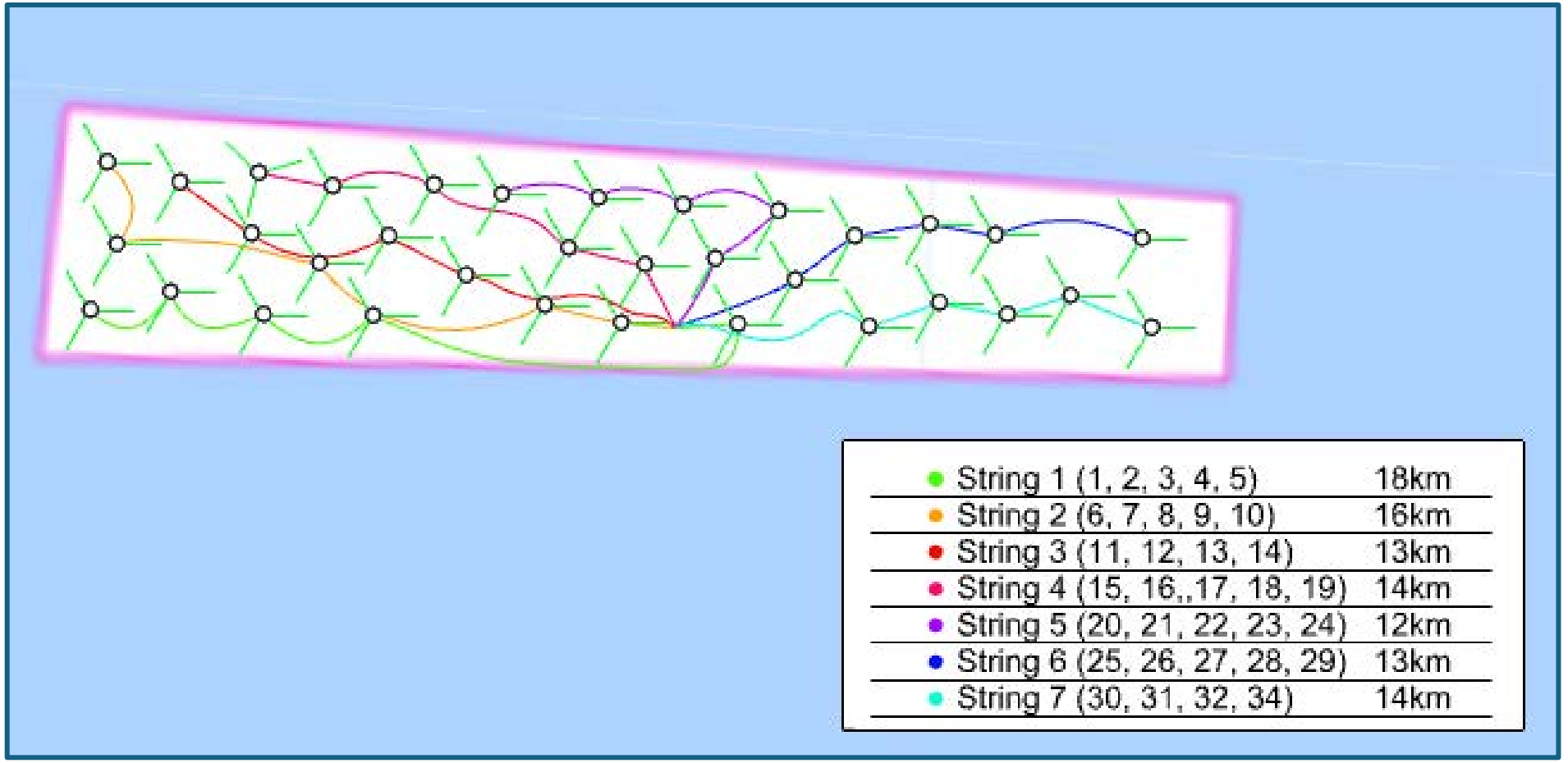


Steel solution

Farm layout



Annual Energy Production

Producción energética anual	Parque 510 MW	Subzona 45MW
AEP 50% probabilidad de excedencia	2075.3 GWh	183.4 GWh
AEP 90% probabilidad de excedencia	1805.5 GWh	160.5 GWh

Offshore Wind and Value Chain in Galicia

Oriol Sarmiento Díez - CLUERGAL

April 22, 2026

www.cluergal.org

CLUERGAL - Renewable Energy Cluster of Galicia

1. Founded in 2010
2. 125 members
3. Full value chain representation
4. All renewable technologies
5. Promotion of business cooperation
6. Sector visibility and advocacy
7. Events and specialized training

cluergal
clusterenerxíasrenovables degalicia

Companies in this meeting

Aeromedia	https://aeromedia.es/en/	leading drone (RPAS) services company, made up of a team of specialized engineers with extensive experience in sectors such as aeronautics, industry, surveying, forestry and emergencies.
Fe Energy	https://fe.energy/	company specialized in the development of sustainable energy generation projects
PTM	https://www.ptmar.com/en/	shipping agents, stevedores, storage, chartering agents, custom agent, combined and multimodal transport
BlueNewables	https://bluenewables.com/	Engineering consultancy at the cutting edge of the innovation within the blue economy. We support the marine renewables energy sector with technical know-how, advice and holistic approach
COVERWIND	https://coverwind.es/en/home-2/	Project Management, Supervision and Inspection, Assembly, operation and maintenance
GHENOVA	https://ghenova.com/en/	engineering company that works both nationally and internationally offering multidisciplinary engineering and consulting services.
Acebron Group	https://acebrongroup.com/en/	Machining, Surface Treatment, Welding and Metal Sheet Working
Green Hat Consulting	https://greenhatconsulting.net/en/home/	Development of renewable energy projects. Wind Consultancy
Grupo Intaf	https://grupointaf.es/en/	Metal-mechanical Services. Engineerieng. Manufacturing. Maintenance.
Arba	https://arba.energy/index.php?lang=en	Origination. Development. Financing. Construction. Commercial Operations
GANAIN	https://www.ganain.es/	CONSTRUCTION OF OFFSHORE WIND STRUCTURES Structures for offshore wind, primary steel, secondary steel, knots, boat landings.

ONSHORE WIND ENERGY

- Spain: 13 GW (2021) a 37 GW (2030)
- Galicia 4 GW - 300 MW (2020-2025)
- Repowering
- Administrative permiting
- Social acceptance
- Supply Chain

OFFSHORE VALUE CHAIN DEVELOPMENT

VESSELS | SHIPYARDS | PORTS

COMPONENTS | EQUIPMENTS | LOGISTICS

ENGINEERING | ASSEMBLY | INSTALLATION

OPERATION & MAINTENANCE

ECONOMIC IMPACT

EMPLOYMENT

KEY TAKEAWAYS

Strategic focus on offshore wind

Strong environmental commitment

Need for social consensus (fish sector)

Industrial development and local value chain

Boosting engineering, innovation and technological centres

THANK YOU FOR YOUR ATTENTION

Oriol Sarmiento - Cluergal

oriolsarmiento@cluergal.org

https://www.linkedin.com/in/oriolsarmiento/

marine renewables canada

Sector Overview: Offshore Wind in Canada

WindEurope 2026

About Marine Renewables Canada

Who we are

National industry association for offshore wind, tidal, wave, and river current energy

200+ members (technology and project developers, utilities, supply chain, researchers, Indigenous organizations, municipalities)

Our Mission: To champion Canada's growing marine renewable energy sector through advocacy, engagement, and education and expand market opportunities across the country and globally.

What we do

- **Advocacy:** Support sector growth through policy development and advocating for enabling measures
- **Supply chain development:** Support supply chain development by facilitating collaboration and connections amongst industry, suppliers, and communities
- **Education & engagement:** Share information, educate, and engage
- **International business development:** Provide market intelligence, lead international business development activities, and facilitate investment attraction

Snapshot | Marine Renewable Energy Activity in Canada

Offshore Wind
- BC Call for Power

Tidal Energy Projects (British Columbia)
- Yourbrook Tidal Energy – 500 kW
- Blind Channel Test Centre

Wave Energy
- Mowachaht-Muchalaht First Nation wave energy project

Pacific Regional Institute for Marine Energy Discovery

River Current
- Canadian Hydrokinetic Turbine Test Centre (CHTTC)
- ORPC Canada

Offshore Wind
- 5 GW target - Nova Scotia

Tidal Energy Projects (Nova Scotia)
- Fundy Ocean Research Centre for Energy (FORCE)
- New Energy Corporation – 800 kW
- Nova Innovation – 1.5 MW
- Orbital Marine Power - 12.5 MW

Drivers for Offshore Wind in Canada

Clean electricity demand

- 2-3 x more needed by 2050
- Renewable electricity targets
- Electrification of the economy; clean fuels

Energy security & resiliency

- Domestic renewable energy resources to support needs and protect against volatility
- Contribute to global needs (ex. green hydrogen and ammonia export)

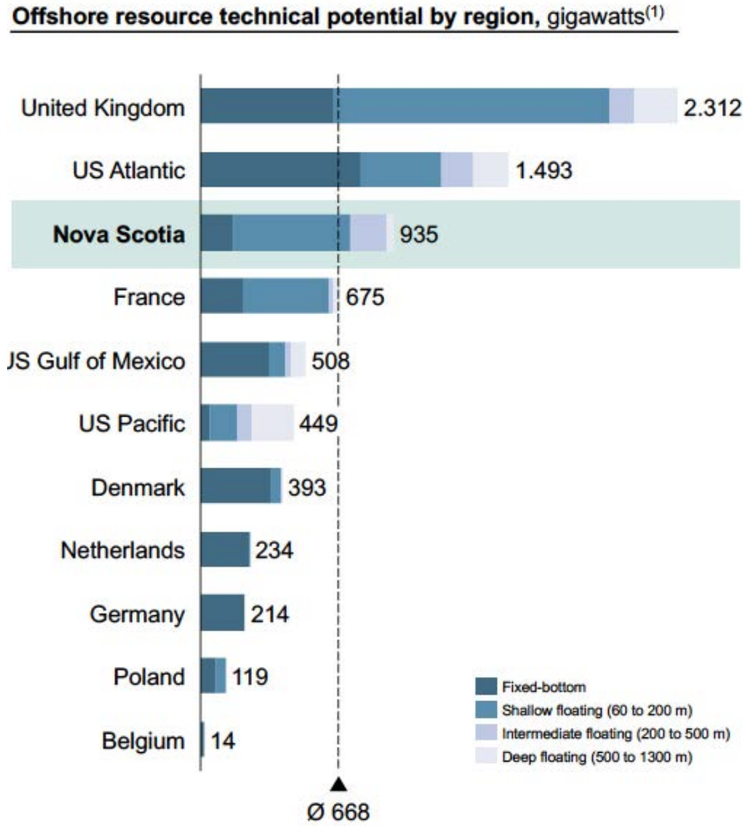
Economic opportunity

- Development requires skilled workforce
- Existing offshore and marine expertise, experience, and infrastructure

Atlantic Canada | Offshore Wind Potential

Atlantic Canada has some of the best untapped offshore wind resources in the world

- Nova Scotia has wind speeds of 10-11 m/s (rivalling those of the North Sea)
- Suitable seabed and capacity for both fixed and floating technologies



Progress | Offshore Wind in Nova Scotia

Ongoing

Early and Ongoing Engagement

Fisheries, Indigenous groups, local communities

Ongoing

Supply Chain Development

Workshops, trade missions, webinars

Ongoing

Research

Supply chain, market development, grid integration, ports, co-existence with other users, etc.

2022

5 GW Target (Nova Scotia)

2023-2025

Regional Assessment of Offshore Wind for NS and NL

2023

Nova Scotia Offshore Wind Roadmap

2023-2025

Regulatory Framework & Regulator

Accord Acts amended, Offshore Renewable Energy Regulations, Canada-Nova Scotia Offshore Energy Regulator

2025

Nova Scotia Wind Energy Areas Designated

2025-2026

Call for Bids/Land Tenure Process

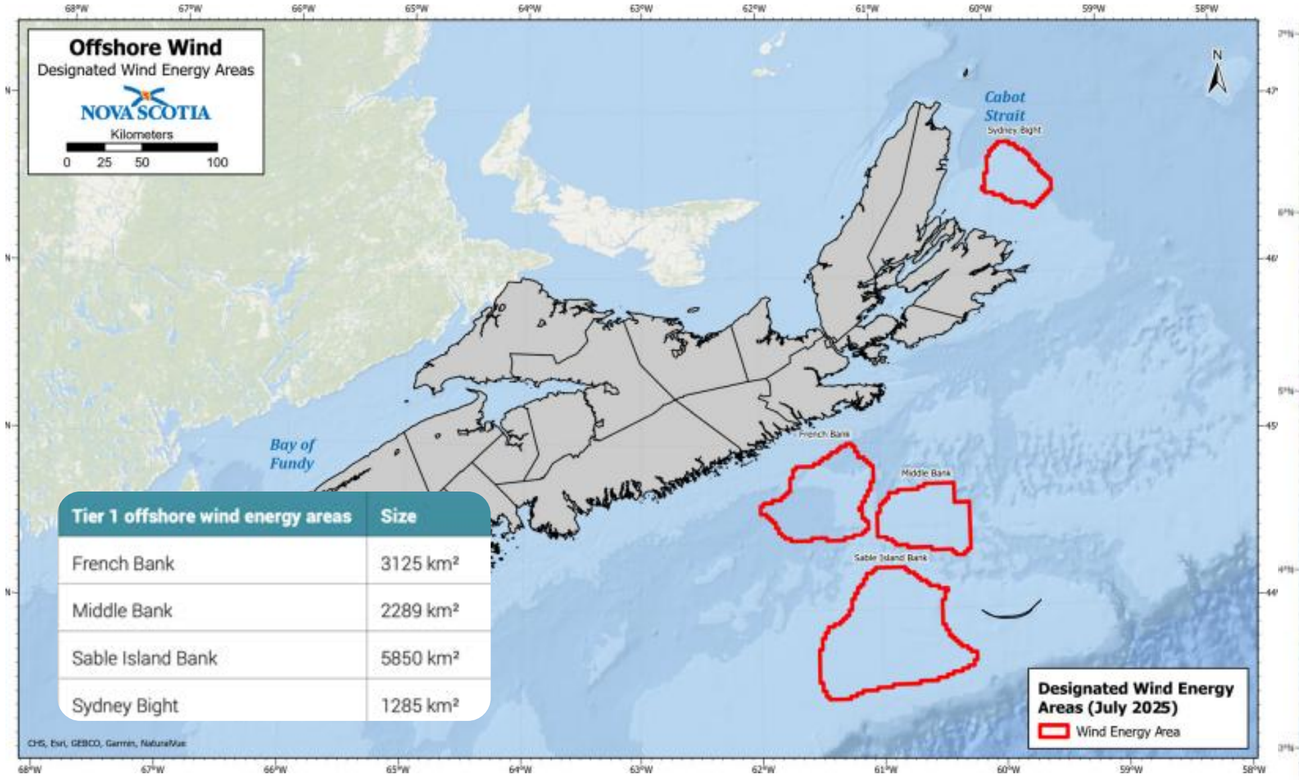
Process started via Strategic Direction Letter, Call for Information and Prequalification; led by CNSOER

Supportive Policy Landscape

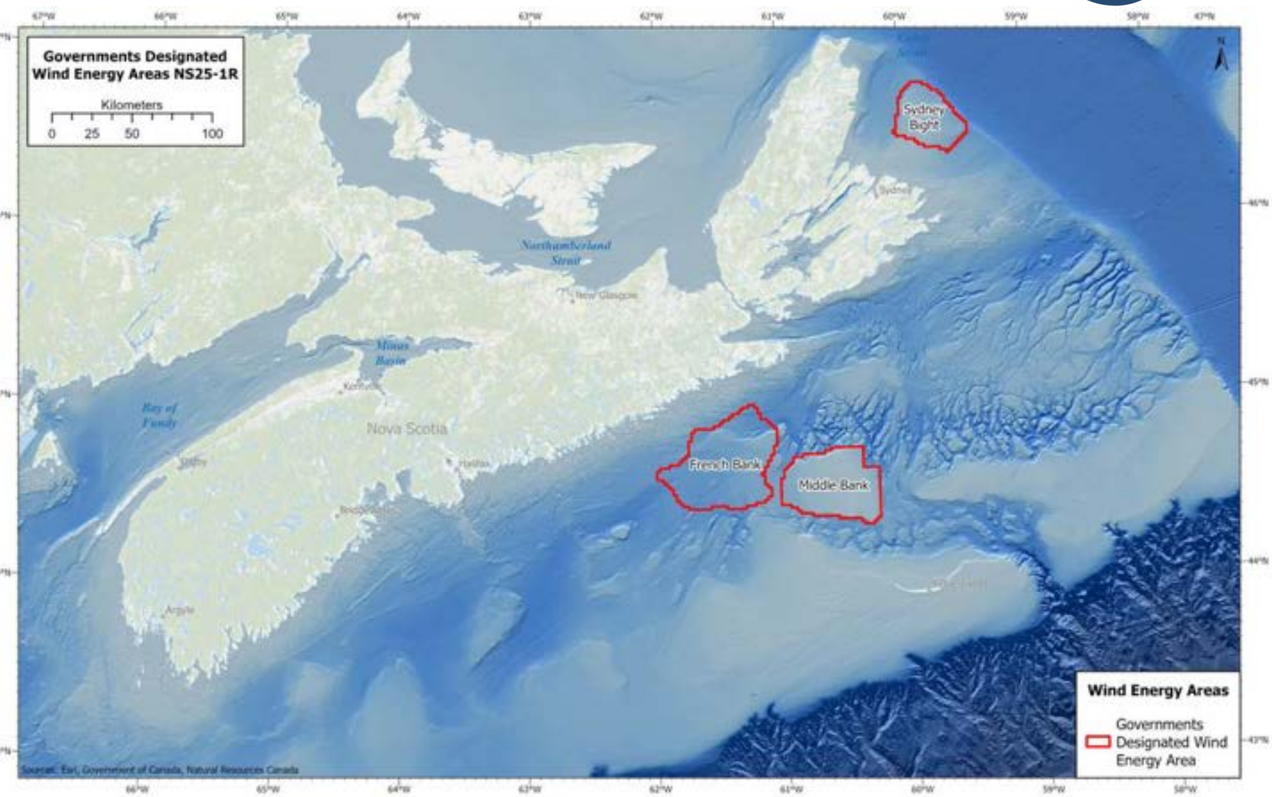
Key policies and legislation have been established in recent years that are positive for offshore wind development.

Amendments to the Accord Acts	Establish regulatory framework and regulator for offshore renewables; supports land tenure process
Clean Economy Investment Tax Credits	Vital in offsetting high upfront capital costs of marine renewables and attracting investment
Major Projects Office	Could support streamlined permitting for large-scale projects like offshore wind and transmission
Various policies/ legislation in Nova Scotia	5 GW offshore wind leasing by 2030, Roadmap, legislative changes, Wind West proposal supporting offshore wind development

Progress | Wind Energy Areas



Tier 1 offshore wind energy areas	Size
French Bank	3125 km²
Middle Bank	2289 km²
Sable Island Bank	5850 km²
Sydney Bight	1285 km²



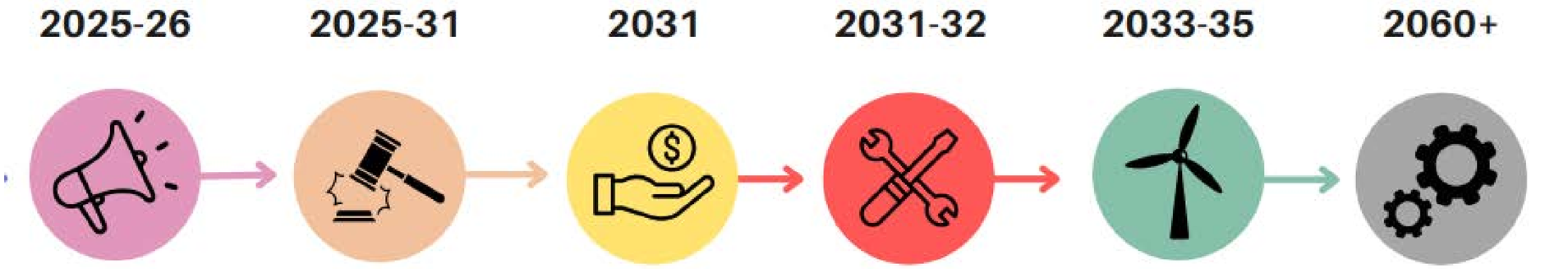
Wind Energy Areas

- **4 areas** designated summer 2025: Emerald Bank, Sable Island Bank, Sydney Bight, Middle Bank, French Bank
- Up to **60+ GW** capacity

First Call for Bids in 2026

- Strategic Direction to CNSOER targeting **3-5 GW**
- 3 Wind Energy Areas: **Sydney Bight, Middle Bank,& French Bank**
- Process underway, beginning with Call for Information and Prequalification

Timeline | First Call for Bids



2025-26 — Call for Bids and Licensing

CNSOER issues Call for Bids

CNSOER issues Submerged Land License

2025-31 — Assessments and Authorizations

Developer conducts site characterization

Environmental Impact Statement

Federal Impact Assessment

CNSOER issues Authorization to Construct and Operate

2031 — Financing

Developer secures funding for project development

2031-32 — Construction

Developer undertakes project construction activities

2033-35 — Operations Initiate

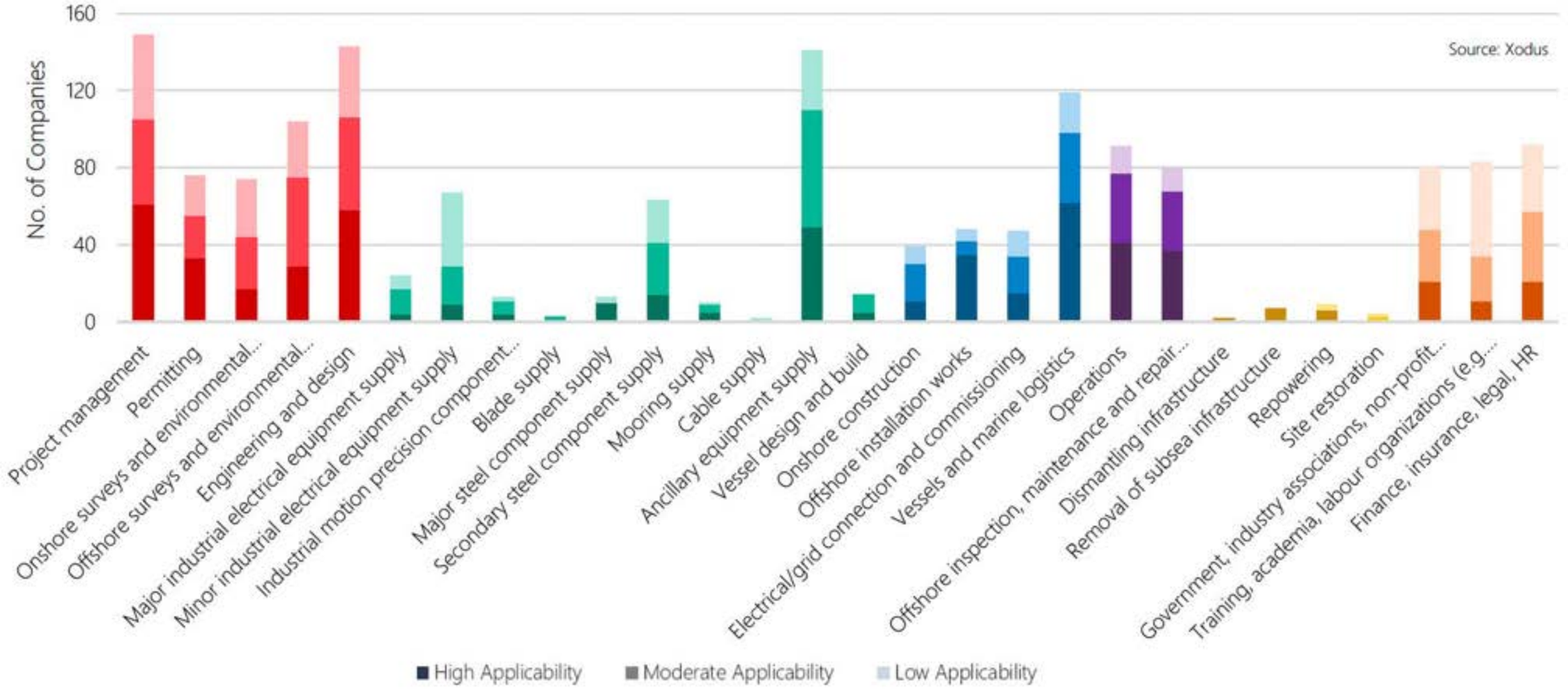
Projects are operational for 25-35+ years

CNSOER enforces safety and compliance

2060+ — Decommissioning and Repowering

CNSOER issues Authorization to Decommission

Leveraging Supply Chain Strengths



~60% of businesses surveyed have **high or moderate applicability** with direct experience and relevant products/services for offshore wind development

Strengths: project development, ancillary equipment supply, vessels and marine logistics, offshore installation and maintenance

New jobs: 6,000 jobs at peak times if 7.5 GW by 2050

Canadian Ports Supporting the Industry

- US offshore wind market already putting Canadian ports to work
  - Port of Argentia, Port of Sheet Harbour, Woodside, Atlantic Canada Bulk Terminal, Port of Sydney
- Experience to date can be leveraged to support Canadian projects

Port of Argentia

Atlantic Canada Bulk Terminal

Port of Sydney

Port of Sheet Harbour

marine renewables canada

Marine Renewable Energy Supply Chain Database

Featuring Canadian capabilities in

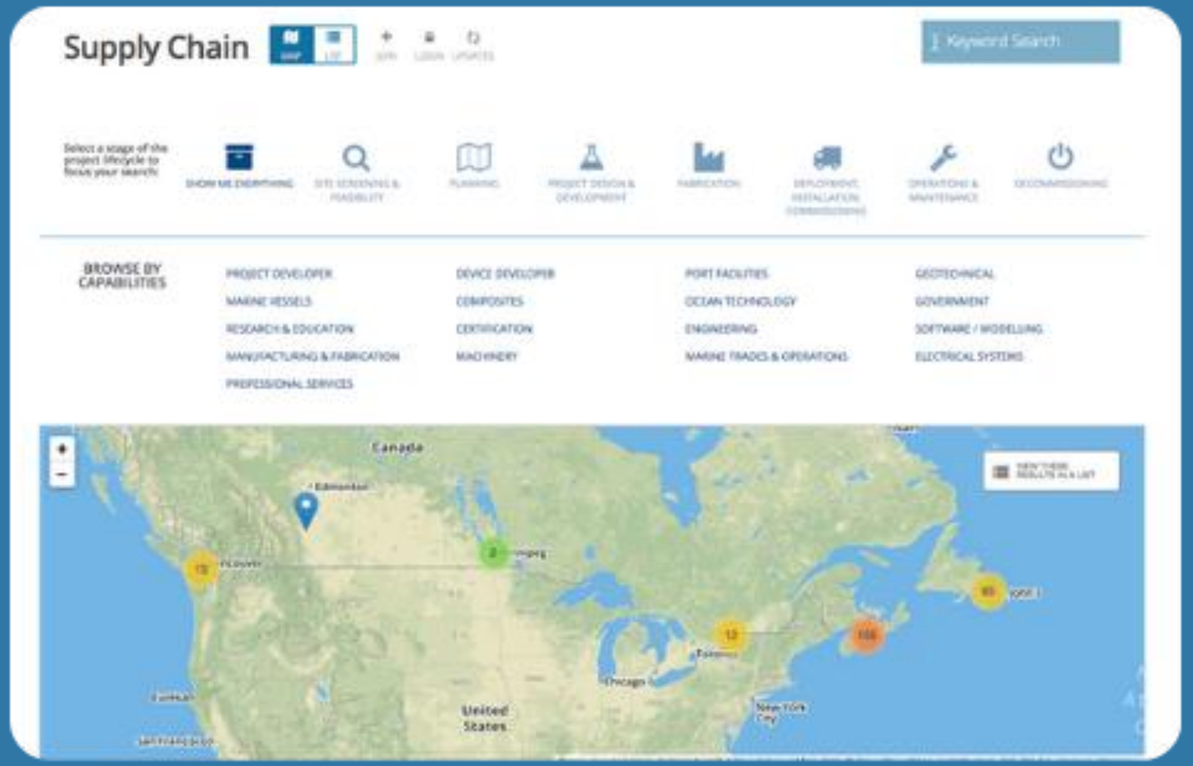
Tidal energy

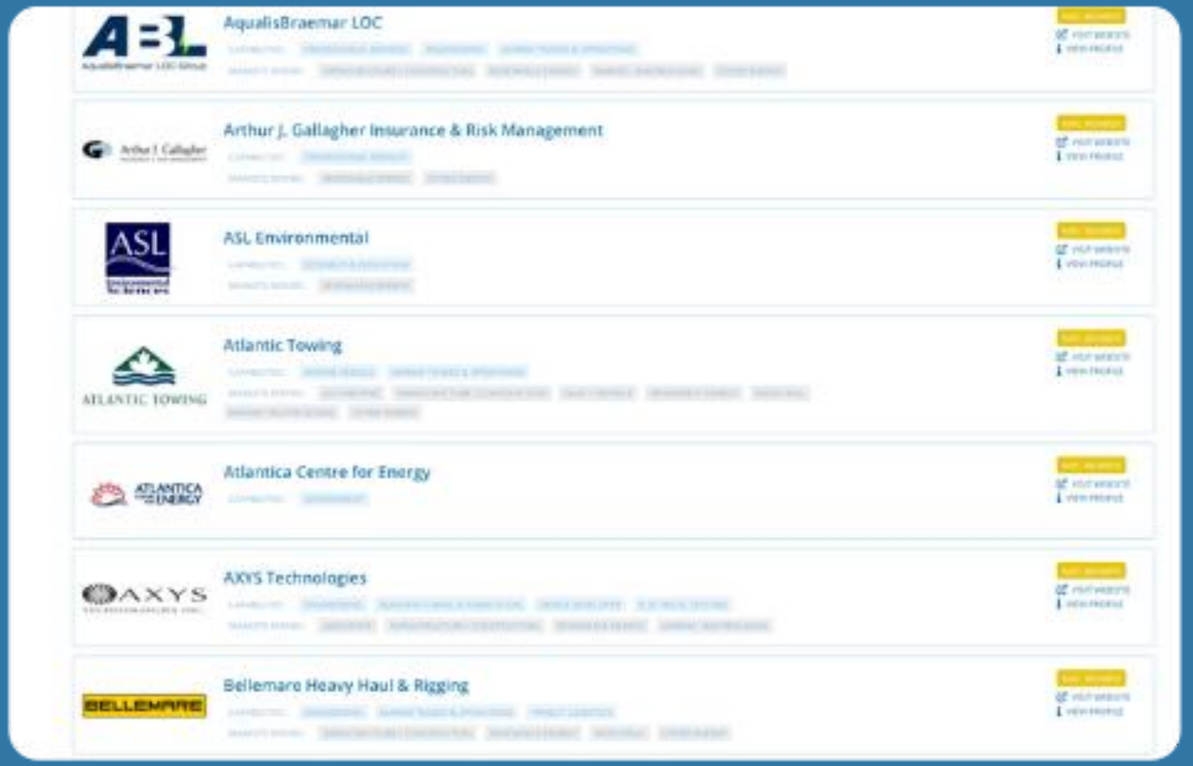
Offshore wind

Wave energy

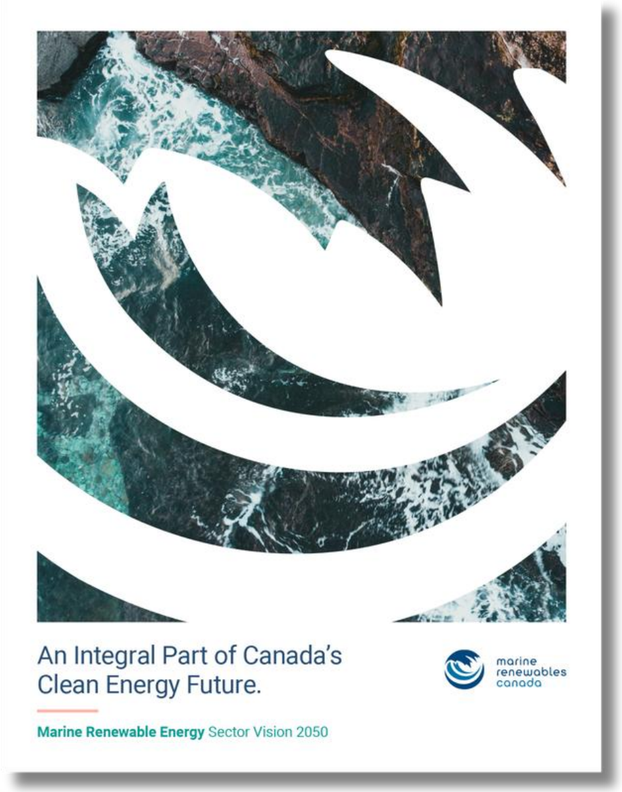
River current energy

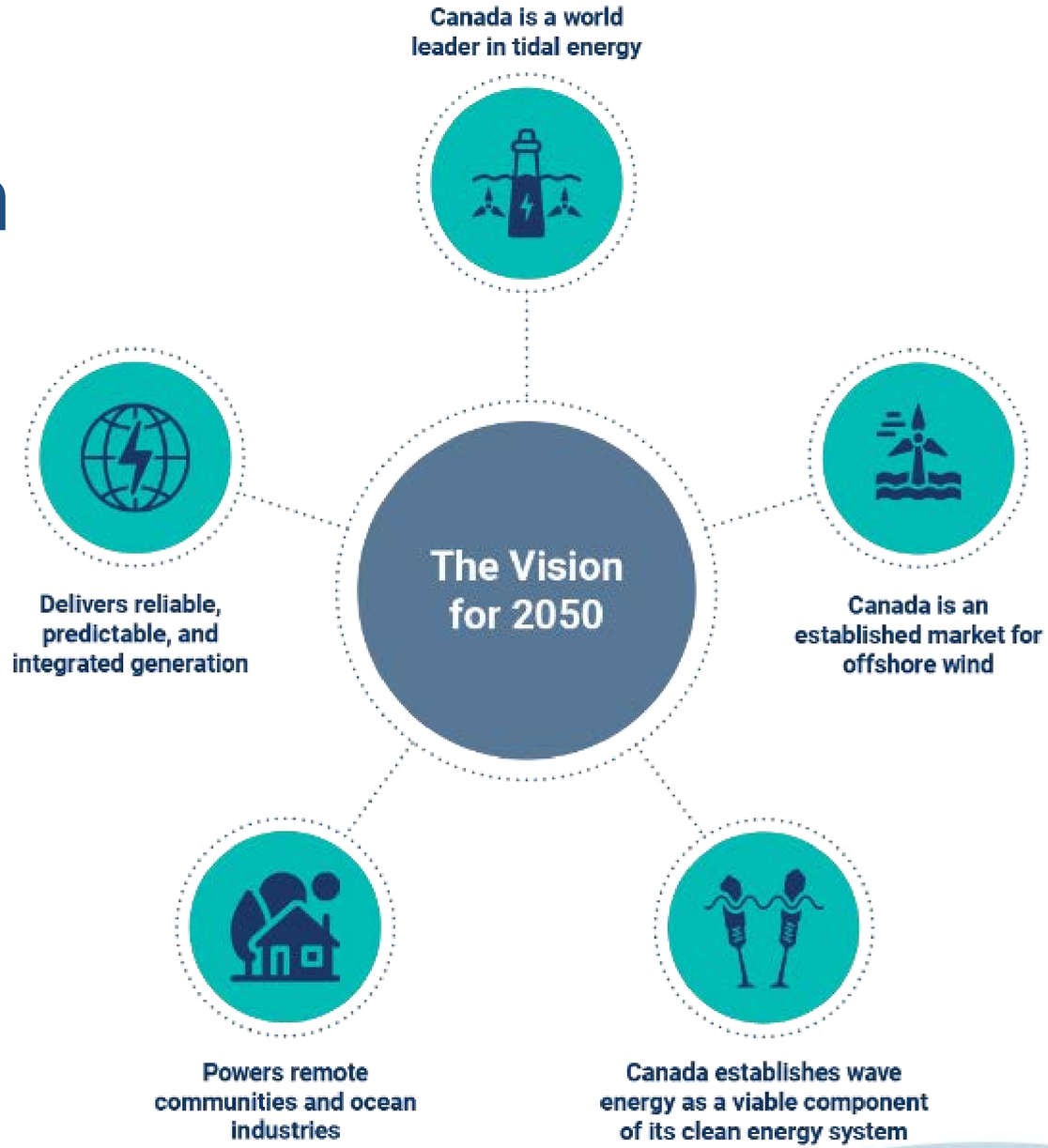
Find a partner or sign up for a profile: www.supplychain.marinerenewables.ca





Marine Renewable Energy Sector Vison 2050





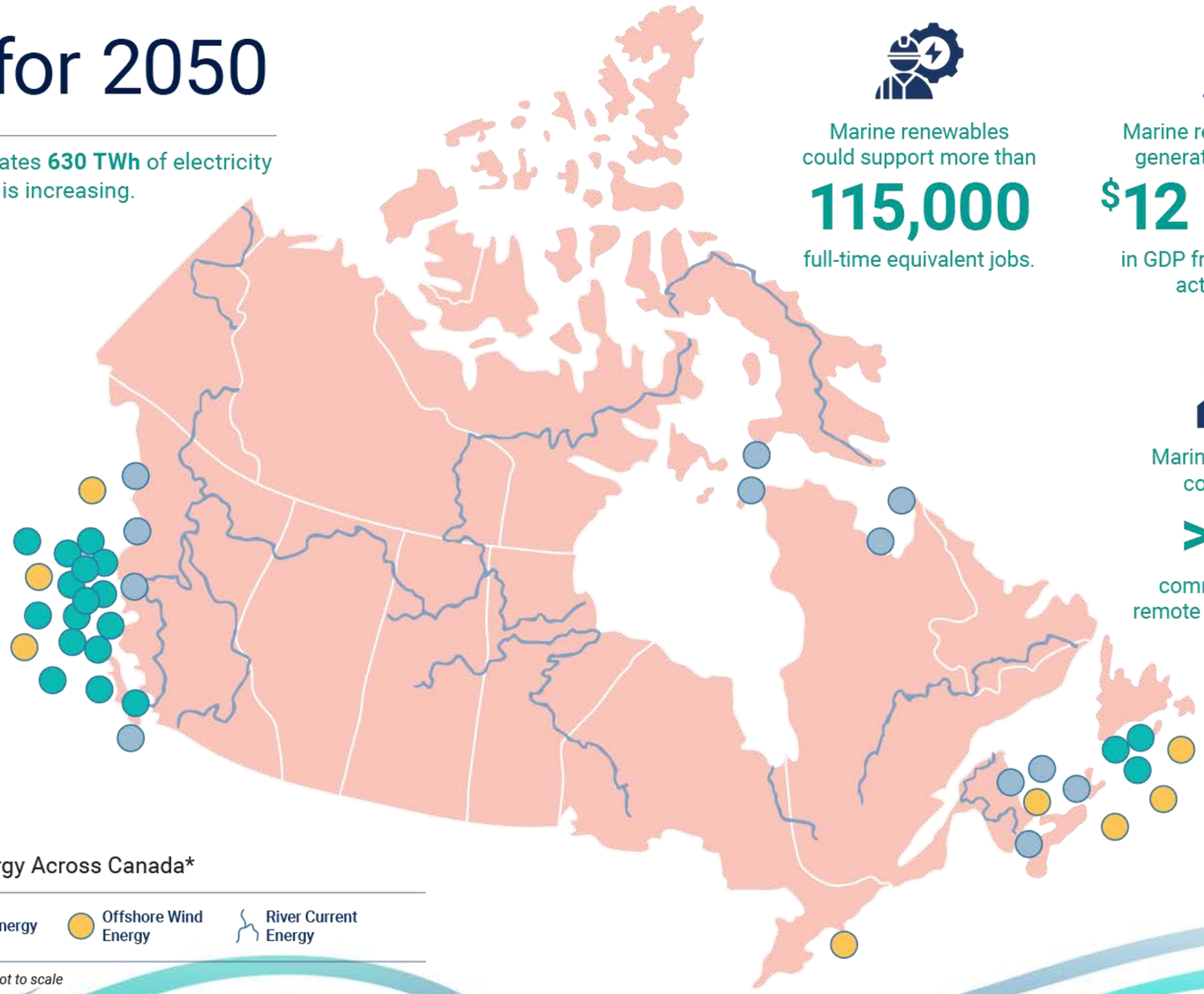
Marine Renewable Energy Sector Vison 2025

Vision for 2050

Canada currently generates **630 TWh** of electricity each year, and demand is increasing.

Offshore wind:
32 GW

Tidal Energy:
1 GW



Marine renewables could support more than

115,000

full-time equivalent jobs.

Marine renewables could generate an estimated

$12 Billion

in GDP from construction activity alone.

Marine renewables could power

> 50

communities and remote industrial sites.

Marine Renewable Energy Across Canada*

Wave Energy | Tidal Energy | Offshore Wind Energy | River Current Energy

** For illustrative purposes only, areas not to scale*


marine
renewables
canada
Marine Renewables Canada
2026 Conference & Exhibition:
Powering Canada's Clean Energy Future
OTTAWA,
ONTARIO
THE WESTIN OTTAWA
NOVEMBER
17-19, 2026
marinerenewablesconference.ca

Thank you

Get in touch

www.marinerenewables.ca

NIMO Presentation to Canadian Delegation at Wind Europe

Kerry Muldoon
21 April 2026

Northern Ireland Maritime & Offshore

www.nimaritime.com

What is NIMO?

NIMO Background

- Emerging Cluster (from April 2023)
- Official launch in 2024
- Funded by Invest NI and DfT
- Value is through shared knowledge and learning
- Driving innovation, sustainability & economic growth
- Key principles are inclusivity, transparency, proactive engagement & benefit for all

NIMO Members

- C. 60 members
- SME Led
- Triple Helix model
- Organic growth
- Government engagement
- Wide range of expertise and specialisms

NIMO Priorities

Mission: To connect and elevate the Maritime and Offshore sectors in Northern Ireland, fostering collaboration, innovation, and sustainable economic growth for members across the sectors and with partners across the globe.

- Want to be recognised as a top cluster internationally
- Commercially focused – driving revenue & growth for NI
- Seen a trusted partner to government & key decision makers

Realising Opportunities

- Promotion of the local supply chain
- Bringing opportunities to SMEs
- Market entry – NI, UK, EU, etc.
- Voice for the supply chain

Key Projects

- FSS / Shipbuilding
- ORE / Belfast Harbour
- Consortia building for the future

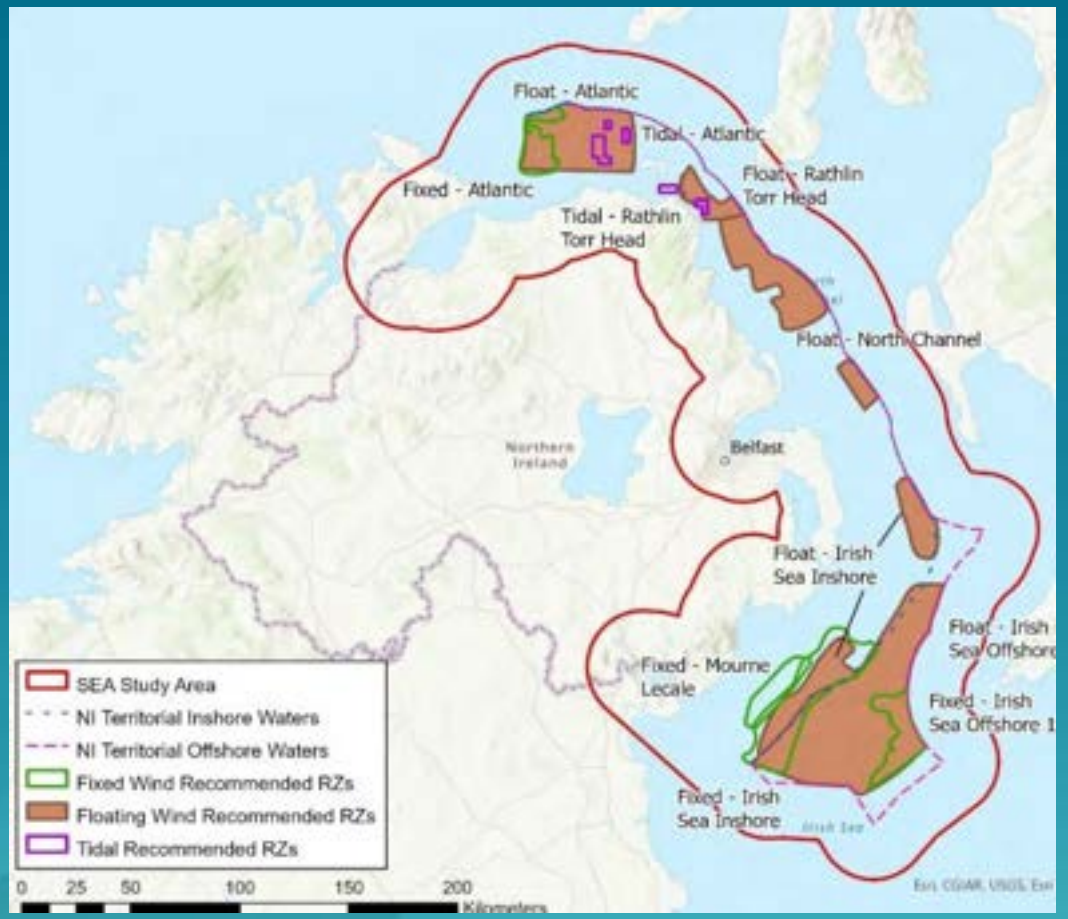
Enabling Activities

- Member upskilling & knowledge
- Skills & Training
- Inclusive employment pathways

NI Policy Landscape

NI Policy Context for ORE

- Draft Offshore Renewable Energy Action Plan published in 2022, updated in 2025 along with SEA & HRA
- Maintains a 'target' of **at least 1GW** from 2030
- Includes maps of ‘recommended’ and ‘refined’ areas in NI waters
- Designating environmentally viable marine zones – ‘investment ready’
- Underpinning legislation & policy needed for the leasing round to be progressed
- Progressing underpinning legislation & working with The Crown Estate – future leasing round from 2028



Renewable Energy Support Scheme

- Final Design of the Renewable Electricity Price Guarantee Scheme published Sept 2025, competitive CfD style divided into 3 pots:
  - Pots 1 & 2: Onshore wind & solar (not offshore)
  - Pot 3: Offshore wind
- First auction (pots 1 & 2) scheduled for early 2027
- No date for Offshore Wind (Pot 3)
- Auctions every 1 – 2 years
- Contract term = 15 years, pay as clear rather than pay as bid

Northern Ireland / Atlantic Canada Opportunity

Belfast Harbour

Supply Chain Opportunity

- Local content will be a priority for all countries
- Best opportunity is to work in partnership with local company
- Unlock opportunities wider than NI / Canada
- Currently undertaking a study with AIA to understand areas of synergy
- Possible reciprocal visits in 2026/2027 to explore the opportunity

D1 Logistics Facility, Belfast Harbour

Areas of Opportunity

Naval Architecture & Defence

Shipbuilding

Subsea Security

Navantia / H&W making significant investment - FSS

Wave & Tidal

Significant potential

Demonstration projects – Strangford & Bay of Fundy

Relevant expertise

Innovation

Demand for new solutions

Academia - QUB, Dalhousie

Innovative Facilities – COVE, Digital Catapult, AMIC

Fishing & Aquaculture

Critical industry facing challenges

Sharing space

Sea Source Offshore is a good case study

Offshore Wind Opportunities

- Canada & NI on similar(ish) timelines
- Companies with significant global experience in ORE, including HV & grid
- Both electrical islands with need for infrastructure
- Complimentary expertise
- Report exploring opportunities – available soon

Northern Ireland Maritime & Offshore

Thank you

Dr Kerry Muldoon
Executive Director, NIMO

Call: +44 7514 779920
Email: Kerry@nimaritime.com
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101 Airport Road West,
Belfast, BT3 9ED,
Northern Ireland

Polish Wind Market

Dominika Taranko, Managing Director and Vice President,
Wind Industry Hub Foundation

Warsaw, 22/04/2026

WIND INDUSTRY HUB (PWEA Group)

- **The Polish Wind Energy Association** (PWEA) is a non-governmental organisation established in 1999.

- PWEA is **the largest wind industry organisation** in Poland.

- ✓ Offshore and onshore wind energy **working groups**
- ✓ Platform for business cooperation
- ✓ **Partner for Parliament and Government** in developing stable legal framework
- ✓ **Annual onshore and offshore wind energy conferences**
- ✓ Wind sector **workshops** for specialists (also with the government)
- ✓ Mapping of the local supply chain in Poland
- ✓ Organization of participation in international fairs and study visits
- ✓ Key sector reports

Schedule of key PWEA events for this year:

PWEA 2026 Forum– March 2–3, 2026, Sopot
2nd Szczecin Climate Run – March 21, 2026, Szczecin
PWEA2026 Conference **– June 8–10, 2026, Świnoujście**
RE-Source Poland 2026 Conference – September 15–16, 2026, Warsaw
Offshore Wind Poland 2026 – November 17–18, 2026, Warsaw
22 nd Wind Energy Forum – December 1, 2026, Warsaw

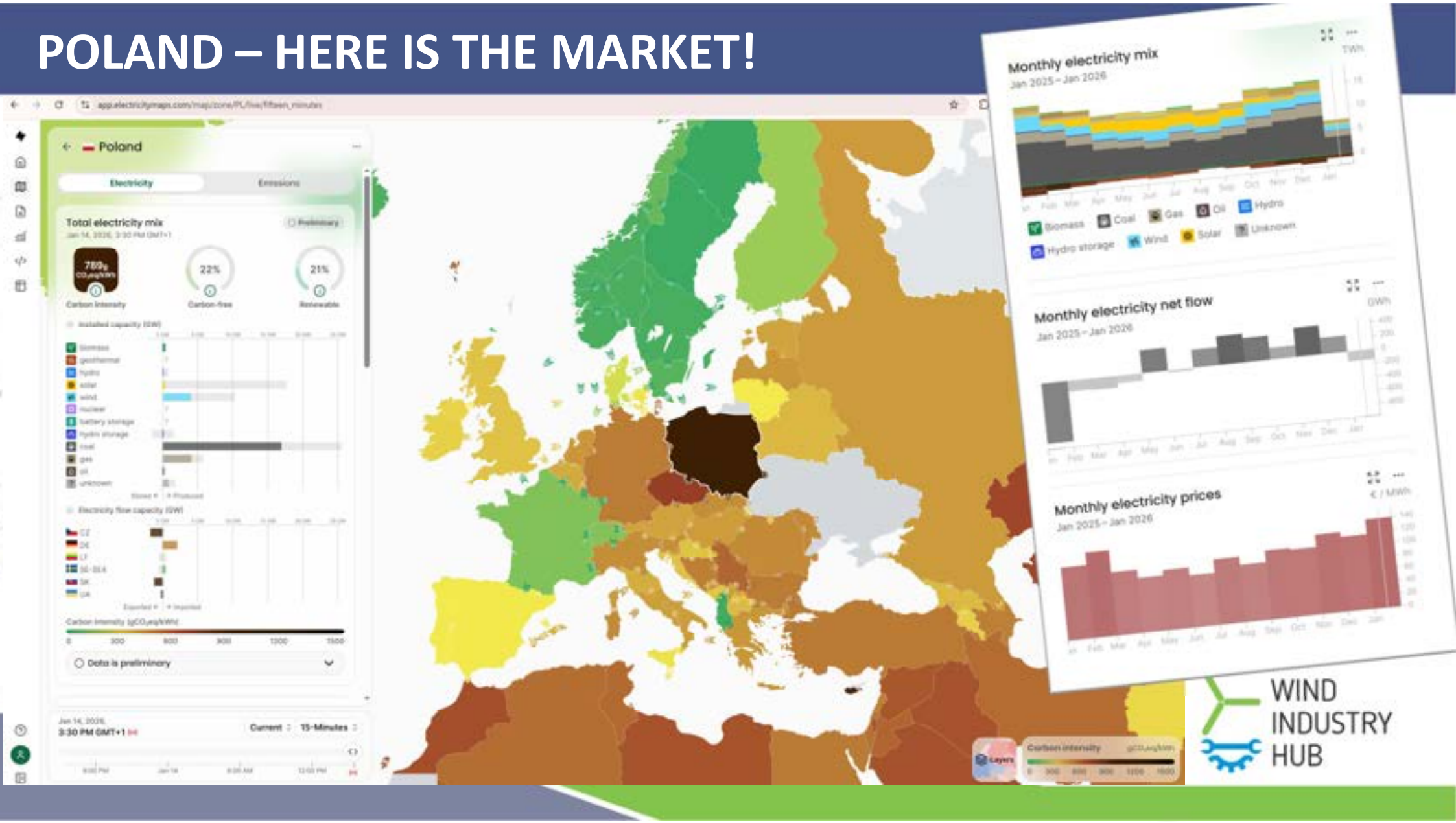
- Member of **Wind Europe**.

- PWEA has established in 2023 **the Wind Industry Hub Foundation** to **support the development of a strong wind industry supply chain and the involvement of domestic production and service companies from wind sector in Polish and European wind investments.**

WIND INDUSTRY HUB

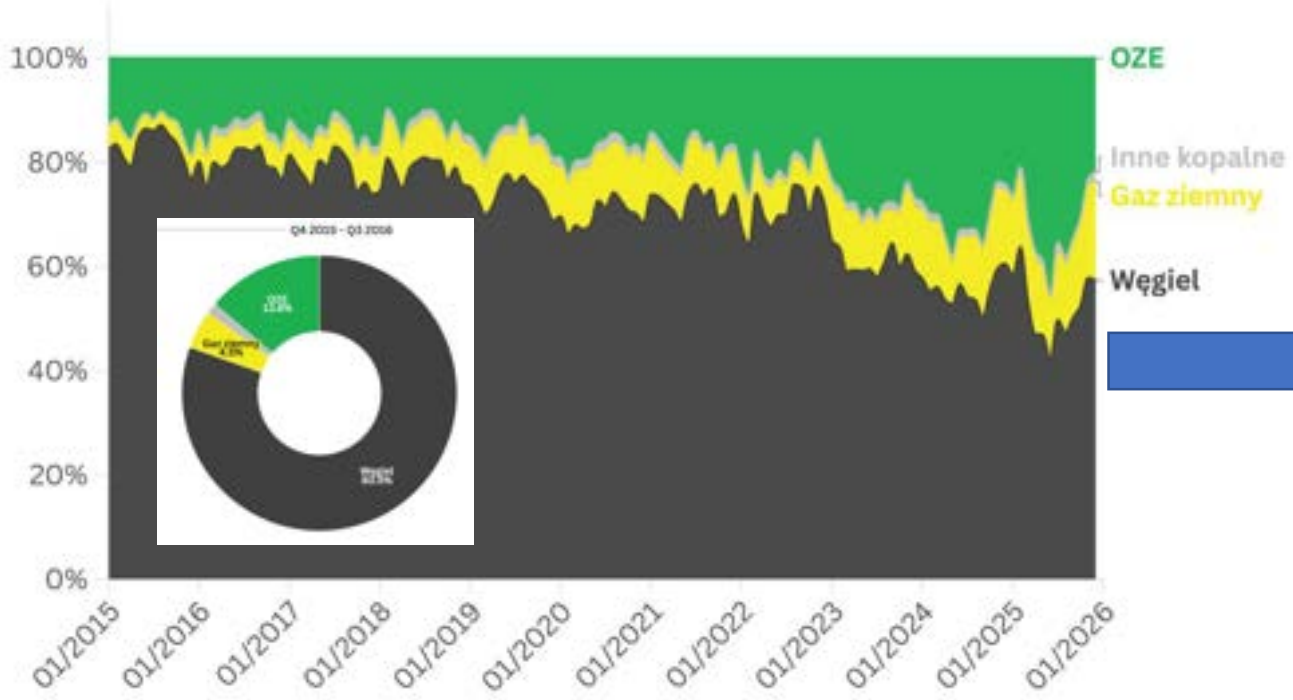
- ✓ Around 200 members

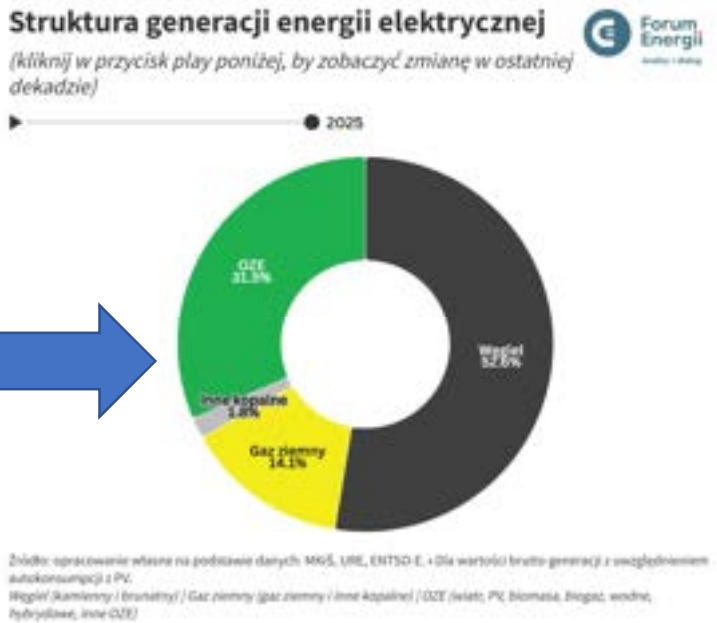
POLAND – HERE IS THE MARKET!



WIND INDUSTRY HUB

POLAND – RES DEVELOPMENT IN LAST DECADE





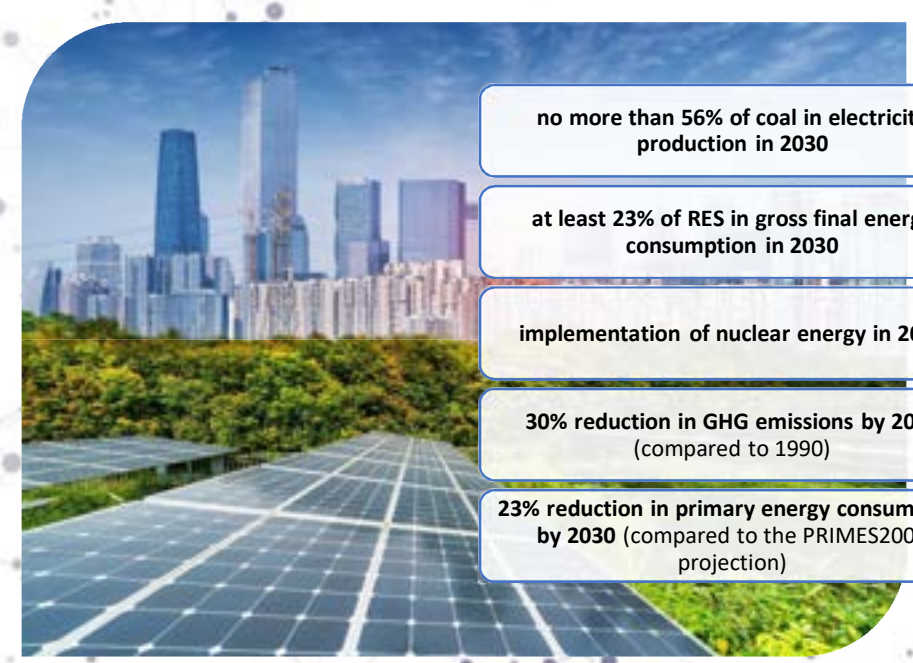
- The development of renewable energy sources has accelerated significantly since 2021 – in 2025, renewable sources already accounted for 31.5% of energy production.
- •Coal, which accounted for over 80% of generation in 2015, saw its share fall by 10.4 percentage points over six years (reaching 72.5% in 2021), with the following four years bringing further declines of 19.9 percentage points – to 52.6% in 2025.

Energy Transition 2015-2025

WIND INDUSTRY HUB

ENERGY POLICY OF POLAND UNTIL 2040 (EPP2040) AND NATIONAL ENERGY AND CLIMATE PLAN (NECP2024)

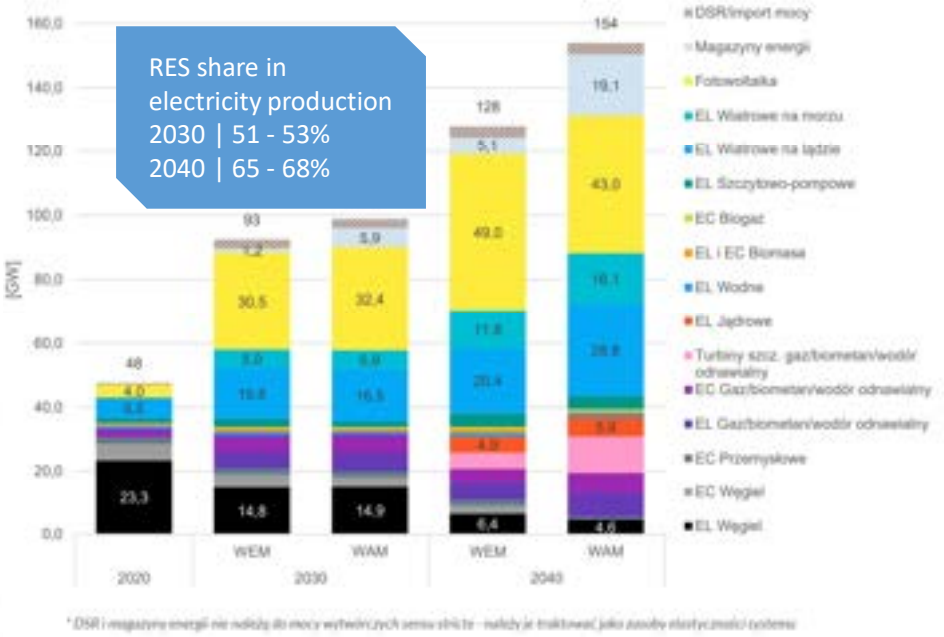
On 2nd February 2021 the Council of Ministers have adopted the Energy policy of Poland until 2040 (EPP2040). The document is surpassed by the reality… .



- **no more than 56% of coal in electricity production in 2030**
- **at least 23% of RES in gross final energy consumption in 2030**
- **implementation of nuclear energy in 2033**
- **30% reduction in GHG emissions by 2030** (compared to 1990)
- **23% reduction in primary energy consumption by 2030** (compared to the PRIMES2007 projection)

https://www.gov.pl/web/climate/energy-policy-of-poland-until-2040-epp2040

The Ministry of Energy of the Republic of Poland has published in December 2025 a draft of National Energy and Climate Plan for 2030 and 2040. Poland is delayed in submitting the NECP to European Comission.



https://www.gov.pl/web/energia/ministerstwo-energii-opublikowalo-projekt-krajowego-planu-w-dziedzinie-energii-i-klimatu-do-2030-i-2040-roku-to-kluczowy-dokument-dla-polskiej-energetyki-i-polskiej-gospodarki

WIND INDUSTRY HUB

PSE (Polish TSO) GRID EXPANSION PLAN

Energy system ready to operate without coal and gas in a decade!

Grid operator unveils in December 2025 new strategy with a horizon extending to 2040**:** By 2035, Poland's energy system is to be ready for safe operation on a zero-emission generation mix – without coal- or gas-fired power plants. **Conventional units will still be needed to generate electricity during periods of lower renewable output, but they will no longer provide services related to maintaining grid parameters.** Other pillars of the strategy include streamlining the connection of additional renewable installations to the grid, regulating the balancing of electricity purchases and sales by consumers, achieving climate neutrality by 2040, and opening a PSE office in Brussels.

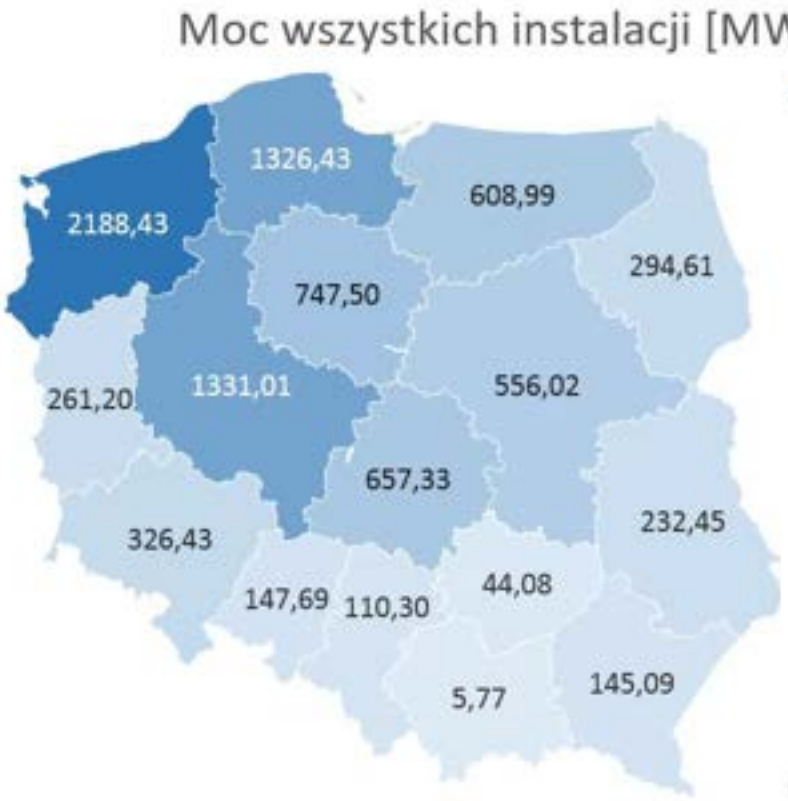
At the begining of 2026 r. Polskie Sieci Elektroenergetyczne (PSE) anounces national grid expantion plan, according to which TSO is implementing a PLN 66.3 billion grid expansion plan for 2025–2034 (with a 2037 outlook) to enable energy transition, covering 389 projects, over 5,000 km of new 400 kV lines, and 30 new substations. The plan focuses on integrating Baltic Sea offshore wind, nuclear power, and enhancing cross-border connections to meet rising demand.

Polskie Sieci Elektroenergetyczne (PSE) is Poland's state-owned transmission system operator, responsible for managing the national high-voltage electricity grid to ensure reliable power supply across the country. PSE oversees more than 15,000 km of transmission lines above 220 kV and 109 substations, balancing generation and demand in real-time while integrating renewables and handling cross-border flows with neighbors like Germany and Ukraine. From its national control center, it monitors the grid continuously and publishes live data on generation, consumption, imports/exports via pse.pl, aiding energy market transparency.

TOP 10 INVESTORS IN ONSHORE WIND IN POLAND

1. **PGE** - 797 MW,
2. **Orlen** (Energa & Orlen together) - 580 MW,
3. **RWE Renewables Polska** - 541 MW,
4. **Grupa Tauron** - 538,3 MW,
5. **EDP Renewables Polska** - 537,8 MW,
6. **Polenergia** - 492,6 MW,
7. **Energix Renewable Energies Ltd.** - 300,6 MV
8. **Qair Polska** - 262,5 MW,
9. **Mashav Energia** - 256,9 MW,
10. **Grupa Engie Polska** - 240,9 MW*

*data from the end of 2024



Renewables' instalations data base for Poland: https://www.ure.gov.pl/download/9/15842/MapaOZEna30-09-2025nastrURE.xlsx

WIND INDUSTRY HUB

FIRST OFFSHORE AUTION IN PL - 17-19 TH DEC. 2025

- **Poland has successfully concluded its first-ever competitive auction for offshore wind. This is a major milestone for the country's energy transition and for European offshore wind. The auction, held on 17 December 2025, awarded support to three major projects in the Baltic Sea, with a combined capacity of 3.4 GW. This outcome confirms Poland's commitment to building a robust offshore wind market and sends a strong investment signal to the industry and financial institutions across Europe.**
- The auction used a two-sided Contracts for Difference (CfD) scheme, providing investors with long-term price stability for 25 years. Winning bids ranged from approximately €113–€117/MWh, all below the ministerial price caps set earlier this year.
- The projects are expected to deliver their first electricity to the grid by December 2032, with total estimated generation over the support period reaching 330 TWh.

The auction was won by the following projects:

- Orlen, Orlen Neptun VIII Sp. z o.o. – **Baltic East** Offshore Wind Farm, with an installed electrical capacity of 900 MW and a price of PLN 476.88/MWh,
- the PGE project, **Baltica 9** Sp. z o.o. Wind Farm – MFW Baltica 9, with an installed electrical capacity of 975 MW at a price of PLN 489 per MWh;
- and the project by Polenergia and Equinor MFW Bałtyk I S.A. – MFW **Bałtyk I**, with an installed electrical capacity of 1560 MW at a price of PLN 492.32 per MWh.

The total capacity contracted in the auction is 3,435 MW (3.435 GW).

WIND INDUSTRY HUB

Polish Wave I projects

Source: Report „Offshore wind vessel availability until 2030: Baltic Sea and Polish perspective", H-Bix, PWEA, 2022

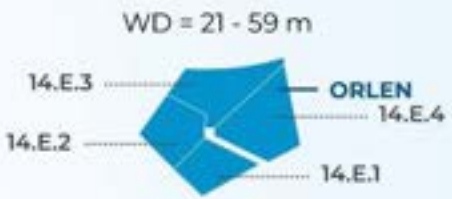
No.	Company	Project	Capacity [MW]	COD	Assumed turbine size [MW]
1	Polenergia / Equinor	Bałtyk II	720	2027	14+
2	Polenergia / Equinor	Bałtyk III	720	2027	14+
3	PGE / Ørsted	Baltica 2	1498	2027	14+
4	PGE / Ørsted	Baltica 3	1045	2030	14+
5	RWE	FEW Baltic II	350	2032	14+
6	PKN Orlen / NPI	Baltic Power	1140	2026	14+
7	Ocean Winds	B&C Wind	390	2028	14+
	Total for wave I		**5 933**		

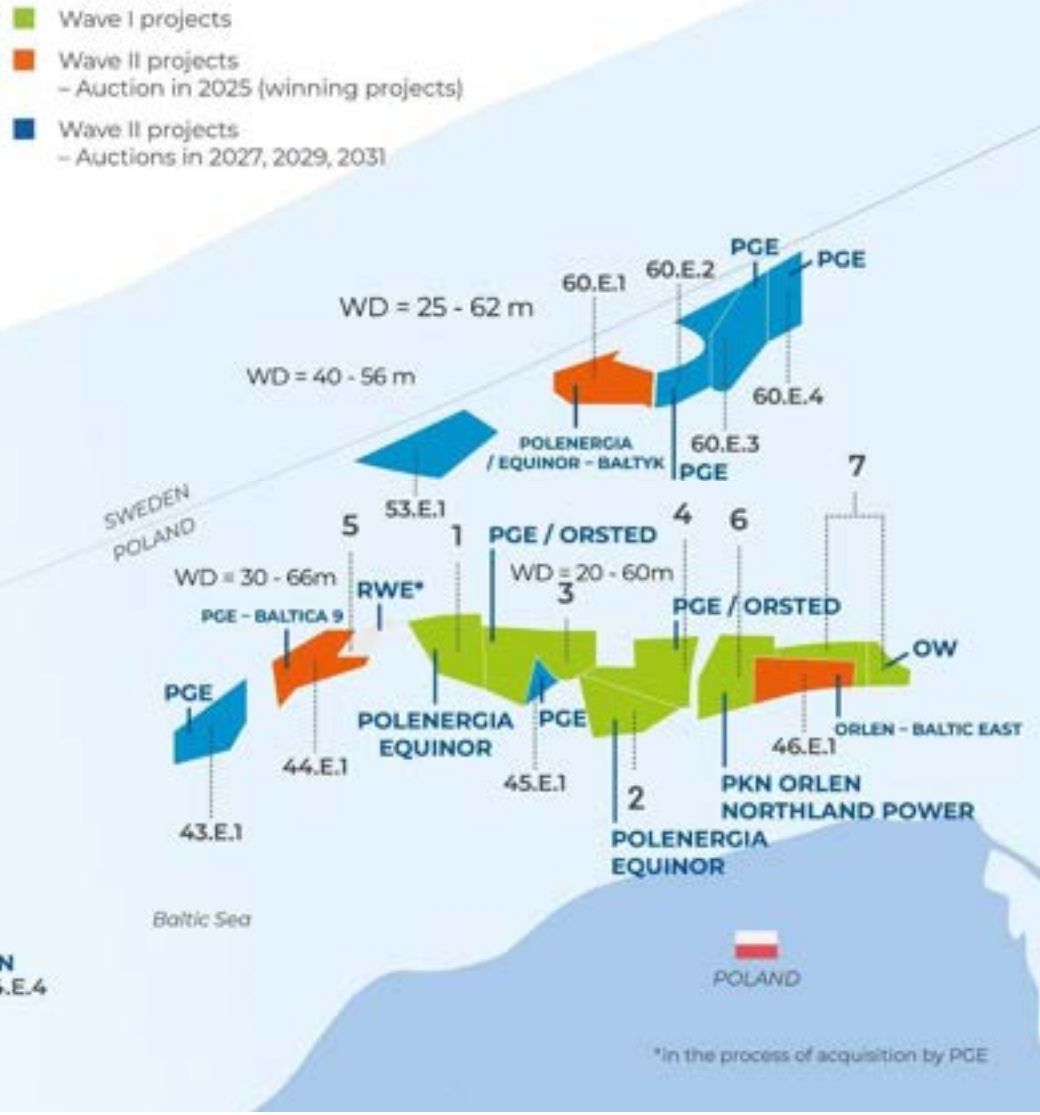
Polish Wave II projects and designated areas

Source: Report „Offshore wind vessel availability until 2030: Baltic Sea and Polish perspective", H-Bix, PWEA, 2022

Project from Wave II with seabed permit 2 Projects without CfDs – Wave II; auction in 2025					
No.	Company	Project	Capacity [MW]	COD	Assumed turbine size [MW]
1	Orlen	Baltic East	900	2032	18+
2	PGE	Baltica 9	975	2032	18+
3	Polenergia / Equinor	Bałtyk I	1560	2032	18+
	Total		**3 435**		

Next auctions are planned for: 2027 (4GW), 2029 (2GW), 2031 (2GW)





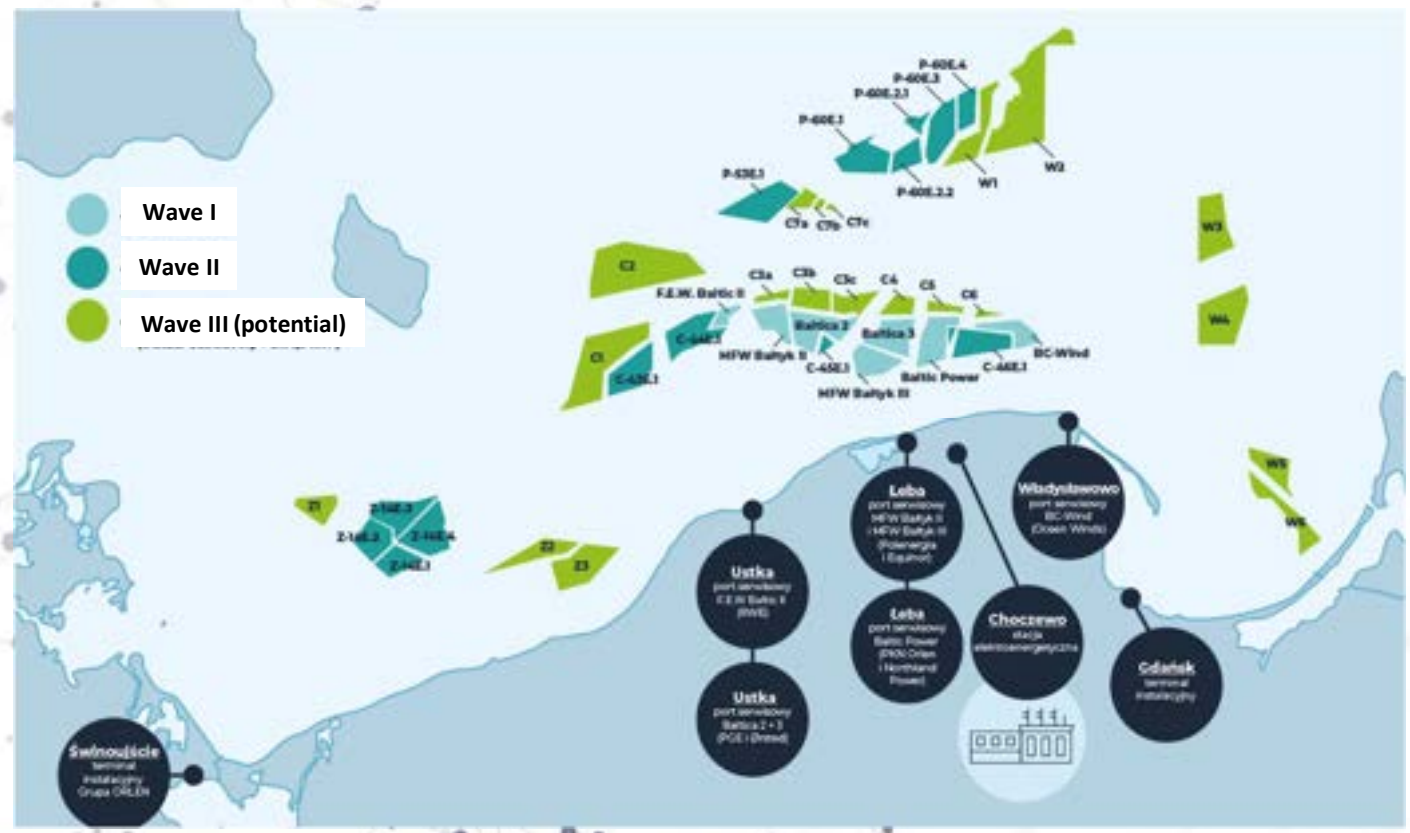
RWE SELLS PROJECT FROM THE FIRST WAVE OF PROJECTS IN POLAND

- RWE is selling the F.E.W. Baltic II offshore wind farm project with a capacity of 350 MW in the Baltic Sea to Polska Grupa Energetyczna (PGE). The transaction, involving RWE Offshore Wind Poland, will enable PGE to develop the project located north of Ustka, which will accelerate the implementation of PGE's objectives in the field of offshore wind energy (OWE). The agreement is expected to be finalised in the first quarter of 2026.
-
- Project: F.E.W. Baltic II (350 MW), approximately 50 km from the shore, north of Ustka.
- Seller: RWE (through RWE Offshore Wind Poland).
- Buyer: PGE.
- Additionally: RWE has also transferred to PGE the environmental decision for the neighbouring area (44. E. 1), which will streamline the work.
- Objective: To accelerate the development of OWF in Poland and leverage synergies with existing PGE projects (such as Baltica 9).
- When: The transaction is expected to close in Q1 2026

WIND INDUSTRY HUB

OFFSHORE WIND IN POLAND - AREAS

Wave I – 5,9 GW till 2030; Wave II – 12 GW till 2040 (18 GW in total in 2040)



PWEA's report of offshore wind potential identified
20 new areas with a total area of 2,171.5 km^2, including 18 in the Polish Exclusive Economic Zone and 2 within the territorial sea, with the potential to be used for offshore wind development. These areas could contribute 17.7 GW, so total potential would be 33 GW. Works started at the Ministry of Infrastructure.

WIND INDUSTRY HUB

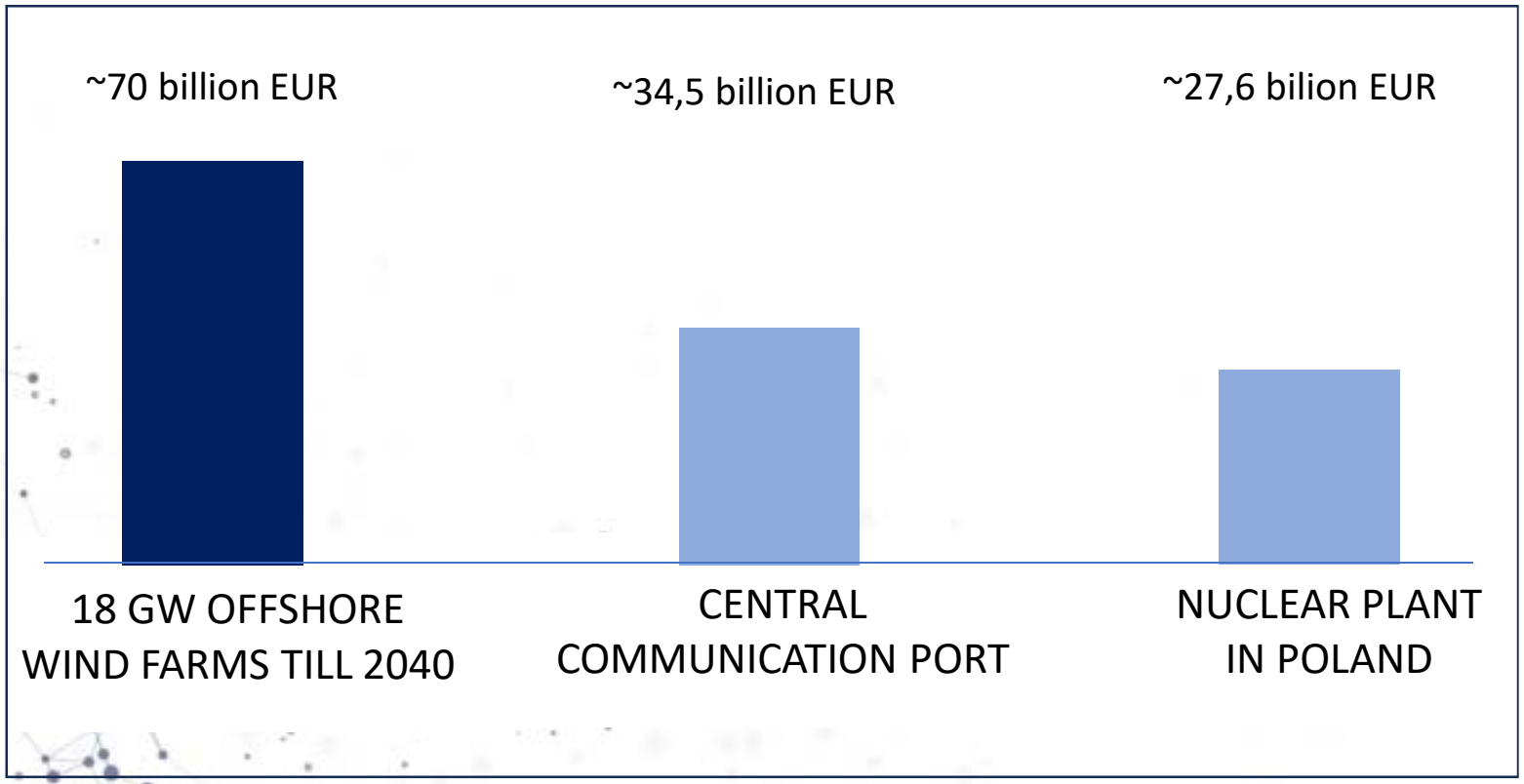
OFFSHORE WIND INFRASTRUCTURE DEVELOPMENT IN POLAND

https://www.windindustry.pl/wp-content/uploads/2025/04/Flagowe-inwestycje-2025ang-1.pdf

WIND INDUSTRY HUB

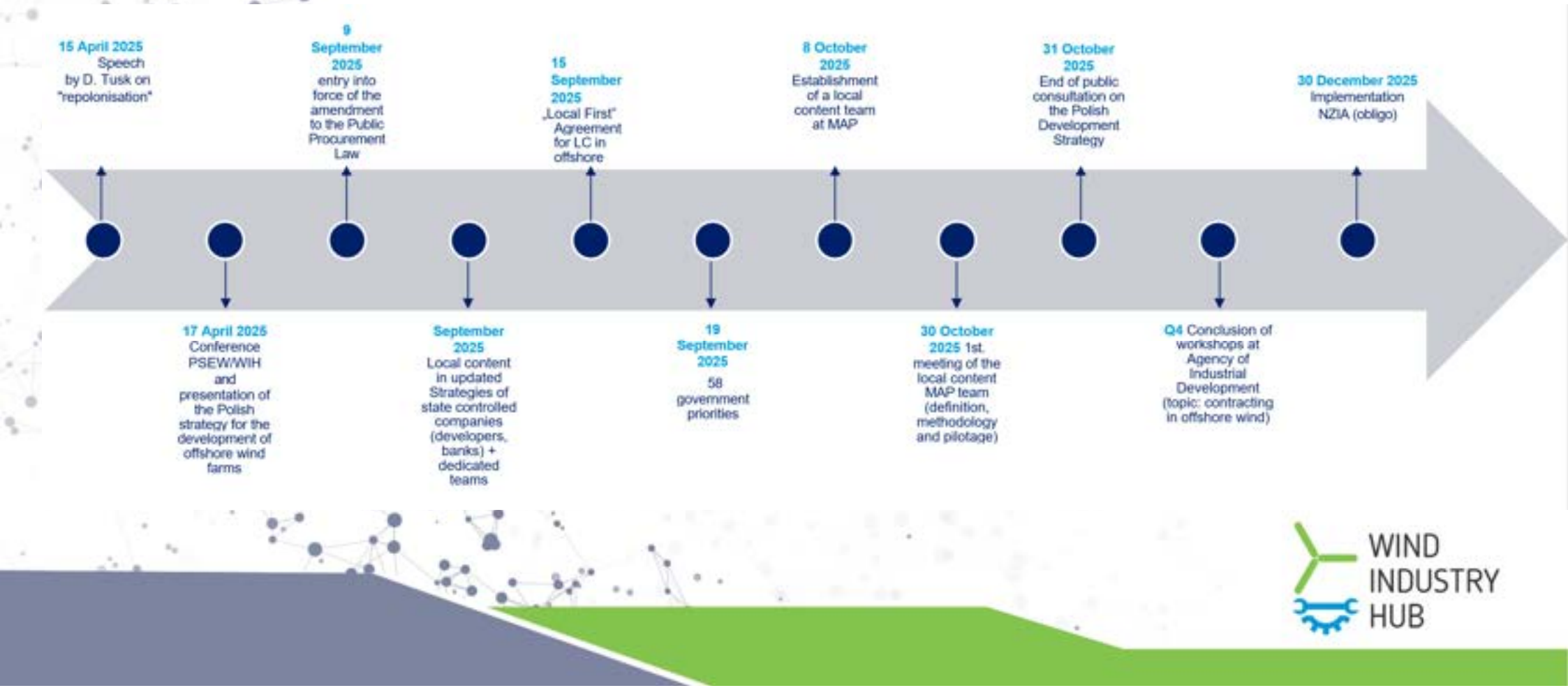
OFFSHORE WIND REPRESENTS HUGE INVESTMENT AND REVENUE POTENTIAL FOR COMPANIES

CONSTRUCTION OF OFFSHORE WIND FARMS IN POLAND IS THE LARGEST INVESTMENT PROGRAM IN DECADES, ALLOWING ENTREPRENEURS TO REALIZE REVENUES OF UP TO 4,6 BILLION EUR A YEAR AVERAGE



WIND INDUSTRY HUB

LOCAL CONTENT – FROM IDEA TO GOVERNMENTAL STRATEGY



WIND INDUSTRY HUB

OUR DELIVERABLES OF SECTORAL STRATEGY AND KEY STAKEHOLDERS

10 STRATEGIC PACKAGES

Program package. Adoption of the Polish Strategy for the Development of the Offshore Wind Farm Industry.

Market package. Adoption of an updated PEP2050 taking into account the overall target of 33 GW for offshore wind farms.

European package. The assumptions of the Strategy as a contribution to the Polish policy at EU level.

Production financing package. Availability of guarantees for the implementation of the largest contracts in OWF projects in Poland and Europe.

Innovation Package. The strategy envisages the establishment of a central offshore wind laboratory in Poland.

Education and work package. Adoption and implementation of the Wind Energy Competence Development Program.

Investment financing package. Announcing grant or loan programs.

Safety package. A set of guidelines for the safety and physical security of key production nodes.

Priority Implementation Programs. The strategy will include the launch of Priority Implementation Programmes.

Institutional package. Executive Board chaired by the Offshore Plenipotentiary.

KEY STAKEHODERS WE MET

- Representatives of the European Commission and Parliament
- Ministry of Climate and Environment
- Ministry of Finance
- Ministry of Energy
- Ministry of Development and Technology
- Ministry of Infrastructure
- Ministry of Funds and Regional Policy
- Representatives of the Sejm and Senate
- Polish Development Fund (PFR)
- Industrial Development Agency (ARP)
- Polish Investment and Trade Agency
- Polish Agency for Enterprise Development (PARP)
- Export Credit Insurance Corporation (KUKE)
- Local authorities

WIND INDUSTRY HUB

KEY RECOMMENDATIONS

10 STRATEGIC PACKAGES

IMPLEMENTATION PRIORITY PROGRAMS

Modern services for planning, designing and monitoring

Comprehensive supply chain for offshore wind turbines

New European OWF installation company based in Poland with national fleet

Installation of foundations for offshore wind farms

Land and sea cables for offshore wind farms

National project for a fully equipped offshore substation (OSS)

Security

Innovative operation and maintenance services

WIND INDUSTRY HUB

UC84 Act – accelerating grid connections for RES

The Energy Law amendment (project UC84) has completed the legislative process and it was signed by the President in early April 2026. Published in the Journal of Laws on April 15, 2026, most provisions became legally binding in late April 2026. This act is of key importance for the development of new RES capacities.

The 2026 Polish Energy Law amendment (UC84) reforms grid connections to optimize infrastructure and accelerate renewables by:

- implementing stricter, 12-month validity for connection terms,
- expanded cable pooling,
- and mandatory financial security deposits.

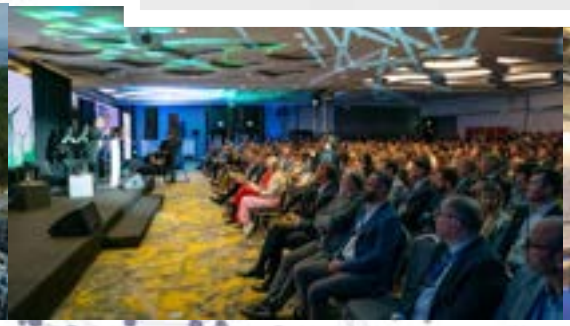
Key changes also include:

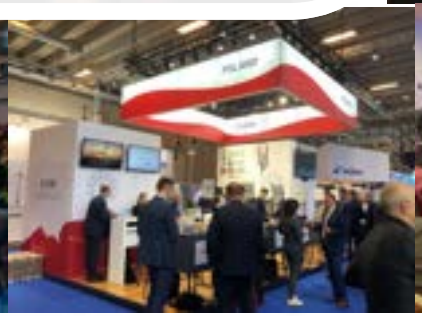
- designated "no-connection" zones,
- mandatory project milestones,
- and a pilot program for capacity auctions.

WIND INDUSTRY HUB

PWEA ANNUAL CONFERENCE – -8-10 JUNE 2026, SWINOUJSCIE

- Over 20 editions
- Approx. 3000 participants
- Around 200 speakers
- More than 100 exchibitors
- 3 days of:
  - panel discussions
  - workshops
  - networking
  - B2B meetings
  - study tours
  - sport activities
  - evening activities





INDUSTRY HUB

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WIND INDUSTRY HUB

Propel Ireland

Ireland-Canada Offshore Wind Supply Chain Opportunities

Wind Europe Madrid 2026

21st April 2026

Georgina Foley

A coordinated, industry-aligned innovation centre to support Ireland's offshore wind ambition

Connect supply chain, developers, ports, research & government
Focus innovation on solving delivery challenges

Propel Ireland

Supply Chain

Develop a National cluster

All Island strategy

Developers

Provide a clear link to developers for industry priorities

Bridge the gap

Large Energy Users

Data centres & relevant industrial energy consumers

Market sizing

Research

SEAI, Research Ireland,

Technology Centres,

International Institutes

Align with market problems

Demo & Testing Facilities

Link into existing facilities

Leveraging MaRINERG-I

Develop Irish demo sites

Opportunity Planning

Skills

DFHERIS offshore wind skills action plan

Support Training Hub

Propel Ireland

Two Atlantic nations, shared challenges, complementary strengths

- Deep water Atlantic conditions
- Emerging offshore wind markets
- Strong port and marine heritage
- Focus on innovation and resilient supply chains

Opportunity: build a transatlantic offshore wind partnership—not from theory, but from delivery experience

Propel Ireland

What Ireland Brings to the Table

Innovative offshore wind supply-chain capability

Ireland’s supply chain already supports offshore wind through:

- Resource & energy assessment
- Marine surveying & metocean data
- Environmental & nature-inclusive design
- Construction, electrical & instrumentation services
- O&M and asset-life extension
- Floating offshore wind innovation

Delivery in Atlantic conditions

Propel Ireland

Early-Stage development & bankability helping projects get off the ground faster

Irish capability
- Advanced resource & energy assessment
- Yield analysis and bankability support
- Early project definition in challenging environments

Canadian alignment
- System-level modelling and optimisation
- Hybrid energy and grid-aware planning

Impact
- Faster site selection
- Lower development risk
- Stronger investor confidence

Propel Ireland

GALETECH ENERGY SERVICES

Simply Blue Energy

SOURCE GALILEO

DP ENERGY

ESB Energy for generations

brightwind

TECHWORKS MARINE

Marine Surveying & Ocean Data Atlantic-tested offshore intelligence

Ireland
- Geophysical & metocean surveys: acquisition → delivery
- Real-time marine monitoring
- Uncrewed Surface Vessels (USVs) to lower cost, risk, emissions

Canada
- World-class oceanography & measurement systems
- Acoustics, and long-duration monitoring expertise

Together
Best-in-class site characterisation for floating offshore wind

Propel Ireland

GREEN REBEL

XOCEAN
Ocean data, delivered.

CATHX OCEAN

TECHWORKS MARINE

Environmental performance by design—not by retrofit

Ireland
- Nature-Inclusive Design (NID) methodologies
- Digital ecological monitoring tools
- Lifecycle-based environmental planning

Canadian strength
- Marine environmental science
- Underwater acoustics & impact assessment
- Regulatory-grade monitoring

Outcome
- Strong consenting pathways
- Trusted stakeholder engagement
- Better outcomes for ecosystems and communities

RESTORE BLUE

Propel Ireland

Ports, Construction & Marine Operations - Turning ports into offshore wind growth hubs

Ireland
- Offshore construction delivery experience
- Engineering, project management, procurement
- Electrical & instrumentation services

Canada
- Major port capacity and logistics expertise
- Marshalling, heavy lift, marine services
- Strategic Atlantic locations

Value
- Knowledge transfer for first-of-a-kind projects
- Faster port readiness
- Reduced execution risk

EUROPLAN GROUP

EASTGATE ENGINEERING

COMBILIFT LIFTING INNOVATION

DSG DOYLE SHIPPING GROUP

Propel Ireland

Operations,maintenance & Asset Life

Designing for long-term performance from day one

Irish capability

- Turbine control module inspection & repair
- Power-conversion system refurbishment
- Asset life extension & downtime reduction

Relevance to Canada

- Harsh Atlantic operating conditions
- Long asset lifetimes
- Early focus on O&M cost control

ANECTO POWER ELECTRONICS

AKURAY RENEWABLE TECHNOLOGIES SERVICES

re:bot

AVONMORE ELECTRICAL

Propel Ireland

Floating Offshore Wind: The Shared Opportunity where the alignment is strongest

Common realities

- Deep waters
- Harsh Atlantic metocean
- Early-stage floating wind markets

Ireland

- Innovation in monitoring, installation, and O&M
- Supply-chain coordination through Propel Ireland

Canada

- Fabrication, engineering, port expansion
- Large-scale future pipeline

Together

Faster floating wind industrialisation

Propel Ireland

Subsea Micropiles

Dublin Offshore

TFI Marine

Propel Ireland: a Platform for collaboration, not just conversation

Propel Ireland enables:

- Joint innovation & demonstration projects
- SME-to-developer collaboration
- Technology validation & de-risking
- Alignment with real project pipelines

For Canada:

- A structured way to partner with proven offshore wind innovators

Propel Ireland

What Collaboration Could Look Like

Practical next steps

- Joint Ireland–Canada innovation calls
- Floating wind system pilots
- Survey & monitoring co-development
- Port readiness and O&M knowledge exchange
- Skills and workforce collaboration

Focus: co-development, not one-way supply

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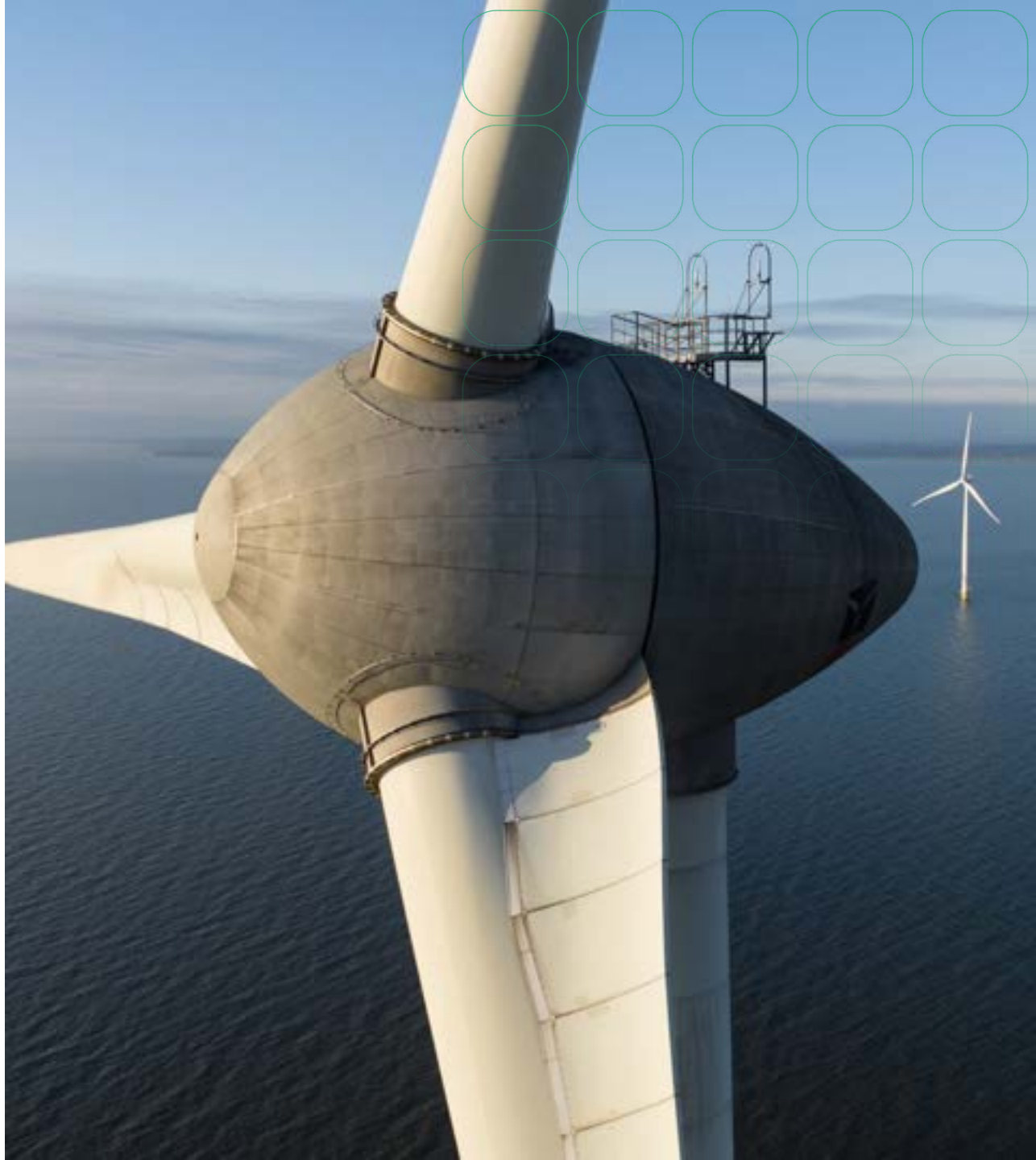
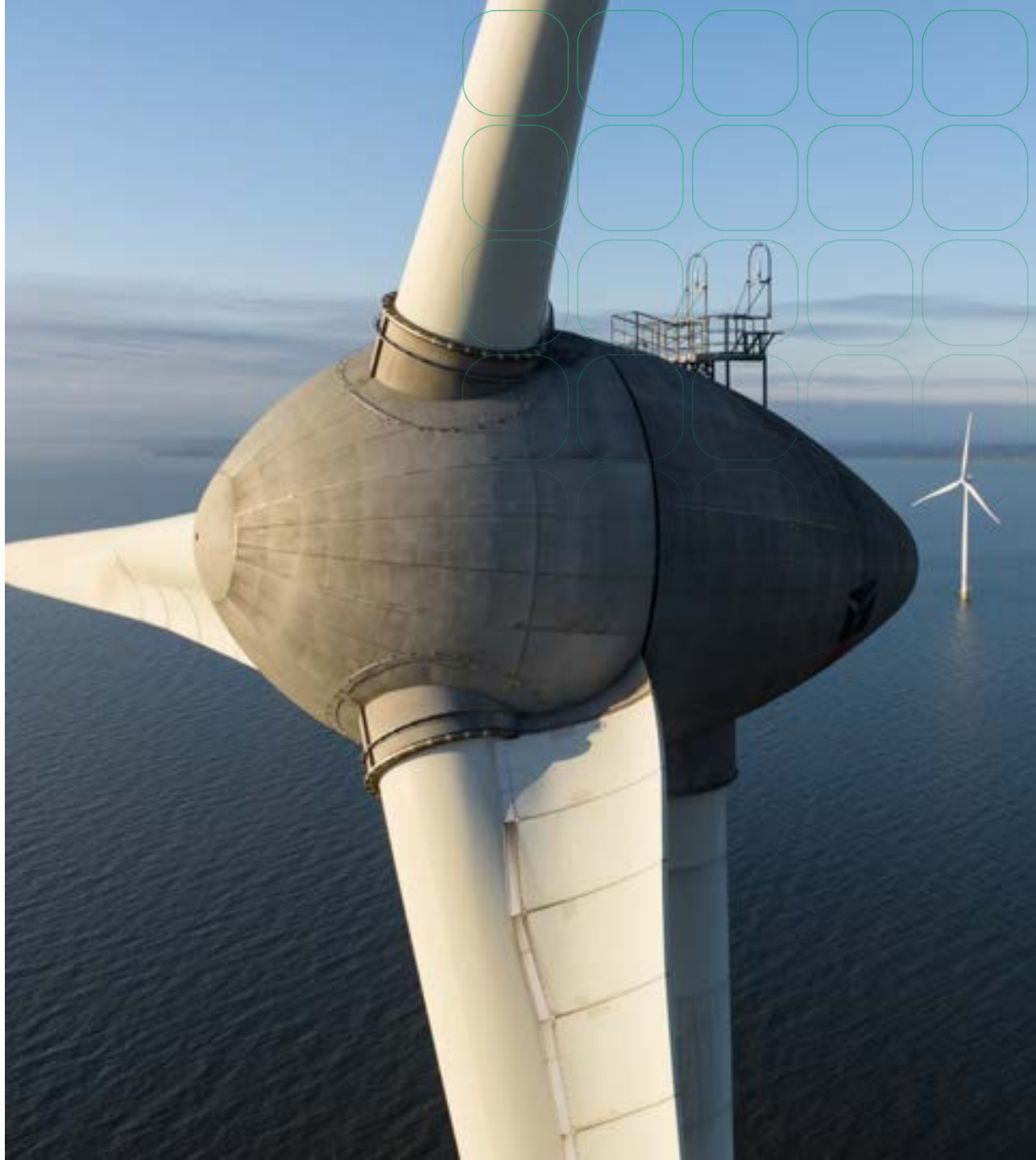


Why This Matters

Delivering more than megawatts

- Faster project delivery
- Lower risk and cost
- Stronger environmental outcomes
- Local jobs and industrial capability
- Long-term Atlantic energy resilience

Propel Ireland



A shared Atlantic opportunity

Ireland brings:

- Innovation, Offshore wind services and Atlantic delivery experience

Canada brings:

- Scale, Industrial capacity, Long-term opportunity

Together, we can build a strong, resilient transatlantic offshore wind supply chain.

Propel Ireland

gfoley@enterprise-ireland.com


A-techSYN
ACTEON
AFRY
AIRCON Mech
AKURAY
AM
ANECTO
AQUAFACT
ARUP
ARQ
ASL
AWT
AVONMORE ELECTRICAL
BladeBridge
BMS TORQUE SOLUTIONS
BOXCORE
brightwind
BYRNELOOBY
CARA
COMBILIFT
Commissioners of IRISH LIGHTS
CONSUB
CONSTRUCTION DISPUTE SOLUTIONS
DSG
Druid
Dublin Offshore
ecocem
EIRECOMPOSITES
EMR
ENERGYPRO
Enerview solutions
entrust
EUROPLAN
EXCEEDENCE
EVIVIEW
FEHILY TIMONEY
FLI
GDG
GALETECH
GEOSCIENCE IRELAND
GREEN REBEL
GEODIS
H&MV
HIBERNIAN MARINE SYSTEMS
HYDRO SURVEY
Inland and Coastal
innovision
IRISH COMMERCIAL CHARTER BOATS
IRISH SEA CONTRACTORS
JENNINGS O'DONOVAN
JFC MARINE
KILBRIDE POWER
kirby
Marine Institute
MIDLAND STEEL
MMG WELDING
MWP
netfeasa
OCM
ORT Offshore
PEMCAS
ReBOT Renewable BOT
ServusNet
SINBAD
Subsea Micropiles
SUIR
SNG SWAN NET GUNDRY
TelLab
TECHWORKS MARINE
TFI Marine
tli GROUP
KILLYBEGS
WEST COAST DIVING
VRAI
XOCEAN


SCOTLAND
YOUR OFFSHORE WIND PARTNER
Matthew Clark, Inward Investment Specialist
SCOTTISH DEVELOPMENT INTERNATIONAL
#SCOTLANDISNOW
marine renewables canada
SCOTLAND

WHO ARE SDI?

We are the international arm of **Scottish Enterprise** – **Scotland's economic development agency**. We aim to:

- ✓ **Grow** Scotland's exports
- ✓ **Increase** inward investment

- Our mission is to help international companies invest, grow and succeed in Scotland.
- We provide tailored support across the full inward investment journey – from initial interest to long-term growth.
- We connect you to the right people, the right places, and the right funding opportunities.

#SCOTLANDISNOW


SCOTLAND'S
OFFSHORE WIND
OPPORTUNITY
#SCOTLANDISNOW
SCOTLAND

A MARKET OF SCALE

SCOTTISH OFFSHORE WIND IN NUMBERS

DID YOU KNOW?

Scotland is a global **TOP TEN** offshore wind market

40GW+
offshore wind potential project pipeline in Scottish waters plus over **4GW** already operational

30GW
of ScotWind projects and **5.4GW** of INTOG projects

24GW+
planned floating wind projects; one of the world's largest markets

UP TO £500M
Scottish Government investment commitment over 5 years to strengthen and expand Scotland's offshore wind ports and supply chain

£1.5BN PER PROJECT
(on average) pledged by ScotWind developers to be spent in Scotland, supercharging local supply chains

LONG-TERM, STRATEGIC COMMITMENT TO OFFSHORE WIND

A CULTURE OF INNOVATION

SCOTLAND'S RECENT INNOVATIONS IN OFFSHORE WIND

2007
Beatrice Demonstrator

The world's first deep-water wind project, commissioned at 45 metres water depth.

The world's first floating wind farm (30 MW).

Hywind Scotland
2017

2018
EOWDC (European Offshore Wind Development Centre)

The world's most powerful turbines installed on industry-first suction jacket foundations.

The world's first floating wind project to use 9.5 MW turbines (50 MW).

Kincardine Floating Offshore Wind Farm
2020

2022
Hywind Scotland

Named the world's best-performing offshore wind farm based on its first five years of operation.

The world's deepest wind-turbine foundation is installed off the coast of Angus, Scotland.

Seagreen Wind Farm
2023

LARGEST PLANNED OFFSHORE WIND CAPACITY

POSSIBLE BUILD OUT SCENARIO IN SCOTLAND

offshore wind Scotland

Offshore Wind Projects	Capacity
Current Projects	10 GW
ScotWind	30 GW
INTOG	5.4 GW
Total Expected Capacity	> 40 GW

2025
Moray West & Neart Na Gaoith windfarms
Two major offshore projects to become operational in 2025: Moray West (882MW) and Neart na Gaoith (450MW)

~9GW build out 2030
Potential build out of an additional ~9GW of fixed and floating offshore wind in Scottish waters by 2030

Early 2030s
~17GW build out
Potential build out of an additional ~17GW of fixed and floating offshore wind in Scottish waters by early 2030s

Later 2030s
~15GW build out
Potential for additional ~15GW of offshore wind to be built out in Scottish waters by the 20333/4 and beyond

SUMMARY OF SCOTLAND'S LEASING ROUNDS

SCOTWIND LEASING ROUND

30.1GW TOTAL OFFSHORE WIND CAPACITY (20 (NOW 19) SITES)

19.3GW FLOATING WIND (64% OF PROJECTS) = LARGEST MARKET IN THE WORLD

£28.8bn POTENTIAL INVESTMENT IN SCOTLAND

MARKET OPPORTUNITY: DESIGN, MANUFACTURE & SUPPLY COMPONENTS

INTOG (INNOVATION AND TARGETED OIL AND GAS) LEASING ROUND

5.4GW FLOATING WIND

WORLD'S 1ST LEASING ROUND TO DECARBONISE OIL & GAS

IN INNOVATION LEASES
5 LEASES - 450MW

TOG TARGETED OIL & GAS
7 LEASES - 5GW

offer exciting opportunities for technology development and supply chain engagement

ALLOCATION ROUNDS & KEY PROJECTS

#SCOTLANDISNOW

SCOTLAND

CONTRACTS FOR DIFFERENCE

ALLOCATION ROUND 7

8.4 GW offshore wind capacity awarded in AR7

8.245 GW bottom fixed

0.193 GW floating

PENTLAND FLOATING OFFSHORE WIND FARM

Berwick Bank Wind Farm

Projects provide increased opportunities for Scottish supply chain and ports to win business across the UK

- Timelines shortened to enable annual allocation rounds
- **AR8** launching July 26, with applications opening 13/05/26
- Up to 12.6GW of floating eligible to enter in Scotland

Scotland – Bottom Fixed	
Project	GW Awarded
Berwick Bank Phase B	1.380
Total	**1.380**

Scotland – Floating	
Project	GW Awarded
Pentland	0.0925
Total	**0.0925**

rUK – Bottom Fixed	
Project	GW Awarded
Awel Y Mor (A)	0.775
Dogger Bank SE & SW	3.000
Norfolk Vanguard East & West	3.090
Total	**6.865**

rUK – Floating	
Project	GW Awarded
Erebus	0.100
Total	**0.100**

AR7

SCOTTISH PROJECTS

Berwick Bank

Berwick Bank Wind Farm

- Fixed
- Developer: SSE
- 4100 MW
- 307 Turbines
- Consented
- AR7 result: 1.38 GW awarded

- Positive implication for inward investment in Scotland from OEMs and Tier 1s
- O&M and Marshalling likely for Scottish Ports
- No major fabrication or installation contracts awarded yet but would expect that now to progress

Pentland

PENTLAND FLOATING OFFSHORE WIND FARM

- Floating
- Developer: CIP
- 92.5 MW
- 7 Turbines
- Consented
- AR7 result: 92 MW awarded

- Small project but important continued momentum in floating space
- O&M port likely to be selected soon
- No substantial contracts awarded yet
- Investment from GB Energy, National Wealth Fund and SNIB could increase the focus on local content

Both expected to boost investor and supply chain confidence in the renewable energy industry

SCOTTISH OFFSHORE WIND PROJECTS

>40GW
Scottish project pipeline

24.9GW
floating wind

20.7GW
Bottom fixed

INTERACTIVE MAP
For the most up-to-date information on our ScotWind and INTOG projects please visit our interactive map:
SIM Milestone Map | Offshore Wind Scotland

Operational - 4,295MW
1. Robin Rigg - 174MW
2. Beatrice - 588MW
3. Hywind Scotland - 30MW
4. Aberdeen Bay - 93MW
5. Kincardine - 48MW
6. Levenmouth Turbine - 7MW
7. Moray East - 950MW
8. Moray West - 882MW
9. Seagreen - 1,075MW
10. Neart na Gaoithe - 448MW

Under Construction - 1,142MW
11. Inch Cape - 1,142MW

Consented - 6,790MW
12. Seagreen 1a - 420MW
13. Forthwind - 20MW
14. Pentland - 100MW
15. West of Orkney - 2,000MW
16. Salamander - 100MW
17. Berwick Bank - 4,150MW

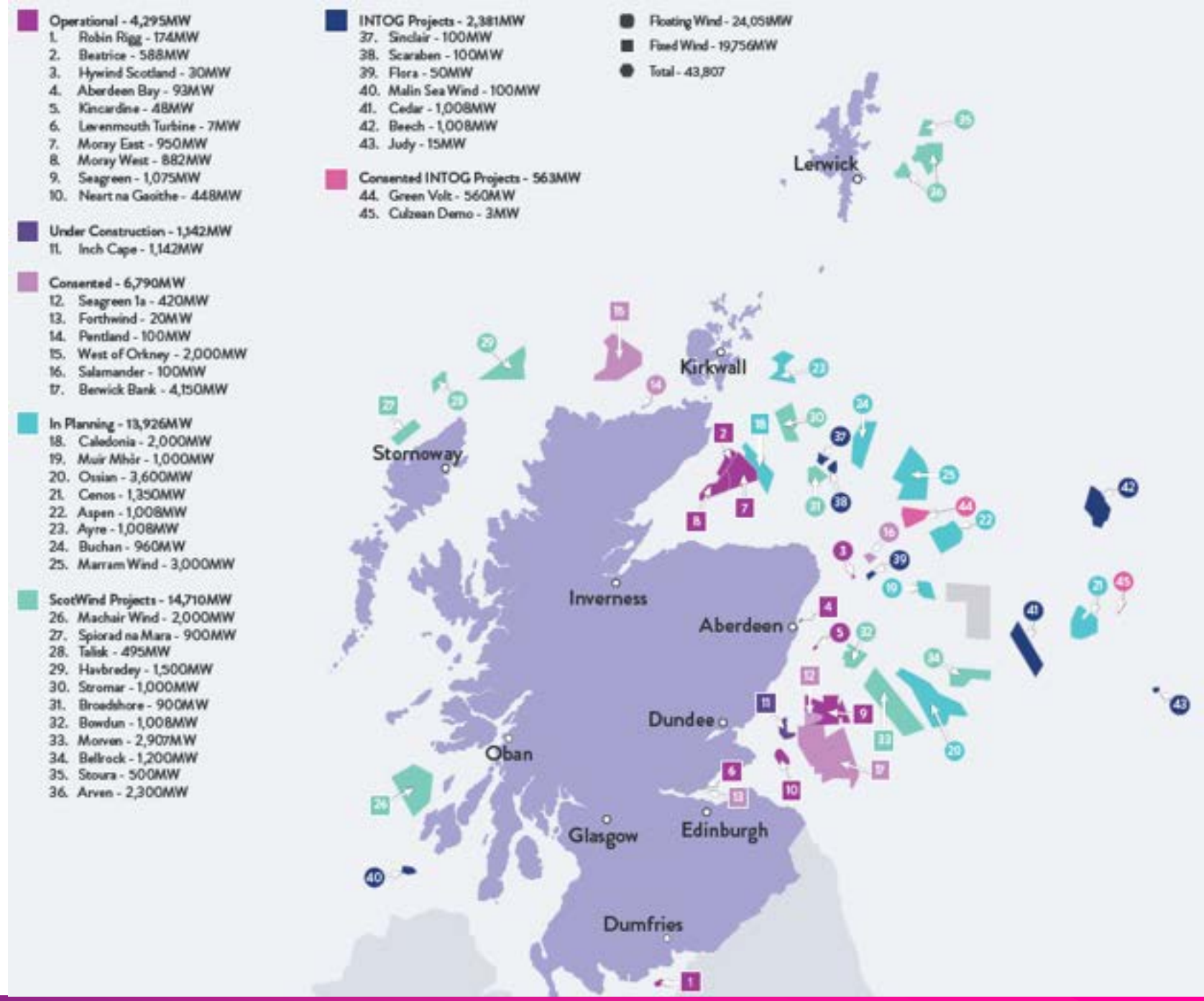
In Planning - 13,926MW
18. Caledonia - 2,000MW
19. Muir Mhòr - 1,000MW
20. Ossian - 3,600MW
21. Cenos - 1,350MW
22. Aspen - 1,008MW
23. Ayre - 1,008MW
24. Buchan - 960MW
25. Marram Wind - 3,000MW

ScotWind Projects - 14,710MW
26. Machair Wind - 2,000MW
27. Spiorad na Mara - 900MW
28. Talisk - 495MW
29. Havbredey - 1,500MW
30. Stromar - 1,000MW
31. Broadshore - 900MW
32. Bowdun - 1,008MW
33. Morven - 2,907MW
34. Bellrock - 1,200MW
35. Stoura - 500MW
36. Arven - 2,300MW

INTOG Projects - 2,381MW
37. Sinclair - 100MW
38. Scaraben - 100MW
39. Flora - 50MW
40. Malin Sea Wind - 100MW
41. Cedar - 1,008MW
42. Beech - 1,008MW
43. Judy - 15MW

Consented INTOG Projects - 563MW
44. Green Volt - 560MW
45. Culzean Demo - 3MW

- Floating Wind - 24,051MW
- Fixed Wind - 19,756MW
- Total - 43,807




SCOTTISH SUPPLY CHAIN &
MARKET
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SCOTLAND

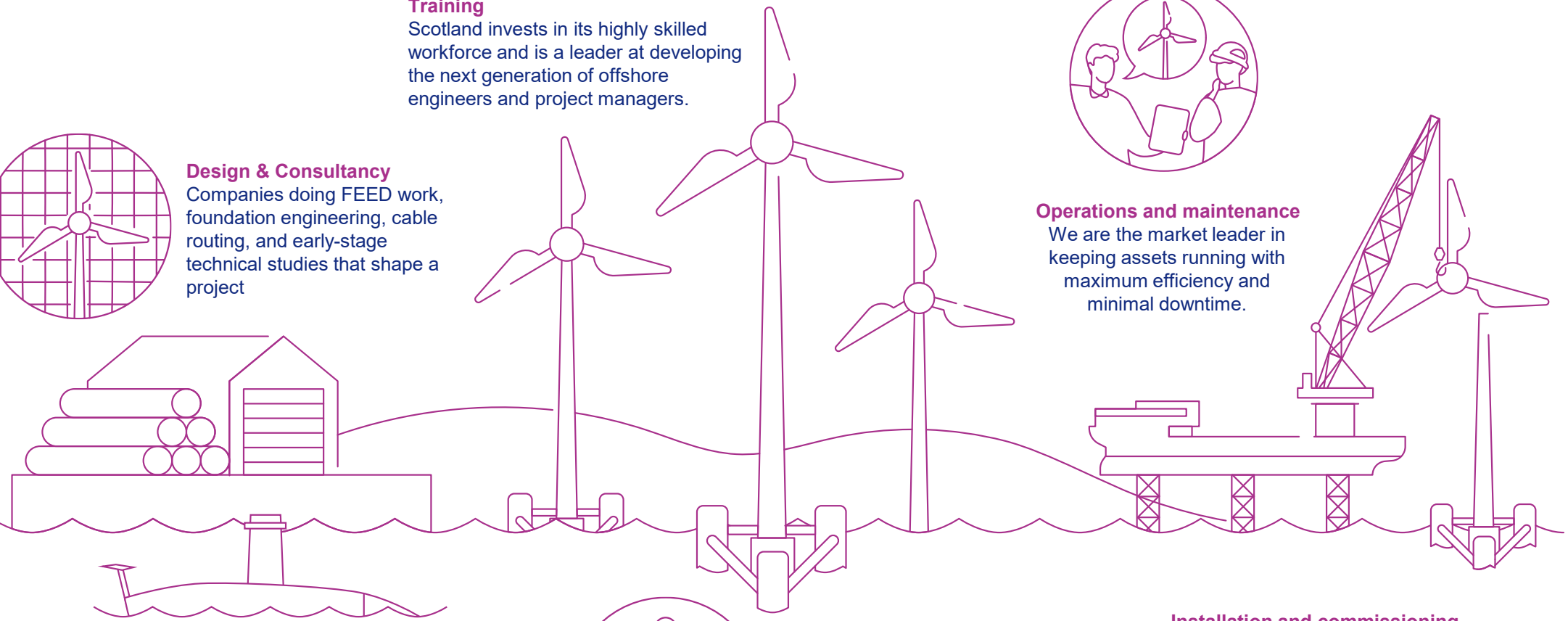
SCOTTISH

CAPABILITIES

Training
Scotland invests in its highly skilled workforce and is a leader at developing the next generation of offshore engineers and project managers.

Design & Consultancy
Companies doing FEED work, foundation engineering, cable routing, and early-stage technical studies that shape a project

Operations and maintenance
We are the market leader in keeping assets running with maximum efficiency and minimal downtime.



Survey & Site Characterisation
We use the latest technology to scope and inspect sites for offshore wind farms and ensure the feasibility of projects from a safety, environmental and commercial perspective.

Project development and management
Teams experienced in managing complex marine operations and coordinating contractors.

Installation and commissioning
Expert teams employ rigorous mechanical tests and safety checks to ensure that turbine installation and commissioning is completed to the highest industry standards.

700
SUBSEA COMPANIES

2000+
ENERGY & ENGINEERING COMPANIES

9250+
WIND ENERGY SUPPLY CHAIN BUSINESSES

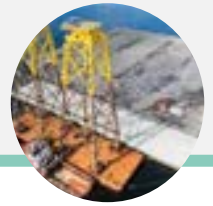
SECONDARY STEEL & ADVANCED MANUFACTURING EXPERTISE

1
CONNECTED OFFSHORE WIND CLUSTER

26 PORTS
ACTIVELY SERVICING WIND, SUBSEA & DECOM ACTIVITIES

COMPONENT REQUIREMENT ESTIMATIONS

1300+
floating foundations

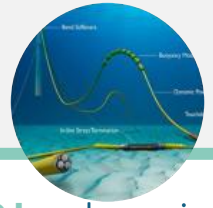


500+
fixed foundations

5400+
blades

1800+ nacelles
1800+ towers

6885+
anchor & mooring systems



2060 km dynamic cable
900 km static arrays
6100 km export cables

FOREIGN DIRECT INVESTMENT
MOMENTUM

Subsea Cables

- **£24.5m** grant for Sumitomo's £350 million subsea cable factory at the Port of Nigg, supporting around 330 jobs

Foundations – ports as enablers

- Targeted public funding at **Ardersier, Nigg & Kishorn** is unlocking the deep-water quaysides and laydown needed for large-scale foundation manufacturing

Anchor & Mooring Systems

- **£6.7m** commercial investment in Subsea Micropiles to develop innovative marine anchor systems, supporting around 100 jobs

Major OEM signals

- **Navantia** – with public sector support are upgrading their Arnish site to enable large-scale offshore wind fabrication
- **Vestas** – intention to invest in a nacelle and hub facility in Scotland, creating a natural anchor for co-located suppliers


SDI
SUPPORT
EVERY STEP OF THE WAY
#SCOTLANDISNOW
SCOTLAND

SDI SUPPORT

A SINGLE POINT OF CONTACT

Provide connections into Scotland's collaborative offshore wind ecosystem

Introductions to the Scotwind main players: developers, ports and main contractors

Introduce you to local companies for potential partnerships

Potential financial assistance for establishing in Scotland

Connections & introductions to Scotland & UK-wide support mechanisms & funding bodies

Property searches & advice to help you find the right facilities fast & help with feasibility studies

Assistance in establishing in Scotland: legal, tax, professional services

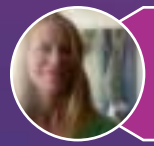
Connect you to industry & academic partners, giving you the opportunity to influence skills

- Aftercare support: committed to seeing you grow and flourish in Scotland by taking the time to understand your needs now and in the future – can help you identify investment, develop your business strategy, upskill staff or improve business processes

INTERESTED!

GET IN TOUCH

Matthew Clark – Inward Investment Specialist
Matthew.Clark@Scotent.co.uk



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+44 141 468 5228

SCOTLAND STAND
HALL 10 – H110

#SCOTLANDISNOW

SCOTLAND

Simply Blue Energy

21st April 2026

Simply Blue Energy

Wind Europe – MRC Meeting

Sam McCloskey, Head of Stakeholder Engagement

Introduction

Simply Blue Energy

Who we are

- Founded in **2011** under the brand Simply Blue Group.
- Backed by **Kansai Electric Power Co., Inc. (“KEPCO”)** one of Japan’s leading integrated energy providers, dedicated to delivering safe, reliable, and sustainable energy solutions.
- This strategic investment marked KEPCO’s first investment involving management participation in an offshore wind developer
- Rebranded as **Simply Blue Energy (SBE**) in 2026.
- SBE is actively developing a significant offshore wind portfolio comprising of **8 GW of floating offshore wind and 4 GW of fixed-bottom** wind projects across multiple markets.
- **Headquartered in Cork, Ireland** with an experienced and dedicated team working from offices in Dublin, Belfast, Newquay, Pembrokeshire, Edinburgh, Bilbao, and Nova Scotia.

Purpose

An Irish offshore wind project developer working globally, with the ocean resources to deliver solutions to the climate crisis.

Simply Blue Energy

Working with the Oceans

Our Mission

We work with the oceans to develop offshore wind projects, that will deliver reliable, renewable energy to meet the world's growing demand and need for clean power. Backed by strong and committed shareholders, we are building the projects needed for a resilient, low-carbon energy future.

We are promoting climate stability, respect for biodiversity and the creation of lasting value for coastal communities and future generations

Our Values

Integrity
We take a long-term view and go that extra mile to do the right thing for our stakeholders, the community and the environment.

Courage
We seek to learn and innovate from new technologies and have the confidence to make things happen.

Passion
We are passionate about developing marine projects that sustain oceans and build local communities.

Diversity
We embrace and respect differences in our people and the community.

Responsibility
We take ownership of what we do, looking to find solutions and add value every step of the way.

About Us

Team of 40+ people
with experience in offshore wind

Offices in
8 countries

Projects in
6 countries

Global
supply chain relationships

Over 8 GW
Offshore wind projects under development (both fixed and floating)

Partnerships with
O&G supermajors & national utilities

Simply Blue Energy

Why Simply Blue Energy

Flexible approach to development of relationships and organisation

Track record reflected in a global development portfolio

Strategic vision integrating technological opportunities and the market context

Team of 40 + talented individuals

Global Offshore Wind Portfolio

Simply Blue Energy

Global Offshore Wind Portfolio

8 GW floating wind
4 GW fixed wind

Our Strategic Partners

- **Kansai Electric Power Co., Inc. (“KEPCO”) and Octopus Energy Generation** > Shareholder
- **TotalEnergies** > Blue Gem Wind (Erebus) UK
- **EDF Renewables** > Emerald & Western Star, Ireland
- **Odfjell Oceanwind & SubSea7** > Salamander Offshore Wind, Scotland
- **Grupo Amper & FF** > Iberblue Wind, Spain & Portugal
- **Archirodon** > ArcoBlue, Greece

Simply Blue Energy - Board of Directors

L to R: Hugh Kelly, Yuki Koshida, David Povall, Chris Gaydon, Makoto Takeuchi and Kazuma Fukai

Update on Ireland / NI Offshore Wind

Simply Blue Energy

Ireland's offshore wind sector

Strengths:

- Exceptional wind resources
- Large maritime area
- Suitable for depths for fixed wind on east and south coast
- Huge resource in deeper west coast waters - floating
- Proximity to strong UK and EU supply chains and export markets

HOWEVER! Progress has been slow….but is picking up in Republic of Ireland

2004: Arklow Bank

- 25MW wind farm (7 turbines)
- Developed by Airtricity (now SSE Renewables) and GE Wind Energy
- World's first commercial offshore wind farm with turbines over 3MW

Phase 1 & 2 Projects

PHASE 1

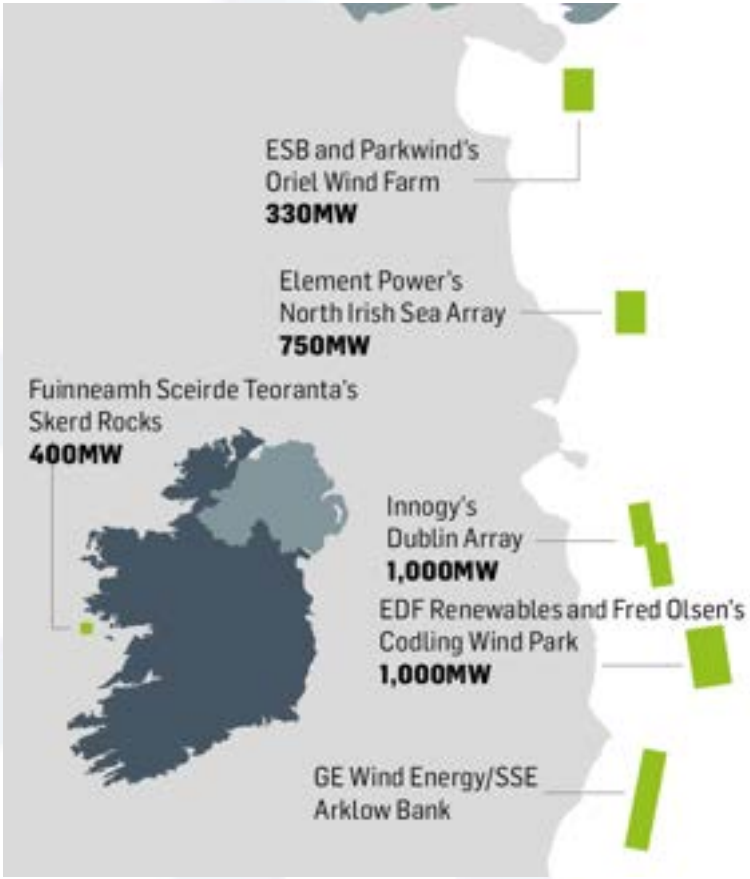
- 6 projects designated as Phase 1 Projects under the developer-led system. Major part of Ireland's 2030 climate and energy obligations
  - Codling: 1,300MW – EDF Renewables and Fred Olsen Seawind
  - Dublin Array: 824MW – RWE and Saorgus Energy
  - North Irish Sea Array; 500MW – Statkraft and CIP
  - ~~Sceirde Rocks: 450MW – Corio~~
  - Oriel Wind Park: 375MW – Parkwind and ESB
  - Arklow Bank Phase 2: 800MW – SSE Renewables
- 2022 – 2023: First ORESS auction awarded 1st four a CfD of €86.05.
- Oriel and Arklow – alternative RtM

ORESS 2.1 (Tonn Nua)

- South Coast DMAP
- ESB & Orsted awarded CfD €98.719 – November 2025

NATIONAL DMAP

- Surveys starting



Irish Time Graphic

SBE on the island of Ireland

Simply Blue Energy

EDF/SBG Joint Venture - Emerald & Western Star

Floating wind in Ireland:

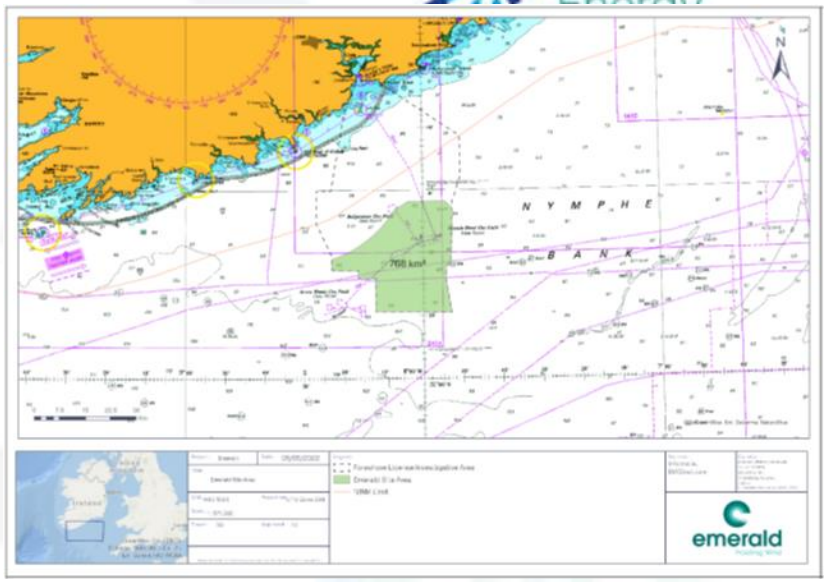
- Majority of Ireland's offshore wind resource is in deeper waters
- Cumulative impacts limits much more development in the Irish sea
- Existing grid capacity and deep water ports off the west coast

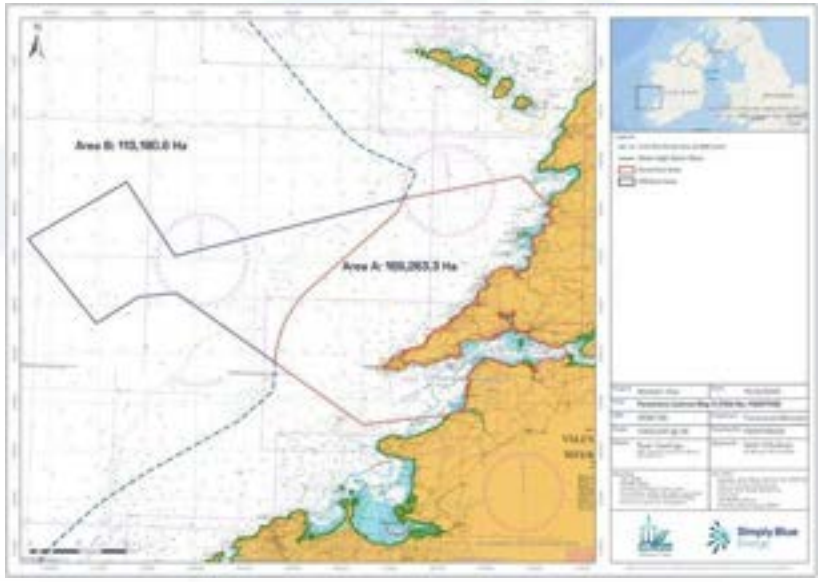
Emerald & Western Star

- Floating Wind Joint Venture with EDF-Renewables in Ireland
- Western Star: 1.35GW off the Shannon Estuary
- Emerald: 1.3GW near the Kinsale Gas Field

Status

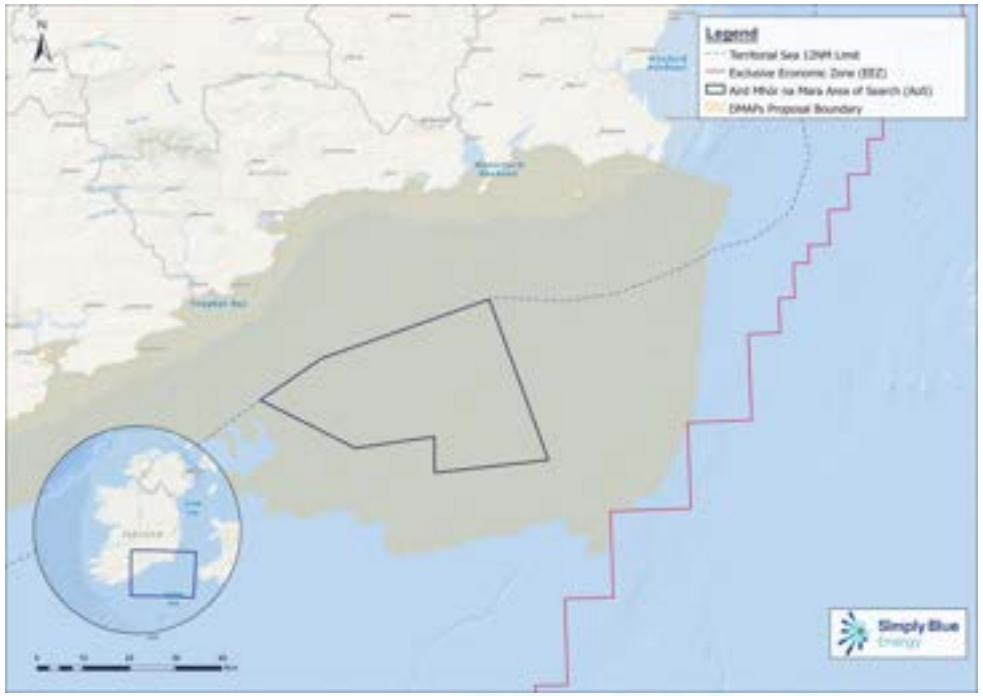
- Initial survey work complete and EIA Scoping report issued
- Switch to Plan-led in 2023 -> awaiting DMAPs in 2027
- Irish FLOW supply chain demonstrator policy in development

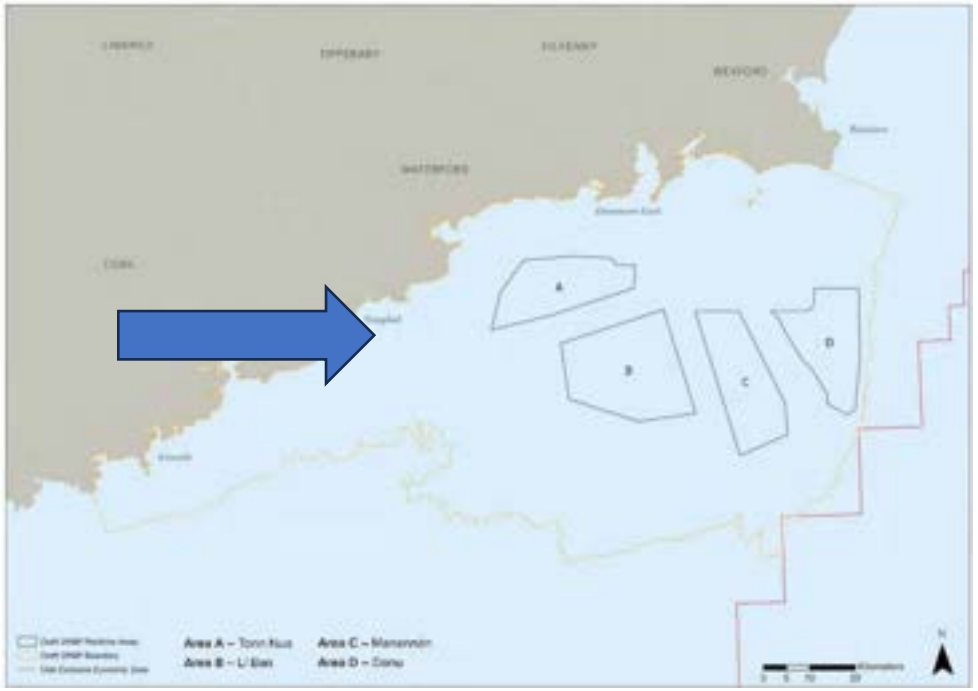




Aird Mhór na Mara

- Up to 2GW of capacity of fixed-bottom wind
- Water depths range from 68-76m (72m average)
- 2023: Initial site screening
- 2024: Overlap with areas within SC-DMAP
- Preliminary engineering studies and commercial development underway
- 2027/8: Site control target

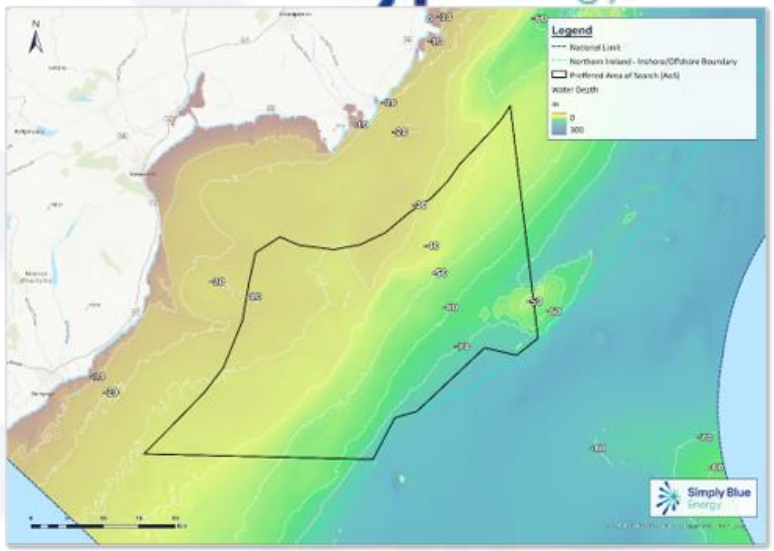




Northern Ireland: Olympic

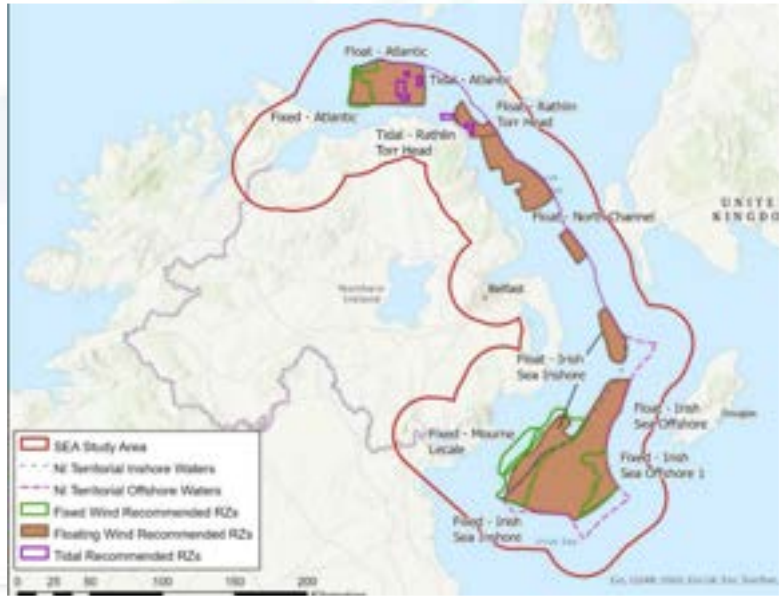
About Olympic

- Began development in 2021
- Site Screening identified up to 2GW of fixed offshore wind capacity off Co. Cown
- Current activities: Metocean and power system studies. Stakeholder and policy engagement



Northern Ireland Policy Development

- Targeting 1GW of offshore wind from 2030
- OREAP SEA / RIAA published in March 2025 – confirmed strong overlap with project site
- Crown Estate leasing round in 2026 (tbc)
- Devolved energy policy & regulation : New renewable support scheme auction 2026, offshore wind date yet to be announced
- Good port infrastructure



How to Engage with the Supply Chain

- Proactive engagement in networks
- Projects with separate entities
  - E.g Blue Gem Wind
- Log onto project websites
- Partner with local companies
  - Local content
- SBE Procurement team – stand 9-B100
- Atlantic Canada
  - Office in Halifax
  - POC – david.trask@simplyblueenergy.com

Contact Us:

info@simplyblueenergy.com

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www.simplyblueenergy.com

Scottish Offshore Wind Ports Alliance

Presented By SOWPA Chair, Iain Sinclair, Port of Nigg

Introduction

The Scottish Offshore Wind Ports Alliance (**SOWPA**) is a progressive and collaborative forum of the country's leading **port locations** and **enabling infrastructure facilities**, targeted at optimising the opportunities from offshore wind.

The forum is represented by leading offshore energy ports across Scotland, which hold expertise across the full offshore wind **value chain**, from **Manufacturing** and **Fabrication**, through to **Marshalling, Assembly**, and **Operations & Maintenance**.

SOWPA is actively developing opportunities to **enhance regional competitiveness**, **drive efficiencies** and **fast-track** the required **expertise** to support the UK's burgeoning offshore wind industry.

348ha

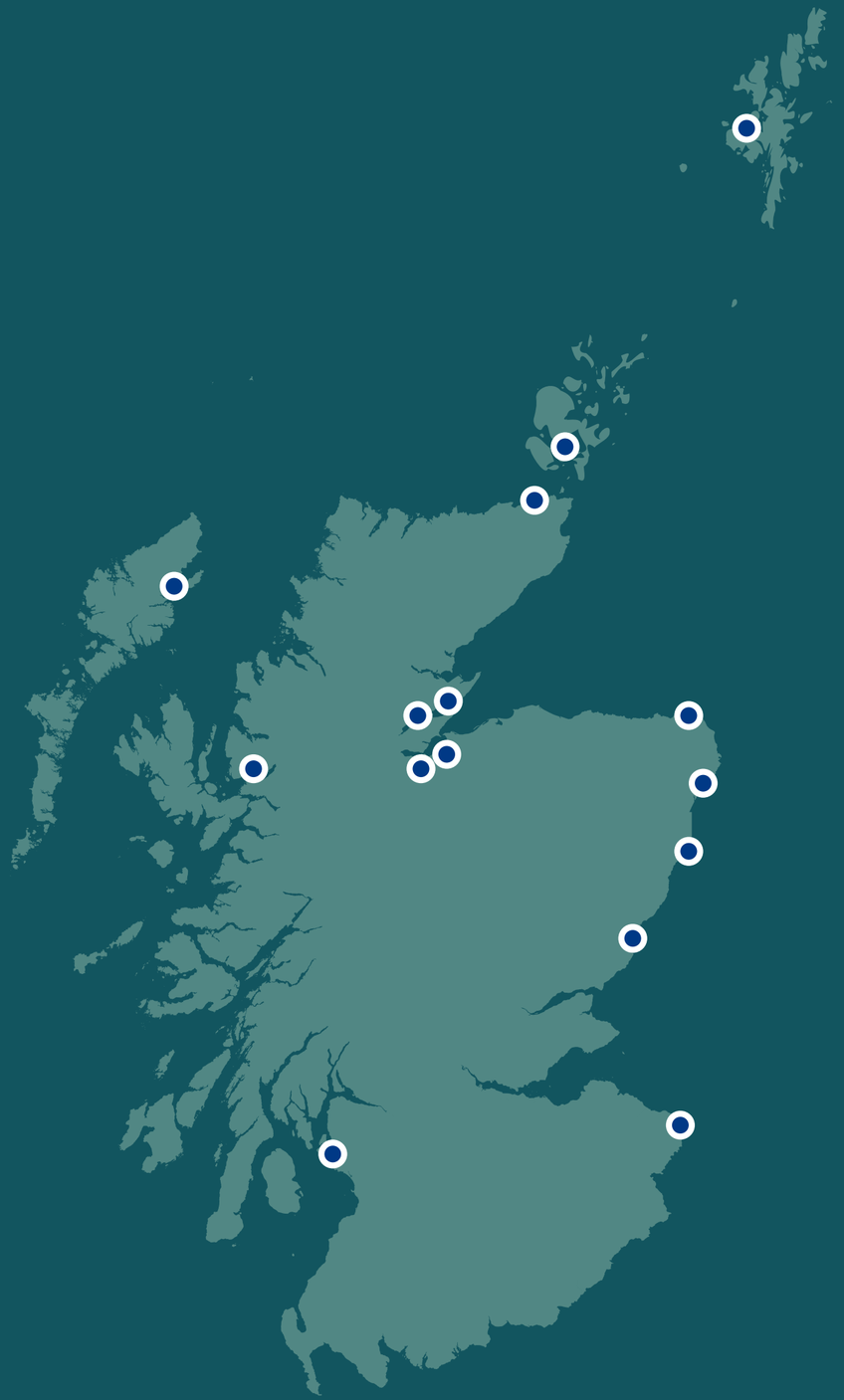
Available laydown space with expansions planned to increase capacity by 46%

24km

Total quayside length with planned developments to increase capacity by 20%

15

Leading Scottish ports actively engaged across the offshore wind value chain

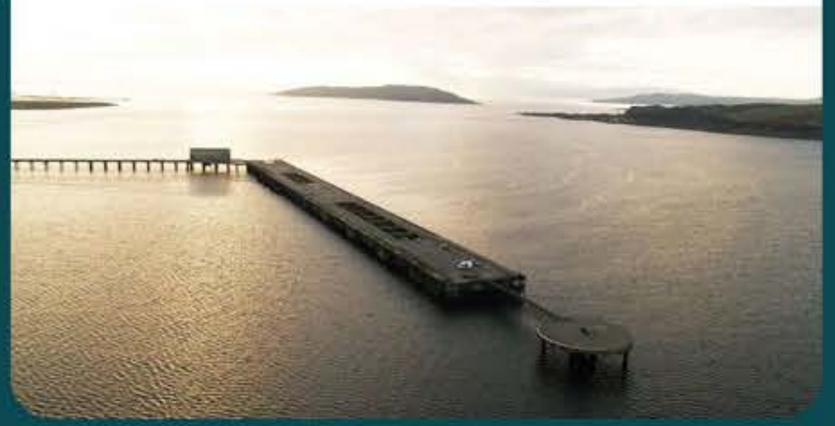


“The Scottish Offshore Wind Ports Alliance brings together our best expertise and capabilities in port operations. This alliance will give us the ability to share experiences and expertise meaning our offer to industry is truly excellent.”

Claire Mack, Chief Executive - Scottish Renewables

Eyemouth Harbour

Peel Ports (Hunterston)



Kishorn Port

Port of Nigg

Lerwick Harbour

Ardersier Energy Transition Facility

Orkney Harbours

Port of Cromarty Firth

Stornoway Port

Port of Montrose

Port of Aberdeen

Fraserburgh Harbour

Port of Inverness

Peterhead Port Authority

Scrabster Harbour

Value Proposition for Offshore Wind

Manufacturing

Assembly

Fabrication

Marshalling

Integration

O&M

Scottish Offshore Wind Ports Alliance

Management Team

info@sowpa.co.uk

The Scottish Offshore Wind Ports Alliance is led by a highly experienced management team, drawn from senior leadership across Scotland's key port infrastructure. Together, they bring deep industry insight and strategic oversight to drive collaboration and support the growth of offshore wind.

- Chair: **Iain Sinclair**, Chief Strategy Officer, Maraen Port of Nigg
- Vice-Chair: **Bob Sanguinetti**, Chief Executive Officer, Port of Aberdeen
- **Alasdair Ferguson**, Group Managing Director, Kishorn Port Ltd
- **Alex MacLeod**, Chief Executive, Stornoway Port Authority
- **Graeme Reid**, Chief Executive Officer, Peterhead Port Authority

Supported By

- **Claire Mack** CEO Scottish Renewables
- **Richard Ballantyne CEO British Ports Association**

scottish renewables

BRITISH PORTS ASSOCIATION


Scottish
Offshore Wind
Ports Alliance
sowpa.co.uk

Offshore Wind in Ireland: Marine Renewables Canada

Justin Moran, Director of External Affairs, Wind Energy Ireland

Wind Europe 22 April 2026

WIND ENERGY IRELAND

windenergyireland.com

Leading Ireland's Clean Energy Future

WIND ENERGY IRELAND | energy storage IRELAND | ireland electrified | RenewableNI

In partnership with: RenewableUK

Our organisation supports 300+ companies across the island on wind, storage and electrification policy

Dave Linehan

Director of Policy & Research
Wind Energy Ireland

Bobby Smith

Director of
Energy Storage Ireland

Anna Conlan

Head of
Ireland Electrified

Mark Richardson

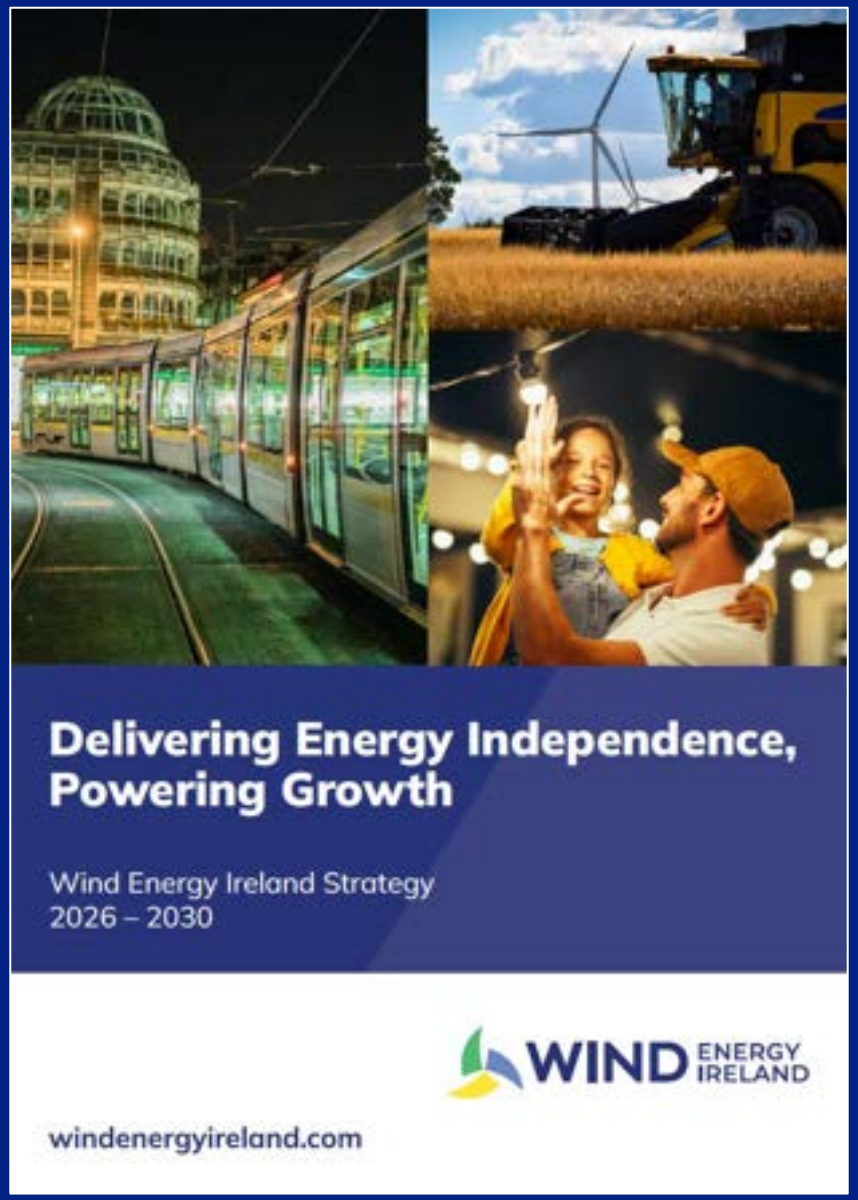
Director of
RenewableNI

WIND ENERGY IRELAND

Representing Over 200 Companies

Covering All Aspects Of Onshore And Offshore Wind

WIND ENERGY IRELAND

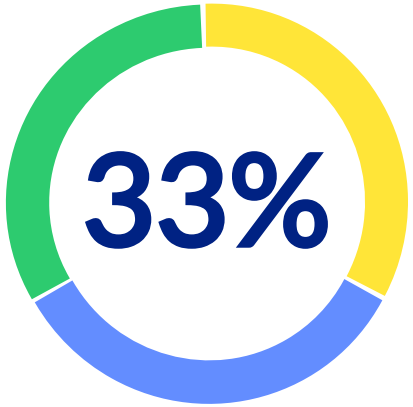


Delivering Energy Independence, Powering Growth

Wind Energy Ireland Strategy 2026 - 2030

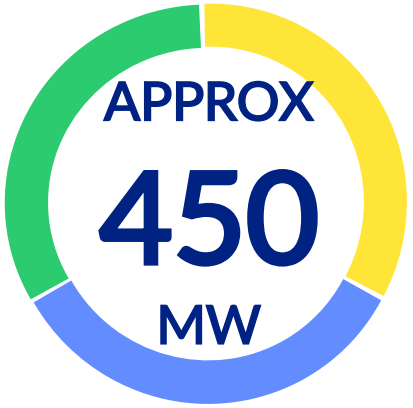
WIND ENERGY IRELAND

2025 – From Concept to Delivery



of Ireland's electricity from wind in 2025

Wind energy saved €1.2 billion in gas costs for Ireland in 2025



of onshore wind farms reached financial close and began construction

Phase 1 wind farm projects now in the planning system

of new onshore wind farms entered the planning system

Competitive second offshore auction held and 900MW contracted

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Offshore Wind Action Plan

How Ireland can accelerate offshore wind delivery

windenergyireland.com

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Wind Energy Ireland Offshore Wind Action Plan

Sets out the key priorities to deliver on Ireland's offshore wind potential

1. **Delivering the Phase One projects** to establish Ireland's offshore wind industry.

2. **Maximising the South Coast Designated Maritime Area Plan (DMAP)**, including progressing Tonn Nua and future development of sites B, C and D.

3. **Accelerating the National ORE DMAP** to provide a long-term pipeline of 15 GW of projects for fixed and floating wind.

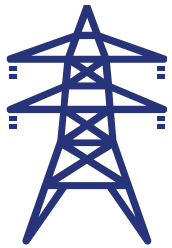
4. **Building vital infrastructure and demand strategies,** including investment in ports, grid capacity and industrial demand to support offshore wind growth.

National DMAP Opportunity

Build the Enablers

Build Customers

- South-East **1GW+ Demand Strategy**
- **GW-Scale** Coastal Green Energy Parks
- Longer-term export opportunity after **domestic electrification**



Build Grid

- Grid capacity is ***the* most critical enabler**
- **Net-Zero Network Plan** – Offshore Grid Bootstraps, Interconnection, & Private Wires which **unlock customers**

Build Ports

- National Ports Policy – **Strategic Ports Investment still needed**
- Prioritise expansion of **at least two ports**

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Government's Offshore Wind Clearing House

Our Taoiseach and Minister have established an Offshore Wind Clearing House to deliver projects

Taoiseach and Minister O'Brien announce establishment of Offshore Wind Energy Clearing House

Key focus areas:

- Ensuring timelines are met across Government
- The planning system & associated resourcing
- Port infrastructure investment & readiness
- Certainty of grid capacity & route-to-market for projects

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Offshore WIND 2026

26 - 27 May 2026

09:30 - 17:00

Clayton Hotel Burlington Road
Leeson Street Upper
Dublin, D04 A318

Deloitte. | ESB | amazon | EirGrid | FLOTATION ENERGY | JERA NEX BP | MASON HAYES & CURRAN | PHILIP LEE

RDS, Dublin, Ireland
21-22
October

windenergyireland.com

NedZero

Offshore Wind in the Netherlands

Engagement between the Netherlands and Canada

Jan Vos – Chairman

WindEurope Madrid | 22 april 2026

NedZero – the brancheorganisation of the Dutch wind energy sector

- 300 member companies and counting
- Onshore- and offshore- wind energy
- Lobby - regional and national
- Networking and knowledge exchange
- Internationalisation

New government

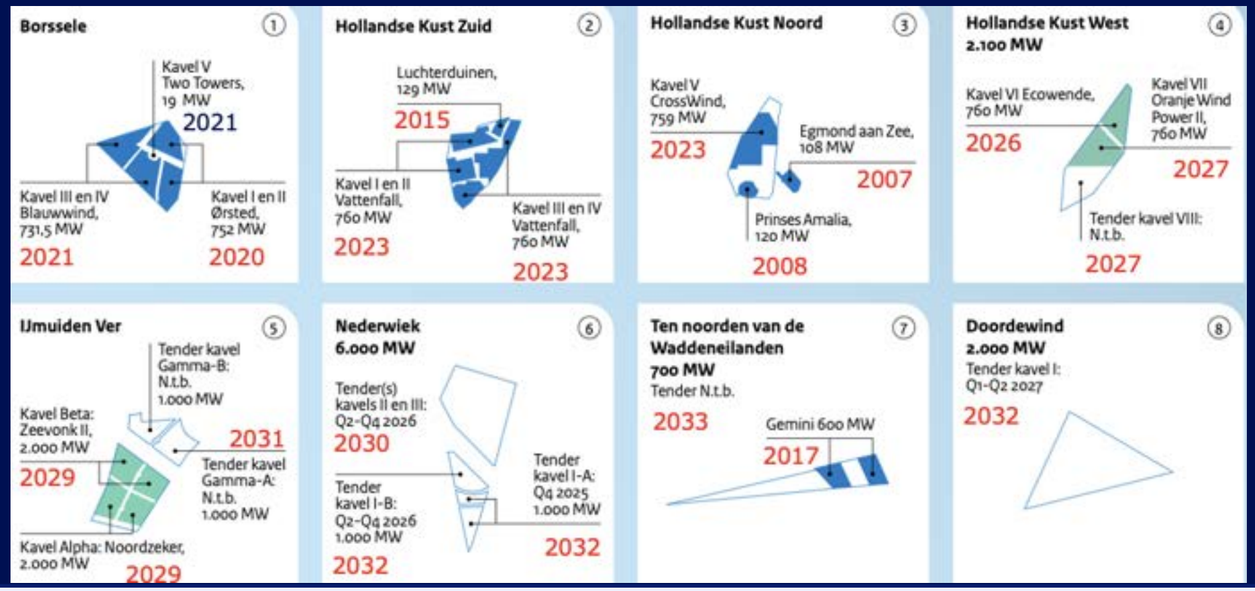
- Long-term funding support for offshore wind projects
- Electrificationof the industry
- Grid congestion crisis act

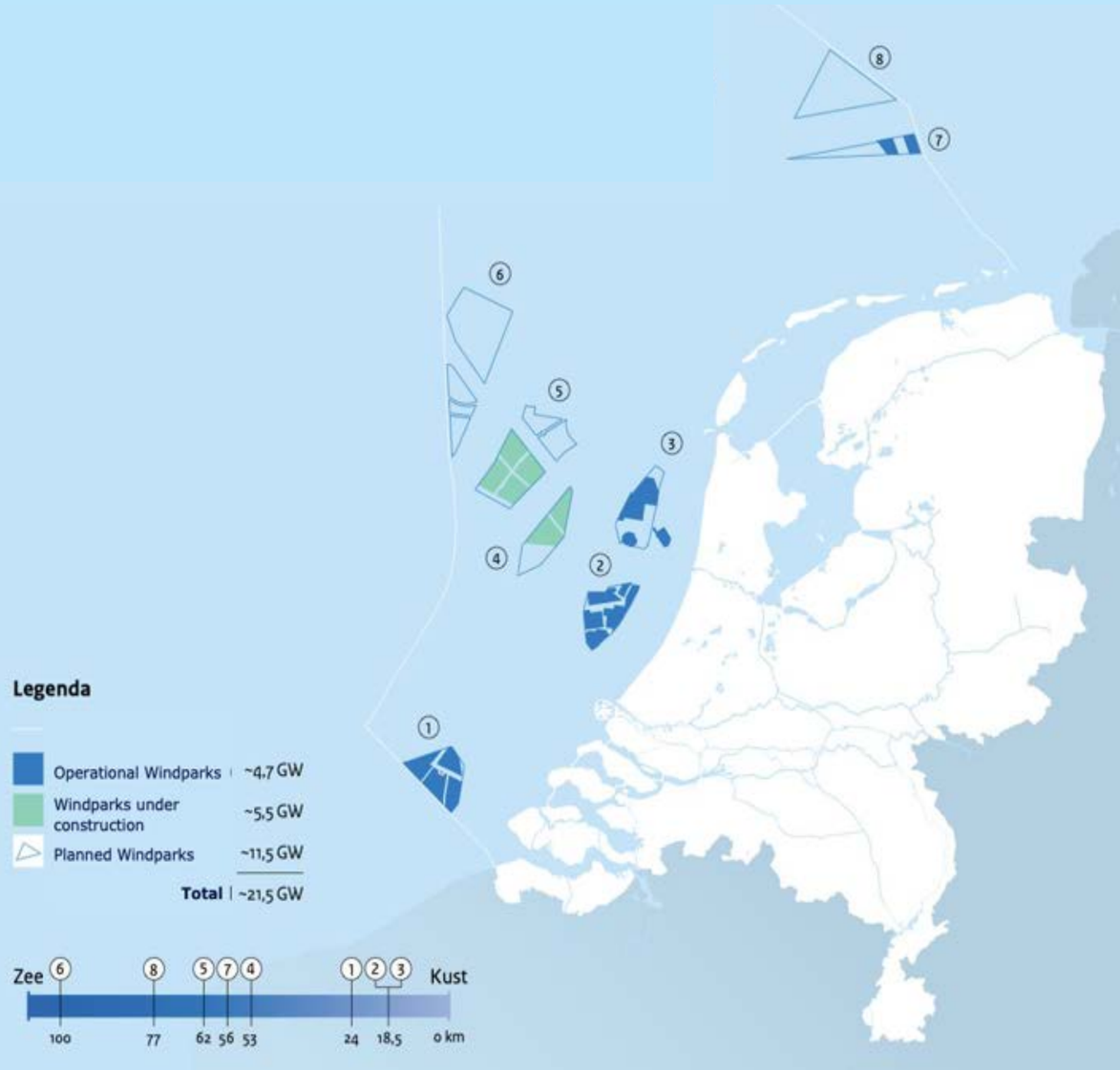
Hamburg declaration

- 300 GW OSW capacity in 2050.
- 10 years realisation of 15 GW/yr
- CfDs as the standard for auctions
- € 1 trillion → 91.000 new jobs
- € 9,5 billion for vessels, port infrastructure and manufacturing;
- 30% LCOE reduction by 2040
- Industrial electrification

Current status of offshore wind in the Netherlands

- Under construction: **1,5** GW
- In operation: **4,7** GW
- 2032 target **21** GW.
- 2040 target: **30–40** GW,
- 2050 target **70** GW





Next steps

- Offshore wind tender 2025 failed
  → Offshore Wind Action Plan
- Offshore wind tender 2026:
  2 plots of 1 GW each (8 Billion EUR)
- From 2027 onwards: CfD mechanism

CfD mechanisms in Europe

Main challenges for offshore wind in the Netherlands

- Industrail electrification
- Business case of offshore wind
- Supply chain and ports capacity
- Grid expansion
- Marine spatial planning.

Strengths of Dutch offshore wind energy sector

- Collaboration in spatial planning:
- Offshore logistics and installation
- Non price criteria for tenders
- Nature inclusive design and operations


NedZero
Thank you for your attention!