

## Short Study

# The Market for Foundation Structures in the Offshore Wind Energy in Europe until 2030 (3<sup>rd</sup> edition)

Technology, Research and Development, Market, Potentials and Competition

- Political and legal framework conditions for offshore wind energy in Europe and EU countries
- Installed and planned offshore wind parks incl. planned and possible fundament types in Europe
- Overview of technological development
- New installation processes
- New manufacturing processes
- Cost reduction potentials
- Logistic concepts and optimization of supply chain
- Market development and potentials
- Trends, chances and risks

The growing offshore wind energy market is facing a range of challenges in the coming years. One in particular is the technological development of foundation structures, enabling the construction of offshore wind parks in water depths of over 50 meters. Likewise, optimization processes have to be developed, in order to reduce costs. Due to stringent requirements on noise emissions greater emphasis will have to be put on new installation processes.

A number of technological solutions already exist: monopiles, tripods, jackets, tripiles and heavy weight foundations. Based on experience and empirical values those are constantly further developed or in some cases deferred. New developments are for example swimming foundations, suction foundations, bionic foundations or delta hybrid foundations. A comparison of the new developments shows that particular importance is given to the topics operational capability (e. g. load capacity), manufacturing and installation costs, as well as noise emissions during installation.

Ocean currents, waves and extreme wind conditions, as well as heavy wind turbines of up to 850 tonnes put exceptionally high dynamic strains on the steel and concrete structures. Therefore, the demands on foundation structures are specifically high. The

extreme weather conditions at sea also pose a great challenge on the construction of offshore wind parks. According to the interviewed experts, new logistic concepts for wind turbine construction will have to be developed in order to reduce costs and at the same time increase safety.

The planned new edition of the study „The Market for Foundation Structures in the Offshore Wind Energy in Europe until 2030” responds to the rapid pace of the developments in the market. It provides a current overview of e. g. specific data, fields of application, capacity growths as well as advantages and disadvantages of available types of foundation structures in the market. Moreover, the study points out future opportunities and risks in the international market.

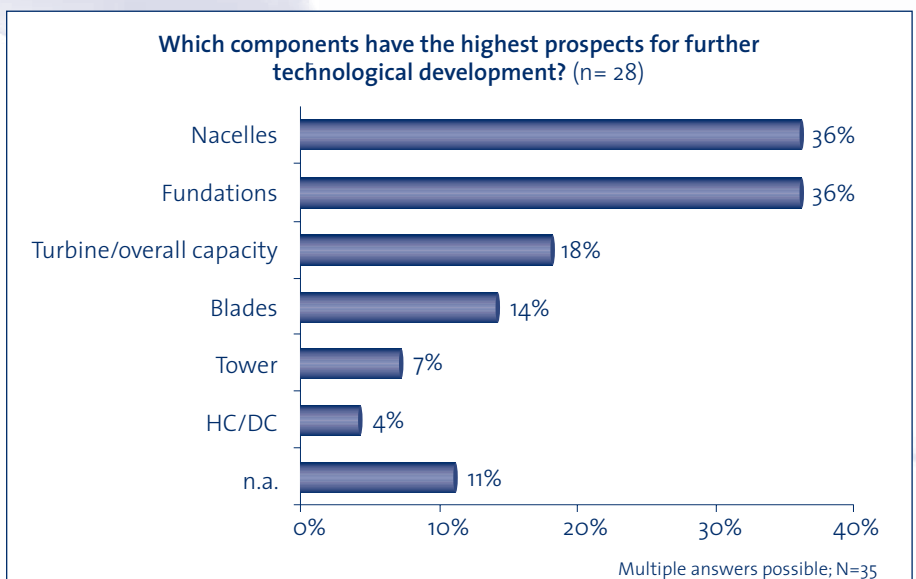


Figure from 2<sup>nd</sup> edition: One out of three interviewees attributes the highest technological development potential to the foundation structures (Source wind:research, 2012)

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## Contents of the study

<b>1 Management Summary</b>	6.2 Market development until 2030 by fundament types
<b>2 Basics</b>	6.2.1 Belgium
2.1 Introduction	6.2.2 Denmark
2.2 Design and contents of the study	6.2.3 Germany
2.3 Aims and benefits of the study	6.4.4 Finland
2.4 Methodology	6.4.5 France
2.5 Selection of countries	6.4.6 Ireland
	6.4.7 Netherlands
	6.4.8 Norway
	6.4.9 Sweden
	6.4.10 United Kingdom
<b>3 Framework conditions</b>	
3.1 Europe	
3.2 Country profiles	
3.2.1 Belgium	
3.2.2 Denmark	
3.2.3 Germany	
3.2.4 Finland	
3.2.5 France	
3.2.6 Ireland	
3.2.7 Netherlands	
3.2.8 Norway	
3.2.9 Sweden	
3.2.10 United Kingdom	
<b>4 Planned and installed offshore wind parks in Europe</b>	
4.1 Belgium	
4.2 Denmark	
4.3 Germany	
4.4 Finland	
4.5 France	
4.6 Ireland	
4.7 Netherlands	
4.8 Norway	
4.9 Sweden	
4.10 United Kingdom	
4.11 Summary	
<b>5 Technologies and concepts for foundations of offshore wind turbines</b>	
5.1 Introduction	
5.2 Installation and installation technologies	
5.3 Manufacturing and distribution of foundation structures	
5.4 Fundament types	
5.4.1 Monopiles	
5.4.2 Tripods	
5.4.3 Jackets	
5.4.4 Tripiles	
5.4.5 Heavy weight foundations	
5.4.6 Future development	
<b>6 The market for foundation structures of offshore wind turbines until 2030</b>	
6.1 Introduction	
	7 <b>Trends, chances and risks</b>
	7.1 Trends
	7.1.1 General technology trends
	7.1.2 General economic trends
	7.1.3 Trends in renewable energies/offshore wind energy
	7.1.4 Political trends
	7.1.4.1 ... in Belgium
	7.1.4.2 ... in Denmark
	7.1.4.3 ... in Germany
	7.1.4.4 ... in Finland
	7.1.4.5 ... in France
	7.1.4.6 ... in Ireland
	7.1.4.7 ... in the Netherlands
	7.1.4.8 ... in Norway
	7.1.4.9 ... in Sweden
	7.1.4.10 ... in the United Kingdom
	7.2 Chances and risks
	7.2.1 ... in Belgium
	7.2.2 ... in Denmark
	7.2.3 ... in Germany
	7.2.4 ... in Finland
	7.2.5 ... in France
	7.2.6 ... in Ireland
	7.2.7 ... in the Netherlands
	7.2.8 ... in Norway
	7.2.9 ... in Sweden
	7.2.10 ... in the United Kingdom
	<b>8 Outlook</b>
	8.1 The market for foundation structures for offshore wind turbines after 2030
	8.2 Repowering offshore wind turbines
	<b>9 List of figures and tables</b>
	9.1 List of figures
	9.2 List of tables

The study contains approximately 250 pages. The content may be subject to change.