**DOCKETED**

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<tr>
<th><strong>Docket Number:</strong></th>
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<tr>
<td><strong>Project Title:</strong></td>
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<tr>
<td><strong>Document Title:</strong></td>
<td>GLOBAL OFFSHORE WIND MARKET - The Importance of California for US Floating Technology</td>
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<tr>
<td><strong>Description:</strong></td>
<td>Presentation by Ross Tyler, Business Network for Offshore Wind</td>
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<tr>
<td><strong>Filer:</strong></td>
<td>Raquel Kravitz</td>
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<td><strong>Organization:</strong></td>
<td>Business Network for Offshore Wind</td>
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GLOBAL OFFSHORE WIND MARKET—
The Importance of California for US Floating Technology
OUR IMPACT

6,070
INDIVIDUALS BROUGHT TOGETHER
FROM OVER 900
DIFFERENT COMPANIES

11
STATES

42
DIFFERENT
NETWORKING EVENTS

318
MEMBERS

25%
A DIFFERENT VOICE

524
CATEGORIES FOR PRODUCTS
AND SERVICES

1197
COMPANIES ENROLLED
FUTURE—2050

Cumulative installed capacity (GW)

Global offshore wind - REmap Case

2017: 18.72 GW

2050: 521 GW

Image credit: IRENA, Offshore innovation widens renewable energy options
The global pipeline capacity grew by 42 GW in 2018 to reach 272 GW.

The increase in pipeline capacity is attributed to many new Asian projects that recently entered the planning phase.
BNEF and 4C Offshore forecast China will deploy between 41 and 84 GW by 2030 which is likely to shift market dynamics.

Forecasts predict European developers will build projects at a similar rate relative to today, with Europe holding about 47% of the total installed global offshore wind capacity in 2030.
SUPPLY CHAIN CONSIDERATIONS

Similar to Fixed Bottom Structures—Towers, Turbines and Blades
Unique to Floating—

PLATFORM/HULL
- different designs and materials e.g. steel or concrete steel combination

MOORING LINES
- chain or synthetic

ANCHOR SYSTEMS

DYNAMIC SUBSEA CABLES
- array and export
SUPPLY CHAIN DRIVERS

- **x1**
  - Buy and import
  - PORTS: Water side acreage with good water access

- **x1,000**
  - Make
  - EQUIPMENT: Heavy lift cranes
  - PEOPLE: Trained and skilled

OFFSHOREWIND.ORG
1 MILLION CURRENT
EVs IN THE US

7 MILLION BY 2025

18 MILLION BY 2030

6.4 GWs
CORPORATE PPAs IN 2018

$80b
will be spent on EV Infrastructure by 2025, leading to the development of 230 GWs of charging capacity

85%
Energy demand could increase by as much as 85% by 2050

H₂

New Green Hydrogen Market

FUTURE DEMAND
ROSS TYLER

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