

The logo for Ramboll, featuring the word "RAMBOLL" in a bold, white, sans-serif font. The letter "O" is stylized with a blue checkmark-like shape inside it. The logo is set against a white rounded rectangular background.

RAMBOLL

Bright ideas.
Sustainable change.

The current challenges for OFW in Germany and France

Supply chains, financing and embedding
sustainability criteria

WindEnergy 2024 | 24.09.2024 | Susanne Leidescher



Agenda

Global
challenges

01

Challenges in the German and
French offshore wind market

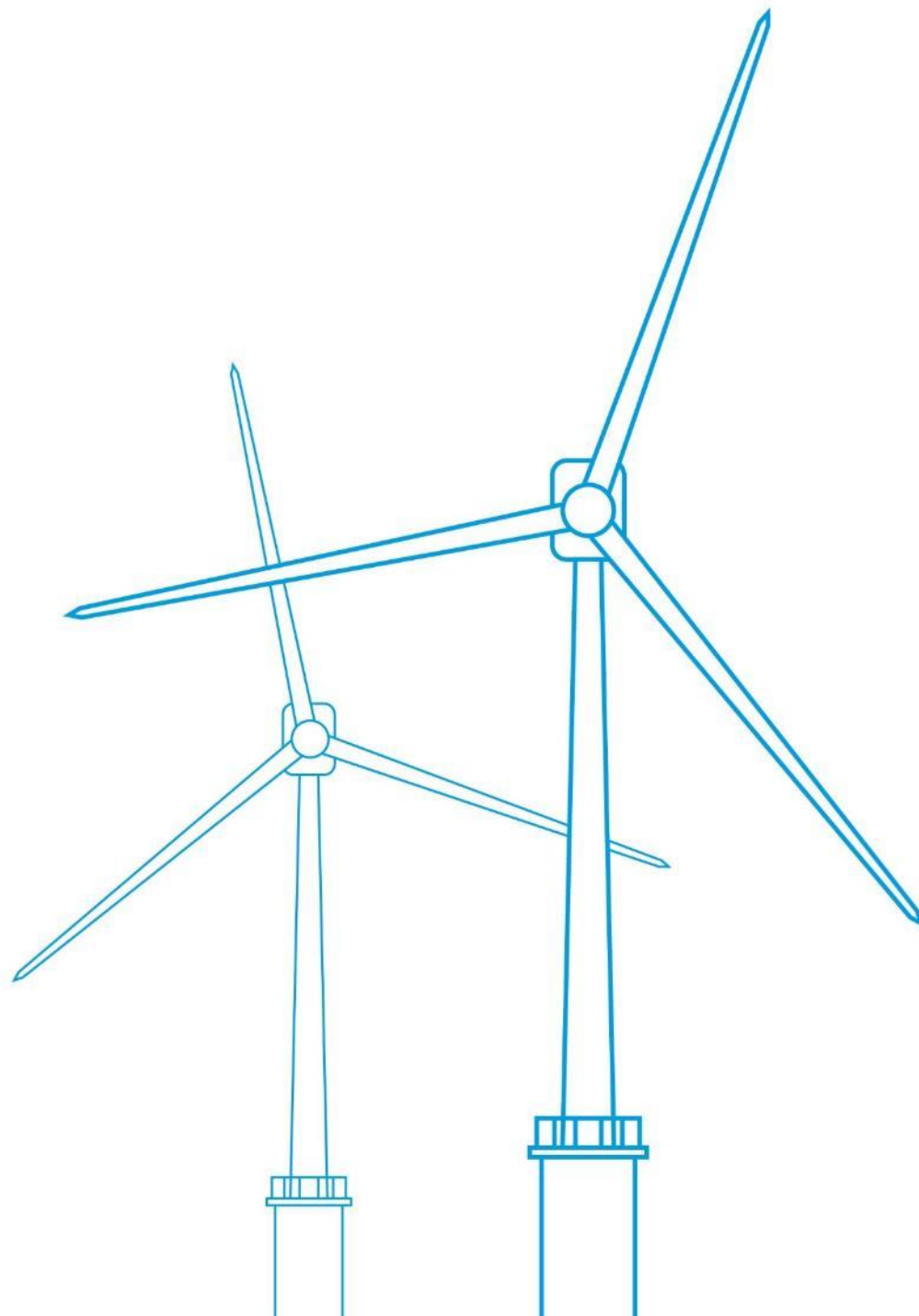
02

Remaining
challenges and
recommendations

03

World-leading Wind Consultant

- Independent Wind engineering consultancy since 1989
- Global presence in all established and emerging markets
- Multidisciplinary services – from consulting to deep engineering
- Technology independent
- One of the green transition front-runners working on OFW-to-X

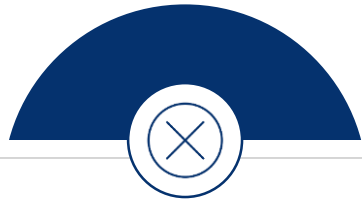


700+
Wind
experts

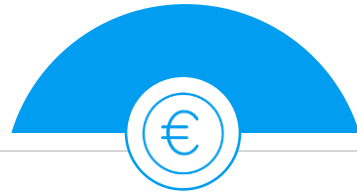
70%
Global OFW
farms

+35
countries

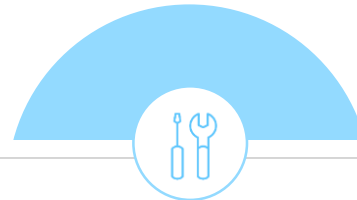
We see similar challenges for project realization in multiple markets worldwide



Less projects reaching Final Investment Decision (FID)



Increased Cost of Capital



Increased CapEx due to macroeconomic challenges



Global offshore wind targets exceeds capabilities of supply chain

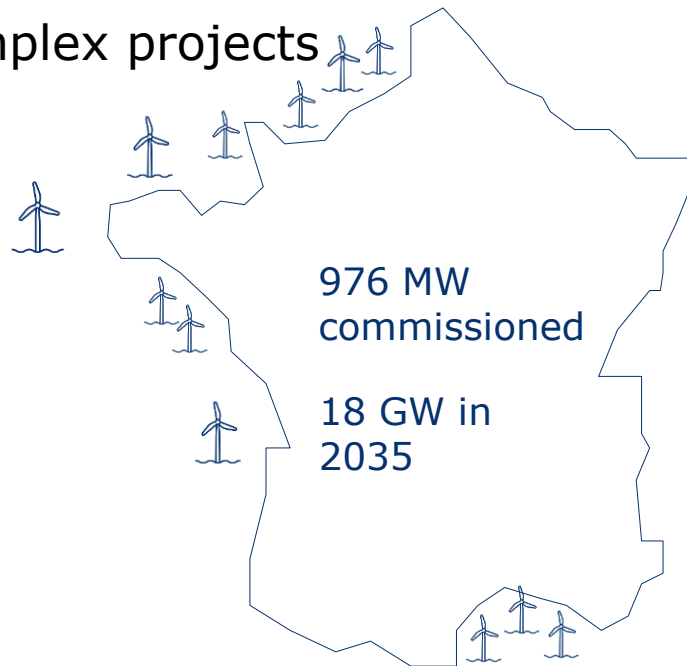


Auction schemes focusing on price and 'negative bidding'

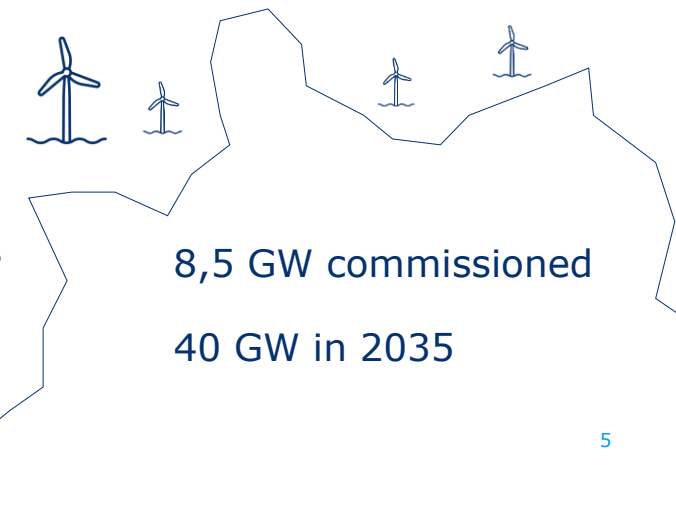
Unclear signals from governmental bodies have delayed the actions for meeting the ambitious targets



- Lengthy permitting and court appeal processes has kept projects in the development phase of many years
- Technically complex projects



- Slow growth period due to transition from developer led model to auction format
- Bankruptcy of several local German companies
- German Offshore Wind Energy Act led to ambitious targets
- Wind grid connection delays



Despite reduced risk premiums for offshore wind projects, challenges remain to meet industry and climate goals

Remaining challenges



- Material demand for meeting global Wind and climate targets
- Prognosed supply chain bottleneck in 2026
- Sustainable and foresighted project realization
- Competition from abroad

Recommendations



- Reducing uncertainties for developers by streamlining permitting regimes across markets
- Reducing the Cost of Capital with financial instruments
- Industry-wide information sharing
- Non-price auction criteria for a diverse auction scheme
- Enhancement of transparency in supply chains
- Increase local content

How to reach out



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