

# Kansen en valkuilen

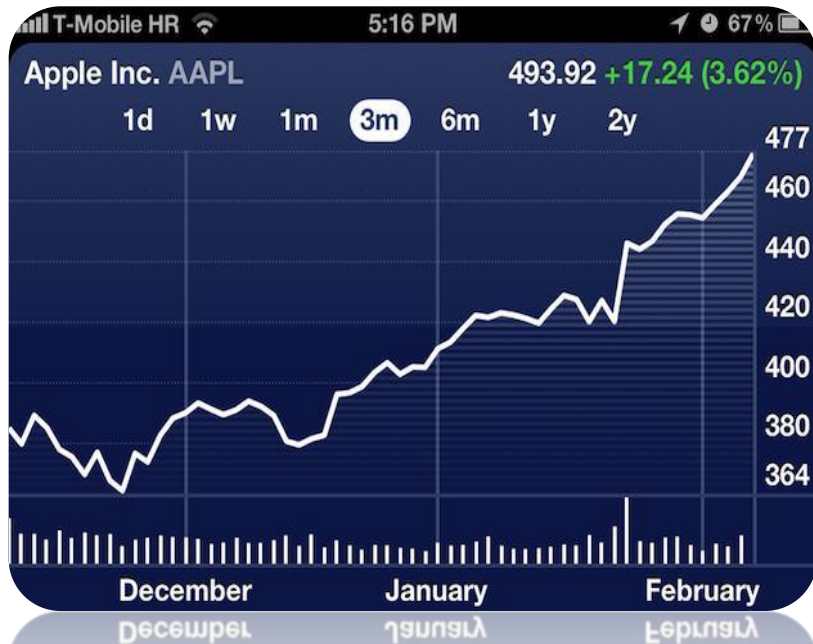


in de offshore windindustrie

Bas Dorpmans  
Bluestream Offshore



Hetzelfde?

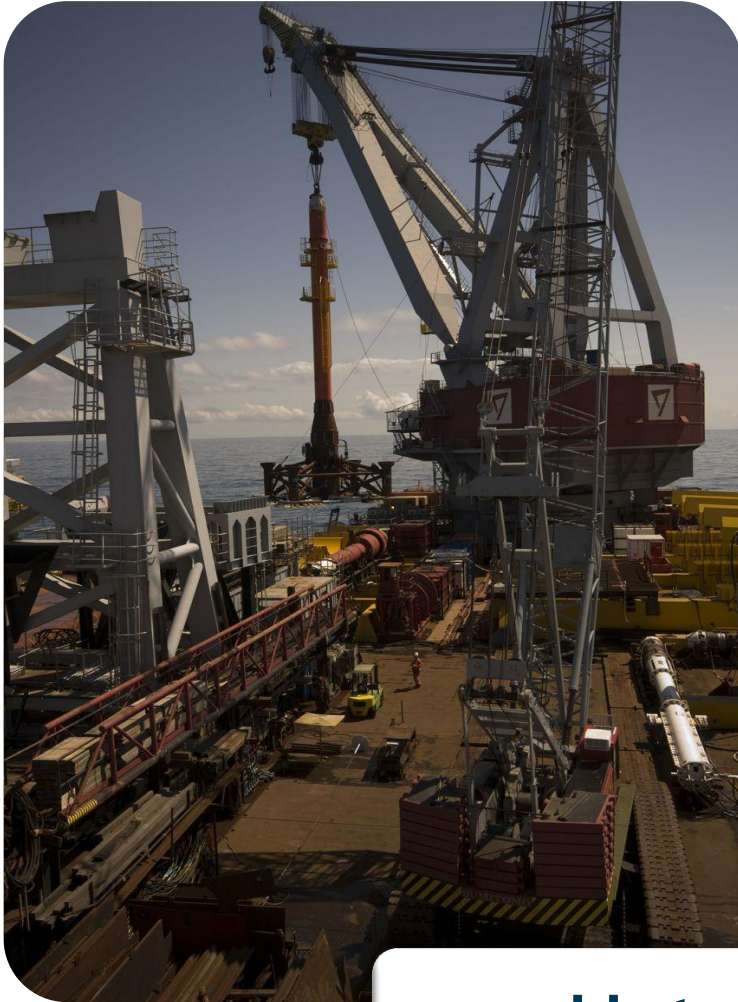


Hetzelfde?

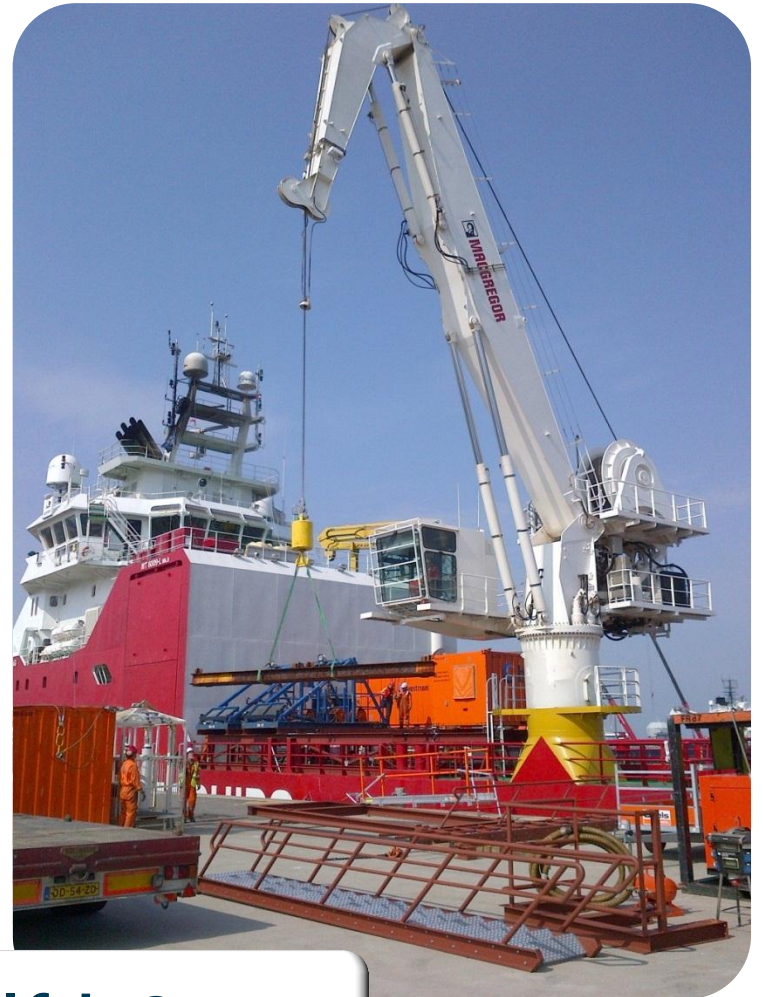


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Hetzelfde?



Hetzelfde?

## Inhoud

1. **Introductie Bluestream Offshore**
2. **Kansen en valkuilen in Offshore Wind**
3. **Afsluiting**



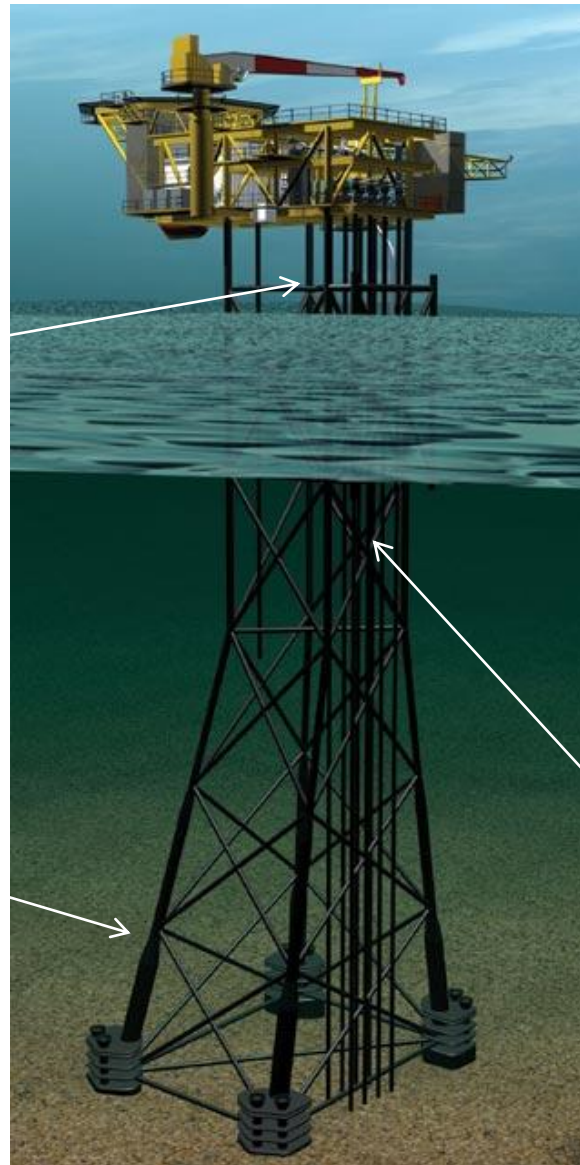
## Introductie



Dienstverlener



# Introductie



# Introductie

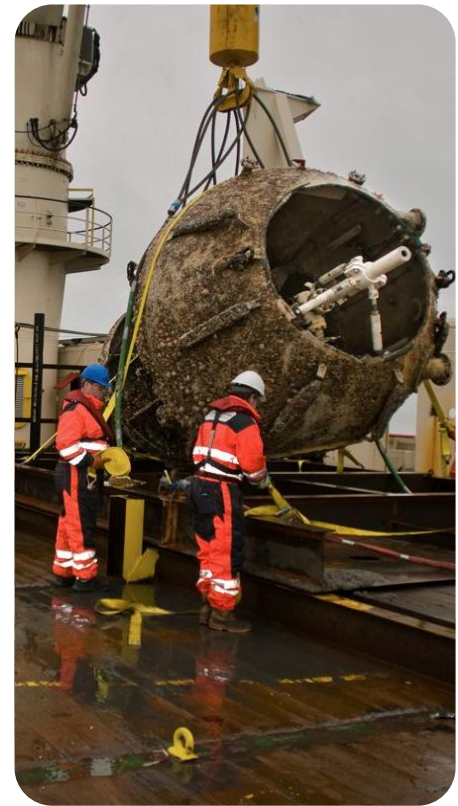
Installatie



O&M



Ontmantelen





# Introductie

## Installatie

## O&M

## Ontmantelen

Seaway Heavy Lifting  
offshore installation



Geotechnical Offshore Contractor

GDF SUEZ



MARINE CONTRACTORS

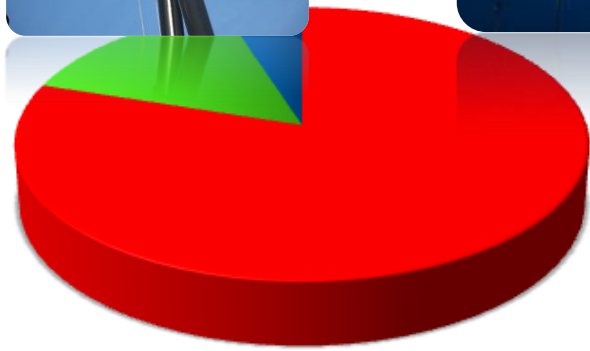
Seaway Heavy Lifting  
offshore installation



SCALDIS  
SALVAGE & MARINE CONTRACTORS N.V.



# Introductie



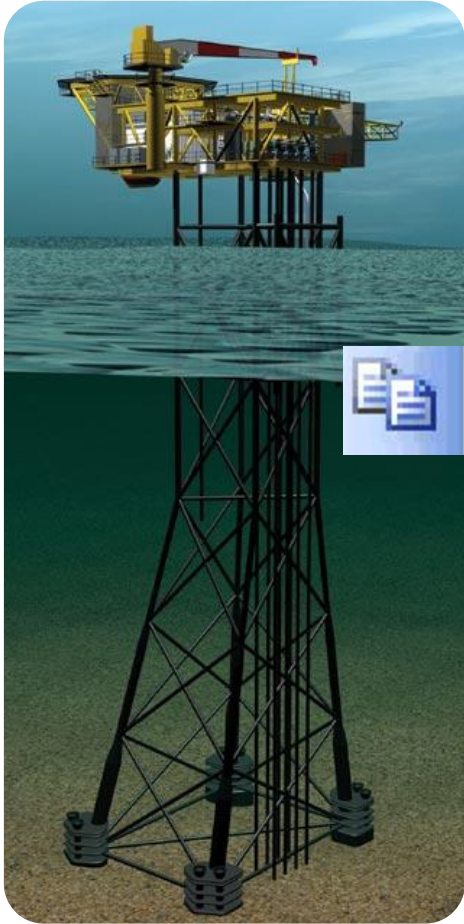
2010



2012

- Oil and Gas
- Offshore Wind
- Onshore

# Kansen & valkuilen



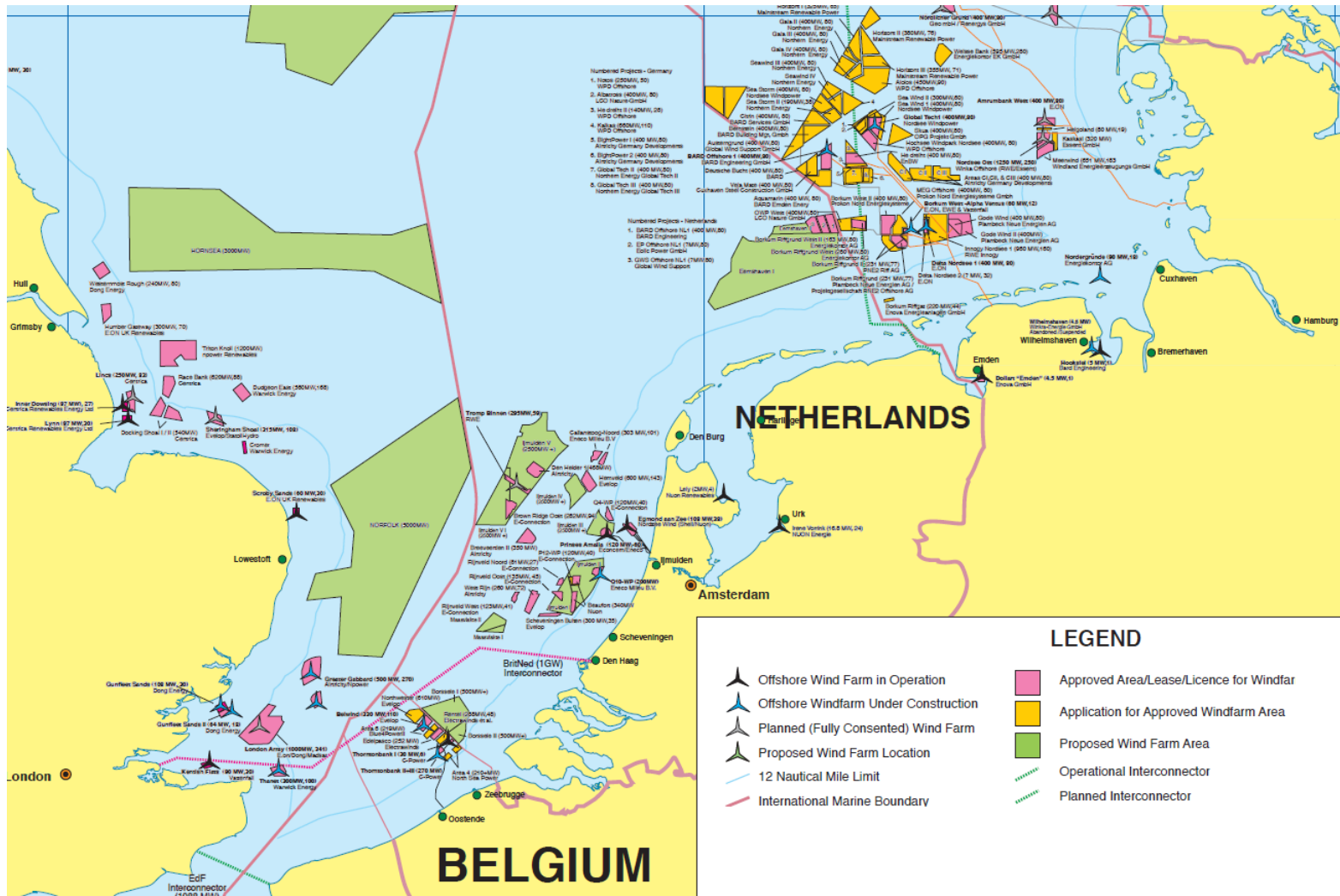
Copy



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# Kansen & valkuilen





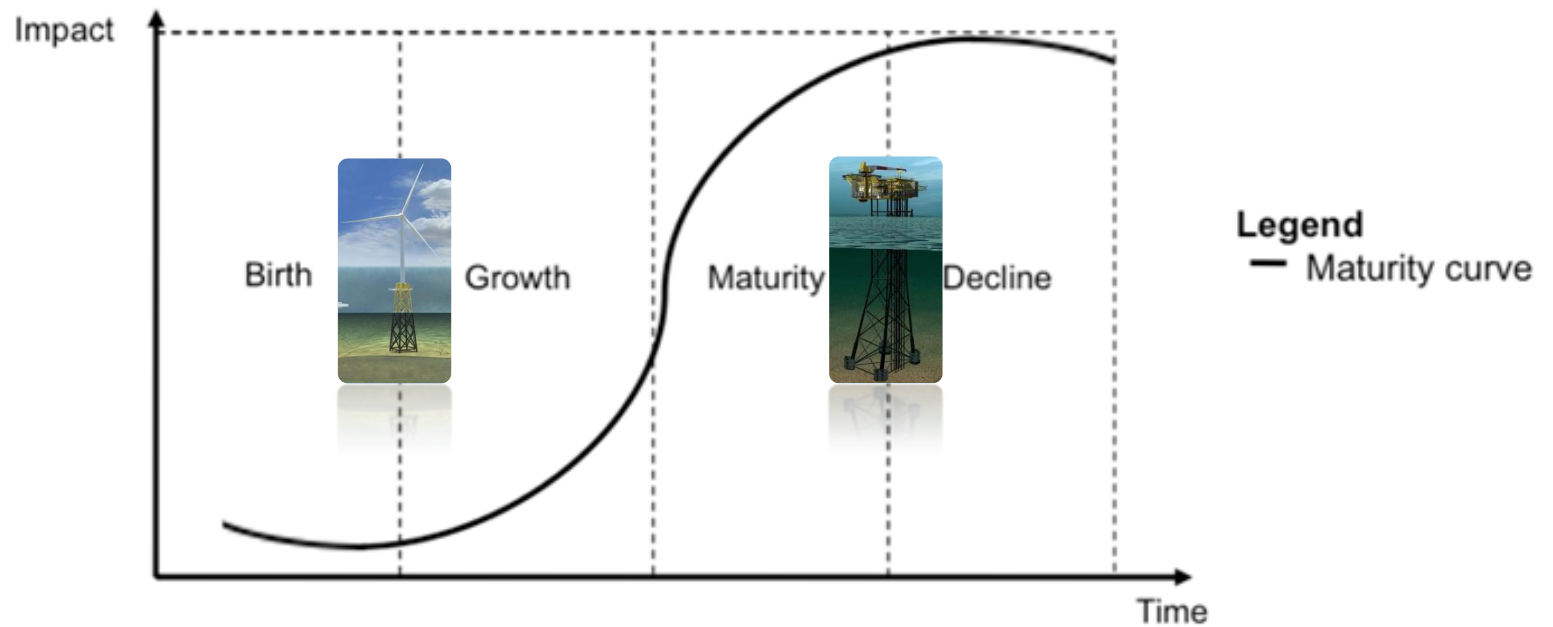
## Kansen & valkuilen

# Follow the Money



# Kansen & valkuilen

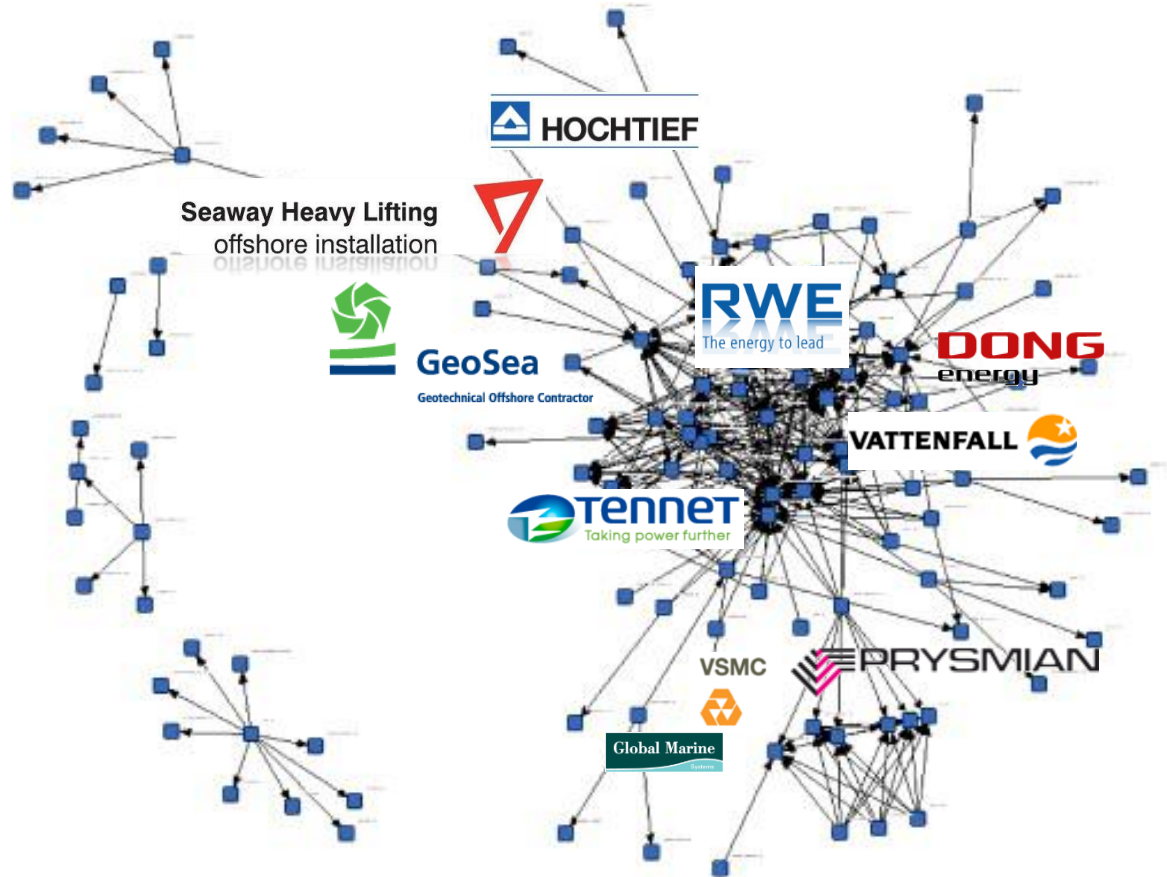
## Industry Life Cycle analysis



Source: Steven Klepper.

# Kansen & valkuilen

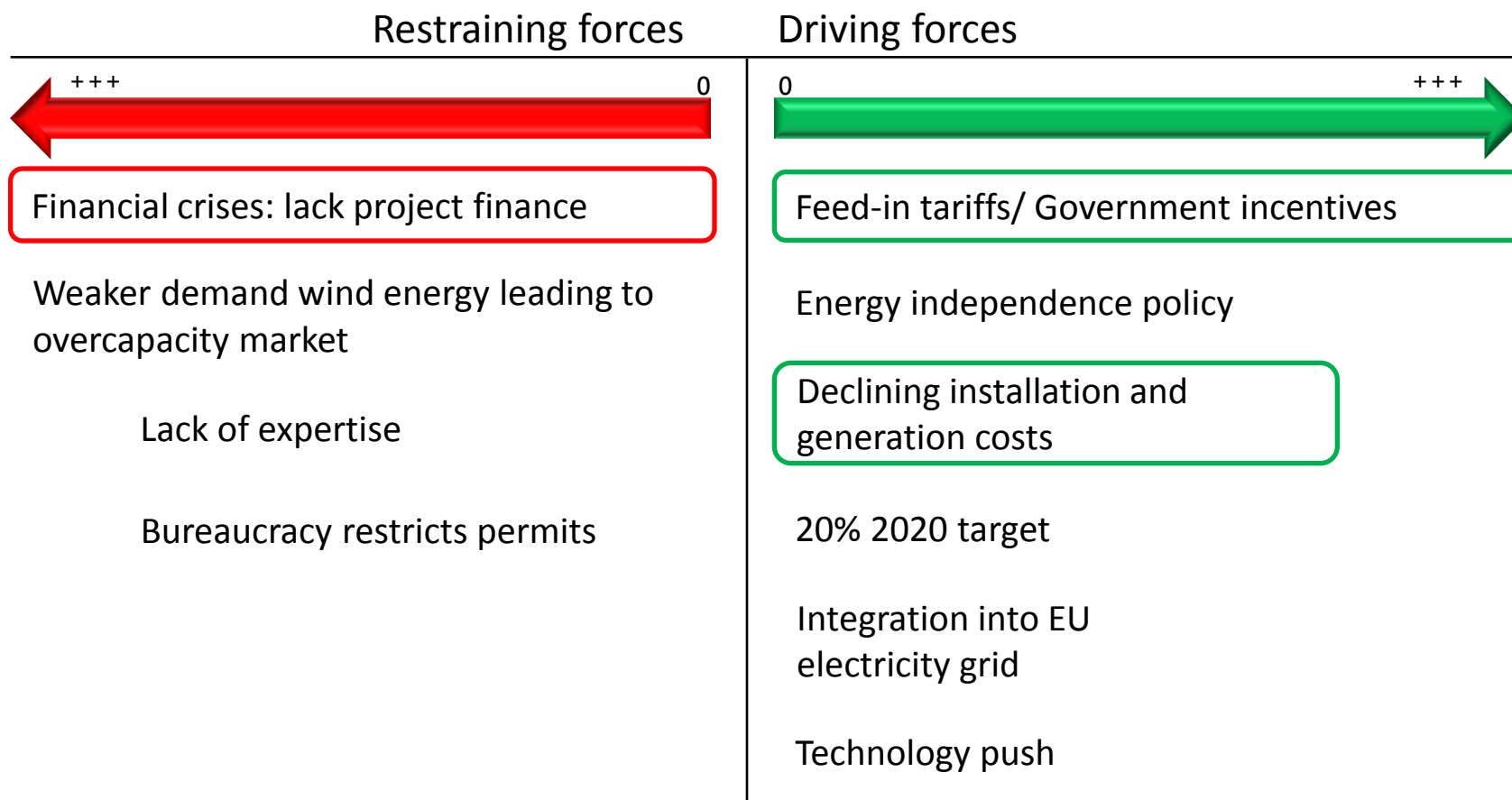
NORTHERN NETHERLANDS  
OFFSHORE WIND





## Kansen & valkuilen

### Force Field Analysis



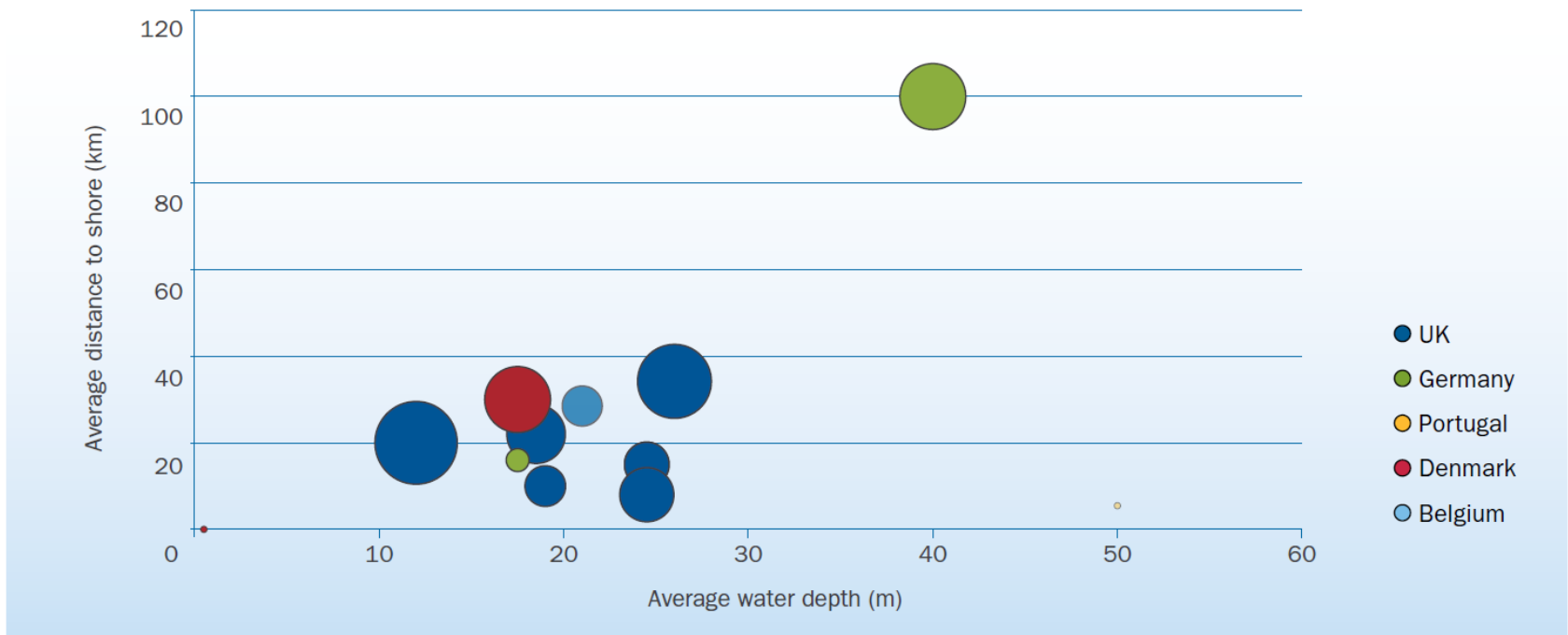
## Kansen & valkuilen

	Nederland	Duitsland	Engeland	Denemarken	België
MWh prijs	ca € 170,- (15 jr incl kabelkosten)	ca € 150,- (12 - 15 jr excl kabelkosten)	ca € 80,- (20 jr incl kabelkosten exclusief opbrengst elektriciteit)	ca € 140,- (eerste 20TWh, exclusief kabelkosten)	ca € 100,- (20 jr, inclusief kabelkosten, exclusief opbrengst elektriciteit)
% NL subs	100	105 <sup>6</sup>	105 <sup>7</sup>	97 <sup>8</sup>	121 <sup>9</sup>

Source: Ministerie van Economische zaken, landbouw en Innovatie. Kamerbief dd 30 januari 2012

## Kansen & valkuilen

FIG 6: AVERAGE DISTANCE TO SHORE AND WATER DEPTH OF OFFSHORE WIND FARMS<sup>2</sup>

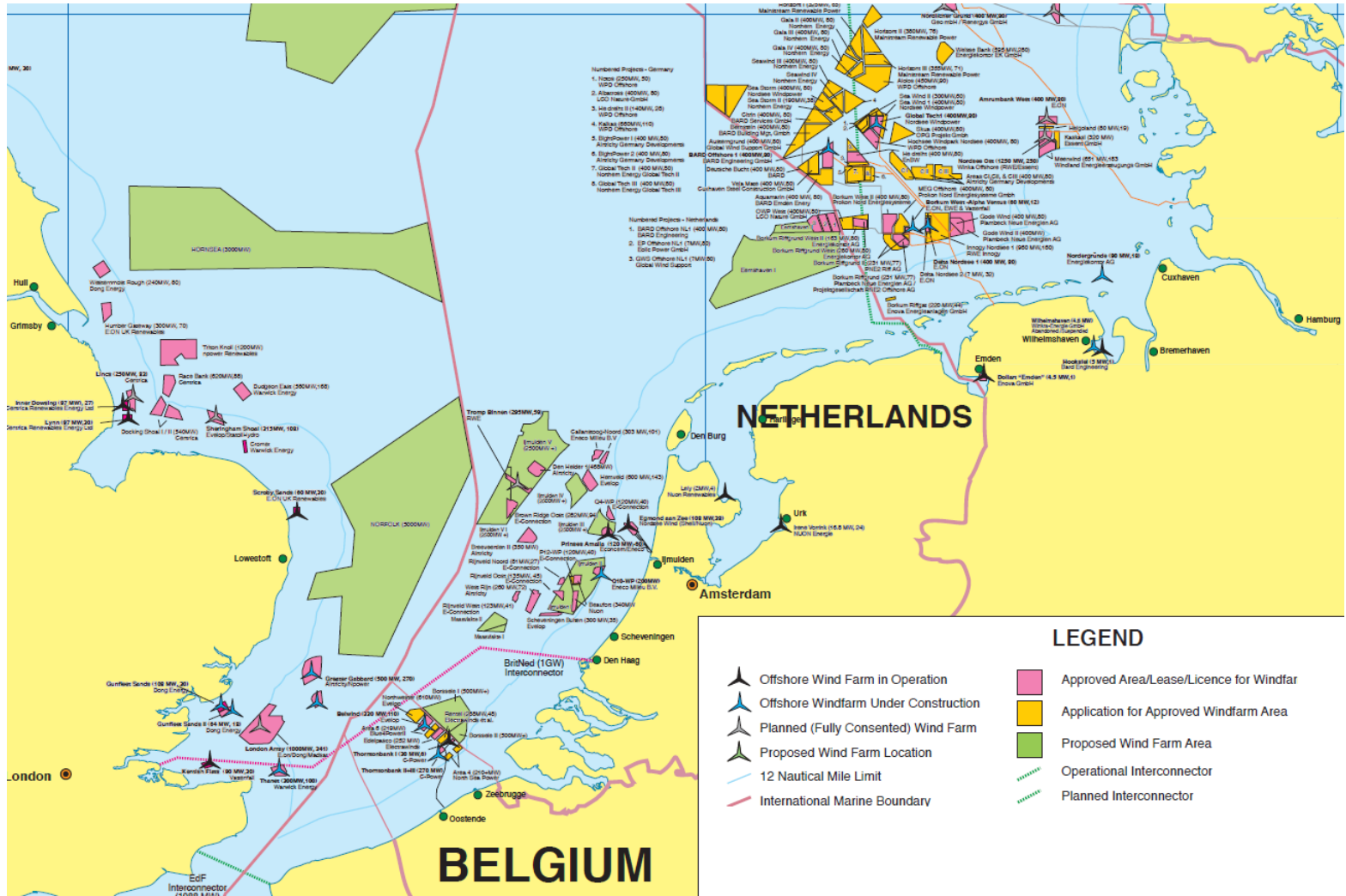


<sup>2</sup> Includes only wind farms which had turbines fully grid connected during 2011

Source: EWEA: The European offshore wind industry key trends and statistics 2011



# Kansen & valkuilen



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## Situation:

- Wind energy is one of the largest renewable energy sources
- DONG is the world leader within offshore wind generation
- DONG has a goal of 85% green energy by 2040

## Complication:

- There is a burning need for sustainable solutions
- Wind farms are asset heavy and require enormous investments
- Financing for this purpose is extremely difficult to obtain

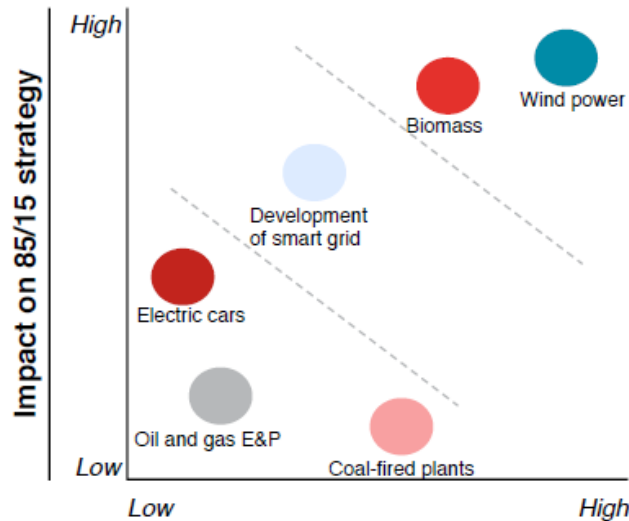
## Question:

- How can DONG Energy leverage its existing capabilities in order to profitably lead the next revolution in the green energy sector?

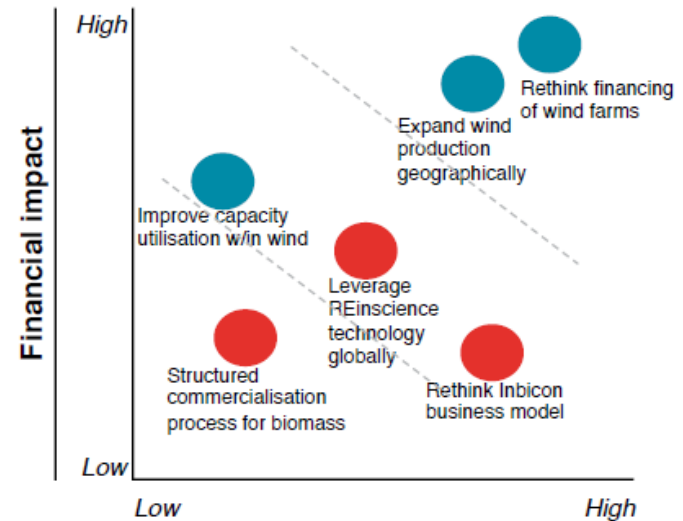


**By pioneering new methods of financing, DONG can tap into enormous growth opportunities within the offshore wind industry**

## Why should DONG Energy focus on financing of wind projects?



**DONG's competitive advantage**



**Our competitive advantage**