

# Floating Offshore Wind – Opportunity and Challenge

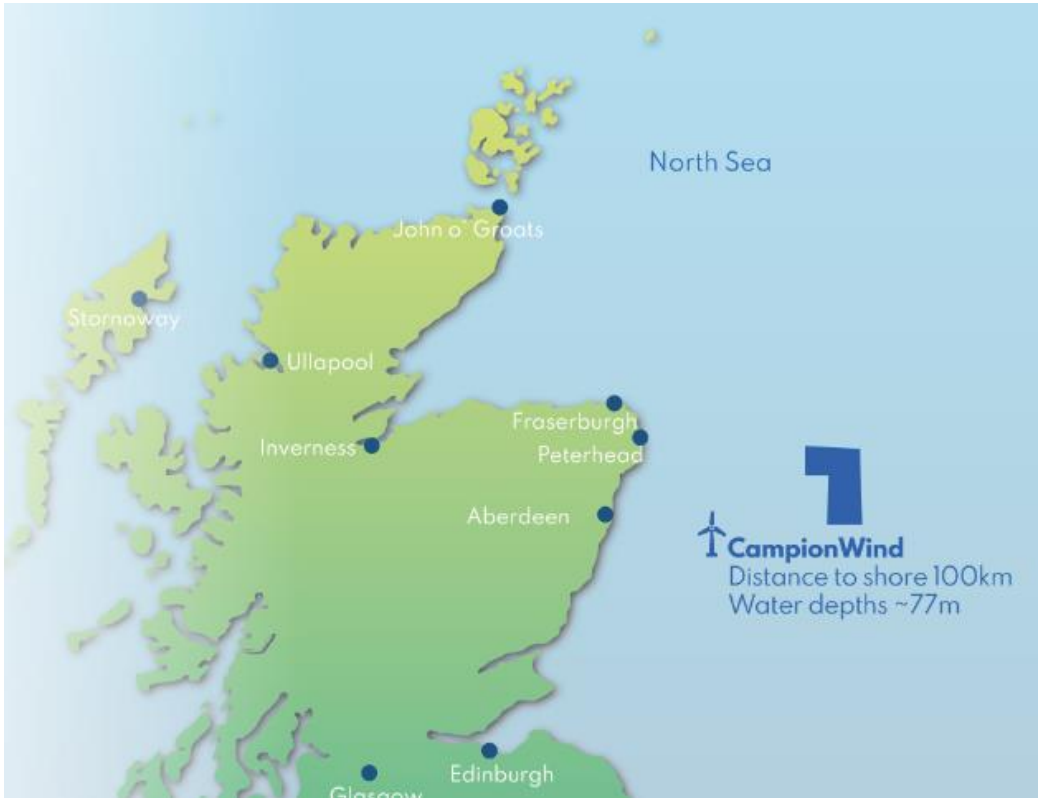
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Bristol

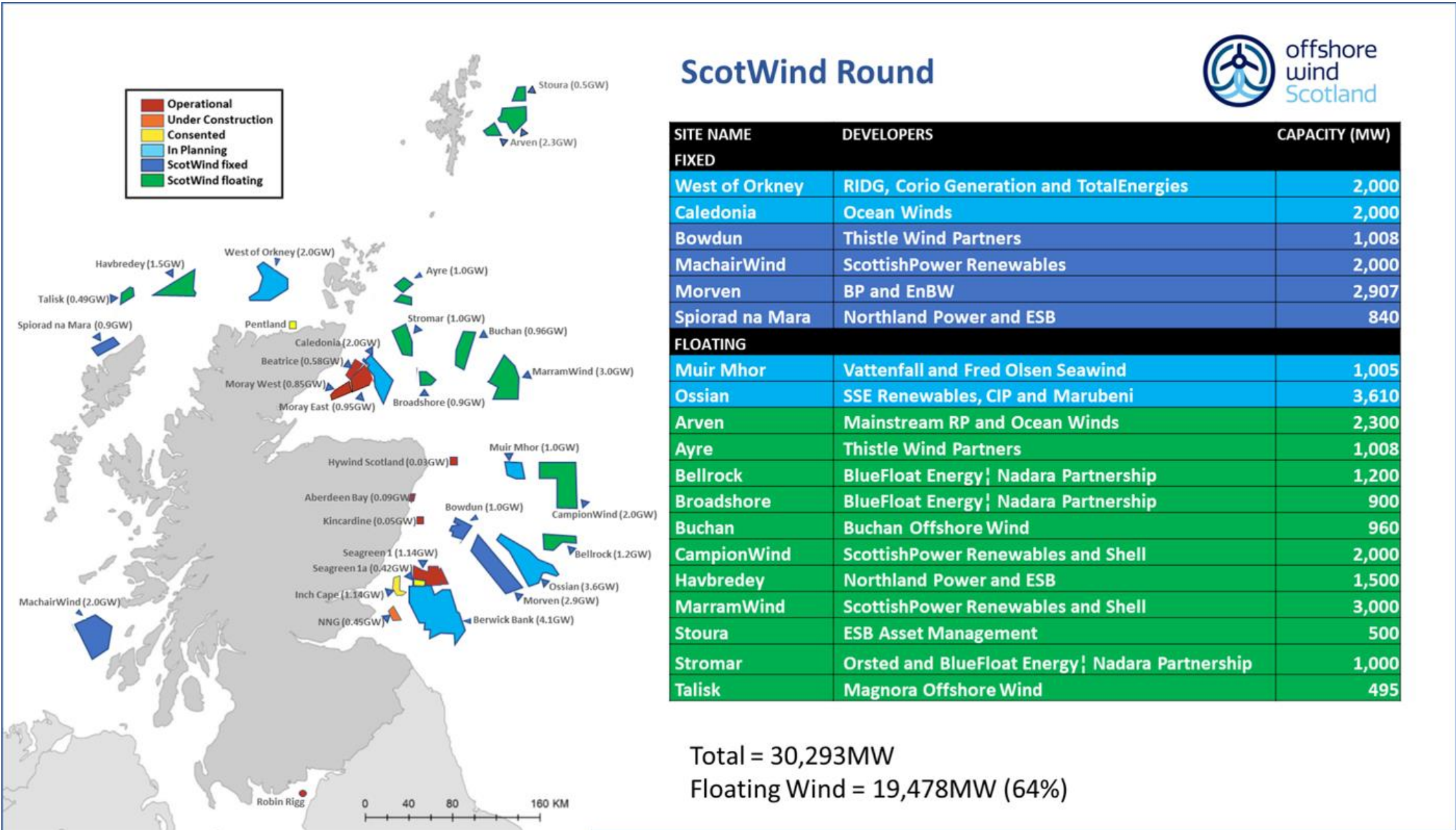
# Scotwind Floating Projects – SPR and Shell



|                              |                             |
|------------------------------|-----------------------------|
| <b>Technology</b>            | Floating                    |
| <b>Capacity</b>              | 3,000MW                     |
| <b>Site Area</b>             | 684 km <sup>2</sup>         |
| <b>Centre Point to Shore</b> | 95 km                       |
| <b>Mean Depth</b>            | 104m (range 87.8m – 133.7m) |
| <b>Grid connection</b>       | Peterhead                   |



|                              |                     |
|------------------------------|---------------------|
| <b>Technology</b>            | Floating            |
| <b>Capacity</b>              | 2,000MW             |
| <b>Site Area</b>             | 860 km <sup>2</sup> |
| <b>Centre Point to Shore</b> | 119 km              |
| <b>Mean Depth</b>            | 77m (Range 62-90m)  |
| <b>Grid connection</b>       | TBC                 |



# Floating wind – what needs to happen?

- **Confidence in outlook for UK plan to deploy offshore on a massive scale**
  - Electricity demand is expected to grow significantly from 2030-2050. Beyond Clean Power 2030, where/what should the projects be?
  - If we continue with industrial scale offshore wind as a cornerstone of our future generation, floating will have to be a major part of the mix.
  - Route to market in AR7 and beyond must protect smaller floating projects.
  - Locational signals must incentivise, not deter investment in Scotland.
  - Simplification and acceleration of consenting of strategic infrastructure.
- **We need a clear, strategic and deliverable plan for reinforcing the transmission network between north and south**
  - Major unprecedented programme of investment underway, with most still to come in next 10 years.
  - However, timelines for connection remain largely unclear with high risk on developers for non-delivery.
- **Supply chain investment is needed in the coming years prior to large scale projects being deployed**
  - Delivery of even a portion of the Scotwind floating sites will require major investment, expansion and upskilling – competitiveness is key.
  - Supply chain is ready to respond but market signals may come too late – government have a key role.
  - But – let's recognize the importance of investment that is happening now – Ardersier, Port of Nigg (Sumitomo), Hunterston (XLCC), Port of Cromarty Firth.
- **Technologists and Engineers have a big role to play in this journey to industrialise**
  - Understand your Client's challenges and the criticality of reducing pre-FID spend whilst continuing to add value with targeted expenditure.
  - Parallels from fixed bottom offshore wind – challenging the standards, optimising design - has unlocked vast swathes of deeper fixed sites at acceptable cost level.
  - Are sites really floating or can we leverage novel fixed/hybrid technologies?
  - Priority areas in development/pre-FID phase – optimisation of offshore surveys, accurate cost modelling, maximizing yield/optimising layouts, robust technology shortlisting, identification and leverage of key CAPEX reduction opportunities.
- **Patience and perseverance will have rewards**
  - Developers need to be comfortable taking calculated and measured business risk - confidence in the road ahead is key.
  - We can and ought to go faster, but in the current climate we need to stay the course.

# Thank you

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