

THE BUSINESS NETWORK FOR OFFSHORE WIND

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  Business Network for Offshore Wind

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U.S. Market Overview & Insights

Business Network for Offshore Wind

 BUSINESS NETWORK *for*
OFFSHORE WIND

UPDATED: 2022/03/31

Business Network for Offshore Wind

- 1 Focus on developing US offshore wind industry and its supply chain
- 2 Not-for-Profit, Membership-Based
- 3 Provide: *Information, Education, Introductions*

U.S. OSW Structure



BUSINESS NETWORK FOR
OFFSHORE WIND

STATES

Request call areas, enact policy that drives the market, enforce state and local regulations

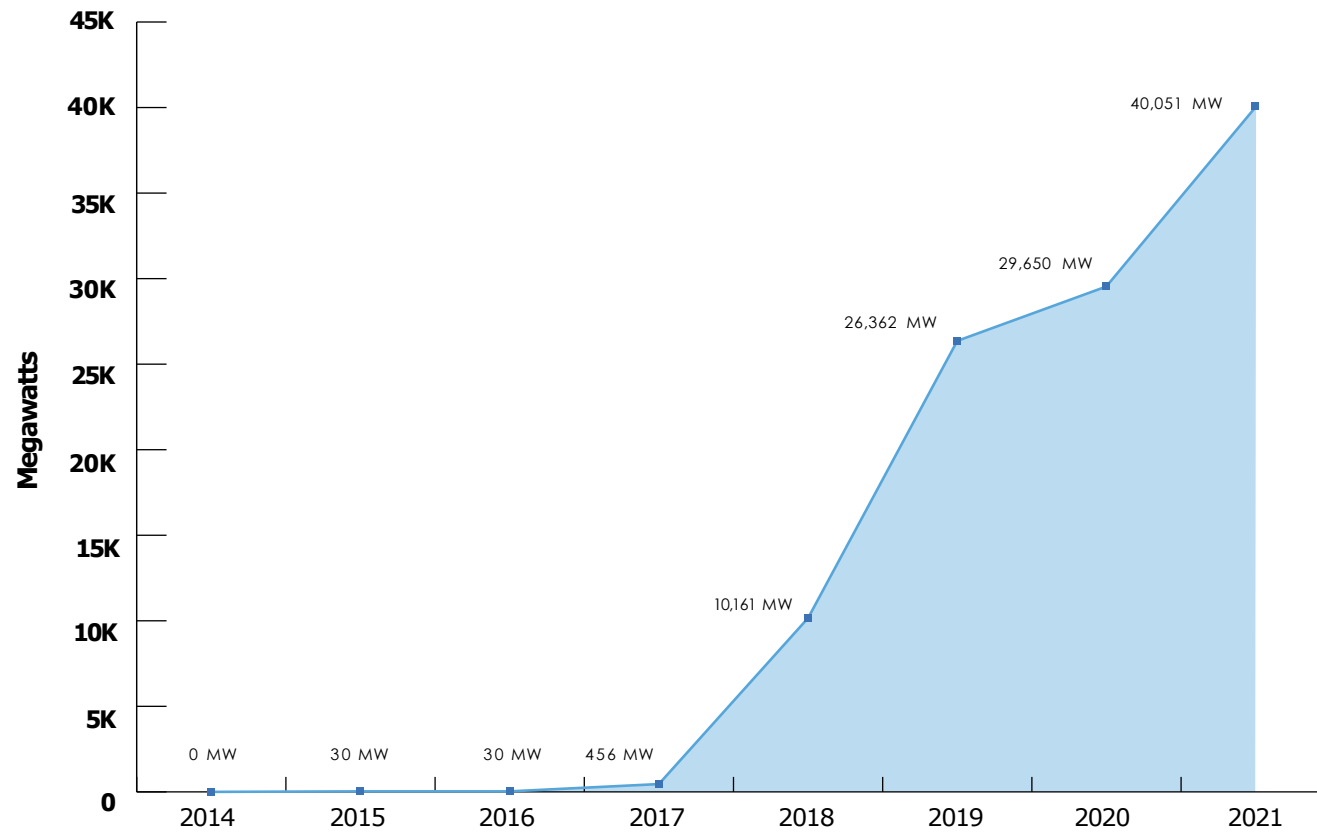
U.S. BOEM / U.S. BSEE

Siting, leasing, permitting and approval of plans, regulate OSW projects

PRIVATE DEVELOPERS / LEASEES

Acquire lease rights and develop projects

State Commitments to OSW



Updated 2021/04/08

The trends of sum of Megawatts and sum of Megawatts for year

Offtake Pathways

17,578.2

MWs with
offtake pathways
as of Feb. 2022

8,434.5

State
procurements
that took place
during 2021
(see Fig. 7, p. 18)

9,143.7

State
procurements
that took place
prior to 2021
(see Fig. 8, p. 19)

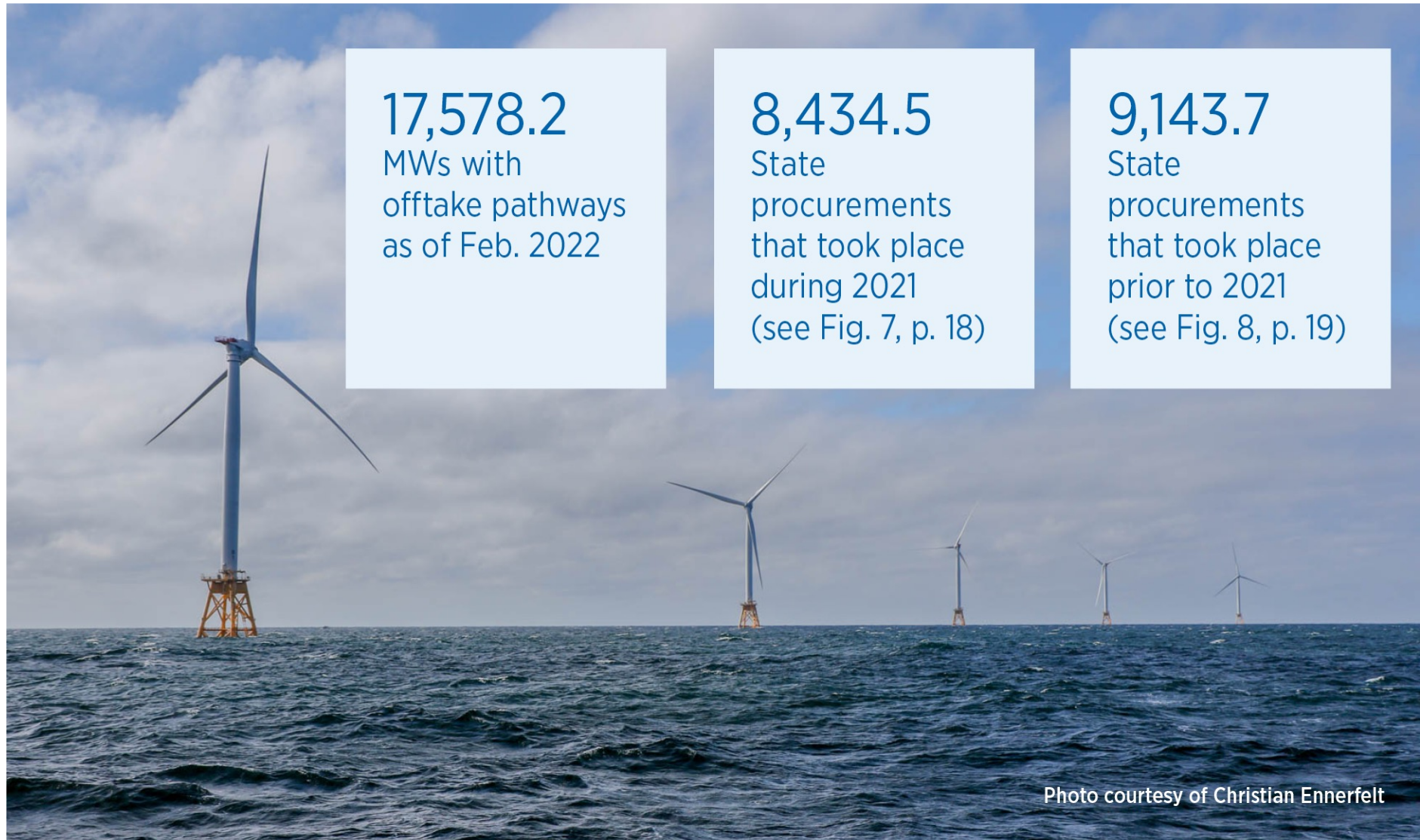
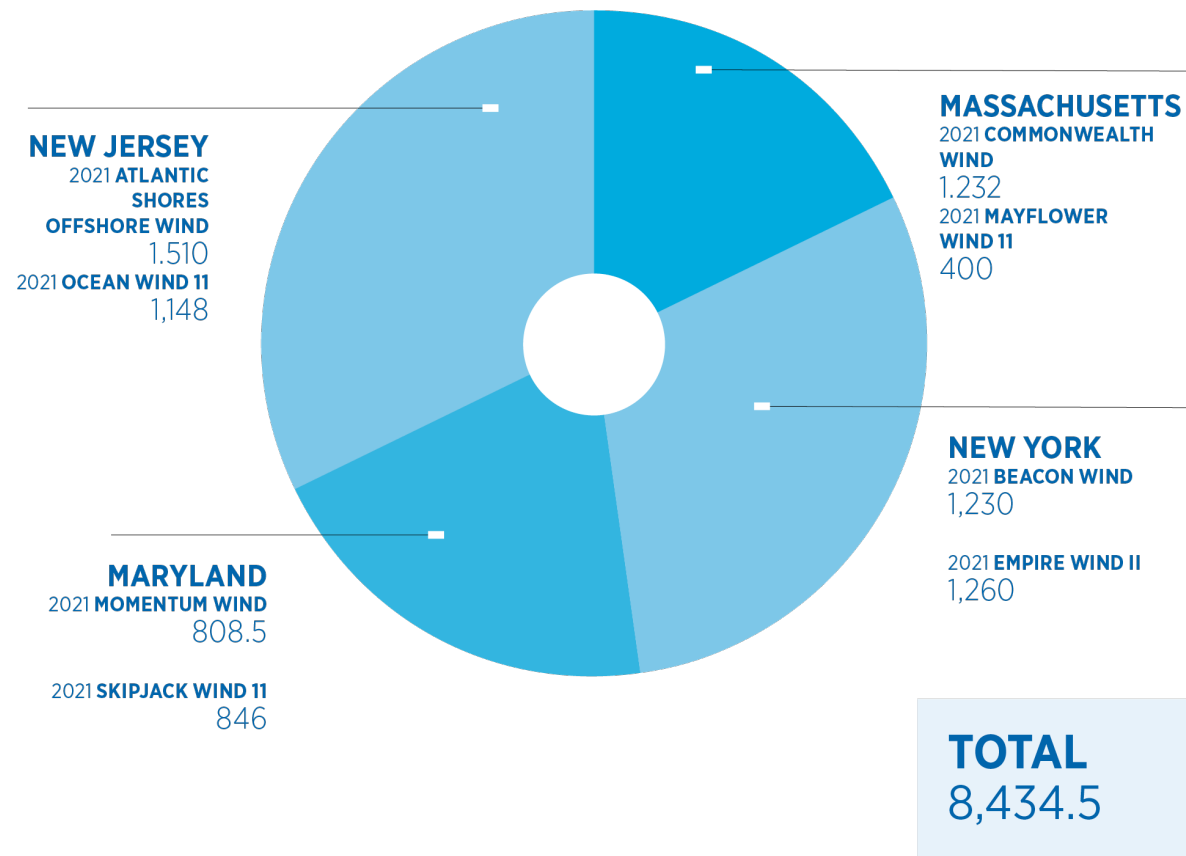
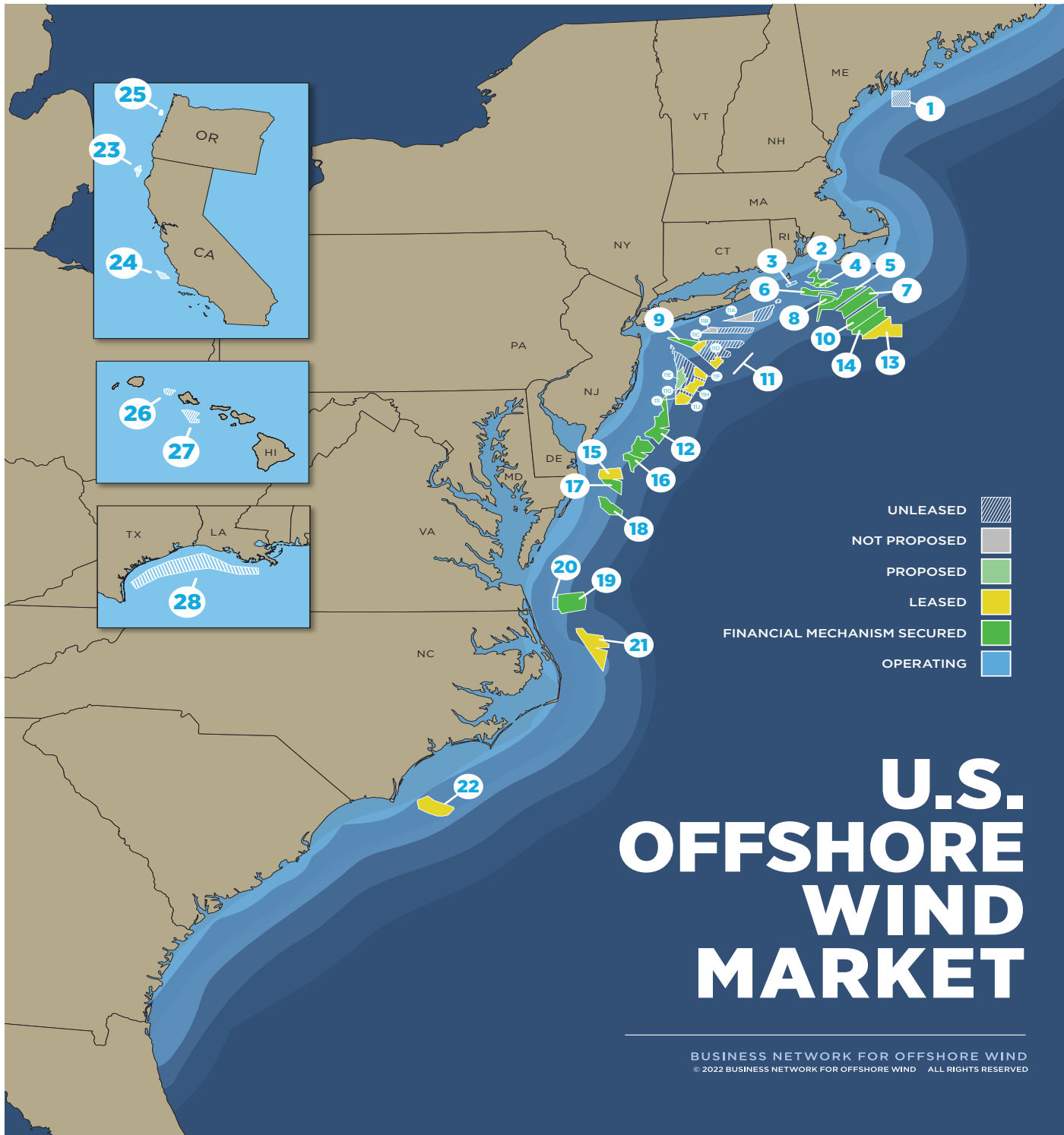


Photo courtesy of Christian Ennerfelt

State Procurements During 2021





U.S. OFFSHORE WIND MARKET

U.S. OSW LEASE AREAS

- 1** **Maine Aqua Ventus I** (New England Aqua Ventus) [11 MW]
- 2** **Revolution Wind** (Ørsted / Eversource) [704 MW]
- 3** **Block Island Wind Farm** (Ørsted) [30 MW]
- 4** **South Fork Wind Farm** (Ørsted / Eversource) [132 MW]
- 5** **Bay State Wind**
- 6** **OCS-A 0486**
- 7** **Vineyard W. / Park City W. / Commonwealth W.** (CIP / Avangrid) [800/804/1,232 MW]
- 8** **Sunrise Wind** (Ørsted / Eversource) [880 MW]
- 9** **Empire Wind 1 & 2** (Equinor / bp) [816/1,260 MW]
- 10** **Beacon Wind** (Equinor / bp) [1,230 MW]
- 11** **NY Bight Call Area**
 - A (Fairways N) • B (Fairways S) • C (OCS-A 544) • D (OCS-A 537)
 - E (OCS-A 543) • F (OCS-A 538) • G (OCS-A 540) • H (OCS-A 539)
 - I (OCS-A 541) • J (OCS-A 542)
- 12** **Atlantic Shores Offshore Wind** (EDF / Shell) [1,510 MW]
- 13** **Liberty Wind** (CIP / Avangrid)
- 14** **Mayflower Wind** (EDPR / Shell) [1,204 MW]
- 15** **Garden State offshore Energy** (Ørsted)
- 16** **Ocean Wind 1 & 2** (Ørsted / PSEG) [1,100/1,148 MW]
- 17** **Skipjack I / II Wind Farm** (Ørsted) [120/846 MW]
- 18** **MarWin / Momentum Wind** (US Wind) [270/808.5 MW]
- 19** **Coastal Virginia OSW - Commercial** (Dominion Energy) [2,640 MW]
- 20** **Coastal Virginia OSW - Pilot** (Dominion Energy) [12 MW]
- 21** **Kitty Hawk Offshore Wind** (Avangrid)
- 22** **Carolina Long Bay**
- 23** **Humboldt Wind Energy Area**
- 24** **Morro Bay**
- 25** **PacWave South**
- 26** **Oahu North Call Area**
- 27** **Oahu South Call Area**
- 28** **Gulf of Mexico OCS**

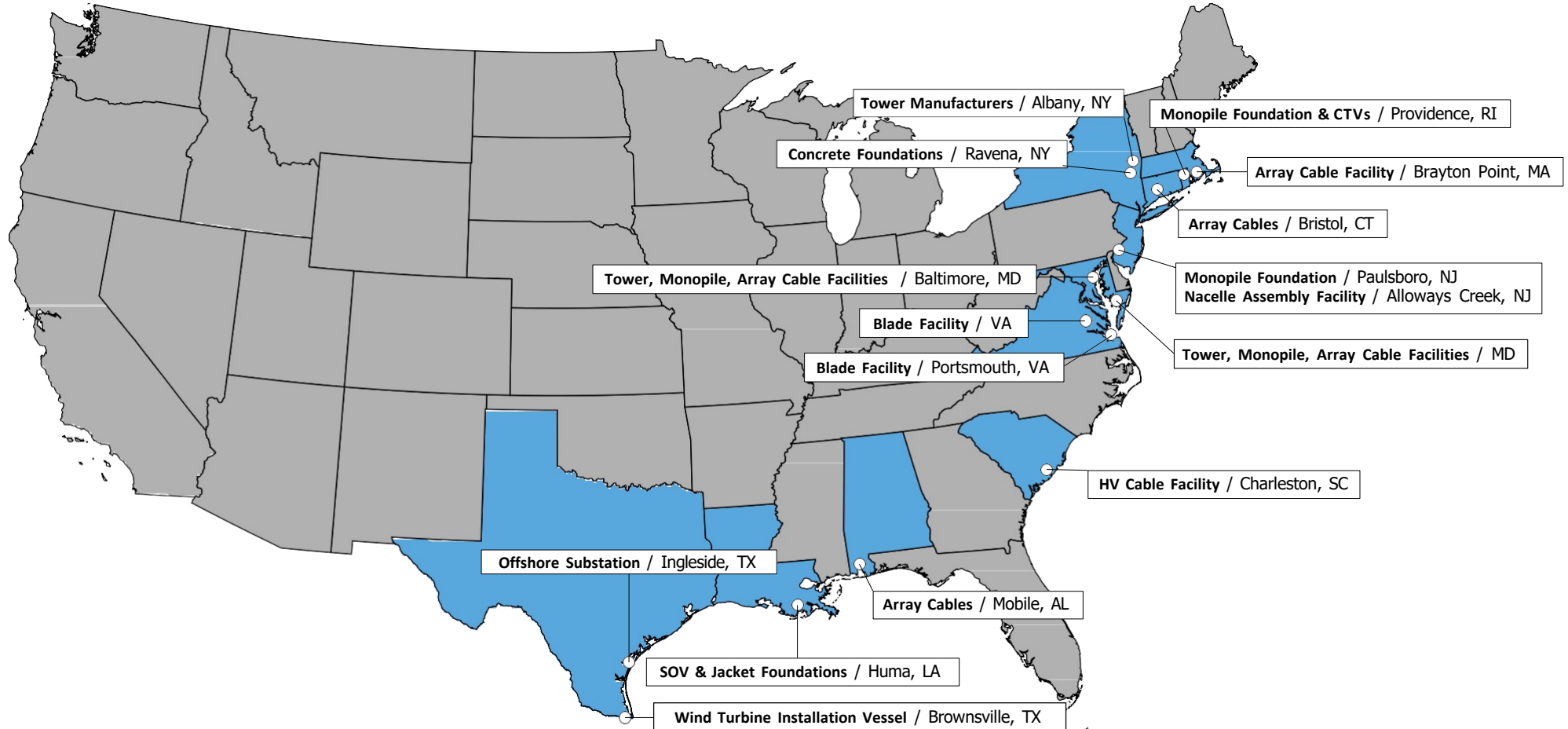
OSW Leasing Path Forward 2021-2025



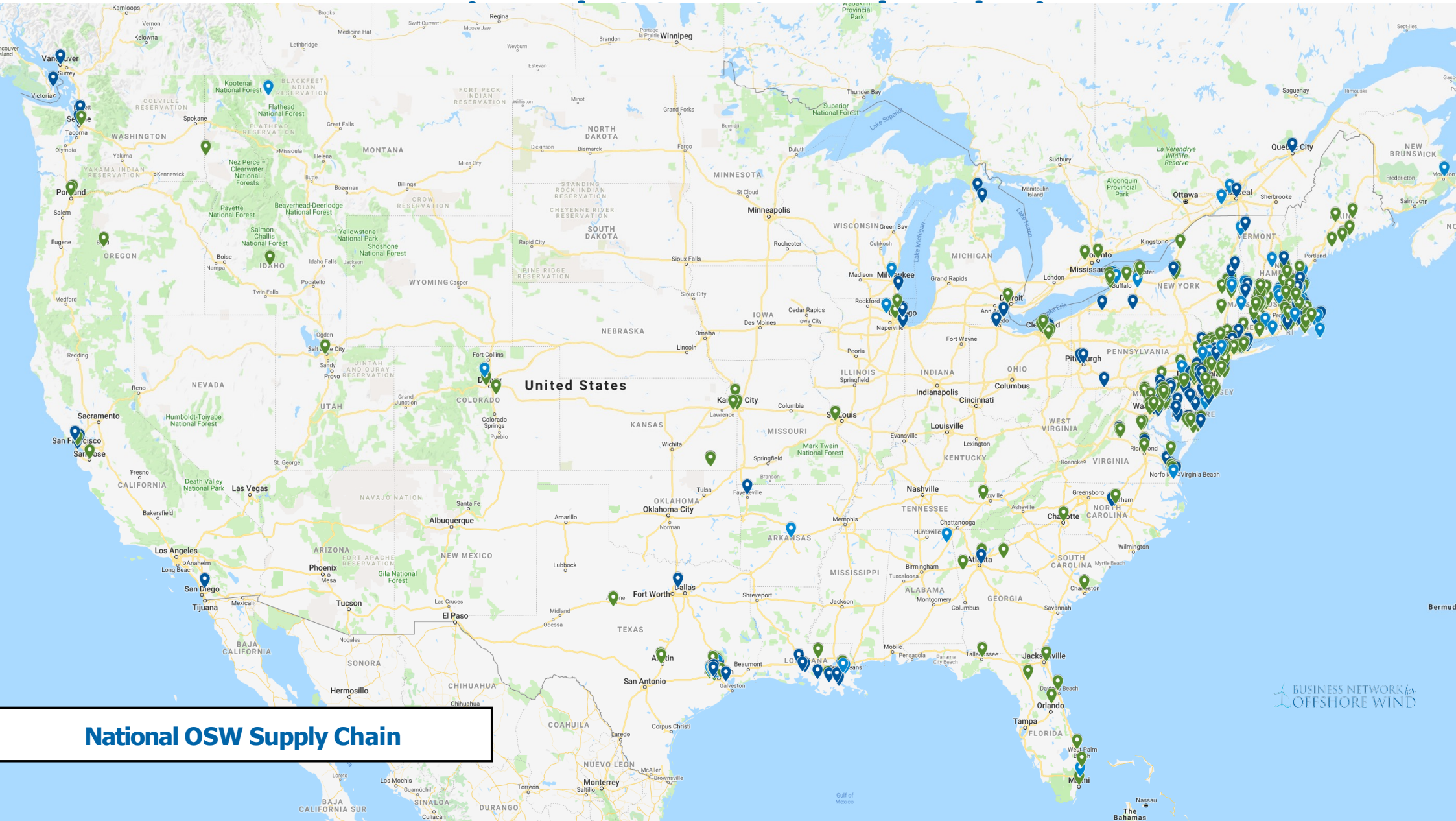
Biden Administration 2025 Goals: A Global Perspective

- 16 COPs approved by 2025, representing at least 19GW of OSW
- Currently, ~50GW deployed globally
- UK + Germany combined = 20GW

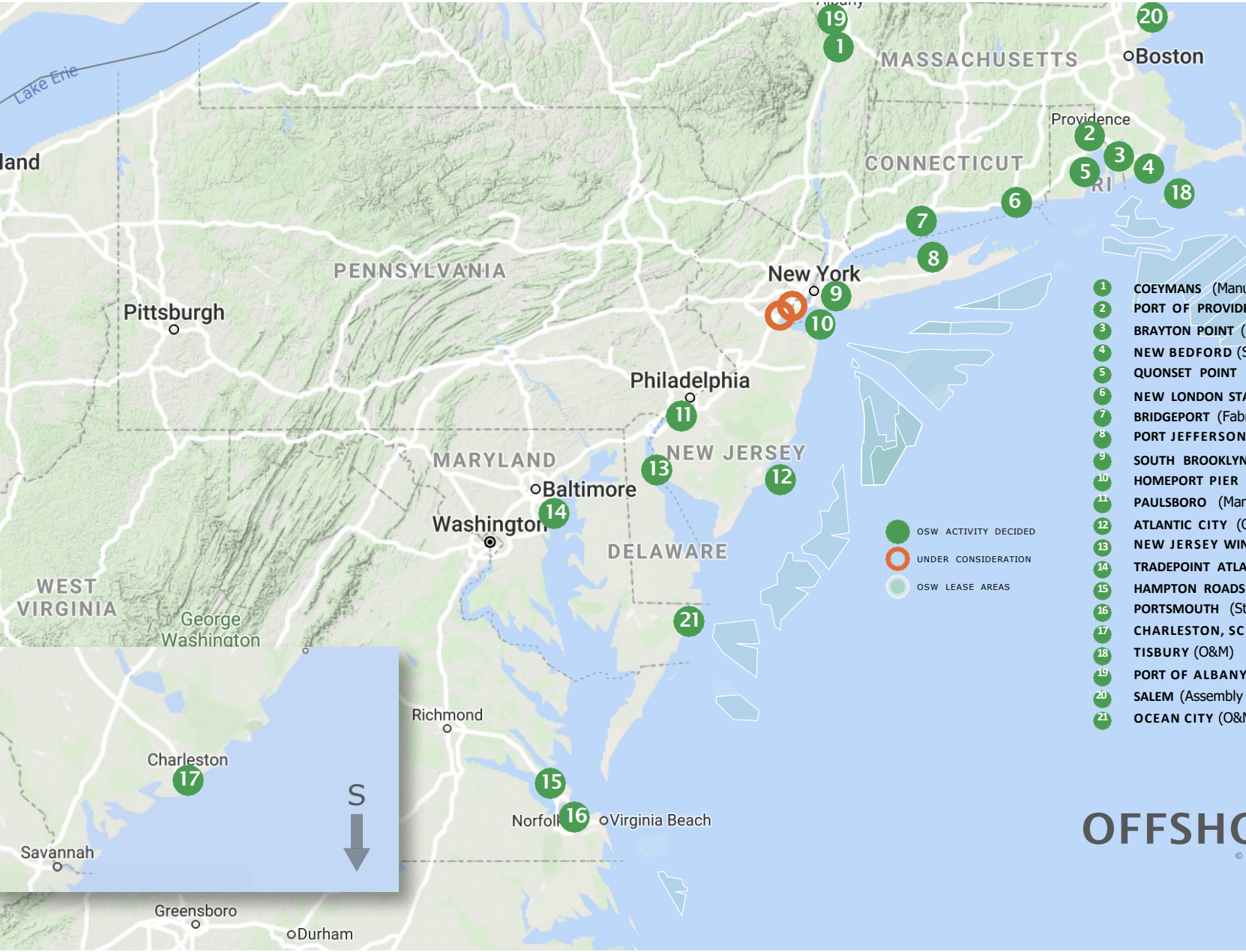
Supply Chain Development: Major Component Manufacturing



Supply Chain Development: National Opportunities



National OSW Supply Chain



- 1 COEYMANS (Manufacturing)
- 2 PORT OF PROVIDENCE (Construction, Manufacturing)
- 3 BRAYTON POINT (Staging & Manufacturing)
- 4 NEW BEDFORD (Staging)
- 5 QUONSET POINT (Construction)
- 6 NEW LONDON STATE PIER (Staging/Pre-Assembly & Construction/Installation)
- 7 BRIDGEPORT (Fabrication, Staging, O&M)
- 8 PORT JEFFERSON (O&M)
- 9 SOUTH BROOKLYN MARINE TERMINAL (O&M)
- 10 HOMEPORT PIER (Staging)
- 11 PAULSBORO (Manufacturing)
- 12 ATLANTIC CITY (O&M)
- 13 NEW JERSEY WIND PORT (Staging & Manufacturing)
- 14 TRADEPOINT ATLANTIC (Staging & Manufacturing)
- 15 HAMPTON ROADS (Manufacturing)
- 16 PORTSMOUTH (Staging)
- 17 CHARLESTON, SC (Cables)
- 18 TISBURY (O&M)
- 19 PORT OF ALBANY (Manufacturing)
- 20 SALEM (Assembly & Staging)
- 21 OCEAN CITY (O&M)

BUSINESS NETWORK FOR OFFSHORE WIND

EAST COAST US OFFSHORE WIND PORTS

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Table 11. West Coast Ports Marshalling Capabilities and Assessment

Port Name	State	Laydown Area (acres)	Quayside Length (m)	Number of berths	Berth Depth (m)	Channel Depth (m)	Bearing Capacity (t/m ²)	Air-Draft Limit (m)	Readiness Level (Floating Substructure)
Port of Seattle	WA	1,541.9	2,400	20	23.2	>30		None	High congestion and bearing capacity
Astoria	OR	20.55	1551	5	12.2	14		None	Laydown and bearing capacity
Port at Coos Bay ¹³	OR	1,335	80	7	11.28	11.28		Select areas limited	Bearing capacity and quayside length
Humboldt Marine Terminal	CA	150	703	2	11.6	10.67	Assume > 15	None	Channel depth
Morro Bay	CA		80	1	5.5	5.5		None	Laydown area, quayside length, berth/channel depth, and bearing capacity
San Francisco	CA		870		15.2	15		67	Laydown area, bearing capacity, and air draft
Oakland	CA	1,300	7,800	185	15	15		67	Bearing capacity and air draft
Richmond	CA	195	2,350	7	11.5	11.5		67	Bearing capacity and air draft
Benicia	CA	645	1,550	4	11.5	11.5		67	Bearing capacity and air draft
Hueneme ¹⁴	CA	120	800	5	10.5	11		None	Berth depth

OSW Market Dashboard

18 OSW FED LEASE AREAS

1,742,252 ACRES LEASED

21,150MW ESTIMATED CAPACITY (USING 3MW/MZ)

30GW FEDERAL GOALS BY 2030

40GW STATE GOALS BY 2040

\$3,753,670B U.S. INVESTMENT

U.S. PROJECTS UNDER DEVELOPMENT

PROJECT	DEVELOPER(S)	MW	STATUS
ATLANTIC SHORES OSW (NJ)	Shell, EDF Renewables	1,510	Permitting (COP)
BAY STATE WIND (MA)	Ørsted, Eversource	-	Permitting (COP)
BEACON WIND (NY)	Equinor, BP	1,230	Permitting (SAP)
BLOCK ISLAND WIND FARM (RI)	Ørsted, Eversource	30	Operating
CADEMO DEMO PROJECT (CA)	CIERCO Projects Corporation	-	N/A
COMMONWEALTH WIND (MA)	Avangrid Renewables	1,232	Site Control
CVOW - COMMERCIAL (VA)	Dominion Energy	2,640	Permitting (COP)
CVOW - PILOT (VA)	Dominion Energy	12	Operating
EMPIRE WIND 1 (NY)	Equinor, BP	816	Permitting (COP)
EMPIRE WIND 2 (NY)	Equinor, BP	1,260	Permitting (COP)
GARDEN STATE OFFSHORE ENERGY (NJ)	Ørsted, PSEG	-	Permitting (SAP)
ICEBREAKER (OH)	LEEDCO, Fred. Olsen Ren.	20.7	Off-take
IDEOL PILOT PROJECT (CA)	Ideal USA Inc.	-	N/A
KITTY HAWK (NC)	Avangrid Renewables	-	Permitting (COP)
MARWIN (MD)	US Wind	270	Permitting (COP)
MAYFLOWER WIND (MA)	Ocean Winds, Shell	1204	Permitting (COP)
MOMENTUM WIND (MD)	US Wind	808.5	Site Control
NEW ENGLAND AQUA VENTUS 1 (ME)	New England Aqua Ventus, LLC, RWE	11	Off-take
OCEAN WIND 1 (NJ)	Ørsted, PSEG	1,100	Permitting (COP)
OCEAN WIND 2 (NJ)	Ørsted, PSEG	1,148	Off-take
PARK CITY WIND (CT)	CIP, Avangrid Renewables	804	Permitting (SAP)
REVOLUTION WIND (CT)	Ørsted, Eversource	304	Permitting (COP)
REVOLUTION WIND (RI)	Ørsted, Eversource	400	Permitting (COP)
SKIPJACK WIND 1 (MD)	Ørsted	120	Permitting (COP)
SKIPJACK WIND 2 (MD)	Ørsted	846	Site Control
17,578.2 TOTAL MW			

PERMITTING

SAP	COP
IN PREPARATION	IN PREPARATION
SUBMITTED/UNDER REVIEW	SUBMITTED/UNDER REVIEW
APPROVED	APPROVED
1	0
0	12
15	2

U.S. OSW CONTRACTS

869

IMPORTANT UPCOMING DATES

2/9/2022	GULF OF MEXICO ENVIRONMENTAL ASSESSMENT COMMENT PERIOD CLOSES	LA, FED
5/1/2022	BOEM EXPECTS TO ISSUE NOA OF OCEAN WIND DRAFT EIS	NJ
7/1/2022	NJ OSW SOLICITATION #3 - APPLICATION WINDOW OPENS	NJ
7/1/2022	OSC-A 0487 - DEADLINE FOR COP SUBMISSION	RI, MA, FED
10/1/2022	NJ OSW SOLICITATION #3 - APPLICATION WINDOW CLOSES	NJ
1/1/2023	OCS-A 0487 - SITE ASSESSMENT TERM ENDS	RI, MA, FED
4/1/2023	NJ OSW SOLICITATION #3 - BPU AWARDS PROJECT	NJ
4/1/2024	NJ OSW SOLICITATION #4 - APPLICATION WINDOW OPENS	NJ
7/1/2024	NJ OSW SOLICITATION #4 - APPLICATION WINDOW CLOSES	NJ
1/1/2025	NJ OSW SOLICITATION #4 - BPU AWARDS PROJECT	NJ



Your ad here
Contact courtney@offshorewindus.org for details.


BUSINESS NETWORK FOR OFFSHORE WIND **SupplyChainConnect**
Learn more at offshorewindus.org/SupplyChain



OSW Supply Chain Connect

BUSINESS NETWORK FOR OFFSHORE WIND

SupplyChainConnect






Photo Credit: MH Vestas

The **Business Network for Offshore Wind Supply Chain Connect** allows companies to publicly indicate their interest and ability to supply components and services for U.S. offshore wind projects. It is used as a source for identifying potential recipients of Requests for Proposals (RFPs) as well as identifying local, small, minority-owned, women-owned, and/or veteran-owned businesses for partnership with developers and/or Tier 1 suppliers. Please be sure to complete all fields and regularly update and maintain your organization's profile.

To register, first [gather the information requested](#) to identify the products and services you can provide for offshore wind projects. You'll have 30 minutes to fill out the form before the system logs you out. Your information will be saved.

COMPANY NAME

EMAIL ADDRESS

I agree to have my information shared with developers and other companies looking for partners. (Required)

Supply Chain Categories - SERVICES	
SERVICES	PRODUCTS/MATERIALS
Select either SERVICES or PRODUCTS/MATERIALS above, then click on a category below to see company info.	
TURNKEY PROJECT (DESIGN / PROCUREMENT / CONSTRUCTION / INSTALLATION)	
Wind Power Plants	6 companies
Marine & Underground Cable Systems	6 companies
Fiber Cable Systems	1 company
Other Modules / Units	1 company
BUILDING & CONSTRUCTION WORKS	
Reservoir Construction Works	6 companies
Pier / Port Construction Works	12 companies
Road / Bridge Construction Works	9 companies
Piling / Boring	27 companies
Tunnelling Construction Works	5 companies
General Buildings / Offices	3 companies
Utility Construction	35 companies
Embankments / Earth Banks Construction Works	7 companies
Ground Work / Levelling Works	4 companies
Cable & Pipeline Trenches Construction Works	24 companies
Other Building & Construction Works	4 companies
WATER / SEWAGE CONSTRUCTION WORKS	
Pipe Rehabilitation	4 companies
Pipe Lining (Trenchless Sewer Repairs)	2 companies
Guided Drilling	1 company
Internal Pipe Coating	1 company
Water & Sewage Pumping Stations	6 companies
Metering Manholes	2 companies
Marine Pipe (Water / Sewage)	1 company
Other Water / Sewage Construction Works	4 companies

John Begala

Vice President, Federal & State Policy

Business Network for Offshore Wind

john@offshorewindus.org

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