



Quels développements futurs / stratégie de la France pour l'éolien offshore ?

5 juin 2018

L'éolien offshore : défis, opportunités et implications sur la couverture d'assurance
Swiss RE - Paris



FEE – the French Wind Energy Association

Created in 1996, France Energie Eolienne (FEE) supports and represents the wind energy sector (both onshore & offshore) in France.

Missions

- ✓ **FEE represents the wind industry** at public, national, European and regional authorities and regulating bodies,
- ✓ The association actively **participates in the creation of legislative and regulatory texts**,
- ✓ **It supports its members and facilitates their development in France.** The association **promotes the interests of the association members** and organises networking events as the annual national summit: “colloque national éolien” (around 1000 participants in September 2017).
- ✓ **An offshore wind committee** entirely dedicated to OW developments, chaired by Frédéric Petit (Siemens Gamesa Renewable Energy).
- **300 members (May 2018):** they built more than 90% of the installed wind turbines in France and operate 85% of them.
- Representatives in **all the French offshore wind consortia** (rounds 1&2 + FOW call for projects).
- www.fee.asso.fr



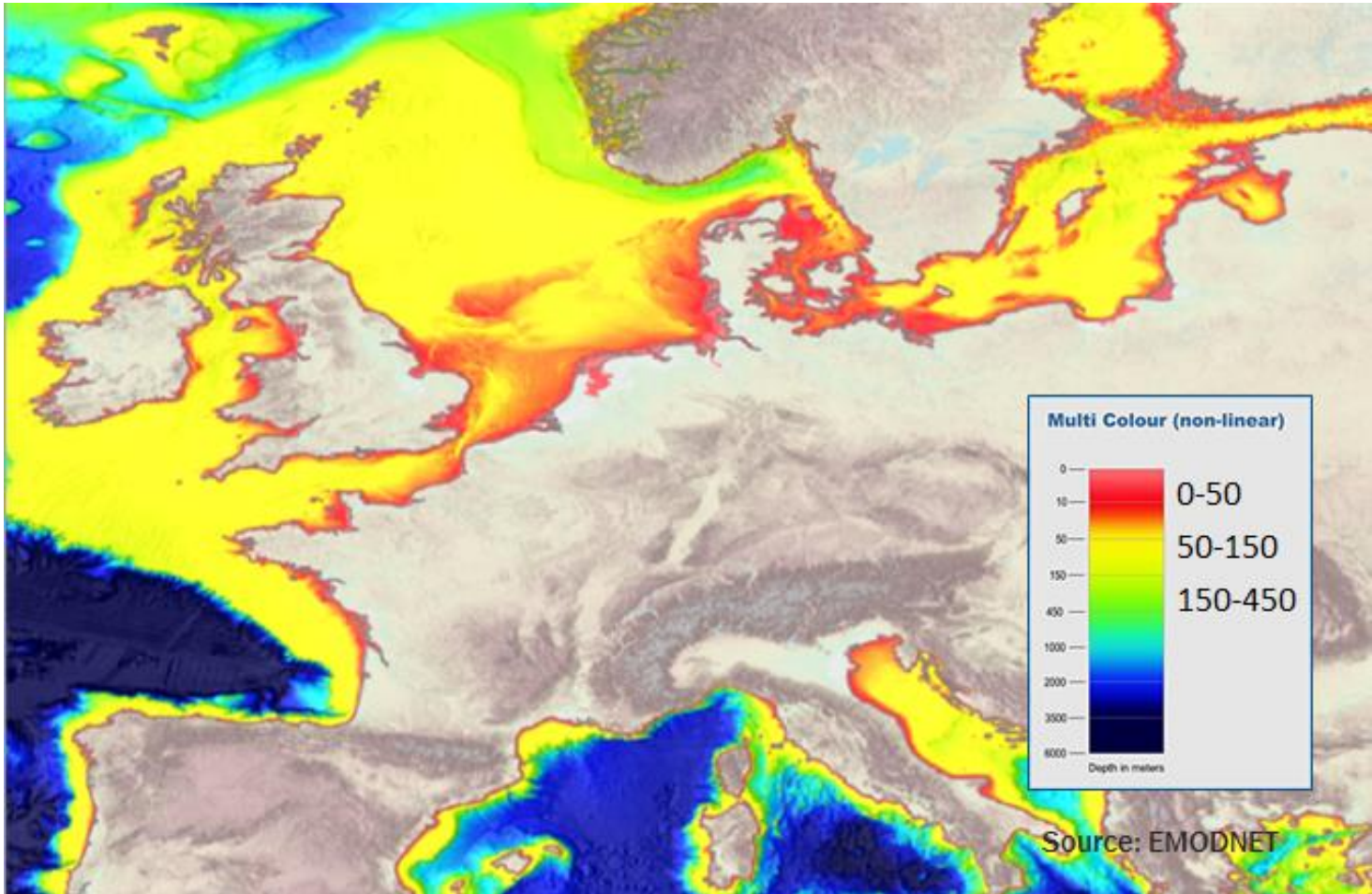
FEE's offshore wind Committee members

8.2 Consulting, ABB France, ADI Nouvelle-Aquitaine, Arkolia Energies, Atlantique Maritime Services, BCS Assurances, Biotope, Boralex, CCI littoral des Hauts-de-France, CEZ France, CG Sales Networks, Cluster maritime français, Colas, CIC, De Gaulle Fleurance & associés, DS Avocats, Ecole Centrale de Nantes, EDPR, Elatos, Elicio France, Emergya Wind Technologies, EnBW, Eneco, Energies Normandie, Enertrag, Engie Green, Envinergy Transaction, Eolec, Eolfi, Equinor, Everoze, EWZ, FEG, Gas Natural Fenosa, GE Renewables, Gide Loyrette, Gras Savoye, Groupe Valeco, H2Air, Hawk, Ideol, IFPEN, In Control France, Innergex, Jigrid, John Lain, JPEE, Kalliope, Leosphere, Lhotellier, LM Wind Power, Louis Dreyfus Armateurs, LPA-CGR Avocats, Lumo, Marsh, Nass & Wind, Natixis Energieco, Natural Power, Neoen, Net Wind, Nordex, Norton Rose Fullbright, Notus Energie France, NTR Wind Management, OFATE, Parkwind, Pôle Mer Méditerranée, Poma, PPI, Quadran Energies Marines, RES Group, Sabik Offshore, Safier Ingenierie, Sameole, SBM Offshore, Senvion, Shell, Siemens Gamesa RE, Société Générale, Socotec, Soleil du Midi, Statkraft, Terre & Lac Conseil, Tractebel, UL Dewi, Valorem Energie, Vattenfall, Velocita, Vendée Energie, Vestas, Vryhof, Vulcain, Watson Farley & Williams, Windvision France, WKN France, WPD Offshore



Europe – bathymetry

A huge potential for offshore wind in France





France's ambitions for the energy transition

- The **Energy Transition Act**, passed in August 2015, plans:
 - **40% renewables** in the electricity mix **by 2030**;
 - A **monitoring tool** called « **PPE** » to define the trajectories (volumes – installed capacities) for each energy on 5-years periods – under revision, next version (December 2018) will precise the 2019-2028 period;
- France considers **the fight against climate change as a top priority** and wants to keep its leadership in this field since the Paris Agreement (COP21);
- The EU is preparing the **3rd package for climate and energy** (clean energy package) with new ambitions for renewables for 2020-2030 → visibility and reform of the electricity market(s).



Ongoing administrative simplification: a new offshore wind framework

- **New tendering procedure since August 2016:** the competitive dialogue (see 3rd Round off Dunkirk)
- Announcements of the Prime Minister (2017/11/21) to « **strongly simplify** » the legal framework for offshore wind:
 - Preliminary investigations (wind, geophy, geotech, environment);
 - Envelop permit;
 - Grid connection works and operational risks covered by the French TSO, RTE (*act adopted on December 2017 and decree published on 28 March 2018*)
 - Calendar: law project back at the Parliament in June 2018 (2nd round);
- **Improvement of the acceptability** with preliminary public debate on the future area(s)' selection.



The « ESSOC » draft bill

- The « **ESSOC** » **bill** should implement the **simplifications for offshore wind** (art 34 for OW), previously mentioned ;
- **Current sensible discussions on the tariffs levels for rounds 1 & 2** (3 GW, 6 projects) → the French Government wants to renegotiate the prices (that were in the average prices awarded in 2012 & 2014);
- **An amendment to legalize the « renegotiation concept »** should be proposed at the Parliament in June;
- The text that will be submitted at the Parliament will be a **legislative amendment** and not an enabling Act any more (in order to be quicker);
- The ongoing 3rd round (Dunkirk) **could be eligible** for these new measures.



2 rounds, 6 projects: the start of offshore wind in France



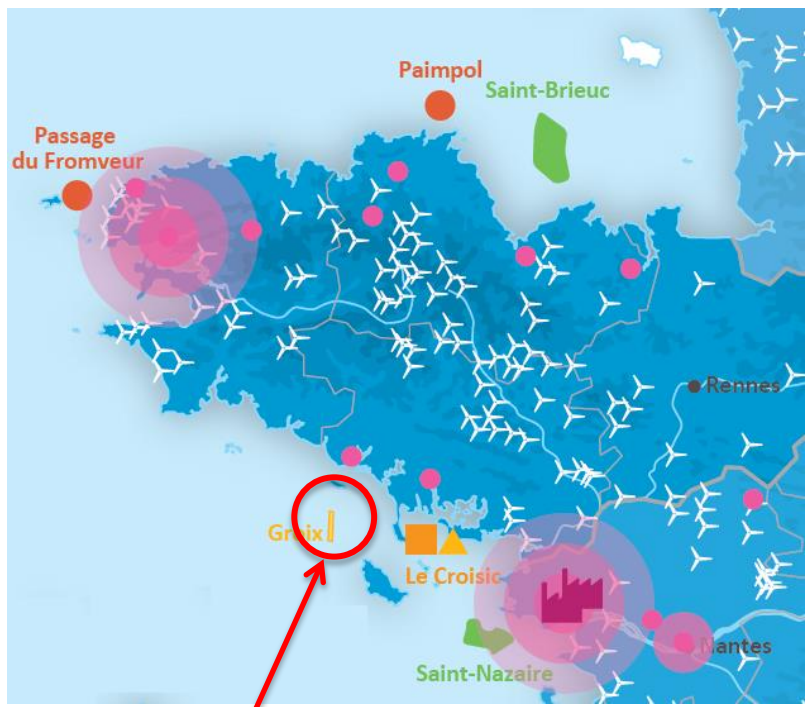
- **Bottom fixed projects** (2 rounds): the foundations of the French offshore wind industry;

~2 bn € investments for each 500 MW project;

- **1st commissioning in/from 2021**



Floating offshore wind – pilot farms (1/2)



✓ 4 awarded projects : 3 in the Mediterranean, 1 in Brittany (4x24 MW)

- ✓ Environmental permit application
- ✓ Commissioning by 2020



Floating offshore wind – pilot farms (2/2)



- ✓ Environmental permit application to come
- ✓ Commissioning by 2021



- ✓ Environmental permit application to come
- ✓ Commissioning by 2021



- ✓ Environmental permit application
- ✓ Commissioning by 2020



Ongoing tenders (3rd, 4th rounds + FOW)

- **Dunkerque (400-750 MW) – 3rd round (fixed) - ongoing**
 - **Launched:** Ongoing competitive dialogue procedure / phase 1 achieved: *i.e.* pre-selection of the candidates (**9 candidates pre-selected**) + ongoing discussions on the tender: the definitive tender conditions should be known by mid-June; **award expected before the end of 2018.**
- **1st FOW commercial tender - announced**
 - Public debate(s) and competitive dialogue could be launched « soon » (from 2019?)
 - Preliminary technical studies to be launched on sites off Brittany and in the Mediterranean Sea (ongoing discussions), as soon as the areas have been selected.
- **Oléron (~500 MW) – 4th round (fixed) - tbc**
 - Public debate and launch of preliminary technical studies in 2018?
 - Competitive dialogue could follow afterwards (tbc)



PPE – multiyear energy plan

- **The PPE is currently under revision** → ongoing public debate that will end on 30th June 2018;
- The **1st PPE** (2016-2018 and 2028-2033) mentioned:
 - **3 GW** commissioned by 2023;
 - Between **0,5-6 GW (bttm-fixed)** additional capacities awarded by 2023;
 - Between **0,2-2 GW (floating and other MRE)** additional capacities awarded by 2023;
- No modified figures have been proposed yet. The 1st revised version may be published **during autumn 2018** (no official announcement at the moment), definitive version to be adopted in **December 2018**;
- The new PPE should make the difference between bottom fixed and floating offshore wind tenders volumes. In the frame of the revision, FEE proposed **18 GW (BF and FOW) commissioned by 2030**.



Ongoing maritime spatial planning

- Implementation of the **maritime spatial planning directive** (EU), the objective is to plan all the maritime activities on the territory and on the EEZ;
- **Identification of macro-zones (with « OW vocation »)** off the coasts, by June 2018;
- **From June 2018:** public consultation on the coasts strategic documents (CSD - with macro-zones); **March 2019: definitive adoption of the CSD;**
- The Ministry of Energy will then have to **select tender zones in these macro-zones**, for both bottom fixed and FOW.



Latest industrial news



STX France –
Arkona
substation

GE's Merkur
order (DE)



Floatgen's 1st French
offshore wind
turbine
commissioning



Conclusions

- **Great ambitions** of France for offshore wind in the frame of the energy transition;
- **Concrete reforms of the legal framework** to accelerate the deployment of capacities and reduce costs (envelop permit, grid connection new model etc.);
- Some **situational uncertainties (tariffs – R1 & 2 and PPE)**;
- **Ongoing tasks: identification of macro-zones with « offshore wind vocation »** (maritime spatial planning) and **ambitious multiyear energy plan (PPE)**!
- **The French industry is ready** to participate in the 1st floating offshore wind commercial tender;



AGENDA 2018



The French national annual wind energy exhibition and conference:
17 and 18 October in Paris

Information and online registrations under:

www.colloque-national-eolien.fr



Thanks for your attention

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