Table of Contents

PART 1: EXECUTIVE SUMMARY PART 2: GLOBAL OFFSHORE WIND TRANSMISSION SECTOR		10 17	2.7	Offshore wind projects • Americas	94
				AniendasAsia PacificEurope	
2.1	Offshore wind developments Overview Voy growth delivers	18	PART	3: COUNTRY PROFILES	111
	 Key growth drivers Cost competitiveness of offshore wind Offshore wind's promising attributes Targets and mandates for offshore wind Policy and regulatory developments Americas Europe 		3.1	Americas 3.1.1 Brazil 3.1.2 Canada 3.1.3 USA	112 113 118 122 149
2.2	 Asia Pacific Market size and opportunity Existing offshore wind capacity and export cable lengt Projected offshore wind capacity and export cable len OSW export cables - top markets by 2030 			3.2.1 Belgium 3.2.2 Denmark 3.2.3 Finland 3.2.4 France 3.2.5 Germany 3.2.6 Ireland 3.2.7 Netherlands	150 160 170 179 189 202 211
2.3	Offshore transmission development routes Offshore wind transmission development routes TSO-owned and operated transmission Generator-owned links Offshore transmission operator (OFTO) model Independent offshore wind transmission - comp solicitation Merchant offshore transmission	37 etitive		3.2.8 Norway 3.2.9 Poland 3.2.10 Portugal 3.2.11 Spain 3.2.12 Sweden 3.2.13 UK 3.2.14 Other countries	223 232 239 247 255 265 282
	 Comparison of key features of these models Offshore transmission components - who builds what Special initiatives North Sea Wind Power Hub (NSWPH) Baltic Offshore Grid (BOG 2050) 	?	3.3	Asia 3.3.1 Australia 3.3.2 China 3.3.3 India 3.3.4 Japan 3.3.5 South Korea	287 288 295 311 318 331
2.4	Offshore wind transmission technology Offshore transmission solutions Optimal network configurations HVAC vs HVDC Subsea cables Offshore substations Structures and foundations Construction, installation and monitoring solutions Transmission for floating offshore wind	53	Each	3.3.6 Taiwan 3.3.7 Vietnam country profile file includes Industry structure Recent policy and regulatory developments Existing offshore wind generation and transmission capac Planned or proposed offshore wind generation and trans capacity	340 350 city
2.5	 Key technology players Offshore cables Offshore transformers/substations Offshore structures Other key players 	65	PART	Existing OWT projects (developer, capacity, technology, investment and key contractors) Upcoming and planned OWT projects (developer, capacitechnology, expected investment and key contractors) 4: APPENDIX	ty,
2.6	Offshore wind transmission costs Offshore wind project - transmission capex Key factors affecting OSW transmission capex Cost trends - cables and transformers	88	4.1 4.2 4.3	Sources and methodology Global and regional industry associations List of abbreviations	362 363 364

OSW transmission investment by 2030 OSW transmission investment in key markets