



Ports – The capacity to grow with Offshore Wind

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Four types of ports used in the Offshore Wind industry

Pre-Installation ports are used during construction across OEMs.

Ports for the OW industry

Pre-Installation port



Manufacturing port



Four types of ports used in the Offshore Wind industry

Pre-Installation ports are used during construction across OEMs.

Ports for the OW industry

Commissioning, Operation and Maintenance ports

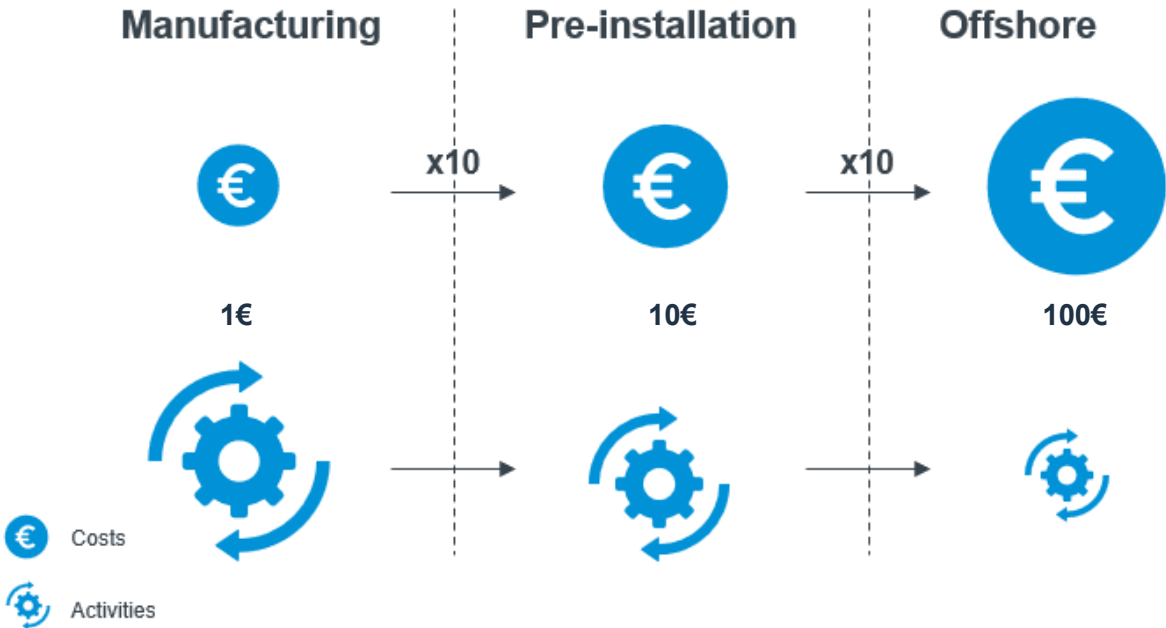


Foundation manufacturing and marshalling



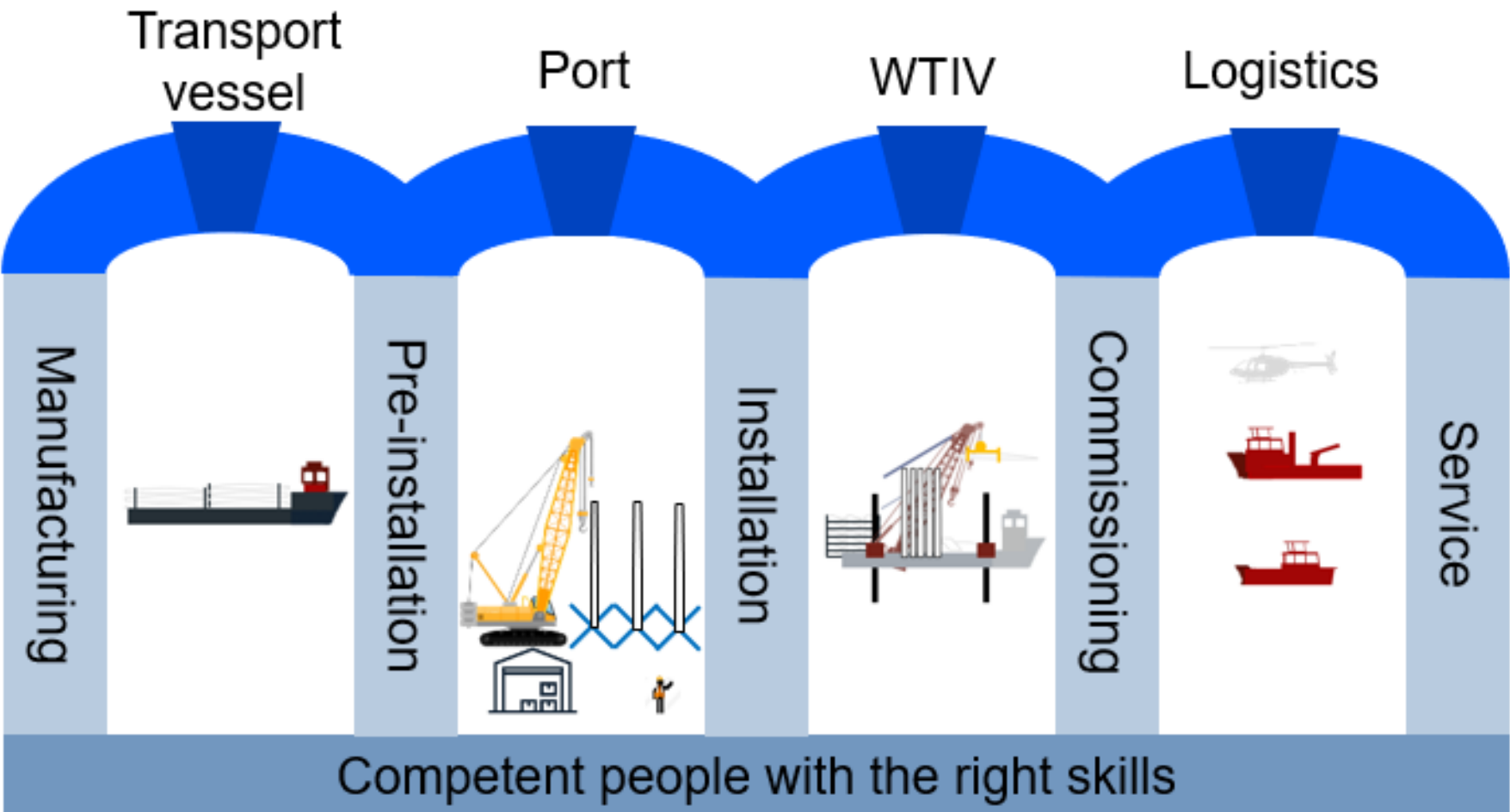
Reducing installation cost - building offshore projects onshore

We are building **offshore projects onshore**
Moving more processes back to the value chain
Proven pre-installation **concept** and improvement of **safety** and **quality**



Keystone elements of project delivery

Bridging the different phases



What services do we need?

Follow the money...

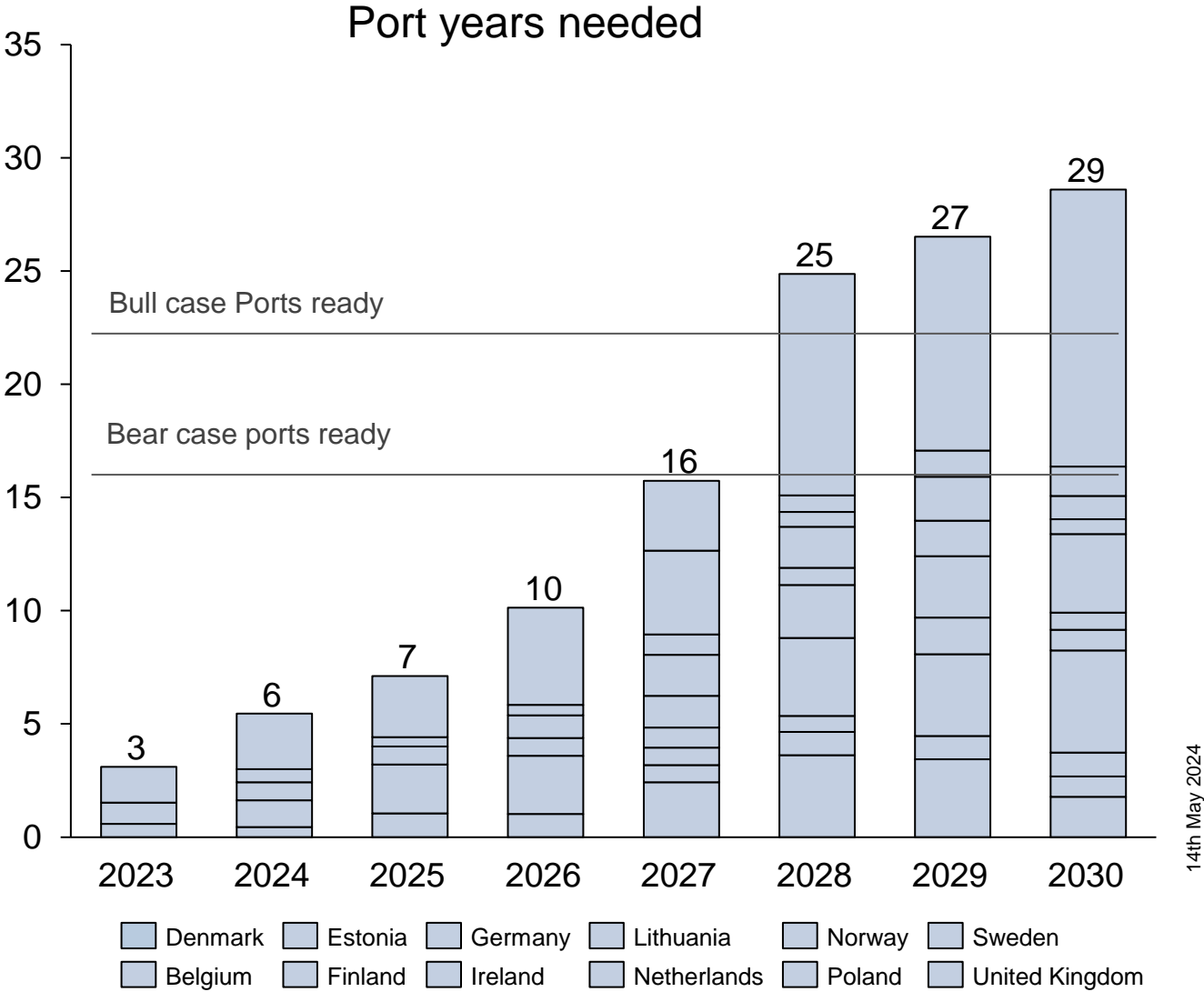
- Local items often only locked 6-12 months in advance.
 - Annual jobs per GW during installation:*
 - Primary jobs ~170
 - Secondary jobs ~210
 - Tertiary jobs ~185
- * CIP fonden 2023



Port need per country

The graph assumed present methods

- No synergies between projects
- Ports for Foundations not Included in demand



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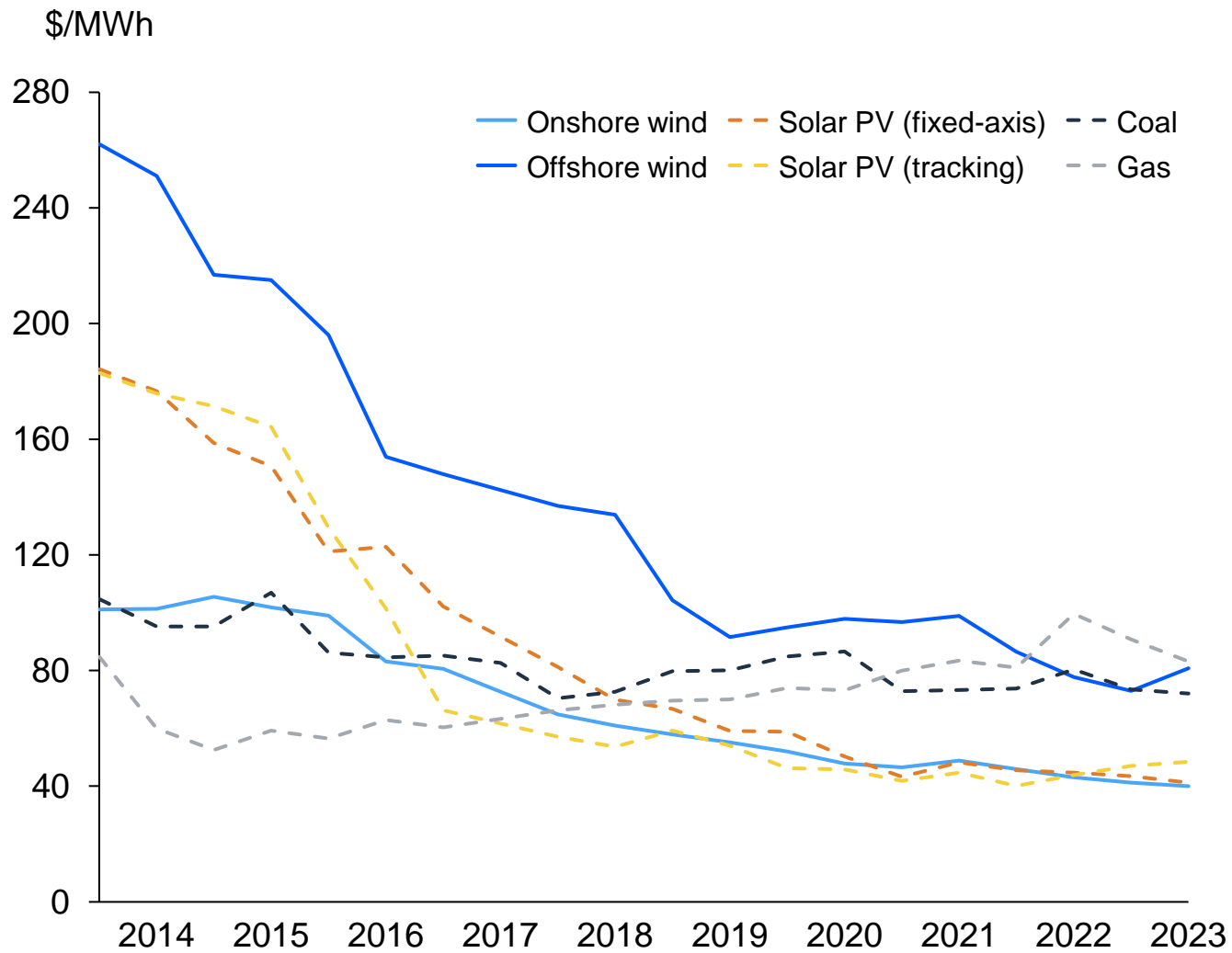
Main Port challenges

So securing capacity remains the main objective in the future

Challenges	Main Port challenges
1	Low or no certainty on pipeline
2	Limited appetite for private owned ports
3	High focus on goods over quay – not job creation
4	<u>High investments required compared to other port activities</u>
5	A need for <u>Strategic partnerships</u>



Rønne Havn



Source: BNEF, H2 2023 LCOE Update



The good news is, it's now cheaper to save the planet than to ruin it

John Doerr, Kleiner Perkins

Thank You

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