



# HOW REGIONAL COOPERATION CAN HELP BRING U.S. OFFSHORE WIND TO THE NEXT LEVEL

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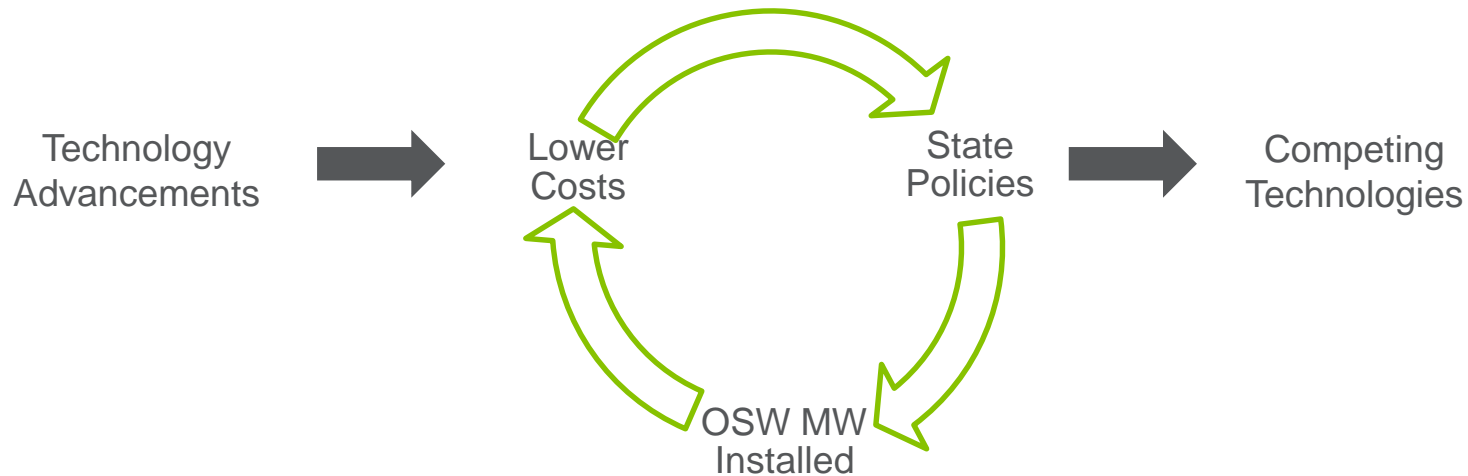
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NAVIGANT

# WHAT FEDERAL-STATE POLICIES AND THEIR INTERACTIONS CURRENTLY PRESENT THE MOST CHALLENGE FOR THE OFFSHORE WIND INDUSTRY?

States play a pivotal role in advancing offshore wind. They can advance the cost reduction cycle with favorable policies or stall the market with excessive restrictions.



	Favorable Policies	Unfavorable Policies
Federal	<ul style="list-style-type: none"> <li>• Availability of BOEM leases</li> </ul>	<ul style="list-style-type: none"> <li>• Phased out ITC</li> </ul>
State	<ul style="list-style-type: none"> <li>• Increasing RPS requirements</li> <li>• Legislative or executive action to require OSW development</li> <li>• De-risking project sites</li> <li>• Port development</li> </ul>	<ul style="list-style-type: none"> <li>• Undefined OREC rules</li> <li>• Lack of governor commitment</li> <li>• Overly restrictive local content or cost reduction requirements</li> </ul>

# IN WHAT WAYS HAS THE OFFSHORE INDUSTRY MADE THE MOST PROGRESS IN THE US? WHERE DOES THE INDUSTRY IN THE US HAVE THE MOST POTENTIAL FOR ADVANCE?

**Northeastern and Mid-Atlantic states have created market visibility acting independently. Future progress will be accelerated by regional cooperation in multiple areas.**

<b>Current: Individual State Policies</b>	<b>Future: Regional Cooperation</b>
<ul style="list-style-type: none"><li>• MA: legislation requires 1.6 GW by 2030</li><li>• NY: OSW goal of 2.4 GW by 2030</li><li>• NJ: OSW goal of 3.5 GW by 2030</li><li>• MD: 368 MW in ORECs to 2 projects</li><li>• CT: RFP for ~200 MW OSW</li><li>• RI: RFP for 400 MW renewables incl. OSW</li></ul>	<ul style="list-style-type: none"><li>• Coordinate timing of directed procurement</li><li>• Green Bank</li><li>• De-risk or pre-permit sites</li><li>• Coordinate transmission build</li><li>• Port and related infrastructure development</li><li>• Public support for vessels</li><li>• Regional supply chain development</li><li>• Basic research</li></ul>

## WHICH PORTS ARE MOST PRIMED FOR OFFSHORE PROJECTS AT SCALE?

**Most eastern seaboard states have viable candidates for ports to service OSW projects. However, only a handful of ports are close to meeting the ever-increasing requirements.**

### Port Requirements to Support a 700 MW OSW Project with 8 MW Turbines

Most  
common  
improvement  
required →

Feature	Minimum Requirements
Construction & component storage area	60,000-75,000 m <sup>2</sup> (646,000-807,000 ft <sup>2</sup> )
Construction/storage area load-bearing capacity	10-20 tons/m <sup>2</sup> for foundations, 10 for towers
Warehouse area	1,000-2,500 m <sup>2</sup> (11,000-27,000 ft <sup>2</sup> )
Dockside (quayside) draft depth	7.7 m (24 ft)
Length of dedicated dockside access	100 m (preferably 200 m)
Truckload bearing capacity	12 tons

Sources: AWS Truepower, GL/GH, Kinetik Partners, BVG Associates

#### Most feasible OSW ports:

- New Bedford, MA
- Quonset, RI
- Howland Hook Marine Terminal, NY
- Baltimore, MD
- Portsmouth, VA

#### Honorable Mention:

- Searsport, ME
- Paulsboro, NJ
- Wilmington, DE
- Moorhead City, NC
- Galveston, TX