

# Development of Human Activities in the North Sea

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Bonn Secretariat

# EWEA Members – Across entire supply chain



**EWEA**  
THE EUROPEAN WIND ENERGY ASSOCIATION



GE Energy



**VATTENFALL**

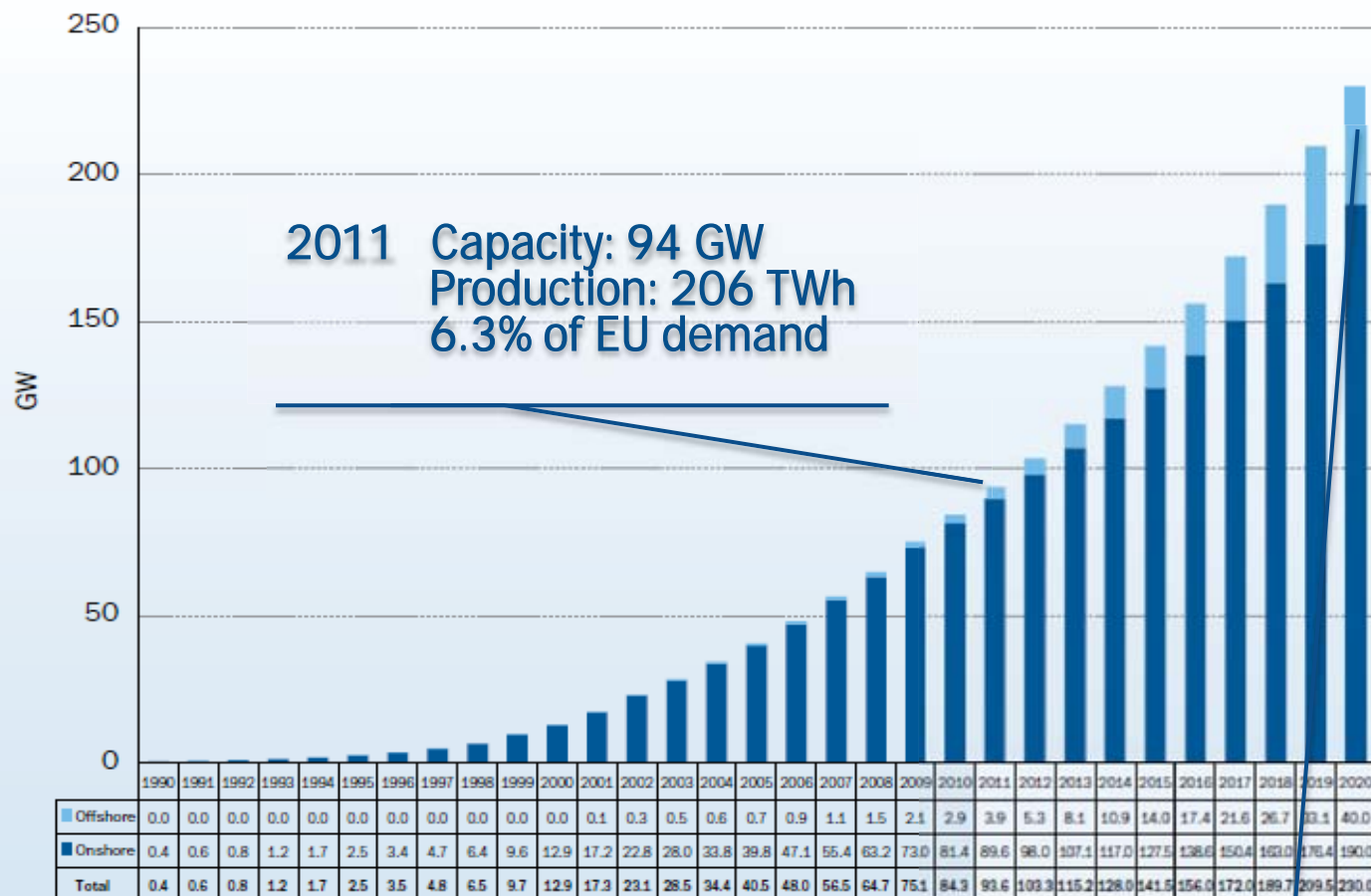


**Vestas**

Wind. It means the world to us.



# EWEA Wind Energy scenario to 2020



Similar targets in other 2020 scenarios...  
IEA = 199 GW NREAPs = 213 GW EC = 222 GW

2020 230GW  
581 TWh  
16% of EU demand



## European offshore wind energy market in 2011

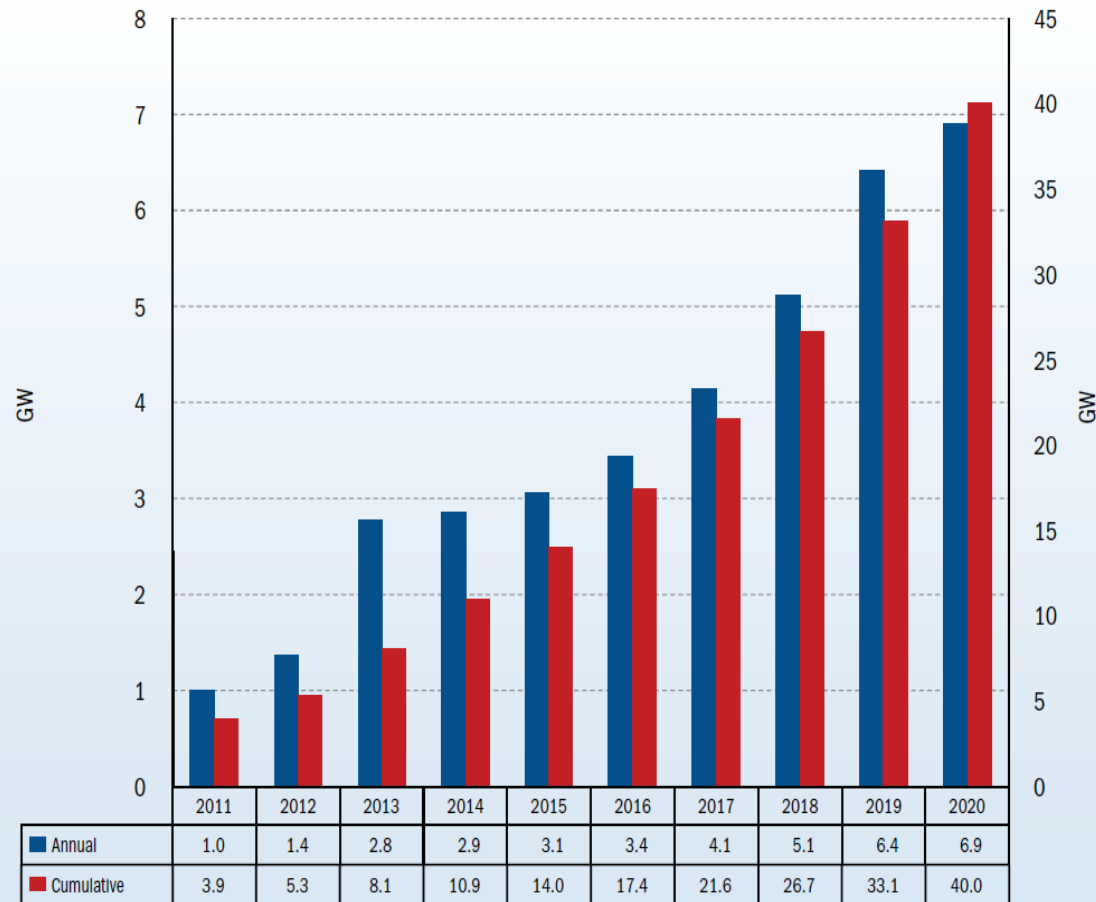
- In 2011, 3.8GW offshore wind capacity installed across 53 wind farms in 10 European countries
- Worth €2.4bn annual investments
- 59% capacity installed in the North Sea
- Using around 2,400 km<sup>2</sup> sea space



## Offshore wind energy market in the EU in 2020 & 2030

- 40GW by 2020 and 150GW by 2030
- Meeting 4% and 14% of total EU electricity demand in 2020 and 2030
- Using 25,000 km<sup>2</sup> sea space in 2020

# Offshore wind energy market in the EU 2011 – 2020 (MW)



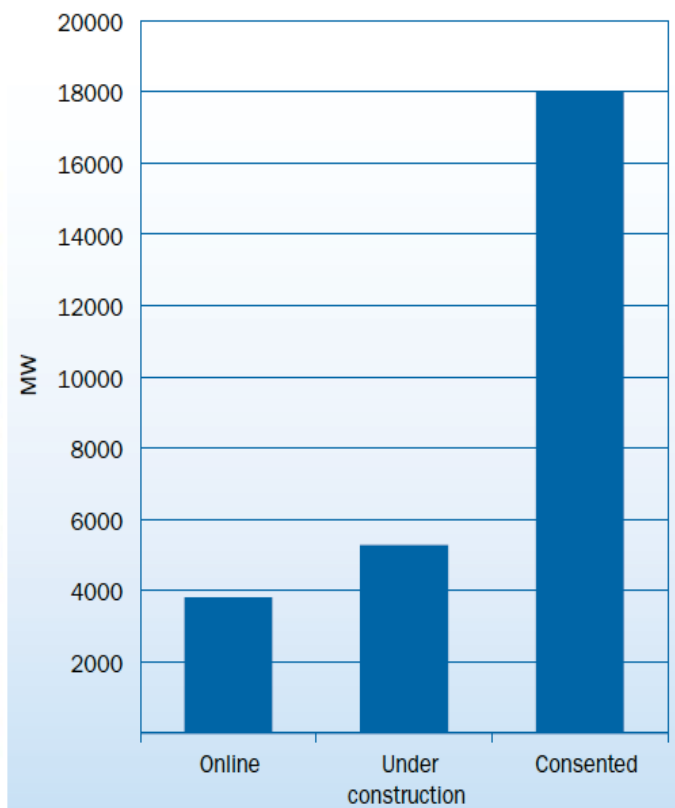
- 2012: annual installations of around 1.4 GW
- 2020: annual installations of 6.9 GW
- 2020: cumulative installations of 40 GW

## 2012 and beyond

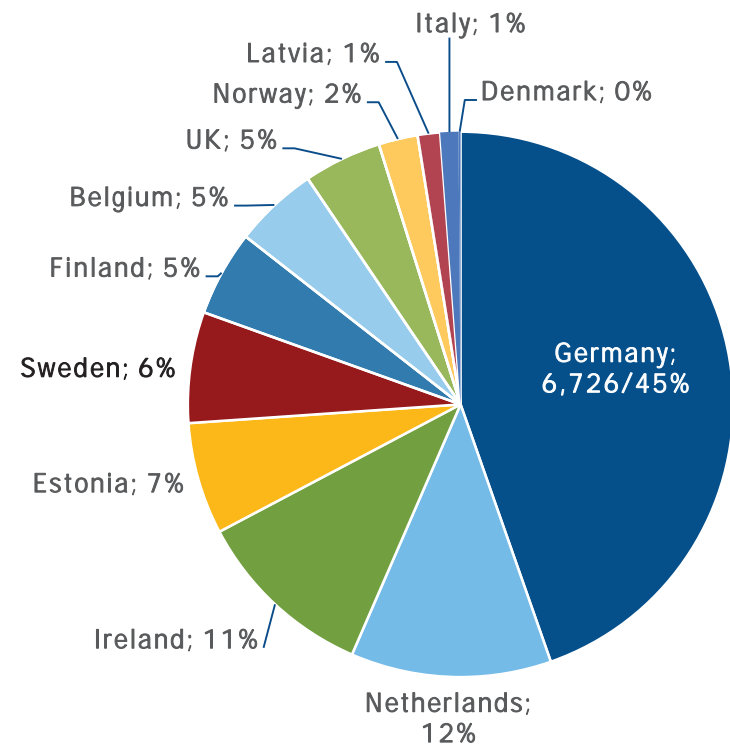
- 9 offshore projects under construction
  - Increase installed capacity by 2,375 MW
  - Bringing cumulative capacity in Europe to 6,188 MW
- Preparatory work has started on 9 other projects
  - cumulative installed capacity of 2,910 MW
  - Bringing cumulative capacity in Europe to 9,098 MW



Online, underconstruction and consented projects at end 2011 (MW)



Share of consented offshore capacity

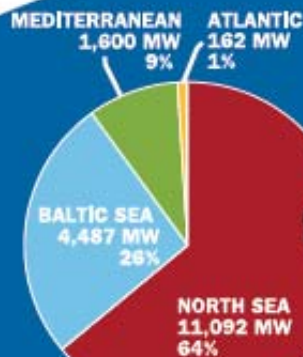




# MARKET OUTLOOK

Capacity of government concession zones or foreseen future tender zones: 73,695 MW

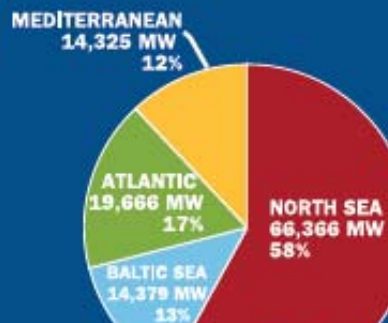
**CONSENTED**  
17,341 MW



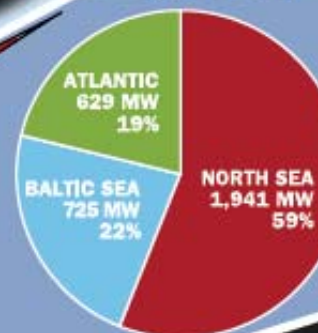
**UNDER CONSTRUCTION**  
5,603 MW



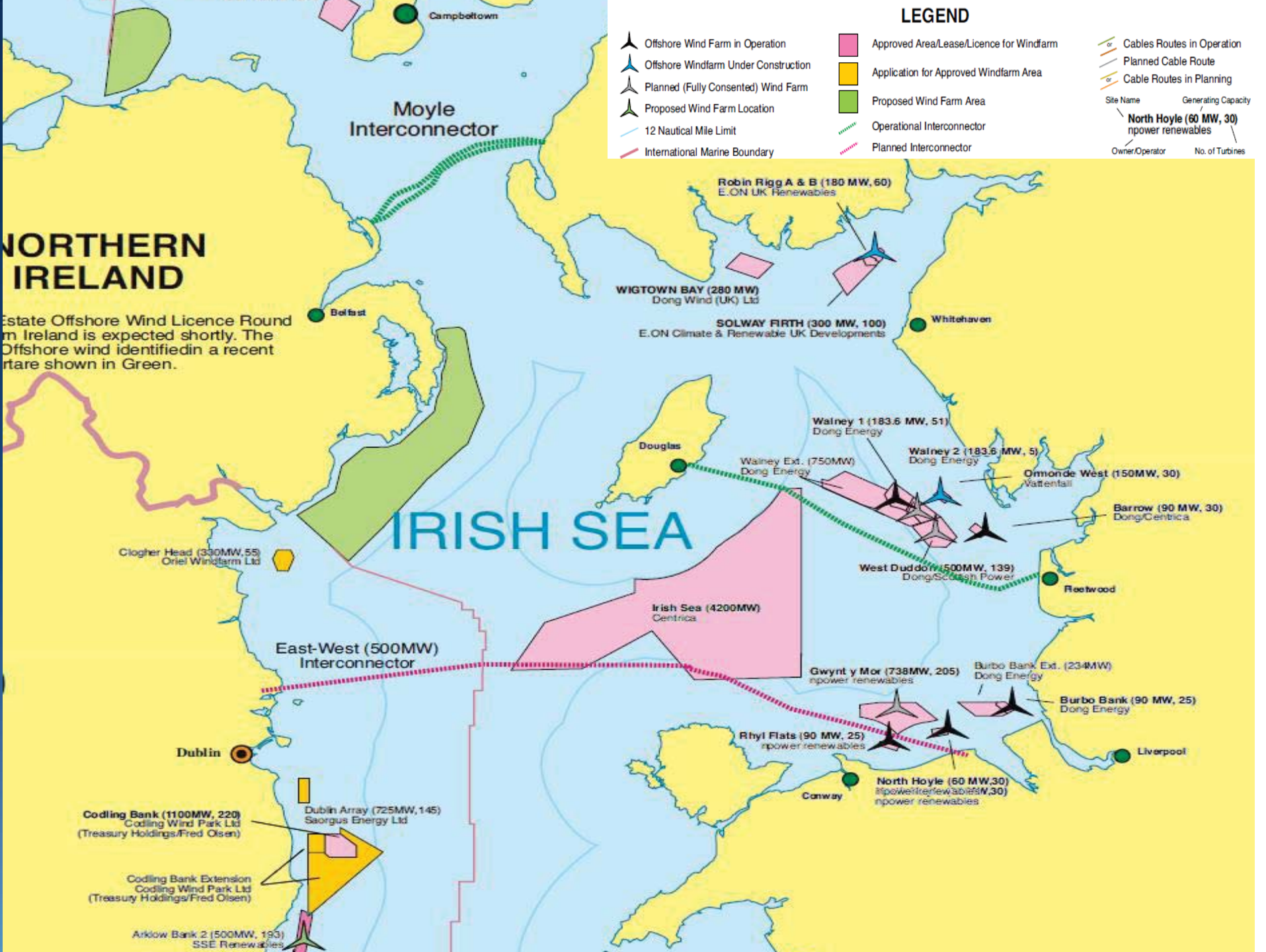
**PLANNED**  
114,737 MW



**ONLINE**  
3,295 MW

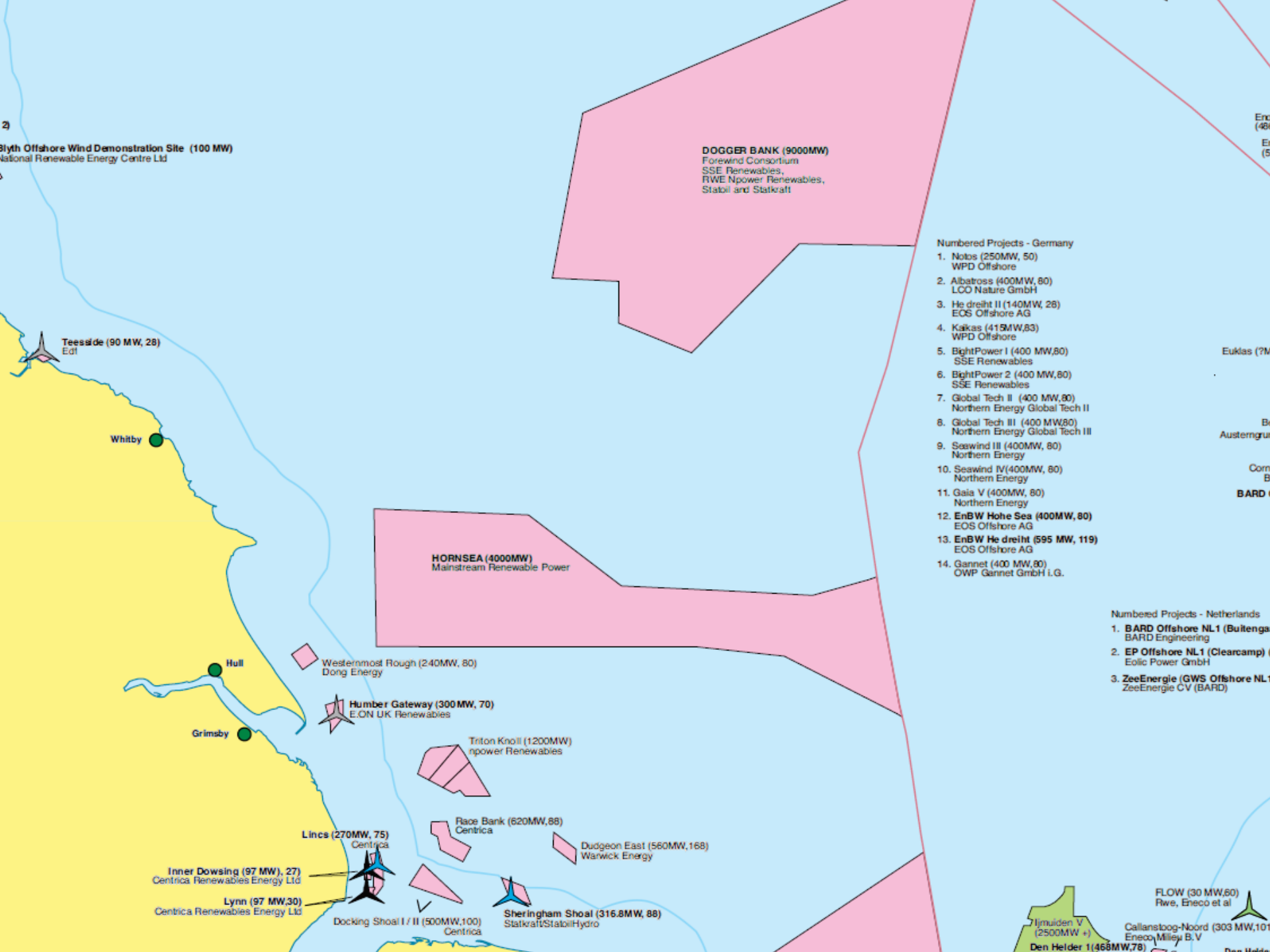


**TOTAL EUROPE**  
140,976 MW







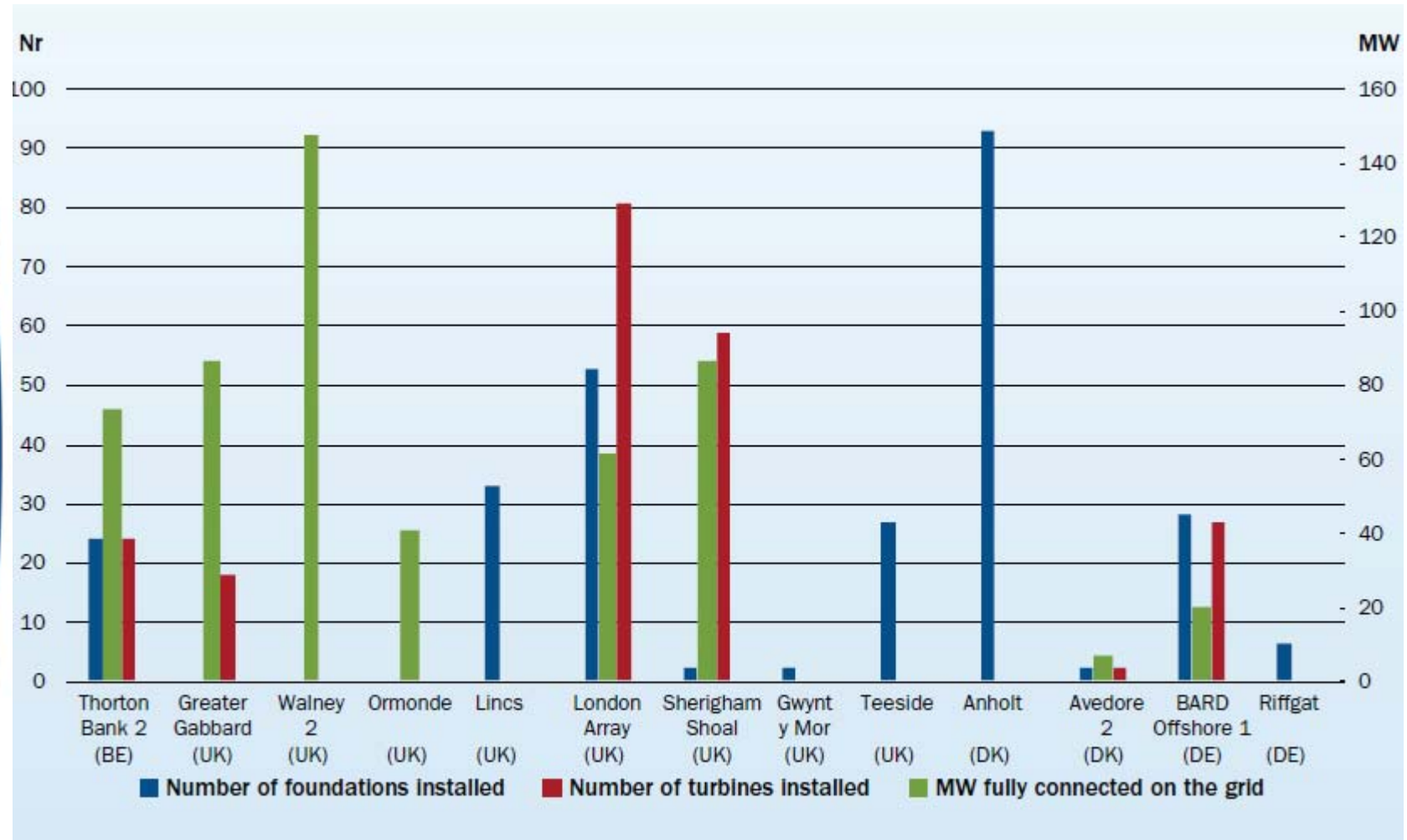






# Progress in 2012

Installation and Grid connection between 01/01/2012-30/06/2012  
(EWEA Mid-year Statistics, 2012):



## EWEA studies for reference:

*EWEA Pure Power III: Wind energy targets for 2020 and 2030 (2011)*

[http://www.ewea.org/fileadmin/ewea\\_documents/documents/publications/reports/Pure Power III.pdf](http://www.ewea.org/fileadmin/ewea_documents/documents/publications/reports/Pure_Power_III.pdf)

*EWEA Wind In our Sails (2011):*

[http://www.ewea.org/fileadmin/ewea\\_documents/documents/publications/reports/234 20 Offshore report web.pdf](http://www.ewea.org/fileadmin/ewea_documents/documents/publications/reports/234_20_Offshore_report_web.pdf)

*SEANERGY2020 final report:*

[http://www.ewea.org/fileadmin/ewea\\_documents/documents/publications/reports/Sea nergy 2020.pdf](http://www.ewea.org/fileadmin/ewea_documents/documents/publications/reports/Sea_nergy_2020.pdf)

*EWEA Offshore wind key trends and statistics 1<sup>st</sup> half 2012 (2012):*

[http://www.ewea.org/fileadmin/ewea\\_documents/documents/publications/statistics/EWEA OffshoreStats July2012.pdf](http://www.ewea.org/fileadmin/ewea_documents/documents/publications/statistics/EWEA_OffshoreStats_July2012.pdf)

*EWEA Offshore wind key trends and statistics for 2011 (2012):*

[http://www.ewea.org/fileadmin/ewea\\_documents/documents/publications/statistics/EWEA stats offshore 2011 02.pdf](http://www.ewea.org/fileadmin/ewea_documents/documents/publications/statistics/EWEA_stats_offshore_2011_02.pdf)



# So what is a marine spatial plan?

“The process of analyzing and allocating parts of three-dimensional marine spaces (ecosystems) to specific uses, to achieve ecological, economic and social objectives that are usually specified through a political process.”

**Ehler & Douvere,  
2007.**

# And how do you make one?

**Establish the current situation**

**Identify optimal locations for each activity**

**Identify conflicts between activities**

**Prioritise spatially conflicting activities**

**Produce a map to show the areas prioritised for various activities**

# Issues in creating a plan

Data collection:

- Scale
- Accuracy

Data collation:

- Technical capability
- Metadata accuracy

Trans-boundary co-operation:

- National interests and jurisdictions
- Cumulative and long distance effects

# Stage 1 – Mission Statement

Promote national MSP to meet common regional objectives

Example objectives include:

- **Balancing** ecological, sociological and economic aspects.
- **Allocating** space to minimise conflict
- **Using** MSP as a tool for sustainable development
- **Co-operating** to avoid trans-boundary pollution or conflict.

# Stage 2 – Collating the Data

**Identify** areas of conflict between activities and the environment. These are applicable to all regions

**Appreciate and promote** the need for full and accurate information

**Co-ordinate** core information to ensure comparability.

**Catalogue** or collate the data in a central database

# Stage 3 – Make regional plans

With data available, conduct GIS analysis to identify conflict areas.

Understand the national targets and absorb them into regional targets.

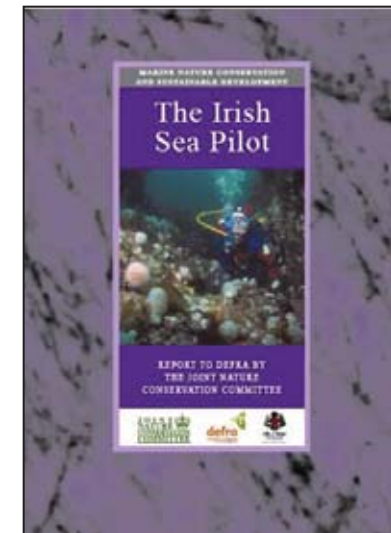
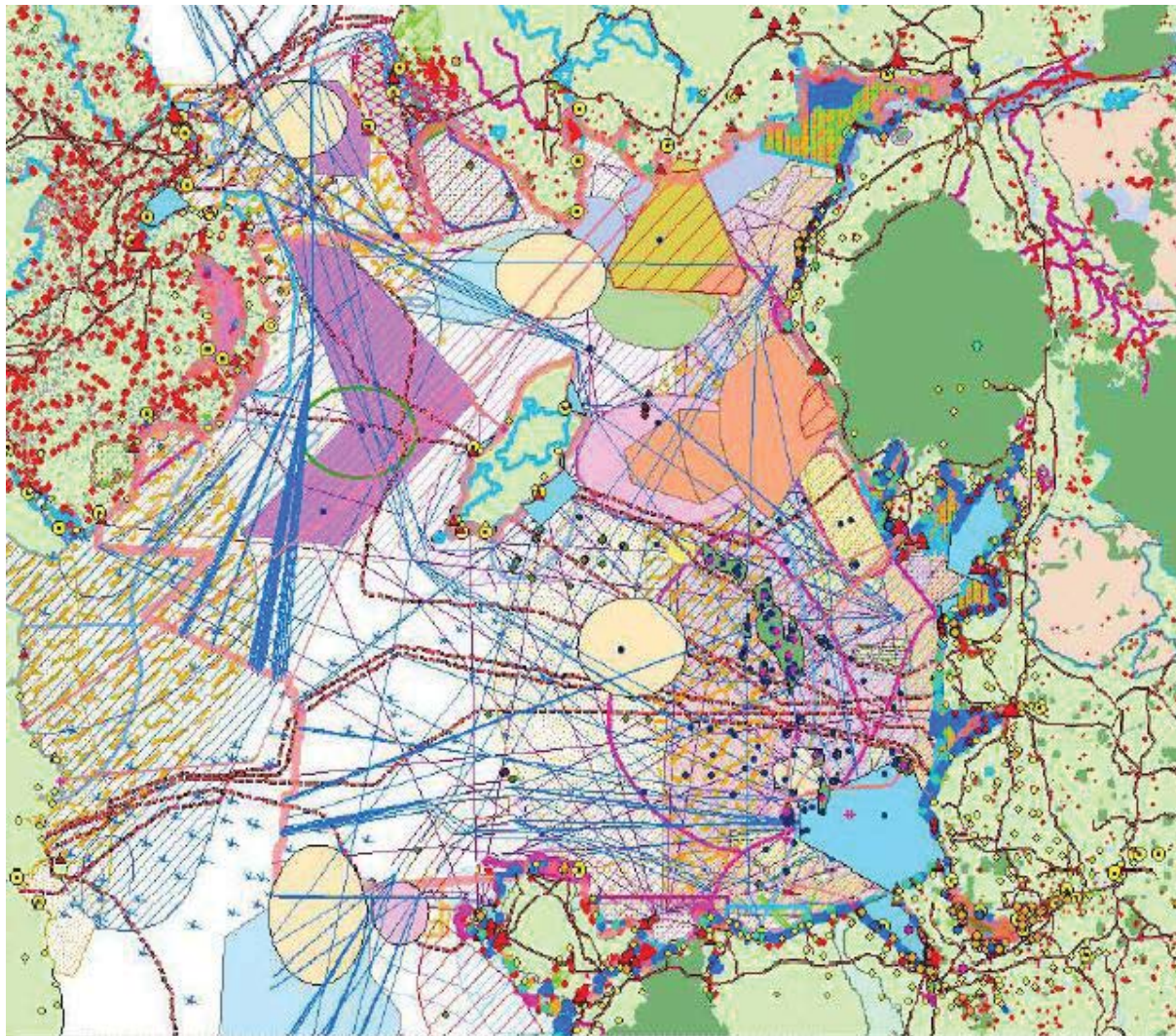
Create a visual impression of the area in 25 years time.



# Marine Spatial Planning and Management



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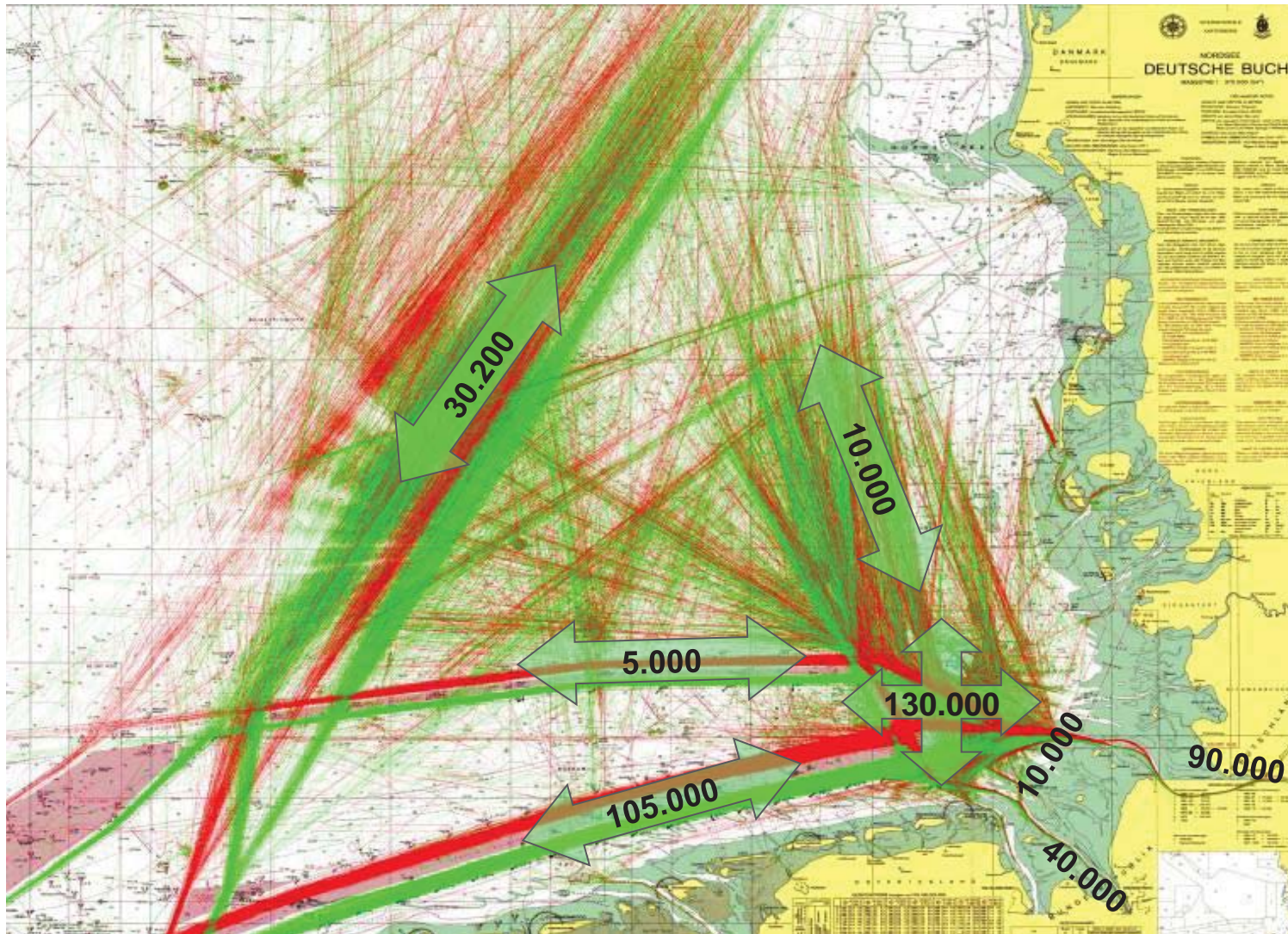
Because of increasing use demands and potential conflicts between different uses and/or with marine nature conservation (ecosystem sea) there is a need for integrated, comprehensive sustainable management of human activities

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[www.baltseaplan.eu](http://www.baltseaplan.eu)





# analysis of ship traffic

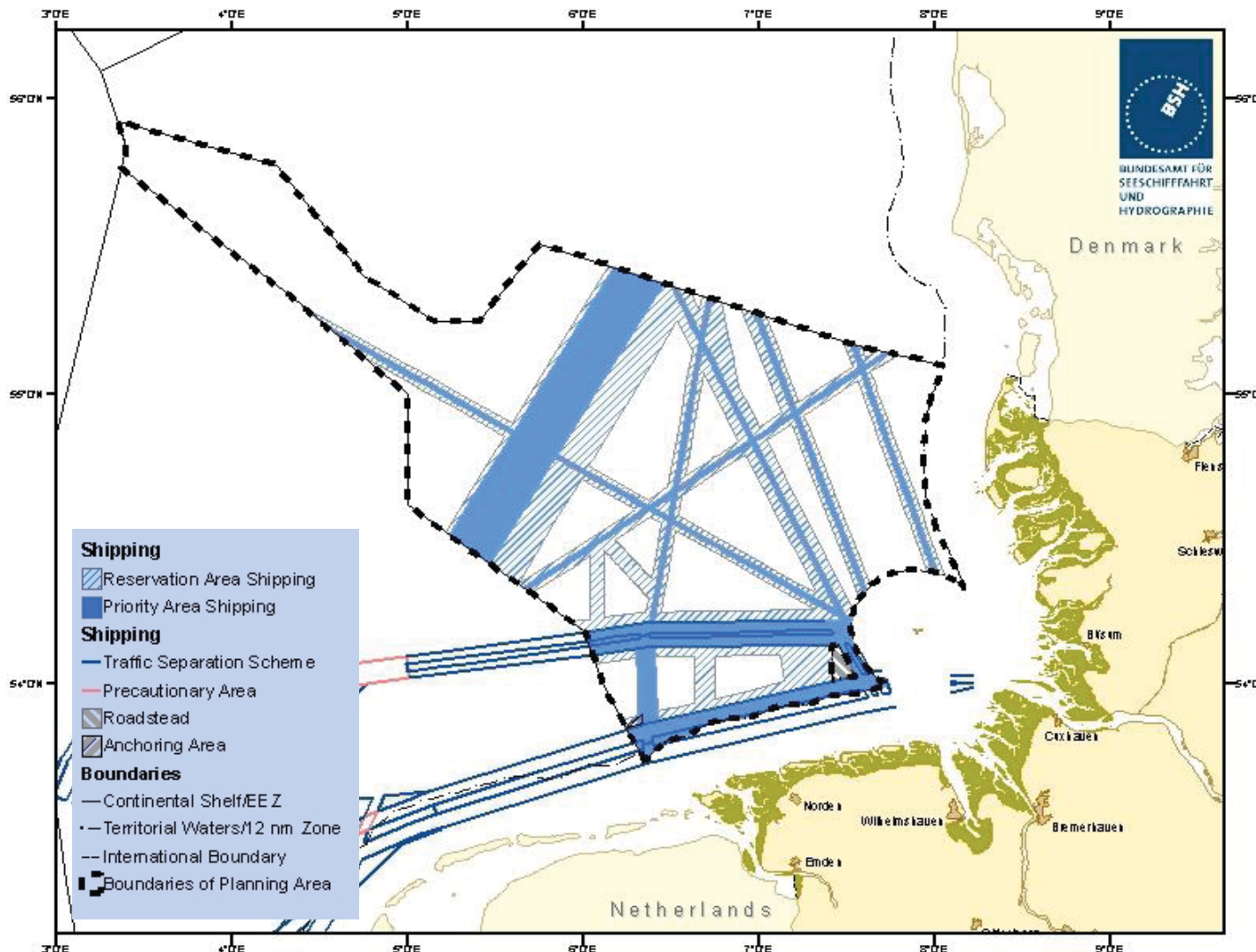


Analysis based  
on AIS-  
information by  
Water- and  
Shipping  
Administration

red: westbound  
traffic

green:  
eastbound traffic



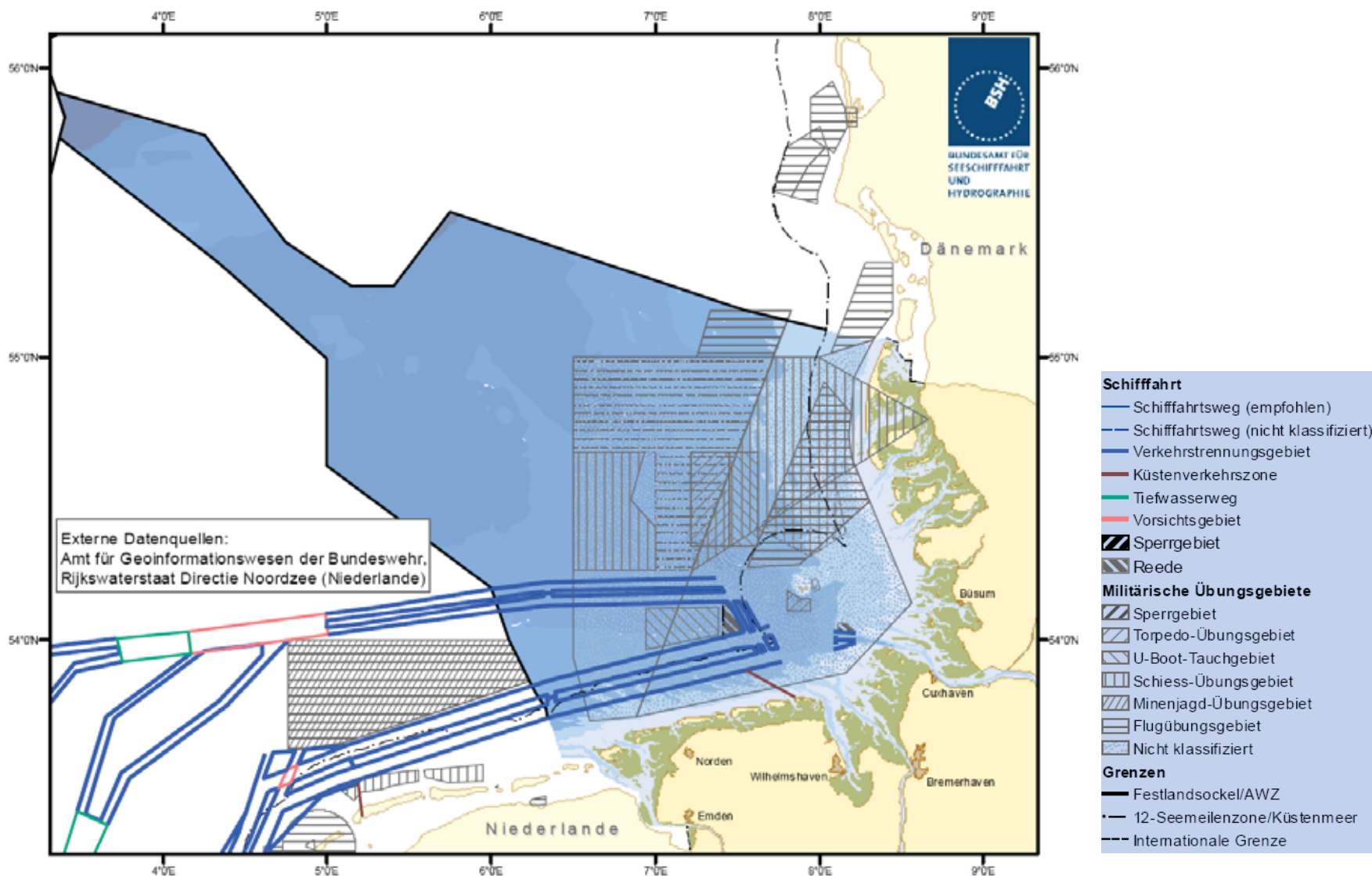


- Shipping lanes as basic structure of the draft (Art. 60 VII UNCLOS)
- priority areas: must be kept free from obstacles
- reservation areas: shipping has special weight in balancing process
- no traffic regulation!!!! (protection of existing traffic)

# Shipping and military training areas

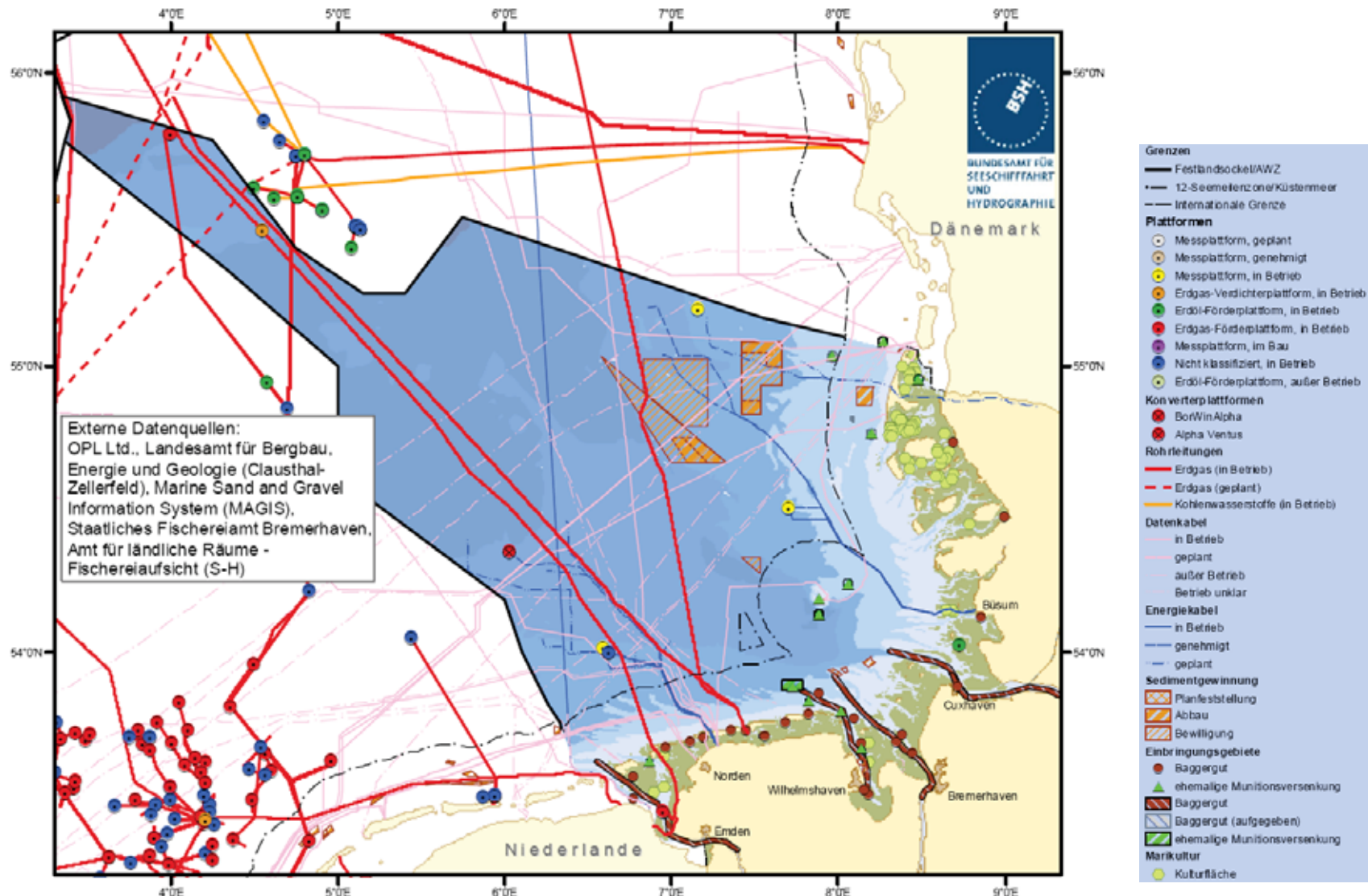


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# Platforms, pipelines, cables, sand extraction, mariculture



# Spatial claims by Offshore Windparks

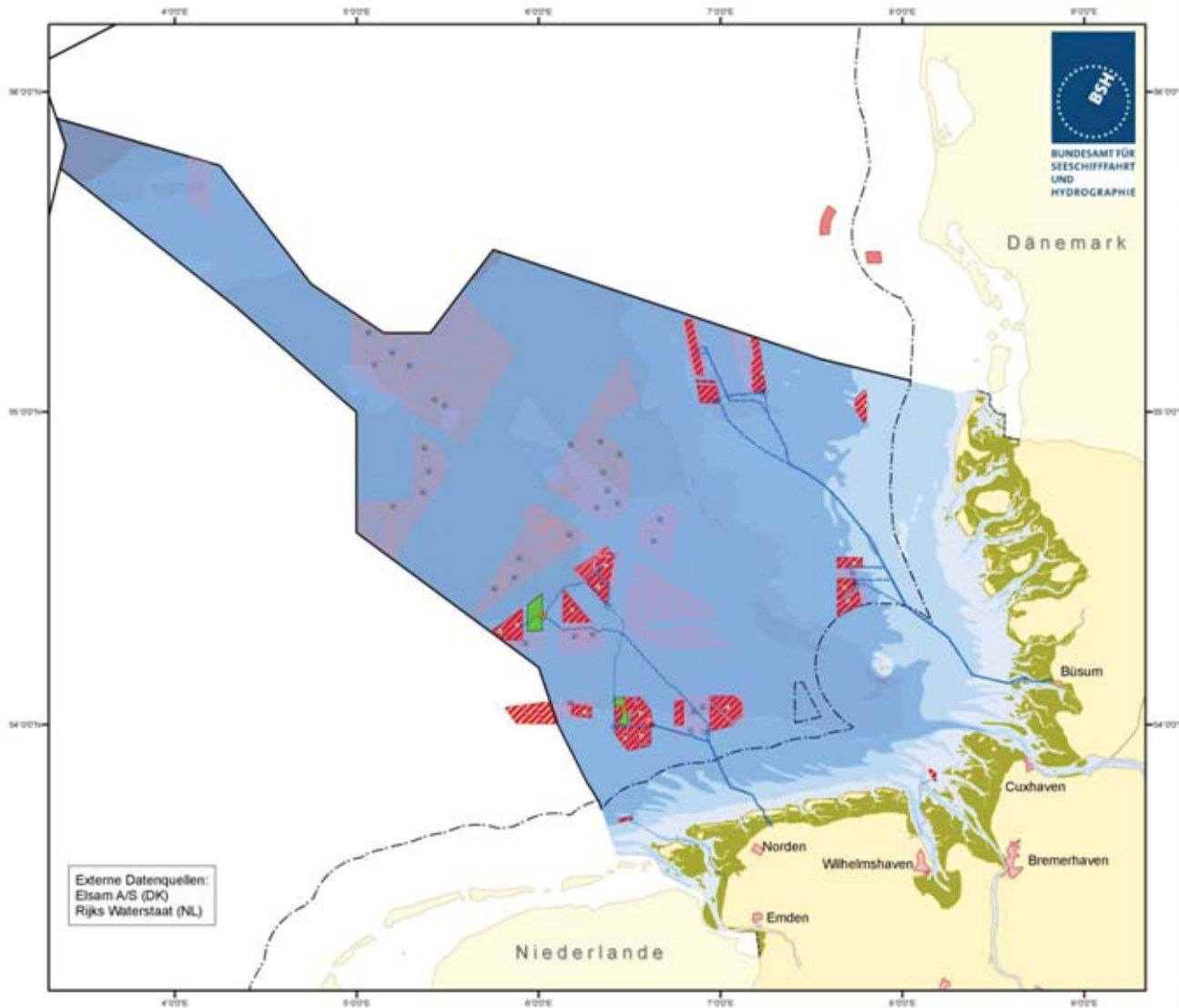
- Target in D: 25.000 MW Offshore Windenergy by 2030 in the EEZ and the territorial sea
- Based on turbines with 3 bis 5 MW: 5.000 up to 8.000 turbines necessary
- Renewable Energy Act: 35 % of the electricity supply must be from renewable energy by 2020
- Coverage of ca. 15 % of the German EEZ



# Windenergy projects: more than 100



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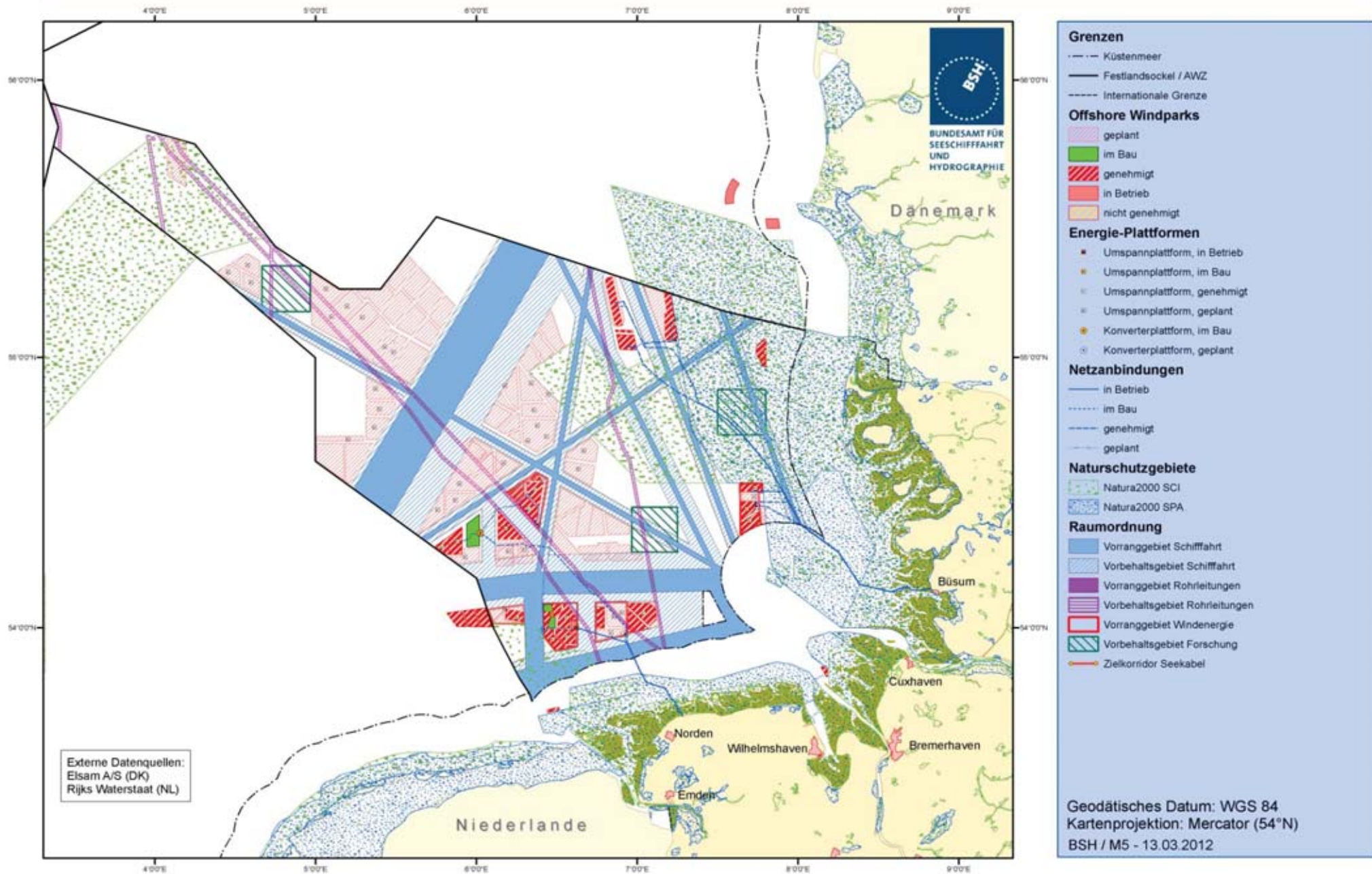
## Grenzen

Küstenmeer

- 29 **licences** (2081 WEA, equals roughly 9.000 MW)
- 26 in North sea (1841 WEA)
  - 3 in the Baltic sea (240 WEA)
  - alpha ventus (12 WEA) producing electricity;
- 76 applications for 5752 WEA
- BARD and Borkum West 2 under construction



# Nordsee: Offshore Windparks

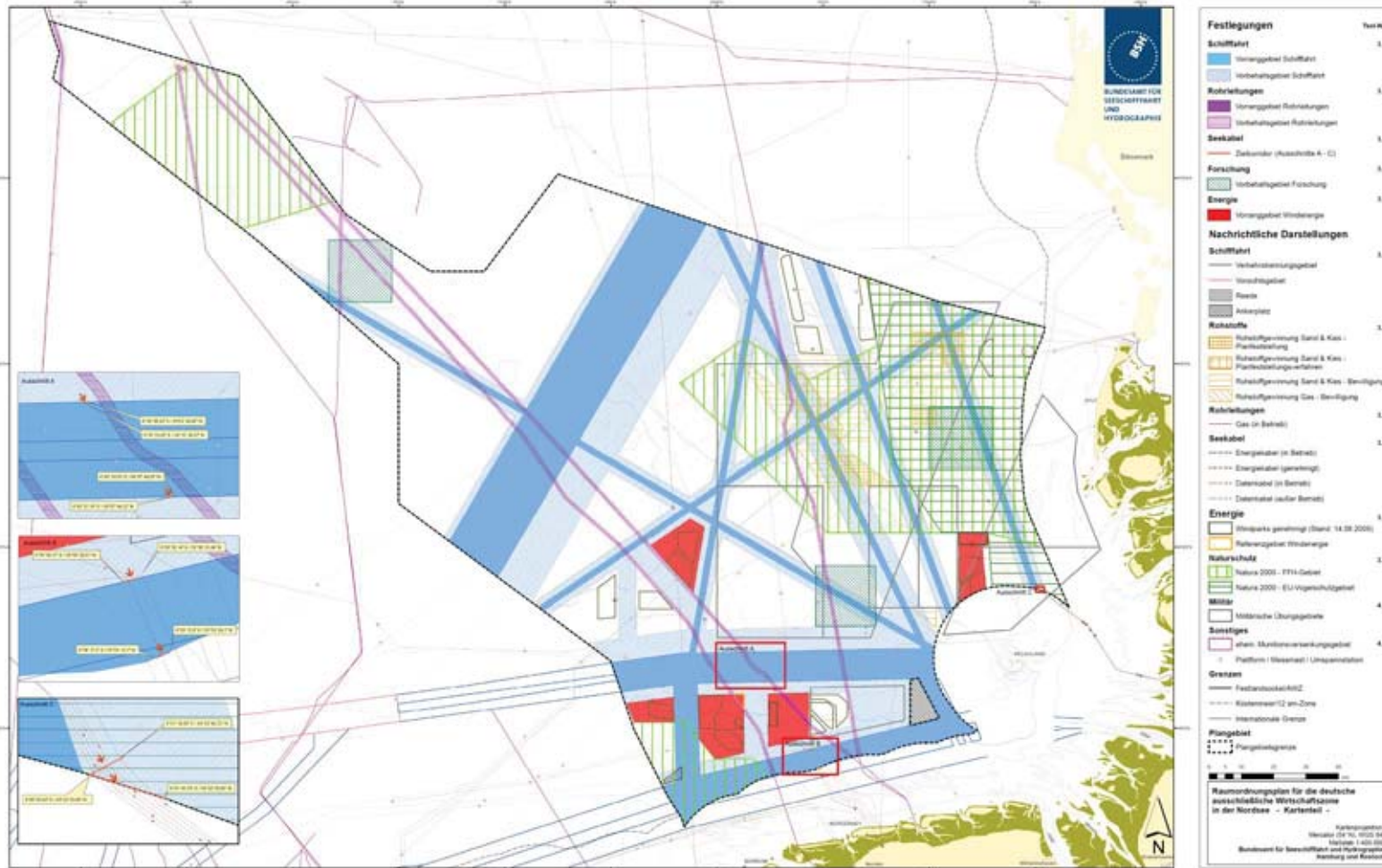


# Spatial Plan for the EEZ in the North sea



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## Raumordnungsplan für die deutsche ausschließliche Wirtschaftszone in der Nordsee - Kartenteil -



designations:

Priority areas for  
wind energy (red)

Priority areas for  
shipping (blue)

Importance of  
environment: no  
turbines in Natura  
2000 areas!

gates for electricity  
cables to the coast

set into force on  
26th September  
2009



For the first time a large scale SEA has been carried out in a sea area distant from the coast

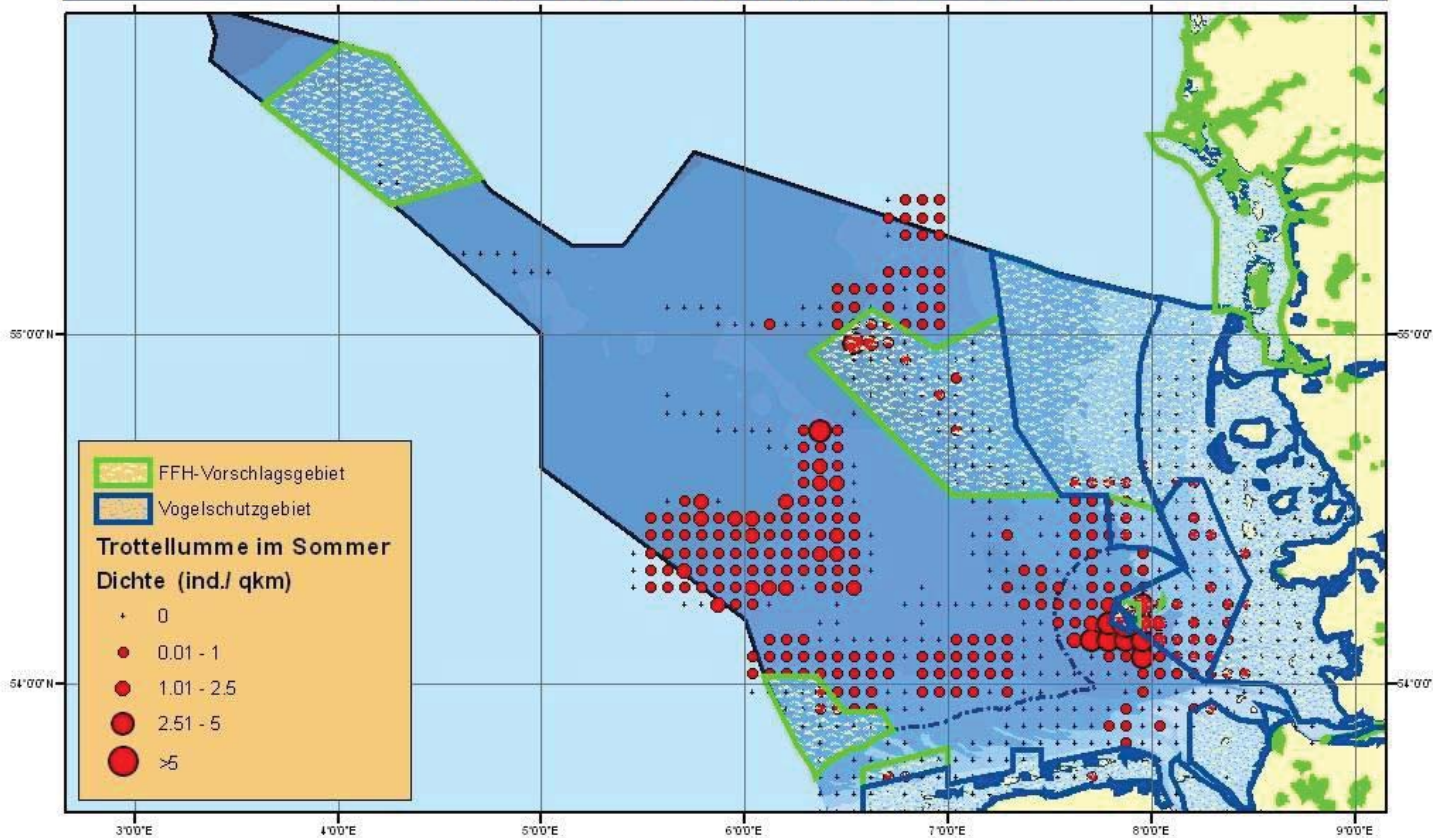
Main content of the report:

- description and evaluation of state of the marine environment
- description and assessment of any substantial impacts on the marine environment that are likely to be caused by the implementation of the plan

Result of SEA: no substantial impacts on the marine environment by the designations of the plan

# Analysis for Strategic Environmental Assessment

Trottellumme im Sommer - 16.04. bis 30.06 - in der deutschen Nordsee  
schiffsgestützte Zählungen 2000 - 2006



Common guillemot (*Uria aalge*):  
example for a large scale analysis by connecting information from private and public sources

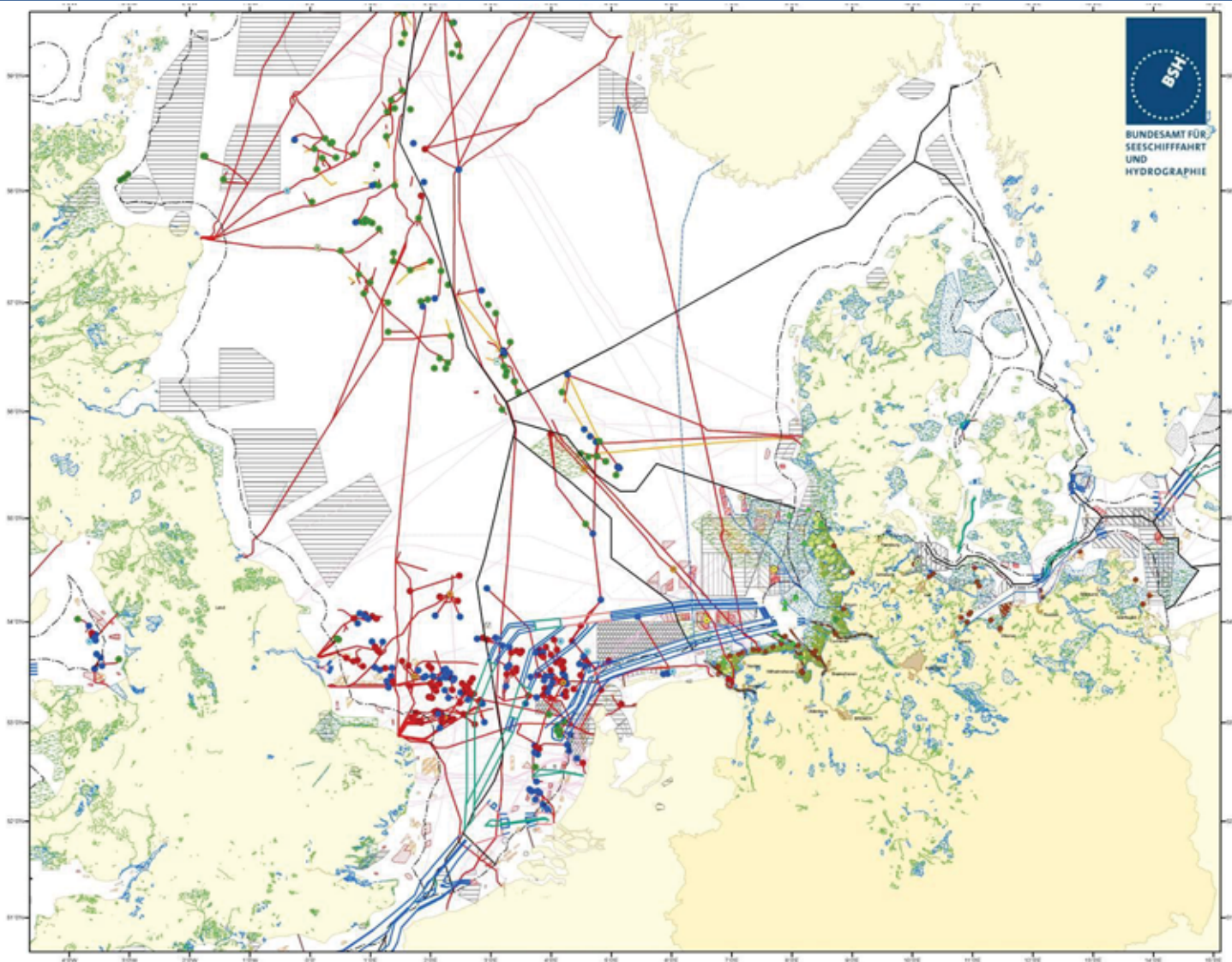
**Auswertung: Forschungs- und Technologiezentrum Westküste  
der Christian-Albrechts-Universität zu Kiel und BSH**



# International Cooperation

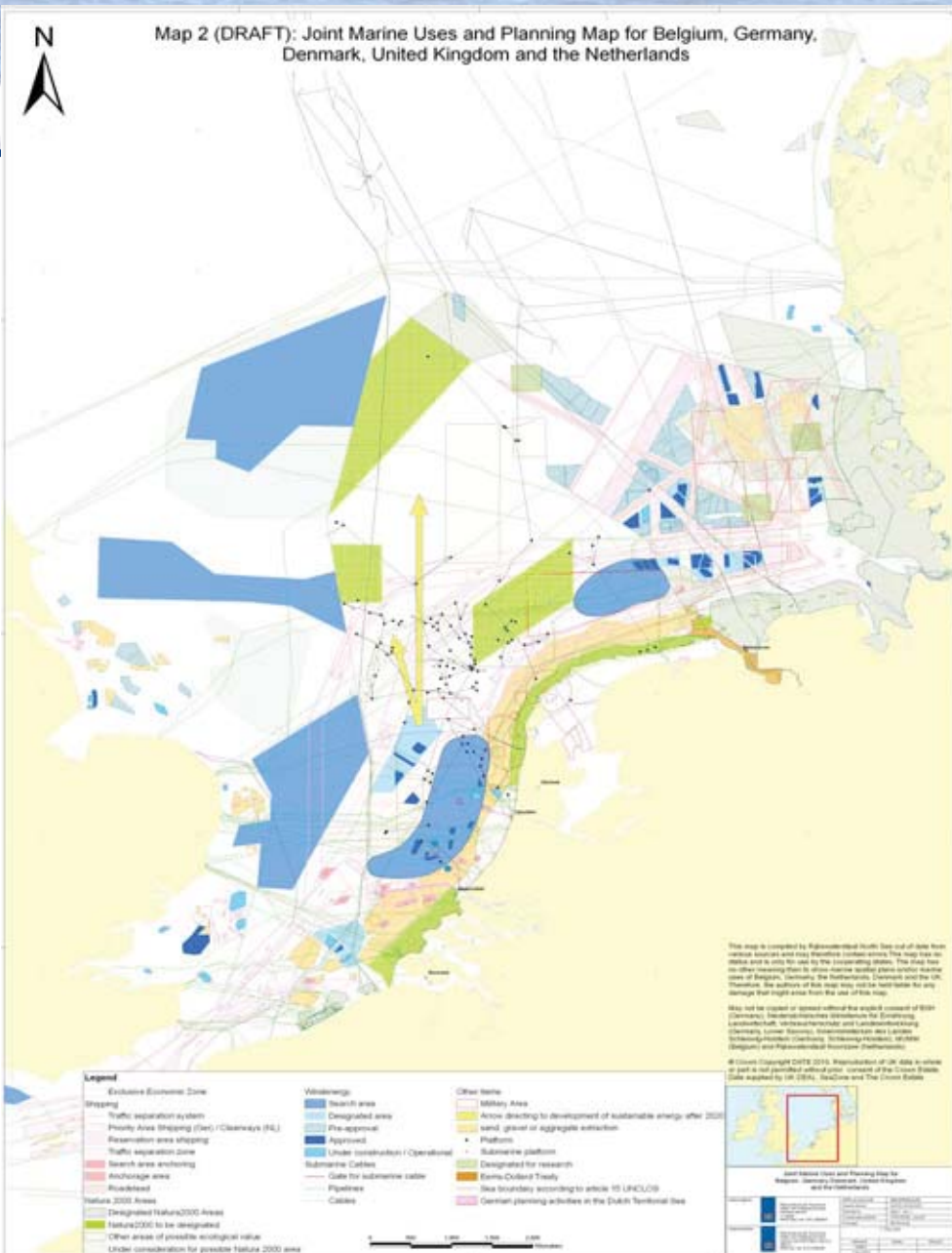


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Transboundary cooperation and planning very important because of transnational uses and marine conservation issues





# Conclusions

**Promoting** national marine spatial planning to meet common regional objectives

**Highlighting** the need for bi-lateral communication

**Providing** guidelines for the common collection and exchange of data

**Streamlining** reporting requirements

**Steering** the reporting requirements to meet the future EU Marine Strategy Framework Directive