

Market study

The Market for Offshore and Onshore Wind Energy in France until 2030



- General framework having an impact on the expansion of wind energy in France
- Modification of the authorization procedures for Onshore-Wind farm projects (ZDE and SRCAE)
- Actual call for tenders for offshore wind farms in France
- Market structure and major competitors
- Development of wind energy in three scenarios with different premises.

The development of wind energy in France is compared to other European countries still far behind. So far, only onshore wind farms have been installed although the first call for tender for offshore wind farms took place in 2004 and the construction of the first offshore wind farm was already approved in 2008. Yet, due to several judicial procedures, the construction of this offshore wind farm still has not begun and might never become profitable. It should therefore be transformed into a demonstration project, kind of a French “alpha ventus”.

Nevertheless, the French government aims at building a total wind capacity of 25,000 MW by 2020, splitted between 19,000 MW onshore and an offshore wind capacity of 6,000 MW. Currently, the first call for tenders for Offshore-Wind farms has started and many consortiums were set up by big French utilities. The bids can be submitted until 12 January 2012 and the winners are expected to be announced by the French government in April 2012.

We established scenarios underlining the development of the offshore wind energy until 2030. Contrarily to the government, we do not expect a start of operation of the offshore wind farms in 2015, but in 2016 or even 2017, delays in the construction are not be excluded due to lawsuits or shortage in required infrastructures.

While the attention is currently concentrated on offshore wind energy, the potential for onshore wind energy has not been exhausted. If some regions are tackling the issue very actively, the national government tightens up the authorization procedures for onshore-Wind farms. As a result the onshore target appears as unrealistic and too ambitious.

The market study “The Market for Wind Energy in France until 2030” presents actual and future developments of offshore and onshore wind energy in France by depicting the general context and planned capacities. This allows the examination of the market expansion according to different scenarios.

In addition, the study provides answers to the following questions:

- What is the current approval procedure of wind farms?
- What are drivers and barriers to the expansion of the market?
- What is the current situation in the call for tenders for offshore wind farms?



Illustration 1: French offshore development areas within the first round of call for tenders and harbours for the offshore wind energy (Source: CRE, 2011)

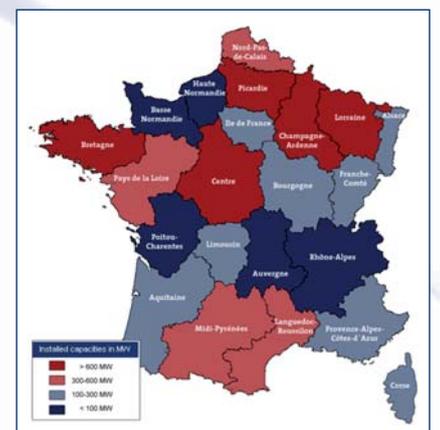


Illustration 2: Actual installed capacities of onshore wind energy in French Régions (Source: wind:research, based on suivi-éolien)

Aims and benefits of the study

Based on the planned wind farm projects in France, this study provides an analysis of the development of capacities and prices in the market for wind energy in France until 2030. In addition to a quantitative analysis of the market shares and volumes, a qualitative approach presents the general framework of offshore wind energy in France (legal, economic but also barriers and drivers of the market).

Methodology

Wind research uses a variety of field and desk research methods. In addition to extensive intra- and internet-database analyses (including magazines, publications, conferences, annual reports, etc.), interviews took place with the following target groups:

- equipment manufacturers
- suppliers
- project developers
- wind farms operators
- port authorities
- experts

To whom the study is addressed

The market study provides French and foreign manufacturers, suppliers, project developers and service contractors with insights about the development of the wind energy sector in France until 2030. It depicts the current situation in both onshore and offshore markets and the potentials in those sectors. Moreover, it focuses on French market players so that foreign companies can understand and apprehend their position in the wind industry.

Thus, the study helps companies to derive appropriate strategies can be derived, not only for established companies in the wind sector, but also for potential new entrants.

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