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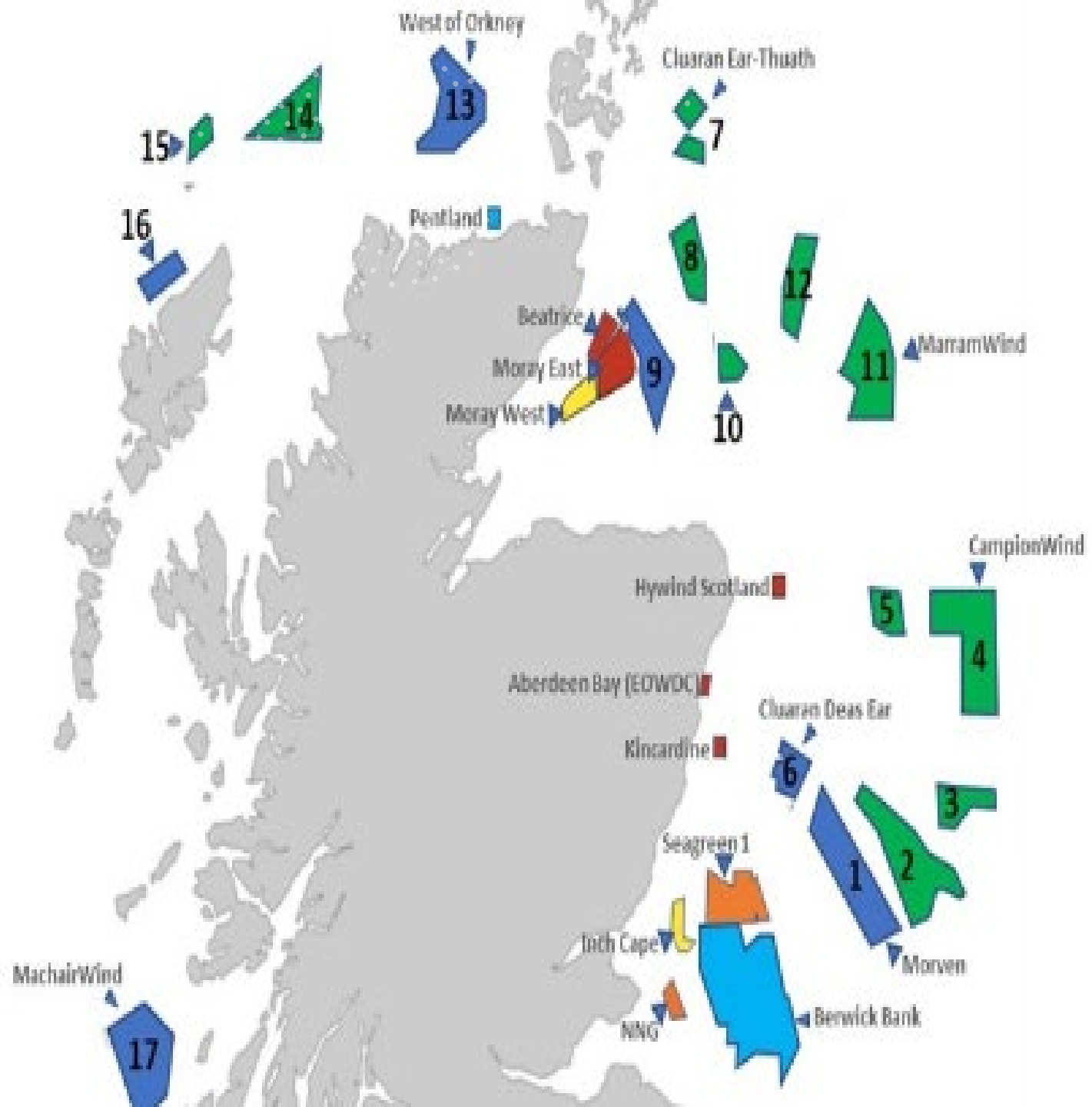
FIRST STEP IN SOLVING ANY PROBLEM IS RECOGNISING THERE IS ONE

- FISHING INDUSTRY AND OFFSHORE WIND ON A COLLISION COURSE?
- SPATIAL SQUEEZE IS HAPPENING NOW AND WILL ONLY INCREASE.
- DISPLACED FISHING ACTIVITY A REAL CONCERN FOR FUTURE FISH STOCKS.
- HOW CAN WE CO-EXIST?



SCOTWIND 1 & Round 3

- 4GW operational or under construction
- Scotwind 1 almost 25GW
- INTOG a further 4.5GW
- By 2033 OW capacity could reach 40GW

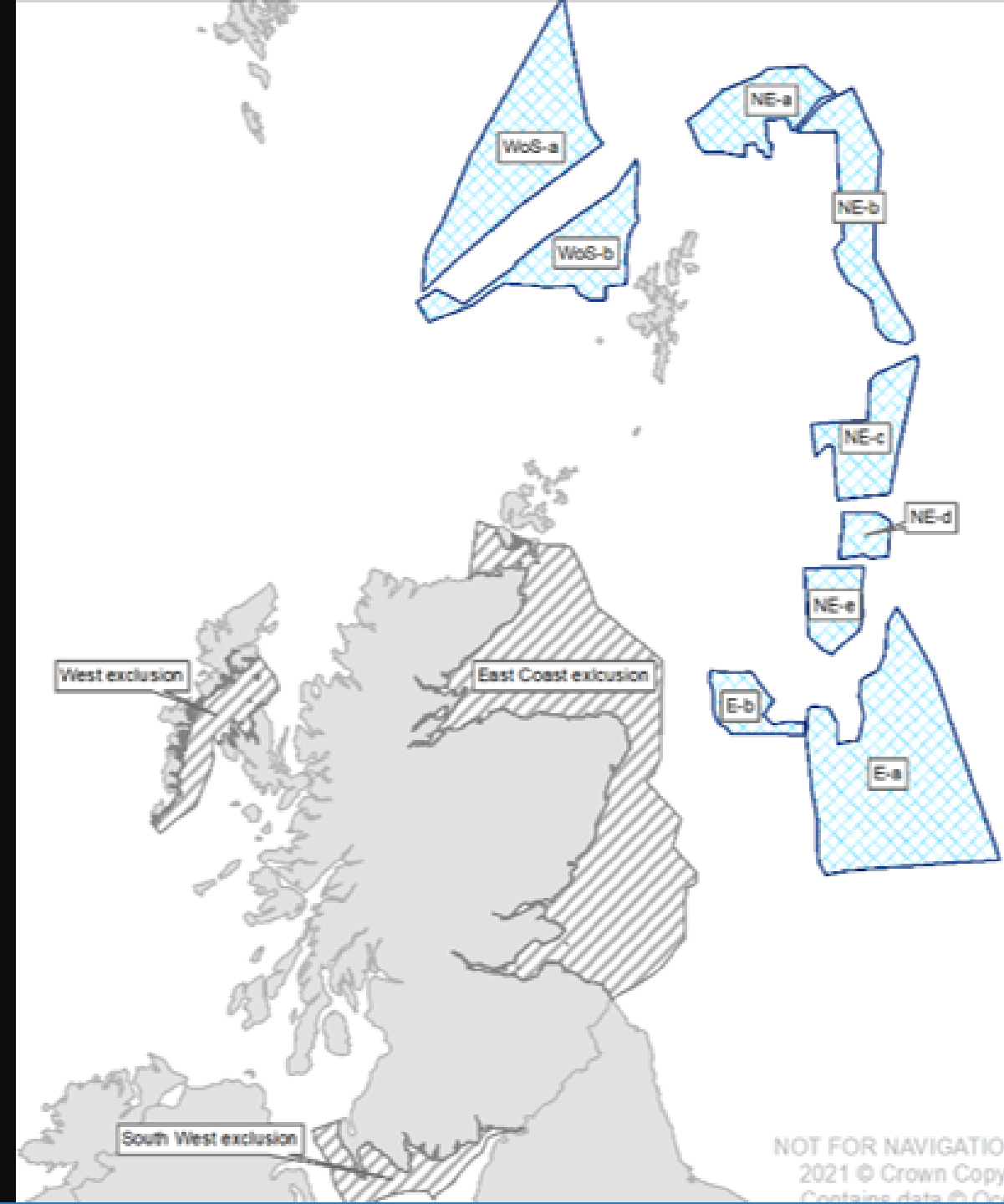


Current and Future

- Sites and Owners
- Total Output 39.8Gw

SITE	DEVELOPER	CAPACITY	
Robin Rigg	RWE Renewables	174MW	1892MW
Hywind Scotland	Equinor	30MW	
Aberdeen Bay	Vattenfall	93MW	
Levenmouth	ORE Catapult	7MW	
Beatrice	SSE/Red Rock Power	588MW	
Kincardine FOW	Cobra/Pilot Offshore	48MW	
Moray East	Ocean Winds	950MW	
NNG	EDF Renewables/ESB	448MW	1948MW
Seagreen 1	SSE Renewables/TotalEnergies	1080MW	
Seagreen 1a	SSE Renewables/TotalEnergies	420MW	2362MW
Inch Cape	Red Rock Power	1080MW	
Moray West	Ocean Winds	850MW	
ForthWind	Cierco	12MW	
Berwick Bank	SSE Renewables	4150MW	4250MW
Pentland FOW	Copenhagen Infrastructure Partners	100MW	
ScotWind 1	17 sites with multiple developers	24826MW	29326MW
INTOG	Various sites with developers TBC	4000MW	
INTOG Innovation	Various sites with developers TBC	500MW	

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- ScotWIND - INTOG
 - Sectoral Marine Plan for Offshore Wind for **Innovation and Targeted Oil and Gas Decarbonisation**.
 - Offshore wind areas to electrify of oil and gas infrastructure in Scottish waters (out to 200 NM).
 - Also examine potential options for smaller (<100 MW) innovation or test and demonstration projects.
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A large iceberg floats in a deep blue ocean under a bright blue sky with scattered white clouds. The visible tip of the iceberg is a jagged, snow-covered mountain peak. The submerged portion is much larger and more complex, with many smaller peaks and valleys visible beneath the surface. This visual metaphor represents the 'tip of the iceberg' concept, where a small visible part represents a much larger, hidden whole.

TIP OF THE ICEBERG

- 4Gw
- 50Gw to Install 2030
- 100Gw by 2050 in Scottish Waters
- UK Target greater than 145Gw by 2050

Co-Existence

Early Engagement

Governance

Lessons Learned

ENGAGEMENT PROCESS

FISHING INDUSTRY SHOULD BE INVOLVED AT THE LEASE OPTION PROCESS WITH GOVERNING BODIES

Screening: Meet with consenting authority, is EIA needed for project?

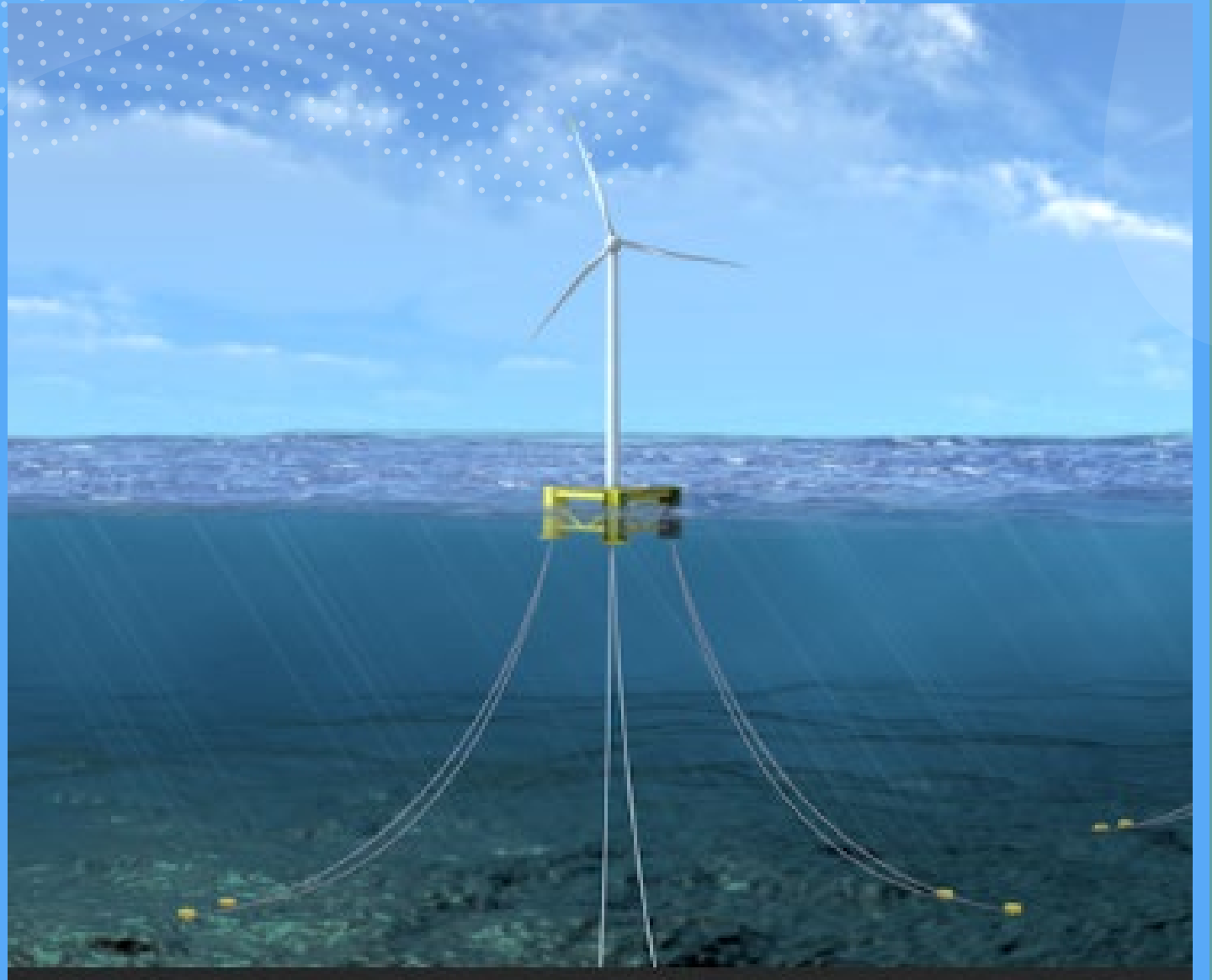
Scoping: Preliminary analysis of project impacts submit a scoping report to MS.

EIA: Detailed survey, modelling and stakeholder engagement to quantify potential impacts. Include mitigation in the project design to reduce impacts

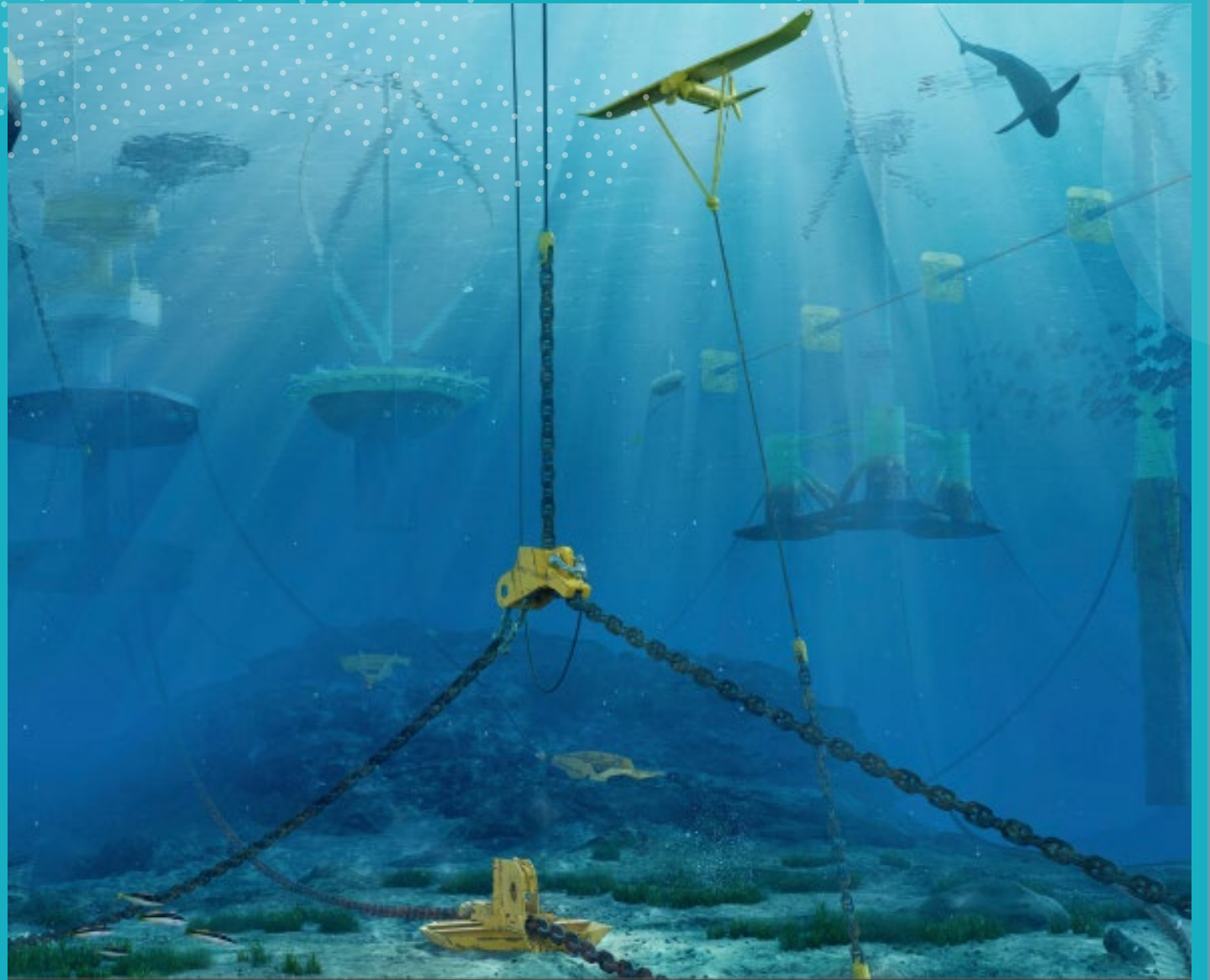
ES & Consent Application: Prepare report of EIA, submit ES, consenting authority determines application

ABOVE THE SPLASHLINE

- WHAT A FISHERMAN CAN SEE DOES NOT CAUSE A PROBLEM
- WHAT LIES BENEATH IS WHERE THE DANGER LIES



FOWF- BASICALLY
NO TAKE ZONES
FOR ALL TYPES
OF FISHING
METHODS

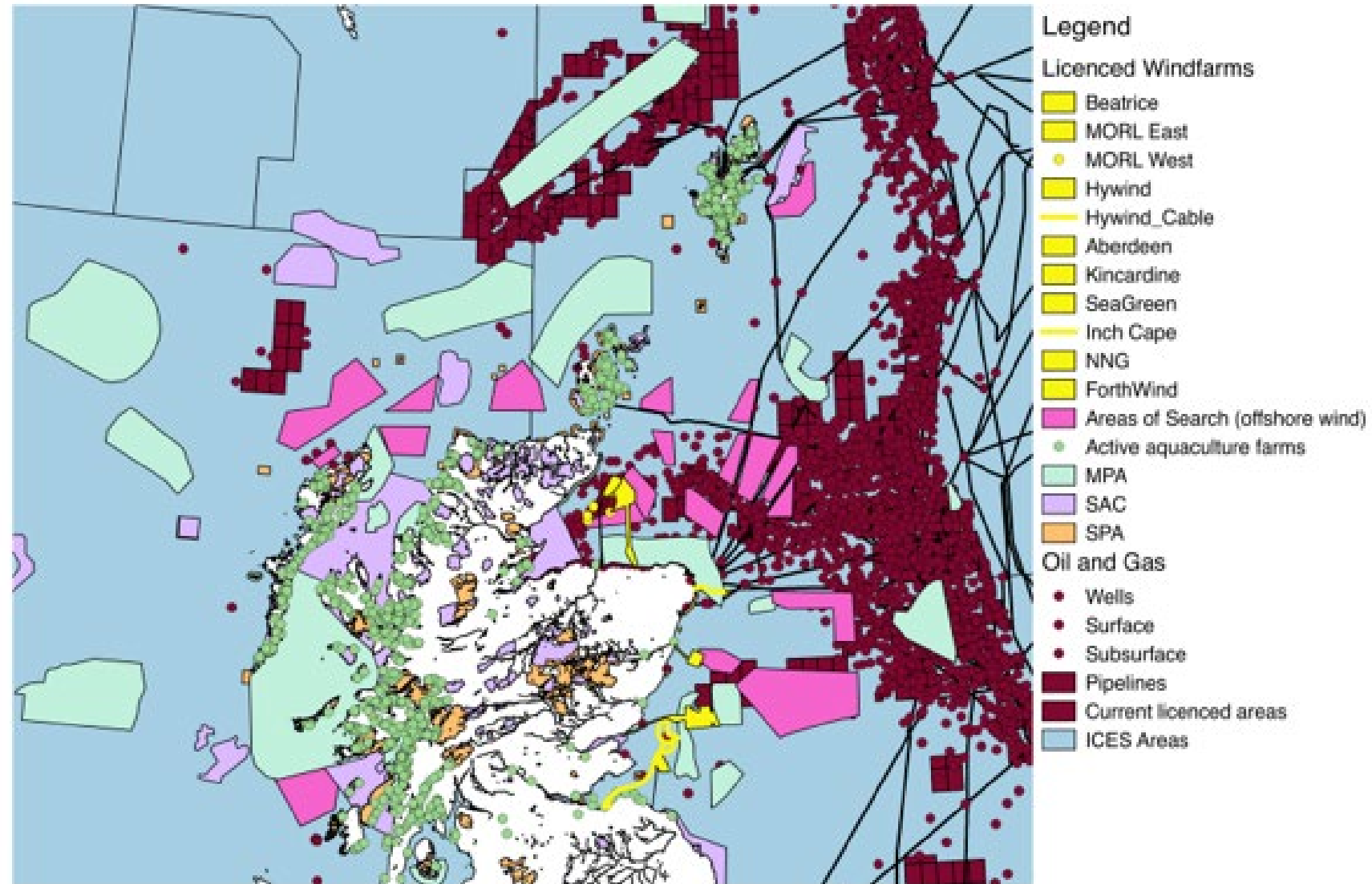


FISHING INDUSTRY
MUST SEE R&D FOR
MOORING SYSTEMS
THAT WOULD ENABLE
CO-EXISTANCE



ALL MAPS
LAYERED APART
FROM INTOG
AND HPMAs

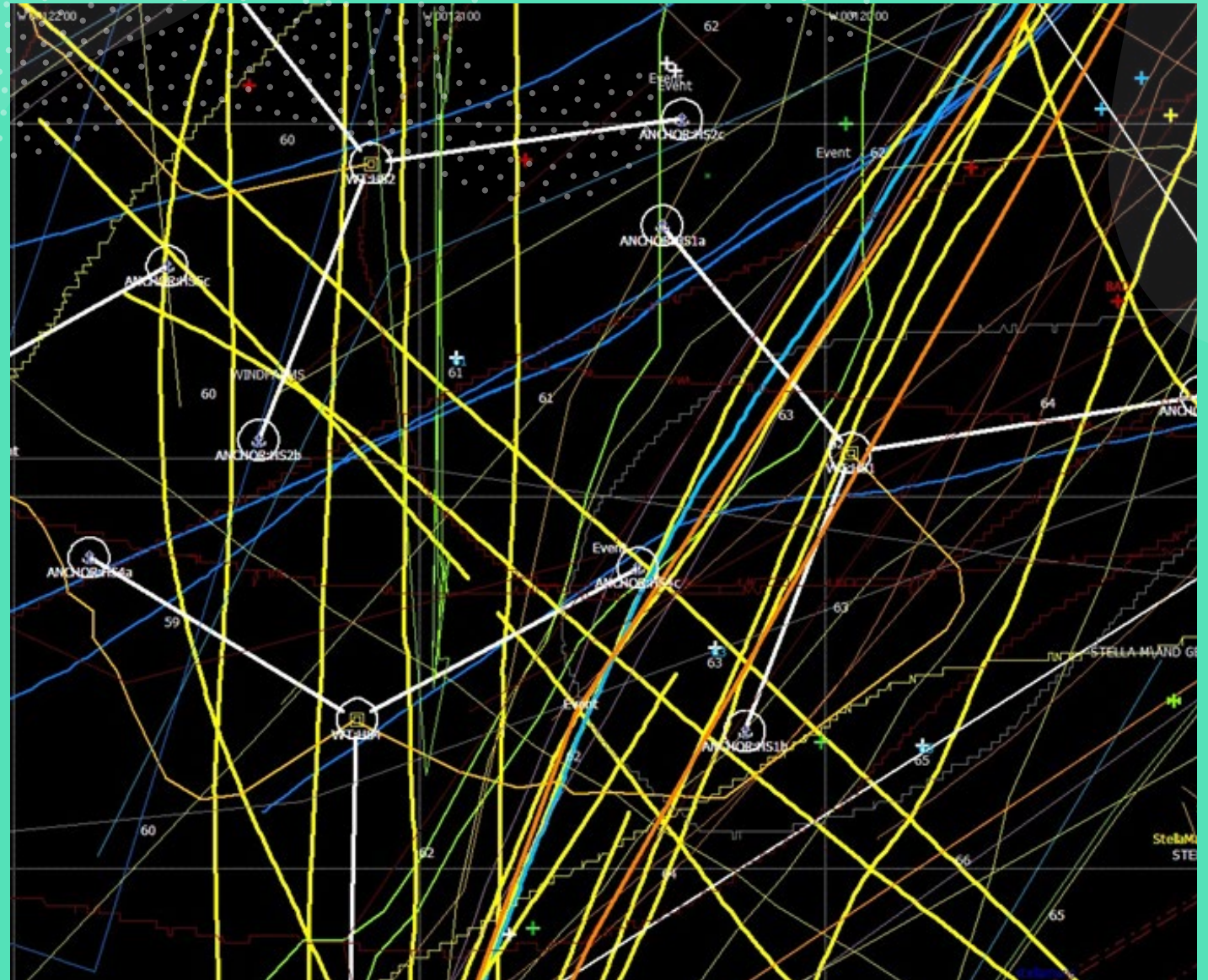
VESSEL
DISPLACEMENT
A HUGE
CONCERN FOR
THE CATCHING
SECTOR



HYWIND FLOATING
WINDFARM

FISHING AREA
BUCHAN DEEPS

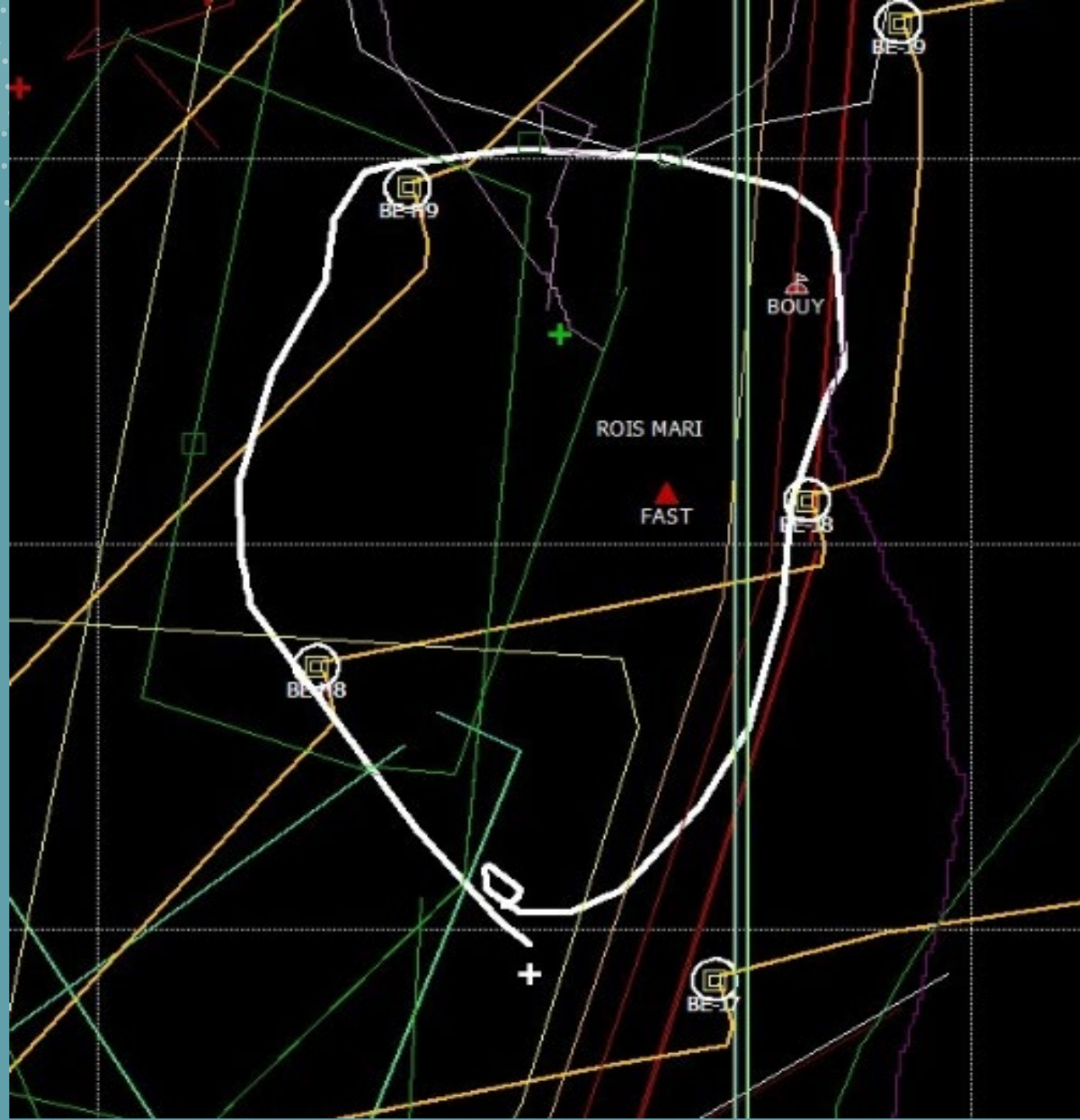
TRADITIONAL FISHING
METHODS CANNOT BE
DEPLOYED



Beatrice Offshore Windfarm
(Fixed Foundations)

Fishing Area The Smith Bank

Flyshooting now impossible within
the OWF



The background of the slide features a large, three-bladed wind turbine on a grassy hill under a clear blue sky. In the foreground, a thick yellow cable runs diagonally across the frame, with a section of its outer sheath removed to reveal a white, grid-like internal structure.

EXPORT CABLES = ADDITIONAL CHALLENGE

- ScotWind 25Gw lease Options
- 1Gw = circa 4 export cables
- 25Gw = 100 export cables
- 17 Plus Landfall sites
- Multiple Cable/Pipeline Crossings
- Cable Burial Methods
- Impacts on various fishing methods

Export Cable Routes

Early engagement prior to lease option

Local knowledge from fishermen keeps disruption to a minimum and could potentially save the developers time and money

Overtrawl verification a priority

More R&D into HVDC removes concerns of EMF

Summing Up:

The spatial squeeze is already happening – and is going to get much tighter

No one sector has any more 'right' to marine space than another

But we do need *fair and equitable* marine planning for co-existence

Too many unknowns, need science-based monitoring pre, during, post construction

Fishing produces low carbon, high protein healthy food – we are also part of the road map to net zero!

