



Scottish Government
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Sectoral Marine Plan for Offshore Wind Energy (encompassing Deep Water Plan Options)

Context Report

June 2018

marinescotland

Table of Contents

1	Introduction	1
2	Scotland’s Energy Demand and Energy Mix is Changing	1
3	Energy Targets	2
4	Projected Electricity Demand.....	3
5	Offshore Wind Development in Scotland.....	4
6	Updating the Sectoral Marine Plan for Offshore Wind.....	7
7	Consultation Information.....	12
8	Respondent Information Form	14

Figures

Figure 1. Existing and Planned Offshore Wind Development in Scottish Waters.....	5
Figure 2. Floating wind foundation typologies.....	9
Figure 3. Areas of Search for future Offshore Wind Development	10
Figure 4. Sectoral marine planning process.....	11

1 Introduction

- 1.1.1 The Scottish Government is committed to ensuring secure, reliable and affordable energy supplies within the context of long-term decarbonisation of energy generation. Continued growth of the renewable energy sector in Scotland is an essential feature of the future clean energy system and a potential key driver of economic growth.
- 1.1.2 Offshore wind is a large scale technology with the potential to play a pivotal role in Scotland's energy system over the coming decades. The development of technologies such as floating wind, which offer scope for development in deeper water, have significant potential to contribute offshore wind energy supply at affordable prices. The Draft Sectoral Plan for Offshore Wind published in 2013¹ focused on conventional offshore wind technologies. The Scottish Government is therefore seeking to develop an updated Sectoral Marine Plan for Offshore Wind Energy which encompasses deep water plan options to provide the strategic framework for future offshore wind deployment in Scottish waters.
- 1.1.3 The UK Government's Industrial Strategy rightly points to the achievements of the offshore wind industry, and the potential that it represents. The Scottish Government will continue to work with the UK Government to ensure that its approach under the proposed offshore wind Sector Deal takes Scotland's offshore wind potential and opportunity fully into account.

2 Scotland's Energy Demand and Energy Mix is Changing

- 2.1.1 The way we generate and use energy is changing rapidly and will continue to change over the coming decades. Key factors influencing change in Scotland include:
- The need to reduce greenhouse gas emissions from energy generation to tackle climate change;
 - The increasing demand for low carbon electricity for transport;
 - The continuing drive for energy efficiency to ensure that we use resources efficiently;
 - Ensuring security of energy supplies in an uncertain geopolitical context;
 - Tackling energy poverty and ensuring that energy is affordable;
 - An increasing focus on local energy systems, particularly to provide clean energy for Scotland, including island communities.
- 2.1.2 Scotland is committed to increasing the proportion of energy demand met by renewables as a key response to these drivers. As a nation with an abundance of renewable energy resources, the opportunity exists not only to meet domestic needs but also to export low carbon energy. The adoption of renewable energy technologies therefore also presents a significant economic opportunity for Scotland, including significant opportunity to lead on deep water offshore wind technologies.

¹ <http://www.gov.scot/Publications/2013/07/8702>

3 Energy Targets

- 3.1.1 To support the major changes that need to occur in energy generation, particularly to tackle climate change, Scotland is committed to a number of important energy targets both at national and EU level.
- 3.1.2 The Climate Change (Scotland) Act 2009 establishes a long-term framework to cut greenhouse gas emissions by at least 80% below 1990 levels by 2050, with an interim target of 42% by 2020. In addition, the Scottish Government has made a commitment to generating 30% of energy demand, incorporating the equivalent of 100% of gross electricity consumption, from renewable sources by 2020 with an interim target of 15% by 2015. These targets support the achievement of binding EU climate change targets², the EU Renewable Energy Directive³ and the achievement of the Low Carbon Economy Roadmap⁴ aspirations. In 2015, 59.4% of Scotland's electricity consumption came from renewable sources, exceeding the interim target and installed capacity continues to grow towards the 2020 target.⁵
- 3.1.3 The Scottish Government Energy Efficiency Action Plan 2010 set a target to reduce energy consumption from a 2005-2007 baseline by 12% by 2020. By 2014, final energy consumption was 15.2% lower than baseline, achieving the target earlier than envisaged.

The Scottish Energy Strategy and Climate Change Plan 2017

- 3.1.4 In December 2017 the Scottish Government adopted the Scottish Energy Strategy⁶ and updated the Climate Change Plan in February 2018⁷.

Scottish Energy Strategy

- 3.1.5 The Scottish Energy Strategy places a strong emphasis on the energy sector's economic role, benefits and potential, from established technologies to those that are new or still emerging. It sets out what more the Scottish Government is doing to help realise this potential under the following key areas:

- Stimulating Investment;
- Supporting Research and Innovation;
- Strengthening Supply Chains;
- Creating New Business Models;
- Developing Necessary Skills;
- Boosting Inclusive Growth;
- Cultivating Regional Partnerships; and
- Supporting Internationalisation.

² <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32009D0406>

³ <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32009L0028>

⁴ <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52011DC0112>

⁵ Provisional data show that in 2017 the estimated equivalent of 68.1% of gross electricity consumption came from renewable sources <https://www.gov.uk/government/statistics/energy-trends-section-6-renewables>.

⁶ <http://www.gov.scot/Resource/0052/00529523.pdf>

⁷ <http://www.gov.scot/Publications/2018/02/8867>

- 3.1.6 This Strategy sets two new targets for the Scottish energy system by 2030:
- The equivalent of 50% of the energy for Scotland's heat, transport and electricity consumption to be supplied from renewable sources; and
 - An increase by 30% in the productivity of energy use across the Scottish economy.
- 3.1.7 These targets demonstrate the Scottish Government's commitment to a low carbon future and to the continued growth of successful renewable energy sectors in Scotland.

Climate Change Plan

- 3.1.8 Under the Climate Change (Scotland) Act 2009, Scottish Ministers are required to set, by Order, annual emissions reduction targets for each year in the period 2010-2050, consistent with achieving the long-term greenhouse gas emission reduction targets. These annual targets are set in batches at least 12 years in advance. The third set batch of targets covering the period up to 2032 were established in October 2016⁸ and aim for a 66% reduction below 1990 levels by 2032.
- 3.1.9 In February 2018, Ministers published a report setting out policies and proposals for meeting those targets⁹. In particular this included a policy outcome to ensure that *'Scotland's electricity grid intensity is below 50g CO₂ per kilowatt hour, aided by enhanced flexibility mechanisms and powered by a high penetration of renewables, using a range of technologies including onshore wind, offshore wind, hydro, solar, marine and bioenergy'*. Based on achieving the emission reduction targets, Scotland can achieve decarbonisation of its electricity supply by 2030.
- 3.1.10 Other policy outcomes also seek to support the acceleration of uptake of electric cars and reduced reliance on fossil fuel for domestic heating.

4 Projected Electricity Demand

- 4.1.1 To meet the 2050 carbon reduction target, heating needs to move away from natural gas and use low carbon sources. This change will primarily need to occur through the electrification of heating. The growth in electric vehicles (EVs) will also have a significant impact on demand.
- 4.1.2 Based on scenario modelling undertaken by National Grid¹⁰, peak UK electricity demand is expected to rise from around 62 GW in 2016 to between 65-85 GW by 2050. This includes a forecast requirement for UK offshore wind capacity of between 8-18 GW by 2025 and 16-30 GW by 2050 (equivalent to around 50-100 TWh). Separately, the Energy Technologies Institute estimates that UK offshore wind deployment could reach 20-55 GW by 2050¹¹.

⁸ <http://www.legislation.gov.uk/ssi/2016/328/contents/made>

⁹ <http://www.gov.scot/Publications/2018/02/8867/10>

¹⁰ <http://fes.nationalgrid.com/>

¹¹ <http://www.eti.co.uk/insights/options-choices-actions-uk-scenarios-for-a-low-carbon-energy-system>

- 4.1.3 For Scotland, the National Grid scenarios suggest a total Scottish generating capacity of between 15 and 25 GW by 2035 (10-20 GW low carbon generation)¹². With demand in Scotland not expected to exceed 4.7 GW by 2035 (which is much less than the Scottish generation capacity), there is potential for export of power south, out of Scotland into England, for a significant amount of time.

5 Offshore Wind Development in Scotland

- 5.1.1 Scotland has an estimated 25% of Europe's offshore wind resources and therefore has significant potential for offshore wind development.
- 5.1.2 Exploiting offshore wind technology in an environmentally sustainable way will enable Scotland to lead the world in the transition to a low carbon economy over the next four decades and will help meet Scotland's wider objectives on climate change, generating substantial new economic activity, jobs and prosperity potential for Scotland.
- 5.1.3 The first commercial scale offshore wind farm in Scotland - Robin Rigg in the Solway Firth – came into operation in 2010, with an installed capacity of 174 MW.
- 5.1.4 In 2011 The Scottish Government published its plan for offshore wind development in Scottish Territorial Waters – Blue Seas Green Energy¹³. This plan included 6 short-term option sites and a number of medium-term areas of search for further consideration. Of the 6 short-term option sites, 3 have progressed to consenting: Beatrice in the Moray Firth, and two East coast sites - Inch Cape and Neart na Gaoithe. Beatrice is currently in construction and is due to become operational in 2019 with an installed capacity of 588 MW. Three of the sites – Argyll Array, Islay and Forth Array are no longer being progressed.
- 5.1.5 As part of the UK 3rd offshore wind farm leasing round, two Round 3 sites are being progressed in Scottish waters:
- Firth of Forth Offshore Wind Zone (SeaGreen Alpha and Bravo) off the coast of Fife - . it is intended that the zone will be developed in two phases with Phase 1 (1.05 GW) in the northern area of the Zone being developed first, followed by Phase 2 (1.4 GW) in the south-eastern area; and
 - Moray Firth Offshore Wind Zone – the zone is being developed in two main phases. Moray East (950 MW) obtained a contract for difference in September 2017 and the first part of zone is due to become operational in 2022/2023. Moray West (750 MW) is in the early stages of planning.
- 5.1.6 In 2013, a Draft Sectoral Plan¹⁴ for progressing ten medium-term option areas was published for consultation. The Plan remains to be finalised. This is the result of market uncertainty created by Electricity Market Reform. In December 2014, Scottish Ministers decided not to progress two of the option

¹² <https://www.nationalgrid.com/uk/publications/electricity-ten-year-statement-etys>

¹³ <http://www.gov.scot/Topics/marine/marineenergy/wind>

¹⁴ <http://www.gov.scot/Publications/2013/07/8702>

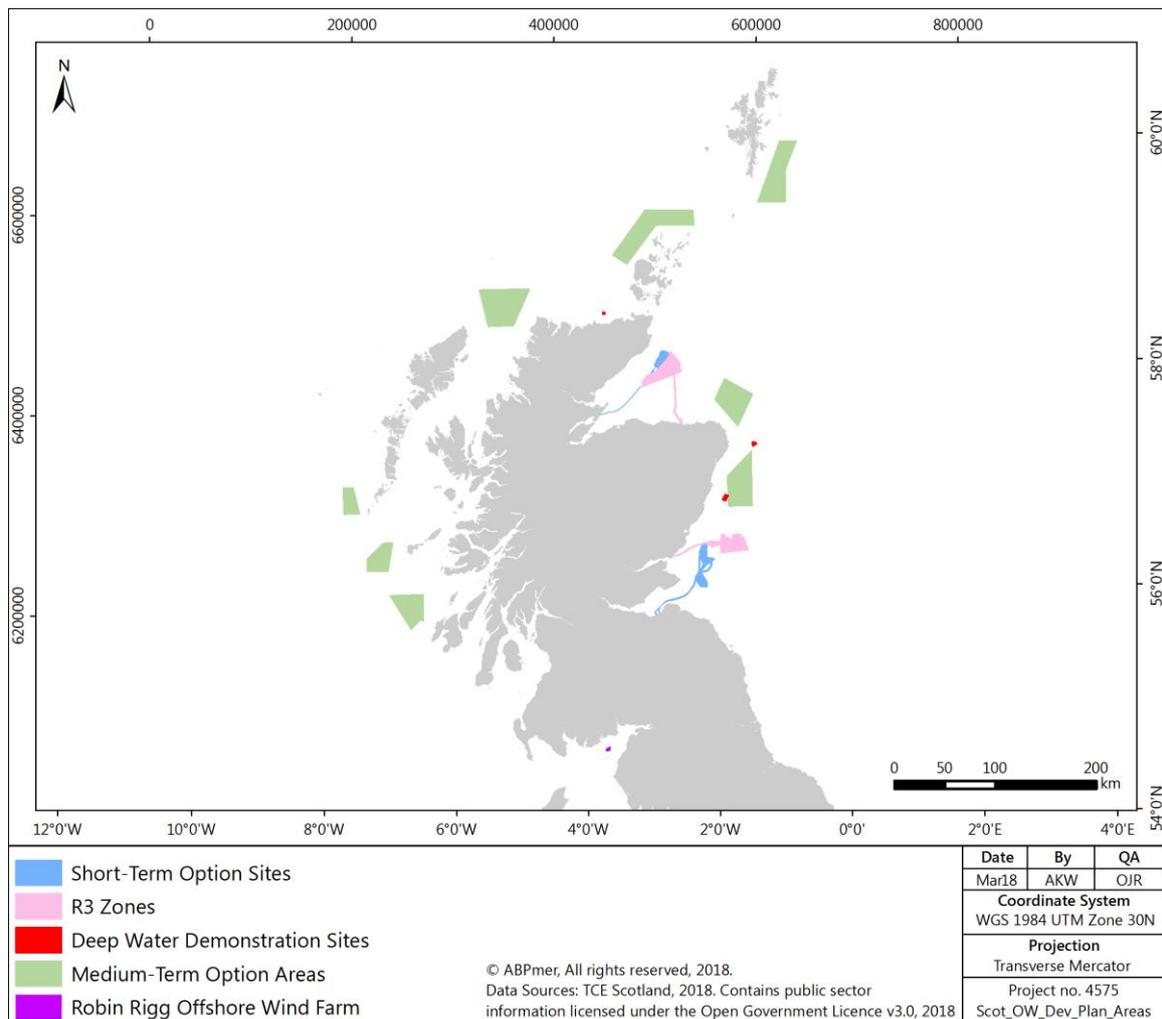
areas located in South West Scotland and these were removed from the draft Plan.

5.1.7 In the last two years, Scottish Ministers' have given consent to a number of demonstration scale (<100 MW) projects in Scottish Waters, with the potential to demonstrate an array of innovative and new substructure technologies. It is the intention that these projects will be constructed and commence operations over the coming few years. These include the following floating offshore wind demonstration projects:

- 30 MW Hywind Scotland Pilot Park off Peterhead which started generating power in October 2017;
- 50 MW Kincardine Offshore Wind Farm off Aberdeen which was granted consent in March 2017; and
- 12 MW Dounreay Tri-floating Wind Demonstration Project off Dounreay which was granted consent in March 2017.

5.1.8 As at May 2018, Scotland had 217 MW of installed offshore wind capacity, but with a further 4.2 GW in construction or consented and awaiting construction¹⁵. A map of existing and planned projects is provided in Figure 1.

Figure 1. Existing and Planned Offshore Wind Development in Scottish Waters



¹⁵ <http://www.gov.scot/Topics/Statistics/Browse/Business/Energy/planningdata>

- 5.1.9 The pace of future offshore wind development will, to a considerable extent, be governed by the availability of Contracts for Difference (CfD), the subsidy regime introduced by Electricity Market Reform (EMR), unless levelised cost of electricity LCOE initiatives result in offshore wind development project bids becoming subsidy free. The future availability of CfD will also depend on the offshore wind industry achieving planned cost reductions. Recent progress with cost reduction is encouraging with very significant reductions in the strike price achieved for offshore wind farm projects in the second round of CfD allocations announced in September 2017¹⁶. As the CfD regime is UK-wide, Scottish offshore wind farm projects have to bid competitively with other UK offshore wind farm projects.
- 5.1.10 The Scottish Government believes that Scotland's people should benefit from offshore renewable energy projects. Scotland, and its local communities, should receive a direct and lasting legacy from the exploitation of its natural resources. Proposals to maximise community benefit from renewables were published in a consultation paper "Securing the Benefits of Scotland's Next Energy Revolution" in November 2010¹⁷. These included actions designed to empower communities and ensure that the public sector leads by example in delivering real and lasting benefits. The CfD regime also requires developers to prepare a local content plan.
- 5.1.11 In conjunction with Scottish Enterprise and Highlands and Islands Enterprise, The Scottish Government is taking forward a number of initiatives to support development of the Scottish offshore wind industry and supply chains. In particular, the National Renewables Infrastructure Plan (NRIP) identifies potential investment locations to support the development of the offshore renewables sector¹⁸. A number of ports are already supporting the construction of Beatrice Offshore Wind Farm including Wick, Nigg, Cromarty Firth and Buckie. Peterhead and Aberdeen have also provided important construction support for the European Offshore Wind Deployment Centre. Ports such as Montrose and Dundee have made major investments to support offshore wind construction and operations and maintenance (O&M) activity on the East Coast.
- 5.1.12 Argyll and Bute Council worked in partnership with the Scottish Government, Marine Scotland, Highlands and Islands Enterprise and The Crown Estate to examine and better understand the potential onshore implications associated with the proposed Argyll Array off Tiree¹⁹. Community and stakeholder engagement was central to the process. The project sought to map the onshore implications arising from four operation and maintenance scenarios identified by the developer relating to the associated construction, operational and maintenance requirements of the offshore wind farm development, looking to optimise the socio-economic benefit to the island and mitigate the negative consequences of each scenario.

¹⁶ <https://www.gov.uk/government/publications/contracts-for-difference-cfd-second-allocation-round-results>

¹⁷ <http://www.gov.scot/Publications/2010/11/26094907/10>

¹⁸ <http://www.hie.co.uk/growth-sectors/energy/n-rip.html>

¹⁹ <https://www.argyll-bute.gov.uk/planning-and-environment/tiree-shore-scenario-mapping>

- 5.1.13 Implementing and sustaining local content is critical for Scotland to realise the benefits of offshore wind. A supply chain mapping exercise for the North East and East coasts of Scotland identified significant potential for developing local supply chains, both to support manufacturing and O&M²⁰. Particular manufacturing opportunities have been identified around blade manufacture and substation construction. A number of North East and East coast ports are well placed to provide O&M support. However, for supply chains to invest in building capacity, there needs to be sufficient confidence in the market opportunities. Scotland has existing engineering, project management and marine engineering expertise which has and is well placed to provide services to developers design and install projects, we are therefore well placed to secure high quality jobs required by the offshore wind sector.
- 5.1.14 Significant offshore wind development will also require development of the national electricity grid. In particular, expansion of Scottish offshore wind capacity will require improved connectivity both within Scotland and between Scotland and England to facilitate the export of electricity²¹. A number of projects to provide improved connectivity are currently being taken forward. The 2.2 GW Western HVDC connection links Hunterston and The Wirral and is expected to be commissioned in 2018. The 1.2 GW Caithness Moray link is also expected to become operational in 2018. Work is ongoing to gain approval for and construct the 450 MW Western Isles link which will run between Beaulieu and the Isle of Lewis. The development of improved grid connectivity also provides an opportunity for islands to develop clean energy projects. Interconnectors for both Orkney²² and Shetland²³ are both registered at an early development phase by Scottish and Southern Electricity Networks.

6 Updating the Sectoral Marine Plan for Offshore Wind

- 6.1.1 The UK is the current market leader in offshore wind power, with around 5.8 GW of installed capacity by the end of 2017, all of which consists of conventional fixed-bottom foundation technology located in relatively shallow water depths (<40 m) and near to shore (<30 km). As installed capacity increases and the opportunities in shallow near-shore sites is exhausted, projects will need to be developed further from shore and in deeper water, which will pose greater technical challenges and potentially constrain efforts to reduce costs.
- 6.1.2 In response to this challenge the industry is considering the potential for deep water offshore wind foundation technology to unlock deep water sites at a competitive cost of energy. Scotland has natural advantages in terms of a combination of high wind speeds and abundant deep water sites.

²⁰ ch2m (2016). Scenario Mapping: The economic benefits of offshore wind energy in the East and North East regions of Scotland. Report to Marine Scotland, East Coast Renewables and The Crown Estate, April 2016.

²¹ <https://www.nationalgrid.com/uk/publications/electricity-ten-year-statement-etys>

²² <https://www.ssen-transmission.co.uk/projects/orkney/>

²³ <https://www.ssen-transmission.co.uk/projects/shetland/>

- 6.1.3 The potential availability of deep water sites may also assist in addressing potential constraints associated with visual intrusion, commercial fishing and shipping. Deep water sites may also offer fewer potential interactions and impacts associated with seabirds, fish spawning and nursery grounds. Conventional offshore wind technologies rely on fixed foundations and are limited to water depths of less than 40 m. Given the need to avoid unacceptable visual impact this has often led to the siting of offshore wind farms on offshore sandbanks which are also of particular importance to seabirds and marine mammals. By avoiding such areas, deep water wind has the potential to significantly reduce interactions with seabirds and marine mammals.
- 6.1.4 In addition, some deep water wind technologies avoid the need for noisy installation activity such as percussive piling, which may cause disturbance to marine mammals and fish. Deep water wind technologies may therefore be more environmentally acceptable, particularly when located near to areas of functional importance to marine mammals or fish.
- 6.1.5 The siting of offshore wind technologies further offshore into deeper waters may offer the potential to reduce impacts and disruption of commercial fishing activity, particularly the smaller vessel inshore fishing fleet operating within 12 nautical miles. The development of deep water wind also provides an opportunity to further develop offshore wind supply chains and to lever existing infrastructure and supply chain capabilities from the offshore oil and gas industry and creating the requisite conditions to position Scotland as a world leader in deep water wind technologies
- 6.1.6 There now exists the opportunity for Scottish Ministers' to review the Draft Sectoral Plan for Offshore Wind Energy and undertake a strategic planning process to ensure the spatial strategy is in place to enable the successful development of this sector, to include deep water wind technologies with commercial scale developments potentially coming on line from the mid-2020s onwards.
- 6.1.7 A range of different technologies have been proposed for floating/deep water offshore wind²⁴ (Figure 2):
- Semi-submersible platform: Buoyancy stabilised platform which floats semi-submerged on the surface of the ocean whilst anchored to the seabed with catenary mooring lines
 - Spar-buoy: a cylindrical ballast-stabilised structure which gains its stability from having the centre of gravity lower in the water than the centre of buoyancy
 - Tension leg platform: a semi-submerged buoyant structure, anchored to the seabed with tensioned mooring lines, which provide stability.
- 6.1.8 These technologies all have different strengths and weaknesses and may be appropriate in different conditions. Over time, further technologies may become available for deployment in deep water.
- 6.1.9 The Sectoral Plan for Offshore Wind Energy will include areas for both conventional and deep water wind technologies. However, the Plan will be technology neutral with technology preferences determined by the market.

²⁴ <https://www.carbontrust.com/media/670664/floating-offshore-wind-market-technology-review.pdf>

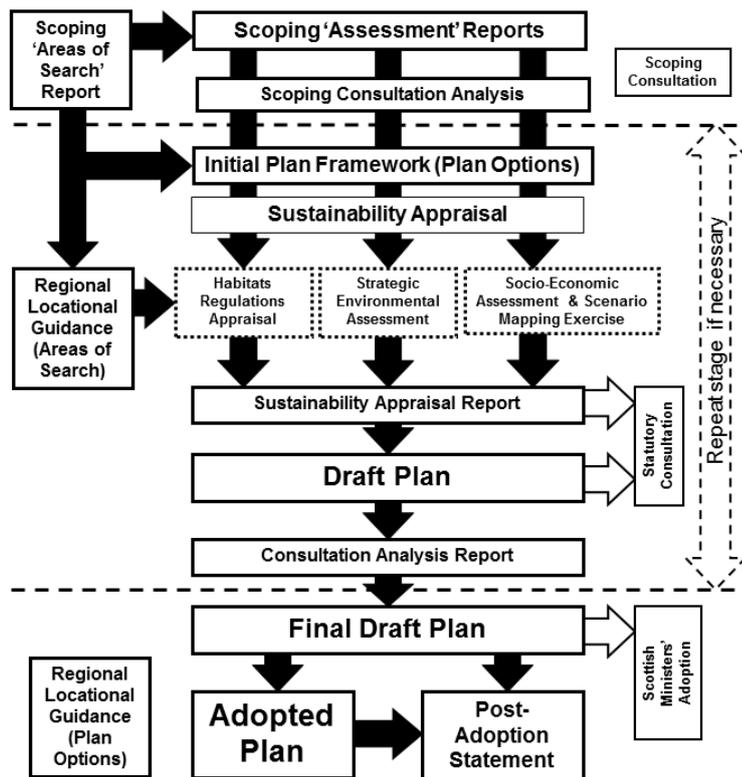
Figure 2. Floating wind foundation typologies²⁵



- 6.1.10 In Scotland, there are extensive deep water locations to the east, north, and west of the country, with more than a 100 GW offshore wind potential located in water depths exceeding 60 m. However there are other sector interests in Scottish waters that will need to be considered as well as environmental ecosystem processes that need to be taken into account when planning sectoral development.
- 6.1.11 The Sectoral Plan for Offshore Wind Energy will include areas for both conventional and deep water wind technologies. However, the Plan will be technology neutral with technology preferences determined by the market. An initial plan of several GW would help to maintain and develop grid strategy, supply chains and create a climate for potential further exploitation of deep water wind resources in the longer-term.
- 6.1.12 Marine Scotland has undertaken work to define a number of Areas of Search (AoS) (Figure 3). These AoS will be refined through the development of Regional Locational Guidance (RLG) to identify Draft Plan Option Areas (DPOs).
- 6.1.13 The development of the Sectoral Plan for Offshore Wind Energy will follow the Scottish Government's sectoral marine planning process (see Figure 4). This will include Strategic Environmental Assessment, Socio-economic Impact Assessment (including Scenario Mapping as required by the Scottish National Marine Plan) and Habitats Regulations Appraisal as part of an overall Sustainability Appraisal together with extensive informal and

²⁵ <https://www.dnvgl.com/technology-innovation/broader-view/electrifying-the-future/third-generation-wind-power.html>

Figure 4. Sectoral marine planning process²⁷



²⁷ <http://www.gov.scot/Publications/2013/07/8702>

7 Consultation Information

7.1.1 Responding to this consultation

7.1.2 We are inviting responses to this consultation by **18 July 2018**

7.1.3 Please respond to this consultation using the Scottish Government's consultation platform, Citizen Space. You view and respond to this consultation online at <https://consult.gov.scot/marine-scotland/offshore-wind-scoping>. You can save and return to your responses while the consultation is still open. Please ensure that consultation responses are submitted before the closing date of **18 July 2018**

7.1.4 If you are unable to respond online, please complete the Respondent Information Form (see "Handling your Response" below) to:
SectoralMarinePlanning@gov.scot

7.1.5 Or by post to:

Offshore Wind Sectoral Marine Plan Scoping Consultation
Marine Scotland Planning and Policy (1A South)
Scottish Government, Victoria Quay
Edinburgh
EH6 6QQ

7.1.6 Handling your response

7.1.7 If you respond using Citizen Space (<http://consult.scotland.gov.uk/>), you will be directed to the Respondent Information Form. Please indicate how you wish your response to be handled and, in particular, whether you are happy for your response to be published.

7.1.8 If you are unable to respond via Citizen Space, please complete and return the Respondent Information Form attached included in this document. If you ask for your response not to be published, we will regard it as confidential, and we will treat it accordingly.

7.1.9 All respondents should be aware that the Scottish Government is subject to the provisions of the Freedom of Information (Scotland) Act 2002 and would therefore have to consider any request made to it under the Act for information relating to responses made to this consultation exercise.

7.1.10 Next steps in the process

7.1.11 Where respondents have given permission for their response to be made public, and after we have checked that they contain no potentially defamatory material, responses will be made available to the public at <http://consult.scotland.gov.uk>. If you use Citizen Space to respond, you will receive a copy of your response via email.

7.1.12 Following the closing date, all responses will be analysed and considered along with any other available evidence to help us. Responses will be published where we have been given permission to do so.

7.1.13 Comments and complaints

7.1.14 If you have any comments about how this consultation exercise has been conducted, please send them to SectoralMarinePlanning@gov.scot

7.1.15 Scottish Government consultation process

7.1.16 Consultation is an essential part of the policy-making process. It gives us the opportunity to consider your opinion and expertise on a proposed area of work.

7.1.17 You can find all our consultations online: <http://consult.scotland.gov.uk>. Each consultation details the issues under consideration, as well as a way for you to give us your views, either online, by email or by post.

7.1.18 Consultations may involve seeking views in a number of different ways, such as public meetings, focus groups, or other online methods such as Dialogue (<https://www.ideas.gov.scot>)

7.1.19 Responses will be analysed and used as part of the decision making process, along with a range of other available information and evidence. We will publish a report of this analysis for every consultation. Depending on the nature of the consultation exercise the responses received may:

- indicate the need for policy development or review
- inform the development of a particular policy
- help decisions to be made between alternative policy proposals
- be used to finalise legislation before it is implemented

7.1.20 While details of particular circumstances described in a response to a consultation exercise may usefully inform the policy process, consultation exercises cannot address individual concerns and comments, which should be directed to the relevant public body.



8 Respondent Information Form

Sectoral Marine Plan for Offshore Wind Energy (encompassing Deep Water Plan Options) - Context Report

Please Note this form **must** be completed and returned with your response.
Are you responding as an individual or an organisation?

Individual

Organisation
Full name or organisation's name

Phone number
Address

Postcode

Email

The Scottish Government would like your permission to publish your consultation response. Please indicate your publishing preference:

- Publish response with name
- Publish response only (without name)
- Do not publish response

Information for organisations:

The option 'Publish response only (without name)' is available for individual respondents only. If this option is selected, the organisation name will still be published.

If you choose the option 'Do not publish response', your organisation name may still be listed as having responded to the consultation in, for example, the analysis report.

We will share your response internally with other Scottish Government policy teams who may be addressing the issues you discuss. They may wish to contact you again in the future, but we require your permission to do so. Are you content for Scottish Government to contact you again in relation to this consultation exercise?

Yes

No

Consultation Question

Please provide any comments you have in relation to the Sectoral Marine Plan for Offshore Wind Energy (encompassing Deep Water Plan Options) - Context Report.



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