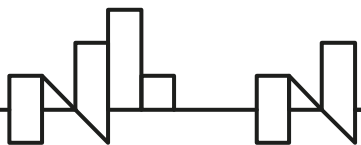


Secondary steel in offshore wind farms

Secondary steel market in Poland

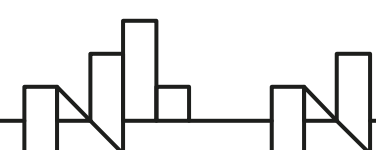
Secondary steel market in Poland

	Capacity	Turbine	No. Turbine	SS per monopile [tons]	SS per Phase
Phase 1	5 900	15MW	393	75	29 500
Phase 2	5 100	15MW	340	75	25 500
Total for 11 GW			733		55 000



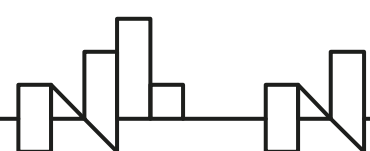
Presences on the market from 2002

Firma	Nazwa Farmy Wiatrowej	Rok	Masa T
EPG	Rodsand wind farm	2002	350
Mostostal Pomorze	Anholt	2011	1000
Mostostal Pomorze	Northwind	2012	500
Stocznia Gdańsk SA/Mostostal Chojnice	Borkum Riffgrund	2012	850
Mostostal Pomorze	Sandbank Offshore Substation	2015	900
Mostostal Pomorze	Blight Bank Phase II Project	2016	450
Crist/GSG Towers	Hornsea	2017	
EPG	Walney Offshore Wind Farm	2017	1300
Mostostal Pomorze	Northwester 2 Offshore Wind Farm	2018	400
Mostostal Pomorze	Arcadis Ost	2021	1000
EPG	Kaskasi	2021	700



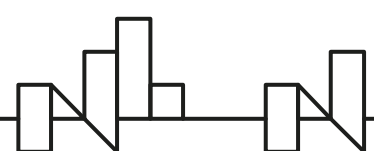
Presence of Global Players

Heerema Opole



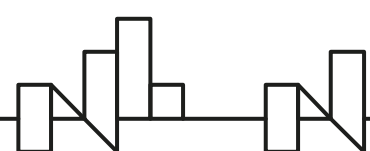
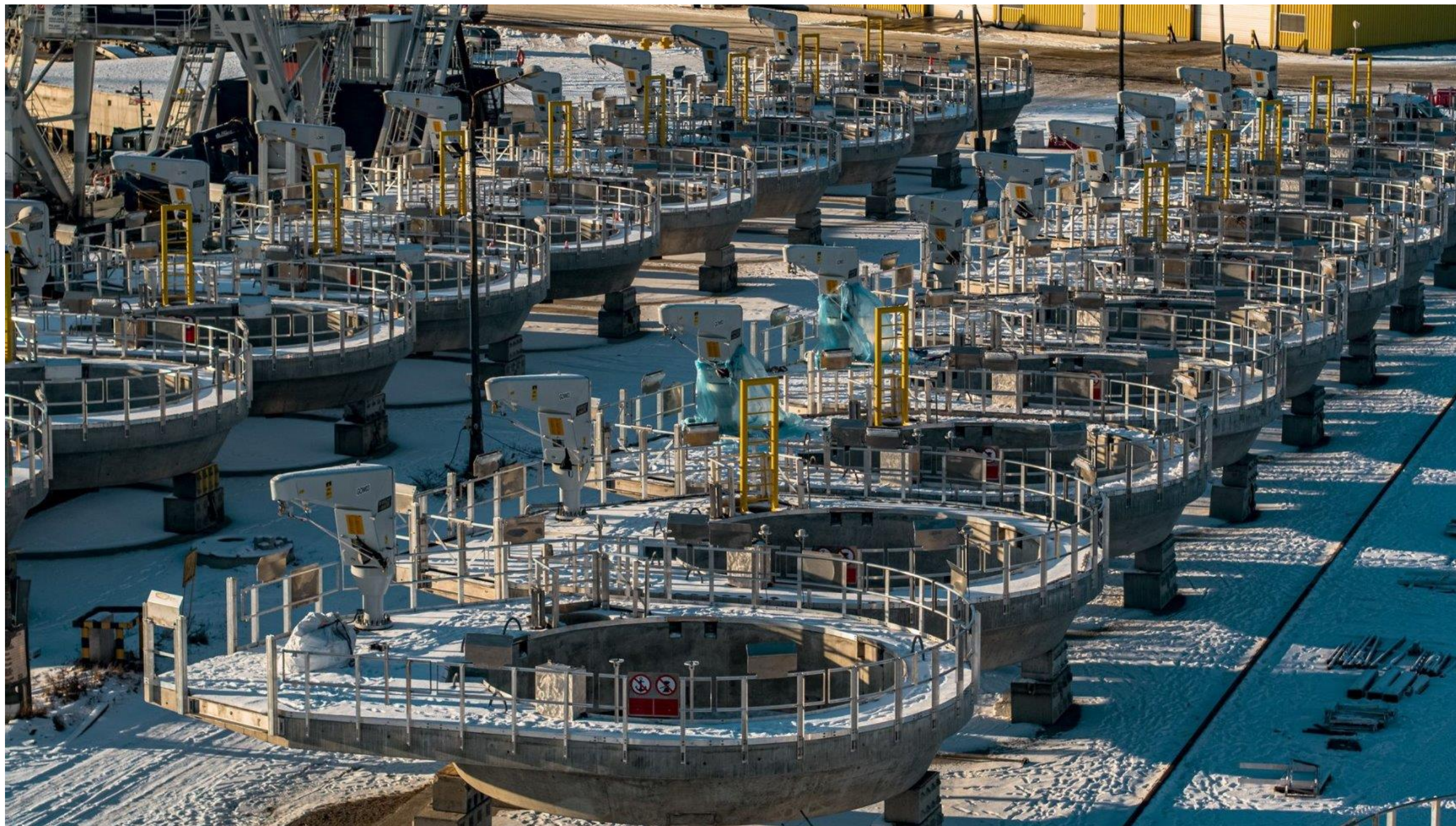
Presence of Global Players (1)

Smulders Projects



Presence of Global Players (2)

Aarsleff



Example of components produced in Poland

JVP STEEL

JW STEEL
CONSTRUCTION 

alumare
sp. z o.o.

GOTECH

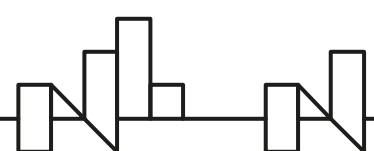
 **NAVIKON**

TARKON 

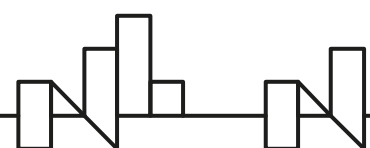
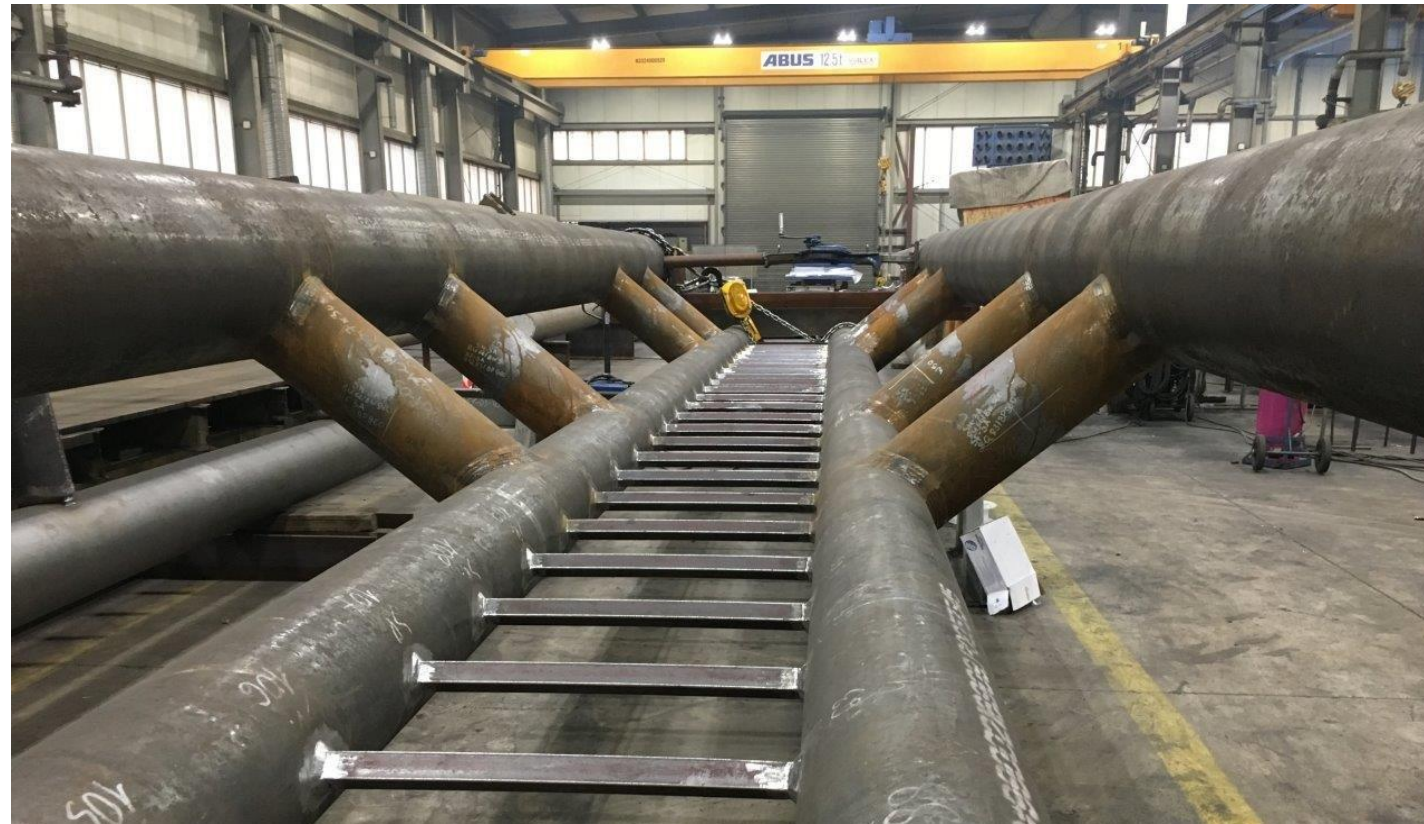
IRKO

 **FERRUM S.A.**

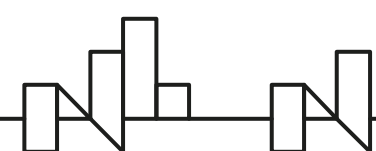
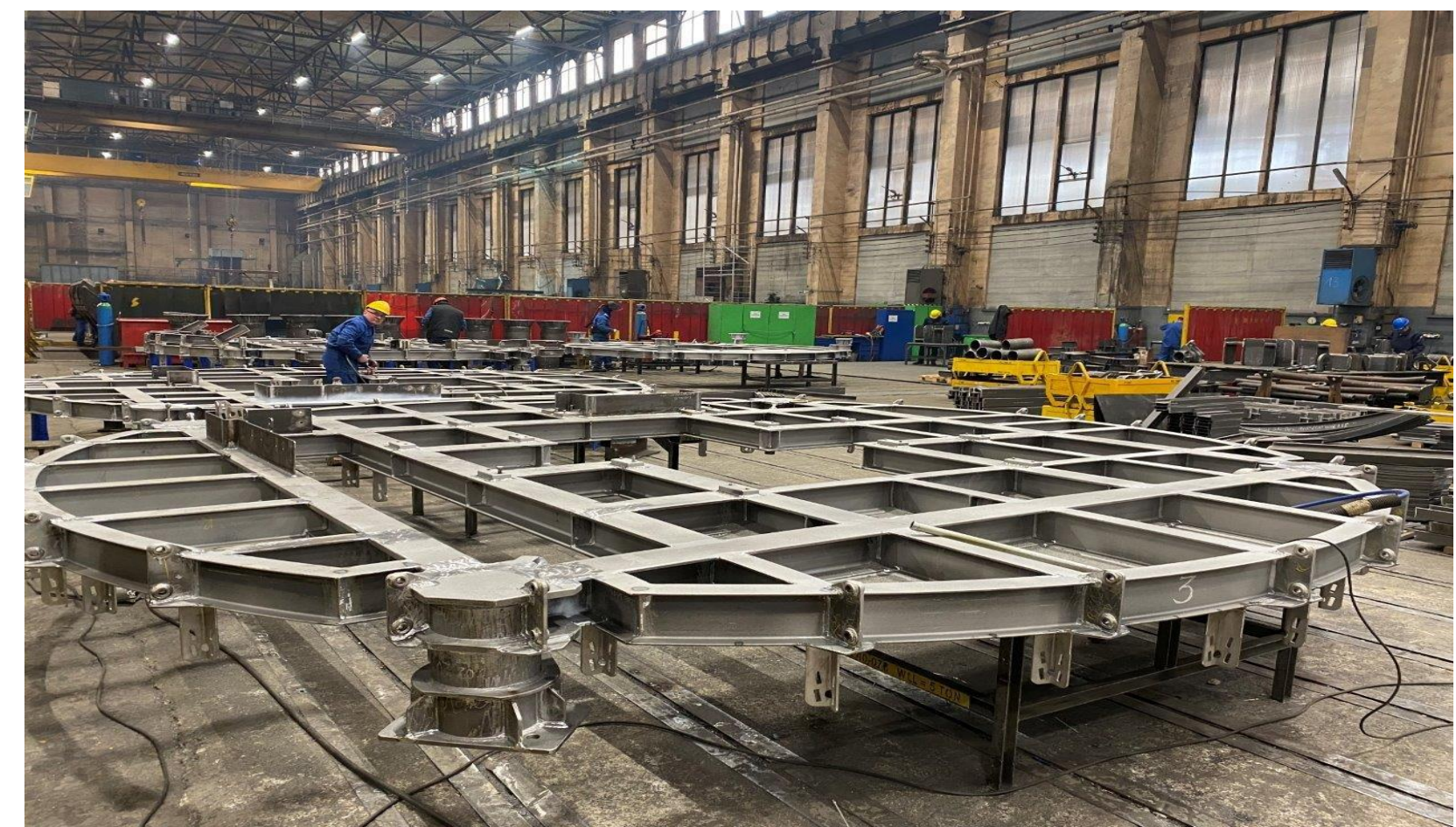
PROMOSTAL
steel constructions & cryogenic tanks



Example of components produced in Poland (1)



Example of components produced in Poland (2)

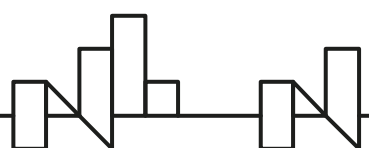


Example of components produced in Poland (3)

Navikon

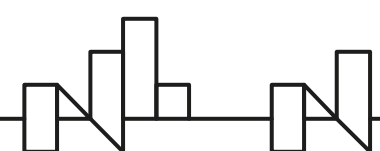


 **NAVIKON**



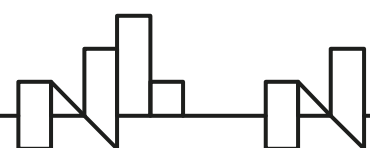
Fabrication of secondary steel in Poland

Post area of Gdańsk/Gdynia Shipyard



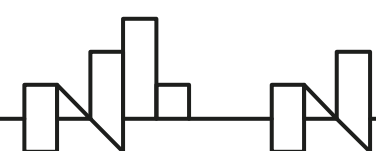
Fabrication for Norway market

Crist Offshore



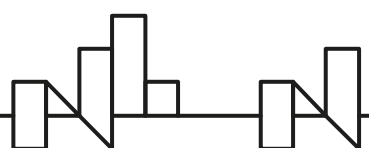
Fabrication of secondary steel in Poland (1)

Post area of Szczecin Shipyard

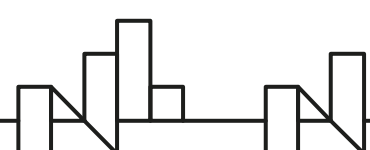
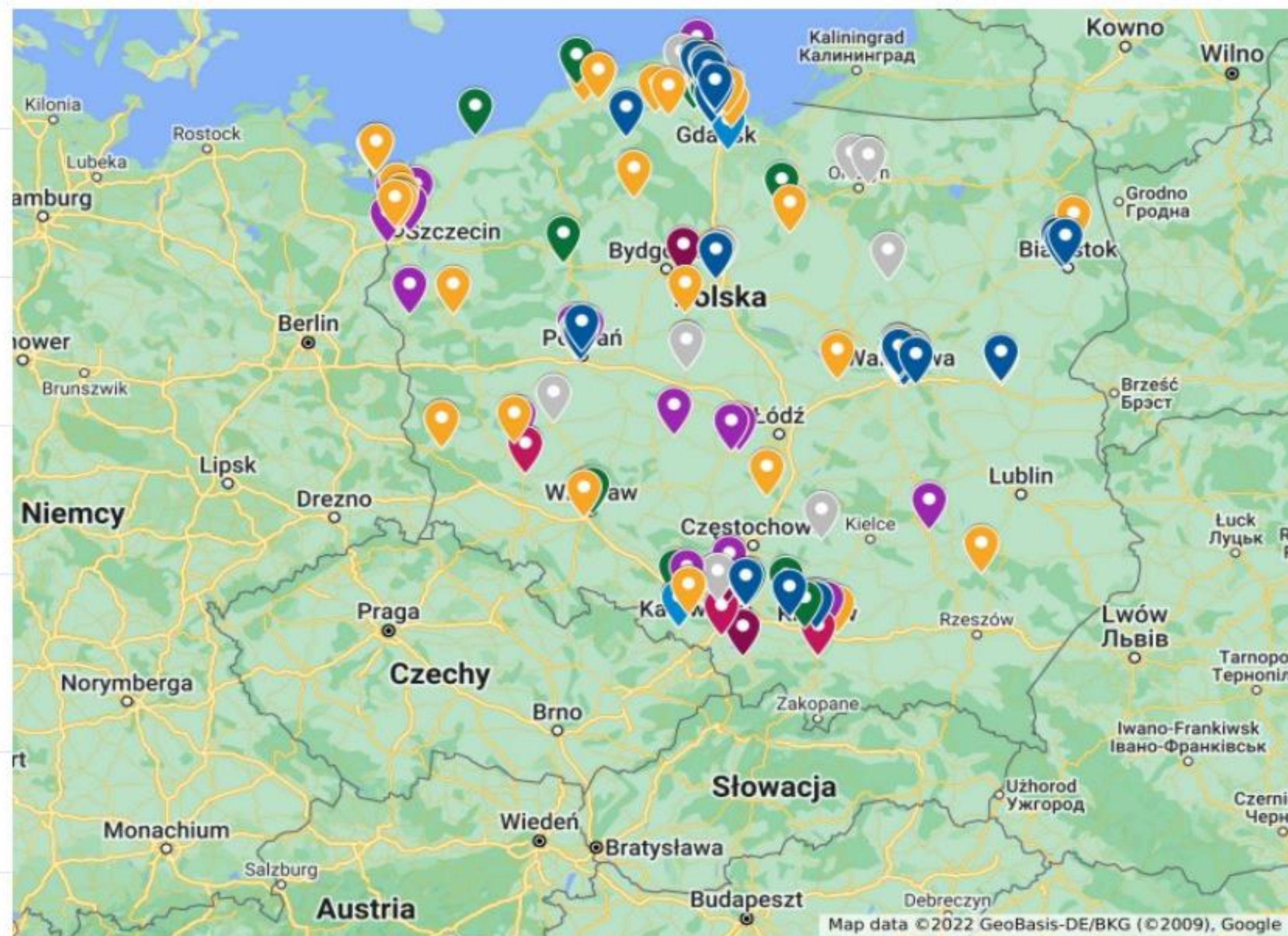


Main Characteristics

- Capacity per mid size company ~ 12k manhours per month
- Capacity in Gdańsk/ Gdynia post industrial areas (CRIST, GBP) >100k manhours per month
- High quality and strong HSE Focus
- Access to skilled workers
- Experience and know-how
- Strong supply chain for shipbuilding and oil&gas market
- Appetite for FC or EPC scope?



Fabrication of secondary steel in Poland (2)



Thank you!

