

OFFSHORE WIND

CLUSTER BUILDER LAUNCH EVENT

Ian McDonald
Specialist, Offshore Wind
Scottish Enterprise
15th of June, 2pm

#SCOTLAND|SNOW

AGENDA

Introductions & Welcome

- Ian McDonald – Specialist (Offshore Wind), Scottish Enterprise

Barriers & Opportunities to Supply Chain Growth

- David Stevenson – Head of Offshore Wind Policy & Supply Chain, Scottish Government

Scotland's Offshore Wind Clusters

- Paul O'Brien – Cluster Manager, DeepWind
- David Webster – Chair, Forth & Tay Offshore

Introduction to the Cluster Builder and the Supply Chain Survey

- Lara Jurgens – Market Analyst, Xodus Group
- Elson Martins – Senior Renewables Consultant, Xodus Group

Discussion and Q&A

- Above listed presenters
- Shona Clive – Cluster Manager, Forth & Tay Offshore
- Scott Hamilton – Renewables Division Manager, Xodus Group



EUROPE & SCOTLAND

European Regional Development Fund
Investing in a Smart, Sustainable and Inclusive Future





Barriers and opportunities to supply chain growth

David Stevenson
Head of Offshore Wind Policy & Supply Chain

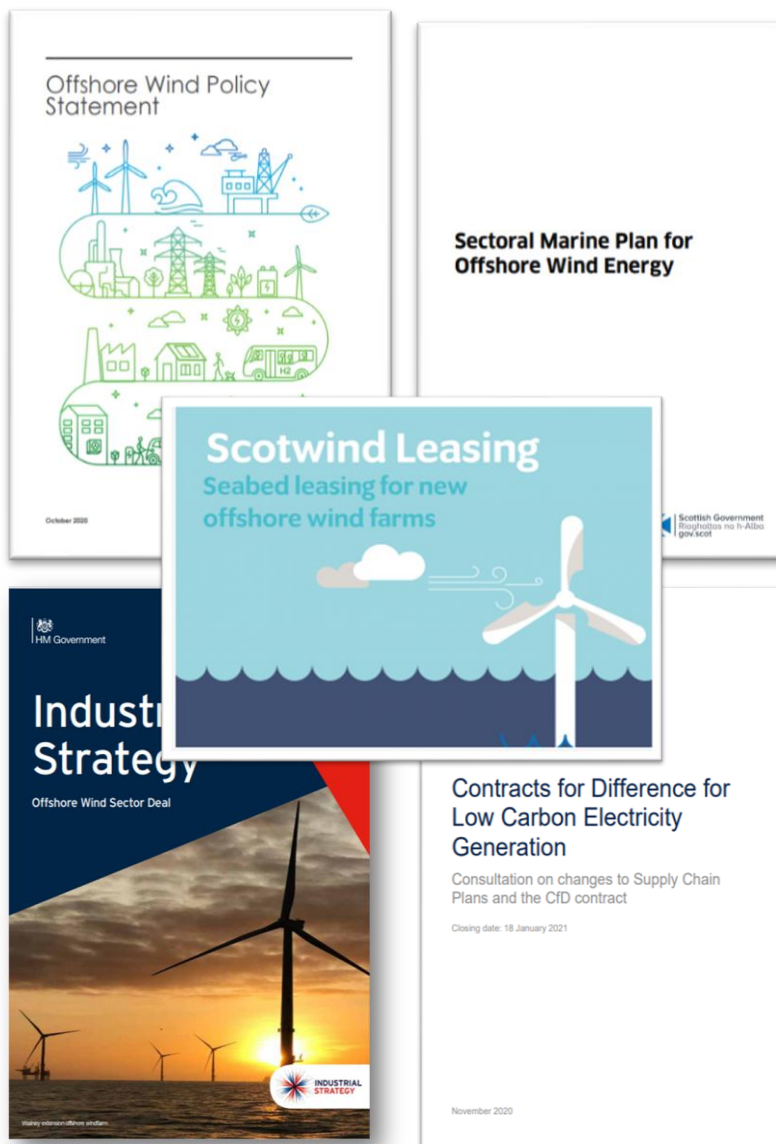
david.stevenson@gov.scot



Scottish Government
Riaghaltas na h-Alba
gov.scot



Offshore Wind & Supply Chain



- Target of 8GW-11GW by 2030
- Create up to 6000 jobs
- 15 sites with potential for up to 10GW
- Introduction of SCDS to increase local content
- Increase of local content to 60% by 2030
- Focus to attract inward investment
- Proposed fundamental changes to CfD Supply Chain Plans



CLUSTER INTRODUCTIONS

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DeepWind Cluster: Update

June 2021

Cluster
Builder
Webinar



DeepWind
North of Scotland Offshore Wind Cluster

Pacific Orca at Beatrice Project, source – HIE

Steering Group & Membership

Members = 595



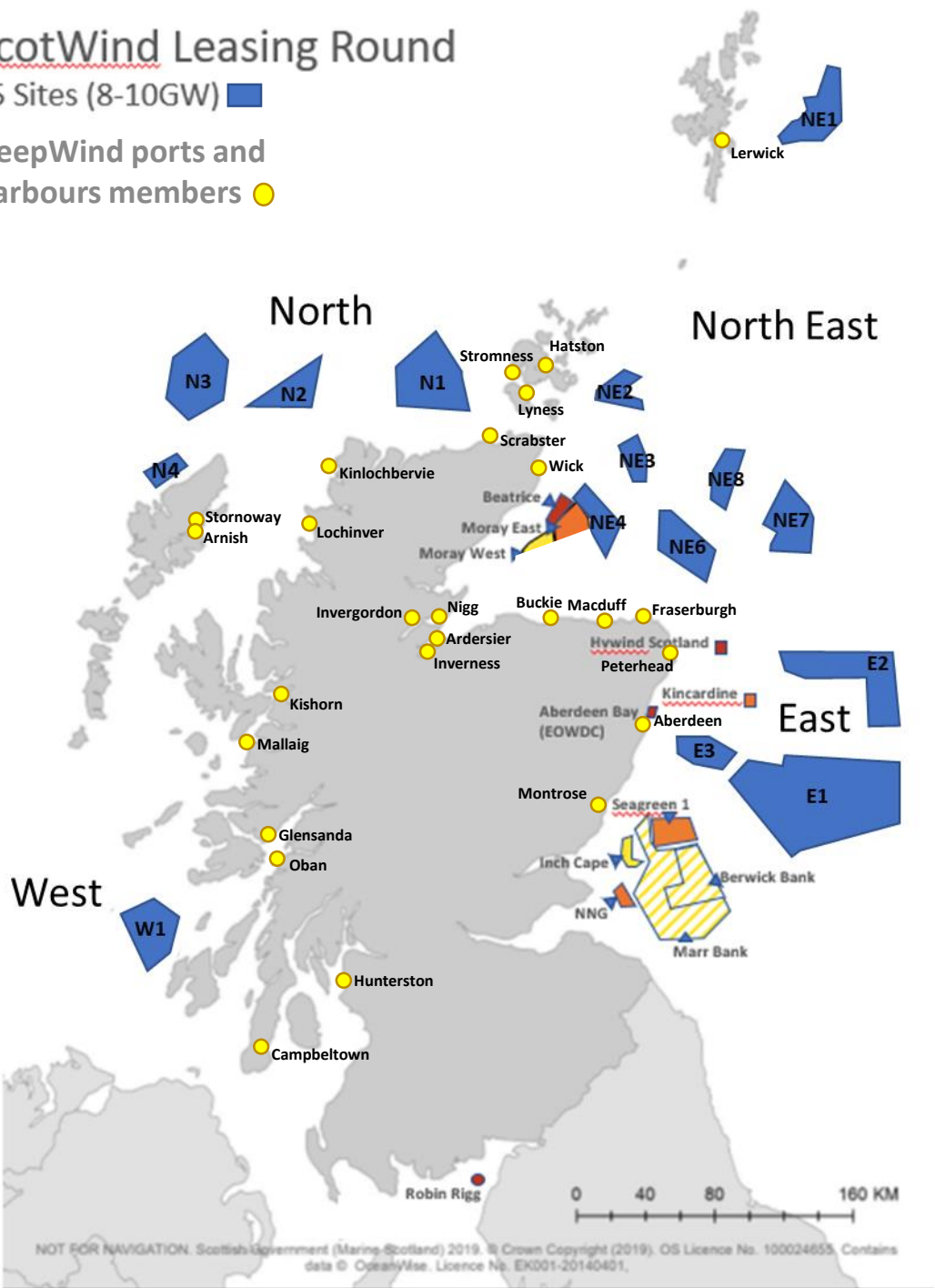
35 developers



ScotWind Leasing Round

15 Sites (8-10GW)

DeepWind ports and
harbours members



Current Wind Farms (9.9GW)

By status

- Operational
- Under construction
- Consented
- Planned

SITE	DEVELOPER	CAPACITY
Robin Rigg	RWE Renewables	174MW
Hywind Scotland	Equinor	30MW
Aberdeen Bay	Vattenfall	93MW
Levenmouth	ORE Catapult	7MW
Beatrice	SSE/Red Rock Power	588MW
Kincardine FOW	Cobra	50MW
Moray East	Ocean Winds	950MW
NNG	EDF Renewables/ESB	448MW
Seagreen 1	SSE Renewables/Total	1500MW
Inch Cape	Red Rock Power	1080MW
Moray West	Ocean Winds	850MW
ForthWind	Cierco	12MW
Berwick Bank	SSE Renewables	2300MW
Marr Bank	SSE Renewables	1850MW
Pentland FOW	Copenhagen Infrastructure Partners	100MW
Salamander FOW	Simply Blue Energy/Subsea7	200MW

892MW

2948MW

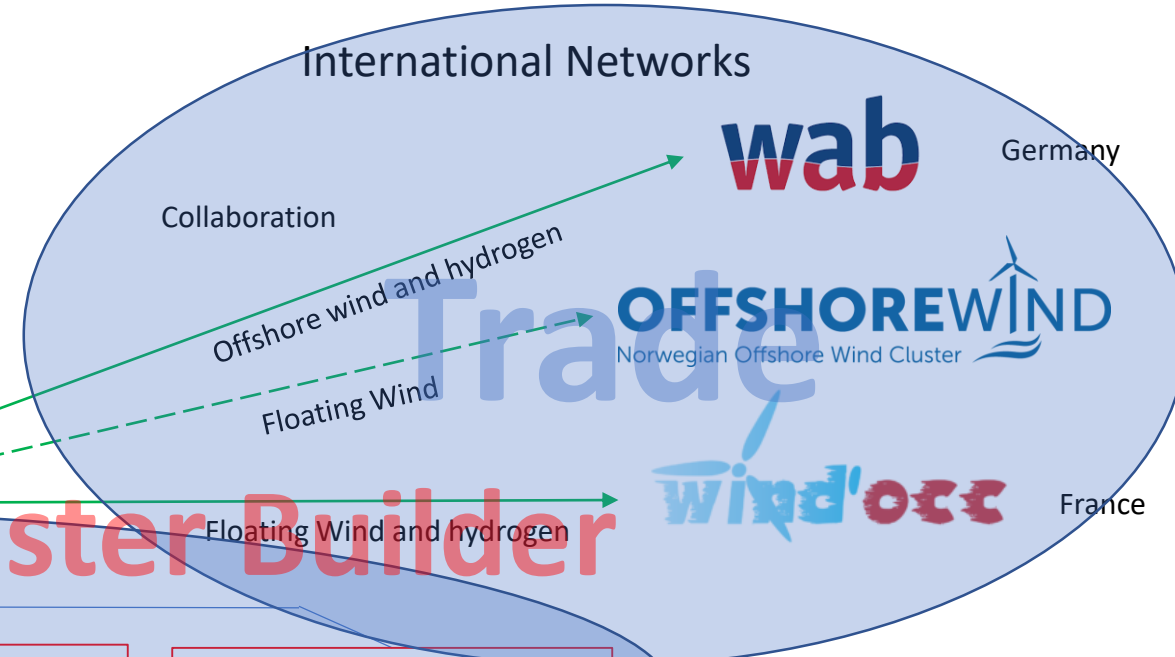
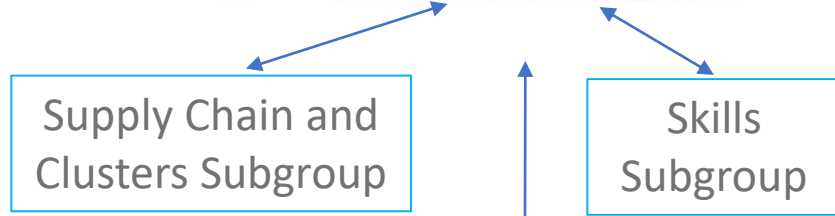
1942MW

4450MW

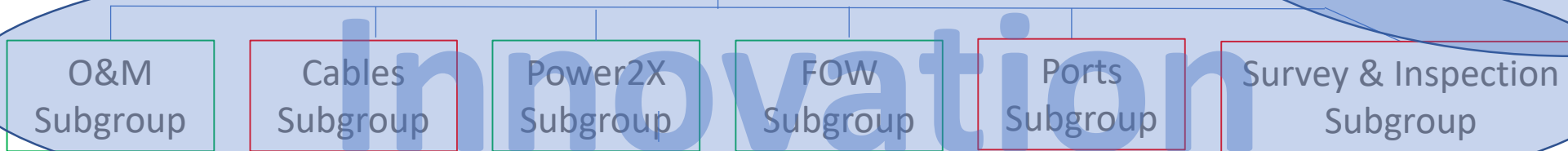




National body Co-chaired by Scottish
Energy Minister and industry



Cluster Builder



Focus subgroups made up of cluster
members and run by members



Subgroups to be formed in the next few
months and currently seeking co-chairs

Research & Innovation

Environmental Science

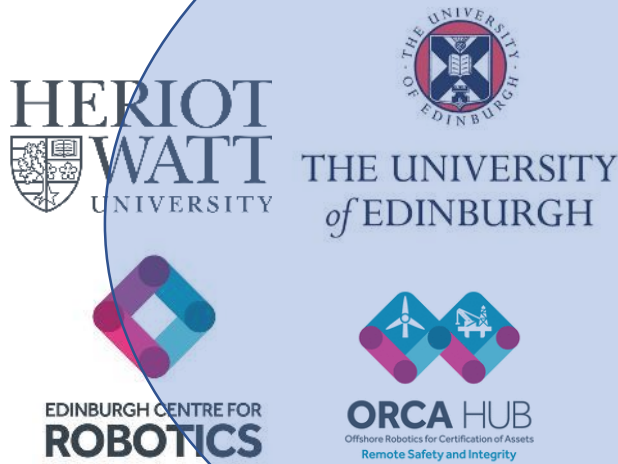


Hydrogen Economy



University members
and partners

Robotics and Automation



Advanced Manufacturing



Cluster
DeepWind
North of Scotland Offshore Wind Cluster
Builder

Oil and Gas Decarbonisation



Centre for
Energy Transition

Subsea Engineering



Cluster Builder Supply Chain Survey

- Capability mapping exercise for the whole cluster
- Opportunity to create a single database for the Scottish offshore wind supply chain
- Accessible online – plan to host it on the Scottish Offshore Wind Portal site – www.offshorewindScotland.org.uk
- We need all members to make the effort and complete the survey before closing date – more to come

Thank You

Paul O'Brien
Cluster Manager
paul.obrien@hient.co.uk

FORTH & TAY
OFFSHORE



Cluster Builder

Launch Event

Powering Scotland's East Coast

Our Vision



- Forth & Tay Offshore (FTO), one of eight UK offshore wind clusters, was established to drive the growth of offshore energy on the east coast of Scotland.
- We're seeking to build upon the area's well-established strengths by developing its supply chain and workforce in support of the commitments in the Offshore Wind Sector Deal. Our vision for 2030 is for the region to become home to a thriving, comprehensive, internationally competitive offshore energy supply chain serving local, national and international projects.

Scottish Engineering



Shona Clive

Project Lead for Forth & Tay Offshore working with the team at Scottish Engineering undertaking project management activities. Scottish Engineering has extensive experience of power and renewables engineering.

- 25 years' experience in the rail and power sectors
- Currently Scottish Engineering's rail cluster project Project Lead
- Wide experience in managing cluster activities including:
 - successful industry events and interventions
 - engaging and supporting cluster members and supply chains and
 - establishing key connections with sector leaders, relevant institutions and other cluster projects.
- Chair of Women in Rail Scotland and member of Women in Transport

Cluster Overview - Video

POLL 1 – CLUSTER MEMBERSHIP

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Introducing

Offshore Wind Cluster Builder



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Investing in a Smart, Sustainable and Inclusive Future



The Offshore Wind Cluster Builder

Enable local business communities to
Drive the creation of sustainable jobs and
Create world-class supply chain solutions



Identify Opportunities



Inform the Community



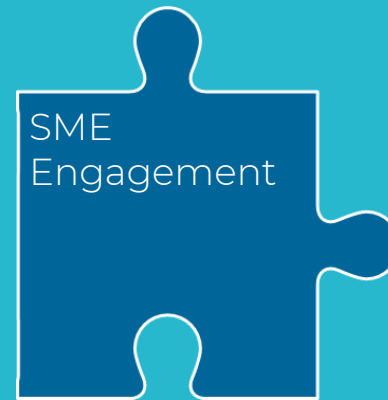
Enable SME Market Entry

How does it work?

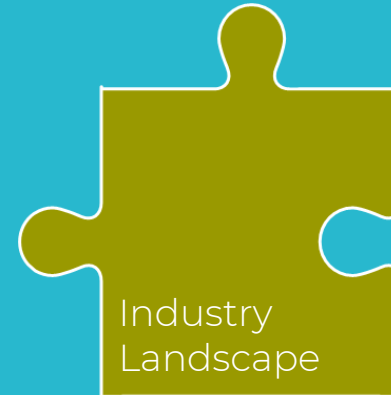
The Cluster Builder will support the offshore wind clusters DeepWind and Forth & Tay Offshore to amplify and compliment their efforts in

- fostering collaboration,
- driving competitiveness and
- improving productivity

of the Scottish offshore wind supply chain



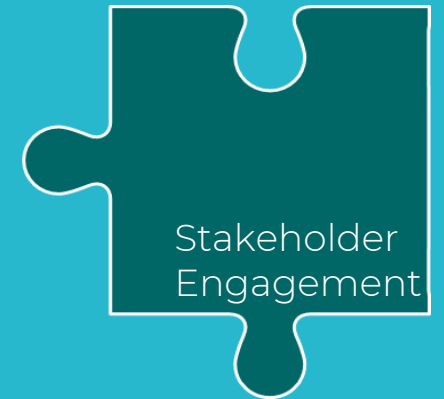
Address industry challenges
Signpost opportunities
Tailored industry workshops



Supply chain capabilities
Contracting Structures
Support Landscape

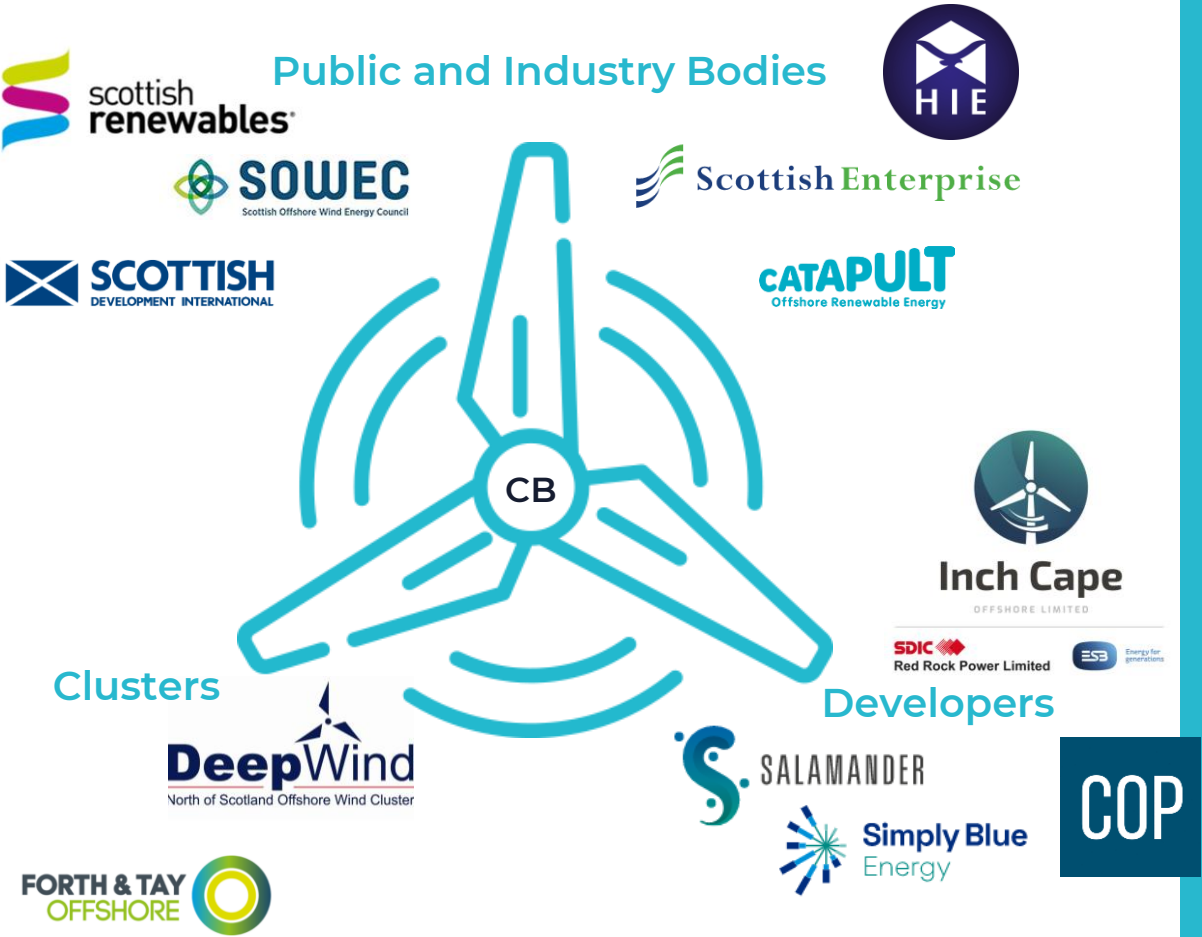


Academia
Partnerships
Export Opportunities



Cluster Engagement
SME Opportunities

How can you benefit?



This is what we do.



Procurement Events



Collaboration



SME 1-to-1 Support



Supply Chain Insights



Cluster Builder Supply Chain Survey

Objectives

- Map the Scottish supply chain landscape, its capability and profile
- Update the publicly available Scottish offshore wind supply chain directory
- Capture the views of the Scottish supply chain and identify opportunities for support via the Cluster Builder initiative and/or its supporting partners
- Support supply chain analysis and reporting of Cluster Builder partners

Expected Uses



Update the current public directory

•
Produce sector reports and presentations

•
Inform future Cluster Builder activities

•
Uncover major support needs by the industry

Information Captured

Survey structure:

**Company
details**

**Company capacity,
track record and scale**

**Company point
of contact**

**Offshore wind
offer**

**Company
perspective**

Responses will be used to create/update the publicly available Scottish offshore wind supply chain directory available at <https://osw.directories.scot> and may be used to update cluster member directories

Info will be anonymised if shared publicly in generic sector reports or presentations from Cluster Builder or its supporting partners, incl. Scottish Renewables Offshore Wind Supply Chain Impact Report. Responses will also be used to inform the CB support programme and will be shared with partners to target their support for companies.

Contact details will not be shared publicly and will only be shared with our supporting partners if respondent agrees to it. Contact details will be used to follow-up on points of clarification regarding survey responses. Xodus, Scottish Enterprise and cluster partners request this information can be used to make companies aware of future support services and activities (opt-in options).

Supply Chain Benefit

Companies participating in this survey get a chance to:

- Signal involvement in offshore wind
- Promote capabilities via the Supply Chain Directory and Clusters
- Access and engage with Cluster Builder activities, including procurement workshops and 1-to-1 support
- Share views with the Cluster Builder and its supporting partners and shape the programme's activities

Updated information
on Scottish Enterprise
Supply Chain Directory



Access to Cluster
Builder support and
activities



Engagement in
Offshore Wind Cluster
network

Next Steps



Fill out the Supply Chain
Survey by
23rd July 2021



Get in touch with your
questions, feedback and ideas
clusterbuilder@xodusgroup.com

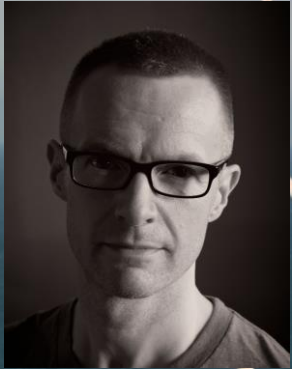


Engage with the clusters

POLL 2 – SUPPLY CHAIN SUPPORT

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DISCUSSION AND Q&A



Ian McDonald
Offshore Wind Specialist
Scottish Enterprise



David Stevenson
Head of Offshore Wind
Policy & Supply Chain
Scottish Government



Paul O'Brien
Cluster Manager
DeepWind



David Webster
Chair
Forth & Tay Offshore



Shona Clive
Project Lead
Forth & Tay Offshore



Scott Hamilton
Renewables Division
Manager
Xodus

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