SOWEC
Scottish Offshore Wind Energy Council

All Energy – Charting a pathway to success

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Briefing – recent activities

- Restructure of working group and initial strategic meeting on 07/03
- Meeting held with Renewable UK Cymru to discuss wider strategic co-operation to leverage regional West Coast opportunity from FOW
- Specific engagement with Skills Group on closer collaboration and direct involvement on potential for secondment/training model between Marine Scotland, Crown Estate Scotland and Developers
- Ongoing engagement to support the growth, presence and resourcing of Scottish Clusters
- Workshop to whiteboard the outline of a ‘success’ vision for ScotWind (and wider sector)

Review of SC&C roadmap and priorities

Area	Priority
Supply Chain Leadership	Create a Scottish Supply Chain capable of delivering transformational growth to the Scottish Economy through the opportunity from ScotWind and the wider offshore wind sector globally.
Capabilities	Support the creation of a Scottish Floating Offshore Wind supply chain that develops and grows alongside the committed investment in the two Green Freeports and assists in establishing improved infrastructure that will attract investment in manufacturing. Look for alternative mechanisms to support those ports that were unsuccessful in establishing Green Freeport status. Develop a compelling matrix of reasons for developers and Tier 1s to procure from Scotland, including but not limited to: cost; quality; ease of doing business; carbon impact; modern and diverse workforce with appropriate skills; wider ESG suitability. Support the mechanisms and roadmaps that lead to increased Scottish content in offshore wind projects.
Tendering	Seek to influence government, policymakers, developers, and tier 1s to enhance the offshore wind contracting system to increase visibility of opportunity and investor confidence, as well as a more equitable distribution of risk between developers, tier 1s and their subcontractors by the introduction of various software platforms, now being evaluated, to enable competitive bidding and secure contracts.
Exports	Increase Scottish supply chain access to export markets by creation of greater visibility of opportunity and targeted business development activities utilizing local in-country support. Maintain a real time or annual database of relevant overseas opportunities linked to Scottish supply chain capability. Develop an enhanced engagement approach with Irish and Welsh clusters and organisations to grow opportunities in the floating offshore wind sector.
Clusters	Interface and provide strategic guidance to the Scottish offshore wind clusters, promoting greater collaboration and interface not only in Scotland, but within the wider UK clusters in order to share opportunities for growth. Encourage setting up of further Business Development strategies and workstreams to appeal more to the supply chain membership. This will involve opportunities for networking and events that will encourage increased connectivity in the industry that enable new suppliers to enter and encourage transition from other industries.

What does success look like?

The devex journey inevitably has a degree of attrition in there – but how much attrition is expected/acceptable from the Scottish OSW pipeline? Roughly 32.5GW available from ScotWind and INTOG – how much does The Industry expect will finally come on line?

- a) >90% of the current capacity
- b) >70% of the current capacity
- c) >50% of the current capacity
- d) <50% of the current capacity

One potential outcome

By 11th May 2033, 17 GW of Scottish OSW is either operational, in construction or post-FID and in early marshalling. The Scottish supply chain consists of a large-scale cable manufacturing plant (sheaths not cores), a tower facility, a blade manufacturing plant, fabrication facilities for anchors (but not chains), and an assembly facility for floating sub-structures – with all of these facilities focused around a multi-hub ports approach which sees all major Scottish port and harbour facilities at or near capacity from 2027 onwards. No nacelle manufacture/assembly is present in Scotland and no new Tier 1 contractors are established in Scotland. Multiple Tier 2, 3 and tertiary suppliers are present in Scotland.

Would The Industry consider this scenario to be a success?

- a) Yes
- b) No

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