

THE GROWING PAINS OF FLOATING OFFSHORE WIND

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WHO **AM I?**

- Charlene Leppard
- Brought up in Glasgow, live in Aberdeen
- Studied Psychology & Management at Aberdeen University
- Oil and Gas Law at RGU
- Member of the Chartered institute of Procurement & Supply.
- Joined Shell in 2018
- 2022 Supply Chain Manager - Marram & Campion ScotWind Projects.
- Passionate about Scotland!



SHELL WIND BUSINESS IN A NUTSHELL



50 YEARS

Experience in
offshore engineering
in the North Sea



20 YEARS

Experience in wind



**20+
COUNTRIES**

Shell's power trading



**GLOBAL
TEAM**

Across Europe, USA
and Asia



24+ GW

Capacity in operation,
under construction and in
the funnel of potential
projects*



844 MW

Total installed capacity
offshore**



103 MW

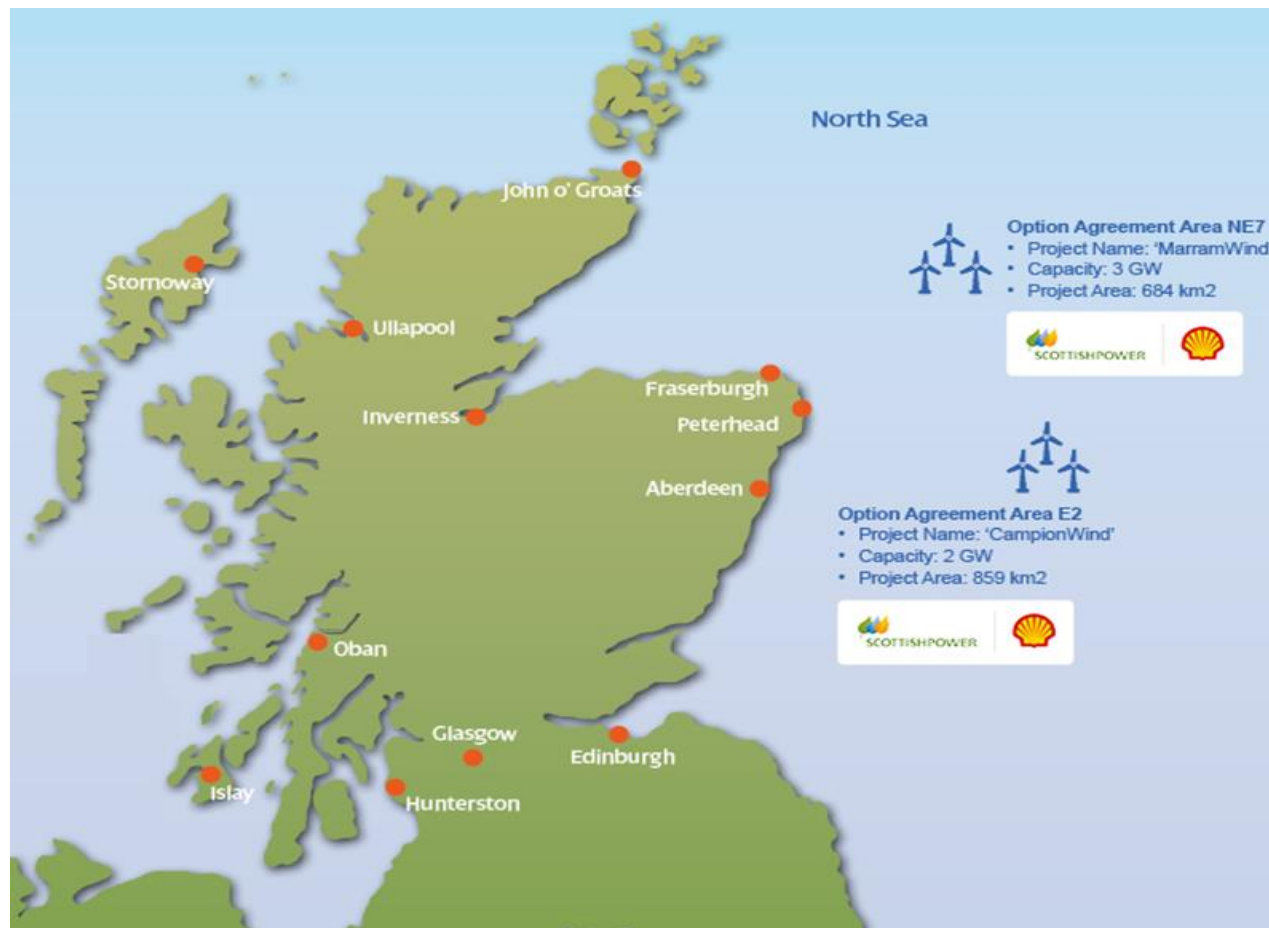
Total installed capacity
onshore***

* Gross capacity; Shell share: 12.9 GW

** Shell's share: 256 MW

*** Shell's share: 51 MW

INTRO TO THE **PARTNERSHIP**



Combined offshore wind portfolio

2GW+

Over 2 GW operational offshore wind

11GW+

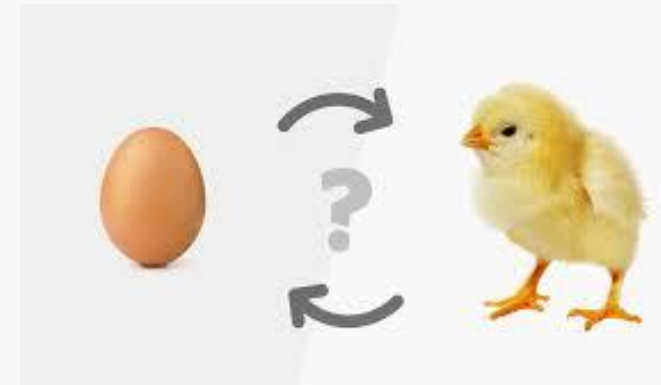
Over 11 GW offshore wind in development

700MW

Additional 700 MW of floating wind in development

GROWING PAINS FOR **FLOATING OFFSHORE WIND?**

- **Local Content vs globalisation of wind**
- **Conflict inherent in a competitive CfD / LCOE vs investment for industrialisation**
- **Early funding of strategic infrastructure vs uncertain consenting and grid connections**
- **Ports, infrastructure, People & Supply Chain readiness**



THE OPPORTUNITY

- Very significant economic opportunity to the supply chain.
- Create a clear vision for UK supply chain in a global context that all can rally behind
- Standardisation of equipment in key supply chain bottleneck areas that require maturation, such as Cabling, Mooring
- People, skills, and innovation development collaboration should be an easy win!



SUMMARY MESSAGES

- **Developers are working with SOWEC to co-develop a strategic investment model (SIM) to invest in supply chain readiness along with private and public sector investment for the creation of new offshore wind capability in Scotland.**
- **Scotland's Collaborative framework development is only one tool to support the local supply chain aspirations in a co-ordinated way.**
- **We must be strategic about how we drive collaboration beyond Scotland, to compete in a global market doing what we can to make it easier for the supply chain to deliver locally and globally.**



