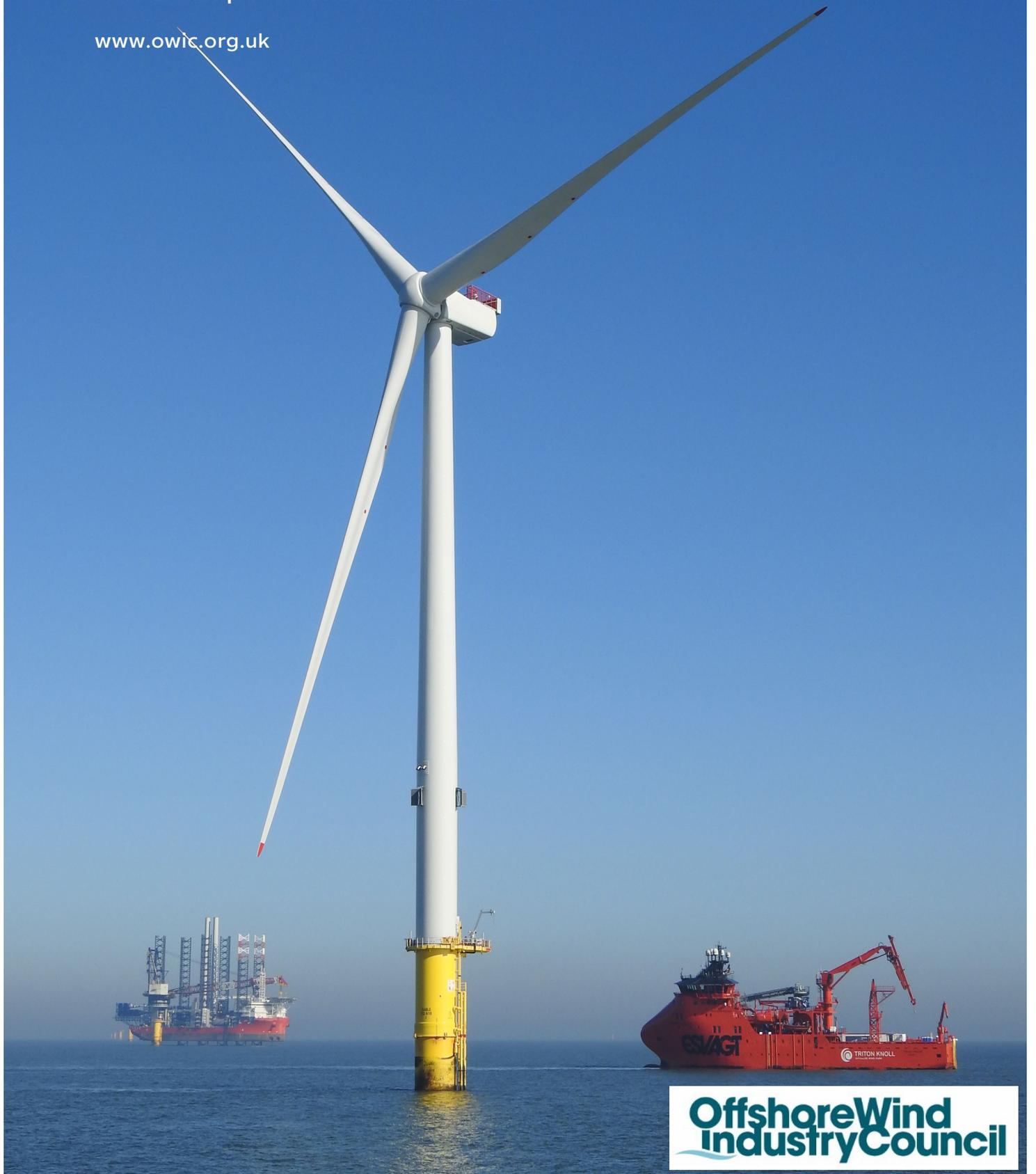


Offshore Wind: Building on the UK's Success

COP26 Report – November 2021

www.owic.org.uk



Contents

The Offshore Wind Industry Council (OWIC)	3
Foreword	4
Introduction	5
Aviation and Radar	8
Innovation	10
Offshore Transmission	11
Offshore Wind Growth Partnership	13
Pathways to Growth	15
People and Skills	17
Supply Chain and Clusters	19

The Offshore Wind Industry Council (OWIC)

The Offshore Wind Industry Council (OWIC), a senior Government and industry forum, was established in May 2013 to drive the development of the world-leading offshore wind sector in the UK.

OWIC is comprised of members drawn from the leading UK and global firms in the offshore wind industry, including developers and original equipment manufacturers.

The Council oversees and drives the implementation of the Offshore Wind Sector Deal, co-Chaired by Industry and the UK Minister of State for Business, Energy and Clean Growth.



OWIC is formed of the following companies:

Associated British Ports	Ørsted
Crown Estate Scotland	Red Rock Power
Department for Business, Energy, and Industrial Strategy (BEIS)	RenewableUK
EDF Renewables	RWE Renewables
EDP Renewables	Scottish Power
Equinor	Siemens Gamesa
GE	SSE Renewables
Green Investment Group	Tekmar Group
JDR Cables	The Crown Estate
Offshore Renewable Energy Catapult	Vattenfall
Offshore Wind Ltd	Vestas



Foreword



As the global leader in offshore wind, the UK is proud to share its success with other countries looking to realise their offshore wind ambitions, as nations come together at COP26.

Ever since the UK's first offshore wind farm began generating in 2000, we have been able to accelerate innovation and reduce costs to deploy over 10 gigawatts (GW) of offshore wind in UK waters – with an ambition to reach 40GW by 2030, including 1GW of floating wind.

Offshore wind forms the backbone of the UK's commitment to net zero carbon emissions by 2050 and the UK Prime Minister's vision for a Green Industrial Revolution. The technology is also at the heart of a green economic recovery post COVID-19 and a Just Transition from fossil fuels to clean power which brings economic and environmental benefits to all those working in our modern energy sector.

The cost of new offshore wind in the UK fell by 65% between 2015 and 2019 (to less than £40/MWh) at which point an ambitious Offshore Wind Sector Deal was agreed between Government and Industry. This deal highlighted key opportunities, challenges, and commitments which the Offshore Wind Industry Council (OWIC) has been working with Government and key stakeholders to address.

This report illustrates the effort and progress the sector is making in all parts of the industry – from supply chain growth and jobs, to consenting challenges around grid connection, aviation, and environmental factors, to innovation, the transition from traditional energy industries and understanding how wind operates as a key part of the wider UK power system.

A shared vision and effective collaboration have allowed our industry to progress towards our goal, supported by recent Government announcements.

Offshore wind is a clean, low-cost source of energy which is supporting thousands of high-wage, high-value jobs in the UK, transforming our coastal communities. Our in-depth research shows that 26,000 people work in our sector and this is set to rise to 69,000 over the next 5 years. Our UK-based supply chain is growing rapidly; for example, major investment announcements in new factory facilities totalling over £900 million have been made this year, creating and securing more than 2,500 new jobs in our manufacturing sector alone.

We have learned valuable lessons during our two decades of offshore wind growth in UK waters, and we look forward to sharing our advice and expertise with others during COP26, so that they can emulate our success. We can help them on that journey by exporting our unrivalled offshore wind know-how, goods, and services worldwide, bringing benefits to everyone.

Danielle Lane
OWIC Co-Chair

Introduction

The eyes of the world are firmly on the UK in the year of COP26, looking for us to lead by example at the most important UN climate change summit for years. Offshore wind is a key clean technology which we can showcase, for example by pointing to our state-of-the-art blade factories in Hull and on the Isle of Wight, by showing other countries how former oil and gas workers in Aberdeen are successfully making the transition into renewables, and by highlighting our two cutting-edge floating offshore wind farms generating successfully in Scottish waters. Other countries across the globe have the potential to upscale their offshore wind ambition vastly, including Brazil, India, Mexico, Turkey, Argentina, Colombia and Vietnam. Many more can do so by embracing innovative floating wind to unlock further sites for development, including Japan, South Africa, Australia and Morocco.

We have already done the heavy lifting with our early pathfinder projects at the start of the millennium and the spectacular cost reductions we have achieved since then by scaling up exponentially and by learning by doing. Other countries can build low-cost utility-scale projects right away as a result. We can also empower countries to make the right choices by sharing the experience we have in market development. Our competitive auctions for contracts to generate clean power are world-leading. Wind and solar are now the cheapest ways to generate new power bar none – cheaper than new gas or nuclear.

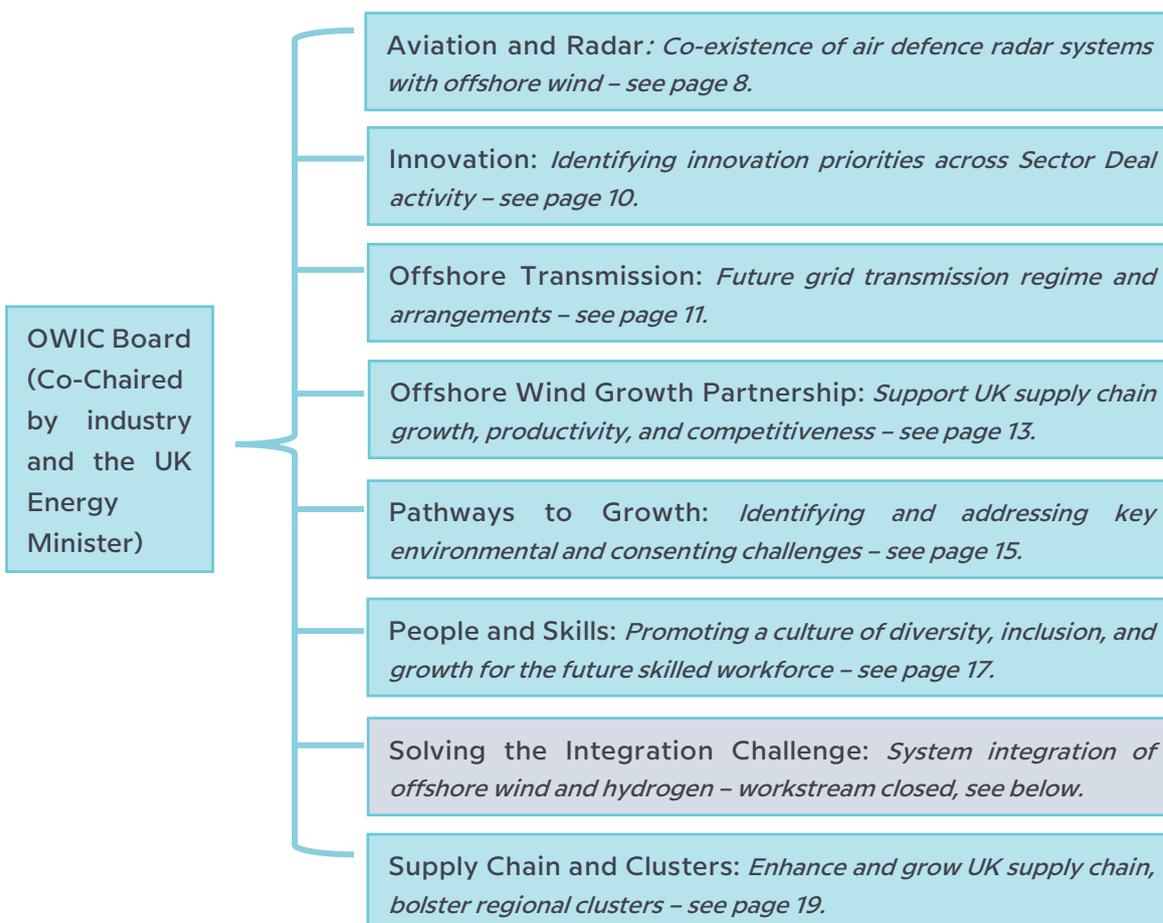
These successes should inspire other countries to set over-arching goals to decarbonise as quickly as possible, and to specify milestones along the way as we have done. As part of the UK Government's legally-binding commitment to reach net zero greenhouse gas emissions by 2050, the Prime Minister has set a target to cut emissions by 78% by 2035. As a key measure to ensure we get there, the Government wants to see 40GW of offshore wind installed by 2030, nearly quadrupling our current capacity. These targets send vital market signals which secure billions in investment; our research shows that more than £10 billion a year is being invested in our sector over the next five years. Another key signal was the publication of the landmark Offshore Wind Sector Deal¹ in March 2019. Since then, the industry has been working closely in partnership with key UK government departments and stakeholders to ramp up deployment by addressing the barriers we face and maximising the opportunities we offer.

Initially shaped by the key pillars under the UK Industrial Strategy (Ideas, People, Infrastructure, Business Environment, Places), OWIC established several key strategic workstreams to help address some of these key challenges in large scale deployment of offshore wind, whilst also looking to identify opportunities for synergies and collaboration with other parties and sectors.

Each workstream drives key deliverables under the Sector Deal, overseen by the Council Board, and supported by the OWIC Delivery Coordinator and a Stakeholder and Communications group.

The workstreams working under OWIC can be identified as follows:

¹ Read the Offshore Wind Sector Deal [here](#) – N.B. The industry is now working to a revised target of 40GW by 2030 including 1GW of floating wind since the Prime Ministers announcement in 2020.



The *Solving the Integration Challenge* workstream has now closed following the publication of two reports. OWIC commissioned Energy Systems Catapult and the Offshore Renewable Energy Catapult to deliver a project to address the integration challenge in two workstreams. The two workstreams provide complementary perspectives on different aspects of the potential role and integration of offshore wind and hydrogen into the energy system.

The Energy Systems Catapult² was commissioned to:

- Consider the impact of very high levels of offshore wind on the energy system, and how these impacts could be mitigated; and
- identify opportunities to strengthen offshore wind's role in delivering innovative solutions to system integration.



The analysis, published in October 2021, found that:

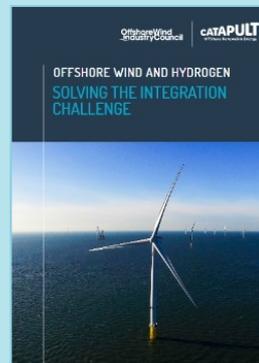
- i. Credible systems are possible at significantly higher levels, with up to 150GW systems modelled.
- ii. Hydrogen plays an important role in decarbonising certain sectors, particularly industry and some transport and heating.
- iii. Future systems with a diverse generation mix, including clean thermal and nuclear power, have advantages over a system dominated by a single technology.
- iv. Reform of electricity markets is essential to unlock the potential of offshore wind and ensure a more flexible demand side is established to match higher penetrations of wind.

² Solving the offshore wind integration challenge report can be read [here](#).

The Offshore Renewable Energy Catapult³ explored the opportunities for hydrogen generation and use coupled with offshore wind generation, including the potential for export of both hydrogen and electricity, a potential development roadmap, and the likely economic benefits to the UK.

The study, published in July 2020, considered the viability, and economic opportunities, of combining offshore wind with hydrogen, via electrolysis. The analysis found that:

- i. Offshore wind with green hydrogen is a major UK opportunity. The UK has outstanding offshore wind resource, with the potential for over 600GW in UK waters, and potentially up to 1000GW, well above the figure of 75-100GW likely to be needed for UK electricity generation by 2050.
- ii. The industrial base is strong. UK has an established industry base to build on.
- iii. Our universities provide the underpinning science and engineering for electrolysers, fuel cells, and hydrogen, and are home to world-leading capability in these areas.
- iv. By 2050 green hydrogen can be cheaper than blue hydrogen. With accelerated deployment, green hydrogen costs can be competitive with blue hydrogen by the early 2030s.
- v. Action is urgent: developing green hydrogen in the next 5 years will be critical to achieving cost reduction and growing a significant manufacturing and export industry, based on UK technology.
- vi. This can create a major new manufacturing sector for the UK. The overall demand for hydrogen by 2050 in the UK is predicted to be between 100- 300TWh. It is estimated to be 25% of Europe's energy supply, with much more needed globally. The combination of additional OSW deployment and electrolyser manufacture alone could generate over 120,000 new jobs, replacing those lost in conventional oil and gas and other high carbon industries.
- vii. And generate significant economic impact: the study estimates a cumulative GVA of £320bn between now and 2050.
- viii. Production needs a market, investment needs both. Government intervention across multiple Departments is needed to support the concurrent creation of supply and demand in this new industry.



This OWIC COP26 report aims to set out the progress of each of these workstreams, signposting their key outputs and highlighting the various challenges the UK has identified along the road to 2030. The report builds on OWIC's 18-month delivery report and supports further information which can be found on the OWIC website: <https://www.owic.org.uk/>



Alicia Green

Delivery Coordinator, Offshore Wind Industry Council

³ Offshore Wind and Hydrogen: Solving the integration challenge report can be read [here](#).

Aviation and Radar

Programme A – Air Defence: To find ways to mitigate the impacts of offshore wind farms on air defence radar systems and ultimately, the co-existence of air defence and offshore wind, a Joint Air Defence and Offshore Windfarm Mitigation Taskforce has been established, overseen by a senior level Joint Programme Board, and supported by a Wing Commander Senior Programme Manager within the Royal Air Force (RAF) and the OWIC Workstream Lead.

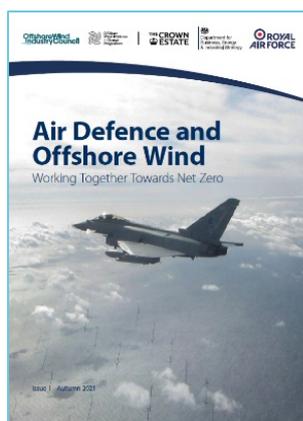
The partnership brings together OWIC, The Crown Estate through its Offshore Wind Evidence and Change Programme⁴, the Department for Business, Energy and Industrial Strategy (BEIS) and the Ministry of Defence (MOD).

In September 2021, the Taskforce published a first iteration of its *Strategy and Implementation Plan*⁵ (the Plan), supported by both BEIS and MOD Ministers. The Plan highlights the importance of strategic collaboration and identifies that technical mitigations exist that could be introduced using new surveillance technology to distinguish between wind turbines and aircraft with greater precision than current systems.

“Strategic-level direction and senior level buy-in has created an environment for open and honest collaboration that has been at the heart of the Joint Aviation Task Force’s success. Furthermore, a willingness to break this issue down into ‘bite-size’ chunks has meant that focus has been maintained on the overall end state – coexistence of the offshore wind industry with UK Defence assets. I have been delighted with the progress to date, and while there is still a long way to go, there are clear lessons that our international partners can use to further their own collaborations to complex problem solving.”



Paul Cooley
Workstream
Sponsor
SSE Renewables



The Strategy was informed by a series of Concept Demonstration activities (live flight trials with radar mitigation) to better understand the capabilities of mature mitigation solutions. Studies and work are planned to update the Plan going forward.

The sector has also funded a MOD Air Defence Mitigation Feasibility Study, with the MOD funding a Next Generation Mitigation Study (led by Defence Science and Technology Laboratory). MOD is continuing work on operational analysis and jointly the Task Force is working on processes development including solution procurement and cost-sharing options. The BEIS funded, MOD (Defence and Security

Accelerator (DASA)) delivered, Innovation Challenge awarded £2.1m to six projects in Phase 1 and £3.7m for seven projects in Phase 2.

⁴ Further information about the Offshore Wind Evidence and Change Programme can be found [here](#).

⁵ ‘Air defence and offshore wind – working together towards Net Zero’ can be read [here](#).

Programme B – Surveillance and Airspace: A new programme on civil aviation has been established including plans for a 3-in-1 study on Layout, Stealth and Data led by the Offshore Renewable Energy Catapult. Working with the Department for Transport (DfT), BEIS, MOD, the Civil Aviation Authority (CAA), and NATS; OWIC is looking to establish a strategic solution around offshore Transponder Mandatory Zones (TMZs) and publish a study on the future requirements for offshore aviation Communication, Navigation and Surveillance (CNS).



Dujon Goncalves-Collins
Workstream Lead, Vattenfall

Innovation

Innovation has been at the heart of collaborative work across the OWIC workstreams to ensure new ways of thinking and ideas are implemented across the board. Supported by the Offshore Wind Innovation Hub's Technical Advisory Group and 'Innovation Roadmaps', the innovation workstream looks to ensure that the sector's innovation priorities are captured within OWIC's work.

Collaboration across the OWIC community has included investigation of data and digital innovation opportunities central to offshore wind deployment and consenting, an area of focus for the 'Pathways to Growth' workstream.

Having the necessary national skillset is essential to enabling innovation and underpinning this will be understanding the future innovation skills requirements of the sector, a task being initiated in support of the OWIC People and Skills workstream.

From an international perspective the team's innovation priorities have been reviewed against those of ETIP Wind (European Technology and Innovation Platform) the body that defines and agrees on concrete research and innovation (R&I) priorities and communicates these to European institutions. This has proven the accuracy of sector innovation priorities for the UK.

Looking ahead, the innovation workstream aims to identify what gaps currently exist in available innovation support and determine what a comprehensive and targeted innovation support programme would constitute. Enabling innovation is a complex equation involving research, funding, contacts, test facilities, commercialisation support and more, but it can have real impact on building a high value supply chain of tomorrow.



Andrew Stormonth-Darling
Workstream Lead, Offshore Renewable Energy Catapult

"Innovation is central to the broader ambition of the UK remaining at the industry's cutting edge. Finding new and exciting ways of working more efficiently, effectively, and safely, and delivering novel solutions to the sector, ensures that UK businesses are more competitive in an ever-growing global marketplace. The pace of growth is so astounding that this is simply an opportunity that cannot be missed, and in supporting innovation the UK can ensure that more high skilled jobs are created and that the products and services established can be exported around the world."



Andrew Jamieson
*Workstream Sponsor
Offshore Renewable
Energy Catapult*

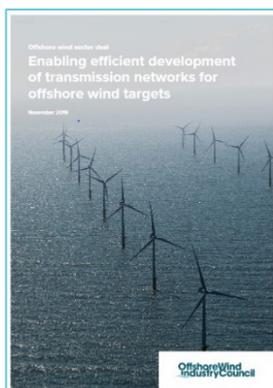
Offshore Transmission

A specific barrier identified in the Sector Deal was the current OFTO regime. The current approach to designing, building, and operating offshore transmission was developed when offshore wind was a nascent sector and industry expectations were as low as 10GW by 2030. However, in the context of increasingly ambitious targets, constructing individual point to point connections for each offshore wind farm may not provide the most efficient approach and could become a major barrier to delivery given the environmental and local impacts, particularly from the associated onshore infrastructure required to connect to the national transmission network.

“Delivering 40GW by 2030 and meeting a long-term net zero goal requires a new approach to connecting offshore wind farms to the network in future. The offshore transmission network review is a welcome and vital part of the picture to reduce costs for consumers and impacts on the environment and coastal communities”.



*Danielle Lane
Workstream Sponsor
Vattenfall*



The OWIC Offshore Transmission Group workstream published two papers, setting out the long-⁶ and short-⁷ term parameters that they consider need to be addressed to mitigate the grid transmission barriers to deployment and the timescales required to enable 2030 targets. These were then discussed with key stakeholders including BEIS, Ofgem and the Electricity System Operator (ESO).

In July 2020, Secretary of State Kwasi Kwarteng announced the Offshore Transmission Network Review. The Review brings together the key stakeholders to consider all aspects of the existing regime, including learning from other countries, to determine how connections can be done more efficiently considering an appropriate balance between environmental, social and economic costs. Its terms of reference, focus on both identifying actions that can be taken to facilitate coordination between projects in the short to medium term, plus a longer-term strategic review to develop a new regime that can ensure a more coordinated approach for the future leasing site.

The OWIC Offshore Transmission group will continue to be involved in the OFTO Transmission Network Review. OWIC will continue to be actively involved in this work to provide an industry perspective, with the OWIC Offshore Transmission workstream lead chairing the independent Expert Advisory Group to support this work. The group itself continues to provide inputs into and a review of the work being undertaken by various work streams. This includes independent

⁶ Enabling efficient development of transmission networks for offshore wind targets can be read [here](#).

⁷ Transmission review Short-term solutions can be read [here](#).

analysis, where necessary, to ensure that the technical and commercial challenges are understood and addressed by the Review.



Zoe Keeton

Workstream Lead, RWE Renewables

Offshore Wind Growth Partnership

The flagship Offshore Wind Growth Partnership (OWGP) was set up in 2019 to support the growth of the UK supply chain through improvements in productivity and competitiveness. The programme was established as part of the Sector Deal and responds to recommendations in the Whitmarsh Review⁸.



OWGP is funded by the OWIC members and has a budget of £100m up to 2030. By October 2021, OWGP has awarded £4.6m to a total of 80 companies and allocated £18.3m to new supply chain programmes.

OWGP supports the supply chain through a combination of grant funding and business transformation services. The grants provide funds to enable companies to grow their capacity and capability whilst the business transformation programmes provide access to business improvement specialists to improve competitiveness.

The grant funding programme currently consists of smaller innovation grants (£25k to £100k) for the development of new products and services and larger development grants (£100k to £1m) to support company growth. The most recent innovation grant call has been targeted at technology to accelerate consenting and site development – a key focus area to achieve net zero targets and an area where UK innovation can be exported to rapidly growing global markets.

The business transformation programme provides access to sector specific business support for new market entrants and companies with high growth ambitions through the Wind Expert Support Toolkit (WEST) programme. This is a foundation level programme to increase the number of UK companies winning work in the sector. For larger companies with a turnover of over £5m, OWGP is offering access to the Sharing in Growth programme that provides long term support to improve business performance from the board room to the manufacturing facility. Over 40 companies have now benefited from the WEST programme and 8 companies are currently participating in Sharing in Growth.

OWGP has an independent board of directors to provide strong governance and the programme is delivered by a dedicated team from the Offshore Renewable Energy Catapult. This structure ensures accountability but allows the programme to be delivered efficiently with the agility to

“The senior industrial leaders in the OWGP Board take a proactive approach in utilising their experience in driving the strategic direction, and OWGP has rapidly established itself as the cornerstone of supply chain growth in the UK. It is an efficient and effective way to provide support directly to supply chain companies and progress is carefully measured to track growth in jobs, turnover, exports and IP.”



*Halfdan Brustad
Workstream
Sponsor
Equinor*

⁸ OWIC Response to the Whitmarsh Review can be read [here](#).

respond to supply chain needs. The latest opportunities for supply chain support are available on the OWGP website⁹.

The OWGP grant and business transformation activities are complemented by direct supply chain engagement activities led by the developers. Examples of these can be found in the Collaborating for Growth Playbook¹⁰.



Andrew MacDonald
OWGP Programme Director, Offshore Renewable Energy Catapult



Isaac Tavares
Workstream Lead & OWGP Reference Group Chairman, Equinor



⁹ OWGP Website can be found [here](#).

¹⁰ Collaborating for Growth Playbook can be read [here](#).

Pathways to Growth

Pathways to Growth (P2G) is the Sector Deal's workstream focused on identifying and addressing the key environmental and consenting challenges that will be a barrier to the UK meeting its offshore wind 2030 target and playing its full role in delivering net zero. Recognising the scale of the challenge, P2G brings together government representatives, Statutory Nature Conservation Bodies (SNCBs), and industry across the UK's Devolved Administrations to work together in partnership - to have an open and frank debate about what is required, what is achievable, and the actions needed if offshore wind is to achieve its full potential in delivering net zero whilst maintaining and enhancing the environmental status of our seas.

Working collaboratively

The work is supported by the P2G Coordination Group - a collaborative and proactive group comprising representatives of the key UK Devolved Administrations,

consenting organisations as well as representatives from The Crown Estate and Crown Estate Scotland, industry trade bodies and their nominated developer representatives.

The Coordination Group's activities are overseen by the P2G Executive Board with Director level representation from BEIS, Defra, Scottish Government and Welsh Government. The Board is chaired by Benj Sykes - Workstream Sponsor and Head of Market Development, Consenting and External Affairs at Ørsted.

Coordinating delivery

Working together, the P2G Coordination Group has prioritised a list of the ten biggest environmental and consenting challenges that are causing delays and uncertainty in offshore wind consenting. In 2021 we have worked together to agree roadmaps for each of these ten issues - each roadmap setting out key milestones for work already underway or planned that collectively will deliver resolution to the issues. The roadmaps are also a tool to help identify opportunities to share best practice, work on common approaches across the UK and discuss and recommend new activities necessary to close any gaps that the road mapping process highlights.

Three of the ten issues have been identified by the Coordination Group as the most critical issues to resolve to support the scale of offshore wind deployment required to meet 2030 and net zero targets. These top three issues are:

- Clarifying the approach to the Habitats Regulations derogation process including identifying and implementing compensation measures where that is deemed necessary;

"Working in partnership is critical to delivering the genuine step change needed to resolve consenting and environmental challenges and to support the offshore wind sector deliver the 2030 and ultimately the UK's net zero targets. The commitment by the P2G Coordination Group members to work collaboratively has seen some major steps being taken towards delivering answers in 2021, laying the groundwork for resolving long-standing challenges as we move into 2022 and as the industry continues to scale up."



*Benj Sykes
Workstream
Sponsor
Ørsted*

- Finding an effective means of ensuring that SNCBs and regulatory bodies can scale up their resourcing to meet the volume of consenting casework needed to meet the UK's offshore wind targets; and
- Reducing the uncertainty around calculating cumulative impacts on seabirds by improving the evidence base and agreeing a consistent approach to carrying out cumulative impact assessments.

Other issues include taking steps to ensure underwater noise is managed in a way that protects the environment and enables development and ensuring that learning and evidence is more rapidly adopted by decision makers.

Delivery so far

2021 has seen the delivery of some pivotal activities highlighted in the P2G roadmaps and a major step forward in addressing P2G's ten prioritised environmental and consenting issues. These include the publication of Defra's MPA Compensation Guidance consultation, the delivery of the Offshore Wind Environmental Evidence Register and the first tranche of projects securing funding through the Offshore Wind Evidence and Change Programme (OWEC).

P2G has taken responsibility to actively support Government's efforts to ensure that the anticipated volume of offshore wind consent case work will be resourced to meet our 2030 and net zero targets. The group is working together to define all the interlinked issues that must be addressed if we are to attract the right skills into the sector and ensure those skills are not lost from the organisations they are recruited to. P2G is also funding the development of a suite of e-learning modules for those new to the sector and specifically to consenting and environmental roles. The e-learning modules will be delivered in early 2022.



Brian McFarlane

Workstream Lead, SSE Renewables

People and Skills

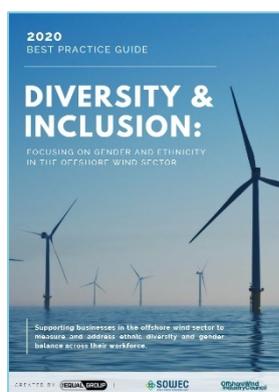
The sector is working to ensure that, as offshore wind scales up, it is supported by a workforce of the right people, in the right place and at the right time. The rate of growth in the sector needs to be accompanied by upskilling of existing employees, bringing people in from other sectors and ensuring a longer-term pathway through education and academia. The sector is committed to becoming increasingly diverse and inclusive. A strategy advisory board, the Investment in Talent Group, has been established comprising senior representatives from across the sector, Government, and the devolved administrations to drive delivery. Three working groups support the Group including: Diversity, Military and Apprenticeships. Within the Group and working groups, key areas of work include:

“Clarity over timing, scale and location of the UK pipeline enables the industry to focus on developing a diverse and inclusive culture which attracts and supports people from the whole of society. It means ensuring that we can support movement through the Just Transition, encouraging everyone from those in their first careers to career changers to make this the industry of their preferred choice.”



Melanie Onn
*Workstream
Sponsor
RenewableUK*

Employment Data – The industry developed a workforce and skills model in partnership with the National Skills Academy for Rail (NSAR) to track and report on workforce data. The latest research¹¹ shows that the number of people working in direct and indirect jobs in the UK’s offshore wind industry will rise significantly from 26,000 today to over 69,800 by 2026. Most of the jobs will be created in parts of the country which urgently need levelling up, including the north-east of England, Yorkshire and The Humber, East Anglia and Scotland. This will be supported by over £60.8bn of private sector investment over the next five years. The industry is currently surveying¹² companies for the next instalment of data.



Diversity – The industry has committed to employing 33% women in offshore wind by 2030 (up from 18% in 2020) with an ambition to reach 40% and 9% BAME employees in offshore wind by 2030 (up from c.5%) with an ambition to reach 12%. The Diversity Working Group has been set up to deliver these ambitions. In partnership with The Equal Group, the Investment in Talent Group have created a best practice guide¹³ to help businesses and companies ensure their workplaces are accessible and attractive to those currently under-represented in the sector, and a charter for supporting women in the industry. It is already showing

¹¹ The Offshore Wind Skills Intelligence Report can be downloaded [here](#).

¹² The latest Skills Intelligence Model survey can be found [here](#).

¹³ The Diversity and Inclusion Best Practice Guide can be read [here](#).

improvements in the number of women being employed, including an increase in the proportion of women on apprenticeships. More recently the working group has started to look at what needs to be done to improve diversity in terms of visible and invisible disabilities and to support social mobility.

Apprenticeships – The Apprenticeship Working Group has set a target for 2.5% of the employed offshore wind workforce to be from/ on apprenticeship schemes by 2030 (equating to roughly 3000 apprentices in the sector). In 2020 there were approximately 1.8% apprentices in the workforce. The working group is looking at ways to improve the numbers in the industry including a potential offshore wind industry apprenticeship programme. A review of how apprenticeships are delivered within industry is currently underway with the Apprenticeship Working Group.

Transition into the industry - As the anticipated growth in the industry is likely to be rapid in the near term, it is important to support the movement of people into the industry from other sectors, particularly the fossil fuel-based sectors. The Investment in Talent Group includes a Just Transition champion to ensure a focus on this area. In addition, it is beginning to look at how best to support employees from the oil and gas industry who have lost or at risk of losing their jobs.

Offshore Access Pathway – The sector will deliver an improved Offshore Access Pathway, facilitating greater job-mobility between offshore industries. A joint statement was agreed by key cross sector stakeholders committing signatories to activity work in collaboration towards ever greater synergy of good working practice and mutual recognition of standards. A Memorandum of Understanding is currently being prepared to commit and provide the framework for the Offshore Wind, Oil and Gas, and Maritime contracting sectors to collaborative working on synergy analysis for the alignment, as far as possible, of training standards. An access portal will also be launch in 2021 to provide clear information on training requirements.

Military – There are a growing number of veterans in roles across the industry and the newly established Military Working Group is looking at how best to support the transition for former military personnel identifying the challenges service leavers face when trying to find employment in the offshore wind industry, and develop mechanisms and initiatives that aim to address them; helping the industry understand the benefits veterans can bring to the offshore wind industry and offer easily accessible advice and guidance to service leavers to educate on the opportunities that exist within the industry. A LinkedIn group has been established to develop a network of ex-military in the industry with the primary aims of providing informal mentoring for serving, service-leavers and veterans that are considering a career in offshore wind, supporting newcomers into the industry, and then helping veterans stay in the industry by facilitating access to opportunities. A military transition webinar has also been delivered¹⁴.



Celia Anderson
Workstream Lead, RenewableUK

¹⁴ Watch the military careers webinar series [here](#).

Supply Chain and Clusters

The Supply Chain and Clusters Workstream was established to support the delivery of an increasingly important topic: *how a robust, competitive, supply chain can be further developed to compliment the increased deployment of offshore wind, thereby securing the 'back-bone' of our industry.*

In late 2020, the workstream was slightly 'revamped' with a range of key deliverables set to progress. The most immediate task was to help shape the UK policy arena and the overall process for offshore wind project supply chain plans, ensuring that methodologies relating to data collection as part of these activities was reported in the most appropriate way e.g., now including export activity.

Linked to this, the workstream has also led the development of a broader industry-wide reporting framework to ensure that well beyond project activity, the range of benefits that the industry delivers are better showcased.

The workstream is in close liaison with UK Government to provide ongoing tangible feedback regarding aspects where the UK supply chain could be better strengthened to support the future of offshore wind. We have seen a number of welcome announcements from UK Government initiatives aimed at strengthening ports, OEMs and supply chain companies required for successful delivery of renewable and Net Zero targets.

In early 2021, the Supply Chain Workstream combined with the Clusters Workstream for closer working, transparency and alignment. Clusters¹⁵ play a valuable role as part of the UK Industrial Strategy commitments relating to offshore wind and there are currently eight of these around the UK, representing the key regions that host UK offshore wind projects. The clusters operate on the ground daily, flying the flag for the local regions, facilitating networking activities across and between the supply chain tiers and maximising business opportunities both at home and abroad. The clusters will continue to play an increasingly valuable role as the new supply chain plan process becomes embedded and as further fixed and floating offshore wind is deployed.

Finally, the workstream is pleased to have further strengthened its relationship with Scottish counterpart the Scottish Offshore Wind Energy Council (SOWEC). Following recent recommendations, OWIC and SOWEC have begun working more closely and with a number of

"As a workstream we are committed to improving, working and growing together with the industry's supply chain as we head into what is shaping up to be a very exciting time for offshore wind."



Richard Sandford
*Workstream
Sponsor
RWE Renewables*

"It is suppliers, with their ingenuity, dedication to cost reduction and resilience, who we rely on to ensure offshore wind projects come to life."



Julian Brown
*Workstream
Sponsor
Tekmar*

¹⁵ Find out more about the UK's clusters [here](#).

common goals. The two bodies are working together to assess which measures will be most valuable to take forward with the development of the UK supply chain in mind.

Looking ahead, the workstream aims to revisit a previous roadmap that considered how UK industrial growth can be achieved in tandem with the growth of fixed bottom and floating offshore wind. It is also working closely with a range of other workstreams including Pathways to Growth and People and Skills, recognising that a successful future supply chain relies greatly on a successful pipeline of skilled and diverse workers.



Helen Thomas

Workstream Lead, RWE Renewables



Mary Thorogood

Workstream Lead, Vestas



**OffshoreWind
IndustryCouncil**