

Offshore Wind Supply Chain – Charting a course to success

All-Energy: 11th May 2023

Crown Estate Scotland

Our roles



Investor

Investing in, for example, property development, to enhance value, as well as building external partnerships and supporting staff.



Enabler

Empowering others by supporting local plans and projects, providing access to property and helping address barriers to sector growth.



Asset Manager

Managing leases and agreements with tenants, as well as direct management of forestry.



Coordinator

Supporting other Scottish Crown Estate managers by, for example, coordinating spatial information.

Our purpose is to invest in property, natural resources, and people to generate lasting value for Scotland.

Scotland's offshore wind pipeline

37GW*

Scotland's offshore wind pipeline

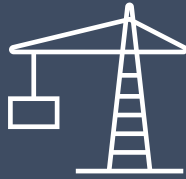
Almost 28GW of this is via ScotWind, and over 17GW of this floating offshore wind, plus the recently announced 5.4GW through INTOG



£28.8bn

ScotWind investment commitments

ScotWind's 20 projects are, on average, committed to £1bn investment into Scotland per GW of capacity built



23%

ScotWind's floating pipeline

ScotWind's floating projects make up 23% of the global pipeline of projects. INTOG could grow this to 29%. **

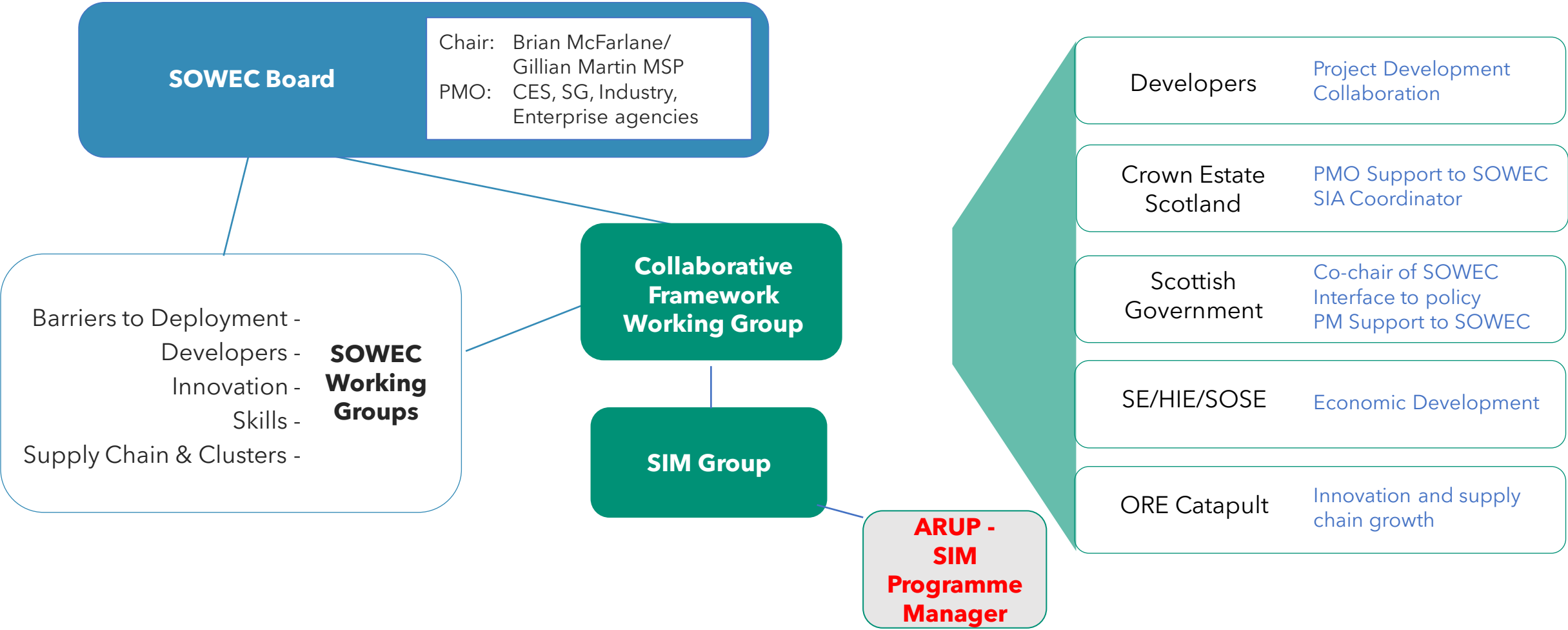


* Subject to planning and consenting decisions and finding a route to market
** Calculation on projects with a lease in place. Based on RenewableUK Energy Pulse Data, March 2023



Scotland's Collaborative Framework and Strategic Investment Model

Scotland's Strategic Investment Model has been co-developed by the Scottish Government and offshore wind industry



Scotland's Strategic Investment Model

The SIM has been developed to support structured collaboration between industry and Government & help foster increased confidence to unlock infrastructure investment

Understanding
infrastructure
needs



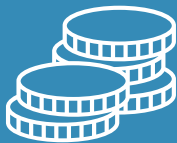
To deliver Scotland's offshore wind pipeline significant infrastructure upgrades are required. The SIM aims to build a shared view of need. By working across industry and the public sector, effort and potentially investment can be pooled and risks shared.

Stage 1:
Cross industry
assessment



The SIM is Stage 1 of a clearly defined process. Stage 1 involves an assessment of investment proposals taken forward by industry, the supply chain, enterprise agencies and other interested parties. The aim is to secure agreement on priorities and needs. Depending on the results of Stage 1, developers and stakeholders can choose to opt in to Stage 2.

Stage 2:
Building a
business case



Stage 2 takes forward the findings of the SIM. Groups of developers will work alongside the public sector, ports and other relevant supply chain members to develop a full commercial business proposition around individual investment proposals. Proposals will be taken forward separately on a case-by-case basis

Initial ports &
manufacturing
focus



In the first instance and as matter of priority, it will maintain a focus on ports and manufacturing infrastructure. Depending on experience of the SIM model, it could then be applied and/or adapted to help address other shared industry issues - e.g. skills.

Note:

participation in the SIM does not commit members to investing in certain projects or impose any financial obligation on members beyond annual administrative cost. SIM Ltd will not undertake direct investment in identified projects.

Outputs and Outcomes of the SIM

Completion of the SIM process is intended to:

- Enhance project credibility to the market
- Helps connect projects with investors and customers

Project prospectuses

- Consistent presentation for investors, developers + other stakeholders
- Reference for Government and industry as they make decisions about how best to deliver the infrastructure in a timely manner

Scotland's Strategic Investment Model

Application window open!

www.offshorewindscotland.org.uk/SOWEC/SIM

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