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End of the road for costs tunnel vision



Industrial golden age coming for offshore

The global offshore wind industry is on the brink of an "industrial golden age", RenewableUK chief executive Dan McGrail told GOW 2022 on Day 1. **p2**

DNA sampling future for site fish surveys

A trial to replace trawling with environmental DNA fish surveys at offshore wind sites has so far yielded positive results, delegates heard. **p3**

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Regulatory hill to climb for P2X market

The UK could be the first in the race to deliver large-scale power-to-X projects (P2X) supplied by offshore wind. **p6**

Day 2 official highlights **p7**

The offshore wind industry is at an "inflection point" that means a radical new way of doing business is needed to deliver a global expansion at the pace and scale needed to decarbonise power systems, GOW 2022 heard on Day 1.

SSE Renewables offshore wind director Paul Cooley told the audience during the opening panel session that a scrapping of competitive auctions in favour of a fixed price for offshore wind power is among the measures that need to be examined.

Auctions have worked to drive down costs but have also brought delay and uncertainty for developers and the supply chain, he said.

There are also question marks about a trade-off around the next generation of turbines. Increasing power ratings has worked to drive costs down but the supply chain is "not making any money" and is constantly chasing the next technology.

On top of that, the sector cannot deliver the required expansion without having an impact on the environment, Cooley added. "There are tough decisions to be made



PANEL DEBATE (left to right): R-UK chief Dan McGrail, SSE Renewables' Paul Cooley, Danielle Jarski of RWE Renewables, Clark MacFarlane of Siemens Gamesa UK, Jan Hagen of Vestas, and Diep Nguyen-van Houtte of IFC Global Infrastructure

Photo: RenewableUK

around the impact we make versus the benefits of decarbonisation," he told delegates.

Vestas north and central Europe chief technology officer Jan Hagen, speaking during the same panel discussion, said the supply chain is "bleeding" and he called for a shift in mindset from cost-focused to "value-focused".

Hagen questioned whether the onus should be on speed of innovation in the supply chain or developing a robustness and maturity. He said there is a balance between pace on the one hand and a sustainable business model on the other.

"If we are to deliver the

tremendous amount of capacity... we need to find that balance and get that right to achieve sustainability of all businesses."

Siemens Gamesa UK managing director Clark MacFarlane said it is vital people start addressing how to get money down through the value chain so everybody can innovate, adapt and invest.

He supported calls for auctions to be scrapped and to separate Contracts for Difference from competitive bidding, which could also support a more sustainable business model for the supply chain.

"We have to have a flexible economic model that allows everybody to survive," he said.

WEDNESDAY'S HIGHLIGHTS

Government perspective

Greg Hands MP will answer questions on the future of offshore wind and net zero strategy plans.

Charter 2&3, 10.00-10.30

Floating framework

ORE Catapult's Andrew Jamieson chairs a panel discussing how the industry can scale up the nascent technology to deliver capacity.

Charter 2&3, 11.00-12.15

Hydrogen future

Panelists debate the Power-to-X opportunities for offshore wind, from pilot projects to regulatory barriers to deployment.

Charter 1, 13.15-14.15

Skills gap

Charlie Guthrie of AIS Survivex explains why the UK skills export market for offshore wind is proving a headache for domestic recruiters.

Energy Transition Zone, 14.30-14.40

What next?

Join industry leaders as they reflect on GOW 2022 and share their key takeaways from this year's event.

Charter 2&3, 14.30-15.30

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Industrial golden age coming for offshore

The global offshore wind industry is on the brink of an “industrial golden age”, according to RenewableUK chief executive Dan McGrail.

There are “unprecedented opportunities” for companies in the sector given the scale of growth set to take place, the trade group boss told delegates at GOW 2022.

“Above all else I’m optimistic. The impact of the war (in Ukraine) has shown us how much governments around the world are seizing the opportunity of wind,” he said.

The level of pipeline growth, which has doubled in 12 months to more than 800GW globally, is “astonishing”. The figures come from R-UK’s *Energy Pulse* market intelligence report, released on Day 1.

McGrail also noted the challenges, however. Much has changed in recent months in the sector but the results of this year’s Contracts



OPPORTUNITIES AND CHALLENGES: RenewableUK chief executive Dan McGrail addressing delegates on Day 1

Photo: RenewableUK

for Difference auction have yet to be released, grid issues remain “unresolved” and “consenting (is) not fully aligned with ambition”.

The investment climate has soured with interest rate rises, spiralling commodity prices and a challenging sector-wide search for talent.

On a positive note, McGrail added: “We need to innovate and scale up like never before. Our message

to governments around the world is we are ready.”

■ The Covid pandemic showed the dynamism that exists in the offshore wind sector, GOW 2022 heard.

Siemens Gamesa UK boss Clark MacFarlane told delegates he was inspired by the way people kept going in the industry, delivering projects and building supply chain manufacturing capacity.

Key decarbonisation role

Offshore wind is “integral” to the future British energy system, according to COP26 President and former BEIS secretary Alok Sharma.

The sector will be a key part of delivering a fully decarbonised electricity system by 2035.

That is in part thanks to a clear economic case for the technology, which he said is now cheaper than coal

and gas is most major world economies.

Countries now understand the benefit of low-cost, home-grown renewables, “the price of which cannot be manipulated from afar”.

Sharma added climate and environmental security are “synonymous” with energy and national security. “Our long-term future does not lie with fossil fuels.”

Scalable, modular SOV solution

Energy services provider James Fisher & Sons and UK shipowner Graig Shipping have launched a new service operation vessel design boasting significantly lower fuel consumption and improved manoeuvrability compared to existing units, they claimed.

The launch of the Ulstein SX221 Diamond SOV is aimed at addressing supply chain issues threatening to stymie offshore wind progress with a scalable, modular solution that can be achieved through high volume series construction to meet

developer time and budgetary constraints, they said on Day 1 in Manchester.

“Building SOVs in series volumes achieves significant economies of scale and delivers a design that can be built in multiple yards simultaneously,” said James Fisher group business development director Jim Hey.

“Considering the anticipated market demand for SOVs in the UK and beyond by the end of the decade, this exciting new concept places the UK at the centre of enabling global offshore wind ambitions.”

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Sector collaboration route to success on 2030 target

Deeper co-operation across the UK offshore wind industry will be crucial to delivering the country's 50GW by 2030 installation goals, delegates were told

The sector and the country's energy transition are at a "crunch point" that can be viewed as both daunting and inspiring, but the key to moving forward is collaboration, said Matei Negrescu, head of North Sea area renewables development at Equinor.

BEIS renewable energy deployment director Sarah Redwood agreed that delivering on future targets "comes back to collaboration".

"To accelerate we all need to work together and collaborate. (But) with the targets, the ambition and creativity... let's make it happen," the energy department official said.

National Grid ESO head of strategy and regulation

Matthew Wright said the industry already has some degree of co-operation.

For example, the transmission company and the Crown Estate are working together to ensure potential new leasing areas are in line with where grid connections are likely to be available.

"We are seeing it (collaboration) but it needs to continue. We are all on the same side and want the same thing," he added.

Orsted head of UK region Duncan Clark said an immediate challenge is how to kick-start manufacturing.

"We need to find a clever way as developers to give hard commitments to the supply chain much earlier than (we) do right now.

"The challenge for this decade is how do you scale up and how do you deliver. How do you kick start that?"

"It's simple: frontloading the commitment from the customer to the supplier."

DNA sampling future for site fish surveys

A trial to replace trawling with environmental DNA fish surveys at offshore wind sites has so far yielded positive results, delegates heard.

Natural Power senior environmental consultant Stephanie Dickens and NatureMetrics technical manager Dr Edward Wort told delegates DNA sampling can give a more informed picture of species biodiversity while reducing development costs and impacts.

Dickens cited the difficulty in sourcing suitable vessels as a disadvantage to trawling. "Commercial fishing gear is also highly selective, so a number of species in the area will never be captured in the data," she said.

The 18-month project is being 50% funded by an Offshore Wind Growth Partnership innovation grant. EDF Renewables is making a financial contribution and has

granted access to its Blyth offshore demonstrator site for the work to take place.

"We've only (just) got the data back for the winter sampling... We picked up 48 species, so a lot more than the trawl data," Dr Wort explained.

The study uncovered the first record of European eels in the test area as well as several new rockling and goby species, he added.

The team will continue to collect data this year and produce a results paper alongside methodology recommendations for regulators.

Also speaking from the Energy Transition Zone podium, ITPenergised technical director Emanuele Stella said there is a need for more integration between environmental impact assessment consultancies and design teams from the

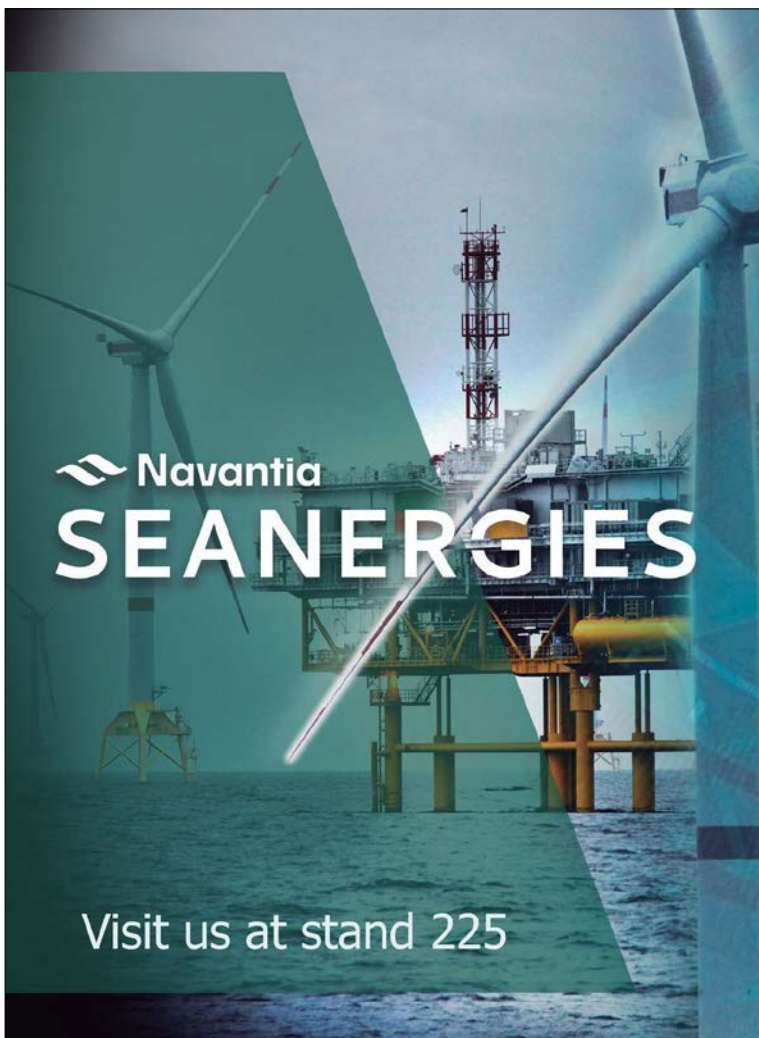
inception of the offshore wind development process.

Greater cohesion would "avoid waste of programme time and having to submit a further consent application", he told the conference.

■ More work is needed to investigate the impact of floating wind projects on aviation safety, ORE Catapult project engineer Luke Eatough told delegates at the Energy Transition Zone.

Discussing the outcome of the Floating Offshore Wind Centre of Excellence's environmental roadmap, published yesterday, Eatough said there are "insecurities" around the extent to which floaters could influence radio signatures.

The roadmap also identified challenges to maritime navigational planning posed by installing arrays in deeper waters farther offshore.



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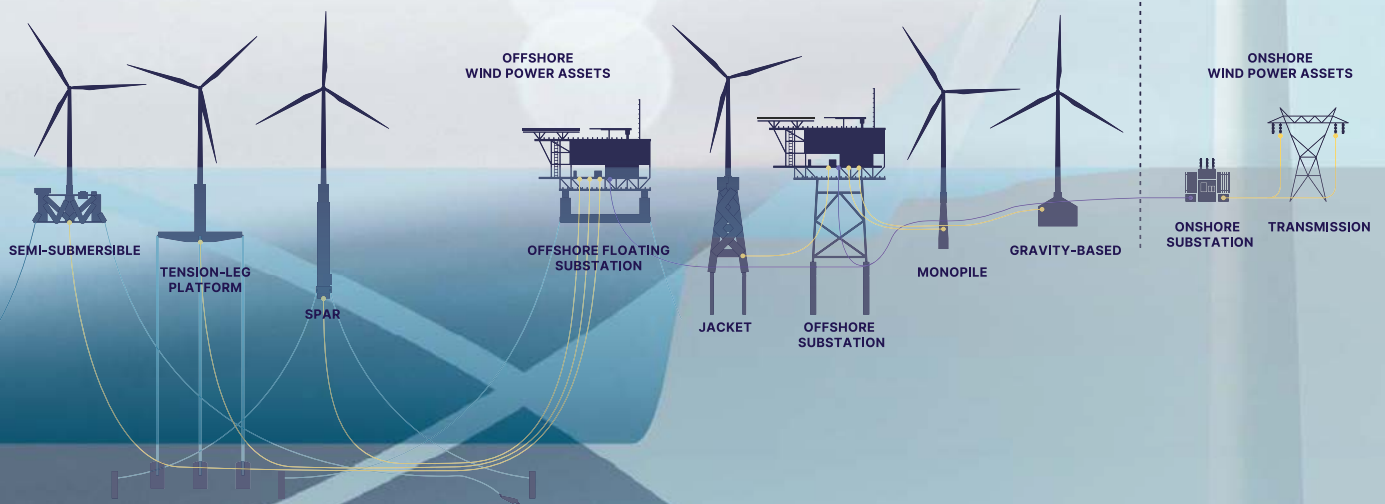
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THE INTERVIEW

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SSE Renewables has an 8GW pipeline in the UK and Ireland and is on the march across Europe, the US and Japan, says director of offshore development **Maria Ryan** (left)

Q You were recently appointed director of offshore development at SSE Renewables. What will the role entail?

A Delivery of our pipeline, pure and simple. We're already building more offshore wind than any other company in the world through delivery of Dogger Bank and Seagreen, but we can't stand still. I'm really excited about our team delivering our 8GW of secured offshore pipeline in the UK and Ireland. In Scotland, our focus will be on delivering our 4.1GW super-project at Berwick Bank alongside our winning 2.6GW floating ScotWind project with Marubeni and CIP, and the 504MW North Falls project with RWE, while in Ireland we're making huge progress on our flagship 800MW phase 2 development of Arklow Bank and look forward to the first O-RESS opening later this year. We are also focused on continuing to expand our pipeline and are progressing a number of early stage prospects.

Q At over 8GW, SSE has one of the largest offshore wind pipelines in the UK and Ireland. What are the main challenges to delivering this capacity on time and on budget?

A There's immense ambition in our sector but we can't underestimate the challenges to delivery. Top of these is consenting timelines. We have to tackle environmental assessment and derogation issues at a strategic plan level so we can accelerate consenting.

Grid is also set to be a major constraint so we need long-term, co-ordinated plans but in doing so we can't risk creating delays to 'in-flight' projects. Market design and leasing need to support targets so, for instance, there should be no arbitrary cap in AR4 and O-RESS if projects can meet a competitive strike price. And of course we all know the challenge the sector is facing from supply chain constraints.

Q What could governments be doing to accelerate development and help meet your objectives?

A Well, governments can introduce reforms needed to accelerate consenting processes and tackle environmental issues. They can also ensure we have a CfD and leasing structure that supports ambition. And governments can play a crucial role in ensuring whole consenting systems, whether in the UK or Ireland, are properly resourced. We need people, people, people in consenting authorities as well as key consultees if we're going to keep pace with delivery targets.

Q Grid constraints and local opposition to onshore connections are a growing concern. What is SSE doing to overcome these obstacles?

A Early engagement with communities is vital and it's something at SSE Renewables we take very seriously. As an industry we've developed extensive processes to address the challenge of delivering

onshore wind in rural communities. We now need to acknowledge there are coastal communities with whom we also need to meaningfully engage so they see and understand the benefits that offshore wind can bring to their areas.

Q SSE has teamed up with Marubeni and Copenhagen Infrastructure Partners to develop a 2.6GW floating project off Scotland. How important is this technology to SSE's plans over the next decade?

A It's hugely important. Through (the project's) delivery we will gain a unique insight and understanding into floating technology as it scales up for deployment elsewhere in the UK and in other markets.

Q You are exploring new development opportunities elsewhere in Europe including Poland and Spain. How is SSE preparing for these leasing rounds and where is the company most excited to go next?


A Bringing our capabilities in development, construction and operation to international markets is really exciting. We're obviously targeting a number in Europe as well as in Japan where we've established SSE Pacifico but there's real excitement about North America and Asia Pacific, too. It's a fantastic time to be in this sector, and indeed at SSE Renewables. ■



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Regulatory hill to climb for P2X

The UK could be the first in the race to deliver large-scale power-to-X projects (P2X) supplied by offshore wind, according to Aker Offshore Wind UK managing director Sian Lloyd Rees.

While the country may not produce the cheapest renewable energy or green hydrogen, globally it is “very forward leaning” in terms of policy and fiscal regimes, such as Contracts for Difference for offshore wind plus support mechanisms introduced earlier this year for low carbon hydrogen projects.

These will help to provide scale “ahead of other regions”, she told reNEWS ahead of the GOW conference.

“There is an opportunity to bring online large, commercial-scale offshore wind to green hydrogen projects before 2030, especially if offshore wind consenting times are reduced,” said Lloyd Rees, adding that a “confluence of factors” — namely electricity

But policy environment makes UK likely front-runner in development of offshore wind-backed green hydrogen market, writes **Sara Verbruggen**

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grid constraints, hard-to-abate sectors that cannot be addressed via electrification, plus grid stability issues — are helping to create demand for P2X projects in the UK.

Mainstream Renewable Power senior offshore development manager Anna Dunbar said creating a “sustainable supply chain that can deliver at scale” requires a regulatory framework to enable a “rolling pipeline” of projects to be built.

Incentives for industry are needed to facilitate a switch to hydrogen that is also green while regulators must mandate the use of renewables for hydrogen generation where zero carbon

gas is “explicitly defined and supported” rather than a low carbon version, she added.

“Ultimately, more renewable power generation is needed and the regulatory barriers to deployment of offshore wind are consequently the same regulatory barriers to green hydrogen projects.”

Dunbar said the hurdles are complex due to the number of industries involved in the green hydrogen transition that “sometimes have conflicting priorities”.

One example is the ‘additionality’ concept, which refers to hydrogen projects bringing dedicated new renewable capacity online

rather than using power from operational generators.

“The EU is proposing to include this requirement while other countries, like the UK and India, are not.

“Opponents to additionality requirements argue they are administratively burdensome and a deterrent to the build-out of green hydrogen projects. But from a net zero perspective, it is inefficient to divert existing renewable power away from the electricity network, which still requires decarbonisation, to produce hydrogen.”

Joergen Scheel, who is head of demonstration and piloting at Siemens Gamesa’s P2X offshore programme, said regulatory challenges ahead include having clear market frameworks for ownership and use of pipelines for transporting green hydrogen produced by offshore wind farms. “Because the scale advantages of transporting

large quantities of hydrogen are substantial, it is worth thinking of tying multiple sites into the layout of future pipelines,” Scheel added.

European Hydrogen Backbone reports in recent years have begun to address this, he said, but further acceleration is required to be ready for a large-scale build-out in the 2030s.

He added that to start the transition from offshore wind supplying an integrated energy system to delivering P2X, partnerships across the value chain will be crucial to ensure a level of risk/reward sharing between stakeholders.

Dunbar said “carefully defined” partnerships between off-takers and generators are key to long-term project viability and the ability to finance a development from day one. ■

How can the offshore wind sector seize the power-to-X opportunity? **Charter 1, Day 2, 13.15-14.15**



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Day 2 official highlights

A7: The pathway to decarbonisation

Panel looking at the business case and benefits of collaborating with the O&G sector in accelerating the UK's decarbonisation.

Charter 2&3, 9.00-10.00

A8: In conversation with Rt Hon Greg Hands MP

Opportunity for industry to ask their top questions concerning the future of the offshore wind and how the Net Zero Strategy will deliver.

Charter 2&3, 10.00-10.30

A9: Floating wind: Building a global industry

Panel discussing industry needs to permit, design and deliver large scale floating wind.

Charter 2&3, 11.00-12.15

A10: Go global: developing offshore wind in India

Hear an update on recent government announcements and offshore wind tenders and what data is required to put together a bid.

Charter 2&3, 13.15-14.15

A11: Offshore wind future leaders: what next?

Hear from the industry's future leaders and RUK shadow board as they reflect on the discussions taken place over the two days.

Charter 2&3, 14.30-15.30

Supply Chain Studio

S3: Supply Chain Surgery: What business support is available to you?

Charter 4, 10.30-12.00

ScottishPower Renewables Energy Transition Zone

ETZ23: Biodiversity and Offshore Wind — Developing in

harmony with nature

Exhibition Halls, 10.45-11.05

ETZ39: Circular economy in offshore wind

Exhibition halls, 11.10-11.40

Vestas Innovation Theatre

IT33: Product & Technology Innovations enabling profitable floating wind

Exhibition Hall, 12.15-13.15

Siemens Gamesa Partnerships Hub

PH22: How can academia support the growth of the offshore wind industry?

Panel discussion, 11.15-11.55

PH25: UK Export Finance + EKf: Financing Taiwan's largest offshore wind farm

13.10-13.30

Day 2 side events

The Offshore Energy Alliance Networking Breakfast

Pre-registration essential

Charter 4, 08.00-09.15

Joule Challenge Industry Workshop

Sponsored by ORE Catapult, pre-registration

essential

Charter 1, 10.00-12.00

Students Programme

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Charter 4, 12.15 - 15.30

Dogger Bank Operations Careers Fair

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Stand 294, all-day

Ocean Winds Juice Bar

Stand 237, 10.00-16.00

Correll Cupcakes & Coffee

Stand 7, 10.30-11.30

Networking Tours

GE Grid Factory Stafford, Thursday, 23 June

Enquiries at RenewableUK stand 290

Siemens Blade Factory

Hull, Thursday 23, June

Enquiries at RenewableUK stand 290

Thank you to our event partners



Publisher

Renews Limited

PO Box 808,
Winchester, Hampshire,
SO23 3TS, UK

ISSN 1478-307X

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