



Celtic Sea Floating Offshore Wind Summit 2022

Executive Summary

The “Celtic Sea Floating Offshore Wind (FLOW) Summit”¹ was convened on 27th April 2022. This interactive in-person event, brought together over 80 individuals from 55 organisations including almost all the developers active in the region and the major Celtic Sea ports in the Celtic Sea

With 98% of the summit attendees agreeing that they would wish to see a sustainable regional industry built for the UK Celtic Sea capable of delivering industrial scale floating offshore wind (as part of the UK’s Energy Security Strategy and Net Zero targets), the aim was to seek broad consensus on how to achieve this. Four key challenges were addressed:

- Ports and Infrastructure
- Grid
- Workforce
- Spatial Planning

Ports and Infrastructure

Richard Ballantyne, Chief Executive of the British Ports Association, presented the work of the Celtic Sea Ports working group made up of representatives of the industrial ports in the region. Their position has been set out in a paper which sets out early collaborative thinking on how the region’s ports and infrastructure might be made ready for FLOW development in coming years. Summary points were highlighted:

- No port, on its own, is ready to support fully industrialised FLOW in the Celtic Sea
- The need for focussed, quantified, front-loaded investment to accelerate collective improvement in port infrastructure across the Celtic Sea region. Over eighty percent summit attendees agreed that more than £320m of investment is required to achieve this.



Figure 1 - Ports Working Group

¹ Delivered by the Celtic Sea Power led, and part ERDF funded, Cornwall FLOW Accelerator project on behalf of the Celtic Sea Cluster



HM Government

To unlock investment, it will be crucial to establish:

- That there is an agreed long-term ambition in the Celtic Sea over the next 50 years
- A “steady drumbeat” of FLOW projects which sustain, but not outstrip, expanding port activity.
- Who the customer will be? Time from lease to CfD to contracting creates uncertainty in determining port infrastructure investment decisions.
- That there is an ability to continue to service existing customers and respond to new business from elsewhere.
- Ports, yards, infrastructure operators, FLOW developers, key supply chain players and government need to work hand-in-glove to ensure this opportunity is realised.

After discussion, the vast majority of summit attendees agreed with the ports working group direction of travel.

Grid

The discussion around the strategic challenges of future Celtic Sea offshore transmission and the importance of the Offshore Transmission Network Review was augmented by a presentation on the benefits of Multi-connector Offshore Substations (MOSS) as a mechanism for reducing environmental impact (through reduction of cable routes and landing points), consenting time and costs, particularly for early projects. It was noted that such a MOSS was under development in the Pembrokeshire Demonstration Zone.

Key points of discussion covered impact of delays on projects, capacity issues in Pembroke, funding beyond the public sector and solutions beyond early demonstration projects. However, there was a majority view that a collective approach to grid is essential to the UK Celtic Sea.

Workforce

Led by members of the Celtic Sea Cluster workforce working group, the summit considered the challenges, and possible solutions, to developing a workforce capable of delivering a sustainable FLOW industrial eco-system in the Celtic Sea. This covered the need to properly articulate the demand before establishing an approach to supply. Drawing on the experience from the Defence Sector, the room heard about the need for strategy, adaptive planning, and authoritative data. Noting that the gender balance of the room was predominantly male, the attendees discussed the need to appeal to the widest range of young people possible, and ensure we have a diversity of thoughts, experiences and backgrounds in a future workforce that will need to evolve the industry.

The majority of the attendees agreed that they would like to see the development of a regional FLOW academy to take forward Workforce solutions. As an initial workstream, there was overwhelming support for practical guidance on encouraging diversity in workforces.

Spatial Planning

Led by Natural England, The Crown Estate and Celtic Sea Power, the summit recognised the challenges presented by consenting and discussed approaches to streamlining current processes. There was discussion about the need for actionable data to obtain a clear understanding of environmental risks and opportunities ahead of offshore wind developments. Presentations were given on enabling survey campaigns in process, planning and concept which could meet this need and underpin a strategic zonal planning approach. The key



HM Government

message was that a collaborative approach to zonal planning, data sharing and coordinating survey campaigns is essential with 100% of the attendees agreeing that it is also achievable.



Figure 2 - Neil Farrington, Celtic Sea Power

Summary

With almost all the key active players in Celtic Sea FLOW in the same room, the summit did agree that;

- We wish to see a sustainable regional industry built for the UK Celtic Sea,
- Front loaded investment to accelerate collective improvement in Celtic Sea port infrastructure is essential,
- A steady “drumbeat” of FLOW projects is needed to underpin the long-term ambition in the Celtic Sea over the next 50 years,
- A collaborative and co-ordinated approach across ports, infrastructure, grid, workforce planning and zonal planning is not only essential to build a sustainable regional industry, but also achievable.

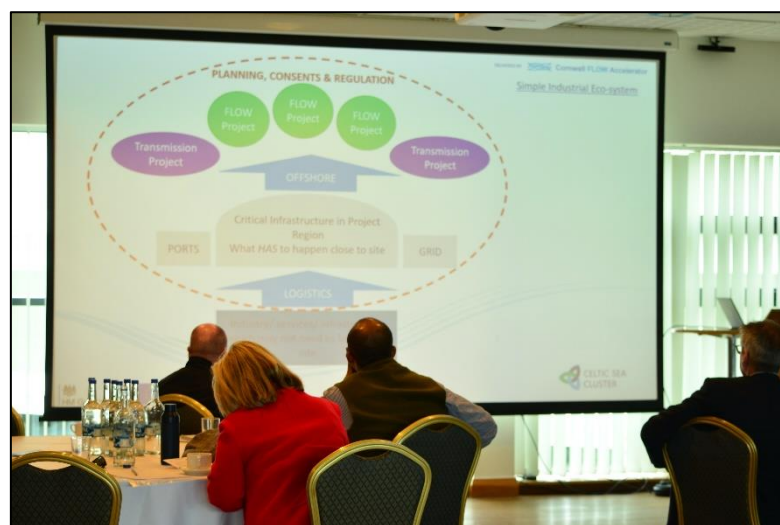


Figure 3 - Considering Industrial Eco-systems