

Thistle Wind Partners

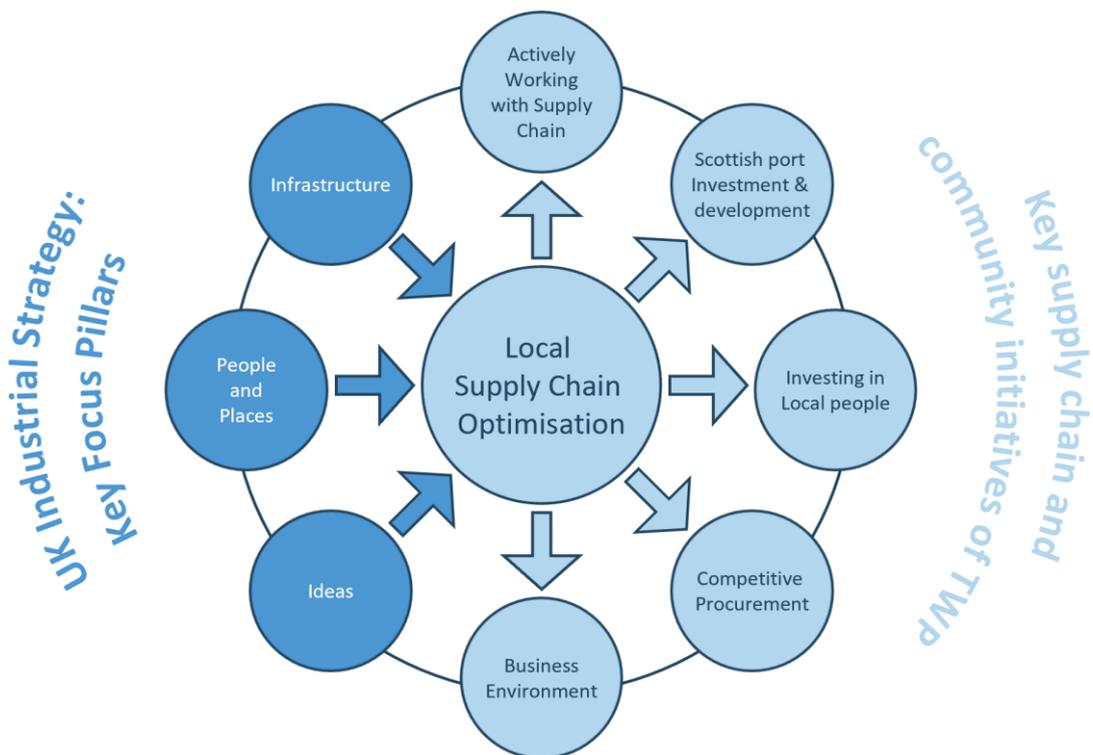
Cluaran Ear-Thuath

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# Application ID: AP30DCWScotWind4

## Part A13: Supply Chain Development Statement

### Outlook



## Part 3 - SCDS Outlook

### A BRIEF INTRODUCTION TO THE DEVELOPER

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Thistle Wind Partners (TWP) comprises strong, experienced players with a **history of successfully delivering projects**.

#### DEME Concessions NV

DEME Concessions (DC) brings together all investments of the DEME Group in the fields of offshore wind and other renewables, infrastructure, and marine resources. DC provides equity, project finance structuring and specific technical knowledge with the support of the various activity lines of the DEME Group. DC has experience in developing over 1.5 GW of offshore wind projects in Europe with increasing focus on the UK.

#### Qair Marine

Qair is an Independent Power Producer, operating 500 MW of power generation assets exclusively from renewable sources. Globally, the group is in the construction and financing phase for 930 MW and is developing 3GW of assets for future deployment in the heart of the 16 territories in which it operates.

#### Aspiravi NV

Aspiravi develops, implements, and operates renewable energy projects with a total installed capacity of 1,547 MW. These projects primarily pertain to wind energy, but it owns and operates biomass installations, biogas engines and some smaller scale hydro-electric installations.

### KEY POINTS OF THE CLUARAN EAR-THUATH SCDS

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**TWP are committed to proactively develop the local supply chain, progressing the Cluaran Ear-Thuath project in a way which will support the sustainability of offshore wind development projects and the local content to meet the UK's Industrial Strategy target of 60% by 2030.**

#### Expenditure calculation methodology

Due to the commercial sensitivity at this stage, the presented **expenditures were prepared based on the CES commissioned study 'Crown Estate - Guide to offshore wind farm' (2019)**. The benchmark costs for each task were prorated from the 1 GW study case.

Drawing upon the internal expertise of TWP, with additional support through engagement with key operating entities in the offshore wind industry in Scotland and the wider UK, geographical distributions are presented in 'commitment' expenditure based on the current local supply chain capabilities

**The 'ambition' figures represent the 60% target of UK local content for the project to set a clear goal.** Once an Agreement for Lease Option agreement is awarded to the project, **TWP will prepare a more detailed view on potential project expenditure, working closely with the supply chain, and UK and Scottish governments (SCDS Update).**

#### Key challenges

Delivering a successful offshore wind project requires a robust, competitive, and reliable supply chain. Without a clear, strategic roadmap with policy and support, the supply chain of Scotland and the wider UK are not ready in terms of port infrastructure, manufacturing, offshore construction, and cost competitiveness to target the large-scale offshore wind plans in Scotland.

#### Key opportunities

Scotland and the wider UK has the knowledge and competencies. The rapid expansion of offshore wind in Europe will challenge the existing supply chain. This provides the opportunity to take advantage of this situation with government and wider stakeholder collaboration. For Scotland, this is specifically the case for emerging floating wind technology which is moving to the forefront of the global renewables transition story.

## Key requirements

Driven by Scottish and UK government policy, following engagement with the developers and the supply chain, strategic directives, incentives, and investments need to identify and address the true needs of the local supply chain.

### TWP's AMBITION TO MAXIMISE LOCAL CONTENT

TWP are committed to successfully delivering the Cluaran Ear-Thuath project offshore wind project and will maximise local content where practicable, actively engaging with the supply chain. A robust, cost competitive local supply chain needs to be ensured not only for the project but for the wider, large scale build-out ambitions of Scotland.

Supply chain engagement will be a key part of the project delivery programme with TWP recognising the importance of clearly communication the requirements of the supply chain and the necessary support of Scottish and UK government.

The TWP partners have a strong track record of local engagement not only with the supply chain but also investment in the necessary port infrastructure to catalyse local content for our development projects and the wider industry.

### KEY INITIATIVES TO BE EXPLORED FOR CLUARAN EAR-THUATH PROJECT

Key initiatives identified at this early stage of assessing the local supply chain:

1. **TWP has already begun engaging with Scottish ports to overcome the vital infrastructure and supply chain constraints** for project to de-risk its construction and O&M as well as support the wider offshore wind project pipeline. TWP will explore opportunities to repeat our success stories in terms of creating a service supply chain centre for the project offshore wind project whilst Scotland's position for the full offshore wind build-out.
2. **TWP will identify and remove barriers to entry for new supply chain companies. TWP**

**will open the supplier chain to new entrants and/or SMEs including exploring the standardisation of the contracting process. Encourage competitive procurement processes.**

**TWP will launch an online platform to help the Scottish supply chain find and bid for work on the offshore wind project.** The platform will act as a central hub, advertising all current and future opportunities for sub-contractors and suppliers and allowing them to engage with the Cluaran Ear-Thuath team.

3. **TWP will improve awareness of the commercial opportunities** for the project by setting up a holding 'meet the buyer' events, actively engaging with the supply chain and any cluster groups (e.g. Deepwind, Forth and Tay, etc.) to understand the capabilities for the project and work with Scottish and UK governments, particularly engaging with local MPs/MSPs, to identify necessary support to ensure the local content is ready.
4. **TWP strongly believes in investing in local people** to ensure we have the necessarily skilled and diverse workforce. In parallel, we will create local opportunities. For example, a training academy will be established to ensure local job creation. Key roles within the project delivery team will be undertaken by UK staff.
5. **TWP considers the project technology neutral and as such will openly explore local supply chain development** from large, global players to those in Scotland, locally to the project to optimise the project's supply chain.

Total word count of Outlook: 995

Table 1: Phase 1 - 500 MW floating TLP foundations (Commitments)

	Scotland	rUK	EU	rWorld
Development	£ 30 M	£ 17 M	£ 13 M	£ 0 M
Fabrication	£ 200 M	£ 56 M	£ 424 M	£ 120 M
Installation	£ 91 M	£ 0 M	£ 195 M	£ 39 M
Operations	£ 180 M	£ 0 M	£ 45 M	£ 0 M

Table 2: Phase 2 - 500 MW floating TLP foundations (Commitments)

	Scotland	rUK	EU	rWorld
Development	£ 30 M	£ 17 M	£ 13 M	£ 0 M
Fabrication	£ 200 M	£56 M	£ 424 M	£ 120 M
Installation	£ 91 M	£ 0 M	£ 195 M	£ 39 M
Operations	£ 180 M	£ 0 M	£45 M	£ 0 M

Table 3: Phase 1 - 500 MW floating TLP foundations (Ambitions)

	Scotland	rUK	EU	rWorld
Development	£ 30 M	£ 17 M	£ 13 M	£ 0 M
Fabrication	£ 392 M	£ 48 M	£ 272 M	£ 88 M
Installation	£ 91 M	£ 0 M	£ 195 M	£ 39 M
Operations	£ 180 M	£ 22.5 M	£ 22.5 M	£ 0 M

Table 4: Phase 2 - 500 MW floating TLP foundations (Ambitions)

	Scotland	rUK	EU	rWorld
Development	£ 30 M	£ 17 M	£ 13 M	£ 0 M
Fabrication	£ 392 M	£48 M	£ 272 M	£ 88 M
Installation	£ 91 M	£ 0 M	£ 195 M	£ 39 M
Operations	£ 180 M	£ 22.5 M	£22.5 M	£ 0 M