

## DOCUMENTS

### 1. Briefing - Panel discussion and Q&A - Mr McKee - FOWT 22 - 16 May 2022

#### **12 May: Norway announces new target of 30GW of offshore wind by 2040**

##### ***Lines to take:***

- We welcome this ambitious new target from the Norwegian Government. We have similarities in our well-developed Oil and Gas sectors, and we recognise there is an opportunity for sharing expertise across our governments, working collaboratively to secure supply chain benefits for floating wind, and to deliver a Just Transition.
- Scotland has high ambitions to develop capacity in our floating wind supply chain to supply other markets, including Norway.

#### **28 Mar: The EU Launches legal challenge at WTO against UK Contracts for Difference Supply Chain Plan policy.**

##### ***Lines to take:***

- We are aware that the European Commission has launched a legal challenge at the WTO against the UK Government on a question in the Supply Chain Questionnaire that developers are asked to fill out before applying for a Contract for Difference.
- We have been assured by the UK Government that this process complies with all laws and regulations, and that current and future CfD allocation rounds will continue uninterrupted.
- The Supply Chain Development Statement process for ScotWind and INTOG has been carefully designed by Crown Estate Scotland in respect to all applicable legal requirements, such as competition law and the EU-UK Trade and Cooperation Agreement.
- Lease applications for ScotWind were managed and assessed by Crown Estate Scotland, and lease awards were not contingent on the content of the Supply Chain Development Statements submitted as part of that process.

*Note:* [REDACTED]

## SCOTWIND: DELIVERY

### **The conclusion of the ScotWind offshore wind leasing auction is a tremendous vote of confidence in Scotland.**

- The level of ambition shown by the market recognises the seriousness of Scotland's commitment to achieving our net zero targets and economic growth.
- I am pleased to say that all 17 successful ScotWind applicants have option agreements in place, which means that these projects can now move into the development stage. This marks an important milestone in the development of ScotWind.
- A clearing process is currently in progress for the NE1 site off the coast of Shetland, and we expect option agreements for that site to be in place later this year.
- Of course, this is just the start of a journey which will take some years before developments are constructed.
- As you all know, large and complex projects such as these take a number of years to come to fruition, so we would expect to see ScotWind projects being built from 2028 onwards. This accounts for the time successful bidders need to work through development and planning, and secure consents and licences from government.

- The announcement of these awards heralds an exciting era of economic development underpinned by balanced and effective regulation at a scale seldom seen before in Scotland's history.
- Our focus now switches to supply chain opportunities, and to the consenting regime - ensuring that this works as effectively as possible as we process applications from developers and determine what can be consented in light of environmental and other impacts.
- ScotWind was designed as a leasing round focused on quality and deliverability of bids rather than determining them solely on price through an open auction. We have every reason to be optimistic about what ScotWind can deliver for our energy transition, our green economic recovery, and our supply chain.

## **SCOTWIND: FLOATING FOCUS**

### **ScotWind is the world's largest commercial round for floating offshore wind and puts Scotland at the forefront of offshore wind development globally.**

- Scotland is already a world leader in the deployment of floating offshore wind technologies, and we currently have the largest installed capacity of floating offshore wind in the world.
- We have the world's first, and the world's largest operating commercial floating wind farm in Scotland, and ScotWind now breaks new ground in putting large-scale floating wind technology on the map at GW scale.
- 11 out of 17 of the successful ScotWind projects plan to use floating technology, with 15 GW of total capacity, which accounts for roughly 60% of ScotWind's potential generating capacity.
- Results of the clearing process for ScotWind site NE1, and the Innovation and Targeted Oil and Gas Decarbonisation (INTOG) leasing round will further add to the pipeline of floating wind projects in Scottish territorial waters.
- The INTOG leasing round provides an opportunity for both innovation projects up to a total of 500MW to test new technology or solutions in Scottish waters, and a more significant scale of projects targeting 4GW that will specifically deliver green energy to oil and gas installations (the total number 5.7GW accounts for estimated levels of attrition).
- This pipeline of projects presents a tremendous opportunity to develop Scottish supply chain for floating wind.
- The expertise gained through over 40 years of experience gained from oil and gas sector operations in Scottish waters, means this sector, and its supply chain, will be a differentiator for Scotland in developing floating offshore wind technologies, in line with our commitment to a Just Transition.
- On 28 February 2022, the First Minister launched ORE Catapult and ETZ's £9m world-leading National Floating Wind Innovation Centre in Aberdeen. The centre will be a catalyst for high-value manufacturing, research, development and the deployment of new energy technologies. This marks a major step in our collective efforts to capitalise on the huge opportunity that floating offshore wind presents.

## **SCOTWIND: COMPARISON WITH ENGLISH/OTHER LEASING ROUNDS:**

### **The process undertaken has produced a leasing round focused on quality and deliverability of bids, and the long term prize of supply chain investment which promises to transform the Scottish economy over decades and to provide the energy transition required to achieve Net Zero by 2045.**

- Including an evidence-based cap on the amount bidders could offer per square kilometre ensured bidders would have confidence to meet the further investment necessary to deliver on each project and realise the associated supply chain benefits.

## **Comparing ScotWind with the option fees raised in both UK waters and further afield is not a like for like comparison.**

- Projects in Scottish waters are at a competitive disadvantage (compared to projects further south) as a result of more challenging conditions and transmission costs.
- Scottish sites are often further out to sea, in deeper waters and may require the deployment of floating technology, which is still untried at large generating volumes and therefore likely to require more investment to construct compared to other projects.
- In addition, developments in Scottish waters suffer from higher grid connection costs, making them relatively expensive to develop compared to projects in the south of England.

## **SUPPLY CHAIN / SCDS**

### **We remain fully committed to using every lever within our devolved competence to support and grow the offshore wind supply chain here in Scotland.**

- Applicants to the ScotWind leasing round were required to submit a **Supply Chain Development Statement (SCDS)** that sets out the level and location of supply chain impact throughout the lifetime of projects across four phases (development, manufacturing, installation, operations and maintenance).
- We believe that these Supply Chain Development Statements signify how seriously the Scottish Government takes this issue and, more importantly, will provide certainty of a pipeline of projects to suppliers across Scotland.
- These commitments amount to billions of pounds of investment to the Scottish supply chain and economy. Initial projections show **an average spend of £1.5bn in Scotland per project** across the 17 ScotWind projects.

### **While ScotWind lease awards were not contingent on the content of the Development Statements, checks and balances are in place:**

- Both the SCDS and Contracted Position Statement (CPS) set out expenditure across four phases of the project; development, manufacture, installation, and operations and maintenance and across four geographical areas; Scotland, UK, EU, and Elsewhere.
- Crown Estate Scotland will assess any variance between the final SCDS and the CPS and decide on the acceptance of the CPS, similar to assessing acceptance of an updated SCDS.
- **Failure by developers to deliver on their commitments can trigger remedies ranging from financial penalties to an inability to progress to a seabed lease.**
- This has produced a leasing round focused on quality and deliverability of bids and the long term prize of supply chain investment that promises to transform the Scottish economy over decades, rather than determining them solely on up-front price through an open auction.
- These statements are not only an indication of what Scotland can achieve, they are our expectation of what the winners will deliver for Scotland.
- This is in addition to our commitment to invest £75m in the National Manufacturing Institute Scotland and delivering targeted actions through a manufacturing recovery plan to support the sector as it adjusts to the new economic context.

## **SOWEC COLLABORATIVE FRAMEWORK**

### **We are working to realise our ambitions for the floating wind supply chain in Scotland through The Scottish Offshore Wind Energy Council. Our recently announced Collaborative Framework will help forge effective partnerships to deliver on the supply chain potential.**

- As Co-Chair of The Scottish Offshore Wind Energy Council (SOWEC), I am leading on work to implement the five key recommendations in the Strategic Infrastructure Assessment (SIA), starting with the creation of a Scottish Floating Offshore Wind Port Cluster.
- I am pleased to share that we published the Offshore Wind Collaborative Framework Charter last week. 24 developers have signed up to the Charter, which includes all active developers in Scotland and encompasses all 17 ScotWind projects.
- The Charter builds on the 2021 Strategic Investment Assessment (SIA) recommendations adopted by the Scottish Offshore Wind Energy Council (SOWEC), and is a clear way to support and enable developers' collective supply chain commitments. The Charter will help forge effective partnerships to deliver on the potential that offshore wind presents in the coming years.

## CONTRACTS FOR DIFFERENCE (CFD)

- The UK Government's Contracts for Difference (CfD) subsidy regime remains the key route to market for offshore wind projects across the UK, including in Scotland, though some developers are opting for other routes such as Power Purchase Agreements (PPAs) and Merchant financing.
- Throughout 2020, a consultation took place on changes to the CfD and adjoining Supply Chain Plans process. Ministers submitted a response to both consultations, and we made the case that failure to comply with Supply Chain Plans should result in repercussions, up to and including the termination of a CfD.
- This consultation resulted in a number of changes to the Supply Chain Plans process, and we welcome the additional conditionality required by the UK Government for supply chain commitments in Contracts for Difference (CfD) rounds.
- We also welcome the announcement that floating offshore wind projects will be placed into a separate £24 million "pot" with its own strike price for the current Allocation Round 4.
- The ScotWind leasing round was a separate process from the CfD but did include a mechanism for supply chain commitments. Applicants to the ScotWind leasing round were required to submit a **Supply Chain Development Statement (SCDS)** that sets out the level and location of supply chain impact throughout the lifetime of projects.

## TARGETS

### **Whilst we haven't set a specific target for floating offshore wind, we expect it to play a significant role in supporting our transition to net zero by 2045.**

- Our Offshore Wind Policy Statement sets an ambition to achieve 8-11 GW of offshore wind in Scotland by 2030. This recognises that deployment must increase significantly if we are to meet our climate change targets
- The combined ambition of ScotWind projects is 25GW of generating capacity, which if approved, would deliver far in excess of our current planning assumption of 10GW of offshore wind.
- We are seeking to maximise the opportunities from ScotWind, for energy, the environment, the economy and our supply chain, albeit in a way that aligns with the marine planning framework.
- We will outline our vision for Scotland's energy system when we publish our refreshed Energy Strategy and Just Transition Plan later this year, which will take a whole systems approach and factor in key policy developments in renewable energy sources.

### **We support the renewable energy aspirations of the recently published British Energy Security Strategy, including the target of 50GW of offshore wind, including 5GW of floating offshore wind by 2030. However, this raises several important issues for Scotland.**

- Scotland has some of the most extensive renewable generation capabilities in Europe but investments are held back by unfair network charges, and a lack of anticipatory investment in grid capacity. The Strategy fails to set out the necessary action to ensure equitable opportunities across the UK.

## FISHERIES

### **Engagement with fisheries stakeholders on Offshore Wind Energy developments is a vital component to our marine planning, licensing and consenting work.**

- The extensive engagement undertaken with fishers during the ScotWind Sectoral Marine Plan, which led to changes in a number of plan areas and has been positively received, will continue.
- The fishing sector will be invited to the INTOG steering group and their input will help shape the final plan.
- Fishers are also fully involved in the Iterative Plan Review process which is built into the Sectoral Marine Plan to enable any review and updating of its assumptions in light of new evidence and information.
- Treating affected fishers fairly as we work through this process will be a key aspect of ensuring a just transition towards net zero as we develop offshore wind in Scottish Waters.

### **Marine Scotland are aware that electricity cabling is a key issue for the fishing sector, we seek to facilitate early engagement with the fishing sector on these matters and guide developers.**

- The Scottish Government are currently engaged in the ongoing Offshore Network Transmission Review (OTNR) that is now considering the increased scale of offshore wind and grid requirements across the UK.
- Marine Scotland intend to carry out a spatial plan for grid, assessing potential impacts across receptors, including commercial fisheries, following outputs of the OTNR.
- We recognise that fishing vessel safety is vital, offshore wind developers have been working with the fishing sector and have undertaken physical cable over-trawl trials at Scottish offshore wind-farms.

### **Fishing Industry Representatives (FIRs) are appointed at Commercial Fisheries Working Groups (CFWGs) & are a vital communication link between the fishing sector and offshore wind developers.**

- Marine Scotland continue to facilitate the resolution of conflicts between the offshore wind and fisheries sectors, through our planning and licensing, with the aim of trying to minimise impacts and maximise communication.
- Many interactions can be challenging with strong opinions expressed, however, we continue to focus on moving conversations forward and focussing on relevant issues.

### **The SG has no formal role or powers in relation to the award of compensation concerning the impact of offshore wind farm developments on the fishing industry.**

## RADAR

- The UK Government published its Offshore Wind Sector Deal in March 2019, building on the UK's global leadership in offshore wind and aiming to maximise the advantages for industry from the global shift to clean growth.
- The Sector Deal contained a commitment to collaborate with industry and other Government departments on strategic barriers to deployment such as radar, environmental issues, and transmission. The Scottish Government is represented across all main work streams, and remains determined to ensure that Scotland's interests are taken fully into account as the Sector Deal continues to progress. We are working closely with the UK Government to deliver a number of key outputs from the Sector Deal, because we know that resolving these issues will be vital to unlocking Scotland's potential.

- The Offshore Wind Industry Council (OWIC) oversees and drives the implementation of the Sector Deal from an industry perspective, and we continue to work with industry on the issue of radar, including through the Joint Windfarm Mitigation Task Force, and the programmes and studies planned as part of this work.

**2. Mr McKee - Presentation - Public Policies Panel FOWT 22 - 16 May 2022**

**Please see separate attachment.**

### 3. Relevant extracts from: Overseas Visits - Min BTTE - France - May 22 - Briefing Pack - MASTER COPY

#### BRIEFING NOTE 1: PRE-BRIEFING WITH SCOTTISH COMPANIES TRAVELLING TO FLOATING OFFSHORE WIND TURBINES (FOWT) 2022

Engagement title	FOWT 2022- Pre-brief	
Engagement timings	09:15-10:00, Monday 16 <sup>th</sup> May 2022	
Organisation	SDI	
Venue and full address	Salle Jofre A Le Corum Place Charles De Gaulle, Montpellier	Postcode 34000
Background / purpose (including invitation history)	SDI will host a pre-briefing with Scottish companies prior to the start of FOWT 2022 programme.  During informal pre-briefing you will meet SDI team and Scottish companies attending FOWT, this is a great opportunity to recognise: <ul style="list-style-type: none"><li>• Importance of France (trading nation)/ renewables (vision for trade)</li><li>• Wishing companies best of luck for the conference programme.</li></ul>	
Relevance to core script	Offshore Wind	
Meeting attendees / greeting party	[REDACTED], Regional Manager, SDI [REDACTED], Senior Trade Specialist, SDI [REDACTED], Senior Inward Investment Specialist, SDI	
Official support and mobile number	[REDACTED], Trade Policy, DITI [REDACTED], International Visits, SDI [REDACTED], Deputy Private Secretary	
Briefing contents  Annex 1a – Running Order Annex 1b – Scottish Companies & Objectives of FOWT		

#### ANNEX 1a

#### RUNNING ORDER

- Welcome & scene setting by [REDACTED], SDI – 2-3 mins
- Roundtable introductions of Scottish companies – 10-15mins
- **Minister's address- 2mins**
- Overview of FOWT programme – [REDACTED], SDI – 3-4 mins
- Networking – 15mins

#### ANNEX 1b

#### SCOTTISH COMPANIES & OBJECTIVES OF FOWT [REDACTED]



**BRIEFING NOTE 2: FOWT PLENARY SESSION “PRESENT & FUTURE PUBLIC POLICIES PROMOTING FLOATING OFFSHORE WIND”**

Engagement title	Floating Offshore Wind Turbines (FOWT) Annual Conference 2022 - Plenary Session	
Engagement timings	10:30-12:00, Monday 16 <sup>th</sup> May	
Organisation	FOWT 2022	
Venue and full address	Le Corum, Place Charles de Gaulle, Montpellier, France	Postcode 34000
Background / purpose (including invitation history)	<p><b><u>Background</u></b> Floating Offshore Wind Turbines (FOWT) the world's largest annual conference dedicated to floating offshore wind takes place 16-18th May at Le Corum of Montpellier (Occitanie, France). It will gather 900 delegates from 30 countries representing all the leading floating offshore wind companies.</p> <p><b><u>Purpose</u></b> As part of the Scottish delegation, you have been invited to provide opening remarks and participate in an open discussion which will focus on “<i>Present &amp; Future Public Policies promoting floating offshore wind</i>”. Your participation will aim to:</p> <ul style="list-style-type: none"><li>• Raise Scotland's profile as the world leader in floating offshore wind market</li><li>• SG's commitment to the sector to drive innovation and develop supply chain; through Scotwind and INTOG;</li><li>• Encourage French and European companies to collaborate with Scottish supply chain companies and to invest in Scotland</li><li>• Highlight Scotland's Net zero ambitions, achievements and the OW developments contribution to it;</li></ul> <p><b>Giles Dickson, CEO of Wind Europe</b> will moderate the panel discussion. Joining you in person will be:</p> <ul style="list-style-type: none"><li>• <b>Sophie Murlon</b>, French Ministry for the Ecological Transition, Director for Energy</li><li>• <b>Elisabeth Sæther</b>, Norwegian Ministry of Petroleum and Energy State Secretary</li></ul>	
Meeting attendees / greeting party	Giles Dickson, CEO of Wind Europe  <b>[REDACTED]</b> , Regional Manager <b>[REDACTED]</b> , Senior Trade Specialist <b>[REDACTED]</b> , Senior Inward Investment Specialist	
Official support and mobile number	<b>[REDACTED]</b> , Trade Policy, DIT <b>[REDACTED]</b> , Deputy PS for Minister <b>[REDACTED]</b> , International Visits, SDI	
<p><b>Briefing contents</b> <b>Annex 2a – Summary – Running order and Detailed lines to take on agreed discussion topics</b> <b>Annex 2b – Biographies of panellists</b></p> <p><i>Powerpoint presentation and corresponding speaking notes are attached as separate documents.</i></p>		

**SUMMARY****RUNNING ORDER**

- **Introductory remarks** from Giles Dickson, CEO of Wind Europe (10 min)
- **Part 1 (max. 15 mins each) – introductory speeches / remarks**
  - o France / Laurent Michel
  - o Norway / Elisabeth Saether
  - o Scotland / Ivan McKee
- **Part 2 (20 min in total) – Q&A moderated by Giles Dickson**

**DETAILED LINES TO TAKE ON AGREED DISCUSSION TOPICS****12 May: Norway announces new target of 30GW of offshore wind by 2040*****Lines to take:***

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## **RADAR**

- The UK Government published its Offshore Wind Sector Deal in March 2019, building on the UK's global leadership in offshore wind and aiming to maximise the advantages for industry from the global shift to clean growth.
- The Sector Deal contained a commitment to collaborate with industry and other Government departments on strategic barriers to deployment such as radar, environmental issues, and transmission. The Scottish Government is represented across all main work streams, and remains determined to ensure that Scotland's interests are taken fully into account as the Sector Deal continues to progress. We are working closely with the UK Government to deliver a number of key outputs from the Sector Deal, because we know that resolving these issues will be vital to unlocking Scotland's potential.
- The Offshore Wind Industry Council (OWIC) oversees and drives the implementation of the Sector Deal from an industry perspective, and we continue to work with industry on the issue of radar, including through the Joint Windfarm Mitigation Task Force, and the programmes and studies planned as part of this work.

## **BIOGRAPHIES OF PANELLISTS**

### **Panellists**



#### **Giles Dickson, CEO of Wind Europe**

Giles Dickson has been Chief Executive Officer of WindEurope, since 2015. WindEurope is the voice of the European wind industry. It represents the whole value chain of onshore and offshore wind across Europe and has more than 400 members. It engages Governments and other stakeholders on policy and regulation. It organises industry exhibitions, conferences and workshops. And it coordinates publicly-funded R&D in wind. Giles is also Chairman of the independent Advisory Council of ENTSO-E, the European Network of Transmission System Operators for Electricity. From 1992 to 2008 he was a civil servant in the UK Government, working mostly on European affairs. From 2008 to 2015 he worked for the French engineering company Alstom where he was Vice-President for Global Public Affairs.



#### **Elisabeth Sæther Norwegian Ministry of Petroleum and Energy State Secretary**

Ms. Sæther worked as a political advisor for the Norwegian Labor Party's parliamentary group from February 2022, before being appointed State Secretary. Prior to this, she worked for the Norwegian Agrarian Association as an advisor for more than six years. Ms. Sæther has also worked for Statnett, the non-profit industry organization Energy Norway, the Norwegian Society for the Conservation of Nature and the Bellona Foundation. Elisabeth Sæther has an MSc in Political Science from the University of Oslo.



#### **Sophie Murlon, Directorate General for Energy and Climate of the Ministry of Ecological Transition, Director of Energy**

Appointed in 2019, Sophie is a graduate of the French Environment and Energy Management Agency (Ademe). She began her career at the French Nuclear Safety Authority (ASN). She first served as deputy head of the nuclear boiler control office from September 2002 to June 2005, then as director of nuclear pressure equipment and head of the Dijon division from June 2005 to December 2007, according to her LinkedIn profile. After leaving ASN at that time, Sophie Murlon rejoined it from August 2011 to October 2014, as deputy director general.

Sophie Murlon had been deputy to the director general of development, housing and nature at the Ministry of Ecological Transition since February 2018.



## BRIEFING NOTE 3: MOU SIGNING BETWEEN DEEPWIND CLUSTER AND WINDOCC

Engagement title	MoU signing between the Deepwind Cluster and WindOCC	
Engagement timings	12:30-13:00, Monday 16 <sup>th</sup> May 2022	
Organisation	WindOcc & Deepwind	
Venue and full address	Sully 2 Meeting Room Le Corum, Place Charles De Gaulle, Montpellier, France	Postcode 34000
Background / purpose (including invitation history)	WindOcc and Deepwind Cluster are signing an MoU during FOWT 2022 to recognise their shared vision, understanding and collaboration on floating offshore wind and hydrogen supply chain development in Region Occitanie, Scotland and internationally. Brief ministerial remarks will highlight: <ul style="list-style-type: none"><li>• Scotland and France’s shared aspirations for floating wind and hydrogen</li><li>• Recognise this agreement has the potential to bring many benefits for the Scottish supply chain</li><li>• Express hope that the parties will seek ways to leverage existing supply chain competence and skills which can be translated from the well-developed oil and gas sectors to support our Just Transition.</li></ul>	
Meeting attendees / greeting party	Jenni SVÄRD, Communication Director, AD'OCC  [REDACTED], Regional Manager, SDI [REDACTED], Senior Trade Specialist, SDI	
Supplementary information / sensitivities	[REDACTED]	
Official support and mobile number	[REDACTED], International Visits, SDI [REDACTED], Trade Policy, DITI [REDACTED], Deputy Private Secretary, SG	
Briefing contents Annex 3a – Summary – Running Order and Key Facts Annex 3b – Speaker Note		

**ANNEX 3a**

### **SUMMARY**

#### **RUNNING ORDER**

- **12:15-** AD'OCC, Jean Marc Dessapt and SDI, **[REDACTED]**- 3 minutes
- **12:19-**Signature of the agreement by Ms Barois (Wind'Occ) and **[REDACTED]** (DeepWind)
- **12:21-** President Carole Delga, 5 mins
- **12:24- Minister McKee, 5 mins (Please refer to Speaker Note in Annex 3b.)**
- **12:29-** Closing by **[REDACTED]**, Senior Trade Specialist, SDI, 1 min

#### **KEY FACTS**

- The Occitanie Region has set the ambition to become the first Climate positive European Region by 2050, focusing on two important pillars:
  - Reduction of the overall energy consumption and increase of energy efficiency.
  - Massive development of Renewable energies with an objective to cover 100% of the region's energy needs by 2050
- Two priority subsectors in Occitanie region are Floating Offshore wind and Solar.
- Occitanie has become the frontrunner in France for the development of floating Offshore wind farms, with two demonstration farms (30MW each) currently under construction.
- SDI in France have developed a strong relationship with Ad'Occ (Regional Development Agency) and Wind'Occ (Offshore wind cluster) over the past years.
- The signature of the MOU is another milestone towards even tighter relations between the Occitanie and Scottish floating offshore wind supply chains.

## **ANNEX 3b**

### **SPEAKER NOTE**

#### **Introduction**

- Bonjour à tous - hello everyone. I'm delighted to be here in Montpellier and join you for Floating Offshore Wind Turbines 22.

#### **Purpose of MoU**

- Today, I will witness the signing of the MoU between Deepwind, Scotland's floating wind cluster and Wind'Occ, the Regional Offshore Wind Dynamic in the Occitanie region of France.
- With the energy transition moving at pace, this collaboration highlights how crucial floating wind and hydrogen are in the decarbonisation of energy systems.

#### **Benefits for France & Scotland**

- The MoU demonstrates both Scotland and France's shared aspirations in sector. It will strengthen both regions' position in floating wind and hydrogen markets and through partnership working will agree to seek areas of strategic benefit to Scotland and France as well as to their supply chain members.

#### **Conclusion**

- I hope both parties to the MoU find ways to leverage existing supply chain competence and skills that can be translated from the well-developed oil and gas sectors to support our Just Transition.
- I'd like to thank the organisers for inviting me to witness the MoU and I look forward to following the progress and success of this collaboration between Scotland and France.

#### **ENDS (192 words)**

## BRIEFING NOTE 4: MEETING WITH QAIR FRANCE

Engagement title	<b>Meeting with Qair Group</b>
Engagement timings	Monday 16 <sup>th</sup> May, 13:30-14:15
Venue and full address	Salle Joffre A Le Corum, Place Charles de Gaulle, Montpellier, France, 34000
Background/Purpose	<p>Qair Group is a T&amp;I target and winner of ScotWind leasing round (as part of Thistle Wind Partners consortium alongside DEME and Aspiravi). DEME (partner of Qair's projects in Scotland) will also join meeting.</p> <p>Qair is at FOWT 2022 and this is an opportunity to discuss:</p> <ul style="list-style-type: none"> <li>○ Growth plans/ambitions</li> <li>○ Explore opportunity for Qair's involvement in their French/global projects.</li> <li>○ Highlight importance of using Scottish supply chain to focus on: <ul style="list-style-type: none"> <li>▪ <b>[REDACTED]</b></li> </ul> </li> </ul>
Meeting attendees	<p><b>Louis Blanchard:</b> President of Qair International SAS  <b>Jerome Billerey:</b> General Manager Qair France SAS  <b>Guirec Dufour:</b> Deputy General Manager Qair France SAS  <b>Olivier Guiraud:</b> General Manager Qair Marine SAS  <b>Ian Taylor:</b> Project Development Director Thistle Wind Partners (partnership Qair ; DEME ; Aspiravi for Scotwind)  <b>Albert Juanola Freixas:</b> Director Thistle Wind Partners Deepwind  <b>[REDACTED]:</b> Project Manager, DeepWind</p>
Official support	<p>DITI / SG:</p> <ul style="list-style-type: none"> <li>○ <b>[REDACTED]</b>, DITI Trade Policy, <b>[REDACTED]</b></li> <li>○ <b>[REDACTED]</b>, Deputy Private Secretary to Minister McKee</li> </ul> <p>SDI / SE:</p> <ul style="list-style-type: none"> <li>○ <b>[REDACTED]</b>, International Visits, SDI, <b>[REDACTED]</b></li> <li>○ <b>[REDACTED]</b>, Regional Manager &amp; Head of Energy Trade EMEA, SDI France, <b>[REDACTED]</b></li> <li>○ <b>[REDACTED]</b>, Senior International Trade Specialist, SDI</li> <li>○ <b>[REDACTED]</b>, Senior Inward Investment Specialist, SDI, <b>[REDACTED]</b></li> </ul>
<p>Briefing contents:</p> <p><b>Annex 4a</b> – Strategic context and suggested points to make</p> <p><b>Annex 4b</b> – Background</p> <p><b>Annex 4c</b> – Biographies</p>	

### ANNEX 4a

## STRATEGIC CONTEXT

**Opportunity to use this meeting to encourage Qair to become a key partner with Scotland** and understanding the company's future growth plans (beyond Scotwind) and its ambitions for Scotland. Also, an opportunity to highlight the Scottish supply chain to the company which can help the company with the different projects in France and globally.

## **SUGGESTED POINTS TO MAKE**

### **Welcome Qair as a new investor to Scotland's offshore wind market and their commitment to net zero**

- Highlight Scotland's values-led inward investment strategy, capabilities, connections etc. that Qair could utilise
- Highlight the 'Team Scotland' approach that Scotland takes to supporting businesses and investors. Encourage them to remain engaged with relevant enterprise agencies
- You are keen to build strong relationships with leading investors to invest in Scotland and want to maintain a strong dialogue

### **Highlight support and opportunities that come with growth of offshore wind and local supply chain in Scotland**

- Scottish Government's position and expectations in terms of local content as far as Scotwind Offshore wind projects are concerned.
- Role of Scottish Offshore Wind Energy Council in coordinating growth of offshore wind and the local supply chain
- Highlight support SDI and partners can provide to Qair (fisheries, tourism, etc.)

### **French market – opportunities for Scottish energy companies**

- Outline Scotland's ambitions in terms of internationalisation of the energy supply chain
- Suggest Qair works with SDI on a "meet the buyer" session with Scottish companies operating in niche areas they identified as gaps
- SDI's collaboration approach with French floating wind regions including Occitanie and Brittany and reference signature of an MOU with Occitanie region.

## **ANNEX 4b**

## **BACKGROUND**

### **CURRENT SITUATION**

As part of the Thistle Wind Partners (TWP) consortium, alongside with DEME concessions (BE – 42,5%) and Aspiravi (BE – 15%), Qair (42,5%) has been awarded seabed rights in the framework of Scotwind. In January 2022, Qair announced the development of a subsidiary in Scotland, as a result of its collaboration with Eco projects, a Scottish renewables project developer (onshore and solar). Qair has ambitions to reach 5 GW in five years, split 50/50 between wind and solar.

## **COMPANY PROFILE**

Qair (originally called Qadran) established in Montpellier (Hérault) in 2017 is a renewable energy project developer with several subsidiaries focused on the following sectors: offshore renewables,

Green Hydrogen, Onshore renewables, Waste to Energy and Private Equity. Qair employs 300 people, a third of whom are in Montpellier, Paris and Port-la-Nouvelle (Aude). Qair had 650 MW renewable energy projects in operation end of 2021 and target 1 GW for 2022.

The Group is a major player in floating offshore wind energy. They won The French Energy Agency's call for tender "Floating Wind Farm Pilot Project" and are currently developing EolMed floating wind farm located in the Mediterranean Sea in Occitanie region. Qair with Total Energies and Green Investment Group has been pre-selected with other consortia for the 250 MW commercial floating wind farm off the coast of Brittany.

Qair develops solar and wind projects in co-development with regional companies and aims to commission large scale ground or floating power plants, the first of which will be connected to the grid by 2023.

#### Company Activity

[REDACTED]

#### Recent engagement

[REDACTED]

March 2022- Cabinet Secretary Michael Matheson met with Thistle Wind Partners consortium following their successful ScotWind bid.

[REDACTED]

### BIOGRAPHIES

#### **Louis Blanchard, Founder of Qair France**

Become president of Qair in March 2021, previously was founder of French entity of the investment bank Taylor-DeJongh, and received, together with Jean-Marc Bouchet, received The Entrepreneur of the Year award is organized by EY, in partnership with HSBC, Verlingue, Steelcase and Bpifrance.



#### **Jerome Billerey: General Manager Qair France SAS**

Jerome Billerey is the CEO of Qair France and Director of the french renewables trade body (SER). He spent eight years as the CEO of Aerowatt, a company specialised in onshore wind, and 10 years as the director of Vergnet, French solar and onshore wind project developer.



#### **Guirec Dufour: Deputy General Manager Qair France SAS**

#### ANNEX 4c

Guirec Dufour joined Qair 1 month ago as a Deputy General Manager at Qair France. He worked during 2 years as the CEO of Gensun, an engineering company specialised in solar panels. He also was Construction Director at Total Quadran for 12 years.



**Olivier Guiraud: General Manager Qair Marine SAS**

Olivier Guiraud is General Manager at Qair Marine for 4 years and previously worked as Offshore Manager at Quadran Energies, a renewable project developer.



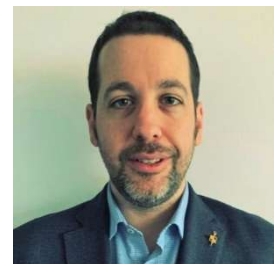
**Ian Taylor: Project Development Director Thistle Wind Partners (partnership Qair ; DEME ; Aspiravi for Scotwind)**

Ian Tarloy Is Project Development Director at Thistle Wind Partners and DEME Offshore Country Manager, UK & Ireland DEME Offshore Country Manager, UK. He was Managing Director at Newwaves Solutions for 5 years, a subsidiary of DEME specialised in offshore operations in the UK



**Albert Juanola Freixas: Director Thistle Wind Partners**

Albert Juanola Freixas is Director at Thistle Wind Partners. He was Offshore Wind Business Development Director at Qair group for 1 year. He was Head of Offshore Wind at CEZ for 3 years, a renewable energy project developer



## BRIEFING NOTE 5: MEETING WITH DANIEL CUEFF, VICE-PRESIDENT OF THE BRITTANY REGION

Engagement title	1:1 Meeting with Daniel Cueff, Vice-President of the Brittany region in charge of the sea and coastline
Engagement timings	16 May 14:30 – 15:15
Venue and full address	Meeting room FOWT Montpellier
Background/Purpose	<b>[REDACTED]</b>  This is an opportunity to follow up on Mr Gray's VC with Brittany President, Loig Chesnais-Girard in March 2022, and to discuss trade opportunities, their port strategy and collaboration on marine energy/renewables.
Meeting attendees/ Greeting party	An interpreter will attend to provide two way translation for the meeting. <b>Interpreter: [REDACTED]</b>  M. Cueff will be accompanied by : <ul style="list-style-type: none"><li>• Philippe Thieffry, Project Coordinator, Bretagne Ocean Power</li><li>• Jean-Michel Lopez, Deputy Director General, Brittany Region</li></ul>
Official support incl mobile no.	DITI / SG: <ul style="list-style-type: none"><li>○ <b>[REDACTED]</b>, DITI Trade Policy, <b>[REDACTED]</b></li><li>○ <b>[REDACTED]</b>, Deputy Private Secretary to Minister McKee</li></ul> SDI / SE: <ul style="list-style-type: none"><li>○ <b>[REDACTED]</b>, Regional Manager &amp; Head of Energy Trade EMEA, SDI France, <b>[REDACTED]</b></li></ul>
Briefing contents: <b>Annex 5a</b> – Summary – Strategic context and suggested points to make <b>Annex 5b</b> – Background and Key Facts <b>Annex 5c</b> – Biographies	

### ANNEX 5a

## SUMMARY

### STRATEGIC CONTEXT

Neil Gray (NG) held a VC with Brittany President, Loig Chesnais-Girard (LCG), on 29 March 2022, building on the President's meeting with the FM during COP26:

- **[REDACTED]**
- Both agreed that **there will be opportunities to make contact on a regular basis before then - your meeting with M. Cueff is one of those opportunities.**
- **[REDACTED]**
- NG acknowledged with LCG the pressing need to get to net zero and was interested to learn more from Brittany about their **port strategy**. This is an opportunity to follow up on this.

### SUGGESTED POINTS TO MAKE

- Pleased that the Brittany region took a significant delegation to COP26 and that the President of Brittany was able to meet with our First Minister.

- **[REDACTED]**
- I am keen to explore opportunities for collaboration with Brittany in the trade and innovation space – and particularly in the fields of marine/ renewable energy.

## **ANNEX 5b**

### **BACKGROUND**

Brittany is a priority region for Scottish Government's Paris Hub due to Scotland's shared Celtic heritage with Brittany and our existing strong cultural links.

**[REDACTED]**

### **KEY FACTS**

The Brittany Region owns their ports which creates opportunities as they move towards decarbonisation.

LCG is impressed by Scotland's marine energy capabilities and offshore wind strategy – noted that Brittany is working on a wind farm pilot and is 10 years behind Scotland in this regard.

The Brittany Region is very willing to share with Scotland their practice and experience on manufacturing, and LCG noted that there is industrial space available in Breton ports.

## **ANNEX 5c**

### **BIOGRAPHIES**

#### **Daniel Cueff, Vice-President of the Brittany region in charge of the sea and coastline**

Daniel Cueff, born on 21 March 1955 in Saint-Pol-de-Léon, is a Breton politician.

He became known to the general public in May 2019 for his municipal decree banning phytosanitary treatments in the immediate vicinity of homes in the commune of Langouet, of which he was the mayor for some twenty years. He is also known for several actions in favour of the environment in rural areas.

Daniel Cueff has held a doctorate in education since 2000. From 1997 to 2010, he was an associate lecturer at the University of Rennes 1 at the IUT Carrières Sociales, where he taught anthropology and project methodology. In 1980, he founded the Groups of Pedagogy and Social Animation (GPAS) in Brest, Rennes, Cap Sizun, Val d'Ille and Warsaw. He was Secretary General until March 2008.

In June 2021, he was a candidate on the Bretagne ma vie list, which obtained 6.52% of the votes cast in the first round of the regional elections in Brittany and merged with the list of the outgoing president, Loïg Chesnais Girard.

He then became vice-president for the sea and the coastline in order to implement an integrated maritime policy aimed at ensuring that all regional policies converge towards the sea.







**Philippe Thieffry, Project Coordinator, Bretagne Ocean Power**

Philippe Thieffry is a Naval Architecture Engineer with 10 years experience in the field of Marine Renewable Energies within a large industrial group.

Through his role as head of the Bretagne Ocean Power mission, Philippe Thieffry puts his skills at the service of local companies in their development on the MRE market. He is the privileged contact for the principals: energy companies, project developers and leading industrialists, and ensures their link with the industrial and port environments and the Breton supply chain.

Finally, by relying on its knowledge of the players and the international market, it helps companies to develop their export activities and promotes the conditions for welcoming potential foreign investors to Brittany.



**Jean-Michel Lopez, Deputy Director General, Brittany Region**

## BRIEFING NOTE 6: MEETING WITH PONTICELLI

Engagement title	<b>Meeting with Ponticelli</b>
Engagement timings	Monday 16 <sup>th</sup> May, 15:30-16:00
Venue and full address	Salle Joffre A Le Corum, Place Charles de Gaulle, Montpellier, France, 34000
Background/Purpose	<p>Ponticelli is an independent and family-owned business specialising in the provision of industrial services. It operates in various business sectors ranging from Energy and chemicals to steelworks. The group, headquartered in the Paris Region employs 5,000 staff members (70% in France) and a global turnover of about €800m</p> <p>Ponticelli is a leading partner in a consortium called PBS (Ponticelli, Brand and Semco) which has a large presence with 800 + employees in Aberdeen for O&amp;G maintenance services for Total energies. They won the maintenance contract with Total energies in 2020 and set up their office in Scotland</p> <p>The company's ambition is to shift to offshore wind and Scotwind is a great opportunity for them.</p> <p>The meeting will focus on:</p> <ul style="list-style-type: none"><li>– Development plans in Scotland</li><li>– Potential opportunities, challenges and support they would need from SG/SDI.</li></ul>
Meeting attendees	<b>Vincent Ladougne</b> , Global Business Development Director
Official support	<p>DITI / SG:</p> <ul style="list-style-type: none"><li>○ [REDACTED], DITI Trade Policy, [REDACTED]</li><li>○ [REDACTED], Deputy Private Secretary to Minister McKee</li></ul> <p>SDI / SE:</p> <ul style="list-style-type: none"><li>○ [REDACTED], International Visits, SDI, [REDACTED]</li><li>○ [REDACTED], Regional Manager &amp; Head of Energy Trade EMEA, SDI France, [REDACTED]</li><li>○ [REDACTED], Senior Inward Investment Specialist, SDI, [REDACTED]</li></ul>
<p>Briefing contents:</p> <p><b>Annex 6a</b> – <i>Strategic context and suggested points to make</i></p> <p><b>Annex 6b</b> – <i>Company background</i></p> <p><b>Annex 6c</b> – <i>Biographies</i></p>	

### ANNEX 6a

#### STRATEGIC CONTEXT

**Opportunity to use this meeting to encourage Ponticelli to become a key partner with Scotland** and understanding the company's future growth plans (beyond Scotwind) and its ambitions for Scotland. Also, an opportunity to highlight the Scottish supply chain to the company which can help the company with the different projects in France and globally.

#### SUGGESTED POINTS TO MAKE

### **Discuss Ponticelli's operations in Scotland and their experience as a new investor in Scotland**

- [REDACTED]
- Highlight Scotland's values-led inward investment strategy, capabilities, connections etc. that Ponticelli could utilise
- Highlight support that Scottish agencies (SE/SDI/SDS/HIE) can provide to companies through skills, training, funding etc. and encourage them to remain engaged with relevant enterprise agencies

### **Ponticelli's Floater manufacturing site project**

- Highlight the Scottish Government's position and expectations in terms of local content / supply chains as far as Scotwind Offshore wind projects are concerned.
- Role of Scottish Offshore Wind Energy Council in coordinating growth of offshore wind and the local supply chain
- Scottish Government's and industry groups' plans on skills development to deliver the Scotwind projects

### **Opportunity to provide an overview of the recently published National Strategy for Economic Transformation**

- Our new National Strategy for Economic Transformation contains bold and ambitious actions - within the powers currently available to us - to deliver economic prosperity for all Scotland's people and places
- Scotland has extraordinary economic potential through our natural resources, talent, creativity, academic institutions and business base, with strengths in sectors such as financial services, food and drink, and tourism and hospitality
- With fair work and a just transition at its heart, the strategy builds on the Covid Recovery Strategy and will support progress towards net zero, help restore the natural environment, stimulate innovation and create jobs

## **ANNEX 6b**

### **BACKGROUND**

#### **Scottish operations**

The Group's only UK operation is in Aberdeen, set up in 2020, to deliver a maintenance contract for Totalenergies for 7 years, with a total headcount of 800 employees.

The Scotwind and INTOG programmes represent strong opportunities for Ponticelli [REDACTED]

#### **Floating Manufacturing Project – Current Situation** **[REDACTED]**

#### **Company profile**

Ponticelli Frères is an independent and family-owned group providing industrial services mainly to companies in the oil and gas, energy, chemical, pharmaceutical and steelworks sectors.

The Group's Operating Turnover in 2021 was €785m. With 5,000 employees (around 3,500 in France), Ponticelli has an international presence primarily in Europe (France, Spain, Portugal, Benelux, UK and Poland), West -Africa, Central America and the Middle East.

60 percent of the group's turnover represents the O&G sector solutions, followed by the nuclear (15%), Renewables (10%), Industries (10%) and Life Sciences (5%). With the current climate change challenges and energy transition, Ponticelli group have a strong focus to grow its Renewables market share and to provide solutions for the renewable industries. Digitalisation is another key part of the group's strategy.

#### Recent engagement

Since Ponticelli set up in Aberdeen in 2020, SDI has engaged with Vincent Ladougne who has attended INTOG briefing session in Aberdeen and has been in contact with SDI Paris office regarding the new investment project.

Vincent has been introduced to some of the ports and stakeholders in Scotland and Ponticelli are now members of the Deepwind cluster.

[REDACTED]

#### ANNEX 6c

#### BIOGRAPHIES



**Vincent Ladougne**  
**Business Development Director at Groupe Ponticelli Frères**

Vincent Ladougne graduated in Engineering and Finance in Paris and spent over 20 years in the construction industry for the energy sector before joining Ponticelli in 2015 as Group Business Development Director. Ponticelli is a 100-year old French group reputed in the energy sector for construction and maintenance activities, currently active in Europe, Middle East and Africa with a staff of over 5,000 permanent employees, with over 10% of those in Scotland working in the O&G industry.

Vincent Ladougne is also Commercial and Development Director of ArchiMed, a dedicated offshore wind subsidiary of Ponticelli which was established in Occitany in 2020 with JV partner Matière in order to build the first floating offshore wind foundations 100% made in France.

## BRIEFING NOTE 8: MEETING WITH BW IDEOL

Engagement title	<b>Meeting with BW Ideol</b>
Engagement timings	Monday 16 May 2022, 17:15-18:00
Venue and full address	Joffre A (Meeting Room) Le Corum, Place Charles de Gaulle, Montpellier, France, 34000
Background/Purpose	<p>BW Ideol, is a global leader in floating offshore wind with more than 11 years of experience from design, execution and development of floating wind projects.</p> <p>As a member of the Floating Energy Alliance BW Ideol has secured the rights to develop a floating offshore wind farm with an approximate capacity of 1GW off the northeast coast of Scotland through Crown Estate Scotland's ScotWind leasing round.</p> <p>As part of the ScotWind consortium, BW Ideol is exploring options for manufacturing at a port site close to Cromarty Firth.</p> <p>CEO, Paul de Guérivière and his leadership team are attending FOWT 2022, which presents an opportunity to discuss:</p> <ul style="list-style-type: none"> <li>○ BW Ideol's ambitions and plans for Scotland, beyond ScotWind;</li> <li>○ Explore BW Ideol's contribution – as floating wind industry leader and how it can assist Scotland achieving its renewable energy targets;</li> <li>○ Explore advantages BW Ideol's unique concrete-based technology has to enable the highest possible levels of local content;</li> <li>○ Find out about BW Ideol's investment in Floating Energy Supply Chain Fund to support as many Scottish companies as possible to compete for work across the project.</li> </ul>
Meeting attendees	<b>Paul de la Gueriviere</b> , CEO BW Ideol <b>Bruno Geschier</b> , Chief Sales & Marketing Officer <b>Steven Regan</b> , Owner of Port Ardersier
Supplementary information / Sensitivities	<b>[REDACTED]</b>
Official support	DITI / SG: <ul style="list-style-type: none"> <li>○ <b>[REDACTED]</b>, DITI Trade Policy, <b>[REDACTED]</b></li> <li>○ <b>[REDACTED]</b>, Deputy Private Secretary to Minister McKee</li> </ul> SDI / SE: <ul style="list-style-type: none"> <li>○ <b>[REDACTED]</b>, Regional Manager &amp; Head of Energy Trade EMEA, SDI France, <b>[REDACTED]</b></li> <li>○ <b>[REDACTED]</b>, Senior Inward Investment Specialist, SDI, <b>[REDACTED]</b></li> </ul>
Briefing contents: <b>Annex 8a – Strategic context and suggested points to make</b> <b>Annex 8b – Current situation and Company background</b>	

## **ANNEX 8a**

### **STRATEGIC CONTEXT**

This meeting **represents an opportunity to engage and discuss the BW Ideol's plans in Scotland** in relation to Scotwind and beyond. The meeting also presents an opportunity to understand the expertise that BW Ideol brings with their floating foundations which are much larger than others and made from concrete, which opens up opportunities for BW Ideol to produce locally using supply chain in Scotland.

### **SUGGESTED POINTS TO MAKE**

#### ***BW Ideol's plans beyond Scotwind - Explore BW Ideol's growth ambitions and promote Scotland as a destination for further investment***

- Highlight the 'Team Scotland' approach that Scotland takes to supporting businesses and investors
- Understanding the supply-chain gaps that BW ideol might have and how they intend to use the supply chain.
- Re-iterate that SDI are happy to work with BW ideol on "meet the buyer" or "technical workshops"

#### ***Opportunity to provide an overview of the recently published National Strategy for Economic Transformation***

- Our new National Strategy for Economic Transformation contains bold and ambitious actions - within the powers currently available to us - to deliver economic prosperity for all Scotland's people and places
- Scotland has extraordinary economic potential through our natural resources, talent, creativity, academic institutions and business base, with strengths in sectors such as financial services, food and drink, and tourism and hospitality
- With fair work and a just transition at its heart, the strategy builds on the Covid Recovery Strategy and will support progress towards net zero, help restore the natural environment, stimulate innovation and create jobs.

#### ***Recognise Scottish Government's ambition of internationalisation of Scottish companies as per objectives of A Trading Nation***

- SG and SDI aim to create conditions which allow Scottish companies to contribute to the success of projects around the world.

**To note: [REDACTED]**

## **ANNEX 8b**

### **CURRENT SITUATION**

BW Ideol is part of the Floating Energy Alliance, which has secured the rights to develop a floating offshore wind farm with an approximate capacity of 1GW off the northeast coast of Scotland through Crown Estate Scotland's Scotwind leasing round.

[REDACTED]

## **COMPANY BACKGROUND**

BW Ideol is a pure player in floating offshore wind with more than 11 years of experience from design, execution and development of floating wind projects based on Ideol S.A.'s patented floating offshore wind technology and project engineering capabilities. BW Ideol has two full-scale offshore floating wind turbines in operation in France and Japan and a significant project pipeline, including EolMed, a 3 x 10MW pre-commercial floating wind project off the French Mediterranean, and 1GW under development off Scotland.

BW Ideol's leadership is keen to address the constraints with the lack of infrastructure to deliver the number of floating foundations required for the UK market's ambitious development plans, both in terms of local content and the production rate expected. [REDACTED]

Since February 2021, BW Ideol is supported by BW Offshore as strategic shareholder. BW Offshore brings an extensive experience from development and operation of complex and capital intensive offshore energy production systems across the globe.

BW Ideol is a key player in the offshore wind projects value chain and is establishing itself as a supplier-manufacturer of the "foundation system" in partnership with recognised leaders in their fields. BW Ideol has clear strategic targets:

- Expand and mature a significant portfolio of development projects,
- Growth as a technology and EPC services provider,
- Become a long-term asset owner and operator.

## **Scottish operations**

No current operations in Scotland, however BW Ideol's pipeline of projects represents a unique opportunity to create a dedicated supply chain in Scotland. BW Ideol reaffirms its strong commitment to manufacture floaters in Scotland, creating a sustainable floating wind industry and maximising local content in the process.

## **Recent engagement**

Over the past 6 years SDI has engaged with BW Ideol's Northern Europe representative, who has been encouraged by Scotland's capabilities and is keen to explore how and where they could bring their technology into Scotland.

## **ANNEX 8c**

## **BIOGRAPHIES**



**Paul de la Guérivière, CEO BW Ideol**

Paul has been the CEO of BW Ideol since its creation in 2010. He has supported the development and transformation of the company, since its early focus on technology development, to the deployment of demonstrators and now its worldwide expansion on a large portfolio of commercial projects. He has been involved in defining the strategy of the company, structuring and financing the company, managing the strategic acquisition by BW Offshore and the listing of the company on Euronext Growth Oslo.



### **Bruno Geschier, Chief Sales & Marketing Officer**

Educated on both sides of the Atlantic, Bruno started his professional career as entrepreneur and international business development specialist in the US and Canada, focusing his efforts on the construction, engineering services and natural resources industries. He has then managed the international expansion, the foreign subsidiaries and the export activities of innovative and fast-growing SME in the consumer electronics, energy efficiency and renewable energy industries such as ALDES (leader in energy efficient HVAC and IAQ solutions) and FONROCHE ENERGIE (France's largest private player in solar, geothermal and biogas power generation). Multilingual and multicultural, he holds a Master of Science degree in Management.



### **Steven Regan (Owner of Port Ardersier)**

A client focused senior executive with a proven track record of leading sustainable growth and profitability in a large privately owned business. Proven track record of creating new business models, executing strategies, and controlling budgets.

Extensive experience in building and infrastructure projects spanning across Europe, the Middle East and South East Asia, particular expertise is in large scale complex civil engineering projects in the industrial and infrastructure sectors. Leading collaborative teams on large projects where innovation in design and construction delivers simple, efficient solutions to complex problems. Specialties: Strategic Business Growth, Establishment of Self Delivery model , Large scale complex infrastructure.



## BRIEFING NOTE 13: MEETING WITH H2V INDUSTRY

<b>Engagement title</b>	<b>Meeting with H2V Industry</b>
<b>Engagement timings</b>	Tuesday 17 <sup>th</sup> May, 11:45-12:30
<b>Venue and full address</b>	The British Ambassador's Residence 39 Rue du Faubourg Saint-Honoré, 75008 Paris, France
<b>Background/Purpose</b>	<p>H2V Industry is dedicated to the mass production of hydrogen by water electrolysis based on energy certified 100% renewable</p> <p>The company's ambition is to develop large scale low carbon hydrogen production plants in the UK and they are considering Scotland as an option</p> <p>Objectives of the meeting are to:</p> <ul style="list-style-type: none"><li>▪ Reaffirm Scotland's commitment to net Zero</li><li>▪ Highlight SG's Hydrogen strategy</li><li>▪ Confirm Scotland is willing to host their project (<i>mobilising the relevant connections and support required</i>).</li></ul>
<b>Meeting attendees</b>	<b>Yannick Bonin</b> , Director of Hydrogen Development, H2V <b>Jean Philippe Oliver</b> , Managing Director, Samfi Invest (one of H2V's key shareholders)
<b>Official support</b>	<p>DITI / SG:</p> <ul style="list-style-type: none"><li>○ [REDACTED], DITI Trade Policy, [REDACTED]</li><li>○ [REDACTED], Deputy Private Secretary to Minister McKee</li></ul> <p>SDI / SE:</p> <ul style="list-style-type: none"><li>○ [REDACTED], Regional Manager &amp; Head of Energy Trade EMEA, SDI France, [REDACTED]</li><li>○ [REDACTED], International Visits, SDI</li></ul>
<b>Briefing contents:</b> <b>Annex 13a</b> – <i>Strategic context and suggested points to make</i> <b>Annex 13b</b> – <i>Background – Current situation and Company profile</i> <b>Annex 13c</b> – <i>Biographies</i>	

### ANNEX 13a

#### STRATEGIC CONTEXT

Opportunity to **positively influence H2V's potential direction of travel to bringing 'green' inward investment projects** to Scotland by highlighting the wider opportunities in the renewables sector, as well as demonstrating the commitment of the Scottish Government to support.

**Opportunity to use this meeting to encourage BV to become a key partner with Scotland and invest** in projects to facilitate the development of an advanced ecosystem for green energy from hydrogen production / generation.

#### SUGGESTED POINTS TO MAKE

### ***Explore H2V's plans for green hydrogen production in Scotland***

- How can SDI and SG support H2V to make connections with sites like Grangemouth?
- Are there any challenges they have faced?
- What would the opportunities bring in terms of investment/jobs?

### ***Reaffirm Scotland's climate ambitions and low carbon hydrogen strategy***

- Highlight Scotland's net zero targets for 2045 to reach carbon neutrality, an ambition backed by important projects:
  - *Scotwind*- will see massive Offshore wind development over the next decade. And Intog which aims to decarbonise the North Sea O&G operations through deployment of offshore renewables combined to energy storage projects
  - *Hydrogen*- publication of hydrogen draft action plan: 5GW by 2030 – 25 by 2045 with a dedicated £100m funding programme

### ***Highlight Scotland's capabilities and Advocate 'Team Scotland's' commitment***

- Scotland is working with several partners incl. Germany (MOU with Hamburg / Scot2Ger project) and the Netherlands to become supplier of Low Carbon hydrogen to Europe
- Scotland is home to a very well developed Energy supply chain, linked to the O&G industry but also due to Scotland's early commitment towards renewables.
- Skills pipeline-.St Andrews, Strathclyde, Aberdeen have developed courses to help develop skills capable of helping develop the H2 economy.
- Recognise the strong alignment between H2V's ambitions and SG's vision (as referenced in our Inward Investment Plan) for a carbon-neutral / Net zero economy.
- Highlight the 'Team Scotland' approach that Scotland takes to supporting businesses and investors

## **ANNEX 13b**

### **BACKGROUND**

#### **CURRENT SITUATION**

H2V Industry belongs to SAMFI-INVEST Group, a private equity firm based in Normandy. H2V Industry invests and develops huge renewable hydrogen production projects, by water electrolysis, mainly for industrial and H2 mobility uses (and injection into the grid when there are incentives).

[REDACTED]

#### **COMPANY PROFILE**

H2V Industry is an industrial company dedicated to the mass production of hydrogen by water electrolysis based on energy certified 100% renewable. H2V Industry has positioned itself as a major industrial player in the penetration of renewable energies in the electrical and gas sectors and in the implementation of the advanced fuels of the 21<sup>st</sup> century.

[REDACTED]

#### **Recent engagement**

Yannick Bonin and his CEO Jean Marc Léonard joined the Hydrogen Investment Dinner that was organised at the Residence of British Embassy Paris on 26<sup>th</sup> October 2021.

SDI met with H2V and Ineos in May 2021 and discussed green hydrogen production opportunities and interest. H2V advised looking for suitable sites to invest in green hydrogen production facilities.

Ineos have previously announced a £2bn investment on site to switch to hydrogen. [REDACTED]

**BIOGRAPHIES****Yannick Bonin, Director of Hydrogen Development, H2V**

Graduated in 2008 as an engineer from Supélec (France) and Ecole Polytechnique de Montréal (Canada). He first managed telecommunication projects and bids in response to calls for tenders at INEO Engineering & Systems. Then, he created and developed Electricity Sales to B2B small and medium consumers sites Activity, in France, at ENGIE. Next, he created and developed Renewable Hydrogen Activity at Storengy. He joined H2V in 2021 to manage the Development Team and develop Renewable Hydrogen projects portfolio.

**Jean-Philippe Olivier, Managing Director Samfi Invest (one of H2V's main shareholders)**

Jean-Philippe worked in Private Equity since 2009. Prior to that he spent 6 years working as legal affairs advisor to President of Epolia. His international experience includes roles in US market with BNP Paribas, Rolex and TYCO.

**SECTION 3 – BACKGROUND BRIEFING****ANNEX A: SDI T&I COUNTRY BRIEF**

**[REDACTED]**

## ANNEX D: COP26 LEGACY AND FOLLOW-UP (DECC)

### Top lines

- COP26 has ended but the climate emergency has not gone away; all levels of government have a critical role to deliver the Paris Agreement
- Whilst the Glasgow Climate Pact does not contain everything that every country wanted, there can be no doubt that COP26 made progress on some important issues. To keep 1.5 alive, the world must now move from commitments to delivery.
- Ahead of COP27, the Scottish Government is focusing its efforts on playing our part to deliver the Glasgow Climate Pact, and to address the biggest global challenge of our time.
- Scotland's COP26 legacy embraces our commitment to drive international progress in just transition among members of the Under 2 Coalition
- We want to use the legacy of COP 26 being in Glasgow to build momentum behind just transition internationally, learning from others while sharing Scotland's story to date.

**There is no doubt that the momentum of COP26 is accelerating our delivery to net zero. The Scottish Government is taking clear action as a result of COP, including against key commitments coming out during the summit.**

- We have published our Hydrogen Action Plan, backed by more than £100m of funding, to help make Scotland a leading nation in the production of reliable, competitive and sustainable hydrogen.
- We have launched the Agriculture National Test Programme, worth £51m to support and encourage farmers and crofters to learn about how their work impacts on climate and nature.
- We have invested £500,000 in the Social Enterprise Fuel Change to accelerate the programme's expansion, and enable more young people to become involved in developing low carbon solutions to climate-related challenges.
- Supported by Scottish Enterprise, leading Scottish agri-tech company Intelligent Growth Solutions secured £42.2m of private investment to drive global expansion plans on innovative approaches to vertical farming technologies.
- Supported by £10m funding package from Scottish Enterprise, Royal DSM unveiled plans for £100m investment in their North Ayrshire site to manufacture a new feed additive, which can reduce methane emissions from dairy cattle and sheep – an investment that will also safeguard more than 300 jobs, increase job numbers in the site, and create 100 to 150 construction jobs over 2 years.
- We agreed an MoU and £2m of Scottish Enterprise funding for Mitsubishi Electric £15m smart factory project will increase production of low-carbon air conditioning products creating 55 jobs.
- The Scottish Government and Michelin held a COP26 event to promote partnership around the transformation of industrial sites. In partnership with Michelin, we will provide support and joint funding of £150,000 over 2 years for the creation of a Net Zero Industrial Cluster Exchange.
- We announced a new £55m multi-year commitment to the Nature Restoration Fund that will fund large-scale, multi-year, multi-partner projects which will help transform and protect our nature and drive forward nature's recovery.

## **ANNEX F: OFFSHORE WIND / SUPPLY CHAIN**

### **Top Lines**

- As outlined in our current Energy Strategy, we expect offshore wind, both fixed and floating, to play a significant role in our energy transition, and we recognise the huge economic opportunity attached to commercial scale development.
- Scotland's natural resources, which include strong and consistent wind resource, along with our established expertise in oil and gas, skilled offshore workforce, excellent port structure and strong innovation hub, make Scotland one of the best places in the world to develop offshore wind and its supply chain.
- On 17th January, Crown Estate Scotland announced the winners of the ScotWind leasing round. This is the first devolved leasing round for offshore wind development in Scottish Waters, and the first leasing round in Scotland in a decade. ScotWind is the world's largest commercial round for floating offshore wind and puts Scotland at the forefront of offshore wind development globally.
- The conclusion of the leasing round is a tremendous vote of confidence in Scotland – the level of ambition shown by the market recognises the seriousness of Scotland's commitment to achieving our net zero targets and sustainable economic growth.
- ScotWind will deliver just under £700m in revenues to the public purse for these initial awards alone. These revenues will help us tackle the twin climate and biodiversity crises. In addition, ScotWind will deliver several billion pounds more in rental revenues when projects become operational – these will of course be invested for the benefit of the people of Scotland.
- ScotWind promises to be transformational in delivering wider economic supply chain benefits to help power Scotland's green recovery in communities across Scotland. I welcome the public commitment made by successful developers to invest at least £1bn in the Scottish economy for every gigawatt generated via ScotWind projects.

### **Supply Chain**

- Scotland is the ideal location for renewables, but recent projects have not delivered the significant economic opportunities we want to see for Scottish businesses.
- Each ScotWind application was required to include a Supply Chain Development Statement (SCDS) setting out its supply chain goals and committing developers to meet those goals through the various stages of their projects.
- These commitments amount to billions of pounds of investment to the Scottish supply chain and economy.
- While lease awards were not contingent on the content of the Development Statements, checks and balances are in place.
- Failure by developers to deliver on their commitments can trigger remedies ranging from financial penalties to an inability to progress to a seabed lease.
- This has produced a leasing round focused on quality and deliverability of bids and the long term prize of supply chain investment that promises to transform the Scottish economy over decades, rather than determining them solely on up-front price through an open auction.
- These statements are not only an indication of what Scotland can achieve, they are our expectation of what the winners will deliver for Scotland.
- This work will be complemented by recent changes to the UKG Contract for Difference Supply Chain Plan process, to ensure greater utilisation of the domestic supply chain. Failure to do so could result in termination of CfD agreements.
- There is considerable ongoing work including the Strategic Infrastructure Assessment (SIA) that was commissioned by the Scottish Offshore Wind Energy Council (SOWEC) to understand how Scotland could capitalise on the economic opportunity resulting from

offshore wind. Published last year, the SIA will now be taken forward by SOWEC, with Ivan McKee MSP, Minister for Business, Trade, Tourism and Enterprise, and Brian McFarlane (SSE) in their capacity as SOWEC co-chairs leading the group to develop an action plan to take forward the SIA's recommendations.

## ANNEX H: HYDROGEN

### Top Lines

- Scotland is the first of the nations of the UK to publish a policy statement on hydrogen. The policy statement sets out a vision for Scotland to become a **leading Hydrogen Nation** with an **ambition to generate 5GW of renewable and low-carbon hydrogen by 2030**, and 25GW by 2045.
- Additionally, the Hydrogen Policy Statement identified the development of a hydrogen economy with a strong export focus a substantial economic opportunity for Scotland.
- The Policy Statement was followed up in November 2021 by our Hydrogen Action Plan where we set out the necessary actions over the next five years to implement the key policy positions and ambitions set out in our Hydrogen Policy Statement. These actions intend to help put Scotland on the pathway to becoming a leading nation by 2045 in the production of competitive and sustainable hydrogen as well as help securing Scotland's future as a centre of international excellence in areas such as innovation, skills and supply chain.
- The action plan is clear that we are keen to play our role in the development of hydrogen in the UK, European and international markets.
- Over the next five years, we will focus on taking action to secure the role of Scottish companies in the global hydrogen supply chain, to work with our international partners to share expertise and develop the sector more quickly, and to ensure Scotland is prepared to play a key role in meeting the growing demand for hydrogen.
- Some of the Action Plan actions in this space include:
  - Developing a **Hydrogen Outreach Programme**
  - Work with our overseas offices and Scottish Development International (SDI) to **boost inbound and outbound trade and investment missions** to secure opportunities for Scottish companies in the international hydrogen market.
  - Working with industry to produce a **Hydrogen Export Plan**

## INTERNATIONAL COLLABORATIONS AND AGREEMENTS

### The Scottish Government has led the way in supporting world-leading hydrogen demonstration projects and is now committing to invest £100 million in the hydrogen sector in Scotland over the next five years

The Scottish Government has a historic strong track record of supporting world-leading hydrogen demonstration projects in Scotland, including

- the H100 Project in Fife which will deliver the first domestic hydrogen heat network in the world. This will afford 300 local households the opportunity to switch from natural gas to 100% green hydrogen for heating their homes;
- A fleet of 65 hydrogen vehicles in Aberdeen, including twenty five double decker hydrogen buses delivered through a flagship EU funded project; and
- In Orkney, we have the world's first hydrogen production from tidal energy; as well as the BIG HIT project, which has been leading the way with the development of green hydrogen territories and sharing lessons learned to help other EU supported projects.

A **floating wind and green hydrogen Franco-Scottish** research and development collaboration was completed in 2021 to review the opportunities for Scottish and French organisations to work together to deliver collaborative innovation in floating wind and hydrogen.

## OFFSHORE WIND HYDROGEN OPPORTUNITY

**Scotland's vast offshore wind resources, skilled technicians, and engineers, highly specialised technical companies and an experienced offshore workforce will be able to assist in bringing forward large scale green hydrogen production.**

### ScotWind

- The offshore wind sector has a vital role to play in decarbonising our energy system and ensuring we become a net-zero economy by 2045. ScotWind is an important step in realising these long-term ambitions and is the most advanced opportunity to gain first mover advantage on floating wind projects anywhere in the World. We are assessing the detail of the ScotWind projects and looking at where the opportunities exist for achieving wider policy objectives including the potential for floating offshore wind projects and **green hydrogen production** to help meet our ambition of generating 5GW of green and low-carbon hydrogen by 2030 and at least 25GW by 2045.
- Many of the consortia successful in securing lease options have ambitions for green hydrogen, presenting a range of new energy and export opportunities for Scotland. The importance of accelerating the transition to renewable energy sources, including hydrogen, has been brought into sharp relief by recent actions by Russia.
- With a commitment to supporting the development of Scottish supply chains and to working collaboratively with industry and international partners to develop hydrogen export markets, Scotland is uniquely placed to ensure security of supply of green hydrogen to the UK and Europe in future.

#### 4. Speaking note - Mr McKee - FOWT 22 Public Policy Panel Presentation - 16 May 2022

Event	Public Policy Panel at Floating Offshore Wind Turbines 2022 Conference in Montpellier
Date	16 May 2022
Time allocation	Up to 15 minutes

Slide 1	<p><b>Cover slide - welcome</b></p> <ul style="list-style-type: none"> <li>• Bonjour à tous - hello everyone. I'm delighted to be here in Montpellier and join you for Floating Offshore Wind Turbines 22.</li> <li>• I would like to speak to you today about the role of offshore wind in Scotland's net zero future and our support for floating offshore wind, including our work to support supply chain development through collaboration within the industry.</li> <li>• Scotland has some of the most challenging climate change targets in the world. With a commitment to net zero emissions by 2045, and the current highly unpredictable nature of gas and oil prices it is imperative to accelerate the development of alternative sources of energy.</li> <li>• Scotland's huge deep water potential means that we expect floating offshore wind to be vital in our transition to net zero. We already have a clear pipeline of projects throughout this decade and there is a significant pipeline of projects coming from the ScotWind offshore wind leasing round.</li> <li>• With this come huge economic opportunities for Scotland, in building our domestic offshore wind supply chain, providing opportunities for skills diversification and transferability from the Oil and Gas sector, and creating thousands of new high quality green jobs.</li> </ul>
Slide 2	<p><b>Policy Context</b></p> <ul style="list-style-type: none"> <li>• To start off, I will give you a brief overview of our targets and key policies that are guiding our work. We published our Sectoral Marine Plan in 2020, our Offshore Wind Policy Statement, which included the ambition for <b>8-11GW</b> of offshore wind capacity by <b>2030</b>.</li> <li>• The UK Government published its British Energy Security Strategy last month, which set a new target of <b>50GW</b> of offshore wind capacity by <b>2030</b>, and included <b>5GW</b> of floating offshore wind.</li> <li>• In addition to these current policies, we are publishing our Energy Strategy Refresh later this year, which will take a whole system view of energy and take account of the major policy and sectoral developments, including the outcome of the ScotWind leasing round.</li> </ul>
Slide 3	<p><b>ScotWind</b></p>



	<ul style="list-style-type: none"> <li>• ScotWind is the first devolved leasing round for offshore wind development in Scottish Waters, and the first leasing round in Scotland in a decade.</li> <li>• The map shows all lease areas of the ScotWind leasing round, as well as projects that are currently operational, in development, and under construction.</li> <li>• There were 17 successful bids out of 74 applications.</li> <li>• Option agreements for all 17 successful applicants were signed in April.</li> <li>• The level of ambition shown by the market recognises the seriousness of Scotland's commitment to achieving our net zero targets and economic growth.</li> </ul>
Slide 4	<p><b>Offshore wind pipeline</b></p> <ul style="list-style-type: none"> <li>• I would like to give you a brief overview of our current pipeline including the results of ScotWind.</li> <li>• We have just under 2GW of operational offshore wind, with a further approximately 4GW consented or in construction.</li> <li>• Scotland is also home to the world's first floating offshore wind farm, Equinor's 30 MW Hywind Scotland, and the recently completed 50 MW Kincardine Offshore Wind Project – the world's largest floating offshore wind farm.</li> <li>• In the table you can see an overview of the ScotWind winning bids, with the floating offshore wind projects highlighted in green.</li> <li>• The combined ambition of ScotWind projects is 25GW of generating capacity, which if approved, would deliver far in excess of our current planning assumption of 10GW of offshore wind.</li> <li>• The planning and consenting processes that lie ahead means it is not possible to know now exactly what scale of development will be permitted ultimately.</li> <li>• However, we are seeking to maximise the opportunities from ScotWind, for energy, the environment, the economy and our supply chain, albeit in a way that aligns with the marine planning framework.</li> <li>• 11 of the projects have said they will use floating technology with a combined ambition of 15GW of generating capacity– making it the largest scale floating offshore wind opportunity in the world.</li> </ul>
Slide 5	<p><b>Economic benefits</b></p> <ul style="list-style-type: none"> <li>• As well as the potential for radically increasing Scotland's offshore wind capacity, ScotWind presents huge economic opportunities.</li> <li>• £700 million will be generated in option fees that will go into the public purse for public spending and used to tackle the twin crises of climate change and loss of biodiversity. With billions more from rental fees when the projects are operational.</li> <li>• And developers have committed to invest in Scotland's economy and supply chain an average of £1.5 billion per project across the 17 ScotWind projects.</li> </ul>

	<ul style="list-style-type: none"> <li>This information was submitted by developers in their Supply Chain Development Statements which were required as part of the ScotWind leasing round application process.</li> </ul>
Slide 6	<p><b>Supply Chain Development Statements (SCDS)</b></p> <ul style="list-style-type: none"> <li>The leasing process was carefully designed and managed by Crown Estate Scotland, with respect to all applicable legal requirements, such as competition law and the EU-UK Trade and Cooperation Agreement.</li> <li>The SCDS was included to provide a structure for project specific supply chain information to be communicated with government and industry.</li> <li>In the SCDS, developers were required to outline their committed spend as well as ambition spend for Scotland over the development/construction and first 6 years of operations</li> <li><b>SCDS's were not scored</b> to ensure compliance with procurement regulations.</li> <li>The SCDSs outlooks have been made public with the signing of the Option Agreements this April, and can be accessed through Crown Estate Scotland's website.</li> <li>The slide shows a timeline for the SCDS process, as well as the contractual remedies for a decrease in project commitments.</li> <li>Any decrease in the project's commitments needs to be justified by the project.</li> <li>Developers will be subject to financial penalties for failure to deliver on their SCDS commitments, and where less than 75% of a developer's commitments have not been honoured, Crown Estate Scotland can withdraw the seabed lease.</li> <li>I should note that this process is separate from the Contracts for Difference Supply Chain Plans mechanism, which is managed by the UK Government, and remains the main route to market across the UK.</li> </ul>
Slide 7	<p><b>SCDS Commitment and Ambition</b></p> <p><b>Commitment</b></p> <ul style="list-style-type: none"> <li>Projects were asked to outline the minimum level of <b>commitment</b> to Scotland as part of the supply chain process</li> <li>Of the 17 successful ScotWind applications, there has been a combined "committed" supply chain expenditure of c£25bn in Scotland.</li> <li>The EU has a similar level of forecast spend, which is mainly due to manufacturing spend and the established EU supply chains in this area.</li> </ul> <p><b>Ambition</b></p> <ul style="list-style-type: none"> <li>Projects were also asked to estimate the total level of ambition for Scotland should the supply chain allow, i.e. further opportunities for manufacturing of components and establishing bases in Scotland.</li> <li>The 17 successful projects have outlined further ambitions of £11.1bn of offshore wind supply chain earmarked for Scotland.</li> <li>This shows the enormous potential for Scotland's economy and building our supply chain, and we are working to ensure we support the industry in realising these further ambitions.</li> </ul>

Slide 8	<p><b>INTOG</b></p> <ul style="list-style-type: none"> <li>• Before I move on to talk about the steps we are taking to support supply chain development for ScotWind, and floating wind in particular, I would like to mention another leasing round currently in progress in Scotland, The Innovation and Targeted Oil and Gas Decarbonisation offshore wind leasing round, better known as INTOG.</li> <li>• The INTOG leasing round will enable Innovation projects (up to a total of 500MW) to test new technology or solutions in Scottish waters, and secondly, Targeted Oil and Gas projects (up to 4 GW) that will specifically deliver green energy to oil and gas installations helping to decarbonise the oil and gas sector.</li> <li>• Targeting a total of 4.5GW of generating capacity, the vast majority of this will come from floating offshore wind technology to be delivered by the end of this decade.</li> <li>• Similarly to ScotWind, developers will be required to submit Supply Chain Development Statements in their applications.</li> <li>• INTOG is a key opportunity to replace traditional, polluting, energy sources with offshore wind generation and support the decarbonisation of the oil and gas sector and facilitate decommissioning.</li> <li>• Additionally, the knowledge and experience of the oil and gas sector, and its supply chain, will be a differentiator for Scotland in developing floating offshore wind technologies, and we are supporting skills diversification in this industry in line with our commitment to a Just Transition.</li> </ul>
Slide 9	<p><b>SOWEC</b></p> <ul style="list-style-type: none"> <li>• We recognise that we must work together to realise these ambitions for the offshore wind sector. As Co-Chair of The Scottish Offshore Wind Energy Council (SOWEC), I am leading on work to implement the five key recommendations in the Strategic Infrastructure Assessment (SIA), starting with the creation of a Scottish Floating Offshore Wind Port Cluster.</li> <li>• A key role for SOWEC is the implementation of the recommendations in the Strategic Investment Assessment (SIA), which was commissioned by SOWEC and led by Professor Sir Jim McDonald of Strathclyde University, with the main focus on creating a Scottish Floating Offshore Wind Port Cluster.</li> <li>• SOWEC has been identified by both industry and government as a key vehicle for taking forward the strategic supply chain opportunities that emerge from ScotWind.</li> <li>• The Scottish Government has been working together with industry to develop a Collaborative Framework which encourages all developers, the public sector and the supply chain to work together to maximise deployment of projects and supply chain opportunities.</li> </ul>
Slide 10	<b>Collaborative Framework Charter</b>

	<ul style="list-style-type: none"> <li>• I am pleased to share that we published the Offshore Wind Collaborative Framework Charter last week.</li> <li>• Developers have signed up to the charter, and this includes active developers in Scotland with 6.7GW of projects in the pipeline, and encompasses all ScotWind projects with a total of around 25GW they bring to the pipeline in Scotland.</li> <li>• This Charter builds on the 2021 Strategic Investment Assessment (SIA) adopted by the Scottish Offshore Wind Energy Council (SOWEC) recommendations, and is a clear way to support and enable developers' collective supply chain commitments. The Charter will help forge effective partnerships to deliver on the potential that offshore wind presents in the coming years.</li> <li>• The 24 developers, whose logos you can see in the presentation, will now work together with our support to review the pipeline of Scottish offshore wind projects and identify ways they can work together to maximise how they work with Scottish ports to share capacity and space and help underpin new investment.</li> </ul>
Slide 11	<p><b>Closing</b>  <i>Image of Nigg Energy Park</i></p> <ul style="list-style-type: none"> <li>• I'd like to thank you all for your time this morning, and I hope I have made clear to you the support that Scottish Government has for floating offshore wind, and particularly our ambitions for supply chain development.</li> <li>• We will continue to actively seek international collaboration in the development of our shared support for floating offshore wind commercial deployment and the policies, frameworks and technology that will drive it forward.</li> <li>• We see our development of commercial scale floating offshore wind as part of Scotland's role as a global climate change leader. The Scottish Government will do everything in its control to ensure that we deliver on our ambitious targets for this sector.</li> <li>• I wish you all a productive conference, and I will now hand you back over to Giles, who I will be happy to take questions from later in this session.</li> </ul>

## 5. Relevant Extracts from: T&I Ministerial Visits - France Visit Notes - 16-17 May 2022

### MEETING 1: Pre-Meet with Scottish Companies

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 09:15-10:00, Salle Jofre A
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• 18 Scottish Companies</li> <li>• [REDACTED], Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>• [REDACTED], International Inward Investment Specialist, SDI</li> <li>• [REDACTED], Senior International Trade Specialist – Energy and Low Carbon Transition, SDI</li> <li>• [REDACTED], Engagement Partner, International Visits, SDI</li> <li>• [REDACTED], Trade Policy, Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
<b>NOTES</b>	<p>Informal introduction for Scottish companies attending FOWT 2022. The session began with each company representative introducing themselves and what they wanted to get out of attending FOWT.</p> <p>[REDACTED] provided brief opening remarks and Minister followed by highlighting the importance of France from a trading nation perspective and how valuable renewables are to the vision for trade. Minister then wished companies best of luck for the conference programme and encouraged them to make connections and showcase Scotland's capabilities to prospective partners/customers.</p> <p>[REDACTED] then provided an overview of the conference programme and what companies could expect over the course of the 2 days in Montpellier.</p>
<b>ACTIONS</b>	n/a

### MEETING 2: Sophie Murlon, Director of Energy, French Government and officials

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 9.45-10.15, Salle Tibériade
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• Sophie Murlon, Directorate General for Energy and Climate of the Ministry of Ecological Transition, Director of Energy</li> <li>• [REDACTED], Trade Policy Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p>France is interested in the significant progress that Scotland has made in offshore wind. Historically France has developed offshore wind on a project by project basis. They are now looking at how they could take a larger-scale approach.</p> <p><u>Opportunity/discussion</u></p> <p>Mr McKee noted the work underway in Scotland to build the offshore wind supply chain, especially recognising the high level of supply chain investment commitments set out by the ScotWind bidders.</p> <p>Ms Murlon asked about the Scottish network capacity to receive wind energy as it is generated and Mr McKee noted that hydrogen provides an opportunity for energy storage and transportation.</p> <p>France remains interested in the production of biogas, to a larger degree than Scotland, but will seek to avoid dedicated crops. Mr McKee noted the innovative work that is underway in Scotland to develop biofuels from waste products.</p> <p>On hydrogen, France is focussing on domestic production rather than import and Ms Murlon noted that this was a different strategy to the German approach.</p> <p>Responding to Mr McKee's comments about the Scottish focus on export, she reflected on the importance of engaging with the European regulation and certification processes to ensure that provenance is clear and that Green Hydrogen meets the required standards. She also noted the ambitions of Denmark in hydrogen export.</p>

	<b>[REDACTED]</b>  On nuclear fusion and the innovative ITER project, Ms Murlon suggested commercial output not likely until much later this century.
<b>ACTIONS</b>	<b>[REDACTED]</b>

### MEETING 3: Plenary Session at FOWT 2022

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 10:30-12:00, Auditorium, Le Corum
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>Giles Dickson, CEO of Wind Europe (Moderator)</li> <li>Sophie Murlon, Directorate General for Energy and Climate of the Ministry of Ecological Transition, Director of Energy</li> <li>Kazuyuki Imazato, NEDO (New Energy and Industrial Technology Development Organization) Europe, Special Advisor Minister's Secretariat, METI, the Japanese Government, &amp; Director General</li> <li>Elisabeth Sæther Norwegian Ministry of Petroleum and Energy State Secretary (joined the panel virtually)</li> </ul>
<b>NOTES</b>	<p>Each representative from the four countries delivered opening remarks focused on public policies in offshore wind, the opportunities for collaboration between respective countries.</p> <p>Mr McKee's presentation focused on Offshore Wind policy framework and ambitions, in which he provided offshore wind policy context and an update on the ScotWind projects and the Offshore Wind Collaborative Framework Charter which has been signed by 24 developers and encompasses the 17 ScotWind projects. Mr McKee also outlined the objectives of SOWEC and opportunities for Scottish supply chain. He concluded that Scotland continues to seek international collaboration in the development of shared support for floating offshore wind commercial deployment, frameworks and technology that will drive it forward.</p> <p>After each speaker provided their opening remarks, Giles Dickson moderated a Q&amp;A with panelists. Questions directed to Mr McKee were around plans for supply chain in Scotland (given most of the audience were developers/manufacturers and keen to hear about plans), engagement with fisheries as they are vital to marine planning, licensing and consenting work and if Scotland is going to set targets for floating offshore wind. Minister responded on each of the points and there were no specific follow up/actions from this panel session.</p>
<b>ACTIONS</b>	n/a

### MEETING 4: MoU signing between DeepWind & Wind OCC at FOWT 2022

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 12:30-13:00, Sully 2
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>Marie-Laure Barois, Co-Founder, Wind'Occ</li> <li>Jalil Benabdillah, Vice-President of Occitanie with responsibility for Economy, Employment, Innovation and Reindustrialisation</li> <li><b>[REDACTED]</b>, DeepWind Cluster Manager</li> <li><b>[REDACTED]</b>, Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li><b>[REDACTED]</b>, International Inward Investment Specialist, SDI</li> <li><b>[REDACTED]</b>, Senior International Trade Specialist – Energy and Low Carbon Transition, SDI</li> <li><b>[REDACTED]</b>, Engagement Partner, International Visits, SDI</li> <li><b>[REDACTED]</b>, Trade Policy, Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p><b>[REDACTED]</b> provided an overview in French of how the MoU signifies collaboration on offshore wind and hydrogen development between Scotland France.</p> <p>Mr McKee then provided some opening remarks about how Scotland is delighted to partner with Occitanie region and how this partnership and collaboration will give Scottish businesses opportunities</p>

	to access and partner with business in France and vice versa. [REDACTED] echoed what Mr McKee said and that it was an excellent opportunity for cooperation in emerging offshore wind technologies which are so important in Occitanie and Scotland moving forward. A <a href="#">press release</a> was issued after MoU signing to domestic and international media and gained excellent coverage on social channels.
<b>ACTIONS</b>	n/a

## MEETING 5: Meeting with Jalil Benabdillah, Vice-President of Occitanie and David Decrock

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 13:10-13:20, Sully 2
<b>ATTENDEES</b>	[REDACTED], Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI
<b>NOTES</b>	Mr McKee and Mr Benabdillah both welcomed the signing of the MoU. They set out the other regional strengths of their respective areas: Food & Drink (Occitanie is the largest French wine producing region), aerospace (1 <sup>st</sup> French region) & Life Sciences. Scotland is taking work forward on nano-satellites. Occitanie is the only French region to have an overseas network ('La Maison de la Région'), with offices in Shanghai, London, New York and Casa Blanca providing economic support and market access work.
<b>ACTIONS</b>	[REDACTED]

## MEETING 6: Meeting with Qair France

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 13:30-14:15, Salle Jofre A
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• Louis Blanchard: President of Qair International SAS</li> <li>• Albert Juanola Freixas: Offshore Wind Business Development Director, Qair Group</li> <li>• Ian Taylor: Project Development Director Thistle Wind Partners (partnership Qair; DEME ; Aspiravi for ScotWind)</li> <li>• [REDACTED]: Project Manager, DeepWind</li> <li>• [REDACTED], Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>• [REDACTED], International Inward Investment Specialist, SDI</li> <li>• [REDACTED], Senior International Trade Specialist – Energy and Low Carbon Transition, SDI</li> <li>• [REDACTED], Engagement Partner, International Visits, SDI</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p>Albert provided an overview of Qair's current projects and commended Scotland on how efficient the ScotWind process was from a developer's perspective. Louis advised that Qair's main focus is on green hydrogen and offshore wind, in Europe and in Brazil. Qair opened Scottish office after having acquired a small onshore consulting firm in Edinburgh end of 2021.</p> <p>Ian, representing Thistle Wind Partners (TWP) consortium provided a presentation to Mr McKee and SDI officials, which highlighted TWP focus on port infrastructure and supply chain using Port La Nouvelle in France as an example where they have a quay for launching floaters and assembly quay for supply of components. Louis and Jerome then highlighted their aims for green hydrogen production at Port La Nouvelle by 2023.</p> <p><u>Opportunity/discussion</u></p> <p>All three representatives agreed that whilst the energy transition is moving at pace, they are well supported by Scotland, which Mr McKee was reassured to hear. [REDACTED]</p> <p>Mr McKee asked Qair if there was anything more Scotland could do in terms of support. The three representatives agreed the current challenge is that many developers have yet to crystallise their offshore floating technologies and thus need more time.</p>

	However Qair are of the opinion being one of the first should help them get on the grid faster. In terms of fisheries, Qair representatives were keen to understand how fisherman can get involved, particularly as they have an important part to plan in any planning, licensing and consenting work. Mr McKee advised representatives that Scottish Government and SDI are always happy to help and to plug any gaps with Scottish capabilities.
<b>ACTIONS</b>	<b>[REDACTED]</b>

### MEETING 7: Meeting with Daniel Cueff, VP of Brittany Region

<b>DATE</b>	16 <sup>th</sup> May 2022 ,14.30-15.15, Salle Joffre A
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• Interpreter: <b>[REDACTED]</b></li> <li>• Daniel Cueff, VP of Brittany Region</li> <li>• Philippe Thieffry, Project Coordinator, Bretagne Ocean Power</li> <li>• Jean-Michel Lopez, Deputy Director General, Brittany Region</li> <li>• <b>[REDACTED]</b>, Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>• <b>[REDACTED]</b>, Trade Policy Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p><b>[REDACTED]</b> noted that Scotland was well advanced with the development of hydrogen capacity. Brittany is keen to collaborate on the decarbonisation of shipping and eco-ports. In particular they are considering how they can decarbonise the ports of St Malo, Brest and Lorient. Mr McKee expressed his interest in these projects and set out Scotland's strengths in the decarbonisation of transport, both through electrification and through the use of hydrogen.</p> <p><u>Opportunity/discussion</u></p> <p>In particular, Brittany proposed two areas of cooperation:</p> <p><b>[REDACTED]</b></p>
<b>ACTIONS</b>	<b>[REDACTED]</b>

### MEETING 8: Meeting with Ponticelli

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 15:30-16:00, Salle Joffre A
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• Vincent Ladougne ,Global Business Development Director, Ponticelli</li> <li>• <b>[REDACTED]</b>, Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>• <b>[REDACTED]</b>, International Inward Investment Specialist, SDI</li> <li>• <b>[REDACTED]</b>, Engagement Partner, SDI</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p>Vincent provided an overview of Ponticelli's current projects as a manufacturer and outlined potential for a production facility in Scotland where steel floaters for offshore wind turbines would be assembled.</p> <p><u>Opportunity/discussion</u></p> <p>Mr McKee outlined that ScotWind projects will require 500+ floaters and foundations which represents huge potential for Ponticelli and their development in Scotland.</p> <p>Vincent agreed but highlighted the challenges around timelines and developers' order, given they have yet to decide the technology to use, so until developers do so, Ponticelli can't move forward with plans.</p> <p>Mr McKee then asked Vincent if Ponticelli was connected to developers and he said not at the moment as they are still thinking about the supply chain Mr McKee advised SG/SDI would be happy to connect Ponticelli. However, Vincent did advise they would have to manufacture locally which has additional advantages such as tapping in local supply chain and skills/talent in Scotland.</p>



	<p>Vincent also expressed an interest in the Green Ports, results of which will be announced after summer.</p> <p><b>[REDACTED]</b></p> <p><b>[REDACTED]</b> offered Vincent and his team a site visit to Scotland in the near future, which he seemed very interested in doing.</p>
<b>ACTIONS</b>	<b>[REDACTED]</b>

## MEETING 10: Meeting with BW Ideol

<b>DATE</b>	Monday 16 <sup>th</sup> May 2022, 17:15-18:00, Salle Jofre A
<b>ATTENDEES</b>	<ul style="list-style-type: none"> <li>• Steve Regan, Owner Ardersier Port</li> <li>• Bruno Geschier, Chief Sales and Marketing Officer BW Ideol</li> <li>• Paul de la Guérivière, CEO BW Ideol</li> <li>• <b>[REDACTED]</b>, Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>• <b>[REDACTED]</b>, International Inward Investment Specialist, SDI</li> <li>• <b>[REDACTED]</b>, Trade Policy Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
<b>NOTES</b>	<p><u>Introduction</u></p> <p>CEO, Paul introduced BW Ideol's approach to manufacturing floaters, <b>[REDACTED]</b></p> <p>Independent research suggests that commercial scale wind farm development would produce 3,700 jobs.</p> <p><u>Opportunity</u></p> <p>Steve set out the opportunity presented <b>[REDACTED]</b></p> <p><b>[REDACTED]</b></p> <p><u>Wider Discussion</u></p> <p>Mr McKee asked about labour and skills availability and Steve was confident this could be achieved by providing high quality jobs.</p> <p>Bruno noted that Scotland's launch of ScotWind provided enough confidence and long term opportunity for businesses to develop long term, sustainable projects at scale. <b>[REDACTED]</b></p> <p>Paul noted that a major challenge was the timing of grid connection, which does not necessarily align with when projects will be ready on the group. He suggested that the order of priority for connection must be aligned with the maturity of the project. Bruno noted that the BW Ideol plans were well developed, with no risk of supply chain/ port bottle necks, unlike other more speculative proposals.</p> <p>Steve referred to the 2020 Arup Study: Ports for Offshore Wind, which projected significant increase in demand. Since then, two key changes: hydrogen and the decarbonisation of manufacturing. Port capacity will be a key issue.</p> <p>Paul stated that BW Ideol was now focussed on supply chain development. <b>[REDACTED]</b></p> <p>Bruno was keen to understand whether local content would be a key part of future leading rounds. Mr McKee stated that there was not currently a decision on this, though strong local supply chains are the priority.</p> <p><b>[REDACTED]</b> noted that SDI was seeking to encourage Scottish suppliers to access international supply chain opportunities and set out SDI's offer of help.</p>

	<p>Paul noted that Scotland was in a strong position for investment, vis a vis, for example, France, as ScotWind had provided a powerful, long term commitment from government. BW Ideol saw Scotland as a world leader in this space and ScotWind has enabled businesses to continue to develop in the supply chain with a realistic prospect for future development. [REDACTED]</p> <p>[REDACTED] asked whether BW Ideol was developing a UK presence and offered support to do this in the future. They are not yet at this point.</p>
ACTIONS	[REDACTED]

## LOCATION 2 – PARIS

### MEETING 15: Meeting with H2V Industry

DATE	Tuesday 17 <sup>th</sup> May, 11:45-12:30, British Embassy, Paris
ATTENDEES	<ul style="list-style-type: none"> <li>Yannick Bonin, Director of Hydrogen Development, H2V</li> <li>Jean Philippe Oliver, Managing Director, Samfi Invest (one of H2V's key shareholders)</li> <li>[REDACTED], Country Head – France, EMEA Team leader Trade – Energy and Low Carbon Transition, SDI</li> <li>[REDACTED], Trade Policy Climate &amp; Sustainability, DITI, Scottish Government</li> </ul>
NOTES	<p><u>Introduction</u></p> <p>Jean Philippe set out background information on the Samfi holding company. Their portfolio gives them a strong insight into the interconnected markets of freight, renewables and hydrogen. They have over 2,500 employees and 1,500 HGVs operating mainly in France. They also have real estate and self-storage branches.</p> <p><u>Current projects</u></p> <p>Since 2000, the company has been investing in renewables, including now 1 GW of wind projects in Switzerland and with Engie. Solar power was developed from 2006 onwards, with the initial development sold to Octopus (UK energy company) in 2014.</p> <p>Since 2016, they have been developing their hydrogen proposals. Primary aims are:</p> <ul style="list-style-type: none"> <li>- Facilitate the infrastructure necessary for hydrogen</li> <li>- Achieve green parity in terms of cost point.</li> </ul> <p>Their Normandy project is currently the largest hydrogen development internationally. Primary focus of capital expenditure and studies is on green hydrogen. They recognise that there will be industrial applications, but that the key focus will be on mobility in the longer term.</p> <p>Yannick stated that because of the scale of the company, they are not waiting for government subsidies, [REDACTED]</p> <p><u>Opportunity</u></p> <p>[REDACTED]</p> <p>Mr McKee set out Scotland's inward investment strengths in decarbonising transport, decarbonising chemicals industry and low carbon energy, all of which align well with the H2V profile and also Scotland's hydrogen strengths (including transport, waste collection, domestic heat and industry). He noted that the hydrogen economy is at the forefront of our thinking and that the Hydrogen Action Plan has set out the scale of Scotland's ambition. ScotWind leasing round has demonstrated the scale of Scotland's ambition, with a huge, proposed hydrogen offtake. He noted that Scotland was in discussion with German Länder about export opportunities.</p> <p>He asked H2V about how we transition from grey to green hydrogen, focussing on technology, price and supply chain. He further asked about the likely evolution of the hydrogen price point.</p>

	<p>Jean Philippe noted that there are several different markets for hydrogen:  Green hydrogen    big industry    EUR 1.50/ kilo in 2021 (perhaps EUR2-2.50 now)  Mobility            EUR 4 / kilo in 2021 (has risen).</p> <p>In hydrogen production projects the cost can be over EUR 10 / kilo, with subsidies: price is heavily dependent on cost of electricity and offshore wind. For mobility, it is easier for hydrogen to become cost-competitive without subsidy. For industry, subsidies are necessary.</p> <p>Jean Philippe set out the industrial hydrogen production model. He noted that the cap ex for hydrogen projects was relatively low: efficiency and ensuring optimal production across the year is key: 70% of the cost of hydrogen production is electricity.  This is where they felt that France has an edge with reliable, low-cost nuclear power. Offshore wind, conversely, presents a risks to the number of operating hours.</p> <p>Mr McKee noted that with the grid as a customer, windfarms often needed to deal with intermittency by finding a way to store excess production – and this is where hydrogen has a role to play.</p> <p>Jean Philippe however recognised intermittency as a concern. He set out the dynamic between hydrogen for mobility and hydrogen for industry. By 2040, we know that industry will have needed to drastically scale up hydrogen consumption: subsidies will be needed. Mobility/ freight, however, should become price competitive and the cost/ rate of converting to hydrogen vehicles should be achievable.</p> <p><b>[REDACTED]</b></p> <p><b>[REDACTED]</b> noted Scotland’s strength in this sector and that SDI could provide introductions across industry. He also noted that Scotland is on course to be a net exporter of green energy.</p>
<b>ACTIONS</b>	<b>[REDACTED]</b>

## 6. T&I Visit to France - Minister BTTE - Visit Report - May 2022

### REPORT OF VISIT TO FRANCE, 16-17 MAY 2022

Minister for Business, Trade, Tourism and Innovation

I visited France between the 16-17<sup>th</sup> of May 2022, coinciding with Scottish Development International (SDI) and Scottish companies attending the Floating Offshore Wind Turbines (FOWT) conference in Montpellier.

France features within *A Trading Nation's* top 3 priority countries and was Scotland's 2<sup>nd</sup> largest export destination in 2019, with exports worth £2.9 billion. This is 8.3% of all international exports from Scotland and was an increase of 3.6% (£100 million) from 2018, when it was worth £2.8 billion. Scotland's largest export sectors to France were Food & Drink (£1.014 billion in 2021), Financial & Business Services (£545m) and Engineering & Advanced Manufacturing (£490m).

In terms of FDI, there were 160 French-owned businesses in Scotland, with a total reported turnover of almost £7.9 billion (as of March 2021).

My two-day visit was built around a programme of inward investor and key business stakeholder engagements, including GlobalScots, as well as meeting with Ile de France tourism. Net zero and energy, particularly offshore wind, were the key themes of this trade & investment focussed visit. I had a number of opportunities to promote Scottish sectors' strengths in France during this visit:

- a. at the Floating Offshore Wind Turbines (FOWT) plenary session, where I presented our Offshore Wind policies and ambitions, updated on ScotWind projects and outlined opportunities for Scottish supply chain;
- b. [REDACTED]

This visit provided me with opportunities to contribute to retaining the confidence of French investors in Scotland and build confidence within the French public sector ([REDACTED]) towards innovative technology exports from Scotland. I met with 4 businesses in the renewables and hydrogen sectors, strengthening Scotland's reputation and supporting SDI work to attract investment in Scotland and Scottish supply chains. I also took the opportunity to welcome and reiterate our support to 15 Scottish companies who took part in a SDI trade programme during FOWT.

I was able to engage with the Vice-Presidents of Occitanie and Brittany, strengthening the Scottish Government (SG) France Office and SDI's outreach work in these regions. It was useful to further explore mutual ambitions and partnership opportunities, in areas like decarbonisation of shipping and aerospace. I also gained valuable insights into Green Hydrogen production and export from a French government perspective during a meeting with Director for Energy, Ministry for the Ecological Transition, Sophie Murlon.

[REDACTED]

The visit was beneficial in underlining our commitment to France with a focus on trade and investment. It enhanced relations with the business community and made way for greater collaboration on policy and trade fronts.

## KEY OUTCOMES

- Emphasis of Scotland's commitment to maintaining strong trade and investment relationships with France, despite challenges posed by Brexit.
- Enabled SDI to build on their rapport with important French investors to Scotland, and to raise our profile with companies and stakeholders interested in Scottish/French business relations.
- Explored the experience of French investors in Scotland, the challenges they face and knowledge-exchange. Identifying these challenges will enable us to make improvements to the current situation.
- **[REDACTED]**
- **[REDACTED]**
- Identified areas of mutual interest and potential partnership between Scotland and French regions, particularly around decarbonisation of transport (in freight and fishing - Brittany) and energy, aerospace and life sciences (Occitanie).
- Promoted Scotland as an innovative partner and a great place to do business.

## GOVERNMENT MEETINGS

- Meeting with Sophie Murlon, Director for Energy, French Government
- Meeting with Jalil Benabdillah, Vice-President of Occitanie
- Meeting with Daniel Cueff, Vice-President of Brittany
- **[REDACTED]**
- **[REDACTED]**

## OTHER ENGAGEMENTS, VISITS AND MEETINGS

- Meeting with Scottish companies attending FOWT
- Participation in FOWT Plenary Session
- Witnessed signing of MoU between DeepWind and Wind OCC
- Meeting with Qair France
- Meeting with Ponticelli
- **[REDACTED]**
- Meeting with BW Ideol
- **[REDACTED]**
- Meeting with SDI / SG France Team
- Meeting with H2V
- **[REDACTED]**

## ANNEX A: Proposed copy list

Proposed copy List	For Action	For Comments	For Information		
			Portfolio Interest	Constit Interest	General Awareness
First Minister			x		x
Deputy First Minister			x		x
Cabinet Secretary for Culture, Tourism and External Affairs			x		x
<p>Cabinet Secretary for Finance and the Economy Cabinet Secretary for Net Zero, Energy and Transport</p> <p>Communications Finance and Economy DG Constitution and External Affairs DG Economy Kate Higgins, Special Adviser</p> <p>Richard Rollison, Director for International Trade and Investment James McLellan, Trade &amp; Investment Delivery Deputy Director [REDACTED], Head of Trade Promotion [REDACTED], Trade Promotion Team Leader [REDACTED], Trade Promotion Team Leader [REDACTED], Trade Promotion Policy Officer [REDACTED], Head of Inward Investment [REDACTED], Inward Investment Team Leader [REDACTED], Inward Investment Team Leader [REDACTED], Head of Trade Support [REDACTED], Trade Support Team Leader [REDACTED], Trade Support Team Leader David Barnes, Trade Policy Deputy Director [REDACTED], Head of Trade Strategy [REDACTED], Climate &amp; Sustainability Team Leader [REDACTED], Investment Finance Deputy Director [REDACTED], Head of Capital Investment Policy and Pipeline [REDACTED], People and Communication</p> <p>Scott Wightman, Director for External Affairs Frank Strang, European Relations Deputy Director [REDACTED], Head of European Engagement [REDACTED], Deputy Head European Engagement [REDACTED], Head of SG Office Paris [REDACTED], Head of Strategic Communications – External Affairs [REDACTED], Deputy Head International Communications</p> <p>Colin Cook, Director for Economic Development [REDACTED], Head of Tourism and Hospitality Policy and Strategy Andrew Hogg, Energy Industries Deputy Director [REDACTED], Head of Offshore Renewables Policy &amp; Supply Chain Stuart Greig, Director of Low Carbon Economy Kersti Berge, Director of Energy and Climate Change</p>					

Neil Francis, SDI, Interim Managing Director, [REDACTED]@scotent.co.uk  
Jan Robertson, SDI, Interim Director Global Trade, [REDACTED]@scotent.co.uk  
Mark Hallan, SDI, Director Global Investment, [REDACTED]@scotent.co.uk  
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Adrian Gillespie, CEO Scottish Enterprise, [REDACTED]@scotent.co.uk





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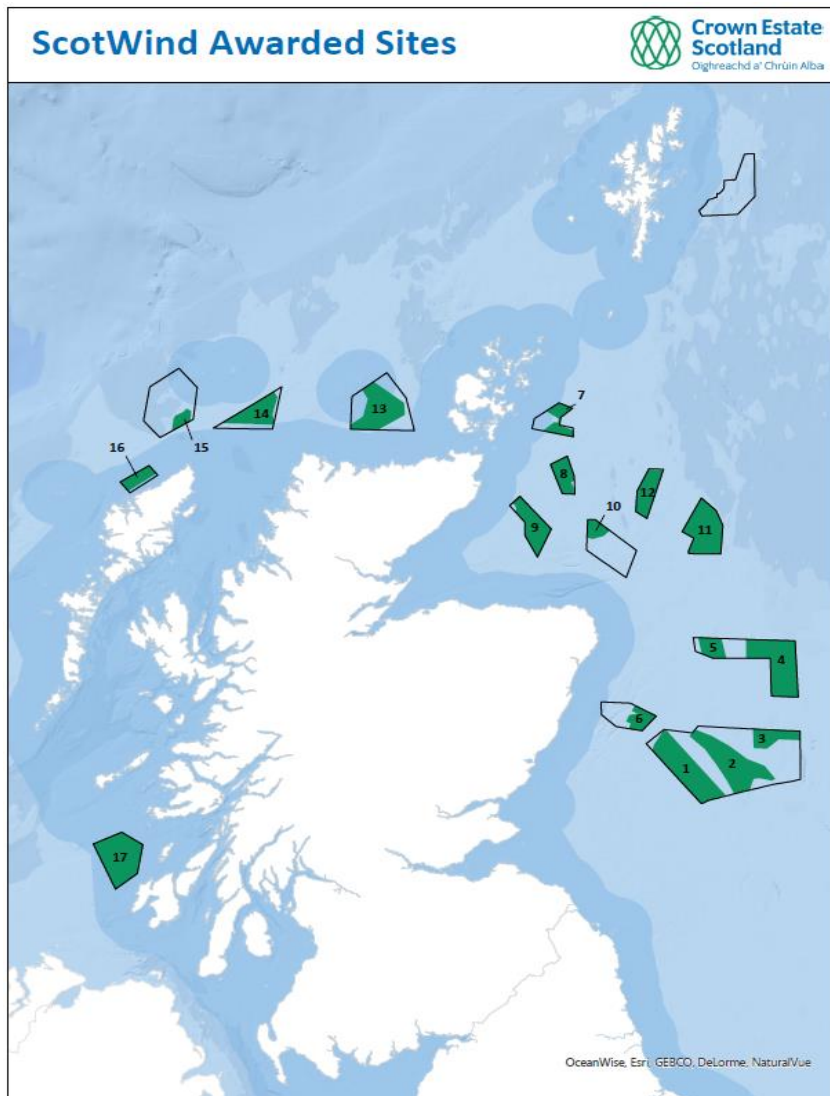
# Offshore Wind in Scotland:

Offshore wind policy framework and ambitions

Ivan McKee MSP, Minister for Business, Trade, Tourism and Enterprise, Scottish Government



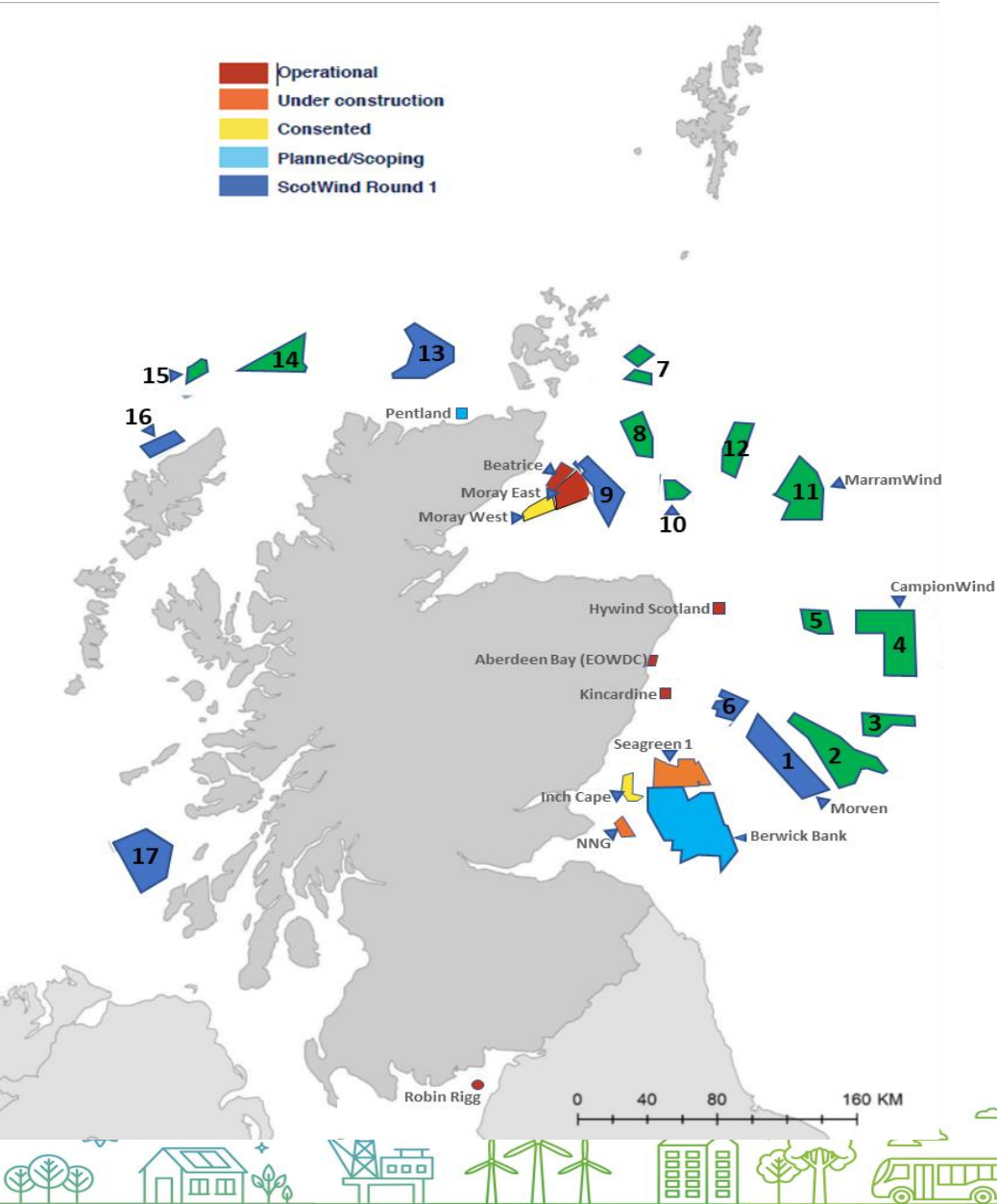




- 17 projects selected out of a total of 74 applications
- The 17 projects are across 14 sites in Scottish waters
- One lease area in clearing process, expected to conclude later this year
- Combined capacity of 24.85GW, with **15GW from floating offshore wind**
- **11 of the projects will use floating technology** – making it the largest scale floating offshore wind opportunity in the world



# Scotland's Offshore Wind Pipeline



## Floating Offshore bid in Green

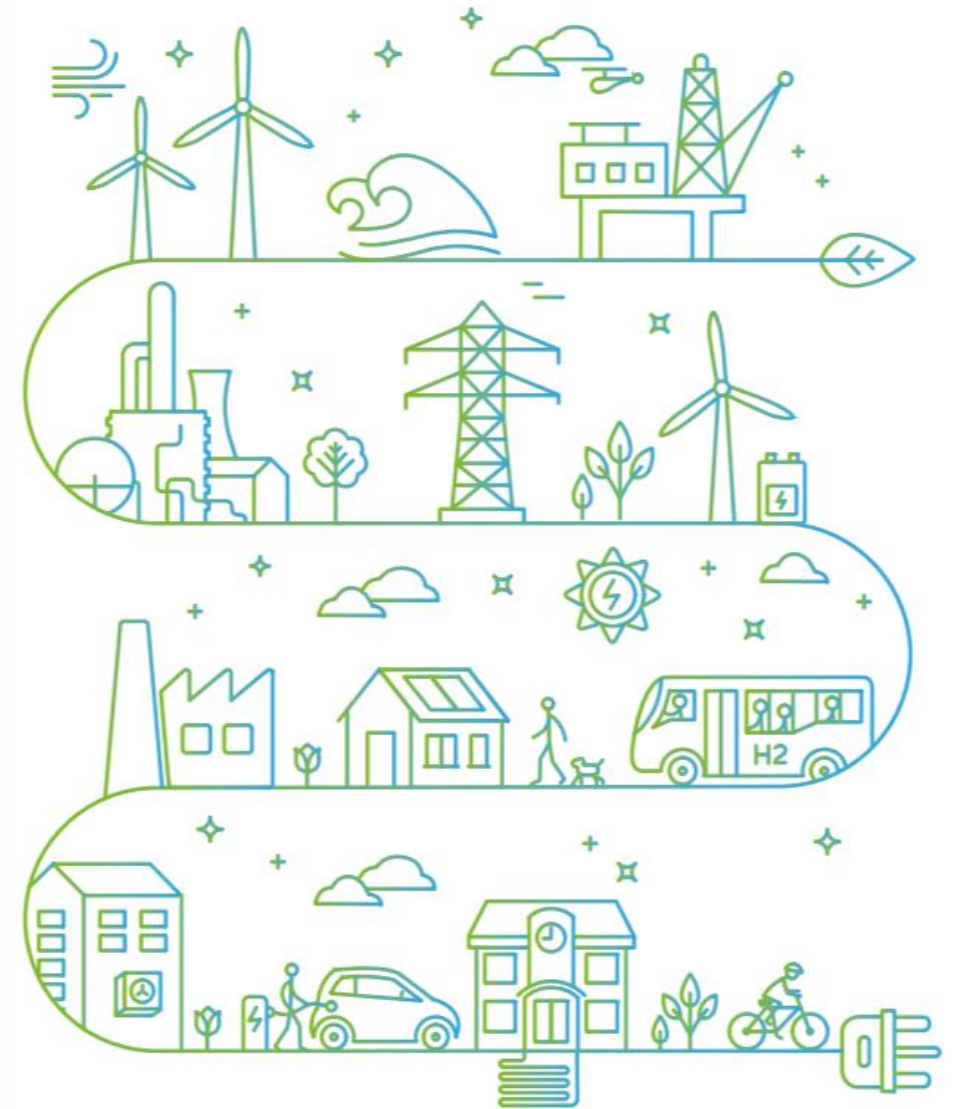
SITE	DEVELOPERS	CAPACITY
1	BP and EnBW	2,907MW
2	SSE Renewables, CIP and Marubeni	2,610MW (FOW)
3	Falck Renewables and BlueFloat Energy	1,200MW (FOW)
4	Shell and ScottishPower Renewables	2,000MW (FOW)
5	Vattenfall and Fred Olsen Renewables	798MW (FOW)
6	DEME, Aspiravi and Qair	1,008MW
7	DEME, Aspiravi and Qair	1,008MW (FOW)
8	Falck Renewables, Orsted and BlueFloat Energy	1,000MW (FOW)
9	Ocean Winds	1,000MW
10	Falck Renewables and BlueFloat Energy	500MW (FOW)
11	Shell and ScottishPower Renewables	3,000MW (FOW)
12	Floating Wind Alliance (Baywa r.e., Elicio and BW Ideol)	960MW (FOW)
13	RIDG, GIG and TotalEnergies	2,000MW
14	Northland Power	1,500MW (FOW)
15	Magnora ASA and Technip UK	495MW (FOW)
16	Northland Power	840MW
17	ScottishPower Renewables	2,000MW





# Economic and supply chain benefits

- **£700m** generated in option fees for public spending
- **Billions more** in public benefit via the investment of rental revenues
- **£1.5bn per project** average investment in Scotland
- Supply Chain Development Statements submitted as part of application process
- Developers will be held to account on their SCDS or will face range of penalties



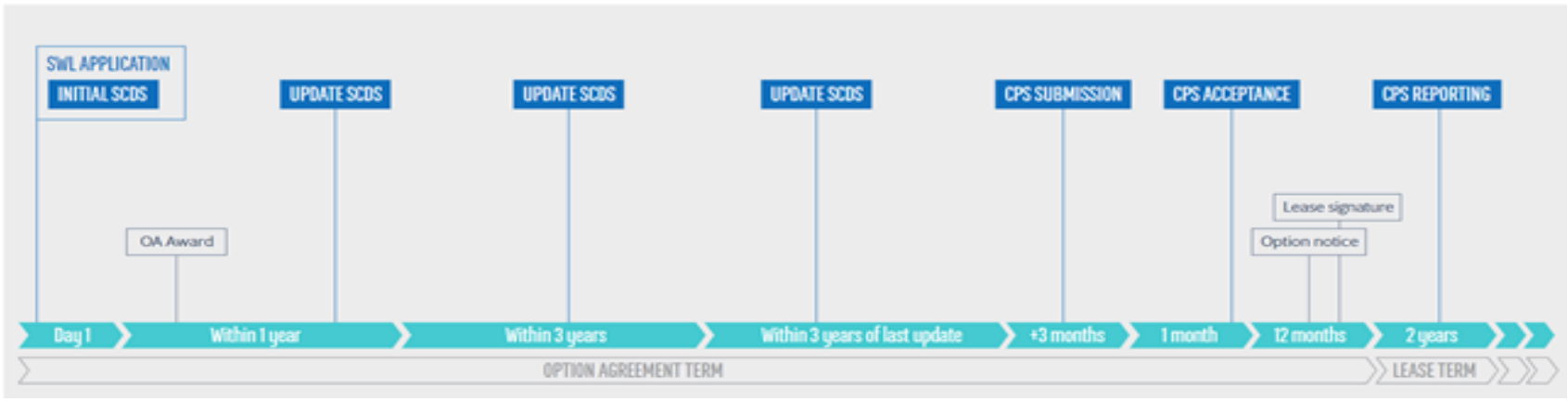
The SCDS for the 17 successful applications included an estimated total level of committed spend in Scotland of c£25bn, an average of £1.5bn per project.

**Projects were required to submit a SCDS as part of their ScotWind bid.**  
The submission included an Outlook (summary) and full SCDS plus narrative. Developers were required to outline the level of both committed spend and ambition over the development, construction and operation phases (first 6 years) of the project in Scotland, rest of the UK, EU and rest of the world.

**The SCDS was not scored as part of the ScotWind evaluation process.**  
However, the commitments are included within the Option Lease Agreement (OLA). Developers are required to update the SCDS within 12 months of signing the OLA and every 3 years from OLA to Lease. They can update as many times as preferred within this 3-year period but required to, at least once.

**The Contracted Position Statement (CPS) is submitted in advance of stepping into Lease.**  
The CPS includes demonstration of expenditure incurred or contracted. Crown Estate Scotland will assess any variance between the final SCDS and the CPS and advise on acceptance. Contractual remedies are triggered on the following basis:

Percentage of Commitment expenditure that is demonstrated by CPS when lease is requested	Contractual remedy
100% or more	No remedy
90% or above and less than 100%	Payment by applicant of £50k
50% or above and less than 90%	Payment by applicant of £100k
25% or above and less than 50%	Payment by applicant of £250k
Less than 25%	Lease may not be requested



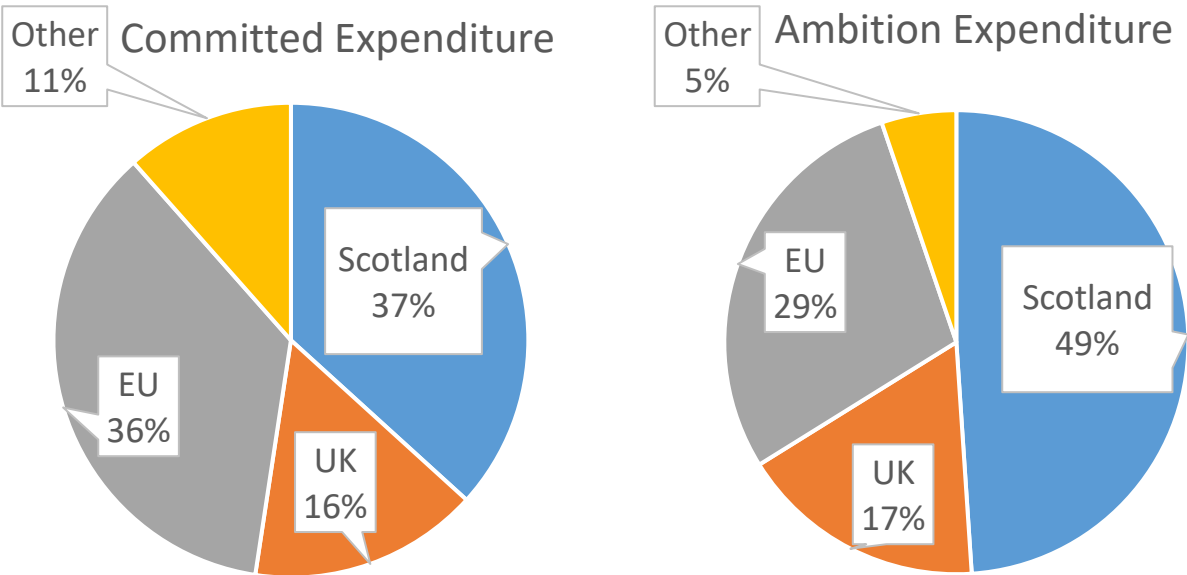
## Commitment

As part of their ScotWind bid, projects were asked to outline expenditure commitment over the development, construction and operation phases (first 6 years) of the project, through the SCDS process, split in regions as shown.

	Commitment (£bn)	Ambition (£bn)
Scotland	25.5	36.6
UK	10.9	12.9
EU	25.0	21.4
Other	8.0	3.9
Total	69.4	74.8

## Ambition

Projects were also asked to estimate expenditure ambition over the relevant phases of the project. The 17 successful projects have outlined further ambitions of £11.1bn of offshore wind supply chain earmarked for Scotland which amounts to 49% of the total overall ambition.



# Innovation and Targeted Oil and Gas (INTOG)

Innovation  
(500MW)

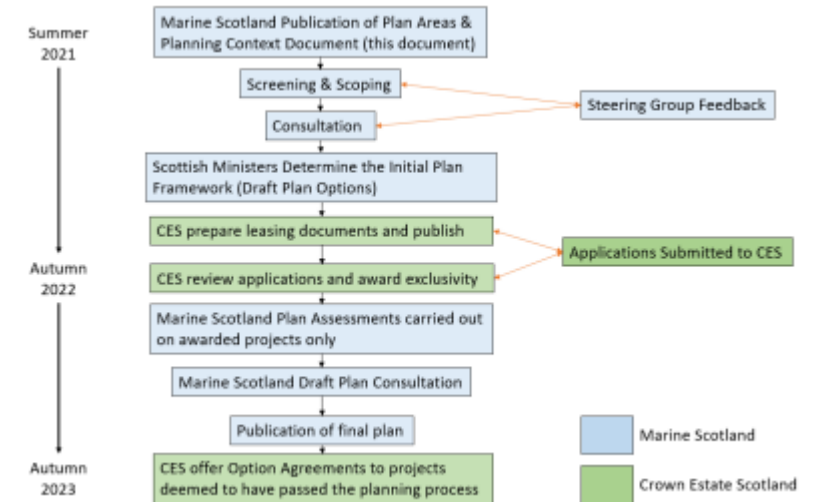
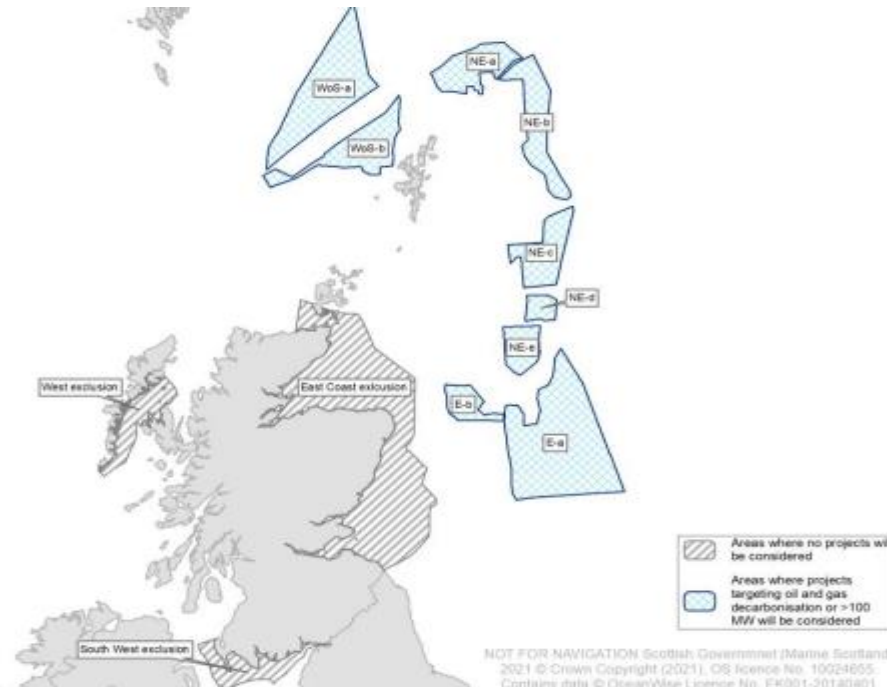
- To enable projects which support cost reduction in support of commercial deployment of offshore wind including alternative outputs such as Hydrogen.
- To further develop Scotland as a destination for innovation and technical development which will lead to risk reductions and supply chain opportunity

Targeted O&G  
(4GW)

- To maximise the role of offshore wind to reduce emissions from oil and gas production.
- To achieve target installed capacity in a way that delivers best value for Scotland, creating supply chain opportunity in alignment with Just Transition principles.



## Initial Plan Framework Sectoral Marine Plan for Offshore Wind for Innovation and Targeted Oil and Gas Decarbonisation (INTOG)



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## SOWEC

SOWEC has been identified by both industry and government as a **key vehicle for taking forward the strategic supply chain opportunities that emerge from ScotWind.**

## Role

A key role for SOWEC is the **implementation of the recommendations in the Strategic Investment Assessment (SIA)**, which was commissioned by SOWEC and led by Professor Sir Jim McDonald of Strathclyde University.

## Collaborative Framework

The primary recommendation focusses on bringing the manufacturing of floating offshore wind platforms to Scotland through creation of a **Scottish Floating Offshore Wind Port Cluster**, with ports acting in partnership to provide the required infrastructure area and capability needed to attract manufacturers to use Scottish ports and invest in Scotland.

The SIA identified that there is a lack of information sharing between ports/yards and concluded that SOWEC industry members should explore using a Collaborative Framework to support and underpin port investment to create a Scottish Floating Offshore Port Cluster. SOWEC has been coordinating sector discussion around the need for this Collaborative Framework and has now published the **Offshore Wind Collaborative Framework Charter.**





# Offshore Wind Collaborative Framework Charter



- Announced by First Minister on 11 May
- Signed by 24 developers, includes all active developers in Scotland and encompasses all of the 17 ScotWind projects.
- The 24 developers signed up to this Charter will now work together to review the pipeline of Scottish offshore wind projects and identify ways they can work together to maximise how they work with Scottish ports to share capacity and space and help underpin new investment.



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