

Offshore Wind Supply Chain Study Outline Recommendations

What we want to see:

- Offshore wind market assessment
 - Overview of Tier 1, 2, and 3 components
 - What are the manufacturing requirements for these components?
 - Where are these components currently manufactured?
 - Landscape of existing and announced supply chain at regional and national levels
 - Are there key manufacturing deadlines SC manufacturers and decision-makers need to prepare for?
 - **What component needs are currently unmet?**
- Assessment of South Carolina's existing supply chain
 - **What infrastructure does SC have to support industry needs that are currently unmet?**
 - Overview of existing facilities and attributes of SC's manufacturing ecosystem
 - Materials, advanced manufacturing expertise, or specialized labor prevalent in SC
 - Include ports assessment suitability for manufacturing
 - Landscape overview of SC companies that currently support the OSW industry
 - Landscape overview of SC companies that could transition into the industry if given support (training, funding, etc.)
- Estimation of potential economic impact
 - Model economic benefits (local revenue generated, private sector investment, jobs created, etc.) that the offshore wind supply chain can provide to SC
 - How many workers does the offshore wind supply chain currently employ in South Carolina? How many workers COULD be employed?
 - What could the total economic benefit be as a result of SC manufactured products supplying various US projects?
 - What could the total economic benefit be as a result of SC supplying components to the Carolina Long Bay projects?
- Recommendations and next steps
 - Actionable recommendations for supporting existing businesses or recruiting new members of the supply chain
 - Market, policy, R&D, and investment recommendations
 - Identification of components (all tiers) most advantageous for SC to focus manufacturing efforts
 - Which agency is in charge of carrying out each recommendation?
 - Specific plans to engage Small Minority- or Women-Owned Businesses
 - And/or, break down systemic barriers to their entrance into the industry
 - Future complementary assessments (ex: separate ports staging and O&M assessment)

Weaknesses from other states' studies:

- Recommendations lack specificity and actionability
 - Example from Virginia: “Enable and grow Virginia’s business opportunity through partnerships and infrastructure...Consider establishing industry specific programs, incentives and resources ”
 - What specific programs, incentives, and resources does the author recommend? What has worked well elsewhere? Why is that program well-suited for implementation? Who is in charge?
- Consulting partners may lack expertise specific to the offshore wind industry and the associated value chain
 - Experience studying solar or other renewable energy supply chains does not necessarily translate into a substantial understanding of the wind energy industry. The components required, opportunities, and infrastructure needed to supply offshore wind differs significantly from that of other renewables.

Elements from [Clemson's 2013 study](#) that do not need to be included:

- Background on clean energy legislation or prior task forces
- Wind energy census section: methodology should not consist of self-selection for companies that are/are not currently in the supply chain, but should be identified by Commerce or other experts in wind who know the entire OSW value chain *and* SC manufacturers

Example assessment: [Maine's Assessment of OSW Supply Chain Opportunity](#)

- Conducted by: [Xodus Group](#) for \$299,500
- Examines:
 - Overview of vessels required for construction, as well as anticipated market demand of those vessels across
 - Opportunities to introduce AI and tech solutions, specifically for O&M
 - Research and development agencies and relative capabilities
 - Educational pipeline opportunities
 - Opportunities to support Minority- and Women-Owned Small Businesses' entrances into the industry
- Strengths:
 - Case studies exemplify existing supply chain constraints
 - Recommendations range in cost, potential funding sources, and agencies capable of carrying out the work