

Building our Potential: Ireland's Offshore Wind Skills and Talent Needs

MIIN Virtual Event

28 March 2024



Aims

- How big is the job opportunity associated with Irish OSW deployment targets?
- Where are key Irish strengths and where in the supply chain do we expect Irish jobs to be?
- What are the skills gaps and challenges to be addressed to maximise local economic benefit and derisk delivery?



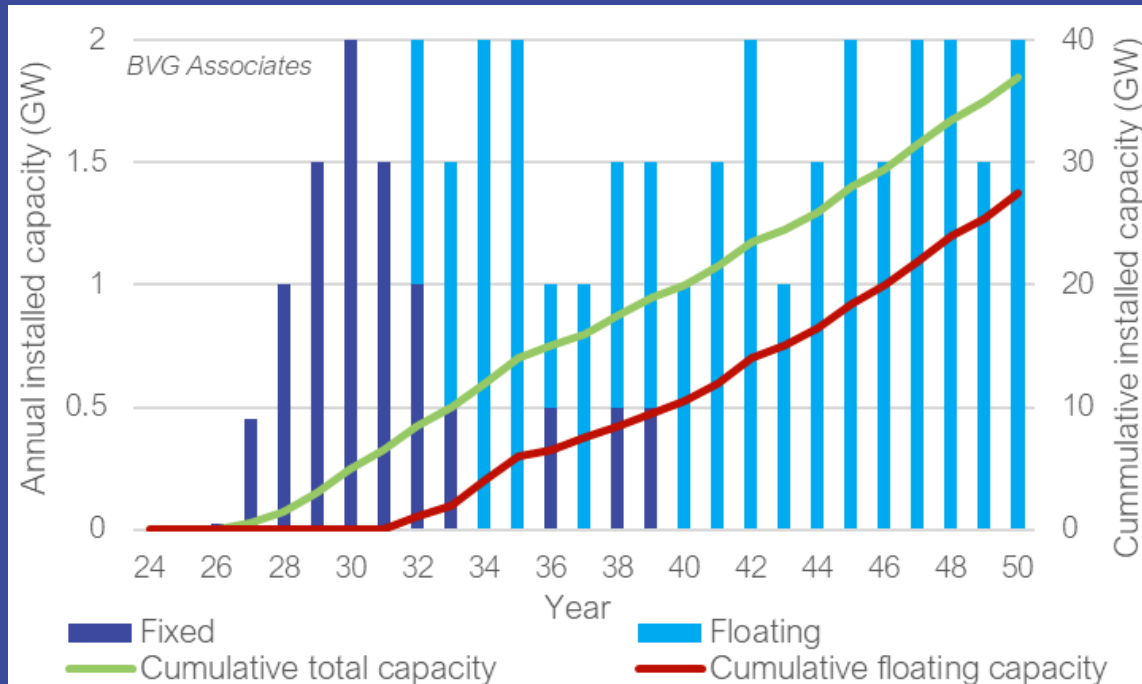
Methodology

1. Establish offshore wind capacity projection
2. Initial supply chain category screening
3. In-depth triage
4. Skills gaps and opportunity analysis for Ireland
5. Recommendations



Market projection

- Ireland installation projection to 2035
- Consistent with Government targets of 5 GW installed by 2030, 20 GW by 2040 and 37 GW by 2050



Current supply chain capability in Ireland

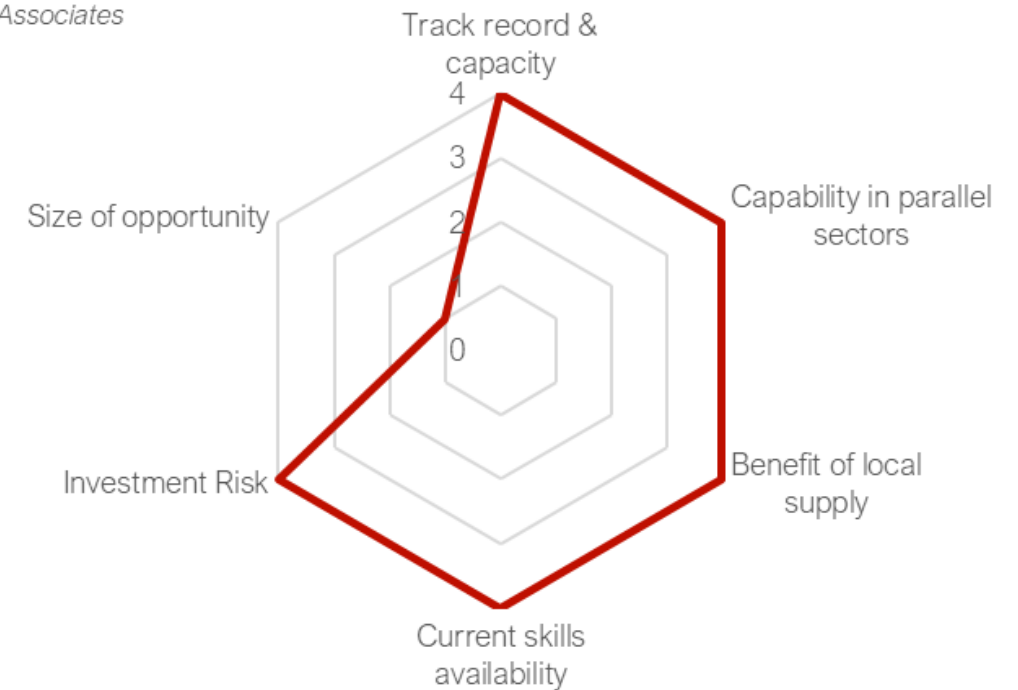
- Initial screening of supply chain categories using RAG ratings
 - Strong Irish opportunities in project development and O&M
 - Manufacturing, installation and decommissioning are not likely, with some notable exceptions, including tower, mooring system and floating substructure manufacture, and the use of construction/assembly ports.
- Assessment of local content in each supply chain category, in a “business as usual” (BAU) scenario and “potential” scenario

Irish opportunities

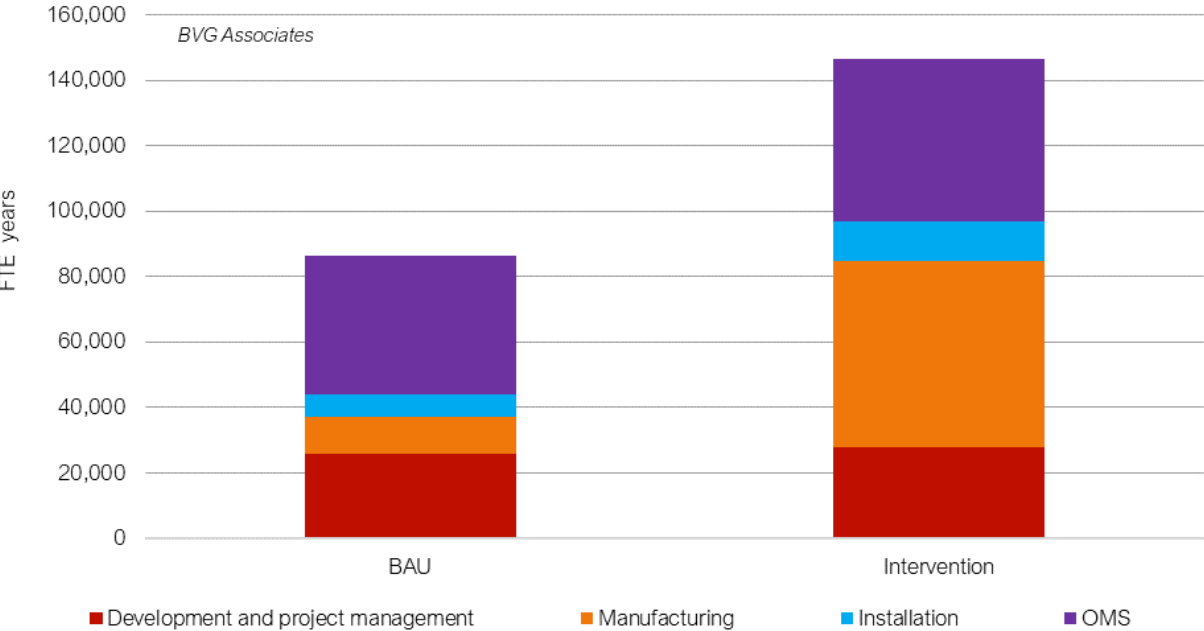
- Development and project management
 - Development and consenting services
 - Environmental surveys
 - Resource and metocean assessment
 - Geological and hydrographical surveys
 - Engineering and consultancy
 - Project management
- Manufacturing
 - Wind turbine
 - Tower
 - Foundation
 - Semi-submersible floating
 - Mooring system
 - Onshore substation
- Installation
 - Onshore export cables
 - Construction port
 - Fixed
 - Floating
 - Offshore logistics
 - Onshore substation
- Operations and maintenance
 - Operations
 - Maintenance
 - Offshore vessels and logistics
 - OMS port

Capability triage: Development and consenting services

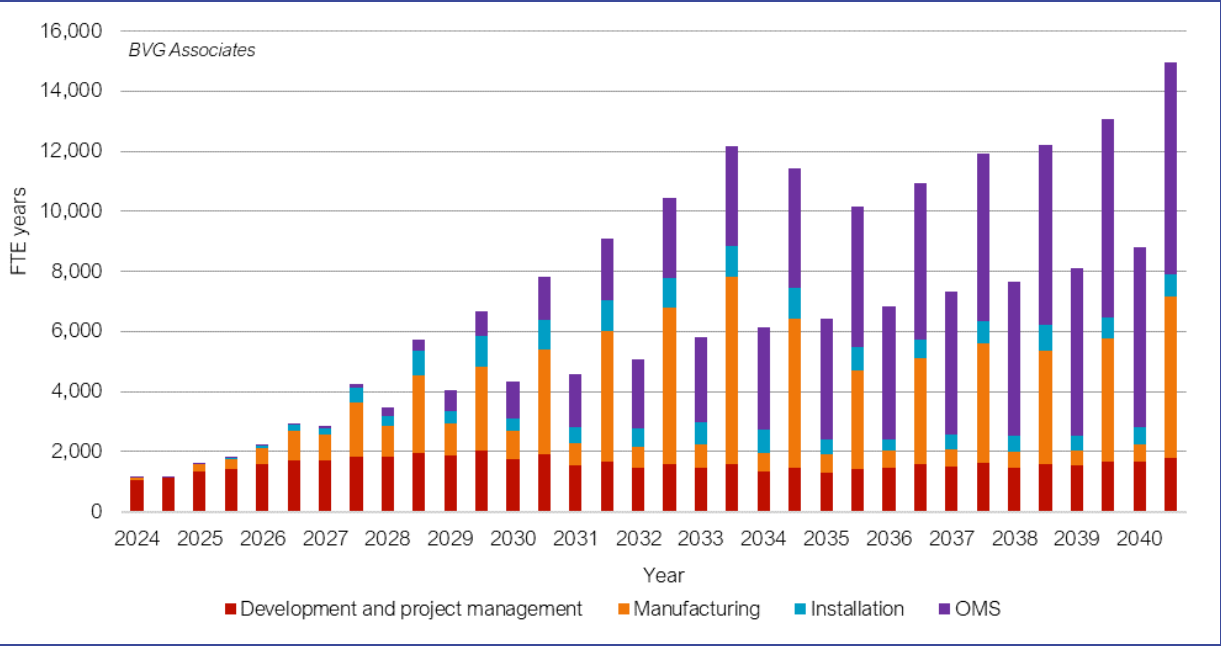
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Overall FTE year demand



Cumulative projected FTE years in Ireland up to 2040, split by lifecycle phase



Comparison of FTE year growth in Ireland in BAU (left) and intervention (right) scenarios from 2024-40, split by lifecycle phase

Key roles in Ireland offshore wind

Offshore consents manager
Grid commercial lead
GIS technician
Bid manager
Community liaison officer
Offshore EIA manager
Marine ecologist
Ornithologist
Resource analyst
Geophysicist
Hydrographer

Electrical engineer
Civil engineer
Mechanical engineer
Geotechnical engineer
Structural engineer
Naval architect
Marine engineer
Project manager
Procurement manager
Commercial analyst

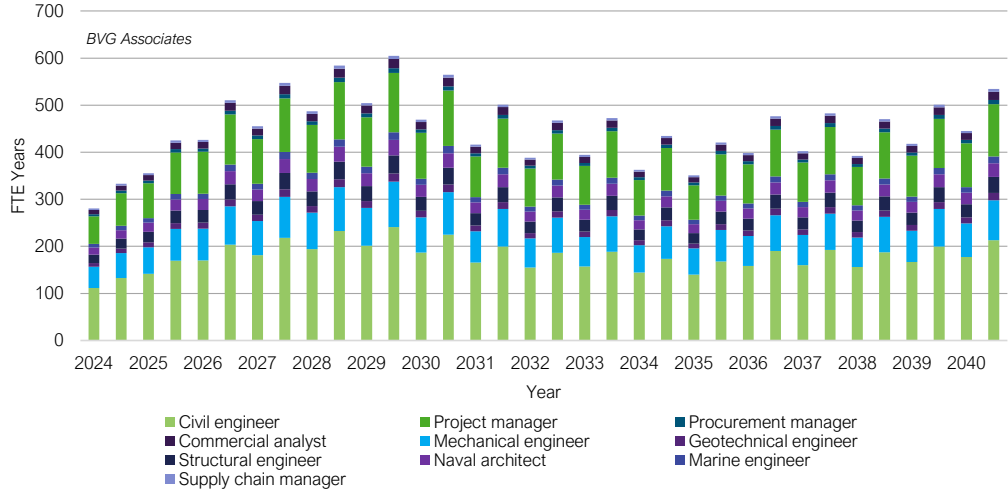
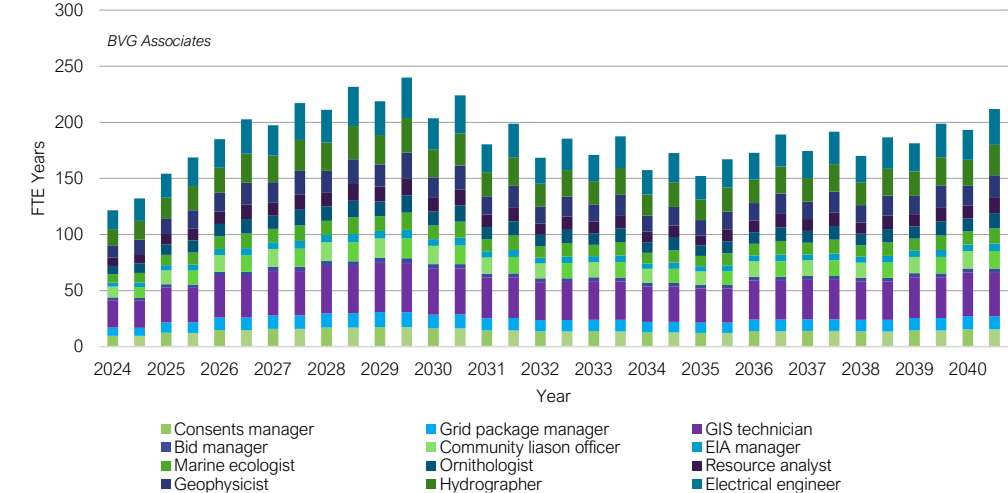
Supply chain manager
Construction project manager
Cable jointer
Electrical technician
Welder
Crane operator
Port operative
Offshore quality manager
Instrument control engineer
Communications network technician
Site manager (onshore and offshore)

Data analyst
SCADA engineer
Health and safety coordinator
Wind turbine technician
Mechanical technician
Boat maintenance technician
Able seafarer
Offshore logistics manager
Master mariner
Harbour pilot

Development and project management job roles

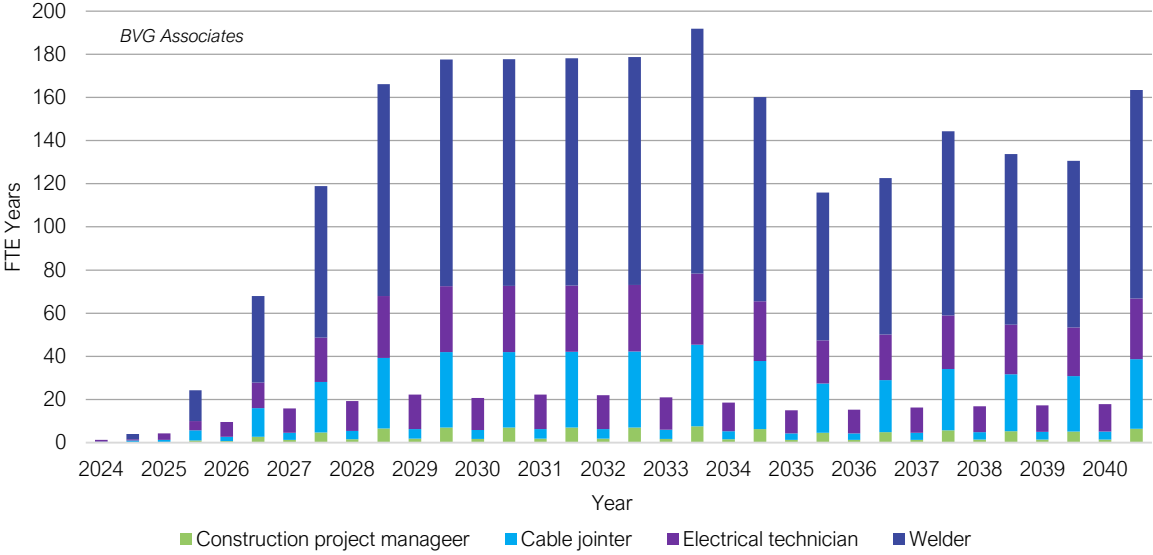
Identified skills shortages

- Management skills and senior roles
- Electrical skills
- Engineering skills
- Surveying and subsequent analysis



Demand for development and project management roles in two scenarios

Manufacturing job roles

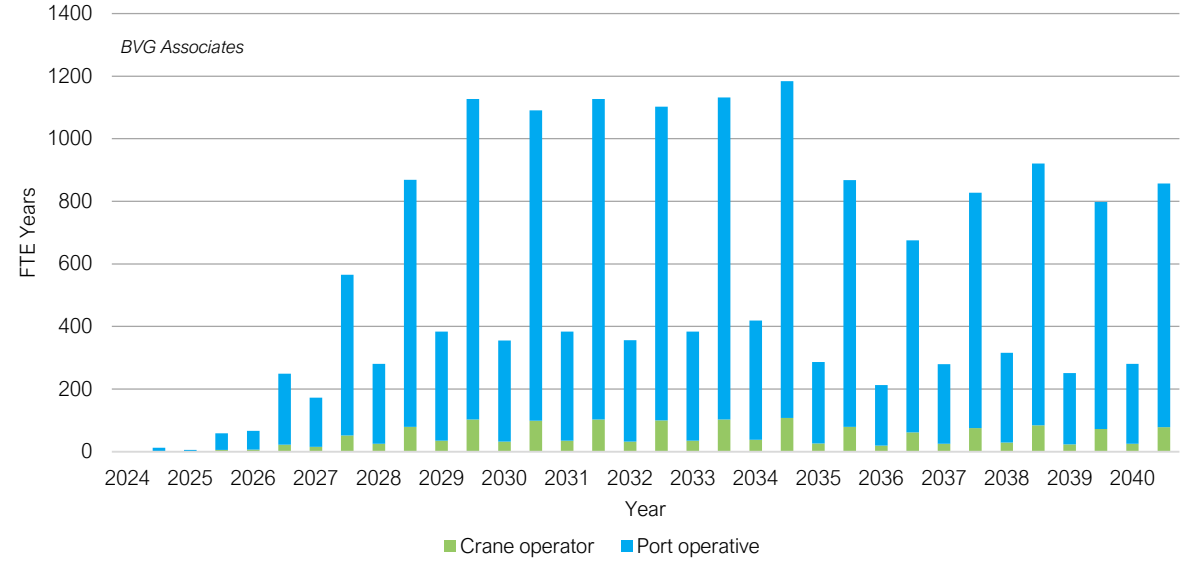


Demand for manufacturing roles in two scenarios

Identified skills shortages

- Skilled trade workers
- Offshore qualifications
- Construction management skills
- Electrical expertise

Installation job roles

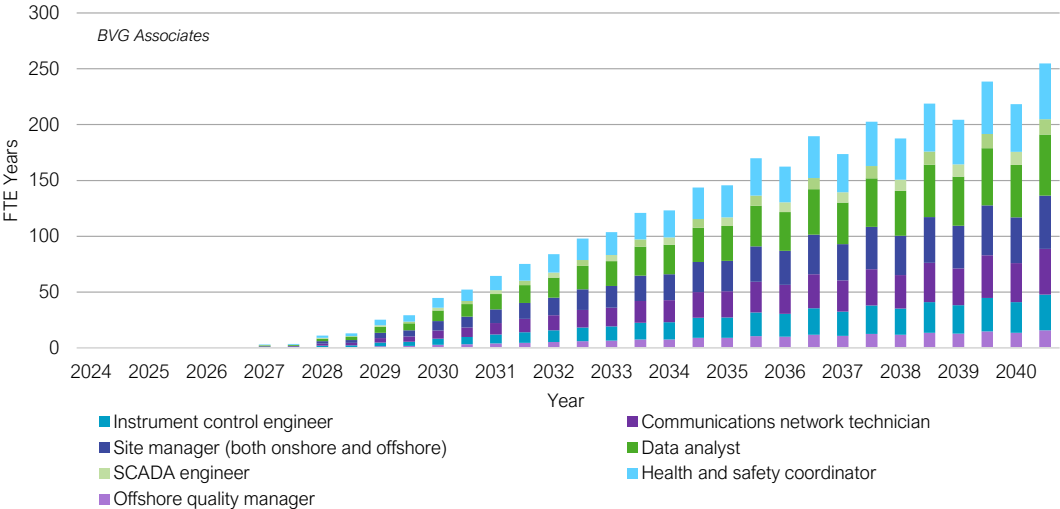
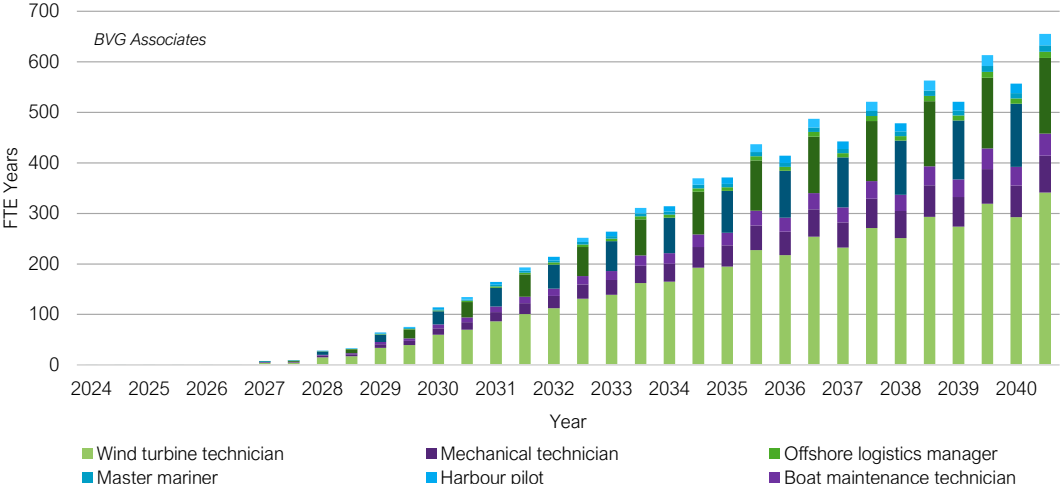


Demand for installation roles in two scenarios

Identified skills shortages

Developers have indicated there is no anticipated shortfall in the key installation related roles we highlight in this report. Nonetheless, bottlenecks may arise as the number of projects simultaneously in the installation phase increases.

OMS job roles



Demand for OMS roles in two scenarios

Identified skills shortages

- Maritime training
- Health and safety expertise
- Skilled trade workers
- Electrical skills

Recommendations

Short term

- Establish a skills fund for match funding for appropriate training initiatives.
- Attract foreign workers to help plug short-term skills shortages (with focus on Irish nationals abroad?)

Medium term

- Demonstrate commitment to offshore wind through strong and clear pipeline, frameworks, supply chain strategy.
- Investment support schemes
- Ensure offshore specialisms are covered in HE and FE (including private training providers)
- Assess training parallels with other expanding industries to avoid duplication of effort

Long term

- Advertise offshore wind as an attractive industry
- Ensure health and safety legislation is relevant to offshore wind
- Build an HV and HVDC knowledge base





info@bvgassociates.com

www.bvgassociates.com

BVG Associates Ltd
The Blackthorn Centre
Purton Road
Cricklade, Swindon
SN6 6HY UK
tel +44 (0) 1793 752 308

BVG Associates Ltd
Inovo
121 George Street
Glasgow
G1 1 RD UK
tel +44 (0) 44 212 0800

BVG Associates LLC
7400 Beaufont Springs
Drive
Suite 300
Richmond
Virginia
23225 USA
tel 1 (804) 591 1602

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