

Case Study

Profiling Offshore Wind Capability

Client: Tees Valley Unlimited



Project summary and outcomes



TBR delivered a detailed review of the size and scale of the existing and potential Offshore Wind supply chain within the Tees Valley. The assessment was comparative, assessing Tees Valley against two other prominent regions for this sector and identified over 250 local firms already engaged in the sector and a further 2,500 with transferable skills and capabilities.

The disaggregation of the sector covered 8 sub-sectors and 32 different segments, providing unrivalled detail on the profile of this increasingly important industry. Our report identified local competitive advantage in large structure fabrication, port services, advanced engineering and a host of other skills and capabilities across the Tees Valley supply chain.

The report will enable TVU to:

1. Develop compelling propositions to key investors in the Offshore Wind sector, particularly large developers and turbine manufacturers, to encourage them to consider Tees Valley as a location for their operations.
2. Include detailed evidence of the economic scale and value of this sector in funding bids.
3. Target local businesses for supply-chain development initiatives.
4. Plan for and support skills development in order to facilitate the transition to supplying the Offshore Wind sector.
5. Engage with local Offshore Wind suppliers to identify and address business development challenges.
6. Position the Tees Valley to take advantage of the Crown Estate's Round 3 development programme, specifically the 1,700 turbine, 6000 MW development on Dogger Bank.
7. Continue to facilitate the transition to new markets and sectors.

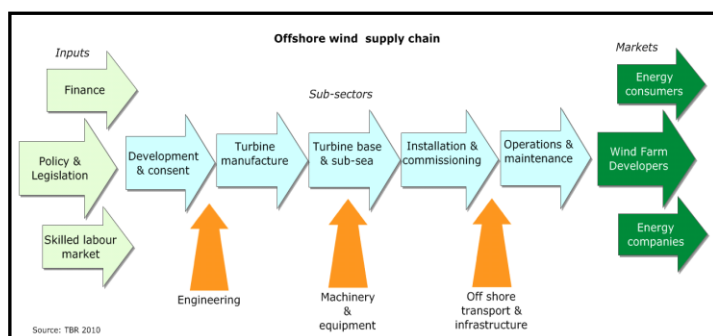
Neil Kenley, Director of Business Investment at TVU;

"This piece of work was a crucial building block in a process allowing us to examine Tees Valley's capability to tap into the huge opportunities presented by Offshore Wind. By obtaining accurate baseline data, we are now able to work with partner organisations to position the area as a leading location for offshore wind supply chain activity. TBR's work has assisted the development of a regional partnership approach with NOF Energy, the Tees Valley local authorities and private sector partners."

TBR's solution

The challenging carbon reduction targets for the UK mean that renewable energy sources will grow rapidly in significance over the coming decades. Ensuring that market opportunities within this sector are maximised requires a deep understanding of the capabilities of local and regional economies to develop and supply the new technologies, goods and services that will be required to build sustainable supply chains and sectors.

TVU, on behalf of local private and public partners, is taking a leading role in positioning the Tees Valley to take advantage of its geographic location and topological features with respect to the Offshore Wind market. TVU commissioned TBR to deliver an insightful and concise assessment of the local Offshore Wind sector and its supply chain. TBR's report answered key questions regarding the current supply chain and the potential further support for Offshore Wind that could be developed across the wider economy.



To meet this challenging brief, TBR's specialist business research team - the TBR Observatory - applied its extensive business data knowledge to develop a sophisticated, segmented definition for the Offshore Wind sector. We also undertook desk research and consultation with regional stakeholders to map the sector and its supply chain. This, combined with business information gained from sector specific directories, was used to identify businesses within the existing and potential Offshore Wind supply chain in three locations - the North East, North Wales & the North West and the Humber Estuary.

The TBR Observatory team matched the company and sector information into its unique business database (TCR) to produce a segmented dataset of existing suppliers. The team then used the results of this analysis to identify businesses with the potential to work in the sector, based on their core business activities, skills and competencies. In addition, TBR undertook a review of occupational data in conjunction with the relevant Sector Skills Council strategies to add insight to the business analysis about how the labour market helps or hinders growth of the sector locally.

tbr knows... **economics, creative, skills, environment**

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