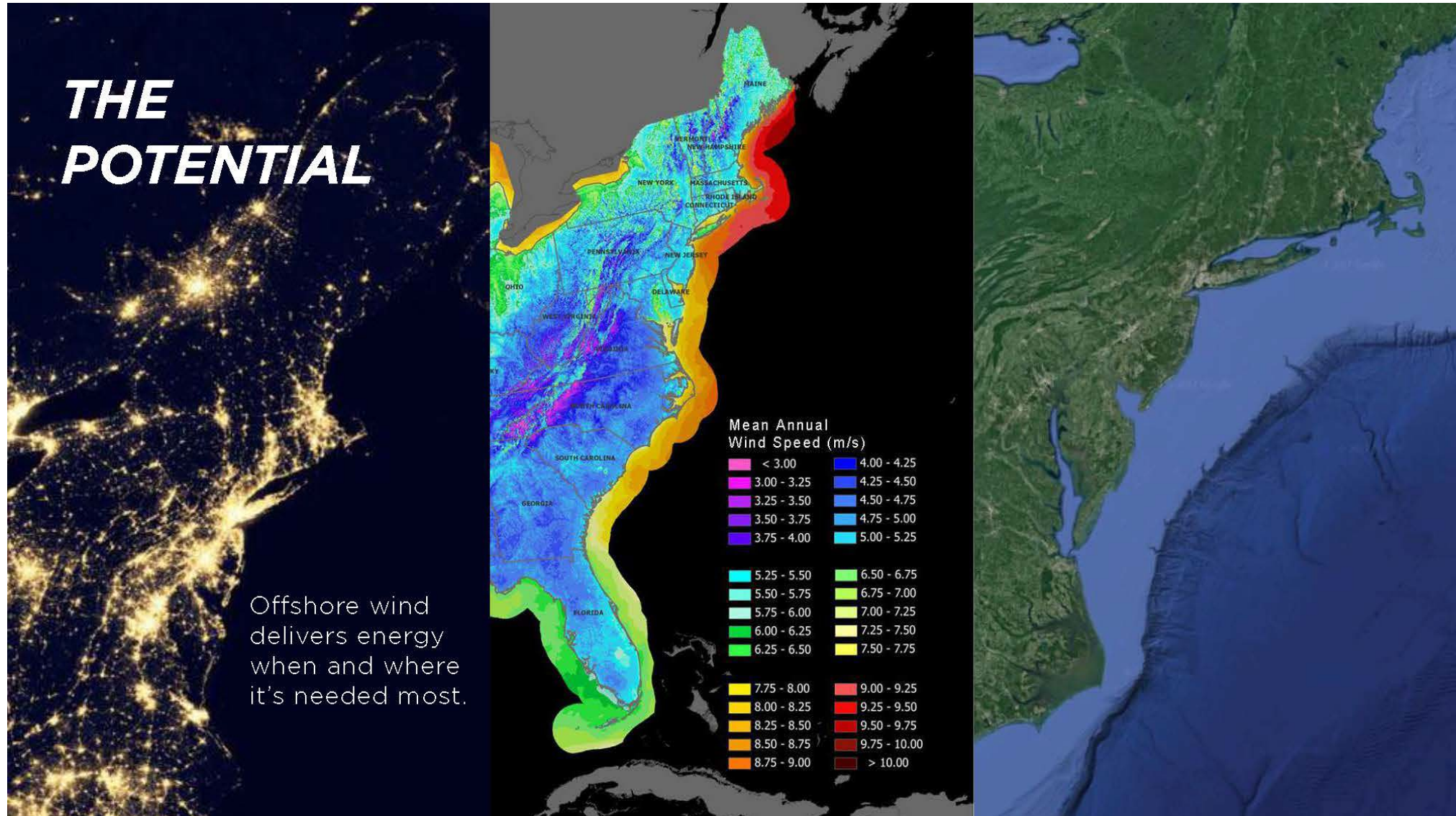


Offshore Wind Update



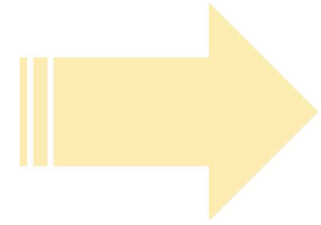
- **Offshore wind opportunity**
- **Market drivers**
- **East Coast project pipeline**
- **"Virginia's Projects"**
- **Virginia's offshore wind advantages**
- **Supply chain competition**
- **Alliance offshore wind activities**

Offshore Wind Opportunity



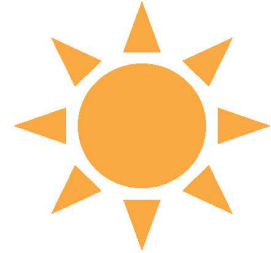


Virginia Clean Economy Act



40% by 2030

Produce 40 percent of Virginia's electricity from renewable energy sources by 2030



100% by 2050

Produce 100 percent of Virginia's electricity from carbon-free sources by 2050



Energy Equity

Achieve energy goals in a just manner that advance social, energy, and environmental equity

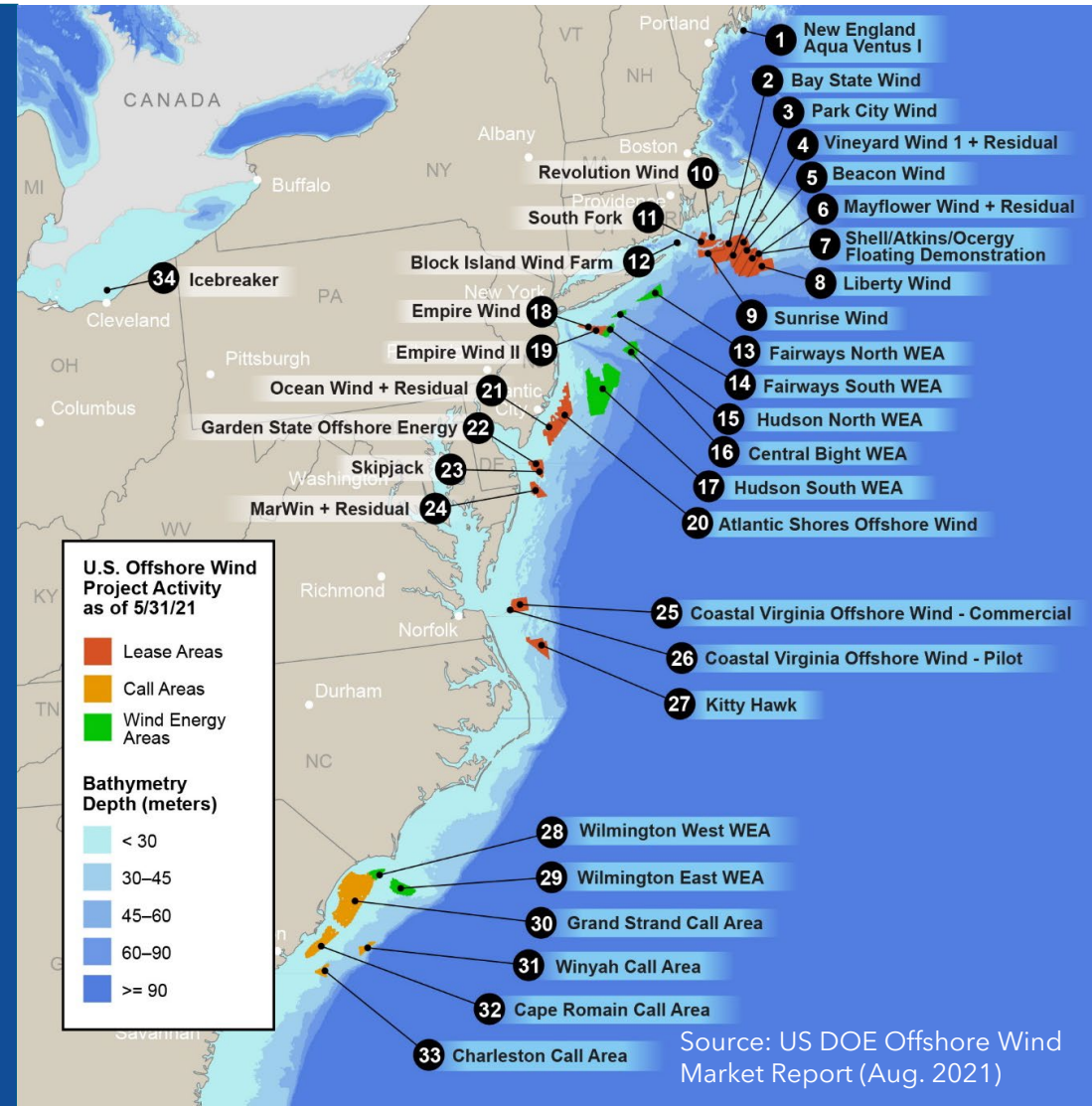


Offshore Wind Lease and Call Areas



OSW Project Pipeline

- Projects in 11 states
- 35,234MW US project pipeline
- 42MW operating in RI and VA
- 10,779MW in permitting phase
- Coastal Virginia Offshore Wind (2,640MW) and Kitty Hawk Offshore Wind (800MW) moved to permitting phase in Dec. 2020



Source: US DOE Offshore Wind Market Report (Aug. 2021)

What Has Changed?

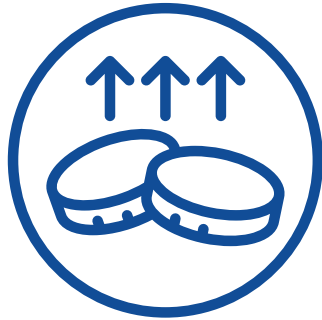


- **The industry is finally “real”**
- Vineyard Wind 1 is first project to achieve financial close
- BOEM announced Notice of Intent to prepare EIS for multiple projects
- More certain and timely federal regulatory process
- Federal target to deploy 30GW by 2030
- 11 projects with power purchase agreements or equivalent

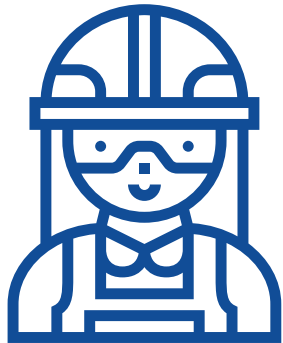


- Confidence in the market and a willingness by the industry to make investment in the U.S.

Scale of Opportunity



\$80B in Capital Investment



83,000 Workers

"Virginia's Projects"

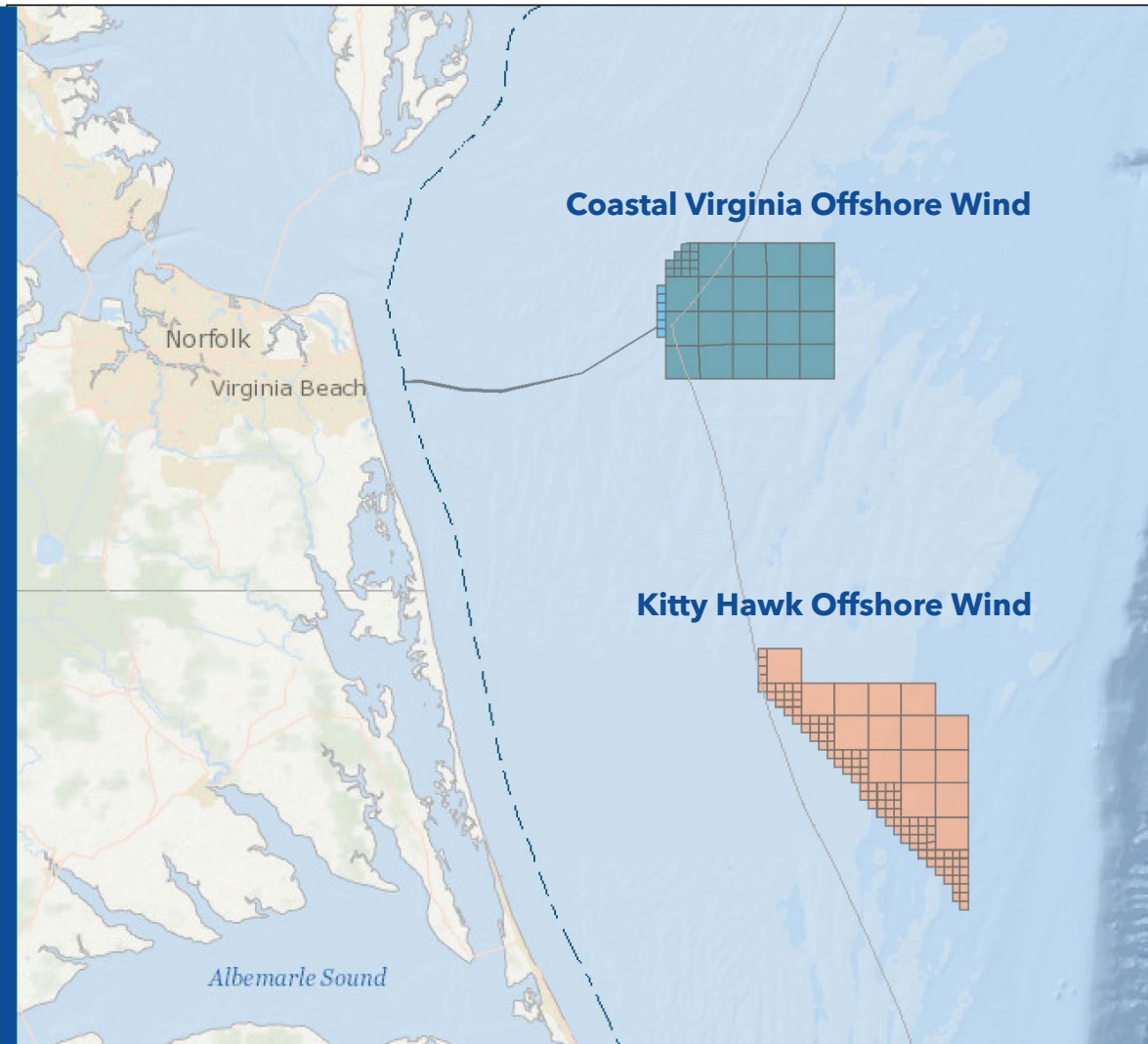


Coastal Virginia Offshore Wind

- Dominion Energy
- 2,640 MW
- 27 miles off the coast of Virginia Beach

Kitty Hawk Offshore Wind

- Avangrid Renewables
- 2,500 MW
- 36 miles off the coast of Virginia Beach



Dominion Energy CVOW Suppliers



Wind Turbine Generators

Monopiles

Transition Pieces

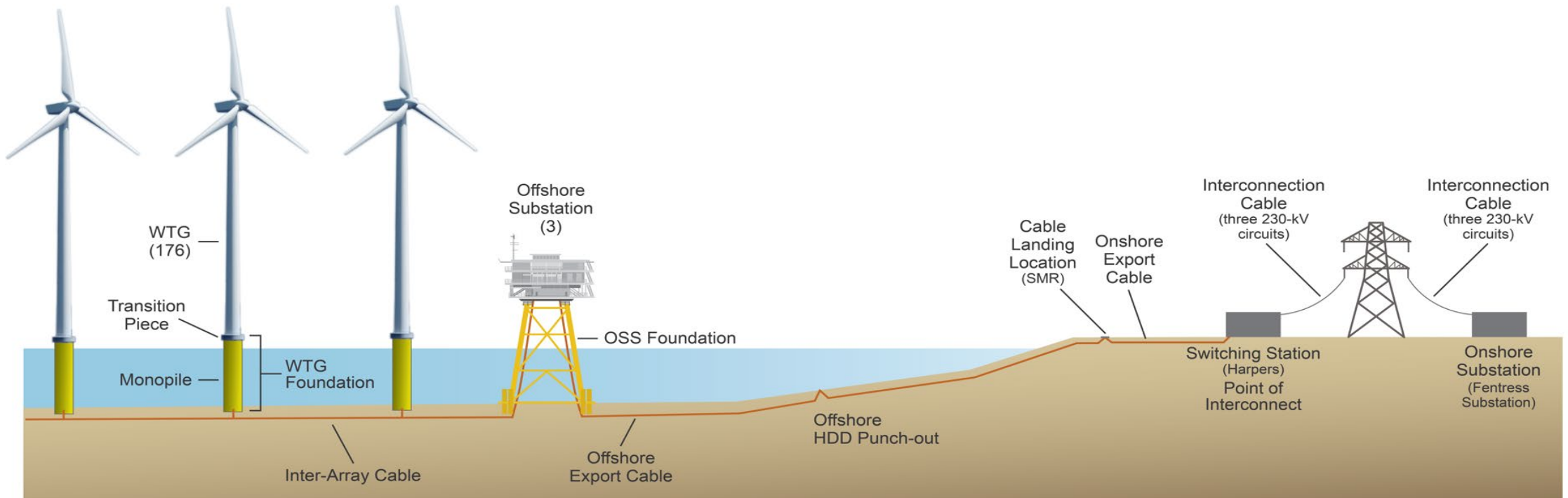
Offshore Substations

Transport & Install

SIEMENS Gamesa
RENEWABLE ENERGY



Prysmian
Group



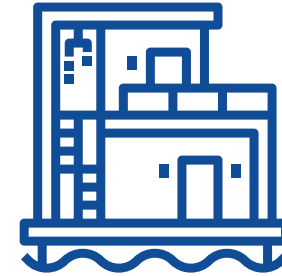
Virginia's Advantages



**Unmatched Port
Infrastructure**



**Large & Skilled
Maritime Workforce**



**Terminal Facilities &
Waterfront Sites**



**America's Largest
Shipbuilding Industry**



Pro-Business Climate



Strategic Location

Port of Virginia Terminals



Portsmouth Marine Terminal

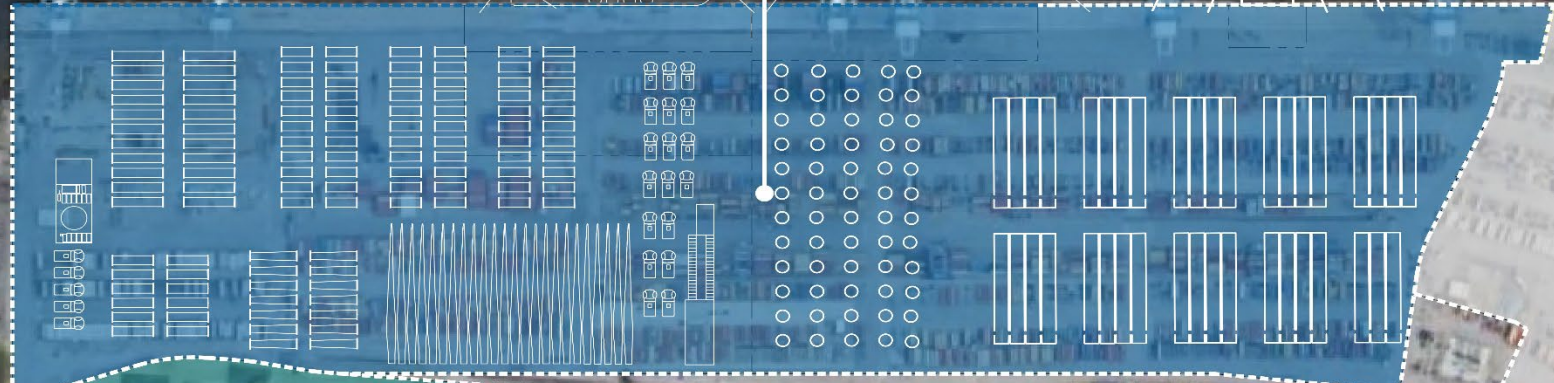
- 270 acres
- Mostly ready site
- Fast access to open ocean
- No overhead obstructions
- Deep water
- Dedicated offshore wind port



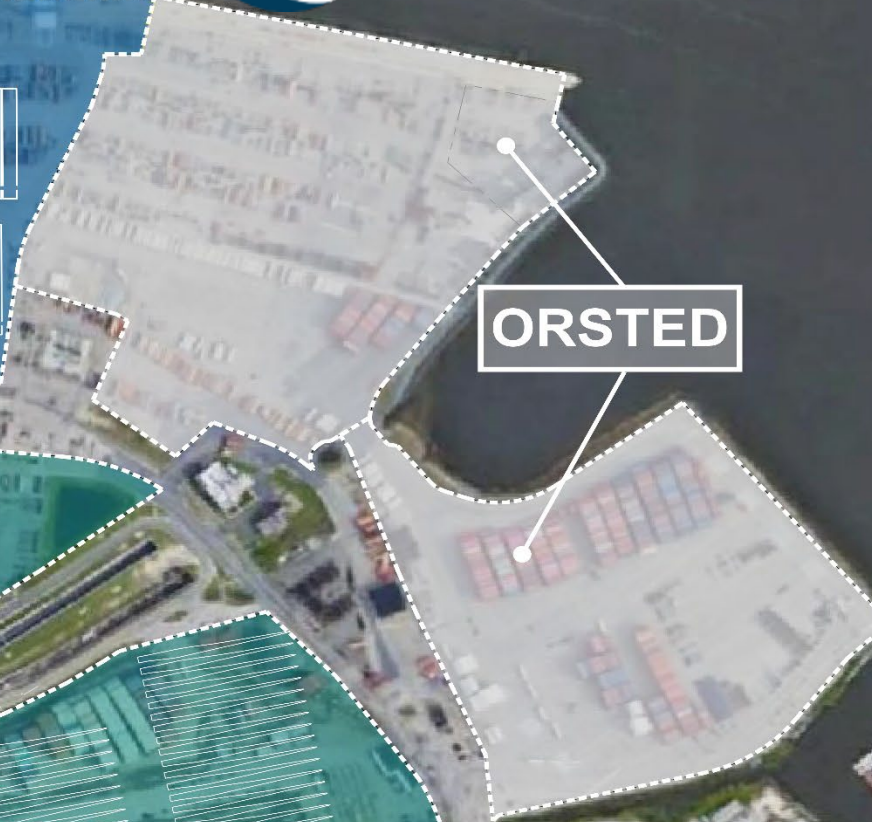
DOMINION ENERGY



THE PORT OF VIRGINIA



SGRE

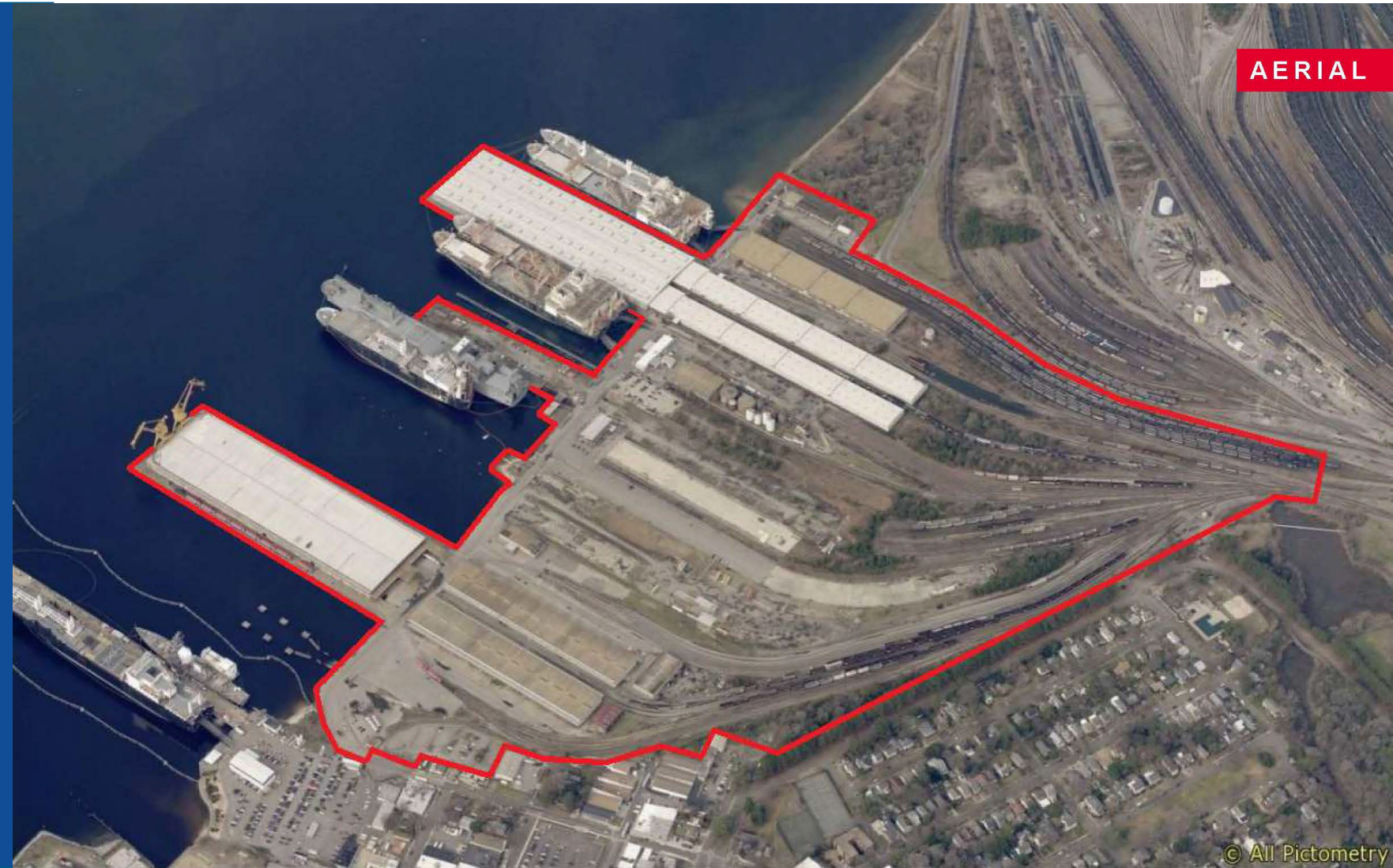


ORSTED

Marine Terminals and Real Estate



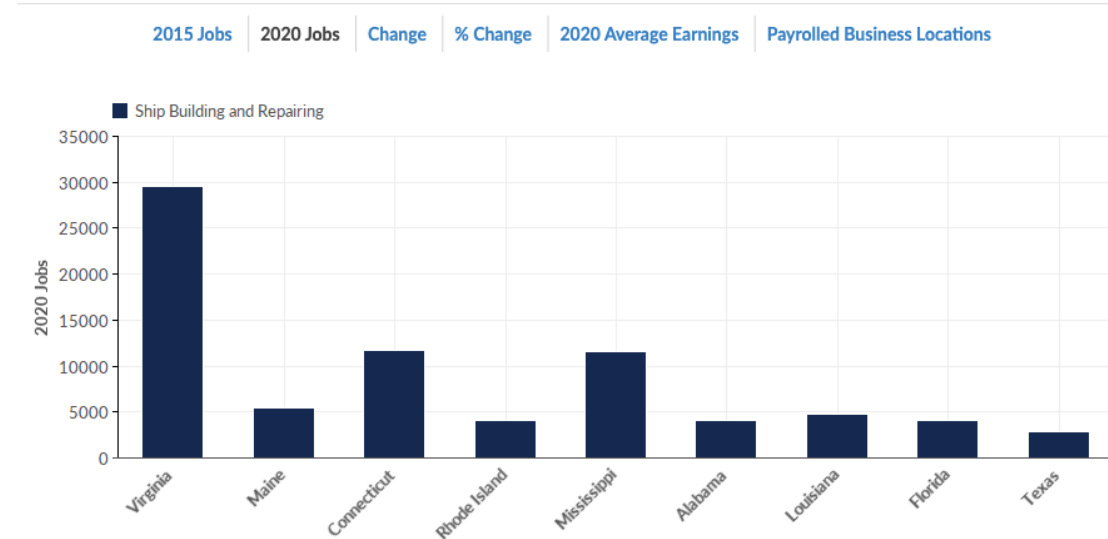
- Over 50 private terminals
- Variety of sites for development or redevelopment
- Ability to support multiple tiers of the supply chain



Building on a Strength of Virginia's Economy



Industry Breakdown



Industry	Description	Virginia	Maine	Connecticut	Rhode Island	Mississippi	Alabama	Louisiana	Florida	Texas
336611	Ship Building and Repairing	29,602	5,381	11,746	4,040	11,539	4,096	4,746	4,063	2,920
	Total	29,602	5,381	11,746	4,040	11,539	4,096	4,746	4,063	2,920

- Virginia accounts for **over a quarter of all employment** in the U.S. shipbuilding and repair industry, more than all East Coast competitors combined.
- Additionally, over 4,500 workers are employed in non-shipbuilding maritime industries.
- 15,000 transitioning service members

Selection of major regional employers:



Newport News Shipbuilding



COLONNA'S SHIPYARD, INC.

GENERAL DYNAMICS
NASSCO

BAE SYSTEMS

Source: EMSI; Q2 2021

Private employment of workers directly involved in ship building and ship repair activities

A New Pillar of Virginia's Maritime Industrial Base



Maritime Industrial Base



Supply Chain Competition



Rendering of Paulsboro, NJ monopile foundation facility

Alliance Supply Chain Development Initiative



*Supported by a \$529,788
GO Virginia grant*

- Build a regional offshore wind hub
- Attract new investment to the Commonwealth
- Grow Virginia businesses
- Create long-term, high-wage jobs



Virginia Partners



Economic Development

Awareness and Readiness Activities



**Supplier Readiness Event -
Coastal Virginia Offshore
Wind Project**

HAMPTON ROADS ALLIANCE
OFFSHORE WIND
Growing the Virginia Supply Chain.

Dominion Energy

December 2020 B2B Events

- 5 events across the Commonwealth
- 300+ participants

CVOW Friday Forums

- Series of monthly events
- Focused on supply chain education and opportunities

**CVOW
Friday
Forums**

The workforce information you've been waiting for.

Register at:
<https://bit.ly/200f1Gj>

May 21st, 2021
9:00 - 10:30am

Join us for a special edition of the Forum to learn about workforce training and job opportunities in offshore wind.

- Jeff Tingley, Senior Consultant with Xodus Group, and Shawn Avery, President & CEO of the Hampton Roads Workforce Council, will discuss job roles in offshore wind and the HRWC's plans to develop industry-specific resources.
- Our panel of experts will then discuss Virginia's initiatives to equip workers with the skills necessary for success in this new industry, and take your questions.

Moderator	Panelists		
 Jennifer Palostrant Chief Deputy Department of Mines, Minerals, and Energy	 Whitney Lester Senior Director of Talent Development Hampton Roads Workforce Council	 Todd Estes Executive Director Community College Workforce Cooperative	 Karen Jackson Int. Executive Director New College Institute

Dominion Energy

HAMPTON ROADS ALLIANCE
OFFSHORE WIND
Growing the Virginia Supply Chain.

HAMPTON ROADS
WORKFORCE COUNCIL

Virginia Offshore Wind Landing



Matchmaking Events



May

seaway⁷

Nexans

August



METAL SHARK
METALSHARKBOATS.COM



Offshore Wind Supply Chain Study



- Supply chain assessment and gap analysis
- Survey of businesses to determine regional capabilities
- Identification of job roles and training needs
- Enable connections between major suppliers and local businesses
- Recommendations to establish Hampton Roads as supply chain hub



IPF VIP Welcome Weekend



VIP Weekend by the Numbers

- 12 different events and activities
- Over 115 people attended the in-person First Friday Forum
- More than 100 people attended the welcome reception
 - Governor and First Lady
 - Congresswoman Elaine Luria and Congressman Bobby Scott
 - Mayor Bobby Dyer and Mayor Rick West
- More than 40 people joined the harbor tour
- 29 Virginia businesses each met with 4 of the 11 participating VIP companies during the matchmaking event
- 21 organizations contributed sponsorships to the weekend



Conferences and Trade Shows



- Business Network for Offshore Wind IPF trade show in Richmond August 24 - 26
- Offshore Wind Transmission US 2021 in New York City Sept. 21 - 22
- ACP Offshore WINDPOWER Conference and Exhibition in Boston October 13 - 15
- Offshore Energy Exhibition and Conference in Amsterdam Oct. 26 - 27
- International Workboat Show in New Orleans Dec. 1 - 3

Business Attraction Activity



- Approximately 200 engagements with offshore wind companies from Q3 2020 through Q4 2021
- Hosted 23 regional visits with 18 companies
- Ongoing outreach campaigns
- 57 projects generated in 2021

2021 Major Announcements



- Dominion Energy will use PMT as construction terminal
- Siemens Gamesa Renewable Energy will locate first U.S. turbine blade facility in Hampton Roads
- Dominion Energy selected of major suppliers for Coastal Virginia Offshore Wind

January CVOW Friday Forum



CVOW FRIDAY FORUM

2022

HAMPTON ROADS
ALLIANCE

**Dominion
Energy**

Dominion Energy and the Hampton Roads Alliance want to help your business become part of the Coastal Virginia Offshore Wind project. Don't wait for an RFP and be left scrambling! Join us for a Readiness Refresher straight from Dominion Energy's major CVOW suppliers. The suppliers will discuss their contracting requirements so you know exactly how to prepare.



Moderated by:
Will Keenan
Manager - Construction Projects
Dominion Energy

Featuring a panel of representatives from the companies that will be building and installing the CVOW project

Jan. 28
9-10am

click to
Sign up

Contact Information



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Growing the Virginia Supply Chain.

Follow us on LinkedIn, Facebook, and Twitter

www.HamptonRoadsAlliance.com/offshorewind