

Case Study – Floating Offshore Wind (FLOW)

Better Decisions Start with Better Intelligence

Supporting the Welsh Government Floating Offshore Wind Task Force through Evidence-Based Industrial Intelligence

The Challenge

Floating Offshore Wind (FLOW) represents one of the most significant industrial opportunities Wales has seen for decades. Success, however, will depend on far more than offshore wind technology. It will depend on whether Wales can mobilise the engineering, manufacturing and supply chain capability required to support an entirely new industry. Recognising the scale of the opportunity, Welsh Government established the Floating Offshore Wind Task and Finish Group to develop an Action Plan that would maximise Welsh participation and prepare the nation long before commercial deployment began. The Task Force brought together representatives from Welsh Government, The Crown Estate, ports, local authorities, industry organisations and trade bodies. Industry Wales was invited to participate as an independent adviser. Representing Industry Wales, Mike Gillard contributed throughout the six-month programme, providing manufacturing expertise, supply chain knowledge and evidence-based industrial analysis.

The Missing Intelligence

Throughout the programme one message surfaced repeatedly.

"Wales is a nation of SMEs."

Whilst factually correct, Mike believed this was the wrong starting point.

Every nation and region across the United Kingdom is dominated by small and medium-sized businesses. Simply recognising that fact does little to help governments make better strategic decisions.

Instead, he challenged the discussion with a different question.

What manufacturing capability already exists in Wales?

It was a subtle change.

But it completely changed the direction of the conversation.

The objective was no longer to identify companies already working in offshore wind.

The objective became identifying companies with the engineering capability to become part of the future supply chain.

That distinction transformed the challenge from one of **existing markets** to one of **existing capability**.

Turning Data into Industrial Intelligence

Answering that question required considerably more than a simple search of Companies House.

Mike began with the complete Companies House register—approximately **seven million company records** distributed across seven datasets, each containing around one million rows.

Most of these companies were immediately irrelevant. Many were dissolved, dormant or operated outside manufacturing.

The remaining data was progressively refined using a structured methodology designed specifically for industrial capability analysis.

Unlike many approaches that rely solely on a company's primary Standard Industrial Classification (SIC) code, the methodology examined **all four registered SIC codes** for every active Welsh manufacturing business.

This was an important distinction.

Many manufacturers operate across several industrial activities. Restricting analysis to the primary SIC code risks overlooking valuable engineering capability that may be directly transferable into emerging industries.

Each manufacturing sector was then assessed for its potential relevance to Floating Offshore Wind.

The result was an evidence-based assessment identifying **1,830 Welsh manufacturing companies** with potential capability to support the future FLOW supply chain. These findings were presented to the Task Force and later referenced within the published Welsh Government Action Plan.

The database was never the objective.

The objective was to convert data into intelligence that could support better strategic decisions.

Challenging Assumptions with Evidence

The analysis quickly became more than a technical exercise.

It became a catalyst for better discussion.

Throughout the programme Mike consistently encouraged the Task Force to look beyond traditional perceptions of Welsh industry.

Rather than focusing on what Wales lacked, he demonstrated what Wales already possessed.

Decades of investment have created internationally competitive manufacturing capability across sectors including automotive, aerospace, rail, defence, steel, nuclear and advanced engineering.

Those capabilities are highly transferable.

Companies do not need previous offshore wind experience to manufacture offshore wind components.

They need engineering capability, robust quality systems, skilled people and the capacity to adapt.

This evidence fundamentally broadened the potential Welsh supply chain and encouraged a more capability-led approach to industrial strategy.

Better Intelligence. Better Decisions.

Industrial strategy succeeds when investment decisions are based on evidence rather than assumptions.

By combining manufacturing knowledge with large-scale industrial data analysis, Mike helped provide the Task Force with a clearer understanding of the capability already available across Wales.

His contribution extended well beyond technical analysis.

He participated in discussions throughout the programme, challenged accepted assumptions where evidence suggested otherwise, contributed to the development of the supply chain sections of the final Action Plan and consistently encouraged evidence-led decision-making.

The methodology developed during the programme is repeatable.

The same principles can be applied across advanced manufacturing, aerospace, defence, rail, nuclear, energy, inward investment and supply chain resilience.

This is the philosophy that underpins GSCI.

Better Decisions Start with Better Intelligence.

The Outcome

The FLOW programme demonstrated that the most valuable industrial opportunities are not created simply by investment.

They are created by understanding capability.

By replacing assumptions with evidence, the project provided Welsh Government with a more informed understanding of Wales' manufacturing base and a stronger foundation for future industrial planning.

More importantly, it demonstrated a practical methodology for transforming large volumes of industrial data into strategic intelligence that supports better decision-making.

That methodology now forms part of the analytical approach developed by GSCI.

Because every strategic decision begins with the same question:

Do we have the intelligence to make the right decision?

At GSCI, we believe:

Better Decisions Start with Better Intelligence.

Evidence at a Glance

Client	Welsh Government
Programme	Floating Offshore Wind (FLOW) Task and Finish Group
Role	Independent Manufacturing & Supply Chain Adviser (Industry Wales)
Duration	Six months
Starting Dataset	Approximately 7 million Companies House records across seven datasets
Methodology	Evidence-based manufacturing capability assessment using all four registered SIC codes
Manufacturing Capability Identified	1,830 Welsh manufacturing companies with potential FLOW relevance
Strategic Contribution	Evidence-based industrial intelligence supporting the Welsh Government Action Plan