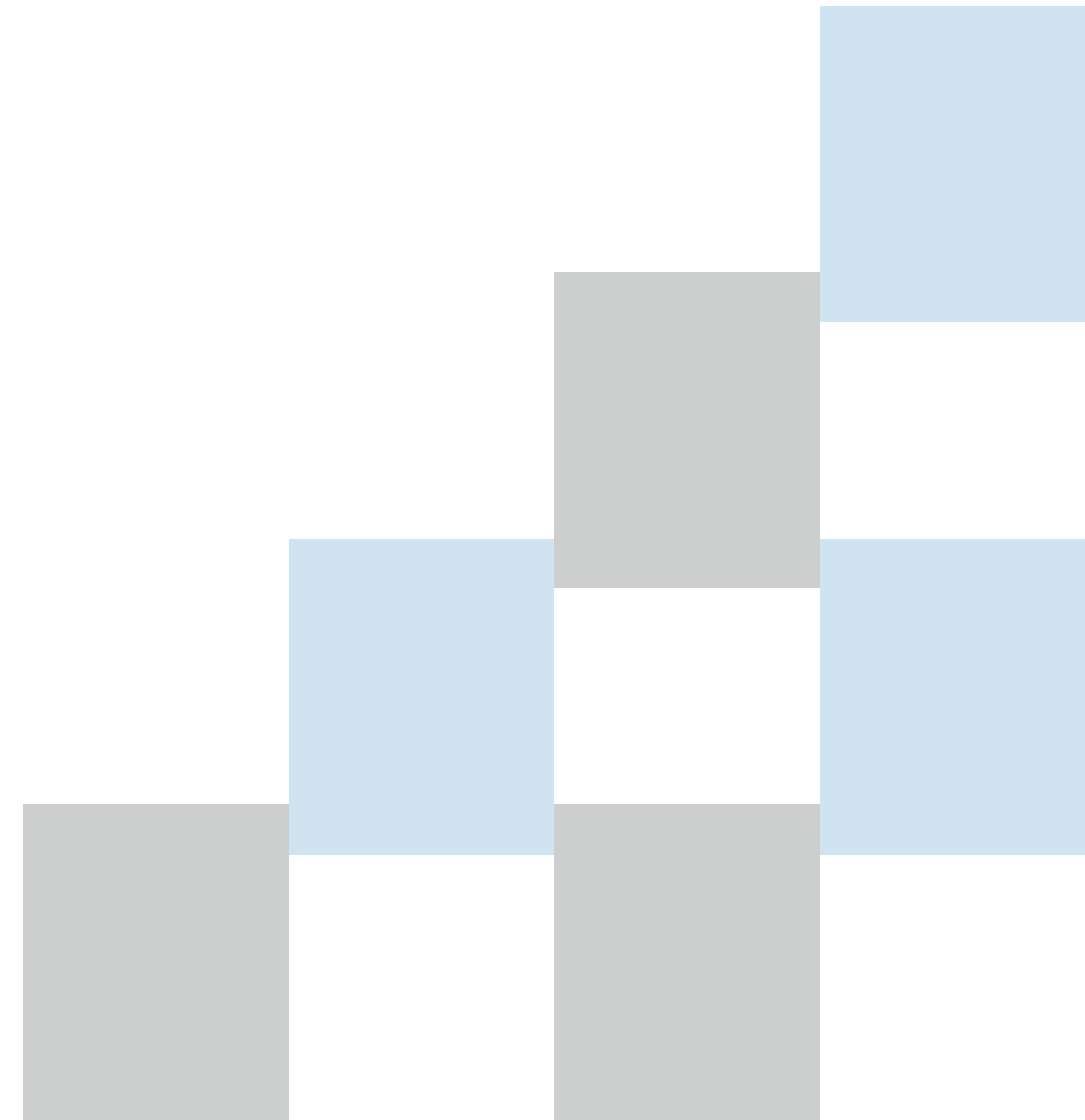




# Industry Update: Advancements, Regulations, and Progress

The Bergen International Diving Seminar  
07 November 2023

Scandic Flesland Airport Hotel  
Bergen, Norway





# Presentation Areas of Focus

- Offshore Sector Outlook (Wind / Oil and Gas)
- ANSI/ADCI-01-202X
- ADCI International Consensus Standards for Commercial Diving and Underwater Operations – Revisions for edition 6.5
- ADCI audit requirement for contractors and schools
- Underwater Intervention / International Workboat Show 2023



Phil Newsum,  
Executive Director, ADCI

OFFSHORE SECTOR OUTLOOK

# Wind Market Outlook in the U.S.



OFFSHORE SECTOR OUTLOOK

# Wind Market Outlook in the U.S.

Remains largely undeveloped and the pace of development remains slow

- 7 installed and operating offshore turbines with a combined generating capacity of 42 megawatts
- The 30,000-megawatt (2,100 turbines) goal in 7 years (2030) is not attainable at the current pace and is probably far too aggressive of a timeline

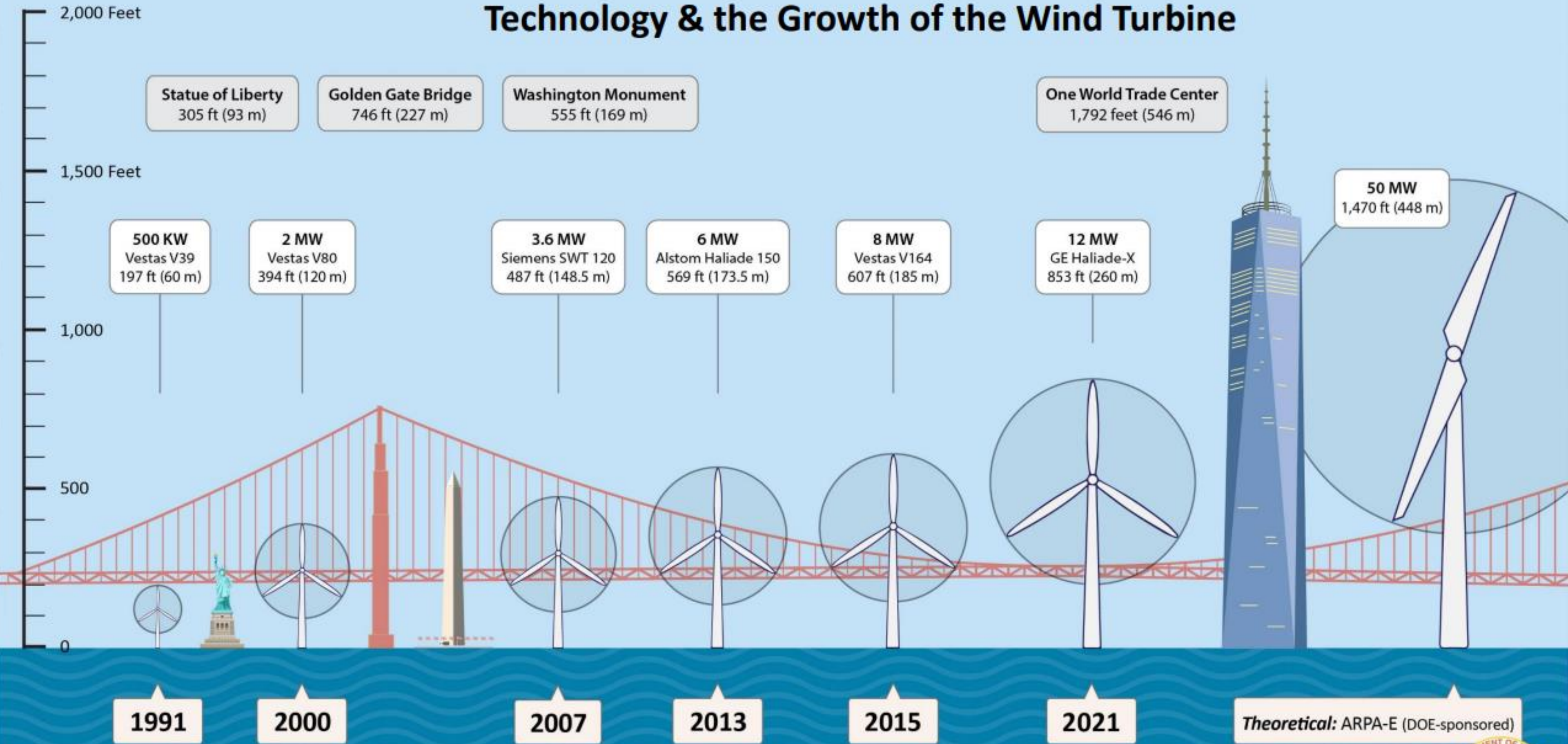
Currently, only 2 projects are under construction:

- 800 MW Vineyard Wind 1 (2024) and
- 132 MW South Fork Wind Farm (2023)

State	Offshore Wind Targets	Key Projects
Massachusetts	<a href="#">5,600</a> MW by 2027	Vineyard Wind (2024), Park City Wind (2025), Mayflower Wind (2025)
Connecticut	<a href="#">2,000</a> MW by 2030	Revolution Wind (2024), Park City Wind (2025)
Rhode Island	No set target but request for proposals for up to <a href="#">1,000</a> MW of new capacity	South Fork Wind (2023), Revolution Wind (2024), Sunrise Wind (2025)
New York	<a href="#">9,000</a> MW by 2035	Empire Wind (2026), Ocean Winds East (TBD), Atlantic Offshores (TBD)
New Jersey	<a href="#">7,500</a> MW by 2034	Atlantic Shores Offshore Wind 1 (2027), Ocean Wind 1 (2025), Shared projects with New York
Virginia	<a href="#">5,200</a> MW by 2034	Coastal Virginia Offshore Wind (2026)
North Carolina	<a href="#">2,800</a> MW by 2030 and <a href="#">8,000</a> MW by 2040	Kitty Hawk (2027)
Louisiana	<a href="#">5,000</a> MW by 2035	N/A
California	<a href="#">2,000-5,000</a> MW by 2030	Morro Bay and Humboldt lease areas
Oregon	<a href="#">3,000</a> MW by 2030	N/A

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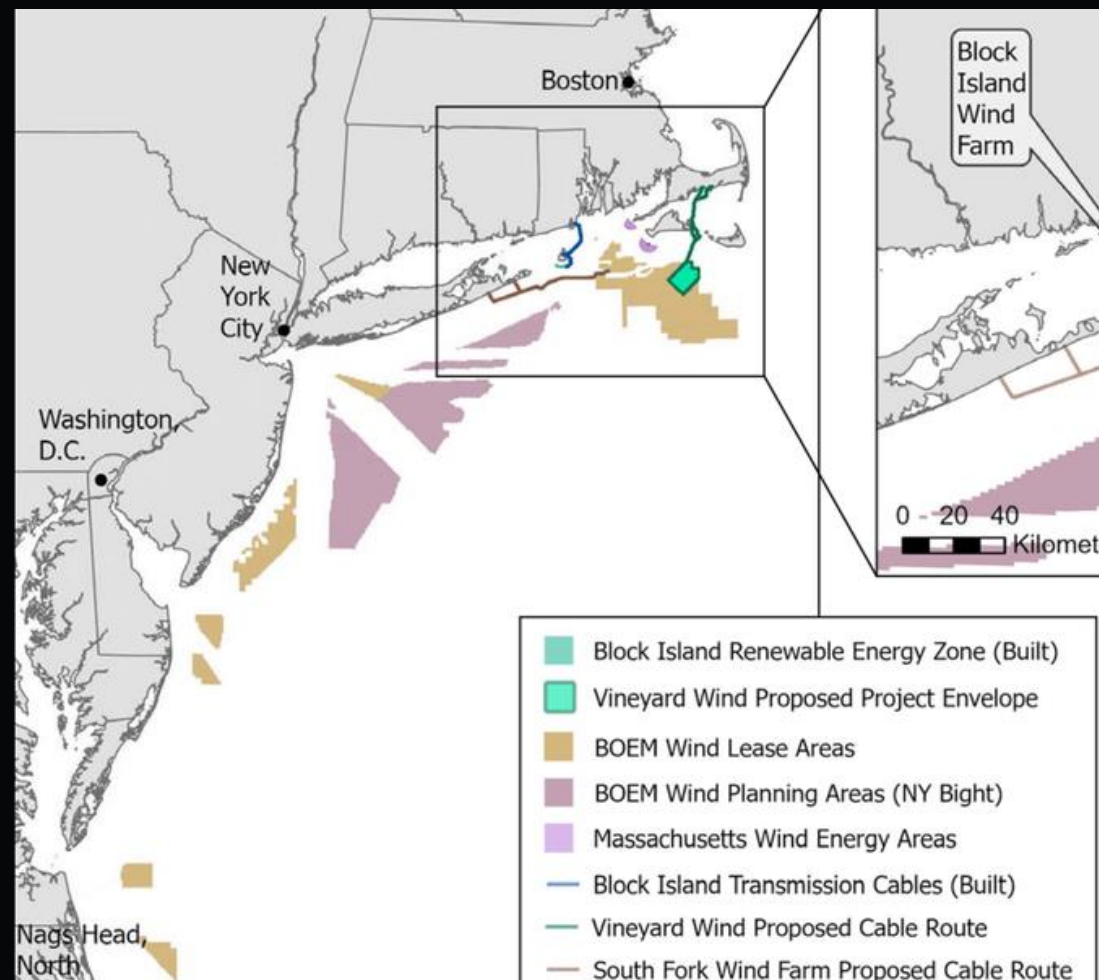
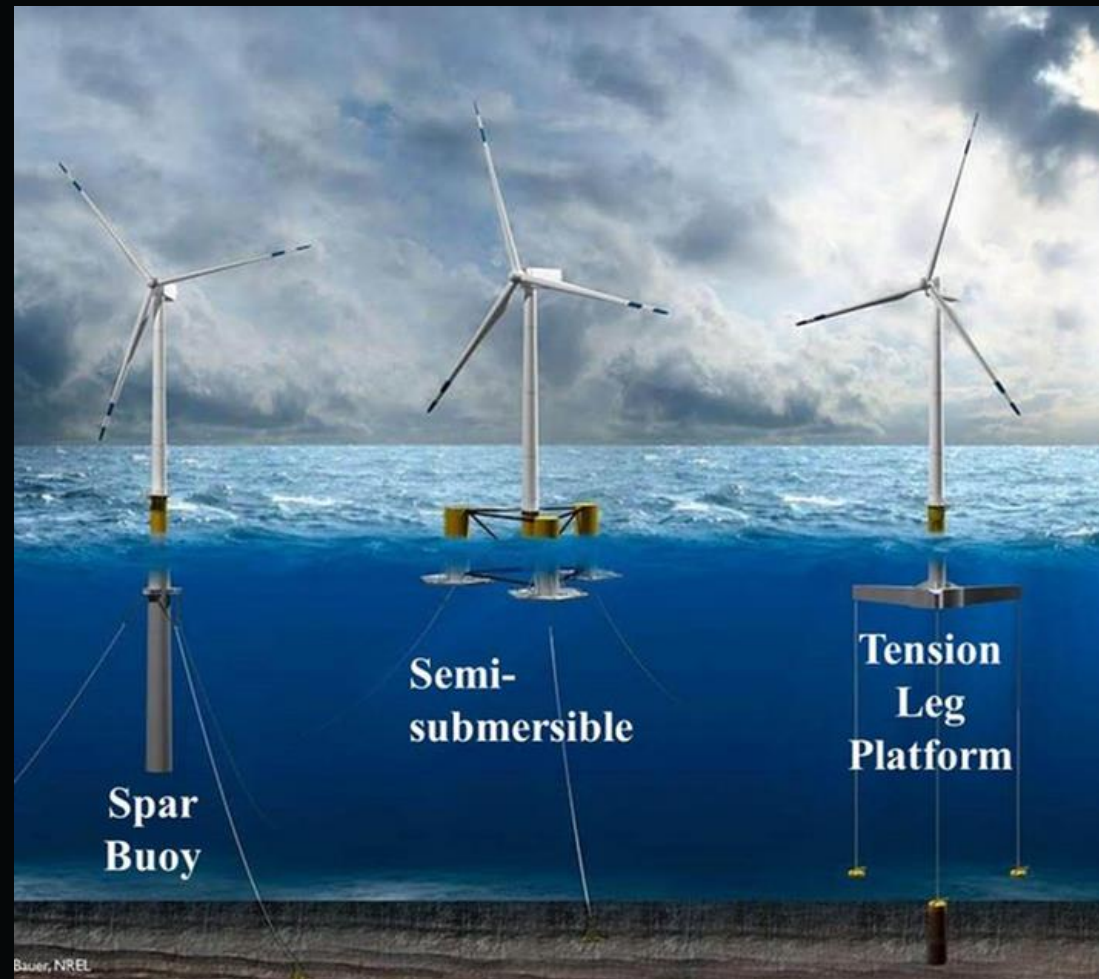
# Technology & the Growth of the Wind Turbine



## OFFSHORE SECTOR OUTLOOK

# Wind Market Outlook in the U.S.

Over 18,000 MW of planned capacity is awaiting approval from the Bureau of Ocean Energy Management (BOEM).



## 1 PROGRESS:

- Majority of planned offshore wind projects remain in the permitting process

## 2 LOCATION:

- Projects are all along the Eastern Seaboard of the U.S

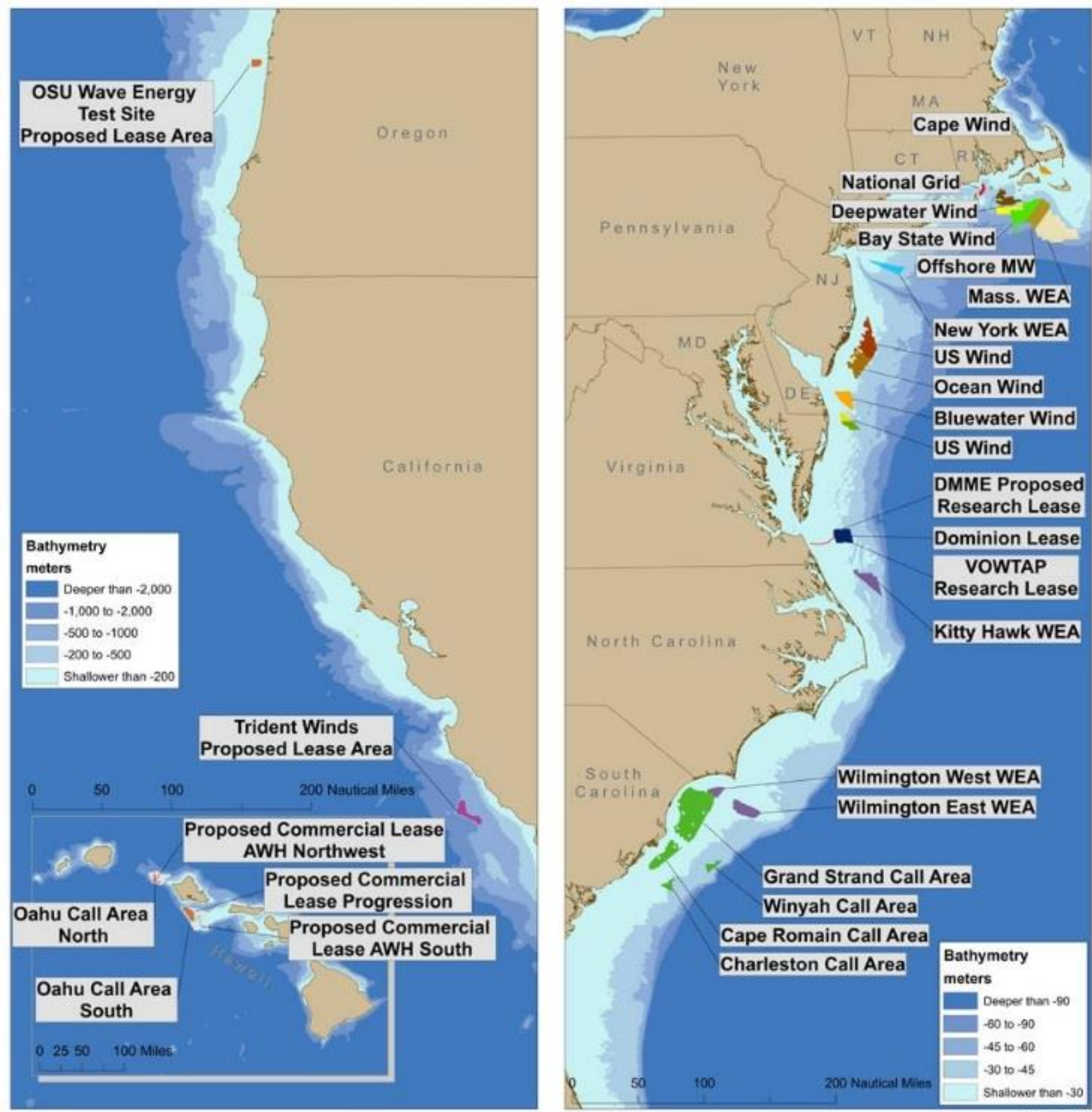
## 3 POTENTIAL:

- The Western Seaboard of the U.S. has significant potential for renewables

OFFSHORE SECTOR OUTLOOK

Wind Market Outlook in the U.S.

- BOEM plans to hold 7 new offshore leases by 2025
- 2 leases off the coast of North Carolina (2022)
- 6 leases in the New York Bight wind energy area
- Leasing, state procurement of electricity, and regional transmission remain siloed from each other, which will only be remedied with an integrated approach to leasing, procurement, and transmission could accelerate projects and reduce some of the barriers facing developers



Source: BOEM

Figure 2.5. BOEM-defined areas for potential renewable energy development as of August 2016

OFFSHORE SECTOR OUTLOOK

# Oil and Gas Market Outlook in the U.S.





## OFFSHORE SECTOR OUTLOOK

# Oil and Gas Outlook in the U.S.

- Despite a slow start due to the lag with the issuance of leases by the current administration, the offshore drilling market in the U.S. experienced significant growth
- The U.S. 5-year offshore oil plan (required by federal law) exists in conflict with 2022's sweeping climate change and clean energy laws. It is a political hot potato for the Biden administration
- The plan was designed to ensure the U.S. government keeps some offshore leasing in play, and makes the selling of leases for offshore wind projects the priority, contingent on recent offshore oil auctions



## OFFSHORE SECTOR OUTLOOK

# Oil and Gas Outlook in the U.S.

For U.S. diving contractors, the market is still two-tiered, with the pie shrinking for eligible contractors to work for super-majors

The bulk of the work is with mid-majors and independents

Offshore drilling is becoming more popular since many of the onshore options are already found or depleted

Industry must continue to expand its fields to keep up with rising demand and depleting resources



## ANSI/ADCI-01-202X



Because the Association of Commercial Diving Educators (ACDE) is basically a defunct association, the ANSI/ACDE-01-2015 was left to lapse and was subsequently removed by ANSI as an existing standard in 2022

## ADCI Attains ANSI Standing Member Status and Pursues Accredited Standards Developer (ASD) Designation

- The ADCI is now a standing member of ANSI and will become an Accredited Standards Developer (ASD). The new ANSI Standard Planning Committee is working on the template and format of the new standard looking at such examples as ADAS and IDSA. There is also much to be gained by looking at the verbiage and syntax of these two standards
- ANSI has very strict guidelines for Accredited Standards Developers, with transparency being the hallmark of the drafting, consensus, and review processes
- Standard will have two pathways for students to choose from (basic only or basic + international endorsement)

## ANSI/ADCI-01-202X



Present Status

## ADCI Attains ANSI Standing Member Status and Pursues Accredited Standards Developer (ASD) Designation

- The status with our application:
  - Cleared initial 30-day comment period
  - Application currently sits with the ANSI Executive Subcommittee for review and comment
  - Should we meet no resistance there, they will refer it to the full Executive Committee, which we anticipate will be successful
  - We hope to have an answer and accreditation by mid or the end of November – there is no official timeline
  - Our Drafting Committee has been identified and briefed that we cannot begin with standards development until we are accredited



# International Consensus Standards for Commercial Diving and Underwater Operations 6.5

- The public comment period on the proposed revisions to CS edition 6.5 concluded on 1 August 2023

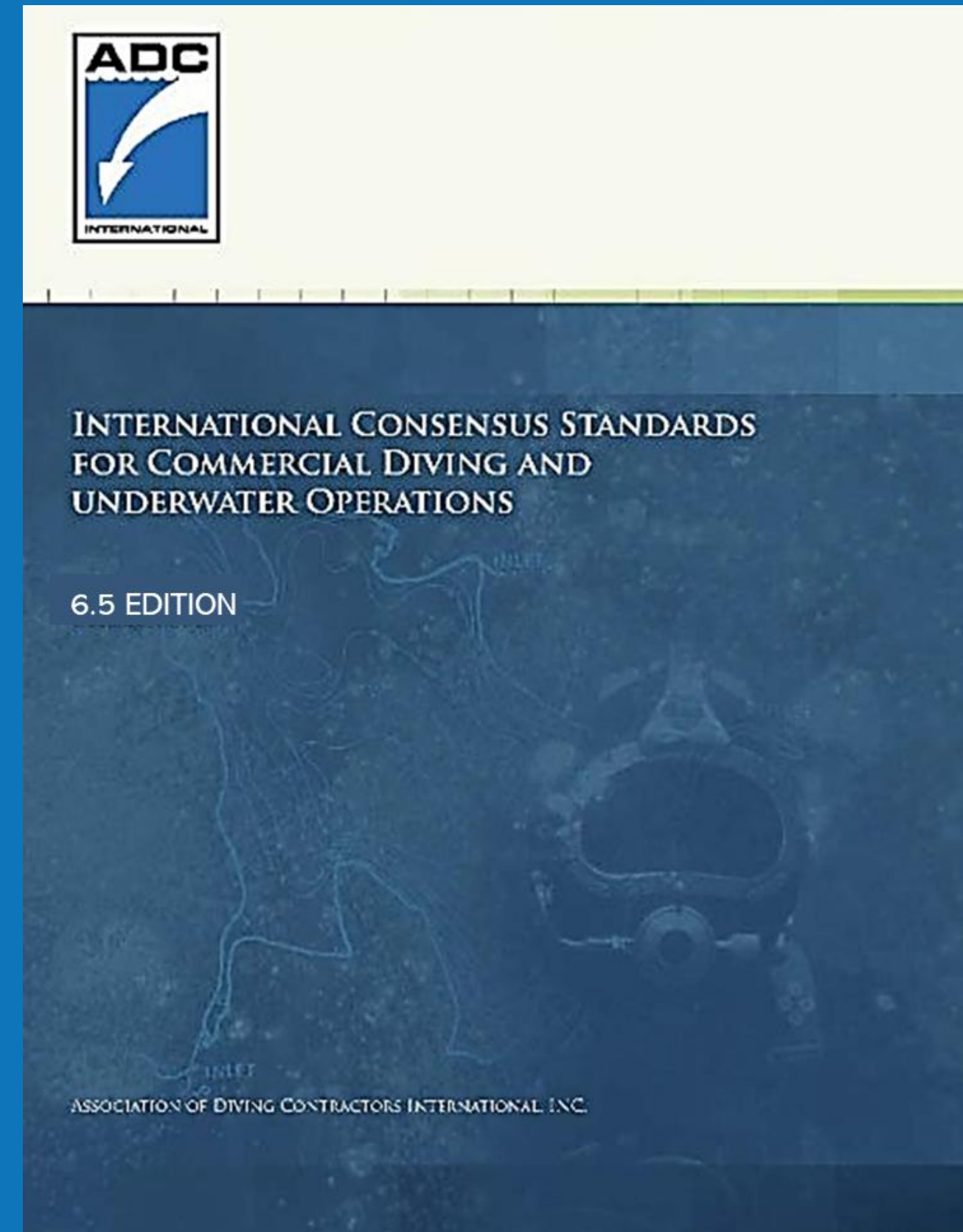
There were three (3) areas that drew the most comments from the public.

- Proposed revisions to the SCUBA subsection - **Completed**
- Cap on SSA diving to a depth of 165 FSW (50 MSW) - **Completed**
- Requirement for a surface standby diver and tender, when there are two divers in the water. [In the past, if you had two divers working in proximity of each other they could serve as standby divers for one another]

These three items have gone back to the Safety and Technical Committees to address the comments and concerns submitted

- All other proposed revisions will go before the Board of Directors for ratification. The scheduled release is set for the end of the 4th quarter of 2023

**ADCI will require helmets and masks to receive their annual external/internal inspections from a current manufacturer's certified technician**



# Diving Safety Management Systems

Requirement for all contractors and schools to have a defined diving safety management system (DSMS), the Association will spend 2024 educating the membership on the components of a DSMS

**ADCI has contracted “DSMS” (a 3<sup>rd</sup>-party company and ADCI Associate Member) to assist the Association in the development and implementation of a diving safety management system. This package will include a description of expectations, specifications, standards and guidance that the ADCI will use to qualify a member contractor’s/school’s occupational health and safety management system**

- Development of an OHS management system framework specification that is universally scalable to fit ADCI member company/school characteristics and mission
- Leverage industrial standards for OHS management systems already in practice, such as ISO 45001, OSHA and other applicable HSE practice
- Documents that would communicate the OHS management specifications and guidelines to ADCI members
- Assessment tools, checklists, and training modules ADCI would use to assess member’s OHS management systems

# ADCI Audit Requirements for Contractors and Schools (May 2024)



ADCI's Audit Requirements for Contractors and Schools aims to advance Safety Protocols and Compliance Culture in Accordance with International Consensus Standards for Commercial Diving and Underwater Operations 6.5, within its membership and the wider diving industry

## AUDIT SCHEDULE FOR ADCI MEMBERS

As previously reported, the ADCI has instituted a five-year audit schedule for contractors and a two-year audit schedule for its associate member schools

The program is scheduled to kick off in May 2024, with new workshop attendance requirements for its auditors

Auditors will also need to go through the Kirby Morgan Helmet and Mask Technician Course

A white paper and instruction/familiarization video will be developed to answer contractors' or schools' FAQs

All industry and chapter meetings will cover this requirement and allow for discussion on any new components of the ADCI audit reports

# Underwater Intervention / International WorkBoat Show 2023

This is the first year back for Underwater Intervention since U.I. 2020

The show will be held in conjunction with the International Workboat Show at the Ernest Morial Convention Center in New Orleans, 29 November – 01 December 2023

The U.I. Technical Program will be the most robust in the history of the show, covering commercial diving, manned submersibles, workforce development for the blue economy, remotely operated vehicles, survey & mapping, and unmanned undersea vehicles. There will also be a think tank and numerous panel discussions covering today's industry challenges

Anticipated floor traffic is calculated to exceed 15K attendees/exhibitors, making this the largest show for both Underwater Intervention and the International Workboat Show

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NEW ORLEANS**

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**QUESTIONS?**

# Acknowledgements

We thank you for your continued support in our efforts to contribute to the safety and prosperity of the diving industry

## Contact

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