

Powering Offshore Wind

Introducing our Supply Chain
Investment Programme

June 2025



CONTENTS

Part 1: Introduction

- 02 Foreword
- 03 The need for new enabling infrastructure

Part 2: Signpost, Stimulate, Invest

- 04 Supporting the sector
- 05 Signpost: Marine Delivery Routemap
- 06 Stimulate: Supply Chain Accelerator
- 07 Invest: Supply Chain Investment Programme
- 09 Sustainable development
- 10 Coordination with other investors and stakeholders

Part 3: What next?

- 12 Next steps for developers and promoters of enabling infrastructure

Part 4: Appendices

- 13 Target investment sectors
- 14 About The Crown Estate



Foreword



Gus Jaspert
Managing Director Marine



Ben Brinded
Head of Investment

At The Crown Estate, our role is to serve the long-term national interest. As we look to build our impact, we are increasing investment in key areas such as science and innovation, housing, regenerative agriculture and renewable energy, with our flexibility to invest enhanced through the recent passing of the Crown Estate Act 2025. In the offshore wind sector, we are planning to invest up to **£400 million** to help build the UK supply chain through our **Supply Chain Accelerator** and **Supply Chain Investment Programme**.

The UK is home to one of the world’s most attractive markets for offshore wind, and we are proud to be fostering the growth of a sector that now has 15.9GW of grid-connected capacity, generating enough renewable energy to power half of all UK homes¹. With a robust pipeline of 95GW, offshore wind is set to play a pivotal role in supporting the UK’s ambition to deliver clean power by 2030 and net zero by 2050.

Our work to support the offshore wind sector is driven by the **Marine Delivery Routemap**, our strategic delivery plan covering all of the sectors that operate on the seabed. This plan will provide greater visibility on the future pipeline of offshore wind projects, informing the supply chain and infrastructure needs of the sector.

Insufficient supply chain capacity is widely recognised as one of the key constraints to further offshore wind deployment, and significant investment is required in establishing appropriate onshore enabling infrastructure such as ports, supply chain manufacturing, and research and testing facilities. Building this infrastructure

will allow the UK to deliver on its plans for net zero and will create economic and employment opportunities for local communities.

In this document, we outline The Crown Estate’s intended approach to making direct investments in enabling infrastructure for the offshore wind sector.

We are proposing to invest up to £400 million of capital in the sector: £50 million through our **Supply Chain Accelerator Programme** supporting early-stage project development, and up to £350 million of capital funding in the medium term through our **Supply Chain Investment Programme**.

We encourage owners and developers of port and supply chain infrastructure projects supporting the offshore wind sector to approach us and we welcome the opportunity to discuss your project and how we can support you through our **Supply Chain Accelerator** or **Supply Chain Investment Programme**.



£350 million

of capital available through our Supply Chain Investment Programme



£50 million

of capital available through our Supply Chain Accelerator

¹ 49.2TWh of power generated UK-wide in 2024, equivalent to the annual electricity needs of 52% of UK homes (UK Offshore Wind Report 2024)



43-50GW

operational offshore wind generation capacity required by 2030²

£12 billion

identified investment needs in the UK supply chain when also considering port infrastructure⁴

The need for new enabling infrastructure

The UK Government sees a need for 43-50GW of operational offshore wind generation capacity by 2030 under their Clean Power mission², compared to 15.9GW operational today. This will require a major ramp up in deployment, with around 6GW of new capacity deployed each year compared to around 1GW per year historically. The supply chain necessary to support this scale of deployment does not currently exist.

In addition, the conclusion of Offshore Wind Leasing Round 5 will crystallise the demand for new floating wind supply chain capabilities³ and the necessary enabling infrastructure in the proximity of the Celtic Sea.

The **Offshore Wind Industrial Growth Plan** identifies investment needs of up to £2.8 billion in the UK supply chain. When also considering port infrastructure, we estimate an investment requirement of over £12 billion in the coming years⁴. This enabling investment is over and above the investment required in offshore wind projects themselves and a significant proportion will be needed ahead of wind farm construction.

Development of new port and supply chain infrastructure requires significant capital investment and long development and construction periods. Ahead of making an investment decision, visibility is required around the orderbook and utilisation of the facility.

However, wind farm developers cannot make committed orders until their projects are sufficiently progressed through the grid connection process, planning, obtaining Contract for Difference support and raising the necessary financing. This can result in the enabling infrastructure not being ready in time to deliver the relevant offshore wind farm projects.

This widely recognised “market failure” requires co-ordinated activity across the public and private sectors to overcome the challenges and fully realise the economic, social and environmental potential of the offshore wind sector.

² [Clean Power 2030 Action Plan, December 2024](#)

³ [Supply chain for Celtic Sea floating wind farms could power 5,000 new jobs and a £1.4bn boost for the economy](#)

⁴ Internal estimate by The Crown Estate, considering £2.8 billion [Offshore Wind Industrial Growth Plan](#), £6.5 billion [Strategic Investment Model](#), and £3-4 billion [RUK Industry Roadmap 2040](#)

Supporting the sector

We are undertaking three distinct activities to support the development of port and supply chain infrastructure for offshore wind: Signpost, Stimulate, Invest.



1 Signpost

To provide greater visibility and clarity to the market on future offshore wind leasing and the required enabling infrastructure, we are creating the Marine Delivery Routemap.

See **page 5** for further information

2 Stimulate

To support early-stage project development, we have established the £50 million **Supply Chain Accelerator**.

See **page 6** for further information.

3 Invest

To invest in the construction of new port and supply chain infrastructure, we intend to make available up to £350 million of capital through our **Supply Chain Investment Programme**.

See **page 7** for further information.

1 Signpost: Marine Delivery Routemap

The UK needs to make the most of its marine environment to deliver economic growth and clean power, while protecting nature. As demand on the seabed and coastline increases, coordination and spatial constraints will restrict the ability for each sector to reach its full potential unless there is a long-term, holistic approach to manage these competing priorities.

Offshore wind is one of multiple sectors operating on the seabed, and the long-term success of the sector requires careful planning. The **Marine Delivery Routemap** is The Crown Estate's strategic delivery plan for the seabed and coastline around England, Wales and Northern Ireland, which will support all marine industries as well as the need to tackle biodiversity and nature recovery. It will involve dynamically modelling and mapping potential use scenarios over coming decades to ensure appropriate scenario planning and spatial coordination.

The Marine Delivery Routemap will consist of interactive digital mapping, a long-term delivery plan, economic and environmental modelling and a shared evidence base to inform decision-making.

The Marine Delivery Routemap will provide greater visibility, certainty and predictability for all sectors including Offshore Wind, which will help underpin investment and create jobs and regeneration opportunities across the UK.

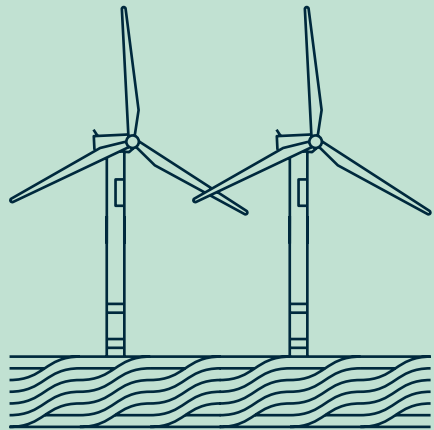
Its intention is to:

- Map the best use of the seabed and coastline, including showing what energy, infrastructure and nature investments might take place and when.
- Speed up clean energy projects and critical infrastructure by planning what we need to do to accelerate delivery (for example environmental surveys and grid connections).
- Encourage investment in UK supply chain opportunities so communities can plan and benefit from this investment (for example through developing local skills).



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2 Stimulate: Supply Chain Accelerator



£50 million

of capital available through
our Supply Chain Accelerator

The Supply Chain Accelerator programme provides early-stage development funding to offshore wind supply chain projects, with the aim of accelerating and de-risking them, creating investable propositions to drive subsequent investment and construction.

In December 2024 we announced funding of £5 million to the first 13 projects which will all support the deployment of floating offshore wind in the Celtic Sea.

In April 2025 we launched the second round of the Supply Chain Accelerator, with an expanded scope to cover fixed and floating offshore wind ports and supply chain projects UK-wide. Businesses can apply for up to £1.5 million per eligible project, with The Crown Estate providing 50% match funding. We intend to continue to run subsequent rounds in the coming years, with a total of £50 million available.

As successful projects progress through development, we will consider further investment through our **Supply Chain Investment Programme** (see **page 7**) .

For further information on the Supply Chain Accelerator, please visit our [website](#).



SUPPLY CHAIN ACCELERATOR CASE STUDIES



HR Wallingford

Establishing a national deepwater testing facility for research and development in floating offshore wind technology.

Photo © HR Wallingford

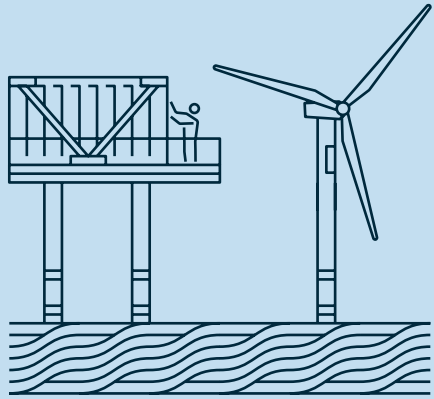


Hutchinson

Delivering anchoring systems, secondary-steelwork and rolled-products at industrialised-scale for the floating and wider offshore wind market.

Photo © Hutchinson

3 Invest: Supply Chain Investment Programme



£350 million

of capital available through our Supply Chain Investment Programme

Building on the new investment powers conferred by the Crown Estate Act 2025, The Crown Estate is establishing the **Supply Chain Investment Programme** to invest in supporting the construction of port and supply chain infrastructure to enable accelerated delivery of UK offshore wind projects.

The Crown Estate intends to make available up to £350 million of capital through the **Supply Chain Investment Programme** over the medium term.

This programme will provide capital investment to fund project construction but could also include development funding for larger projects which cannot be funded by the Supply Chain Accelerator.

We recognise the scale of investment needed, and will invest alongside private sector investors and developers to maximise the impact of our investments. In many cases, government support may also be required to ensure the projects are successful.

The investment criteria for the **Supply Chain Investment Programme** are set out on the **next page** and the target sectors for this investment are detailed in the Appendix on **page 13**.

“We welcome The Crown Estate’s continued commitment to the offshore wind supply chain and are excited about the opportunities which will be available through their investments.”

Tim Pick, Chair, Offshore Wind Growth Partnership



Investments are subject to approval of our Board and are expected to be considered based on the following criteria:

Strategic need

Enabling deployment of offshore wind in the UK

Investment will be targeted in ports, supply chain manufacturing and research and testing facilities, as further detailed in the Appendix on **page 13**.

Geographic scope

We can invest in projects in England, Wales, Scotland and Northern Ireland. We will seek to prioritise projects which support offshore wind development in the geographical areas identified through existing leasing rounds and the Marine Delivery Routemap, for example the Celtic Sea (area of Leasing Round 5) and the North East (where there is significant potential for future leasing activity as set out in the **Future of Offshore Wind Report**).

The Crown Estate’s approach

Investment size

There are no specific restrictions on the size of investment if the project fulfils an industry need. However, we are seeking to build a diversified portfolio and would expect to commit between £10 million and £50 million to an individual project.

Flexible transaction structuring

Following the passing of the Crown Estate Act 2025, investments could be in the form of a minority equity investment, loans, or freehold or leasehold interests in land or property, depending on the risk profile and the needs of the project.

Time horizon

We recognise that infrastructure assets have a long operational life and see ourselves as long-term holders of these investments. We will however require the flexibility to exit in the medium-term where it makes sense.

Project stage

We would predominantly invest in the construction of new infrastructure at either existing or greenfield sites. Development funding for larger projects which are not supported by the Supply Chain Accelerator can also be considered.

Financial returns

The Crown Estate invests on behalf of the UK public, with its profits reinvested or returned to the Treasury. We cannot provide grants or subsidies and any investments will need to generate an appropriate financial return based on the risk profile of the project. However, we recognise that there is significant revenue uncertainty and volatility in the initial years for some of these enabling infrastructure projects. We are prepared to share the risk and accommodate short-term volatility in order to realise long-term financial value.

Responsible investment

Aligned partners

Our aim is to partner with enabling infrastructure developers and investors who are aligned to our values and looking to responsibly facilitate the deployment of offshore wind. We will often act as a joint or minority investor and will require appropriate governance rights to protect our interests and those of the nation.

Health and safety

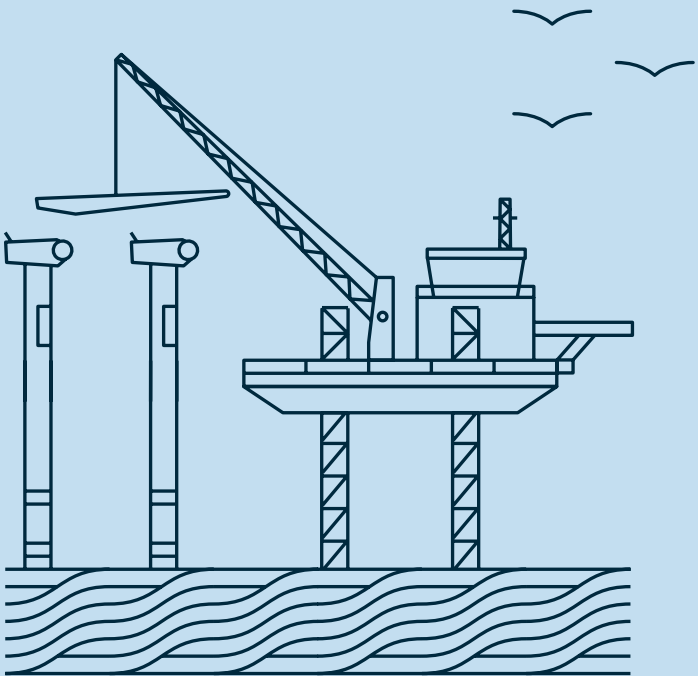
The Crown Estate has a Safety First approach and will require projects to demonstrate adherence to this principle to ensure the safety and wellbeing of any staff involved in the development, construction and operation of the project, as well as members of the public.

Sustainable development

We will seek to ensure that the principles of sustainable development are embedded within any projects we invest in. We have developed an approach to help developers identify opportunities to develop projects in a more sustainable way, as set out on **page 9**.

Complementary approach

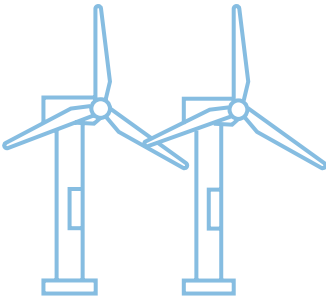
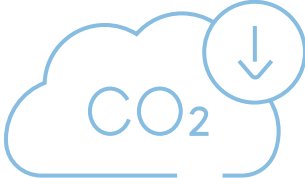

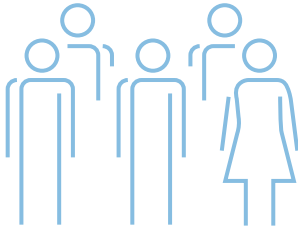
The Crown Estate remains responsible for leasing of the seabed to wind farm developers, and we see investment in enabling infrastructure as complementary to this activity. The Crown Estate has clear governance frameworks in place, and will ensure that any potential conflicts of interest are managed appropriately and aligned with best practice corporate governance standards.



Sustainable development

The Crown Estate is committed to the sustainable development of infrastructure. Recognising that every project is unique, we will work with our partners to develop a shared sustainability vision for each project. We will aim to identify the most material sustainability issues and opportunities relevant to each investment and build these into a bespoke sustainable development plan. Projects will then be required to collect data and report regularly on the agreed elements of the plan.

SUSTAINABLE DEVELOPMENT OPPORTUNITIES

			
Enabling UK net zero and energy security	Decarbonisation	Nature	Social impact
Maximising the positive impact that the project has on enabling the deployment of offshore wind.	Reducing the carbon impact of project construction and operations by: <ul style="list-style-type: none">• Utilising energy from renewable resources where possible and minimising use of fossil fuels• Considering use of low carbon materials for construction• Improving energy efficiency	Generating additional nature value beyond statutory requirements, for example through biodiversity initiatives.	Creating jobs and training opportunities, generating economic growth, and considering the regions where investment is most needed.

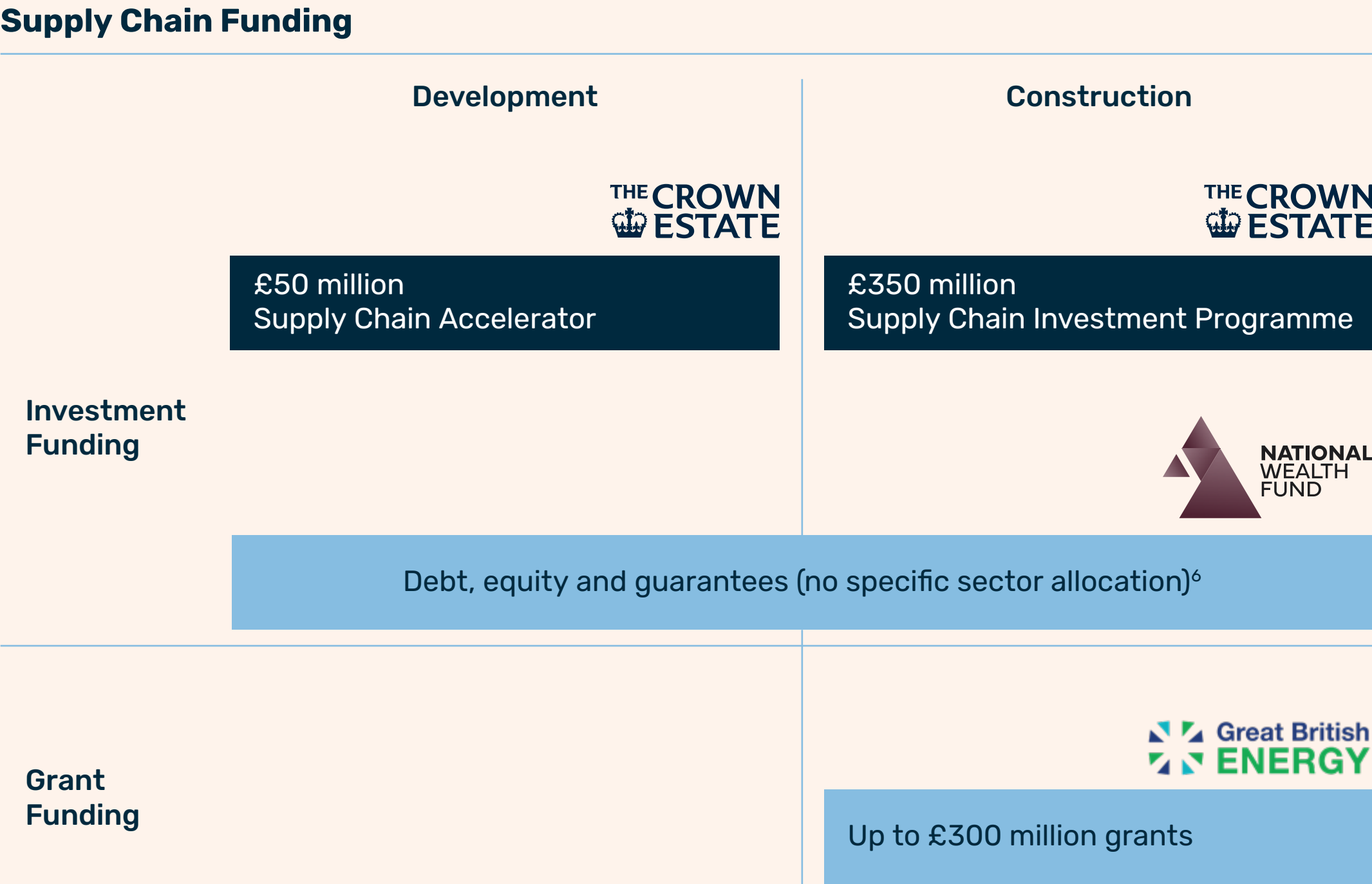


Coordination with other investors and stakeholders

To invest our capital in the most effective and impactful way, we will work in coordination with other co-investors from the private and public sector, including Great British Energy and the National Wealth Fund.

In addition to other public sector investors, we also work closely with the private sector through the Offshore Wind Growth Partnership, which acts as the Delivery Body for the Offshore Wind Industrial Growth Plan. Funding to deliver on this ambition comes from The Offshore Wind Industry Council, which represents the offshore wind industry, including developers and supply chain.

In March 2025, the Chancellor announced the creation of a new Strategic Public Investment Forum⁵. This forum, amongst others, will allow the various bodies to cooperate to ensure they best support the investment needs of infrastructure projects.



5 [Launch of the UK Strategic Public Investment Forum - GOV.UK](#)

6 £5.8 billion to be committed over this Parliament to five sectors including ports and supply chain

Great British Energy

Great British Energy is a publicly owned energy company with a focus on the development, construction and operation of clean energy projects.

As part of the Great British Energy: The Crown Estate partnership, Great British Energy will explore options to invest in future rounds of the Supply

Chain Accelerator. In that scenario, the programme would continue to be delivered by The Crown Estate on behalf of the partnership.

In addition, Great British Energy has recently announced up to £300 million of targeted grant funding to support offshore wind supply chains with a focus on boosting domestic jobs, mobilising additional private investment, and securing new manufacturing facilities⁷. This funding will be deployed predominantly as targeted grants to support and unlock UK supply chain projects alongside investments by The Crown Estate, the National Wealth Fund and/or other public finance institutions (where appropriate). This will ensure that the public sector receives the benefit of an appropriate return for the risks that it is taking.

Funding will be available from April 2026, with the application window opening late 2025 / early 2026. Great British Energy will potentially support strategic projects sooner, in support of investments made by other public finance institutions.



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£300 million

Great British Energy has recently announced up to £300 million of targeted grant funding to invest in offshore wind supply chains

£5.8 billion

to be committed by The National Wealth Fund over this Parliament to five subsectors including ports and supply chains

National Wealth Fund



The National Wealth Fund is the UK government's principal investor, at the forefront of investing public money in support of the government's growth and clean energy missions. Capitalised with £27.8 billion in total, it will commit at least £5.8 billion over this Parliament to five subsectors including ports and supply chains.

The Crown Estate will work closely with the National Wealth Fund to support and explore potential co-investments in offshore wind port and supply chain infrastructure.

Where a project aligns with both parties' investment mandates, we will work together to determine whether one of us is better placed to support the project, or whether we can co-invest.

For co-investments we will aim to structure the investment to best support the project and deliver appropriate returns for the nation.

7 [Prime Minister launches major boost for UK clean energy industry - GOV.UK](https://www.gov.uk/government/news/prime-minister-launches-major-boost-for-uk-clean-energy-industry)

Next steps for developers and promoters of enabling infrastructure

The Crown Estate recognises the strategic requirement and benefits of establishing new port and supply chain infrastructure that can support the development of offshore wind in the UK.

For projects in which we invest, The Crown Estate can help to facilitate project delivery in the following ways, in addition to providing capital:



Development expertise

We can support in navigating challenges including site selection, site acquisition, planning, financing and contract negotiations, as well as building a business case for the project.

Offshore wind market knowledge

We have a clear understanding of long-term demand for enabling infrastructure given our unique role in spatial mapping and running leasing processes.

Convening

We can assist in engagement with local and national government agencies, offshore wind developers, funders and other stakeholders, helping to de-risk projects.



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GET IN TOUCH:

Supply Chain Accelerator

For those seeking match funding for development, please apply for funding through the Supply Chain Accelerator. Please see our [website](#) or contact:

accelerator@thecrownestate.co.uk

Supply Chain Investment Programme

For those seeking capital funding or projects with larger development funding needs, we would welcome a discussion with you. Please contact:

scip@thecrownestate.co.uk

Target investment sectors

For both the **Supply Chain Accelerator** and the **Supply Chain Investment Programme**, The Crown Estate is targeting investment in ports, supply chain manufacturing and research and testing facilities, as detailed below, where the strategic requirement for investment has been identified through research.

Sector	Subsector	Description	Evidence of need
Ports	Offshore wind installation facilities	Large facilities to support marshalling, installation and floating wind integration, well-located for future offshore wind deployment	Offshore Wind Manufacturing Investment Scheme (OWMIS) Ports for Offshore Wind: The Net Zero Opportunity (Crown Estate Scotland) Floating Offshore Wind Manufacturing Investment Scheme (FLOWMIS) RUK Industry Roadmap 2040 Port and Manufacturing Investment Models (Offshore Renewable Energy Catapult, WSP) The Crown Estate’s updates on Offshore Wind Leasing Round 5
	Ports to support major manufacturing eg foundation/substructure, turbines	Industrial sites to be used by offshore wind supply chain manufacturers, with proximity to a quay to receive raw materials and ship finished products, UK-wide	
	Ancillary smaller ports and wet storage	Smaller facilities to support offshore wind installation activities, operations & maintenance, smaller scale component manufacturing, wet storage facilities	
Manufacturing	Advanced turbine technology	Turbine blades Turbine towers	
	Industrialised foundations and substructures	Deep water foundations (steel and concrete) Mooring and anchors (for floating wind)	
	Future electrical systems and cabling	Static and dynamic array cables Offshore export cables	
	Next-gen installation, operations and maintenance (O&M)	O&M vessel fabrication facilities O&M facilities	
Technology development/ R&D Facilities	A national innovation hub	New late-stage testing at an Offshore Wind Innovation Development Demonstration (WinDD) Hub across blades, towers, cables, foundations, installation and O&M techniques	Offshore Wind Industrial Growth Plan
	New advanced turbine technology institute	As part of the WinDD Hub, an advanced turbine technology institute to develop the next generation of turbines blades and components	

About The Crown Estate

The Crown Estate's role is to work in the long-term national interest.

Established by an Act of Parliament, we are an independent and commercial business. We manage a diverse £16 billion portfolio of land, property and the seabed across England, Wales and Northern Ireland. Our profits, which have totalled more than £4 billion over the last ten years, are returned to the Treasury for public spending.

Through our activities and investments we are growing our portfolio's value and using it to positively impact climate, nature and communities both now and for future generations.

Our purpose, to create lasting and shared prosperity for the nation, guides us and underpins our strategy to focus on addressing key national challenges where we can make a meaningful impact. This includes investing and playing a significant role in delivering net zero and energy security; nature recovery and biodiversity; and inclusive communities and economic growth, all while generating financial returns for the UK.

To learn more about the work we do, visit [Home | The Crown Estate](#)

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The Crown Estate
1 St James's Market
London SW1Y 4AH

+44 (0) 20 7851 5000
@TheCrownEstate
thecrownestate.co.uk

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ESTATE
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