UK Offshore Wind Report 2025

Celebrating 25 years of offshore wind in the UK

THE CROWN ESTATE

Contents

This report is produced annually by The Crown Estate to provide an overview of the UK offshore wind industry, using our own and publicly available data.

The Crown Estate's role is to put the nation's interests first.

Established by an Act of Parliament, the Crown Estate Act 1961, amended by the Crown Estate Act 2025, we are an independent and commercial £15 billion business. We manage a diverse portfolio of land, property and the seabed across England, Wales and Northern Ireland. Our profits, which have totalled more than £5 billion over the last ten years, are returned to the UK Government 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 and the UK's finances, today and for generations to come.

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 enabling energy and climate resilience, protecting and restoring nature, and supporting inclusive growth that enables communities to thrive, all while responsibly generating financial returns for the UK.

To learn more about the work we do, and the causes we support, visit **Home I The Crown Estate**

Crown Estate Scotland is a public corporation which manages a range of property, including the seabed, to deliver lasting, valuable benefits to Scotland and its people. Crown Estate Scotland's revenue profits are paid to the Scottish Government for use in public spending. Part of our role is awarding the rights to build and operate renewable energy projects in Scottish waters, and we are committed both to supporting the development of Scotland's blue economy and the Scottish Government's target of reaching net zero emissions by 2045.

To learn more about the work we do and the causes we support, visit **crownestatescotland.com**

Acknowledgements

Our thanks to all those who have provided content, in particular:

Balfour Beatty; Ben Barden Photography; CHPV Offshore Film & Photography; Chris Henderson Photography; Crown Estate Scotland; DESNZ; Dan Bolt; Diamond Transmission Partners; Equitix; Frontier Power; G+; Global; James Lord (RenewableUK); Jason Hawkes; Kirsty Andrews; Malcolm Nimmo; Offshore Wind Industry Council (OWIC); Ofgem; Ørsted; Principle Power; Seaway7; Siemens Gamesa; Sofia Offshore Wind Farm; Transmission Capital Partners; World Forum Offshore Wind.

Wind farm technicians inspecting a turbine blade

Foreword

Welcome to the 2025 Offshore Wind Report which covers the 25th anniversary year of the UK offshore wind sector and celebrates its incredible growth over the last two and a half decades. This year's report is packed with examples of the value UK offshore wind now delivers for households, communities and the nation, and how it is powering ahead, thus writing the next chapter in this extraordinary story.

Gus Jaspert CMG
Managing Director, Marine,
The Crown Estate

Julia Rose
Head of Offshore Wind,
The Crown Estate

We'd like to take a moment to reflect on this remarkable milestone. In December 2000 the UK's first offshore wind farm began to generate power from two 2MW turbines. 25 years later, the sector has become one of the UK's greatest industrial success stories and a vital part of our country's infrastructure. It is driving the UK's clean energy transition, capable of producing enough power for 15.5 million homes, and hosts the biggest offshore wind development pipeline in Europe.

This achievement is not just about gigawatts and clean power. Built over decades, today's mature sector will play a critical long-term role in strengthening the UK's energy security and resilience and realising huge social and economic opportunities. The energy independence it enables helps to mitigate the impact of fluctuating gas prices on households, while supporting new jobs, regional regeneration and economic growth across the UK for generations to come (see more on **p. 12**).

Getting to this remarkable milestone has been a team effort on a colossal scale, including governments, regulators, developers, investors, the supply chain, statutory stakeholders, communities and many more. Working in partnership, these pioneers have backed the technology, created a stable policy and regulatory framework, delivered an attractive Contracts for Difference (CfD) scheme, put nature at the heart of decision-making and created a system that is fit for delivering an energy transition at scale, whilst fostering innovation. When faced with challenges such as global volatility, economic uncertainty, rising prices and international competition, the whole sector has responded with commitment, ingenuity and resilience. This collective effort and pioneering spirit has made the UK an enticing home for offshore wind.

At The Crown Estate, we're proud of the role we've played in this story. Taking a long-term view is part of our remit, thinking beyond market and political cycles and considering how our actions can benefit future generations. From the very beginning we've combined this with our independence and resources, to act as a catalyst for the sector.

We've committed financial support for early projects, invested in technical innovations such as cost-reduction pathways, pioneered spatial analysis techniques to identify optimum sites for wind farm locations, and invested in supply chain development. These have contributed to the resilient processes and robust decision-making which have become a hallmark of UK offshore wind.

While it's a timely moment to look back, we have our eyes fixed firmly on supporting the future growth of the sector. We continue to use our unique status to bring a wide range of stakeholders into the conversation about the sector's long-term growth and explore how sectors can co-exist in the busy marine space. This is brought to life through broad collaboration to develop The Crown Estate's Marine Delivery Routemap, a pioneering digital platform to model and map potential use scenarios for the seabed and coastline over the coming decades. This represents a fundamental shift in our ability to analyse, visualise and engage with partners about future sea uses.

> "The sector has become one of the UK's greatest industrial success stories and a vital part of our country's infrastructure."

Julia Rose
Head of
Offshore Wind,
The Crown Estate

Our commitment to bring parties together to unlock future growth can also be seen in our work with the **Offshore Wind and Carbon Capture, Usage and Storage Co-location Forum**, and our collaboration with the Fishing Liaison with Offshore Wind and Wet Renewables group (FLOWW) to publish a best practice guide for engagement between fishing and offshore renewables. Both are examples of the power of working together to drive positive outcomes for all.

We are using our new investment powers conferred by the Crown Estate Act 2025 to boost the impact we can have. This includes our ambition to invest up to £400 million to build supply chain capability and infrastructure, with 28 projects across the UK already receiving funding, from ports to manufacturing, testing, recycling and education facilities.

The **recent announcement of Offshore Wind Leasing Round 6**, expected to launch formally in the first half of 2027, demonstrates our commitment to maintaining a clear line of visibility for those investing in the UK market.

This report includes many more examples of how the sector, policymakers and key stakeholders are working together strategically to put the UK on an enviable footing for the next 25 years and beyond.

2025 highlights include:

- The UK Government's Allocation Round 7, which culminated in a record 8.4GW of capacity securing CfDs, making it Europe's biggest ever offshore wind auction and signalling a vote of confidence in the UK offshore wind market
- The successful award of seabed rights to world-leading developers for 4.5GW of floating offshore wind in the Celtic Sea, marking a major milestone in Leasing Round 5 and underlining the UK's position as the leading market for innovative floating offshore wind in Europe
- The announcement of £1 billion of public investment, including our own £400 million commitment, to support supply chain growth and the delivery of the Industrial Growth Plan

Recent global volatility has reinforced the critical importance of a domestic renewables sector both now and in the future. These activities, and many more in this report, give us good reason to be optimistic about the contribution UK offshore wind can and will make. Confidence is returning, momentum is building and the sector is more collaborative and more coordinated than at any time in its history. As we look ahead, it is vital that we continue in this vein, working together to send a clear signal that the UK is open for business.

This report would not be possible without the insight and analysis of many of our colleagues and numerous partners and organisations. In particular, Crown Estate Scotland have provided an update on their portfolio of projects which is making great progress with consents determined, leases entered and CfDs secured. Thank you to everyone who has contributed and to all the pioneers across the sector, supply chain, governments, regulators and stakeholders who have helped build this sector into the incredible success story we see today.

Enjoy reading this snapshot of 2025 and here's to a sector gearing up to approach the next 25 years with the same ambition and pace as the last.

Find out more about key activities and progress in 2025:

2025 highlights

For an at-a-glance view of the 2025 offshore wind year in numbers – **2025 highlights**.

25 years of UK offshore wind

More about how offshore wind has been powering value for the nation over 25 years – **pp. 12-13**.

Future pipeline

Potential future capacity and development projects – **pp. 20-23**.

Marine Delivery Routemap

More about our Marine Delivery Routemap and how it is driving strategic planning – **p. 35**.

Helping nature to thrive

For an update on our activities in pursuit of protecting nature and the environment – **p. 36**.

2025 UK Offshore Wind Highlights

54
Offshore wind farms, operational or under construction, in the UK

16.5GW
Grid connected offshore wind capacity

93GW
Pipeline of fixed and floating offshore wind capacity in the UK[1]

3
Floating offshore wind farm projects newly awarded rights in the Celtic Sea, with up to 4.5GW capacity

25years
8 December 2025 marked 25 years since the first UK offshore wind farm became operational[2]

19%
Of the UK's total electricity needs comes from 52TWh of offshore wind

c.40k
Total UK offshore wind workforce, rising to 94,000 by 2030[3]

20.8m
Tonnes of CO_2 displaced[4] by the use of offshore wind energy

54%
UK offshore wind supplied the equivalent electricity needs of 54 per cent of UK households in 2025

1. See pp. 20–23 for more detailed explanation of the offshore wind development pipeline
2. RenewableUK: UK marks historic milestone of 25 years of offshore wind, December 2025
3. Renewable UK: Wind industry skills intelligence report 2025
4. See p. 39 for CO_2 displacement calculation

Offshore wind overview

In just 25 years the number of offshore wind turbines in UK waters has grown from two to c.2,900 – enough to power 54 per cent of UK homes.

This section provides an overview of UK offshore wind operational and committed projects and key statistics, including share of the global market.

54
Operational and under construction wind farms in the UK

Crew boat and turbines at Rampion Offshore Wind Farm

Fig 1

UK percentage share of global offshore wind operating capacity

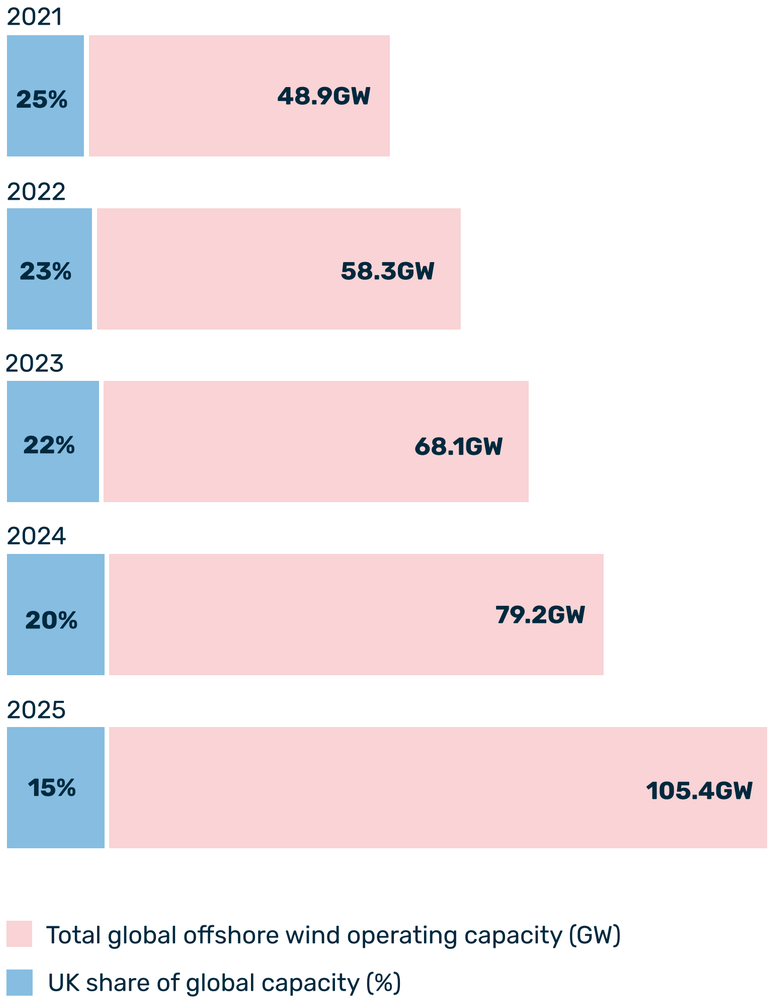


Fig 2

2025 global offshore wind operating capacity by country

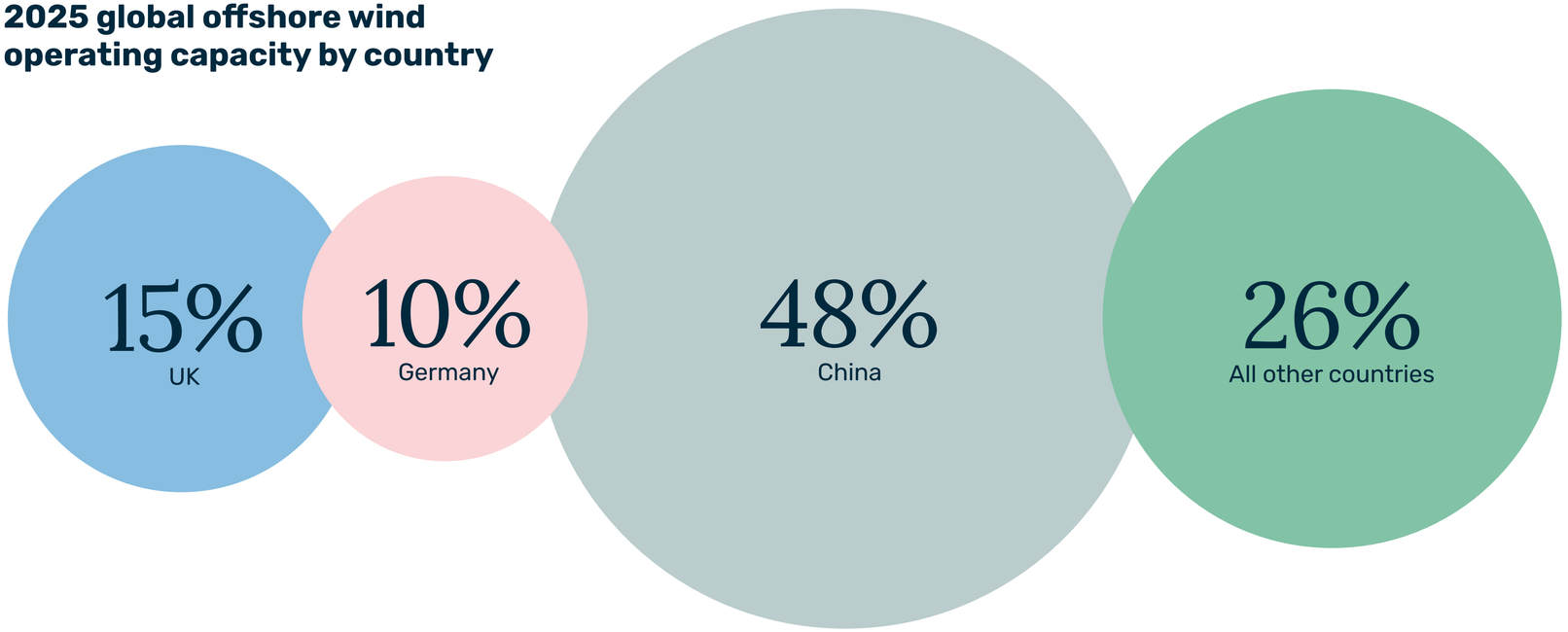


Fig 3

UK offshore wind grid connected capacity (change from previous year)

UK offshore wind grid connected capacity continues to grow and now stands at 16.5GW. The 0.6GW increase on 2024 is due to turbine installation progressing at Dogger Bank A, Neart na Gaoithe and Moray West in Scotland.

Grid connected capacity is the measure of all the offshore wind turbines that were installed and exporting electricity to the grid at the end of December 2025, including sites under construction and partially operational. This number will be slightly higher than the UK operational capacity, which is a sum of capacity of all projects that are fully operational.

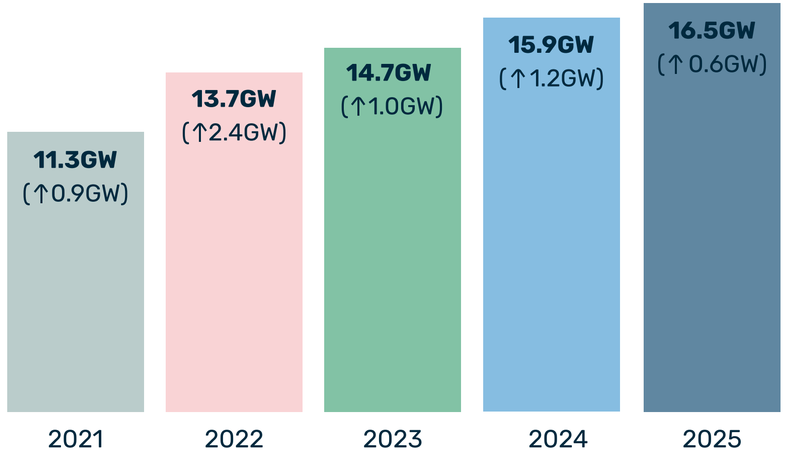
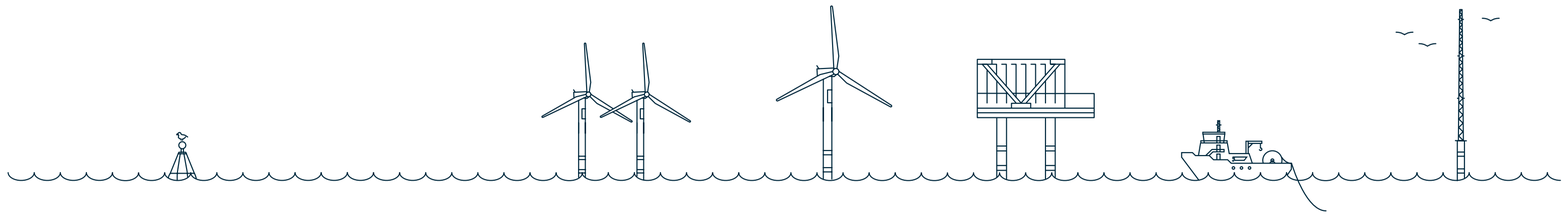


Fig 4

UK offshore wind assets as at 31 December 2025



	GW	Wind farms	Turbines	Substations	Export cables	Met masts
Fully commissioned	15.2	46	2,820	42	92	9
Under construction[1]	11.4	8	801	11	16	0
Total	**26.6**	**54**	**3,621**	**53**	**108**	**9**

1. Projects under construction but not yet fully commissioned

Fig 5

25 years of growth in UK offshore wind grid connected capacity

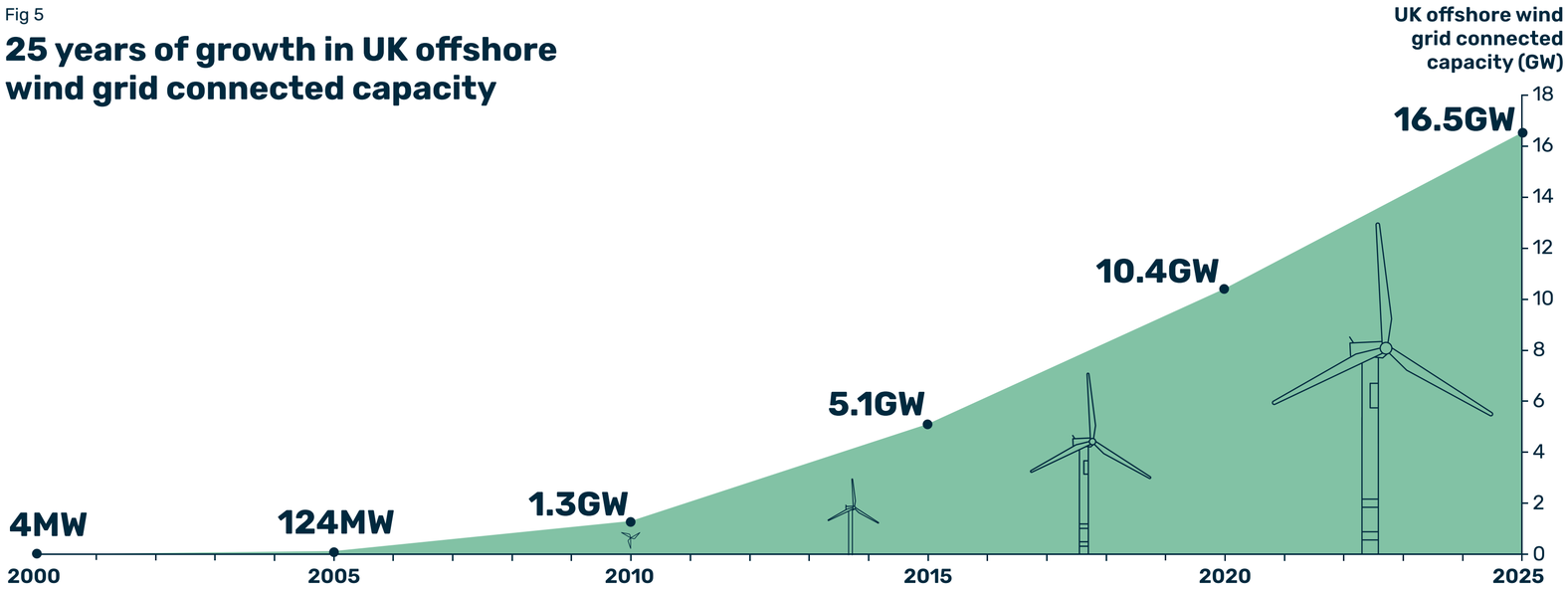


Fig 6

Asset activity in 2025

Wind farms starting offshore construction

Hornsea 3

Inch Cape

Wind farms continuing offshore construction

Dogger Bank A

Dogger Bank B

Dogger Bank C

East Anglia THREE

Moray West

Sofia

Wind farms becoming fully commissioned

Neart na Gaoithe

Photo: courtesy of CHPV Offshore Film & Photography

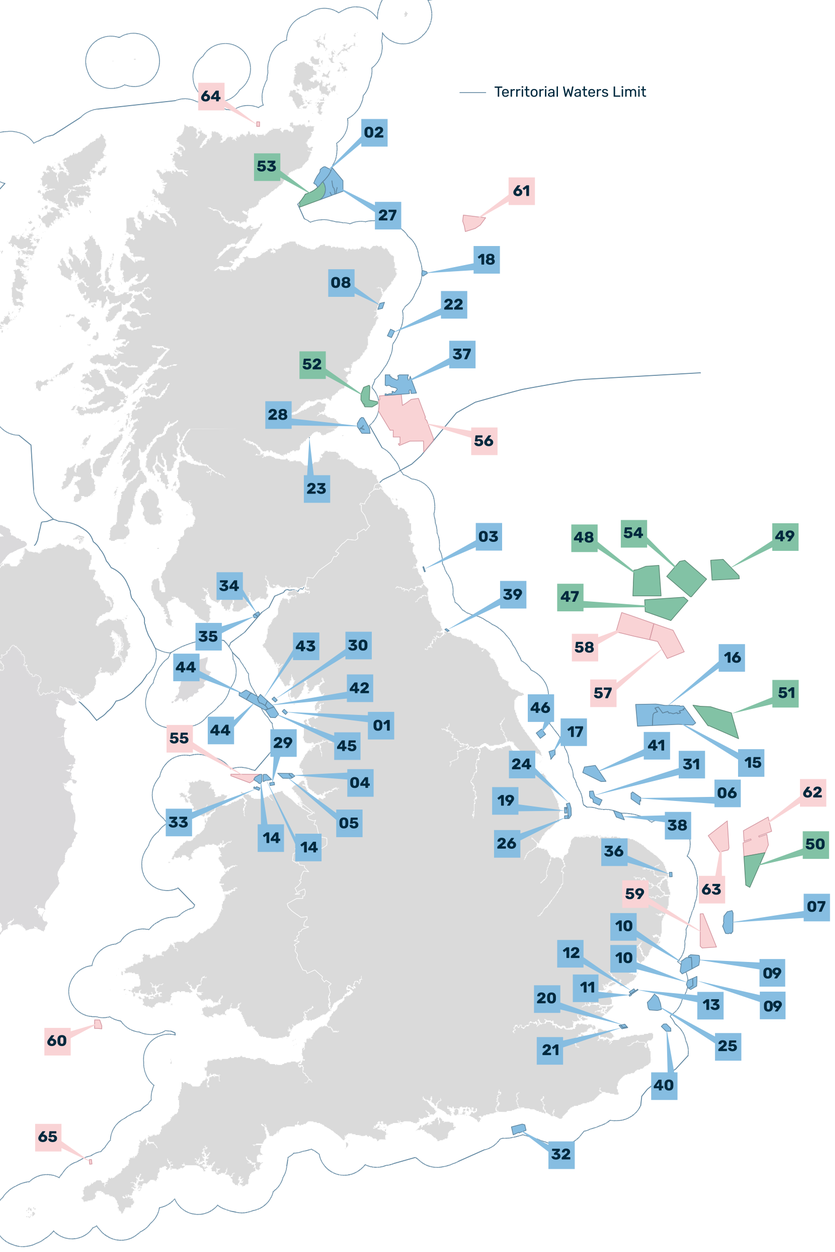


Fig 7

UK offshore wind portfolio as at December 2025

Adjusted to include results of CfD Allocation Round 7

Fully commissioned

Total capacity of wind farms that are fully commissioned

		Capacity MW[1]
01	Barrow	90
02	Beatrice[2]	588
03	Blyth Demonstration Phase 1	42
04	Burbo Bank	90
05	Burbo Bank Extension	259
06	Dudgeon	402
07	East Anglia ONE	714
08	European Offshore Wind Deployment Centre[2]	97
09	Galloper	353
10	Greater Gabbard	504
11	Gunfleet Sands Demonstration	12
12	Gunfleet Sands I	108
13	Gunfleet Sands II	65
14	Gwynt y Môr	576
15	Hornsea 1	1,218
16	Hornsea 2	1,386
17	Humber Gateway	219
18	Hywind Scotland[2]	30
19	Inner Dowsing	97
20	Kentish Flats	90
21	Kentish Flats Extension	50
22	Kincardine[2]	50
23	Levenmouth Demonstration[2]	7
24	Lincs	270
25	London Array	630
26	Lynn	97
27	Moray East[2]	953
28	Neart na Gaoithe[2]	448
29	North Hoyle	60
30	Ormonde	150
31	Race Bank	573
32	Rampion	400
33	Rhyl Flats	90
34	Robin Rigg East[2]	84
35	Robin Rigg West[2]	90
36	Scroby Sands	60
37	Seagreen Phase 1[2]	1,075
38	Sheringham Shoal	317
39	Teesside	62
40	Thanet	300
41	Triton Knoll	857
42	Walney 1	184
43	Walney 2	184
44	Walney Extension	659
45	West of Duddon Sands	389
46	Westermost Rough	210
Total		**15,189**

Under construction

Total capacity of wind farms that have commenced offshore construction but are not yet fully commissioned

		Up to capacity MW[1]
47	Dogger Bank A	1,235
48	Dogger Bank B	1,235
49	Dogger Bank C	1,200
50	East Anglia THREE	1,397
51	Hornsea 3	2,955
52	Inch Cape[2]	1,080
53	Moray West[2]	882
54	Sofia	1,400
Total		**11,384**

Supported

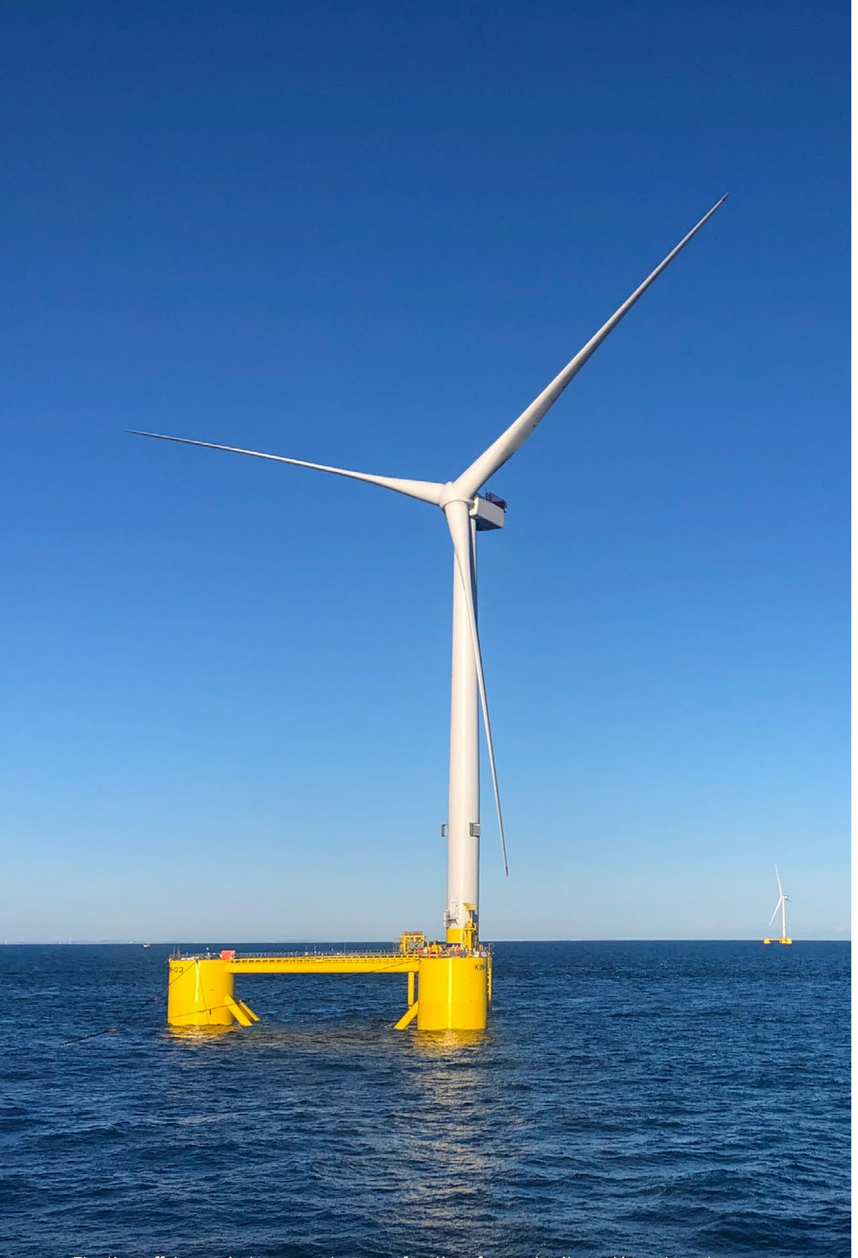
Total capacity of wind farms that have a Contract for Difference on offer[3]

		Up to capacity MW[1]
55	Awel y Môr	576
56	Berwick Bank[2]	4,100
57	Dogger Bank South (East)[4]	1,500
58	Dogger Bank South (West)[4]	1,500
59	East Anglia TWO	980
60	Erebus	100
61	Green Volt[2]	560
62	Norfolk Vanguard East	1,400
63	Norfolk Vanguard West	1,400
64	Pentland[2]	100
65	Wave Hub	30
Total		**12,246**

For an overview of UK offshore wind development pipeline capacity, including future potential and policy ambition, see **pp. 20-23**.

To find out where current development sites are, please see **p.23**.

1. Lease or Agreement for Lease maximum capacity, rounded to the nearest whole MW
2. Asset managed by Crown Estate Scotland
3. Projects successful in AR7 in January 2026 are included in the Supported category, since this was such a material milestone for the sector. CfD capacity may be different to the project capacity
4. Subject to Dogger Bank South Development Consent Order



Floating offshore wind represents a new frontier of opportunity and investment
Photo: courtesy of Principle Power

A landmark year for UK floating offshore wind

2025 was a landmark year for the establishment of new Floating Offshore Wind (FLOW) technology in the UK, with the successful award of rights for three commercial-scale projects in the Celtic Sea.

The awards to some of the world's leading developers marked the conclusion of Offshore Wind Leasing Round 5 – an opportunity for up to 4.5GW of new floating wind capacity across three sites off the coasts of Wales and South West England.

Following the conclusion of the tender process in the summer of 2025 it was announced that Gwynt Glas (a 50:50 consortium between EDF Power Solutions and ESB) and Equinor had been successful in their bids for two sites, with The Crown Estate committing to secure a developer for the third site. In November 2025 it was announced that Ocean Winds had been successful in a Direct Award process and would take forward the third site; the Agreement for Lease was subsequently signed in February 2026.

The successful award of all three sites represents a major vote of confidence in the UK's offshore wind industry, and in FLOW as a technology, at a time of increasing pressures across international energy markets. The new turbines could be operational by the mid 2030s.

The news marks an important step towards realising significant opportunities for communities around the Celtic Sea and beyond, with Round 5 projected to support the creation of more than 5,000 jobs and lead to a £1.4 billion boost to the UK economy.

As part of the tender process for Round 5, bidders were required to set out plans for creating new onshore benefits from the development of their wind farms. This included committing to ensuring that at least 3.5 per cent of the project workforce consists of apprenticeships, and that a minimum of 10 per cent of project employees aged 19-24 are not currently in education, employment or training.

Establishing a new supply chain will be key to the success of a new floating wind industry in the Celtic Sea, as well as ensuring the UK maintains its position at the forefront of this emerging technology. The Crown Estate is continuing to work with the developers on their plans to support this, while also planning to invest £400 million of its own capital into the UK offshore wind supply chain through its Supply Chain Accelerator and wider investment programmes. Further details are available on **p. 38**.

Alongside the success of the Round 5 process, consent was awarded to Salamander Offshore Wind Farm in Scotland in July and to White Cross Wind Farm, off the Devon coast, in August. In early 2026 CfDs were awarded to the Erebus Test and Demonstration Floating Wind Project off the Welsh coast, and Pentland Floating Offshore Wind Farm off the North Coast of Scotland. These milestones represent an important step in the journey towards realising the full potential of floating wind in the UK.

25 years of powering value for the nation

In just 25 years the UK has turned the kernel of an idea into the second largest offshore wind market in the world, capable of powering 15.5 million homes and driving energy security, economic opportunity and climate resilience. This remarkable story is the product of foresight and a pioneering spirit backed by innovation, long-term investment, stable policy, world-class data and evidence, and extraordinary collaboration (read more on **pp. 4-5**).

It's a compelling story of working together to achieve a common goal, and overcoming the many challenges presented along the way. These challenges include: testing new technology; building a market and attracting investment; creating a stable policy environment; managing an increasingly busy sea space in a way which allows offshore wind, nature, habitats and other sectors to thrive; building a supply chain; helping establish new floating technology; and managing economic volatility. As we look back at how these challenges have been addressed we see the offshore wind sector's enduring ability to adapt and thrive, and the collective power of long-term vision, collaboration and innovation.

Supporting energy security and resilience

This powerhouse of a sector now plays a vital role in tackling many of today's challenges including the increasing need for energy security and resilience. The UK still imports around 42 per cent of its energy,[1] leaving households and businesses exposed to global gas price shocks driven by geopolitics, supply disruption and extreme weather. Reducing reliance on imported fossil fuels is one of the most effective ways to protect families from future price spikes and strengthen national resilience. Third party analysis has shown that wholesale electricity prices could have been about 46 per cent higher in 2025 without wind farms (offshore and onshore) limiting the role of gas power plants in setting prices.[2] In addition, between 2010 and 2023, UK consumers are estimated to have saved around £104 billion[3] as wind generation helped shield families from fluctuating global gas prices.

As we look to the future, sustained investment in UK offshore wind – which is now cheaper to build and operate than new gas[4] – will continue to deliver benefits to the consumer, bolstering the UK's independence from imported energy, and reducing energy price sensitivity to drastic market fluctuations caused by an increasingly volatile global market.

Driving jobs and economic growth for the long-term

UK offshore wind is providing regeneration and renewal for coastal communities and new job opportunities; 40,000 people are now employed in the UK by the offshore wind industry, and this could rise to 94,000 by 2030.[5] The c.2,000 companies and factories which are part of the wind energy supply chain are generating skilled jobs across the country and are estimated to contribute £18.2 billion to the UK economy over the next 10 years.[6]

The UK's world-class expertise is attracting global investment at home, and the early-mover advantage is opening up new opportunities for UK plc to export high-quality products, services and know-how into new offshore wind markets around the world. Examples of this include SeAH Wind's £590 million investment in Teesside which will create up to 750 jobs by 2027[7] and the £266 million expansion of Siemens Gamesa's blade manufacturing facility creating over 1,340 jobs.[8]

Rampion Offshore Wind Farm

1. Offshore Energies UK (OEUK): 2025 Economic Report (p. 16)
2. Energy & Climate Intelligence Unit: Wind farms cut power prices by almost a third in 2025, January 2026
3. UCL: Modelling the long-term financial benefits of UK investment in wind energy generation, October 2025
4. Department for Energy Security and Net Zero: Record breaking auction for offshore wind secured to take back control of Britain's energy, January 2026
5. RenewableUK: Wind industry skills intelligence report 2025
6. RenewableUK: UK marks historic milestone of 25 years of offshore wind, December 2025
7. UK Government: UK government seals further £225 million investment in Teesside renewables industry with financing deal, October 2024
8. UK Government: Wind of change for the Humber region, August 2021

Supporting a climate-resilient future

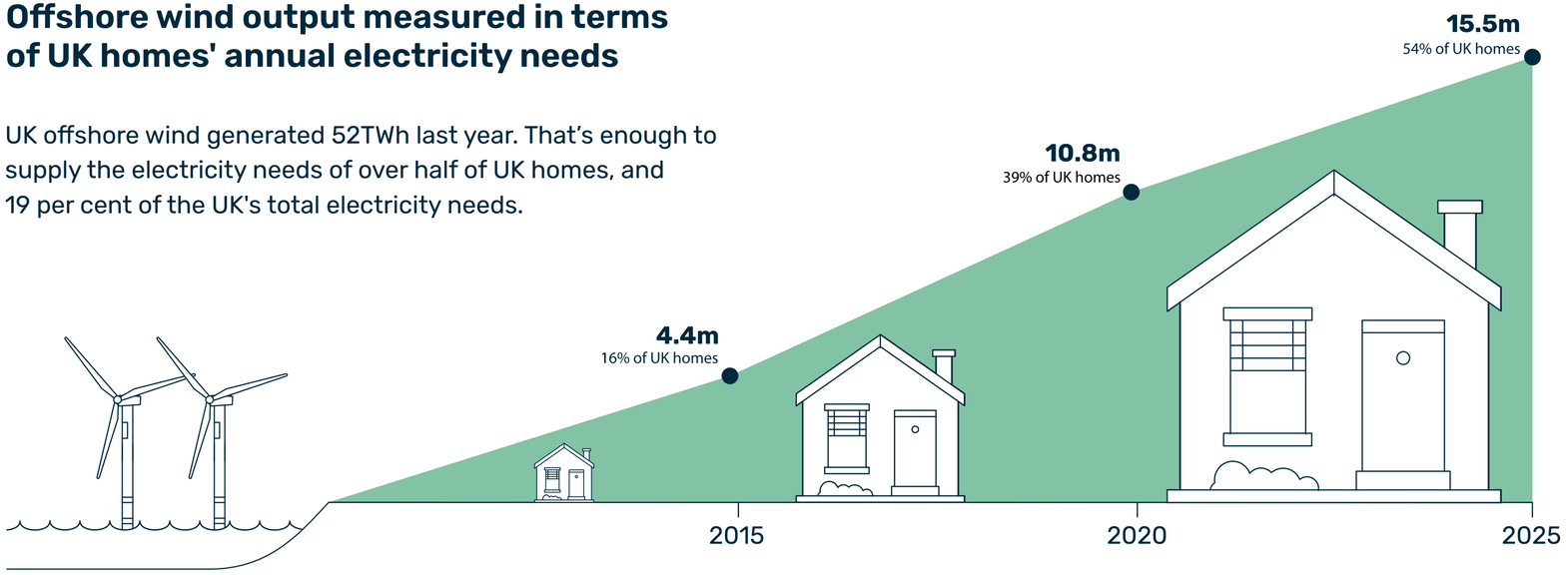
Analysis by The Crown Estate also shows that the offshore wind sector displaced 20.8 million tonnes of CO_2 in 2025,[1] helping to mitigate the risks of climate change. If not mitigated, these risks could lead to a reduction in UK GDP and significant increases in government borrowing, due to lower productivity and climate-related damage such as heatwaves, flooding, the loss of crops and animals, and damage to critical infrastructure.[2,3] Offshore wind is therefore playing a vital role in protecting our economy and our way of life.

The last 25 years have taught us that offshore wind has a number of roles to play in our national life. Each one is a reminder of the impact that can be delivered through collective ambition, and as motivation to grow the sector over decades to come, amplifying the extraordinary benefits it can offer and contributing to a more prosperous future for all.

Fig 8

Offshore wind output measured in terms of UK homes' annual electricity needs

UK offshore wind generated 52TWh last year. That's enough to supply the electricity needs of over half of UK homes, and 19 per cent of the UK's total electricity needs.



1. See p. 39 for CO_2 displacement calculations
2. Office For Budget Responsibility: Fiscal Risks And Sustainability (Chapter 4.11), July 2025
3. The Climate Change Committee: The Seventh Carbon Budget (Chapter 1.2.1.), February 2025
4. RenewableUK: UK Marks Historic Milestone Of 25 Years Of Offshore Wind, December 2025
5. RenewableUK: Wind industry skills intelligence report 2025
6. Energy & Climate Intelligence Unit: Wind farms cut power prices by almost a third in 2025, January 2026
7. RenewableUK: Map of the UK's wind energy supply chain and areas of industrial growth, June 2025

£18.2 billion

Estimated contribution to UK economy over the next 10 years by supply chain companies[4]

94,000

Number of jobs the offshore wind industry could support by 2030[5]

31%

Wind farms cut power prices by almost a third in 2025[6]

c.2,000

Companies and factories are part of the UK wind energy supply chain[4]

60 million

Tonnes of CO_2 prevented from going into the atmosphere over the last 25 years[1]

70

Parliamentary constituencies with companies in the offshore wind supply chain[7]

Offshore wind farm performance and ownership

Despite a challenging economic climate, 2025 was another record-setting year for the UK offshore wind farm portfolio, generating more clean energy for the nation than ever before and helping the UK reduce its reliance on fossil fuels and energy imports.

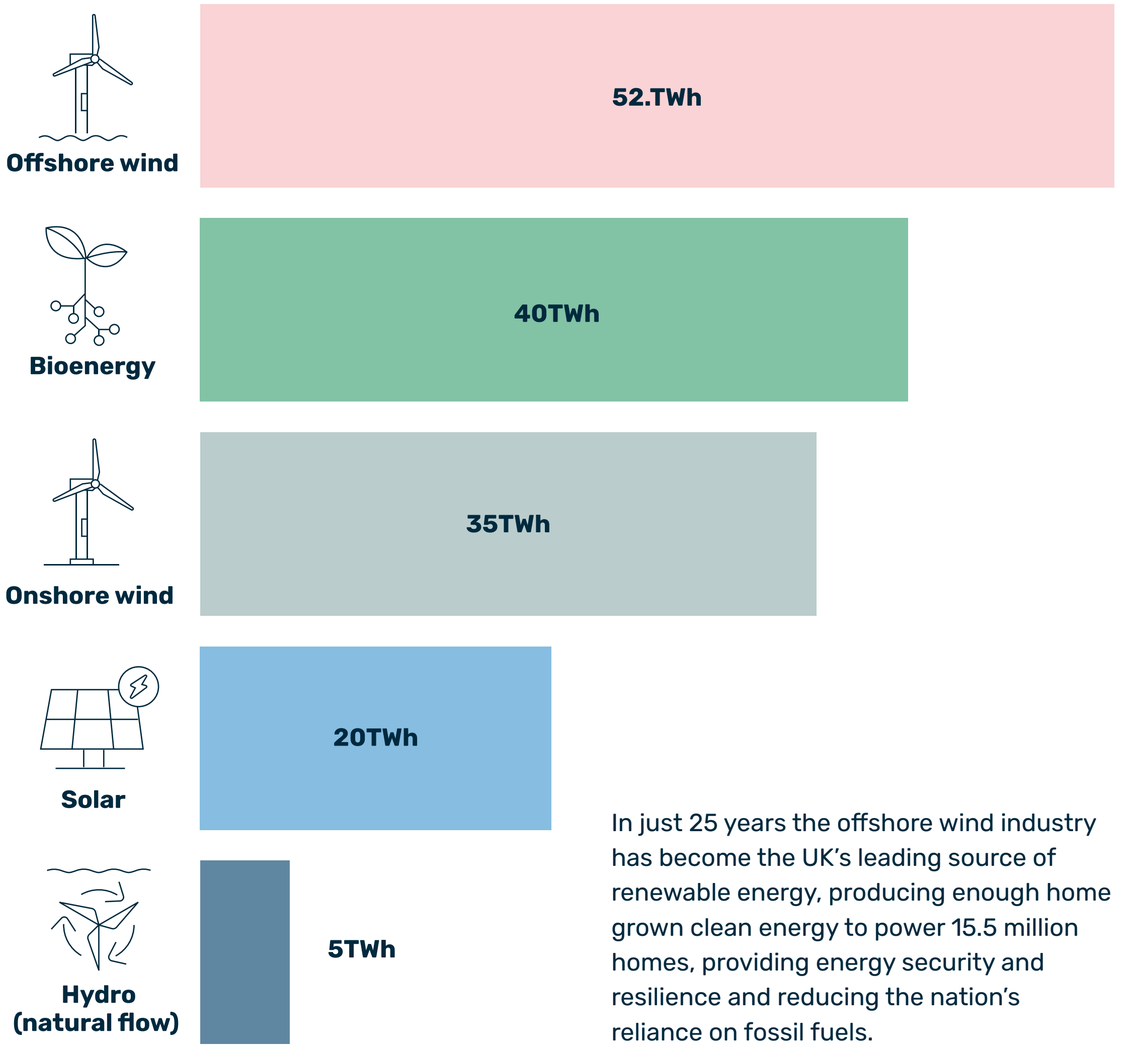
This section summarises how the portfolio performed in 2025, how it compares to other electricity sources, and ownership of offshore wind farms.

52TWh
Of clean energy produced in 2025, enough to power 15.5 million homes

Wind turbines at London Array Wind Farm

Fig 9

2025 UK renewable energy generated by fuel type[1]



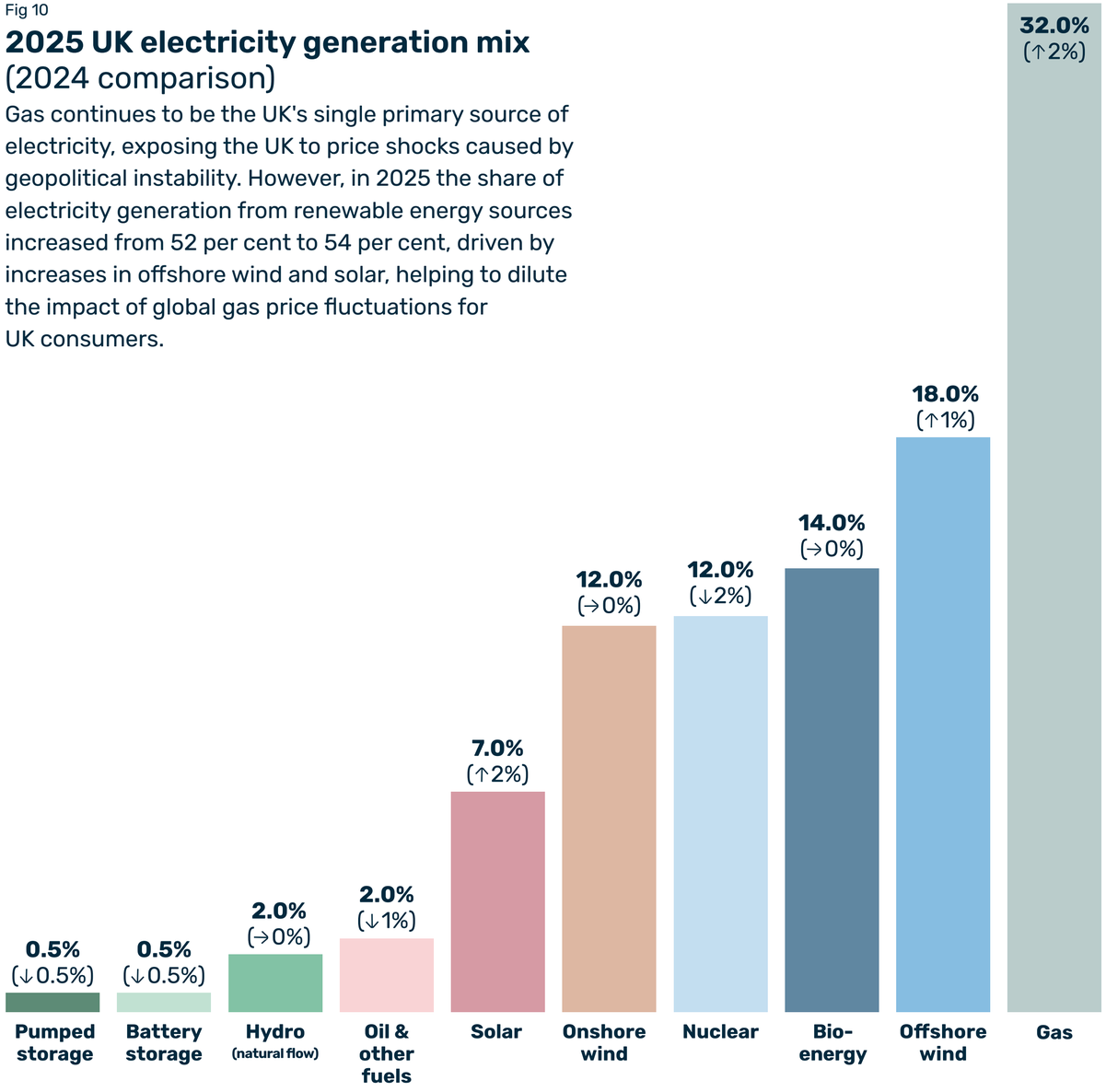
In just 25 years the offshore wind industry has become the UK's leading source of renewable energy, producing enough home grown clean energy to power 15.5 million homes, providing energy security and resilience and reducing the nation's reliance on fossil fuels.

1. Data source: Department for Energy Security and Net Zero (DESNZ) Energy Trends. Capacities are rounded to the nearest terawatt hour

Fig 10

2025 UK electricity generation mix (2024 comparison)

Gas continues to be the UK's single primary source of electricity, exposing the UK to price shocks caused by geopolitical instability. However, in 2025 the share of electricity generation from renewable energy sources increased from 52 per cent to 54 per cent, driven by increases in offshore wind and solar, helping to dilute the impact of global gas price fluctuations for UK consumers.



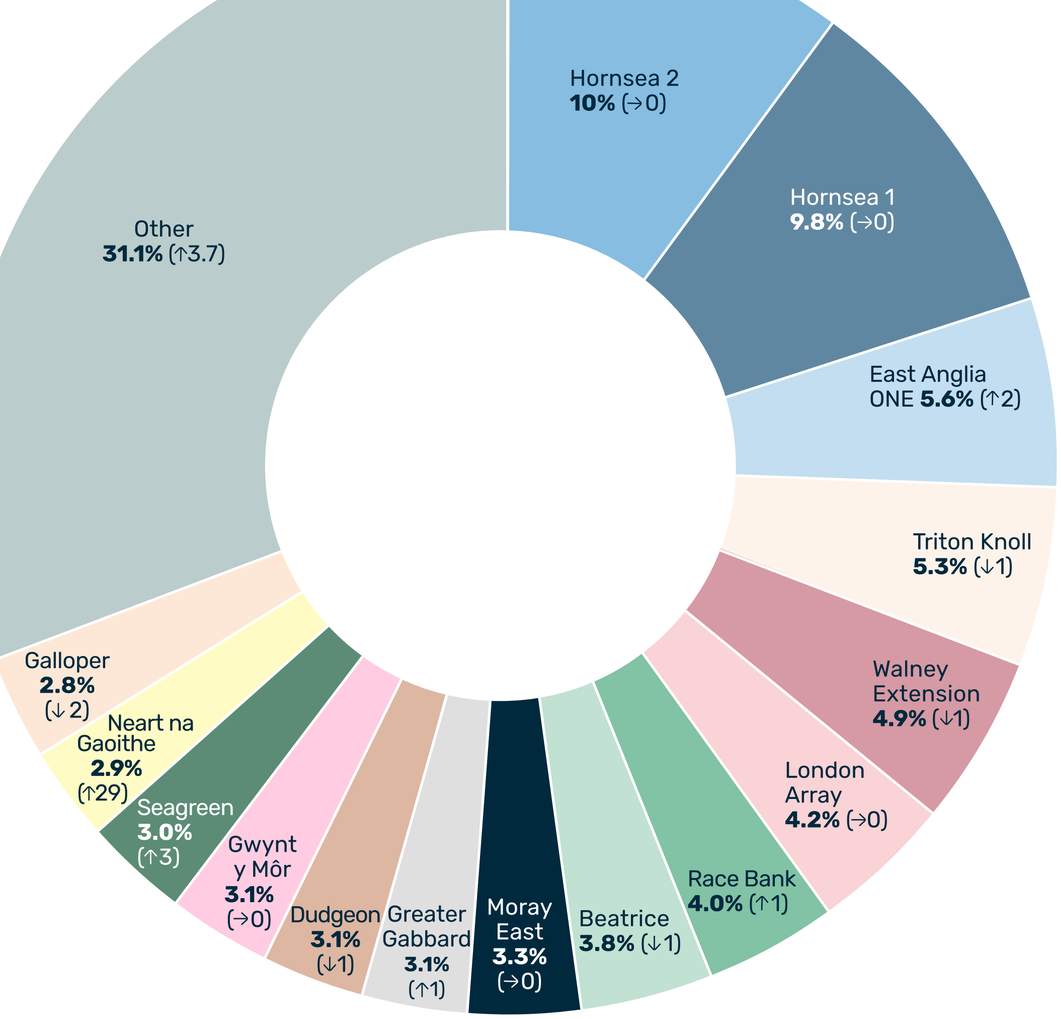


Fig 11

Offshore wind generation by wind farm

As a percentage of total offshore wind generation in 2025 (position change from 2024)

Total power generated in 2025 was 52TWh, up from 49.2TWh in 2024, with Neart Na Gaoithe becoming one of the top generators as a result of becoming fully operational.

Overall fleet performance in 2025 was 97.7 per cent, up from 94.4 per cent in 2024.

Fig 12

UK monthly wind speed

Variability in wind speed can considerably impact offshore wind generation. Overall in 2025 the UK experienced slightly lower wind speeds than the long-term average (-1.7 per cent).

Compared to long-term monthly averages, January to May saw lower wind speeds than normal but these were almost fully balanced out by average or above average wind speeds through the remainder of the year.

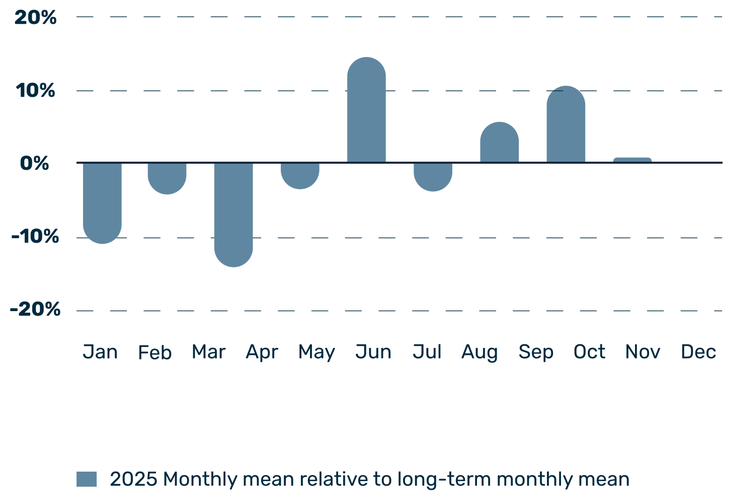
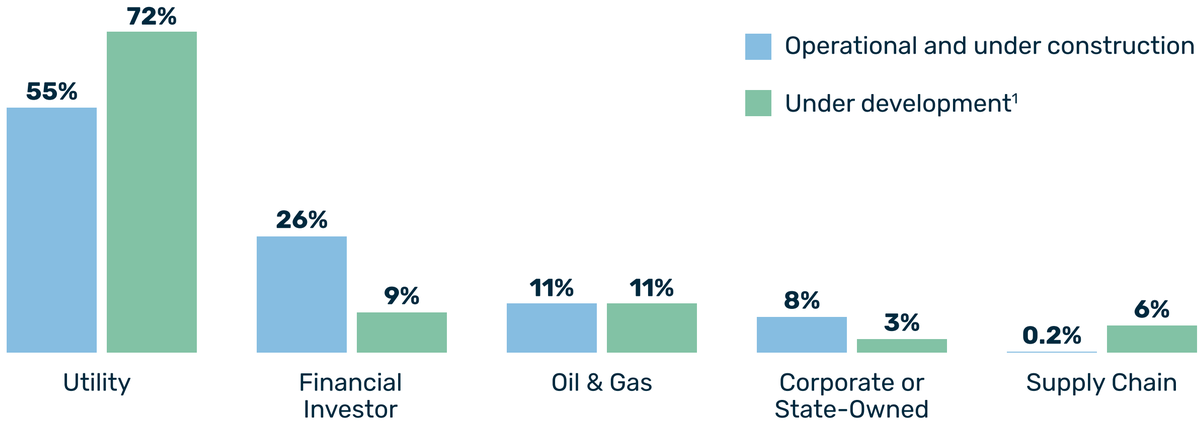


Fig 13

Capacity ownership by category and lifecycle stage in 2025



1. Projects with government support on offer, consented, in planning or pre-planning

Fig 14

Operational and under construction wind farm ownership

As a percentage of total capacity in 2025 (position change from 2024)

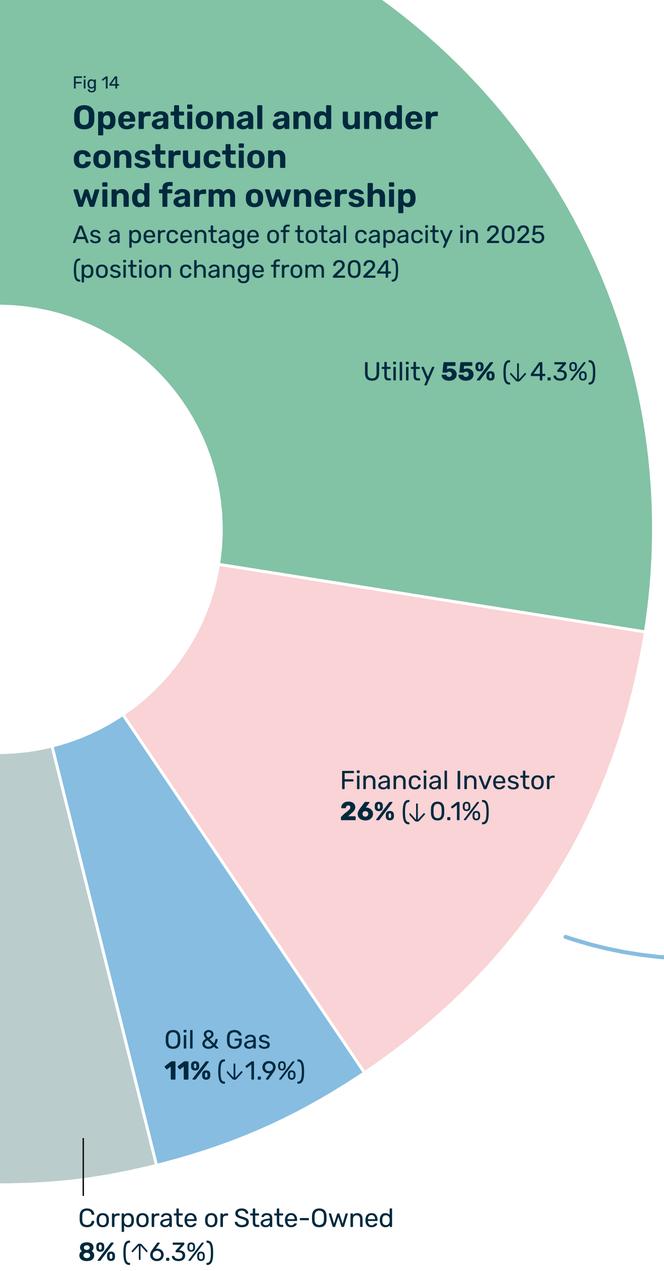
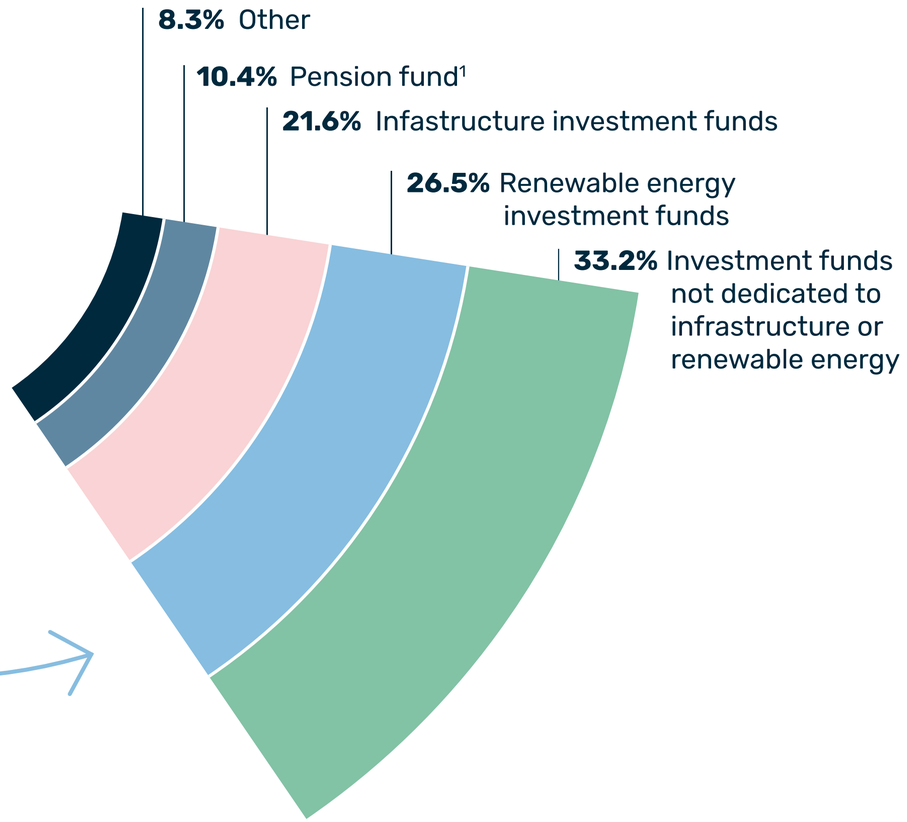


Fig 15

Breakdown of financial investor by type



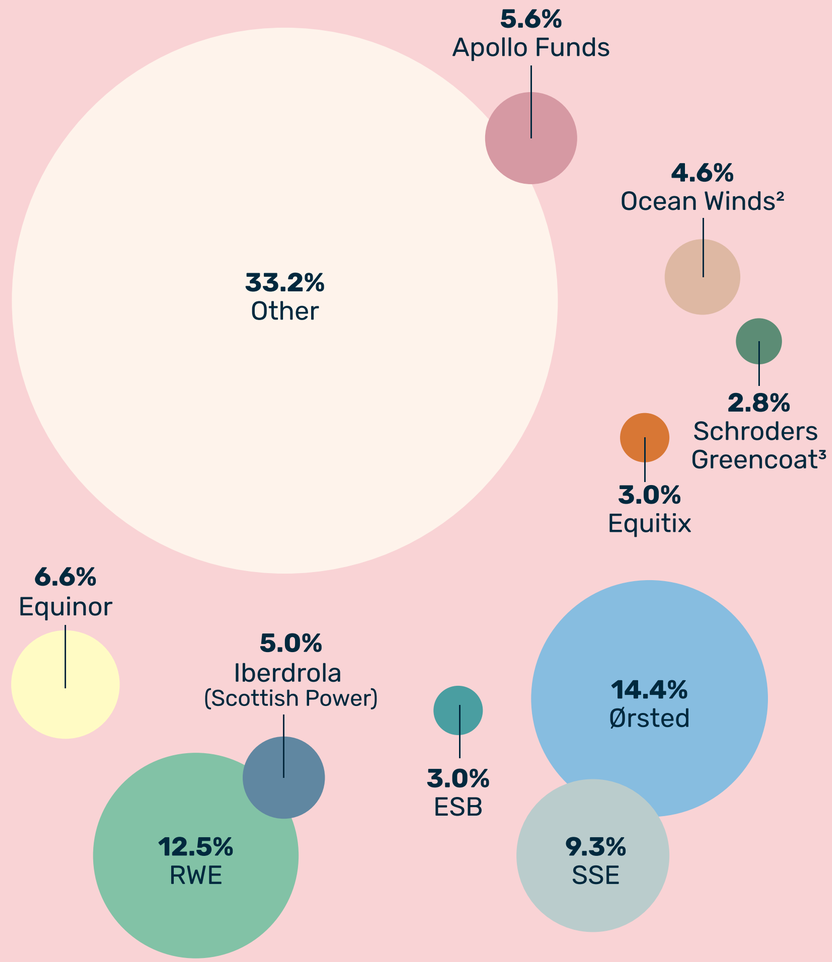
A full breakdown of offshore wind farm ownership for operating and under construction sites can be found on here: **Wind Farm Ownership | The Crown Estate**

1. Pensions also invest through other funds

Fig 16

Operational and under construction wind farm ownership by company

As a percentage of total capacity in 2025



2. Joint venture between EDP Renewables and ENGIE
3. Greencoat UK Wind and other Schroders Greencoat Funds

OFTO performance and ownership

Offshore Transmission Owners (OFTOs) are responsible for owning, operating and maintaining the subsea cables, offshore platforms, and onshore substations which connect offshore wind farms to the onshore national grid.

The OFTO network is a critical component of the offshore wind energy system, and in this section we look at OFTO ownership and performance in 2025.

39

OFTO offshore substations deliver electricity from offshore wind farms to the grid

Rampion Offshore Wind substation

Overview

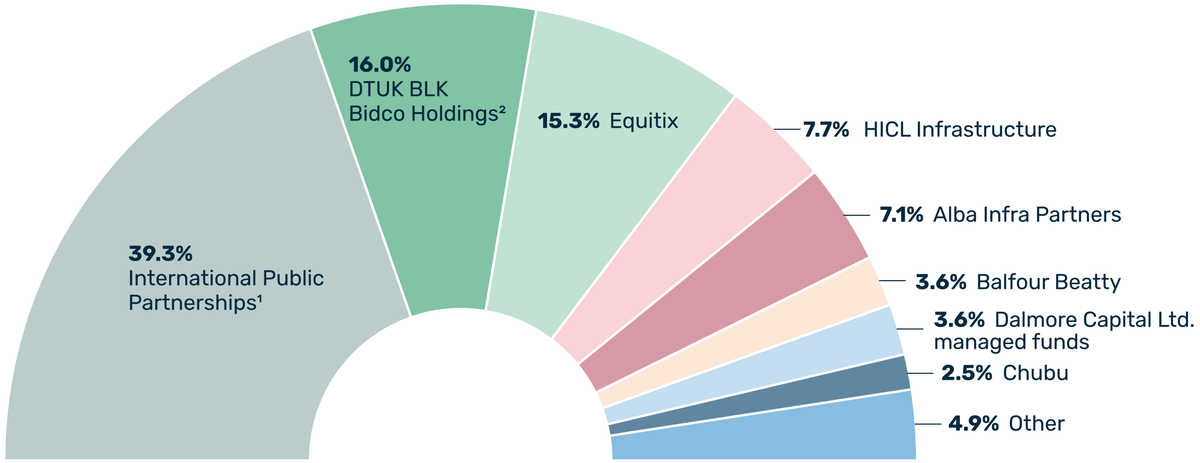
The OFTO network comprises 3,991 kilometres of export cable circuits, connecting to 41 UK offshore substations (39 of which are owned by OFTOs), and supporting over 13.8GW of grid capacity.

The network continues to grow to support the acceleration of offshore wind farm development. In early 2025 an OFTO licence was awarded to Seagreen Phase 1 and two new OFTO tender rounds were launched by Ofgem (for Sofia, Inch Cape, East Anglia THREE and Dogger Bank C).

OFTO ownership details can be found here:
OFTO Ownership | The Crown Estate

Fig 17

UK OFTO ownership in 2025 by company



1. OFTOs operated by Transmission Capital Partners
2. OFTOs operated by DTUK

Fig 18

Average OFTO availability

Average OFTO availability increased to 98.2 per cent in 2024-25, returning performance to above the minimum level target of 98 per cent, after a slight dip in 2023-24. This was supported by eleven OFTOs maintaining 100 per cent availability, and a further nine achieving over 99 per cent availability, during the year.

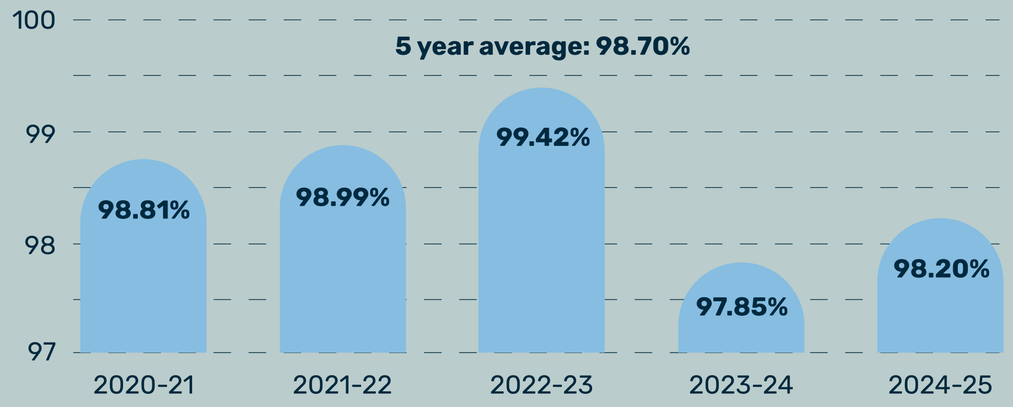
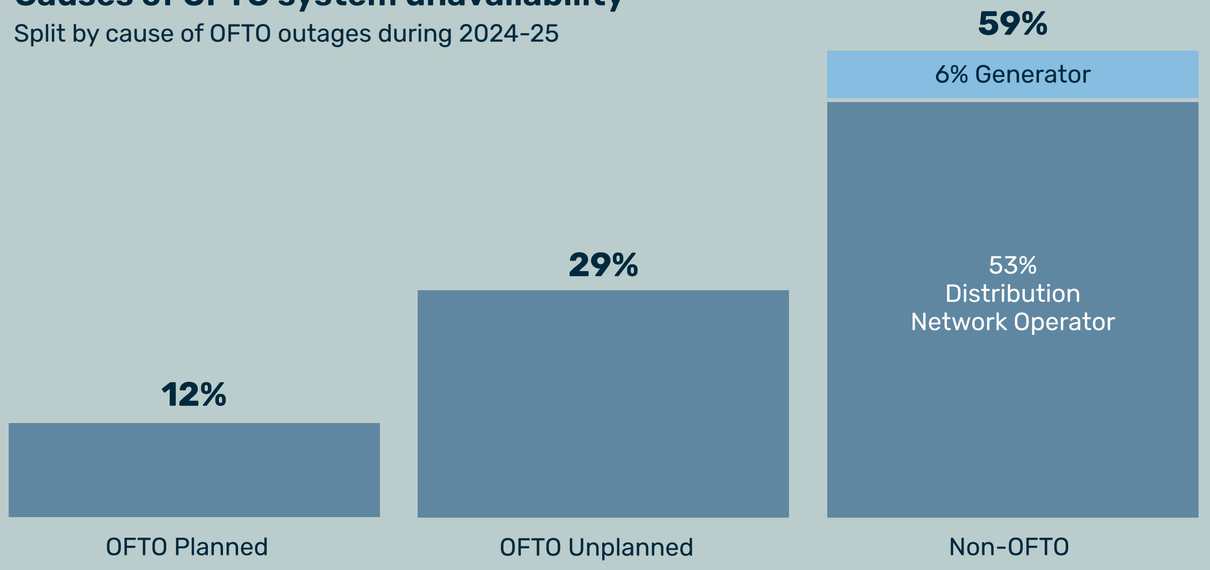


Fig 19

Causes of OFTO system unavailability

Split by cause of OFTO outages during 2024-25



Offshore wind development pipeline

A healthy pipeline of future offshore wind potential is vital for the UK to achieve its mission for clean power by 2030 and net zero by 2050.

In this section we provide an overview of where potential future capacity is expected to come from, including projects currently in development and potential capacity from future leasing rounds.

8.4GW

Secured in CfD Allocation Round 7, the biggest procurement of offshore wind energy in European history

Wind turbine components being loaded ready for deployment
Photo: courtesy of Chris Henderson Photography

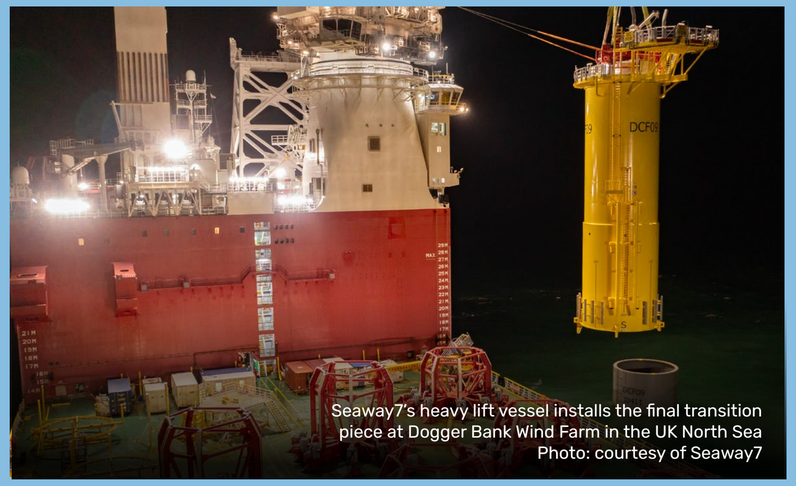
Overview

A number of significant announcements during the year saw several projects moving through the pipeline and closer towards realising their potential.

Contracts for Difference (CfD) were awarded to eight projects in Allocation Round 7 (AR7), which concluded in January 2026: Berwick Bank in Scotland, Awel y Môr, Dogger Bank South East and West, Norfolk Vanguard East and West, and two floating wind projects, Pentland in Scotland and Erebus in the Celtic Sea. A record 8.4GW of capacity was secured, making it Europe's biggest ever offshore wind auction and significantly increasing the capacity of 'supported' projects. This outcome has been included in the statistics in this section.

During the year, generation assets with capacity totalling more than 11GW were awarded planning consent. In England and Wales this included Five Estuaries, Morecambe, Morgan, Mona, Rampion 2 and floating wind project White Cross. See **pp. 24-26** for an update on projects in Scotland including Berwick Bank, West of Orkney and Salamander.

In 2025, over 4.7GW progressed from 'identified potential' capacity with the award of seabed rights, including Dogger Bank D and two commercial-scale floating wind projects in the Celtic Sea.[1] The Crown Estate progressed plans for bringing a further 20-30GW of seabed rights to market by 2030 and in 2026 announced proposals for Leasing Round 6 (see **p. 35**).



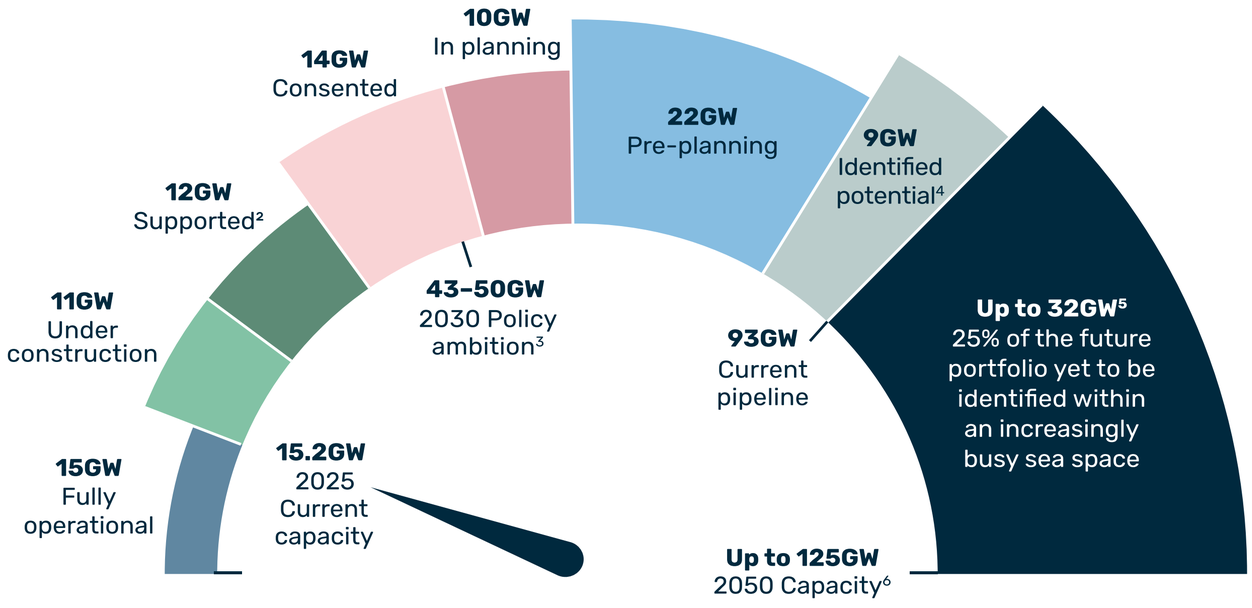
Seaway7's heavy lift vessel installs the final transition piece at Dogger Bank Wind Farm in the UK North Sea
Photo: courtesy of Seaway7

Fig 20

UK offshore wind development pipeline capacity

This figure shows how projects at different stages of development make up the pipeline of offshore wind potential to meet the UK's future requirements.

The maps on **p. 10** and **p. 23** list projects in each stage of the pipeline, including identified potential capacity from current leasing rounds and additional capacity requests (subject to the grant of property rights).



1. The third PDA in the Celtic Sea entered into Afl in Feb 2026
2. Projects that have Government support on offer, including projects successful in CfD Allocation Round 7
3. UK Government: Clean Power 2030 Action Plan (2024)
4. Projects, leasing rounds and additional capacity subject to the grant of property rights
5. Offshore Wind Leasing Round 6, due to be launched in 2027, is included in this 32GW
6. 'Balanced Pathway' recommendation: The Seventh Carbon Budget (2025)

Staging vessel at Humber Gateway

Fig 21

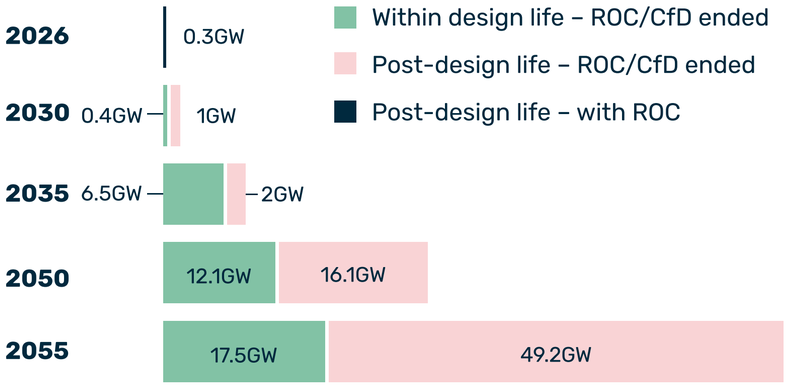
Consented and leased capacity expected to be post-design life/subsidy 2025-2050

Maintaining and growing a healthy offshore wind pipeline that supports 2050 targets will require a combination of new offshore wind developments, and repowering and extending the lifespan of existing offshore wind farms.

Figure 21 illustrates the offshore wind capacity at risk of falling away in the coming years, either because turbines reach the end of their expected design life (earlier turbine lifespans are approximately 20-25 years) or because government subsidies – in the form of Renewable Obligation Certificates (ROC) or the more recent Contracts for Difference (CfD) – expire.

Action to address this is making progress; the capacity expected to be post-CfD in 2050 has drastically reduced thanks to CfDs in Allocation Round 7 being awarded for 20 years instead of 15 years, extending capacity coming online in the early 2030s past 2050.

This provides greater stability of capacity into the 2050s, enabling the sector and stakeholders to focus on the vital work to address the challenges of near-term post-design life capacity.



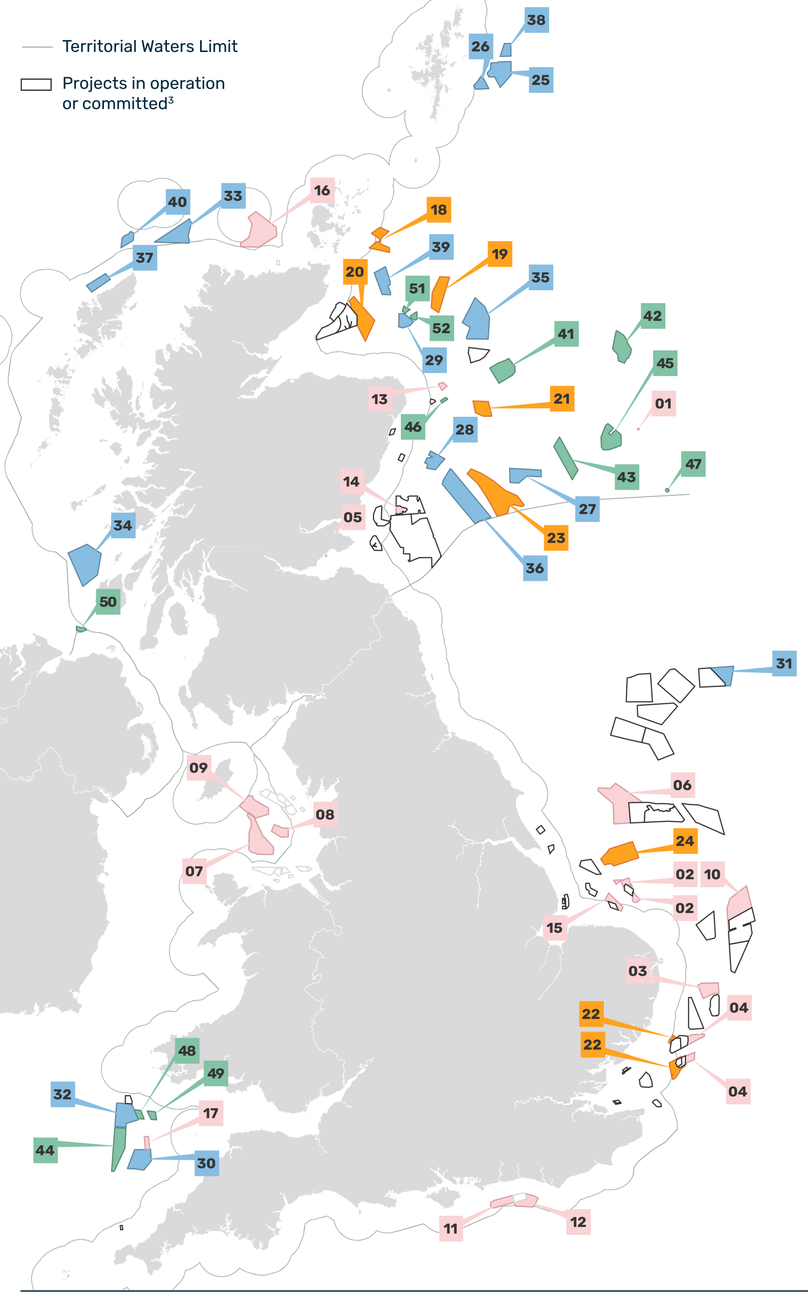


Fig 22

UK offshore wind development pipeline as at 31 December 2025

Adjusted for results of CfD Allocation Round 7

Consented

Wind farms that have received consent but not yet secured a Contract for Difference

		Up to capacity MW[1]
01	Culzean[TOG, 2]	3
02	Dudgeon Extension[Ext]	402
03	East Anglia ONE North[R3]	950
04	Five Estuaries[Ext]	353
05	Forthwind[T&D, 2]	20
06	Hornsea 4[R3]	2,700
07	Mona[R4]	1,500
08	Morecambe[R4, 4]	480
09	Morgan[R4, 5]	1,500
10	Norfolk Boreas[R3]	1,400
11	Rampion 2 (Rampion Extension)[Ext]	400
12	Rampion 2 (Zone 6)[R3]	800
13	Salamander[IN, 2]	100
14	Seagreen Phase 1a[R3,2]	500
15	Sheringham Shoal Extension[Ext]	317
16	West of Orkney[SW, 2]	2,000
17	White Cross[T&D]	100
Total		**13,525**

In planning

Wind farms for which a consent application has been submitted

		Up to capacity MW[1]
18	Ayre[SW, 2]	1,008
19	Buchan[SW, 2]	960
20	Caledonia[SW, 2]	2,000
21	Muir Mhòr[SW, 2]	798
22	North Falls[Ext]	504
23	Ossian[SW, 2]	3,528
24	Outer Dowsing[R4]	1,500
Total		**10,298**

Pre-planning

Wind farms for which a consent application has not yet been submitted

		Up to capacity MW[1]
25	Arven[SW, 2]	1,800
26	Arven South[SW, 2]	500
27	Bellrock[SW, 2]	1,200
28	Bowdun[SW, 2]	1,008
29	Broadshore[SW, 2]	500
30	Celtic Sea PDA 3[R5]	1,500
31	Dogger Bank D[R3]	1,500
32	Gwynt Glas PDA 1[R5]	1,500
33	Havbredey[SW, 2]	1,500
34	MachairWind[SW, 2]	2,000
35	MarramWind[SW, 2]	3,000
36	Morven[SW, 2]	2,907
37	Spiorad na Mara[SW, 2]	840
38	Stoura[SW, 2]	500
39	Stromar[SW, 2]	1,000
40	Talisk[SW, 2]	495
Total		**21,750**

Identified potential

Projects, leasing rounds and additional capacity subject to the grant of property rights

		Up to capacity MW[1]
41	Aspen[TOG, 2]	1,008
42	Beech[TOG, 2]	1,008
43	Cedar[TOG, 2]	1,008
44	Celtic Sea PDA 2[R5]	1,500
45	Cenos[TOG, 2]	1,350
46	Flora[IN, 2]	50
47	Judy[TOG, 2]	15
48	Llŷr 1[T&D]	100
49	Llŷr 2[T&D]	100
50	Malin Sea Wind[IN, 2]	100
51	Scaraben[IN, 2]	99
52	Sinclair[IN, 2]	99
	Additional capacity requests[Ext/R3]	2,500
Total		**8,937**

For UK offshore wind projects in operation or committed,[3] including projects successful in CfD Allocation Round 7, see **p. 10**.

1. Project or Leasing Round capacity, rounded to the nearest whole MW
2. Managed by Crown Estate Scotland
3. Under construction or government support on offer
4. Subject to Development Consent Order for Transmission Assets
5. Morgan Agreement for Lease was surrendered in January 2026

Ext 2017 Extensions Round project
IN Innovation project, INTOG Leasing Round
R3 Leasing Round 3 project
R4 Leasing Round 4 project
R5 Floating Offshore Wind Leasing Round 5 project
SW ScotWind project
T&D Test & Demonstration scale wind project
TOG Targeted Oil & Gas project, INTOG Leasing Round

Crown Estate Scotland
Oighreachd a' Chrùin Alba

Scottish offshore wind

The offshore wind pipeline in Scotland now stands at 43GW, with operational capacity increasing to almost 3.4GW in 2025. In this section, Crown Estate Scotland provides an overview of developments in Scottish offshore wind during the year, including key transactions and activity to support the sustainable growth of the sector.

43GW
Pipeline of capacity in Scottish waters[1]

Neart na Gaoithe wind farm
Photo: courtesy of NnG

1. From identified potential to operational wind farms

Installation of Inch Cape's offshore substation platform in August 2025
Photo: courtesy of Inch Cape

Overview

Crown Estate Scotland plays a central role in the development of offshore wind in Scotland, primarily by awarding and managing seabed agreements and associated rights. It currently has 26 option agreements for offshore wind farms in Scottish waters.

Offshore consents

Scottish projects made good progress in their development during 2025. Ayre and Buchan submitted their offshore consent applications, while Caledonia, Ossian and Muir Mhòr still await determination, having applied in 2024.

The single turbine Culzean Floating Offshore Wind Turbine Pilot entered its Option Agreement in 2025 having secured consent in 2024. These are important steps for the project which will be used to electrify operations at Total's Culzean offshore gas facility in the North Sea.

The 2GW West of Orkney Wind Farm secured its offshore consent from Scottish ministers in June 2025, making it the first ScotWind project to secure both onshore planning permission and offshore consent – a significant milestone for the ScotWind leasing programme.

July 2025 saw two major developments. First, the biggest project in the Scottish offshore wind pipeline secured its consent; at 4.1GW, Berwick Bank offshore wind farm could be the world's biggest wind farm, capable of powering more than six million homes. The project was then successful in securing a UK Contract for Difference (CfD) in AR7 for 1.4GW of the overall capacity.

Second, the Salamander Offshore Wind Farm became the first of the Innovation and Targeted Oil & Gas (INTOG) Innovation projects to secure offshore consent and enter its Option Agreement with Crown Estate Scotland. This floating offshore wind project will demonstrate a number of technologies that will help enable future commercial scale floating projects.

Transactions

2025 was notable for the number of investments in the Scottish offshore wind portfolio. Such transactions are a normal part of the development of such large-scale infrastructure projects.

The Morven (ScotWind) and Flora (INTOG Innovation) projects are now owned by a new joint venture, JERA Nex BP, bringing them wider relationships and access to financing.

Odfjell Oceanwind became the majority shareholder in the Salamander (INTOG Innovation) project. Odfjell Oceanwind's Deepsea Star™ floating foundation technology will now form a key part of the Salamander development.

DEME Concessions and Aspiravi now jointly own the fixed Bowdun (ScotWind) project while Qair International have sole ownership of the Ayre (ScotWind) floating project. Thistle Wind Partners will continue to lead the development of both projects.

Nadara took full ownership of the Bellrock, Broadshore, Sinclair and Scaraben projects, acquiring Bluefloat's 50 per cent shares.

Scottish Power Renewables took full ownership of the MarramWind project (ScotWind) with Shell taking full ownership of CampionWind (ScotWind). Shell subsequently made the decision not to proceed with CampionWind as it wasn't aligned with their company strategy.

The Pentland Floating Offshore Wind Farm attracted investment from the Scottish National Investment Bank, Great British Energy and the National Wealth Fund. This investment demonstrates how public investment organisations can work together to help support early-stage technology such as floating offshore wind. In early 2026 Pentland was successful in the CfD auction; a significant milestone for this important floating offshore wind demonstration project.

Unlocking opportunity

In addition to managing seabed agreements, Crown Estate Scotland works with developers and a wide range of industry stakeholders to help enable a sustainable, successful offshore wind sector in Scotland.

Through targeted enabling activity, Crown Estate Scotland helps remove technical, environmental and knowledge barriers, opening up space for industry to innovate, invest and scale across Scotland's offshore wind sector.

In 2025, our activities in this area included:

- Support for innovation and commercial readiness across the offshore wind supply chain through the EMEC Offshore Wind Research and Innovation Programme, helping new solutions move from concept to market, build operational capability and scale deployment in Scotland
- Work to improve industry access to practical offshore wind development knowledge, by mobilising partners to update and publish the 2025 Guide to an Offshore Wind Farm, supporting companies to better understand project lifecycles, interfaces and opportunities to engage in fixed offshore wind
- Enabling environmental resilience alongside offshore wind delivery by coordinating matched funding arrangements through the Scottish Marine Environmental Enhancement Fund (SMEEF), which supported industry-led action to strengthen seabird resilience while maintaining alignment with sector growth
- Advancement of port and infrastructure readiness for floating offshore wind through a technical and commercial study into temporary mooring ("wet storage") of floating wind structures, identifying viable approaches and case studies for ports including Cromarty Firth and Scapa Flow to support future deployment at scale

Performance in Scotland

The Neart na Gaoithe offshore wind farm became fully operational in July. With 54 turbines, it delivers a total generating capacity of 450MW.

The Moray West offshore wind farm, which will have a generating capacity of 882 MW, is currently ramping up to full operational status and is expected to reach that milestone in 2026.

Offshore construction is now well-advanced for the Inch Cape wind farm with cabling, a substation platform and a number of monopiles installed by the end of the year. First power is targeted for late 2026 and full operation for 2027, at which point its 72 turbines will have a capacity of 1.08GW – enough to power more than half of Scotland's homes.

Capacity constraints continued to create challenges for the Scottish transmission network in 2025 as more wind farms entered operation, with ongoing curtailment of generation potential. The transmission and grid reinforcement programme underway should help to alleviate grid congestion, reduce bottlenecks in the system and address the constraints placed on Scottish assets.

This programme includes:

- The Eastern Green Link cables from Scotland to England, which are grid infrastructure upgrades (known as "the bootstraps"). There are currently five cable routes planned to be built by the Transmission Owners on both sides of the border, which will help to transport Scotland's surplus of electricity to where the greatest demand is in England
- A series of "domestic" reinforcement cables in Scotland which connect areas wholly within Scotland such as the mainland and the islands

Offshore hybrid assets (OHAs) or multi-purpose interconnectors (MPIs) may also form part of the solution to this challenge. These are a relatively new asset type in the UK, combining the domestic connection of offshore wind with an international interconnector, which have been more widely discussed in recent months. Although there is currently no Ofgem regulatory framework for such assets, Crown Estate Scotland is aware of several potential projects of this type which could be brought forward at the right time.

Arrival of Inch Cape's first XXL monopiles at the newly completed Charles Hammond Berth in the Port of Leith in October 2025
Photo: courtesy of Inch Cape

“Offshore wind provides a huge opportunity for Scotland – not just in supporting the decarbonisation of the UK’s energy system, but also through investment opportunities, supply chain expansion and jobs. The past year has seen steady progress for a number of projects and whilst ongoing work will be needed to support grid and consenting, the future for the sector continues to look bright.”

Ronan O’Hara
Chief Executive,
Crown Estate
Scotland

Neart na Gaoithe (NnG) Offshore Wind Farm

Neart na Gaoithe (NnG) is Scotland’s newest offshore wind farm. Despite facing unprecedented challenges throughout development and construction stages, including the COVID-19 pandemic and technical issues with drilling, electrical work and installation offshore beyond those usually experienced, it became fully operational in July 2025, contributing to energy security, the climate and communities. Key facts include:

- Contributed over £200 million to the economy through direct contracts with suppliers in Scotland during construction
- 50 long-term jobs created in the Eyemouth area
- Total capacity of 450MW, equivalent to generating enough renewable power for more than 375,000 homes
- 54 turbines
- Two export cables and two offshore substations
- Covers an area of approximately 105km^2
- Has launched one of Scotland’s most comprehensive seabird and marine monitoring studies to gather round-the-clock data on how key bird species behave around operational turbines
- It will offset over 400,000 tonnes of CO_2 emissions each year
- The project won the Outstanding Project Award at the Scottish Renewables Scottish Green Energy Awards in December 2025
- Over £6 million being delivered to communities through Community Benefit Funding during the project's life

Neart na Gaoithe wind farm
Photo: courtesy of NnG

Health, safety and wellbeing

The offshore wind sector brings with it a range of potential health and safety risks such as working at height, harsh marine conditions, vessel transfers, heavy lifting operations, and working in remote environments.

The health, safety and wellbeing of everyone working in this continually growing sector is paramount and the statistics on the following pages show how the UK is performing in this area.

20%

Increase in hours worked in the UK offshore wind sector

A wind farm technician in full safety gear, conducting turbine maintenance

Note: Data shown in this section is from the G+ annual incident data report for 2024. See Health and safety statistics | G+ Offshore Wind Health and Safety Organisation

Overview

The health, safety and wellbeing of the people who work in this increasingly important and growing sector is vital. As projects move further offshore and into deeper water, and new technologies are brought into use, new risks and challenges emerge: more challenging weather conditions, longer transit times for personnel, safe access and transfer between vessels and turbines, and coordination between a growing number of users of sea space.

Recent near misses, and incidents such as the tanker collision off the East Yorkshire coast in March 2025, underline the risks associated with the offshore environment and the importance of continuous improvement in health, safety and wellbeing procedures. They also demonstrate the sector's commitment to putting people and safety first and responding quickly and efficiently during incidents.

Data in this section, which is from the latest G+ 2024 incident data report, shows that UK Lost Time Injury Frequency (LTIF) and Total Recordable Injury Rates (TRIR) – which are per million hours worked – increased in 2024, and remain higher than global rates. This data, against the backdrop of expansion into deeper waters with more challenging conditions, signals the need for greater focus on health, safety and wellbeing systems across the sector.

SAFETY FIRST
Make Safety First Personal

The Crown Estate recognises these challenges and, through its Marine Safety First approach, works closely with customers, industry groups, marine stakeholders, and governments, with one clear mission – to enable the Safest Marine Environment in the World.

The approach embeds a 'Safety First' culture into all areas of work, strengthening preventative controls and ensuring learning from incidents and good practice is reflected in planning, leasing design and ongoing operations.

This commitment is demonstrated in recent work to conduct detailed spatial safety risk assessments for potential future offshore wind sites. The resulting safety evidence base has been integrated into the Marine Delivery Routemap which means spatial planning scenarios can now be adjusted to identify the safest possible locations for future wind farms.

Fig 23

Global offshore wind industry recordable injuries
(2023 v 2024)

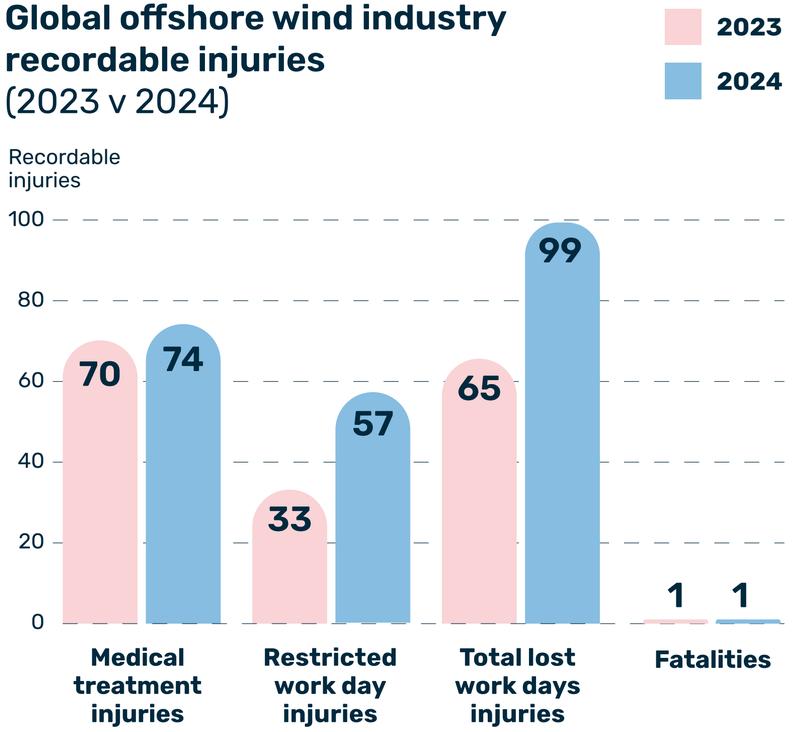


Fig 24

LTIF and TRIR percentage values
(2023 v 2024)

Lost Time Injury Frequency (LTIF)[1] and Total Recordable Injury Rate (TRIR)[2] are key indicators of the effectiveness of health and safety procedures and figure 24 shows comparative data for 2023 and 2024.

1. LTIF represents the number of fatalities and lost work day injuries per million hours worked
2. TRIR represents the number of fatalities, lost work day injuries, restricted work day injuries and medical treatment injuries per million hours worked

Fig 25

UK top three work processes causing most incidents in 2024

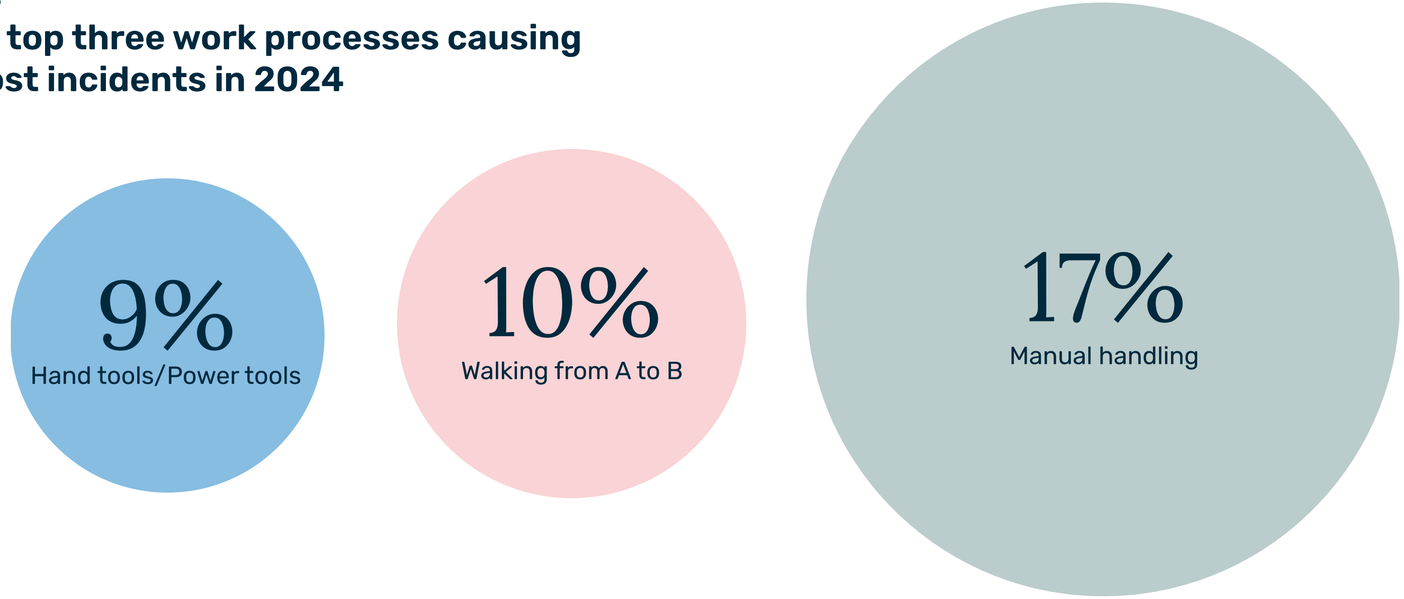


Fig 26

UK incident consequence profile 2024

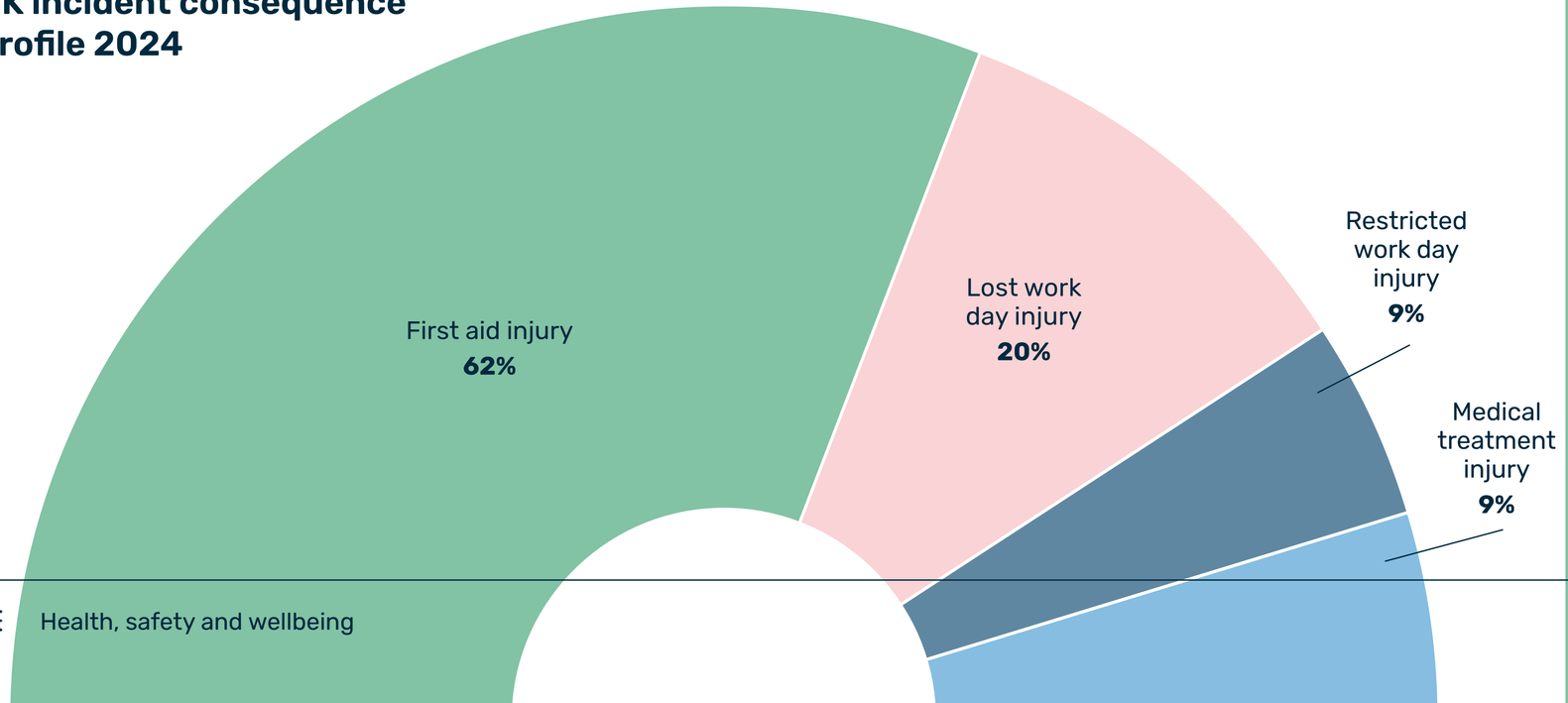
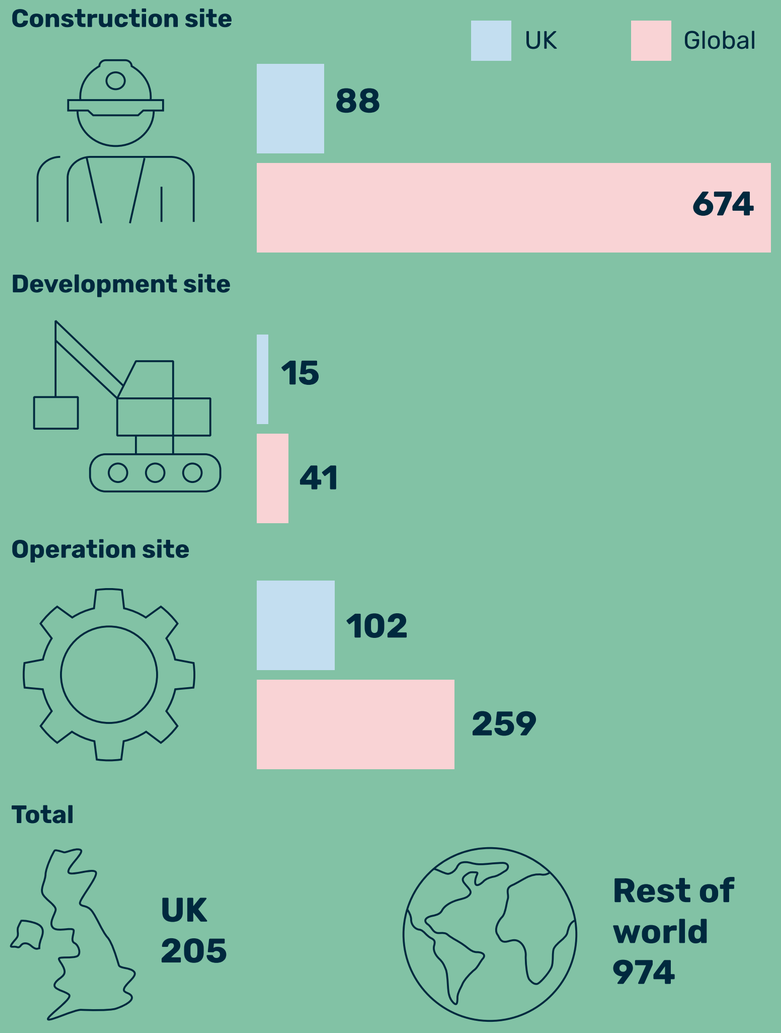


Fig 27

Number of incidents by site type 2024

UK v rest of the world



Diversity and skills

The UK offshore wind sector is creating a wave of new job opportunities for current and future generations.

This section covers some of the key initiatives launched in 2025 to build the diverse, skilled and resilient future workforce which will be a critical factor in the sector meeting its long-term growth potential.

90%

Of UK oil and gas workforce with skills that are transferable into offshore renewables.[1]

A female technician at work in nacelle hub at Rampion Offshore Wind Farm

1. Robert Gordon University (RGU) Energy Transition Institute (ETI): Powering up the Workforce: The future of the UK offshore energy workforce, September 2023

Overview

The substantial pipeline for UK offshore wind brings with it a wealth of long-term job opportunities. In 2025 RenewableUK published the latest **Wind Industry Skills Intelligence Report**. It highlights that just under 40,000 people currently make up the offshore wind workforce, and by 2030 this number could rise to 94,000.

During 2025 a wide range of initiatives were underway to help meet this future demand and build a highly skilled workforce to drive the UK offshore wind sector forward. This included developers launching new rounds of apprenticeships and a significant amount of investment in the supply chain, creating new job opportunities across the country **(see p. 38)**.

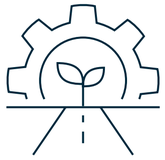
Packing operations at the Siemens Gamesa factory in Hull
Photo: courtesy of Siemens Gamesa

Building the talent pipeline

The **Clean Energy Jobs Plan**, published by the UK Government in 2025, sets out how it will work in partnership with industry and trade unions to deliver a talented pipeline of skilled workers for the clean energy sector. Actions include:

Supporting engineering skills through education

Establishing five Clean Energy Technical Excellence Colleges (TECs)



Investment to aid the transition of North Sea workers into clean energy sectors

Funding skills pilots in three areas to support those wanting to move into clean energy

The Scottish Government also published its **Offshore Wind Skills Priorities and Action Plan** to support the training of specialist electricians, engineers and technicians who will be key to the expansion of Scotland's offshore wind sector.

RenewableUK, working closely with government and trade unions, represented industry in discussions on the development of a Fair Work Charter for Allocation Round 8, to ensure high-quality, well-paid jobs across development, operations and the UK's expanding supply chain, while investing in training, strengthening employment practices and reinforcing the industry's world-leading approach to health and safety.

Offshore Energies UK (OEUK) and RenewableUK also launched a new Energy Skills Passport, supported by the UK and Scottish Governments. The online tool aims to help oil and gas workers transition into renewable energy roles, including offshore wind. It maps out potential future career pathways within the energy sector based on an individual's existing skill set and career aspirations and provides training recommendations.

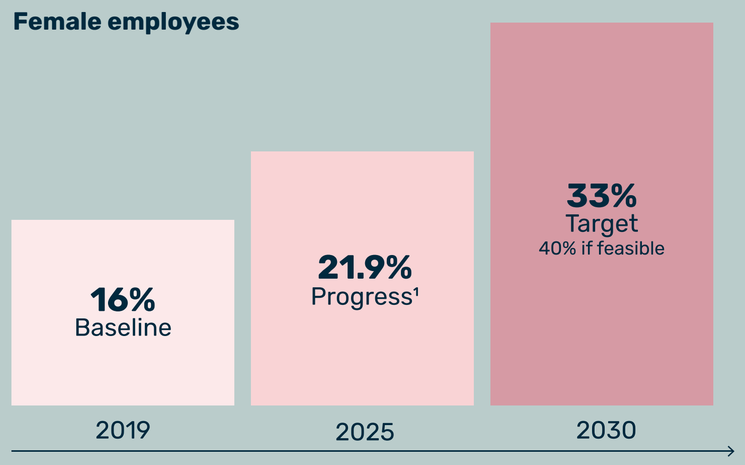
Supporting a diverse and inclusive workforce

The proportion of women working in the sector continued to increase, from 20.6 per cent in 2023 to 21.9 per cent in 2025. This is set against a Sector Deal workforce target of 33 per cent female representation by 2030. The proportion of the offshore wind workforce belonging to an Ethnic Minority Group (EMG) was 7.2 per cent in 2025, against a target of 9 per cent by 2030. While this is an increase on the 2019 baseline of 3.7 per cent, the representation has not increased since 2023, as illustrated in figure 28 on **p. 33**.

The Diversity & Inclusion best practice guide, produced by the Offshore Wind Industry Council (OWIC), provides businesses in the offshore wind sector with advice to measure and address diversity and inclusion across their workforce. In 2025, research was undertaken to update the guide to reflect the latest industry insights, current research, and tools and strategies for leaders, managers, HR professionals, and teams, to create workplaces where everyone feels included.

Fig 28

Offshore Wind Sector Deal targets and progress



1. 20.6% in 2023
2. 2019 figure re-baselined in 2021 because of increased accuracy in data collection
3. 7.2% in 2023

Driving social value through offshore wind investment

RenewableUK is currently finalising research to examine how its members undertake social procurement across the offshore wind sector. This has involved interviews with developers and supply chain to develop a view of best practice, areas for improvement and recommendations for the sector. The report, due to be published in 2026, will examine how effectively current social procurement practice supports the strategic workforce goals identified in the Clean Energy Jobs Plan and recommendations for how the offshore wind sector can deliver inclusive, regionally balanced, high-quality employment and maximise social value outcomes.

This approach can be seen in **The Crown Estate's Offshore Wind Leasing Round 5**, which required bidders to set out plans for creating onshore benefits from the development of the new wind farms. This included committing to ensuring that at least 3.5 per cent of the project workforce consists of apprenticeships and that a minimum of 10 per cent of project employees aged 19-24 are not currently in education, employment or training. Read more on **p. 11**.

Students learning engineering and environmental skills at Falmouth Marine School

Working with academia

The Crown Estate is also supporting skills development. 2025 saw the second cohort of students begin a new GCSE-equivalent qualification focused on engineering and environmental skills for the offshore renewable energy industry. The course is funded by The Crown Estate and based at Falmouth Marine School in Cornwall, an area set to benefit from the offshore wind development planned for the Celtic Sea. This short video – **Supporting Skills for Offshore Wind** – describes the benefits of this initiative.

In Wales, the NPTC Group of Colleges (formerly Neath Port Talbot College and Coleg Powys) and Pembrokeshire College are using funding from The Crown Estate's Supply Chain Accelerator (see **p. 38** for more information on this fund) to understand the training requirements needed to support the development of a new UK supply chain for floating offshore wind in the Celtic Sea. This could lead to the creation of new training facilities in these regions, including a Floating Offshore Wind (FLOW) Skills Academy facility in Port Talbot and a skills transition centre in Pembrokeshire.

The Crown Estate also champions the UK's research community, investing in Centres for Doctoral Training to build greater alignment between academia, industry and policy and funding five PhD placements in 2025 to advance research into offshore wind. Find out more about The Crown Estate's commitment to building data and evidence on **p. 37**.

Paving the way for long-term growth

It is because of decisions taken over the last 25 years that the sector now delivers the value illustrated in this report.

This section covers the strategic actions and investments being taken today to ensure the sustainable growth of the sector over the next 25 years, so that the UK continues to reap the benefits. It includes progress on the Marine Delivery Routemap, future leasing opportunity, activity to support nature, developments in data and evidence, and support to build the UK supply chain.

£1bn

£1 billion of funding announced to improve supply chain readiness

Vessel and wind turbine array at Gwynt y Môr wind farm

Creating space for future offshore wind opportunity

The sustainable and accelerated growth of the UK offshore wind sector relies on enough viable seabed space being made available over the coming decades. The UK is undertaking pioneering work to identify how this can be achieved in a holistic way, considering all the users of the marine environment.

Marine Delivery Routemap

At the heart of this is The Crown Estate's Marine Delivery Routemap. This new digital platform is designed to dynamically model and map potential use scenarios for the seabed and coastline around England, Wales and Northern Ireland over the coming decades across a range of critical sectors. It shows how different users interact and explores potential pathways for future seabed use over time.

In 2025 The Crown Estate continued to work with regulators, industry, environmental organisations and other seabed users to develop the Routemap, and in early 2026 a pilot of the Routemap tool was launched to stakeholders. Feedback from this pilot will inform our next steps in providing wider access to the tool.

The Routemap has underpinned our work to identify future areas of opportunity for offshore wind. In March 2026, The Crown Estate announced its intention to launch a new leasing round – **Offshore Wind Leasing Round 6** – which will be the first to come to market informed by our new routemap-led approach.[1] Expected to launch in 2027, it could have a capacity of around 6GW, create up to 10,000 direct jobs and deliver a potential economic boost to the UK of over £12 billion – fuelling growth in one of Britain's most exciting energy sectors.

Read more about the Marine Delivery Routemap here.

The Crown Estate works with a wide range of stakeholders to explore practical ways in which sectors can co-exist in the busy marine space. For example, the Fisheries Liaison with Offshore Wind and Wet Renewables group (FLOWW) comprises approximately 40 organisations with an interest in offshore renewables and the fishing industry, including fishing industry bodies and representatives from developers, government and The Crown Estate. In 2025 FLOWW published updated **best practice guidance** intended to foster mutual understanding and cooperation between the fishing industry and the offshore renewable energy sectors.

> "The Marine Delivery Routemap builds on our world-leading expertise and marine data capabilities to plot a sustainable course for the competing demands on our seabed."
>
> **Julia Rose,** Head of Offshore Wind, The Crown Estate

Photo: © Kirsty Andrews, highly commended, Underwater Photographer of the Year, 2026

1. A seabed for future generations I The Crown Estate

Photo: © Malcolm Nimmo, highly commended, Underwater Photographer of the Year, 2026

Supporting offshore wind and nature to thrive

As manager of the seabed around England, Wales and Northern Ireland, The Crown Estate is committed to supporting the sustainable growth of the offshore wind sector in a way which supports a thriving natural environment.

This ambition is part of The Crown Estate's wider approach to ensure that nature is prioritised alongside energy, infrastructure and other essential uses of the seabed.

To turn this ambition into action, The Crown Estate has established a set of Marine Nature Principles to:

Unlock space for nature to thrive

Protect vulnerable habitats and species

Deliver positive outcomes for nature and people

Promote sustainable investment in nature

These principles guide The Crown Estate's decision-making across all of its activity in the marine space – including supporting the accelerated growth of offshore wind – helping make choices which allow industry and nature to co-exist and thrive.

The Crown Estate's publication **'Unlocking a Resilient Blue Future: Delivering for Nature as part of a thriving Marine Economy'** sets out how the Marine Nature Principles will guide its approach to activity in the marine environment, including how the use of the seabed is planned; how to think about where infrastructure might go; how to work with partners to design infrastructure; how to actively restore nature; how to lease the seabed; and how to use its capital to support nature. It includes a section on how this applies to the offshore wind sector.

> "A test for all of us is whether we have left the world in a better place for the next generation – the time to fulfil that test is now."
>
> **Caroline Price**
> Head of Nature & Environment, The Crown Estate

Using data and evidence to drive sustainable growth

At the heart of the UK's offshore wind success is a lasting commitment to invest in the gathering and sharing of data and evidence. For over 20 years, The Crown Estate has been bringing together a wide range of marine stakeholders to identify and address evidence gaps, gather new insights and use data to drive positive change in the sustainable development of the seabed.

The Crown Estate invests in survey data to de-risk the seabed, national datasets to support spatial planning activities, strategic projects that address cross-sector evidence needs, and large evidence programmes such as the **Offshore Wind Evidence and Change (OWEC) programme**.

This data, evidence and research is made freely available through The Crown Estate's world-leading **Marine Data Exchange** platform. The valuable insights benefit everyone in the sector and facilitate informed, evidence-based decisions to address consenting and planning challenges. OWEC-established initiatives, such as the **Offshore Wind Evidence and Knowledge Hub (OWEKH)** and the Offshore Wind Environmental Evidence Register (OWEER), target knowledge gaps to de-risk and accelerate the delivery of clean offshore technologies, whilst enabling our marine and coastal ecosystems to thrive.

> "Decisions driven by evidence protect the future of our oceans."
>
> **Olivia Thomas**
> Head of Planning & Technical, Marine, The Crown Estate

The Crown Estate's investments into data and evidence, including data gathered from industry, are driving real-world action to support the accelerated, sustainable growth of the offshore wind sector. It:

Drives informed ways of working
For example, the National Federation of Fishermen's Organisations' Virtual Floating Offshore Wind Farm Planning project[1] helped us develop best practice for fisheries engagement.

Shapes the policy conversation
For example, the East Coast Grid Spatial Study,[1] delivered in collaboration with industry partners, was a key input to NESO's development of a Holistic Network Design.

Supports offshore wind deployment
The Ornithological Headroom[1] project informed an update to the National Policy Statement for Energy, which has helped to reduce precaution in cumulative effects assessments for seabirds.

Develops spatial data to support the Marine Delivery Routemap
For example, a seabed geology project in partnership with the British Geological Survey has improved the understanding of geohazards on the seabed.

Find out more about our evidence projects and programmes here: **Data and Evidence projects I Marine Data Exchange**

1. Funded through the OWEC programme

Shared communities of practice

For the offshore wind sector, it is essential that we not only understand the priority evidence gaps but also bring together a shared community of practice capable of reviewing, interpreting and consolidating the diverse data and insights needed to support rapid, high-quality consenting. OWEKH provides this unique collaborative forum — uniting regulators, industry, researchers and technical specialists to compare perspectives, build consensus, and develop robust guidance that adapts, anticipates and addresses emerging consenting risks. Complementing this, OWEER offers a transparent, centralised view of the existing evidence landscape, capturing ongoing research, tracking progress against known evidence gaps, and identifying where new investment or coordinated action is required.

Together, OWEKH and OWEER establish a framework that strengthens the sector's capacity to plan strategically, focus effort where it is most needed, and accelerate nature-positive offshore wind development.

Photo: © Dan Bolt, runner up, Underwater Photographer of the Year, 2026

Building the supply chain

The UK offshore wind supply chain continued to grow in 2025, with announcements such as the opening of RWE's Operations and Maintenance facility at the Port of Grimsby, the opening of the Offshore Renewable Energy (ORE) Catapult's Technology Development Centre in Blyth in the North East, and Ørsted signing a lease agreement for space at the Port of Tyne to support construction of the Hornsea 3 offshore wind farm. These, and other announcements, demonstrate continuing confidence in the UK market.

£1 billion of coordinated support

In 2025, the UK's leading public finance institutions, investment bodies, governments and industry bodies came together to establish an integrated public and industry finance ecosystem, worth £1 billion,[1] to support supply chain growth and the delivery of the Industrial Growth Plan.

More about this funding follows beneath:

Great British ENERGY

Great British Energy

The GBE Supply Chain Fund: Offshore Wind and Networks.
This £300 million fund is aimed at growing domestic manufacturing capacity for key constrained components. The application window closes in December 2026. It forms part of Great British Energy's £1 billion Energy Engineered in the UK[2] (EEUK) programme to mobilise public and private investment to unlock critical supply chains and create thousands of skilled jobs.

Offshore Wind Growth Partnership

The Offshore Wind Growth Partnership

The **Offshore Wind Growth Partnership (OWGP)** launched a new programme offering funding from £300,000 to £25 million for supply chain projects, to support investment priorities set out in the Industrial Growth Plan. Funding for this programme comes from Offshore Wind Industry Council (OWIC) developer members through the Clean Industry Bonus (CIB), and is designed to accelerate capital investment in domestic manufacturing of key components, systems and services into the offshore wind sector.

Supply Chain Accelerator

The Crown Estate

Drawing on the new investment powers conferred by the Crown Estate Act 2025 which received Royal Assent in March 2025, The Crown Estate set out expanded investment plans to build infrastructure and capability. This comprises:

- A £50 million **Supply Chain Accelerator Fund** launched in 2024 to provide early-stage development funding to offshore wind port and supply chain projects, helping them to become investment-ready. By the end of 2025, £17.5 million of this fund had been awarded to 28 projects located across the UK, ranging from ports to manufacturing, testing and education facilities.
- A **Supply Chain Investment Programme** which will make available up to £350 million of capital investment over the medium term to fund construction for ports and supply chain projects.

This investment forms part of continued collaboration with Great British Energy to align strategic priorities to support supply chain readiness, economic growth, and ensure the UK can deliver offshore wind efficiently and sustainably.

> "Scaling up investment in our domestic supply chain will propel the UK towards its clean energy goals and take our world-leading sector to the next level."
>
> **Gus Jaspert CMG**
> Managing Director, Marine,
> The Crown Estate

1. The £1bn of coordinated support comprises the £300m **GBE Supply Chain Fund: Offshore wind and networks**; supply chain funding from the OWGP; and The Crown Estate's ambition to invest up to £400m to build supply chain capability and infrastructure
2. £300m of this is specifically targeted at building manufacturing capacity for offshore wind. Read more here.

Thank you for reading...

Share your thoughts

We hope that you have enjoyed reading this report, reflecting on the progress made by the UK offshore wind sector over the last 25 years, and looking at how the sector is powering up for future growth.

If you would like to share feedback on the report, or talk to one of the team, please contact us at **offshorewind@thecrownestate.co.uk**

You can also find more information about The Crown Estate's work to support the UK offshore wind sector at **thecrownestate.co.uk**

> "We are excited to be working alongside all those involved to write the next chapter of the UK's successful offshore wind story and build a thriving marine environment for generations to come."

Gus Jaspert CMG
Managing Director,
Marine,
The Crown Estate

Calculating CO_2 displacement (referred to on pp. 6 and 13)
A **2014 study** of greenhouse gas emissions of the UK electricity system demonstrated that wind power displaces coal- and gas-fired power stations, and that partial loading of fossil-fuelled power stations has an efficiency penalty of 11%. The Crown Estate calculates C02 displaced by offshore wind by using the latest DESNZ emissions statistics for 'all fossil fuels' and subtracting 11% to account for the induced efficiency penalty.

Gwynt y Môr wind farm

Kincardine Offshore Wind Farm
Photo: courtesy of Principle Power

Report designed by Harrison Fraser.

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