

SOWEC 2025 Annual Review

Creating a world-class offshore wind sector for Scotland



Contents

| | |
|---|----|
| Introductory forward | 4 |
| Outlook and priorities for year ahead | 5 |
| Offshore wind ambition | 6 |
| Developers Group | 8 |
| Supply Chain Development | 10 |
| Innovation | 12 |
| Innovation in action | 14 |
| Workforce, Skills and Training | 16 |
| Offshore Wind Skills Action Plan | 18 |
| Environment and Planning, Data and Route to Market | 20 |
| Communities and Stakeholders | 22 |
| Celebrating industry progress | 24 |
| Project Management Office Report | 26 |

Introductory foreword



GILLIAN MARTIN
CABINET SECRETARY FOR
CLIMATE ACTION AND ENERGY
SOWEC CO-CHAIR

I am pleased to have returned to the role of SOWEC co-chair during 2025. I am encouraged by the strength of collaboration across the partnership and the collective determination to turn ambition into delivery in terms of offshore wind deployment and ensuring we reap the economic benefits of that.

2025 was a significant year for offshore wind in Scotland. The Scottish Government continued to streamline consenting processes whilst the positive determinations of Berwick Bank, West of Orkney (the first ScotWind project to secure consent) and the Salamander innovation project were significant steps forward.

Meanwhile we continued to invest to anchor the offshore wind supply chain in Scotland. Announcements included up to £24m grant funding for Kishorn Port, up to £10m grant funding for the Port of Nigg and over £12m of support for Lerwick, Scapa and Montrose ports.

Following the review of SOWEC's workstreams in 2025, the partnership has moved further into delivery mode. The refreshed themes provide a clearer, more coherent framework for action, supporting industry and government collaboration on the practical steps required to accelerate progress and maximise economic value for Scotland.

I am grateful to all who contribute their time and expertise to SOWEC. Your commitment has underpinned the progress made in 2025 and will remain essential as we continue this journey into 2026 and beyond.

Outlook and priorities for year ahead



CLAIRE MACK
CEO, SCOTTISH RENEWABLES
SOWEC CO-CHAIR

The last year in the SOWEC calendar felt rapid; lots of issues to tackle and an ever-accelerating timeline in which to achieve our objectives. The mood shifted to pragmatism and minds were focused deeply on delivery as we supported the development of pioneering new frameworks for compensation and saw monumental change in the way we approach allocation of grid – a key determinant in project delivery. This coming year will bring equally challenging issues, but it will also highlight the realities of delivering fixed-bottom offshore wind at scale, alongside advancing floating offshore wind at a pace that enables us to secure the additional outcomes we want for our supply chain.

Two key projects; Berwick Bank and Pentland secured in January this year through the Contracts for Difference AR7 give us a pipeline to work with but efforts need to be redoubled to ensure success at future auction rounds. Across the SOWEC brief we come together as industry and government to provide that assurance that the big issues are being addressed and that will help reduce risks across the whole development cycle. I remain exceptionally proud of our track record of offshore wind delivery here in Scotland and excited about our future pipeline.

Projects need us to double down on our support for the transmission infrastructure and charging mechanisms essential to get clean power to the market as well as seizing funding opportunities by identifying our core capability strengths, building on them and branching out into new ones that will grow us as a sector. A firm focus on skills will stay with us at SOWEC for 2026 and beyond as we ensure that people are indeed at the centre of the energy transition. We work together for everyone in pursuit of bringing these beautiful, technically innovative and important projects to life.

Offshore wind ambition

Vision

A world-class offshore wind sector that underpins the transition to net zero by 2045 and maximises the value to Scotland.

Mission

To coordinate and grow the sector, ensuring the Scottish offshore wind industry is more sustainable, competitive, and commercially attractive, both domestically and in the global offshore wind market.

Goals

- ◆ Establish Scotland as a world-class offshore wind sector at the leading edge of technology innovation, driving excellence in efficiency, productivity, safety, and sustainability
- ◆ Support a transformational and rapid increase in economic value, delivering a world-class supply chain in Scotland
- ◆ Develop a highly skilled and diverse workforce, support new entrants, expand apprenticeships and enable transitioning from existing sectors whilst inspiring the future talent pipeline and increasing participation by currently underrepresented groups
- ◆ Champion offshore wind's contribution to achieving Scotland's net zero commitment by 2045, incorporating the oil and gas transition, hydrogen and wider energy system integration
- ◆ Overcome barriers to the deployment of offshore wind in Scottish waters, working with stakeholders to accelerate the delivery of key enabling infrastructure to achieve 2040 commitments, that will contribute to a just transition
- ◆ Promote collaboration with relevant stakeholders which aims to ensure offshore wind infrastructure deployment has a positive net gain to biodiversity in Scotland and the marine environment

Our strategy

2025 saw a review of our subgroups and workplans to ensure they were fit for purpose – the sector has evolved significantly since the Council was established in 2019. Our priorities are now delivered through six themes alongside our project management office (PMO):

- ◆ **Developers Group:** provides developer insight into the challenges and opportunities facing the industry and action required
- ◆ **Supply Chain Development:** aims to support the development of the supply chain to ensure it is globally competitive
- ◆ **Innovation:** seeks to identify and communicate the latest innovation techniques, initiatives, and processes
- ◆ **Workforce, Skills and Training:** working collectively to identify and understand skills demand, ensuring the required skills and training opportunities are in place
- ◆ **Environment and Planning, Data and Route to Market:** coordinates action to deliver an effective enabling environment for offshore wind, also manages the Communities and Stakeholders workplan
- ◆ **Industrial Strategies and Investment:** a newly established theme which works with organisations including the Scottish Government, Scotland's enterprise agencies, Crown Estate Scotland and the Scottish National Investment Bank to synthesise key information across public body partners. This supports the sharing of insight across Team Scotland and helps ensure Scotland's interests are well represented in UK-wide policy, strategy, funding and investment decisions

A governance review has been undertaken as good practice, with refreshed terms of reference being developed for SOWEC, the subgroups and the project management office. These will be ready for finalisation and approval in the coming months.

Effective representation

We strengthened our relationship with the Offshore Wind Industry Council, our UK counterpart, for a coordinated and collaborative approach. This has ensured our resources are focussed appropriately and avoided duplication of effort while still making sure the interests of the Scottish sector are served at a UK level.

Ensuring representation for the Scottish sector on other key forums is also crucial and SOWEC contributed to:

- ◆ **The Offshore Wind Growth Partnership:** dedicated to strengthening the supply chain by providing private funding and business support to companies to help them innovate, scale and compete globally
- ◆ **Industrial Growth Plan (IGP) Delivery Body:** the stakeholder group driving forward implementation of the IGP which aims to grow the supply chain, as well as increasing market share and improving technology leadership for the UK sector
- ◆ **Interim Fair Work Charter for offshore wind:** a tripartite agreement between unions, business and government to ensure clean energy jobs meet the standards set out by the Department for Energy Security and Net Zero's Clean Energy Jobs Plan
- ◆ **Great British Energy:** the newly established publicly owned energy company based in Aberdeen that aims to deliver the benefits of a cleaner, more secure energy system to the British people

SIM transition

Though the SIM process has closed, its impact continues to shape investment conversations and project development across the sector. SOWEC is proud to have delivered a groundbreaking framework that connected project proponents with developers, investors, and public agencies — helping to translate ambition into credible opportunities.

The SIM saw 37 port and supply chain projects supported to develop investment proposals and a further 29 of these projects received collaborative support. Supported projects continue to advance through established investment and enterprise channels.

SIM demonstrated the art of the possible, spotlighting innovative projects, strengthening market visibility, and accelerating pathways to both private and public investment.

The programme's success has been widely recognised, earning industry awards and influencing similar models elsewhere in the UK and Europe. This legacy underscores Scotland's leadership in collaborative investment approaches. SOWEC also recognises and thanks the many partners and project proponents whose engagement and ambition were central to the programme's success.

Developers Group

Purpose

The Developers Group ensures an industry lens is applied to SOWEC initiatives. It brings together developers with projects in Scotland to share insight on the challenges facing project delivery and opportunities to address them. Through collaboration with other SOWEC groups, it helps ensure initiatives reflect practical industry experience.

Mark Baxter, chair of the Developers Group, reflects on progress made in 2025

As we look back on 2025, the Scottish offshore wind sector has transitioned from a phase of high-level ambition to one of focus and delivery. Representing the core developer membership of SOWEC, our group remains the reference for priorities that enable the movement of projects from seabed lease, to consent award, to investment decision and, ultimately, construction and 30+ years of operation. This year has been defined by the maturation of the ScotWind and Innovation and Targeted Oil & Gas (INTOG) projects, which together represent one of the largest project pipelines globally.

Maturing the pipeline: ScotWind and INTOG

The past twelve months have seen significant milestones across projects. For ScotWind and INTOG we have seen a steady flow of Environmental Impact Assessments (EIAs) submitted to the Marine Directorate. This signals the industry's readiness to move to the next stage of projects, looking toward upcoming Contracts for Difference Allocation Rounds. Many projects are continuing to carry out offshore and environmental surveys to help ensure robust data sets to support consent applications.

An enabling environment is vital to deliver successful projects and mobilise the broader economic benefits of offshore wind in Scotland. The Sectoral Marine Plan and Scottish Marine Recovery Fund, due to be published in 2026, will be an important milestone which will help support the progression of projects through the consenting process and beyond, providing a streamlined approach which effectively balances economic, social and environmental objectives.

Strengthening the Scottish supply chain

The Strategic Investment Model (SIM) has transitioned from a formal programme, with its impact reflected in the continued advancement of proponent projects supported through Scotland's investment ecosystem. Continuing the public and private sector collaboration remains important, ensuring that Scottish supply chain opportunities are secured via funding opportunities that exist in the current offshore wind landscape.

Recent investments in port infrastructure and component manufacturing as a result of funding from the up to £500m secured from the Scottish Government have been welcomed by developers, increasing the opportunity to generate local content opportunities.

In addition, work got underway on updating ScotWind and INTOG Supply Chain Development Statements (SCDSs) which detail the commitment to developing a sustainable offshore wind supply chain in Scotland – the initial ScotWind process confirmed an average commitment to Scottish spend of £1.4bn per project

Policy and Grid: navigating the bottlenecks

The last year has not been without its challenges. The Developers Group has been vocal in engaging with the National Energy System Operator (NESO) and the UK Government to ensure that grid connection timelines align with our project delivery dates. We have advocated for certainty on grid connection dates and fairer risk sharing if connection dates are not delivered on time. This is a critical aspect for projects to be able to move forward.

The issue of Transmission Network Use of System Charges remains a heavy burden for a large proportion of Scottish projects. While reform is on its way, the timetable is not aligned with the pipeline of projects nearest delivery.

We welcomed the recent update to the Offshore Wind Policy Statement, which solidified the ambition for 40GW by 2040. This policy clarity provides the “market signal” necessary to attract the international capital required to build out our sites.

Looking ahead to 2026/2027

As we enter the next cycle, our focus shifts toward Allocation Round 8 (AR8) and beyond. The Developers Group remains committed to ensuring that the Contracts for Difference mechanism recognises the unique cost profiles of both fixed bottom offshore wind and evolution of moving from test and demonstrator sites to large-scale floating wind. The opportunity is clear, but fundamentally projects need to be moving more quickly through consenting and toward a financial investment decision for Scotland to reap the benefits that the rollout of offshore wind at scale could bring.

Developers' mission is clear: to deliver clean, homegrown energy while securing a just transition for Scotland's workforce. The sites we develop today will be the backbone of the Scottish economy for the next half century.

Supply Chain Development

Purpose and goals

The Supply Chain Development group supports development of a Scottish offshore wind supply chain that is globally competitive and has the right capabilities and capacity to succeed nationally and overseas. It helps drive cost reduction, productivity, competitiveness, knowledge, innovation and an increased capability for export.

It is chaired by Lloyd Duthie of Seaway 7, supported by deputy chair Jamie Sansom from Scottish Enterprise.



Scotland's offshore wind industry is fundamental to unlocking net zero, but we must ensure the supply chain is aware of the opportunity and can be ready to take advantage and make potential contractors aware of its capabilities. The group is working to support a coordinated, collaborative approach which reduces risk, supports innovation, and creates economies of scale.



**LLOYD DUTHIE, CHAIR,
VICE PRESIDENT UK, IRELAND
AND ASIA, SEAWAY 7**

2025 progress

The group brings together supply chain members and enablers to coordinate activity and support delivery across The Clean Energy Cluster.

The Clean Energy Cluster

The Clean Energy Cluster is the national voice of Scotland's offshore wind supply chain. Launched in January 2025, the cluster is funded by SOWEC and Scotland's three enterprise agencies. It promotes, connects and guides suppliers who are currently engaged with or wish to engage with the offshore wind sector.

Managed by Scottish Renewables, The Cluster has been engaging with key stakeholders throughout the year to develop its strategic plan. In its first 12 months more than 600 organisations have signed up as members demonstrating the capacity and appetite of the Scottish supply chain to work within the offshore wind sector.

Roundtables were held in Shetland and Glasgow with developers, suppliers, local authorities and other stakeholders to discuss what is needed to accelerate supply chain growth as part of a series aligned to the priority regions in the Scottish Government's Offshore Wind Focus Paper. The Cluster team has also been hosting one to one meetings with members and speaking to the supply chain at events and industry conferences including Floating Offshore Wind, SPE Offshore Europe, Global Offshore Wind and All-Energy.

Ensuring Tier 1 contractors are aware of the capabilities of the Scottish supply chain is essential to create and retain value in Scotland and a number of meetings have been undertaken with international manufacturers to strengthen links.

In addition, The Clean Energy Cluster has been working alongside OWIC and its UK clusters forum, ensuring Scottish representation in their activities.

Supporting access to international markets

The Clean Energy Cluster is actively engaging with the Department of Business and Trade to promote supply chain export opportunities. It has also been building international links via clusters in Norway, France and Germany, supported by Scottish Development International.

Supplier portal

Supply Chain Development group members and developers fed into the creation of the North Sea Transition Authority's Energy Pathfinder, an online portal that brings together relevant tenders and information on buyers into one place for offshore wind operators and potential suppliers.

Forward look

The Scottish Government has commissioned the development of a strategic roadmap to support the future evolution and growth of The Clean Energy Cluster in line with its blueprint for developing a cluster approach for strategic industries across Scotland. It is expected to be published in spring.

The Clean Energy Cluster will continue to work with the North Sea Transition Authority to raise awareness and understanding of the Energy Pathfinder among both operators and suppliers so Scottish supply chain companies can maximise the benefits of these opportunities.

The Supply Chain Development Group is also working with OWIC and Scotland's enterprise agencies on other digital tools to make understanding and accessing supply chain opportunities simpler.



**To find out more and join The Cluster visit
www.thecleanenergycluster.com**

The Clean Energy Cluster Team
Image credit: Scottish Renewables

Innovation

Purpose and goals

The Innovation group identifies and communicates the latest innovation and processes in Scotland's offshore wind industry to support advances in technology adoption, deployment and supply chain development. It aims to increase the amount and impact of research, development and innovation in Scotland focused on offshore wind. This will deliver cost reduction, accelerated deployment and enable Scottish projects to increase local content.

It is chaired by Andrew Macdonald of ORE Catapult, supported by deputy chair Alex Loudon from Ørsted.



Innovation plays a fundamental role in achieving Scotland's offshore wind ambitions. It will drive cost reduction, enable new entrants from oil and gas and, through inward investment and exports, realise considerable economic benefits. Much of our work in 2025 has centred around ensuring existing initiatives are focusing on the right areas and gathering a deeper understanding of the significant activity being undertaken to progress standardisation, particularly in relation to new floating offshore wind technologies – an area in which Scotland is leading the sector.



**ANDREW MACDONALD, CHAIR,
DIRECTOR - DEVELOPMENT & OPERATIONS,
ORE CATAPULT**

Moray West WTGs at Port of Nigg | Image Credit: HIE

2025 progress

Advancing floating offshore wind standardisation

A key priority for the group was providing a better understanding of what needs to be done and what is already being done to support the standardisation of offshore wind deployment, particularly with regards to floating offshore wind (FLOW). Significant stakeholder outreach was undertaken to compile an understanding of current initiatives and approaches, with linkages created between ongoing initiatives to ensure better alignment.

Development of effective long-term innovation programmes

The Innovation group was a key partner in the development of Scottish Enterprise's CAN DO Offshore Wind Innovation Programme, providing evidence and helping define appropriate topic areas. The first round of the CAN DO Scottish Offshore Wind Innovation Feasibility Challenge Fund supported 22 companies with over £1m of funding to develop new products and processes addressing industry challenges while the second-round funding call closed in January 2026.

Similarly, at a UK level the group, through its membership, has fed in invaluable evidence and insight to Innovate UK, the national innovation agency.

A forum for collaboration and coordination

The Innovation group has provided a forum for discussion and coordination between a range of stakeholders including OWIC, the Offshore Wind Growth Partnership, Scottish Enterprise, Highlands and Islands Enterprise and the Net Zero Technology Centre.

Forward look

Supporting the effectiveness of innovation programmes will continue to be a priority and work is ongoing to create links between regional and national activity to ensure alignment and collaboration.

The *SOWEC Innovation Guide* was published in January 2025, demonstrating how offshore wind developers can use innovation projects to help grow Scotland's supply chain and accelerate project delivery. A *series of blogs* will be published throughout 2026 to maximise its impact, providing a deep dive into specific areas of the guide and examining its themes more closely.

Facilitating knowledge sharing around the further development of floating offshore wind will also be crucial as the sector progresses from test and demo sites to commercialisation.



Innovation

Innovation in action: Pict “Get Up Safe” offshore wind personnel access system

Pict Offshore’s groundbreaking system was featured in the *SOWEC Innovation Guide*. The Get Up Safe (GUS) system is an active heave compensated lifting solution, designed specifically for transferring personnel between crew transfer vessels (CTVs) and the main access platform of an offshore wind turbine. It takes away the requirement for crew members to step between their vessel and ladder as well as removing the need to climb up to the platform.

GUS makes access safer, improving health and safety, and by allowing transfers to take place over a larger proportion of the year, improves accessibility. Each high-tech system resembles a small crane and is assembled at a bespoke facility in Inverkeithing, with fabricated parts sourced from local suppliers.



Pict’s GUS system | Image credit: Pict Offshore

Pict’s innovation journey started in 2016 when the company began developing the system and, since the end of 2017, Pict has collaborated with Ørsted to bring GUS to market. In 2021, Pict supplied the GUS system to Ørsted’s Hornsea 2 offshore wind farm where it has replaced landing ladders as the means of access from CTVs on all 165 wind turbines. In 2022 and 2023, the GUS system was supplied to three new Ørsted wind farms in the USA (totalling 161 systems) and is now also being deployed on the offshore substation at RWE’s Thor wind farm project in Denmark. The company’s commitment to innovation has continued with the recent launch of its next generation system - GUSx2.

Innovation in action: CAN DO Scottish Offshore Wind Innovation Feasibility Challenge

The CAN DO Scottish Offshore Wind Innovation Feasibility Challenge is a core strand of Scottish Enterprise’s Offshore Wind Innovation Programme. The initiative offers grant support to Scottish companies developing innovative products and services that can help address key sector challenges in areas including anchors and mooring systems, advanced turbine technology, and foundations and substructures.

Grants of between £30,000 and £50,000 are awarded to companies to conduct detailed design, technical, and/or commercial feasibility projects to help turn ideas into commercially viable and scalable propositions.

The first round of funding provided a boost to accelerate feasibility studies for a range of supply chain businesses:

- ◆ SeaThor
- ◆ Fennex
- ◆ Quoceant
- ◆ TTI Marine Renewables
- ◆ Blackfish Engineering
- ◆ Build the Reef Ltd
- ◆ Napkin Innovation
- ◆ Malin Marine Consultants
- ◆ T12 Engineering
- ◆ Titan Energies
- ◆ Wind Rider
- ◆ GEG Holdings Ltd
- ◆ Trios Renewables
- ◆ Frontier Robotics
- ◆ Ilosta
- ◆ Fathom Group
- ◆ Encomara
- ◆ Reblade
- ◆ Airspection

Workforce, Skills and Training

Purpose and goals

The Workforce, Skills and Training group works collectively to identify and understand skills demand, ensuring that the right skills and training opportunities are in place at the right time. It aims to clearly articulate the sector's skills and workforce demands, informing the design of relative interventions and supporting their implementation through a collaborative approach between industry, skills bodies and education providers.

It is chaired by Stewart McKinlay of the National Manufacturing Institute Scotland, supported by deputy chair Chris Whitehead from Morven Offshore Wind Farm.

2025 progress

Short life working group

The short life working group was established on the recommendation of the SOWEC Workforce, Skills and Training group to develop an *Offshore Wind Skills Action Plan* to focus efforts to support the pipeline of skilled workers needed by the sector. The plan was launched by Deputy First Minister Kate Forbes in November.

The SOWEC Workforce, Skills and Training group will continue to be involved in delivering some of the priority actions. You can read more about the plan overleaf.

Sector recruitment and attractiveness

Promoting the wide range of employment opportunities the sector offers, both now and in the future, is vital to demonstrating sector attractiveness and supporting a strong skills pipeline. The group continued to attend careers events across the country to engage with prospective graduates, informing them of in-demand skills and showcasing high quality clean energy jobs. Events SOWEC has been represented at in 2025 include:

- ◆ UHI Inverness Open Day
- ◆ UWS Get Ahead Speed Networking
- ◆ Green Careers Fair
- ◆ All-Energy Conference
- ◆ The National Apprenticeship & Education Event Edinburgh
- ◆ AGCAS Scottish Graduate Fair
- ◆ Dundee Careers Fair

In addition, the group has been engaging with organisations like the Association for Black & Minority Ethnic Engineers and Equate Scotland to understand how a more diverse offshore wind workforce can be developed.

Ensuring alignment with OWIC and other stakeholders

The group has been supporting SOWEC's wider aim of aligning more closely with OWIC. This has included working with the organisation to ensure its Skills Intelligence Report, which was published in June, was representative of the demand for skills in Scotland where there are slightly different priorities and roles.

Knowledge sharing and identifying best practice across the four nations has been an important part of the group's work, engaging with institutions like Middlesbrough College and initiatives like Catch 22 to capture learnings and encourage collaboration.

Skills for Offshore Wind Portal site (SkillOW)

SOWEC funding was secured in 2024 for the creation of a skills portal, led by ESP, to help workers across the UK's energy mix, including oil and gas, to find new roles in offshore wind. Work has been underway throughout the year to build out the portal on the Offshore Wind Scotland website, with full functionality expected to be available in early 2026.

Forward look

Work in the coming months will include capturing and quantifying the skills and training needs of inward investors and the potential associated requests for public sector support to inform the development and delivery of suitable interventions.

The group will also continue engaging with industry partners to capture and share knowledge and insight including OWIC and the Clean Power 2030 (CP2030) Supply Chain & Workforce Forum.

Delivering on its responsibilities in the *Skills Actions Plan* in partnership with other industry stakeholders will be a priority, specifically focussing on:

- ◆ auditing current industry training programmes and facilities
- ◆ creating an 'Industry in Residence' programme structure
- ◆ identifying gaps in competency routes for priority occupations
- ◆ advice on implementing OWIC's *Best Practice Guide on Diversity and Inclusion* in a Scottish context
- ◆ determining a model for increasing internships and work-based opportunities



The Skills subgroup is playing a key role in bringing developers, supply chain and public sector partners together to help shape the future talent of the industry. 2025 has seen significant progress with the publication of the Action Plan setting out practical next steps and continued engagement and knowledge sharing with partners to develop a more cohesive and collaborative approach to building out our skills pipeline.



**STEWART MCKINLAY, CHAIR,
SKILLS DIRECTOR, NMIS MANUFACTURING
SKILLS ACADEMY**

Aurora Energy Services training facility
Image Credit: HIE



Workforce, Skills and Training

Offshore Wind Skills Action Plan

The action plan was published in November setting out 12 priority actions to be delivered over the next two years to support the pipeline of skilled workers which will be needed by the offshore wind sector in Scotland.

1. Level 5 Engineering Foundation Apprenticeship

Scope and cost the creation of a new Level 5 Engineering Foundation Apprenticeship to increase the pipeline of talent into the sector via engineering apprenticeships.

2. 'Work Ready' programmes and the offshore wind sector

Increase the number of places on the existing college-based Engineering Construction Industry Training Board (ECITB) 'Work Ready' programme, which supports people from under-represented groups, and any other similar initiatives. This will ensure that offshore wind job opportunities are more accessible to those in society who stand to benefit most.

3. Cross-skilling programme for oil and gas workers

Increase the number of places on ECITB's cross-skilling programme for wind turbine technicians to support more experienced and valued oil and gas workers who wish to cross-skill and take up employment opportunities in wind, further supporting a just transition.

4. Scottish wind technician education centre

Establish a strategic partnership to set up a leading hub for Scotland in Global Wind Organisation (GWO) accredited training and wind technician education expanding capacity and capability to support a pipeline of GWO qualified technicians to meet industry demand.

5. Relevant courses on offer in Scottish universities

Review existing provision, including upskilling courses, across Scottish universities which could offer pathways into priority roles. This will quantify existing relevant courses, in the same way as has been done previously in the college sector, to provide a better understanding of existing provision in relation to projected industry demand.

6. Central recruitment information sharing system

Design a model for a central recruitment information sharing system with offshore wind sector employers to ensure that candidates who are unsuccessful in applying for apprenticeships, internships or graduate entry roles are signposted to other relevant opportunities, preventing talent being lost from the sector.

7. Industry training programmes and facilities

Undertake an audit of current industry training programmes and facilities to fill an identified knowledge gap allowing any opportunities for collaboration with others to meet increasing demand.

8. 'Industry in Residence' programme

Create an 'Industry in Residence' programme structure and identify a lead academic partner to undertake a pilot programme to explore ways in which we can deepen partnership working between industry, colleges and universities to ensure that course content reflects offshore wind industry requirements.

9. Competency routes for priority occupations

Identify gaps in competency routes for priority occupations and assess where apprenticeship pathways, modular learning or short-term upskilling solutions could be developed. This will map where skills shortages exist to build an evidence base that can inform the development of future training and apprenticeship solutions.

10. Diversity and inclusion

Set out advice on how best to implement the soon to be published OWIC *Best Practice Guide on Diversity and Inclusion* in a Scottish context, identifying practical ways the industry can tackle underrepresentation and attract a broader range of people that better reflects Scotland's population.

11. Internship and work-based opportunities

Determine a model for increasing the number of internship and work-based opportunities in the offshore wind sector to expand access to high-quality, practical experience that supports entry into offshore wind careers.

12. Additional opportunities for those in maritime industries

Undertake an analysis to determine the demand for targeted training to support marine users to access additional offshore wind opportunities. If there is demand, this will ensure there is provision to support those working in maritime industries who wish to cross-skill to access additional employment opportunities created by the offshore wind sector.

Environment and Planning, Data and Route to Market

Purpose and goals

The Environment and Planning, Data and Route to Market group coordinates action to deliver an effective enabling environment for the sustainable delivery of offshore wind in Scotland. The group works collaboratively across industry, government and wider stakeholders to develop plans, policy, regulatory frameworks, guidance and supporting evidence to address environmental and economic challenges facing offshore wind deployment and streamline the planning and consenting process. This helps provide confidence to investors and unlocks the benefits from offshore wind deployment for Scotland's citizens, economy and environment.

It is chaired by Colin Palmer of Scottish Renewables, supported by deputy chair Alice Tirbooman also from Scottish Renewables.



A coordinated approach is needed for Scotland to speed up efforts to reach net zero. Our ongoing work with key industry developers, government and stakeholder groups identifies the best route for all to drive forward consent of offshore wind projects. This year there has been significant consultation on key policy areas, in particular the Sectoral Marine Plan, to ensure that the sector has been well represented in all decisions that affect it.

**COLIN PALMER, CHAIR,
DIRECTOR OF OFFSHORE,
SCOTTISH RENEWABLES**



2025 progress

Sectoral Marine Plan for Offshore Wind Energy

The Sectoral Marine Plan provides the spatial planning framework for the ScotWind and INTOG leasing rounds and will be a critical milestone in driving forward Scotland's offshore wind development pipeline. The group undertook significant work to ensure that industry's views were represented throughout the consultation process as well as engaging as part of the task and finish group.

Ornithological impacts

As part of the ongoing work on strategic compensation, SOWEC published a report on the application of precaution in ornithology impact assessments, which examined the effectiveness of current approaches to assessing the potential impact of offshore wind developments on seabird populations.

The Application of precaution in ornithology impact assessments for offshore wind project applications: Evaluation of current approaches report concluded that the current recommendation to apply the precautionary principle to inputs when calculating impacts on seabirds can make these predicted impacts higher than they are ever likely to be in reality and, in some cases, biologically implausible.

It called for a review of the current processes and recommended that precaution should be applied to the outputs rather than individual inputs of ornithology EIAs.

Resource and processes

Ensuring sufficient allocation of resources and implementation of efficient processes across the public and private sector is essential for a high performing consenting system that will drive forward project development responsibly but at pace. Alongside the Developers Group, members have worked with NatureScot to facilitate the creation of a working group and a task and finish group on cost recovery.

Sector representation in consultations

The group has coordinated sector responses to a range of consultations on issues critical to the development and deployment of offshore wind:

- ◆ National Marine Plan 2 (NMP2) Planning Position Statement (PPS)
- ◆ Scottish Seabird Conservation Action Plan
- ◆ Draft Environmental Assessments for updated Sectoral Marine Plan for Offshore Wind Energy (SMP-OWE)
- ◆ Nature Positive Policy Draft SEA
- ◆ Draft plan-level social & economic impact assessment (SEIA) + Sustainability appraisal report (SA) for updated SMP-OWE
- ◆ Seabird Strategic Compensation Call for Input
- ◆ Building the North Sea's energy future
- ◆ Draft Strategic Environmental Assessment (SEA) report
- ◆ Offshore wind: setting up the Marine Recovery Fund
- ◆ Draft updated SMP-OWE
- ◆ Update to the 2020 Offshore Wind Policy Statement: Scotland's Offshore Wind Ambition
- ◆ Scottish Marine Recovery Fund
- ◆ UK Marine Strategy Part One Update 2025
- ◆ Marine and Coastal Restoration Plan
- ◆ Strategic Compensation Policy for Offshore Wind
- ◆ Consultation on Offshore Wind Environmental Compensatory Measures Reforms

Facilitating collaboration and conversation

The group has acted as a forum for coordination and collaboration between the public sector and industry supported by the Scottish Government. The quarterly meetings have been an invaluable forum for bringing together various stakeholders for discussion and agreement of actionable next steps.

Members of the group also regularly feed into other forums including the OWIC Pathways to Growth Group to ensure strong representation for Scotland's offshore wind sector.

OSPAR underwater noise thresholds

A meeting was held bringing together key government stakeholders to explore how potential OSPAR underwater noise thresholds could be absorbed and reflected in UK and Scottish marine policy. Outcomes of the meeting were reported back for further consideration.

Forward look

The Sectoral Marine Plan is due to be published in 2026 with further work then being undertaken to analyse practical implications for developers and other stakeholders. The process has been significantly collaborative, bringing together the sector and Scottish Government through multiple avenues including several of SOWEC's working groups.

Further engagement is also expected on the National Marine Plan 2.

In addition, the group will continue working with the Scottish Government on next steps regarding the recommendations of the *Application of precaution in ornithology impact assessments for offshore wind project applications* report.



Communities and Stakeholders

The Environment and Planning, Data and Route to Market group also oversees the Communities and Stakeholders workplan which focuses on supporting positive engagement with non-sector stakeholders and communicating the benefits of offshore wind.

This theme is chaired by Colin Palmer of Scottish Renewables, supported by deputy chair Maggie Olson-Jow also from Scottish Renewables.

2025 progress

Interactions with fishing industry

Effective and harmonious coexistence with other marine users is critical to the sustainable development of the offshore wind industry. Work undertaken to engage with commercial fisheries includes a workshop coordinated with the Scottish Government and attended by the Scottish Fishermen's Federation to discuss topics including the development of floating offshore wind, a potential legal backstop for disruption payments and the potential creation of a strategic fund.

Community benefits

Community benefits arrangements are intended to deliver sustainable, meaningful impacts and help support a just and fair transition to net zero. The Communities and Stakeholders group worked closely with the Developers Group to provide a response to the Scottish Government consultation on Good Practice Principles in relation to community benefits.

Wider activity on community benefits was supported through workshop attendance and ongoing engagement with the Scottish and UK Governments. A community benefits working group was created in conjunction with the Developers Group to help establish a cohesive industry position.

Telling Scotland's offshore wind story

Promoting SOWEC's work to the wider industry and celebrating the vital contribution offshore wind makes to the clean energy transition helps raise awareness and understanding, and secure advocacy. Ongoing communications activity does so through SOWEC's [website](#) and [LinkedIn](#) community as well as media outlets.

We closed out 2025 with a community of nearly 3,850 followers on LinkedIn and an 8.7% engagement rate, significantly ahead of the platform average.

The website continues to attract growing numbers of visitors with our average engagement rate and time on site also increasing as we continue to publish more outputs and publications produced by SOWEC throughout the year.

To connect and stay updated on our work simply scan the QR code on the back cover.

Forward look

Engagement with the fishing sector will continue to be a major focus to progress what have been useful discussions into action.

The Scottish Government published draft Good Practice Principles regarding community benefits in February, and the group will support the gathering of sector feedback on these to inform the publication of final guidance.

Celebrating industry progress

The offshore wind sector has seen significant progress in 2025, from planning applications and consents to major investment in the supply chain and infrastructure.

JANUARY

- Inch Cape Offshore Wind Farm secures financial close on £3.5bn funding package
- The Clean Energy Cluster launches at Scottish Renewables Offshore Wind Conference
- SSEN Transmission agrees supply and installation of a second 525kV HVDC cable link between Shetland and Scottish mainland with Sumitomo

FEBRUARY

- £5m HIE grant awarded to Scapa Deep Water Quay in Orkney
- Flotation Energy and Vårgrønn submit offshore consent application for Cenos Offshore Windfarm

MARCH

- Scottish Enterprise announces £3.2m funding for Port of Montrose via Scottish Government's £500m investment commitment
- Port of Cromarty Firth secures £55m FLOWMIS grant funding
- HIE approves up to £10m investment for Port of Nigg's Inner East Quay, part of Scottish Government's £500m funding for offshore wind

SEPTEMBER

- Cerulean Winds submits offshore consent application for Aspen Floating Offshore Wind Project
- Scottish Government awards £8.5m from Just Transition Fund to four infrastructure and supply chain projects from Maritime Developments, ORE Catapult, Fraserburgh Harbour and Verlume

AUGUST

- HIE approves £1.175m for Dales Voe dredging works via Scottish Government's £500m offshore wind funding commitment
- Buchan Offshore Wind submits offshore consent application
- Eyemouth Harbour Trust unveils plans for £250m deepwater harbour

APRIL

- Moray West Offshore Wind Farm energised and fully operational
- Prime Minister brings forward £300m for Great British Energy to invest in offshore wind supply chains

MAY

- OWIC and The Crown Estate publish Regional Growth Prospectuses
- New analysis by Fraser of Allander Institute and Scottish Renewables reveals offshore wind supported 19,580 FTE roles and economic output worth £6.8bn in 2022

OCTOBER

- Inch Cape Offshore Wind Farm successfully installs first of two 85km offshore export cables
- Buchan Offshore Wind submits onshore consent application for grid connection infrastructure
- Offshore Wind Growth Partnership launches Industrial Growth Fund offering up to £25m funding per supply chain project

NOVEMBER

- Scottish Government publishes its *Offshore Wind Skills Priorities and Action Plan*
- Pentland Floating Offshore Wind Farm secures £150m investment from Great British Energy, National Wealth Fund and Scottish National Investment Bank

JUNE

- HIE announces £24m funding for Kishorn Port dry dock and land reclamation
- £400m investment for the UK offshore wind supply chain confirmed by The Crown Estate
- Onshore planning consent granted to floating project Muir Mhòr Offshore Wind Farm
- West of Orkney Windfarm becomes first fully consented ScotWind project
- UK Government, Great British Energy, The Crown Estate and industry announce £1bn offshore wind supply chain deal for renewing industrial heartlands including Scotland

DECEMBER

- Qair submits offshore consent application for Ayre Offshore Wind Farm
- SOWEC *Application of precaution in ornithology impact assessments for offshore wind project applications* report published

Project Management Office Report

A refreshed approach

Following last year's independent review of SOWEC's role, commissioned by Scottish Government and Scottish Renewables, the PMO has supported the development of refreshed workplans for our realigned groups and strengthened the tracking of delivery, enabling clearer articulation of where SOWEC can influence outcomes and demonstrate impact.

A new communications strategy has also been developed to improve visibility and consistency of messaging across the sector.

As we move into the next phase, we are continuing to reflect on how SOWEC's structures, workplans and information flows can be aligned to support delivery effectively and ensure effort is focused where it adds most value.

Building collaboration

Reflecting the increasingly collaborative approach taken across SOWEC this year, we have been meeting regularly with OWIC to ensure joined-up thinking and alignment of priorities. This enables us to focus efforts and resources where they are best placed while ensuring strong representation for the Scottish sector within UK initiatives.

Funding effective projects

The SOWEC Treasury is stewarded by the PMO and funded by Scottish offshore wind developers to facilitate key projects which will provide sector-wide benefits. Projects supported this year include:

- ◆ *The Application of precaution in ornithology impact assessments for offshore wind project applications: Evaluation of current approaches* report which was published in November and provides invaluable recommendations on how ornithological impacts should be assessed
- ◆ *Guide to a Fixed Offshore Wind Farm* – providing accessible insight into project development stages and supply chain opportunities

Acknowledgements

Thank you to all members of the PMO, current and previous, for their commitment and time over the past year.

In particular, thank you to Ben Miller, Gillian Morrison, Lauren Roberts and Annabel Roberts for their contribution during their time supporting SOWEC activity.

Special thanks to Marta Bera for her dedicated one-year project to reset and restructure the SOWEC workplan and reporting framework. Her work has significantly strengthened our ability to measure impact, clarify where SOWEC can influence outcomes, and capture the scale of collective influence. We wish her well as she concludes her time with the PMO at the end of March 2026.

We also extend thanks to Katrine Pearson and the 3x1 team, whose work has substantially improved the visibility and communication of SOWEC's activities across the sector.

**LYNSEY SHOVLIN, PMO LEAD,
OFFSHORE WIND DEVELOPMENT MANAGER
(ENABLING), CROWN ESTATE SCOTLAND**







SOWEC

Scottish Offshore Wind Energy Council

SOWEC is a partnership between the Scottish public sector and industry to create a world-class offshore wind sector in Scotland



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