

# **Update to the 2020 Offshore Wind Policy Statement: Scotland's Offshore Wind Ambition – Consultation Analysis**

January 2026

# 1. Introduction

In 2020 the Scottish Government published the [Offshore Wind Policy Statement](#) (OWPS), which established a 8-11GW offshore wind capacity ambition by 2030. Given the significant increase in the number of potential offshore wind developments demonstrated through the ScotWind and the Innovation and Targeted Oil and Gas (INTOG) leasing rounds since 2020, a consultation was undertaken between 18 June and 13 August 2025 seeking views on updating the policy ambition to up to 40GW of new offshore wind energy by 2035-2040.

This consultation has informed the development of an Updated Offshore Wind Policy Statement (UOWPS), which sets out an updated offshore wind policy ambition for Scotland.

The consultation asked two questions:

1. Does “up to 40GW of new offshore wind by 2035-2040” demonstrate an appropriate level of ambition for the Scottish Government? Please explain your views.
2. What additional actions do you believe should be taken by the Scottish Government, UK Government and agencies in order to realise the full potential of Scotland’s offshore wind sector?

We received 80 responses, with the following respondent profile:

Type of respondent	Number
<b>Organisations:</b>	<b>43</b>
Local Authority	3
Consultancy, research, or lobbying organisation (including third sector and think tanks)	13
Energy developer including membership bodies	18
Public body	7
Political parties	1
Ports	1
<b>Individuals</b>	<b>36</b>
<b>All respondents</b>	<b>79<sup>1</sup></b>

Responses can be found on the Scottish Government’s website (where permission for publication was granted). As this sample is made up of self-selecting participants who may have a particular interest in offshore wind development, it is not representative of wider public opinion.

This report presents findings from a thematic analysis of responses submitted to this consultation. The analysis was undertaken by the Scottish Government. Qualitative analysis does not permit the quantification of themes. However, we have developed the following framework to indicate which themes are the most prevalent across the data, where:

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<sup>1</sup> One respondent submitted two separate responses, meaning 80 responses were received from 79 respondents.

- 'Prevalent', 'many' or 'many responses' – denotes the majority of the views expressed in the data.
- 'Several' or 'several responses' – denotes views that re-occurred frequently throughout the data, though not often enough to be considered prevalent.
- 'Some' or 'some responses' – denotes views that appeared occasionally in the data.
- 'A few' or 'a few responses' – denotes views expressed by three or fewer responses and is a minor theme.

## 2. Appropriateness of Ambition

This section presents an analysis of responses to question one of the consultation:

**Does “up to 40GW of new offshore wind by 2035-2040” demonstrate an appropriate level of ambition for the Scottish Government? Please explain your views.**

Just over half of the responses (40 – 11 individuals and 29 organisations) felt the proposed ambition was appropriate, while 38 of the responses (25 individuals and 13 organisations) felt it was not appropriate. Two responses did not comment on the appropriateness of the ambition. This demonstrates that organisations were more likely to support an increase of the Scottish Government’s offshore wind ambition, while individuals were less likely to support it.

### Ambition is Appropriate

This section explores the themes from the 40 responses (11 individuals and 29 organisations) which noted “up to 40GW of new offshore wind by 2035-2040” was an appropriate level of ambition for offshore wind.

Many responses were supportive of the increased ambition, with some organisational responses noting that it signals the Scottish Government’s **long-term commitment to offshore wind** and potential **economic benefits**:

- A few organisational responses welcomed the ambition for its strong signalling to investors.
- Some organisational responses noted that offshore wind development would bring opportunities for Scotland’s workforce and strengthen Scotland’s supply chain and infrastructure.
- Some organisational responses noted that companies require a steady pipeline of projects to enable them to grow and secure sustained investment, skills development, and jobs across the offshore wind lifecycle.
- A few responses from one organisation and two individuals noted that the gigawatt ambition should be higher.

Many responses noted the **importance of mitigations to ensure Scotland’s community, companies, and environment benefit** from an increase in offshore wind, alongside a desire for more detail to be set out on how Scotland as a society may benefit from increased offshore wind capacity. These responses:

- Questioned how increased revenue from offshore wind will be distributed e.g. through local authorities or public wealth funds; the form that the offshore wind benefits in Scotland would take and how it would be distributed – e.g. through an increase in revenue for Scotland or communities, or community benefits.
- Noted the detrimental effects offshore wind construction may have on the environment with regards to marine life and seabirds, as well as coastal erosion and flooding as infrastructure

is built out. They expressed a need for the environmental impact to be considered alongside any prospective increases to the ambition.

Many responses queried **how an increased ambition would be delivered**:

- Many responses raised questions on infrastructure challenges such as grid connections, planning and consenting, the financing of projects, curtailment, and addressing the skills shortage.
- Some organisational responses noted the growth of the supply chain would require strategic management to prevent bottlenecks.
- Some organisational responses stressed the need for alignment with wider UK Government policies and that of non-departmental public bodies such as the National Energy System Operator (NESO) to ensure the ambition can be delivered.
- A few organisational responses emphasised the need to ensure that the Scottish Government's offshore wind ambition is aligned to the UK Government's net zero targets and those for nature recovery.
- Many organisational responses also noted that without clear and credible plans in place to mitigate against delivery challenges, there was a risk that the ambition would not be met. Across these responses, there was a more generalised view that the ambition alone is insufficient and that a whole systems approach is needed to deliver on this ambition.
- Several individual responses who were otherwise supportive of the ambition suggested that the Scottish Government lacks a coherent plan to deliver its ambition.
- A few responses noted that challenges of upscaling the supply chain and developing infrastructure would also impact the Scottish Government's ability to achieve the up to 40GW ambition being consulted on. In particular, they referenced the significant investment required in the supply chain and ports to enable this level of offshore wind deployment and questioned whether it was in excess of Scotland's energy needs.

Finally, many organisational responses **questioned how the proposed ambition was articulated**:

- Many felt presenting a range of dates and an ambition of "up to" created more ambiguity on timescales to deliver projects. To send a clearer route to market they proposed the term "up to" should be removed and one target year set.
- A few felt the retention of intermediate goals – such as 11GW by 2030 – is important to allow the ambition to be reviewed, and for making it more credible and actionable.

## Ambition is not Appropriate

This section explores the themes from the 38 responses (25 individuals and 13 organisations) which suggested that "up to 40GW of new offshore wind by 2035-2040" was not an appropriate level of ambition for offshore wind.

Many responses expressed **uncertainty and scepticism concerning how communities and the environment were to benefit from offshore wind developments**, with a strong sense that offshore wind, along with the increased ambition, would negatively impact communities, other marine sectors, nature and the environment.

- Many responses – almost exclusively from individuals – expressed concerns that communities would not benefit financially from offshore wind with profits going to overseas companies or to the Scottish Government, and that increased development would negatively impact local communities.

- Many individual and some organisational responses noted that the ambition did not consider the detrimental impacts on the environment, marine life and seabirds.
- A few organisational responses suggested that an increased ambition would have detrimental effects on other marine users and industries.
- Some responses from individuals noted that to achieve the proposed ambition, significant additional infrastructure would be required that may adversely impact local communities.

Many responses **questioned the deliverability and credibility** of the ambition.

- Many organisational responses, and an individual response expressed doubt at fully delivering the ambition due to wider infrastructure constraints, and the possibility of misalignment with policies and targets across the UK.
- Several individual responses stated that the new ambition is in excess of Scotland's energy needs and would require significant infrastructure development to achieve.
- Some organisational responses noted setting an ambition without ensuring it can be aligned to the UK Government plans (like the Strategic Spatial Energy Plan) to enable delivery creates a risk of policy misalignment.
- A few responses, mostly from organisations, noted it would be challenging to grow the supply chain and ports infrastructure to the level required to achieve the ambition.
- A few organisational responses thought there was a need to provide specific support to the floating offshore wind sector.

### 3. Additional Actions

This section presents an analysis of responses to question two of the consultation:

**What additional actions do you believe should be taken by the Scottish Government, UK Government and agencies in order to realise the full potential of Scotland's offshore wind sector?**

Almost two thirds of responses (51 – 12 individuals and 39 organisations) suggested further action should be taken, while the remaining 28 responses (23 individuals and 5 organisations) noted that no further action should be taken. One response did not comment on what further action should be taken.

#### Further action required

This section covers the 51 responses (12 individuals and 39 organisations) that suggested further action should be taken in response to the proposal to increase the Scottish Government's offshore wind ambition:

Many responses highlighted the **importance of actions to reduce any impact on environment** associated with increasing the Scottish Government's offshore wind ambition:

- A few individual and several organisational responses expressed concern over the cumulative impacts of offshore wind farms on the environment. Actions identified suggested: only progressing the least carbon intensive projects, using locations and technology which cause minimal disruption to the environment, and using expertise in subsea engineering to develop solutions which minimise environmental impact.
- A few organisational responses noted that environmental compensation may be financially unviable and highlighting that the Sectoral Marine Plan for Offshore Wind Energy (SMP-

OWE) takes what is termed a “precautionary approach” towards environmental assessments which could impact the delivery of offshore wind.

- Some responses said the environmental impacts of offshore wind developments should be considered in more detail, with one organisational response noting inclusive decision making would make the development process more robust and transparent and contribute to feelings of shared ownership.
- A few organisational responses asked for more work to be undertaken on understanding the environmental effects offshore wind development has on the marine environment and sea birds, prior to ambitions being consulted on and further decisions being made about projects.

Some responses also suggested that associated **action should be taken to ensure that new developments directly benefit communities**:

- Some individual responses suggested local content should be used in offshore wind farms to ensure jobs, skills, and expertise remain in Scotland, and that Scotland should receive the revenue generated from offshore wind.
- Several organisational responses noted the importance of windfarms being community or nationally owned. This included suggestions that a portion of a windfarms’ profit should go to the local community, that public ownership should be a condition of lease, and to rebalance the ownership of offshore wind projects away from multinational private companies by creating a public energy company. The Scottish Government was also urged to work with the offshore wind sector to develop good practice for community benefits and shared ownership.

Many organisational responses and a few individual responses also called for **greater alignment of policy between the Scottish Government, the UK Government and agencies** such as NESO and Ofgem:

- It was noted, for example, that: the Transmission Network Use of Service (TNUoS) charges are causing uncertainties to projects and resolution of this issue requires collaboration across governments and agencies and suggested that the consenting process needs to be streamlined and departments better resourced to support offshore wind deployment.

No further action should be taken

This section covers the remaining 28 responses (23 individuals and 5 organisations) that suggested no further action should be taken in response to the proposal to increase the Scottish Government’s offshore wind ambition. Among these responses:

- Some individual responses **expressed concern that overseas investors would benefit more from offshore wind development than local communities**, therefore no further action should be taken to develop offshore wind.
- Two individual responses argued that **development should be stopped until the government has a clear strategy to deliver it**.

## 4. Conclusion

Although opinion was relatively evenly split, marginally more responses (40) indicated the consultation’s proposal to increase the Scottish Government’s offshore wind ambition to up to 40GW of new offshore wind energy by 2035-2040 was appropriate than not (38).

Many responses that were supportive of the proposed ambition noted that it signals the Scottish Government's long-term commitment to offshore wind and the potential for economic benefits. However, they also noted challenges to its delivery including policy and delivery alignment between the Scottish Government, the UK Government and agencies. Some responses questioned how the proposed ambition was articulated.

Many responses not in favour of the proposed ambition cited concerns including impacts on the environment, nature, and other marine users, and a lack of benefit to communities. They also questioned the deliverability and credibility of the ambition being consulted on, pointing to issues such as wider infrastructure constraints.

Common themes in responses that suggested additional actions should be taken largely related to better understanding and reducing the impact on the environment, ensuring that communities benefit directly from developments and the Scottish Government, the UK Government, and relevant agencies, working together to ensure policy alignment.

Where permission was received, the consultation responses have been published on the Scottish Government's website at <https://www.gov.scot/isbn/9781806436699>. Readers are encouraged to read the responses should they wish to understand in detail the variety of responses received.



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The Scottish Government  
St Andrew's House  
Edinburgh  
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ISBN: 978-1-80643-669-9 (web only)

Published by The Scottish Government, January 2026

Produced for The Scottish Government by APS Group Scotland, 21 Tennant Street, Edinburgh EH6 5NA  
PPDAS1697466 (01/26)

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