

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

January 2026

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## 1 – Ministerial foreword

### **Gillian Martin MSP, Cabinet Secretary for Climate Action and Energy**



Offshore wind presents an era-defining opportunity to grow our green economy for the benefit of communities across Scotland, while supporting our energy security and journey towards net zero.

Since the last [Offshore Wind Policy Statement](#) was published in 2020, much has changed.

Through our world-leading ScotWind and Innovation and Targeted Oil and Gas leasing rounds, Scotland has positioned itself at the forefront of offshore wind development globally with a potential project pipeline of over 40 GW – more than a third of the total UK pipeline (for projects that have reached the planning stage), which is one of the largest in the world.

Our [Green Industrial Strategy](#), published in 2024, recognises offshore wind as a priority opportunity area, where Scotland has globally competitive strengths and the potential to deliver transformational economic growth.

We are delivering a programme which has unlocked almost £900 million of investment so far to anchor our offshore wind supply chain and develop our offshore wind port infrastructure. In doing so, we are working to ensure the offshore wind opportunity in Scotland delivers economic growth, including jobs, and revitalises our coastal communities.

Now is the time to set out our offshore wind ambitions alongside our updated plans to ensure that communities and citizens reap the benefits of this approach.

## 2 – Scotland’s updated offshore wind ambition

In summer 2025, the Scottish Government consulted on a proposal to increase Scotland’s offshore wind ambition from 8–11 GW by 2030 (as set out in the 2020 policy statement) to up to 40 GW of new offshore wind by 2035–2040. The consultation sought views on whether this level of ambition was appropriate and received 80 responses from both individuals and organisations. A full analysis of responses is available [here](#).

Responses reflected a range of perspectives:

- **Supportive views** welcomed the higher ambition as a clear signal of long-term commitment, with potential to attract investment and accelerate sector growth.
- **Concerns raised** included impacts on the environment, nature, and other marine users, a potential lack of benefit to communities, and the deliverability of the scale of ambition being consulted on.

In determining the updated ambition, the Scottish Government considered:

- Consultation feedback.
- The potential strategic benefits for Scotland.
- Measures to address concerns raised.
- The rapid growth in power demand expected over the 2030s and 2040s.

The following key strategic benefits for Scotland were identified:

- **Energy security:** Reducing reliance on volatile fossil fuel markets and strengthening UK energy independence which will protect businesses and families from increased energy bills.
- **Economic growth:** Unlocking private investment, building a world-class domestic supply chain, creating thousands of high-quality jobs, and revitalising coastal communities.
- **Just transition:** Offering people, businesses and communities an alternative energy industry to work in and be part of as we transition away from fossil fuels.
- **Climate action:** Accelerating progress towards net zero while meeting international commitments by increasing Scotland’s renewable energy generation.
- **Innovation leadership:** Pioneering floating wind technology and integrated energy solutions through the ScotWind and Innovation and Targeted Oil and Gas (INTOG) leasing rounds - positioning Scotland as a global hub for innovation.

**The Scottish Government is now resetting its offshore wind policy ambition to up to 40 GW of new offshore wind capacity by 2040**, in addition to the already operational or consented capacity (as of August 2025 when the consultation ended).

This updated ambition:

- Reaffirms our commitment to supporting the delivery of the existing project pipeline, including ScotWind and INTOG projects.
- Clarifies that no further offshore wind leasing rounds are planned in the near term.
- Establishes a clear and realistic timescale – 2040 – rather than 2035-2040.

We acknowledge the concerns from other marine users about the potential impacts of large-scale development on their sectors and the marine environment, and we remain firmly committed to sustainable, plan-led growth.

The Scottish Government is working to manage marine space in a way that safeguards environmental interests and supports all marine users, including our valued fishing sector, so that every sector can thrive. This principle underpins our ongoing update of the Sectoral Marine Plan for Offshore Wind Energy (SMP-OWE) and our efforts to deliver strategic compensation measures and establish a Scottish Marine Recovery Fund.

While we will do everything in our power to deliver on the updated ambition for offshore wind in Scotland, we are clear that deployment of the potential pipeline will always be subject to rigorous planning consents and project-level impact assessments.

Delivery also depends on the UK Government and its agencies playing their part in ensuring a supportive policy and investment environment including by delivering timely grid connections and upgrades, successful Contracts for Difference allocation rounds, and creating a level playing field for Scottish projects by addressing unfair transmission charges. Global market conditions will also remain a factor.

### 3 – Achieving the ambition: enabling sustainable deployment and realising wider benefits

A stable and supportive policy, regulatory and investment environment is essential to successfully deliver Scotland's offshore wind pipeline and unlock private investment in both projects and the wider infrastructure needed by the sector. While significant progress has been made since the publication of the 2020 Offshore Wind Policy Statement to create such an environment, further action is needed.

The consultation asked what additional actions should be taken by the Scottish Government, UK Government and agencies in order to realise the full potential of Scotland's offshore wind sector. A full analysis of responses is available [here](#). Common themes included:

- **Impact on the environment:** Actions to understand and minimise the environmental impact of offshore wind development.
- **Community benefit:** Actions to ensure communities benefit directly from offshore wind developments.
- **Collaboration between governments:** Actions to ensure policy alignment and coherence between the Scottish Government, the UK Government and agencies.

To respond to this, the Scottish Government will continue to take decisive action as set out below to create the conditions for success that unlock investment and accelerate deployment in a sustainable and fair way.

#### Planning and regulatory reform

A plan-led approach to offshore wind deployment, supported by strategic compensation measures and efficient licensing and consenting processes, is essential to provide certainty for developers and confidence for investors. This approach ensures meaningful engagement with key stakeholders at both strategic and individual project level, enabling responsible development that is sustainable, benefits the people of Scotland, and fully considers environmental impacts and the interests of other marine users.

We will:

- Publish an updated **SMP-OWE** setting out a sustainable roadmap for offshore wind development in Scottish waters that balances environmental, community, and economic needs.
- Set out in the **National Marine Plan 2** a framework for the sustainable development of Scotland's marine shared space, in line with our [Blue Economy vision](#) and our just transition principles.
- Work in partnership with the UK Government to leverage opportunities provided by the Energy Act 2023 to deliver ambitious policy and regulatory reforms, including **Habitat Regulations reform**, which will enable a more

flexible and pragmatic approach to environmental compensation and support positive investment in marine environmental outcomes.

- Establish a **Scottish Marine Recovery Fund** to deliver a more streamlined way of securing compensation for adverse environmental effects, developing a portfolio of compensatory measures accessible through the Fund or directly to offshore wind developers.
- Assess the cumulative impacts on fisheries, and **work with the fishing sector and offshore wind industry to develop practical solutions** to address short-term issues and explore options to support long-term resilience and co-existence.
- Continue to **streamline our licensing and consenting processes** and provide additional guidance based on feedback of what would be useful, supporting our commitment to deliver robust determinations within 9-12 months where possible (complex applications may take longer).

## Strategic investment in supply chain and ports infrastructure

We estimate that the potential global capital value of the Scottish offshore wind market could be around £100 billion, given full deployment of the potential pipeline. We are continuing to strategically invest in the offshore wind supply chain and ports infrastructure. To date, we have unlocked almost £900 million of investment – our own investment of almost £150 million is crowding in a further £70 million from UK public finance institutions and leveraging up to £670 million in private investment. Once fully completed, activity across these projects is expected to support up to 5,000 jobs in Scottish communities. This will continue to grow Scotland's already strong reputation as a destination for offshore wind investment.

We will:

- Continue to secure commitments from capital and inward investors through our **strategic investments**, targeting investment at critical ports infrastructure and supply chain projects, and leveraging wider public finance investment into projects in Scotland.
- Unlock opportunities and address **strategic challenges** to position Scottish ports as key enablers of offshore wind deployment and investment through an Offshore Wind Ports Short-Life Working Group.
- Provide **targeted support for the Scottish supply chain** through working with delivery partners, and maximise opportunities identified through Crown Estate Scotland's review of developer Supply Chain Development Statement updates.

## Supporting the development of a skilled workforce

It is essential that Scotland has the skilled workforce to deliver our ambition. One of the most significant opportunities associated with the growth of the offshore wind

sector is its ability to support well paid, secure and sustainable jobs for people across Scotland, including as part of a just transition.

The [Offshore Wind Skills Priorities & Action Plan](#), published by the Scottish Government in November 2025, was developed in partnership with industry, trade unions and key public sector partners to support the pipeline of skilled workers which will be needed by the sector. It establishes a common set of objectives, identifies priority job roles and sets out initial actions to be taken by industry and partners, building on work already underway.

We will:

- Establish a **dedicated Offshore Wind Skills Programme** with industry and partners to oversee delivery of the actions in the plan and coordinate future offshore wind skills interventions.
- Work with the UK Government and industry on the design and implementation of any **Clean Industry Bonus** skills-related reforms to ensure they recognise the devolved nature of skills in Scotland and the outsized demand for skilled workers in Scotland, given the size of our potential pipeline.

## Innovation, research and cost reduction

Floating offshore wind represents one of Scotland's greatest competitive advantages in the energy transition and makes up more than half of Scotland's potential offshore wind pipeline. Technological development, supply chain innovation, and continued research are key to advancing the sector, anchoring early domestic supply chain opportunities, and accelerating standardisation and cost reduction. With our extensive network of universities, research facilities and test and demonstration centres, Scotland has already become a global hub for floating offshore wind innovation.

We will:

- Build on the success of the Aberdeen-based **Floating Wind Innovation Centre**, the UK's primary facility dedicated to the advancement of floating technology innovation, including through the recent £500,000 commitment of Just Transition Funding to support the development of a large-scale synthetic mooring line test rig.
- Develop new market clusters as vehicles for high-growth, innovation-driven economies as set out in [Scotland's National Innovation Strategy](#). This includes support for the **Clean Energy Cluster** which aims to foster innovation and boost the global competitiveness of the Scottish offshore wind supply chain through piloting a blueprint for a Scottish Cluster Scheme.

## Community benefits

Offshore wind offers a major opportunity to grow our local, regional, and national economies in a sustainable way, create high-quality green jobs, support a just transition, reinvigorate coastal towns, and deliver lasting benefits for communities.

The Scottish Government has led the way on community benefits underpinned by our Good Practice Principles for Community Benefits from Offshore Renewable Energy Developments. We encourage developers to offer community benefits and shared ownership opportunities as standard on all renewable energy projects so that they deliver long-lasting, tangible outcomes for Scotland's people and places. As the power to mandate community benefits from offshore renewables has not been devolved, all arrangements in Scotland are on a voluntary basis.

We will **update and improve our community benefits Good Practice Principles** later in 2026, to ensure they are as effective as possible in supporting communities and developers to implement schemes that maximise positive outcomes.

## Working with the UK Government

We continue to work closely with the UK Government and agencies on reserved matters which are key to realising our shared ambitions around clean power, and there has been positive progress.

The UK Government has committed to reforming the UK's electricity market arrangements through a reformed national pricing package, which will be underpinned by the [Strategic Spatial Energy Plan \(SSEP\)](#) for Great Britain. The transmission owners are delivering major upgrades to the electricity grid to ensure that the appropriate infrastructure is in place for renewable energy to enter the grid. At the same time, the National Energy Systems Operator (NESO) is reforming the connections queue process to ensure it is more efficient with better alignment to strategic ambitions.

Reforms to the Contracts for Difference (CfD) scheme ahead of Allocation Round 7 (AR7) were generally positive and included the introduction of a separate budget for floating offshore wind and a separate Scottish clearing price for fixed-bottom offshore wind. Whilst it is positive that two Scottish projects were successful in AR7, we need the UK Government to ensure a level playing field for our extensive project pipeline, and urgently address the unfair and disproportionate transmission charges which our projects continue to face. We will continue to urge the UK Government to bring measures and sufficient budgets to support the deployment of our strong eligible project pipeline through Allocation Round 8 and future rounds.

We also need urgent action on other critical issues which are reserved to the UK Government. A lack of certainty on network connection dates in the context of a delayed connections queue reform process, and the transmission charging regime which puts Scottish offshore wind projects at a commercial disadvantage, remain the most significant barriers to delivery.

To secure project delivery in Scotland we will **continue to work constructively with the UK Government and UK delivery partners** such as NESO and Ofgem on these and other key reserved matters, asking that:

- Future reforms to the **CfD scheme**, and budgets for Allocation Rounds, enable the timely deployment of both fixed-bottom and floating offshore wind projects in Scotland at scale.
- NESO works collaboratively with developers and transmission owners to support Scottish offshore wind projects, and those linked to supply chain projects vital to the sector, in **connecting to the grid** through the connections reform process to enable timely deployment.
- The reforms necessary to make **transmission charges** fairer for Scottish generators both in the short term as well as the longer term (as part of reformed national pricing) are prioritised so that there is finally a level playing field for Scottish offshore wind projects.
- Development of the **SSEP** recognises our significant offshore wind project pipeline, noting that many of these projects are already well developed, and that the SSEP aligns with the long-term allocation of grid capacity in the connections queue reform process.

## International Collaboration

Scotland is a global leader in offshore wind and our proactive, innovative and targeted approach to collaborating with other countries has resulted in delivery of significant inward investment into Scotland. For example, Japanese companies are investing hundreds of millions of pounds into Scotland's renewable energy sector, including Sumitomo, which is investing £350 million in a subsea cable factory - projected to support around 330 jobs over 10 years.

We also continue to make good progress in our offshore wind collaboration with Norway, Denmark and Ireland in particular, where we are progressing a number of mutually beneficial actions across supply chain, marine planning, data sharing and ports.

We will continue to work closely with the Scottish Government's international office network, Scottish Development International (SDI) and others to **explore opportunities to showcase Scotland's offshore wind sector** – and our approach to delivery – internationally, and to **engage with potential inward investors**.

## Whole system collaboration

We are taking a whole systems 'Team Scotland' approach to supporting the delivery of offshore wind. This involves Scottish Government working closely with key public sector partners such as Scotland's enterprise agencies, the Scottish National Investment Bank, Crown Estate Scotland and skills bodies to ensure we are all

taking collaborative action towards the same goals. We also collaborate closely with the UK Government, international partners and, of course, industry.

We engage with industry through the Scottish Offshore Wind Energy Council, the Offshore Wind Industry Council, and the Scottish Energy Advisory Board. This helps us understand both the opportunities and challenges facing industry in delivering the potential offshore wind project pipeline and to take action.

We will continue to adopt the **'Team Scotland' approach** to delivery, and to prioritise **engagement with industry and developers** in line with the aims of the [Green Industrial Strategy](#).

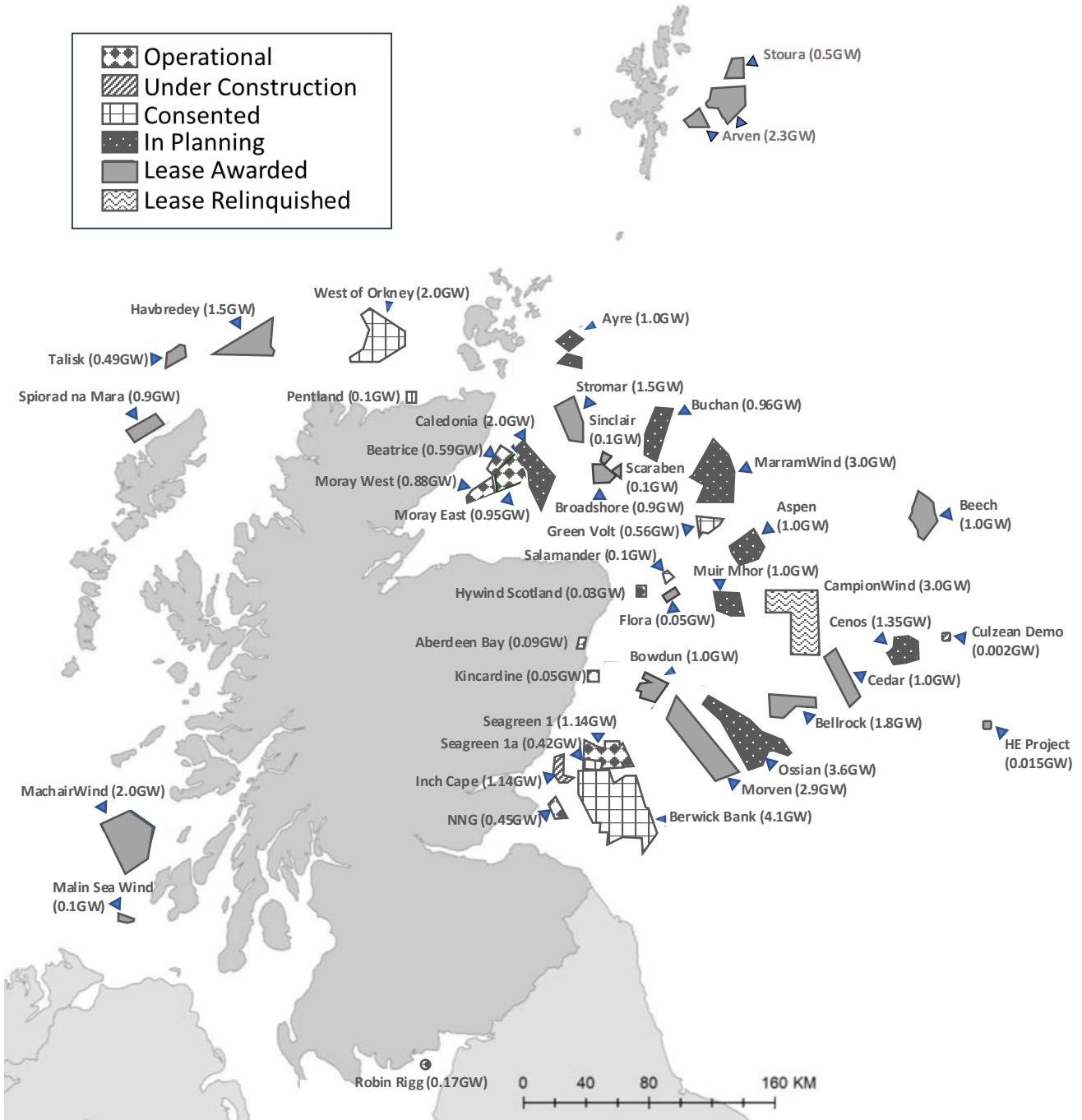
## Conclusion

While a lot of progress has clearly been made in establishing a stable and supportive policy, regulatory and investment environment to support the delivery of Scotland's offshore wind pipeline and unlock private investment, we are clear there is more to be done to realise our updated ambition.

This ambition reaffirms our commitment to scaling up our early offshore wind success by supporting the delivery of a substantial project pipeline and continues to build a world-class supply chain, while providing greater clarity around a delivery timescale.

Through robust planning, evidence-based decision-making, and collaboration across governments, sectors and countries, we can ensure offshore wind development in Scotland is both sustainable and inclusive, delivering the wider benefits we all want to see. We must collectively act now to ensure that Scotland seizes this era-defining opportunity to leave a positive, long-lasting legacy for future generations.

# Annex A: Map of all Scottish offshore wind projects (as of January 2026)



Operational				
Status	Site	Developer	Capacity	Leasing Round
	Aberdeen Bay	Vattenfall	93MW	Original Projects
	Beatrice	SSE/Red Rock Power	588MW	Original Projects
	Hywind Scotland	Equinor	30MW	Original Projects
	Kincardine FOW	KOWL	48MW	Original Projects
	Levenmouth	ORE Catapult	7MW	Original Projects
	Moray East	Ocean Winds/DGL/Equitix	950MW	Original Projects
	Moray West	Ocean Winds	882MW	Original Projects
	NNG	EDF Power Solutions and ESB	450MW	Original Projects
	Robin Rigg	RWE Renewables	174MW	Original Projects
	Seagreen 1	SSE Renewables/TotalEnergies	1075MW	Original Projects

Under Construction				
Status	Site	Developer	Capacity	Leasing Round
	Inch Cape	Red Rock Power, ESB	1080MW	Original Projects

Consented				
Status	Site	Developer	Capacity	Leasing Round
	Berwick Bank	SSE Renewables	4150MW	Original Projects
	Culzean Demo	TotalEnergies	3MW	INTOG Round
	Forthwind	Cierco	12MW	Original Projects
	Green Volt	Flotation Energy/Vargrønn	560MW	INTOG Round
	Pentland FOW	Copenhagen Infrastructure Partners	100MW	Original Projects
	Salamander	Odjfell Oceanwind/Simply Blue	100MW	INTOG Round
	Seagreen 1a	SSE Renewables	420MW	Original Projects
	West of Orkney	RIDG/Corio/TotalEnergies	2000MW	ScotWind Fixed

In Planning				
Status	Site	Developer	Capacity	
	Aspen	Cerulean Winds	1008MW	INTOG Round
	Ayre	Qair	1008MW	ScotWind Floating
	Buchan	Buchan Offshore Wind	960MW	ScotWind Floating
	Caledonia	Ocean Winds	2000MW	ScotWind Mixed
	Cenos	Flotation Energy/Vargrønn	1350MW	INTOG Round
	MarramWind	ScottishPower Renewables	3000MW	ScotWind Floating
	Muir Mhor	Vattenfall/Fred Olsen Seawind	1005MW	ScotWind Floating
	Ossian	SSE Renewables/CIP and Marubeni	3610MW	ScotWind Floating

Lease Awarded				
Status	Site	Developer	Capacity	Leasing Round
	Arven	Mainstream RP and Ocean Winds	2300MW	ScotWind Floating
	Beech	Cerulean Winds	1008MW	INTOG Round
	Bellrock	Nadara	1800MW	ScotWind Floating
	Bowdun	DEME and Aspiravi	1008MW	ScotWind Fixed
	Broadshore	Nadara	900MW	ScotWind Floating
	Cedar	Cerulean Winds	1008MW	INTOG Round
	Flora	BP Alternative Energy	50MW	INTOG Round
	Havbredey	Northland Power/ESB	1500MW	ScotWind Floating
	Judy	Harbour Energy	15MW	INTOG Round
	MachairWind	ScottishPower Renewables	2000MW	ScotWind Fixed
	Malin Sea Wind	ESB Asset Development	100MW	INTOG Round
	Morven	JERA Nex bp and EnBW	2907MW	ScotWind Fixed
	Scaraben	Nadara	100MW	INTOG Round
	Sinclair	Nadara	100MW	INTOG Round
	Spiorad na Mara	Northland Power/ESB	840MW	ScotWind Fixed
	Stoura	ESB Asset Management	500MW	ScotWind Floating
	Stromar	Orsted/BlueFloat Energy Nadara	1000MW	ScotWind Floating
	Talisk	Magnora Offshore Wind	495MW	ScotWind Floating

Lease Relinquished				
Status	Site	Developer	Capacity	Leasing Round
	CampionWind	Shell	3000MW	ScotWind Floating



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