UK wind at a delivery crossroads

The UK has been one of the defining wind markets in the world for more than two decades. From early onshore build-out across Scotland and Wales to the rise of giants such as Dogger Bank, Hornsea and Seagreen in the North Sea, wind has moved from challenger technology to the largest single source of UK electricity.

In 2025, wind remained the largest single source of electricity for the second consecutive year at 29.7% of total generation, ahead of gas at 26.8%.[1]

Having proven the technology and built a leading market position, UK wind is now entering a delivery phase defined by speed, coordination and execution. The Clean Power 2030 Action Plan sets out clear targets: 43 to 50 GW of offshore wind and 27 to 29 GW of onshore wind by 2030. The challenge now is delivery.[2]

A market returning to confidence

The mood in 2026 is meaningfully different to where it was 18 months ago. AR5 in 2023 produced no offshore wind bids. AR6 cleared, but barely. The cancellation of Ørsted's 2.4 GW Hornsea 4 in May 2025 confirmed what developers had been saying privately: the previous round had not solved the economics.[7]

AR7, announced on 14 January, has restored something closer to confidence. In total, 8.4 GW of capacity was awarded in the auction, a strong result compared to the 3.8 GW of fresh capacity awarded in AR6 and the previous record of 7.0 GW in AR4. Six fixed-bottom projects equivalent to 8.2 GW cleared the auction at a weighted average strike price of £90.91/MWh, with strike prices for fixed-bottom projects of £91.20/MWh in England and Wales and £89.49/MWh in Scotland after the introduction of a separate Scottish clearing price.[3, 4, 5]

The winners' list tells its own story. RWE was the big winner, picking up 6.9 GW of all capacity awarded, including Norfolk Vanguard


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East and West and a 3 GW share of Dogger Bank South.[4, 6] The selection of the Dogger Bank South farms is particularly interesting, as they are among the first major projects to benefit from revised CfD eligibility rules allowing some fixed-bottom offshore wind projects with pending consent applications to bid.[6, 14] Berwick Bank Phase B, the first 1.38 GW slice of SSE Renewables' Scottish scheme, also cleared.[6] Floating wind secured 192.5 MW across Blue Gem Wind's Erebus in the Celtic Sea and CIP's Pentland project off Caithness, but at this stage, even modest floating awards matter.[3, 6]

Two caveats sit alongside the positive read. EnBW's decision to withdraw from the 3 GW Mona / Morgan projects, announced shortly after the results of AR7 were known, is a reminder that pipeline visibility on paper is not the same as committed capital.[4] Even with the stronger AR7 result, reaching 43 to 50 GW of operational offshore wind by 2030 remains extremely challenging. The pathway now depends not only on awarded capacity, but on projects moving through consenting, financing, construction and grid connection on time.[2, 7]

The floating wind question

Floating wind remains the most distinctive part of the UK opportunity. ScotWind, awarded by Crown Estate Scotland, includes 14 floating projects representing close to 18 GW of potential capacity, one of the largest floating pipelines anywhere in the world. The Crown Estate's Celtic Sea round has added a further 4.5 GW of floating opportunity off South Wales and South West England.[12]

The pipeline is real. The route from leasing round to operational megawatt is not. ScotWind projects are still working through DEVEX-heavy front-end engineering, mooring and dynamic cable design and the supply chain conversations that determine whether construction is genuinely deliverable in the late 2020s and early 2030s.[12] The 192.5 MW awarded to floating wind projects in AR7 is another step towards commercial-scale floating wind deployment, but it is a step, not a leap.[3, 6]

Port readiness remains one of the most frequently cited constraints for floating wind delivery. Cromarty Firth, Port of Nigg, Ardersier and Port Talbot are all positioning for floating assembly work, but the capital programmes required to upgrade quaysides, water depths and laydown areas need a commitment horizon that today's auction visibility does not yet fully provide.[12] If the UK wants industrial leadership in floating wind, port investment decisions need to land in 2026 and 2027, not 2029.

Onshore wind: the quietly important story

Onshore wind tends to be eclipsed by offshore, which understates its importance. It remains one of the cheapest wind technologies in the UK, the fastest to build and the easiest to repower on existing sites.[13] The strike price for onshore wind was £72/MWh, a 2% increase compared to AR6, and AR7 delivered a record 6.2 GW across the onshore technologies: 4.9 GW of solar, 1.3 GW of onshore wind and 21 MW of tidal stream.[8]

The change in tone in England has helped. The de facto ban has gone, and developers including ScottishPower Renewables, RWE and Statkraft are actively scoping English sites again.[13] But community opposition, the Section 36 consenting process for larger Scottish schemes and competition for grid capacity with solar and battery storage all remain real friction.

Repowering will increasingly carry part of the load: the first generation of Scottish onshore sites are now reaching the point where smaller machines can be replaced with higher-capacity turbines on broadly similar footprints, often with existing grid agreements in place.[13]

The grid is the binding constraint

The real story of UK wind in 2026 is not auctions. It is connections. In January 2025, an estimated 770 GW of generation capacity was in the grid connection queue, totalling more than is needed to meet the country's net zero goals.[10] TMO4+, the 'first ready, first needed, first connected' reform led by NESO and approved by Ofgem in April 2025, is the most consequential structural change to the UK market in a generation.[9]

These new requirements have been applied to the existing connections queue, resulting in over 300 GW of excess generation and storage capacity being deprioritised.[11] The transmission queue is currently paused to new connection applications while NESO and the network operators issue revised connection offers.[11] For wind specifically, projects in flight need to evidence land rights, planning progress and CfD or other strategic alignment to retain their queue position. Projects that fail Gate 2 criteria can be moved to Gate 1 or removed.[9]

For developers, the reform is genuinely double-edged. Strategically aligned projects with CfDs, including the AR7 winners, gain queue priority and connection date confidence. Speculative or under-developed projects lose it. The next applications window opens in the second half of 2026.[9]

The transmission build itself remains the longer constraint. SSEN Transmission's Pathway to 2030 programme, National Grid Electricity Transmission's Great Grid Upgrade and SP Transmission's Eastern Green Link projects represent the largest onshore electricity infrastructure programme since the original grid build-out. None of it is fast.[18]

Supply chain and the export opportunity

The UK supply chain has depth in some segments and thin spots in others. Project development, marine operations, geotechnical and survey work, subsea engineering, ports, O&M services and digital asset management are all areas of genuine UK competence. JDR Cable Systems in Hartlepool, SeAH Wind's monopile facility at South Bank, Teesworks and the cluster of installation contractors in Aberdeen and Lowestoft are concrete examples of industrial capability.[15, 16]

The thinner areas remain large-scale turbine component manufacture, cable production capacity and installation vessel availability, although recent manufacturing announcements may change the picture over time. Vestas, for example, announced plans in March 2026 for a nacelle and hub factory in Scotland, subject to sufficient UK-based orders in AR7 and AR8.[17] Vessel availability for 2027 and 2028 remains an important area of market attention.


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The real test ahead

The UK wind story in 2026 is not one of momentum lost or momentum regained. It is more interesting than that. The auction works again. The pipeline is large. The connections regime is being rebuilt. Floating wind is moving from leasing to early construction. Onshore wind is back in play in England.

What the next two to three years will reveal is whether the system as a whole, auctions, consenting, connections, ports, vessels, transmission and skills, can move in step. The UK has been the world's reference market for offshore wind for 15 years. Whether it remains so will depend less on what is announced, and more on what is built.

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