



scottish
renewables

SCOTLAND'S RENEWABLE ENERGY INDUSTRY

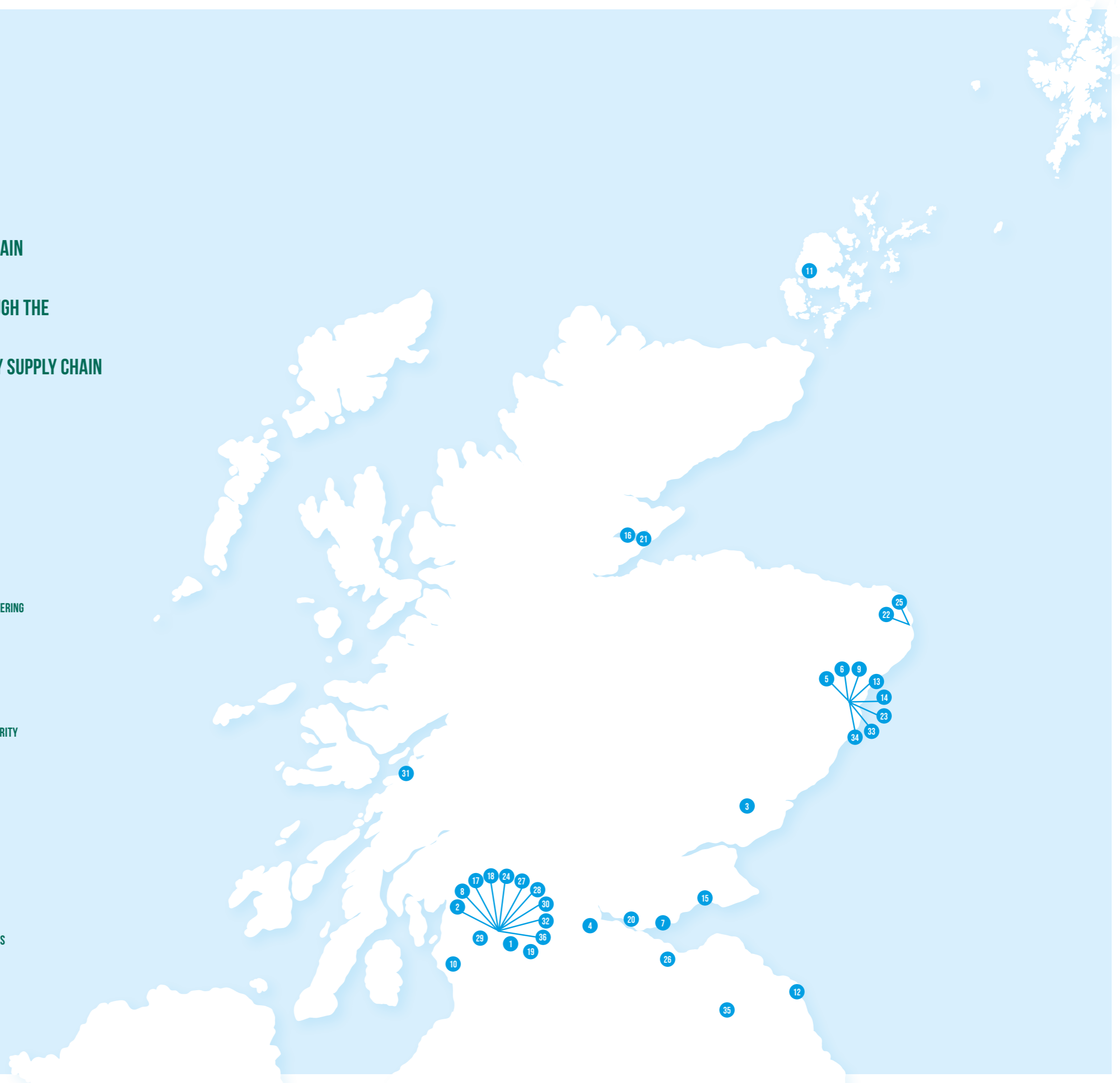
SUPPLY CHAIN IMPACT STATEMENT 2025/26



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Scotland has enormous potential to deliver a wealth of clean energy projects, backed by new transmission infrastructure. However, realising that potential depends on a diverse supply chain that needs to see a steady pipeline of projects so it can plan, invest and deliver.

Susie Lind
Chair of Scottish Renewables

Across wind, hydrogen, solar and marine energy projects, suppliers are expanding their skills, growing their teams and adapting to new challenges, from deeper waters and larger turbines to complex regulatory demands. Despite an uncertain project pipeline, these companies continue to innovate and evolve, playing a critical role in consenting, designing, building and operating the clean energy infrastructure that is powering homes and industries across the UK.

Recent policy and market developments from both the Scottish and UK governments have pointed to significant opportunities for suppliers but have also highlighted that proper progress hinges on pipeline certainty.

The Scottish Government has reset its offshore wind target to up to 40GW of capacity by 2040, reflecting its ambition for offshore wind and reinforcing Scotland's role as a global hub for offshore wind while providing a long-term market signal for supply chain investors.

Allocation Round 7 (AR7), which secured a record 8.4GW of offshore wind capacity and a further 1.4GW across onshore wind, is set to unlock major investment across the sector and will galvanise continued activity throughout the supply chain.

A landmark development is the UK Government's Clean Industry Bonus (CIB), a new supply chain investment mechanism linked to the Contracts for Difference (CfD) scheme. The CIB, which was first deployed in this year's CfD allocation round, is designed to incentivise investment in sustainable and domestic supply chains, including manufacturing facilities, ports and low-

carbon production processes in the UK to accelerate the delivery of offshore wind projects.

And while these announcements have been welcomed by industry they come at a time when suppliers are already securing investment, committing their own capital and developing the skills they will need to support future growth – such as Sumitomo's new cable facility at the Port of Nigg and the Montrose Skills Academy.

We've been calling for more test and demonstration projects in Scotland, so it was a real boost to see the Pentland Floating Offshore Wind Farm come through AR7. These developments will play a key role in providing the expertise required to deliver this technology on a commercial scale.

There's also growing momentum in Scotland around emerging renewables such as green hydrogen and marine energy. This is important not least because wave and tidal projects have a proud history of providing Scottish suppliers with the chance to try out new technology before introducing it to other sectors.

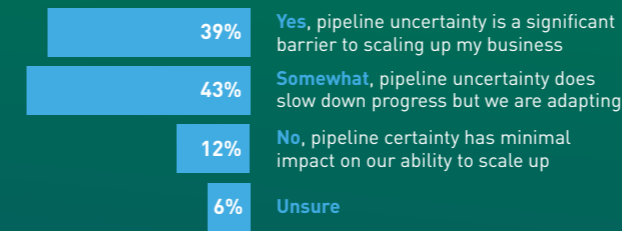
And so, the ambition of Scotland's renewable energy industry is clear. Now it's about making it happen, with a supply chain ready to deliver Scotland's next wave of green energy projects.



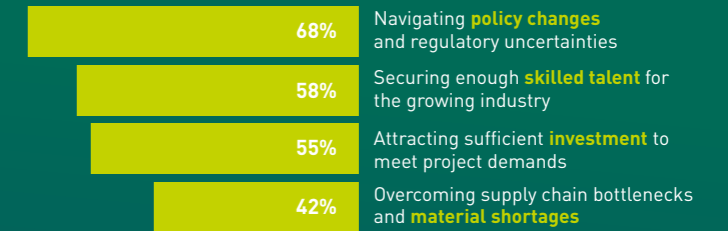
SUPPLY CHAIN INSIGHT

As part of this year's Supply Chain Impact Statement we asked suppliers how they think the renewable energy industry is performing in Scotland. Here's what they told us:

Is uncertainty in the renewable energy pipeline hindering your ability to scale up your business in the renewable energy industry?

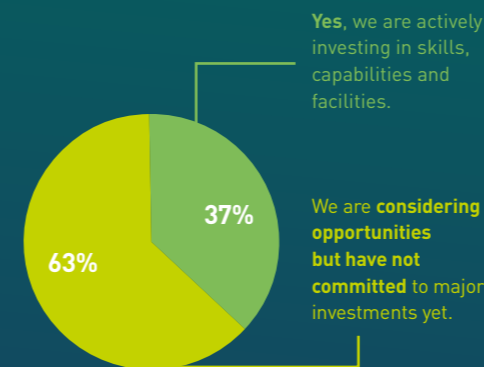


What do you think are the most pressing challenges for Scotland's renewable energy supply chain in 2026?

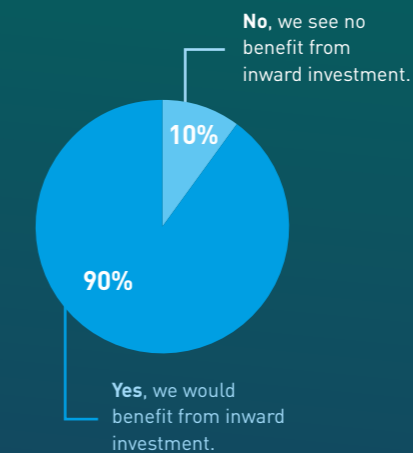


*Multiple response question

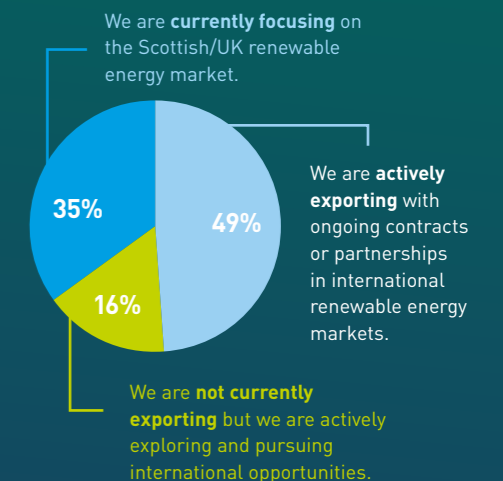
Is your business investing in skills, capabilities and facilities to capitalise on Scotland's renewable energy market over the next three to five years?



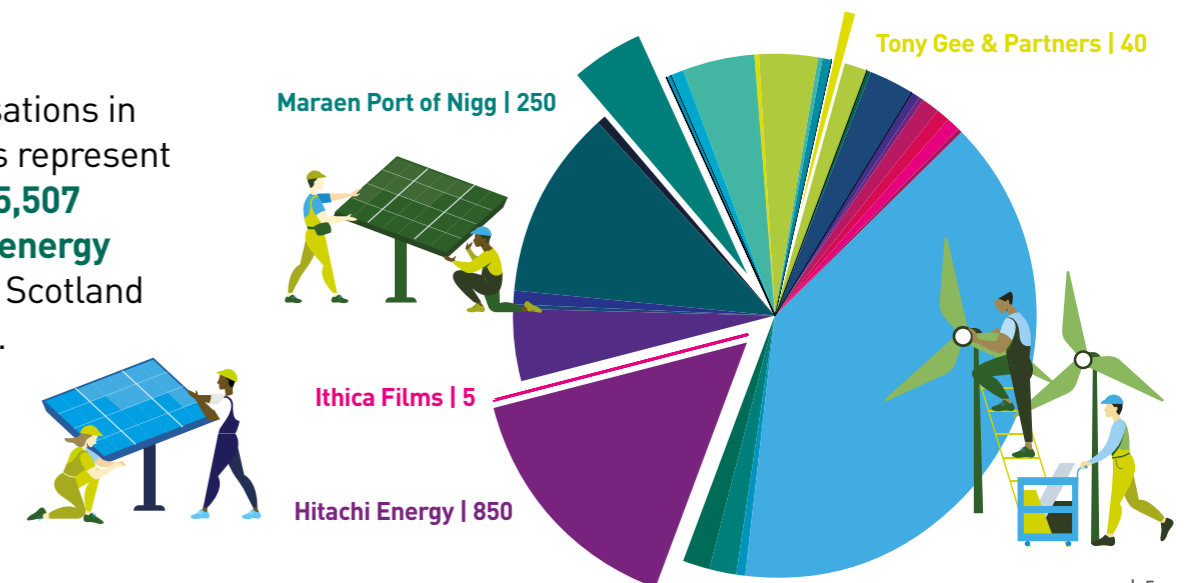
Would your business benefit from inward investment in Scotland, such as tier 1 manufacturers locating in the country?



To what extent is your business currently engaged in exporting goods, services, or expertise to international renewable energy markets?



The organisations in these pages represent **more than 5,507 renewable energy jobs** across Scotland and beyond.



SCOTLAND IS DELIVERING: NOW THE SUPPLY CHAIN NEEDS CERTAINTY TO GO FURTHER

Across Scotland, the offshore wind supply chain is delivering real value. From fabricators, port operators and safety specialists to technical services providers, businesses have invested in new facilities, expanded their workforces, entered new markets and developed the partnerships and capabilities required to compete for major offshore wind contracts.

Much of this has been achieved without the certainty that would normally underpin investment at this scale. Suppliers have committed capital, taken on risk and built capability in advance of confirmed demand, demonstrating both confidence in Scotland's offshore wind future and a determination to be part of it. Scotland's industrial ambitions for offshore wind are ready to be fully realised.

What must come next is action to create a dependable medium-term order book and clear long-term visibility of the pipeline that supports business growth. Complemented by coherent policy frameworks and the right funding methods, these actions will strengthen Scotland's competitiveness and give businesses across the supply chain the confidence to keep hiring, investing and winning work.

A PIPELINE THAT SUPPLIERS CAN SEE BUT CAN'T TOUCH

Open any sector publication and the numbers are striking. Scotland's ScotWind leasing round alone carries a market ambition of 28GW across 20 projects. Add the Innovation and Targeted Oil and Gas (INTOG) leasing round and a wider pipeline, Scotland is looking at its potential offshore wind capacity approaching 40GW. Developers have committed to an average spend of £1.5 billion per project, which, if delivered, represents one of the most significant industrial investments in Scottish history.

However, a more complicated picture emerges when speaking to businesses expected to support the delivery of this pipeline. Not a lack of ambition, nor a rejection of opportunity, but a growing concern about when and whether to invest.

This is a fundamental tension at the heart of Scotland's offshore wind supply chain story. The pipeline is visible, but for most suppliers, it remains out of reach. Projects slide from one year to the next. Consenting timelines are stretched. Grid connection timelines and delivery sequencing continue to create uncertainty. Final Investment Decisions (FIDs) – the trigger point that unlocks real procurement activity – are delayed as developers navigate an increasingly complex financial and regulatory landscape. This, alongside commercial confidentiality, can limit how much developers are able to share with the supply chain, even when there is a genuine intention to engage.

The result is a supply chain that is ready and willing but waiting for the orders that unlock investment. Scaling up a business takes significant time and capital, and suppliers cannot wait for a confirmed tender to begin that process. Without a clearer view of when projects will progress, the business case for investing in people, facilities and equipment is hard to make.

As part of this year's Supply Chain Impact Statement, Scottish Renewables surveyed its members on industry sentiment. 82% of respondents cited pipeline uncertainty as either a significant barrier to scaling up or a factor slowing their progress. This is consistent with what we regularly hear from members – that while the policy mechanisms and funding available to support businesses are welcome, what suppliers need most is greater pipeline certainty and a more dependable order book.

That said, developers are demonstrating how meaningful, proactive supply chain engagement can be achieved despite these constraints. This is the standard the whole industry should be working towards, and the conversation needs to move from why early engagement is difficult to why it should become the norm.

Amidst all of this, we should not lose sight of what the UK and Scottish policy landscape is already delivering. Public funding and investment vehicles are being actively deployed to build supply chain capability with Scotland's two Green Freeports proving their value in attracting the large-scale international investment that creates clusters of supply chain activity. The incentives they offer were instrumental in securing Sumitomo Electric's £350 million cable

manufacturing facility at the Maraen Port of Nigg, and that strategic investment is already generating contracts for Scottish businesses and drawing further investment to the site. These funding and policy frameworks are genuinely strengthening Scotland's competitive position. Their effectiveness is greatest, however, when aligned with a clear project pipeline. Public support can bridge the investment gap, but it is developer commitment that ultimately determines whether supply chain investment is sustained.

THE CHICKEN-AND-EGG PROBLEM INDUSTRY KEEPS CIRCLING

Developers need a capable and ready supply chain before they can commit confidently to procurement timelines. But suppliers need those orders before they can justify the investment required to build that capability. Breaking this cycle requires deliberate, coordinated action across industry and government – it will not resolve itself through market forces alone.

WHAT NEEDS TO HAPPEN NEXT?

There is no single solution or silver bullet. But based on what we hear consistently from our membership and the wider industry, Scottish Renewables believes the following steps are essential to unlocking Scotland's supply chain potential:

- **Earlier, structured engagement**
Engagement is needed not just at the procurement stage but years before projects reach FID. Programmes like Thistle Wind Partners' Supply Chain Pathways Programme, which connects suppliers directly with Tier 1 contractors ahead of tenders, offer a strong model for supply chain engagement. One that builds confidence, supports investment decisions and helps Scottish businesses become ready to compete for major contracts.
- **Collective demand signalling**
Developers should aggregate and share early-stage pipeline information, even when individual project commitments are not yet possible. Greater transparency about likely timescales, even pre-FID, can materially improve investment confidence across the supply chain.
- **Supply Chain Development Statements (SCDS) that go beyond intention**
Supply Chain Development Statements need to include clearer milestones, more transparent progress reporting and a genuine follow-through on commitments. The offshore wind sector should treat these not as a compliance exercise but as a process for meaningful accountability.
- **A stable Contracts for Difference framework**
Developers need a stable Contracts for Difference framework to give them confidence to reach FID. Until projects get there, supply chain engagement will remain constrained by uncertainty. Progress in allocation rounds is welcome, with the record-breaking Allocation Round 7 demonstrating what can be achieved but the appetite for continued reform must be sustained.
- **Continued public bridge mechanisms**
Support from Great British Energy, Scottish National Investment Bank, National Wealth Fund and enterprise agencies should help suppliers invest in capability ahead of confirmed demand. Where public bodies take equity positions alongside supply chain businesses, risk is shared and the investment cases are materially strengthened.
- **Long term signalling to 2050**
The Strategic Spatial Energy Plan will provide a clear view of energy system development out to 2050. This long-term visibility will send a strong signal to supply chain about intentions beyond 2030. It is important that these plans can be translated into component and regional level forecasts by the supply chain companies looking to invest in the UK.

The businesses featured in the pages of this document demonstrate that Scotland's supply chain has not only the capability and ambition but is already delivering one of the most ambitious energy programmes in the nation's history. The scale of what remains to be built requires developers, government and the wider industry to create the conditions in which that potential can be fully realised.

Greater pipeline visibility, earlier engagement, sustained public investment and a stable policy framework are the foundation on which Scotland's offshore wind supply chain will either consolidate its position or cede ground to competitors elsewhere. The opportunity is real and the capability is present. What is now required is the commitment, across all parts of the industry, to match that capability with the conditions it needs to flourish.

STRENGTHENING SCOTLAND'S ECONOMY THROUGH SUPPLY CHAIN DEVELOPMENT STATEMENTS

Crown Estate Scotland's Supply Chain Development Statement (SCDS) is a key process for aligning the expansion of offshore wind generation with growth in domestic supply chain capability across Scotland.



"Energy security is not only about megawatts – it's about the industries, skills and infrastructure that sustain them. The Supply Chain Development Statement helps lock that value into Scotland."

Gillian Morrison
Head of Offshore Wind Development, Crown Estate Scotland

What is an SCDS?

SCDSs are mandatory for every developer awarded an option agreement through the ScotWind and Innovation and Targeted Oil and Gas (INTOG) leasing rounds. They set out how a project will engage with Scottish suppliers, enable investment in ports and infrastructure, build manufacturing and installation capacity and secure operation bases across Scotland. All of which is underpinned by an increased workforce capability across the project lifecycle.

This is to ensure Scotland's offshore wind expansion delivers lasting economic value onshore, not just generation capacity offshore.

The story so far

Since being introduced, SCDSs have given one of the most comprehensive pictures of Scotland's offshore wind supply chain opportunity – from development and construction through to long-term operations and maintenance.

SCDS submissions are already informing the investment discussions between developers, ports and manufacturers, giving them earlier visibility of

committed project spend and greater confidence around timing, scale and key milestones. This is helping de-risk capital decisions in advance of final investment decisions. They are also bringing focus to the skills pipeline, supporting the workforce planning needed to meet the future demand for renewable energy deployment.

The scale and specificity of the data has helped shape wider interventions, such as the Strategic Investment Model (SIM), through clear, project-led evidence. This in turn has improved visibility of supply chain businesses actively seeking to invest and grow in Scotland. Together, these have supported a more targeted and confident approach to support intervention, helping ensure that commitments such as the Scottish Government's £500 million offshore wind supply chain programme are aligned with credible, deliverable demand.

What the 2026 data is telling us

Across more than 20 SCDS submissions, developers have committed an average of £1.5 billion expenditure per project, representing a significant and credible demand signal for the Scottish supply chain.

Several consistent insights are emerging. While the importance of port capacity and Scotland's offshore heritage is well understood, the data also highlights:

- **Timing is a key risk factor for delivery.**
Many supply chain bottlenecks are arising not from a lack of capability, but from misalignment between investment decisions and project delivery windows. Suppliers are being asked to commit capital before demand is certain.
- **Strong opportunities in integration, assembly and lifecycle services**
Scotland has a comparative advantage in complex system integration and long-term asset stewardship.
- **The growing importance of regional clusters**
Particularly for floating offshore wind, where proximity between ports, fabrication sites and operations and maintenance bases can materially reduce costs and delivery risk.

A stronger more transparent process

From 2026, Crown Estate Scotland is implementing a more structured approach to SCDS submissions to improve consistency, clarity and comparability.

The enhancements will:

- Improve consistency across submissions, allowing for clearer comparisons across projects and improving pipeline visibility.
- Strengthen the quality and clarity of information provided, including assumptions and delivery timelines.
- Support the verification and analysis of supply chain commitments, providing greater confidence in progress toward contracted positions.

To achieve this, the updated process includes:

- A standardised submission template.
- A more robust approach to the contracted position statement which will track progress as projects move toward lease and prepare for construction.
- A new interactive dashboard offering aggregated industry-level insights to support shared understanding, benchmarking, pipeline planning, evidence-based investment and policy decisions.



"Clear, comparable data can accelerate investment decisions and give suppliers earlier, stronger signals."

Lynsey Shovlin
Development Manager (Supply Chain),
Crown Estate Scotland

The strengthened SCDS has been designed to remain practical and proportionate. Where appropriate, it aligns with wider Scottish and UK reporting requirements to minimise duplication. Crown Estate Scotland is working closely with industry and government partners to ensure processes across the offshore wind sector reinforce each other, giving developers, investors and suppliers clearer signals and greater confidence to invest, while keeping the process efficient and focused on delivery.

Supporting Scotland's energy security

Scotland is entering the delivery phase of one of the world's largest offshore wind pipelines, and there is a finite window for the supply chain to secure its place in both domestic and global markets. This shift to full industrial deployment requires supply chain investment to materialise if Scotland is to capture the full economic opportunity offered by the move to an energy system dominated by renewable energy.

The SCDS complements a wider suite of supply chain functions to support offshore wind growth, including the development of port and manufacturing infrastructure, skills programmes and innovation funding. Crown Estate Scotland works with government, enterprise agencies, developers, industry bodies and the supply chain to help ensure SCDS commitments – and the assumptions underpinning them – translate into investment, jobs and capability across Scotland.

INVESTING IN SCOTLAND'S RENEWABLE ENERGY SUPPLY CHAIN

Scotland's renewable energy industry is attracting record levels of investment. But with funding flowing from multiple sources across Scottish and UK government bodies, enterprise agencies and private investors, it can be difficult to see the full picture. To illustrate the scale and the breadth of where capital is being deployed across the supply chain, here is an overview of all public investments committed since the ScotWind leasing round in 2022.

Scottish Government five-year supply chain commitment

£500 million
committed

Almost
£150 million
spent

Target to leverage
£1.5 billion
private investment

Scottish National Investment Bank

£700 million
invested from third parties

£200 million
spent across seven projects

Highlands and Islands Enterprise

More than
£70 million
committed since
January 2022

£40 million
invested as part of the Scottish
Government's £500 million
commitment

Scottish Enterprise

£27 million
committed since January 2022

Floating Offshore Wind Manufacturing Investment Scheme (FLOWMIS)

£55.7 million
secured by Port of Cromarty Firth

SPOTLIGHT

Pentland Floating Offshore Wind Farm

A first-of-its-kind public co-investment

Pentland is a landmark moment – the first time Great British Energy (GBE), Scottish National Investment Bank (SNIB) and National Wealth Fund (NWF) have co-invested together in a floating offshore wind project. By backing an early-stage floating wind project, these public institutions are helping to secure private investment and pipeline delivery. This will offer confidence to supply chain companies that will build new facilities and capabilities.

2025 and the £150 million backing by GBE, SNIB and NWF will support the delivery of more than 1,000 jobs through construction and operation. By enabling more projects like these, we can create demand for Scotland's ports, manufacturers, fabricators and service providers.



Floating offshore wind represents 60% of Scotland's potential energy pipeline – but without projects reaching financial close, supply chain investment struggles to follow. Pentland secured a Contracts for Difference in



OTHER NOTABLE INVESTMENTS BY PROJECT

Ardersier Energy Transition Facility

Port infrastructure

- 400-acre facility on the Inner Moray Firth
- Scotland's largest offshore wind port facility
- Potential for 3,000 jobs



* Quantum

Port of Nigg

Port infrastructure

- Prime location for manufacturing and assembly of offshore wind components
- Home to Sumitomo's £350 million cable factory



Kishorn Port

Port infrastructure

- Strategically important deep-water facility on the west coast.
- Showcased on the InvestScotland portal for global investors



Port of Aberdeen – South Harbour

Port infrastructure

- £420 million South Harbour expansion to support logistics and O&M activity



Sumitomo – HVDV Cable Facility

Inward Investment

- Japanese manufacturer Sumitomo Electric's £350 million subsea cable facility at Port of Nigg will be Sumitomo's first cable factory in Europe, boosting Scotland's manufacturing capacity



*Sumitomo

Subsea Micropiles

Innovation

- Innovative marine anchor system for floating offshore wind
- Plans to build a manufacturing facility in Scotland



*Marubeni-Itochu Steel

North Star Renewables – SOV Fleet

Vessels

- Building 40 hybrid Service Operations Vessels by 2040
- Aberdeen-based, 135-year track record.
- Addressing a critical vessel bottleneck in offshore wind O&M



*IFM / Edmond de Rothschild / RBC

Hitachi Energy – Centre of Excellence

Inward Investment

- New Engineering Centre of Excellence in Glasgow focused on energy transition technologies



*Hitachi Energy

Verlume – Subsea Energy Storage

Energy Storage

- World-first subsea grid-forming battery system.
- JTF-funded prototype in 2025-26
- Addresses grid stability and curtailment in offshore energy



* JTF grant, ** Par Equity

Arnish Yard, Stornoway – Navantia UK

Port infrastructure

- Plant and equipment upgrades to handle larger offshore wind projects
- Workforce forecast to grow from 150 to 250, including 30 apprentices



Aurora Energy Services – Training Hubs

Training & Skills

- Expanding a UK-wide network of training hubs to reskill oil and gas workers



A PRACTICAL GUIDE TO THE INVESTMENT LANDSCAPE

Who the funders are, what they offer and how to access it.

Great British Energy (GBE)

UK's first publicly owned energy company

What: GBE's strategic priorities are focused on the expansion of local energy, public ownership of utility-scale onshore energy and investment to grow the deep-water offshore wind sector.

It also runs the £1 billion Energy, Engineered in the UK (EEUK) programme. As part of this programme, GBE is opening its £300 million Supply Chain Fund (Offshore Wind & Networks) which is designed to tackle urgent bottlenecks in key components such as blades, turbines, transmission cables and converter stations. The application window is open until December 2026 or until fully allocated. A further £700 million investment fund is due to launch in Summer 2026.

Offers:

- Capital grants
- Manufacturing capacity
- Co-investment

Best for: Manufacturers of constrained components.

How: Apply via the online portal at gbe.gov.uk.



Highlands & Islands Enterprise (HIE)

Regional development agency for the Highlands & Islands energy company

What: HIE has championed economic development and innovation across the North of Scotland since 1965. Today, it is playing a major role in the delivery of the Scottish Government's offshore wind supply chain aspirations at key locations such as the Cromarty Firth. HIE also run the Green Grant Fund which SMEs can apply for £25,000 to £150,000 for up to 50% of project costs in energy efficiency and renewable energy. The application window is due to re-open in Spring 2026.

Offers:

- Capital grants
- Infrastructure
- Green grants

Best for: Businesses of all sizes in the Highlands & Islands.

How: Contact HIE directly or visit hie.co.uk.



National Wealth Fund (NWF)

UK Government's principal investor and policy bank

What: With £27.8 billion of capital, NWF offers a range of financing tools for capital-intensive infrastructure, supply chains and businesses across the UK to unlock economic opportunities on the clean energy transition. They focus on projects at late-stage development, construction or commercialisation and strategically target the offshore wind supply chain, ports, green hydrogen, carbon capture and storage, green steel and gigafactories.

Offers:

- Debt
- Equity
- Guarantees

Best for: Large infrastructure, ports, manufacturing at scale.

How: Apply via nationalwealthfund.org.uk – they work with co-investors including SNIB and GBE.



Offshore Wind Growth Partnership (OWGP)

OWIC funded flagship supply chain growth programme

What: The OWGP is the designated delivery body for the Offshore Wind Industrial Growth Plan (IGP). Funded privately by major offshore wind developers through the Offshore Wind Industry Council (OWIC), the OWGP manages a £100 million ten-year budget. It has supported more than 300 businesses since 2019 through grants and business development programmes. It is also linked to the Clean Industry Bonus (CIB) framework to strengthen the UK's domestic capabilities.

Offers:

- **Capital grants**
- **Development grants (up to £500,000)**
- **Business transformation**
- **Tender readiness**
- **Productivity programmes**

Best for: Supply chain companies at all stages, from capability building to major manufacturing investment. Open to companies already in offshore wind and those breaking in from other sectors.

How: Register at owgp.org.uk – competitive application process, match funding or in-kind contributions typically required. Watch for new funding call announcements.



Scottish Enterprise (SE)

Scotland's national economic development agency

What: Scottish Enterprise is Scotland's national economic development agency, helping ambitious businesses to innovate and scale. One of their strategic priorities is to create an internationally competitive renewable energy industry in Scotland. They deliver capital grants for supply chain infrastructure, research and development (R&D) support and innovation funding.

Key programmes include:

- **SMART:SCOTLAND:** up to £100,000 for early-stage feasibility studies for SMEs.
- **CAN DO Offshore Wind Innovation Fund:** £30,000-£50,000 grants for feasibility projects addressing industry-identified innovation priorities in offshore wind.
- **Clean Energy Transition Partnership (CETP):** €3.5 million transnational R&D programme across 30 countries, delivered on behalf of the Scottish Government.

Offers:

- **Capital grants**
- **R&D grants (£150,000 minimum)**
- **Feasibility grants**
- **Investor introductions**

Best for: SMEs, innovators and companies scaling up.

How: Visit scottish-enterprise.com to be assigned a free account manager.



South of Scotland Enterprise (SOSE)

Regional development agency for the South of Scotland

What: SOSE was established in 2020 to drive economic growth and increase the competitiveness of the South of Scotland region. It supports businesses throughout Dumfries & Galloway and the Scottish Borders with grants, business development support and access to investment. SOSE is working on the overarching themes aligned to the Scottish Government's National Strategy for Economic Transformation, including net-zero innovation.

Offers:

- **Business grants**
- **Growth support**
- **Sector and skills advice**

How: Visit southofscotlandenterprise.com – assign a business development manager.



UK Export Finance (UKEF)

UK Government's export credit agency

What: UKEF aims to benefit the UK economy by helping exporters of UK goods and services to win business overseas. In 2024-25, UKEF provided £14.5 billion of financial support to UK exporters across all sectors, including their Supply Chain Discount Guarantee which enables suppliers to get paid earlier by discounting invoices. or renewable energy projects, repayment terms of up to 22 years are available.

Offers:

- **Export guarantees**
- **Invoicing discounting**
- **Buyer financing**

How: Visit ukexportfinance.gov.uk – it works with your commercial bank to structure deals.



UK Research & Innovation (UKRI)

UK Government's research and innovation funder

What: Founded in 2018, UKRI supports the UK's research and innovation system with strategic themes centred around building a green future and creating opportunities that improve outcomes in communities across the country. UKRI has invested more than £1 billion in its Energy Programme and runs competitive innovation grants for renewable energy technologies.

Offers:

- **Innovation grants**
- **R&D funding**
- **Collaborative projects**

How: Visit ukri.org to view Innovate UK's funding finder.



Scottish National Investment Bank (SNIB)

Scotland's state-owned development bank

What: SNIB is Scotland's development bank which provides long-term public capital to businesses and projects that support its net-zero, place and innovation missions. It operates commercially and independently from the Scottish Government. Launched in 2020, it has already committed nearly £200 million across seven offshore wind projects with a further £700 million secured from third-party co-investors.

Offers:

- **Equity**
- **Long-term**
- **Transition finance**
- **Co-investment**

Best for: Scale-ups, manufacturers, infrastructure projects and companies transitioning from oil & gas.

How: Make an investment enquiry at thebank.scot – it has a dedicated energy transition team.



The Crown Estate

Manager of the UK's seabed and offshore wind leasing

What: The Crown Estate has committed up to £400 million to the UK's offshore wind supply chain, channelled through two programmes. Its £350 million Supply Chain Investment Programme focuses on port and supply chain infrastructure, delivered in partnership with Great British Energy and the National Wealth Fund. The second is the Supply Chain Accelerator, an early-stage development funding programme.

Offers:

- **Early-stage development grants (Supply Chain Accelerator)**
- **Large-scale infrastructure investment (Supply Chain Investment Programme)**

Best for: Supply chain businesses seeking early-stage funding to de-risk and develop projects ahead of larger investment rounds.

How: Applications for Round 3 of the Supply Chain Accelerator are open until July 3, 2026. Visit thecrownestate.co.uk to apply.



LOOKING FOR FUNDING?

Here's a practical route to access support

1 Start with your enterprise agency

Scottish Enterprise, Highlands & Islands Enterprise or South of Scotland Enterprise, depending on your location, can assign account managers, map you to the right funding and can facilitate warm introductions to SNIB, NWF and GBE. It's free and they know the landscape.

2 Use Find Business Support (findbusinesssupport.gov.scot)

The Scottish Government's one-stop portal listing all public grants, loans and support available – including smaller enterprise agency and local council grants that often go under the radar.

3 Register with Offshore Wind Growth Partnership

Even if there's no live funding call right now, registering at owgp.org.uk puts you on their radar and gives you access to their business transformation programmes, productivity support and advance notice of new grant rounds.

4 Join The Clean Energy Cluster

Membership gives access to supply chain intelligence, events, funding alerts and a supportive network.

5 Contact UKEF early for export ambitions

UK Export Finance can make your proposition more competitive internationally. They work with your bank and can be brought in at the contract-pursuit stage – not just after you've won.

INVESTMENT KEY INSIGHTS

Funders work together

GBE, SNIB, NWF, OWGP, SE and HIE have formally agreed to operate as a coordinated ecosystem. A conversation with one often unlocks doors to others – don't apply in isolation.

Match the fund to your stage

- Early-stage innovation – CAN DO and angel networks.
- Growth – SE R&D grants and OWGP development grants.
- Scale – SNIB and NWF.
- Manufacturers – GBE Supply Chain Fund.

Public funds crowd in private capital

A public grant or investment signals credibility to commercial lenders and private equity funds. Don't see public and private finance as alternatives – they're designed to work in sequence.

Fair Work matters

Almost all Scottish public funding now requires adherence to Fair Work principles – living wage, no exploitative contracts, employee voice. Build this into your application from the start.

Small grants exist too

HIE Green Grant Fund (£25k-£150k), CAN DO (£30k-£50k, 100% funded), SE SMART:SCOTLAND (up to £100k) – don't only chase the big numbers. Smaller grants build track record for larger asks.

DOCUMENT SPONSORS

Scottish Renewables would like to thank the following organisations for their continued support of the Supply Chain Impact Statement 2025/26.

Our sponsors are committed to strengthening the local supply chain, promoting collaboration and driving innovation. By playing a vital role in enhancing the performance and competitiveness of the renewable energy industry, our sponsors are helping to shape a sustainable future for Scotland.



CMS

CMS has an energy and climate change legal team, delivering cutting-edge expertise backed by an extensive international network. Its work enables billions of pounds of capital investment in projects and companies across the renewable energy industry. The team handles planning, projects, construction, finance as well as mergers, acquisitions, dispute prevention and resolution. CMS operates across key sectors:

- Transmission and regulated networks
- Onshore and offshore wind (with specific expertise in floating and deep-water wind)
- Biomass, biogas, solar, hydro, batteries and synchronous condensers
- Public sector energy efficiency initiatives and district heating
- Hydrogen and CCUS projects

- Innovative contracts for electricity supply
- Promotion of greater community investment.

CMS draws on expertise across its full-service offering and delivers integrated advice as a "one-stop shop".

It regularly publishes market-leading research and is committed to fostering inclusivity within its team and the wider industry.



EDF POWER SOLUTIONS UK AND IRELAND

EDF power solutions UK and Ireland, formerly EDF Renewables UK, is a renewable energy developer, with an expanding portfolio in onshore and offshore wind, battery storage and solar. In Scotland, a team of more than 230 people is delivering projects across onshore and offshore wind.

Its Scottish portfolio includes 11 onshore wind farms generating around 530MW of clean power, with a further 2GW in planning and development. Its flagship 450MW Neart na Gaoithe (NnG) wind farm became operational in 2025 with John Swinney MSP, First Minister of Scotland, marking the project's completion.



FRED. OLSEN RENEWABLES

Fred. Olsen Renewables is one of Scotland's longest standing renewable energy developers, with more than 30 years of experience delivering, owning and operating onshore wind projects.

Its portfolio spans around 805MW across the UK, Norway and Sweden, generating enough clean power for more than 698,000 homes.

With a pipeline exceeding 1GW, Fred. Olsen Renewables is advancing wind, solar and storage projects while prioritising community collaboration and local supply chain investment.



The operations and maintenance base at Eyemouth Harbour supports 27 employees – many from the local community – and will sustain 50 high-quality jobs, over the 25-year lifespan of the project.

Economic highlights from NnG:

- £1.8 billion invested in infrastructure
- £40 million invested by the Port of Dundee to create Scotland's first purpose-built offshore wind port
- £9 million invested in the Eyemouth O&M base, creating more than 50 high-skilled local jobs.



OCEAN WINDS

Ocean Winds, Scotland's largest offshore wind generator, has been driving significant supply chain investment in Scotland by supporting local suppliers and fostering industrial capability.

Ocean Winds' operations and maintenance (O&M) activities, anchored in Fraserburgh and Buckie, support more than 590 Scottish jobs. It is proud to be supporting transition in the economy, with its operations contracting 136 Scottish companies for O&M activities.

Each direct job at its O&M bases supports an additional 12 in the wider supply chain.



Its upcoming Caledonia project is committed to growing this supply chain investment and is working with partners to ensure the skills are ready, with programmes such as the Fabrication & Welding Pre-Apprenticeship scheme, addressing the critical welding skills gap in Scotland.



ORE CATAPULT

ORE Catapult champions clean energy development, which it identifies as the UK's largest growth opportunity. With unique facilities around the UK, incorporating world-leading research and engineering capabilities, ORE Catapult brings together industry and academia to drive technology innovation and commercialisation, and to grow the capability and competitiveness of the UK supply chain.

ORE Catapult supports supply chain activities across Scotland through support programmes such as Fit 4 Offshore Renewables and Launch Academy.

It also offers access to the Levenmouth Demonstration Turbine, one of its most important research and development assets. This provides unique opportunities for research and innovation in offshore technologies. Located at Energy Park Fife, it is the world's most advanced open-access offshore wind turbine for research, boosting the region's profile as a centre for energy and related industries, and supporting efforts to engage local people in STEM career paths.

Following access to the Levenmouth Demonstration Turbine, an SME secured a joint venture deal with a wind farm developer and contracts to supply its wind farms in the United States.



TARMAC

Tarmac's material supply is rooted in decades of delivering Scotland's infrastructure. Dunbar, the nation's only regional cement manufacturing facility, remains a cornerstone of Scotland's industrial heritage. This legacy underpins Tarmac's role in supporting the rapid expansion of renewable energy projects, including the recent supply delivery at the Ardersier Energy Transition Facility and Sumitomo cable factory at the Port of Nigg.



Serving thousands of customers, value is created through resilient local supply chains, capable SMEs and community partners who uphold rigorous quality, safety and environmental standards, reflecting the pride and performance that have defined Scotland's construction sector for generations.

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 the Scottish Offshore Wind Energy Council and Scotland's three enterprise agencies. It promotes, connects and guides suppliers that 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 sector.

Roundtables were held in Shetland, Glasgow, Aberdeen, Edinburgh and Inverness with developers, suppliers and other regional stakeholders to discuss

Tarmac is actively working with developers, ports, contractors and designers to unlock concrete floating wind, helping to enable Scotland's manufacturing future.



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 Clean Energy Cluster takes a collaborative approach, working alongside the Offshore Wind Industry Council, regional strategic partners, local authorities and academic institutions.



SUPPLIER CASE STUDIES

The following case studies showcase some of the talented and entrepreneurial suppliers that are bringing their expertise to Scotland's renewable energy market.

Scotland's green energy suppliers provide their services to renewable energy technologies including:

 HYDRO	 HEAT	 ONSHORE WIND
 WAVE AND TIDAL	 STORAGE	 HYDROGEN
 OFFSHORE WIND	 SOLAR	 OTHER

ABBHEY LOGISTICS

Materials mission: From A to everywhere

Haulage business, Abbey Logistics, offers rapid mobilisation, flexible scheduling and an inherent understanding of regional logistics. Its familiarity with local routes, weather conditions and regulatory requirements enables smoother operations and reduces delays, particularly during periods of peak activity.

From a network of depots around the UK, including Dunbar, Glasgow and Inverness, the third-party logistics provider has played a crucial role in ensuring the efficient and timely supply of materials across Scottish infrastructure projects, including Ardersier Energy Transition Facility, Sumitomo's subsea cable manufacturing facility at the Port of Nigg, RAF Lossiemouth, several onshore windfarms and Scottish defence projects.

Abbey Logistics' dependable service, clear communication and proven capability to handle high-volume haulage make it a trusted delivery partner for clients such as Tarmac. The business is an essential contributor to clean energy and infrastructure projects across the country.

"To lower our carbon footprint and support the transition to renewable energy supply chains, Abbey Logistics has implemented several initiatives. We're powering our sites with solar energy and utilising electric discharge equipment to support electric vehicles. We've also increased inter-modal transport and vehicle payload efficiencies, while moving forward with transition fuels like hydrotreated vegetable oil (HVO) and compressed natural gas (CNG), including the launch of our first bespoke CNG and electric tractor units this year."

Mike Ellis,
Powders Commercial Director,
Abbey Logistics



ABSELINE LLP

Visualising a clean energy future with leading landscape design

Founded in 2023 and with 24 years' experience across its highly skilled team, Abseline provides renewable energy projects with specialist advice on landscape-led design, Landscape and Visual Impact Assessment (LVIA) and expert witness services across the UK.

With a focus on aiding decision-making, seeking creative design solutions that mitigate landscape and visual effects and good communication with council officers, the company's support on Swinlees Wind Farm, near Dalry in

North Ayrshire, delivered a smooth consent process for the six-turbine project. The project received no requests for further information on landscape and visual matters and was successfully consented by the local planning committee in February 2025.

Further successful projects for the business include supporting consents for Hollandmey Renewable Energy Development in the Highlands, Byers Gill Solar Farm near Darlington and the Dragon and Mynydd Fforch Dwm wind farms in Wales.

Abseline has also played a key role in bringing forward new sites for development, having provided feasibility and early design advice for 44 renewable energy projects since early 2023.



"At Swinlees Wind Farm, our focus was on providing clear, effective LVIA advice that reduced consenting risk and aided local decision-making. We were pleased to support the project in achieving its consent."

Mark Evans,
Partner, Abseline LLP



Cutting through the noise with environmental expertise

ACCON UK supports all stages of planning applications for a diverse range of renewable energy projects, spanning from single turbines and large-scale commercial wind farms to 8MW solar farms and 250MW Battery Energy Storage Schemes (BESS).

Founded in 2007, ACCON has undertaken projects throughout the UK. Utilising its strategically located team of experts from its offices in Arbroath, Brighton and Reading, the company is committed to growing within Scotland's renewable energy industry in 2026.

ACCON's most recent successes include helping to secure planning permission for solar farms, BESS facilities and a pulverised fuel ash extraction project located within Sites of Special Scientific Interest. ACCON has also provided ongoing noise monitoring and vibration management protocols to a variety of projects to ensure they achieve compliance with strict environmental criteria.



"ACCON UK Ltd is committed to delivering a high standard of technical advice to provide our clients with the robust information they require today to progress the renewable energy projects of tomorrow. From air quality, noise, vibration and lighting solutions to daylight/sunlight predictions, monitoring and environmental impact statement services, ACCON UK has built a wealth of expertise. To ensure a cleaner future, we're committed to sustainability and are proud that our work has won a number of industry awards."

Graham Parry,
Managing Director, ACCON UK Ltd



Sustainable design that works as hard as you do

Amos Beech is a workplace design consultancy which develops sustainable office environments using materials that either reduce carbon emissions or can be recycled.

Working with Scottish Renewables, Amos Beech designed a new office environment with a warm and welcoming atmosphere by utilising many natural and recycled products that reflect the organisation's commitment to a low-carbon future. Other successful projects in the green energy sector include a new office layout for Natural Power and a new office in Glasgow for consultancy TNEI.

As part of the company's commitment to improving the environment, Amos Beech supports a mission to rewild Scotland's native woodland for future generations, providing space for wildlife to flourish and communities to thrive.

Having established its own grove, Amos Beech plants 13 trees per 1,000 square feet of refurbished and fitted-out office space and has planted 65 trees in Scotland.



"Working with Scottish Renewables was a great experience and we learnt so much about the work they do to promote the renewable energy industry in Scotland. It was also a proud moment to announce our Scottish Highland forest had grown by 5000sqft as a result of the business they placed with us."

Sam James,
Director of Sales and Marketing,
Amos Beech



"It has been a fast-paced year for Apollo, and I am proud of the further contributions made by the team in offshore renewables. From design challenges to long-term integrity assurance, we continue to innovate, problem solve and help map out the path to a scaled-out renewable energy sector"

Nigel Robinson,
Marine Energies Director, Apollo



Engineering solutions for the toughest marine environments

Apollo is an engineering and advisory consultancy operating across the energy sector, with particular expertise in marine renewable energy. Its 150-strong team has supported wind, wave and tidal developments throughout the company's history, delivering practical engineering solutions in some of the toughest environments.

2025 was a significant year for the business as it continued to support the renewable energy industry and resolve key technical challenges. Working with Intertek, Apollo delivered guidance on the structural integrity of offshore wind for the Energy Institute and, in partnership with DOF, secured an ORE Catapult project focused on mooring and cable monitoring methods. The company also continued to advise developers on mooring integrity and deliver innovative design solutions, including the design of Verlume's Orah subsea battery.

Apollo's PALM Quick Connection System also progressed, completing full-scale Front-End Engineering Design (FEED), sponsored by the Offshore Wind Growth Partnership and Wave Energy Scotland and guided by a blue-chip steering committee. The company is now preparing for its first pilot deployment and is engaging with the floating offshore wind sector to make this a reality in 2026/27. Further work includes collaborating with ORE Catapult to design and supply a 3,000-tonne mooring line test rig and with the European Marine Energy Sector, through the EU-funded FOREST project, to advance PALM QCS readiness for wave and tidal devices with growing opportunities for deployment in both UK and international markets.





Reducing risk: testing the technology of tomorrow

Applus+ is a global provider of testing, inspection and certification services. With its UK headquarters based in Falkirk and its Vendor Surveillance Services managed out of Aberdeen, the company has 65 offices around the world, and a track record in delivering onshore and offshore solutions for the renewable energy industry.

Drawing on a proud history across oil and gas, power generation, transport and logistics, aviation, construction and civil engineering, Applus+ helps its clients ensure their assets are safe, reliable and efficient, while also reducing environmental impact.

The testing specialists undertake detailed reviews of wind farm design documents and oversee the production processes of key wind farm components at manufacturing facilities. By offering a full suite of services – from advanced and conventional non-destructive testing (NDT)

to quality assurance and technical engineering assistance - Applus+ helps mitigate performance risk and maintain high quality standards. This approach ensures long-term return on investment while remaining fully independent from manufacturers.

Recent renewable energy successes for Applus+ include the inspection of topside structures, jacket foundations, transition pieces, turbine transportation grillages and cable storage baskets. What's more, in 2025, the company used its magnetic crawler to provide specialist eddy current array and phased array ultrasonic NDT to inspect monopile foundations before they were transported offshore to the Dogger Bank wind farm. Ultrasonic testing and magnetic particle inspection were also utilised to inspect the grouted connections between turbines and foundations.

“It is vital to inspect all critical path articles in the construction of a wind farm, whether it is fully fabricated structures, cables, pipelines or connection points, especially for offshore units where the environment presents a high risk to materials, such as steel and grout. Applus+ helps to safeguard operations, reduce the risk of failure and prevent project delays by enhancing the quality and safety of our clients' assets.”

Jim Splaine,
General Manager, Applus+



“Securing the Neart na Gaoithe offshore wind farm contract marks a significant milestone for ARB Wind and reflects the strength of our expertise in asset integrity and inspection services. As we continue to expand our offshore capabilities, we're proud to support the long-term performance and reliability of critical renewable energy infrastructure. This partnership reinforces our commitment to delivering high-quality, innovative solutions that help drive the UK's transition to a more sustainable energy future.”

Arran Bell,
Managing Director, ARB Wind



Advanced asset assurance

In 2025, ARB Wind, specialists in asset integrity services to the UK's wind energy sector, secured a significant contract to deliver services for Neart na Gaoithe (NnG) offshore wind farm. The milestone contract marks a major step in expanding the company's offshore capabilities and will see it deliver dedicated inspection and maintenance activity for the project.

The Fife-based business, part of the Briggs Group, will provide dedicated Balance of Plant technicians to deliver a wide range of services across NnG's offshore and onshore assets. These include the wind turbine foundations, offshore substation platforms, the onshore substation in East Lothian, the Eyemouth Operations and Maintenance facility and storage sites in Rosyth and Blyth.

The contract also includes both baseline and scheduled above-water inspections designed to ensure the continued integrity of the 56 offshore foundations. Inspections began with a phase of Remote Visual Inspection (RVI) using Unmanned Aerial Vehicles (UAV). This will inform and support subsequent on-asset General and Close Visual Inspections (G/CVI) performed using industrial rope access techniques.

These essential services will support the smooth running of the EDF power solutions UK and Ireland and ESB-owned offshore wind farm, which became fully operational in July 2025.





CAIRN RISK CONSULTING

Reducing risk for a sustainable future

Cairn Risk Consulting is an independent risk management consultancy supporting major renewable energy and energy transition projects across the UK and internationally. The company focuses on protecting people and the planet through effective health, safety, environmental, societal and asset integrity risk management.

Having supported more than 15GW of renewable energy projects, providing support and training to clients managing the challenges associated with the energy transition, the go-to consultancy recently expanded its range of services. Drawing on knowledge and techniques learned from traditional industries, the company applies proven methods adapted for new technologies.

Cairn Risk's latest projects include securing long-term support contracts for several large offshore wind farms, framework agreements with national energy providers and delivering support for solar and battery energy system storage projects. For the green hydrogen sector, the growing business provided Process Safety Management support during the Front-End Engineering and Design phase of a Hydrogen Allocation Round 2 shortlisted project.

Working closely with the client, Cairn Risk's findings and advice facilitated a redesign of the site layout, leveraging inherent safety principles to minimise hazard potential and enable demonstration that residual risks are reduced to As Low As Reasonably Practicable.

"In 2025, we expanded our support throughout the renewable energy supply chain. In 2026, we look forward to further growing our team in response to increasing demand for our services across renewable and energy transition technologies, both nationally and internationally."

"We will also continue to share our experience and learning through our knowledge sharing forums and industry publications, while collaborating with government, trade associations and regulators at industry events."

Tom Semple,
Director and Co-Founder,
Cairn Risk Consulting

CLARKSONS PORT SERVICES

Masters of marine logistics

With more than 50 years of experience supporting marine and port operations, Clarksons Port Services (CPS) is a well-established and trusted member of the Scottish supply chain.

Building on decades of experience in port logistics, CPS delivers integrated logistics management services from 22 locations to support offshore wind projects across the UK and beyond. Its tailored lifecycle support includes port agency, crew change coordination, freight forwarding and helicopter services, ensuring seamless operations while reducing risk and improving cost-efficiency for wind farm operators.

CPS has a strong track record within the renewable energy industry, demonstrating consistent delivery, collaboration and growth. The company successfully supported wind turbine installation at the Neart na Gaoithe (NNG) offshore wind farm and, in partnership with GEO, carried out pre-lay survey work for both Berwick Bank and West of Orkney offshore wind farms.



Currently, CPS is supporting the Inch Cape offshore wind farm across multiple scopes. These include pre-lay surveys and unexploded ordnance (UXO) removal with N-Sea, monopile delivery to Port of Leith with COSCO, supply base operations and helicopter chartering with Noble Drilling, as well as substation installation with Heerema.

Looking ahead, the port specialist is preparing to support maintenance activities on Moray East offshore wind farm with DEMA, as well as cable lay support on Inch Cape in partnership with N-Sea. In addition, its support for the Dogger Bank project further strengthens CPS's contribution to the UK's renewable energy infrastructure.

The company's ambition is to continue expanding its offshore capabilities, delivering safe, efficient and sustainable solutions that support the global transition to clean energy.



"Our teams across Scotland continue to demonstrate what our collaboration and capability can achieve. We support clients both locally and globally, bringing fabricated components into Scotland for major offshore wind projects. From early development surveys to large-scale offshore installation campaigns, we consistently deliver safe and efficient solutions that drive renewable energy progress. With our strong local presence and deep expertise, we are a trusted partner for both fixed and floating wind projects, helping to advance Scotland's clean energy ambitions."

Paul Young,
Account Manager – Offshore Energy,
Clarksons Port Services



ECOCEL SERVICES

Pitching the progress of sustainable parts

Ecocel Services provides installation, operations and maintenance services for onshore wind turbine owners.

The growing company recently launched a parts division in May 2025 and, after successfully supporting ScottishPower Renewables (SPR) with major component exchanges, servicing and blade repairs, was awarded a multi-million-pound contract to deliver asset upgrades across 204 wind turbines. The contract will see Ecocel supply all the necessary parts to fully exchange and install the Siemens

Gamesa pitch control system, which adjusts the angle of the blades, enhancing turbine efficiency and maximising renewable energy generation.

This contract success created the need for new premises in Kilwinning, allowing Ecocel to store and distribute the required parts and will more than double the company's workforce from 18 to 42 across the first six months of the project.

To drive sustainable solutions, the company has established a new facility in Irvine for recycling parts that are then reissued to industry. The first batch of components to be given a second life at this facility will be those removed from turbines during the activity already underway on the SPR pitch project.

EUROPEAN MARINE ENERGY CENTRE



World-leading ocean energy test and demonstration site

Established in Orkney in 2003, the European Marine Energy Centre (EMEC), a testing and demonstration facility for ocean energy technologies, has hosted more marine energy devices for testing than any other site in the world. The centre plays a pivotal role in advancing wave and tidal energy, alongside pioneering research and development in green hydrogen for synthetic fuels, island decarbonisation and innovation projects in fixed and floating offshore wind.

Operating as a plug-and-play facility, EMEC reduces the time, cost and risk associated with testing innovative sustainable technologies, accelerating their route to commercialisation. A 2023 economic impact assessment showed that, over two decades, EMEC's operations have generated £370 million Gross Value Added for the UK economy, with £263 million benefiting Scotland and £130 million delivering an economic boost to Orkney, creating 224 local jobs.

EMEC's activities have fostered a thriving supply chain in Orkney, with local companies now exporting expertise across the UK and internationally. In addition to wave and tidal

demonstration, current initiatives include delivering the Offshore Wind Research & Innovation Programme which supports companies to overcome technical challenges.

Looking ahead, EMEC plans to expand its tidal test site at Fall of Warness to enable array-scale demonstrations, alongside exploring a National Floating Offshore Wind Test Centre to the west of Orkney. This would build on EMEC's world-leading wave, tidal, hydrogen and testing facilities and continue to support economic benefits for coastal communities in the Highlands and Islands.

“EMEC was set up in 2003 to kick-start the ocean energy sector in the UK and boost economic development in the Highlands and Islands. Over the past 20 years, activity in Orkney driven by EMEC has been a catalyst for economic development, creating jobs and a world-leading supply chain now exporting skills and knowledge globally.”

Eileen Linklater,
Corporate Affairs Director,
European Marine Energy Centre



“The Neart na Gaoithe project has clearly demonstrated the strategic role that regional ports like Eyemouth can play in Scotland’s offshore wind sector. As a Trust Port, we are focused on ensuring that this activity translates into long-term economic value for our community. Through our Harbour Masterplan, we are investing in infrastructure, capacity and skills to support future projects, strengthen the local supply chain and position Eyemouth as a key hub for offshore energy in the years ahead.”

Christine Bell,
Chief Executive, Eyemouth Harbour Trust

offshore wind in mind – supporting both new contracts and supply chain activity.

EHT has also provided various additional services to NnG, including oil spill response, pontoon inspection and maintenance, debris removal and grounds maintenance, including pest control and snow clearance/salting, all of which add value to the long-term leases.

To meet the growing demands, EHT has expanded its operations team with a local port operations apprentice and increased capacity in the administration team.

Overall, the project activities have had a transformative impact on EHT, empowering it to deliver its mandate as a Trust Port and setting it up for future success with other renewable energy projects.

EYEMOUTH HARBOUR TRUST

Harbour at the heart of its community

Nestled within the Berwickshire coast, Eyemouth Harbour is quietly powering one of Scotland’s most significant renewable energy projects. As the home of the Operations and Maintenance (O&M) base for the Neart na Gaoithe (NnG) offshore wind farm, the harbour is proving why it’s a natural partner for offshore wind development.

The partnership between NnG’s and Eyemouth Harbour Trust (EHT) has not only boosted the Trust’s revenue but also created valuable local employment opportunities. As a Trust Port, Eyemouth reinvests all surplus funds, prioritising long-term value for both users and the community. This approach, combined with the harbour’s accessible location, just off the A1 and within reach of key wind development zones, has made it a first choice for developers.

Looking ahead, Eyemouth is set to expand. A new Harbour Masterplan will include a deep-water expansion, 700 metres of additional berthing, 10 metres of depth, shore power and heavy lift capacity. These proposals are designed with



Delivering installation solutions with local partners

FairWind delivers installation, preassembly and service solutions for onshore and offshore wind turbines. With operations in over 40 countries, a team of more than 2,200 technicians and a robust global supply chain, FairWind supports renewable energy projects worldwide.

With a Scottish base in Aberdeen, the company has been providing solutions to the renewable energy industry since 2008, driving growth across Scotland’s supply chain. At a wind farm in the Highlands where FairWind installed three turbines, Scottish subcontractors were deployed to provide crane, transport and logistics services utilising specialist skills and benefiting the local economy. In addition to installing 18 turbines on a separate wind project in the West of Scotland, FairWind supported the local supply chain through services in traffic management, welfare and equipment hire, while delivering technician training and growing the workforce.



This year, FairWind will begin construction of a 22-turbine site with 22 more to be delivered in 2027. As these projects will sustain demand, create long-term employment and attract regional investment, FairWind is establishing a new UK and Ireland base in Glasgow.

With 21 turbines installed in 2025 and with programmes committed to the ongoing development of its workforce, FairWind helps deliver Scotland’s net-zero goals through sustainable, locally-driven renewable energy projects.

“The UK continues to play a leading role in the global transition to renewable energy and the wind sector is vital to achieving national net-zero targets. With increasing demand for efficient, large-scale installation and maintenance solutions, we look forward to supporting the sector with our technical excellence, operational reliability and commitment to local delivery.”

René Damgaard,
Regional Director – United Kingdom & Ireland,
FairWind





Going global with AI-assurance for offshore wind

Fennex develops AI-powered safety and assurance systems that improve the safety, efficiency and transparency of offshore operations. Based in Aberdeen, the company has transformed digital safety management across the oil and gas sector and is now applying this proven expertise to offshore wind. Its flagship product, WindSafe, provides real-time visibility, predictive risk insights and automated workflows, enabling safer and more efficient offshore wind operations.

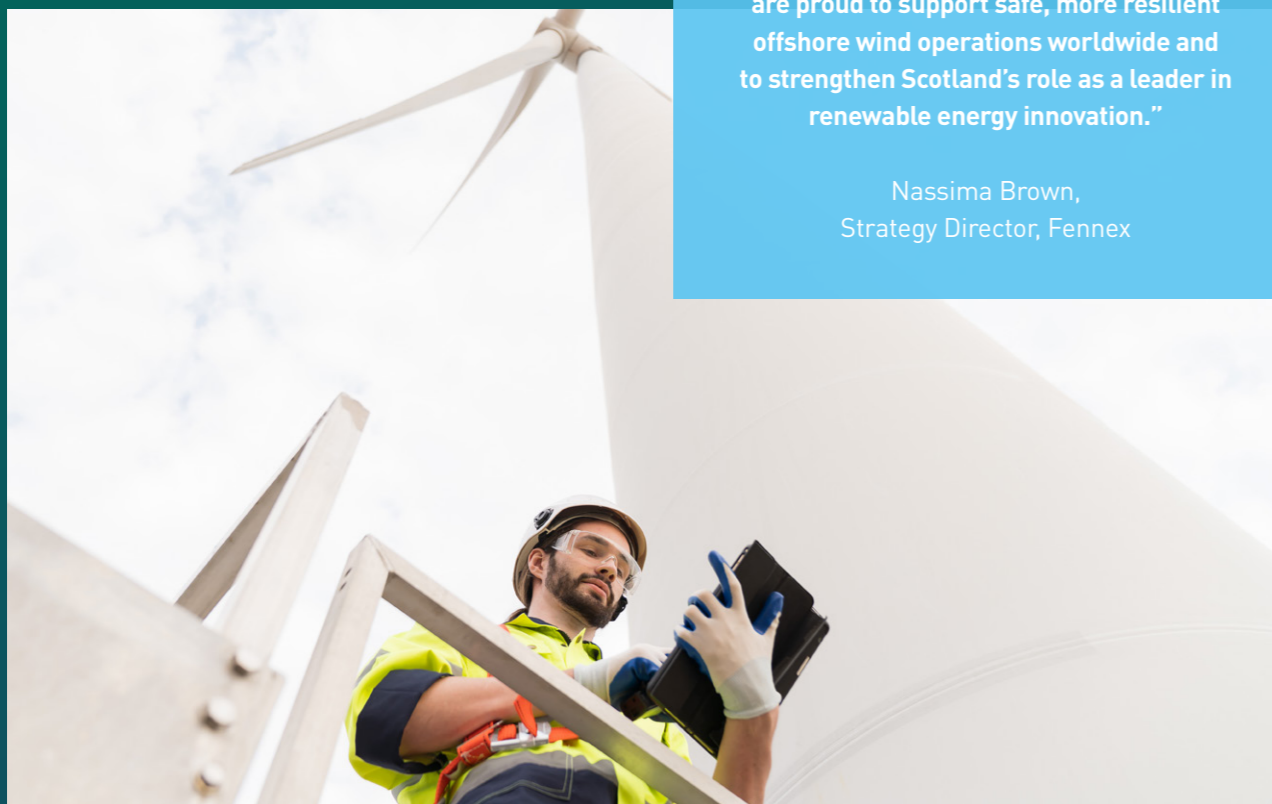
In June 2025, Fennex partnered with the BlueFloat Energy | Nadara Partnership to agree the deployment of WindSafe across its 4.4GW floating offshore wind portfolio in the UK, including the Stromar, Sinclair, Scaraben, Bellrock and Broadshore projects which were fully acquired by Nadara in November 2025. The platform will support these large-scale developments as they progress into construction, supporting early risk identification, streamlining reporting and improving technician safety.

WindSafe represents a significant shift in how developers and operators manage risk and assurance in floating offshore wind. The platform enables developers to consolidate contractor reporting into a single, unified system, creating shared visibility across stakeholders and supporting a truly collaborative safety culture built on consistent, real-time data.

Looking ahead, Fennex is working with international developers on digital safety transformation across projects in Europe, Asia and North America. The company is developing the next generation of its AI safety intelligence, incorporating enhanced predictive models, operational risk tools and automated verification. This includes new decision-support features designed to improve safety during vessel-to-turbine transfers. These improvements further strengthen a connected, data-driven approach to the safe and efficient rollout of offshore wind projects in the future.

“WindSafe combines our proven digital safety technology with the requirements of today’s offshore wind projects, delivering the real-time intelligence needed to manage growing risk and complexity. We are proud to support safe, more resilient offshore wind operations worldwide and to strengthen Scotland’s role as a leader in renewable energy innovation.”

Nassima Brown,
Strategy Director, Fennex



“We are proud to continue to support our growing customer base as a trusted inspection services partner. Our relationships with major customers, technology partners and our strong track record is testament to the quality and reliability of our services. We look forward to achieving further growth and delivering dependable solutions for our customers across the renewable energy industry.”

Scott Martin, Group CEO,
Glacier Energy



International inspection

Glacier Energy delivers comprehensive inspection, advanced analytics, reporting and remediation services for energy and industrial markets, deploying innovative conventional and advanced non-destructive testing (NDT) techniques across the globe.

With a track record in NDT of foundations for global offshore wind projects spanning more than 30 years, Glacier Energy has inspected:

- 2600+ monopiles and transition pieces
- 2500+ piles
- 100+ jackets
- 50+ substations.

Throughout 2025, The company had further offshore wind success. Firstly, SeAH Wind appointed Glacier Energy to provide NDT services throughout the monopile manufacturing process at its new 120-acre site at Teesworks. This followed by Glacier Energy becoming the preferred NDT supplier for a new customer in Spain

As well as developments in offshore wind, it has been developing its offering for the operation and maintenance of in-service wind farms. This has involved collaborating with technology partners such as Illosto to provide digital AI monitoring software which uses 3D modelling to enable best-in-class data collection, analysis and reporting.

Glacier Energy also has the capability to carry out mechanical repair, welding and life extension services through another group company to ensure safe, efficient operations. This capability has been recently demonstrated at a wind farm in Northern Europe, with both NDT and up tower welding repairs being completed.



GLOBAL ENERGY SOLUTIONS

Maintaining essential energy assets

Based in Invergordon within the Port of Cromarty Firth Green Freeport, Global Energy Solutions (GES) is a specialist provider of inspection, maintenance and repair, construction and installation services, supporting the safe installation and reliable operation of offshore wind components throughout their lifecycle.

GES has successfully delivered more than 300 projects with zero lost-time incidents and a 94% on-time completion rate, demonstrating its strong commitment to safety, quality and industry best practice. Its leadership group brings together over 120 years of combined experience, supported by a highly skilled, multi-disciplinary team of more than 500 personnel.

With renewables accounting for more than 80% of the business, the company has significantly grown its support of the offshore wind sector over the past year, delivering more than 100,000 work-hours on offshore renewable energy projects for major developers. A prime example is leading a snagging campaign on Ocean Winds' Moray West offshore wind farm, carrying out maintenance and repairs to ensure turbine components operate at the highest standards.

Alongside its expanding renewable energy project portfolio, GES is playing a key role in strengthening the northeast of Scotland's position within the global offshore wind supply chain.

"Our recent move to bring our brand closer to the wider Global group is creating greater opportunities for collaboration and strengthening our ability to deliver larger, more complex energy and infrastructure projects. This is already being reflected in the award of major renewable energy infrastructure contracts, both in the UK and overseas. Backed by our experience and people, we are well-positioned to grow our presence across the renewables sector while maintaining the high standards our clients expect."

Ross Thomson,
Managing Director,
Global Energy Solutions

HITACHI ENERGY

New Glasgow engineering hub to support critical UK grid upgrades

Hitachi Energy is a global electrification supplier, powering a sustainable energy future with innovative power grid technologies. More than three billion people depend on its technologies to power their daily lives. With over a century of experience pioneering mission-critical technologies spanning high-voltage, transformers, automation and power electronics, Hitachi Energy is addressing one of the most urgent energy challenges of our time – balancing soaring electricity demand while decarbonising the power system.

With bases in more than 140 countries, the business builds long-term partnerships across the utility, industry, transportation, data centres and infrastructure sectors.

Strengthening the UK's energy-networks supply chain, the company has announced plans to open a new Engineering Centre of Excellence in Glasgow. Backed by a £1.7 million grant from Scottish Enterprise as part of a £3 million total investment, the hub will create around 90 high-value roles in specialist engineering and project management. These teams will focus on upgrading and digitalising the UK's electricity grid to support the transition to clean power by 2030 and net-zero by 2050.

The centre is a strategic investment in national capacity. By developing and retaining specialist expertise in Scotland, Hitachi Energy is ensuring the UK has the skills needed to deliver the coming wave of energy-system projects, while linking Scotland's engineering talent to a global network. It forms a central part of the company's plan to expand its UK workforce to more than 1,000 by 2027.



"This represents a significant investment in Scotland and adds to our footprint across the UK. The investment is largely due to the continued trust of our customers in helping them to deliver the energy system of the future. Together, we are rapidly expanding to meet soaring demand for grid infrastructure. Across the UK and in Scotland, we plan to expand to more than 1,000 employees by 2027, offering long-lasting and rewarding careers with this site being key to our growth, placing Scotland as central to achieving Clean Power by 2030."

Laura Fleming,
Country Managing Director for the UK and
Ireland, Hitachi Energy





“Scotland’s renewable energy sector is filled with powerful stories of innovation, collaboration and local impact. At Ithica, we’re proud to capture and amplify those stories, showcasing the people and businesses driving the transition to a cleaner, more resilient future.”

Matt McGough,
Creative Director, Ithica



Capturing Scotland’s renewable energy success stories

Ithica is an award-winning independent film studio specialising in cinematic storytelling for organisations across the renewable energy and industrial sectors. The studio produces high-quality films that communicate innovation, impact and progress, helping clients showcase projects, engage stakeholders and highlight the value they delivered to Scotland and beyond.

Ithica has played a key role in documenting Scotland’s renewable energy journey through projects with leading developers, including Inch Cape Offshore and Boralex. With more than 20 years of experience in the industry, its films are expertly crafted to highlight the significant economic benefits delivered by Scottish suppliers and the positive impact of projects on local communities and the wider economy.

Ithica has extensive experience shooting major renewable energy projects for developers and suppliers such as

RWE, Smulders, SPIE Wind Connect and Van Oord. Its expertise in onshore and offshore filming, drone operations and documentary-led storytelling showcases crucial project milestones from port upgrades to turbine component movements, helping partners communicate the real-world impact of their investments.

Looking ahead, as a Global Wind Organisation (GWO) accredited business, Ithica plans to continue expanding its renewable energy portfolio, strengthening partnerships and championing the people and innovation driving Scotland’s energy transition.



JONES BROS CIVIL ENGINEERING



Carefully choreographed construction

Civil engineering company Jones Bros delivers expert construction work in some of the UK’s most demanding environments. With expertise in energy, flood and coastal protection and waste management facilities, its engineers deliver innovative solutions for infrastructure projects across the UK.

Recent success for the business includes supporting the complex construction and logistics programme for the Windy Standard III onshore wind farm. The major £133 million, 20-turbine project currently under construction is recognised at the ministerial level for its importance to Scotland’s energy transition.

The project required careful consideration for the local environment and coordination with Police Scotland to escort abnormal loads to the project site, as well as ongoing adjustments to the construction programme to maintain progress against its Contracts for Difference contract milestones. Jones Bros’ civil engineering activity sits at the centre of this – ensuring safe design, efficient turbine component routing, competent foundations, access construction and supporting the programme through periods of external constraint, including escort reductions and scheduling revisions. The company’s support has kept the project aligned with grid connection, transport and construction sequencing requirements.



“In the Scottish renewables sector, progress relies on engineering partners who can navigate complexity without compromise. Jones Bros brings that balance to life by combining environmental sensitivity, precise logistics, and resilient planning to keep clean energy infrastructure moving. Our work shows how disciplined civil engineering underpins the UK’s transition to a more reliable, sustainable power future.”

Garod Evans,
Contracts Director,
Jones Bros Civil Engineering

From acorn to oak: growing expertise in clean energy engineering

Based in Scotland, with offices across the central belt, Kiloh Associates is a civil, structural, geotechnical and environmental engineering consultancy providing practical services across the energy sector. The company has grown from less than 20 employees in 2023 to almost 50 in 2025, driven by organic growth and the acquisition of specialist structural engineers Christie Gillespie.

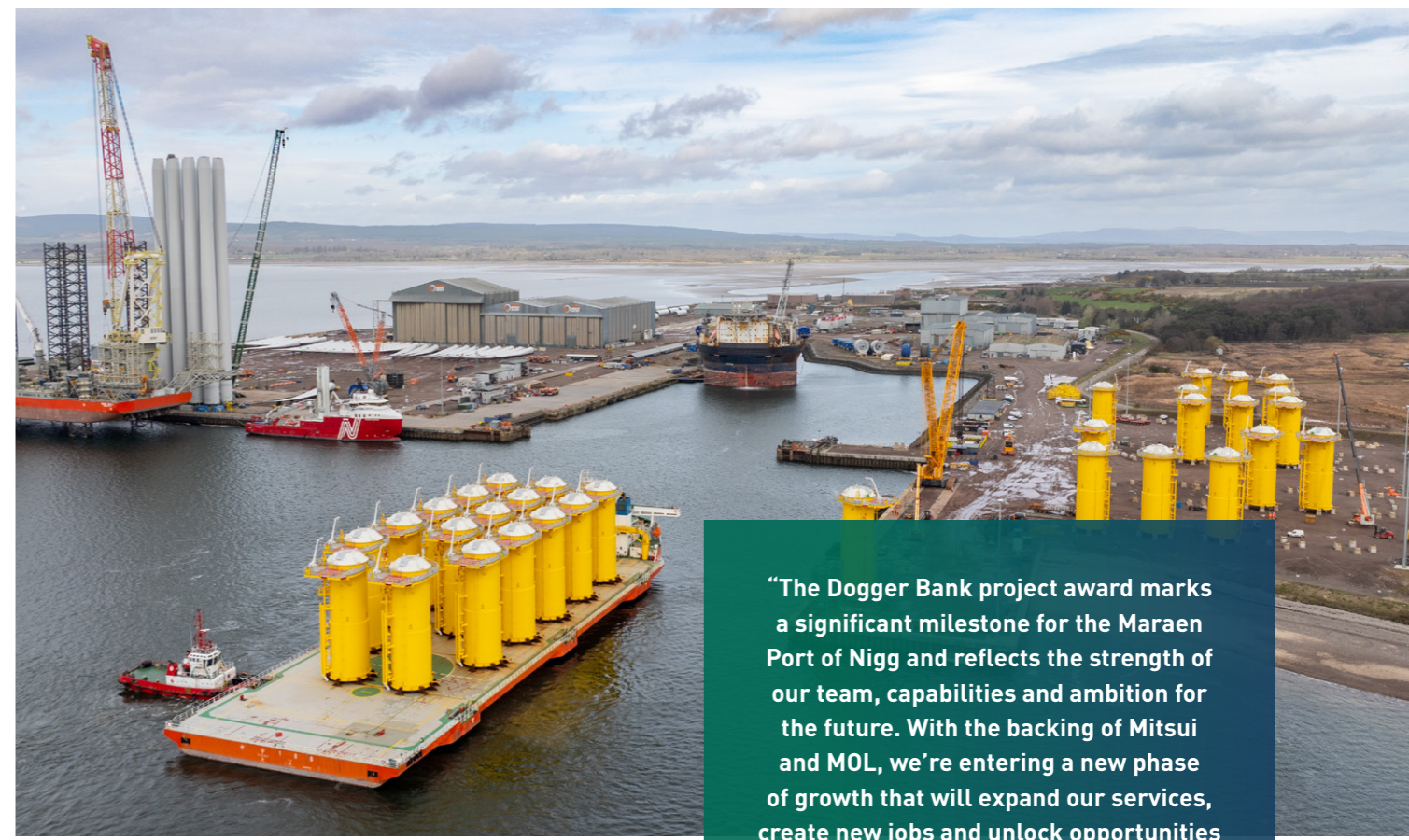
Kiloh supports clients throughout the project lifecycle, across grid, wind, solar, scale battery energy storage systems and hydro projects. Its teams deliver construction design and management as well as principal design services. For more than 15 years, Kiloh has delivered projects across the UK for renewable energy developers, EPC contractors and network operators.

Recent examples of Kiloh’s renewable energy successes include:

- Detailed design through the construction phase of the Kilmarnock South battery energy storage system (BESS).
- Feasibility and detailed design for more than ten BESS sites from 50MW to 600MW.
- Turbine modification, structural analysis and design to reduce an existing turbine hub height for a private client.
- Detail designer on 100+ substations, including Fort Augustus and Connagil Cluster connections.
- Construction environment support for Whitelaw Brae wind farm.
- Various 3D-modelled wind farm outline designs to streamline planning applications.

“Kiloh Associates has a proven track record of supporting renewable energy projects over the last 15 years. With our recent growth, this experience has expanded into all civil, structural and environmental elements of renewable energy, with the Kiloh team handling a wide variety of feasibility, design and construction engineering challenges to support the growing supply chain demand in the renewable energy industry.”

Frazer Harrison,
Projects Director, Kiloh Associates



“The Dogger Bank project award marks a significant milestone for the Maraen Port of Nigg and reflects the strength of our team, capabilities and ambition for the future. With the backing of Mitsui and MOL, we’re entering a new phase of growth that will expand our services, create new jobs and unlock opportunities in large-scale manufacturing for the offshore renewable energy market. As a Green Freeport site, we’re proud to play a central role in strengthening the UK’s renewable energy supply chain.”

Iain Sinclair,
Chief Strategy Officer, Maraen

MARAEN PORT OF NIGG 

National asset marshals offshore wind projects from quayside to completion

Maraen Port of Nigg is a major energy infrastructure facility, recognised for its scale, capability and consistent delivery of offshore wind projects. Following the acquisition of the port by Mitsui & Co., Ltd. and Mitsui O.S.K. Lines in 2025, the business has entered a new phase of growth and now operates under the integrated energy infrastructure brand Maraen.

Located in the Cromarty Firth, Maraen Port of Nigg has developed deep-water quays, extensive laydown areas and integrated fabrication, assembly and load-out capabilities. Since 2018, the team has supported four consecutive offshore wind campaigns, delivering almost 4GW of projects.



In 2025, the port was selected as the pre-construction base for wind turbine generator components for Dogger Bank B and C, part of the 3.6GW Dogger Bank offshore wind development. As part of this project, the port will provide essential on-site support services, including logistics, warehousing and security, safeguarding existing jobs and creating new roles at the facility. Upon completion, Nigg’s contribution to offshore wind will exceed 6GW.

This contract represents the first major offshore wind project award since the acquisition, reinforcing long-term investment in the site and its role as a critical national infrastructure asset. Plans are being developed to expand on-site capabilities, including new manufacturing facilities, to strengthen the UK’s renewable energy supply chain. As a Green Freeport site and active member of the Scottish Offshore Wind Ports Alliance, Maraen Port of Nigg is well-positioned to support the future growth of offshore wind in Scotland.

“MB Plant, your one-stop hire shop for all your rental needs. Lifting standards and lowering emissions, driving a greener, cleaner future for generations to come.”

Sheena Stephen,
Business Coordinator, MB Plant



Equipping the energy transition

Based in the north-east of Scotland, MB Plant has been offering vehicle, plant and access equipment hire for more than 30 years. Expanding its reach across the UK, the company pairs high-quality rentals with logistics services, including haulage, accredited training, garage services and used plant and vehicles.

MB Plant is playing a key role in the energy sector, providing support to Peterhead Power Station, St Fergus Gas Terminal and the offshore oil and gas sector before moving to serve the renewable energy industry.

The family-run business has embraced the opportunities arising from the energy transition by investing in technologically advanced equipment to support clean energy projects and has successfully worked with tier 1 contractors and subcontractors on projects such as the Viking wind farm, Strathory wind farm, Moray East and West wind farms, the Frodo and Bilbo solar farms and Eastern Green Link.

This ambitious investment approach has extended its service provision, upgraded its plant and grown its workforce. By focusing on skills development through an apprenticeship scheme, MB Plant aims to build local expertise, offer training opportunities for its workforce and deliver on its mission to provide safe, high-quality, market-leading hire equipment and services.



Integrated solutions across the energy lifecycle

OEG is a leading energy solutions provider delivering mission-critical infrastructure, technologies and services to the global energy industry. Established in 1973, the company provides specialised above, on and below-water solutions across the full energy lifecycle, from logistics and bespoke equipment to integrated services for construction, operations, maintenance and decommissioning. Headquartered in Aberdeen, OEG employs more than 1,500 people and operates in 65 countries worldwide.

In 2025, OEG secured a contract to support the construction phase of the Inch Cape Offshore wind farm until it becomes operational in 2027. Its support to date includes the provision of marine coordination services, anchoring one crew transfer vessel and three guard vessels on site. The guard vessels are operated by local fishing crews, providing valuable employment opportunities during periods of restricted fishing activity.

OEG has also constructed a high-voltage control room at the company's Edinburgh

office. This is staffed by highly skilled Scottish personnel, ensuring local expertise remains central to project delivery. Additional support includes the supply of two welfare units for marine operations and the onboarding of a local business for spill response management, reinforcing OEG's commitment to environmental safety and local partnerships.

To date, the project has supported employment for more than 50 local people, with this number set to increase throughout the project duration as construction progresses. With work continuing through to 2027, Inch Cape remains focused on delivering sustainable economic and employment benefits for communities across Scotland.

“OEG’s involvement in the Inch Cape project is a testament to our commitment to supporting the sector’s growth with reliable end-to-end expertise. As we look to the year ahead, we will continue to support wind farm development projects, providing local employment opportunities and contributing to a sustainable future.”

Billy Hamilton,
Topside Director, OEG



PETERHEAD PORT AUTHORITY

From port to power: harnessing the collective strength of Scotland's offshore wind supply chain

Peterhead Port Authority (PPA) is a versatile, multi-purpose sheltered port in north-east Scotland operating 24/7, 365 days a year and with a strong track record of supporting the energy sector. The port is actively investing in new projects across maritime sectors, with a particular focus on renewable energy.

A June 2025 study for the Peterhead Energy Transition Forum, led by PPA, projected that £1 billion of investment in the region's move to cleaner, greener energy will generate 800 jobs per year over the next decade.

One of the port's first significant investments stems from its partnership with Maritime Developments Ltd (MDL). MDL plans to invest more than £12 million over the next three years at the new Peterhead Energy Service Base. The facility will provide handling and storage services for power cables and mooring lines destined for offshore wind developments.

The multipurpose facility will also host marine operations for MDL's portable flex-lay technology for offshore deployment, alongside project management and engineering services for vessel mobilisations – building on the company's 25-year presence in the town.



PEEL PORTS

Hub for handling next-generation turbine components

Peel Ports Group is one of the UK's largest port operators, providing safe, efficient and sustainable port-centric solutions for key industries. Across Scotland, its Clydeport facilities provide critical infrastructure for the country's move to a clean powered energy system. From handling project cargo to supporting onshore wind developments, Peel Ports continues to invest in people, capability and assets.

For more than two decades, King George V (KGV) Dock in Glasgow has been central to the delivery of onshore wind projects across central and south-west Scotland. Since 2003, the terminal has supported the installation of around 4GW of renewable energy capacity – equivalent to approximately 40% of Scotland's onshore wind output and enough to power 2.5 million homes.

KGV provides the specialist infrastructure required for today's larger turbine components, including blades, tower sections, nacelles and drive trains. With a 150-tonne crane, an 8.5-metre berth depth and five hectares of laydown space, the terminal regularly handles multiple projects simultaneously. Recent activity includes the Pencloe, Douglas West, Rig Muir, Benbrack, Hagshaw Hill, North Kyle and Cumberhead West onshore wind farms.

To meet the demands of the next generation of turbines, Peel Ports continues to invest in KGV. To improve onward transport routes, a new egress road has been constructed to accommodate components up to 90 metres in length. This, paired with continued workforce development – including the addition of three newly qualified Appointed Persons – ensures KGV can safely manage increasingly complex lifts.

With several new projects already secured for 2026 and beyond, KGV remains a vital hub in Scotland's renewable energy supply chain, supporting the region's transition to cleaner energy.

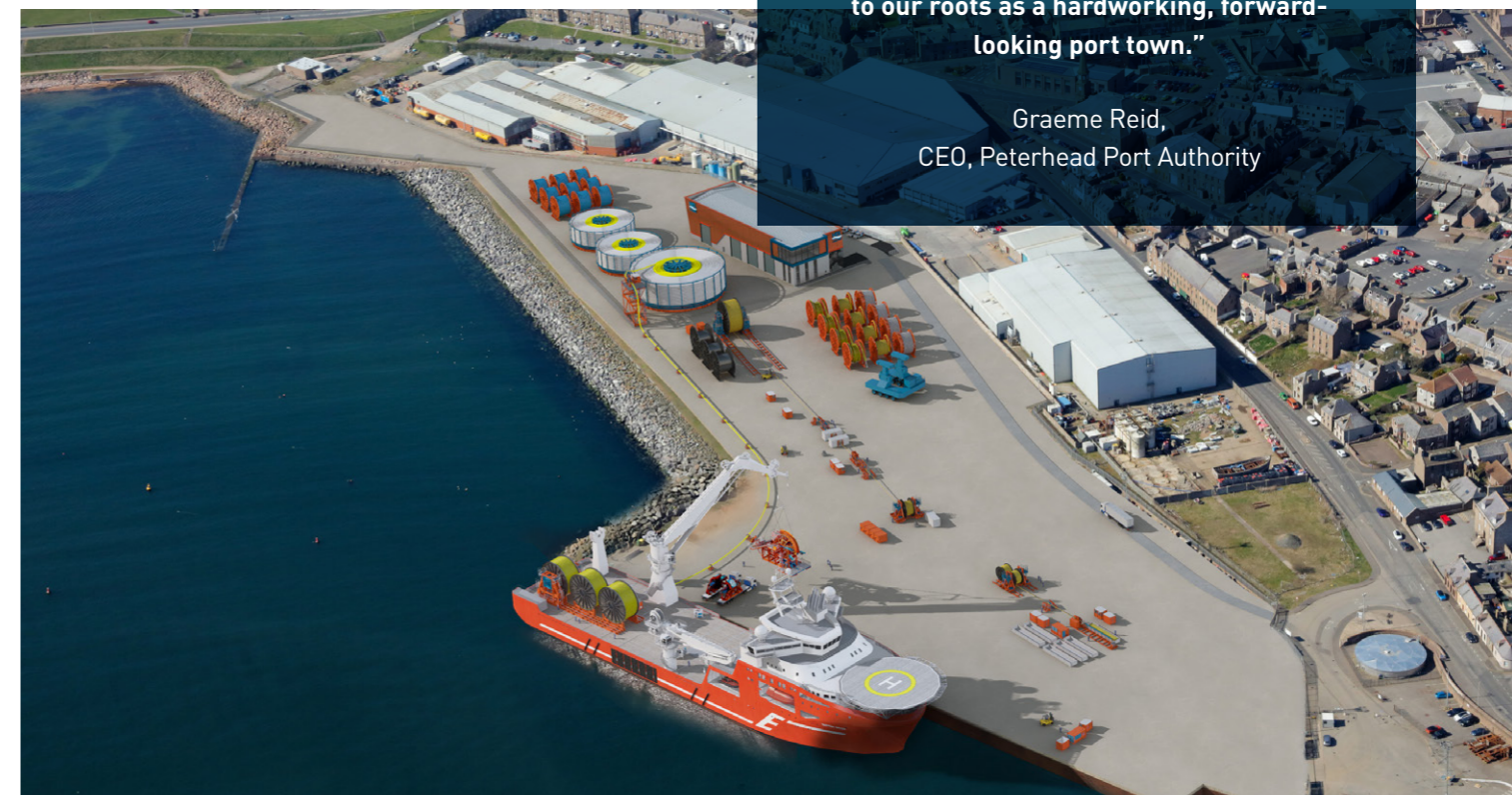
“King George V plays a critical role in Scotland's onshore wind delivery, providing the infrastructure, expertise and capacity needed to handle today's larger, more complex turbine components. Our long-term investment and skilled teams ensure we can support developers, manufacturers and hauliers as Scotland accelerates towards its net-zero goals.”

Jim McSporran,
Port Director – Clydeport,
Peel Ports Group

“PPA's collaboration with MDL is a testament to the strength of our local supply chain and the potential of our community. This new facility will take advantage of the Port's fantastic existing and planned infrastructure, not only to support the future of offshore energy but to create meaningful opportunities for local people and businesses.

“It's about building a sustainable future together – one that keeps Peterhead at the heart of innovation while staying true to our roots as a hardworking, forward-looking port town.”

Graeme Reid,
CEO, Peterhead Port Authority





Seamless integration for offshore wind, wave and tidal

Engineering consultancy Quoceant provides innovation, design, analysis, operations planning and technology integration services for the offshore renewable energy industry. Based in Loanhead, the company supports clients with projects across the offshore wind, marine energy and heat storage sectors, combining technical expertise with a fresh, practical approach.

Quoceant also developed the Q-Connect family of marine quick connection systems,

designed to enable rapid installation and disconnection of energy devices from moorings and electrical cables.

Over the past year, Quoceant has supported projects spanning the full lifecycle – from concept and detailed design through to fabrication and operations – and is recognised for delivering innovative solutions to complex engineering challenges.

Recently, Quoceant designed, fabricated and qualified custom mooring connectors for Carnegie Clean Energy's CETO wave energy device. As part of the EuropeWave project, these connectors will enable CETO to be deployed off the north coast of the Basque Country.



“One of the things that sets the Quoceant team apart is our ability to deliver end-to-end projects – from initial concept and core innovation right through to build and qualification. Our Loanhead facilities, including a workshop and shared machine shop, allow us to rapidly prototype, test anything from quick functional demonstrators and tank test models all the way through to fully qualified hardware for deployment offshore.”

Richard Yemm,
Director, Quoceant



Leading the repowering charge

Since its inception, ReAmp has made significant strides in the renewable energy industry, delivering expert advice to wind, solar, grid and energy storage projects. The consultancy specialises in project design, feasibility studies, regulatory compliance, environmental assessments and advisory works, providing tailored technical guidance to renewable energy developers.

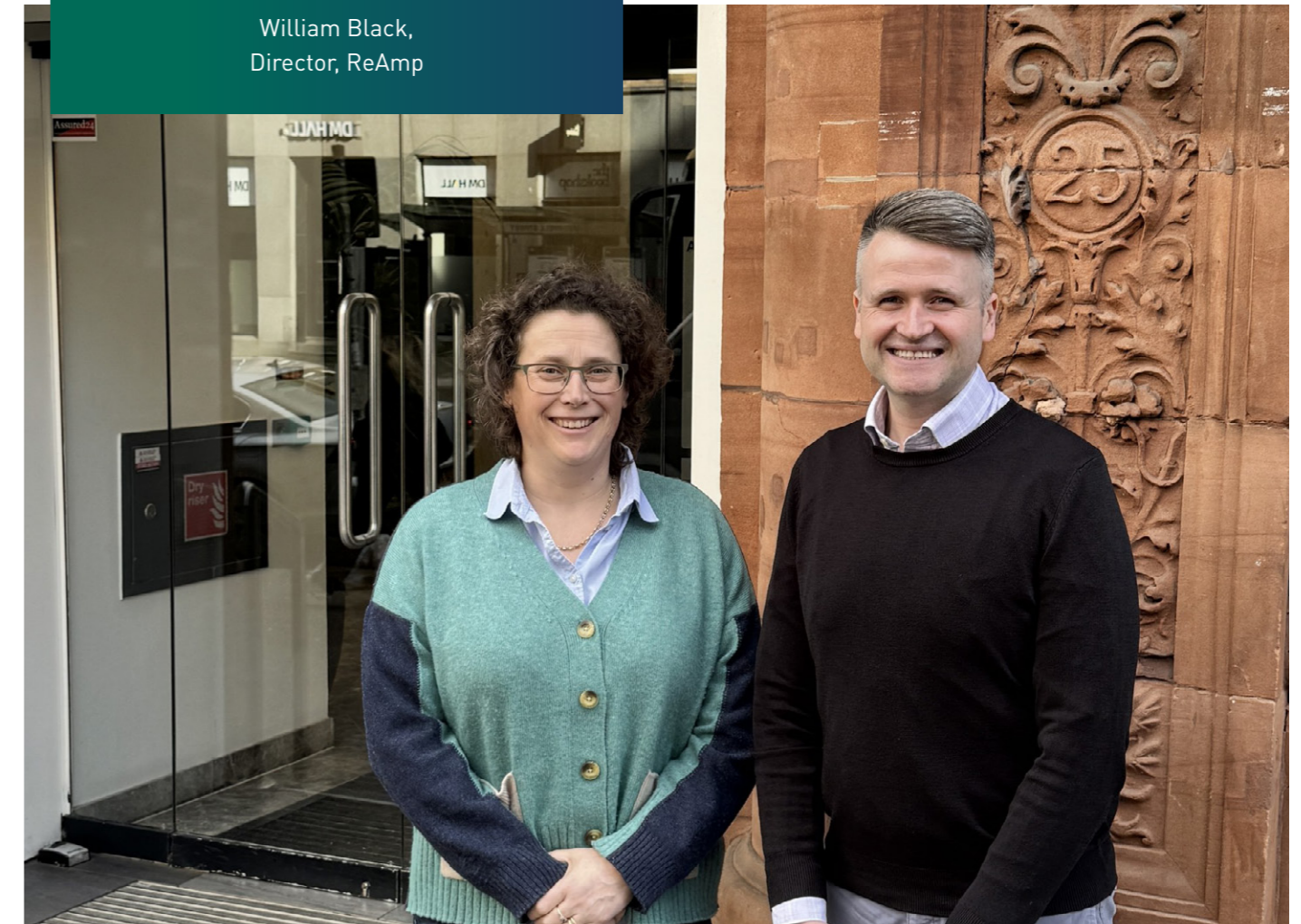
Recent success has seen ReAmp deliver several wind farm feasibility studies, advisory services and consenting strategies to clients while securing new contracts for wind energy projects in Scotland, England and Wales.

As repowering experts, the business is working to deliver planning and consenting advice for key projects, such as the Hare Hill onshore wind farm. What's more, in 2025, ReAmp completed a compliance review of the environmental impact assessment (EIA) for Glen Earrach Energy and was subsequently appointed to support full consent for the Loch Ness pumped storage hydro scheme. The company's work on the project will ensure compliance with EIA regulations as well as town and country planning laws, while working closely with the Scottish Government's Energy Consents Unit, preparing bespoke planning applications and engaging with the project's local community.

ReAmp's success is built on its commitment to quality and its ability to forge strong partnerships with local suppliers. By collaborating closely with stakeholders and local communities, the company enhances project outcomes while minimising environmental impacts.

“ReAmp delivers specialist, experience-driven advice built on decades at the forefront of renewable energy, particularly onshore wind, solar and pumped storage hydro. We're uniquely positioned to lead repowering activity, having been directly involved in many project sites when they were first constructed. Our business has grown steadily over the past year, and we're thrilled to open our new office in the heart of Glasgow's city centre.”

William Black,
Director, ReAmp





“Scottish Enterprise is proud to support Reblade via our High Growth Company Support programme. We believe the company has the potential to develop and deliver a highly innovative solution that will be a game-changer within the wind energy sector and create high-value jobs in Scotland.”

Leah Pape,
Head of High Growth Services,
Scottish Enterprise

REBLADE

Closing the materials loop through circularity

Reblade specialises in wind farm decommissioning and repowering, providing pioneering circular economy solutions to address the industry’s intricate end-of-life challenges.

Committed to supply chain sustainability and non-landfill destinations, Reblade offers a comprehensive, end-to-end service for wind asset owners and developers from planning support for both repowering and new wind projects to complete site decommissioning and recycling of composite blade waste material.

Based in Glasgow and Dumfries, the material management experts are at the forefront of addressing the composite material crisis, having established the UK’s first non-landfill disposal protocol for wind turbine blades, resulting in the diversion of hundreds of tonnes of composite waste from landfill. Instead, this material is recycled into new, certified products, making a vital contribution to full lifecycle sustainability and supporting net-zero targets through a circular material strategy for major repowering projects.

Focused on industrialisation, Reblade plans to expand its Scottish facilities for processing onshore and offshore end-of-life wind farm materials. The expansion is designed to close the material loop, establishing a complete circular wind service for the sector and ensuring assets are safely decommissioned with circularity as a priority. The approach offers wind farm operators an essential, auditable pathway for risk mitigation and enhanced local value creation when planning for decommissioning and repowering projects.



RENEWABLE PARTS

Blowing Scotland’s wind sector towards a world-class circular supply chain

For the past 15 years, Renewable Parts has been at the forefront of making the wind industry more sustainable in Scotland and beyond. From its Innovation Centre in Lochgilphead and Operations Centre in Renfrew, the company refurbishes and supplies critical turbine components, helping operators cut cost, risk and environmental impact in one move.

In 2024, Renewable Parts opened its first US facility in Texas, applying expertise developed in Scotland to strengthen local supply chains. The venture is going from strength to strength and is expanding the company’s global footprint.

Renewable Parts’ circular model keeps value in the Scottish supply chain. By refurbishing in-demand parts such as yaw brakes, pumps, motors and electrical components, the company provides an important alternative to the long

global lead times and volatile import costs of other suppliers. It is now expanding this approach into offshore wind, including a refurbishment order for 864 brake callipers that will return high-value hardware back into service rather than scrap. Customers benefit from shorter lead times, fixed pricing and predictable availability, which in turn supports higher turbine availability across Scottish fleets.

This year, Renewable Parts joined the 5% Club, a movement of UK employers who have committed to having at least 5% of their workforce in earn and learn positions, including apprenticeships and graduates on training schemes.

“Scotland has all the ingredients for a world-class circular supply chain: engineering talent, ambitious operators and a clear net-zero mandate. Our job at Renewable Parts is to turn that potential into day-to-day reality, proving that refurbish, reuse and reskill is not a slogan but a commercial strategy that cuts risk, creates careers and keeps value here at home.”

James Barry,
Chief Executive, Renewable Parts





RJ MCLEOD

Constructing the clean energy future

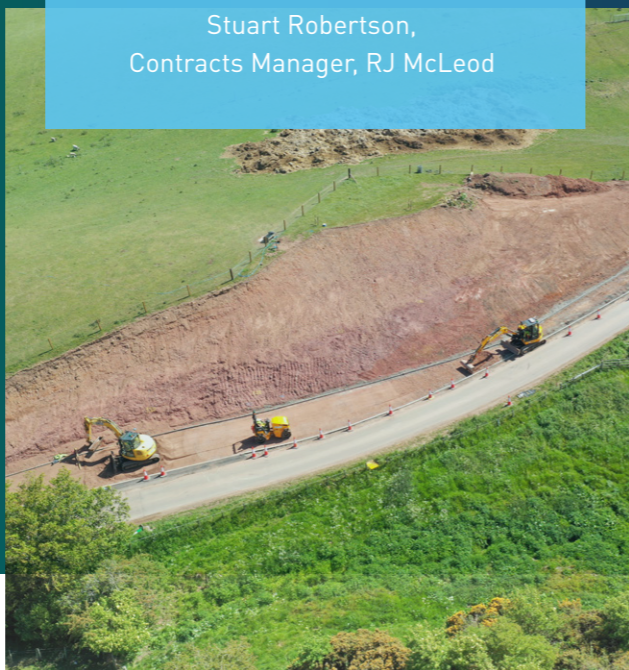
Leading civil engineering and building contractor RJ McLeod has played a central role in the delivery of Crystal Rig IV – one of Scotland’s largest onshore windfarms – where it began work in early 2025.

RJ McLeod has undertaken the Principal Contractor role for the Balance of Plant works, encompassing civil works for on- and off-site roads, hard standings, turbine foundations, control building and the electrical Balance of Plant works. In addition, the company’s contribution to the project has included delivering a series of technically challenging scope changes, including the redesign and construction of public road pinch points and associated off-site civil upgrades. These works demonstrate the company’s responsive and collaborative approach with the project team.

RJ McLeod provided vital operational support, including the maintenance, operation and fuelling of drainage pumps along the northern access route – critical for protecting infrastructure during construction. These activities were delivered in close collaboration with the client, demonstrating the company’s proactive approach to safeguarding assets, maintaining site resilience and ensuring safe, continuous operation.

“Crystal Rig IV has been a challenging yet highly successful project, delivered through strong collaboration with Fred. Olsen Renewables. Our team has worked proactively to overcome complex engineering and operational demands, ensuring safe and efficient progress throughout. We’re proud to have contributed to another key renewable energy asset that supports Scotland’s transition to a low-carbon future.”

Stuart Robertson,
Contracts Manager, RJ McLeod



SAMS ENTERPRISE

The devil is in the data: using advanced marine science to support sustainable development

SAMS Enterprise is the commercial arm of the Scottish Association for Marine Science, delivering innovative marine science solutions worldwide. Its marine energy work supports developers and regulators through advanced ecological monitoring, cutting-edge image analysis and leading marine mammal expertise, alongside robust metocean data analysis and modelling. Together, these capabilities help understand risks, streamline processes, reduce costly delays and optimise design and operations, delivering measurable financial savings while ensuring developments remain environmentally responsible.

SAMS Enterprise strengthens the offshore wind sector by applying advanced marine science to meet the practical needs of developers, regulators and supply-chain partners. Recent work includes:

- Passive acoustic monitoring assessments of marine mammals
- Image-based analysis of marine growth and biodiversity
- Oceanographic modelling that supports sustainable development and long-term operational planning.



By combining sensor technologies, data-driven analytics and specialist ecological expertise, SAMS enterprise helps clients reduce operational and financial risks as well as environmental uncertainty.

Key achievements include multi-disciplinary ecological field campaigns, modelling outputs that inform turbine turbulence and stratification impact, nature compensation projects and independent scientific advice that enhances the robustness of environmental impact assessments. These contributions give offshore wind developers greater confidence in investment decisions while strengthening environmental stewardship across the sector.

Looking ahead, SAMS Enterprise plans to expand its role in offshore wind by advancing autonomous systems for long-duration monitoring, enhancing image analysis, further understanding of compensatory initiatives and deepening collaboration with industry on nature-positive design and eDNA applications. Its ambition is to remain a trusted scientific partner, enabling responsible and efficient growth of renewable energy.

“SAMS Enterprise serves as a trusted scientific partner to the offshore wind industry, translating research into actionable insights. By combining expertise, technology and collaboration, we support sustainable growth and reduce project risk, ensuring that renewable energy development benefits both people and marine ecosystems.”

Daniel Carcajona,
Business Development Manager,
SAMS Enterprise



Export expansion: taking Scottish survey solutions across the globe

Headquartered in Glasgow, Sulmara is a marine geophysical company providing an innovative approach to surveying for global offshore wind projects.

For Ocean Winds' BCWind project in Poland, Sulmara deployed its innovative 'Discover' technology onto a traditional offshore vessel. This acoustic technology complements existing detection of potential unexploded ordnance (UXO), significantly reducing the number of targets requiring inspection, while simultaneously mapping buried geohazards.

By integrating traditional offshore assets with innovative technology, Sulmara not only demonstrates a commitment to sustainability but also shows how existing oil and gas infrastructure can be repurposed for the renewable energy sector.

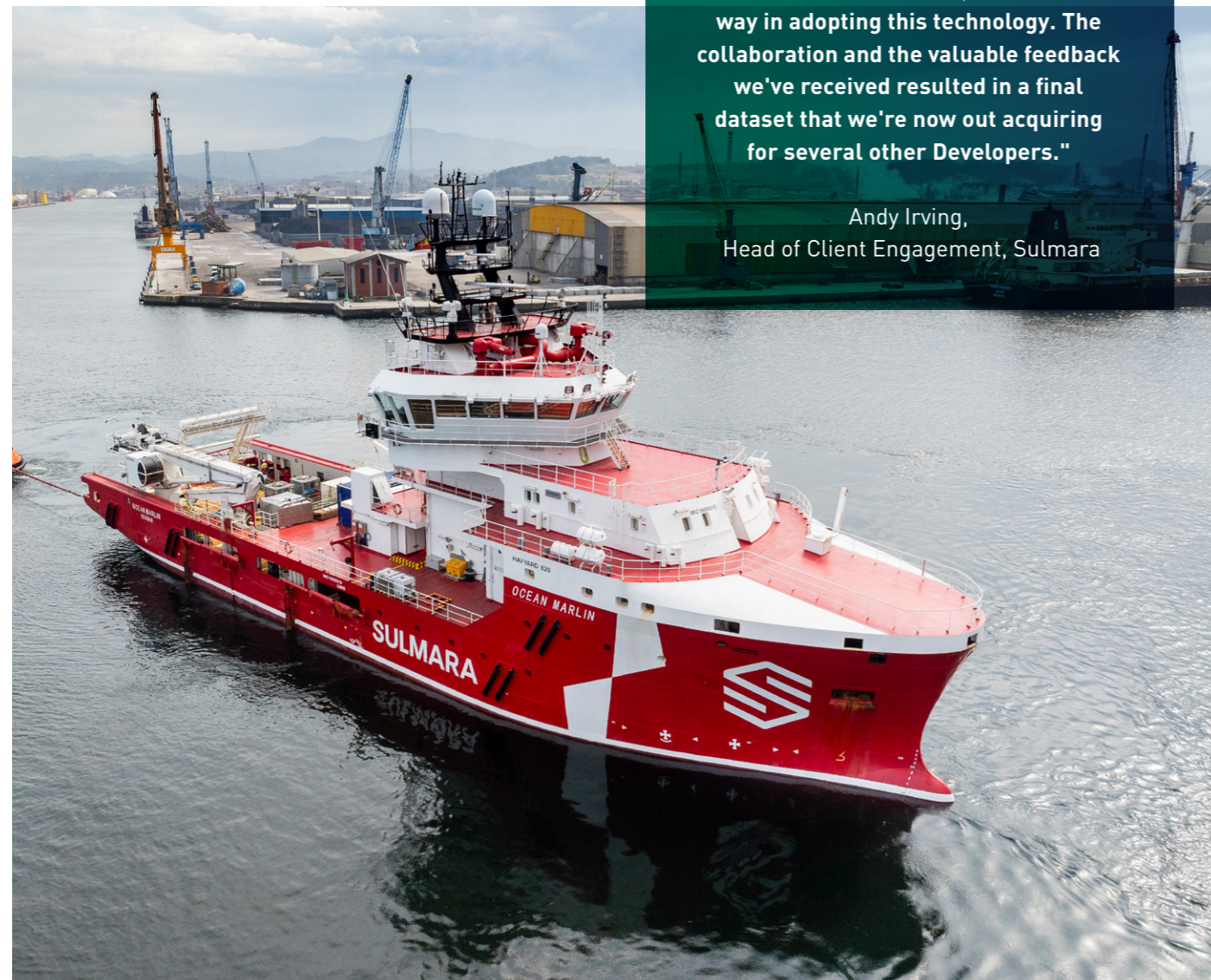
Exporting this Scottish-developed approach to offshore wind markets across Europe and Asia highlights Sulmara's expertise in delivering innovative survey solutions and its role as a Scottish export supplier in the energy transition.

As a result of this growth, Sulmara has rapidly expanded over the past year, opening new offices in Bristol, Norwich and Taiwan, and relocating its Glasgow headquarters to larger premises. The company's workforce has grown by 25% to 250 employees.

In recognition of its work, Sulmara was awarded the Innovation in Business Award at the Glasgow Business Awards 2025.

"Our Discover technology stack is showing that investment in survey at the front end of the project lifecycle enables demonstrable cost savings and environmental impact reductions through the construction phase. Our thanks to Ocean Winds, who led the way in adopting this technology. The collaboration and the valuable feedback we've received resulted in a final dataset that we're now out acquiring for several other Developers."

Andy Irving,
Head of Client Engagement, Sulmara



TAC HEALTHCARE

Keeping the renewable energy workforce safe

TAC Healthcare specialises in medical resourcing, 24/7 duty doctor access and comprehensive occupational health services. Its multidisciplinary team includes Faculty of Occupational Medicine physicians, chartered hygienists, psychotherapists, physiotherapists and occupational health advisors.

TAC's skilled team is supported by a bespoke occupational health software package (iOH) developed in collaboration with energy-sector clients, which delivers efficient and reliable support, helping organisations maintain a compliant, safe and productive workforce.

With extensive experience supporting the energy sector, TAC Healthcare continues to expand its renewable energy operations by investing in medical protocols aligned with Global Wind Organisation (GWO) requirements. Working across the UK and Europe, TAC provides remote medics for offshore wind construction sites, supported by a 24/7 duty doctor service.



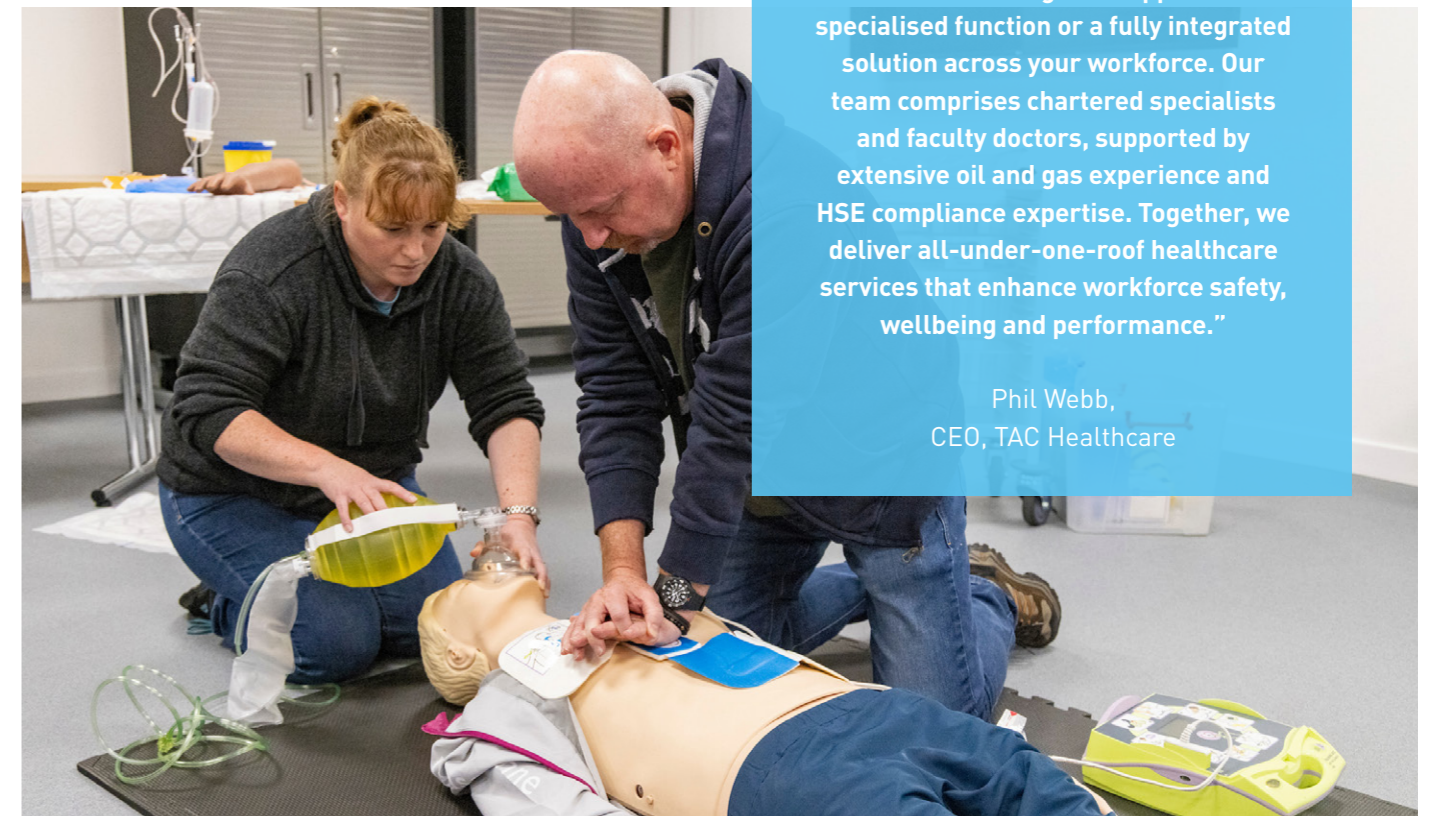
This service gives onsite medics immediate senior clinical input and ensures that the required equipment, drugs and consumables are available and aligned to the project's risk profile and location. The tailored model strengthens onsite medical capability during the construction phase, supports earlier intervention and helps reduce avoidable escalations while maintaining patient safety.

Between January and December 2025, TAC Offshore Medics recorded 248 sickbay encounters across four renewable energy assets, supported by 89 topside medical calls. The company's effective escalation management enabled 93.1% of cases to be managed onboard without the need for evacuation.

"We understand that every organisation in the renewable energy sector has unique challenges, priorities and ambitions. That's why we create tailored partnerships to meet your specific needs

– whether it's targeted support for a specialised function or a fully integrated solution across your workforce. Our team comprises chartered specialists and faculty doctors, supported by extensive oil and gas experience and HSE compliance expertise. Together, we deliver all-under-one-roof healthcare services that enhance workforce safety, wellbeing and performance."

Phil Webb,
CEO, TAC Healthcare





TERNAN ENERGY

Overcoming challenges with award-winning geoscience

Ternan Energy is an engineering consultancy specialising in geoscience services. The company helps its clients to understand the characteristics of offshore projects and to manage and mitigate the associated risks that come with them.

From its offices in Aberdeen and Edinburgh, Ternan Energy has expanded its services to international clients and their projects whilst managing its core UK market. Notable examples from the last 12 months include:

- Cable burial risk assessment for Ocean Winds on BC-Wind in Poland
- Geotechnical foundation engineering support to CorPower Ocean in Portugal
- Site investigation survey support to Vattenfall and Copenhagen Offshore Partners on Zeevank in the Netherlands
- Cable route engineering for EnBW and JERA Nex bp on Mona and Morgan in Scotland
- Geotechnical review for SSE on Dogger Bank C in England.

In July 2025, Ternan Energy was awarded Consulting Firm of the Year at the Ground Engineering Awards, which recognise excellence across the geotechnical engineering sector and celebrate firms that demonstrate technical innovation as well as positive contributions to the industry. In July 2025, Aggeliki Georgiopolou, Geoscience Manager at Ternan Energy, won the Technical Excellence Award at the Inspiring Women in Engineering Awards 2025. A recognition that celebrates Aggie's outstanding contribution to marine geoscience and her ability to combine deep technical expertise with innovative problem-solving.

“Whilst it has been a challenging time in the offshore renewable energy industry, our team has still managed to provide the expert support developers need to move their projects forward and being active in more markets has allowed us to maintain our upward trajectory. Despite the challenges, the team’s resilience has put us in a good place to tackle whatever the next 12 months throws our way.”

Mark Finch,
CEO & Founder, Ternan Energy

TERRA MECHANICA MARIS

Perfectly managed projects

Terra Mechanica Maris specialises in offshore drilling support, mechanical maintenance and fabrication for the renewable energy industry. Operating from the Scottish Borders, it delivers solutions for complex marine and offshore projects, combining defence-grade engineering standards with practical field experience to support developers and tier 1 contractors across the growing clean energy supply chain.

The engineering company is contributing directly to Scotland’s offshore wind industry by providing on-site operational and mechanical expertise through its assistant offshore management for Acteon’s drilling and casing installation works. Operating as part of the project’s core offshore management team, Terra supports day-to-day drilling operations, coordinates mechanical maintenance and oversees troubleshooting and fault resolution on critical subsea and topside equipment. This ensures safe, continuous progress when foundations are being installed and strengthens the overall resilience of operations. The suppliers’ specialist project management expertise improves equipment availability, supporting planned and reactive maintenance, while ensuring contractor interfaces and task execution are tightly controlled during high-risk phases of the operation.



This project-led offshore delivery is backed by a Scottish workshop, where it continues to build internal capability in fabrication, machining and mechanical testing to support future renewable energy projects. Terra Mechanica Maris remains focused on developing engineering capacity in Scotland while supporting major offshore wind activities through reliable, on-site operational leadership.



“Supporting Acteon and Menck offshore lets us demonstrate the level of operational discipline and engineering capability Scotland can deliver. Alongside maintaining safe, continuous drilling and casing operations, we’re developing Terra Ancora – a fully mechanical subsea anchor system designed to strengthen Scotland’s supply chain with practical, field-ready engineering.”

Garry McGowan,
Marine Operations Director,
Terra Mechanica Maris

TONY GEE & PARTNERS



Ground investigation for a greener future

Tony Gee & Partners is a leading engineering consultancy, specialising in civil, structural and geotechnical design.

The company is renowned for tackling complex challenges in renewable energy. With decades of experience, Tony Gee has delivered major onshore and offshore wind projects, providing expertise in ground investigations, geotechnical design and advanced 3D modelling. Its innovative approach optimises construction strategies to reduce costs, mitigate risks and minimise environmental impact. Committed to sustainability and engineering excellence, Tony Gee is driving the transition to a low-carbon future through practical, forward-thinking designs.

The consultancy has supported civil infrastructure design on 46 Scottish wind farms, with the combined capacity of 3.8GW. Its largest project to date is the 103-turbine Viking wind farm in Shetland, with a total capacity of 443MW.

Working alongside SSE Renewables, Tony Gee developed and managed a multi-phased approach for its most extensive onshore wind farm ground investigation campaign, carefully balancing cost efficiency and ground risk.

Using advanced 3D modelling of the civil infrastructure, the campaign delivered an optimised earthworks strategy which decreased the use of concrete by 30% and the use of steel reinforcement by 22% for each turbine foundation. What's more, the approach eliminated 86,500m³ of peat excavation during the public road design, significantly reducing the environmental impact of construction.

"At Tony Gee & Partners, we combine innovation with practical engineering expertise to deliver renewable energy solutions that are not only cost-effective and low risk but also environmentally responsible. Our commitment to sustainability drives us to create designs that optimise performance, minimise impact and support the global transition to clean energy. Every project reflects our vision of engineering excellence for a greener, more resilient future."

Peter McDonald,
Head of Power & Energy,
Tony Gee & Partners



THANK YOU

to this year's Supply Chain Impact Statement case study contributors



INDUSTRY GROUPS

THE SCOTTISH OFFSHORE WIND ENERGY COUNCIL

The Scottish Offshore Wind Energy Council (SOWEC) is a partnership between the Scottish public sector and the offshore wind industry, co-chaired by Gillian Martin MSP, Cabinet Secretary for Climate Action and Energy, and Claire Mack of Scottish Renewables. SOWEC's mission is to coordinate and grow the sector, ensuring the Scottish offshore wind industry is more sustainable, competitive and commercially attractive, both domestically and globally.

By bringing partners together in a collaborative approach, SOWEC aims to create holistic solutions to challenges and maximise the positive impact of opportunities for the whole of Scotland. Through its subgroups and workstreams it plans and delivers practical interventions, facilitates collaboration and provides insight and advice to drive forward the offshore wind sector in Scotland.



THE STRATEGIC INVESTMENT MODEL

The Strategic Investment Model (SIM) process has closed, though 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.

SIM demonstrated the art of the possible, spotlighting innovative projects, strengthening market visibility and accelerating pathways to both private and public investment. Several initiatives that gained early exposure through the programme have since progressed with support from Scotland's enterprise agencies and wider funding mechanisms, reinforcing confidence in Scotland's industrial and supply chain potential.

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.

SIM's formal conclusion marks not an endpoint, but a transition, with supported projects continuing to advance through established investment and enterprise channels.



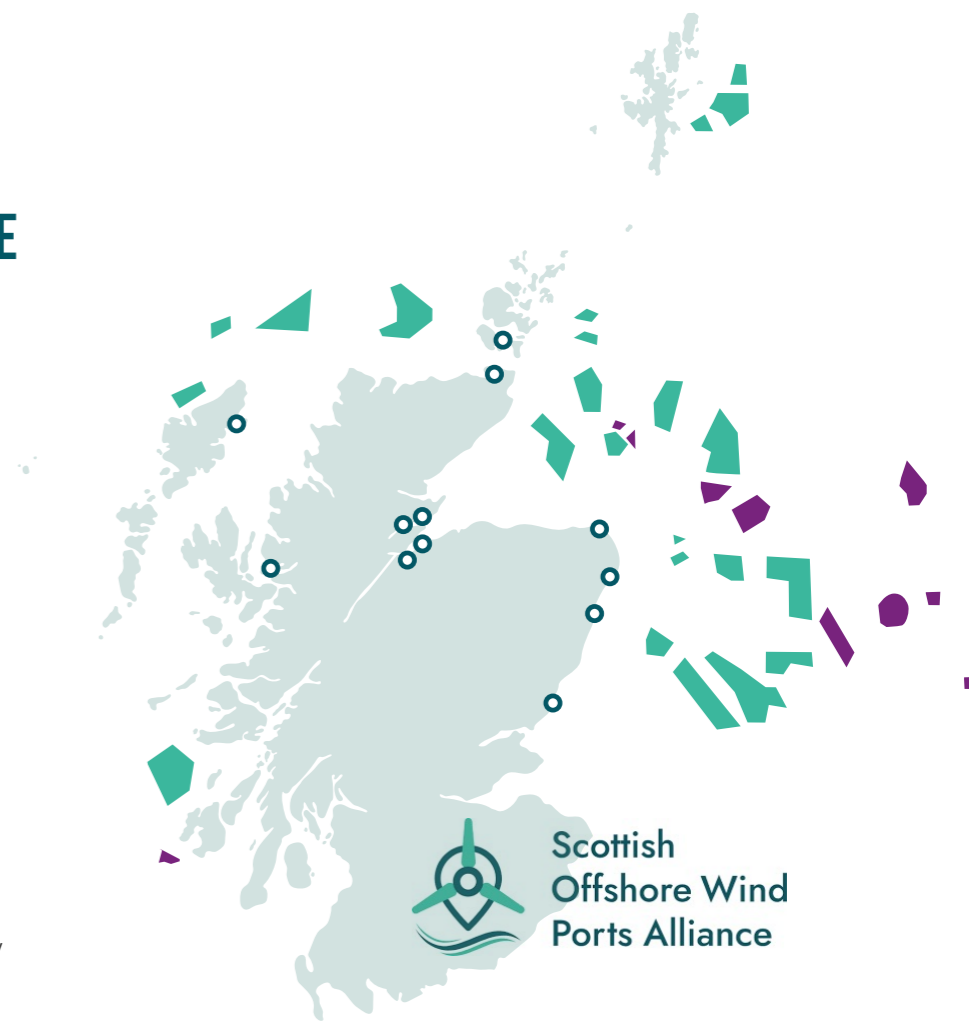
ENTERPRISE AGENCIES

Scottish Enterprise, Highlands and Islands Enterprise and South of Scotland Enterprise are key development agencies that support businesses to innovate and scale by fostering research and development, international investment and economic development.

THE SCOTTISH OFFSHORE WIND PORTS ALLIANCE

The Scottish Offshore Wind Ports Alliance (SOWPA) is a progressive and collaborative forum of the country's leading port locations and enabling infrastructure facilities, targeted at optimising the opportunities from offshore wind.

SOWPA is actively developing opportunities to enhance regional competitiveness, drive efficiencies and fast-track the required expertise to support the UK's burgeoning offshore wind industry. This will be achieved by optimising largescale operations and addressing common & complex industry challenges through knowledge sharing and collaboration.



- **ScotWind**
Scottish leasing round for offshore wind and floating offshore wind developments.
- **INTOG**
Innovation and Targeted Oil and Gas leasing round aimed at the electrification of offshore oil and gas infrastructure.
- **Ports**
SOWPA Locations



JOIN SCOTTISH RENEWABLES

Scottish Renewables is the voice of Scotland's renewable energy industry and is committed to realising the full economic, social and environmental benefits of renewable energy for the country. We invite you to join our business network and make your voice heard through the work we do on behalf of our members.

SCAN FOR MORE INFORMATION



AWARD WINNING SUPPLIERS

Scotland continues to lead the renewable energy sector, showcasing an innovative and dynamic supply chain of companies that are driving sustainable technology forward. Many of these pioneering organisations have been recognised with Scottish Renewables awards, highlighting commitment to green energy innovation.

Our commitment remains strong: celebrating the remarkable achievements of Scotland's renewable energy professionals and continuing to showcase their groundbreaking contributions to a sustainable future.

THE SCOTTISH GREEN ENERGY SUPPLY CHAIN AWARDS 2025

 GREEN ENERGY SKILLS AWARD Story Contracting	 SUSTAINABLE SUPPLIER AWARD Port of Aberdeen	 OUTSTANDING SME AWARD Fennex
 GREEN BUSINESS GROWTH AWARD Renewable Parts	 BEST PRACTICE AWARD Integrity HSE	 TECHNOLOGY & BUSINESS INNOVATION AWARD Xocean

THE SCOTTISH GREEN ENERGY AWARDS 2025

 CARBON REDUCTION AWARD Diversity Energy Solutions	 OUTSTANDING SERVICE AWARD H&MV Engineering	 JUDGES AWARD Scottish Association for Marine Science
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UPCOMING EVENTS 2026/27

SCAN FOR MORE INFORMATION AND TO **BOOK NOW**





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