



# Insight Briefing: ScotWind Projects

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## Executive Summary

ScotWind projects, including West of Orkney and Muir Mhòr, are now largely in consent and pre-FID stages, with one major new risk signal (West of Orkney pause over grid charges) but still no full FIDs or main construction EPC/EPCI awards as of late January 2026.

### Scope and latest status

- The ScotWind round reached a peak of 32.3 GW but now stands at around 29.3 GW of live capacity after Shell handed back the 3 GW CampionWind lease.
- Nineteen projects remain live, with one (West of Orkney) fully consented and at least five others (Ossian, Caledonia, Muir Mhòr, Buchan, MarramWind) having submitted planning applications by January 2026.
- The Scottish Government's January 2026 policy update confirms Muir Mhòr as a 1,005 MW floating ScotWind project within the national pipeline.

### West of Orkney Windfarm

- West of Orkney (c. 2 GW, 125 turbines, first power target around 2030) was the first ScotWind project to secure both onshore planning permission in principle and offshore consent, giving it full consent coverage.
- Onshore works include grid-connection infrastructure in Caithness linking into a new subsea cable route to Lincolnshire, underpinning export of power to the English network.
- In January 2026, the developers announced a pause in further investment, warning that “unfair” electricity transmission charges make the project unviable in its current form; around £100 million has already been spent and the team has been reduced while the consortium seeks a viable market pathway.

- Public commentary highlights earlier ambitions for up to £1 billion of Scottish supply-chain work and a £140 million supply-chain and port infrastructure action plan tied to the project, but these are now at risk while the pause remains in place.

### **Muir Mhòr floating wind**

- Muir Mhòr (about 1 GW floating wind, ~63 km off the east coast near Peterhead) is a 50/50 joint venture between Vattenfall and Fred. Olsen Seawind.
- Aberdeenshire Council granted onshore planning permission in principle in mid-2025 for the grid-connection cables and substation, making it the first floating ScotWind project to secure onshore consent.
- The offshore consent application was submitted at the end of 2024 and remains under consideration by the Scottish Government; if approved, the project targets generation in the early 2030s.
- The project positions itself as a pathfinder for large-scale floating wind, with a dedicated “Our Supply Chain” portal committing to collaborative engagement with Scottish suppliers as it moves into detailed design and procurement.

### **Other ScotWind planning and FID signals**

- Offshore Wind Scotland’s tracker (updated January 2026) notes that, beyond West of Orkney, at least five projects have lodged planning (Section 36/marine) applications: Ossian, Caledonia, Muir Mhòr, Buchan, and MarramWind.
- ScottishPower Renewables has submitted both onshore and offshore consent applications for the 3 GW MarramWind floating project, signalling a move into advanced development and pre-FID design.
- A Norwegian Offshore Wind briefing in late 2025 describes ScotWind’s floating portfolio at roughly 19.2 GW, with projects “approaching offtake agreements, final investment decisions (FIDs), and consequently, large-scale procurement,” but without naming any project that has yet taken FID.

### **Procurement, supply chain and construction activity**

- Crown Estate Scotland has published Supply Chain Development Statement (SCDS) outlooks for ScotWind projects, setting out high-level commitments on UK and Scottish content, port, fabrication and manufacturing plans, but these remain strategic rather than specific tender notices.
- Muir Mhòr’s supply-chain portal emphasises early engagement, transparency and innovation, inviting expressions of interest from fabricators, ports, vessel operators and service providers as it prepares its contracting strategy.

- Commentary from Scottish and Norwegian industry bodies stresses that key procurement will ramp as projects secure CfD AR7 contracts and then FID, with AR7 reforms (phased CfDs, clean industry bonuses, floating-specific rules) designed to unlock investment and supply-chain build-out.
- Current physical activity across ScotWind remains dominated by surveys, site investigations and design work; no full-scale offshore construction (foundation installation, array/OSS installation) has yet commenced on ScotWind sites as of January 2026.

### **Keeping you up-to-date**

Our regular briefing note will keep you informed about the latest developments in this area including:

- Regulatory:
  - New Section 36 / marine licence applications lodged or validated for any ScotWind site (Offshore Wind Scotland tracker, Marine Directorate portal).
  - Consent decisions (onshore planning permissions, offshore consents) and any appeals or conditions.
- Commercial / FID signals:
  - CfD AR7 qualification and bid announcements for ScotWind projects, especially West of Orkney, Muir Mhòr, Ossian, Caledonia, MarramWind and Buchan.
  - Public statements on project pauses, restructuring, or changes in partners (e.g. West of Orkney grid-charge driven pause, ChampionWind lease relinquishment).
- Procurement and supply chain:
  - Updates to each project’s own “supply chain” or “contracts” pages (e.g. Muir Mhòr “Our Supply Chain”) for new RFIs, market engagement events, pre-qualification launches and early Tier-2/3 packages.
  - Cluster and developer events (meet-the-buyer, capability mapping) flagged by Offshore Wind Scotland, Norwegian Offshore Wind, and regional chambers which often pre-date formal tenders.

### **Sources Used**

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