



Insight Briefing: Capability Benchmarking – Blowing in the Wind?

Prepared: February 19th 2026

For: ExportCentral AI: North East Scotland Energy Supply Sector

Geographic Focus: Global

Report Period Covered: February 2026

Executive Summary

The past twelve months have witnessed unprecedented activity in global offshore renewable energy markets, with major project announcements, auction results, and policy developments across all continents.

In our previous [Insight Briefing](#) we presented a comprehensive list of major offshore renewable energy announcements worldwide from February 2025 to the present, organised by region and technology type. The document included auction results, Final Investment Decisions, planning consents, policy developments, infrastructure investments, and technology milestones across Europe, Asia Pacific, Americas, Middle East, and emerging markets. Complete with detailed project specifications, capacity figures, timelines, investment amounts, and full citations.

In this follow up Briefing we present an initial evaluation of the North East Scotland (NES) energy supply chain's capabilities benchmarked against these rapidly emerging global market opportunities. This is a complicated area so please consider the paper to be a "starter for ten". Future Insight Briefings will examine in more detail. The focus is on capability matching covering Tier 2 and Tier 3 supply chain companies.

Our initial analysis highlights a good but uneven fit between the major offshore renewable announcements made over the last year and the core capabilities of Tier 2 /Tier 3 NES energy supply chain companies. The fit is strongest when the opportunity looks like "offshore oil & gas plus scale and repetition" but is weaker where there is a need for industrialised manufacturing at Tier 1 scale or fully productised, export-ready offerings.

Three main capability matching categories can be identified - where the fit is strong, where it is partial, and where NES SMEs will struggle unless they change how they position and collaborate.

1. Where the Fit is Strongest

These are opportunity areas where NES Tier 2/3 firms already have deep competence (engineering, marine, subsea, project delivery) and where developers and Tier 1s have a known interest in Scottish content.

Balance-of-plant and marine operations

Strong fit to existing oil & gas derived skills and assets:

- Offshore construction support: marine operations, lifting and installation engineering, temporary works, moorings, anchors, subsea structures, and terminations are core strengths in the NES cluster.
- O&M and life-extension: inspection, repair and maintenance (IRM), subsea integrity, coating, NDT, rope access, and specialist diving are all areas with mature Tier 2/3 capability in the region.
- Decommissioning: NES has the UK's strongest offshore decommissioning ecosystem; the same vessels, yards and engineering can be repurposed for end-of-life and repowering of wind, tidal and hybrid assets.

Implication: *The global projects listed in our previous [Insight Briefing](#) provide exponential growth opportunities for NES SMEs who are already competitive in these areas. The challenge is route-to-contract, not technical capability.*

Floating wind – moorings, subsea, ports

The Celtic Sea awards, ScotWind floating projects and international floating pipelines align closely with NES supply chain strengths.

- Mooring design and fabrication, chain and synthetic rope handling, and subsea connectors: these map directly to long-standing subsea engineering capabilities in the region.
- Port operations and wet storage: skills in heavy-lift logistics, marshalling, and quayside operations (Nigg, Cromarty, Aberdeen) are directly relevant to floating assembly and maintenance.
- Specialist engineering consultancies: concept development, FEED, and problem-solving for novel floating systems are exactly where NES engineering houses already play for oil & gas and prototype renewables.

Implication: *For Tier 2/3 firms prepared to standardise offerings (e.g. “floating mooring turnkey package” rather than pure manpower), global floating awards are highly addressable.*

Offshore hydrogen pilots and hybrid projects

Offshore hydrogen and power-to-X projects (e.g. HOPE, AquaVentus) depend heavily on offshore project and subsea integration skills that NES SMEs have in abundance.

- Subsea cables, umbilicals, and pipe handling are areas where Scottish and NES firms already operate globally.
- Control systems, monitoring, and digital twins for offshore platforms are also familiar capabilities in the regional tech ecosystem.

Implication: *The projects are new, but the underlying work-packages (platforms, pipelines, cables, controls) are familiar; NES Tier 2/3 firms can pivot faster than “greenfield” competitors.*

Tidal stream – Morlais and follow-ons

UK tidal build-out (e.g. Morlais) favours smaller, innovative, engineering-centric suppliers.

- Prototype device support, test rigs, foundations, and balance-of-plant fit directly with NES subsea and fabrication SMEs.
- Grid and onshore works: civil, electrical and substation work are within the capabilities of many regional Tier 3 contractors.

Implication: *For firms seeking to stay closer to home but still build exportable credentials, tidal and wave provide a good match with limited extra capability build.*

2. Where the Fit is Partial and Needs Repositioning

In these areas, NES Tier 2/3 capabilities are technically relevant but not yet packaged in a way that Tier 1s and developers buy at scale.

Serial manufacturing and high-volume components

The large global pipeline projects (AR7, Poland, APAC, US East Coast) demands industrialised, high-throughput manufacturing.

- NES has fabrication, machining, castings and coatings capability, but much of it is configured for bespoke, project-based oil & gas work rather than standardised, high-volume wind components.
- Port-adjacent heavy manufacturing is being targeted by SIM and ScotWind investment, but much of the current focus is on large Tier 1 plants (towers, XXL foundations), not smaller Tier 2/3 components.

Fit:

- *Good for niche or higher-value components (specialist steelwork, secondary structures, cable accessories, lifting equipment) where batch size is modest and engineering content is high.*
- *Weaker for commodity foundations, towers or blade manufacturing, unless NES firms move up in scale or into joint ventures.*

International project export (Poland, US, APAC, LatAm)

NES companies are well-placed technically to support Poland’s first offshore wind wave, US construction, and APAC floating roll-outs. But constraints include:

- *Route to market: most Tier 2/3 NES companies sell domestically via existing relationships; relatively few have dedicated international BD focused on developers and EPCs in new markets.*
- *Contracting and risk: global developers and Tier 1s push risk (LDs, interface risk, multi-currency exposure) down the chain, which can be difficult for smaller balance sheets.*

Fit:

- *Strong where NES firms can piggy-back on Scottish/UK Tier 1s exporting (e.g. cables, heavy lift, major EPCs that already know them).*
- *Partial where direct contracting with foreign developers is required, unless Export Support Agencies can help.*

3. Where the Fit is Currently Weak for Most Tier 2/3 NES Firms

These are opportunity areas that are attractive but require major strategic shifts, capital, or partnering.

Full OEM-level products (turbines, blades, major platforms)

- *Utility-scale turbine manufacture remains dominated by a handful of OEMs; NES does not have a turbine OEM base.*
- *Large-scale blade, nacelle and tower factories are being anchored in a small number of ports and clusters, often backed by OEM capital and national industrial policy (e.g. Humber, Teesside, APAC hubs).*

Implication: *NES Tier 2/3 firms may be better off targeting sub-systems, tooling, jigs, service and modular elements around these OEMs than attempting to compete head-on.*

Fully integrated “Tier 1-like” EPC offers

- To capture the biggest margins on the new projects (large EPCI packages, multi-GW cluster work), firms need scale, balance sheet strength, and integrated offerings across many disciplines.
- Most NES Tier 2/3 firms remain specialised and relatively small, making it hard to qualify for high-value contract frameworks without being part of a consortium.

Implication: *The opportunity is to form structured alliances or “Virtual Tier 1s” around specific niches (e.g. floating moorings, export cable landfalls) rather than to stretch individual SMEs beyond their capacity.*

4. Strategic Implications for NES Tier 2 /Tier 3 Firms

From a senior-executive, business-first perspective, the global announcements shift the questions from “Is there enough work?” to “Can we match what we sell, how we sell and deliver it, to what and how buyers want to buy?”

Where to double-down (good capability–opportunity match)

- Marine operations and subsea services for global fixed and floating projects (North Sea, Celtic Sea, Poland, US East Coast, APAC).
- Floating wind mooring systems, subsea hardware, and port-based assembly and wet storage.
- Offshore hydrogen demonstrators and hybrid assets (exporting offshore project execution expertise into a new technology domain).
- Tidal and wave projects as a near-shore test-bed to build a track record and IP that can then be exported.

Where to selectively invest and partner (partial fit)

- Move from “time and materials” engineering to repeatable products and services (standard packages, catalogues, framework agreements) suited to serial build.
- Build structured relationships with Scottish ports and ScotWind developers via SOWEC, SIM, DeepWind and the Forth & Tay clusters to get earlier line of sight on packages and qualification requirements.
- Develop export-oriented business development (local agents, framework participation, joint ventures) into 2–3 priority markets that best mirror NES conditions (e.g. East Coast US, Poland, selected APAC markets).

Where to be cautious (weak fit without major change)

- Trying to win highly commoditised, volume-driven component manufacture without cost and scale advantages.
- Taking on disproportionate contractual and financial risk in unfamiliar jurisdictions to chase headline project sizes.

5. What this Means in Practice for a Typical NES Tier 2/3 Firm

For a CEO/MD in the NES supply chain, the global announcements listed in our previous [Insights Briefing](#) mean:

- There is ample demand for what you already do well (marine, subsea, engineering, specialist fabrication), but access will increasingly be via structured frameworks, industrial clusters and global Tier 1s.
- The competitive edge will come from how you package and de-risk your offer (standardisation, proven HSE, bankable performance) rather than from pure technical prowess.
- To turn these projects into growth, you likely need a small number of deliberate bets: one or two technology niches (e.g. floating, hydrogen, tidal) and one or two export geographies, rather than trying to chase everything everywhere.

Please do not hesitate to contact us if you would like help in mapping your company's current capabilities benchmarked against the emerging opportunity landscape - identifying concrete growth plans to follow.

As always, comments and feedback are very welcome.

Jim H

Sources

1. <https://evidencehub.northeast-ca.gov.uk/downloads/588/north-east-offshore-wind-supply-chain-final-report-april-2020.pdf>
2. <https://investaberdeen.co.uk/uploads/North East Scotland Offshore Wind.pdf>
3. <https://nngoffshorewind.com/supply-chain/>
4. <https://www.gov.scot/publications/case-studies-support-scenario-mapping-offshore-renewable-energy-development-economic-benefits/pages/8/>
5. <https://www.offshorewindscotland.org.uk/media/12948/supply-chain-and-clusters-roadmap-2021-22.pdf>
6. <https://www.offshorewindscotland.org.uk/the-scottish-offshore-wind-industry/clean-energy-cluster-supply-chain/>
7. <https://www.offshorewindscotland.org.uk>

8. <https://www.ramboll.com/net-zero-explorers/offshore-hydrogen-at-scale>
9. <https://www.rwe.com/en/research-and-development/hydrogen-projects/aquaventus/>
10. <https://www.sdi.co.uk/trade/energy-and-low-carbon-companies/offshore-wind-energy-companies>
11. <https://www.offshore-energy.biz/new-uk-tidal-energy-capacity-what-we-know-so-far/>
12. <https://www.renewableuk.com/energypulse/blog/global-offshore-wind-pipeline-in-2025-a-year-in-review/>
13. <https://www.gov.uk/government/news/record-breaking-auction-for-offshore-wind-secured-to-take-back-control-of-britains-energy>
14. <https://www.offshorewindscotland.org.uk/media/0jph2gy4/se-marramwind-slides-v1.pdf>
15. <https://www.offshorewindscotland.org.uk/news/2024/february/20/sim-projects-published-highlighting-offshore-wind-sector-priorities-for-supply-chain-and-infrastructure/>
16. <https://assets.publishing.service.gov.uk/media/5a75984c40f0b67f59fce1c4/bis-14-578-offshore-wind-supply-chain-capabilities-and-opportunities.pdf>
17. <https://www.offshorewindscotland.org.uk/media/11940/strategic-investment-assessment-report-august-2021.pdf>
18. <https://www.airswift.com/blog/offshore-wind-projects-asia>
19. <https://www.gwec.net/news/latin-america-must-strengthen-its-wind-energy-supply-chain-to-capture-a-once-in-a-generation-growth-opportunity-finds-new-gwec-report>
20. <https://www.offshorewindscotland.org.uk/media/12628/sowec-guide-for-scottish-exporters.pdf>
21. <https://www.offshorewindscotland.org.uk/media/12631/bvga-terms-and-conditions-report.pdf>
22. <https://www.renewableuk.com/media/1xdbwy1l/rukowic-offshore-investment-guide-digital.pdf>
23. <https://www.dnv.com/news/2026/solar-and-wind-capacity-in-mena-set-for-tenfold-growth-by-2040-dnv-report-finds/>
24. https://www.scottishrenewables.com/assets/000/002/337/SR_SUPPLY_CHAIN_2PP_v7_original.pdf
25. Quality Customer Growth Programme pdf – available on request.
26. <https://www.offshorewindscotland.org.uk/the-scottish-offshore-wind-industry/sowec/sowec-publications/>
27. <https://www.offshorewindscotland.org.uk/media/11937/bvga-local-content-roadmap.pdf>
28. <https://www.offshorewindscotland.org.uk/the-scottish-offshore-wind-industry/ports-and-harbours/>
29. <https://www.renewableuk.com/our-work/supply-chain/>
30. <https://www.offshorewindscotland.org.uk/the-scottish-offshore-wind-industry/sowec/>

31. <https://www.offshorewindscotland.org.uk/news/2025/october/27/sim-confirms-transition-plan-following-successful-completion-of-stage-2/>
32. <https://www.renewableuk.com/our-work/supply-chain-and-skills/>
33. <https://www.offshorewindscotland.org.uk/media/r3rp3du2/sowec-innovation-guide-january-2025.pdf>
34. https://www.scottishrenewables.com/assets/000/001/555/SCOTLANDS_OFFSHORE_WIND_SECTOR_2020_8_original.pdf?1617265431
35. https://www.scottishrenewables.com/assets/000/002/337/SR_SUPPLY_CHAIN_2PP_v7_original.pdf?1652708284
36. <https://www.crownstatescotland.com/sites/default/files/2023-07/scotwind-area-19-scds-outlook.pdf>