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Celtic Sea developers urged to collaborate

There is increased risk of cumulative environmental and navigational impacts from overlapping project development areas in the Crown Estate's in-progress Celtic Sea leasing Round 5, GOW 2025 will hear. **p2**

Wake row clouds 9GW pipeline

Wake effects are expected to come under the spotlight in London this week as a series of disagreements between rival developers over potential yield losses continues to play out in planning exams for around 9GW of offshore capacity. **p3**

THE INTERVIEW reNEWS

Equinor head of UK renewables policy Chris Fox discusses the 'unprecedented' uncertainty surrounding AR7. **p4**

Offshore wind deployment surges

All eyes are on how ambition will turn into delivery amid mounting opportunity, writes RenewableUK deputy chief executive Jane Cooper. **p5**

What's on at GOW 2025?

Highlights from Tuesday's education and networking programme. **p8**

UK sector seeks AR7 assurances

The UK offshore wind sector will call on Energy Secretary Ed Miliband this week to clear up growing uncertainty threatening the success of this year's critical Allocation Round 7 auction.

Senior executives will take to the stage at Global Offshore Wind 2025 in London to seek clarity from Miliband and his officials ahead of the Contracts for Difference exercise, which opens in August.

The DESNZ Secretary is due to open the conference on the morning of Day 1 where it is hoped he will give answers on key policy questions hanging over the auction that are creating anxiety in the sector.

The spectre of zonal pricing, uncertainty over grid charging, connections reform queries and a lack of clarity on key AR7 rules such as eligibility are combining to dent already fragile confidence in the industry, which continues to face wider economic and cost challenges.

Equinor UK head of renewables policy Chris Fox, who will speak on Day



MAKING A POINT: Ed Miliband Photo: Aleksandra Dragoi / DESNZ

1 of the conference, said the uncertainty heading into this year's auction is "unprecedented".

"AR7 later this year is the last best chance to secure 'shovel ready' projects that can deliver for 2030," said Fox in an interview published in today's reNEWS GOW 2025 preview show daily.

"Several key decisions from government over the next 100 days may well determine whether the Clean Power 2030 target remains achievable, or, more importantly, whether the potential economic benefits for the UK can be realised."

Among the decisions needed are clarity on the Review of Electricity Market Arrangements, whether CfD contracts will be extended

from 15 years and if unconsented projects will be allowed to enter the auction.

Vestas northern and central Europe president Nils de Baar, who is also due to speak on Day 1 of GOW 2025, is among those opposed to the latter, which he said is a "major uncertainty and concern ahead of AR7".

"It would mean that projects can't take FID until consent is received which increases the non-delivery risk for projects with CfDs, challenging supply chain planning and the capacity allocation," de Baar told reNEWS in an interview to be published tomorrow.

SSE Renewables managing director Stephen Wheeler also has concerns over the proposal and writes in today's show daily that zonal pricing "would be hugely damaging".

"AR7 is not just another auction round. It is one of the last realistic opportunities for the UK to secure the scale of investment needed to meet its CP2030 targets and so deliver homegrown, affordable, clean energy to consumers."

TRENDING ON reNEWS.BIZ

Innosea to rebrand as OWC

French marine renewable energy specialist Innosea is to rebrand as OWC. The name change, which is due to take place in July, finalises Innosea's integration into sister company OWC. [Click here](#)

Topping-out for Thor base as 2025 finish nears

RWE has marked a milestone in the development of Denmark's largest offshore wind farm with a topping-out ceremony for the project's new operations and maintenance base. [Click here](#)

CWHI completes first XXL monopiles for Inch Cape

CWHI has completed the first of 32 XXL monopiles for ESB and Red Rock Renewables' 1.1GW Inch Cape offshore wind farm off east Scotland. [Click here](#)

Taiwan opens talks on 3GW Round 3.3

Taipei has opened consultations with industry on its 3GW Round 3.3 offshore wind allocation round. According to reports, the government is considering introducing a floor price in the auction. [Click here](#)

Flotation, Vargronn complete NorthConnect deal

Flotation Energy and Vargronn have closed their acquisition of the NorthConnect interconnector project between Scotland and Norway. [Click here](#)





Sponsor's welcome

Global Offshore Wind remains the largest event in the UK dedicated to the offshore wind sector. Organised by Renewable UK, this year, the conference will focus on the urgent actions needed to reach UK and global offshore wind deployment goals for 2030.

The event programme "Mission: Possible" features two jam-packed days of political keynotes, expert panels, sector deal updates, business partnering, international pavilions, inward delegations and more.

There will also be 270+ exhibitors from 50+ countries as well as 5000 attendees expected, providing a fantastic opportunity for networking

and collaboration with individuals and/or companies across the sector.

SPIE Wind Connect, the leading high voltage services provider to the offshore wind industry, will be in attendance throughout the event to present its closed loop solutions to the offshore renewable energy sector.

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Visit us at Global Offshore Wind 2025, 17-18 June in London, stand P52 and learn more about our unrivalled service offering to the offshore energy sector.

Celtic Sea developers urged to collaborate

There is increased risk of cumulative environmental and navigational impacts from overlapping project development areas in the Crown Estate's in-progress Celtic Sea leasing Round 5, GOW 2025 will hear.

WSP technical director Nigel Coulshed, who will speak at the London conference on Day 1, said proactive collaboration between the winning bidders across the development lifecycle could be key to reducing programme risk and regulatory friction,

Early coordination around

shipping corridors and community engagement will be especially important, Coulshed told reNEWS ahead of the two-day event.

He is due to speak on a panel session in the GOW 2025 Energy Transition Zone on collaboration in the Celtic Sea.

Coulshed will add that the Celtic Sea Developer Alliance could play a key role in facilitating greater alignment between developers on consenting, stakeholder engagement and supply chain development as the Crown Estate gears up to announce

the results of the auction for the three 1.5GW seabed plots later this summer.

"We are encouraging developers to come together on shared evidence bases, cumulative effects assessments and joint engagement with commercial fisheries," Coulshed said.

"This approach not only builds trust with stakeholders but also enhances the credibility of consent applications while, with coordinated data sets and aligned engagement strategies, collaboration could become an advantage."

IN BRIEF

■ North Star chief executive Gitte Gard Talmo will discuss maximising the opportunities for offshore wind in the North Sea in a panel discussion on Wednesday.

■ The Offshore Renewable Energy Catapult will launch its updated Guide to an Offshore Wind Farm at GOW 2025. Changes include refreshed lifecycle stages.

■ Venterra Group chief executive Ed Daniels will call for faster, leaner services "if global installed capacity is to rise to an expected 306GW in the next decade in his welcome address."

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Wake rows cloud 9GW pipeline

Wake effects are expected to come under the spotlight in London this week as a series of disagreements between rival developers over potential yield losses continues to play out in planning exams for around 9GW of offshore capacity.

This year's Global Offshore Wind event is taking place while the live disputes surrounding potential compensation for owners of existing wind farms approach their conclusion as Energy Secretary Ed Miliband (who opens GOW 2025 tomorrow with a keynote speech) prepares to make consent decisions over the next six months on six schemes.

First up for a permit call on 16 July will be BP and EnBW's 1.5GW Mona array, for which the oil giant and German utility rejected a request from the UK government earlier this month to provide a wake effects assessment, saying there is no current policy requirement to do so.

Planners had already heard competing calls from Orsted which claimed the project plus BP-EnBW's neighbouring 1.5GW Morgan and Cobra-Flotation Energy's 480MW Morecambe developments would

Disputes over wake effect losses are escalating ahead of rulings on contested projects, writes **Paul Stephen**

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reduce energy yields by up to 5.3% at six of the Danish giant's operational Irish Sea wind farms.

Meanwhile, RWE has come under fire from ScottishPower Renewables for projected wake loss impacts at the consented 900MW East Anglia 2 wind farm caused by the 1.1GW Five Estuaries array off east England.

SPR has called for an assessment to be made on the "material" loss of energy yield ahead of a final determination being made for the latter 79-turbine array in September.

Also in the North Sea, RWE agreed to conduct a wake loss study for the 3GW Dogger Bank South complex. However, SSE, Equinor and Vargronn said the findings were "significantly lower" than their own assessment of losses at the neighbouring 3.6GW three-phase Dogger Bank complex.

RWE said its results were a "central estimate" as modelling was "not

a settled science with clear best practice".

Finally, Corio and TotalEnergies opted to provide an independent study for the 1.5GW Outer Dowsing wind farm after separate exercises carried out by the duo and Orsted failed to agree on losses at the Danish developer's 573MW Race Bank, 1.2GW Hornsea 1 and 1.3GW Hornsea 2 developments. Ministers and officials pledged in last year's Clean Power

Action Plan to seek opinions from planners, academics, data scientists and policy experts to "understand the levers we can pull in this space" to help prevent future stand-offs.

London is mulling an update to National Policy Statements that would waive the requirement for developers to provide compensation if they can demonstrate they have taken "all reasonable steps to minimise as far as possible" the impacts on neighbouring wind farms.

Efforts are also being made to develop strategies to best quantify the phenomenon with research on validation models launched by the University of Manchester and scientists from Germany, the Netherlands and Denmark. ■

UK OFFSHORE PIPELINE

Project	Developers	MW	Consent decision due
Dogger Bank South	RWE, Masdar	3000	14/01/2026
Five Estuaries	RWE, Macquarie, ESB, Sumitomo	1080	17/09/2025
Mona	BP, EnBW	1500	16/07/2025
Morecambe	Cobra, Flotation Energy	480	23/10/2025
Morgan	BP, EnBW	1500	10/09/2025
Outer Dowsing	Corio, TotalEnergies	1500	10/10/2025
Total: 9.1GW			

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THE INTERVIEW reNEWS



Equinor head of UK renewables policy **Chris Fox** (left) discusses the 'unprecedented' uncertainty surrounding AR7, the importance of public buy-in for 2030 targets and how to address supply chain constraints

Q What is Equinor's main message for GOW 2025?

A It's been a tough few years for the offshore wind sector and we are not out of the woods yet. Global macroeconomic headwinds in the form of inflation, high interest rates and supply chain pressures have led to failed auctions in multiple markets, and projects have been delayed or cancelled as a result.

Notwithstanding this, Equinor is maintaining its long-term commitment to net zero by 2050 and reconfirming its view on the important role offshore wind will play in the energy transition.

The UK remains a core market - 2025 marks 25 years of offshore wind in the UK, highlighting the journey the industry has come to become a global offshore wind leader.

Clean Power 2030 signals that the UK is open for business and presents a huge economic opportunity to deliver investment and jobs. The focus on the theme of 'Mission Possible' at GOW 2025 couldn't come at a more critical time - it offers an opportunity for industry, supply chain and policy makers to come together and align on the action needed.

Q What is the company's view of the proposed changes to AR7?

A AR7 later this year is the last best chance to secure shovel ready projects that can deliver for 2030.

However, with network charging, connection reform, auction rules and wider market design all in flux there is an unprecedented amount of uncertainty going into this year's auction.

Several key decisions from Government over the next 100 days may well determine whether the CP2030 target remains achievable, or, more importantly, whether the potential economic benefits for the UK can be realised.

Q Do you believe the government should revise down its 2030 offshore wind target?

A The importance of the 2030 target, aside from being a galvanising call to action for both the public and private sector, is not clean power in and of itself.

It's what clean power represents, not just in GWs installed, but in terms of energy security, growth, jobs and the revitalisation of the communities in which we work. Delivering these benefits is what will help bring the public (and voters) with us on the journey to net zero. The action needed from government can be summarised in three steps: Reset investor confidence ahead of AR7 by making the right call on key decisions over the next 100 days, enable renewables to scale to meet expected demand growth and capture the economic opportunities, and a relentless focus within government on ensuring policies are conducive to ensuring that awarded offshore wind capacity can be delivered and existing capacity retained.

Q How can critical supply chain constraints in HVDC cables, substations, and switchgear be addressed to meet growing demand for offshore wind capacity?

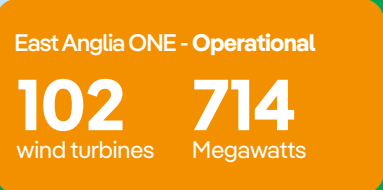
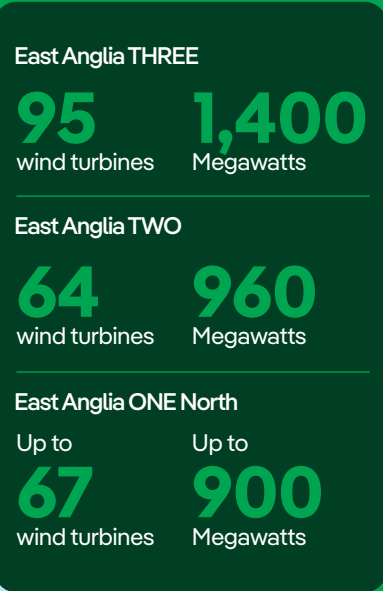
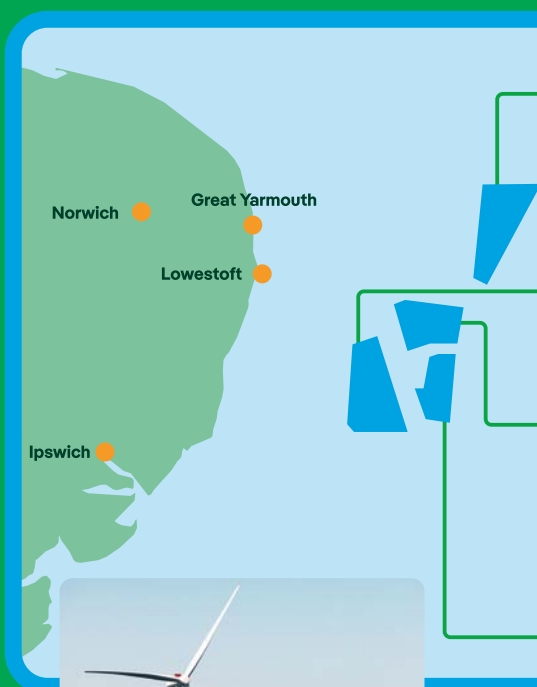
A There has been a great deal of policy and regulatory focus on supporting the onshore Transmission Owners to deliver what they need for 2030. We've had both the Accelerated Strategic Transmission Investment scheme and the Advanced Procurement Mechanism brought in by Ofgem, which don't address this problem for offshore wind developers. After all, of the £58bn of investment identified in the Holistic Network Design, a significant proportion will be delivered under the Offshore Transmission regime, rather than by the onshore Transmission Owners.

We have the added challenge of this being project by project and the CfD coming relatively late in a project's life cycle. Whereas Transmission Owners like TenneT and more recently the ones in GB are able to place large scale framework agreements with HVDC and grid suppliers, many developers, unless they have large global portfolios, are in no such position. This is where the challenge of large pre-commitments coming up to four years ahead of CfD award presents a barrier to timely delivery and why we have called for a version of the Advanced Procurement Mechanism to be extended to developers and for improved line of sight in future to help secure more investment in supply chain capacity.

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Offshore wind deployment continues to surge ahead

All eyes are on how ambition will turn into delivery amid mounting opportunity, writes RenewableUK deputy chief executive **Jane Cooper**

A great deal of activity has taken place in our industry since last year's Global Offshore Wind conference in Manchester.

Our latest EnergyPulse report published today shows operational offshore wind capacity has grown worldwide by 14% over the last 12 months to 85.2GW, with China and the UK retaining their top spots. The total global project pipeline of 1,219GW across 1555 projects shows the scale of our industry's ambition.

Here in the UK, we've had a change of government, with Labour elected last July on a clear mandate to reach clean power by 2030 and the appointment of a new Energy Secretary Ed Miliband who has set ambitious targets for offshore wind and is taking measures to achieve these.

The government has also announced the creation of the publicly-owned Great British Energy, to invest in clean energy projects.

In September 2024, we secured 9.6GW of new renewable energy capacity for the UK in Allocation Round 6.

The AR6 results, in which nine offshore wind projects with a combined capacity

of nearly 5GW secured contracts, showed investor confidence returned to the UK after the 2023 failure of the offshore wind auction.

Now we're looking ahead to AR7, with nearly 8.5GW of offshore wind capacity alone currently eligible, with the potential to mobilise billions in private investment and trigger supply chain growth.

However, there are still uncertainties to resolve before the auction opens to ensure the most cost-effective results.

We are urging the government to rule out a move to zonal pricing and make progress instead with an enhanced national market. Until this is resolved we are likely to see investment risks reflected in higher strike prices.

We also need clarity on the design of AR7 including whether unconsented projects will be eligible for the auction. This will give participants a clear understanding of the auction rules and allow developers to focus on delivering the capacity needed to meet the government's targets.

In April, the Prime Minister

announced £300m of funding to attract further global offshore wind investment in the UK at a time of intense international competition.

This will help to ensure that the UK seizes industrial opportunities in the offshore wind supply chain, nurturing existing companies and ensuring others join them.

As our Industrial Growth Plan shows, we have the potential to triple our manufacturing capacity over the next decade, adding £25bn to the UK economy and creating an additional 10,000 supply chain jobs.

This £300m funding, confirmed by the Chancellor in her Spending Review last week, is a signal of intent.

In May, the government gave the supply chain a further boost by more than doubling funding for the Clean Industry Bonus (CIB), which has the potential to help secure billions in private investment in new factories producing components for the offshore wind industry, and creating new jobs in coastal communities.

The CIB is part of the long awaited Industrial Strategy, which we hope will contain new policies to support the expansion of UK ports to accommodate offshore wind manufacturing and turbine assembly.

We have been campaigning long and hard for this.

Much work lies ahead to transform quaysides around our coastline into clusters of global excellence. Our campaign is paying off, as the Chancellor confirmed £80m of investment in Port Talbot for the development of new port facilities in last week's Spending Review.

Watch out for a series of major announcements by industry and government during this year's Global Offshore Wind conference.

You are very welcome to the biggest event of its kind and I know you will make the most of the opportunities to do business which this event offers.



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OPPORTUNITY KNOCKS: Jane Cooper

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As delegates gather again for this year's Global Offshore Wind conference, it does feel like we're at another pivotal moment for the offshore wind industry, especially here in the UK.

Nearly a year on from the UK General Election, we've seen the new government confirm its ambitious Clean Power 2030 mission, and back that up with positive policy and regulatory progress in several areas.

Still, the world around us is changing and we can't shy away from the turbulence our sector is facing from the new geopolitical and macro-economic realities.

How we navigate this new uncertain world, while delivering the core aims of Clean Power 2030 (CP2030) – lower bills, greater energy security and green jobs – is the exam question before us.

With the UK racing to deliver these CP2030 ambitions, Allocation Round 7 (AR7) of the Contracts for Difference (CfD) scheme stands as the next critical inflection point before us.

AR7 auction pivotal to delivering clean energy ambitions



Tender is the UK's last major chance to unlock the scale of offshore wind investment needed to meet CP2030, writes SSE Renewables managing director **Stephen Wheeler**

AR7 is not just another auction round. It is one of the last realistic opportunities for the UK to secure the scale of investment needed to meet its CP2030 targets.

Securing through AR7, and then delivering at pace, a volume of offshore wind we haven't seen before in one allocation round, will be a core component of meeting CP2030.

As the UK's clean energy champion, SSE very much welcomes the signal that government ministers have already given on their AR7

ambition. Replacing the traditional monetary budget with a "capacity ambition" in advance of the auction and giving the Secretary of State the flexibility to set the final budget to maximise the volume of offshore wind capacity contracted is welcome.

Equally, extending the CfD contract length from its current 15-year term to either 20 or 25 years would reduce strike prices and pressure on bills whilst further protecting consumers from volatile gas prices. However, the

spectre of zonal pricing looms large and would be hugely damaging to the investment required to deliver CP2030. Regardless of the potential protections offered to projects entering AR7, ruling out zonal pricing now will be vital in ensuring optimum AR7 success.

Zonal pricing would be particularly detrimental to Scottish projects. Our view is you can't deliver UK offshore wind targets for 2030 without Scottish offshore wind.

There is an opportunity to safeguard delivery of Scottish

offshore projects through AR7 by levelling the playing field, taking into consideration the volatile and unpredictable nature of transmission charges impacting Scottish projects.

Separately, there's a balance to be struck between maximising the number of projects in the auction and ensuring they are mature enough to be confident in delivery. That's why we have concerns over proposals to relax criteria to allow unconsented offshore wind projects to participate in the auction process.

Equally, by ensuring projects in the very latter stages of the consenting process, such as our Berwick Bank project, get a determination in time for the AR7 auction, we can deliver the scheme's most ambitious and competitive auction to date.

What we need now is to keep up that momentum. Getting AR7 right gives us the chance to show that CP2030 is deliverable and would provide a welcome boost to investor confidence. ■

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THE INTERVIEW

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Siemens Energy UK & Ireland vice president **Darren Davidson** (left) discusses meeting 2030 goals, investment in education and training, and how the UK can remain an attractive investment opportunity

Q What is Siemens Energy's key message for policymakers around offshore wind at GOW 2025?

A Siemens Energy, together with our wind power business Siemens Gamesa, is a major employer in the UK with 6500 workers at sites across the country.

The UK Government's Clean Power 2030 Action Plan was launched at our Hull factory at the end of last year.

So, I'm pleased to see this year's conference will focus on the 'Mission: Possible' theme and the urgent actions needed to reach those wind deployment goals for 2030.

I'm particularly looking forward to my panel session, when we'll be exploring how we build a supply chain for the net zero era and asking if it's mission ready. For me, if we're going to do this, one of the fundamental building blocks we must get right now is skills.

Q How can investment in skills, innovation, and long-term collaboration strengthen the supply chain, ensuring it remains agile, scalable, and resilient for future growth?

A Around 1000 people have joined Siemens Energy in the UK over the last 18 months, and 400 of our team are apprentices or graduates.

We'd like to hire more, but to grow our workforce at pace and to attract people to this industry we need clarity beyond 2030.

That means investment in education and training,

and policies that support both job creation and the transition of workers from other industries or sectors in decline.

For larger investments it's vital that we have clarity. The energy industry is a great place to make a career, but we need to convince potential workers that this is the place to be.

Whether that is young people or those transferring from other industries. We need to offer them training, opportunities to develop their skills on real projects and to hang on to some of the older people we have a little longer.

Q One year on from the Industrial Growth Plan (IGP), how has the offshore wind supply chain progressed from strategy to tangible delivery, and what steps are needed to sustain momentum?

A When the IGP was first published last year, it highlighted the UK's record of delivery, mature market design and size of pipeline.

The IGP also highlighted the need for close cooperation between government and the private sector.

In uncertain times, it's great to see the momentum and consistent progress being maintained. What we now need is a swift, flexible and simple allocation process to the supply chain so that funding bureaucracy does not hold up business cases, but which of course is robust enough to hold recipients to account for the

economic value they promise to deliver. The last few years have proven that when we've got that visible pipeline of projects it allows us a greater ability to invest.

To keep on track with clean power 2030 targets, we estimate AR7 will need to clear a record 6GW of offshore wind capacity.

Q As the global supply chain evolves, how can international players work together to drive innovation, cost reduction and supply chain security for offshore wind?

A The rest of the world is competing for the technologies and the people to decarbonise their economies. It's crucial for the UK to remain an attractive market to investors.

Home-made initiatives like the CfD have supported that, but to be competitive, we need to provide consistent and long-term certainty on future market size, demonstrate predictability and profitability in renewable auctions and simplify regulation to speed up progress.

In recent weeks we have had the welcome news of a new UK-EU deal that will include closer energy collaboration.

The Chancellor's Spending Review has also seen a commitment to investment in long term infrastructure and energy projects.

I hope that the upcoming Industrial Strategy will go some way to addressing this, too.



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TUESDAY HIGHLIGHTS

In conversation with Ed Miliband
The DESNZ Secretary makes his opening remarks at this year's GOW 2025 and talks to RenewableUK deputy chief executive Jane Cooper.
0900-0945, Platinum 1

Mission briefing
Hear key updates from leading energy and infrastructure institutions, outlining their progress and offering a forward-looking view on the path to net zero. Features speakers from GB Energy, The

Crown Estate and DESNZ.
0945-1045, Platinum 1

Mission accepted
Industry leaders including Orsted UK manager Benj Sykes, SPR chief Charlie Jordan and RWE chief operations officer Thomas Michel react to the updates presented in the preceding briefing. Nearly a year after the general election, are the fundamentals in place to drive the transition to net zero?
1115-1215, Platinum 1

The global offshore wind sector
Speakers including Vestas head of offshore sales David Rooney and Venterra chief Ed Daniels examine how shifting geopolitical dynamics are impacting the offshore wind sector.
1300-1400, Platinum 1

Net zero grid
A panel of speakers from NESO, Equinor and Hitachi discuss how critical supply chain constraints in HVDC cables, substations, and switchgear can be addressed to meet growing demand for offshore wind capacity.
1415-1515, Platinum 1

Clusters
Learn what an offshore wind cluster is and how they can drive economic growth. Featuring speakers from Orsted and The Crown Estate.
1530-1630, Platinum 1

Networking reception
Join colleagues and friends for the official networking drinks reception at the end of a busy Day 1.
1700-1900, Exhibition Hall



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