

10 Year Vision and Strategy for North East England Offshore Wind

April 2026



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Table of abbreviations

Abbreviation	Meaning	Abbreviation	Meaning
AR8 / AR9	Allocation Round 8 / 9 (UK government auctions for Contracts for Difference)	NOF	UK business development organization, operator of Energi Coast
CfD	Contract for Difference (UK revenue support mechanism for low-carbon electricity)	O&M	Operations & Maintenance (activities to keep wind farms running efficiently)
Cluster	Regional grouping of businesses, public bodies, and research institutions (e.g., Energi Coast)	OEM	Original Equipment Manufacturer (e.g., turbine or cable producer)
DBT	Department for Business and Trade (UK Government)	ORE Catapult	Offshore Renewable Energy Catapult (UK innovation centre)
Deepwater Vanguard	Strategic growth play for deeper-water offshore wind technologies	OSW	Offshore Wind
Energi Coast	North East England offshore wind cluster, owned and operated by NOF	OTIF	On-time-in-full – a metric of supply chain fulfilment accuracy, typically expressed as a percentage
Enabling Themes	Cross-cutting foundations for delivery (skills, innovation, finance, advocacy)	Platform Growth Plays	Strategic focus areas that cut across markets (e.g., advanced manufacturing, digital services)
FE/HE	Further Education / Higher Education	PMO	Project Management Office
FLOW	Floating Offshore Wind	R&D	Research & Development
GVA	Gross Value Added (measure of economic output)	ScotWind	Major Scottish offshore wind leasing round
HVDC	High Voltage Direct Current (technology for long-distance electricity transmission)	SME	Small and Medium-sized Enterprise
IGP	Industrial Growth Plan (UK Offshore Wind Industrial Growth Plan)	Supply Chain Capability	Regional firms' collective capacity to deliver goods/services across the offshore wind value chain
JDR Cables	Major manufacturer of subsea power cables in North East England	TCE	The Crown Estate (statutory corporation responsible for seabed leasing in England and Wales)
Local Growth Plan	Regional economic development strategy produced by Combined Authorities	TP	Transition Piece (structural component connecting turbine tower to foundation)
North East CA	North East Combined Authority	TVCA	Tees Valley Combined Authority
NESO	National Energy System Operator	Vision Statement	Concise statement of the region's ambition for offshore wind leadership

Foreword: Kim McGuinness, North East Mayor



Green energy jobs will one day be as totemic to our North East identity as coal mining and ship building.

That is a vision owned by the region – the workers maintaining turbines, the researchers testing them, their Mayor championing them. From our local skills funding to our global investment partnerships, the North East is positioning itself to lead the way.

Our plan is to double the number of people working in green energy to 50,000 by 2035, securing £3bn in private sector investment for the region.

My Local Growth Plan sets out how we will achieve a just transition to a green economy, with a focus on ensuring good, green jobs are accessible to all through skills and training investment. My Combined Authority will ensure that companies from around the world see the North East as the region to invest in, because of our high-skilled workers and dedicated infrastructure. As highlighted in our New Deal for North East Workers, we have an exceptional network of universities and further education providers who

are uniquely placed to develop a strong pipeline of talent, directly to the businesses that need it.

We have the most advanced offshore wind industrial cluster in the UK, which is located close to North Sea development sites and accounts for one fifth of the UK's offshore wind economy. Our ports are fantastic regional assets, with three deep water ports that are all well suited to clean energy development with proven delivery outcomes. The £160mn flagship North East Investment Zone which includes Blyth Energy Central and the River Tyne Economic Corridor is already attracting global interest, which we will build on by investing in critical port infrastructure to attract major inward investment from offshore wind developers and supply chain manufacturers.

The North East is showing how green jobs create place-based economic growth. We are knitting together pride in place to an economy fit for the future, and we look forward to working with global organisations on this agenda.

Foreword: Ben Houchen Tees Valley Mayor



Offshore wind is already proving to be one of the most important economic opportunities our part of the world has seen in a generation.

It is no mistake that here in the Tees Valley, we have spent the best part of a decade ensuring our region is not just part of this rapidly growing industry but is actively leading it.

Nowhere else in the country has moved as quickly, or as decisively, to turn the promise of offshore wind into long-term jobs and new investment as Tees Valley.

SeAH Wind's £1 billion monopile facility – the largest of its kind in the world – is a clear statement of our intent and ambition, as are the new heavy-lift quays at South Bank, the expansion at JDR Cables, and the arrival of new businesses across Teesworks and our wider industrial sites across the region.

These projects are already creating hundreds of high-quality jobs, with thousands more on the way as our manufacturing base scales up. They show what can be achieved by fully committing ourselves, backing our strengths and offering investors the certainty, land, and infrastructure they need.

Our region is uniquely placed to meet this challenge. We have the land, the deep-water access, the fabrication yards, the specialist firms, and the engineering expertise

to deliver components at industrial scale. And crucially, we have a pipeline of local people ready to take up these opportunities through the skills programmes, apprenticeships, and training centres we have invested in to support future industries.

The North East of England has always been defined by what we make. In generations past, we built the ships, rigs, platforms, steel, and machinery that powered the economy and built the modern world. Our engineering talent is recognised worldwide thanks to the longstanding skills and expertise our local workers have gained over generations of work in industry, manufacturing, and logistics.

To maximise the impact for our region, we must work as a whole North East. Together, we can create one of the most capable offshore wind manufacturing and logistics regions in Europe.

Offshore wind gives us the chance not only to rebuild the North East's shared industrial strength here at home, but to simultaneously place us at the very centre of the United Kingdom's future energy security for generations to come. By working closely with industry, the North East of England can and will become the UK's undisputed leader in offshore wind.

Executive Summary

Offshore wind: an economic opportunity for the North East and Tees Valley

The UK has an opportunity to secure greater levels of supply chain content to unlock high quality job opportunities in the UK, whilst strengthening long-term capacity of the UK's offshore wind supply chain. The North East and Tees Valley are strongly placed to increase UK content, utilising its already world-leading supply chain, infrastructure, and skills base.

In March 2026, The Crown Estate announced their intention to launch the Offshore Wind Leasing Round 6 in the first half of 2027. The identified area, off the coast of North East England, could support a capacity of around 6GW, predominantly through fixed-bottom turbines. This provides a strong pipeline for future offshore wind projects and sends a clear signal of confidence in regions like the North East, which already have the skills, ports, and supply chain capacity to lead.

Together the North East Combined Authority and the Tees Valley Combined Authority recognise the importance of offshore wind to creating good quality green jobs, unlocking investment, and driving growth across both areas. Both Combined Authorities have placed offshore wind and clean energy at the heart of their Local Growth Plans and wider strategies. Together the pan-region of the North East and Tees Valley possess the infrastructure, institutions, skills and expertise, supply chains, and shared ambition to ensure we collectively grasp the next generation of offshore wind investment opportunities.

North East Mayor, Kim McGuinness has an ambition to double the number of green jobs to 50,000 by 2035, with offshore wind playing a critical role in driving job creation, as outlined in the North East Local Growth Plan.

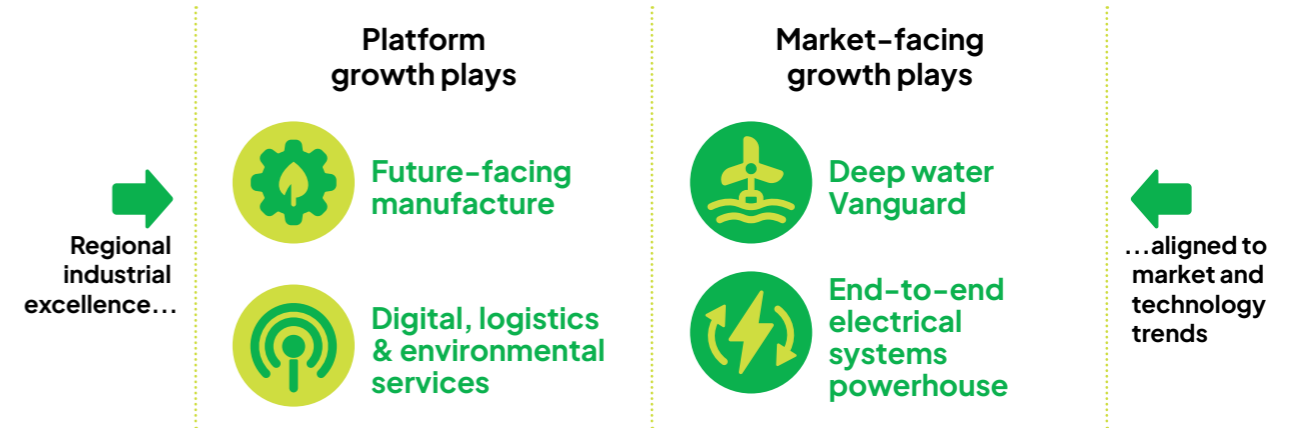
Similarly, the Tees Valley Combined Authority prioritises growing its modern industrial and technology cluster of 17,000 jobs, comprising offshore wind and wider clean energy technologies.

With shared strategic ambitions and alignment, paired with the world-leading offshore wind supply chain at the heart of delivering North Sea offshore wind expansion and projects across the globe, provides the North East and Tees Valley with a once in a generation economic opportunity.

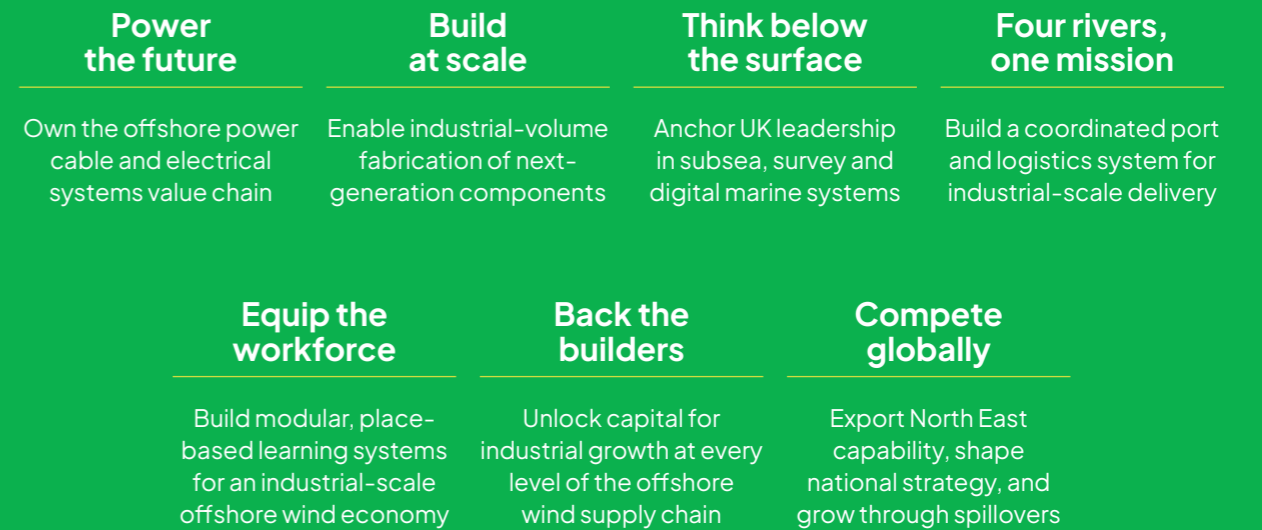
For the first time, we have collectively developed a 10-year vision and strategy with Energi Coast, setting out a plan for the next phase of offshore wind industrialisation in the North East and Tees Valley, outlining the specific interventions to build delivery momentum over the next decade.

One-page executive summary

Four Strategic Themes for growth



Delivered through seven ready-to-deliver Agendas for Action





Introduction

This report sets out an offshore wind industrialisation strategy for North East England.

The work presented in this document draws on a broad evidence base:

- **Comprehensive literature review** of national and regional policy and strategy documents to establish the underlying context.
- **Internal Everoze data** on supply chain capability and technology trends to inform the prioritisation of opportunities and interventions.
- **Targeted engagement** through confidential one to one meetings with supply chain representatives and regional and national policymakers to address information gaps.
- **In person workshop** (24 July 2025, Newcastle) with the Client group, supply chain representatives and developers to challenge, inform and validate the emerging strategic direction.
- **Further one to one engagement** with national organisations to socialise the broad themes and gather initial responses.

As a result, this work reflects the perspectives of sponsor stakeholders in North East England, is underpinned by a robust understanding of supply chain capabilities, aligns with national and regional policy, and has been validated from multiple external viewpoints.

The remainder of the report is structured as follows:

Section 2

Sets out the region's case for offshore wind leadership, grounded in its industrial legacy, culture of innovation, institutional alignment, and globally competitive infrastructure.

Section 3

Articulates a bold ten-year vision for North East England as a national and international leader in offshore wind.

Section 4

Defines the strategic framework, identifying priority markets, industrial focus areas, and enabling themes that underpin regional ambition.

Section 5

Translates strategy into action, presenting a prioritised suite of interventions structured around seven integrated action agendas.

Section 6

Addresses the complexities of delivery, proposing robust governance and accountability, monitoring, and evaluation mechanisms to ensure accountability and momentum.

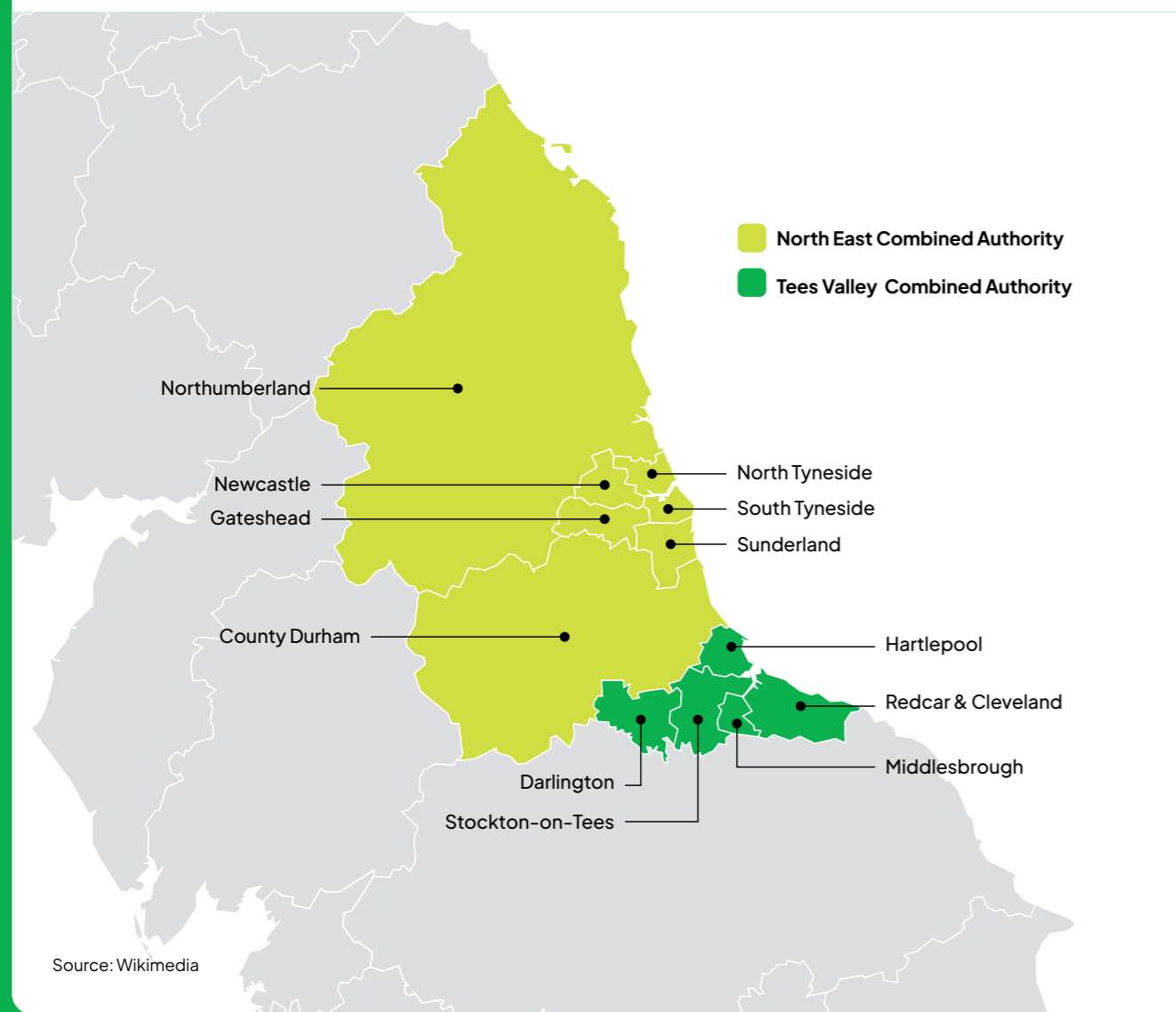
Appendix 1

Provides an additional level of detail about the proposed interventions.

Why NE England?

The region's competitive advantage in offshore wind

Figure 1: North East England showing the two mayoral combined authorities



Source: Wikimedia

2.1

North East England, the UK's original global industrial powerhouse

North East England has built its identity on successive waves of industrial innovation and leadership. The coal, steel and shipbuilding economy of the 19th century created one of the world's first fully integrated industrial regions. In the 20th century the same ecosystem of fabricators, engineers and ports adapted to serve the North Sea Oil & Gas industry.

This characteristic and enduring ability to innovate, adapt, and mobilise entire industries, is seen today in North East England's position as a centre for UK clean energy, energy security, and decarbonisation. Skills, capabilities and globally connected supply chains in advanced manufacturing, heavy engineering, subsea and other sectors, position the region to lead the industrialisation of offshore wind.

2.1.1

Two Combined Authorities, one common vision

The region of North East England straddles two Combined Authority areas: the North East and Tees Valley Mayoral Combined Authorities. Both Combined Authorities position offshore wind as a cornerstone of their economic and energy strategies. As well as emphasising the clean energy opportunity in their Local Growth Plans and Local Industrial Strategies, both Authorities take a proactive, entrepreneurial approach to securing the industrial benefits of offshore wind. Acting as convenors and advocates, they align local ambition with national policy goals and foster collaboration between industry, government, and academia. Local authorities are key in supporting both Combined Authorities in shaping strategy and policy development, whilst providing additional resource, capacity, and expertise to ensure delivery of programmes and attracting investment.

Table 1: Mayoral combined authorities and constituent local authorities

North East Combined Authority (North East CA)

Mayor: Kim McGuinness

Local Authority/ Borough: County Durham, Gateshead, Newcastle, North Tyneside, Northumberland, South Tyneside, Sunderland

Tees Valley Combined Authority (TVCA)

Mayor: Ben Houchen

Local Authority/ Borough: Darlington, Stockton-on-Tees, Hartlepool, Middlesbrough, Redcar & Cleveland

2.1.2

Energi Coast: industrial leadership in North East England

North East England is already one of the most coherent and proactive offshore wind clusters in the UK. The two Mayoral Combined Authorities provide vital leadership and region-wide strategic alignment, with devolved responsibilities that enable coordinated action on infrastructure, skills, and investment.

On the industry side of the equation, the Energi Coast business network,

owned and operated by NOF, is embedded in regional and national initiatives and has demonstrated its ability to foster collaboration across the supply chain. This spirit of collaboration means that companies from supply chain firms to developers are welcome and active participants in shaping regional priorities.

This consistent alignment between public institutions and private actors gives North East England a distinct advantage compared to many other regions. Few parts

of the country can match this region's combination of institutional maturity, delivery track record and shared ambition.

North East England's collaborative culture had already delivered one of the UK's most exciting offshore wind markets. The ambition of this region is to go much further. This objective of this document is to chart how the same collaborative approach can unlock even greater scale and pace to firmly position North East England as the UK's undisputed leader in offshore wind industrialisation.



Energi Coast: Driving North East England's offshore wind ambition



Established in 2011 and owned and operated by NOF, Energi Coast is the North East of England's offshore wind cluster, uniting regional industry leaders. It serves as a collaborative platform that promotes the region as a global hub and centre of excellence for offshore wind. Through a focused programme of meetings, events and targeted marketing, Energi Coast strengthens supply-chain integration and raises the profile of regional capabilities across UK and international markets.

NOF's 400+ members span the offshore wind and clean energy value chain, providing access to networking, strategic collaboration, and market intelligence. Members also benefit from NOF's UK and Global Offshore Wind Projects

Database (OWPD), which offers insight into project pipelines, key players, and supply-chain forecasts.

The UK's 2024 Offshore Wind Industrial Growth Plan (IGP) recognised Energi Coast as a critical regional enabler, a role reinforced in 2025 through Regional Growth Prospectuses for Offshore Wind commissioned by The Crown Estate and the Offshore Wind Industry Council (OWIC).

This document reflects NOF's commitment to working across both Combined Authority areas of North East England and engaging with National bodies towards its ambition of strengthening Energi Coast's position as the UK's pre-eminent offshore wind industrial cluster.

2.2

A leading offshore wind deployment zone

The North Sea off North East England has been at the forefront of UK offshore wind deployment for a quarter of a century. Blyth hosted the UK's first offshore wind farm, commissioned in 2000, which featured the largest offshore turbines in the world at the time. That pioneering installation was succeeded in 2017 by a larger array slightly further offshore, and a demonstration-scale floating wind project is planned at the site later this decade. Further south, the Teesside wind farm entered operation in 2013.

Since those early schemes, offshore wind development in North East England has matched the sector's growing scale and ambition. More than 100 miles offshore from North East England, is the location for what will become the world's largest offshore wind farm. Collectively, the projects in the wider Dogger Bank zone currently under construction (Dogger Bank A, B, C and Sofia Wind Farm) will deliver 5 GW of capacity by 2027, with a further 4 GW targeted for completion early in the next decade. Bringing power ashore from these sites has driven advances in High Voltage Alternating Current (HVAC) and high-voltage direct current (HVDC) electricity transmission, a technology critical to the next phase of offshore wind growth.

2.2.1

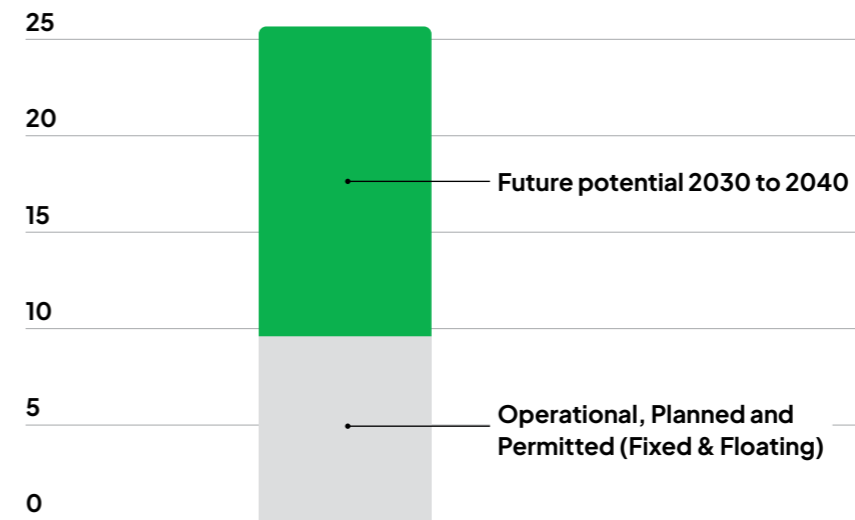
With space to grow...

Looking ahead to the 2030s, The Crown Estate has indicated leasing may be possible to unlock further sites to the North of Dogger Bank with a generating capacity of up to 16GW. These potential sites tend to be in deeper water than many contemporary fixed-bottom projects but given industry trends towards deeper applications of fixed technologies, may not necessitate the large-scale use of floating structures to achieve significant capacity growth.



Figure 2: plausible offshore wind capacity growth trajectory to 2040

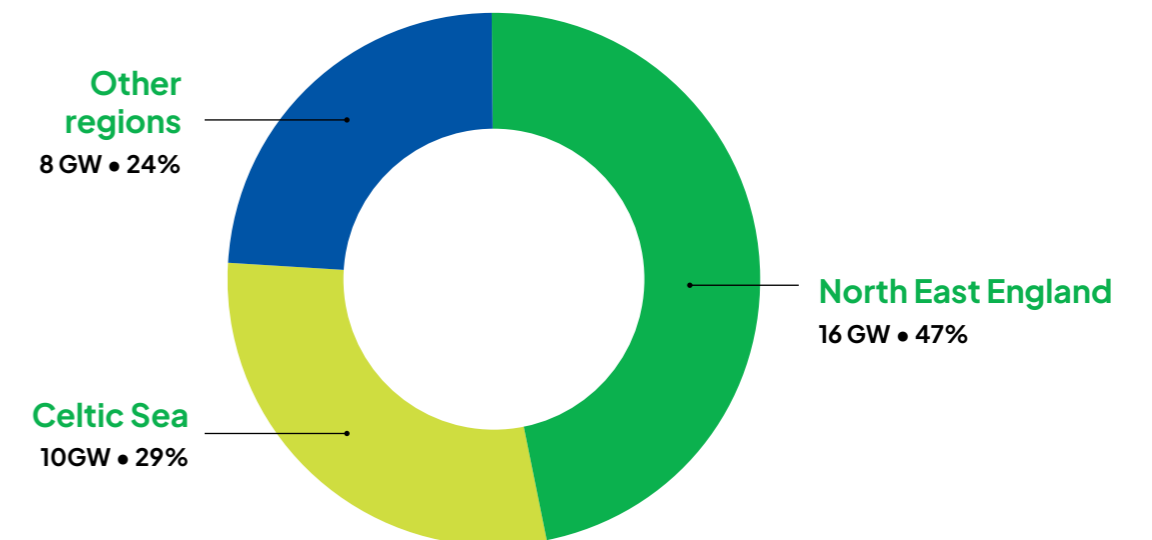
Offshore wind capacity (GW)



In the national context, North East England is poised to be the most active region for offshore wind development through the 2030s, with almost half of all potential leasing for the next decade identified by The Crown Estate within the North East Area of Opportunity.

Source: The Future Of Offshore Wind, The Crown Estate, 2024

Figure 3: Offshore wind potential leasing in England and Wales by 2030 to be operational by 2040



Source: The Future Of Offshore Wind, The Crown Estate, 2024

2.3

Modern industrial capabilities

In the 21st Century, the region's strengths in sectors such as automotive and subsea oil and gas, alongside landmark investments the offshore wind supply chain and other net zero technologies including hydrogen production and CCS provide an ideal springboard for industrial leadership.

North East England's industrial base offers deep expertise, skills, and relevant capability across several vital offshore wind supply chain segments. Heavy fabrication, electrical systems, subsea engineering, and port logistics in particular provide the basis for ambitious offshore wind industrialisation.



In **fabrication**, Smulders already deliver at-scale structural components, with SeAH Wind and Severfield bringing significant manufacturing expertise to the region's offshore wind industry, offering a solid base for advanced offshore wind manufacturing investment.



In **offshore electrical systems** JDR Cables, Prysmian, Siemens Energy, Eastgate Engineering, and others provide a genuine world-leading end-to-end capability from cable design and manufacture through to integration, installation, and monitoring.

In **subsea and robotics**, SMD, Global Offshore, Tekmar, Cathie and others bring capabilities honed in the offshore oil and gas and maritime industries to survey, trenching, geotechnical services, and marinerobotics.

In **logistics and installation**, port operators and firms such as PD Ports, Shepherd Offshore, A&P Tyne, Mammoet, Harlyn, Van Oord, ASCO and Osprey support component handling, transport, and integration.

Alongside established firms, North East England is home to a thriving network of **small and medium enterprises** (SMEs) and innovative start-ups, many of which have been supported through regional initiatives such as the TIGGOR programme, for example, Osbit, SMD and Kinewell.



2.4

Infrastructure and port assets

Ports are critical to the industrialisation of offshore wind. Beyond their physical role in manufacturing, installation, and long-term operation of wind farms, they provide an economic and geographic focus for the supply chain. This influence is evident in the clustering of manufacturers and service firms around ports, driven by the efficiencies of colocation and their emergence as hubs for innovation, skills, and collaboration. What begins as a simple need for access to the sea can, with a capable and well functioning port system, evolve into a powerful engine of regional economic growth and multiplier effects.

Significant maritime and ports infrastructure can be found on the rivers Blyth, Tyne, Wear and Tees. From centres of innovation activity, clusters of Operations & Maintenance and logistics activity, to cables and high-value fabrication and manufacture, the region's diverse and capable ports on all four rivers are playing major roles in the UK's offshore wind industry.

Already, these ports have contributed enormously to the region's emerging role as a renewable energy hub with major potential. Our strategy recognises the need to collectively expand port and quayside sites to accommodate the offshore wind supply chain, including manufacturing, installation and operations and maintenance activity.

Figure 4: Offshore Wind Ports of North East England

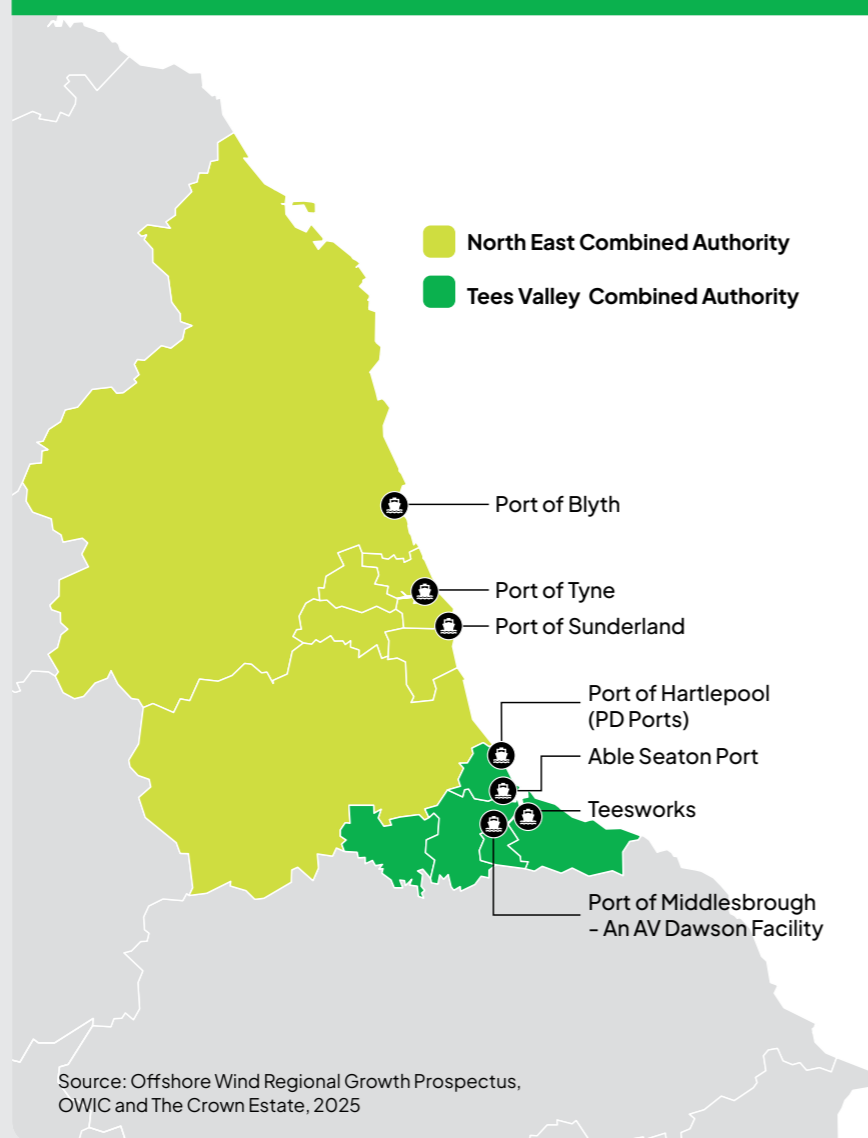


Table 2: North East England ports: Offshore wind capabilities

Port of Blyth

- Deepwater quayside
- Expansive quayside
- Significant laydown space
- Heavy lift capability
- Cable handling facilities
- Terminal for offshore energy development
- Lock free access to North Sea
- Rail connection
- The North East Investment Zone (NEIZ)
- Proximity to innovation assets (ORE Catapult / Digital, Autonomous and Robotics Engineering (DARE) Centre)
- Offshore energy decommissioning capabilities
- Available developable land

Port of Tyne

- Deepwater quaysides
- Expansive quaysides
- Heavy lift capability
- Land available for further development
- Rail access within port
- Maritime Innovation Hub at site
- Manufacturing facilities available
- Cable handling facilities
- Decommissioning facilities
- The North East Investment Zone (NEIZ)

Port of Sunderland

- Expansive quayside
- Significant laydown space
- Heavy lift capability
- Significant warehouse facilities
- Land available for further development
- Rail connection
- Centre for circular economy activities

Port of Hartlepool (PD Ports)

- Expansive quayside
- Significant laydown space
- Manufacturing facilities available for repurposing
- Cable handling facilities
- Lock-free access to North Sea

Source: The Future Of Offshore Wind, The Crown Estate, 2024

Able Seaton Port

- Deepwater quayside
- Sheltered water
- Expansive quayside
- Manufacturing facilities available for repurposing
- Significant laydown space
- Suitable for turbine assembly
- Experienced marshalling port
- Offshore energy decommissioning facilities

Port of Middlesbrough – An AV Dawson Facility

- Expansive quayside
- Heavy lift capability
- Climate controlled warehouse facilities
- Cable handling facilities
- Rail access within port
- On-site ships agency
- Freeport

Teesworks, Teesport (PD Ports), and Redcar Bulk Terminal

- Deepwater quayside
- Expansive quayside
- Significant laydown space
- Heavy lift capability
- Significant warehouse facilities
- Rail access within port
- Freeport



Teesworks: industrial transformation at scale and pace

Teesworks, on the River Tees, demonstrates how ports can drive industrial growth. At 4,500 acres, it is Europe's largest brownfield redevelopment and the core of the UK's most successful freeport. Its deepwater facilities provide direct access to global trade routes, making it a natural hub for offshore wind manufacturing and logistics.

This advantage has attracted major investment, including SeAH Wind's £1 billion XXL monopile factory, one of the largest in the world.

With an annual capacity of 400,000 tonnes, the facility will ship foundations directly from the adjacent Steel River Quay to North Sea wind farms, illustrating the efficiency of colocation between manufacturing and port infrastructure.

The expansion of SeAH Wind's coating and fabrication facilities and marshalling and logistics infrastructure was supported by £4.5m funding from Round 2 of The Crown Estate's Supply Chain Accelerator.

Teesworks anchors a wider clean energy ecosystem, supporting hydrogen and carbon capture projects and backed by a dedicated Skills Academy, partnering with local providers to deliver 100's of courses. The economic impact is significant: £2 billion in secured investment and 2,700 long-term jobs, with strong multiplier effects across the regional economy. Future investment in capacity through the Teesport Offshore Wind Gateway project aims to continue the trajectory.

Able UK: from installation to decommissioning

Building upon historic specialisms in Oil & Gas, Able Seaton Port supports offshore wind manufacturing, pre-assembly, storage, and associated activities, providing a proposition that allows for

projects to be manufactured and mobilised from the same port.

Able Seaton Port functioned as the installation base for both Hornsea One and Triton Knoll Offshore Wind Farm.

The port also functioned as the installation base for the Dogger Bank Wind Farm. Supporting the installation of the first of 277 GE Vernova Haliade-X 260m tall turbines.





Blyth: from pioneer to innovation hub

The Port of Blyth exemplifies how ports evolve from pioneers to industrial anchors in offshore wind. Home to the UK's first offshore wind turbines in 2000, Blyth has spent 25 years building world-class infrastructure and a mature supply chain. Today, it is a strategic hub for some of the sector's largest projects, including RWE's 1.4GW Sofia Offshore Wind Farm, which uses Blyth as its Offshore Construction Base.

A leading example of industrial clustering, Blyth's Bates Clean Energy Terminal was developed through multi-million-pound investment, offering heavy-lift quays, cable storage tanks and engineering facilities that support turbine assembly, cable marshalling, and specialist

offshore equipment. The Port of Blyth is a partner of Energy Central, alongside Northumberland County Council, Advance Northumberland, and the Offshore Renewable Energy (ORE) Catapult. It is a cluster of attractive development sites, over 50 companies and the Energy Central Campus, a £20m+ education, skills and innovation hub for offshore wind and clean energy in Blyth, with JDR Cable Systems, Equinor and RWE as industry sponsors.

This combination of operational capability, research and innovation excellence, skills development and clear future facing ambitions has created a powerful regional ecosystem. Recent projects have generated hundreds of jobs, while new

facilities such as Osbit's assembly and test centre reinforce Blyth's role in enabling the clean energy transition.

In December 2025, Port of Blyth received £275,000 of support funding from Round 2 of The Crown Estate's Supply Chain Accelerator to accelerate the development and unlock the full potential of its Battleship Wharf site and the overall capacity of the Port of Blyth. Funding will be used to plan how to potentially create a dedicated facility for cable storage, marshalling, manufacturing, and long-term O&M support. By reclaiming land and deepening the river channel, this project will enable unrestricted access for offshore vessels.

The Tyne Corridor and the Wear: An industrial gateway for the green economy

The River Tyne Economic Corridor is a cornerstone of the North East Investment Zone, combining deepwater port capacity, industrial land, and fiscal incentives to accelerate clean energy growth. Anchored by the Port of Tyne, the £150 million Tyne Clean Energy Park spans 230 acres, adding 400 metres of heavy-lift quayside and positioning the site as a marshalling and assembly hub for major North Sea projects such as Sofia Offshore Wind Farm. Independent analysis commissioned by Port of Tyne

projects up to 12,000 jobs and £5.6 billion in economic impact. Since 2022, Port of Tyne has also been the home of The Dogger Bank O&M Base which supported the creation of 400 jobs.

Beyond the Clean Energy Park, the corridor hosts a dense cluster of engineering and fabrication assets, including Shepherd Offshore's Neptune Energy Park, a 60-acre site with deepwater berths, heavy-load pads, and advanced manufacturing facilities. Smulders, Europe's leading fabricator for UK and

European Projects, is in close proximity to Shepherd Offshore, the Port of Tyne and leading companies such as Siemens Energy in Newcastle.

On the River Wear, Port of Sunderland has a wealth of experience in handling all types of offshore vessel from the smallest survey ship to a large cable layer. The port can support the requirements of the sector with heavy lift craneage, deep water berths close to open sea, warehousing, and ample space ready for development.



Table 3: The North East England Ports System in European Context³

Port	Quayside Length (m)	Functional Role
North East England port system (composite)	>8,000 and growing	Distributed: manufacture, fabrication, marshalling, Operations & Maintenance, installation, export
Esbjerg (DK) ⁴	1,200	Marshalling, installation, logistics, Operations & Maintenance
Eemshaven (NL) ⁵	5,293	Marshalling, Operations & Maintenance
Cuxhaven (DE) ⁶	1,250	Marshalling, fabrication, Operations & Maintenance

From Teesworks' scale and speed to Blyth's innovation ecosystem, to the Tyne Corridor's strategic gateway role, the North East's ports demonstrate how integrated maritime infrastructure, industrial land, and policy incentives such as Industrial Strategy Zones² can anchor offshore wind supply chains, attract multi billion pound investment, and deliver transformative regional economic growth.

Impressive as they are individually, together, the ports of North East England could form an internationally significant composite asset base greater than the sum of its parts.

Across the four rivers, North East England offers a combined offshore wind-handling asset base with more than 8,000m of quayside, backed up by significant laydown areas and site facilities including heavy lift capabilities. Taken together,

this places the region as potentially the most capable offshore wind port systems in Europe by physical infrastructure footprint.



Few regions in Europe combine the same breadth of port capability across such a tight geography. Within a 50-mile coastal arc, North East England offers the innovation, manufacturing, fabrication, assembly, logistics and Operations & Maintenance capabilities typically spread across multiple regions or even countries.

However, the full potential of this composite asset base is not yet realised. Limited coordination means operational,

and investment decision-making tends to take place at the level of individual ports rather than considering the wider ports system. Building on efforts already underway to foster collaboration between ports of Tyne, Blyth and Sunderland, and Newcastle Airport to boost regional growth and green credentials. Through the signing of a Memorandum of Understanding (MOU) the North East Ports Partnership aims to strengthen global connectivity, drive investment, accelerate the

transition to a net zero economy, and raise the North East's profile as a world-leading hub for sustainable trade and innovation.⁷

A more joined-up approach across the entire region of North East England, potentially incorporating lessons drawn from other composite port systems such as Rotterdam could allow specialisation, unlock the scale advantages, and make the best use of the existing and future port infrastructure.

² Ministry of Housing, Communities & Local Government (2025) 'Industrial Strategy Zones Action Plan', 23 Jun. [online] Available at: <https://www.gov.uk/government/publications/industrial-strategy-zones-action-plan/industrial-strategy-zones-action-plan> [Accessed 29 September 2025].

³ Data on European ports based on available sources and may not reflect expansion plans

⁴ Port Alliance (n.d.) 'Port Esbjerg'. [online] Available at: <https://port-alliance.eu/partners/port-esbjerg/> [Accessed 29 September 2025]. CECP (n.d.) 'Offshore Wind Hub - Port Esbjerg' (presentation). [online] Available at: https://www.cecp-eu.in/uploads/documents/events/57/PPT_Port_Esbjerg.pdf [Accessed 29 September 2025].

⁵ Groningen Seaports (n.d.) 'Eemshaven: Main Hub in Offshore Wind Industry' (brochure). [online] Available at: <https://www.groningen-seaports.com/wp-content/uploads/Offshore-wind-brochure-Eemshaven.pdf> [Accessed 29 September 2025].

⁶ Under expansion: DEME Group (2024) 'DEME awarded contract for construction of offshore wind terminal in the Port of Cuxhaven' (press release), 27 Nov. [online] Available at: https://live.euronext.com/sites/default/files/company_press_releases/attachments/2024/11/27/cpr01_hugin_P2024%20Contract%20Cuxhaven%2020241127%20ENG.pdf [Accessed 29 September 2025]

⁷ North East Combined Authority 'North East Mayor, Kim McGuinness, signs landmark agreement with North East ports and airport to boost regional growth and green credentials. [online] Available at: <https://www.northeast-ca.gov.uk/news/economy/north-east-mayor-kim-mcguinness-signs-landmark-agreement-with-north-east-ports-and-airport-to-boost-regional-growth-and-green-credentials> [Accessed 17 February 2025]

2.5

Research & Development, skills, and innovation ecosystem

North East England hosts the UK's most complete regional innovation ecosystems for offshore wind, combining advanced test infrastructure, university-led Research & Development, and targeted skills provision. The Energi Coast Innovation Group led by Durham University is explicit in its aim of positioning North East England at the forefront of UK offshore wind innovation.

At its core is the ORE Catapult's National Renewable Energy Centre in Blyth, a nationally significant asset supporting full-scale testing of blades, drive trains and electrical systems, alongside offshore demonstration facilities for real-world technology validation.

The region's university network contributes research across key areas of the offshore wind value chain. Durham University's Energy Institute leads work on power systems and grid integration, Newcastle University's Sealab focuses on marine robotics and digital monitoring, and Port of Tyne's Maritime Innovation Hub supports automation and operations innovation. Relevant research is also underway at Northumbria University, particularly in composite materials and structural performance. These centres work closely with industry, translating Research & Development into deployment.

This innovation base is reinforced by regional investment in skills and ambition for the future workforce, evidenced by North East Combined Authority's New Deal for North East Workers. The Energy Central Campus in Blyth, a partnership between Advance Northumberland,



Port of Blyth, Northumberland County Council and the Offshore Renewable Energy (ORE) Catapult, provides clean energy-focused education across levels, from school outreach to PhD, supported by universities, industry, and local growth agencies. In 2025 the North East Combined Authority invested in Newcastle College Energy Academy to expand provision into offshore wind.

Teesside University has strong links with offshore wind developer RWE and the Sofia wind farm with initiatives designed to attract students into a career in the offshore wind industry including supporting a Women in Engineering

scholarship programme and an Engineering Innovation Competition for students.

Similar partnerships between academia and industry can be seen in relation to testing and validation. Since 2015, Newcastle University has been one of Siemens' strategic Principal Partner Universities and are part of Siemens' co-ordinated programme of academic engagement.

Alongside publicly funded education initiatives, private specialist skills providers also have locations in the region including 3t, RelyOn, Port Training Services and The Wind Academy.

3

Vision for 2035

The Vision statement builds on the capabilities outlined in the previous section and aligns with the ambition of stakeholders in North East England to set a direction of travel for offshore wind industrialisation.

Vision statement:

“North East England will define the next phase of offshore wind industrialisation in the UK. Its manufacturing strength, globally significant port system and proud innovation culture will set the standard in full-system offshore electrical solutions and lead the development of deeper-water technologies for global markets.”

From here to 2035: Delivering the Vision

Delivering on North East England's vision to define the next era of offshore wind industrialisation will require the full weight of its assets: maximal development of the offshore wind Area of Opportunity, an efficient and coordinated port system, cutting-edge manufacturing capability, and a complete electrical systems offer spanning cables, installation, substations, and grid integration.

This industrial base is reinforced by a strong skills base, globally leading supply chain, and a distinctive regional innovation culture, from a world-class testing at Blyth to industry-embedded university research in power systems, robotics, and Operations & Maintenance.

The mid-2030s will see North East England leading globally in

integrated offshore electrical solutions, pioneering deeper-water technologies, and exporting high-value expertise to markets worldwide. Its ports will anchor national energy resilience while supporting international supply chains and exports, ensuring the region's leadership will define the future of the UK's offshore wind economy.

The offshore wind delivery powerhouse: aligning regional leadership with national objectives

The North East England is setting out to lead delivery of the UK’s offshore wind ambition and agenda for the next 10 years and beyond. Our goals, ambitions and priorities are captured in a strategic frame that built on three integrated components:

Market-facing growth plays

Offshore wind market-focused industrial propositions where the region can deliver national-scale impact. These include:

- **End-to-end electrical systems powerhouse:** anchoring the UK’s offshore electrical infrastructure through cable manufacture, HVAC / HVDC integration, and installation services capability.
- **Deepwater Vanguard:** leading the UK in deepwater fabrication and assembly, with infrastructure and innovation targeted at the next-generation fixed bottom projects and floating technologies.

Capability growth plays

Cross-cutting industrial specialisms of equal strategic relevance to the market-facing plays: capabilities that drive regional employment and growth, reinforce the primary propositions, and unlock additional value, including:

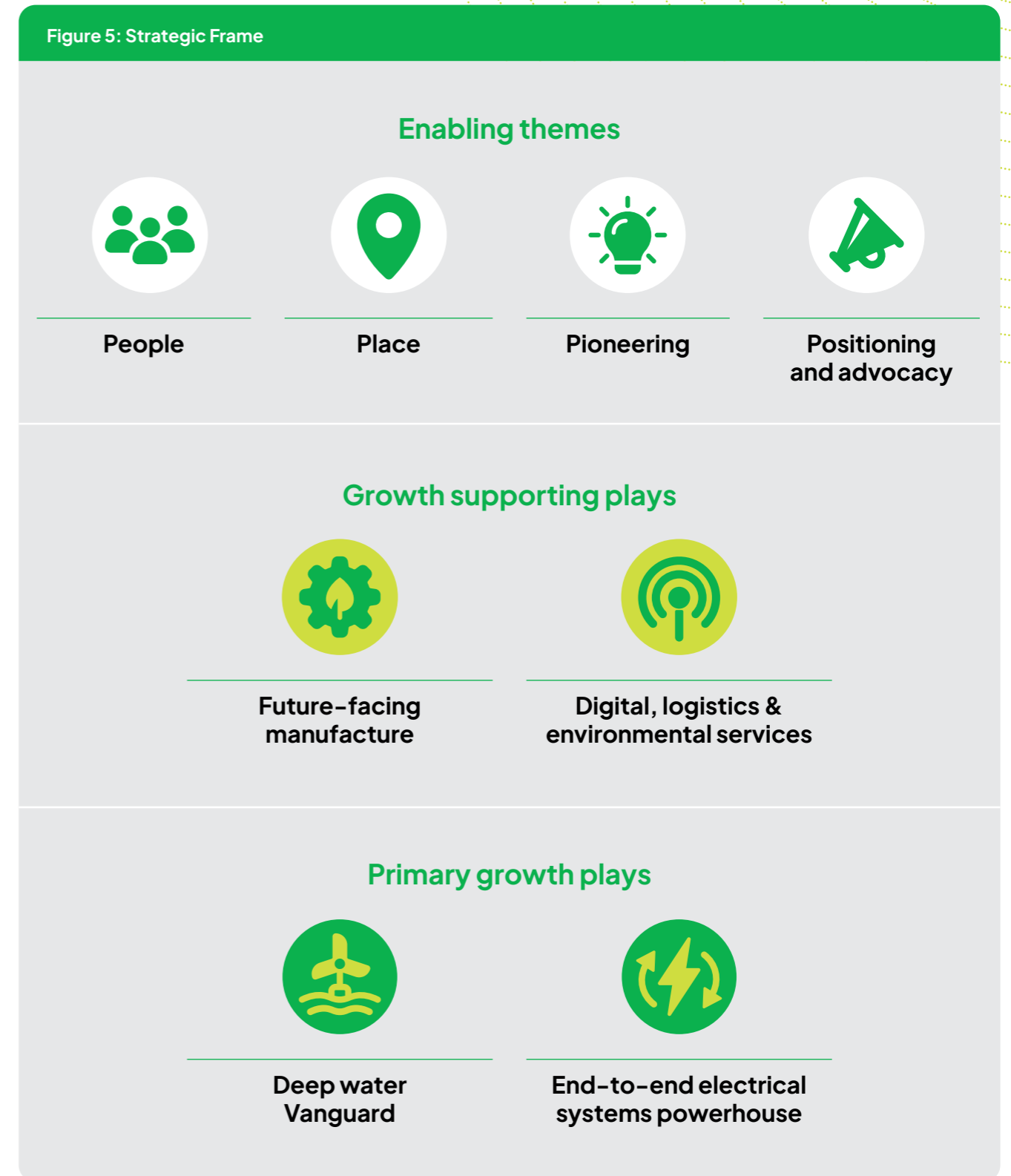
- **Future-facing manufacture:** advanced components, smart fabrication, and sustainable materials.
- **Digital, logistics and environmental services:** capitalising on regional data science and robotics strengths to offer next-generation Operations & Maintenance and survey capability.

Enabling themes

The foundations of delivery, comprising:

- **People:** realising a once-in-generation opportunity for workers in North East England through integrated technical skills, transition pathways, and workforce resilience.
- **Place:** coordinated infrastructure, land-use, and spatial planning.
- **Potential:** investment models, financial mechanisms, and risk-sharing approaches.
- **Pioneering:** innovation scale-up, piloting and technology commercialisation.
- **Positioning and strategic advocacy:** ensuring the region is recognised and supported as a nationally significant delivery partner, not a peripheral player.

Figure 5: Strategic Frame



4.1

Market-facing growth plays

4.1.1



Market-facing growth play: deepwater vanguard

Globally, over the coming decades, offshore wind is moving into deeper water, and the UK needs regional industrial capacity that can respond. As an emerging offshore wind manufacturing heavyweight with world-class infrastructure, North East England is primed to play a leading role in this new frontier.

To be clear, floating wind is an important part of this play, but this is not simply a floating wind proposition. Aligned to but

broader than the Industrial Growth Plan's Industrialised Foundations and Substructures priority area, the Deepwater Vanguard play encompasses all technologies that extend the reach of offshore wind into deeper waters, including XXL monopiles, jackets and next-generation bottom-fixed solutions. North East England can handle the largest components, has the manufacturing capability to unlock serial fabrication of exportable components, and in the long term can scale port infrastructure to meet deepwater demands. Critical assets include Teesworks, PD Ports, Port of Tyne, Able Seaton, and Port of Blyth, as well as land banks and logistics

corridors that support modular assembly and just-in-time delivery.

Targeted innovation in the subsea sector and crucial enabling technologies such as dynamic cables is already underway, supported by test facilities and strong industry-university collaboration. By investing strategically, this play positions the region as the UK's lead component manufacturing hub for deepwater technologies, a role that will grow in importance as leasing areas around the country move further offshore and conventional fixed-bottom infrastructure approaches its physical limits.

4.1.2



Market-facing growth play: end-to-end electrical systems powerhouse

North East England is uniquely positioned to anchor the UK's offshore electrical systems supply chain. It is arguably the UK's strongest route to a fully integrated offer across the value chain, from subsea cable design, manufacturing and installation to high-voltage substations and grid integration. With the offshore grid becoming more complex and capital-intensive, the strategic value of this capability is becoming ever clearer.

A flagship development is the new JDR Cable Systems facility at Cambois, a £130 million investment that will deliver the UK's only start-to-finish high-voltage subsea cable manufacturing plant. This sits alongside JDR's existing facilities in Hartlepool and on the River Tyne. A strong regional base of electrical engineering companies, systems integrators, and offshore vessel operators, giving the region the rare ability to execute full-package delivery. Major academic and Catapult-backed Research & Development is focused on power electronics, grid resilience, and systems testing, reinforcing the region's ability to innovate as well as deliver.

This growth play aligns directly with national priorities under the Offshore Wind Industrial Growth Plan and addresses known bottlenecks in export cable supply and HVDC integration.

North East England has the assets, workforce and innovation partnerships needed to turn electrical systems capability into sovereign capacity with export potential extending into Northern Europe and beyond.

⁸ JDR Cable Systems (2022) 'JDR Cables starts construction on £130m subsea cable facility' (press release), 8 Nov. [online] Available at: <https://www.jdr-cables.com/news-centre/press-releases/jdr-cables-starts-construction-on-130m-subsea-cable-facility>,1085 [Accessed 29 September 2025]. JDR Cable Systems (n.d.) 'Global Presence - Hartlepool'. [online] Available at: <https://www.jdr-cables.com/about-jdr/global-presence> [Accessed 29 September 2025].



Profile

JDR Cable Systems: powering the UK's offshore grid from North East England

JDR Cable Systems' facilities in North East England at Hartlepool, on the River Tyne and the £130 million new plant at Cambois form a nationally significant industrial asset in the delivery of offshore wind transmission systems. The Hartlepool facility, already a key manufacturing site for array and export cables, provides operational continuity and deep fabrication expertise. It will soon be joined by a 69,000 m²

high-voltage subsea cable plant at Cambois, designed to produce 132 kV+ static and dynamic subsea cables, with capacity to scale for floating wind⁸.

The Cambois site is supported by the UK Government's Offshore Wind Manufacturing Investment Scheme and will create 171 direct jobs, while safeguarding hundreds more across JDR's North East England operations. It will be the only UK site capable of full start-to-finish subsea HV cable manufacture, including Continuous Catenary Vulcanisation technology for advanced cable performance. Development of JDR's AHEAD

dynamic cable system, already tested to over 1.5 million load cycles, positions the firm at the forefront of floating wind interconnection.

JDR exemplifies the region's capability to anchor the UK's offshore electrical system supply chain. Together, the Hartlepool and Cambois facilities provide loci for growth, de-risk national transmission bottlenecks, provide export-ready products and expertise, and connect directly into regional skills, innovation, and port infrastructure. These integrated sites reinforce the region's claim to be the UK's full-service offshore electrical systems hub.



Profile

Smulders & Siemens Energy

On behalf of Inch Cape Offshore Limited, Smulders and Siemens Energy were responsible for the construction of an Offshore Transformer Module (OTM) with its associated jacket for the Inch Cape Offshore Wind Farm.

An example of the local expertise used to execute nationally significant projects, over the course of approximately 18 months, a team of more than 250 outfitted and assembled Siemens Energy Offshore Transformer Module (OTM®) and its 68-metre jacket foundation at the Smulders yard in Wallsend, Newcastle. Around 80 local UK sub-contractors supported the

project with work that included lifting, scaffolding, engineering, and coating.

The close proximity between Smulders and Siemens Energy has enabled the River Tyne to play a critical role in nationally significant projects. In parallel the Port of Blyth is supporting the export cable installation for Inch Cape, underlining the collective capability of the North East.

4.2

Capability growth plays

4.2.1



Capability growth play: future-facing manufacture

Future competitiveness in offshore wind depends on how components are made. Our manufacturing base is well-placed to support the transition to smart fabrication systems, advanced materials, and low-carbon processes. Rather than a standalone industrial niche, this is a horizontal enabler, relevant across electrical systems, fabricated deep-water structures, and wind turbine generators.

As demonstrated by SeAH Wind's new XXL monopile factory on Teesside and Smulders' foundation

and topside assembly facility in Wallsend on the Tyne, the region has existing strengths in offshore wind relevant steel manufacture and the ability to attract major inward investment. The wider region is well placed to build on its capabilities in fabrication, welding technologies, modular assembly, and digital twin applications, with innovation support from ORE Catapult and university centres in manufacturing automation. As well as the skills base and attractive sites for investment by Original Equipment Manufacturers (OEMs) across the supply chain, there is also a clear opportunity to deploy AI-enabled quality control, robotics, and smart welding across regional yards,

improving productivity and enabling cost-competitive scaling of high-value components.

The future-facing manufacture play aligns with the UK's wider industrial strategy and supports national efforts to re-shore critical manufacturing inputs, particularly where future demand (e.g. large-diameter monopiles, floating substructures, electrical modules) will exceed current capacity. In North East England, there may also be potential to integrate low-carbon steel and clean energy inputs through proximity to CCUS and hydrogen-linked projects on Teesside.

4.2.2



Capability growth play: digital, logistics and environmental services

As offshore wind projects grow in complexity and distance from shore, the value of digital tools, data-driven operations, and environmental intelligence increases significantly. We are already home to a growing cluster of companies and research teams specialising in marine robotics, digital twin technologies, asset monitoring, and environmental data services, many of which

have applications across survey, Operations & Maintenance, and consenting processes.

This play builds on that base to position the region as a centre of excellence in offshore digital logistics and environmental services. Key assets include robotics test facilities, sensor design capabilities at Durham and Newcastle universities, AI Growth Zones, the Digital, Autonomous and Robotics Engineering (DARE) Centre and data-led SMEs already working in the sector. Opportunities exist to integrate digital innovation into vessel logistics, predictive

maintenance, remote inspection, and marine ecology monitoring, offering both operational savings and reduced environmental impact.

These capabilities are high-value, exportable service offerings within the offshore wind sector and other markets, especially as international developers under cost pressure seek to optimise costs and de-risk assets. By focusing on scalable, modular service models and open-data platforms, North East England can secure a distinctive role in the global offshore wind knowledge economy.

4.3

Enabling themes

4.3.1



Enabling theme: people

Delivering offshore wind at the scale envisioned will require a pipeline of skilled workers, re-training opportunities for transitioning from adjacent sectors, and strong links between education and industry. We are already responding to this challenge with integrated skills initiatives anchored around real-world demand.

The Energy Central Campus in Blyth, the Newcastle College Energy Academy and the Teesworks Skills Academy are three flagship examples. The regional skills offer is backed by FE and HE partnerships, employer-led course development, and alignment with STEM outreach programmes to widen participation.

As new industrial capacity comes online, this workforce offer must scale in both quantity and specialisation. Priorities include electrical and mechanical engineering, vessel operations, fabrication skills, and project logistics, all of which the region is already targeting. Getting this right will support local economic inclusion and help address national labour shortages across the offshore wind sector.

4.3.2



Enabling theme: place

Offshore wind industrialisation does not happen in abstract space. It happens in ports, factories, assembly yards, and logistics corridors. It also happens at sea, where North East England holds significant untapped offshore wind energy resources. Coordinated spatial planning and infrastructure investment are therefore essential to unlocking growth plays at scale.

North East England's unique strength lies in its composite port system. From Blyth to Teesside, the region's four rivers together offer deepwater access, heavy-lift capability, and quayside-adjacent development land. This strategy calls for more deliberate coordination of infrastructure development, land release, and utilities investment, particularly in zones where multiple growth plays overlap, such as the electrical systems cluster between Cambois and Hartlepool, or deepwater fabrication sites at Tyne, Able Seaton, and Teesworks.

National infrastructure decision making and funding must better recognise the integrated nature of this regional port system. A coordinated regional pipeline of infrastructure upgrades, backed by planning certainty and commercial alignment, will help de-risk private investment and create the conditions for industrial scale-up.

4.3.3



Enabling theme: potential

The scale of opportunity in offshore wind is matched by the scale of capital investment required. Delivery at the level envisioned by this strategy will need investment models that support early-stage commercial risk, infrastructure enabling works, and accelerated deployment of innovation.

North East England's already has experience in deploying blended finance approaches. New mechanisms are needed to scale investment into fabrication, port redevelopment, and electrical systems. This includes de-risking pre-commercial technologies such as floating platforms, developing revenue certainty models for anchor tenants, and supporting regionally significant first movers with better access to public co-funding. The experience of securing regional and national buy-in and setting the scene for investment in CCUS and hydrogen projects on Teesside may be transferable.

Critical to this enabling action is improving the bankability of key projects, whether through innovation-linked procurement, simplified planning pathways, or long-term revenue models that reward integrated supply chain offers. This strategy proposes stronger links with national investors including The Crown Estate, National Wealth Fund, Great British Energy, export finance agencies, and investor networks, positioning the region as a place where low-carbon infrastructure capital can be deployed with confidence and visibility.

4.3.4



Enabling theme: pioneering

The industrial history of North East England shows that innovation is a defining regional characteristic. The region has a long and proud history of solving applied industrial challenges, and that mindset continues today through test sites, research partnerships and technology demonstrators focused on real-world offshore wind delivery.

The ORE Catapult site at Blyth is the UK's most advanced centre for offshore wind Research & Development, with full-scale turbine and blade testing infrastructure and open-access collaboration spaces. Regional universities contribute cutting-edge work on robotics, subsea monitoring, materials science, and power electronics, often in partnership with local firms. The priority now is to scale innovation beyond the lab.

This enabling action builds on the successes of the TIGGOR (Technology, Innovation and Green Growth and Offshore Renewables) innovation and supply chain programme that has supported the growth of innovative businesses such as SMD and Kinewell. A further example of a private and public sector partnership, the programme is primarily funded by the North East Combined Authority and delivered in partnership with ORE Catapult, EDF Renewables and Equinor.

The focus here is on commercialisation: supporting pilot deployment, demonstration environments, and routes to procurement for high-potential technologies. Regional innovation funds, industrial testbeds, and streamlined pathways for trialling new products in live environments will help move concepts from prototype to production. In a delivery-led industrial strategy, innovation must not sit on the margins.





Profile

**ORE Catapult
Blyth: testing at the
frontier of next-gen
offshore wind**

The turbine testing facility at ORE Catapult's National Renewable Energy Centre in Blyth, is being transformed by an £85.6 million UKRI investment to expand its

blade test hall to support blades up to 150 m, with future capacity up to 180 m, and to upgrade its drive train rig from 15 MW to 23 MW, scalable toward 28 MW. Once complete by 2028 it will offer the most comprehensive integrated testing capability globally.

The site already supports at least 30 new skilled local jobs

and annually hosts five PhD-level researchers, aligned with development ambitions across electrical systems and floating. As a partner of the Energy Central Campus, it also connects innovation infrastructure with next-generation training facilities, supporting alignment with regional workforce development.

4.3.5



**Enabling theme:
positioning and
strategic advocacy**

Stakeholders across North East England are clear: we must not wait to be allocated a role in national offshore wind strategies, it must define and assert its own. This strategy reflects that shared intent to position North East England as a nationally significant delivery partner, with distinctive contributions that go beyond geography or heritage.

Strategic advocacy involves coordinated messaging and a proactive stance in national forums, from UK cluster coordination to trade missions, attendance at internationally recognised event and funding competitions. North East England already has the evidence base to make its case. It has depth and breadth of port capability, potentially world-leading electrical systems capability, and a pragmatic, delivery-focused culture. Turning this compelling industrialisation story into national-level impact demands clear messaging and alignment behind

the message across regional and local government, industry leaders and coordinating institutions.

This enabling theme also includes regional narrative-shaping, benchmarking against international leaders, and clearer articulation of North East England's offer to investors, OEMs, and government departments. The core of the message is simple: if the UK is serious about delivering offshore wind at scale, it must work with the places that can make it happen, and North East England fully intends to claim that role.



Pathway to 2035: agendas for action

This section sets out a delivery framework for our offshore wind industrial strategy. Building on the region's distinctive capabilities and ambitions, it identifies a focused set of strategic priorities or **action agendas**, programmes of targeted intervention intended to unlock investment, remove barriers, and accelerate delivery across the value chain.

5.1

Action agendas

While the strategic frame outlined in Section 4 defines where we can lead industrially, the action agendas define how that leadership will be realised in practice. Each represents a coherent set of activities, spanning infrastructure, supply chain capability, skills, finance, and global positioning.

All cut across multiple growth plays, reflecting the integrated nature of the regional offshore wind economy and the need for coordinated action.

The figure below illustrates how the action agendas cut across the strategic objectives. Note that the figure shows only the most significant points of intersection. Almost all agendas touch all the key strategic themes in some way.

Figure 6: Cross Cutting Action Agendas

Action agendas	Enabling themes	Platform growth plays	Market-facing growth plays
Power the future Own the offshore power cable and electrical systems value chain			
Build at scale Enable industrial-volume fabrication of next-generation components			
Think below the surface Anchor UK leadership in subsea, survey and digital marine systems			
Four rivers, one mission Build a coordinated port and logistics system for industrial-scale delivery			
Equip the workforce Build modular, place-based learning systems for an industrial-scale offshore wind economy			
Back the builders Unlock capital for industrial growth at every level of the offshore wind supply chain			
Compete globally Export North East capability, shape national strategy, and grow through spillovers			

By organising the strategy's interventions around these action agendas, we can align stakeholders, target resources, and build delivery momentum over the next decade. Each priority is summarised below, with indicative actions, participant actors, and timelines. A more comprehensive breakdown of these

actions into a series of 'sub-actions' can be found in Appendix 1

Each proposed action is prioritised, assigned an owner, and placed in broad budget bands. We also suggest but do not quantify some illustrative KPIs. These proposals are illustrative and are considered

a reasonable first pass but are highly contingent on a wide range of external factors and should be carefully validated and considered before implementation. Indicative programme start dates are staggered to manage administrative load, with all programmes underway by the end of 2027.

Table 4: Action agenda legend

Priority			Scale*	
P1	Critical path	12–18 month	£	<£5m
P2	Enable	24–36 months	££	£5–25m
P3	Develop/scale	36 months+	£££	>£25m

*indicative overall cost of realising goals, not an assigned budgetary expense or commentary on funding commitments.

5.1.1

Action agenda: Power the Future



Objective

Own the offshore power cable and electrical systems value chain.

Rationale

North East England combines port linked land, test infrastructure, and embedded electrical expertise, arguably offering the UK's clearest route to integrated cables, substations, and grid interfaces.

Action summary

Target integration and investment: safeguard cluster sites, expand open access HVDC/cable test capacity, and attract installation/operators, closing bottlenecks in vessels, systems integration, and grid innovation.

Table 5: Power the Future agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
PF1 Create Simplified Planning Zones to encourage cluster investment and development	P1	Planning Authorities & Ports (OEMs)	Q3-2026	££	No. of acres designated through simplified planning
PF2 Expand HVDC/cables test capacity (open-access)	P1	ORE Catapult (UK Research & Innovation; industry)	Q3-2026	££	No. rigs/upgrades; No. projects/yr
PF3 Cable-installation/operator soft-landing package	P2	Ports / Cluster	Q4-2026	£	No. operators co-located; no. FTE
PF4 Offshore substation integration capability (end-to-end)	P3	Industry consortia (Universities)	Q4-2027	££	First integrated systems contract



5.1.2

Action agenda: Build at Scale



Objective

Enable industrial volume fabrication of next generation components.

Rationale

Multiple yards, skilled labour and port adjacent sites provide a strong base; leadership now hinges on serial production in secondary steel, transition pieces, XXL monopiles, jackets and deepwater structures.

Action summary

Upgrade processes and throughput: deploy advanced welding and digital QA, stand up serial transition pieces and innovative jacket lines (such as floating designs and associated fabrication), and align land, power and crange so high throughput operations meet UK and export demand.

Table 6: Build at Scale agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
BAS1 Robotic/laser/vacuum welding + digital QA roll-out	P1	Fabricators (High Voltage Manufacturing Catapult; ORE Catapult; OWGP)	Q3-2026	££	Cycle-time -X%; defects -X%
BAS2 Transition Piece / innovative jacket serial production lines (On-time-in-full + skills)	P1	Yard operators (Combined Authorities)	Q3-2026	£££	No. serial lines; no. units/yr
BAS3 Develop cluster co location incentives near hubs	P2	Local Authorities (landowners)	Q3-2026	£	No. firms co-located; logistics cost -X%
BAS4 Demo production run for deepwater substructures	P2	Industry consortia (Catapults)	Q4-2027	££	First run; lessons published

5.1.3

Action agenda:
Think Below the Surface



Objective

Anchor UK leadership in subsea, survey and digital marine systems.

Rationale

The region already hosts leading autonomous, digital, and environmental players with export ready capability across survey, monitoring, and subsea systems.

Action summary

Commercialise and cluster: fund near market pilots, bundle turnkey offers (subsea + digital + environmental), and strengthen Research & Development links to deliver integrated, developer ready packages for deepwater markets.

Table 7: Think Below the Surface agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
TBS1 AI/autonomy/digital inspection commercialisation calls	P1	SME consortia (UKRI)	Q3-2026	£	No. demos: products market-ready
TBS2 Trade activity and inward Investment promotion to Attract Operations & Maintenance activities and subsea firms to the region	P1	Combined Authorities (Local Authorities, Department for Business and Trade)	Q3-2026	£	No. arrivals/expansions
TBS3 Shared marine test/validation assets	P2	ORE Catapult (Local Authorities)	Q4-2026	££	Asset commissioned; % utilisation
TBS4 Turnkey environmental services offer for developers	P2	Industry consortia (NOF)	Q1-2027	£	Framework wins



Profile

TechnipFMC Newcastle: enabling offshore wind through subsea integration

TechnipFMC's Newcastle hub applies decades of subsea engineering, manufacturing, and project execution expertise to enable offshore wind developments, with particular strength in deepwater and floating applications. The site

integrates systems engineering, dynamic cable lay-up and termination, and testing services, with a proven track record in delivering subsea systems for harsh environments.

Established in 1976, Newcastle has supplied over 4.5 million metres of umbilical systems worldwide and employs 315 personnel. This includes a significant proportion in skilled engineering roles, helping to keep critical subsea know-how within the UK while scaling the

solutions required for floating offshore wind.

Recent projects span major deepwater developments and participation in strategic UK energy transition initiatives, such as the Northern Endurance Partnership for Net Zero Teesside. TechnipFMC Newcastle continues to reinforce the North-East's contribution to the UK's offshore wind and subsea energy sectors.

5.1.4

**Action agenda:
Four rivers, one mission**



Objective

Build a coordinated port and logistics system for industrial scale delivery.

Rationale

The Blyth–Tyne–Wear–Tees system is the UK’s most extensive and functionally diverse; its value multiplies when operated as a coherent whole across

manufacturing, marshalling, Operations & Maintenance, and installation.

Action summary

Develop port cooperation initiatives, and co invest in craneage, laydown, grid and deepwater berths with multi port “logistics as a service.”

Table 8: Four rivers, one mission agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
FR1 Continue to develop port collaboration and coordination	P1	Ports (Combined Authorities, Energi Coast/ NOF)	Q3–2026	£	New forms of collaborative working, e.g. joint pipeline & specs
FR2 Enabling infrastructure: craneage/laydown/grid/berths at priority sites	P1	Ports (National Wealth Fund; Department for Transport / DESNZ)	Q3–2026	£££	No. assets delivered; % utilisation
FR3 Ensure availability of industrial real estate	P2	Combined Authorities	Q3–2026	£	Hectares safeguarded; No. fast-track tenancies
FR4 “Logistics-as-a-service” multi-port offer (incl. shared warehousing/spares)	P2	Ports (Energi Coast/NOF)	Q4–2026	££	No. developer frameworks signed

Learning from the Scottish Offshore Wind Ports Alliance (SOWPA):



SOWPA is a collaborative network of Scotland’s offshore wind-ready ports, spanning fabricators, marshalling points, and Operations & Maintenance bases. It drives combined competitiveness by pooling investment ideas, coordinating strategic propositions (via the Strategic Investment Model), and presenting aligned regional messaging to developers and government.

5.1.5

**Action agenda:
Equip the Workforce**



Objective

Build place based learning systems for an industrial scale offshore wind economy.

Rationale

Further Education / Higher Education strengths and specialist providers put the region in a strong position to convert proximity to industry into reliable throughput and transition pathways.

Action summary

Support site adjacent training hubs, drive T level, and Apprenticeship uptake, and run a workforce observatory to match provision to real time demand.

Table 9: Equip the Workforce agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
EW1 Continue support and development of for site adjacent training hubs (Wallsend/Blyth/Tees)	P1	Skills consortia	Q3–2026	££	No. completers p.a.; % employment
EW2 Work to drive participation in T levels and Apprenticeships, including through the Skill and Growth Levy as it develops, and identify gaps to inform piloting of new activity	P1	Combined Authorities & employers (Local Authorities, Department for Education)	Q3 2026	£	No. apprentices p.a.: SME take up %
EW3 Careers education & outreach at scale	P2	Schools/Further Education/ Higher Education (Employers / Local Authorities, Combined Authorities)	Q3–2026	£	No. learners reached p.a.
EW4 Workforce observatory (real-time demand & gaps) bringing together a range of data, evidence, and insights to provide an understanding of current and future skill needs in sector	P2	Market Provider (Employers, Universities)	Q4–2026	££	Quarterly dashboard live

5.1.6

**Action agenda:
Back the Builders**



Objective

Unlock capital for growth at every level of the offshore wind supply chain.

Rationale

Long timelines, capital intensity and thin margins strain conventional finance, risking stalled projects and unnecessary imports.

Action summary

Establish an approach for supporting investors and businesses from innovation → capex → export finance and enable SME bids via guarantees and consortium tools. Effectively promoting strategic sites and capitalising on investment opportunities through existing partnerships in region and with national organisations, including Public Finance Institutions and government.

5.1.7

**Action agenda:
Compete Globally**



Objective

Export North East England's capability, shape national strategy, and grow through industrial spillovers and securing investment opportunities.

Rationale

Strengths in fabrication, subsea and electrical systems are transferable; bundling them creates differentiated export offers and resilience.

Action summary

Launch three export bundles (electrical systems; subsea/digital; fabrication + logistics), provide bid support and market intelligence, and coordinate a unified regional presence at priority global forums.

Table 10: Back the Builders agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
BB1 Parental guarantees / joint-bidding support for SMEs	P1	Energi Coast/NOF (OEMs; Department for Business and Trade)	Q3-2026	£	SMEs qualify for Tier-1 bids
BB2 Finance coordination and support (innovation ↔ capex ↔ export)	P2	Combined Authorities (Department for Business and Trade; Office for Investment; UK Export Finance; National Wealth Fund; Great British Energy)	Q4-2026	£	No. firms supported/yr

Table 11: Compete Globally agenda items

Action	Priority	Lead (support)	Start by	£	Illustrative KPI
CG1 Three export bundles (electrical; subsea/digital; fabrication)	P1	Energi Coast/NOF (Department for Business and Trade; UK Export Finance; RTC North)	Q4-2025	£	Order book by 2027
CG2 International market intelligence	P2	Industrial Cluster (Department for Business and Trade; UK Research and Innovation, Local Authorities, Energi Coast / NOF)	Q3-2026	£	No. supported bids/yr
CG3 Unified regional cluster identity & global events plan	P2	Energi Coast (Industrial Clusters, Combined Authority)	Q4-2026	£	No. major events; pipeline growth

Coordination, monitoring, and evaluation

This strategy sets out a clear plan to position North East England as a national leader in offshore wind industrial delivery. Translating this strategy into outcomes will require effective execution along with a robust approach to tracking progress, assessing impact, and adjusting course as needed.

6.1 Coordinating for delivery

Delivering the strategy demands clear ownership, collaborative delivery models, and coordination across institutions with different mandates, capabilities, and accountabilities.

Our institutional maturity is a strength in this regard. We already demonstrate alignment between public actors (including North East CA and TVCA), industrial leadership through the Energi Coast cluster owned and operated by NOF, and active engagement with innovation, skills, and infrastructure providers.

With appropriate involvement and oversight from both Combined Authorities, industry, innovation and infrastructure stakeholders, the implementation of this strategy should provide a central focus for coordinating and navigating the complex network of affected stakeholders, providing a platform for cross-industry engagement, facilitating developer dialogue, and mediating policy engagement.

Key practical responsibilities to be tackled would include:

- Stakeholder engagement at the local, regional, and national level
- Taking a proactive approach to prioritising, securing, and overseeing funding for key initiatives within today’s complex funding environment
- Monitoring and evaluation of progress against the aims of the strategy
- Assigning ultimate accountability for programme delivery
- The strategy also assumes:
 - Local and regional leadership in areas of devolved control (e.g. planning, skills, infrastructure).
 - Cluster-based coordination of supply chain mobilisation and shared investment.
 - Regional convening bodies (e.g. Energi Coast, Combined Authorities) playing strategic interface roles with national policy and delivery institutions.
 - Firm-level delivery of capital investments, innovation activity, and export readiness, supported by a stable regional policy environment.

While this strategy sets out the case for targeted action, its implementation will require regional stakeholders to translate these agendas into delivery structures and shared accountability. Options such as task-and-finish groups, regional propositions to government, or coordinated investment mechanisms could support that effort. Implementation of this strategy requires more than new institutions. It depends on clarity of purpose, alignment of effort, and strategic confidence in the region’s ability to deliver.

Keeping on track

As implementation moves forward, a proportionate and focused monitoring and evaluation (M&E) framework will be critical. This should enable delivery, demonstrate progress to national partners and investors, and allow the strategy to adapt to changes in market, policy, or technology.

The framework should be based on a concise set of indicators aligned to the strategy’s core goals. These should reflect both direct outputs and system-level change, drawing on existing datasets where possible, and avoiding unnecessary burden. Agreeing 2035 and interim targets since reliable evidence should be part of the strategy start-up process.

A set of proposed indicators is provided in the table below.

A two- to three-year review cycle would enable progress assessments, early learning, and adjustments to delivery priorities. The development of shared reporting tools and baseline data will be a priority early action.

Table 12: Proposed strategy implementation indicators

Domain	Frequency	Immediate Monitoring Challenge
Throughput via North East England ports (manufacture/marshalling/Operations & Maintenance handled in-region)	Quarterly	Define counting rules (what counts as “handled”), reconcile with ports’ schedules, avoid cross-river double counting.
Industrial investment leveraged (plant, equipment, enabling infrastructure)	Quarterly	Validate project lists and cost books; split public vs private; remove double counting on shared assets.
Jobs (direct + transitions)	Biannual	Adopt a single multiplier set; agree local capture by package; confirm provider intake → employment conversion.
Anchor tenants (OEMs / strategic Tier-1s)	Quarterly	Define “anchor” criteria; link to land/utilities milestones and BD/MoUs.
Export value (goods & services)	Annual	Build bottom-up bundle pipelines (Electrical; Subsea/Digital; Fab+Logistics); align with UKEF/Department for Business and Trade opportunities.
Skills throughput (offshore-relevant completers)	Quarterly	Confirm seat capacity, cohort plans, and placement rates with Skills providers.

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Appendix 1: Agenda sub-actions, full list

Below are the sub-actions that support the main actions described in section 5.

8.1

Power the Future – electrical systems value chain

8.1.1

PF1: Simplified Planning Zones

Theme	Priority	Budget Band	Owners	Support
Create Simplified Planning Zones to encourage cluster investment and development	P1, Start by Q3 2026	>£25m	Combined Authorities, Ports	JDR Cable Systems, Siemens Energy, other OEMs
Sub action	Timeline	Notes		
Safeguard land & utilities for factory expansion and integration yards	Now-2027	Maps to FR3		
Provide soft landing packages for cable installers/operators	Now-2027	Also see PF3		
Support investment in full contract chain delivery	Now-2027	With Energi Coast/Department for Business and Trade		
Review business support needs for scale up	Mid term	Link to BB3 “front door”		
Improve visibility of regional offer (BD)	Mid term	Tie to CG1 Bundles		

8.1.2

PF2: Expand HVDC/cables test capacity

Theme	Priority	Budget Band	Owners	Support
Open access rigs, integration trials	P1, Start by Q3 2026	£5-25m	ORE Catapult	UK Research and Innovation, industry
Sub action	Timeline	Notes		
Enhance cables & substation testing (open access)	Mid term	Industry match funding		
Pilot hybrid solutions (grid/BESS/hydrogen co location)	Longer term	With DESNZ/NESO		
Develop integration trials for HVDC systems	Mid term	Supports Allocation Round 8 / 9 bankability		

8.1.3

PF3: Cable Installation & Operator Attraction

Theme	Priority	Budget Band	Owners
Soft landing, finance options, skillstrials	P2, Start by Q4 2026	<£5m	Ports, Cluster
Sub action	Timeline	Notes	
Soft landing for installers (access to port infra and skills)	Now-2027	Align with FR4	
Explore finance options for growing installation capability	Mid term	With BB1	
Launch specialist cable skills programmes	Now-2027	With EW1/EW2	

8.1.4

PF4: Offshore Substation System Integration

Theme	Priority	Budget Band	Owners	Support
End to end substation systems	P3, Start by Q4-2027	£5-25m	Industry consortia	Universities
Sub action		Timeline	Notes	
Position NE firms for complete substation systems		Longer term	Builds on PF2	
Develop design & FAT capability in region		Longer term	Industry academia collaboration	

8.2.2

BAS2: Serial TP/Innovative Jacket Lines

Theme	Priority	Budget Band	Owners	Support
Secondary steel, TP/jacket serial production, workforce upskilling	P1, Start by Q3 2026	>£25m	Yard operators	Combined Authorities, The Crown Estate, National Wealth Fund, Great British Energy, Department for Energy Security & Net Zero
Sub action		Timeline	Notes	
Scale secondary steel, TPs, and jackets		Now-2027	Land & grid via FR2/3	
On-time-in-full improvement programme		Mid term	Linked to BB3 finance tools	
Workforce upskilling for serial production		Mid term	With EW1/2	

8.2

Build at scale – fabrication & manufacturing

8.2.1

8.2.1 BAS1: Fabrication 4.0

Theme	Priority	Budget Band	Owners	Support
Robotic/laser/vacuum welding, digital QA/QC	P1, Start by Q3 2026	£5-25m	Fabricators, Yard operators	High Voltage Manufacturing Catapult, ORE Catapult, Offshore Wind Growth Partnership, The Crown Estate, National Wealth Fund, Great British Energy, Department for Energy Security & Net Zero
Sub action		Timeline	Notes	
Deploy advanced welding systems		Now-2027	Site by site roll out	
Implement digital QA/QC and twins		Now-2027	Training with EW1	
Integrate Made Smarter/Catapult tools		Mid term	Funding linkage	

8.2.3

BAS3: Co location Incentives

Theme	Priority	Budget Band	Owners	Support
Develop cluster co location incentives near hubs	P2, Start by Q3 2026	<£5m	Local Authorities	Landowners
Sub action		Timeline	Notes	
Incentivise supplier clustering near hubs		Mid term	Logistics cost reduction	
Just in time delivery corridors		Mid term	With ports & OEMs	

8.2.4

BAS4: Demo Production for Deepwater Substructures

Theme	Priority	Budget Band	Owners	Support
Demo production runs, export positioning	P2, Start by Q4 2027	£5–25m	Industry consortia	Catapults
Sub action	Timeline		Notes	
Run demo production for jackets/floaters/novel technologies	Longer term		Publish lessons & cost curves	
Export positioning for deepwater fabrication	Longer term		Inputs from CG1	

8.3.2

TBS2: Trade Activity & Inward Investment Promotion

Theme	Priority	Budget Band	Owners	Support
Trade activity and inward Investment promotion to Attract Operations & Maintenance activities and subsea firms to the region	P1, Start by Q3 2026	<£5m	Combined Authorities	Department for Business and Trade, Local Authorities
Sub action	Timeline		Notes	
Co locate Operations & Maintenance and subsea firms	Now–2027		Ties to FR3 land & FR4 services	
Integrate cable & subsea offerings	Now–2027		With PF1/3	

8.3

Think below the surface – subsea, digital & environmental services

8.3.1

TBS1: Commercialisation Calls

Theme	Priority	Budget Band	Owners	Support
AI/autonomy/digital inspection	P1, Start by Q3 2026	<5m	SME consortia	UK Research and Innovation
Sub action	Timeline		Notes	
Fund AI/autonomy pilots	Now–2027		Route to procurement via TBS4/CG1	
Support route to market and standards	Mid term		With OWIC/OREC	

8.3.3

TBS3: Shared Marine Test & Validation

Theme	Priority	Budget Band	Owners	Support
Offshore test capability, university collaboration	P2, Start by Q4 2026	£5–25m	ORE Catapult	Local Authorities
Sub action	Timeline		Notes	
Expand offshore test capability	Mid term		Capital via BB1	
University collaboration framework	Mid term		Durham, Newcastle, Northumbria, etc.	

8.3.4

TBS4: Turnkey Environmental Services

Theme	Priority	Budget Band	Owners	Support
Biodiversity monitoring, analytics, consenting, circular economy	P2, Start by Q1 2027	<£5m	Industry consortia	NOF
Sub action	Timeline		Notes	
Bundle biodiversity monitoring, analytics, consenting services offer	Now-2030		Supports faster consenting	
Develop circular economy services for decommissioning	Longer term		Links to regional Circular Economy capability	

8.4

Four rivers, one mission – coordinated ports & logistics system

8.4.1

FR1: Continue to develop port collaboration and coordination

Theme	Priority	Budget Band	Owners	Support
Governance, data sharing, joint proposition	P1, Start by Q3 2026	<£5m	Port of Blyth, Port of Tyne, Port of Sunderland, PD Ports, Port of Middlesbrough, Able UK	Combined Authorities, Energi Coast (NOF)
Sub action	Timeline	Notes		
Develop and promote a shared “Four Rivers” vision and composite proposition	Now-2027	Align with Combined Authorities’ Local Growth Plans		
Establish NE England Ports governance and information sharing framework (SOWPA learning)	Now-2027	Template principles from SOWPA or other European ports coordination model; legal MoU		
Coordinate tenant alignment and reduce intra regional competition	Mid term	Requires governance set up		
Joint developer engagement calendar and offer	Mid term	Link to CG1 Export Bundles		
Publish common specifications (heavy lift, laydown, utilities) per site	Mid term	Feeds FR2 capex and FR4 service design		

8.4.2

FR2: Enabling Infrastructure

Theme	Priority	Budget Band	Owners	Support
Cranage, laydown, grid, deepwater berths	P1, Start by Q3 2026	>£25m	Port operators	The Crown Estate, National Wealth Fund, Great British Energy, Department for Energy Security & Net Zero, Combined Authorities
Sub action	Timeline	Notes		
Prioritise cranage investments at high growth quays	Now-2027	Capex via co investment vehicle (BB1)		
Expand laydown areas and ground bearing upgrades	Now-2027	Land availability (FR3)		
Secure grid connections and on site power upgrades	Now-2027	Coordinate with DESNZ/NESO		
Develop additional deepwater berths / access improvements	Mid term	Planning & consents		
Shared warehousing/spares hubs (see FR4)	Mid term	Logistics as a service model		

8.4.3

FR3: Safeguard industrial and relevant employment real estate

Theme	Priority	Budget Band	Owners	Support
Ensuring availability of port adjacent industrial sites	P2, Start by Q3 2026	<£5m	North East CA, TVCA	Office for Investment, landowners, Local Authorities
Sub action	Timeline	Notes		
Identify and safeguard strategic hectares across four rivers	Now-2027	Link to PF1 and BAS2		
Develop appropriate mechanism for strategic sites	Now-2027	Speeds tenant FID		
Fast track planning pathways for offshore wind uses	Mid term	With Local Planning Authorities		
Integrate utilities corridors and road/rail access	Mid term	Interlocks with FR2		

8.4.4

FR4: Logistics as a Service

Theme	Priority	Budget Band	Owners	Support
Multi port developer packages, shared warehousing/spares, marine coordination	P2, Start by Q4 2026	£5–25m	Port operators	Energi Coast (NOF)
Sub action	Timeline	Notes		
Design multi port developer packages	Mid term	Port collaboration (FR1) prerequisite		
Stand up shared warehousing/spares & marine coordination	Mid term	Capex via BB1		
Offer heavy lift logistics, environmental monitoring, and control rooms as shared services	Longer term	Align with TBS4		
Export the coordination model	Longer term	Reputation & revenue benefit		

8.5

Equip the workforce – skills & talent pipeline

8.5.1

EW1: Site Adjacent / place-based Skills Hubs

Theme	Priority	Budget Band	Owners	Support
Continued support and development of for site adjacent training hubs (Wallsend/Blyth/Tees)	P1, Start by Q3 2026	£5–25m	Skills consortia	Energy Central, Combined Authorities, Teesworks
Sub action	Timeline	Notes		
Stand up hubs near industrial sites	Now–2027	With employers		
Embed simulators & digital twins	Mid term	Industry co designed curricula		

8.5.2

EW2: T levels and Apprenticeships

Theme	Priority	Budget Band	Owners	Support
Work to drive participation in T levels and Apprenticeships, including through the Skill and Growth Levy as it develops, and identify gaps to inform piloting of new activity	P1, Start by Q3 2026	<£5m	Combined Authorities, employers	DfE, Local Authorities
Sub action	Timeline	Notes		
Pilot levy aligned apprenticeships	Now–2027	Skills & Growth Levy		
Create modular micro credentials for new roles	Mid term	Digital welding; HV; robotics; logistics		

8.5.3

EW3: Careers Education & Outreach

Theme	Priority	Budget Band	Owners	Support
Sector visibility, transition pathways	P2, Start by Q3 2026	<£5m	Schools, Further Education, Higher Education	Employers, Local Authorities, Combined Authorities
Sub action	Timeline	Notes		
Scale outreach and pathways visibility	Mid term	Sector campaigns		
Transition pathways from adjacent sectors	Mid term	Oil & gas, automotive, marine		

8.5.4

EW4: Workforce Observatory

Theme	Priority	Budget Band	Owners	Support
Bringing together a range of data, evidence, and insights to provide an understanding of current and future skill needs in sector	P2, Start by Q4 2026	<£5m	Market Provider	Universities
Sub action	Timeline	Notes		
Build data dashboard	Mid term	Feeds M&E		
Adjust provision dynamically	Longer term	Links to EW1/2		

8.6

Back the builders – finance & investment enablers

8.6.1

BB1: Parental Guarantees / Joint bidding support

Theme	Priority	Budget Band	Owners	Support
SME procurement thresholds, consortia growth	P1, Start by Q3 2026	<£5m	Energi Coast (NOF)	OEMs, Department for Business and Trade
Sub action	Timeline	Notes		
Enable SMEs to meet procurement thresholds	Now-2027	Includes bid bond/PG structures		
Grow consortia (bundle offers)	Mid term	Feeds CG1		

8.6.2

BB2: Finance coordination and support

Theme	Priority	Budget Band	Owners	Support
Innovation → capex → export finance, ramp up working capital	P2, Start by Q4 2026	<£5m	Combined Authorities	Department for Business and Trade, Office for Investment, UK Export Finance, National Wealth Fund, Great British Energy
Sub action	Timeline	Notes		
Coordinate UKRI/OWGP/National Wealth Fund/ UKEF pathways	Mid term	One application route		
Provide ramp up working capital support	Now-2027	Reduces early stage risk		

8.7

Compete globally – exports & positioning

8.7.1

CG1: Export Bundles

Theme	Priority	Budget Band	Owners	Support
Electrical systems, subsea/digital, fabrication+logistics	P1, Start by Q4 2025	<£5m	Energi Coast (NOF)	Department for Business and Trade, UK Export Finance, RTC North
Sub action	Timeline	Notes		
Design three bundled offers with playbooks	Now-2027	Align design to target market needs		
Form export ready consortia	Mid term	UKEF instruments		

8.7.2

CG2: International Market Intelligence

Theme	Priority	Budget Band	Owners	Support
Market intelligence, localisation trends	P2, Start by Q3 2026	<£5m	Industrial Cluster	Department for Business and Trade, UK Research and Innovation, Local Authorities, Energi Coast (NOF)
Sub action	Timeline	Notes		
Commission market intel; localisation trends	Now-2027	Shared with members		
Provide bid support (legal/finance/logistics)	Mid term	Links to BB2		

8.7.3

CG3: Unified Cluster Identity & Global Events Plan

Theme	Priority	Budget Band	Owners	Support
Cluster branding, global events programme	P2, Start by Q4-2026	<£5m	Energi Coast	Industrial Clusters, Combined Authorities
Sub action	Timeline		Notes	
Launch cluster identity & assets	Mid term		Keep apolitical (sector focus), look to Nordic model for inspiration	
Global events programme (WindEurope, ONS, IPF)	Mid term		Joint pavilion approach	

8.8

Governance & policy coordination

Theme	Priority	Budget Band	Owners	Support
Delivery body, policy alignment mapping, M&E, funding navigation	P1, Start by Q4 2025	<£5m	Combined Authorities	Energi Coast (NOF), Ports, Industry, DESNZ, The Crown Estate, Offshore Wind Industry Council / Offshore Wind Growth Partnership
Sub action				Notes
Constitute governance arrangements (Terms of Reference, Project Management Office, workplan)				Delivery planning
Publish & maintain Policy alignment map (Industrial Growth Plan / Allocation Round 8+ / Allocation Round 9 / The Crown Estate / Local Plans / GB Energy)				"Green thread" assurance
M&E framework & baselines; RAG dashboard				Data owners assigned
Funding navigation & propositions to HMG				Supports BB1/3, FR2, PF2

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