From Coast to Cluster:

Why Dorset Matters to the Next Phase of UK Offshore Wind

Image note: Stylised illustration of a multi-sector energy cluster and does not represent any specific project, scheme design, location layout or proposal.

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RenewableUK Global Offshore Wind 2026 was a timely opportunity to reflect on the changing role of offshore wind in the UK, as energy security, regional investment and coastal regeneration become national priorities.

This article explores what that shift means in practice, using the Dorset Clean Energy Super Cluster to show how regional clusters can connect national ambition with local delivery.

Steve Freeman

Offshore wind is being asked to do more

For much of the last two decades, the objectives of offshore wind have been to reduce cost, increase deployment and prove it could become a mainstream source of electricity. That case has now been made, and the UK is a leading example, with offshore wind supplying close to a fifth of its electricity [1].

But the context has shifted. Since the gas shock of 2022, energy has moved to the centre of geopolitics, and clean power has become a core issue for national security [1, 3].

Whilst that debate rages, offshore wind has quietly cut UK spending on imported fuel by an estimated £30 billion [4]. However, offshore wind is now being asked to do more than generate clean power. It must also support energy security, industrial growth and regional investment, and that changes the conversation.

The next phase of offshore wind is increasingly about how projects connect into places and regional strategies [5, 6]. Dorset is one such example, where the Dorset

Council has taken the lead in convening a clean energy cluster locally rather than waiting for national direction.

Shifting policy landscape

Three shifts are reshaping the role of offshore wind in the UK.

1. Clean energy is now directly linked to national resilience.
Making it economically and politically consequential [7]. Volatile gas markets, geopolitical instability and the weaponisation of energy have brought domestic clean power back to the centre of national strategy [8].

2. System integration is becoming investable.
Hydrogen, battery storage, grid flexibility, ports, carbon management and data centres are no longer separate conversations [9, 10]. Rather they're increasingly parts of the same investment proposition [10]. Making the investment case for maximising economic value through the whole system approach a priority.

3. The delivery window is narrowing.
The UK is set to fall short of its 43 GW offshore wind target for 2030, with current forecasts in the mid-30s GW [11]. With energy now a matter of national security, that gap is a strategic risk. But it is only part of the wider risk, because the system that turns clean power into resilience and lasting value is more effective when built in step with wind. So, acting now is critical before that window closes.

Responding to these shifts is the opportunity all clusters offer.

Dorset is breaking the mould

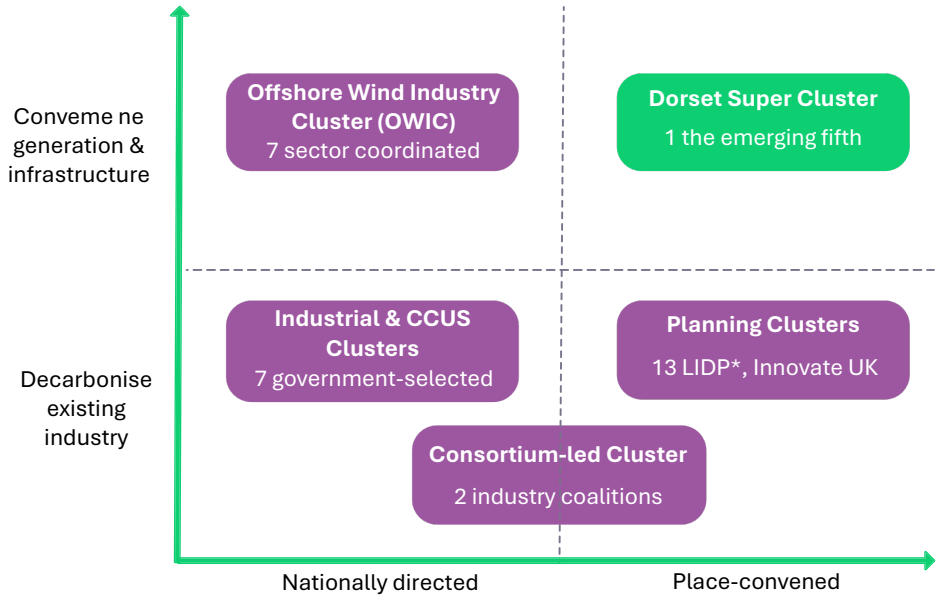
Across the UK, there are broadly four types of energy cluster (Exhibit 1). Some are government-selected industrial decarbonisation clusters. Some are offshore wind clusters coordinated through the sector. Others are consortium-led, or focused on local industrial decarbonisation planning. Each has its value, but the Dorset Cluster offers a slightly different "fifth" type.

> *"The next phase of offshore wind is increasingly about how projects connect into places and regional strategies. Dorset is one such example"*

The Dorset Cluster did not begin with a government designation or a single formal route to market. It emerged from place, geography and necessity - bringing together developers, investors, local authorities, ports and regional stakeholders before formal market mechanisms are fully in place.

Developers and regional partners are not waiting for perfect conditions before acting. They are working to create the conditions for delivery in advance. That means building alignment, surfacing constraints, coordinating timelines and showing how individual projects can add up to a coherent regional proposition. This pre-market coordination could let Dorset move quickly once a route to market opens.

Exhibit 1: *Four types of UK energy cluster (shaded blue), positioned by how they are convened and what they set out to do, with the Dorset Cluster as an emerging fifth (green shading).* ***Source:*** *Author's own analysis, REP Ltd.*



*Local Industrial Decarbonisation Plans

The spatial logic of the Dorset Cluster

The Cluster is centred on Portland Port, which brings together a set of assets that are difficult to replicate nationally (Exhibit 2)[12]. These include, deep-water access, a naturally sheltered harbour, maritime heritage, defence relevance and proximity to major offshore wind opportunities in the South West and the Celtic Sea. It also sits within a geology that includes salt caverns that are ideally suited to green hydrogen and carbon capture storage [13].

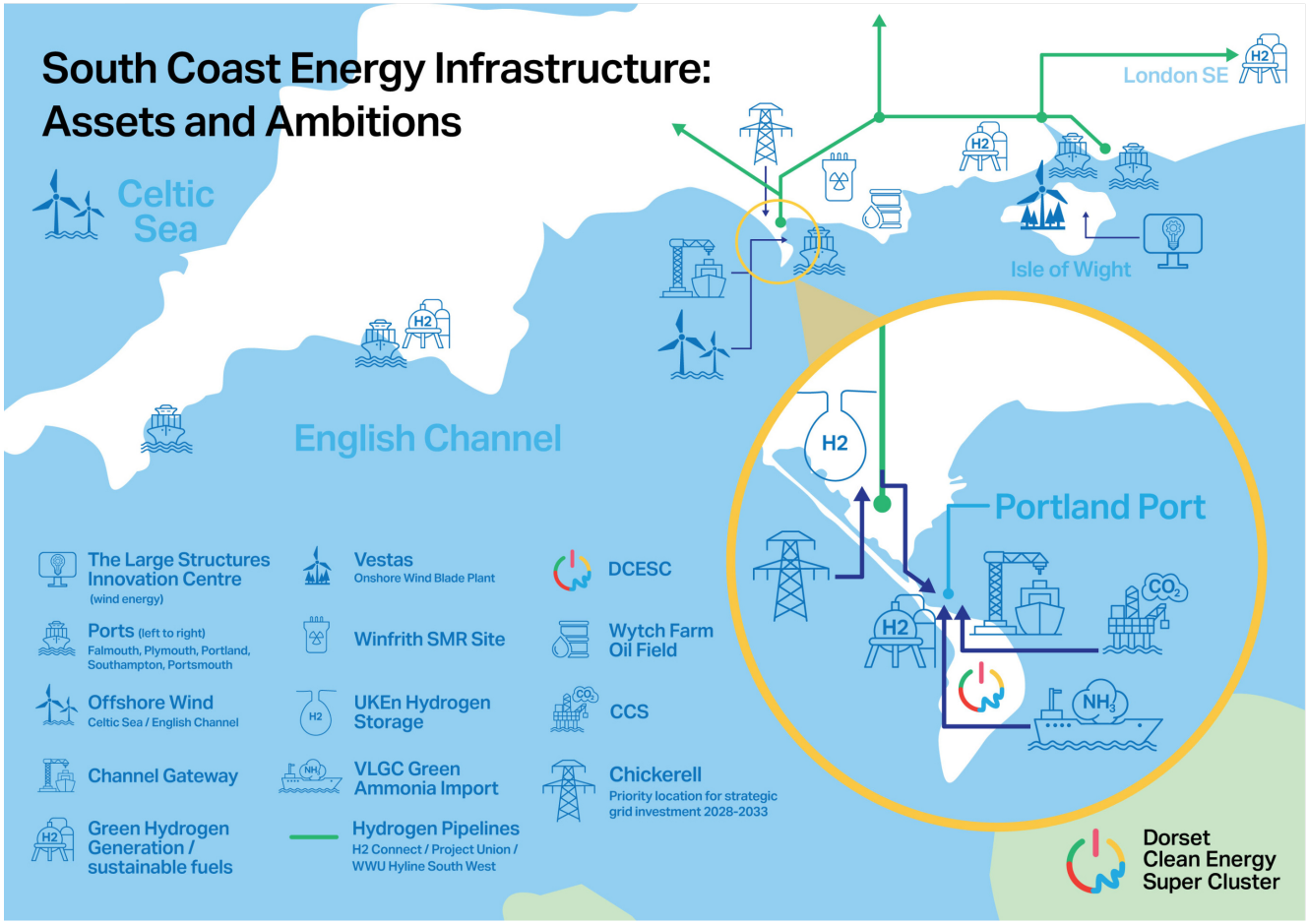
What gives Dorset its strategic relevance is the combination of its assets and its alignment with regional and local needs. The Channel Gateway concept at Portland Port adds to this logic [14]. This proposed £500 million clean energy port has already drawn early backing from The Crown Estate's (TCE) Supply Chain Accelerator Fund (£750,000) and matched funding from Dorset Council (£375,000) [15]. It is designed to serve both fixed and floating offshore wind, to grow the regional supply chain, and to link the English Channel to the Celtic Sea's floating wind market [16].

That bridging role matters because the Channel's fixed-bottom wind can come forward sooner than the Celtic Sea's floating wind, building the supply chain and port capacity that floating can then draw on. Dorset complements the Celtic Sea, and together they strengthen the wider South West clean energy proposition and its supply chain.

National ambition depends on regional delivery

By design, energy policy is top down. National targets are set, the schemes and funding mechanisms follow, and developers and projects are left to deliver against them. But delivery happens in places, where skills, planning authorities, communities, investors and supply chains convene around local infrastructure. Whilst national ambition may be strong, progress often falls behind when coordination between national policy and place is weak.

Exhibit 2: *The Dorset Clean Energy Super Cluster and its main components, centred on Portland Port.*



That gap is now closing, as TCE and the National Energy System Operator (NESO) work to connect national strategy with regional delivery. NESO is doing so through its first Regional Energy Strategic Plans [6], and TCE is aligning its future seabed leasing with them and investing up to £400 million in supply chains and ports across the regions [7]. But these are national instruments reaching down.

Dorset shows what regional delivery looks like when it is built from the place up. And the opportunity is more than clean power. It is inward investment, jobs, skills, supply chain readiness, industrial growth, coastal regeneration and energy security. But those benefits must be earned. They need sequencing and a clear regional proposition, which is what the Dorset Cluster is trying to provide.

A cluster born from necessity

The Dorset Cluster emerged from a very practical local concern. There was anxiety that several major infrastructure projects could arrive at once, placing pressure on housing, roads, services, workforce availability and local communities. For a local authority, that concern is understandable as major infrastructure can create pressure if it is poorly sequenced or poorly explained.

The reality, however, was more nuanced. The projects were not all arriving at the same time. They had different development pathways, different timelines and different pre-market hurdles, and were more likely to develop over ten to twenty years than to land as a single short-term shock.

Instead of seeing these projects as a near-term burden, Dorset saw them as part of a long-term regional pathway. That is an important shift, which turns infrastructure pressure into an investment opportunity. It also shows why place-convened clusters matter. They create a space where regional actors can help shape how projects are sequenced before major decisions are locked in.

Three lessons for policymakers adn investors

The Dorset example offers three wider lessons.

1. Clusters can emerge from places, not just policies. Government designation matters, but it is not the only way clean energy clusters form. Shared geography and geology, shared infrastructure and shared opportunity can also create the basis for coordinated action.

2. Physical place matters for energy security. Dorset's Channel waters suit fixed-bottom offshore wind, a mature and deployable technology that can come forward faster than the floating wind planned for the Celtic Sea. However, the value is not only speed. Development in the Channel would also support the western diversification of the UK offshore wind fleet, helping to balance generation across regions when output is lower in the east [17].

3. Coastal regions hold assets the UK needs. Many coastal communities face long-standing challenges around deprivation, seasonal economies, housing pressure and youth out-migration [18]. Clean

energy will not solve those issues on its own, but it can become part of a credible regional growth story when investment is linked to jobs, skills and local regeneration. The Dorset Cluster could bring £28 billion investment, roughly 20,000 construction jobs and up to 1,600 operational jobs [19].

That is why Dorset is more than a clean energy location, with the potential to be a delivery partner in the UK's wider energy security and industrial growth agenda.

What Dorset now needs

The ask is straightforward.

- **Dorset needs to be recognised** within national energy strategy and policy as a serious clean energy location. Its contribution should not be treated as peripheral to the UK's offshore wind future.
- **A route to market.** The Cluster needs a clearer pathway through future seabed leasing and the associated policy mechanisms. TCE has already announced plans for Round 6, with a formal tender process expected in the first half of 2027 [20]. Yet Dorset is not yet part of a defined leasing sequence and therefore needs to be positioned for the next available leasing opportunity, whether through a targeted interim round or an accelerated Round 7. Without that pathway, regional momentum, investor confidence and local supply chain opportunity could quietly slip away.
- **Key decision makers should work with the Cluster** to understand the delivery realities on the ground and to identify practical solutions to the hurdles that currently hold back progress.

The Dorset Cluster is about more than offshore wind. It is about how a place, rather than a policy, can convene clean energy from the ground up. How offshore wind, ports, hydrogen and supply chains connect into a regional growth story that links national energy security with local jobs and coastal renewal. That is why Dorset matters.

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