



# Regional governance for a sustainable floating offshore wind (FLOW) industry in the UK's Celtic Sea

Policy Brief

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## Highlights

- The Celtic Sea region has the potential to become a world leader in the global FLOW market.
- The governance of Celtic Sea FLOW is complex due to the involvement of multiple decision-makers located across several tiers of governance (central, devolved, regional, and local).
- Securing economic, social, and environmental value from a 17GW pipeline of FLOW in the Celtic Sea can be best achieved through an enabling policy environment that empowers devolved, regional, and local governance actors to drive FLOW policy direction and execution.
- Strengthening existing regional entities such as the Celtic Sea Cluster can also facilitate buy-in to an integrated, cross-regional approach.
- This policy brief is a result of research conducted by the PERMAGOV project which sets out to improve marine governance across European Seas so that it can better meet the goals and objectives established in the European Green Deal, as well as national marine policy goals.

## Floating offshore wind policy context

The establishment of a new floating offshore wind (FLOW) industry in the UK's Celtic Sea is intended to make a significant contribution to achieving ambitious net-zero targets and the mission to make Britain a clean energy superpower<sup>1</sup>. [The Crown Estate's Celtic Sea Leasing Round 5](#) is expected to deliver 4.5GW of FLOW capacity by the mid-2030s, with spatial potential for a further 12GW already identified<sup>2</sup>. With a strong focus on sustainability, a new FLOW industry in the Celtic Sea aims to deliver cost-competitive clean energy while minimising environmental impacts and supporting local economies. In doing so, it can advance broader policy objectives, including job creation, economic growth, and nature recovery.

Delivering on the transformative economic potential of a 17GW pipeline for Celtic Sea FLOW and securing wider social and environmental benefits for the Celtic Sea region, demands a long-term vision, integrated and strategic approaches within and across governance scales, and effective management of complex stakeholder relationships. In the absence of these conditions, there is a risk that the generational economic opportunities offered by Celtic Sea FLOW will fail to materialise, while climate, nature, and energy security goals may be missed.

## The need for integrated, regional governance to deliver a sustainable FLOW industry



Our research identified that governance roles and responsibilities for Celtic Sea FLOW development and delivery are embedded in a multi-scalar governance arrangement that includes UK central government departments, the Welsh devolved government, English and Welsh regulatory bodies, two Corporate Joint Committees in south Wales, a combined mayoral authority in the southwest of England, and multiple local authorities across England and Wales. Reflecting this complex governance landscape, there are also multiple regional stakeholders who are contributing knowledge, expertise, and resources to advance FLOW ambitions (e.g. Celtic Freeport, Celtic Sea Cluster, Celtic Sea Developers Alliance, Celtic Sea Power, Cornwall FLOW Commission, Great South West, Marine Energy Wales, Pembrokeshire Coastal Forum, and South Wales Industrial Cluster). This diverse array of governance actors highlights the existing regional capacity for FLOW development, and the potential for the Celtic Sea region to become a world leader in the global FLOW market. However, there is also a risk to project delivery from diverging interests and fragmented decision-making amongst governance actors, resource inefficiency caused by overlapping roles and responsibilities, and changing political priorities at UK government level.

The Crown Estate's Leasing Round 5 represents the first phase of commercial FLOW development in the Celtic Sea, providing a unique opportunity to adopt a more integrated, regionally-led approach that can overcome these governance challenges. Such an approach, underpinned by a shared vision for Celtic Sea development, recognises the range of devolved and statutory responsibilities across the region and ensures alignment and consistency across devolved and non-devolved areas. It has the potential to revitalise coastal communities in south Wales and the south-west of England by ensuring that new developments at sea enhance local prosperity, promote social wellbeing, and contribute to marine nature recovery. Lessons learned from the development of fixed-bottom wind in the North Sea suggest that regionally-led governance can deliver multiple benefits, including enhanced local content, stakeholder driven decision-making, and reduced conflicts between marine uses.



## Recommendations

Governance challenge	Recommendation	Target actors
Changing political priorities at UK Government level	Secure long-term political commitment to Celtic Sea FLOW by empowering devolved, regional, and local governments to drive FLOW policy direction and execution	UK Government (e.g. HM Treasury, Wales Office, Ministry of Housing, Communities and Local Government), Welsh Government (e.g. Cabinet Secretary for Housing and Local Government, Cabinet Secretary for Economy, Energy and Planning)
Diverging interests and priorities amongst governance actors	Develop a shared Celtic Sea identity and vision for Celtic Sea FLOW development	UK and Welsh Governments and regulatory bodies, south-west England and south Wales regional and local government authorities, regional Celtic Sea entities (e.g. Celtic Sea Cluster, Marine Energy Wales, Cornwall FLOW Commission)
Multiple regional bodies with overlapping mandates and approaches to FLOW delivery	Develop and review a range of delivery body models based on national/international best practices, with a view to designating a Celtic Sea FLOW Delivery Body	UK and Welsh Governments and regulatory bodies, south-west England and south Wales regional and local government authorities, regional Celtic Sea entities (e.g. Celtic Sea Cluster, Marine Energy Wales, Cornwall FLOW Commission)
Inadequate resourcing of the Celtic Sea Cluster	Allocate human and financial resources to strengthen the Celtic Sea Cluster and secure buy-in from all regional actors	UK and Welsh Governments, regional and local government authorities, The Crown Estate, GB Energy, Offshore Wind Industry Council and its partners

## References

<sup>1</sup> UK Government (2024). [Clean Power 2030: Action Plan: A new era of clean electricity](#).

<sup>2</sup> The Crown Estate (2024). [Future of Offshore Wind. Considerations for development and leasing to 2030 and beyond](#). A Marine Delivery Routemap publication.

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