

Building on water: The rise of floating infrastructure



Floating infrastructure is no longer a futuristic concept – it's fast becoming a cornerstone of global investment strategy. These engineered platforms operate on water, unlocking new space, overcoming land constraints, and delivering resilience against rising sea levels and extreme weather.

With European floating wind capacity forecast to exceed 10–15 GW by 2030, this is not just a growth trend, it marks the emergence of a multi-billion-pound asset class where innovation meets demand.

At Heligan Group, we see this as a catalyst for cross-sector investment, driving

consolidation and strategic acquisitions across the value chain. Businesses that can scale delivery and integrate capabilities will lead this transformation, while specialist providers with unique expertise will become prime acquisition targets and command premium valuations.

A platform for energy, housing, and logistics

Floating infrastructure is reshaping how we generate energy, build cities, and move goods. From deepwater wind farms to solar PV and modular urban platforms, the sector is expanding rapidly, with the UK and Europe at the centre of global development.

Floating wind remains the driver. By 2050, it's expected to deliver one third of the UK's offshore wind capacity, generating 175TWh annually. The 2024 strategy from the joint government–industry Floating Offshore Wind Taskforce outlines a £47 billion opportunity, with potential to create 97,000 jobs and cement the UK's position as a global leader in floating wind technology. UK government auctions, including the Celtic Sea leasing round completed in 2025, have awarded up to 4.5 GW of capacity, marking a major milestone for the offshore wind industry.

Floating solar is also gaining ground, with large-scale installations underway in France, the Seychelles, and Southeast Asia. The Netherlands hosts Europe's largest array at Bomhofspas (22MW), while hybrid platforms integrating solar and wind are beginning to scale. Netherlands' Nymphaea Aurora marks the world's first commercial hybrid energy system, combining both technologies on a single floating platform.

Floating cities like Oceanix Busan and the Maldives Floating City are prototyping climate-resilient housing, while hybrid platforms are emerging for transport, agriculture, fisheries, and data centres, expanding the scope of floating infrastructure far beyond energy.



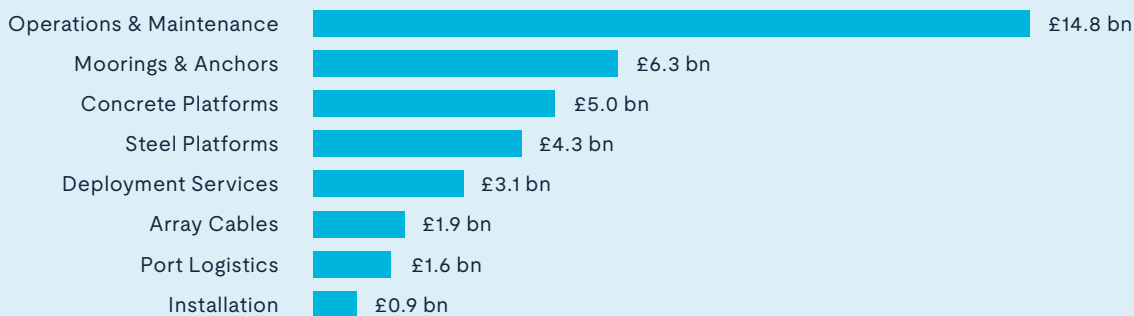


Ports under pressure: The need for industrial-scale assembly

Delivering this future requires industrial-scale infrastructure. Turbines and platforms must be assembled onshore and deployed at sea, demanding reinforced ports, heavy-lift capacity, and marine logistics.

The UK already holds one of the largest floating wind pipelines globally and is ahead of most markets in project development. More than 30,000 people currently work in the UK's bottom-fixed offshore wind sector, and this figure could rise to over 100,000 by 2030. Floating wind is rapidly emerging as a key pillar of the UK's future energy and infrastructure strategy, unlocking investment opportunities across the following areas.

Estimated UK Value by 2050



Despite holding one of the largest global pipelines and being ahead in project development, the UK risks falling behind without the infrastructure to deliver at scale. No UK port is currently equipped to support commercial floating wind deployment, creating a critical bottleneck.

Momentum is building with major investments beginning to unlock delivery capacity:

- £55 million is being invested into the Port of Cromarty Firth to support floating wind manufacturing.
- ABP is committing over £500 million to transform Port Talbot into a major hub for the Celtic Sea.
- Up to 11 ports are earmarked for transformation, with £3.5 billion of investment needed by 2030.

Meanwhile, EU-backed Green Deal Industrial Plan reforms and national support schemes are accelerating port investment across Europe, creating cross-border competition to secure industrial-scale assembly, modular fabrication, and export capacity.



Regulatory drivers: Biodiversity and compliance

From 2026, the UK's Biodiversity Net Gain (BNG) policy will require all major developments, including nationally significant infrastructure, to deliver at least a 10% uplift in biodiversity.

Across Western Europe, regulatory frameworks like the EU Marine Strategy Framework Directive and national consenting regimes are adding pressure, particularly around environmental assessments, marine spatial planning, and habitat compensation. Permitting delays are now a recognised bottleneck, with regulatory scrutiny and stakeholder engagement stretching project timelines.

Meanwhile, insurance, safety, and water usage rights are rising fast on the regulatory agenda, with new standards and reporting obligations, especially for floating platforms.

This shift is expected to accelerate demand for marine environmental consultancies with deep expertise in ecology, habitat assessment, and biodiversity strategy. As compliance becomes core to infrastructure delivery, marine-focused firms are likely to become high-value acquisition targets.

Who will own the water? Investment impact in floating infrastructure

Floating infrastructure is reshaping the services landscape, not just in energy, but across construction, logistics, urban design, and environmental consulting.

This shift is a catalyst for cross-sector integration. Businesses that once operated in distinct verticals are now part of a wider ecosystem. Those with specialist capabilities, scalable operations, or integration potential will be at the forefront of investment and M&A.

Key areas of opportunity include:

- **Port operators and logistics firms**, as infrastructure funds and industrial buyers seek to secure critical access and capacity.
- **Heavy engineering and marine construction businesses**, supporting turbine and platform assembly, prime targets for consolidation.
- **Modular fabrication specialists, marine transport providers, and urban infrastructure designers**, emerging as key players in floating city and hybrid platform development.
- **Environmental consultancies**, increasingly valuable as biodiversity compliance becomes central to infrastructure delivery.

Four structural drivers underpin this investment momentum:

- **Infrastructure bottlenecks**, especially around port capacity, logistics, and fabrication.
- **Fragmented supply chains**, opening the door for buy-and-build strategies across engineering, marine services, and consulting.
- **Rising regulatory complexity**, elevating the strategic value of compliance expertise.
- **Government-backed investment**, helping to de-risk segments and attract capital from infrastructure funds and industrial buyers.

Heligan perspective

At Heligan, we see floating infrastructure as a catalyst for a new wave of strategic investment and consolidation. The sector is moving beyond early-stage innovation into industrial-scale deployment, and that shift will reshape the M&A landscape.

We expect consolidators to emerge from marine engineering, offshore energy, and modular construction, with PE-backed platforms targeting scalable delivery models across wind, solar, and hybrid systems. Environmental consultancies with embedded biodiversity and permitting expertise will be highly sought after, particularly as compliance becomes a prerequisite for project execution.

Businesses that can demonstrate traction in government frameworks, port infrastructure partnerships, and cross-sector integration will command premium valuations. With Europe leading the charge and the UK positioned as a global hub, the next five years will see a race to build capability, secure delivery capacity, and own the water.



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