INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 20 June 2026

Prepared by ExportCentral AI — North East Energy Supply Sector Space

Coverage Period	Audience	Classification
14 – 20 June 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

A regular intelligence briefing for North East Scotland energy supply chain companies presenting the latest news, trends, developments and sales opportunities in the UK offshore low-carbon sector — including offshore wind, hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning and other offshore renewables.

Executive Summary

Last week presented one of the most consequential sets of UK supply-chain signals of the year so far:

- On **14 June**, the UK and Japan signed an **Offshore Wind Compact worth up to £9bn covering 5.9 GW of UK floating wind — Ossian (3.6 GW), Green Volt (560 MW) and Erebus (100 MW)** — anchoring Japanese trading-house capital (Marubeni, TEPCO, Kansai Electric) into ScotWind and Celtic Sea projects in partnership with Great British Energy.
- On **15 June**, **Jan De Nul completed installation of all 54 monopiles at the 1.08 GW Inch Cape ScotWind project** off Angus — the first UK offshore wind farm to use Vestas 15 MW turbines.
- **NSTA awarded three CO_2 storage permits to Eni for the £2bn Liverpool Bay (HyNet) CCS network**, unlocking 2,000 construction jobs and ~£2bn of supply-chain contracts.
- The Crown Estate published the formal terms for the **1.5 GW Morgan re-tender** for July launch.
- In policy, the Treasury **raised the Electricity Generator Levy from 45% to 55% from 1 July 2026**, a material hit to renewable revenue forecasts. DESNZ Minister Michael Shanks signalled price will be the "absolute central factor" in AR8 (opening summer).
- **AR7a results awarded 6,232 MW across solar, onshore wind and tidal stream (20.9 MW tidal at £265/MWh 2024 prices)**.
- **The** UK signed its first **London Protocol CO_2 cross-border MoU with Belgium** on 17 June.
- In decommissioning, **DeepOcean (Aberdeen) won the BP Foinaven subsea decommissioning award** covering 10 risers, 4 umbilicals and associated infrastructure West of Shetland.
- Storage moved fast: **Frontier Power acquired Apatura's 350 MW / 2.8 GWh Ayr & Busby Scottish LDES projects** (Eos zinc Z3 technology, NESO Gate 2).

The week's tempo confirms Q3 2026 is now the structural procurement window for NES Tier 2/3 firms across offshore wind, CCUS, hydrogen and decommissioning.

1. Offshore Wind — Fixed Bottom

Inch Cape Completes Installation of All 54 Monopiles — First UK Site to Use Vestas 15 MW Turbines (15 June 2026)

On **15 June 2026**, Jan De Nul confirmed **successful installation of all 54 monopile foundations at the 1.08 GW Inch Cape ScotWind project** — a 50/50 joint venture between **ESB and Red Rock Renewables sited 15 km off the Angus coast in Scotland**. The campaign was executed by Jan De Nul's heavy-lift vessel **Les Alizés**, transiting from the Port of Leith in Edinburgh carrying five monopiles per voyage, with installation running from December 2025 through to mid-June 2026 — six months of installation in challenging winter weather and difficult North Sea soil conditions. Each monopile was **up to 101 metres long and around 2,300 tonnes — among the largest ever used at any UK offshore wind farm**. Inch Cape will be the **first UK offshore wind farm to use Vestas 15 MW turbines**. The 1,080 MW capacity will power around half of all Scottish homes once operational, abating 2.5 million tonnes of CO_2 per year.

> **NES Sales Opportunity:** Inch Cape now transitions from foundations to **turbine installation, array cabling and offshore substation commissioning through 2026–27 — the largest live offshore wind procurement campaign on the Aberdeen doorstep**. NES Tier 2/3 firms in **inter-array cable termination, cable protection, ROV, geophysical survey, offshore lift inspection, marshalling-port logistics, foundation grouting and scour-protection** should engage ESB and Red Rock Renewables procurement directly. The Leith marshalling port is the strategic logistics node — Aberdeen logistics, transport, and crew transfer firms should target the next 12 months of turbine campaigns. Vestas' first UK 15 MW deployment also opens **UK-content supply opportunities for Vestas' announced Scottish nacelle facility** (€250m+, ~500 direct jobs) — NES suppliers in machined components, gearboxes, electrical, and instrumentation should target Vestas' Scottish supply chain selection process now.

UK-Japan Offshore Wind Compact: £9bn Backs 5.9 GW Floating Pipeline (14 June 2026)

On **14 June 2026** — ahead of the G7 in Evian-les-Bains and during PM Sanae Takaichi's Downing Street visit — the UK and Japan signed the **UK–Japan Offshore Wind Compact**, developed in partnership with **Great British Energy**. The Compact facilitates **up to £9bn ($12.1bn) of Japanese investment in 5.9 GW of UK floating offshore wind** across three projects in which Japanese firms hold stakes: **Ossian (3.6 GW, Marubeni / SSE / Copenhagen Infrastructure Partners, ScotWind 2021)**; **Green Volt (560 MW, Vargronn / Flotation Energy, TEPCO-backed, AR6 CfD, first power 2029)**; and **Erebus (100 MW, TotalEnergies 80% / Simply Blue 20%, Kansai-backed, AR7 CfD)**. The Compact is part of a wider **£18bn UK–Japan economic package** across infrastructure, financial services and advanced technologies. Hitachi Energy separately pledged £18m and 500 jobs in a new Stafford grid-equipment facility. TRIG also confirmed it has sold its 17.5% Beatrice (Scotland) stake to Equitix for £155m on 15 June.

> **NES Sales Opportunity:** The Compact crystallises floating offshore wind as the **single largest Aberdeen and East Coast procurement runway of the next decade**. Ossian alone is a 3.6 GW floating ScotWind development whose tier-1 contracts will be awarded between 2026–28. NES firms in **floating-foundation fabrication, dynamic mooring, dynamic cable engineering, marshalling-port (Aberdeen / Port of Cromarty Firth / Hunterston), inspection, ROV, condition monitoring and consenting** should secure Japanese trading-house briefings before Q4 2026 — Marubeni / TEPCO / Kansai will be testing UK supply chain capability against Japanese / Korean alternatives. Aberdeen consultancies should now offer dedicated Japan-facing market entry support to NES SMEs.

Crown Estate Confirms July Re-Tender for 1.5 GW Morgan Irish Sea Site (15 June 2026)

On **15 June 2026**, the Crown Estate confirmed in detail the **competitive re-tender of the 1.5 GW Morgan offshore wind site** in the Irish Sea, following the relinquishment of the lease by the **EnBW / JERA Nex bp joint venture** in January 2026. Original site was awarded in Round 4 (2021); developer concluded the project was no longer economically viable absent a CfD and citing cost pressures. Crown Estate will **relaunch tender in July 2026** with award to a new developer targeted by **late 2026**. The site retains its **full DCO consent granted August 2025** — making this the fastest-routed major lease back to market this decade.

> **NES Sales Opportunity:** A **DCO-consented 1.5 GW site coming back to market within 6 months of relinquishment** is the most NES-favourable Crown Estate signal of 2026 — the new developer will rely heavily on prior survey, geotech and engineering data and will need to mobilise UK supply chain at pace. NES **marine survey, geotechnical, EBoP, fabrication, port logistics, cable installation, ICP and consenting support firms** should publish Morgan-specific capability statements before the July tender opens. Watch which AR7-veteran developers (Iberdrola/SPR, Vattenfall, Ocean Winds, RWE) bid — their stated supply-chain plans will set the Aberdeen engagement schedule for 2026–27.

Thistle Wind Partners Submits Bowdun 1 GW Offshore Consent Application (14 June 2026)

On **14 June 2026**, **Thistle Wind Partners (TWP) submitted its offshore consent application for the 1 GW Bowdun fixed-bottom offshore wind project** to the Scottish Government Marine Directorate. The onshore application was lodged with Aberdeenshire Council in November 2025, so the project is **now in full determination with both onshore and offshore elements active**. Bowdun will deliver **700+ construction jobs in Scotland over five years and ~60 permanent O&M roles** once operational, supplying enough generation for 1.2 million homes.

> **NES Sales Opportunity:** Bowdun is the **next major Aberdeenshire-anchored ScotWind project to enter determination** — with an O&M base targeted locally. NES firms in **environmental, EIA, planning support, marine ornithology, geotechnical, fisheries liaison and onshore-infrastructure civils** should engage TWP and its principal sub-developers during the public-consultation window. The 60 permanent O&M roles will be procured by 2029–30 — Aberdeen blade-repair, condition-monitoring, vessel operators and inspection firms should begin a 24-month engagement programme now.

2. Floating Offshore Wind

Ossian, Green Volt and Erebus Anchored by UK-Japan Compact — Marubeni, TEPCO and Kansai Capital Cleared (14 June 2026)

The 14 June UK-Japan Offshore Wind Compact (Section 1) is the **largest single inflow of patient capital into UK floating offshore wind in the sector's history**. The three named projects collectively crystallise **5.9 GW of floating offshore wind capacity targeting first power 2029–2032**, with two of three (Ossian, Green Volt) anchored in Scottish waters. Erebus (100 MW, Celtic Sea) is positioned to launch construction 2026–27. The Compact builds on **Marubeni's 2011 first-mover Japanese OW investment in UK Gunfleet Sands**, and confirms the UK as Japan's leading European clean energy partner. UK-content commitments will be benchmarked against Vestas' Scottish nacelle facility (€250m+, 500 jobs).

In parallel, the Welsh Government welcomed UK Government's **£64m commitment to Port Talbot as the Celtic Sea floating wind hub** and confirmed a refreshed Welsh National Energy Strategy roundtable schedule. Wales's offshore wind sector projects 3,000 long-term jobs and ~£5bn of Welsh business value over the next decade. New Welsh Energy Minister Adam Price spoke at Global Offshore Wind 2026 on 17 June.

NES Sales Opportunity: Aberdeen / Cromarty Firth are competing directly with Port Talbot for floating wind marshalling, fabrication and O&M roles. NES **floating foundation fabrication, dynamic cable, mooring engineering, marshalling-port operators, integrated logistics, and crew-transfer firms** should run two parallel engagement tracks: (1) Marubeni / SSE / CIP on Ossian tier-1 procurement; (2) Vargronn / Flotation Energy / TEPCO on Green Volt EPCI and O&M procurement — first power 2029 means tier-1 awards land in 2026–27. Aberdeen consultancies with Japan-market knowledge should monetise the Compact as an SME-internationalisation play.

3. Hydrogen

ITM Power–Protium Strategic Partnership Frames Cromarty 15 MW December 2026 FID (3 June 2026; reissued in HEA bulletin 15 June)

The **ITM Power–Protium strategic partnership** — first announced 3 June 2026 and re-publicised across Global Offshore Wind / HEA channels through 15 June — confirms a flexible framework for developing, investing in and operating UK industrial-scale green hydrogen plants. Immediate joint focus is the **15 MW Cromarty Hydrogen Project** in the Scottish Highlands (HAR1-supported, **~7 tonnes/day at peak output**, ~30 highly skilled jobs in Phase 1). Protium leads power procurement, permitting, downstream infrastructure and distribution; ITM supplies electrolysers either via its Hydropulse subsidiary or by direct acquisition. **FID is currently targeted for December 2026**. The framework spans Protium's wider portfolio including South Tees and HAR2 / HAR3 shortlisted projects — implying recurring electrolyser orders for the Sheffield Chronos line (Section 9 of the 13 June briefing).

H-Power Signs UK's First Commercial Ammonia-Cracked Green Hydrogen Sale to Protium (HEA bulletin 15 June 2026)

In a separate but linked development, **H-Power plc (AIM: HPOW) confirmed via HEA on 15 June 2026 the UK's first commercial sale of bulk hydrogen produced from cracked ammonia** — a **5,000 kg supply agreement with Protium** from H-Power's Dunsfold pilot plant. The Environment Agency has issued a permit revision allowing third-party sales until 31 August 2026 — a regulatory precedent for emerging UK ammonia-to-H_2 supply pathways. Hydrogen is certified ISO 14687 Grade D at 99.97% purity, suitable for PEM fuel cells. H-Power's HY5 decentralised portable cracker (500 kg/day) is targeted for launch end-2026 and would be the lowest cost subsidy-free bulk fuel-cell hydrogen in the UK.

NES Sales Opportunity: The Cromarty FID window (December) and the H-Power/Protium ammonia-cracking precedent together open **a 24-month NES supply-chain procurement runway** across electrolyser BoP, ammonia handling, hydrogen safety case, compression, gas treatment and HAZID/HAZOP engineering. NES firms in **hydrogen safety, distillery-grade pipework, electrical EPC, instrumentation and high-pressure storage** should now engage Protium (Cromarty), ITM (Sheffield Chronos) and H-Power (Dunsfold) in parallel. The HY5 portable cracker is a route to distributed hydrogen for Aberdeenshire distillery and logistics customers — worth Aberdeen consultancies scoping bundled commercial offerings.

4. Carbon Capture, Utilisation & Storage (CCUS)

NSTA Awards Eni Three CO_2 Storage Permits for £2bn HyNet / Liverpool Bay CCS (15 June 2026)

On **15 June 2026**, the **North Sea Transition Authority awarded three carbon storage permits to Liverpool Bay CCS Limited (an Eni subsidiary) for the HyNet industrial cluster** — the second permit award by the regulator within five months following Northern Endurance Partnership. Phase 1 will **store 109 million tonnes of CO_2 over 25 years in the East Irish Sea, 20 miles off the coast of Liverpool**, injecting **4.5 million tonnes per**

year from mid-2028. The award unlocks **~£2 billion of supply-chain contracts and 2,000 construction jobs**. Infrastructure includes 90+ miles of offshore and onshore pipelines, a new platform at the Douglas field, and CO_2 gathering from Point of Ayr (Flintshire, Wales). The storage system uses the Hamilton, Hamilton North and Lennox depleted reservoirs.

UK–Belgium London Protocol MoU Opens First Cross-Border CO_2 Storage Route (17 June 2026)

On **17 June 2026**, the UK and Belgium signed a **Memorandum of Understanding under the London Protocol enabling cross-border transport and permanent storage of captured CO_2** — the **first London Protocol arrangement signed by the UK with another country**. The agreement establishes the regulatory framework allowing Belgian hard-to-abate industrial emitters to access the UK's growing North Sea storage network. UK Energy Minister Lord Whitehead described the MoU as a step towards an international CCUS market.

> **NES Sales Opportunity:** Two major North Sea CCS catalysts in one week: Liverpool Bay funding unlock (£2bn) and the first UK–Belgium cross-border storage agreement together open **a structural North Sea CO_2 import market that benefits Acorn / Peterhead positioning**. NES Tier 2/3 firms in **subsea pipeline EPC, well-integrity, CO_2 monitoring (MMV), corrosion, FEED, process engineering, port-side import terminals and CO_2 ship-handling** should respond to the Northern Endurance Partnership upcoming tenders (28 June 2026 estimated tender date for CDM services and rockdumping subsea works, both <£25m), and refresh capability statements with Storegga, Shell, Harbour, Eni, BP and Equinor. The Belgium MoU implies a future continental CO_2 inbound shipping market — Aberdeen marine services and import infrastructure consultants should engage Belgian / Northern European CCS hubs (Antwerp@C, Rotterdam Porthos).

5. Marine & Tidal

AR7a Awards 20.9 MW Tidal Stream at £265/MWh Across Four Projects (16 June 2026)

On **16 June 2026**, DESNZ confirmed final results for **Contracts for Difference Allocation Round 7a (AR7a)**. Total awards reached **6,232 MW across solar PV (4,905 MW, 157 projects), onshore wind (1,306 MW, 28 projects) and tidal stream (20.9 MW, four projects, Pot 2)**. The tidal stream clearing strike price was **£190.19/MWh in 2012 prices (£265/MWh in 2024 prices) — a 28.6% reduction vs the administrative strike price**, confirming continued tidal cost reduction. Delivery years are 2028/29 and 2029/30. Regional shares: England 68.6%, Scotland 22.9%, Wales 8.5%. Separately, **Scottish Renewables called for the Scottish Government to commit to a dedicated tidal-stream policy statement in the upcoming Programme for Government**, citing investor-confidence and barriers to commercial expansion.

> **NES Sales Opportunity:** Continued AR7a tidal cost reduction and a 20.9 MW award stream maintain the **UK tidal-stream procurement cadence ahead of AR8**. NES Tier 2/3 firms in **marine survey, foundation design, marine cable, environmental monitoring, blade and turbine inspection, and project-management for tidal arrays** should engage AR7a winners and align with Scottish Renewables' Programme-for-Government engagement window. Aberdeen subsea engineering firms with O&G transferable skills are well-positioned for the tier-1 tidal-stream EPCI procurement programmes that follow CfD award — worth scoping HydroWing, Orbital Marine, Tidal Technologies and Nova Innovation capability briefings now.

6. Geothermal

British Geological Survey Updates UK Geothermal Catalogue (16 June 2026)

On **16 June 2026**, the **British Geological Survey (BGS) published a refreshed update to its UK Geothermal Energy Catalogue** — a foundational dataset informing UK deep-geothermal investment and licensing decisions. The catalogue update lands alongside the active **Northern Ireland geothermal licensing consultation (open until 7 August 2026)** and the CeraPhi Energy Kirby Misperton heat-network progression (17 June). United Downs (Cornwall, Geothermal Engineering Ltd) continues to deliver 24/7 baseload geothermal electricity to Octopus Energy with co-product lithium carbonate.

> **NES Sales Opportunity:** The BGS catalogue refresh sharpens the **UK deep-geothermal addressable market** and underpins the NI licensing framework currently in consultation. NES **geoscience, drilling, well-services, completions, well-integrity and reservoir engineering firms** should: (1) lodge consultation responses to NI DfE before 7 August 2026; (2) engage CeraPhi (Yorkshire heat-network), GEL (Cornwall) and emerging Scottish geothermal developers on capability transfer from UKCS O&G; and (3) profile transferable Aberdeen consultancies into the BGS catalogue and into Programme for Government engagement for any Scottish geothermal licensing framework.

7. Decommissioning

DeepOcean (Aberdeen) Awarded BP Foinaven Subsea Decommissioning Contract (18 June 2026)

On **18 June 2026**, **DeepOcean was awarded a contract by BP for subsea decommissioning at the Foinaven field, West of Shetland**. Scope covers removal of **10 flexible process risers, 3 dynamic subsea umbilicals, 1 static umbilical, buoyancy modules, riser protection systems, clamps and associated equipment** from the former FPSO location. The field lies **approximately 190 km west of the Shetland Islands in water depths of 330–530 m**. Project management is run from **DeepOcean's Aberdeen operations centre**. The contract uses an **innovative sale-and-purchase agreement model** (also previously applied at Don and Miller fields) which transfers commercial flexibility and asset value to the decommissioning contractor. Foinaven was discovered in 1992, started production in 1997, and ultimately produced ~440 million bbl — roughly double the original development plan.

In parallel, **Petrojarl Rosebank FPSO arrived on site west of Shetland (week of 18 June)** marking commencement of one of the UK's largest undeveloped oil and gas fields — evidence that UKCS continues to generate both new development and decommissioning revenue concurrently. The Gov.UK Deep Drilling Screening Directions list (last updated 15 June) records new drilling approvals for Captain, Cygnus, Claymore and Clair Ridge during the week.

> **NES Sales Opportunity:** The DeepOcean Foinaven award is **an exemplar Aberdeen-anchored decommissioning revenue opportunity**. NES Tier 2/3 subcontractors to DeepOcean and the wider UKCS decommissioning ecosystem (Subsea7, Saipem, TechnipFMC) in **cutting, lifting, recycling, hydraulics, ROV, subsea engineering, transport / disposal logistics, materials recovery** should engage DeepOcean's Aberdeen team directly. The sale-and-purchase commercial model is also evidence of an emerging **asset-transfer decommissioning market** — worth Aberdeen consultancies scoping for asset-base growth opportunities. The Rosebank concurrent FPSO arrival underscores the long tail of mid- and late-life UKCS opportunity beyond decommissioning.

8. Hydropower & Pumped Storage

Frontier Power Acquires 350 MW / 2.8 GWh Ayr & Busby Scottish LDES Pipeline from Apatura (16 June 2026)

On **16 June 2026**, **Frontier Power Energy Holdings acquired the rights to Apatura Energy's Ayr and Busby long-duration energy storage projects**, combining **350 MW / 2.8 GWh capacity** (Ayr: 200 MW / 1.6 GWh; Busby: 150 MW / 1.2 GWh) using **Eos Energy Enterprises' Z3 zinc-based long-duration battery technology**. Both projects have received **Gate 2 notifications under NESO's Grid Connections Reform process** and are positioning into **Ofgem's LDES Cap and Floor regime**. Eurelectric / AFRY also published a new LDES market study (19 June) flagging UK as a leading European LDES market.

> **NES Sales Opportunity:** The Ayr / Busby acquisition crystallises a new wave of **non-pumped-hydro Scottish LDES projects entering FID-prep ahead of Ofgem's minded-to decisions**. NES **civil construction, electrical EPC, SCADA, grid connection, environmental monitoring and zinc-battery integration firms** should engage Frontier Power directly. Aberdeen consultancies advising on Coire Glas, Earba and Loch na Cathrach pumped-storage should bundle their LDES offerings to include zinc battery alternatives — the Ofgem minded-to decisions will run both LDES asset classes side-by-side. Build supplier MoUs with Eos Energy Enterprises NOW to position into the structural Scottish LDES pipeline build-out.

9. Policy & Regulatory Developments

Electricity Generator Levy Raised from 45% to 55% from 1 July 2026 (17 June 2026 Notice)

On **17 June 2026**, HM Treasury published the amended rate of the **Electricity Generator Levy (EGL)**, increasing the charge rate **from 45% to 55% on receipts attributable to electricity generated from 1 July 2026**. The increase applies through the existing EGL framework to renewables, nuclear and other low-carbon generators above the benchmark price. DESNZ Minister Michael Shanks separately signalled at Global Offshore Wind 2026 that **price will be the "absolute central factor" in AR8 — far more than in previous rounds** — against a backdrop of higher electricity bills and political contestation of clean power targets. Ofgem also confirmed a 13% July price cap rise.

AR7a Confirmed; AR8 Opening Summer 2026 with Price-Central Focus (15–17 June 2026)

Beyond AR7a tidal awards (Section 5), the headline policy signal of the week is **the elevation of strike price as the dominant AR8 selection criterion**. TGS / 4C's Q2 2026 report (15 June) noted **AR7 first projects pushing to FID** and AR8 awarding a healthy stream of new contracts despite cost pressure. UK was singled out as the most agile offshore wind market globally (vs Norwegian and German auction delays).

DESNZ Plug-in Solar and Ofgem Demand Connections Reform (16 June 2026)

Two further policy steps landed mid-week: (1) DESNZ opened a **two-week consultation on plug-in solar (closes 30 June 2026)** — proposing PSSR amendments and an Interim Product Specification (800 VA max, 3.5 A max, single phase, no batteries, one device per household); (2) Ofgem published its **demand connections reform call-for-input response (16 June)** — covering self-build / self-ownership of HV assets and demand-side flexibility for large connections (incl. data centres). AI Energy Council minutes (April 2026, published 19 June) confirmed **125 GW of demand currently in the GB connections queue (vs 45 GW peak)** — implying continued grid-prioritisation reform throughout 2026.

> **NES Sales Opportunity:** The EGL increase from 45% to 55% **cuts renewables net cashflow projections by ~10pp for the second half of 2026** and reshapes the financial model behind AR7 / AR8 procurement. NES Tier 2/3 firms quoting tier-1 EPCI contractors should expect: (1) tighter unit pricing pass-through; (2) higher commercial intensity in tender clarification; (3) more aggressive UK-content negotiation. Aberdeen consultancies advising developers on tax / regulatory exposure should now build EGL-55 scenario models. The demand connections reform also signals **imminent grid-queue restructuring through Q4 2026 — NES civils, EBoP and grid-connection firms should engage SSEN-T and NGED early on impact**.

10. Key Upcoming Events for NES Companies

Event	Date	Location	Relevance
AR8 Allocation Round Opens (DESNZ)	Summer 2026 (imminent)	Online (DESNZ)	Price-central CfD round — offshore wind / FLOW / ODOW / hydrogen positioning
Morgan Offshore Wind 1.5 GW Tender Launch	July 2026	Online (Crown Estate)	DCO-cleared site re-tender — first NES capability-statement window
Northern Endurance Partnership CDM / Rockdumping Tenders	30 June 2026	Online (NSTA Energy Pathfinder)	<£25m subsea CCS sub-contracts for NES decommissioning firms
Crown Estate Supply Chain Accelerator R3 Deadline	3 July 2026	Online	£15m fund — 50% match — final application date
Ofgem ED2 LRE Volume Drivers Consultation	9 July 2026	Online (Ofgem)	DNO/distribution-network supply chain pricing
Spiorad na Mara Onshore Planning Consultation	12 July 2026	Comhairle nan Eilean Siar	Western Isles 900 MW ScotWind — EIA / engagement window
DESNZ Plug-in Solar Consultation Closes	30 June 2026	Online (Citizen Space)	PSSR / Product Specification — solar industry supply chain
Cromarty Hydrogen Project FID Target (Protium / ITM)	December 2026	Scottish Highlands	15 MW electrolyser FID — first major NES H_2 supply-chain mobilisation
NI Geothermal Licensing Consultation Closes	7 August 2026	Online (DfE NI)	Aberdeen subsurface / geomechanics submissions
Floating Offshore Wind 2026 (RenewableUK)	7–8 October 2026	P&J Live, Aberdeen	ScotWind FLOW procurement positioning — Ossian / Green Volt

11. Grant Funding & Support Mechanisms Active This Week

Fund / Mechanism	Value	Deadline	Eligible NES Companies
Crown Estate Supply Chain Accelerator Round 3	£15m — 50% match, £250k–£2m per project	3 July 2026	UK fixed / floating offshore wind supply chain, ports
GBE Supply Chain Fund	Up to £300m capital (part of £1bn clean energy commitment)	10 December 2026	Manufacturers of OW components, cables, foundations, nacelles
UK-Japan Offshore Wind Compact (GBE)	Up to £9bn investment facilitation	Rolling — project-by-project	Tier-1 / Tier-2 suppliers to Ossian, Green Volt, Erebus
NSTA Northern Endurance Partnership Tenders	<£25m per package	30 June 2026 (estimated)	CDM services, rockdumping, subsea offshore CCS construction

Fund / Mechanism	Value	Deadline	Eligible NES Companies
Offshore Wind Growth Partnership Industrial Growth Fund	£300k – £25m per project	Rolling	Manufacturing expansion in offshore wind supply chain
UK Hydrogen Allocation Round 2 (HAR2)	CfD-style revenue support	Decisions ongoing through 2026	Electrolyser integrators, EPC contractors, BoP suppliers
LDES Cap and Floor (Ofgem)	Revenue support framework	Minded-to decisions June 2026 (imminent)	Pumped-storage and zinc / battery LDES developers / supply chain
DESNZ ITM Power Chronos Package	£86.5m UK Gov commitment	CMA subsidy-control decision — June 2026	Sheffield-supply-chain mechanical, electrical, automation, instrumentation

12. Sales Opportunity Summary for NES Supply Chain Companies

Sector	Opportunity	Timing	Priority
Fixed Wind	Inch Cape 1.08 GW — 54 monopiles installed, turbines/array cables 2026–27; first Vestas 15 MW UK deployment	Now	★★★★★
Floating Wind	UK-Japan Compact £9bn / 5.9 GW — Ossian, Green Volt, Erebus tier-1 procurement opens 2026–27	Q3 2026 onwards	★★★★★
Fixed Wind	Morgan 1.5 GW Irish Sea re-tender — July 2026 launch, award late 2026	Urgent	★★★★★
CCUS	HyNet / Liverpool Bay £2bn supply-chain unlock — 4.5 Mtpa CO_2 from 2028	Immediate	★★★★★
CCUS	UK-Belgium London Protocol MoU — cross-border CO_2 import market opens	2026–28	★★★★
Decommissioning	DeepOcean BP Foinaven (Aberdeen) — sub-tier subsea decommissioning revenue	Now	★★★★★
Hydrogen	Cromarty 15 MW FID December 2026 — ITM/Protium partnership BoP procurement	Now–2026	★★★★★
Hydropower / LDES	Frontier Ayr+Busby 2.8 GWh zinc LDES + Ofgem cap-and-floor minded-to decisions	June 2026	★★★★★
Fixed Wind	Bowdun 1 GW offshore consent submitted — Aberdeenshire ScotWind project	Now–2030	★★★★
Marine / Tidal	AR7a 20.9 MW tidal at £265/MWh — Morlais and Pentland tier-1 procurement	2026–28	★★★★
Policy	EGL 45%→55% from 1 July 2026 — advisory / tax / pass-through engagement	Immediate	★★★★
Geothermal	BGS catalogue update + NI consultation — subsurface/geomechanics responses	Now–2026	★★★

This briefing covers the period 14 – 20 June 2026. All opportunity ratings reflect proximity, scale, and fit with typical NES Tier 2/3 company capabilities. This briefing is prepared by ExportCentral AI for use by North East Scotland energy supply sector participants.

Sources Used

[1] UK, Japan agree on offshore wind investment pact worth up to GBP9 billion — S&P Global Commodity Insights (15 June 2026)

[2] UK and Japan launch floating offshore wind partnership targeting 5.9 GW — Enerdata (18 June 2026)

[3] UK and Japan target 5.9 GW of floating offshore wind development — Windtech International (16 June 2026)

[4] All monopiles installed at Scotland's Inch Cape Offshore Wind Farm — Jan De Nul / DredgeWire (15 June 2026)

[5] Crown Estate to relaunch tender for 1.5 GW Morgan offshore wind site after lease return — Windtech International (15 June 2026)

[6] Thistle Wind Partners submits offshore plans for Bowdun farm — Wind Systems Magazine (14 June 2026)

[7] Cadeler Installs Final Turbine at RWE's 1.4 GW Sofia Offshore Wind Farm — Intelatus (18 June 2026)

[8] New Minister endorses potential of offshore wind for Wales — Welsh Government (17 June 2026)

[9] Strategic Partnership with Protium — ITM Power / Investegate (3 June 2026)

[10] Sale of 5,000 kg of hydrogen from cracked ammonia — H-Power plc / Investegate (17 June 2026)

[11] HEA's Hydrogen in the News 15th June 2026 — Hydrogen Energy Association LinkedIn (15 June 2026)

[12] £2bn HyNet carbon storage project will provide massive jobs and net zero boost — NSTA (15 June 2026)

[13] Belgium and UK Sign Agreement to Enable Cross-Border CO_2 Storage — Carbon Herald (17 June 2026)

[14] Tender for project Northern Endurance Partnership — NSTA Energy Pathfinder (15 June 2026)

[15] UK awards 6.2 GW of renewable energy capacity in Latest CfD Auction (AR7a) — Windtech International (16 June 2026)

[16] Scottish Renewables seeks tidal backing — Scottish Renewables / Renewable Energy Newswire (19 June 2026)

[17] UK geothermal catalogue receives update — British Geological Survey (16 June 2026)

[18] CeraPhi Energy progresses Kirby Misperton geothermal Heat Network project — Energy Global (17 June 2026)

[19] DeepOcean wins bp subsea decommissioning contract at Foinaven field — World Oil (18 June 2026)

[20] Deep Drilling Screening Directions 2026 — GOV.UK (15 June 2026 update)

[21] Frontier acquires 2.8 GWh UK energy storage projects — REGlobal (16 June 2026)

[22] Frontier Power acquires zinc LDES projects in Scotland from Apatura — Solar Power Portal (17 June 2026)

[23] Amended rate of the Electricity Generator Levy — 2026 to 2027 — GOV.UK (17 June 2026)

[24] Energy's "new era" | UK offshore wind auction (AR8 price-central focus) — Carbon Brief Daily (17 June 2026)

[25] Connect update: demand connections reform — Ofgem (16 June 2026)

[26] DESNZ opens consultations for plug-in solar deployment — Solar Power Portal (17 June 2026)

[27] Energy security tops political agendas (TGS | 4C Q2 2026) — GlobeNewswire (15 June 2026)

[28] Birkhill Wood substation approved for Dogger Bank wind — Electrical Review (18 June 2026)