

# INTELLIGENCE BRIEFING

## UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 6 June 2026

Prepared by ExportCentral AI — North East Energy Supply Sector Space

| Coverage Period      | Audience                         | Classification             |
|----------------------|----------------------------------|----------------------------|
| 31 May – 6 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

A week defined by **CCUS and hydrogen policy momentum, AR8 framework publication, and BESS / LDES consolidation**. DESNZ published the **AR8 Allocation Framework** on **1 June** setting the rules and eligibility for the upcoming July auction. OEUK’s **first North Sea CCS & Hydrogen Summit** (Edinburgh, 1–2 June) was opened by new Scottish Energy Minister Stephen Gethins and launched two anchor reports — DNV’s “An Integrated and Resilient North Sea” and Xodus’ “Enabling Infrastructure for cross-border CO<sub>2</sub> transport” — framing the UK Continental Shelf’s **~70 billion tonne CO<sub>2</sub> storage potential** as a strategic European asset and quantifying cross-border CO<sub>2</sub> flows of **18 MTPA in 2030 rising to 36 MTPA by 2050**.

In hydrogen, **Protium and ITM Power formalised a UK-wide strategic partnership on 3 June** with immediate focus on the **15 MW Cromarty Hydrogen Project in the Scottish Highlands** (HAR1-funded, ~7 t/day at peak), targeting FID in **December 2026**. In policy, the **Offshore Wind Fair Work Charter** launched on **5 June** with 37 supply chain companies (including the **Port of Aberdeen, Hitachi Energy UK, Severfield, Smulders Projects UK and Cadeler UK**) and five trade unions signing on. In LDES, Ofgem confirmed it will **publish minded-to decisions on cap-and-floor LDES projects in June 2026** alongside a consultation — the largest catalyst yet for pumped-storage and large-scale BESS investment, with Fidra Energy’s acquisition of the 1 GW Enderby BESS project signalling intensifying pre-decision positioning.

## 1. Offshore Wind — Fixed Bottom

### AR8 Allocation Framework Published — Auction Rules Confirmed (1 June 2026)

On **1 June 2026**, DESNZ published the **Contracts for Difference (CfD) Allocation Round 8 Allocation Framework**, setting out the rules for Allocation Round 8 and the eligibility requirements applicants must satisfy. The Framework applies to England, Scotland and Wales and confirms the AR8 auction structure ahead of its scheduled July 2026 opening. The publication confirms the procedural baseline against which AR8-bidding offshore wind, hydrogen and CfD-eligible developers are now drafting their final bid strategies — including the three-year delivery window for solar and onshore wind confirmed in May, and the Clean Industry Bonus contract amendments locked in on 21 May.

**NES Sales Opportunity:** With the AR8 Framework published, **developer sub-contract decisions accelerate in the next 30–45 days** as bidding teams finalise UK-content, CIB and delivery commitments. **NES grid-connection, EBoP, civils, geotechnical, marine survey, ICP, fabrication and logistics firms** should have AR8-targeted capability statements in front of every named AR8 sponsor by end of June. Aberdeen consultancies tracking AR8 tier-1 procurement should also flag CIB-aligned sub-contract framework opportunities into existing customer relationships at SSE Renewables, RWE, EDF, Statkraft and ScottishPower.

## Offshore Wind Fair Work Charter Signed by 37 Supply Chain Companies and Five Unions (5 June 2026)

On **5 June 2026**, the UK Government formally launched the **Offshore Wind Fair Work Charter** with an initial cohort of **37 supply chain enterprises** and five trade unions — GMB, Prospect, Unison, RMT and Unite — alongside the TUC. Named NES-relevant signatories include the **Port of Aberdeen, Hitachi Energy UK, Severfield Nuclear and Infrastructure, Smulders Projects UK, Cadeler UK, JDR Cable Systems, Siemens Energy, Siemens Gamesa, Navantia UK, Bilfinger UK, Boskalis Subsea, Van Oord Offshore Wind UK, SeAH Wind and Holcim UK**. Energy Secretary Ed Miliband framed the Charter as a baseline standard for union access, health and safety, apprenticeships and pay and conditions. The Charter is positioned as a precursor to industry-wide fair-work commitments that may be embedded in AR8 sub-contract framework qualification.

**NES Sales Opportunity:** The Charter's signatory list is now a **de facto Tier-1/Tier-2 buyer list for AR7 / AR8 procurement frameworks**. NES firms supplying any of the 37 signatories — particularly the Aberdeen-anchored Port of Aberdeen, Hitachi Energy UK, Smulders, Cadeler UK and Siemens Energy / Siemens Gamesa — should engage their procurement teams this month with Fair Work-aligned capability statements. Aberdeen Tier 3 firms should also assess whether they meet Charter standards themselves — fair-work alignment will likely become a default supplier-qualification criterion across UK offshore wind in 2026–27.

## 2. Floating Offshore Wind

### Sonardyne and AMOG Sign MOU on Floating Wind Mooring Monitoring (4 June 2026)

On **4 June 2026**, UK-headquartered marine technology firm **Sonardyne** signed a memorandum of understanding with engineering company **AMOG** to develop a subsea asset monitoring service for floating offshore wind projects. The agreement pairs **Sonardyne's Observer subsea asset integrity monitoring system** (with motion-monitoring, third-party sensor integration and onboard analytics) with AMOG's mooring engineering capabilities. The partners are already developing a **near real-time mooring monitoring system for a European floating offshore wind project**, positioning the joint service for the rapid scale-up of ScotWind floating projects through the late 2020s. The MOU also reflects continued UK supply chain leadership in floating-wind digital monitoring — a technology area where Aberdeen-anchored marine technology firms have a competitive advantage.

**NES Sales Opportunity:** Mooring integrity and dynamic asset monitoring will be a **mandatory specification on every ScotWind floating project** as fleet operation extends from pilot to commercial scale. **NES marine survey, ROV inspection, subsea instrumentation, mooring engineering, marine data analytics and dynamic-cable integrity firms** should engage Sonardyne and AMOG's technical teams to position as installation, integration and ongoing-monitoring sub-contractors. Aberdeen-based marine-technology firms with floating-wind references should also engage Muir Mhòr (Fred. Olsen Seawind) and Buchan Offshore Wind directly on monitoring sub-contracting opportunities.

## 3. Hydrogen

### Protium and ITM Power Formalise Strategic Partnership — Cromarty Hydrogen Targets December 2026 FID (3 June 2026)

On 3 June 2026, Protium Green Solutions and ITM Power formalised a strategic partnership to develop, invest in, and operate industrial-scale green hydrogen production plants across the UK. The immediate focus is the **flagship Cromarty Hydrogen Project in the Scottish Highlands** — acquired by Protium in May 2026 and HAR1-funded — with a **15 MW electrolyser capacity producing circa 7 tonnes of green hydrogen per day at peak output**. Final Investment Decision is currently targeted for **December 2026**. The companies are exploring multiple deployment models including via Protium’s Hydropulse delivery platform and the potential direct acquisition by Protium of ITM’s market-leading electrolysis assets — a major UK-stack consolidation signal. The agreement extends beyond Cromarty into a broader pipeline of Protium-sponsored projects.

**NES Sales Opportunity:** Cromarty is the **most advanced Scottish green-hydrogen project** and the UK’s clearest near-term FID candidate after Barrow. The Highland location creates a high-priority opportunity for **NES electrical / mechanical packagers, pipework, compression, hydrogen safety case, HAZID, water-treatment, civils and marine logistics firms**. With FID targeted for December 2026, **sub-contract framework decisions will be made by Protium and ITM Power’s execution teams through Q3 / Q4 2026** — the engagement window is now. Aberdeen consultancies should also track Protium’s wider portfolio (70 MW Scottish portfolio) as follow-on opportunities.

## 4. Carbon Capture, Utilisation & Storage (CCUS)

### OEUK Hosts First UK North Sea CCS & Hydrogen Summit — DNV and Xodus Reports Launched (1–2 June 2026)

OEUK hosted its **first North Sea CCS & Hydrogen Summit at the Sheraton Grand Hotel, Edinburgh, on 1–2 June 2026**, opened by Scotland’s new Minister for Europe, External Affairs and Energy, **Stephen Gethins**. The summit launched two anchor reports. DNV’s **“An Integrated and Resilient North Sea”** examines CO<sub>2</sub> transport and storage and hydrogen transport across the UK, Norway, the Netherlands, Germany, Belgium and France, arguing that planning infrastructure as one integrated North Sea system is essential to deliver affordability, resilience, interoperability and long-term value. Key data: the **UK Continental Shelf alone has geological potential to store ~70 billion tonnes of CO<sub>2</sub>**, but by the mid-to-late 2040s, **capture volumes could match or exceed planned injection capacity unless additional storage sites are licensed and developed**. Payback periods on CCS and hydrogen transport / storage investments are projected at **20–30 years**.

The Xodus study — **“Enabling Infrastructure for Cross-border CO<sub>2</sub> Transport”** — anticipates the North Sea region storing the most significant share of cross-border CO<sub>2</sub> flows, projected at **18 MTPA in 2030 rising to 36 MTPA by 2050**. Major projects updated at the summit included the **Morecambe Net Zero and Peak Cluster developments** — collectively decarbonising ~40% of UK cement-sector emissions, safeguarding more than 13,000 jobs and including development of the **UK’s largest onshore CO<sub>2</sub> pipeline**. OEUK also released **Issue 2 of its Well Decommissioning and Legacy Well Assessment for CO<sub>2</sub> Storage guidance** — supporting well operators and CO<sub>2</sub> storage operators in assessing the integrity of legacy decommissioned wells during reservoir-to-storage conversion.

**NES Sales Opportunity:** The summit re-positions UK CCUS as a **European-scale infrastructure opportunity** with 18–36 MTPA cross-border CO<sub>2</sub> flows. Aberdeen-based **subsea pipeline integrity, CO<sub>2</sub> dense-phase metering, well-integrity, legacy well assessment, ROV inspection, port infrastructure,**

**CO<sub>2</sub> transport vessel and CO<sub>2</sub> risk-assessment specialists** should engage Morecambe Net Zero, Peak Cluster and the Eni Liverpool Bay / Bacton CCS teams directly, with case studies referencing OEUK's Issue 2 Well Decommissioning guidance. The UK's CCS legacy well conversion opportunity (decommissioned oil and gas wells repurposed as CO<sub>2</sub> storage) is an immediate addressable market for Aberdeen well-integrity consultancies.

## 5. Marine & Tidal Energy

### Status Update — Pre-AR8 Tidal Ringfence Anticipation; Caudal Energy Seed Closes (Carry-over Context)

No new major UK tidal-stream contract awards landed in the 31 May – 6 June window. With the AR8 Allocation Framework now published, sector attention is concentrated on the **size of the AR8 ringfenced tidal-stream pot** — widely expected to be confirmed in the next 30 days. The 29 May £4.3m seed close at Caudal Energy (Oxford spinout, oscillating-fin tidal architecture) continues to be the principal UK tidal supply-chain catalyst this month. Marine Energy Wales 2026 remains the next major sector touchpoint.

**NES Sales Opportunity:** NES **subsea engineering, mooring, marine-survey and ROV firms** should use the four weeks ahead of AR8 opening to intensify engagement with MeyGen Phase 2 procurement, Orbital Marine Power and Caudal Energy. Aberdeen marine-technology firms with floating-wind references can position the same monitoring and integration capabilities for tidal-stream pilot deployment.

## 6. Geothermal

### Status Update — Rystad / ThinkGeoEnergy Joint Market Brief Published Ahead of World Geothermal Congress (3 June 2026)

On **3 June 2026**, Rystad Energy and ThinkGeoEnergy jointly published a market brief on the **global geothermal sector ahead of the World Geothermal Congress 2026** (Calgary, 8–11 June). The brief highlights **next-generation geothermal (including EGS — Enhanced Geothermal Systems)** as the principal vector for accelerated UK and global geothermal deployment. The brief lands ahead of the EAGE Annual Conference & Exhibition (8–11 June, Aberdeen) — a major adjacency-relevant event for NES drilling, downhole tooling and subsurface consultancies. UK procurement momentum continues at Geothermal Engineering Ltd Cornwall, the British Geological Survey UK Geothermal Platform, and Scottish mine-water deep-heat networks.

**NES Sales Opportunity:** EGS positioning creates a clear technology-transfer opportunity for Aberdeen-based **drilling, reservoir engineering, hydraulic stimulation, downhole monitoring and subsurface simulation firms**. Capability statements should explicitly position Aberdeen oil-and-gas subsurface expertise as directly applicable to EGS. NES firms attending EAGE Aberdeen (8–11 June) should use the event for targeted UK geothermal sponsor outreach — the conference programme overlaps directly with the EGS thematic.

## 7. Decommissioning

### SPE Aberdeen Well Decommissioning 2026 Convenes — Sector Procurement Visibility Peak (3–4 June 2026)

The **SPE Aberdeen Well Decommissioning 2026 conference convened at P&J Live, Aberdeen, on 3–4 June 2026**. The event — the principal UKCS decommissioning sector touchpoint of the year — follows recent

Aberdeen-anchored procurement momentum: **DeepOcean's Aberdeen-managed FPSO decommissioning contract (21 May)** and Well-Safe Solutions' first UKCS well operatorship award (26 May), with the Well-Safe Defender semisubmersible mobilising this month. The OEUK CCS & Hydrogen Summit (1–2 June) further reinforced the connection between UKCS well decommissioning and CO<sub>2</sub> storage well conversion. Combined with the OEUK Issue 2 Well Decommissioning and Legacy Well Assessment for CO<sub>2</sub> Storage guidance, this is the most concentrated procurement-visibility window in Aberdeen this quarter.

**NES Sales Opportunity:** Aberdeen P&A, cementing, well intervention, OSV, ROV, subsea cutting, well-integrity and project management firms attending SPE Aberdeen this week should **use the conference programme to lock in 2026–27 sub-contract opportunities** with DeepOcean, Well-Safe Solutions, Petrofac, TAQA, Repsol, Harbour Energy and Serica decommissioning teams. Firms with case-study evidence of CO<sub>2</sub>-storage well-integrity assessment should engage cement-cluster and Eni Liverpool Bay teams in parallel — the decommissioning and CCUS workstreams now overlap.

## 8. Hydropower & Pumped Storage

### Ofgem Confirms June 2026 LDES Minded-To Decisions — Fidra Acquires 1 GW Enderby BESS (2–3 June 2026)

On **2 June 2026**, Ofgem confirmed in its monthly Spark newsletter that **it will publish minded-to decisions on Long-Duration Electricity Storage (LDES) projects in June 2026** — those projects Ofgem is provisionally selecting for cap-and-floor support — alongside a consultation testing those decisions. This is the most concrete LDES timeline confirmation to date and the principal near-term catalyst for UK pumped-storage and large-scale BESS investment. On **3 June 2026**, Edinburgh-based **Fidra Energy acquired the 1,025 MW Enderby BESS project** from Innova — a Leicestershire project that secured planning consent in May 2025 and is eligible for the first UK LDES cap-and-floor application round, with a regulatory decision expected this summer and FID targeted for 2027. The acquisition takes Fidra's UK BESS pipeline to **over 4.1 GW**, adding to its 1.4 GW Thorpe Marsh (under construction) and 500 MW West Burton (FID this month). The Innova → Fidra Enderby deal is the third utility-scale BESS sale by Innova in 12 months, totalling over 2.4 GW of capacity changing hands ahead of the LDES decisions.

**NES Sales Opportunity:** With Ofgem's LDES minded-to decisions due in June, the **next 30 days are the final pre-decision engagement window** for NES suppliers targeting Scottish pumped-storage projects (Coire Glas, Earba, Statkraft Loch Kemp / Loch na Cathrach) and the wider GB BESS portfolio (Fidra, Sumitomo, Eelpower). NES **civil engineering, tunnelling, geotechnical, electrical infrastructure, switchgear, environmental monitoring and grid-connection specialist firms** should treat June as the critical procurement-positioning month. Aberdeen logistics and Highland-located capability should be embedded in capability submissions.

## 9. Policy & Regulatory Developments

### Scottish Energy Minister Stephen Gethins Keynote at OEUK Summit (2 June 2026)

On **2 June 2026**, newly-appointed **Scottish Government Minister for Europe, External Affairs and Energy Stephen Gethins** delivered the keynote address at the OEUK North Sea CCS & Hydrogen Summit in Edinburgh, framing CCS and hydrogen as central to decarbonising Scotland's heat, industry and power sectors, driving industrial development and supporting a just transition. The keynote is the first major Scottish Government engagement with the sector under the new cabinet and signals continued political alignment with North Sea CCUS and hydrogen scale-up post the May 2026 election.

## Ofgem Bill Discount Scheme + RIIO ED3 — Grid Investment Framework Set (May Roundup, 2 June 2026)

Ofgem confirmed in its May 2026 roundup published **2 June** that it has been appointed administrator of the Government’s Bill Discount Scheme — designed to provide **up to £250 per year off energy bills for households living near new electricity transmission infrastructure**. DESNZ aims to lay regulations to implement the scheme in Summer 2026 with first payments due in early 2027. Ofgem has also **set the rules for 2028–2033 electricity distribution grid investment (ED3) via the Sector Specific Methodology Decision**, with the five DNOs to submit business plans in December and the full price control settlement approved by end of 2027.

**NES Sales Opportunity:** The Bill Discount Scheme reduces local opposition risk for new transmission infrastructure — a **material de-risking factor for offshore wind grid-connection projects** particularly across the East Coast HVDC corridor and Scottish offshore export cables. NES **community engagement, environmental impact assessment, planning consultancy, civils, transmission cable and substation engineering firms** should position now for the accelerated grid-build cycle through ED3 (2028–33). Aberdeen consultancies advising DNOs on December business-plan submissions have a 6-month engagement window.

## 10. Key Upcoming Events for NES Companies

| Event   | Date             | Location           | Relevance   |
|---|------------------|--------------------|---|
| EAGE Annual Conference & Exhibition 2026          | 8–11 June 2026   | P&J Live, Aberdeen | Subsurface engineering / geothermal / CCS reservoir characterisation        |
| ECC NPT Pathfinder Application Deadline           | 12 June 2026     | Online             | CCUS Pathfinder full submissions close                                      |
| Global Offshore Wind 2026 (RenewableUK)           | 16–17 June 2026  | Manchester Central | Full offshore wind value chain — AR7/AR8 procurement positioning            |
| Ofgem LDES Minded-To Decisions                    | June 2026        | Online             | Cap-and-floor LDES project selection — pumped storage + BESS                |
| CfD Allocation Round 8 (AR8) Opens                | July 2026        | Online (DESNZ)     | Wind / hydrogen / floating CfD bidding window opens                         |
| Crown Estate Supply Chain Accelerator R3 Deadline | 3 July 2026      | Online             | Final application date for £15m UK offshore wind supply chain fund          |
| Scottish Renewables Supply Chain Conference 2026  | Q3 2026          | Glasgow            | Scottish renewables supply chain — ScotWind / Buchan / Muir Mhòr engagement |
| Floating Offshore Wind 2026                       | 7–8 October 2026 | P&J Live, Aberdeen | RenewableUK floating wind summit — ScotWind procurement positioning         |

## 11. Grant Funding & Support Mechanisms Active This Week

| Fund / Mechanism  | Value  | Deadline                      | Eligible NES Companies  |
|---|--|-------------------------------|---|
| Crown Estate Supply Chain Accelerator Round 3           | £15m total — 50% match £250k–£2m per project | 3 July 2026                   | UK fixed and floating offshore wind supply chain firms, plus port/port-related infrastructure                 |
| GBE Supply Chain Fund                                   | Up to £300m capital                          | 10 December 2026              | Manufacturers of offshore wind components, cables, foundations, nacelles                                      |
| Offshore Wind Growth Partnership Industrial Growth Fund | £300k – £25m per project                     | Rolling                       | Supply chain firms expanding or building offshore wind manufacturing  |
| ECC NPT Pathfinder Selection Process                    | Project support                              | 12 June 2026                  | CCUS project developers and supply chain — active post-OEUK Summit + Eni Liverpool Bay                        |
| CCUS Innovation 2.0 — Built Environment Sequestration   | Innovation grant                             | 2026 round open               | Carbon-storage innovators incl. mineralisation and monitoring   |
| UK Hydrogen Allocation Round 2 (HAR2)                   | CfD-style revenue support                    | Decisions expected mid-2026   | Electrolyser integrators, EPC contractors and supply chain for ~765 MW shortlist — Barrow/Cromarty precedents |
| LDES Cap and Floor (Ofgem)                              | Revenue support framework                    | Minded-to decisions June 2026 | Pumped storage hydro developers and Scottish civil / electrical supply chain                                  |

## 12. Sales Opportunity Summary for NES Supply Chain Companies

| Sector          | Opportunity   | Timing    | Priority |
|-----------------|---|-----------|----------|
| Hydropower      | Ofgem LDES minded-to decisions in June — Coire Glas / Earba / Statkraft / Enderby BESS engagement                           | Immediate | ★★★★★    |
| CCUS            | OEUK Summit + Morecambe Net Zero + Peak Cluster + Liverpool Bay/Bacton engagement — 18–36 MTPA cross-border CO <sub>2</sub> | Now–2028  | ★★★★★    |
| Hydrogen        | Protium/ITM Power Cromarty (Dec 2026 FID) + 70 MW Scottish portfolio — BoP/safety case/HAZID engagement                     | Now       | ★★★★★    |
| Fixed Wind      | AR8 Allocation Framework published — sub-contract framework decisions accelerate next 30–45 days                            | Urgent    | ★★★★★    |
| Fixed Wind      | Offshore Wind Fair Work Charter — 37 Tier-1/2 signatories as de facto AR7/AR8 buyer list                                    | Urgent    | ★★★★★    |
| Decommissioning | SPE Aberdeen Well Decommissioning 2026 + Well-Safe Defender mobilisation + DeepOcean FPSO follow-on                         | June 2026 | ★★★★★    |

| Sector          | Opportunity   | Timing    | Priority |
|-----------------|---|-----------|----------|
| Funding         | Crown Estate Supply Chain Accelerator Round 3 — £15m, 50% match, applications open through 3 July | Urgent    | ★★★★★    |
| Floating Wind   | Sonardyne/AMOG mooring monitoring + Muir Mhòr / Buchan ScotWind engagement                        | Now–2030s | ★★★★     |
| Decommissioning | CCUS legacy-well conversion (OEUK Issue 2 guidance) — Aberdeen well-integrity consultancies       | Now       | ★★★★     |
| Policy          | Ofgem Bill Discount Scheme + RIIO ED3 grid build-out — DNO business plan engagement               | 2026–2028 | ★★★★     |
| Geothermal      | Rystad/ThinkGeoEnergy EGS positioning + EAGE Aberdeen 8–11 June — subsurface skills transfer      | 2026–2030 | ★★★      |
| Marine / Tidal  | AR8 tidal ringfence imminent + Caudal Energy scale-up + MeyGen Phase 2                            | 2026–2028 | ★★★      |

*This briefing covers the period 31 May – 6 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.*

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