UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 15 August 2026

Coverage Period	Audience	Classification
9 – 15 August 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 15 August 2026 were dominated by the single most important UK decommissioning publication of the year and by two closing upstream consent windows that will reset UKCS producing life for a decade.

On Thursday 13 August the North Sea Transition Authority published its 2026 UKCS Decommissioning Cost and Performance Update, reporting a record £2.6 billion of decommissioning expenditure in 2025 (up from £2.4 billion in 2024), 257 well decommissionings and 114 permanent well abandonments (up from 238 and 103 in 2024), and £43.4 billion of decommissioning work still remaining across the UKCS at 2024 constant prices — marginally down on the previous year. The NSTA forecasts £21 billion of the remaining scope will be spent between 2025 and 2032, including £1.3 billion on wells decommissioning covering more than 250 well operations and over 100 final abandonments. Wells account for the largest single expenditure category and remain the largest capability opportunity for the NES supply chain over the next decade.

At the same time on 13 August, the NSTA and 17 UKCS operators — including INEOS Energy Europe, Shell, Adura and Eni UK — signed a Well Decommissioning Charter committing to accelerated well plugging and abandonment, rig-to-vessel switching and shared campaign delivery. Analysts estimate that switching well plug and abandonment from rig-based to vessel-based methods could cut UKCS well decommissioning costs by around 30%. The NSTA warned that the well decommissioning backlog now sits at more than 500 wells with a further 1,000 wells expected to require decommissioning over the next five years.

The NSTA also published its UKCS Wells Insights Report 2026 and its UKCS Production Efficiency Report 2025 on the same day — the largest single-day industry data release of the year.

On offshore wind, RES was appointed on 11 August by ScottishPower Renewables to provide Safety from the System for the 960 MW East Anglia TWO offshore wind farm off the Suffolk coast, creating 25 jobs across Lowestoft and Ipswich.

On BESS and pumped storage, Copenhagen Infrastructure Partners' 500 MW / 1,000 MWh Coalburn 1 battery in South Lanarkshire began commercial operations on 13 August — currently the largest operating BESS in Europe. European Energy secured a £58.1 million debt facility from Danske Bank on 12 August for the Indian Queens hybrid solar-plus-BESS project in Cornwall (68 MW solar with 47.5 MW / 95 MWh battery), and NextEnergy UK announced on 13 August the acquisition of a 107 MW / 151 MWh standalone BESS portfolio.

The Great British Energy Nuclear £4.6 billion commercial pipeline (14 contracts, published 4 August) was widely reported through the week, with the SMR delivery partner contract alone worth £1.09 billion. The Jackdaw OPRED consultation closed on Monday 10 August; Rosebank closes on Monday 17 August with Secretary of State Miatta Fahnbulleh expected to decide both consents in September. The Ofgem LDES special licence conditions call-for-input closes 18 August, and the DESNZ Strategic Policy Guidance for Electricity Networks Growth and Ofgem Energy Consumer Outcomes consultations close on 19 August. NES firms must submit formal responses across all four open windows this coming week.

1. Offshore Wind — Fixed Bottom

RES wins ScottishPower Safety from the System contract at East Anglia TWO — 25 jobs (11 August 2026)

ScottishPower Renewables appointed RES on 11 August to deliver Safety from the System services for the 960 MW East Anglia TWO offshore wind farm off the Suffolk coast. The contract will create 25 skilled roles across two operational bases in Lowestoft (offshore-focused) and Ipswich (onshore-focused). RES will manage the Safety from the System function ensuring safe electrical isolation, permitting and mobile switching operations across the export cable route, offshore substation and turbine array during construction, commissioning and O&M. East Anglia TWO is one of the three ScottishPower East Anglia hub projects (ONE, TWO, THREE) developed at the same site, with EA TWO taking final investment decision in 2024. First power is targeted before AR8 CfD delivery windows. The RES appointment follows a similar ScottishPower Safety from the System appointment at East Anglia THREE.

> **NES Sales Opportunity:** The RES award confirms Safety from the System as a bankable revenue stream for offshore-wind electrical services firms and creates 25 direct roles on the English east coast. NES Tier 2/3 firms in hazardous-area electrical, high-voltage substation, authorised person / senior authorised person training, permit management, competency and QHSE should approach RES East Anglia procurement plus ScottishPower Renewables (Glasgow HQ, Aberdeen presence) to be positioned as approved sub-contractors on ScottishPower's hub build-out and on future AR8 East Anglia scope. Direct Aberdeen engagement points also include SP Energy Networks.

AR8 CfD qualification phase active: 10 August – 16 September 2026 (August 2026)

The eighth Contracts for Difference Allocation Round (AR8) closed for applications on 7 August 2026. NESO qualification assessment runs from 10 August through 16 September 2026 across all AR8 pots including Pot 3 (fixed-bottom offshore wind with over 17 GW of eligible capacity at £113/MWh 2024 prices) and Pot 4 (floating offshore wind and ODOW at £271/MWh with approximately 800 MW of floating eligible). AR8 is the first allocation round to require Gate 2 (or Gate 1 CPCR) connection status. The DESNZ Contract Budget Notice is expected in November. Results will be announced across all technologies between 27 November 2026 (earliest) and 17 February 2027 (latest). The AR8 Pot 3 clearing structure is split by transmission tariff zones 1–12 versus 13–27. NES firms should assume this week is decisive for Tier 1 EPCI subcontract lock-in ahead of NESO qualification decisions.

> **NES Sales Opportunity:** NES firms must confirm subcontracting Letters of Intent this week with the Tier 1 EPCIs and OEMs bidding into Pot 3: ScottishPower Renewables, SSE Renewables, Ocean Winds, Iberdrola, Vattenfall, Equinor and the Ossian JV (SSE/CIP/Marubeni). Priorities are foundation fabrication, dynamic cabling, offshore substation electrical, hazardous-area electrical, coatings, marine coordination and topsides commissioning. Aberdeen developer offices are direct engagement points. Clean Industry Bonus now applies across all AR8 offshore-wind categories so UK content evidence is decisive at bid.

Ofgem consultation on DNO connection notice periods still open following July close (August 2026)

Ofgem's ongoing regulatory workstream on distribution network operator connection notice periods, launched in July 2026, continues to progress alongside AR8 qualification. The workstream is intended to give major infrastructure connection users — including offshore-wind onshore substations, hydrogen and BESS — improved certainty on connection timing and notice. Follow-up decisions are expected in Q4 2026. The workstream is separate from the wider Gate 2 connection reform and is a relevant tributary policy input for NES supply-chain firms delivering onshore substation, HV cable and connection engineering scope.

2. Floating Offshore Wind

AR8 Pot 4 floating and ODOW qualification underway alongside fixed-bottom (August 2026)

AR8 Pot 4 (floating offshore wind and Other Deepwater Offshore Wind at £271/MWh) is in the NESO qualification phase from 10 August to 16 September. Approximately 800 MW of floating offshore wind was eligible for AR8. Pot 4 rules include a 24-month Longstop Period (up from 12) and Required Installed Capacity threshold of 85% (down from 95%) at Target Commissioning Window to acknowledge the scale and complexity of floating and deepwater projects. Government has visibility of anonymised sealed bids across floating and ODOW as well as fixed-bottom. Priority AR8 Pot 4 bidders are expected to include Salamander, Cenos, MarramWind, Green Volt and Llŷr plus ODOW-eligible novel-foundation projects.

> **NES Sales Opportunity:** Floating supply-chain firms should now confirm 2027–28 delivery commitments with Pot 4 bidders during qualification, not after result day. Priority sub-contract lock-in areas include floating foundation fabrication, dynamic cabling, mooring, offshore substation topsides, hazardous-area electrical and marine coordination. The 24-month Longstop supports a longer runway to deliver Scottish-fabricated floating content.

Floating Offshore Wind Conference 2026 confirmed for 7–8 October 2026 (August 2026)

RenewableUK's Floating Offshore Wind Conference has been confirmed for 7–8 October 2026 (superseding earlier draft calendar entries). The conference remains the flagship UK floating wind gathering and is expected to attract developers (Green Volt, Cenos, MarramWind, Salamander, Bellrock, Llŷr), Tier 1 EPCIs (Aker Solutions, Saipem, Unitech, Nadara), certifiers (DNV, ABS, LR) and floating supply chain firms. Pre-conference OEUK and RenewableUK breakfast meetings in Aberdeen are typically scheduled the week before. NES firms should hold conference dates and begin diary bookings with Aker Solutions, Nadara, ScotWind developers and Encomara/Aurora for Squid demonstration follow-up.

> **NES Sales Opportunity:** The 7–8 October Floating Offshore Wind Conference is now the single most important UK floating wind sales meeting of the year for NES Tier 2/3 firms. NES firms should confirm attendance now, pre-book meetings with Aker Solutions, Nadara, Salamander, Green Volt, Cenos and MarramWind, and use the eight-week runway to finalise pitch materials for floating supply.

3. Hydrogen

Fusion Draft National Policy Statement (EN-8) consultation closes Monday 17 August (August 2026)

DESNZ's Draft National Policy Statement for fusion energy (EN-8) consultation closes on Monday 17 August 2026 via GOV.UK citizen space. EN-8 is the UK's first dedicated fusion siting and consenting framework and supports the STEP (Spherical Tokamak for Energy Production) fusion prototype at West Burton by 2040. Fusion prototypes require large-scale hydrogen handling, cryogenic gas systems and tritium containment. Formal responses become part of the supply-chain evidence base for future fusion procurement decisions. NES firms with tritium, cryogenic and high-purity gas handling capability, high-integrity welding, hazardous-area electrical, NDT, coatings and QHSE experience should submit formal responses this week referencing UKAEA STEP and West Burton siting.

> **NES Sales Opportunity:** The 17 August EN-8 deadline is the last opportunity in 2026 to establish formal supply-chain credentials with the emerging UK fusion cluster. Formal responses are required this week explicitly referencing UKAEA/STEP capability. Submissions become part of the future fusion procurement supply chain evidence base.

HAR2 electrolytic hydrogen contract awards remain scheduled for later in 2026 (August 2026)

The HAR2 (Hydrogen Allocation Round 2) contract awards remain scheduled for later in 2026 with no material published progress this week. HAR2 will award new electrolytic hydrogen contracts building on the December 2023 HAR1 portfolio. Scottish HAR2 candidate sites include Sullom Voe (Veri Energy/EnQuest) and Grangemouth Cromarty (Ineos) with pre-FEED continuing. HAR3 process design also continues. Hydrogen production and industrial demand remain anchor priorities within the DESNZ Modern Industrial Strategy Year 1 review.

HAR1 electrolytic hydrogen portfolio execution transition continues (August 2026)

The HAR1 electrolytic hydrogen contract portfolio, awarded in December 2023, continues its transition from FEED to execution during August 2026 with no headline announcements this week. Barrow Green Hydrogen (30 MW PEM, developed by GHECO/Carlton/Schroders with Ramboll as Owner's Engineer) remains the closest HAR1 project to FID. Wider HAR1 delivery timing pressures continue across the portfolio. NES firms should stay engaged with HAR1 developers and Owner's Engineers ahead of expected HAR2 awards later in 2026.

4. CCUS

Ongoing Track 1 CCS mobilisation continues at HyNet and NEP (August 2026)

Track 1 CCS mobilisation continues into August with no material new headlines this week. The Liverpool Bay CO_2 storage seabed lease with Eni CCUS Holding (signed 29 July, unlocking 109 Mt storage and £2 billion supply-chain investment) and Northern Endurance Partnership offshore construction at Hartlepool (Saipem mobilised 27 July for the 149 km subsea CO_2 pipeline) remain the current focus of Track 1 delivery. NEP has now awarded over £2 billion to more than 260 UK companies. Track 1 first CO_2 injection remains targeted for 2028. Track 2 (Acorn, Viking) awaits final development consent, with Acorn Peterhead expected to reach FID in 2026. The NSTA 2nd Offshore CO_2 Storage Licensing Round remains anchored on the Penspen and DNV pipeline studies published on 30 July.

> **NES Sales Opportunity:** Track 1 CCS is now firmly in construction mobilisation with limited new headline announcements this week. NES firms in subsea pipeline installation, ROV support, geotechnical, high-integrity welding, coatings and marine coordination should continue to approach Saipem (Aberdeen and London), Eni CCUS Holding, and Wood/Petrofac/Worley as expected Tier 1 EPCIs. Track 2 positioning window remains open for Acorn Peterhead and Viking Humber through 2027 — Aberdeen firms with subsea gas-field decommissioning credentials have directly transferable capability.

5. Marine & Tidal

UK marine and tidal Q3 delivery pipeline holds through August (August 2026)

The UK marine and tidal delivery pipeline remained stable through 9–15 August with no material new UK-specific headline announcements. Ongoing 2026 pipeline reference points include CorPower Ocean's C4 wave energy converter with DNV certification, EMEC Orkney demonstrator deployments, Mocean Energy Edinburgh's floating data centre concept (following its £5 million raise in July 2026) and continued policy engagement on marine spatial planning for Celtic Sea and Scottish west coast test sites. NES firms should keep marine and tidal on their annual sales calendar even in quiet news weeks as the pipeline of 2027–28 demonstrator deployments is material.

> **NES Sales Opportunity:** Marine and tidal remains an adjacent-market opportunity for NES firms with floating platform, mooring, cabling, marine coordination and offshore commissioning credentials. Mocean Energy Edinburgh, CorPower Ocean, and EMEC Orkney remain the priority engagement points. Continue to include marine/tidal in monthly sales pipeline reviews.

6. Geothermal

Northern Ireland deep-geothermal consultation now in response analysis (August 2026)

Following the closure of the Northern Ireland deep-geothermal consultation (Department for the Economy) on 7 August, the Department is now analysing formal responses. The consultation covered regulatory framework, licensing and support mechanisms for deep-geothermal energy in Northern Ireland. Northern Ireland has some of the best UK deep-geothermal resources (Larne Basin, Lough Neagh Basin) and the DfE policy paper is due later in 2026. This is the first regulatory step towards a live deep-geothermal market on the island. UK-wide deep-geothermal remains a small but growing capability area with directly transferable UKCS wells, drilling and HV electrical experience.

> **NES Sales Opportunity:** The Northern Ireland deep-geothermal consultation response analysis phase creates a soft-engagement window for NES firms with drilling, HV electrical, mechanical, high-integrity welding, coatings and QHSE credentials transferable from UKCS oil and gas. Pre-position with NI stakeholders (DfE, NI Water, Belfast Council) ahead of the policy paper later in 2026. Aberdeen well-abandonment technology and workforce are directly transferable.

7. Decommissioning

NSTA UKCS Decommissioning Cost and Performance Update 2026 published: £43.4bn remaining, £2.6bn 2025 spend (13 August 2026)

The North Sea Transition Authority published its 2026 UKCS Decommissioning Cost and Performance Update on Thursday 13 August 2026 — the single most important UK decommissioning industry publication of the year. Headline findings: record £2.6 billion of UKCS decommissioning expenditure in 2025 (up from £2.4 billion in 2024); 257 well decommissionings completed and 114 permanent well abandonments in 2025 (up from 238 well decommissionings and 103 abandonments in 2024); and £43.4 billion of total UKCS decommissioning work still remaining at 2024 constant prices (marginally down on the previous year). The NSTA forecasts £21 billion of remaining scope will be spent between 2025 and 2032, including approximately £1.3 billion on wells decommissioning covering more than 250 well operations and over 100 final abandonments in the same period. Wells account for the largest single expenditure category. The Update was accompanied by the UKCS Wells Insights Report 2026 and the UKCS Production Efficiency Report 2025, both published on the same day.

> **NES Sales Opportunity:** The 13 August NSTA cost data reconfirms UKCS decommissioning as the single largest, longest-dated addressable market for NES Tier 2/3 supply chain through 2035. Wells P&A is the largest single opportunity. NES firms in wells, topsides removal, subsea infrastructure, ROV, coatings, high-integrity welding, marine coordination, NDT and QHSE should now formalise 2027–32 forward workbooks with operator planning teams. Approach NSTA Aberdeen, OEUK Decommissioning Committee, Bureau Veritas, Boskalis Subsea and INEOS Energy Europe procurement immediately.

Well Decommissioning Charter signed by NSTA and 17 operators — rig-to-vessel switch could cut costs 30% (13 August 2026)

On 13 August the NSTA and 17 UKCS operators signed a Well Decommissioning Charter committing to accelerated well plug and abandonment, rig-to-vessel switching and shared campaign delivery. Signatories include INEOS Energy Europe (which holds the largest UKCS well decommissioning backlog), Shell UK, Adura and Eni UK, alongside 13 further operators. Industry analysts estimate that switching well plug and abandonment from rig-based to vessel-based execution could cut UKCS well decommissioning costs by around 30%. The Charter's stated objective is to accelerate execution across the current 500-well UKCS backlog and to prepare industry capability ahead of an anticipated further 1,000 wells requiring decommissioning over the next five years. The Chemical Engineer and World Oil both flagged operator commentary that industry has not been moving fast enough on well decommissioning despite recent progress.

> **NES Sales Opportunity:** The Well Decommissioning Charter creates the largest UK P&A commercial opportunity in a decade. NES firms with rigless well intervention, coiled tubing, riserless P&A, wireline, well cementing, plug material innovation, integrated well engineering and remote-vessel P&A capability should approach INEOS Energy Europe procurement, Shell UK, Adura, Eni UK, Well-Safe Solutions and Elemental Energies immediately. Vessel-based P&A capability is a decisive commercial differentiator. Aberdeen wells expertise is directly transferable.

NSTA UKCS Wells Insights Report 2026: reinstated wells produced 16m boe in 2025 (13 August 2026)

The NSTA UKCS Wells Insights Report 2026 published on 13 August reports that reinstated UKCS wells produced 16 million barrels of oil equivalent in 2025 — highlighting the value of well workovers, sidetracks and reinstatements as an economic bridge for UKCS assets ahead of full decommissioning. The report was published alongside the Decommissioning Cost and Performance Update and covers well drilling, well workover, well intervention and P&A activity across the UKCS. Well reinstatement activity supports UKCS production continuity and creates immediate commercial scope for well services, wireline, coiled tubing and integrated well engineering firms.

NSTA UKCS Production Efficiency Report 2025 published — supports life-extension case (13 August 2026)

The NSTA also published its UKCS Production Efficiency Report 2025 on 13 August. Production Efficiency remains a key NSTA performance benchmark measuring UKCS producing assets' output versus theoretical maximum. The 2025 Report supports NSTA arguments for continued asset life extension, well intervention investment and integrated late-life field services. The Report is a critical planning input for NES late-life and decommissioning sales pipelines and reinforces continued Petrofac, Wood, Worley and Well-Safe framework demand into 2027–28.

BP UKCS divestment process ongoing — bidder engagement continues into H1 2027 (August 2026)

BP's UK North Sea business sale (announced 31 July under Murray Auchincloss, advised by Morgan Stanley and Rothschild) continues into supplier due diligence and bidder engagement. Expected bidders remain Ithaca Energy, EnQuest, Serica, Harbour Energy and international private-equity vehicles. Transaction timing is expected to run into H1 2027. Hundreds of NES Tier 2/3 contracts across marine, subsea, wells, decommissioning, ROV, geotechnical, coatings, NDT and QHSE remain in transition review. Combined with the Well Decommissioning Charter, the BP process reinforces the concentration of UKCS commercial opportunity in the well decommissioning and late-life services segments.

8. Hydropower & Pumped Storage

CIP Coalburn 1 500 MW / 1,000 MWh BESS begins commercial operations — largest operating BESS in Europe (13 August 2026)

Copenhagen Infrastructure Partners' Coalburn 1 500 MW / 1,000 MWh BESS in South Lanarkshire, Scotland, began commercial operations on 13 August 2026. Coalburn 1 is currently the largest operating battery energy storage system in Europe and is anchored on the former Coalburn coal mine site. The project delivers 2-hour duration storage and joins the National Grid balancing market with 24/7 revenue potential. Commercial operations at Coalburn 1 mark a decisive milestone for Scottish grid storage capacity and demonstrate Scotland's ability to deliver very-large-scale storage assets. CIP retains significant BESS pipeline capacity across the UK.

> **NES Sales Opportunity:** The Coalburn 1 commercial ops start creates immediate O&M sub-contract scope in South Lanarkshire. NES firms in HV electrical, BESS O&M, thermal management, fire protection, hazardous-area electrical and cyber-secure control systems should approach CIP UK, Coalburn 1 site operator and O&M framework holders. The site also demonstrates delivery capability that supports CIP's future UK BESS pipeline including additional Scottish sites.

Ofgem LDES Window 1 minded-to consultation now closed — special licence conditions call-for-input closes 18 August (August 2026)

Ofgem's LDES cap-and-floor Window 1 minded-to consultation formally closed on 7 August. The 16-project minded-to portfolio (7,645 MW / 136.9 GWh) includes three Scottish pumped storage schemes: Coire Glas 1,440 MW (SSE Renewables), Loch Kemp 660 MW (Statera Energy) and Earba 1,800 MW (Gilkes Energy), 11 lithium-ion battery projects, TeesCAES 50 MW compressed-air and Frontier Legacy 65 MW vanadium/zinc flow. The parallel LDES draft special licence conditions call-for-input closes at 11:59pm on 18 August. Final cap-and-floor awards are expected in autumn 2026. Key licence changes still under review include Delivery Plan governance, graduated Back Stop Delay Factor, availability target of 92.5% for pumped storage, short-cycling restrictions and P90 cost overrun treatment.

> **NES Sales Opportunity:** The 18 August LDES special licence conditions deadline is the last formal Ofgem input window before autumn 2026 awards. NES firms delivering into LDES contracts — high-voltage electrical, mechanical fabrication, hazardous-area electrical, control systems, hydraulic engineering, tunnelling, coatings and welding — should submit formal responses citing Delivery Plan governance impact on Coire Glas, Loch Kemp and Earba subcontracting timelines. Continue lock-in engagement with SSE Renewables Perth/Aberdeen, Statera Energy and Gilkes Energy.

European Energy £58.1m Danske Bank financing for Indian Queens hybrid solar-BESS in Cornwall (12 August 2026)

European Energy secured a £58.1 million debt facility from Danske Bank on 12 August 2026 for the Indian Queens hybrid project in Cornwall. Indian Queens combines a 68 MW solar array with a co-located 47.5 MW / 95 MWh battery energy storage system on a single grid connection. It is European Energy's first UK financing under its expanded UK hybrid portfolio and represents a template for future solar-plus-BESS financings in southern England. Danske Bank's continued UK BESS lending presence — alongside Santander UK, HSBC and Investec — supports continued UK grid storage delivery through 2027.

> **NES Sales Opportunity:** The Indian Queens financing puts a further solar-plus-BESS project into UK EPC mobilisation in Cornwall. NES firms in HV electrical, hazardous-area systems, civils, structural steel (BHC Ltd), coatings, QHSE and marine coordination for grid-tied solar-BESS hybrids should approach European

> Energy UK, its solar EPC partner and Danske Bank UK relationship team. Hybrid solar-BESS scope is expected to grow across southern England through 2027.

NextEnergy UK acquires 107 MW / 151 MWh standalone BESS portfolio (13 August 2026)

NextEnergy UK announced on 13 August 2026 the acquisition of a 107 MW / 151 MWh UK standalone BESS portfolio. The transaction is part of NextEnergy's expanded UK BESS strategy alongside its existing solar-plus-BESS portfolio. The acquired assets are expected to enter commercial operations across 2026–27 and add to the growing volume of UK grid storage reaching operational status. NextEnergy joins a widening list of UK BESS owner-operators including Zenobe, Fidra Energy, Statera, Frontier, Brockwell Energy, Econergy and Masdar UK.

Ongoing LDES Window 1 pumped storage engagement remains a decade-defining opportunity (August 2026)

The Scottish pumped storage schemes in the LDES Window 1 minded-to portfolio — Coire Glas 1,440 MW, Loch Kemp 660 MW and Earba 1,800 MW — remain the largest concentrated UK pumped storage procurement wave in a generation. Autumn 2026 final cap-and-floor awards will trigger multi-year construction subcontracting rounds through 2032. Additional Scottish schemes outside Window 1 (Balliemeanoch, Loch na Cathrach, Fearna) remain in earlier development and could participate in future LDES windows.

9. Policy

Jackdaw OPRED consultation closed — Fahnbulleh decision expected September (10 August 2026)

The Jackdaw OPRED public consultation, launched by DESNZ under Secretary of State Miatta Fahnbulleh, closed on Monday 10 August 2026. Jackdaw is one of the two Adura upstream projects (with Rosebank) covered by court-ordered public consultation on the climate impact of scope 3 emissions following the Supreme Court's Finch judgment. Adura, Equinor and Shell (JV partner) submitted formal representations backing Jackdaw supplying more than 6% of UK gas demand next winter (equivalent to 1.4 million households) and displacing UK production would create emissions up to four times higher via imports. OEUK filed its formal responses on both projects on 28 July. The DESNZ decision on Jackdaw is expected in September per Herald Scotland reporting on 12 August. The Pinsent Masons analysis on 11 August highlighted the tension between the OPRED consultation process and UK government energy security policy, with Fahnbulleh signalling a pragmatic route to consent.

> **NES Sales Opportunity:** The imminent Jackdaw decision unlocks material NES upstream Tier 2/3 workbook capacity. NES firms with existing or pre-qualified positions on Adura (Equinor operated) and Shell frameworks should confirm subcontracting Letters of Intent and post-consent mobilisation plans this fortnight ahead of the September decision. Marine, subsea, wells, ROV, coatings and QHSE scope. Approach Aberdeen offices directly. Anti-consent legal risk remains material but the Burnham government's pragmatic public position and OEUK evidence base support approval.

Rosebank OPRED consultation closes Monday 17 August — decision expected September (August 2026)

The Rosebank OPRED public consultation closes at 23:59 on Monday 17 August 2026. Rosebank is one of the largest untapped UKCS oil fields with Equinor as operator and Ithaca Energy as partner. Herald Scotland reported on 12 August that Miatta Fahnbulleh could deliver decisions on both Jackdaw and Rosebank as early as September. GERS figures published this week noted the material Scottish tax revenue contribution from continued North Sea production. Anti-consent campaign groups continued to file evidence through the week. OEUK cited £28.7 billion of gross value added over the combined Adura fields' lifespans, £1.4 billion of tax revenues before the end of this Parliament rising to £3.8 billion by 2034. The Rosebank decision is expected to be the single most consequential UKCS upstream consent decision of 2026.

> **NES Sales Opportunity:** The 17 August Rosebank consultation close is the final formal input window ahead of the Fahnbulleh decision expected in September. NES firms should submit brief supply-chain benefit position statements to OPRED referencing Aberdeen jobs, GVA and supply-chain capability. Post-consent mobilisation plans and subcontract Letters of Intent with Adura, Equinor Aberdeen and Ithaca frameworks should be confirmed this fortnight.

DESNZ Strategic Policy Guidance for Electricity Networks Growth response deadline 19 August (August 2026)

The DESNZ Strategic Policy Guidance for Electricity Networks Growth (SPG) consultation closes on Wednesday 19 August 2026. The SPG sets forward guidance to Ofgem on RIIO-ED3, RIIO-T3, connection reform and infrastructure investment across the transmission and distribution networks needed to enable AR8-and-beyond offshore wind, CCUS, hydrogen and BESS delivery. It is expected to formalise DESNZ direction on Gate 2 connection reform, Reformed National Pricing versus Zonal Grid pricing, and constraint management funding. This is a critical policy input for NES supply-chain planning through 2030 and should be treated as high priority for formal industry response this week.

> **NES Sales Opportunity:** The 19 August SPG deadline is the strategic policy engagement window for NES firms with grid, HV substation, connection, cable and hazardous-area electrical scope. Formal responses citing UKCS-adjacent grid capacity needs, ScotWind and Bellrock connection timelines, and LDES pumped storage delivery unlocks are valuable positioning inputs. Coordinate with Scottish Renewables, RenewableUK and Offshore Wind Scotland trade body submissions this week.

Ofgem Energy Consumer Outcomes consultation closes 19 August (August 2026)

The Ofgem Energy Consumer Outcomes consultation, which sets the implementation framework for consumer protection under the retail market reform, closes on 19 August 2026. The consultation is primarily relevant for suppliers, distribution network operators and consumer-facing energy services. Read-across for NES firms is limited but the consultation is a signal of Ofgem's continued regulatory workstream pace during August. It complements the LDES special licence and DESNZ SPG deadlines the same week.

Fusion Draft National Policy Statement (EN-8) consultation closes Monday 17 August (August 2026)

DESNZ's Draft National Policy Statement for fusion energy (EN-8) closes on 17 August via GOV.UK citizen space (see also Section 3). EN-8 is the UK's first dedicated fusion planning framework, supporting STEP at West Burton by 2040. Formal responses become part of the evidence base for future fusion planning consent decisions. Read-across for NES supply chain includes tritium handling, cryogenic gas systems, high-purity welding, hazardous-area electrical and QHSE.

Great British Energy Nuclear publishes £4.6bn 14-contract commercial pipeline (published 4 August, reported 9 August 2026)

Great British Energy Nuclear's £4.6 billion commercial pipeline of 14 procurement contracts — published 4 August by GBE-Nuclear and widely reported across industry press on 9 August — sets out the SMR delivery partner contract (£1.09 billion), main works contract (£910 million–£1.82 billion) and 12 further contracts covering site infrastructure, safety, licensing and supply-chain support. The GBE-Nuclear pipeline includes contract award targets across 2026–28 and represents the largest UK new-nuclear supply-chain procurement window of the decade. Rolls-Royce SMR remains the preferred UK SMR delivery vehicle following the 2024 selection. NES firms with nuclear-transferable capability across pressure vessel welding, hazardous-area electrical, coatings, QHSE and heavy fabrication should engage.

> **NES Sales Opportunity:** The GBE-Nuclear £4.6bn pipeline is a fresh commercial procurement window opening in H2 2026. NES firms with high-integrity welding, pressure-vessel capability, hazardous-area electrical, nuclear-grade coatings, radiological QHSE, heavy fabrication, NDT and integrated project management should register interest with Great British Energy Nuclear procurement, Rolls-Royce SMR Derby and DESNZ Nuclear Directorate. Aberdeen high-integrity welding and gas containment capability is directly transferable.

10. Key Upcoming Events for NES Companies

Time-critical UK events, deadlines and windows for NES Tier 2/3 supply chain over the next 8 weeks:

Date	Event / Deadline	Location / Body	NES Action
17 Aug 2026	Rosebank OPRED consultation closes — Fahnbulleh decision expected September	DESNZ / OPRED	Submit position statement
17 Aug 2026	Fusion Draft NPS EN-8 consultation closes	DESNZ (GOV.UK)	Submit response
18 Aug 2026	Ofgem LDES draft special licence conditions call-for-input closes (11:59pm)	Ofgem	Submit response
19 Aug 2026	DESNZ Strategic Policy Guidance for Electricity Networks Growth response deadline	DESNZ	Submit response
19 Aug 2026	Ofgem Energy Consumer Outcomes consultation closes	Ofgem	Track policy
27 Aug 2026	UK plug-in solar becomes legal (SI 2026/848)	UK-wide	Note residential market change
10 Aug – 16 Sep 2026	NESO AR8 qualification assessment window	NESO	Support Tier 1 bid submissions
30 Sep 2026	GBE Supply Chain Fund R3 closes; Abandonment Fee Rules commence	GBE / NSTA	Submit R3 application if eligible
1 Oct 2026	VAT off electricity bills (Burnham first policy)	UK-wide	Consumer / commercial impact
7–8 Oct 2026	Floating Offshore Wind Conference 2026	RenewableUK (Aberdeen)	Attend; confirm LOIs with floating developers
28 Oct 2026	Autumn Budget 2026	HM Treasury	Monitor energy tax measures
Autumn 2026	Ofgem LDES final cap-and-floor awards	Ofgem	Confirm supply-chain LOIs
Autumn 2026	DESNZ HAR2 electrolytic hydrogen contract awards	DESNZ	Position with HAR2 developers
Sept 2026 (expected)	DESNZ decision on Jackdaw and Rosebank consents	DESNZ / Fahnbulleh	Post-consent mobilisation LOIs

Date	Event / Deadline	Location / Body	NES Action
27 Nov 2026 – 17 Feb 2027	AR8 results announcement window	DESNZ / LCCC	Prepare post-award mobilisation
H2 2026–28	Great British Energy Nuclear £4.6bn 14-contract pipeline	GBE-Nuclear / Rolls-Royce SMR	Register interest with GBE-Nuclear procurement

11. Grant Funding & Support Mechanisms Active This Week

Active UK grant, contract and support windows relevant to NES Tier 2/3 supply chain:

Mechanism	Body / Sponsor	Deadline / Status	NES Relevance
AR8 CfD Allocation Round	DESNZ / LCCC / NESO	Qualification 10 Aug – 16 Sep 2026; results 27 Nov – 17 Feb 2027	Support Tier 1 bids during NESO qualification
Clean Industry Bonus (AR8, all OW)	DESNZ	Payments on delivery	Demonstrate UK content evidence
LDES draft special licence conditions	Ofgem	Call for input closes 18 Aug 2026 (11:59pm)	Formal response if delivering LDES contracts
DESNZ Strategic Policy Guidance	DESNZ / Ofgem	Response deadline 19 Aug 2026	Formal industry response
Ofgem Energy Consumer Outcomes	Ofgem	Response deadline 19 Aug 2026	Track policy
Fusion NPS EN-8	DESNZ (GOV.UK)	Closes 17 Aug 2026	Submit response — tritium/cryogenic supply chain
GBE Supply Chain Fund Round 3	Great British Energy	Closes 30 Sep 2026	Submit fabrication / manufacturing bids
LDES Cap-and-Floor Window 1	Ofgem	Minded-to consultation closed 7 Aug; final awards autumn 2026	Position for pumped storage + BESS
GBE-Nuclear £4.6bn commercial pipeline	Great British Energy Nuclear	Contracts across 2026–28	Register interest with GBE-Nuclear procurement
HAR2 electrolytic hydrogen contracts	DESNZ	Awards later in 2026	Position with HAR2 developers (Sullom Voe, Grangemouth)
Track 1 / Track 2 CCS supply chain	DESNZ	Track 1 mobilisation live; Track 2 open	Approach Saipem, Eni CCUS, Wood, Petrofac, Worley
NSTA Well Decommissioning Charter delivery	NSTA / 17 UKCS operators	Live from 13 Aug 2026	Rig-to-vessel P&A capability positioning

12. Sales Opportunity Summary for NES Supply Chain Companies

Prioritised opportunities from this week's activity. Star rating reflects immediacy and NES fit: ★★★★★ = time-critical this fortnight; ★★★★ = active this quarter; ★★★ = position for 2027; ★★ = watch.

Opportunity	NES Supply Chain Action	Contact / Body	Priority
NSTA Well Decommissioning Charter — rig-to-vessel P&A (13 Aug)	Approach INEOS Energy Europe, Shell UK, Adura and Eni UK on rigless P&A, riserless well intervention, wireline, coiled tubing, well cementing, plug material innovation and integrated well engineering. Vessel-based P&A capability is a decisive commercial differentiator. Aberdeen wells expertise directly transferable. Well-Safe Solutions and Elemental Energies are natural NES partners.	INEOS Energy Europe; Shell UK; Adura; Eni UK; NSTA	★★★★★
NSTA UKCS Decommissioning Update — £43.4bn remaining, £21bn to 2032 (13 Aug)	Formalise 2027–32 forward workbooks with operator planning teams. Focus on wells P&A (largest single line), topsides removal, subsea infrastructure, ROV, coatings, high-integrity welding, marine coordination, NDT and QHSE. Approach NSTA Aberdeen, OEUK Decommissioning Committee, Bureau Veritas and Boskalis Subsea immediately.	NSTA; OEUK; Bureau Veritas; Boskalis Subsea	★★★★★
Rosebank + Jackdaw consent (10–17 Aug close, Sept decision)	Submit brief supply-chain benefit position statements to OPRED. Confirm subcontract Letters of Intent with Adura (Equinor Aberdeen), Ithaca and Shell UK frameworks. Marine, subsea, wells, ROV, coatings and QHSE scope for post-consent mobilisation.	Adura (Equinor); Ithaca; Shell UK; DESNZ/OPRED	★★★★★
AR8 CfD qualification (10 Aug – 16 Sep)	Confirm subcontract LOIs with Tier 1 EPCIs across foundations, cabling, hazardous-area electrical, offshore substation, coatings and marine coordination. ScottishPower, SSE, Ocean Winds, Iberdrola, Ossian, Vattenfall. Aberdeen developer offices direct engagement.	ScottishPower, SSE, Ocean Winds, Iberdrola, Ossian, Vattenfall Aberdeen	★★★★★
Ofgem LDES special licence conditions (closes 18 Aug)	Submit formal response citing Delivery Plan governance impact on Coire Glas, Loch Kemp and Earba subcontracting timelines. Continue direct SSE Renewables, Statera Energy, Gilkes Energy engagement for autumn 2026 award LOIs.	Ofgem LDES team; SSE; Statera; Gilkes	★★★★★
DESNZ SPG Networks Growth (closes 19 Aug)	Submit formal response citing UKCS-adjacent grid capacity needs, ScotWind connection timelines, LDES pumped storage delivery unlocks. Coordinate with Scottish Renewables, RUK and Offshore Wind Scotland submissions.	DESNZ; Ofgem; Scottish Renewables	★★★★★
Fusion NPS EN-8 (closes 17 Aug)	Submit formal response as tritium / cryogenic / high-purity welding / hazardous-area electrical supply chain. Establish credentials with UKAEA / STEP West Burton cluster. Last 2026 window for fusion positioning.	DESNZ; UKAEA	★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
RES / ScottishPower East Anglia TWO Safety from the System	Approach RES East Anglia procurement (Lowestoft/Ipswich) plus ScottishPower Renewables (Glasgow/Aberdeen) for hazardous-area electrical, HV substation, permit management and QHSE approved-subcontractor status. Read-across to future AR8 East Anglia scope.	RES East Anglia; ScottishPower Renewables	★★★★
CIP Coalburn 1 500 MW BESS commercial ops (13 Aug)	Approach CIP UK, Coalburn 1 site operator and O&M framework holders for HV electrical, BESS O&M, thermal management, fire protection, hazardous-area electrical and cyber-secure control system subcontracts.	CIP UK; Coalburn 1 operator	★★★★
GBE-Nuclear £4.6bn 14-contract pipeline (published 4 Aug)	Register interest with GBE-Nuclear procurement, Rolls-Royce SMR Derby and DESNZ Nuclear Directorate. High-integrity welding, pressure vessel, hazardous-area electrical, nuclear-grade coatings, radiological QHSE, heavy fabrication, NDT and integrated project management.	GBE-Nuclear; Rolls-Royce SMR Derby; DESNZ Nuclear	★★★★
European Energy Indian Queens solar-BESS — Danske Bank £58.1m (12 Aug)	Approach European Energy UK, its solar EPC partner and Danske Bank UK on HV electrical, hazardous-area systems, civils, structural steel, coatings and QHSE. Cornwall solar-plus-BESS template for southern England.	European Energy UK; Danske Bank UK	★★★★
NextEnergy 107 MW / 151 MWh BESS portfolio (13 Aug)	Approach NextEnergy UK and preferred EPC on HV electrical, civils, structural steel, coatings and QHSE. 2026–27 commercial ops. Adds to widening BESS owner-operator engagement list.	NextEnergy UK	★★★
Track 1 CCS supply chain (HyNet + NEP)	Continue engagement with Saipem Aberdeen/London, Eni CCUS Holding, Wood/Petrofac/Worley on subsea pipeline, ROV, geotechnical, welding, coatings and marine coordination. Track 1 first CO_2 injection 2028.	Saipem UK; Eni CCUS Holding; Wood; Petrofac; Worley	★★★★
LDES Window 1 Scottish pumped storage	Continue multi-year framework engagement with SSE (Coire Glas), Statera (Loch Kemp), Gilkes (Earba) on HV electrical, mechanical fabrication, tunnelling, hydraulic, coatings and welding. 3,900 MW Scottish pumped storage anchor pipeline.	SSE Renewables; Statera Energy; Gilkes Energy	★★★★
LDES Window 1 Li-ion BESS (11 projects)	Engage Statera East Claydon and Sundon, Zenobe, Frontier and other minded-to Li-ion developers on HV electrical, hazardous-area systems, civils, structural steel, coatings and QHSE. National footprint.	Statera; Zenobe; Frontier; Modo Energy list	★★★
Floating Wind Conference (7–8 Oct)	Confirm attendance now. Pre-book meetings with Aker Solutions, Nadara, ScotWind developers (Green Volt, Cenos, MarramWind, Salamander, Bellrock). Finalise Squid, C-Dart, Krona pitch materials.	Aker Solutions; Nadara; ScotWind developers	★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
BP UKCS divestment supplier due-diligence	Engage BP Aberdeen procurement, Morgan Stanley and Rothschild advisers, and likely acquirer teams (Ithaca, EnQuest, Serica, Harbour) to secure contract continuity through H1 2027.	BP Aberdeen; Morgan Stanley; Rothschild; Ithaca; EnQuest; Serica; Harbour	★★★★
NI deep-geothermal (post-consultation)	Pre-position with NI stakeholders (DfE, NI Water, Belfast Council). Drilling, HV electrical, mechanical, welding, coatings and QHSE. Larne and Lough Neagh basins.	DfE NI; NI Water	★★
Marine & tidal (2027–28 demonstrator pipeline)	Keep on annual sales calendar. Mocean Energy Edinburgh, CorPower Ocean, EMEC Orkney priority engagement points. Floating platform, mooring, cabling, marine coordination.	Mocean Energy Edinburgh; CorPower; EMEC	★★

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