

UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 3 October 2026

Coverage Period	Audience	Classification
27 Sep – 3 Oct 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 3 October 2026 were shaped by Labour’s first conference under Prime Minister Andy Burnham (Liverpool, 27–30 September) and by a strong week for Montrose.

On 29 September Burnham announced Great British Grid, a new publicly owned branch of Great British Energy with £4 billion earmarked to co-invest in tendered transmission projects and speed up grid connections. He promised a “pragmatic” approach to the North Sea and an ambition to bring UK energy costs into line with European neighbours within ten years. Energy Secretary Miatta Fahnbulleh (28 September) focused on the cost of living, devolving the £15 billion Warm Homes Plan to mayors, but said nothing new on Rosebank, Jackdaw, the delayed Hydrogen Strategy or carbon capture policy. On 30 September MSPs voted 77–42 to leave the Jackdaw and Rosebank decisions to the UK Government, rejecting a Conservative motion to approve them immediately.

For North-east Scotland, the most concrete news came from Montrose on 28 September. SSE selected Montrose Port’s South Harbour as the preferred operations and maintenance base for the 1.4 GW Berwick Bank B offshore wind farm, which secured a 20-year CfD in January 2026 and expects final investment decision in 2027. The base is expected to create 100 operational jobs over a 35-plus-year life and around 30 construction jobs. On the same day Westhill-based Subsea Micropiles announced a £5 million-plus investment in a Montrose manufacturing facility for floating-wind mooring components, creating around 80 jobs, backed by £6.7 million from the Scottish National Investment Bank and £1.45 million from Scottish Enterprise. Against that, Audit Scotland reported on 1 October that the Scottish Government’s £500 million Offshore Wind Investment Programme has committed only £141 million across 17 projects, with most private investment tied to one project (the £350 million Port of Nigg subsea cable plant) and no plan beyond 2028/29.

Elsewhere: GB Energy widened its £300 million Supply Chain Fund for offshore wind and networks from 12 to 29 eligible components (guidance version 3, 1 October; applications close 10 December 2026). Serica Energy completed its £33 million net acquisition of Spirit Energy’s Southern North Sea assets, adding about 10,000 boe/d including a 15% stake in Cygnus (1 October). Hydrogen UK warned on 30 September that the industry could collapse without decisions by the end of 2026 on the Hydrogen Strategy, HAR2 winners and the hydrogen transport business model. Highland Council planners recommended no objection to the 2 GW Glen Earrach pumped-storage scheme at Loch Ness (30 September). Greenpeace threatened legal action against the Crown Estate over uncapped seabed lease fees for the Morgan re-tender, citing an Oxford Smith School study (1 October). The Ofgem price cap rose by about £60 to around £1,723 a year on 1 October, partly offset by a VAT cut on electricity bills worth around £45. For the week ahead, the key NES dates are: the RenewableUK Floating Offshore Wind Conference, Aberdeen, 7–8 October; the Holborn and St Pancras by-election, 8 October; the Flintshire Enfinium carbon capture planning decision, 7 October; and the Highland Council committee on Glen Earrach.

1. Offshore Wind — Fixed Bottom

SSE selects Montrose Port as O&M base for 1.4 GW Berwick Bank B (28 September 2026)

SSE Renewables has selected Montrose Port Authority as the preferred location for the operations and maintenance base for Berwick Bank B, the 1.4 GW first phase of its wider Berwick Bank wind farm off the East Lothian and Scottish Borders coast. Berwick Bank could reach up to 4.1 GW across three phases and up to 307 turbines. Berwick Bank B secured a 20-year Contracts for Difference contract in January 2026 and SSE expects to take a final investment decision in 2027. The O&M base is expected to create 100 full-time operational jobs over the wind farm's life of more than 35 years, plus around 30 jobs during construction of the base. It will occupy Montrose Port Authority's existing offices at Inchbraoch House, South Quay; the Port Authority team will move to the renovated Customs House on the north side of the port, whose ground floor will host a new Montrose Port Skills Academy developed with Angus Council and Dundee and Angus College. Montrose is already the O&M base for Seagreen (chosen in 2019). SSE separately announced 87 graduate hires across Scotland on 2 October.

NES Sales Opportunity: Montrose is becoming an O&M cluster for the outer Firth of Forth, with Seagreen already operating from the port and now Berwick Bank B. O&M work lasts 35 years and is mostly local: vessel crewing and chartering, port services, marine coordination, spares warehousing, turbine technicians, blade and electrical repair, inspection, ROV, cable survey, safety training and facilities management. NES Tier 2/3 firms should register interest with SSE Renewables' Berwick Bank team and Montrose Port Authority now, before FID in 2027, and plan for a physical presence or partner in Angus. Training providers should talk to the new Montrose Port Skills Academy.

Greenpeace threatens legal action over Crown Estate seabed fees for the Morgan re-tender (1 October 2026)

Greenpeace UK wrote to the Crown Estate on 1 October threatening legal action over uncapped option fees in seabed leasing, focusing on the 1.5 GW Morgan project in the Irish Sea, whose previous developers withdrew in January and for which the Crown Estate aims to choose a replacement before the end of 2026. Greenpeace argues the streamlined Morgan auction has the same legal defects as earlier rounds and wants the Chancellor to cap option fees, including in a sixth leasing round expected in the first half of 2027. It cites a University of Oxford Smith School study, *Headwinds: how seabed leasing risks adding costs to clean energy*, which estimates that option fees require developers to sell electricity at prices 30–59% higher and could cost consumers £36–72 billion between 2035 and 2054.

NES Sales Opportunity: A legal challenge could slow the Morgan re-tender, which the Morecambe and Morgan transmission consent (14 September) was meant to unlock. Keep Morgan in the pipeline but move it back by up to two quarters in sales forecasts until the Crown Estate responds. Any move to cap seabed fees in Round 6 would lower project costs and make more projects viable, which is good for supply-chain volume. This is a point to raise through RenewableUK and Scottish Renewables, where NES firms can argue that lower leasing costs should go into UK content.

2. Floating Offshore Wind

Subsea Micropiles invests £5m+ in Montrose floating-wind mooring component plant (28 September 2026)

Westhill-based Subsea Micropiles, a seabed imaging, anchor and foundations company with offices in Aberdeenshire and Ireland, announced on 28 September that it will invest more than £5 million over three years to expand manufacturing and offshore operations at Montrose Port, including a facility making mooring-system

components for floating wind turbines. The investment is expected to create around 80 jobs (Scottish Enterprise cites 81). Funding includes £6.7 million of commercial investment from the Scottish National Investment Bank and a £1.45 million Scottish Enterprise grant, both within the Scottish Government's £500 million commitment to offshore wind ports and supply chains. Chief executive Derek Robertson said the components will serve Scottish waters and international markets. First Minister John Swinney attended the announcement.

NES Sales Opportunity: This is a rare example of a North-east firm building floating-wind hardware locally, and it will need its own suppliers: steel stock and forgings, machining, fabrication, welding, coatings, NDT, lifting and load-testing, logistics and quayside handling. Montrose and Angus machine shops and fabricators should approach Subsea Micropiles now. It is also a useful template for other NES firms: a mooring or anchor product, a port location and combined SNIB and Scottish Enterprise funding.

Moray FLOW-Park sets out job numbers; GB Energy adds £1.3m to Pentland (30 September – 2 October 2026)

The developer of the proposed Moray FLOW-Park, a floating-foundation storage and marshalling site in the Moray Firth, said on 2 October that the project would directly create 83 full-time-equivalent jobs, and addressed local opposition and the project timeline. Great British Energy's first annual report (published 30 September) confirmed that its £5.8 million combined equity and loan investment in the 100 MW Pentland Floating Offshore Wind project (Highland Wind Limited, alongside the National Wealth Fund and the Scottish National Investment Bank) was followed by a further £1.3 million after the year-end. No new UK floating-wind CfD, consent or major contract award was published in the window. The RenewableUK Floating Offshore Wind Conference at P&J Live, Aberdeen, on 7–8 October is the next focal point.

NES Sales Opportunity: Floating wind needs quayside storage and marshalling before it needs anything else, so FLOW-Park and Ardersier are where early local work will appear: civil works, quay strengthening, ballast and mooring storage, crane and heavy-lift services, security and site services. NES firms should use the 7–8 October conference to meet FLOW-Park, Pentland (Highland Wind), BW Ideol / Ardersier, Salamander, Buchan and Green Volt teams, with specific offers rather than general capability decks.

3. Hydrogen

Hydrogen UK warns industry could fail without government decisions by end 2026 (30 September 2026)

Hydrogen UK chief executive Clare Jackson warned on 30 September that if the UK hydrogen industry "falls over" it will be because of government delay, not technology. She said that without decisions by the end of 2026 investors would leave and little industry might remain in 2027. The Department for Energy Security and Net Zero has not published the delayed Hydrogen Strategy, HAR2 shortlisted projects are still waiting for decisions, and the Hydrogen Transport Business Model is pending. Jackson pointed to bp dropping H2Teesside, the end of the Aberdeen Hydrogen Hub partnership with Aberdeen City Council, and ScottishPower's withdrawal from the HAR1 Cromarty and Whitelee projects (Storegga is now sole developer at Cromarty). She urged ministers to name HAR2 winners, including Uniper's 102 MW Humber H2ub. The Energy Secretary's conference speech on 28 September made no announcement on hydrogen.

NES Sales Opportunity: Treat UK hydrogen as a 2027 market at the earliest. NES firms should not build capacity ahead of HAR2 decisions, but should keep relationships live with the developers most likely to proceed (Storegga at Cromarty, Uniper in the Humber, ITM Power as a supplier to two HAR2 projects). Electrolyser balance-of-plant, hazardous-area electrical, compression, high-pressure piping and controls

skills transfer directly from oil and gas, so present them as low-risk options for developers once decisions land. The Autumn Budget on 28 October is the next possible point for news.

4. CCUS

£200m Enfinium Parc Adfer carbon capture plant recommended for approval — HyNet (2 October 2026)

Flintshire County Council planning officers have recommended approval of Enfinium's proposed £200 million carbon capture extension at its Parc Adfer energy-from-waste plant at Deeside Industrial Park, Connah's Quay. The extension would process 232,000 tonnes of residual waste a year and capture 241,000 tonnes of CO₂, around 95% of the carbon in the process. Captured CO₂ would enter the HyNet pipeline to Point of Ayr and be stored in depleted gas fields beneath the Irish Sea. No statutory objections were reported; the planning committee was due to decide on 7 October, with operations to end by 31 December 2050. Separately, Spirit Energy confirmed on 1 October that, after selling its remaining Southern North Sea production assets to Serica, it will focus on the Morecambe Hub and its Morecambe Net Zero carbon storage project. The Energy Secretary gave no indication of future CCS policy at conference.

NES Sales Opportunity: Waste-to-energy carbon capture is one of the more bankable CCS segments because the plants already exist and have steady emissions. HyNet and the Irish Sea stores are the nearest live CCS market, and Morecambe Net Zero is an Irish Sea storage project with an Aberdeen-connected operator. NES firms with CO₂-compatible process piping, compression, instrumentation, absorber and column fabrication, well conversion and offshore store monitoring should target Enfinium's EPC contractor once appointed, HyNet partners and Spirit Energy's Morecambe Net Zero team. In Scotland, Acorn still depends on a Track 2 funding decision, which may come with the Budget.

5. Marine & Tidal

No new UK tidal-stream or wave award this week — AR8 Pot 4 remains the trigger

No new UK tidal-stream or wave energy contract, consent or funding award was published in the 27 September – 3 October 2026 window. MeyGen in the Pentland Firth (SAE Renewables) continues to operate as the UK's largest tidal-stream array, Orbital Marine Power and Nova Innovation continue their programmes in Orkney and Shetland, and the Wave Energy Scotland 2025–27 programme continues. The main commercial trigger for the sector remains the AR8 Pot 4 (marine energy) result. Carbon Brief's analysis of 30 September, that record UK wind and solar output has avoided £5.9 billion of gas imports since the start of the Middle East crisis, adds to the case for predictable renewables, which tidal developers use to argue for continued ring-fenced support.

NES Sales Opportunity: Tidal and wave are small but steady markets that use the same subsea, mooring, cable, hydraulics and marine-operations skills as oil and gas and floating wind. NES firms should keep accounts open with SAE Renewables (MeyGen), Orbital Marine Power, Nova Innovation, EMEC and Wave Energy Scotland, and be ready to quote quickly once AR8 Pot 4 results confirm which projects move to procurement.

6. Geothermal

GEL to build £43m geothermal lithium plant at United Downs, Cornwall (29 September 2026)

Geothermal Engineering Ltd (GEL) announced plans on 29 September to build a larger lithium extraction facility at its United Downs site near Redruth, Cornwall, using brine from its existing deep geothermal wells. GEL will invest about £43 million, facilitated by an Offer in Principle worth nearly £10 million from the UK Government's DRIVE35 Automotive Transformation Fund. The plant should start commercial operation by 2029, producing around 1,500 tonnes a year of technical-grade lithium carbonate, enough for about 180,000 typical EV batteries, up from 100 tonnes a year at the current demonstration plant. GEL has produced lithium carbonate from geothermal brine at more than 99.3% purity. The project is expected to create nearly 50 direct jobs and support around 80 more in the supply chain. CEO Dr Ryan Law said it would show Cornwall's geothermal brine as a reliable source of UK lithium.

NES Sales Opportunity: Combining geothermal power, heat and lithium improves project economics and makes more UK deep geothermal wells worth drilling. The work is well-based: brine handling, corrosion-resistant piping, pumps, process skids, wellhead maintenance and well integrity, all familiar to North Sea firms. NES wells, process-engineering and corrosion specialists should approach GEL directly, and treat Cornwall as a niche diversification market worth one or two targeted bids.

7. Decommissioning

Serica completes Spirit Energy Southern North Sea deal; Spirit keeps most decommissioning liability (1 October 2026)

Serica Energy completed its acquisition of Spirit Energy's remaining Southern North Sea production assets on 1 October for a net payment of \$43 million (£33 million), comprising \$75 million (£57 million) upfront less cash flows since the effective date of 1 January 2025. The portfolio adds about 10,000 boe/d of production, 18.7 million boe of proved and probable reserves and 3.4 million boe of 2C resources. It includes a 15% non-operated interest in the Ithaca Energy-operated Cygnus gas field, a 25% non-operated interest in Clipper South and operated positions in the Greater Markham Area, and will be reported as Serica's Southern North Sea Hub. The assets are forecast to generate more than \$200 million of free cash flow by end 2028, more than double the expectation when the deal was announced in December 2025. Spirit Energy (Centrica) retains decommissioning liabilities associated with the operated assets, expected to be more than 75% of the portfolio's total. Spirit will employ around 50 people in Aberdeen after earlier cuts; Serica is taking on some Spirit staff, including about 100 from Hoofddorp.

NES Sales Opportunity: Late-life asset transfers like this usually mean a new operator running fields harder for cash, followed by a decommissioning programme funded mostly by the seller. NES firms should approach Serica for late-life operations, integrity and maintenance work on the new Southern North Sea Hub, and Spirit/Centrica for the decommissioning planning, well P&A and removal scopes it keeps. Cygnus (Ithaca) remains one of the UKCS's largest gas fields and a long-life customer.

North Sea Futures board urged to deliver a visible project pipeline for the supply chain (1 October 2026)

Peterson Energies chief executive Sarah Moore urged industry on 1 October to support the North Sea Futures board, set up by former Energy Secretary Ed Miliband and chaired by Energy Minister Michael Shanks, saying it must move from ambition to action rather than become an "echo chamber". The 18-member board has met three times since January and oversees the North Sea Future Plan, which proposed transition energy certificates to let operators develop tiebacks to existing fields; Energy Voice reports the related legislation has stalled since the change of Prime Minister. Moore said the board is working to make the project pipeline more credible and visible so supply-chain businesses can plan investment.

NES Sales Opportunity: A published, credible pipeline of tiebacks, life extensions and decommissioning campaigns is the single most useful thing government could give NES Tier 2/3 firms for planning. Feed specific evidence (order book gaps, capacity at risk, lead times) to the board through OEUK, AGCC or ETZ, and watch for transition energy certificate rules, which would open tieback work on existing hubs.

8. Hydropower & Pumped Storage

Highland Council planners back 2 GW Glen Earrach pumped-storage scheme at Loch Ness (30 September 2026)

Highland Council planning officials have recommended that councillors raise no objection to the Glen Earrach Pumped Storage Hydro scheme, with the south planning applications committee due to debate it the following week as a consultee to the Scottish Government. Glen Earrach Energy says the 2 GW scheme would be among the UK's largest and most water-efficient storage projects, using Loch nam Breac Dearga above Drumnadrochit as the upper reservoir and Loch Ness as the lower reservoir. The UK has four pumped-storage stations (Cruachan and Foyers in Scotland, Dinorwig and Ffestiniog in Wales) and no large scheme has been built for about 40 years. Ofgem's final Long Duration Electricity Storage Window 1 cap-and-floor decisions, covering Coire Glas, Loch Kemp and Earba among others, are still expected this autumn.

NES Sales Opportunity: Glen Earrach, Coire Glas, Loch Kemp and Earba together form a Highland pumped-storage pipeline of more than 5 GW, with tunnelling, underground caverns, penstocks, turbines and HV connections that will run for years. NES firms in tunnelling support, heavy civils, steel fabrication, mechanical and electrical installation, ventilation, plant hire and site services should track the Highland Council decision and Ofgem's Window 1 awards, and approach Glen Earrach Energy early about pre-construction surveys and site works.

9. Policy

Burnham launches Great British Grid with £4bn; promises North Sea “pragmatism” (29 September 2026)

In his first conference speech as Prime Minister on 29 September, Andy Burnham announced Great British Grid, a publicly owned branch of Great British Energy that will co-invest in tendered transmission projects alongside private businesses and compete with the existing private network owners to cut costs and speed up connections. £4 billion is earmarked, with start-up costs from GB Energy's existing budget and the wider budget to be set in a future spending review. DESNZ said GB Grid will complement existing institutions; the roles of network operators, Ofgem and NESO are unchanged. Ofgem estimates £70 billion of grid investment is needed between 2025 and 2031; Energy UK said transmission owners plan to spend £90 billion over five years. Burnham also promised a national energy plan, a “massive expansion” of renewables and nuclear, decoupling electricity prices from gas, and a “pragmatic” approach to North Sea oil and gas. Aberdeen & Grampian Chamber of Commerce chief executive Russell Borthwick questioned the £4 billion, warning it could take support away from floating wind and UK supply chains. OEUK said more than 100 licensed projects are ready if the tax regime and regulation allow.

NES Sales Opportunity: GB Grid sits within GB Energy, which is headquartered in Aberdeen, and will put public money into competitively tendered transmission, which means more onshore and offshore HV projects and possibly a buyer more open to UK content. NES HV electrical, substation, cable installation, civil and protective-coatings firms should get on GB Energy's radar now and track how GB Grid tenders are designed. The North Sea “pragmatism” line has no detail yet; the 28 October Budget (EPL timing) and the Jackdaw/Rosebank decisions are where it will show.

Audit Scotland: £500m Offshore Wind Investment Programme slow and at risk (1 October 2026)

Audit Scotland reported on 1 October that the Scottish Government's five-year £500 million Offshore Wind Investment Programme (OWIP), launched in 2023 to support ScotWind supply-chain infrastructure and manufacturing, is making slow progress. £141 million has been committed across 17 projects; £413 million of private investment has been secured, broadly meeting the target of £3 private for every £1 public, but most of it relates to one project: the £350 million subsea cable plant at the Port of Nigg, which received £24.5 million of public funding. Audit Scotland cited reduced investor confidence, regulatory issues, an early data breach that weakened work with delivery partners (the Scottish National Investment Bank, Highlands and Islands Enterprise and Scottish Enterprise), weak monitoring and risk management, a reliance on grants over loans or equity, and no clear plan after 2028/29. Auditor General Stephen Boyle called for stronger governance. Scottish Energy Minister Stephen Gethins said some recommendations had already been implemented.

NES Sales Opportunity: OWIP still has more than £350 million uncommitted, and pressure from Audit Scotland makes the government more likely to speed up awards. NES firms with credible manufacturing or port investment plans should approach Scottish Enterprise, HIE or SNIB now, using the Subsea Micropiles model. Expect more loans and equity and fewer pure grants, so prepare business cases that show repayment capacity and private co-investment.

Holyrood leaves Jackdaw and Rosebank to UK Government; Fahnbulleh silent at conference (28–30 September 2026)

On 30 September MSPs voted 77–42 for a Labour amendment noting that decisions on Jackdaw and Rosebank are for the UK Government, rejecting a Scottish Conservative motion calling for immediate approval; the Conservatives cited 3,500 jobs and £30 billion of economic value. At Labour conference on 28 September, Energy Secretary Miatta Fahnbulleh made no statement on the two fields, now operated by Adura (Shell / Equinor). City AM reports the fields could produce nearly one billion barrels and meet more than 6% of UK gas demand. Energy Minister Michael Shanks has said the decision will come “as soon as we can”; the 8 October Holborn and St Pancras by-election and the 28 October Budget remain the likely timing markers. Chris Stark, head of the DESNZ Clean Power mission control, announced his departure after two years (1 October).

NES Sales Opportunity: No change for sales planning: do not expect Jackdaw or Rosebank work before late 2026. Keep pricing and capability current with Adura, Ithaca Energy and their main contractors. The Clean Power mission control leadership change is worth watching for any slowdown in grid and consenting work that NES firms depend on.

Price cap rises £60 as VAT cut on electricity takes effect; GB Energy widens Supply Chain Fund (1–2 October 2026)

The Ofgem price cap rose on 1 October by about £60 to around £1,723 a year for a typical household, while a VAT cut on electricity bills announced by the Prime Minister, worth about £45 a year, took effect the same day. Carbon Brief reported that typical household gas bills rose about 33% from April. On 1–2 October GB Energy published version 3 of the guidance for its £300 million Supply Chain Fund: Offshore Wind and Networks, expanding the eligible component list from 12 to 29 (network components must be 132 kV or above). Applications close on 10 December 2026, or earlier if funds run out; average grant intensity is expected to be around 15%, with grants drawn down between April 2026 and March 2030. GB Energy's first annual report (30 September) said first payments are expected in 2026/27.

NES Sales Opportunity: The wider component list is the most practical news of the week for NES manufacturers. Check the 29 components against your product range now: if you make or could make a listed component, the fund can cover a share (about 15% on average) of capex for new or expanded UK

manufacturing. Applications close 10 December, but money is allocated in rounds, so apply early. Rising gas bills strengthen the political case for wind and grid build-out, which supports long-term order volume.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
Week of 5 Oct 2026	Highland Council south planning committee: Glen Earrach 2 GW pumped storage	Inverness	Pumped-storage pipeline
7 Oct 2026	Flintshire planning committee: Enfinium Parc Adfer £200m carbon capture	Flintshire, Wales	HyNet CCS supply chain
7–8 Oct 2026	RenewableUK Floating Offshore Wind Conference	P&J Live, Aberdeen	Floating wind sales window
8 Oct 2026	Holborn & St Pancras by-election	London	Jackdaw / Rosebank timing
15–16 Oct 2026	Offshore Wind North East Conference	Newcastle	NES cross-border engagement
22–23 Oct 2026	Rolls-Royce SMR / GBE-N supplier conference (Gwyndod)	Ynys Môn, Wales	SMR supply chain
28 Oct 2026	Autumn Budget 2026	Westminster	EPL timing, hydrogen, CCUS, GB Grid
4–5 Nov 2026	Global Offshore Wind Investment Forum	London	Developer and investor access
Late Nov 2026	AR8 CfD Contract Budget Notice (DESNZ)	National	Pot 1/2/3 budget release
Autumn 2026	Ofgem LDES Window 1 cap-and-floor decisions	National	Coire Glas, Loch Kemp, Earba
10 Dec 2026	GB Energy Supply Chain Fund: final application close	National	Manufacturing capex grants
End 2026	Crown Estate Morgan re-tender preferred bidder (subject to Greenpeace challenge)	Irish Sea	Transmission and array scope
End 2026	Inch Cape first power	Firth of Forth	Commissioning and O&M
2027	Berwick Bank B final investment decision	Montrose / East Lothian	Construction and O&M
H1 2027	Crown Estate leasing Round 6 (expected)	England and Wales	Future project pipeline

11. Grant Funding & Support Mechanisms Active This Week

Mechanism	Amount / Scope	Deadline	Relevance to NES
GB Energy Supply Chain Fund: Offshore Wind and Networks	£300m capex grants; 29 eligible components (up from 12)	Closes 10 Dec 2026 (or earlier)	Manufacturing investment, ~15% grant intensity
Scottish Government Offshore Wind Investment Programme (OWIP)	£500m; £141m committed to date	Rolling to 2028/29	Port and manufacturing projects via SE, HIE, SNIB
Scottish National Investment Bank	Commercial investment (e.g. £6.7m Subsea Micropiles)	Rolling	Loans and equity for growth capex
Scottish Enterprise capital grants	e.g. £1.45m Subsea Micropiles	Rolling	Job-creating NES investment
Great British Grid (new)	£4bn earmarked	Design to follow	Transmission co-investment
GB Energy Energy Engineered in the UK	£1bn three-pillar supply chain programme	Rolling	Grants and strategic investment in Tier 1–3
DRIVE35 Automotive Transformation Fund	e.g. ~£10m offer to GEL lithium	Rolling	Geothermal lithium and battery materials
Warm Homes Plan (devolved to mayors)	£15bn to 2030	Rolling	Heat pumps, insulation, building services
HAR2 electrolytic hydrogen (DESNZ)	Shortlist awaiting decision	Pending	Electrolyser balance-of-plant
CCUS Track 1 / Track 2	Revenue support and FID gates	Budget 28 Oct signal	HyNet, NEP, Acorn, Viking
Ofgem LDES Cap-and-Floor Window 1	16 projects minded-to	Autumn 2026 decisions	Pumped storage and batteries
Wave Energy Scotland	2025–27 programme	Rolling	Marine and tidal supply chain

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
Berwick Bank B O&M base, Montrose (28 Sep)	SSE 1.4 GW, CfD secured, FID 2027. 100 operational jobs for 35+ years, 30 construction jobs. Vessels, port services, technicians, spares, inspection, training.	★★★★★	Register before FID 2027
Subsea Micropiles Montrose plant (28 Sep)	£5m+ investment, ~80 jobs, floating-wind mooring components. Steel, forgings, machining, fabrication, coatings, NDT, handling.	★★★★★	Now
GB Energy Supply Chain Fund (29 components)	£300m capex grants, list widened from 12 to 29 components; ~15% average grant. Applications close 10 Dec 2026.	★★★★★	Apply early, by 10 Dec

Opportunity	Details	Rating	Action Window
Floating Offshore Wind Conference, Aberdeen (7–8 Oct)	FLOW-Park, Pentland, BW Ideol / Ardersier, Salamander, Buchan, Green Volt teams. Bring specific offers.	★★★★★	Book meetings now
OWIP uncommitted funds (£350m+)	Audit Scotland pressure to speed up awards. Port and manufacturing investment via SE, HIE, SNIB; expect more loans and equity.	★★★★★	Q4 2026 – 2027
Great British Grid (£4bn)	Public co-investment in tendered transmission; branch of GB Energy (Aberdeen HQ). HV, substations, cable install, civils.	★★★★★	Track tender design
Serica Southern North Sea Hub (1 Oct)	~10,000 boe/d added incl. 15% Cygnus, 25% Clipper South, Greater Markham operated assets. Late-life operations and integrity.	★★★★★	Q4 2026
Spirit / Centrica retained decommissioning	Spirit keeps >75% of decommissioning liability on transferred operated assets; also Morecambe Net Zero CCS.	★★★★★	2027 onwards
Glen Earrach 2 GW pumped storage	Planners recommend no objection; committee next week. Tunnelling, caverns, civils, M&E, HV.	★★★★★	After consent
Ofgem LDES Window 1 (Coire Glas, Loch Kemp, Earba)	Highland pumped-storage pipeline above 5 GW with Glen Earrach. Awaiting autumn decisions.	★★★★★	Autumn decisions
Moray FLOW-Park	83 FTE floating-foundation storage and marshalling site; local opposition. Civils, quay works, heavy lift, site services.	★★★	Pre-consent
Enfinium Parc Adfer CCS (HyNet)	£200m, 241,000 t CO ₂ /yr; decision 7 Oct. Process piping, compression, instrumentation, columns.	★★★	After 7 Oct decision
GEL geothermal lithium, United Downs	£43m plant, 1,500 t/yr lithium carbonate by 2029. Brine handling, corrosion-resistant piping, wells.	★★★	2027 – 2029
Morgan re-tender (Irish Sea 1.5 GW)	Preferred bidder planned end 2026; Greenpeace legal threat could delay. Transmission DCO in place.	★★★	Hold, review Q1 2027
Jackdaw / Rosebank (Adura)	Holyrood defers to UK Government; decision timing tied to by-election and Budget. Subsea, topsides, vessels.	★★★	Late 2026 onwards
HAR2 hydrogen projects	Industry warns of collapse without decisions by end 2026. Storegga Cromarty, Uniper Humber H2ub, ITM Power.	★★	2027
Tidal and wave (AR8 Pot 4)	No new awards this week. SAE (MeyGen), Orbital, Nova, EMEC, Wave Energy Scotland.	★★	After AR8 results

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- [15] [Energy Voice — North Sea Futures board 'not an echo chamber' \(1 Oct 2026\)](#)
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- [17] [Solar Power Portal — Andy Burnham launches Great British Grid company to speed connections \(29 Sep 2026\)](#)
- [18] [BBC News — Andy Burnham says public body will invest in electricity grid \(29 Sep 2026\)](#)
- [19] [Energy-Pedia — Burnham promises North Sea pragmatism as Chamber questions £4bn grid plan \(30 Sep 2026\)](#)
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- [21] [City AM — Burnham's North Sea 'pragmatism' vow leaves energy industry hopeful \(1 Oct 2026\)](#)
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