

INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 25 April 2026

Prepared by ExportCentral AI – North East Energy Supply Sector Space

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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, decommissioning and other offshore renewables.

Executive Summary

This was a high-signal week for the UK offshore low-carbon sector. The most significant development for NES supply chain companies is Nadara’s formal submission of consent applications for the **1.8 GW Bellrock floating offshore wind project** – located just 120 km east of Stonehaven – representing the largest ScotWind floating wind project yet to enter the consent pipeline.

Simultaneously, a landmark report by Redwater Insights has ignited a major debate, revealing that urgent North Sea decommissioning action could create up to **25,000 UK jobs** and deliver **£15 billion** in economic benefit – with Aberdeen, East Anglia, Teesside and Tyneside named as primary beneficiaries.

In the CfD/policy arena, the UK government published its CCUS Future Network Strategy consultation summary, revealing strong industry consensus on carbon pricing and regulatory certainty, while the ECC NPT Pathfinder CCUS selection process progressed with engagement events confirmed for early May. WindEurope’s Annual Event in Madrid (21–23 April) consolidated North Sea energy ministers’ commitment to offshore wind expansion under the Hamburg Declaration.

1. Offshore Wind – Fixed Bottom

East Anglia THREE: UK Record Turbine Installation

ScottishPower and Masdar have installed the first turbine at the \$5.4 billion East Anglia THREE offshore wind farm, setting a new UK record with **115-metre rotor blades** – the longest ever manufactured and deployed in the UK. Each blade exceeds the length of a Premier League football pitch, and the 95 Siemens Gamesa 14 MW turbines will stand 262 metres tall – higher than the observation deck at The Shard. The project, located approximately 69 km off the east coast of England in the southern North Sea, carries a total capacity of **1.4 GW** and is scheduled for full operation by end of 2026. All 285 blades are being manufactured at Siemens Gamesa’s factory in Hull, underscoring the domestic supply chain dimension.

NES Sales Opportunity: Offshore services companies, marine logistics specialists, installation vessel operators and O&M contractors should be actively scoping East Anglia THREE subcontracts. With commissioning imminent, early operational phase contracts — covering inspection, maintenance, cable management and environmental monitoring — represent near-term revenue opportunities.

Crown Estate Leasing Round 6: North East England Focus

The Crown Estate's planned Offshore Wind Leasing Round 6, targeted for launch in the first half of 2027, has entered a market engagement phase. The round is expected to accommodate around **6 GW or more** of new capacity, predominantly off the coast of North East England in water depths suited to fixed-bottom foundations. The Crown Estate estimates this could create up to **10,000 direct jobs** and deliver over **£12 billion** in economic value. Market engagement is now underway to refine site locations, tender formats and commercial models.

NES Sales Opportunity: NES companies with experience in fixed-bottom foundation fabrication, monopile design, subsea cable installation, offshore logistics, environmental impact consultancy and marine survey have a direct pipeline opportunity here. The North East of England location creates natural co-investment possibilities for Scottish companies with East Coast UK partnerships.

OEUK Wind Insight 2026 — Aberdeen Briefing (6 May)

Offshore Energies UK (OEUK) will host its Wind Insight 2026 breakfast briefing at P&J Live Aberdeen on **6 May**, launching its Wind Insight 2026 report and updated UK Offshore Wind Farm Development Processes Guidelines. The event, sponsored by Deloitte, is framed as a “reality check” on investment, infrastructure and policy signals shaping the sector. Discussions will focus on grid access, curtailment, long-term price certainty and whether current policy frameworks are sufficient to unlock delivery at scale.

NES Sales Opportunity: Attending this event is strongly recommended. It will provide early insight into the updated development pipeline, grid constraints and procurement opportunities ahead of AR8 — directly informing business development planning for NES supply chain firms.

UK Government Removes Offshore Wind Component Tariffs

From **1 April 2026**, the UK Government removed tariffs on 33 industrial goods related to offshore wind energy components, saving manufacturers millions of pounds annually. This is part of the government's Clean Energy Superpower mission and will reduce input costs for supply chain companies manufacturing or sourcing components in the UK.

NES Sales Opportunity: NES companies that manufacture or import sub-components (cable accessories, structural steel components, mechanical parts, composite materials) should immediately review their tariff classification to capture savings and improve price competitiveness in tender submissions.

2. Floating Offshore Wind

Bellrock 1.8 GW Consent Application — ScotWind Milestone

The week's most important development for NES companies is Nadara's formal submission of **Section 36 consent and Marine Licence applications** to Scottish Ministers for the Bellrock floating offshore wind farm, located 120 km east of Stonehaven in the central North Sea. At **1.8 GW**, Bellrock would be one of the largest floating wind projects in UK waters, featuring up to **132 floating turbines**, 300 km of inter-array cables, grid connection to SSEN's proposed Hurlie substation near Stonehaven, and construction planned from 2031 with commercial operations in 2037. The Scottish Government will now review applications; firm grid connection dates from NESO are expected by early 2027 via the Connections Reform process.

NES Sales Opportunity: This is a direct, high-value opportunity for NES companies. Bellrock's proximity to Stonehaven means Aberdeen-area port and logistics infrastructure, subsea engineering firms, marine survey specialists, environmental services companies, and offshore installation contractors should begin building supply chain relationships with Nadara now — well in advance of FEED and EPC procurement phases commencing around 2029–2030.

UK Has 20 FLOW Projects Worth Over \$55 Billion

Industry data confirms the UK leads Europe in floating offshore wind, with **20 floating wind farm projects** in UK waters representing more than **\$55 billion** in investment. Key ScotWind floating wind projects now moving through the consent pipeline alongside Bellrock include ScottishPower Renewables' 3 GW MarramWind and Thistle Wind Partners' Ayre project. The ScotWind leasing round awarded seabed rights totalling approximately **19.2 GW** of floating wind capacity across 20 projects, with 14 planned as floating farms.

NES Sales Opportunity: The collective scale of ScotWind's floating wind pipeline represents a generational supply chain opportunity. NES companies should map their capabilities against FEED-stage requirements for mooring systems, dynamic cables, floating substructures, corrosion protection, remote monitoring and integrated O&M solutions.

Port Talbot £64m Floating Wind Hub

The UK Government confirmed a **£64 million** investment in Associated British Ports' Future Port Talbot programme, positioning the Welsh port as a hub for Celtic Sea floating wind manufacturing, assembly and integration. The infrastructure is projected to support at least **4.5 GW** of floating wind capacity in the Celtic Sea. While primarily targeting southern UK projects, this confirms the national commitment to building floating wind port infrastructure and validates parallel Scottish efforts at Cromarty Firth, Kishorn and Ardersier.

3. Hydrogen

UK Hydrogen Barriers Analysis — Key Bottleneck Identified

An important analysis published **23 April 2026** by Xoserve ahead of the anticipated spring publication of the updated UK Hydrogen Strategy highlights that **demand creation** is now the single biggest constraint on UK hydrogen growth. Over **81%** of organisations seeking offtakers report difficulty securing hydrogen offtake agreements, and **60%** of potential end-users find integrating hydrogen into operations challenging. Contracts under HAR1 have now been signed, providing revenue support for a first wave of electrolytic hydrogen projects including Cromarty Hydrogen in Scotland. The HAR2 shortlist currently totals around **765 MW**, though shortlisted status does not guarantee support, with decisions expected by mid-2026.

NES Sales Opportunity: Companies with electrolyser integration, hydrogen storage, compression, or purification capabilities should engage directly with HAR-contracted projects. Cromarty Hydrogen, as a specifically named Scottish project, represents a near-term local opportunity. Engineering firms with process design skills can target the growing pipeline of hydrogen production plant projects now moving through development.

Humber Hydrogen Network — £500m Consortium Bid

A consortium of **National Gas, Centrica, Equinor and SSE Thermal** is seeking approximately **£500 million** in government funding to develop the UK's first regional hydrogen transport and storage network in the Humber region, linking Aldb Hydrogen, H2H Saltend and Keadby Next Generation Power Station. The government confirmed over £500 million for hydrogen infrastructure in its Industrial Strategy, with the first Hydrogen Transport and Storage allocation rounds targeted for launch in 2026.

NES Sales Opportunity: The Humber network will require specialised pipeline engineering, compression stations, safety systems and monitoring equipment — all areas where NES oil and gas competencies translate directly. Companies should track procurement activity from the consortium participants and position early.

US Policy Shift on Hydrogen — Global Market Signal

Approximately **\$5 billion** in US funding for five regional hydrogen hubs is expected to remain in place despite earlier uncertainty, with industry-linked and gas-based projects in Texas, Appalachia and the Midwest benefiting most. Globally, 2026 is seen as a pivotal year with first final investment decisions anticipated for several major hydrogen and ammonia projects. This is creating international project flow — including a 275 MW electrolyser order secured by Plug Power for Hy2gen's "Courant" project in Canada to produce low-carbon ammonia for the mining industry.

4. Carbon Capture, Utilisation & Storage (CCUS)

CCUS Future Network Strategy – Consultation Response Published

The UK Government published its summary of responses to the CCUS Future Network Strategy call for evidence this week (**21 April 2026**). Industry consensus is clear: a stable carbon price and regulatory certainty are vital for a self-sustaining CCUS market, with most respondents urging effective UK–EU ETS linkage and a Carbon Border Adjustment Mechanism (CBAM). Flexible support mechanisms, longer-term contracts and cross-party agreement on policy direction are widely viewed as essential to unlock investment. The government also confirmed this week that **Carbon Price Support (CPS)** – the tax on fossil fuels used in electricity generation – will be removed from **April 2028**, with clean power incentives now deemed sufficient.

NES Sales Opportunity: The movement toward a self-sustaining commercial CCUS sector – backed by regulatory reform – signals growing long-term project flow. NES companies with subsea pipeline engineering, compression, well integrity, CO₂ monitoring or marine survey capabilities have highly transferable skills for CCUS project delivery.

ECC NPT Pathfinder Selection Process – Active Procurement

The Department for Energy Security and Net Zero (DESNZ) has confirmed the East Coast Cluster (ECC) Non-Pipeline Transport (NPT) Pathfinder selection process, targeting CCUS projects seeking connection to the ECC Teesside network by 2032. An engagement session is scheduled for the week commencing **4 May 2026**, with Expressions of Interest due by **11:59pm on 12 May 2026**, and full application submissions closing **12 June 2026**. Projects awarded through this process will access remaining storage capacity at the Endurance offshore site in the Southern North Sea.

NES Sales Opportunity: Urgent action required. NES companies involved in offshore CO₂ injection, well services, subsea infrastructure or CCUS engineering should immediately assess whether they can support ECC-connected projects as supply chain partners. The 12 May EOI deadline is imminent.

OEUK North Sea CCS & Hydrogen Summit – Edinburgh, 1–2 June

OEUK will host its inaugural North Sea CCS & Hydrogen Summit 2026 at the Sheraton Grand Hotel in Edinburgh on **1–2 June**. The event will provide live updates on emerging CCS and hydrogen projects, insights on regulatory change and discussions on shared infrastructure and cross-border collaboration. This is a direct business development event for NES supply chain firms active in CCS and hydrogen.

IEA: Global CCUS Capacity Up 10% Year-on-Year

The IEA's newest annual CCUS Project Database update found that capture capacity operational or under construction grew **over 10% year-on-year** through Q1 2026. In the UK, remaining Track-1 capture projects are expected to progress toward construction in 2026, while the Porthos project in the Netherlands is set to begin operations as Europe's second large-scale CO₂ transport and storage network.

5. Marine & Tidal Energy

WindEurope Madrid: Tidal Stream Confirmed in UK–France Collaboration

At WindEurope 2026 in Madrid (**21–23 April**), energy ministers from North Sea countries convened to accelerate implementation of the Hamburg Declaration on offshore wind. The UK and France have confirmed plans to install at least **400 MW** of tidal stream capacity over the next decade. The UK currently has 10 MW of tidal stream capacity deployed, with a further **120 MW** to be deployed by 2028 through three consecutive CfD ringfences.

EMEC Expansion — £15m Blue Horizon Investment

Earlier this year, a **£15 million** investment was awarded to the European Marine Energy Centre (EMEC) in Orkney as part of UKRI's £38 billion funding settlement. The Blue Horizon project will expand EMEC's tidal test facilities to enable array demonstrations, moving the sector from single-device trials toward multi-device commercial-scale deployments — a critical inflection point for supply chain engagement.

NES Sales Opportunity: EMEC's expansion creates immediate opportunities for NES companies in subsea cabling, marine installation, mooring system supply, underwater NDT, environmental monitoring and remote sensing. The Orkney location offers proximity advantages for Aberdeen-based logistics and offshore services firms.

Hybrid Wind–Tidal–Wave Platforms — Emerging Technology Trend

Research published in February 2026 confirmed that combining floating wind turbines with wave, solar and tidal devices on shared platforms reduces construction costs, improves platform stability and reduces unwanted motion by **15%**. This convergence trend creates new product and engineering opportunities for NES companies that can offer multi-technology integration expertise — a direct extension of offshore oil and gas platform engineering experience.

6. Decommissioning

Landmark Report: North Sea Decommissioning Could Create 25,000 UK Jobs

The week's most commercially significant report for NES companies was published by **Redwater Insights on 23–24 April 2026**: urgent action to enforce oil and gas decommissioning obligations could create up to **25,000 UK jobs** (11,000 direct, 13,500 indirect, plus 6,000 flow-on roles) and deliver **£15 billion** in economic benefit. The report found that **500 North Sea wells are currently overdue** for plugging and abandonment, with a further **1,700 expected to reach end-of-life within six years**. It recommends that the North Sea Transition Authority (NSTA) be granted increased powers to impose binding decommissioning deadlines on operators, and that UK supply chain support be actively enabled.

The report specifically identifies **Aberdeen, East Anglia, Teesside and Tyneside** as primary job creation locations, and highlights decommissioning as a critical skills bridge for 15,000 workers facing a cliff-edge of unemployment as production declines. Forecasted decommissioning spend from 2025 onwards stands at **£44 billion** (2024 prices), with well decommissioning being the most expensive component at £17.5 billion, covering 3,277 wells up to 2060.

NES Sales Opportunity: This is an immediate, high-value market for NES companies. Well plugging and abandonment (P&A), topsides removal, pipeline decommissioning, waste management,

recycling, subsea infrastructure removal, marine environmental services and logistics all represent direct revenue streams. NES firms should monitor NSTA enforcement activity and operator decommissioning programme submissions closely. The OPRED Decommissioning Guidance updated **16 April 2026** sets out the current regulatory framework.

SPE Aberdeen Well Decommissioning 2026 — 3–4 June, P&J Live

The leading conference for the decommissioning sector will be held at P&J Live Aberdeen on **3–4 June 2026**. Given the Redwater Insights report's timing, this event is expected to feature significant discussion on regulatory enforcement, commercial frameworks and supply chain readiness.

7. Hydropower & Pumped Storage

Coire Glas FID Decision Imminent

SSE Renewables' Coire Glas pumped storage hydro project on Loch Lochy — the UK's first large-scale pumped storage development in over 40 years — is approaching a **Final Investment Decision**, pending the successful securing of a Cap and Floor agreement. With a planned capacity of up to **1,300 MW** and **30 GWh** of energy storage, Coire Glas would more than double Great Britain's existing electricity storage capacity, with a grid connection date of **October 2029** confirmed by SSEN Transmission. The project has received Gold Hydropower Sustainability Standard certification — the first pumped storage project in the world to do so.

NES Sales Opportunity: SSE has confirmed **£100 million** of development investment is already underway for Coire Glas. If the FID proceeds, procurement for civil works, tunnelling, electrical systems, turbine manufacturing, grid connection infrastructure and environmental monitoring will represent substantial NES-accessible contracts in the Scottish Highlands. Companies should engage with SSE Renewables procurement teams now.

UK PSH Pipeline: 11 Schemes, 10 GW Combined Capacity

Across Scotland and Wales, **11 pumped storage hydro schemes** are now at various development stages, with a combined capacity of **10 GW** and **200 GWh** of storage. These include Fearna PSH (1.8 GW, 36 GWh), Earba Storage Project (1,800 MW, 40,000 MWh — already consented), and Loch Kemp Storage (0.6 GW, 9 GWh). This pipeline collectively represents a major multi-year construction and engineering procurement opportunity for Scottish supply chain companies.

8. Policy & Regulatory Developments

UK Raises AR7 CfD Strike Prices for Offshore Wind

The UK government is raising its guaranteed strike prices for offshore wind in the next Allocation Round (AR8), which is due to open for bids in **May 2026**. AR7, concluded in January 2026, set a record by awarding **8.4 GW** of offshore wind capacity — the biggest single procurement of offshore wind in British and European history — with fixed-bottom offshore wind clearing at **£91.20/MWh** and floating offshore wind at **£216.49/MWh** (2024 prices). CfD contract terms were extended to **20 years** under AR7, improving project bankability and reinforcing the investment case.

North Sea Offshore Cable Cooperation – Five TSOs

At WindEurope Madrid, five European transmission system operators – from Belgium, Denmark, Germany and the Netherlands – signed a memorandum of understanding to jointly strengthen offshore cable infrastructure resilience in the North Sea. The initiative targets faster repairs, improved resource utilisation and joint solutions driven by growing offshore wind expansion and growing cross-border interconnector demands. This signals growing demand for cable inspection, protection, repair and installation services.

NES Sales Opportunity: NES subsea cable companies, marine ROV operators and inspection, repair and maintenance (IRM) firms have a direct route to European cable infrastructure contracts through this initiative. Scottish subsea engineering capabilities – developed through North Sea oil and gas – are directly transferable.

9. Key Upcoming Events for NES Companies

Event	Date	Location	Relevance
OEUK Aberdeen Breakfast Briefing: Wind Insight 2026	6 May 2026	P&J Live, Aberdeen	Offshore wind pipeline, grid access, policy
ECC NPT Pathfinder Engagement Event	8 May 2026	Online / London	CCUS project briefing
ECC NPT Pathfinder EOI Deadline	12 May 2026	Online	CCUS East Coast Cluster project access
OEUK North Sea CCS & Hydrogen Summit	1–2 June 2026	Sheraton, Edinburgh	CCS / hydrogen project intelligence
SPE Aberdeen Well Decommissioning 2026	3–4 June 2026	P&J Live, Aberdeen	Decommissioning sector
Global Offshore Wind 2026	16–17 June 2026	Manchester Central	Full offshore wind value chain

10. Grant Funding & Support Mechanisms Active This Week

Fund / Mechanism	Value	Deadline	Eligible NES Companies
GBE Supply Chain Fund: Offshore Wind & Networks	Up to £300m capital grants	10 December 2026	Manufacturers of offshore wind components, cables, foundations, nacelles
OWGP Industrial Growth Fund	£300k–£25m per project	Rolling	Supply chain firms expanding/building offshore wind manufacturing
ECC NPT Pathfinder Selection Process	Project support	12 June 2026 (EOI: 12 May)	CCUS project developers and supply chain
GBE £300m Supply Chain Fund drawdown window	Capital grants	Apr 2026 – Mar 2030	UK manufacturing capacity expansion

11. Sales Opportunity Summary for NES Supply Chain Companies

Sector	Opportunity	Timing	Priority
Floating Wind	Bellrock 1.8 GW (Nadara) – supply chain engagement phase	Now–2030	★★★★★
Decommissioning	500 overdue wells + 1,700 due in 6 years – P&A, topsides, logistics	Immediate	★★★★★
Fixed Wind	East Anglia THREE O&M + commissioning services	Immediate	★★★★★
CCUS	ECC NPT Pathfinder process – EOI 12 May 2026	Urgent	★★★★★
Fixed Wind	Crown Estate Leasing Round 6 (NE England, 6 GW) – pre-positioning	2026–2027	★★★★★
Hydrogen	Cromarty Hydrogen + HAR2 contracted projects	2026–2027	★★★
Pumped Storage	Coire Glas FID imminent – civil, electrical, grid works	2026–2029	★★★
Marine / Tidal	EMEC Blue Horizon array expansion	2026–2028	★★★
CfD Supply Chain	GBE Supply Chain Fund – manufacturing grant (closes Dec 2026)	Open now	★★★
Cables	North Sea TSO cable resilience initiative – inspection / IRM	2026–2028	★★★

This briefing covers the period 18–25 April 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

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