

UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 24 October 2026

Coverage Period	Audience	Classification
18 – 24 Oct 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 24 October 2026 were among the most important for the North-east Scotland supply chain this year. On 21 October Energy Secretary Miatta Fahnbulleh agreed that the North Sea Transition Authority (NSTA) could consent Adura’s Jackdaw gas field, 150 miles east of Aberdeen. First gas through Shearwater and St Fergus is expected around the end of October. The government says Jackdaw will lift UK gas output by about 6% at peak for up to 11 years and add £2.9 billion to the economy.

On the same day, Chancellor John Healey announced a £2 billion Energy Wealth Fund within the National Wealth Fund, to be topped up from future North Sea tax revenue. The NSTA was also given urgent powers to approve tiebacks before Transitional Energy Certificates become law, and it is tracking 15 more licensed projects worth about £10 billion. Ministers also asked Shell to submit its Brent decommissioning programme and launched a consultation on decommissioning guidance. Rosebank remains undecided: Fahnbulleh says the decision is hers alone, and Ithaca says it would probably stop UK investment if Rosebank is refused.

Offshore wind brought two major Scottish supply-chain wins. SSE named Aberdeen-based Seaway7 as preferred EPCI supplier for foundations and inter-array cables on the 1.4 GW Berwick Bank B project (20 October), supporting 465 UK jobs, including 400 in Scotland, ahead of final investment decision (FID) in late 2027. Sumitomo Electric opened the UK’s first HVDC subsea cable factory, a £350 million plant at Nigg, on 19 October. It will create 200 jobs, with production starting in July. Ofgem launched its largest-ever offshore transmission (OFTO) tender, about £3.5 billion for Hornsea 3 (21 October).

Elsewhere:

- Archer will stop bidding for offshore wind EPC work after cost overruns on the Culzean floating pilot and is considering selling Archer Wind (22–23 October).
- NEP and Net Zero Teesside Power reported more than £2.1 billion awarded to UK suppliers, and EnerMech won CCS pre-commissioning work (20–23 October).
- Foresight made a significant investment in the 1.8 GW / 40 GWh Earba pumped-storage scheme (19 October).
- The National Geothermal Centre’s roadmap calls for 10 GW of geothermal heat by 2050 and up to 50,000 direct jobs (20 October).
- Perenco completed the Leman South and Durango subsea decommissioning in the Southern North Sea (19 October).
- ITM Power reported record revenue of £43.6 million and a £144 million backlog (19 October).
- Unite’s 24-hour Apache strike shut seven Forties and Beryl installations on 21 October, and more action is planned for 4 November.

1. Offshore Wind — Fixed Bottom

SSE names Seaway7 preferred EPCI supplier for 1.4 GW Berwick Bank B (20 October 2026)

SSE Renewables appointed Aberdeen-based Seaway7 (Subsea7 group) as preferred supplier for the engineering, procurement, construction and installation (EPCI) of turbine foundations and inter-array cables on Berwick Bank B. The project is in the outer Firth of Forth, about 38 km off the Scottish Borders coast. The agreement is expected to support 465 UK roles: about 160 direct Seaway7 roles led from Aberdeen, 105 indirect UK supply-chain roles, and 200 direct and indirect jobs marshalling turbine foundations at a Scottish port, which SSE and Seaway7 will name in due course. With the Montrose O&M base (100 long-term jobs and about 30 construction roles), Berwick Bank commitments now support about 600 UK jobs, more than 500 of them in Scotland. The appointment is subject to a final contract and SSE's FID, expected in late 2027. Seaway7's Seaway Alfa Lift is one of three installation vessels expected to lead the campaign.

NES Sales Opportunity: This is the largest single Scottish offshore-wind supply-chain award of the year, and it is led from Aberdeen. Seaway7 will now build a supply chain for foundation fabrication interfaces, secondary steel, cable-protection systems, grouting, ROV and survey, marine coordination, crew transfer and quayside services. NES Tier 2/3 firms should register with Seaway7 procurement now. The unnamed Scottish marshalling port (200 jobs) is the next decision to watch, and Dundee, Leith, Montrose and Cromarty Firth suppliers should position for port-side scopes before FID in late 2027.

Ofgem opens £3.5bn Hornsea 3 OFTO tender; Balfour Beatty wins Birkhill Wood substation (21–22 October 2026)

Ofgem launched Tender Round 14 under its OFTO regime, its biggest-ever round, for the roughly £3.5 billion transmission assets connecting Hornsea 3 (due for completion by the end of 2027, powering 3.3 million homes). Successful bidders can earn inflation-linked revenue for up to 25 years. Since 2009, OFTOs have invested more than £10 billion across 28 offshore wind links. On 22 October National Grid awarded Balfour Beatty the first phase of the Birkhill Wood 400 kV substation in East Yorkshire under its £8 billion Electricity Transmission Partnership. Phase one covers early contractor involvement, detailed design and enabling works; main construction starts in 2027, with about 200 people at peak. The substation will connect 4.22 GW from the three later Dogger Bank phases. Also, this week, Wood Thilsted won detailed design of up to 100 monopiles for the 1.5 GW Outer Dowsing project off Lincolnshire (19 October). OEG ordered three 26 m crew transfer vessels from Diverse Marine in Cowes for delivery through 2027 (21 October).

NES Sales Opportunity: OFTO transfers create long-term buyers for cable inspection, export-cable repair readiness, substation O&M and HV services. NES subsea and HV firms should map the bidders for Hornsea 3 and the new Moray West owner. Outer Dowsing's monopile design is the step before fabrication and installation tenders, and Dogger Bank D/E/F grid works start in 2027. Both are English projects, but NES survey, geotechnical, cable-protection and marine-operations firms can win scopes on them.

Wick Harbour strategy role; BGS and Crown Estate seabed data programme (21–22 October 2026)

Highlands and Islands Enterprise (HIE) awarded Wick Harbour Authority up to £52,500 towards a new port strategy manager. The role will deliver the harbour masterplan and outline business case and pursue offshore wind O&M and other commercial work; applications close on 13 November, and community consultation events are planned for early November. Wick has been the main O&M base for Beatrice since 2018. Separately, the British Geological Survey began Seabed GeoMaP, a three-year Crown Estate-funded project to produce national seabed and shallow-subsurface datasets for the UK Continental Shelf, published through the Marine Data Exchange and BGS GeoIndex.

NES Sales Opportunity: Caithness O&M suppliers should take part in Wick's masterplan consultation in early November and engage the new strategy manager once appointed. Seabed GeoMaP will make national data openly available. Geophysical, geotechnical and survey firms should plan how to use it in early-stage site assessment offers, and expect developers to request more targeted site surveys once screening data is free.

2. Floating Offshore Wind

Archer to exit offshore wind EPC after Culzean floating pilot overruns (22–23 October 2026)

Norwegian contractor Archer will no longer pursue offshore wind EPC projects and is considering a partial or full sale of Archer Wind. The decision follows cost overruns and delays on the Culzean floating wind pilot, a 3 MW turbine on an Ocergy-designed foundation that will supply power to the Culzean platform in the UK central North Sea. Archer cited client-requested scope changes and welding defects at a Greek fabrication subcontractor, which delayed the project by more than five months. Tow-out is complete and commissioning is under way, with NEO NEXT+ Energy now leading the project. Disputes over variation orders and a subcontractor claim remain unresolved. Archer's net interest-bearing debt has risen to about \$525 million, and shareholder distributions are paused until early 2027.

NES Sales Opportunity: Culzean was the first INTOG oil-and-gas electrification floating project to reach the water, and its problems will make operators more cautious about similar projects. The lesson for NES firms is that quality assurance on fabrication and clear change-control on scope will decide margins. Inspection, NDT, welding QA and project-controls specialists can offer that de-risking to future INTOG and floating developers. Watch who buys Archer Wind, because the buyer will inherit its floating know-how and supply relationships.

Sumitomo opens Nigg HVDC cable factory; Swinney urges faster ScotWind decisions (19–22 October 2026)

Sumitomo Electric officially opened its £350 million subsea HVDC cable factory at the Port of Nigg on the Cromarty Firth on 19 October. It is the UK's first such plant and makes the UK a G7 country with its own HVDC cable manufacturing. Production of 525 kV XLPE HVDC cable starts in July, followed by inter-array cables for offshore wind. Existing contracts include SSEN Transmission's Shetland 2 link and National Grid's 140 km Sea Link. The plant expects 200 direct jobs and several hundred more in its supply chain and received £24.5 million from the Scottish Government. First Minister John Swinney urged faster UK decisions, grid progress and support for delayed ScotWind projects to create local demand. A Scotsman column by Port of Aberdeen (21 October) warned that a weak Strategic Spatial Energy Plan (SSEP) pathway could put more than 21,000 jobs a year at risk. Of NESO's six SSEP pathways, it said only two properly support Scotland's floating pipeline.

NES Sales Opportunity: The Nigg factory brings a manufacturer to the Moray Firth that will need local engineering, maintenance, logistics, cable handling, drum and reel services, testing and training. Contact Sumitomo Electric UK's procurement team before production starts in July. Its later inter-array cable output is directly relevant to floating wind, so floating developers may favour UK-made cable in supply-chain plans. The SSEP pathway choice is the single most important policy decision for NES floating-wind demand, so support the Scottish Renewables, ETZ and Port of Aberdeen submissions.

3. Hydrogen

ITM Power reports record £43.6m revenue and £144m backlog; FY27 guidance £50–60m (19 October 2026)

ITM Power's preliminary results for the year to 30 April 2026 showed revenue up 68% to £43.6 million, adjusted EBITDA loss down 39% to £20.2 million, and year-end cash of £215.6 million, including £40 million from GB Energy. The backlog stands at £144 million, with 83% of contracts profitable. A £46.5 million DESNZ grant is supporting a 1 GW UK Chronos manufacturing line in Sheffield. UK projects include Uniper's 120 MW Humber H2ub (HAR2 shortlist, FEED with ITM), MorGen Energy's 20 MW HAR1 project in West Wales (FID confirmed) and Octopus Energy Generation's 12.5 MW HAR1 contract. FY27 guidance is revenue of £50–60 million and an adjusted EBITDA loss of £17–20 million.

NES Sales Opportunity: UK electrolyser orders are tied mainly to HAR1 and the HAR2 shortlist. Until HAR2 winners are named, UK hydrogen volumes will stay small. NES balance-of-plant suppliers (compression, water treatment, power electronics, skids, instrumentation) should register with ITM for its UK and overseas projects and watch the Budget on 28 October for any HAR2 funding signal.

EnergyPathways advances MESH salt-cavern storage in the East Irish Sea (19 October 2026)

EnergyPathways signed technical agreements for data access and analysis to build geotechnical models for salt caverns at its Marram Energy Storage Hub (MESH) in the East Irish Sea, with onshore facilities at Barrow-in-Furness. The company says using existing data could avoid new appraisal drilling or seismic surveys, saving more than £20 million before FID, and it targets completion in the first half of 2027 to support debt financing. MESH combines gas storage, hydrogen production, compressed-air energy storage and offshore wind integration. EnergyPathways has also accelerated plans for a Barrow hydrogen and graphite plant targeting 20,000 tonnes of hydrogen a year.

NES Sales Opportunity: Offshore salt-cavern storage uses the same skills as NES subsurface and wells firms: geomechanics, reservoir modelling, well design, solution mining and subsea tie-in engineering. Firms with East Irish Sea experience should contact EnergyPathways as it moves from desk studies to engineering. Storage is the part of the hydrogen value chain closest to NES's existing capability.

4. CCUS

NEP and NZT Power: £2.1bn to UK suppliers; EnerMech wins CCS commissioning contract (20–23 October 2026)

NEP's 2026 Progress and Impact Report says the Northern Endurance Partnership and Net Zero Teesside Power have awarded more than £2.1 billion to UK suppliers through 300 UK subcontracts, with more than half of supply-chain content sourced domestically. The projects sustain more than 3,000 construction jobs and fund training for 175 young people on Teesside. NEP's proposed Humber CCS pipeline is forecast to generate about £1.2 billion of UK supplier contracts and around 1,800 FTE jobs a year once operating. On 23 October EnerMech announced a contract for pre-commissioning and commissioning of an unnamed major UK CCS development, covering nitrogen services, dewatering, drying, pigging and leak testing across onshore and offshore work. Cadent (23 October) argued that biomethane-derived bioCO₂ could supply about 17 Mt a year of carbon removals through HyNet and the East Coast Cluster if non-pipeline transport is allowed. CCSA chief executive Olivia Powis warned ahead of the Budget that competitors will take CCS investment if Britain hesitates (23 October).

NES Sales Opportunity: Track 1 is now moving from construction into commissioning, and EnerMech's award shows the type of work involved: nitrogen, pigging, drying, leak testing, pipeline integrity and offshore hook-up. NES pipeline-services and commissioning firms should target NEP and Liverpool Bay

commissioning packages over the next 12–18 months. The Humber expansion is the next major CCS pipeline opportunity. The Budget on 28 October will show whether Acorn and Viking (Track 2) keep their funding pace.

5. Marine & Tidal

Morlais seeks continued support ahead of first turbines in 2027; community-scale tidal on Islay (reported 19–23 October 2026)

Menter Môn Morlais, which manages the 240 MW Morlais tidal zone off Ynys Môn, called for continued government support during a visit by Welsh Cabinet Minister Adam Price (reported 23 October). The first turbines are expected in 2027, with phased build-out. A BBC feature this week profiled Flex Marine Power's 50 kW Swimmer Turbine, backed by £968,000 from the government's Energy Entrepreneurs Fund. Its roughly 20 components fit in a shipping container and can be launched from a village slipway without heavy-lift cranes. Islay residents have been trained to assemble it, and the company plans to return to Islay next year to supply the island. No new Scottish tidal-stream contracts were announced this week. The next commercial triggers are AR8's tidal ring-fence (bids 3–9 December) and Orbital's EURO-TIDES investment round.

NES Sales Opportunity: Tidal demand is moving towards multi-device arrays (EURO-TIDES, Morlais) and small community schemes. NES marine contractors, mooring and subsea-cable suppliers should approach Morlais berth holders now for 2027 deployments. Small fabricators and island marine-service firms should consider assembly and installation partnerships with community-scale developers such as Flex Marine Power. Keep capability statements current ahead of the AR8 tidal results in mid-February 2027.

6. Geothermal

National Geothermal Centre roadmap: 10 GW heat, 1.5 GW power and up to 50,000 direct jobs by 2050 (20–22 October 2026)

The National Geothermal Centre (NGC), led by Dr Charlotte Adams, published "Our Geothermal Nation", a roadmap with 16 recommendations. With support, it says the UK could deliver 10 GW of geothermal heat and 1.5 GW of electricity by 2050, supporting up to 50,000 direct and 125,000 indirect jobs. Geothermal currently supplies 2.1 TWh, about 0.3% of UK heat. The NGC has three immediate asks: resource the NGC as national coordinator, commission a costed exploration-risk pilot, and assess geothermal for suitable heat-network and public-estate projects. A proposed 24-month programme would launch a first-well guarantee pilot and a technology fund within 12 months. Proposed regional centres include Scotland. The roadmap says oil-and-gas drilling, engineering and subsurface skills transfer directly, and that 75–80% of future geothermal roles will be vocational, technician and engineering jobs.

NES Sales Opportunity: The NGC's first-well guarantee pilot is the mechanism that would turn Aberdeen's new geothermal working group (Foresterhill and NHS Grampian) into a drilling contract. NES drilling contractors, well-engineering consultancies and completions firms should support the roadmap's asks through Geothermal UK and the NGC. Prepare a "first well" package covering design, rig, casing, testing and monitoring for public-estate heat customers.

7. Decommissioning

Government asks Shell for Brent decommissioning programme and consults on new guidance (21 October 2026)

Alongside the Jackdaw decision, the government launched a consultation on decommissioning guidance and asked Shell to submit its Brent decommissioning programme, which has been under review since 2017. Government cites independent analysis that decommissioning could support up to 25,000 skilled jobs and attract up to £25.6 billion of investment over the next decade. Discussions will also refresh the North Sea Transition Deal first agreed in 2021. On 23 October the NSTA published its Reserves and Resources Report (as at end 2025).

NES Sales Opportunity: Restarting Brent's outstanding programme would release one of the largest remaining northern North Sea decommissioning scopes, including the gravity-base structures, pipelines and drill cuttings. NES decommissioning, engineering-down-and-clean, waste management and onshore dismantling firms should respond to the guidance consultation and contact Shell's decommissioning team. The 25,000-job figure gives the industry a strong case for clearer regulator timelines.

Perenco completes Leman South and Durango subsea decommissioning; Western Isles FPSO moved to Kishorn (19 October 2026)

Perenco UK completed plugging and abandonment of the Leman South (53/02a-15Y) and Durango (48/21a-4z) subsea wells in the Southern North Sea and removed associated infrastructure in a single campaign. It used Petrodec's HAEVA jack-up (Dixstone Group), following similar campaigns at Gawain, Arthur and Davy. Energy Voice also reported (19 October) that Dana Petroleum's 2017-built Western Isles FPSO has moved from Scapa Flow to Kishorn Port, where Ferguson Transport & Shipping supported mooring. Dana is still marketing the vessel after the field stopped production in 2024.

NES Sales Opportunity: Combining several subsea wells and structures into one campaign from a jack-up or vessel is now standard, which matches the NSTA well-decommissioning charter. NES P&A, cutting, ROV and recovery specialists should offer multi-asset campaign packages. Western Isles at Kishorn is either a redeployment opportunity or a future recycling job, so West Highland port and marine-service firms should follow Dana's decision.

8. Hydropower & Pumped Storage

Foresight invests in 1.8 GW Earba; Glen Earrach camp details; Highland MP calls for community benefits (18–22 October 2026)

Foresight Energy Infrastructure Partners II made a significant investment in Gilkes Energy's Earba pumped-storage scheme in the Central Highlands (1.8 GW / 40 GWh, enough on average for more than 1.4 million homes), which is the largest project on Ofgem's long-duration storage (LDES) minded-to list (19 October). The money will fund detailed engineering, procurement, site investigations and construction preparation. Ofgem's final LDES cap-and-floor decisions are expected this autumn. The Press and Journal (18 October) set out the Glen Earrach construction plan: a temporary camp for up to 1,000 workers near Balnain over about eight years, peak traffic of 178 HGV movements a day on the A831, on-site concrete batching, and community benefit of about £20 million a year. Inverness MP Angus MacDonald called for guaranteed lasting benefits from Earba, Coire Glas (1,440 MW, awaiting SSE FID) and Loch Kemp (660 MW), which together could roughly triple UK pumped-storage capacity (22 October).

NES Sales Opportunity: Earba now has private capital, a grid connection in Ofgem's re-opener process and LDES minded-to status, so procurement for site investigation, detailed engineering and early works is starting. NES ground-investigation, civils, tunnelling, M&E and HV firms should contact Gilkes Energy and Foresight now. Glen Earrach's camp plan sets out the support-services work involved (accommodation,

catering, coach transport, concrete supply and haulage). Highland firms should prepare bids that show local jobs and training, because community benefit is becoming a political condition of approval.

9. Policy

Jackdaw approved; £2bn Energy Wealth Fund; NSTA urgent tieback powers; Rosebank pending (19–23 October 2026)

Fahnbulleh approved production at Jackdaw on 21 October after the post-Finch reassessment. It is a Shearwater tieback with a lifetime output of about 40 million barrels of oil equivalent. Adura estimates 27 new direct jobs and 273 safeguarded, and the government expects gas from the end of October. Healey announced the £2 billion Energy Wealth Fund, which will be fed by future North Sea tax and invest in renewable and low-carbon infrastructure. The NSTA can now issue “TEC-like” licences in urgent cases for adjacent tiebacks that extend field life, and it is tracking 15 licensed projects worth about £10 billion. Fahnbulleh insists she alone will decide Rosebank, calling it a “different proposition” because its oil would be exported. Burnham said the decision will be “done properly” (23 October), Adura’s Neil McCulloch expects a decision “within weeks”, and Ithaca said it would probably halt UK investment if Rosebank is refused (19–20 October). Aberdeen & Grampian Chamber welcomed Jackdaw and called Rosebank “every bit as vital”. Scottish Energy Minister Stephen Gethins called for a “future generations fund” and replacement of the Energy Profits Levy (EPL).

NES Sales Opportunity: Jackdaw brings start-up, commissioning and early-life operations work for Shearwater and St Fergus. The urgent tieback route is the bigger near-term opportunity: up to 15 projects (about £10 billion) could move faster, and each needs subsea, tie-in, umbilical, pipeline and brownfield modification work that NES firms already supply. Find out which operators hold these 15 licensed projects and be ready for quick tenders. Keep Rosebank pipelines warm, but plan around a decision late in 2026 or in January.

Budget on 28 October; GB Energy priorities; grid growth plan; Ofgem gas resilience; Apache strike (19–23 October 2026)

Chancellor John Healey presents the Autumn Budget on 28 October, with industry pressing for a clear path away from the EPL. Politico (20 October) reported that GB Energy’s original £8.3 billion budget has been redirected towards nuclear (£2.5 billion), local power (£1 billion), supply chains (£1 billion) and Great British Grid. GB Energy chief executive Dan McGrail and chair Juergen Maier visited Shetland (20–22 October). The ENA and BEAMA Electricity Networks Sector Growth Plan (20 October) projects £58 billion of GVA and more than 210,000 jobs by 2035 from up to £200 billion of network investment, with Energy Minister Michael Shanks chairing a new Growth Partnership. Ofgem approved £642.1 million for Bramford–Twinstead (19 October). It also consulted, until 20 November, on keeping Belgium interconnector import capability at under 10p a month per gas customer (22 October). Unite’s 24-hour strike by about 160 Apache workers shut seven Forties and Beryl installations on 21 October, and further action is planned for 4 November.

NES Sales Opportunity: The Budget decides three NES priorities: the EPL’s future, CCUS Track 2 pace and green-levy reform. Prepare scenario plans for all three before 28 October. The grid growth plan and Great British Grid point to sustained demand for HV, substation and cable services, which is a diversification route for oil-and-gas electrical and instrumentation firms. Build strike contingency into Forties and Beryl campaigns around 4 November and into Harbour Energy campaigns around 3–4 November.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
25 Oct 2026	UK clocks go back (GMT)	National	Offshore shift and logistics planning
28 Oct 2026	Autumn Budget 2026 (Chancellor John Healey)	Westminster	EPL, CCUS Track 2, green levies
End Oct 2026	Jackdaw first gas expected (Shearwater / St Fergus)	Central North Sea	Start-up and early operations
31 Oct 2026	NESO Gate 2 Phase 1 connection-offer deadline (extended)	National	Firm grid dates for projects
3–4 Nov 2026	Wood Group strike, 48-hour walkout (Harbour Energy assets)	Central North Sea	Campaign scheduling risk
4 Nov 2026	Further Apache strike action planned (Unite)	Forties / Beryl	Campaign scheduling risk
4–5 Nov 2026	Global Offshore Wind Investment Forum	London	Developer and investor access
Early Nov 2026	Wick Harbour masterplan community consultation events	Wick, Caithness	O&M port development
13 Nov 2026	Wick Harbour port strategy manager applications close	Wick, Caithness	Port business development
19 Nov 2026	AR8 Notice of Auction (NESO) and pot budgets (DESNZ)	National	Floating, ODOV and tidal budgets
20 Nov 2026	Ofgem gas interconnector import capability consultation closes	National	Gas security framework
3–9 Dec 2026	AR8 sealed-bid window (indicative)	National	Supplier pricing locked in
10 Dec 2026	GB Energy Supply Chain Fund: final application close	National	Manufacturing capex grants
Mid-Feb 2027	AR8 results	National	Offshore wind and tidal order triggers
Jul 2027	Sumitomo Nigg HVDC cable production starts	Cromarty Firth	Factory services and logistics
Late 2027	Berwick Bank B final investment decision (SSE)	Firth of Forth	Seaway7 EPCI supply chain

11. Grant Funding & Support Mechanisms Active This Week

Mechanism	Amount / Scope	Deadline	Relevance to NES
Energy Wealth Fund (within National Wealth Fund)	£2bn initial; topped up by North Sea tax	Announced 21 Oct; details to follow	Renewable and low-carbon infrastructure

Mechanism	Amount / Scope	Deadline	Relevance to NES
GB Energy Supply Chain Fund: Offshore Wind and Networks	£300m capex grants; 29 eligible components	Closes 10 Dec 2026 (or earlier)	Jackets, cables, HV kit, components
CfD AR8 (DESNZ / NESO)	Pot budgets 19 Nov; incl. floating, ODOW, tidal	Bids 3–9 Dec 2026	Revenue support underpinning orders
Ofgem OFTO Tender Round 14 (Hornsea 3)	~£3.5bn transmission assets; up to 25-yr revenue	Tender open	Cable and substation O&M buyers
HIE port development support	Up to £52,500 for Wick strategy role	Applications close 13 Nov	Caithness O&M port growth
Scottish Government Offshore Wind Investment Programme	Up to £500m via SE, HIE, SNIB	Rolling to 2028/29	Ports and manufacturing
DESNZ electrolyser manufacturing grant	£46.5m for ITM 1 GW Chronos line	Drawn down as spent	Hydrogen manufacturing supply chain
CCUS Track 1 (East Coast Cluster, HyNet)	£2.1bn+ awarded to UK suppliers	Live	Commissioning, integrity, pipelines
Ofgem LDES cap-and-floor Window 1	Pumped storage and long-duration projects	Final decisions autumn 2026	Earba, Coire Glas, Loch Kemp, Glen Earrach
Energy Entrepreneurs Fund (DESNZ)	Innovation grants (e.g. £968k Flex Marine)	Rolling rounds	Marine and clean-tech innovators
NGC first-well guarantee pilot (proposed)	Exploration-risk cover for geothermal	Proposed within 12 months	Drilling and well engineering

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
Berwick Bank B (Seaway7 EPCI)	1.4 GW; foundations and inter-array cables; 465 UK jobs; marshalling port TBC. Secondary steel, cable protection, ROV, marine.	★★★★★	Now to FID late 2027
Urgent tiebacks (NSTA TEC-like licences)	15 licensed projects (~£10bn) tracked. Subsea, tie-in, umbilicals, pipelines, brownfield mods.	★★★★★	Now
Jackdaw start-up (Adura)	Approved 21 Oct; first gas ~end Oct via Shearwater/St Fergus. Commissioning, early operations.	★★★★★	Oct – Dec 2026
Track 1 CCS commissioning (NEP, Liverpool Bay)	£2.1bn to UK suppliers; EnerMech award. Nitrogen, pigging, drying, leak testing, integrity.	★★★★	2026 – 2027
Sumitomo Nigg factory services	£350m HVDC plant; 200 jobs; production July. Maintenance, logistics, cable handling, testing.	★★★★	Before Jul 2027

Opportunity	Details	Rating	Action Window
Earba pumped storage (Gilkes / Foresight)	1.8 GW / 40 GWh; investor on board; LDES decision due. GI, civils, tunnelling, HV.	★★★★	Engage now
Brent decommissioning programme (Shell)	Government requests submission; guidance consultation open. EDC, GBS, pipelines, waste.	★★★★	Consultation + 2027
Hornsea 3 OFTO (£3.5bn)	Tender Round 14 open; long-term asset owner. Cable inspection, substation O&M, HV services.	★★★	Map bidders now
Multi-asset subsea P&A campaigns	Perenco Leman South / Durango model. P&A, cutting, ROV, recovery packages.	★★★	Rolling
Floating QA and project controls	Archer exits after Culzean overruns. NDT, welding QA, change-control services for INTOG/floating.	★★★	Next INTOG tenders
Geothermal first wells	NGC roadmap: 10 GW heat by 2050; first-well guarantee pilot proposed. Drilling, completions.	★★★	12–24 months
Wick Harbour O&M growth	HIE-funded strategy role; masterplan consultation early Nov. O&M, port services.	★★★	Nov 2026
Offshore salt-cavern storage (MESH)	East Irish Sea geotechnical studies to H1 2027. Geomechanics, wells, subsea.	★★	2027
Tidal arrays (Morlais, EURO-TIDES)	Morlais first turbines 2027; AR8 tidal ring-fence. Moorings, cables, marine ops.	★★	2027
Hydrogen BOP (ITM)	£144m backlog; UK HAR1/HAR2 projects. Compression, water treatment, skids.	★★	After HAR2

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