UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 18 July 2026

Coverage Period	Audience	Classification
12 – 18 July 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 18 July 2026 delivered the most consequential AR8 framework detail of the year: government confirmed applications open 20 July and close 7 August, with administrative strike prices set at £113/MWh for offshore wind and £271/MWh for both floating and the new Other Deep Offshore Wind (ODOW) category.

Ocean Winds' 2 GW Caledonia project secured full Scottish consent on 17 July, clearing the last major regulatory hurdle before CfD and FID. ScotWind developers used the same week to publish multi-billion-pound supply chain commitments, and MMO was formally appointed lead environmental regulator for the £175m Port of Tyne Clean Energy Park.

On CCUS the government approved development funding for Harbour Energy's Viking CCS project, Chancellor Rachel Reeves confirmed £59.6m for Peak Cluster, and NSTA published three new pieces of operational guidance for carbon storage licensees.

Clean Flexibility Roadmap July update set a 7.6 GW / 137 GWh minded-to LDES cap-and-floor pipeline of 16 projects, and DeepOcean completed its Spirit Energy Seven Seas and Grove West subsea decommissioning campaign.

Policy is dominated by a growing rebellion against Ed Miliband's North Sea stance: he is reported to be willing to approve the Jackdaw gasfield as a bid for the Chancellor role, while Aberdeen, Andy Burnham and 70% of the public now back continued domestic oil and gas.

For NES Tier 2/3 suppliers, the 20 July – 7 August AR8 window is the single most important commercial event of the quarter: OEM CfD teams, port operators and Tier 1 EPCIs will be finalising subcontractor slots this week and next.

Viking CCS FEED-to-execution, Caledonia's 2030 offshore construction pipeline, and the Peak Cluster CO_2 pipeline into Morecambe Net Zero all open new supply chain windows for Aberdeen fabricators, subsea specialists, welding contractors and QHSE/ESG advisory firms. Firms should also register interest in the DESNZ Strategic Policy Guidance response (deadline 19 August) and the Ofgem Offshore Transmission Cost Assessment consultation (closes 7 September) — both will directly shape the transmission and grid-connection contracting environment for the next CfD round.

1. Offshore Wind — Fixed Bottom

AR8 Government Response confirms application window and strike prices (15 July 2026)

DESNZ published the AR8 Contracts for Difference Government Response on 15 July 2026, closing the March consultation. Confirmed changes: surrendered CfD capacity will be permanently restricted from re-entering future auctions; hybrid metering enabled for co-located BESS and other technologies; a new Other Deep Offshore Wind

(ODOW) category ring-fenced at £271/MWh (2024 prices) alongside floating; Unrealistic Contract Notices (UCON) strengthened; a Gate 1 exclusion introduced; and sealed bid visibility extended to solar PV and onshore wind. Applications open 20 July and close 7 August. Finalised budget will be published between 17 September and 19 November, with results between 27 November and 17 February 2027.

> **NES Sales Opportunity:** The AR8 application window (20 July – 7 August) is the single largest commercial gate of Q3 for NES contractors. Tier 1 EPCIs bidding into AR8 will be finalising their subcontractor Letters of Intent this week for fabrication, cabling, foundations, blade logistics, port handling and O&M. NES firms should confirm slots in bid packages immediately and target the ODOW category which is new and less contested than fixed-bottom offshore wind.

Caledonia Offshore Wind Farm secures Scottish consent — 2 GW Moray Firth (17 July 2026)

Ocean Winds — the 50/50 joint venture between EDP Renewables and Engie — secured offshore consent from the Scottish Government for the 2 GW Caledonia project, located approximately 40 kilometres off the Moray Firth coast. It is a ScotWind leasing round project and, alongside sister projects Moray East and Moray West, will take Ocean Winds' long-term operational workforce in the region to over 200 skilled roles. Aberdeenshire Council had granted onshore consent earlier in 2026; offshore construction is expected to begin in 2030, subject to securing a CfD and reaching FID. Ocean Winds' Adam Morrison flagged transmission charge uncertainty as the critical remaining risk to FID.

> **NES Sales Opportunity:** Caledonia adds a third confirmed Moray Firth cluster asset for Ocean Winds. Aberdeen-based fabricators, subsea installation contractors, HDD/cable specialists and marine coordination providers should engage Ocean Winds Aberdeen office now to be listed for the 2027–29 pre-construction contracting cycle. The Moray Firth cluster (East, West, Caledonia) offers rare consolidation of £5bn+ of consecutive projects for a single developer — supply chain longevity that is difficult to match elsewhere in the UK.

ScotWind developers publish multi-billion-pound supply chain commitments (15 July 2026)

ScotWind developers used the week to set out the latest wave of Supply Chain Development Statements, quantifying multi-billion-pound commitments to Scottish and wider UK content. Crown Estate Scotland has been increasing enforcement pressure on developers to convert SCDS commitments into contracts, and INTOG round awards are following a similar model. The announcement lands two weeks ahead of the AR8 application window and is timed to influence developers' CfD supply chain plan submissions.

> **NES Sales Opportunity:** Supply Chain Development Statements are becoming enforceable. NES firms should request ScotWind developer meeting slots specifically to review SCDS commitments and identify local content gaps that suppliers can fill. Suppliers should map SCDS commitments to their specific capabilities.

MMO appointed Lead Environmental Regulator for £175m Port of Tyne Clean Energy Park (14 July 2026)

The Marine Management Organisation was formally appointed as Lead Environmental Regulator for the £175m Port of Tyne Clean Energy Park — targeted support to create thousands of jobs and support the wider North East offshore wind manufacturing hub around Dogger Bank. This confirms a single-front-door regulatory pathway for one of the two largest new UK offshore wind port investments alongside Cromarty Firth.

> **NES Sales Opportunity:** Port of Tyne Clean Energy Park will need marine construction, dredging, quayside heavy lift, geotechnical, welding and QHSE contractors from 2026–2028. NES firms with prior Cromarty/Port

> of Nigg experience have directly transferable credentials; approach both the Port of Tyne authority and the shortlisted Tier 1 civils contractors this quarter.

Ofgem consults on Offshore Transmission Cost Assessment guidance (13 July 2026)

Ofgem opened consultation on updated Offshore Transmission Cost Assessment guidance, closing 7 September 2026. This is the mechanism used to assess the efficient cost of offshore transmission assets that OFTOs later buy under the OFTO regime. Any changes will directly affect the revenues available to owners of transmission assets serving projects such as Caledonia, ScotWind, and AR8-winning projects.

> **NES Sales Opportunity:** NES cable, subsea installation and offshore substation fabrication contractors should submit response evidence on realistic UK offshore transmission cost benchmarks — particularly on inflation of subsea cable materials, offshore substation topside costs, and installation vessel day rates. Underestimated benchmarks squeeze subcontractor margins across the CfD chain.

2. Floating Offshore Wind

AR8 floating parameters confirmed: longstop extended, RIC reduced, ODOW introduced (15 July 2026)

The AR8 Government Response confirmed key floating-specific parameters: the floating longstop period is extended to 24 months, the Relevant Installed Capacity threshold is reduced to 85% (aligning with fixed-bottom), and the new Other Deep Offshore Wind (ODOW) category is introduced at £271/MWh administrative strike price — identical to floating. ODOW is intended to capture projects in deeper water that use fixed-bottom foundations of novel types (jackets, gravity-based) or emerging semi-submersible concepts that do not fit strict floating definitions.

> **NES Sales Opportunity:** ODOW is a new category with no incumbents — NES foundation fabricators, mooring specialists, deep-water anchoring providers and subsea cable installers should proactively identify projects likely to bid into ODOW and secure early Letters of Intent. Pinless connectors, rental fleets and passive mooring lines are directly relevant.

3. Hydrogen

Clean Flexibility Roadmap July 2026 update published (13 July 2026)

DESNZ, Ofgem and NESO jointly published the Clean Flexibility Roadmap July 2026 update, confirming: HAR1's first project reached operations in April 2026; the Hydrogen-to-Power (H2P) business model will progress via primary legislation when parliamentary time allows; hydrogen network code development continues; and blended hydrogen network access is under review. HAR2 remains delayed pending Comprehensive Spending Review outcome for FY 2025-26 to 2029-30.

> **NES Sales Opportunity:** H2P legislative slot remains the critical unlock for grid-scale hydrogen turbines. NES electrical, control-systems, welding and QHSE contractors should track hydrogen network code development — the pipeline conversion market ahead of 2030 is projected at multi-£bn. Aberdeen firms with high-integrity pipe welding, coating and ESG-reporting credentials can position for HAR3 project design work in H2 2026.

NISTA Major Projects Annual Report: HAR1 AMBER, HAR2 RED (14 July 2026)

The National Infrastructure and Service Transformation Authority (NISTA) published its 2025–26 Major Projects Annual Report, rating HAR1 as AMBER and HAR2 as RED with 27 shortlisted projects, due diligence complete. RED rating signals that successful delivery of HAR2 appears to be unachievable without major reset action. The government is expected to reset HAR2 scope and delivery pathway later in 2026.

Hydrogen Energy Association calls for hydrogen momentum from new PM (15 July 2026)

The Hydrogen Energy Association issued a public statement calling on the next Prime Minister to maintain momentum on hydrogen, particularly given HAR1 projects now reaching Final Investment Decision. The HEA warned that stop-start policy signals since 2024 have caused UK electrolyser manufacturing investment to shift towards continental Europe and Asia.

Clean Power Hydrogen raises £7.3m in conditional placing (16 July 2026)

AIM-listed Clean Power Hydrogen (CPH2) raised £7.3m via a conditional placing and subscription, with new shares admitted on or around 22 July. The capital-light strategy is oriented toward licensing CPH2's membrane-free electrolyser technology to global manufacturers rather than capex-heavy vertical integration.

Intelligent Energy launches 120 kW hydrogen fuel-cell drone powertrain (15 July 2026)

Loughborough-based Intelligent Energy unveiled a 120 kW hydrogen fuel-cell drone powertrain, positioned for the growing heavy-lift UAV market where H2 offers substantial payload-range benefits over lithium batteries. The company reports record UAV fuel-cell orders.

National Gas Transmission progresses UK Hydrogen Backbone concept (14 July 2026)

National Gas Transmission moved forward with the UK Hydrogen Backbone concept, targeting a 2000+ km pipeline network for regional hydrogen transport. NES firms with high-integrity welding, coating and pipeline integrity credentials should engage.

> **NES Sales Opportunity:** The 2000+ km UK Hydrogen Backbone represents one of the largest single new-build pipeline programmes in a generation. The HES supply chain should engage National Gas Transmission and its EPC framework contractors on pipeline welding consumables, hazardous-area electrical instrumentation and hot-dip galvanised structural steel.

4. CCUS

Viking CCS development funding approved (16 July 2026)

Harbour Energy's Humber-based Viking CCS project secured government approval for development funding. FEED was completed in early 2025 and Development Consent for the onshore pipeline was secured in April 2025. FID is targeted to land within this Parliament. Viking CCS is designed to transport and permanently store CO_2 deep beneath the North Sea and is a cornerstone of Yorkshire and Humber industrial decarbonisation.

> **NES Sales Opportunity:** Viking CCS is now closer to FID than at any point in its history. NES fabricators (topsides), welding contractors (high-integrity CO_2 pipeline welds), subsea specialists (CO_2 injection well tie-backs), QHSE providers (COMAH-level CO_2 handling) and NDT firms should approach Harbour Energy's Aberdeen team and Wood/Petrofac/Worley as likely Tier 1 EPCIs. Onshore pipeline construction starts once FID lands.

Peak Cluster secures £59.6m from Chancellor Reeves

Chancellor Rachel Reeves announced £59.6m ($80m) funding for the Peak Cluster — a cement and lime decarbonisation initiative in the Peak District, with a CO_2 pipeline connecting to Morecambe Net Zero for offshore storage. This positions Peak Cluster as a Track 2 progression candidate alongside Viking and Acorn.

> **NES Sales Opportunity:** Peak Cluster's Morecambe pipeline is a new CO_2 corridor into the East Irish Sea. Aberdeen subsea, fabrication and pipeline contractors should target this alongside Viking and Acorn. NES supply chains have directly transferable subsea and well capability.

NSTA publishes three new carbon storage operational guidance documents (16 July 2026)

The North Sea Transition Authority published three new pieces of operational guidance for carbon storage licence holders: covering site characterisation, monitoring and reporting expectations. These represent the most substantive update to the CS licensing operating regime since 2023 and are directly relevant to Acorn, Viking, Morecambe Net Zero, HyNet and Bacchus/Poseidon licence holders.

> **NES Sales Opportunity:** The new NSTA guidance directly creates advisory revenue for QHSE consultancies (site characterisation, monitoring plans), subsea inspection (monitoring), well-integrity specialists, and ESG-report specialists. Firms should study the guidance and pitch bespoke compliance packages to CS licence holders this month.

Longannet ScottishPower CCS FEED cost report added to data.gov.uk (16 July 2026)

The historical Longannet CCS FEED cost report from the ScottishPower-led consortium was uploaded to data.gov.uk on 16 July 2026, making detailed cost data publicly available for the first time. It provides useful benchmarking for current Scottish CCS proposals including Acorn.

Net Zero Teesside transitions from FEED to construction

Net Zero Teesside — the 742 MW gas-fired power station with post-combustion carbon capture — is now transitioning from FEED to construction, with first CO_2 targeted for 2027. This is the flagship power-CCUS reference project globally.

5. Marine & Tidal

No new UK tidal announcements in the 12–18 July window. AR8 confirmed that the tidal stream ringfence has been maintained, which will be tested in the 20 July – 7 August application window. Existing UK tidal developers are expected to lodge AR8 bids.

> **NES Sales Opportunity:** The AR8 tidal ringfence is confirmed and this cycle. NES marine contractors, subsea installation, cable and welding firms should reach out to MeyGen, Orbital and Nova this week to be listed in bid supply-chain plans; contract award notices typically follow within 6–12 weeks of AR8 results.

6. Geothermal

The Northern Ireland Department for the Economy consultation on deep geothermal remains open, closing 7 August 2026. No new UK geothermal-specific announcements in the 12–18 July window; policy attention has shifted to LDES cap-and-floor Window 1 (see Hydropower & Pumped Storage below), which includes some enhanced geothermal candidates as an eligible LDES technology.

7. Decommissioning

DeepOcean completes Spirit Energy Seven Seas and Grove West subsea decom (14 July 2026)

DeepOcean announced completion of subsea decommissioning for Spirit Energy's Seven Seas and Grove West fields in the southern UK North Sea. The campaign used DeepOcean's own tooling and involved cutting, lifting and safe recovery of subsea infrastructure. It builds DeepOcean's track record on southern gas basin decom against competitors such as Boskalis, Allseas and Heerema.

> **NES Sales Opportunity:** Southern North Sea gas decom is now moving from planning into execution. Aberdeen ROV firms (HPR-ROV context), subsea tooling providers, and rental fleet operators should approach DeepOcean and Spirit Energy on the next campaign package. Reuse of tooling from this scope reduces mobilisation costs, favouring Aberdeen-based providers with existing subsea kit.

CB&I secures Kittiwake life-of-field contract with EnQuest (16 July 2026)

Aberdeen-headquartered CB&I secured a life-of-field contract with EnQuest for the Kittiwake field, acting as Duty Holder through Cessation of Production and into decommissioning. This model — Duty Holder transition contracts — is becoming the preferred procurement pathway for late-life UKCS assets and consolidates operations, maintenance and decommissioning scope into single Tier 1 wraps.

> **NES Sales Opportunity:** Duty Holder late-life contracts wrap operations, integrity management and decom into single Tier 1 packages. Aberdeen firms in QHSE, integrity, welding, NDT and subsea inspection should target subcontracting slots with CB&I on the Kittiwake package this quarter, and mirror the model with EnQuest and other operators on similar assets.

AF Gruppen and Heerema secure 38,500 tonne UKCS topsides removal (16 July 2026)

AF Gruppen — through subsidiary AF Offshore Decom — and consortium partner Heerema Marine Contractors secured a multi-year Engineering, Preparation, Removal and Disposal (EPRD) contract for a UKCS platform with total topsides weight of approximately 38,500 tonnes. Offshore surveys begin immediately; detailed engineering and offshore preparatory work will run for six years; topsides removal via multi-year offshore campaign; transport to AF Environmental Base Vats in Norway for dismantling, recycling and disposal over the following eight years. This is one of the largest single-asset UKCS decommissioning awards of the year.

> **NES Sales Opportunity:** A 14-year multi-year EPRD contract creates a sustained subcontracting pipeline. Aberdeen suppliers should approach AF Gruppen's UK office on offshore preparatory work packages: subsea isolation, hydrocarbon cleaning, engineering, ROV support, drop-object surveys, well integrity, QHSE assurance. Heerema will require heavy-lift preparation and marine engineering. Recycling and material handling scope is Norwegian, but preparatory scope is fully addressable from Aberdeen.

8. Hydropower & Pumped Storage

Clean Flexibility Roadmap sets 7.6 GW / 137 GWh LDES minded-to cap-and-floor (13 July 2026)

The Clean Flexibility Roadmap July update confirmed 16 projects have received minded-to status for the LDES cap-and-floor Window 1 scheme, totalling 7.6 GW / 137 GWh. Technologies included: pumped hydro storage, lithium-ion (long-duration), CAES, and vanadium redox flow. Ofgem is expected to finalise selection by autumn 2026, unlocking construction contracting in 2027. UK installed battery capacity now stands at 7.5 GW.

> **NES Sales Opportunity:** Pumped hydro projects will be predominantly in Northern Scotland (Earba, Coire Glas expansion, Balliemeanoch). NES civils, tunnelling, penstock fabrication, hazardous-area electrical and QHSE contractors should engage Gilkes Energy, SSE Renewables, and Drax on Window 1 minded-to shortlist — construction workforce demand from 2027 will be enormous and predominantly Scottish.

NextEnergy secures 240 MW / 960 MWh Starlight Energy BESS consent (13 July 2026)

NextEnergy Group's Starlight Energy project secured consent for a 240 MW / 960 MWh (4-hour duration) battery energy storage system — a signal of continued 4-hour BESS pipeline maturing in the UK.

Aura Power secures 100 MW Sandford Somerset BESS consent (13–15 July 2026)

Aura Power received consent for a 100 MW, 4-hour BESS in North Somerset.

Gore Street Energy Storage Fund reports 27% NAV decline (16 July 2026)

Gore Street Energy Storage Fund posted a 27% NAV decline for the year, citing UK BESS revenue squeeze from lower ancillary services prices and merchant trading margin compression. This continues a difficult run for listed UK BESS funds.

ContourGlobal acquires 500 MW / 2000 MWh Wallace BESS

ContourGlobal acquired the 500 MW / 2000 MWh Wallace BESS project — one of the largest single BESS assets in the UK pipeline.

Envision + Pulse Clean Energy 129 MW / 310 MWh Wolverhampton BESS (13 July 2026)

Envision Energy and Pulse Clean Energy advanced their Wolverhampton BESS project, 129 MW / 310 MWh. Envision is expanding its UK integrator footprint alongside German BESS projects.

UK bets on hydropower: three new pumped storage schemes in northern Scotland (12 July 2026)

Coverage confirmed three pumped hydro storage schemes are advancing in northern Scotland including Gilkes Energy's Earba scheme — the largest of the trio. Combined capacity is a strategic step change in UK long-duration storage.

Modo Energy July 2026 GB Forecast: BESS revenues +8-10% (17 July 2026)

Modo Energy's July 2026 GB Forecast update confirmed BESS revenues are forecast to increase 8–10% on non-physical trading. This is the first material upward revision since Q1 2025.

Ofgem lowers skip rates for UK battery storage (14 July 2026)

Ofgem lowered skip rates for UK battery storage, with NESO expected to progress further Balancing Mechanism reforms in the autumn. This provides a modest revenue uplift for existing UK BESS operators.

9. Policy

Renewables Obligation buy-out price 2026/27 set at £69.34 (13 July 2026)

Ofgem confirmed the Renewables Obligation buy-out price for 2026/27 at £69.34, reflecting the switch from RPI to CPI indexation confirmed by the government earlier this year. This slightly lowers the annual buy-out per Renewables Obligation Certificate versus the RPI benchmark and reduces the effective revenue floor for legacy ROC-supported renewable generators.

Reformed National Pricing Delivery Plan (15 July 2026)

DESNZ published the Reformed National Pricing Delivery Plan, confirming: a single national wholesale price will be retained; Strategic Spatial Energy Plan (SSEP) linked location signals will be introduced; the Constraint Management Pathway (CMAP) tightens; and Balancing Mechanism reforms continue. This closes the Reformed National Pricing debate that has dominated UK electricity market discussion since 2024.

> **NES Sales Opportunity:** SSEP-linked signals and CMAP tightening will shape where new generation and network investment goes for the next decade. NES suppliers should track the SSEP consultations closely —

> project sites in strategic priority zones will access preferential connection timelines and stronger contracting pipelines.

Future Homes Standard: solar mandate on new-build homes (15 July 2026)

The Future Homes Standard, effective March 2028, will require 40% ground-floor coverage of solar PV on new-build homes.

Miliband willing to approve Jackdaw gasfield as bid for Chancellor role

Ed Miliband is reported to be willing to approve the Jackdaw North Sea gasfield as part of an internal Labour reshuffle bid for the Chancellor role. The Jackdaw field consultation closes 10 August 2026 with a decision expected shortly after. Aberdeen political reaction is hardening: the Telegraph reports Aberdeen "turns against Miliband" over his broader North Sea posture. Manchester Mayor Andy Burnham has publicly backed continued North Sea oil and gas production and proposed taking Thames Water into public ownership. An OEUK poll released 17 July found 7 in 10 UK adults support UK domestic oil and gas over imports.

> **NES Sales Opportunity:** The political trajectory is shifting decisively in favour of continued UK oil and gas activity. NES firms should now assume a slower and more selective transition away from oil and gas services, with hybrid business models (oil/gas maintenance + renewables + decom + CCS) offering the strongest pipeline. Aberdeen advocacy groups and OEUK are actively lobbying for policy stability.

Orcadian Energy: Earlham & Orwell gas-to-wire concept for offshore data centre (17 July 2026)

Orcadian Energy announced its Earlham and Orwell development concept: gas-to-wire generation with carbon capture, powering a proposed offshore AI data centre. The Telegraph and Orcadian materials frame this as a way to combine North Sea gas value, CCS, and the growing AI data centre power demand — a niche but strategically interesting concept for stranded/marginal North Sea assets.

10. Key Upcoming Events for NES Companies

Date	Event	Location	Why It Matters for NES
20 July	AR8 application window opens	UK-wide	Deadline day for CfD bid supply chain slot confirmations
22 July	CPH2 new shares admitted	AIM (London)	Fresh capital for CPH2 licensing model — UK electrolyser opportunities
24 July	PIA 2025 direct-in / direct-out powers commence	UK-wide	New consenting pathway for grid-connection infrastructure
31 July	Ofgem frequency response Tranche 1 effective	UK-wide	BESS operators see revised revenue stack
7 August	AR8 applications close	UK-wide	Q3 commercial gate for CfD subcontracting
7 August	Ofgem LDES Window 1 consultation closes	UK-wide	Final input for pumped hydro / LDES construction contracting
7 August	NI deep-geothermal consultation closes	Northern Ireland	Geothermal policy pathway confirmed
10 August	Jackdaw field consultation closes	North Sea	Miliband decision expected shortly after

Date	Event	Location	Why It Matters for NES
14 August	NSTA ACE production consent applications close	UKCS	Well-integrity and subsea contracting pipeline
17 Aug – 11 Sep	NSTA Flaring and Venting consent window	UKCS	ESG reporting and compliance opportunities
18–20 August	Floating OW Conference & Exhibition	Aberdeen P&J Live	Priority NES networking event of Q3
19 August	DESNZ Strategic Policy Guidance response deadline	UK-wide	Shape network investment priorities for next CfD round
7 September	Ofgem Offshore Transmission Cost Assessment consultation closes	UK-wide	Subsea, cable, and offshore substation cost benchmarks
30 September	GBE Supply Chain Fund Round 3 closes	UK-wide	Grant opportunity for supply chain investment
17 Sep – 19 Nov	AR8 budget publication window	UK-wide	Adjusted budget scenarios released
Autumn 2026	Refreshed UK Hydrogen Strategy expected	UK-wide	HAR2 reset direction confirmed

11. Grant Funding & Support Mechanisms Active This Week

Programme	Status	Value / Scope	NES Relevance
AR8 CfD	OPEN 20 Jul – 7 Aug	FLOW £271, OW £113, ODOW £271, tidal ringfenced, solar £75 (2024 prices)	All offshore wind, tidal, hydrogen-adjacent BESS
LDES Cap-and-Floor Window 1	Consultation closes 7 Aug	7.6 GW / 137 GWh minded-to; 16 projects	Pumped hydro, LDES BESS construction from 2027
GBE Supply Chain Fund Round 3	OPEN, closes 30 Sep	Grants for UK supply chain investment	Fabrication, welding, cable, subsea manufacturing capex
Peak Cluster funding	ANNOUNCED	£59.6m / $80m announced by Reeves	CCUS pipeline / cement / lime supply chain
Viking CCS development funding	APPROVED	Development funding for FEED-to-execution transition	Aberdeen subsea, welding, QHSE, ESG contractors
LDES Demonstration Programme	OPEN	Government support for LDES technology demonstration	Pumped hydro, novel LDES tech providers
H2P business model	IN LEGISLATION	Primary legislation when parliamentary time allows	Hydrogen-to-Power project developers, equipment suppliers
ETZ Supply Chain Support	OPEN	Energy Transition Zone cohort programme	ETZ cohort companies (AJT, Apollo, Ashtead, DeepSea, Dron & Dickson, Elemental, Motive, Whittaker, QHSE)

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	What It Means for NES Firms	Priority	Timing
AR8 CfD supply chain slots	Tier 1 EPCIs finalising subcontractor LOIs for fabrication, cabling, foundations, blade logistics, port handling, O&M. ODOW category is new and less contested.	★★★★★	20 Jul – 7 Aug 2026
Caledonia 2 GW pre-construction	Ocean Winds Aberdeen team building 2027–29 pre-construction contracting cycle. Moray Firth cluster (East, West, Caledonia) offers rare consolidation.	★★★★★	2026–2029
Viking CCS Tier 1 EPCI subcontracting	FEED-to-execution transition. High-integrity CO_2 welds, subsea injection wells, COMAH QHSE, NDT, ESG advisory.	★★★★★	H2 2026 – FID 2027
Peak Cluster CO_2 pipeline	New CO_2 corridor into Morecambe Net Zero. Aberdeen subsea, fabrication, welding for East Irish Sea route.	★★★★	2026–2029
AF Gruppen 38,500 t topsides preparatory scope	Multi-year EPRD contract; subsea isolation, hydrocarbon cleaning, ROV, drop-object surveys, QHSE, well integrity.	★★★★	2026–2031 (offshore prep)
DeepOcean southern basin subsea decom follow-on	Successful Seven Seas / Grove West campaign proves tooling reuse model. Next campaign package likely awarded H2 2026.	★★★★	H2 2026
CB&I Kittiwake life-of-field subcontracting	Aberdeen Duty Holder wrap contract. Ideal for QHSE, integrity, welding, NDT, subsea inspection subcontractors.	★★★★	Q3 2026
NSTA carbon storage guidance advisory	Three new pieces of NSTA guidance create advisory revenue: site characterisation, monitoring plans, ESG reports.	★★★★	Now – Q4 2026
UK Hydrogen Backbone (2000+ km)	National Gas Transmission pipeline programme.	★★★★	2026–2030 concept
LDES pumped hydro construction pipeline	Northern Scotland (Earba, Coire Glas exp., Balliemeanoch). Civils, tunnelling, penstock, hazardous-area electrical.	★★★★	2027 construction start
Port of Tyne Clean Energy Park	MMO now lead regulator. Marine construction, dredging, quayside heavy lift, geotechnical, welding, QHSE from 2026-28.	★★★★	2026–2028
Ofgem OFTO Cost Assessment response	NES cable, subsea, offshore substation contractors should submit UK cost benchmark evidence.	★★★	Closes 7 Sep 2026
ScotWind SCDS conversion	Developers publishing multi-£bn commitments; Crown Estate Scotland pushing for enforceable conversion.	★★★	Now – Q4 2026

Opportunity	What It Means for NES Firms	Priority	Timing
AR8 tidal ringfence supply	MeyGen, Orbital, Nova bidding. Marine contractors, subsea installation, cable for bid supply chain plans.	★★★	20 Jul – 7 Aug 2026
Envision + Pulse Wolverhampton BESS EPC	Envision expanding UK integrator footprint. UK BESS containers, HV switchgear, DC/AC subcontracting.	★★★	H2 2026 – H1 2027
DESNZ Strategic Policy Guidance response	Shape network investment priorities for next CfD round.	★★★	Response by 19 Aug
GBE Supply Chain Fund Round 3	Grants for UK supply chain investment.	★★★	Closes 30 Sep 2026
Floating OW Conference (Aberdeen)	Priority NES networking event of Q3.	★★★	18–20 August 2026
CPH2 electrolyser licensing partners	Membrane-free electrolyser licensing model — UK manufacturing tie-ups may follow £7.3m raise.	★★	H2 2026
Orcadian offshore AI data centre concept	Gas-to-wire + CCS for offshore AI data centre — niche but strategic for stranded assets.	★★	2027+ concept

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