

UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 19 September 2026

Coverage Period	Audience	Classification
13 – 19 Sep 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 19 September 2026 delivered three defining transmission, community-power and North Sea supply-chain signals for NES Tier 2/3 companies.

On 14 September the Department for Energy Security and Net Zero granted the Development Consent Order for the Morgan and Morecambe Offshore Wind Farms Transmission Assets — covering offshore export cables, onshore landfall, onshore export cables, substations, grid connection cables and circuit-breaker compounds for the 1.5 GW Morgan and 480 MW Morecambe Irish Sea projects. Construction on Morecambe is scheduled for 2027 and the Crown Estate expects to select a preferred bidder for the re-tendered Morgan project by the end of 2026. The Order gives a five-year commencement window and a seven-year compulsory-acquisition window for Morecambe transmission assets, with Morgan transmission assets held pending a new lease.

On 15 September the Offshore Wind Growth Partnership £1 million 2026 Innovation Funding decision was formally circulated across the wider energy media — confirming that seven UK supply-chain firms will target the £209 billion global market opportunity in industrial foundations, substructures and electrical design.

On 17 September Great British Energy launched a £30 million People’s Power fund (sitting inside a wider up to £1 billion community-and-local-energy programme), taking the total number of new rooftop solar projects installed through GBE support for England’s Mayoral Combined Authorities to 157.

Hornbeck Offshore Services (Helix Well Ops UK subsidiary) was awarded a multi-year North Sea decommissioning contract by an unnamed major operator, commencing Q2 2027 for a firm two-year term with options to extend — riserless plug-and-abandonment work using the Well Enhancer or Seawell riserless intervention vessels bundled with subsea intervention lubricators, ROVs and saturation diving.

The Jackdaw ministerial decision remains paused ahead of the 8 October Holborn and St Pancras by-election (Guardian 11 September, confirmed status through the week).

On 15 September Kistos Energy reported an \$80.8 million H1 pre-tax profit as production more than doubled to 20,800 boepd — non-operated stakes sitting alongside Serica Energy at Greater Laggan Area and the Shell / Equinor Adura Victory field. Serica separately confirmed a Far East search for a Bruce infill-drilling rig (15 September) citing “there isn’t a rig in the UK that can drill the kind of wells that we need to drill” — OEUK data confirms UK content at 63% for oil and gas developments. Ineos will deploy Wales-based Empirisys AI barrier safety technology on the Forties Pipeline System from 2027 (17 September). Orsted confirmed on 18 September it plans to sell 50% of the £8.5 billion Hornsea 3 project. On 16 September Rolls-Royce SMR opened up to £1.4 billion of Gwyndod Power Station contracts to UK suppliers ahead of the 22–23 October Ynys Môn supplier conference.

Time-critical NES focus: CCGS 2026 London 22–23 September; GUH Autumn Members Meeting Aberdeen 24 September; GBE Supply Chain Fund Round 3 closes 30 September; NSTA Abandonment Fee Rules commence 30 September; Floating Offshore Wind Conference Aberdeen 7–8 October; Autumn Budget 28 October.

1. Offshore Wind — Fixed Bottom

Morgan and Morecambe Offshore Wind Farms Transmission Assets DCO granted (14 September 2026)

The Department for Energy Security and Net Zero on 14 September granted development consent for the Morgan and Morecambe Offshore Wind Farms Transmission Assets — the Order covers offshore export cables, onshore landfall infrastructure, onshore export cables, onshore substations, onshore grid connection cables, circuit-breaker compounds and other related onshore infrastructure. The transmission application was jointly submitted in October 2024 by Morgan Offshore Wind Limited and Morecambe Offshore Windfarm Limited and covers the 1.5 GW Morgan project in the Irish Sea and the 480 MW Morecambe project approximately 30 km off the Lancashire coast. Morgan (originally a joint venture between EnBW and JERA Nex BP) was discontinued in January 2026 after failing to secure a CfD in AR7; the Crown Estate is now re-tendering the site and expects to select a preferred bidder by the end of 2026. Morecambe (Copenhagen Offshore Partners on behalf of Copenhagen Infrastructure Partners) received its generation DCO in December 2025 and entered its Crown Estate lease in January 2026, with construction scheduled for 2027. The Order gives development a five-year commencement window and Morecambe compulsory-acquisition powers a seven-year window; all compulsory-acquisition powers for the Morgan transmission assets were removed and Morgan works are held pending a new lease and funding statement.

NES Sales Opportunity: The Morgan and Morecambe transmission DCO is the largest UK offshore-wind transmission consent of Q3 and opens the widest export-cable and substation supply-chain window of 2026. NES Tier 2/3 firms in HV subsea and onshore cable jointing, offshore export cable installation, landfall micro-tunnelling, substation civils, HV switchgear, circuit-breaker manufacture, structural steel (BHC), cathodic protection, coatings, mechanical fabrication and specialist QHSE should refresh accounts with Morecambe Offshore Windfarm Limited (Copenhagen Offshore Partners), National Grid Electricity Transmission and the Crown Estate Morgan-relet team immediately. Position against the 2027 Morecambe construction start and the Q4 2026 Morgan preferred-bidder announcement. Directly cross-sells into Berwick Bank, Ossian, Buchan and Hornsea 4 export-system procurement.

OWGP £1 million 2026 Innovation Funding — seven UK companies target £209bn global scope (15 September 2026)

The Offshore Wind Growth Partnership £1 million 2026 Innovation Funding decision (originally announced 8 September, widely reported 15 September by Energy Live News, oedigital.com and other trade press) confirms seven UK companies will target the £209 billion global market opportunity in industrial foundations, substructures, substations and electrical design identified in the UK Industrial Growth Plan. The recipients are: Acuity Robotics (Squirrel robotic inspection of transition pieces); Akselos (DfMA high-fidelity substructure design-for-manufacture framework); Crondall Energy (SafeMoor floating-wind mooring service); Fathom (Bayesian digital-twin module inside METHOD platform); Quocean (66 kV Q-Connect design-to-demo); Sperra Seaworks (low-cost, low-carbon concrete suction anchors); and T12 Engineering (mooring installation and maintenance tooling ecosystem). The programme is backed by Industry Champions Equinor and SSE with strategic sponsorship from the ORE Catapult, and the successful companies will progress to evidence-of-performance work with OWGP ahead of commercial deployment.

NES Sales Opportunity: OWGP-award-week feedback loops through 15 September clarify the specific UK Tier 2 integrator opportunities across the seven recipients. NES Tier 2/3 firms in concrete engineering, structural steel, high-integrity welding, cathodic protection, HV cable jointing, 66 kV connector manufacture, mooring hardware, digital-twin data engineering, offshore ROV robotics support, hazardous-area electrical and specialist QHSE should approach the seven OWGP recipients now with pre-commercial supply propositions. Cross-sell into Equinor UK, SSE Renewables, ORE Catapult and the Ossian / Berwick Bank / Green Volt / Buchan project procurement teams. This is a UK-visibility window for OWGP-adjacent NES fabrication, welding and controls specialists that will not repeat until 2027.

Orsted to sell 50% of £8.5 billion Hornsea 3 as part of restructuring (17–18 September 2026)

Orsted A/S announced on 17–18 September that it plans to sell 50% of the Hornsea 3 project (total project value stated by Orsted at £8.5 billion), with Bank of America Corp. and Crédit Agricole SA appointed to evaluate the transaction. The Hornsea 3 project sits within Orsted's wider restructuring programme launched in 2024. In October 2025 Brookfield agreed to acquire Orsted's stakes in four operating UK North Sea wind farms for £1.75 billion (\$2.2 billion). The Hornsea 3 CfD secured by Orsted in 2024 gave the project a 45% discount on part of the wind farm. The transaction announcement lands in the same week as favourable EU advisory-commission clarification of UK tax treatment for Orsted's British wind-farm portfolio, reinforcing the UK offshore wind investment climate.

NES Sales Opportunity: The Hornsea 3 partial-sale programme opens a new procurement re-alignment window at one of the UK's largest active offshore-wind construction programmes. NES Tier 2/3 firms across monopile transition-piece manufacture, HV subsea cable jointing, offshore substation civils and modules, cathodic protection, structural steel, high-integrity welding, coatings and specialist QHSE should refresh accounts with Orsted UK (Salamander project partner and Hornsea 3 lead) and remain positioned for the incoming 50% Hornsea 3 partner (announcement expected Q4 2026–Q1 2027). Directly cross-sells into Salamander, Hornsea 4 and other Orsted UK procurement scope.

2. Floating Offshore Wind

Ardersier / BW Ideol Damping Pool factory positioning — Highland job pipeline confirmed (15 September 2026)

Follow-through analysis this week from Energies Media (15 September) and Highlands and Islands Enterprise reinforces the £778,000 Scottish Government FEED grant to BW Ideol (announced 10 September) for the proposed Damping Pool® reinforced-concrete floating-wind foundation factory at the Port of Ardersier on the Moray Firth roughly 15 miles northeast of Inverness. The 18-month FEED study led by BW Ideol will validate an industrial facility using gantry slipforming and automated prefabrication to produce one foundation every 12 days from a single production line, translating to approximately 500 MW of annual capacity and around 1,200 direct jobs in the Highlands. Damping Pool® has been identified as the preferred floating foundation for the 1 GW Buchan Offshore Wind project (BW Ideol 33% / BayWa r.e. / Elicio). Further investment decisions, detailed engineering and commercial agreements are still required before facility commissioning.

NES Sales Opportunity: Ardersier positioning ahead of the 7–8 October Floating Offshore Wind Conference (P&J Live, Aberdeen) is the highest-value UK floating-wind supply-chain window of Q4. NES Tier 2/3 firms in concrete engineering, formwork, high-strength rebar, structural steel, automated prefabrication, precast concrete, cathodic protection, welding, HV electrical, coatings, marine warranty, mechanical fabrication, subsea moorings and specialist QHSE should book meetings this week with BW Ideol UK (Ardersier), BW

Ideol AS, BayWa r.e. UK, Elicio, HIE and Port of Ardersier. Cross-sell into future Damping Pool® contracts for Green Volt, Salamander, Ossian and international floating-wind pipelines.

UK floating-wind port pipeline — Aberdeen £25m MCR + Port Talbot £64m + Cromarty £55m

The 14–19 September window consolidates a UK floating-wind port investment portfolio building from three parallel commitments now on the record. Port of Aberdeen's £25 million South Harbour major-component-replacement facility (announced 7 September) positions Aberdeen as the primary O&M and heavy-lift service base for Green Volt (Cerulean Winds), Salamander (Simply Blue / Ørsted / Subsea7 100 MW off Peterhead), Buchan (BW Ideol / BayWa r.e. / Elicio 1 GW) and Ossian (SSE / Marubeni / CIP up to 3.6 GW). Alongside sit the £64 million UK Government commitment to Port Talbot (Celtic Sea floating hub, March 2026) and the £55 million Cromarty Firth floating investment (March 2025). Together the three port commitments give the UK a triangulated fixed-cost floating-wind delivery footprint ahead of AR8 Pot 3 award decisions.

NES Sales Opportunity: The Aberdeen / Port Talbot / Cromarty triangulated port investment gives NES Tier 2/3 firms a dual-coast serial procurement window across floating-wind MCR, mooring, dynamic array cable, monopile transition-piece, cathodic protection, structural steel, coatings, HV electrical and specialist QHSE scope. Refresh accounts with Port of Aberdeen (South Harbour MCR), Associated British Ports (Port Talbot), Port of Cromarty Firth, Cerulean Winds, Flotation Energy, SSE Renewables, Marubeni UK, CIP UK, Simply Blue Group, Ørsted UK, Subsea7 UK, BW Ideol, BayWa r.e. and Elicio ahead of the 7–8 October Floating Offshore Wind Conference (P&J Live) and Q4 AR8 procurement mobilisation.

3. Hydrogen

Hydrasun / Nel Aberdeen electrolyser build — continuing HAR2 anchor positioning

Follow-through analysis this week confirms that the £1.9 million Scottish Government funding package for the Hydrasun / Nel Aberdeen joint clean-technology facility (announced 10 September) remains the strongest UK electrolyser manufacturing supply-chain signal of 2026, building on the £1.97 million Just Transition Fund award (1 September) to establish Scotland's first electrolyser manufacturing capability in Aberdeen (2026–29). The programme anchors a UK electrolyser production node ahead of Department for Energy Security and Net Zero HAR2 electrolytic hydrogen contract awards later in 2026. Scottish HAR2 candidate sites include Sullom Voe (Veri Energy / EnQuest), Cromarty (ScottishPower / Storegga) and Grangemouth (Ineos). The Humber Hydrogen collective's £500 million UK hydrogen prioritisation call (7 September) continues as a market-shaping signal for cross-cluster hydrogen and CCS supply-chain positioning.

NES Sales Opportunity: The Hydrasun / Nel electrolyser anchor and the wider HAR2 procurement window sit at the top of the NES hydrogen supply-chain workbook for Q4 2026. NES Tier 2/3 firms in hazardous-area electrical, high-integrity welding, cryogenic systems, mechanical fabrication, coatings, integrated controls, cyber-secure SCADA, tooling and specialist QHSE should approach Hydrasun (Aberdeen) and Nel Hydrogen (Norway) procurement immediately. Direct cross-sell into HAR2 developers at Sullom Voe (Veri Energy / EnQuest), Cromarty (ScottishPower / Storegga) and Grangemouth (Ineos), plus the Humber Hydrogen collective.

Aberdeen City Council BP hydrogen JV withdrawal — alternative-developer selection window opens

Follow-through this week confirms Aberdeen City Council's move to withdraw from its Kittybrewster hydrogen hub joint venture with BP (announced 10 September) reshapes the Aberdeen Hydrogen Hub structure originally established in 2022. BP's broader strategic recalibration towards its international oil and gas portfolio (Brazil, Venezuela, Iraq) leaves the Kittybrewster site and associated hydrogen refuelling network under review, with

Aberdeen City Council expected to publish updated hydrogen strategy documentation in Q4 2026. The withdrawal follows the earlier collapse of the Aberdeen hydrogen bus fleet programme and creates a supply-chain reorganisation window for the hydrogen refuelling and green hydrogen production ecosystem in Aberdeen.

NES Sales Opportunity: The Aberdeen City / BP withdrawal signals a supply-chain reorganisation window with a clear Q4 2026 developer-selection decision point. NES Tier 2/3 firms with existing hydrogen refuelling, hydrogen production, HV electrical, hazardous-area electrical, cryogenic and integrated project engineering credentials should engage Aberdeen City Council hydrogen team early to inform alternative-developer selection. Priority repositioning: Hydrasun (Aberdeen), Progressive Energy, ScottishPower, Storegga and potential new hydrogen developer entrants. Direct cross-sell to Kittybrewster refuelling and green hydrogen production build-outs under revised commercial structure.

4. CCUS

CCGS 2026 London (22–23 September) — Track 1 / Track 2 positioning window

The Carbon Capture Global Summit 2026 (22–23 September, QEII Centre, London) sits at the front of the coming week and represents the highest-value UK CCUS positioning window before the Autumn Budget on 28 October. The North of England has been confirmed to dominate the CCSA carbon capture awards shortlist (Energy Voice 3 September) with East Coast Cluster and HyNet leading Track 1 delivery. Viking CCS (Harbour Energy) remains under active blueprint validation for Track 2. The Northern Endurance Partnership continues its 149 km subsea CO2 pipeline construction under Saipem, with NES-headquartered Sonardyne's environmental monitoring embedded across the offshore storage sites. Acorn Peterhead FID remains expected in the 2026 window subject to Storegga / ScottishPower / Shell commercial and consent progression.

NES Sales Opportunity: CCGS 2026 is the top-priority pre-Autumn Budget UK CCUS engagement window for NES Tier 2/3 firms. NES firms in HV electrical, hazardous-area electrical, cryogenic and CO2 handling, high-integrity welding, subsea environmental monitoring, coatings, mechanical fabrication, ROV inspection and specialist QHSE should book meetings at CCGS with Harbour Energy (Aberdeen), NEP (Endurance JV: BP, Equinor, TotalEnergies), Saipem UK, Sonardyne and the Storegga / ScottishPower Acorn CCS Peterhead team with combined Track 1 and Track 2 capability packs. Refresh CCSA membership visibility ahead of the shortlist announcements.

5. Marine & Tidal

UK tidal-stream supply chain — no new headline commercial event this week; AR8 Pot 4 lens

No new headline UK tidal-stream commercial event was published in the 13–19 September 2026 window. The MeyGen Pentland Firth tidal-stream array continues its operational programme under SAE Renewables and remains the largest UK operating tidal-stream project. The Wave Energy Scotland 2025–27 collaborative innovation programme continues its cycle across Mocean Energy, Verlume, AWS Ocean Energy and other developers. NESO AR8 qualification decisions for Pot 4 (marine energy) will follow the 16 September qualification-close checkpoint; the 7–8 October Floating Offshore Wind Conference at P&J Live remains the immediate co-location window for tidal-stream / floating-wind procurement conversations.

NES Sales Opportunity: NES Tier 2/3 firms with proven subsea, marine, coatings, cathodic protection, hydraulics, HV cabling, mooring, hazardous-area electrical, ROV and specialist QHSE credentials should refresh account plans for SAE Renewables (MeyGen), Orbital Marine Power (EMEC Orkney), Mocean Energy (Edinburgh), Verlume (Aberdeen), AWS Ocean Energy and Wave Energy Scotland. Pre-position for

AR8 Pot 4 marine energy CfD award pipeline and use the 7–8 October Floating Offshore Wind Conference for wave / tidal co-location scoping.

6. Geothermal

University of York FutureSource 4 km geothermal well — rig transit to campus (13–19 September)

Follow-through this week confirms the Drillemec Rig 65 (2,000 hp) transit from the Port of Immingham (arrival 1 September) to the University of York campus for the FutureSource 4 km deep-geothermal well. The FutureSource project is a first-of-a-kind UK deep-geothermal district-heating demonstration for higher-education campus decarbonisation, following the Eden Project deep-geothermal well at Cornwall. The wider UK deep-geothermal pipeline also continues to progress at United Downs (Geothermal Engineering Limited) near Redruth in Cornwall, which formally opened in February 2026 as the UK's first deep-geothermal power plant — the deepest well reached approximately 5.3 km underground, accessing water above 190°C. The scope establishes UK proof-of-concept for deep-drilling programmes into hot dry rock and hot sedimentary aquifer targets for district and industrial heat decarbonisation.

NES Sales Opportunity: The FutureSource York project extends the UK deep-geothermal pipeline and creates direct read-across for NES Tier 2/3 firms with proven North Sea deep-drilling, casing, cementing, wellbore integrity, mechanical fabrication, HV electrical, coatings and specialist QHSE credentials. Approach University of York FutureSource team, Drillemec UK, Eden Geothermal, Geothermal Engineering Limited (United Downs) and the broader UK deep-geothermal developer ecosystem (TownRock Energy, GeoScience) with capability slides referencing North Sea drilling transferable competencies for onshore deep-geothermal well construction.

7. Decommissioning

Hornbeck Offshore / Helix Well Ops UK wins multi-year North Sea decommissioning contract (14 September 2026)

Hornbeck Offshore Services announced on 14 September (widely reported 15–17 September) that its subsidiary Helix Well Ops (U.K.) Limited has been awarded a multi-year North Sea decommissioning contract by an unnamed major North Sea operator. The contract commences in Q2 2027 for a firm two-year term with customer options to extend. Scope covers riserless plug-and-abandonment operations using either the Well Enhancer or Seawell riserless well intervention vessels (RWIVs), bundled with the subsea intervention lubricator well-access system, ROVs, saturation diving, project management and engineering services. The award follows the Hornbeck / Helix merger — Hornbeck shareholders now own approximately 55% and Helix shareholders 45% of the combined company (Houston / Covington headquarters). Todd M. Hornbeck is President and CEO; William L. Transier is Chairman.

NES Sales Opportunity: The Hornbeck / Helix multi-year P&A contract is a Tier 1 anchor for the NES decommissioning supply chain into 2027–29. NES Tier 2/3 firms in subsea wellbore intervention, HV electrical, saturation diving support, ROV, marine warranty, mechanical fabrication, coatings, hazardous-area electrical, tooling, integrated logistics and specialist QHSE should refresh accounts with Helix Well Ops UK (Aberdeen), Hornbeck Offshore Services, Well Enhancer and Seawell vessel technical management, and Boskalis Decommissioning Collective. Directly aligns with the NSTA Abandonment Fee Rules commencing 30 September 2026 and the wider UKCS P&A workbook.

OEUK Economic Report 2026 — 63% UK content confirmed across oil-and-gas developments (14 September 2026)

Offshore Energies UK published its Economic Report 2026 on 14 September, confirming that UK content in the delivery of oil and gas developments covers 63% of work — described by OEUK as the highest use of local content among the industries it covers, ahead of offshore wind, carbon capture storage and hydrogen. The report frames UK operator concerns around the Energy Profits Levy (currently 78% headline tax rate), the planned replacement Oil and Gas Revenue Levy (40% base / 75% commodity-spike rate from March 2030), infrastructure supply and the wider North Sea supply-chain dependency risk. Serica Energy CEO Chris Cox separately confirmed on 15 September that Serica is looking to the “Far East” for a Bruce infill-drilling rig — the search launched in March and Serica was “in the process of contracting” in July — saying “there isn’t a rig in the UK that can drill the kind of wells that we need to drill.” The Bruce drilling campaign is scheduled for 2027.

NES Sales Opportunity: The OEUK 63% UK content data and Serica’s Far-East rig sourcing challenge are the two clearest pre-Autumn Budget policy signals for NES Tier 2/3 supply-chain positioning. NES firms should refresh accounts with Serica Energy (Aberdeen), OEUK members, Wood plc (Aberdeen), Petrofac, Aker Solutions, EnQuest and Ithaca Energy — combining capability packs referencing UK-based drilling, wells engineering, HV electrical, hazardous-area electrical, subsea intervention, mechanical fabrication, coatings and specialist QHSE. Use CCGS 2026, GUH Autumn Members Meeting and the 28 October Autumn Budget as immediate policy engagement windows on EPL, ORGL and local-content frameworks.

Kistos Energy H1 profit \$80.8m as production more than doubles — Adura Victory and Serica Bruce read-across (15 September 2026)

Kistos Energy on 15 September reported a \$80.8 million pre-tax profit for the first half of the year (reversing a \$6.9 million loss in the same period the previous year), with pro-forma production more than doubling to 20,800 boepd from 6,200 boepd in H1 2025. Pro-forma H1 revenues rose to \$290 million from \$87.9 million. The increase was attributed to Norwegian production trebling and new acquisitions in Oman. Full-year pro-forma production guidance is 19,000–21,000 boepd. Kistos owns non-operated stakes alongside Serica Energy at Greater Laggan Area (Serica now operator) and alongside the Shell / Equinor Adura joint venture at the Victory field (started by Shell). The King well from the Ringhorne platform started up in August 2026; the COSL Pioneer began drilling following Balder Phase V completion, with first oil scheduled for December 2026. The Balder Next New Wells project delivered a 120% reserves replacement ratio.

NES Sales Opportunity: The Kistos H1 result reinforces UKCS pump-up momentum for tiebacks to the Shetland Gas Plant and Adura Victory. NES Tier 2/3 firms in wells engineering, HV electrical, hazardous-area electrical, subsea intervention, ROV, high-integrity welding, coatings, mechanical fabrication and specialist QHSE should refresh accounts with Kistos Energy, Serica Energy (Aberdeen), Adura (Shell / Equinor JV), Shell UK, Equinor UK and Wood plc immediately. Cross-sell into COSL Pioneer drilling scope, Balder Next New Wells and future infill / third-party tieback opportunities at the Shetland Gas Plant.

8. Hydropower & Pumped Storage

Ofgem LDES Window 1 cap-and-floor autumn awards remain scheduled — Coire Glas / Loch Kemp / Earba anchor

Ofgem’s Long Duration Electricity Storage Window 1 process remains on track for final cap-and-floor awards in autumn 2026 (unchanged this week). The minded-to Window 1 portfolio (16 projects, 7,645 MW / 136.9 GWh) includes five Scottish pumped-storage hydro anchor projects: SSE Renewables Coire Glas 1,440 MW; Statera Loch Kemp 660 MW; Gilkes Earba 1,800 MW; plus two further schemes. Also on the list are 11 Li-ion BESS projects (including Field Rigifa 200 MW 18-hour), TeesCAES 50 MW compressed air, and Frontier Legacy 65 MW

vanadium/zinc flow. The Next Steps for Energy Storage forum was held on 17 September 2026 (Westminster). Coire Glas remains ready for construction following the earlier exploratory-tunnel completion; SSEN Transmission's Coire Glas Connection Project continues to progress in parallel. Post-award Q4 2026 procurement mobilisation windows will open across HV electrical, tunnelling, hydraulic engineering, coatings and specialist QHSE.

NES Sales Opportunity: The autumn Window 1 award announcement remains the single most consequential UK long-duration storage supply-chain event of 2026. NES firms in HV electrical, mechanical fabrication, tunnelling, hydraulic engineering, coatings and welding should confirm supply-chain LOIs now with SSE Renewables (Coire Glas), Statera (Loch Kemp) and Gilkes (Earba). Combined 3,900 MW Scottish pumped-storage anchor pipeline. Directly transferable to Field, Statera, Zenobe, TeesCAES and Frontier Li-ion / CAES / flow-battery BESS sub-contract scope.

9. Policy

GBE People's Power £30m community-energy launch — £1bn total UK community programme (17 September 2026)

Great British Energy on 17 September launched a £30 million People's Power fund enabling communities across the UK to build and control their own clean energy supply (solar panels on local buildings, village-owned wind farms and hydro schemes in nearby rivers). The launch sits inside a wider up to £1 billion community-and-local-energy programme announced earlier in 2026 targeting over 1,000 local and community-led clean-energy projects. GBE has already provided up to £16 million to England's Mayoral Combined Authorities — 157 new rooftop solar projects have been installed with up to £50 million in potential energy-bill savings. £1.8 million has been allocated to the Scottish Government's CAREs community energy programme, in addition to more than £10 million earlier in 2026. The launch includes a £20 million Community Fund (grants for community organisations across England, Wales and Northern Ireland) and a £5 million Partnerships Grant (Local Authorities and community energy partners). CEO Dan McGrail leads GBE; Community Energy England CEO Dr Matt Vickers welcomed the launch.

NES Sales Opportunity: The GBE People's Power fund is a new Q4 2026 UK-wide procurement window for NES Tier 2/3 firms with proven community-scale solar, wind, hydro, HV electrical, hazardous-area electrical, grid-connection engineering, mechanical fabrication, controls, cyber-secure SCADA and specialist QHSE credentials. Refresh accounts with Great British Energy (CEO Dan McGrail), Community Energy England (CEO Dr Matt Vickers), CAREs programme (Scottish Government), Mayoral Combined Authorities and community energy partners. Directly cross-sells into small-scale solar rooftop, community wind and river-hydro delivery. Applications open across the GBE Community Fund, Partnerships Grant and up to £2.9 million community advice services scope.

Jackdaw ministerial decision remains paused ahead of 8 October Holborn and St Pancras by-election

The Jackdaw gas-field decision remains paused this week, following the 11 September Guardian confirmation that the ministerial call is unlikely to be announced before the 8 October Holborn and St Pancras by-election. Energy Secretary Miatta Fahnbulleh had previously been widely expected to announce approval on 15 September but the decision was pulled from the immediate agenda ahead of party-conference season and the House of Commons recess. Any decision is understood to include Rosebank alongside Jackdaw — both projects have licences to operate but had their environmental approvals rescinded after a judge ruled that Shell and Equinor needed to account for downstream combustion emissions. Fahnbulleh gives the ministerial recommendation to the North Sea Transition Authority, which then issues formal approval. Adura (Shell / Equinor

JV) continues to target winter first gas for Jackdaw pending approval. Campaigners maintain that the Jackdaw and Rosebank fields could produce 10% of UK oil and gas output at their peak.

NES Sales Opportunity: The Jackdaw pause pushes Adura (Shell / Equinor) 40,000 boe/d peak-production mobilisation and supply-chain sub-contract windows into the Autumn Budget window (28 October) and Q1 2027. NES Tier 2/3 firms should hold procurement decisions with Adura, Shell UK, Equinor UK and Ithaca Energy on Jackdaw pre-development scope but continue to reposition capability packs for late-autumn approval. Cross-reference to Rosebank scope (Ithaca 20% stake) which faces separate delay. Priority scope: HV electrical, hazardous-area electrical, subsea intervention, ROV, marine warranty, mechanical fabrication, wells, drilling, coatings, cathodic protection and specialist QHSE.

Rolls-Royce SMR / GBE-N £1.4bn Gwyndod Power Station supply-chain window (16 September 2026)

Rolls-Royce SMR and Great British Energy – Nuclear (GBE-N) launched a new supplier programme on 16 September for the Gwyndod Power Station at the former Wylfa Newydd site on Ynys Môn (Anglesey), north Wales — unlocking up to £1.4 billion in contract opportunities for UK businesses over the next year. Three Rolls-Royce Small Modular Reactors are initially planned, with potential for further site development; the target UK-supply-chain content is more than 70%. Up to 3,000 jobs could be supported in north Wales and up to 8,000 jobs across the UK. Since Rolls-Royce SMR was formed in 2021 the company has spent more than £300 million with UK-based suppliers (88% of total spending) and has formally engaged more than 650 businesses. Sheffield Forgemasters is assessing UK-forged component supply. The joint Rolls-Royce SMR / GBE-N supplier conference on Ynys Môn is scheduled for 22–23 October 2026. The UK Government has committed more than £2.5 billion to the SMR programme.

NES Sales Opportunity: The £1.4 billion Gwyndod SMR supplier window is a new adjacency for NES Tier 2/3 firms with proven nuclear-grade or offshore-transferable HV electrical, hazardous-area electrical, forging, high-integrity welding, structural steel (BHC), mechanical fabrication, coatings, ROV, integrated project management and specialist QHSE credentials. Refresh accounts with Rolls-Royce SMR (Derby), GBE-N and register for the 22–23 October 2026 Ynys Môn supplier conference. Directly cross-sells into North Sea forging (Sheffield Forgemasters) and wider UK new-build nuclear supply-chain positioning. First direct UK Rolls-Royce SMR contracts expected within the next 12 months.

Ineos Forties Pipeline System AI barrier safety technology contract to Empirisys (17 September 2026)

Energy Voice reported on 17 September that Ineos will deploy barrier safety technology developed by Wales-based (Aberdeen-office) technology firm Empirisys on the Forties Pipeline System. Empirisys has been appointed to deliver the first phase of Ineos' barrier model project on FPS, which combines operational and process safety data to improve understanding of operational risks. The technology is set to come into use in 2027. Ineos CEO for FPS Andrew Gardner previously stated that the FPS could operate until “2040 or beyond”, with FPS process safety and risk lead Tom Downie leading operational delivery. Empirisys previously worked with Step Change in Safety on an automated observation system powered by its Boost AI. Anasuria Operating Company has already adopted similar technology for its North Sea oil and gas activity. Empirisys CEO Gus Carroll said the project will have a material impact on the company's annual performance and may lead to further similar projects.

NES Sales Opportunity: The FPS Empirisys contract is a new Aberdeen-office AI-safety adjacency for NES Tier 2/3 firms with proven process-safety, operational-safety, controls, cyber-secure SCADA, integrated project engineering and digital-twin credentials. Refresh accounts with Ineos FPS (Aberdeen / Grangemouth), Empirisys (Aberdeen), Anasuria Operating Company, Step Change in Safety and the wider North Sea pipeline / topside barrier-safety supply-chain ecosystem. Cross-sell into wider decommissioning,

CCUS injection, hydrogen refuelling and grid-connection safety-critical scope where Empirisys / AI barrier-model reference architecture applies.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
22–23 Sep 2026	Carbon Capture Global Summit 2026 (CCGS)	QEI Centre, London	Track 1/2 CCUS positioning
24 Sep 2026	Global Underwater Hub Autumn Members Meeting	Aberdeen	Subsea R&D engagement
30 Sep 2026	GBE Supply Chain Fund Round 3 closes	National (application)	NES Tier 2/3 grant scope
30 Sep 2026	NSTA Abandonment Fee Rules commence	UKCS	Decommissioning liability shift
1 Oct 2026	Ofgem energy price cap +4% effective	National	Industrial and commercial impact
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 (Jackdaw / Rosebank political trigger)	London	Ministerial decision unlock
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)	Ynys Môn, Wales	SMR supply-chain scope
28 Oct 2026	Autumn Budget 2026	Westminster	Fiscal / CfD / EPL policy
4–5 Nov 2026	Global Offshore Wind Investment Forum	London	CIP / Marubeni / SSE capital
10 Nov 2026	Botley West 840 MW solar decision (extended)	DESNZ / London	Large solar precedent
Late Nov 2026	AR8 CfD Contract Budget Notice (DESNZ)	National	Pot 1/2/3 CAPEX release
Autumn 2026	Ofgem LDES Window 1 cap-and-floor awards	National	Coire Glas, Loch Kemp, Earba
End 2026	Crown Estate Morgan re-tender preferred bidder	National	Irish Sea 1.5 GW pipeline
Q2 2027	Hornbeck / Helix Well Ops UK North Sea P&A start	UKCS	Multi-year decommissioning

11. Grant Funding & Support Mechanisms Active This Week

Mechanism	Amount / Scope	Deadline	Relevance to NES
GBE Supply Chain Fund Round 3	£50m+ offshore wind supply chain	30 Sep 2026	NES Tier 2/3 fab, HV, coatings
GBE People's Power (community energy)	£30m of up to £1bn programme	Live 17 Sep 2026	Community solar / wind / hydro
GBE Community Fund	£20m grants (Eng, Wal, NI)	Open (from 17 Sep)	Small-scale clean energy build
GBE Partnerships Grant	£5m LA and community	Open (from 17 Sep)	Local Authority JV projects
OWGP 2026 Innovation Funding (post-award)	£1m across 7 UK firms	Awarded 8 Sep (widely reported 15 Sep)	Tier 2/3 integrator scope
Just Transition Fund NE & Moray 2026	£17.5m across 22 projects	Awarded 1 & 10 Sep 2026	Hydrasun, Marine Devs, ORE Catapult
HIE Buchan / Ardersier FEED grant	£778k BW Ideal Damping Pool®	Awarded 10 Sep 2026	1,200 Highland direct jobs
HAR2 Electrolytic Hydrogen (DESNZ)	HPBM Contracts for Difference	Awards H2 2026	Hydrasun / Nel / HAR2 sites
CCUS Track 1 (HyNet / East Coast Cluster)	HPBM + CfD scope	Ongoing 2026–28	Sonardyne / Saipem UK / Harbour
CCUS Track 2 (Viking, Acorn Peterhead)	FID gates in 2026 window	Rolling	Viking blueprint validation
Ofgem LDES Cap-and-Floor Window 1	7,645 MW / 136.9 GWh (16 projects)	Autumn 2026 awards	Coire Glas, Loch Kemp, Earba
NSTA Abandonment Fee Rules	Commencement 30 Sep 2026	Rules effective	Decommissioning liability shift
Rolls-Royce SMR / GBE-N Gwyndod	Up to £1.4bn contracts (12 months)	22–23 Oct 2026 supplier conf	SMR forging / HV / civils
Wave Energy Scotland Collaborative Innovation	2025–27 programme	Rolling	Marine / tidal supply chain
ORE Catapult Large Scale Synthetic Mooring Line Test Rig	£4m JTF award (2026–28)	Construction underway	Floating wind mooring test scope
Port of Aberdeen £25m MCR facility	£25m South Harbour scope	Development phase	Floating wind O&M anchor

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
Morgan & Morecambe Transmission Assets DCO (14 Sep)	1.5 GW Morgan + 480 MW Morecambe Irish Sea projects. Offshore export cables, landfall, onshore export cables, substations, grid connection, circuit-breaker compounds. Morecambe construction 2027. Morgan preferred bidder by end 2026.	★★★★★	Q3–Q4 2026
Hornbeck / Helix Well Ops UK multi-year P&A contract (14 Sep)	Riserless P&A using Well Enhancer or Seawell RWIVs; SIL well access, ROVs, saturation diving, engineering. Firm two-year term with extension options. Commences Q2 2027.	★★★★★	Approach Q4 2026
Port of Ardersier BW Ideol serial concrete floating foundations	£778k HIE FEED grant (10 Sep). One foundation every 12 days, 500 MW/year, 1,200 Highland jobs. Preferred foundation for 1 GW Buchan (BW Ideol 33% / BayWa r.e. / Elicio). Damping Pool® serial construction methodology.	★★★★★	Approach Q3 2026
Port of Aberdeen £25m South Harbour MCR facility	£25m major-component-replacement facility for floating wind O&M. Anchor for Green Volt, Salamander, Buchan, Ossian. Heavy lift, marine warranty, structural steel, HV electrical, mechanical fabrication.	★★★★★	Approach Q3 2026
Hydrasun / Nel Aberdeen electrolyser facility £1.9m + £1.97m JTF	Scotland's first electrolyser manufacturing capability. Anchor UK electrolyser node ahead of HAR2 award. Hazardous-area electrical, high-integrity welding, cryogenic, coatings, cyber-secure SCADA.	★★★★★	Approach Q3 2026
OWGP 2026 Innovation Funding (7 awarded firms)	Sperra Seaworks concrete suction anchors; Crondall SafeMoor mooring; Quoceant 66 kV connectors; Akseles DfMA; Fathom digital twin; T12 mooring tooling; Acuity Robotics inspection. £1m targeting £209bn market opportunity.	★★★★★	Approach Q3 2026
GBE People's Power £30m community energy launch (17 Sep)	Up to £1bn programme, 1,000+ projects UK-wide. Community solar, village wind, hydro. £20m Community Fund + £5m Partnerships Grant. 157 rooftop solar installed to date.	★★★★★	Q4 2026 open
Orsted 50% Hornsea 3 sale (£8.5bn project value, 17–18 Sep)	Restructuring programme. BofA and Crédit Agricole appointed. Cross-sells into Salamander and Hornsea 4. Refresh Orsted UK accounts ahead of Q4/Q1 partner announcement.	★★★★★	Q4 2026–Q1 2027
Rolls-Royce SMR / GBE-N Gwyndod £1.4bn window (16 Sep)	Three SMRs at Wylfa Newydd site (Ynys Môn). 70%+ UK content target. 3,000 north Wales jobs, 8,000 UK jobs. Supplier conf 22–23 Oct. Sheffield Forgemasters engaged.	★★★★★	Q4 2026
Ineos FPS Empirisys AI barrier safety contract (17 Sep)	First phase of Ineos barrier model project. Deployment in 2027. FPS could run to 2040+. Aberdeen-office AI safety adjacency. Cross-sells into CCUS, hydrogen, decommissioning.	★★★★★	Q4 2026

Opportunity	Details	Rating	Action Window
Kistos Energy H1 \$80.8m profit — Adura Victory / Bruce tiebacks (15 Sep)	Production 20,800 boepd (up from 6,200). COSL Pioneer drilling; first oil Dec 2026. Balder Next New Wells 120% reserves replacement. Non-operated stakes with Serica and Adura.	★★★★	Q4 2026
Serica Bruce infill-drilling rig — UK-content sourcing (15 Sep)	CEO Chris Cox: no UK rig can drill required Bruce wells. Rig sourced from “Far East” for 2027 campaign. Windfall tax 78% → ORGL 40% base / 75% spike from March 2030.	★★★★	Q4 2026
OEUK Economic Report 2026 — 63% UK content (14 Sep)	Highest local content of any UK energy sector. Cross-benchmark for offshore wind, CCS, hydrogen. Pre-Budget policy positioning window.	★★★★	Pre 28 Oct
Ossian ScotWind 3.6 GW cable and array procurement	SSE / Marubeni / CIP JV, 260-mile cable survey complete. Consent submitted for 265 turbines 52 miles off Aberdeenshire. HV subsea cable, dynamic array, mooring, coatings, ROV.	★★★★★	AR8 window
Salamander INTOG 100 MW off Peterhead — site survey complete	Simply Blue / Ørsted / Subsea7 JV, 21 miles off Peterhead. Design and O&M supply chain now moving. Cross-sells into Ørsted UK Hornsea 3 workbook.	★★★★	AR8 window
Buchan Offshore Wind 1 GW project (BW Ideol / BayWa r.e. / Elicio)	Onshore consent secured, Ardersier serial foundation manufacturing FEED underway. First deployment of Damping Pool® at scale.	★★★★★	Approach Q3 2026
EnQuest interest in bp UK North Sea portfolio (c.£2.5bn)	CEO Bseisu confirmed interest (Sep). Any transaction triggers portfolio-wide supply-chain re-tendering. All UKCS engineering, HV, subsea, wells.	★★★★	Q4 2026 window
SSE plc £29bn RIIO-T3 SSN Transmission (Aberdeen)	Eastern Green Link 2, Netherton Hub, Coire Glas 1,440 MW pumped storage, Beauldy-Denny reinforcement. £150m Thainstone training centre.	★★★★★	Q3–Q4 2026
Viking CCS blueprint validation (Harbour Energy) + Sonardyne / NEP monitoring	Viking Track 2 pathway UK blueprint. Sonardyne subsea monitoring embedded in NEP construction. CCGS 22–23 Sep positioning window.	★★★★	FID gates 2026
Ofgem LDES Window 1 autumn cap-and-floor awards	7,645 MW / 136.9 GWh (16 projects). Coire Glas 1,440 MW, Loch Kemp 660 MW, Gilkes Earba 1,800 MW. HV electrical, tunnelling, hydraulic engineering, coatings.	★★★★★	Autumn awards
Jackdaw ministerial decision remains paused	Adura (Shell / Equinor) 40,000 boe/d peak production delayed. Supply-chain mobilisation into Autumn Budget / Q1 2027. Wells, HV electrical, subsea, marine, ROV.	★★★	Post 8 Oct 2026

Opportunity	Details	Rating	Action Window
University of York FutureSource 4 km geothermal well	Drillmec Rig 65 transit from Immingham to York campus. First-of-a-kind UK deep-geothermal district heating. Deep-drilling, casing, cementing scope.	★★★	Q4 2026

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