

UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 12 September 2026

Coverage Period	Audience	Classification
6 – 12 Sep 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 12 September 2026 delivered three defining NES supply-chain signals and a decisive policy reversal on Jackdaw. On 10 September Highlands and Islands Enterprise confirmed a £778,000 Scottish Government grant to BW Ideol for an 18-month front-end engineering design study for serial production of Damping Pool® concrete floating-wind foundations at the Port of Ardersier — one foundation every 12 days, approximately 500 MW of annual capacity, up to 1,200 direct jobs in the Highlands, and preferred foundation for the 1 GW Buchan Offshore Wind project (BW Ideol 33% / BayWa r.e. / Elicio). The same day the Scottish Government confirmed a £17.5 million Just Transition Fund investment across the North East and Moray supporting 22 projects (7 commercial, 15 community) with First Minister John Swinney announcing the package during a visit to Hydrasun in Aberdeen, alongside a further £1.9 million backing for a joint Hydrasun / Nel electrolyser manufacturing facility.

On 11 September Reuters reported that the UK Government has now postponed the Jackdaw gas field decision until after the 8 October Holborn and St Pancras by-election — pushing the ministerial announcement into late autumn. This directly reverses the mid-September approval expectation reported the previous week and moves the associated 40,000 boe/d peak production start-up window and Adura (Shell/Equinor JV) supply-chain mobilisation into the Autumn Budget window.

On 8 September the Offshore Wind Growth Partnership announced its 2026 Innovation Funding awards — seven UK companies including Sperra Seaworks, Crondall Energy, Quoceant, Akselos, Fathom, T12 Engineering and Acuity Robotics sharing a £1 million pot targeting industrial foundations, substructures, substations and electrical design (a potential £209 billion global market opportunity).

The Port of Aberdeen on 7 September announced a £25 million major-component-replacement (MCR) facility at South Harbour for floating offshore wind, and DNV published a report showing turbine standardisation and predictable pipelines could cut North Sea offshore wind LCoE by up to 28% by 2050. Wood plc formally returned to family ownership on 9 September under Sidara. Nexos Group unified its consulting, engineering and delivery brands under a single identity on 8 September. Aberdeen City Council on 10 September moved to withdraw from its BP hydrogen hub joint venture. On 10 September the University of York’s FutureSource 4 km geothermal Drillmec Rig 65 arrived in the UK. On 11 September Orsted received a favourable EU advisory-commission ruling on UK offshore wind farm taxation.

Time-critical NES focus: NESO AR8 qualification closes 16 September; CCGS 2026 London 22–23 September; GBE Supply Chain Fund Round 3 closes 30 September; Floating Offshore Wind Conference Aberdeen 7–8 October; Ithaca Energy FTSE 100 promotion effective 21 September; Autumn Budget 28 October.

1. Offshore Wind — Fixed Bottom

DNV report: turbine standardisation could cut North Sea offshore wind LCoE by 25–28% (8 September 2026)

DNV published on 8 September a new study developed with eight European offshore wind supply-chain companies concluding that standardising turbine designs and securing predictable, investable project pipelines could deliver up to 28% LCoE reduction by 2050 across the North Sea offshore wind industry — with 14% by 2035 for longer production runs and 19% by 2035 for sustained deployment. The reference platform is around 15 MW on monopile foundations, though DNV explicitly did not identify 15 MW as the optimum future turbine size. Most savings come from lower CAPEX, plus installation and substructure costs. The report warns that ports and installation capacity approach their limits in the high-volume deployment scenario needed to hit the UK's Clean Power 2030 target of a minimum 43 GW offshore wind, requiring port expansion and selected upgrades. DNV CEO for Energy Systems Ditlev Engel called for firm delivery as the most important KPI for reducing costs.

NES Sales Opportunity: The DNV report is the strongest supply-chain positioning signal of Q3 for NES Tier 2/3 firms. The port and installation capacity bottleneck is the exact scope where NES ports (Port of Aberdeen South Harbour MCR facility, Buckie, Peterhead, Nigg, Global Energy Group) and NES firms in fabrication, monopile transition-piece manufacture, HV electrical, cable jointing, welding, coatings, structural steel, mechanical fabrication and specialist QHSE can lock in visible five-to-ten year work windows. Approach SSE Renewables, Equinor UK, Vattenfall UK, RWE, Ossian JV, Berwick Bank / Seagreen procurement teams with capability slides referencing serial production, longer production runs, firm delivery windows and repeatable manufacturing.

Port of Aberdeen commits £25 million to South Harbour floating wind MCR facility (7 September 2026)

Energy Voice reported on 7 September that Port of Aberdeen (trust port) will develop a major-component-replacement (MCR) facility at South Harbour with a stated £25 million capital investment. The facility positions Aberdeen as the primary O&M and heavy-lift service base for the operational floating offshore wind fleet expected from Green Volt (Cerulean Winds), Salamander (Simply Blue / Ørsted / Subsea7 100 MW off Peterhead), Buchan Offshore Wind (BW Ideol / BayWa r.e. / Elicio 1 GW), and Ossian (SSE / Marubeni / CIP up to 3.6 GW). The South Harbour scope is the eastern deep-water quay complex delivered under the £420 million Aberdeen Harbour Expansion Project. The MCR facility development follows the same trust-port investment model that unlocked Global Energy Group's Nigg Energy Park fabrication ramp-up.

NES Sales Opportunity: Port of Aberdeen's £25 million MCR facility is a Tier 1 O&M scope anchor for NES Tier 2/3 firms across heavy lift, marine warranty, structural steel, HV electrical, mechanical fabrication, coatings, cathodic protection, ROV, integrated logistics and specialist QHSE. Approach Port of Aberdeen procurement (Aberdeen) immediately; refresh capability packs referencing floating wind MCR turnaround windows (12-day slot cycles cited by BW Ideol and DNV), major-component transport, heavy-lift jacking and dry-dock condition monitoring. Directly cross-sells into Green Volt, Salamander, Buchan and Ossian O&M frameworks.

OWGP Innovation Funding: seven UK companies awarded £1m share for offshore-wind foundations and electrical scope (8 September 2026)

The Offshore Wind Growth Partnership announced on 8 September the awards of its 2026 Innovation Funding programme, backing seven UK companies across two priority workstreams identified in the Industrial Growth Plan — industrial foundations and substructures (a potential £209 billion global market opportunity) and substations and electrical design. The companies (based across Scotland, North England and South England) are: Acuity Robotics (Squirrel remote robotic inspection of transition pieces); Akselos (DfMA high-fidelity design-for-

manufacture optimisation framework for UK offshore-wind substructures); Crondall Energy (SafeMoor service build-out); Fathom (Bayesian model updating module within METHOD physics-based digital-twin platform); Quoceant (66 kV Q-Connect design-to-demo); Sperra Seaworks (low-cost, low-carbon concrete suction anchor for UK floating offshore wind); and T12 Engineering (floating mooring system with installation and maintenance tooling ecosystem). Programme backed by Industry Champions Equinor and SSE.

NES Sales Opportunity: The OWGP awards are a decisive signal that the UK Industrial Growth Plan for offshore wind is now moving into demonstration and near-market deployment. NES firms should approach the seven awarded companies as immediate supply-chain integrators for foundations, monopile transition pieces, concrete suction anchors, 66 kV connectors, mooring systems, floating platform tooling and digital twins. Priority sub-scope: hazardous-area electrical, high-integrity welding, structural steel, coatings, cyber-secure controls, HV cable jointing and specialist QHSE. Cross-sell into Equinor UK, SSE Renewables and the Ossian, Berwick Bank, Green Volt and Buchan project teams.

Ossian ScotWind and Salamander INTOG complete survey campaigns — Xoccean 260-mile route, 100 MW off Peterhead (9 September 2026)

Energy Voice reported on 9 September the completion of two major Scottish offshore-wind survey campaigns. Ossian (SSE / Marubeni / Copenhagen Infrastructure Partners), a floating offshore wind farm of up to 3.6 GW capacity and 265 turbines 52 miles off the Aberdeenshire coast, has completed a 13-month geophysical survey of its 260-mile cable export route in the North Sea. Irish geophysical firm Xoccean deployed six uncrewed survey vessels through 11 named storms. Ossian has submitted its offshore array consent application to the Scottish Government; the project will connect via 400 kV grid substations at Lincolnshire Connection Node and Weston Marsh. Salamander (Simply Blue Group / Ørsted / Subsea7) has concluded its site survey 21 miles off Peterhead — a 100 MW floating INTOG development connected to a 100 MW onshore battery, using two SEAWATCH lidar buoys and one Wavescan buoy since October 2023.

NES Sales Opportunity: Ossian and Salamander are now the two most immediate NES-directly-served floating offshore wind procurement pipelines. NES firms in HV subsea cabling, dynamic array cable, floating mooring, monopile transition-piece manufacture, coatings, cathodic protection, mechanical fabrication, ROV inspection and specialist QHSE should approach SSE Renewables (Perth), Marubeni UK, CIP UK, Simply Blue Group, Ørsted UK, Subsea7 UK and BayWa r.e. procurement immediately. Peterhead / Aberdeen / Ardersier dual-port positioning differentiates supply-chain bids into subsequent AR8 Pot 3 (floating) and Pot 2 (fixed-bottom) rounds.

2. Floating Offshore Wind

Port of Ardersier funded to become UK's serial-production hub for BW Ideol concrete floating foundations (10 September 2026)

Highlands and Islands Enterprise announced on 10 September the approval of a Scottish Government grant of over £778,000 to BW Ideol for an 18-month front-end engineering design (FEED) study for an industrial facility at the Port of Ardersier for the serial production of Damping Pool® concrete floating offshore wind foundations. The Damping Pool® design is optimised for serial construction using gantry slipforming and automated prefabrication techniques. The proposed facility would deliver one foundation every 12 days from a single production line, translating to approximately 500 MW of annual capacity. The 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), which has already secured its onshore consent. The facility could create around 1,200 direct jobs in the Highlands and catalyse a broader regional supply chain.

NES Sales Opportunity: This is the single most consequential NES-adjacent floating offshore wind supply-chain announcement of 2026. NES Tier 2/3 firms in concrete engineering, formwork, high-strength rebar, structural steel (BHC), automated prefabrication, precast concrete, cathodic protection, welding, HV electrical, coatings, marine warranty, mechanical fabrication, subsea moorings and specialist QHSE should approach BW Ideol UK (Ardersier), BW Ideol AS (France), BayWa r.e. UK, Elicio, HIE and Port of Ardersier immediately. Cross-sell into future Damping Pool® contracts for Green Volt, Salamander, Ossian and international floating wind pipelines. Position now for 2027–29 first-line commissioning.

Aberdeen positioning ahead of Floating Offshore Wind Conference 7–8 October 2026 (P&J Live)

The Buchan / Ardersier and Port of Aberdeen MCR announcements this week directly position Aberdeen and the wider North East supply chain for the RenewableUK Floating Offshore Wind Conference (P&J Live, Aberdeen, 7–8 October 2026). The combined £25 million Aberdeen MCR facility, £778,000 Ardersier FEED, Buchan 1 GW onshore consent, Salamander 100 MW site survey completion and Ossian 3.6 GW 260-mile cable survey completion give NES supply-chain firms four active project frameworks ahead of Q4 procurement. The Green Volt project (Cerulean Winds) continues to progress towards AR8 with SSE Renewables and Flotation Energy jointly developing further ScotWind INTOG capacity.

NES Sales Opportunity: The 7–8 October Floating Offshore Wind Conference is the highest-value NES sales-window of Q4. NES Tier 2/3 firms should book meetings this week with SSE Renewables (Perth), Marubeni UK, CIP UK, Simply Blue Group, Ørsted UK, Subsea7 UK, BW Ideol, BayWa r.e., Elicio, Flotation Energy, Cerulean Winds and the Buchan / Ossian / Salamander project teams. Refresh capability packs specifically referencing serial concrete foundation manufacture, subsea moorings, dynamic array cable, HV substation civils, floating monopile transition pieces and MCR turnaround.

3. Hydrogen

Hydrasun / Nel Aberdeen electrolyser facility receives further £1.9m Scottish Government backing (10 September 2026)

First Minister John Swinney confirmed on 10 September a Scottish Government funding package of £1.9 million to Hydrasun and Norwegian electrolyser OEM Nel Hydrogen for the new joint clean-technology facility in Aberdeen. The commitment builds directly on the £1.97 million Just Transition Fund award to Hydrasun (1 September) to establish Scotland's first electrolyser manufacturing capability in Aberdeen (2026–29). Swinney visited Hydrasun's Aberdeen premises to make the announcement, claiming the facility will put Aberdeen "at the forefront of the energy transition". The Hydrasun / Nel partnership positions Aberdeen as an anchor UK electrolyser production node ahead of Department for Energy Security and Net Zero HAR2 electrolytic hydrogen contract awards later in 2026, with Scottish HAR2 candidate sites including Sullom Voe (Veri Energy / EnQuest), Cromarty (ScottishPower / Storegga) and Grangemouth (Ineos).

NES Sales Opportunity: This is the second major NES-directly-relevant hydrogen manufacturing announcement in successive weeks. 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. Combined with the Just Transition Fund £1.97m from Q3, this is the strongest UK electrolyser manufacturing supply-chain signal of 2026. Direct cross-sell into HAR2 developers at Sullom Voe (Veri Energy / EnQuest), Cromarty (ScottishPower / Storegga) and Grangemouth (Ineos).

Aberdeen City Council moves to withdraw from BP hydrogen hub joint venture (10 September 2026)

Energy Voice reported on 10 September that Aberdeen City Council is set to withdraw from its hydrogen hub joint venture with BP — a decision that reshapes the Aberdeen Hydrogen Hub structure originally established in 2022 to develop a green hydrogen production plant and refuelling infrastructure at Kittybrewster. The withdrawal follows BP's broader UK strategic recalibration towards its international oil and gas portfolio (Brazil, Venezuela, Iraq). Alternative development pathways for the Kittybrewster site and associated hydrogen refuelling network are under review, with the Council expected to publish updated hydrogen strategy documentation in Q4 2026. The withdrawal 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. 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 the Q4 2026 alternative-developer selection process. 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.

Humber Hydrogen calls for £500m UK hydrogen prioritisation — 4,000 jobs (7 September 2026)

Energy Voice reported on 7 September that the Humber Hydrogen collective of companies has formally called on the UK Government for £500 million of hydrogen prioritisation funding, arguing that it would preserve up to 4,000 jobs and make the Humber the UK's first integrated hydrogen network. The proposal covers hydrogen production, distribution pipeline, storage and industrial offtake integration — sitting alongside the East Coast Cluster and Viking CCS pathways. The proposal directly complements the HAR2 electrolytic hydrogen contract awards expected in 2026 and reinforces the UK Government position that industrial cluster hydrogen production and CCS remain the core Clean Power 2030 and Autumn Budget scope.

NES Sales Opportunity: The Humber Hydrogen £500m proposal is a market-shaping signal for NES firms with cross-cluster hydrogen and CCS credentials. NES Tier 2/3 firms in HV electrical, hazardous-area electrical, cryogenic systems, welding, coatings, integrated project engineering, cyber-secure controls, ROV and specialist QHSE should approach Humber Hydrogen collective members, Track 1 East Coast Cluster (Equinor, BP, TotalEnergies) and Viking CCS (Harbour Energy) with dual-cluster capability slides. Directly cross-sells into HAR2 and CCS Chain 3 procurement decisions.

4. CCUS

Viking CCS study endorsed as UK “blueprint” — Harbour Energy leads (7 September 2026)

Energy Voice reported on 7 September that a new independent study concluded the Viking CCS project offers a potential UK “blueprint” for the Track 2 CCUS cluster pathway. The study was welcomed by Viking lead developer Harbour Energy, which has publicly reaffirmed its intent to move Viking CCS to a final investment decision in the 2026 window subject to development consent. Viking CCS proposes onshore CO₂ capture, gathering pipeline and offshore transport to depleted southern North Sea gas fields. Alongside Viking, the Northern Endurance Partnership continued its offshore CO₂ pipeline construction under Saipem-led contract (149 km subsea CO₂ pipeline). NEP's 2 September construction update names Sonardyne environmental monitoring at its offshore carbon storage sites, directly connecting a NES-headquartered specialist subsea supplier to the largest UK CCS delivery programme.

NES Sales Opportunity: The Viking CCS blueprint validation and the Sonardyne / NEP framework are directly transferable references. NES Tier 2/3 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 approach 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. Acorn Peterhead FID remains expected in 2026.

5. Marine & Tidal

MeyGen and UK tidal-stream supply chain — no headline commercial event this week

No headline UK tidal-stream commercial event was published in the 6–12 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 collaborative innovation programme continues its 2025–27 delivery cycle across Mocean Energy, Verlume, AWS Ocean Energy and other developers. Watching brief for the 7–8 October Floating Offshore Wind Conference (P&J Live) for tidal-stream co-location procurement announcements and for NESO AR8 Pot 4 (marine energy) qualification decisions post-16 September.

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 7–8 October Floating Offshore Wind Conference co-location scope.

6. Geothermal

University of York FutureSource 4 km geothermal Drillmec Rig 65 arrives at Immingham (10 September 2026)

The University of York confirmed on 10 September that the powerful Drillmec Rig 65 (2,000 hp) is en route to the UK to drill a 4 km deep geothermal well at the University of York campus, accelerating the city's Net Zero ambitions. The rig arrived at the Port of Immingham on 1 September and is scheduled to move to the University of York site for drilling operations later in September. The FutureSource geothermal 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 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 established by Eden 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, Drillmec UK (via Immingham), Eden Geothermal and the broader UK deep-geothermal developer ecosystem (GEL, TownRock Energy, GeoScience) with capability slides referencing North Sea drilling transferable competencies for onshore deep-geothermal well construction.

7. Decommissioning

Sonardyne subsea monitoring embedded in Northern Endurance Partnership construction programme (6 September 2026)

A 6 September industry analysis notes that Sonardyne's environmental monitoring technology is now formally embedded in the Northern Endurance Partnership offshore construction programme, following NEP's 2 September construction update naming Sonardyne alongside offshore work at the Endurance carbon storage site. The reference connects a specialist NES-headquartered subsea supplier to a customer programme now under active offshore build-out at Hartlepool (Saipem-led 149 km subsea CO2 pipeline). Sonardyne's environmental monitoring technology is understood to cover baseline seabed characterisation, environmental sensing and post-injection monitoring. The programme extends into a service-business model — not one-off equipment sale — that anchors long-term subsea monitoring revenue at operational CCS asset scale.

NES Sales Opportunity: The Sonardyne / NEP embedded monitoring service-business model is a direct NES supply-chain reference for other subsea instrumentation, environmental monitoring, AUV, ROV, cathodic protection and marine survey firms. NES Tier 2/3 firms should approach NEP (BP, Equinor, TotalEnergies), Saipem UK, Harbour Energy (Viking) and other CCS operators with service-based monitoring propositions rather than one-off product sales. Directly cross-sells into North Sea decommissioning environmental monitoring and post-P&A verification scope with Boskalis Decommissioning Collective and other operator frameworks.

EnQuest confirms interest in bp UK North Sea portfolio — c.£2.5bn package (7–9 September 2026)

Offshore Magazine confirmed on 9 September that EnQuest CEO Amjad Bseisu has publicly confirmed EnQuest's interest in acquiring bp's UK North Sea oil and gas business, following his 3 September CNBC interview. Reports put the portfolio at c.£2.5 billion, with bp seeking a single cash buyer for the full UK upstream and midstream package. Bseisu separately used the week (7 September, Energy Voice) to call for a "lifeline" for the North Sea as operators "cut the cord" to the UK. The bp UK North Sea portfolio scope includes production assets, decommissioning liabilities, NEP CCS partner stake and long-life midstream infrastructure. Any bp portfolio sale would trigger a full supply-chain re-tendering programme with new operator preferences.

NES Sales Opportunity: An EnQuest acquisition of the bp UK North Sea portfolio would drive one of the largest single supply-chain re-tendering events on the UKCS this decade. NES Tier 2/3 firms should refresh accounts with EnQuest UK (Aberdeen), bp UK procurement (Sunbury / Aberdeen), Baker Hughes UK (Aberdeen), Wood plc (Aberdeen), Petrofac and Aker Solutions immediately. Priority scope: HV electrical, hazardous-area electrical, mechanical fabrication, wells, drilling, subsea intervention, ROV, coatings, cathodic protection, integrated logistics and specialist QHSE. Reposition capability packs for both incumbent bp scope and post-transaction EnQuest operator preference.

Wood plc returns to family ownership under Sidara — Aberdeen HQ retained (9 September 2026)

Energy Voice reported on 9 September that Wood plc has now completed its formal return to family ownership under Sidara. Headcount has remained consistent as the Aberdeen firm plots growth opportunities in oil and gas engineering, decommissioning, offshore wind, CCUS and hydrogen. The Wood plc return to family ownership completes an 18-month restructuring following the failed Apollo Global takeover approach, and re-anchors the Aberdeen headquartered engineering, procurement and construction management capability at scale. Wood plc's post-transaction growth plan is expected to lead into Q4 2026 organic engagement across the AR8, HAR2, Track 2 CCS, decommissioning and Autumn Budget scope.

NES Sales Opportunity: The Wood plc restructuring completion re-anchors an Aberdeen-headquartered EPCm major and is a strong signal for the wider NES supply-chain ecosystem. NES Tier 2/3 firms should refresh accounts with Wood plc procurement (Aberdeen), position around Wood's decommissioning, offshore wind, CCUS and hydrogen growth priorities, and secure early framework alignment ahead of Wood-led programme awards. Priority scope: high-integrity welding, hazardous-area electrical, coatings, cathodic protection, mechanical fabrication, HV electrical, ROV inspection, integrated project management and specialist QHSE.

8. Hydropower & Pumped Storage

Ofgem LDES Window 1 cap-and-floor autumn awards remain scheduled — five pumped storage anchor projects

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 Rígifa 200 MW 18-hour), TeesCAES 50 MW compressed air, and Frontier Legacy 65 MW vanadium/zinc flow. The Next Steps for Energy Storage forum is scheduled for 17 September 2026 (Westminster). 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.

SSE plc RIIO-T3 investor engagement re-affirmed — supply-chain workbook continues (9 September 2026)

The follow-through from the 2 September SSE plc Aberdeen investor day continues to shape the NES supply-chain workbook. On 9 September SSE plc separately announced a record €7.25 million community investment across Ireland for 2025/26, bringing the total since 2001 to €26.47 million. The SSE Renewables and SSEN Transmission workbook combining Coire Glas 1,440 MW pumped storage, Beaully-Denny reinforcement, Dogger Bank offshore wind, Seagreen and Berwick Bank alongside £29 billion RIIO-T3 sits as the largest UK long-duration transmission and generation supply-chain workbook of the decade. The Netherton Hub and Eastern Green Link 2 (Peterhead-Drax subsea HVDC) site visits keep supply-chain positioning windows open across HVDC, HV electrical, cable, substation civils, coatings and specialist QHSE.

NES Sales Opportunity: The combined SSE Renewables + SSEN Transmission workbook is a decade-long anchor for NES supply-chain positioning. Refresh SSE Renewables (Perth), SSEN Transmission (Perth) and Coire Glas project team engagement across HV electrical, tunnelling, hydraulic engineering, HVDC works, substation civils and specialist QHSE. Cross-sell to Beaully-Denny reinforcement and Peterhead-Drax Eastern Green Link 2 sub-contract windows.

9. Policy

Jackdaw gas field decision delayed until after 8 October by-election — late autumn ministerial call (11 September 2026)

Reuters reported on 11 September, citing a Telegraph story quoting Government sources, that Prime Minister Andy Burnham is set to delay the ministerial decision on Jackdaw until after the 8 October Holborn and St Pancras parliamentary by-election, with the decision now pushed back to late autumn. The by-election was triggered by the resignation of Keir Starmer as a lawmaker and is expected to be closely contested by Labour and the Green Party. The decision had previously been expected on 15 September; a Department for Energy Security and Net Zero spokesperson said the department would not comment on speculation but confirmed that any decision would take into account environmental assessments and public representations. The government has never publicly confirmed a decision date.

NES Sales Opportunity: The Jackdaw delay pushes the 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 appears to face separate delay. Priority scope: HV electrical, hazardous-area electrical, subsea intervention, ROV, marine warranty, mechanical fabrication, wells, drilling, coatings, cathodic protection and specialist QHSE.

NSTA recruits new Chief Operating Officer and Digital & Data Director (7 September 2026)

Energy Voice reported on 7 September that the North Sea Transition Authority has opened recruitment for a new Chief Operating Officer role at a stated salary of £172,644, alongside a new Digital & Data Director role. The recruitment programme reflects NSTA's continuing regulatory expansion into offshore hydrogen, CCS licensing (Track 1 and Track 2), decommissioning oversight and the Abandonment Fee Rules commencing 30 September 2026. The NSTA COO role directly leads NSTA operational delivery across licensing, compliance, decommissioning oversight and the wider Clean Power 2030 regulatory scope.

NES Sales Opportunity: NSTA operational leadership refresh signals continuing regulatory expansion into hydrogen, CCS and decommissioning. NES Tier 2/3 firms should refresh regulatory engagement with NSTA (Aberdeen / London) on decommissioning oversight, Abandonment Fee Rules readiness (30 September commencement), Track 1 and Track 2 CCS licensing scope, and offshore hydrogen licensing framework. Priority engagement: NSTA supply-chain team, NSTA decommissioning team and NSTA emerging energies team.

Orsted secures favourable EU advisory-commission ruling on UK offshore wind farm taxation (11 September 2026)

Reuters reported on 11 September that Denmark's Orsted said an EU advisory commission has ruled its two British wind farms should be taxed primarily in Britain — supporting the company's position in a long-running dispute between Danish and UK tax authorities. The case dates back to 2015 when Orsted first approached both tax authorities to avoid double taxation. After the authorities failed to reach agreement, they referred the matter in 2023 to the EU Arbitration Convention advisory commission. The Danish authorities had claimed 6.6 billion Danish crowns (\$1.03 billion) in taxes and interest relating to the development of the offshore wind farms. The ruling reinforces the UK offshore wind investment climate at a time of policy scrutiny across the Rosebank, Jackdaw and AR8 windows.

NES Sales Opportunity: The Orsted UK tax ruling is a positive investment-climate signal for the UK offshore wind sector. NES Tier 2/3 firms should refresh accounts with Orsted UK (Salamander project partner), and

use the ruling as positioning for continued confidence in the UK offshore wind pipeline. Directly cross-sells into Salamander, Hornsea 3 and Hornsea 4 supply-chain windows.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
16 Sep 2026	NESO AR8 CfD qualification assessment closes (all pots)	National	Contractor entry window
17 Sep 2026	Next Steps for Energy Storage forum (Westminster)	London	LDES Window 1 preview
21 Sep 2026	Ithaca Energy FTSE 100 promotion effective	London / UK	Institutional capital re-rate
22–23 Sep 2026	Carbon Capture Global Summit 2026	QEll 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
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

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
OWGP 2026 Innovation Funding (post-award)	£1m across 7 UK firms	Awarded 8 Sep 2026	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 Ideol 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
NSTA COO / Digital Director recruitment	£172,644 COO salary	Open recruitment	Regulatory expansion signal
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
Nexos Group unified brand launch	Consulting / engineering / delivery	Live 8 Sep 2026	Integrated bid partner scope
Port of Aberdeen £25m MCR facility	£25m South Harbour scope	Development phase	Floating wind O&M anchor

12. Business Development Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
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. Concrete engineering, structural steel, HV electrical, coatings.	★★★★★	Approach Q3 2026

Opportunity	Details	Rating	Action Window
Port of Aberdeen £25m South Harbour MCR facility	£25m major-component-replacement facility for floating wind O&M (7 Sep). 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, Swinney announcement (10 Sep). 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 awarded 8 Sep.	★★★★★	Approach Q3 2026
Ossian ScotWind 3.6 GW cable and array procurement	SSE / Marubeni / CIP JV, 260-mile cable survey complete (9 Sep). 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, connected to 100 MW onshore battery. Design and O&M supply chain now moving.	★★★★	AR8 window
Buchan Offshore Wind 1 GW project (BW Ideal / BayWa r.e. / Elicio)	Onshore consent secured, Ardersier serial foundation manufacturing FEED underway. First deployment of Damping Pool® at scale.	★★★★★	Approach Q3 2026
Baker Hughes bp UK North Sea vessel-based stimulation contract	StimFORCE vessel-based stimulation across new and mature bp UKCS assets. Sustained bp CAPEX 2027–29. Wells, HV electrical, marine warranty, ROV.	★★★★★	Approach Q3 2026
EnQuest interest in bp UK North Sea portfolio (c.£2.5bn)	CEO Bseisu confirmed interest (3 Sep, restated 7–9 Sep). Any transaction triggers portfolio-wide supply-chain re-tendering. All UKCS engineering, HV, subsea, wells.	★★★★★	Q4 2026 window
SSE plc £29bn RIIO-T3 SSEN Transmission (Aberdeen)	Eastern Green Link 2, Netherton Hub, Coire Glas 1,440 MW pumped storage, Beaully-Denny reinforcement. £150m Thainstone training centre. Aberdeen South College Street cable replacement from 7 Sep.	★★★★★	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. Track 1 East Coast, Track 2 Viking, Acorn Peterhead.	★★★★	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

Opportunity	Details	Rating	Action Window
Jackdaw ministerial decision delayed to late autumn (Reuters 11 Sep)	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
Wood plc family ownership restructuring completion (Sidara)	Aberdeen HQ retained. Growth in oil and gas engineering, decommissioning, offshore wind, CCUS, hydrogen. Refresh Wood plc procurement engagement.	★★★★	Q3 2026
Aberdeen City Council withdrawal from BP hydrogen hub JV	Kittybrewster hydrogen scope reorganisation opens window for alternative developers and hydrogen supply-chain entrants. Q4 2026 selection process.	★★★	Q4 2026
Humber Hydrogen £500m collective proposal (7 Sep)	4,000 jobs preserved if funded. Cross-cluster hydrogen network. NES firms with cross-cluster hydrogen and CCS credentials.	★★★	Q4 2026
ORE Catapult £4m Large Scale Synthetic Mooring Line Test Rig	JTF award (1 Sep, awarded to ORE Catapult 2026–28). Floating wind mooring supply-chain test scope. Concrete, fibre rope, cathodic, marine.	★★★★	Q3 2026–28
DNV report: turbine standardisation 25–28% LCoE reduction	Direct port and installation capacity positioning window for NES ports and Tier 2/3 fabrication, HV, cable, monopile transition-piece firms.	★★★★	Q4 2026
University of York FutureSource 4 km geothermal well	Drillmec Rig 65 arrived Immingham 1 Sep. 4 km deep-geothermal district heating first-of-a-kind. Deep-drilling, casing, cementing scope.	★★★	Q4 2026
Ithaca Energy FTSE 100 promotion (effective 21 Sep)	Second-largest UKCS independent producer. Institutional capital re-rate ahead of Jackdaw / Rosebank decisions. Refresh Ithaca Energy accounts.	★★★★	Effective 21 Sep
Orsted UK offshore wind farm tax ruling (11 Sep)	Positive UK offshore wind investment-climate signal. Cross-sell into Orsted UK Salamander, Hornsea 3, Hornsea 4.	★★	Q4 2026
Nexos Group unified consulting / engineering / delivery brand (8 Sep)	Integrated brand launch. NES Tier 2/3 firms should engage Nexos as integrated bid partner for offshore wind, CCUS, decommissioning scope.	★★★	Q3 2026

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