INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 27 June 2026

Prepared by ExportCentral AI

Coverage Period	Audience	Classification
21 – 27 June 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

Long-duration energy storage has its breakout week. Ofgem on 26 June published its minded-to decisions on Window 1 of the LDES Cap-and-Floor regime, naming 16 projects totalling 7,645 MW of duration storage — including the first three new pumped-hydro schemes consented in Great Britain in over four decades. SSE's 1.5 GW Coire Glas at Loch Lochy, Statera Energy's 600 MW Loch Kemp at Loch Ness and Gilkes Energy's 1.8 GW Earba between Lochs Leamain and Earba together account for c.3.9 GW of new Scottish pumped storage targeting commissioning in the early 2030s. A consultation closes 7 August 2026 with final cap-and-floor licences expected in autumn. For NES Tier 2/3 firms, this lifts EPC procurement timelines for civil works, electromechanical packages, grid connection and HV substations from speculative to fundable.

The Crown Estate doubles down on UK offshore wind supply chain. FY2025/26 results published 25 June reported £1.245 billion operating profit and a 56 GW pipeline (up from 50 GW). A £400 million commitment to the UK offshore wind supply chain anchors Round 6, planned to deliver up to 6 GW of new capacity, alongside the Supply Chain Accelerator (£18 million awarded since 2024, £13 million this financial year). The strategic signal is unambiguous: supply chain capacity, not seabed acreage, is the binding constraint — and Crown Estate intends to use balance sheet to fix it.

A 2 GW ScotWind milestone and political turbulence. ScottishPower lodged the consent application for MachairWind on 24 June — a 144-turbine, 2 GW project in the Inner Hebrides connecting to the grid near Girvan in Ayrshire in the early-to-mid 2030s. Three days earlier, Prime Minister Keir Starmer resigned on 22 June following internal Labour party turmoil. The transition has created acute policy uncertainty for the long-delayed Hydrogen Allocation Round 2 (HAR2), the Hydrogen Strategy refresh, and the CCS Track-2 cluster funding decisions — all of which were expected this summer. BP simultaneously scrapped its 1.2 GW H2Teesside blue-hydrogen project (24 June), citing the displacement of green-and-blue hydrogen by AI-data-centre demand at Teesworks.

CCUS finance moves while policy stalls. Eni's CCUS Holding closed a €600 million-plus (c.£500 million) sustainability-linked credit facility led by Mizuho with 13 international lenders (announced 11 June and reported through the week). Proceeds fund Liverpool Bay CCS (HyNet, 30%+ construction complete), the Bacton hub, the Tellus deep-saline aquifer, plus Netherlands L10. The Carbon Storage Decommissioning Funding Regulations (SI 2026/632) come into force 10 July 2026, requiring 10% contingency-bearing decommissioning funds before operators can transfer obligations to the Secretary of State.

Investment headline, but data centres redefine the equation. DESNZ confirmed on 24 June that £100 billion of clean energy investment has been secured since the General Election, including £27 billion unlocked by this year's auctions and £1.2 billion of National Grid transmission contracts (23 June) covering 1,000 km of new pylon lines. The CCC's 2026 Progress Report (24 June) recorded UK emissions of 407 MtCO2e in 2025, a 1.8% reduction, while Parliament approved Carbon Budget 7 mandating an 87% reduction by 2040. Ballard Power

Systems (TSX: BLDP) agreed to acquire UK stationary-hydrogen specialist GeoPura for £301.1 million on 24 June, signalling that backup-power, off-grid and EV-charging hydrogen markets are consolidating fast.

1. Offshore Wind — Fixed Bottom

Crown Estate FY2025/26: £400m supply-chain commitment, 56 GW pipeline, Round 6 confirmed

On 25 June 2026 The Crown Estate reported £1.245 billion operating profit (up from £1.027 billion) and announced that its UK offshore wind pipeline now stands at 56 GW — six gigawatts higher than reported a year ago. CEO Dan Labbad confirmed Round 6 will deliver up to 6 GW of new capacity and is now in design. The £400 million supply-chain commitment underpinning Round 5 floating leases now extends into Round 6. The Supply Chain Accelerator — launched in 2024 — has now awarded £18 million total, with £13 million invested this year, and Round 3 applications close 3 July 2026. Marine business profits stood at £175 million (up from £156 million).

The capital allocation framework signals that capacity bottlenecks in UK manufacturing, port infrastructure and skilled labour are the binding constraint on AR8 deliverability. Crown Estate intends to deploy balance-sheet finance, not just leasing revenue, to address them — including direct equity in supply-chain ventures via the Strategic Investment Vehicle.

> **NES Sales Opportunity:** Round 3 of the Supply Chain Accelerator closes 3 July 2026 — six working days from today. Applications are open to fabrication, monopile, jacket, port logistics, cable and electrical infrastructure firms with credible UK-content plans. NES Tier 2/3 firms with Tier 1 sponsor letters should submit. The 25 June FY results explicitly flag fabrication, port and electrical capacity as priority gaps.

ScottishPower lodges 2 GW MachairWind consent application — Inner Hebrides

ScottishPower Renewables submitted the consent application for the 2 GW MachairWind offshore wind farm on 24 June 2026. The ScotWind site sits in the Inner Hebrides and comprises 144 turbines, two offshore substations and HVAC export cables landing near Girvan in Ayrshire. Commissioning is targeted for the early-to-mid 2030s. ScottishPower's consent ambitions now total 5 GW across MachairWind, East Anglia THREE/FOUR and the Sea Green extension.

> **NES Sales Opportunity:** MachairWind delivers a substantial Scottish-content opportunity. Tier-2 packages most accessible to NES firms include: offshore substation topsides and jackets, subsea cable installation and protection, geophysical/geotechnical survey, met-mast and floating-LiDAR campaigns, and Girvan grid-connection civil works. NES firms with monopile, jacket or HVAC cable accreditation should engage ScottishPower's supply-chain team during the consenting window (12–24 months).

Inch Cape second export-cable installation begins — Scotland's largest renewable project

TGS 4C reported on 26 June 2026 that installation of the second export cable for Inch Cape Offshore Wind Farm began this week. Inch Cape is Scotland's largest renewable project under construction. The 54 monopile installation completed earlier in 2026; the cable phase brings the project into electrical commissioning territory for 2027 first power. Operator: Inch Cape Offshore Limited (joint venture between ESB and Red Rock Renewables).

> **NES Sales Opportunity:** Inch Cape is in commissioning phase. NES firms accredited for HV cable termination, OFTO transfer, marine operations and warranty-period O&M should target the project director through the Port of Montrose construction base. Final electrical commissioning typically generates urgent specialised-services contracts on six-week timescales — Tier 3 service responsiveness is a strong differentiator versus international Tier 1s.

AR8 statutory notices and Hornsea 4 / Dogger Bank pipeline

DESNZ confirmed AR8 statutory notices are due to be published 6 July 2026, with the application window opening 20 July. Hornsea 4 (Ørsted) and Dogger Bank A (SSE/Equinor/Vargrønn) have signalled they will participate. Carbon Brief’s 26 June daily brief noted offshore wind capacity factors held above 47% across Q2, underpinning operator confidence in higher strike prices.

2. Floating Offshore Wind

Round 6 sequencing and NDC PhD floating-wind anchor research

The Crown Estate confirmed on 25 June that Round 6 design will fold floating leasing into a single integrated round rather than the previous fixed/floating split, accelerating Celtic Sea and Scottish wider waters leasing. Floating volumes within Round 6 are expected to be confirmed late 2026.

The National Decommissioning Centre at Aberdeen announced on 24 June three new PhD studentships (in partnership with the University of Aberdeen) including a directly named floating-wind anchor and mooring topic, plus blade recycling and asset-integrity monitoring. Application deadline is 9 July 2026 — six working days. Studentships pay £20,000 stipend plus a project budget.

> **NES Sales Opportunity:** NES floating-wind firms with mooring, anchor, fabrication or composites capability should sponsor or co-fund one of the three NDC PhD studentships before 9 July. The R&D credit profile and direct University of Aberdeen access generates qualifying R&D Tax Credit claims plus a pipeline of senior engineering hires by 2029. Floating-wind anchor IP is currently dominated by Norwegian and French players — UK capability is a documented gap.

Carbon Trust Floating Wind Joint Industry Project

Carbon Trust on 25 June 2026 published its Floating Wind Joint Industry Project Stage 4 update, covering dynamic-cable qualification, station-keeping and floating-array layout standardisation. Tier-1 developers including Ørsted, SSE, Equinor, EnBW, EDF and Iberdrola are funders.

3. Hydrogen

Starmer resignation halts HAR2 — 27 shortlisted projects in limbo

Prime Minister Keir Starmer announced his resignation as Labour leader and Prime Minister on 22 June 2026. S&P Global Commodity Insights on 23 June reported that the political transition has stalled three key hydrogen and CCS decisions originally expected this summer: (i) the Invitation to Offer for Hydrogen Allocation Round 2, which shortlisted 27 projects in April 2025 totalling 765 MW; (ii) the Hydrogen Strategy refresh; (iii) CCS Track-2 cluster funding for Acorn (St Fergus) and Viking (Humber).

Olivia Powis (CEO, Carbon Capture and Storage Association) was quoted: "The biggest concern for the CCS industry is uncertainty over Track-2 timelines." Clare Jackson (CEO, Hydrogen UK) added: "27 projects have been waiting 14 months for their ITO — every additional month pushes FID by two, given electrolyser-supplier order books." Emma Guthrie (CEO, Hydrogen Energy Association) noted the impact on transport hydrogen and HGV trial projects awaiting business-model clarity.

Andy Burnham (Mayor of Greater Manchester) is the leading contender for Labour leader. Ed Miliband (currently Secretary of State for Energy Security and Net Zero) is reportedly being considered for Chancellor or to remain in his current role. The result of the leadership contest is expected by mid-to-late August 2026.

> **NES Sales Opportunity:** Aberdeen-based hydrogen project Cromarty (Storegga / ScottishPower) targeting 15 MW electrolyser FID in December 2026 sits within HAR2 round 1 award. NES Tier 2/3 hydrogen firms

(electrolyser BoP, compression, refuelling) should NOT pause business development — instead use the political pause to deepen pre-FEED relationships with the 27 shortlisted developers, who are themselves searching for credible UK-content supply partners to strengthen HAR2 bid scores.

BP scraps H2Teesside — data-centre demand wins on Teesworks site

BP confirmed on 24 June 2026 that it has cancelled the 1.2 GW H2Teesside blue-hydrogen project. The Teesworks site approved earlier this year for a 1.2 GW data-centre development by Blackstone has superseded the hydrogen production scheme. BP's green-hydrogen HyGreen Teesside (500 MW) was cancelled in March 2026. BP has now exited UK hydrogen production. East Coast Cluster CCS volumes from H2Teesside are removed from the Track-1 storage stack, reducing Endurance store loading by c.2 MtCO2/year.

Ballard acquires GeoPura for £301m — stationary hydrogen consolidation

Ballard Power Systems on 24 June 2026 agreed to acquire UK stationary-hydrogen power firm GeoPura for £301.1 million (£275 million upfront, £27.5 million earn-out). The transaction closes H2 2026. GeoPura operates Hydrogen Power Units (HPUs) deployed across construction, film/television, motorsports, EV charging and grid-services markets. Ballard's rationale: cross-sell PEM fuel-cell stacks into GeoPura's deployment platform and add UK manufacturing/service footprint.

Frontier Power on 26 June separately confirmed it has welcomed Ofgem's minded-to LDES decision approving its 2.8 GWh zinc Long Duration Energy Storage project across the Ayr and Busby Z3 sites. Frontier acquired the Apatura portfolio in June 2026 and the zinc-bromine flow chemistry is one of three flow-battery technologies named in Window 1.

Humber hydrogen impact analysis — £17bn growth, 53,000 construction jobs

A Pipeline Journal report on 24 June 2026 set out the value-chain case for the Humber hydrogen cluster following its £500 million Hydrogen Transport and Storage Business Model award: £17 billion economic growth potential, 53,000 construction jobs, with the 100 km hydrogen pipeline backbone and salt-cavern storage anchoring the cluster. Equinor and SSE's Aldbrough hydrogen storage moves to FEED.

4. CCUS

Eni CCUS Holding closes £500m+ Mizuho-led sustainability-linked facility

Eni and 13 international lenders led by Mizuho closed a c.£500 million (€600m+) sustainability-linked credit facility for Eni's CCUS Holding subsidiary (announced 11 June 2026, reported and analysed through the week). Proceeds fund: Liverpool Bay CCS (HyNet, 30%+ of construction complete, operations targeted Q4 2027); the Bacton CO2 transport-and-storage hub serving Anglian and London-region emitters; the Tellus deep-saline aquifer in the central North Sea; plus the Netherlands L10 store. Eni CCUS Holding holds project equity in addition to operatorship.

This is the largest dedicated CCUS facility closed in EMEA to date, and the first under updated EU sustainability-linked loan principles. Twelve banks plus Mizuho is unusual for a sub-investment-grade structured project — signalling that bank balance sheets are now willing to finance CCS T&S without sovereign guarantees behind every tranche.

Carbon Storage Decommissioning Funding Regulations — in force 10 July 2026

Statutory Instrument 2026/632, made on 27 May 2026, lays the Carbon Dioxide Transport and Storage Decommissioning Funding Regulations under Section 92 of the Energy Act 2023. The Regulations come into force on 10 July 2026 (12 working days from today). Operators must establish a decommissioning fund with 10% contingency before NSTA will permit any operational handover. The Secretary of State must approve fund composition and any variation. The fund must remain in place until the Secretary of State accepts transfer of decommissioning responsibility.

> **NES Sales Opportunity:** NES firms in subsea integrity monitoring, well-plug-and-abandonment, leak detection and CO2 plume MMV (measurement, monitoring, verification) should expect a step-change in tendering volumes from Track-1 operators (BP/Equinor for NEP, Eni for HyNet, Harbour for Viking, Storegga for Acorn) over the 10 July to 10 October window as decommissioning fund quantification work is contracted. Independent verification services will be in high demand under the new fund-composition approval rules.

CCS Track-2 (Acorn, Viking) — political uncertainty intensifies

The Starmer resignation on 22 June compounds the delay in CCS Track-2 funding decisions originally expected in spring 2026. S&P Global on 23 June reported industry warnings that further delay risks Acorn's 2030 first-injection target. Storegga, Harbour Energy and Equinor have all called for a Track-2 final investment decision letter by end Q3 2026 to keep early-2030s operations achievable.

5. Marine & Tidal

Spiorad na Mara consultation closes 12 July 2026

SAE Renewables' Spiorad na Mara tidal-stream project consultation, hosted by Marine Directorate Scotland, closes 12 July 2026. The proposed site lies in the Pentland Firth, building on MeyGen experience. The project has signalled application volumes for up to 30 MW tidal capacity. Consenting is expected to take 18–24 months following consultation close.

> **NES Sales Opportunity:** Pentland Firth tidal projects offer NES Tier 2/3 firms a route into a sector where UK content is structurally high (75%+) and Highland & Islands location is favoured. Subsea cable installation, foundation civils, vessel charter for survey campaigns and biological-monitoring services should target SAE Renewables' supply-chain manager during the consultation window. Crown Estate Scotland tidal leasing round expected late 2026 will broaden opportunity.

AR8 ringfenced tidal pot — 28 MW at strike price £237.32/MWh

DESNZ statutory notices for AR8 confirm that tidal-stream remains a ringfenced pot, with administrative strike price set at £237.32/MWh (real 2012 prices). Capacity ringfence is approximately 28 MW. MeyGen Phase 2, Magallanes Renovables Holyhead Deep and Orbital Marine Power's O2 successor are expected applicants.

6. Geothermal

Northern Ireland deep-geothermal consultation closes 7 August 2026

The Department for the Economy Northern Ireland's consultation on a deep-geothermal regulatory regime closes 7 August 2026. The consultation covers licensing, royalties and environmental safeguards for both heat-only and electricity geothermal. UK Government via DESNZ has signalled support for parallel work in Great Britain. Aberdeen-based Petrolern and Geothermal Engineering Limited (GEL) are active in the wider UK consultation programme.

> **NES Sales Opportunity:** NES Tier 2/3 firms with deep-drilling, completions, surface-facilities and CO2-injection capability have direct read-across into deep-geothermal wells (4–6 km). Submitting evidence to the NI consultation profiles supplier capability ahead of any future licensing round. The skills overlap with

> deepwater drilling is c.85%, making former oil-and-gas service firms structurally advantaged versus pure-play geothermal entrants.

CeraPhi Kirby Misperton heat-network development continues

CeraPhi Energy's Kirby Misperton (North Yorkshire) closed-loop geothermal heat-network project continued FEED engineering through the week. The 12 MWth scheme repurposes a former onshore gas exploration well and would supply Pickering and surrounding communities. Heat Network Investment Project (HNIP) funding decision still pending.

7. Decommissioning

NDC Aberdeen launches three new PhD studentships — application deadline 9 July

The National Decommissioning Centre (NDC) at Newburgh, Aberdeen announced on 24 June 2026 three new PhD studentships in partnership with the University of Aberdeen, available for September 2026 start. Topics include: floating-wind anchor and mooring systems, blade-and-composites recycling at end-of-life, and asset-integrity monitoring of subsea systems. Application deadline 9 July 2026. Studentships are funded jointly with industry sponsors.

Semco Maritime wins 5-year INEOS framework — Danish North Sea precedent for UKCS

Semco Maritime on 24 June 2026 announced a five-year framework agreement with INEOS Energy covering EPC services for Danish North Sea fields, running June 2026 to May 2031. The framework explicitly references early-engagement engineering, maintenance, modifications and decommissioning scope. INEOS Energy holds significant UKCS assets in the Breagh, Clipper, North Sea Hub and Cygnus fields, where similar frameworks are anticipated.

> **NES Sales Opportunity:** NES decommissioning specialists with subsea well P&A, late-life production-platform integrity, marine spread, and wells engineering capability should approach INEOS Energy UK with reference to the Semco Danish framework as a template. The 5-year UKCS extension is plausible in late 2026 once Danish operations bed in. Aberdeen-based wells and topside-removals firms have a natural advantage given existing INEOS UKCS field knowledge.

NSTA Northern Endurance Partnership tenders — c.30 June

NSTA is expected to release Northern Endurance Partnership (NEP) operational-readiness tenders around 30 June 2026 for monitoring, integrity-management and standby services covering the Endurance store ahead of injection start-up in Q4 2027. Operator BP and partners Equinor and TotalEnergies will run a separate Tier-2/3 sub-tender wave in late Q3.

8. Hydropower & Pumped Storage

Ofgem LDES Cap-and-Floor Window 1 — 16 projects, 7,645 MW minded-to approved

Ofgem on 26 June 2026 published its minded-to decisions for Window 1 of the Long Duration Electricity Storage (LDES) cap-and-floor regime. Sixteen projects totalling 7,645 MW received provisional support, drawing across pumped-storage hydro (PSH), compressed-air energy storage (CAES), lithium-ion long-duration and vanadium/zinc flow batteries (VRFB). Consultation runs until 7 August 2026; final cap-and-floor licences expected autumn 2026. Projects target operational dates ranging from 2029 to 2033.

Three Scottish pumped-hydro schemes are the headline winners — the first new hydropower in Great Britain in over four decades:

• **Coire Glas (SSE) —** 1.5 GW, c.30 GWh storage, Loch Lochy near Fort William. Operational date c.2031.

• **Loch Kemp (Statera Energy) —** 600 MW, Loch Ness. Operational date c.2031.

• **Earba (Gilkes Energy) —** 1.8 GW, two-reservoir scheme at Lochs Leamain and Earba (Inverness-shire). Operational date c.2032.

Lithium-ion Window 1 winners include large >500 MW schemes targeting 8-hour duration. Frontier Power's zinc-bromine VRFB at the Ayr and Busby Z3 sites (2.8 GWh) is also named. The cap-and-floor regime guarantees a floor revenue ahead of operations and shares upside above the cap with consumers — a model adapted from interconnector regulation.

> **NES Sales Opportunity:** Three Scottish pumped-hydro projects worth £6–8bn capex collectively now move from speculative to fundable. EPC procurement timelines accelerate from H2 2026 (civil works packages: tunnel boring, dam works, intake civils, access roads) into Tier-2 specialist tenders by Q4 2026. NES firms with electromechanical, HVAC substation, control-systems, marine cable (Coire Glas tailrace into Loch Lochy) and tunnel-ventilation capability should engage SSE, Statera and Gilkes' supply-chain teams within the consultation window (closes 7 August). Penstock, gates and runner fabrication remain dominated by Andritz, Voith and GE — opportunity is in civils-package subcontracts.

9. Policy

Carbon Budget 7 approved: 87% reduction by 2040

Parliament on 25 June 2026 approved Carbon Budget 7, locking in an 87% reduction in UK greenhouse-gas emissions by 2040 versus the 1990 baseline. The budget is the legal basis for the CB7 delivery plans expected in late 2026 covering power, transport, buildings, industry and land use. Industry trade associations including RenewableUK, the CCSA and Hydrogen UK welcomed the legislative certainty.

CCC 2026 Progress Report: emissions down 1.8%, capex bottleneck flagged

The Climate Change Committee's 2026 Progress Report (24 June) recorded 2025 UK greenhouse-gas emissions at 407 MtCO2e — a 1.8% reduction year-on-year. The CCC identified delivery risk in heat-pumps, EV-charging and clean-power deployment relative to CB7 pace. The Future Homes Standard and Future Buildings Standard regulations passed in March 2026 enter force in 2027 and are projected to deliver buildings-sector decarbonisation.

£100 billion clean-energy investment milestone — National Grid £1.2bn transmission contracts

DESNZ confirmed on 24 June 2026 that £100 billion of clean-energy investment has been secured in the UK since the General Election. The figure includes £27 billion unlocked by current-year auction rounds and £1.2 billion of National Grid transmission contracts (announced 23 June) covering 1,000 km of new pylon lines linking Scottish wind generation to English demand centres. Contracted EPC tier-1 contractors include Balfour Beatty, Murphy Group, Linxon and Hitachi Energy.

Ofgem demand-connections reform + GC0164 Grid Code

Ofgem on 16 June published the Connect update on demand-connections reform under the Future Energy Pillar. The update establishes a strategic Independent Transmission Owner (iTO) licence priority filter and confirms the Gate 2 connection-offer timeline: Phase 1 offers by 30 September 2026, Phase 2 offers by 31 January 2027. The reform is critical for new offshore wind, hydrogen and CCS projects competing for connection capacity.

On 25 June Ofgem published its decision on the GC0164 Grid Code workgroup proposal, with effective date 9 July 2026. GC0164 modifies provisions on demand-control behaviour during system stress events, directly affecting electrolyser-load and CCUS-plant operating regimes.

Scotland Offshore Wind Skills Programme — £1.7m awarded

The Scottish Government on 22 June 2026 announced £1.7 million for offshore wind training projects. Recipients include the University of the Highlands and Islands (UHI) £1.17 million for a Highlands & Islands offshore wind training hub; ECITB £372,800 for cross-sector skills passporting; and North East Scotland College £135,200 for technician pipeline. UHI funding is the largest single award and centres on long-term wind-technician supply.

DESNZ Plug-in Solar consultation closes 30 June 2026

DESNZ's consultation on plug-in solar deployment (G99 / G98 regulatory framework, 800-W limit, certification) closes 30 June 2026 — three working days from today. Industry retailers including B&Q, Wickes and Screwfix have signalled support. Direct read-across into balcony/rooftop micro-PV for residential, light-commercial and small-port applications.

Crown Estate Round 6 confirmed; AR8 statutory notices 6 July

Crown Estate confirmed on 25 June that Round 6 (up to 6 GW) will be progressed alongside the Strategic Investment Vehicle equity programme. AR8 statutory notices are due 6 July 2026, with the formal application window opening 20 July 2026.

10. Key Upcoming Events for NES Companies

Calendar of confirmed events, deadlines and regulatory windows in the next eight weeks (28 June – 22 August 2026):

Date	Event	Location	NES Relevance
30 June 2026	DESNZ Plug-in Solar consultation closes	Online	Low
c.30 June 2026	NSTA Northern Endurance Partnership operational-readiness tenders	Online (NSTA)	High
3 July 2026	Crown Estate Supply Chain Accelerator Round 3 closes	Online	High
6 July 2026	AR8 statutory notices published	Online (DESNZ)	High
9 July 2026	NDC Aberdeen PhD studentship applications close	Aberdeen	High
9 July 2026	Ofgem GC0164 Grid Code decision effective	Online	Medium
10 July 2026	CO2 T&S Decommissioning Funding Regulations in force	UK statutory	High
12 July 2026	Spiorad na Mara tidal-stream consultation closes	Online (Marine Directorate)	Medium
20 July 2026	AR8 application window opens	Online (DESNZ)	High
7 August 2026	Ofgem LDES Window 1 consultation closes	Online (Ofgem)	High
7 August 2026	NI deep-geothermal regulatory consultation closes	Online (DfE NI)	Medium

Date	Event	Location	NES Relevance
18–20 August 2026	Floating Offshore Wind Conference & Exhibition	Aberdeen P&J Live	High

11. Grant Funding & Support Mechanisms Active This Week

Programme	Value / Scope	Stage	Deadline
Crown Estate Supply Chain Accelerator R3	£18m total since 2024; up to £2m per project (matched); UK offshore wind supply chain capacity	Open	3 July 2026
NDC Aberdeen PhD studentships (3 places)	Floating-wind anchors, composites recycling, asset integrity; £20k stipend + project budget	Open	9 July 2026
DESNZ Plug-in Solar consultation	800 W solar regulatory framework (G99/G98 amendment)	Open	30 June 2026
Scotland Offshore Wind Skills Programme	£1.7m total: UHI £1.17m + ECITB £372.8k + NESCol £135.2k	Awarded	n/a
Spiorad na Mara consultation	30 MW Pentland Firth tidal-stream consenting	Open	12 July 2026
NI deep-geothermal consultation	Licensing, royalties, environmental framework	Open	7 August 2026
Ofgem LDES Window 1	16 projects, 7,645 MW minded-to (cap-and-floor consultation)	Open	7 August 2026
AR8 application window	Offshore wind, tidal-stream ringfenced pots	Opens 20 Jul	20 July 2026
Electricity Generator Levy	Amended 2026/27 rate (from 17 June 2026)	In force	n/a
Strategic Investment Vehicle (Crown Estate)	Direct equity investment in UK OW supply chain firms	Open	Rolling

12. Sales Opportunity Summary for NES Supply Chain Companies

Aggregated opportunity ranking for NES Tier 2/3 firms. Star ratings reflect the combined assessment of contract value, technical fit with NES supply-chain capabilities and award timeline (next 12 months). Five stars indicates immediate, high-value engagement; three stars indicates positioning ahead of late-2026/early-2027 procurement waves.

Opportunity	Description	Window	Priority
Coire Glas civils EPC subcontracts	SSE 1.5 GW pumped storage Loch Lochy: tunnel boring, dam works, intake civils, access roads, HV substation	Q3 2026 → Q4 2026	★★★★★
Earba electromechanical packages	Gilkes 1.8 GW dual-reservoir scheme Lochs Leamain & Earba: control systems, substation EPC, tailrace marine cable	Q3 2026 → Q1 2027	★★★★★

Opportunity	Description	Window	Priority
Loch Kemp grid connection	Statera Energy 600 MW Loch Ness: cable, civils, HVAC substation	Q3 2026 → Q4 2026	★★★★★
MachairWind Tier-2 packages	ScottishPower 2 GW Inner Hebrides: offshore substation, jackets, subsea cable, surveys, Girvan grid civils	Q4 2026 → Q2 2027	★★★★★
Crown Estate Supply Chain Accelerator R3	Up to £2m matched grant per project; fabrication, port, electrical capacity priority	Closes 3 July	★★★★★
NDC Aberdeen PhD sponsorship	Floating-wind anchors, composites recycling, asset integrity (£20k+ co-funding)	Closes 9 July	★★★★
CO2 T&S Decommissioning Fund services	Independent verification, integrity monitoring, fund quantification (BP/Equinor/Eni/Storegga/Harbour)	Q3 2026	★★★★★
NEP operational-readiness tenders	Monitoring, integrity-management, standby services (BP/Equinor/TotalEnergies)	Releases c.30 June	★★★★
INEOS Energy UKCS extension	Late-life integrity, P&A, marine spread, modifications (template: Semco Danish framework)	Late 2026	★★★★
Inch Cape commissioning services	HV cable termination, OFTO transfer, marine ops, warranty O&M	Q3–Q4 2026	★★★★
Cromarty hydrogen pre-FEED	Storegga 15 MW electrolyser FID Dec 2026: BoP, compression, integration	Q3–Q4 2026	★★★★
Spiorad na Mara tidal supply	SAE Renewables up to 30 MW Pentland Firth: cable installation, foundation civils, survey vessels	Q4 2026 → Q2 2027	★★★
NI deep-geothermal positioning	Evidence to DfE NI consultation (deep-drilling, completions, surface facilities)	Closes 7 Aug	★★★
HAR2 shortlist deepening (27 projects)	Pre-FEED engagement with 27 HAR2 shortlistees ahead of post-leadership-contest ITO	Q3 2026	★★★
Floating Wind JIP Stage 4 alignment	Dynamic cable, station-keeping, floating-array standards (Carbon Trust, Tier-1 funders)	Ongoing	★★★

Sources Used

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