INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 13 June 2026

Prepared by ExportCentral AI — North East Energy Supply Sector Space

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A regular intelligence briefing for North East Scotland energy supply chain companies presenting the latest news, trends, developments and sales opportunities in the UK offshore low-carbon sector — including offshore wind, hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning and other offshore renewables.

Executive Summary

A week dominated by **two major UK transmission and offshore wind decisions, hydrogen manufacturing scale-up, and the run-up to Global Offshore Wind 2026 in Manchester**. On **8 June**, **The Crown Estate confirmed it will re-tender the 1.5 GW Morgan offshore wind site in the Irish Sea in July 2026** with award targeted for late 2026 — the first major lease back to market since AR7. On **10 June**, DESNZ published its final AR8 response document confirming **a 24-month longstop period for new floating offshore wind projects, an 85% installed-capacity threshold, and a new ODOW (Other Deepwater Offshore Wind) category for hybrid offshore wind solutions** — cementing the policy backbone for ScotWind floating tier-1 procurement.

In supply chain delivery, **RWE completed installation of all one hundred of its 14 MW Siemens Gamesa turbines at the 1.4 GW Sofia Offshore Wind Farm on 10 June** — a milestone enabled by Cadeler's Wind Peak vessel and Siemens Gamesa's Recyclable Blade assembly at Green Port Hull. In hydrogen, ITM Power confirmed **a £40m GB Energy equity investment and £46.5m DESNZ grant for its 1 GW Chronos electrolyser manufacturing line in Sheffield**, targeting commercial operation in 2028. In policy, **National Grid submitted 25 RIIO-T3 re-opener proposals worth ~£4.5bn** and Ofgem closed the RIIO-2 NARM methodology review on **8 June**. The 900 MW Spiorad na Mara onshore planning application became public on the same day, and the British Hydropower Association issued **a major tidal range manifesto calling for RAB-model financing of >20 GW of UK tidal range resource**. Global Offshore Wind 2026 (Manchester, 16–17 June) and the Northern Ireland geothermal consultation (closes 7 August) bracket the next-7-day procurement calendar.

1. Offshore Wind — Fixed Bottom

Crown Estate to Re-Tender 1.5 GW Morgan Offshore Wind Site in July (8 June 2026)

On **8 June 2026**, **The Crown Estate confirmed it will launch a competitive tender in July 2026 for the 1.5 GW Morgan offshore wind site in the Irish Sea**, ~22 miles off the west coast near the Isle of Man, with a developer award targeted for **late 2026**. The site was originally awarded to a **joint venture of EnBW and BP in 2021** and received a **Development Consent Order in August 2025**, but development was discontinued in January 2026 after the partners concluded the project was no longer economically viable in the absence of a CfD, alongside supply-chain cost increases, higher interest rates and project-execution risk. A decision on the DCO application for the transmission assets — submitted jointly with the 480 MW Morecambe project — is now expected in **September 2026**. The re-tender is separate from Crown Estate Leasing Round 6 expected in H1 2027.

> **NES Sales Opportunity:** A 1.5 GW DCO-cleared lease re-entering the market is **the single biggest new piece of NES offshore wind procurement work for the next 12 months**. Aberdeen Tier 2/3 firms in **marine survey, geotech, EBoP and BoP, fabrication, port logistics, cable installation, ICP and consenting support** should prepare Morgan-specific capability statements now. The winning developer will move into pre-FID procurement through early 2027 and tier-1 sub-contract framework qualification will be the first opportunity — expect EPCI, fabrication and installation tier-1 bidders to publish supply-chain RFIs from Q4 2026.

AR8 Final Response Confirms 24-Month FLOW Longstop and New ODOW Category (10 June 2026)

On **10 June 2026**, the UK Government published its additional responses to its proposed amendments to the AR8 CfD standard terms. Key confirmations: the longstop period for new **floating offshore wind (FLOW) projects is extended to 24 months and the required installed-capacity threshold reduced to 85%**, aligning floating wind delivery flexibility with onshore wind precedent. A new category for **Other Deepwater Offshore Wind (ODOW)** will be introduced from AR8 to cover hybrid offshore wind solutions that do not technically float but are distinct from fixed-bottom. From AR8 onwards, hybrid metering for single-technology, multiple commercial arrangements will be enabled, with phased offshore wind and tidal projects exempt from the multi-CfD restriction. Projects holding a **Gate 1 connection offer will be excluded from AR8** (with the exception of Gate 1 CPCR) and surrendered CfD capacity will be permanently restricted from bidding into AR8 and future rounds.

> **NES Sales Opportunity:** The 24-month FLOW longstop and 85% threshold are a **material de-risking of ScotWind floating-wind procurement timetables** — Aberdeen-based **floating foundation fabrication, dynamic cable, mooring engineering and marshalling-port firms** should be aware that tier-1 procurement for FLOW projects can now stretch deeper into 2030s, opening longer engagement runways. The ODOW category creates a possible new lane for UK supply-chain firms developing hybrid TLP / semi-submersible / fixed-foundation hybrid concepts — worth scoping with named tier-1 ScotWind developers in Q3 2026.

RWE Completes Installation of All 100 Turbines at 1.4 GW Sofia Offshore Wind Farm (10 June 2026)

On **10 June 2026**, RWE confirmed **successful installation of all 100 of its 14 MW Siemens Gamesa SG-14 222 DD turbines at the Sofia Offshore Wind Farm**, sited **200+ km offshore** — one of the UK's largest offshore wind farms. Each turbine stands 252 m tall with 108 m blades and a 222 m rotor diameter. Installation was delivered by **Cadeler's Wind Peak jack-up vessel operated by SGRE**, transporting and installing turbine components six at a time since March 2025. **Half of the turbines are fitted with Siemens Gamesa Recyclable Blades and associated components assembled at Green Port Hull, UK**. HVDC distribution system testing and commissioning continues ahead of grid connection. When operational, Sofia will generate enough renewable electricity for ~1.2 million UK homes.

> **NES Sales Opportunity:** Sofia completes RWE's active-installation phase and pivots the project into **long-cycle O&M procurement — a high-value Aberdeen opportunity**. NES **blade-repair specialists, condition-monitoring, vessel charter, ROV, electrical-test, dynamic-cable inspection and HVDC commissioning support firms** should engage RWE's O&M team and Siemens Gamesa's service organisation. The Hull-based Recyclable Blade supply chain is also a structural precedent for AR7 / AR8 RWE projects — Aberdeen polymer, coating and circular-economy firms should engage SGRE's Hull operation directly.

2. Floating Offshore Wind

Spiorad na Mara 900 MW Onshore Planning Application Public for Consultation (8 June 2026)

On **8 June 2026**, following validation, the **onshore planning application and Environmental Impact Assessment Report for the 900 MW Spiorad na Mara offshore wind farm** became public, marking a significant milestone for the project being developed by **Spiorad na Mara Ltd — a partnership of Northland Power and ESB — west of the Isle of Lewis**. The submission to Comhairle nan Eilean Siar covers the Onshore Transmission Works, including the landfall, potential landfall substation, onshore cable route and grid substation. The application was originally submitted on **5 May 2026** and follows years of technical and environmental assessment, community consultation and statutory engagement. **Public representations close 12 July 2026** before planning officers prepare their report against the Outer Hebrides Local Development Plan and national planning policy.

> **NES Sales Opportunity:** Spiorad na Mara is a **flagship ScotWind floating project** and the onshore-works milestone tightens its execution runway. NES firms in **HVAC and HVDC cable engineering, substation EBoP, civils, marine cable installation, geotech, environmental monitoring and Gaelic-/Hebridean-community engagement** should engage Northland Power and ESB's UK supply-chain teams now. The 12 July consultation deadline is also an opportunity for Aberdeen consultancies advising on AONB / EIA mitigation to put expertise in front of the project team. Western Isles port and marshalling capacity (Stornoway, Arnish) will be a contested asset — worth Aberdeen logistics firms scoping early partnerships.

3. Hydrogen

ITM Power Secures £40m GBE Equity and £46.5m DESNZ Grant for 1 GW Chronos Sheffield Line (9 June 2026)

On **9 June 2026**, **ITM Power confirmed a £40m equity investment from Great British Energy alongside a £46.5m DESNZ grant** to underwrite establishment of a new **1 GW automated Chronos electrolyser manufacturing line in Sheffield** — a total UK government endorsement of £86.5m. The Chronos line will install bespoke automated production equipment, catalyst-coated membrane manufacturing, electrode welding, specialist coatings, stack assembly, cleanrooms and integrated test systems, co-located with ITM's existing Trident production line. Total project investment is **up to £120m over three years targeting commercial operation in 2028**. The grant remains subject to subsidy-control scrutiny with a CMA decision expected this month. ITM's improved FY26 cash guidance is now £210–215m. The investment was made under GBE's technology and supply-chain mandate and is reinforced by ITM's status as preferred supplier on two HAR2 projects.

Parallel announcements during the week from **Protium's Pioneer 2 facility in South Wales (2.5 MW, opens 30 June 2026)** — 25× the scale of Pioneer 1 and abating 3,600 tpy CO_2 — underscore the UK green-hydrogen pipeline's scale-up cadence. Protium's acquisition of the 15 MW Cromarty project from Storegga (announced earlier this quarter) remains a high-priority Scottish opportunity, with Protium framing Highlands deployment as a model for distillery, logistics and grid-balancing customers. **Uniper's 120 MW Killingholme FID and the HAR2 award announcements** are also expected within the next 2–3 months — ITM is preferred supplier on two HAR2 projects.

> **NES Sales Opportunity:** The £86.5m Sheffield commitment **anchors UK sovereign electrolyser manufacturing** and accelerates the procurement runway for HAR2 and HAR3 projects. NES **hydrogen safety case, HAZID/HAZOP, BoP packagers, electrical EPC, pipework, compression, water-treatment**

> **and instrumentation firms** should track HAR2 award timing and Killingholme FID directly. Aberdeen consultancies with Sheffield supply-chain links should also engage ITM's Trident and Chronos operations teams as procurement framework selection ramps Q3 2026. The Sheffield manufacturing anchor will compete with European stack suppliers for AR8-hydrogen and HAR3 selections — sovereignty narrative now a procurement criterion.

4. Carbon Capture, Utilisation & Storage (CCUS)

Scottish Parliament Debate Increases Pressure on UK Government to Release Acorn £200m (9 June 2026)

On **9 June 2026**, a Scottish Parliament chamber debate intensified pressure on the UK Government to deliver on its **pledged £200m for the Acorn CCUS project**, noted as still not flowing. The Scottish Government has provided **£3m of grant funding to Acorn** and has continued to engage UK Government counterparts. Acorn is positioned as **Scotland's most mature CCUS opportunity**, anchored at Peterhead, with the UK Continental Shelf described in the debate as having **arguably the largest under-seabed CCUS capacity in the North Sea**. The debate framed Acorn as central to delivering Scotland's just transition and capable of unlocking billions in private investment if the £200m flows. The debate aligns with last week's OEUK CCS & Hydrogen Summit conclusion that scaling North Sea CCS and hydrogen requires clearer policy and stronger investment direction.

> **NES Sales Opportunity:** Acorn remains the **single largest North-East Scotland CCUS opportunity** but Tier 1/2 procurement remains gated on UK funding confirmation. NES **subsea pipeline EPC, well-integrity, CO_2 monitoring, MMV, FEED and process-engineering firms** should maintain Acorn-ready capability statements and engage Storegga, Shell and Harbour's Acorn team directly. Parallel Track-1 (East Coast Cluster, HyNet) procurement activity continues to provide live revenue today — Aberdeen consultancies should hedge by maintaining cross-cluster bids. The political tempo on Acorn suggests an announcement window opens late summer / autumn 2026 as UK Government pressure builds ahead of party conferences.

5. Marine & Tidal

BHA Calls for Tidal Range to Be Treated as Strategic National Infrastructure (9 June 2026)

On **9 June 2026**, the **British Hydropower Association (BHA) published Tidal Range: Power, Protection, Permanence** — a manifesto arguing tidal range hydropower should be reclassified as **strategic national infrastructure** on a par with grid, water and transport networks. The BHA quantifies **more than 20 GW of technically viable UK tidal range resource** concentrated in the Severn Estuary, Irish Sea and west coast, with asset lifetimes >100 years and **UK content levels of 60–80%**. The brochure showcases ten development-stage projects including **West Somerset Lagoon, Mersey Tidal Power, Swansea Tidal Lagoon, Mostyn SeaPower, North Wales Tidal Lagoon, Centre Port UK in The Wash, and concepts in Morecambe Bay and the Solway Firth**. The BHA proposes the **Regulated Asset Base (RAB) financing model** as the route to investment, recognising tidal range's flood-protection, regeneration and grid-stability benefits.

In a parallel Welsh development, **Natural Resources Wales' marine licence variation for Morlais now allows Tidal Technologies Ltd to deploy its TT2 twin vertical-axis turbine at 3 MW demonstrator scale in 2027**, with an additional 27 MW pencilled in. The Morlais zone is consented for up to 240 MW; CfD-backed tidal stream now totals 140 MW UK-wide, with three of four AR6 winners (HydroWing 10 MW, Môr Energy 5.5 MW, Tidal Technologies 3 MW) sited at Morlais. AR7-era tidal stream cleared at ~£265/MWh (2024 prices).

> **NES Sales Opportunity:** The BHA push for RAB-model tidal range and the live Morlais pipeline reopen a **high-value NES opportunity for civils, marine cable, foundation, gate/turbine engineering and environmental monitoring firms** — particularly Aberdeen consultancies with subsea engineering and ScotWind project-management experience. Solway Firth concept projects will pull Scottish supply chain into the southwest Scotland → north-west England axis. NES firms should track BHA member engagement on Severn / Mersey / North Wales projects and position against tier-1 EPCM contractors before any RAB framework decision in 2027.

6. Geothermal

Northern Ireland Opens Consultation on New Geothermal Licensing Regime (11 June 2026)

On **11 June 2026**, the **Department for the Economy (Northern Ireland) opened consultation on a new geothermal regulatory and licensing regime** — a 58-page consultation that closes on **7 August 2026**. Key proposals: the regime would apply only to **geothermal heat below 100 metres in depth**; most small domestic installations would not require a licence; larger or deep geothermal developments would require a licence subject to **joint review by DfE (financial / operator capability) and Geological Survey of Northern Ireland (technical feasibility and geological risk)**; geothermal heat below 100 m would be vested in the state on the Netherlands / France model; public consultation and environmental assessment would be required. The regime is positioned alongside a parallel NI heat-networks framework and the legally binding 2050 net zero target. The framework does **not propose grants or subsidies** — it is a permitting and licensing regime only.

In England, **Geothermal Engineering Ltd's United Downs plant near Redruth, Cornwall has been delivering 3 MW of 24/7 baseload geothermal electricity to Octopus Energy since February 2026** — the first commercial 24/7 geothermal electricity in UK history. The plant also produces 100 t/yr of battery-grade lithium carbonate as a co-product. The UK's deepest-ever borehole (3.3 miles) was drilled here.

> **NES Sales Opportunity:** The NI consultation creates a **two-stage NES sales opportunity**: (1) Aberdeen geoscience / geomechanics consultancies and well-services firms should respond to the consultation as expert respondents to build credibility with DfE and GSNI; (2) deep-geothermal licensing precedent in NI is a structural precursor to a similar GB framework, where Aberdeen subsurface skills (drilling, completions, well integrity, reservoir engineering) translate directly. Aberdeen consultancies should also engage United Downs / GEL on Cornwall replication opportunities, where O&G transferable skills are increasingly mobilised. EAGE Annual Conference at P&J Live (8–11 June) is the immediate networking opportunity.

7. Decommissioning

CNOOC Awards ABB Buzzard Automation Modernisation Contract (11 June 2026)

On **11 June 2026**, **ABB was awarded a contract by CNOOC Petroleum Europe to modernise automation and safety control systems on the Buzzard offshore platform** — one of the UK's largest producing oil fields. The contract covers upgrade of ABB's existing System 800xA distributed control system and Safeguard 400 safety system through a **phased modernisation programme designed to allow the facility to remain online during the upgrade**. The award extends Buzzard's operational life, deferring the decommissioning timeline but reinforcing the trend toward **automation, digital obsolescence-management and condition-based maintenance contracts** for late-life UKCS assets. CCS Well Approvals data published 12 June by Enverus also indicates a growing UK CCS-well permitting queue, even while application rates ease — a positive signal for legacy-well conversion procurement timelines.

NES Sales Opportunity: Late-life asset modernisation and life-extension contracts **are the precursor revenue stream** to eventual decommissioning awards. NES **automation, instrumentation, cybersecurity, SCADA, control-room modernisation, asset integrity and inspection firms** should engage CNOOC, ABB and the wider UKCS operator base on life-extension scope. Aberdeen consultancies should also track the parallel **CCUS legacy-well conversion opportunity** — the growing CCS well-permit queue means UKCS well-integrity expertise from O&G is in increasing demand for both decommissioning and CCS-conversion workstreams.

8. Hydropower & Pumped Storage

LDES Investment Spotlight Ahead of Ofgem Minded-To Decisions and RheEnergise £8.25m Devon Demonstrator (11 June 2026)

On **11 June 2026**, BBC and ESS News coverage spotlighted the UK's pumped-storage and LDES build-out ahead of Ofgem's upcoming cap-and-floor minded-to decisions. Two specific UK developments stand out: a Scottish pumped-storage proposal described as **the first large-scale UK pumped storage in more than 40 years**, which would more than double GB's existing storage capacity if approved; and **RheEnergise's £8.25m Net Zero Innovation Portfolio grant** for its **High-Density Hydro demonstrator at Cornwood, near Plymouth** — a 500 kW pilot using a fluid 2.5× the density of water, enabling pumped-storage installations on hills as low as 100 metres, scalable to 300 MW+. The technology offers LDES from 8 hours to 8 days. The week also saw broader UK consolidation in the BESS pipeline, including Eelpower Energy's 50 MW UK BESS acquisition and additional Fidra portfolio expansion, all positioning ahead of the Ofgem decision.

NES Sales Opportunity: Ofgem's LDES cap-and-floor minded-to decisions are now **the single most important UK storage-investment catalyst of 2026**. NES **civil construction, electromechanical packagers, tunnel, dam, electrical EPC, SCADA and grid-connection consultancies** should be Coire Glas / Earba / Cruachan / Loch na Cathrach / Balliemeanoch-ready with capability statements in front of SSE, Drax, Statkraft, Gilkes, ILI Group, Glenmuckloch and Intelligent Land Investments. RheEnergise's Cornwood pilot validates a new asset class for which the company will procure detailed-engineering and BoP at 3 MW → 300 MW scale through 2027–29 — Aberdeen pumped-storage engineering firms should engage early. The Ofgem decision will trigger a 6–9 month rush of FID-aligned procurement — readiness now is critical.

9. Policy & Regulatory Developments

National Grid Submits £4.5bn RIIO-T3 Re-opener Proposals to Ofgem (3 June 2026, public 8 June)

National Grid has submitted **25 proposals to Ofgem under the RIIO-T3 re-openers process, seeking ~£4.5bn of strategic investment** across its electricity transmission network in England and Wales — made public on **8 June 2026**. The submission is a foundational milestone for the 2026–2031 RIIO-T3 price control. Separately on **8 June**, Ofgem closed and approved its **RIIO-2 Network Asset Risk Metric (NARM) methodology review** — modifying special licence conditions across electricity transmission, gas transmission, and gas distribution to improve risk-assessment consistency and traceability. On **11 June**, Ofgem opened a statutory consultation on **RIIO-ED2 Load Related Expenditure volume drivers** (closes **9 July 2026**), proposing upward revisions to Low Voltage Services and Secondary Reinforcement volume drivers and higher ex-ante allowances for all DNOs — a direct signal of accelerated distribution-network investment ahead of ED3.

Ofgem also confirmed on **11 June** it is preparing reforms to address **data centres reserving grid capacity years before fully needed** — reflecting growing tension between renewables connection queues and data-centre demand. Together with last week's Ofgem Bill Discount Scheme and ED3 SSMD, the regulator's tempo points to a busy autumn statutory window.

> **NES Sales Opportunity:** The £4.5bn RIIO-T3 re-opener and accelerating ED2 / ED3 spend trajectory create **a multi-year procurement tailwind for NES grid-connection, civils, EBoP, environmental, planning, cable and substation engineering firms**. Aberdeen consultancies advising SSEN-T, SP Energy Networks and National Grid Electricity Transmission on T3 deliverables should engage RIIO-T3 procurement teams now. The 9 July ED2 consultation deadline is a substantive opportunity for NES DNO supply-chain firms to influence unit rates. Track the data-centre / connection-queue reform as a procurement-prioritisation signal: connection-acceleration policy could re-rank developer pipelines through Q4 2026.

10. Key Upcoming Events for NES Companies

Event	Date	Location	Relevance
Global Offshore Wind 2026 (RenewableUK)	16–17 June 2026	Manchester Central	Full offshore wind value chain — AR7/AR8 procurement positioning, Sofia + Morgan visibility
ITM Power FY26 Results / HAR2 award window	June 2026	Online / Sheffield	HAR2 award timing + Chronos line FID confirmation
Ofgem ED2 LRE Volume Drivers Consultation	9 July 2026	Online (Ofgem)	DNO and distribution-network supply chain
Crown Estate Supply Chain Accelerator R3 Deadline	3 July 2026	Online	Final application date for £15m UK offshore wind supply chain fund
Morgan Offshore Wind Tender Launch	July 2026	Online (Crown Estate)	New 1.5 GW tender — supply-chain RFI signal for next 18 months
Ofgem LDES Minded-To Decisions	June 2026	Online	Cap-and-floor LDES project selection — pumped storage + BESS
CfD Allocation Round 8 (AR8) Opens	July 2026	Online (DESNZ)	Wind / hydrogen / floating / ODOW CfD bidding window opens
NI Geothermal Licensing Consultation Closes	7 August 2026	Online (DfE NI)	Aberdeen subsurface / geomechanics consultancies submit responses
Spiorad na Mara Onshore Planning Consultation	12 July 2026	Comhairle nan Eilean Siar	Western Isles 900 MW ScotWind — EIA / engagement window
Floating Offshore Wind 2026	7–8 October 2026	P&J Live, Aberdeen	RenewableUK floating wind summit — ScotWind procurement positioning

11. Grant Funding & Support Mechanisms Active This Week

Fund / Mechanism	Value	Deadline	Eligible NES Companies
Crown Estate Supply Chain Accelerator Round 3	£15m total — 50% match £250k–£2m per project	3 July 2026	UK fixed and floating offshore wind supply chain firms, plus port/port-related infrastructure
GBE Supply Chain Fund	Up to £300m capital	10 December 2026	Manufacturers of offshore wind components, cables, foundations, nacelles
GBE / DESNZ — ITM Power Chronos package	£86.5m UK government commitment	Subsidy-control decision June 2026	Sheffield-supply-chain mechanical, electrical, automation, instrumentation, cleanroom firms
Offshore Wind Growth Partnership Industrial Growth Fund	£300k – £25m per project	Rolling	Supply chain firms expanding or building offshore wind manufacturing
CCUS Innovation 2.0 — Built Environment Sequestration	Innovation grant	2026 round open	Carbon-storage innovators incl. mineralisation and monitoring
UK Hydrogen Allocation Round 2 (HAR2)	CfD-style revenue support	Decisions expected mid-2026	Electrolyser integrators, EPC contractors and ITM/Protium/Uniper supply chain
LDES Cap and Floor (Ofgem)	Revenue support framework	Minded-to decisions June 2026	Pumped storage hydro developers and Scottish civil / electrical supply chain
Net Zero Innovation Portfolio — RheEnergise model	£8.25m awarded; framework live	Rolling competitions	Small-business innovators in LDES, high-density hydro, novel storage

12.

Sales Opportunity Summary for NES Supply Chain Companies

Sector	Opportunity	Timing	Priority
Fixed Wind	Morgan 1.5 GW Irish Sea re-tender — Crown Estate launches July, awards late 2026	Urgent	★★★★★
Fixed Wind	AR8 final response confirmed — FLOW longstop, ODOW, hybrid metering — 30–45-day sub-contract sprint	Urgent	★★★★★
Fixed Wind	Sofia 1.4 GW complete — RWE O&M procurement pivot + SGRE Hull Recyclable Blade engagement	Now–2030s	★★★★★
Hydrogen	£86.5m ITM Sheffield Chronos line + HAR2 awards — BoP / safety case / electrolyser supply chain	Now	★★★★★
Hydropower	Ofgem LDES minded-to decisions June — Coire Glas / Earba / Statkraft / RheEnergise engagement	Immediate	★★★★★
Floating Wind	Spiorad na Mara 900 MW onshore planning live + Sonardyne/AMOG mooring monitoring	Now–2030s	★★★★★
CCUS	Acorn £200m political pressure builds — keep Storegga / Shell / Harbour capability statements warm	Q3–Q4 2026	★★★★★
Policy	National Grid £4.5bn RIIO-T3 + ED2/ED3 — DNO supply chain procurement tailwind	2026–2028	★★★★
Decommissioning	CNOOC/ABB Buzzard modernisation + late-life automation contracts + CCS well conversion	Now	★★★★
Marine / Tidal	BHA RAB tidal range manifesto + Morlais TT2 deployment in 2027 — civils/marine engagement	2026–2028	★★★★
Geothermal	NI DfE consultation (closes 7 August) + EAGE Aberdeen + United Downs/GEL replication	Now–2030	★★★
Funding	Crown Estate Supply Chain Accelerator R3 — £15m, 50% match, applications close 3 July	Urgent	★★★★★

This briefing covers the period 7 – 13 June 2026. All opportunity ratings reflect proximity, scale, and fit with typical NES Tier 2/3 company capabilities. This briefing is prepared by ExportCentral AI for use by North East Scotland energy supply sector participants.

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