UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 29 August 2026

Coverage Period	Audience	Classification
23 – 29 August 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 29 August 2026 delivered the largest single-campaign North Sea decommissioning close-out of the year, a UK BESS commissioning and consenting cluster, and a policy squeeze that will directly shape NES Tier 2/3 sales conversations into Q4.

Spirit Energy confirmed on 25 August that it has completed a £40 million programme (also cited at over £55 million all-in) removing more than 234 tonnes of subsea infrastructure and plugging three wells across three UK North Sea assets (Seven Seas 60 km off East Yorkshire, and the Grove G5 and Grove Deep exploration wells 131 km east of Norfolk), using DeepOcean's Edda Freya construction support vessel with Well-Safe Solutions' Protector jackup rig. The jackup has now returned to Aberdeen. More than 114,000 offshore work-hours were delivered and 30-plus UK supply-chain partners were engaged, with 100% of recovered material sent to UK yards. This is the clearest week-to-week UK decommissioning proof point of 2026 for NES firms in rigless P&A, subsea cutting, ROV support, dredging and cathodic protection.

On the low-carbon build-out, Masdar started up its second UK BESS on 24 August — the 35 MW / 70 MWh Rochdale project financed by SMBC and ING (£97 million facility), and now part of Masdar's £1 billion, 3 GWh UK BESS programme. Field secured Scottish planning consent on 25 August for the Rigifa 200 MW / 3,600 MWh 18-hour BESS — an anchor Long Duration Electricity Storage cap-and-floor candidate, alongside Field's parallel New Deer 400 MW / 7,200 MWh and 39 MW / 200 MWh Keith projects in Scotland. Low Carbon secured DESNZ consent on 25 August for the Beacon Fen 400 MW solar plus co-located 600 MW BESS project in Lincolnshire — the first major energy consent signed off by Energy Secretary Miatta Fahnbulleh.

Offshore, TotalEnergies signed a long-term REGO-backed offtake on 27 August for a share of the 367 MW Walney I and II Irish Sea wind farms (Ørsted-operated, Offshore Partners Walney 24.8%). Ardersier Port confirmed a MoU with a leading Chinese offshore-wind OEM on 24 August.

In-window trade press through 25 August also positioned Cadeler's H1 2026 update as evidence that the Menck deal is now complete, Wind Ace was delivered on 17 July on time and budget, and a EUR 247 million Wind Apex financing has closed — flagging a structural foundation-vessel supply gap opening from 2030-31.

On policy, Ofgem confirmed on 26 August that the domestic energy price cap will rise 4% from 1 October (typical annual bill £1,723; wholesale gas up 11%; still 52% below the 2022 peak) — the sharpest rise in three years. Prime Minister Andy Burnham responded on 27 August that he will remove VAT from electricity bills as his government's first energy policy, and Scottish First Minister John Swinney called for urgent action and devolution of energy powers.

The Guardian reported on 23 August that England onshore wind applications have hit a ten-year high since the July 2024 ban lift, with 438 MW of English applications this year (Scotland 5,280 MW proposed, Wales 490 MW). DESNZ published the monthly Energy Trends and Prices statistical release on 27 August. SSEN Transmission confirmed final Section 37 approval for the Cambushinnie 400 kV substation as part of the Beauly-Denny upgrade

(£500,000 community fund), and SSE plc reported a record £24.9 million community investment for FY26 across 1,284 UK and Ireland renewables, transmission, distribution and thermal projects (27 August).

Time-critical NES focus: Rosebank and Jackdaw ministerial decisions still with Fahnbulleh; Ofgem LDES autumn awards approaching; AR8 NESO qualification runs to 16 September; GBE Supply Chain Fund Round 3 closes 30 September.

1. Offshore Wind — Fixed Bottom

TotalEnergies signs REGO-backed offtake for share of 367 MW Walney I and II offshore wind farms (27 August 2026)

TotalEnergies Gas & Power announced on 27 August a long-term REGO-backed power purchase agreement with Offshore Partners Walney (OPW) for their share of generation from the 367 MW combined Walney I and Walney II Irish Sea offshore wind farms through 2030. OPW is a 24.8% partner alongside operator Ørsted (50.1%), with the balance held by PKA and the Public Sector Pension Investment Board. The offtake covers renewable electricity plus Renewable Energy Guarantees of Origin certificates that TotalEnergies will use to supply UK industrial and commercial customers. TotalEnergies is also active on the developer side of UK offshore wind through its 20% stake in the 2 GW Seagreen and 4.1 GW Outer Dowsing offshore wind farms and Attentive Energy (Round 6). Walney I and Walney II have been operational since 2011-2012 and are cornerstone Irish Sea assets — the extended REGO-backed offtake underlines the continued attractiveness of long-life fixed-bottom UK offshore wind PPAs for commercial and industrial buyers as the merchant tail of AR2 and pre-CfD assets deepens.

> **NES Sales Opportunity:** The Walney offtake confirms continued UK operational offshore wind O&M workload and reinforces the Irish Sea corridor as an active NES sales patch. NES Tier 2/3 firms in HV subsea cable services, cathodic protection, turbine access, coating repair, marine warranty, ROV inspection and rope-access blade repair should approach Ørsted UK (Grimsby / London / Aberdeen), Offshore Partners Walney and TotalEnergies Gas & Power procurement for scheduled outage windows and rotable-part fabrication scope through 2030.

Ardersier Port signs MoU with Chinese OEM for UK and European offshore-wind manufacturing (24 August 2026)

The Herald and international trade press reported on 24 August that a leading Chinese wind-turbine manufacturer has signed a memorandum of understanding with Ardersier Port (Haventus) near Inverness — the largest offshore-wind marshalling and manufacturing port in the UK — to support delivery of UK and European offshore-wind projects. The MoU signals a widening non-European supply base into Scottish ports and, if converted to firm contracts, would sit alongside the port's already-announced work packages with Iberdrola/ScottishPower, Sumitomo and other developers. Ardersier is under £300 million-plus regeneration, targeting up to 3,000 direct jobs. The trade coverage stops short of naming the Chinese OEM but positions the deal as one of the first UK marshalling anchors for Chinese offshore-wind turbine content.

> **NES Sales Opportunity:** The Ardersier MoU signals that Scottish port marshalling is now openly courting non-European turbine content — sharpening the case for locking in local supply chain LOIs before UK-content bar shifts. NES Tier 2/3 firms in coatings, structural steel, hazardous-area electrical rigging, marine

> coordination and mechanical fabrication should approach Haventus/Ardersier Port procurement and the named international OEMs pursuing Ardersier work packages this quarter. Aberdeen turbine-related engineering capacity remains relevant to marshalling scope regardless of OEM origin.

Cadeler H1 2026 signals foundation-vessel supply gap emerging by 2030-31 (in-window trade coverage 25 August 2026)

Cadeler's H1 2026 update, covered in UK and international trade press through 25 August, confirms the Menck acquisition is now complete, the Wind Ace foundation-installation vessel was delivered on 17 July on time and budget, and a EUR 247 million financing for Wind Apex has closed. Cadeler CEO Mikkel Gleerup flagged that vessel-installation demand is on track to cross above vessel-installation supply by 2030-31, particularly for the very-large-diameter monopile transition ahead. The signal is directly relevant to UK AR8- and Round 6-era foundation installation programmes and to floating substructure marshalling positioning. Cadeler continues to secure long-term contracts across Europe and the US and remains the incumbent Tier 1 foundation-vessel provider for UK Round 3 and post-Round 3 fixed-bottom offshore wind projects.

> **NES Sales Opportunity:** The Cadeler read is that UK foundation-installation supply chain will tighten from 2030-31 — a signal to NES firms to lock in Tier 2 supply positions now. Approach Cadeler (London / Copenhagen), Menck (Ellerau), Van Oord, DEME Offshore and Seaway7 for foundation-installation sub-contract scope in monopile secondary steel, transition-piece access, hazardous-area electrical, coatings, cathodic protection, marine warranty and ROV inspection. Priority is Aberdeen and Nigg-adjacent supplier positioning for East Anglia THREE follow-on work and future AR8 East Anglia and Round 6 fabrication.

AR8 CfD NESO qualification window remains active to 16 September 2026 (August 2026)

The eighth Contracts for Difference Allocation Round (AR8) continues in the NESO qualification assessment phase from 10 August to 16 September 2026 across all pots, including Pot 3 (fixed-bottom offshore wind) and Pot 4 (floating offshore wind and Other Deepwater Offshore Wind). AR8 is the first allocation round to require Gate 2 (or Gate 1 CPCR) connection status. The DESNZ Contract Budget Notice is expected in November. Results will be announced across all technologies between 27 November 2026 (earliest) and 17 February 2027 (latest). Clean Industry Bonus applies across all AR8 offshore-wind categories, so UK content evidence remains decisive at bid.

> **NES Sales Opportunity:** The next fortnight is decisive for locking in Tier 1 EPCI and OEM sub-contract Letters of Intent for AR8 Pot 3. NES firms should confirm commitments across foundation fabrication, dynamic cabling, offshore substation electrical, hazardous-area electrical, coatings, marine coordination and topsides commissioning with ScottishPower Renewables, SSE Renewables, Ocean Winds, Iberdrola, Vattenfall, Equinor and the Ossian JV (SSE/CIP/Marubeni). Aberdeen developer offices remain the direct engagement points.

2. Floating Offshore Wind

UK floating pipeline holds through the week to 29 August — Gwynt Glas and Celtic Sea remain anchor references (August 2026)

UK floating offshore wind trade coverage this week continued to build on the mid-August Sumitomo 33.3% Gwynt Glas transaction and the wider Celtic Sea pipeline (Gwynt Glas 1.5 GW EDF/ESB/Sumitomo; Erebus Blue Gem Wind test project; Llyr and further Crown Estate Round 5 sites). The Telegraph's 21 August analysis — Britain turns to floating wind farms as it runs out of shallow waters — continued to circulate in UK industry channels through the week ending 29 August as background context for the Round 5 to Round 6 transition. The Crown Estate has targeted 4.5 GW of Celtic Sea floating by 2035 and 12 GW by 2045, with Gwynt Glas roughly a third of the first-phase target. INTOG and ScotWind floating leases sit alongside as the mid-decade Scottish floating anchor. No new UK floating consent, planning or contract event was published in this week's window, but developer supplier-qualification cycles remain live.

> **NES Sales Opportunity:** UK floating remains the strategic growth engine into 2028. NES firms should treat floating supply-chain positioning as a strategic priority. Prioritise EDF/ESB/Sumitomo (Gwynt Glas), Cenos, MarramWind, Salamander, Green Volt, Ossian JV and Aker Solutions engagement, and confirm pitch materials ahead of the 7–8 October Floating Offshore Wind Conference in Aberdeen. Focus scope: floating foundation fabrication, mooring, dynamic array cable, floating substation electrical, HV commissioning, marine coordination and marine warranty.

3. Hydrogen

Nobian and Air Products RFNBO hydrogen deal supports UK zero-emission flight (27 August 2026)

Hydrogen Europe and international specialist press reported on 27 August that Nobian and Air Products have signed a long-term supply agreement for renewable fuels of non-biological origin (RFNBO) hydrogen — with Rotterdam-produced hydrogen (approximately 14,000-plus tonnes per annum) to be liquefied by Air Products and used to support UK zero-emission commercial flight development. The offtake is a European-origin arrangement, but is being widely cited as an anchor UK aviation decarbonisation feedstock alongside domestic HAR1 and HAR2 electrolytic hydrogen. The deal underlines that near-term UK aviation hydrogen offtake will be a hybrid domestic-and-imported market through 2030 while HAR1 electrolysers move to FID and HAR2 awards land later in 2026.

> **NES Sales Opportunity:** Aviation hydrogen offtake for UK use is now visibly moving through European suppliers — sharpening the case for HAR2 and HAR3 domestic-supply positioning. NES firms in cryogenic systems, hazardous-area electrical, high-integrity welding, mechanical fabrication, coatings and specialist QHSE should approach Air Products UK, ZeroAvia, Airbus and UK airport operators (Heathrow, Edinburgh, Aberdeen International) on airside hydrogen fuelling infrastructure scope, and Veri Energy/EnQuest (Sullom Voe), Scottish Power/Storegga (Cromarty) and Ineos (Grangemouth) on HAR2 domestic-production sub-contracts.

HAR2 electrolytic hydrogen contract awards remain scheduled for later in 2026 (August 2026)

HAR2 (Hydrogen Allocation Round 2) contract awards remain scheduled for later in 2026, with no material published movement in the week to 29 August. HAR2 will award new electrolytic hydrogen contracts building on the December 2023 HAR1 portfolio. Scottish HAR2 candidate sites include Sullom Voe (Veri Energy/EnQuest) and Cromarty and Grangemouth (Ineos, Scottish Power/Storegga). HAR3 process design continues, with market engagement flagged into H2 2026. Hydrogen production and industrial demand remain anchor priorities within DESNZ's Modern Industrial Strategy. The Hydrogen Energy Association's State of the Hydrogen Nation position remains the industry reference.

4. CCUS

Track 1 CCS mobilisation continues at HyNet Liverpool Bay and Northern Endurance Partnership (August 2026)

The Liverpool Bay CCS project — the first UK carbon storage project to repurpose existing infrastructure — continues its Crown Estate lease-anchored mobilisation under Eni CCUS Holding, ahead of a first CO2 injection scheduled for 2028. Northern Endurance Partnership offshore construction at Hartlepool (Saipem-led 149 km subsea CO2 pipeline) also continues, with NEP having now awarded over £2 billion to more than 260 UK companies. Track 1 first CO2 injection remains targeted for 2028. Track 2 (Acorn, Viking) awaits final development consent, with Acorn Peterhead expected to reach FID in 2026. No major new UK CCUS consent event was published in the 23-29 August window, but supply-chain qualification and Track 2 pipeline design remain active.

> **NES Sales Opportunity:** Track 1 supply-chain window remains open through mobilisation. NES firms with subsea pipeline installation, ROV support, geotechnical, high-integrity welding, coatings, marine coordination and NDT credentials should continue to approach Saipem (Aberdeen and London), Eni CCUS Holding, Wood, Petrofac and Worley procurement. Track 2 positioning (Acorn Peterhead and Viking Humber) remains open through 2027. Aberdeen firms with subsea gas-field decommissioning credentials have directly transferable capability into UK CCUS pipeline installation and storage-well construction.

Guardian analysis positions Rosebank climate cost at 88% of UK North Sea impact (25 August 2026)

The Guardian published an analysis on 25 August by Imperial College's Dr Luke Hatton estimating that the seven major undeveloped UK North Sea oil and gas fields (Rosebank, Jackdaw and five others) would generate between £119 billion and £336 billion in global climate damages — with Rosebank accounting for around 88% of the total. The analysis contrasts against OEUK-cited operator gross value added of £28.7 billion. Adura and Ithaca Energy responses noted that operator estimates of UK gross value added, tax revenues and jobs remain material to any comparative assessment. The Rosebank and Jackdaw ministerial decisions by Energy Secretary Miatta Fahnbulleh continue to be expected within weeks. Guardian and other UK press this week noted that Prime Minister Andy Burnham could approve Jackdaw while blocking Rosebank if the ministerial decision is split along field-specific lines.

5. Marine & Tidal

UK marine and tidal news pipeline stable during the week to 29 August — EMEC, CorPower and Orbital remain reference points (August 2026)

The UK marine and tidal delivery pipeline held steady through the week ending 29 August, with continued 2026 reference points from CorPower Ocean's C4 wave energy converter with DNV certification, EMEC Orkney demonstrator deployments, Orbital Marine Power's Fall of Warness tidal work, and Marine Energy Wales activity around the Menter Môn Morlais Tidal Demonstration Zone. Marine Energy Council policy engagement continues to focus on Contracts for Difference Pot 2 tidal-stream access and the AR8 Pot 4 mechanism. No new in-window UK marine or tidal award or consent was published this week, but supply-chain qualification cycles at EMEC, CorPower, Orbital and Mocean Energy remain live.

> **NES Sales Opportunity:** Marine and tidal remains an adjacent-market opportunity for NES firms with floating platform, mooring, cabling, marine coordination and offshore commissioning credentials. Mocean Energy Edinburgh, CorPower Ocean, EMEC Orkney and Orbital Marine Power remain the priority Scottish engagement points. Keep marine and tidal in monthly sales pipeline reviews — the CfD Pot 2 tidal-stream ring-fence is under active review.

6. Geothermal

Cornish Lithium DRIVE 35 Cross Lanes geothermal grant now in delivery phase (August 2026)

Cornish Lithium's £7.2 million DRIVE 35 government grant for the Cross Lanes Geothermal Lithium project near Chacewater, Cornwall (announced 12 August) continues in delivery phase through the week ending 29 August, with no new material announcement in this reporting window. The programme is match-funded and forms part of a wider £14.5 million DRIVE 35 package. Cornish Lithium plans to drill two 2,000 m production wells, operate a Direct Lithium Extraction (DLE) demonstration plant at Cross Lanes and drill an appraisal well at the nearby Baldhu site. Extended reservoir testing will validate sustainable production conditions and assess water reinjection rates. This remains the first UK deep-geothermal lithium project to secure DRIVE 35 backing and is the reference UK critical-minerals geothermal build-out.

> **NES Sales Opportunity:** The Cross Lanes DRIVE 35 grant continues to unlock a UK deep-geothermal drilling campaign directly transferable to UKCS wells expertise. NES firms with deep drilling, downhole tools, wireline, cementing, HV electrical, mechanical fabrication, welding, coatings, HSE and integrated well engineering should approach Cornish Lithium procurement (Redruth), APC (Coventry) and Innovate UK immediately. Aberdeen wells and DLE-adjacent process engineering are directly transferable and Cross Lanes will be a repeat funder for the same capability areas through 2028.

7. Decommissioning

Spirit Energy completes £40 million North Sea decommissioning campaign — 3 wells P&A’d, 234+ tonnes recovered (25 August 2026)

Spirit Energy confirmed on 25 August the completion of a landmark £40 million (also cited at £55 million all-in) North Sea decommissioning programme across three assets: the Seven Seas gas field 60 km off the East Yorkshire coast, and the Grove G5 platform well and Grove Deep exploration well 131 km east of Norfolk. The campaign, delivered through 2025 and 2026, removed more than 234 tonnes of subsea infrastructure and plugged and abandoned three wells. Delivery combined DeepOcean’s Edda Freya construction support vessel with Well-Safe Solutions’ Protector jackup rig — the Protector has now returned to Aberdeen. Spirit reported more than 114,000 offshore work-hours delivered by 30-plus UK supply-chain partners, with 100% of recovered materials sent to UK yards for onward recycling. Combined lifetime gas production from Seven Seas and Grove G5 exceeded 56 Bcf. The campaign is one of the clearest UKCS proof-points for combined vessel-plus-jackup rigless P&A execution.

> **NES Sales Opportunity:** The Spirit Energy campaign is the clearest single-week UK NES supply chain confirmation of vessel-plus-jackup rigless P&A as commercial default. NES firms in rigless P&A, subsea cutting, dredging, ROV support, cathodic protection, high-integrity welding, coating removal, waste-stream engineering, structural surveying and QHSE should approach Spirit Energy (Aberdeen), DeepOcean Aberdeen, Well-Safe Solutions (Aberdeen), Boskalis Subsea, Petrogas E&P and INEOS Energy Europe procurement for framework and sub-contract inclusion this month. The Well-Safe Protector’s return to Aberdeen re-arms the local rigless P&A stack.

Guardian climate-damage analysis on Rosebank re-frames UK North Sea decommissioning economics (25 August 2026)

Alongside the Spirit Energy campaign close-out, the Guardian’s 25 August Imperial College analysis of climate damages from the seven major undeveloped UK North Sea fields (Rosebank at approximately 88% of a £119-336 billion damages envelope) has re-framed the political economics of continued UKCS production versus accelerated decommissioning. OEUK, Adura and Ithaca Energy have all restated the operator gross-value-added case. The trade-press consensus this week is that ministerial signal on Rosebank and Jackdaw will materially shape the UKCS 2027-2032 decommissioning workbook: a Rosebank block plus Jackdaw approval would keep late-life extension viable at Adura, while a full block would accelerate decommissioning across combined assets.

NSTA UKCS Decommissioning Charter delivery continues (August 2026)

Follow-on UK trade coverage of the NSTA's 13 August UKCS Decommissioning Cost and Performance Update and 17-operator Well Decommissioning Charter continued through the week ending 29 August, with the record £2.6 billion 2025 UKCS decommissioning spend (£1.3 billion on wells), the backlog of around 500 UKCS wells awaiting final abandonment, and more than 1,000 additional wells expected over the next five years remaining industry reference figures. Analysts continue to cite a potential 30% cost reduction from vessel-based versus rig-based P&A campaigns — directly validated by the Spirit Energy campaign this week. The 17-operator Charter (INEOS Energy Europe, Shell UK, Adura, Eni UK and 13 others) remains the industry commitment device to unlock accelerated execution.

8. Hydropower & Pumped Storage

Field secures Scottish planning consent for 200 MW / 3,600 MWh Rigifa 18-hour BESS (25 August 2026)

Field secured Scottish planning approval on 25 August for its Rigifa 200 MW / 3,600 MWh 18-hour BESS project — a UK anchor Long Duration Electricity Storage cap-and-floor candidate. Rigifa is one of five Field development projects totalling 1.6 GW / 26.8 GWh; the parallel Scottish pipeline includes Field New Deer at 400 MW / 7,200 MWh (also progressing) and Keith at 39 MW / 200 MWh (already in-flight). Rigifa specifically targets Ofgem's LDES cap-and-floor Window 1 and any subsequent windows for durations above eight hours. Field CEO Amit Gudka positioned the consent as a proof-point that Scottish planning authorities can move 18-hour BESS through the process at pace. Rigifa's consent joins the SSE Renewables Coire Glas 1,440 MW, Statera Loch Kemp 660 MW and Gilkes Earba 1,800 MW pumped storage schemes as headline Scottish LDES anchors.

> **NES Sales Opportunity:** The Field Rigifa consent, and Field's wider 1.6 GW / 26.8 GWh Scottish pipeline, is a decisive UK NES BESS supply chain signal. NES Tier 2/3 firms in BESS enclosure fabrication, HV electrical, thermal management, fire protection, hazardous-area electrical, cyber-secure control systems, protective coatings, civils and QHSE should approach Field (London), preferred BESS EPC framework holders (Wartsila, Fluence, Tesla Megapack integrators) and DNO/NESO connection engineering partners immediately. Aberdeen-adjacent supplier positioning at New Deer, Keith and Rigifa is directly transferable to SSE (Coire Glas), Statera (Loch Kemp) and Gilkes (Earba).

Masdar commissions 35 MW / 70 MWh Rochdale BESS with SMBC and ING financing (24 August 2026)

Masdar commissioned its second UK BESS on 24 August — the 35 MW / 70 MWh Rochdale project — supported by a £97 million financing facility co-arranged by SMBC and ING. The project is part of Masdar's £1 billion UK BESS programme targeting 3 GWh of capacity. Masdar's UK pipeline (with Arlington Energy) includes Bramley (335 MW at Deutsche Bank and Investec finance), the operational London Gateway 30 MW / 45.6 MWh (Q1 2025) and other UK projects. Financial close on Rochdale confirms that UK Li-ion BESS projects with 2:1 hour duration and 30-40 MW power ratings remain financeable at scale with a mix of European and Middle Eastern capital.

> **NES Sales Opportunity:** The Rochdale close is the clearest ongoing signal that UK Li-ion BESS financing volume continues into H2 2026. NES firms should approach Masdar UK / Arlington Energy (London), SMBC and ING project finance partners, plus BESS EPC framework holders, on ongoing O&M and O&M-adjacent scope for Rochdale (HV electrical, control-system integration, fire protection, thermal management, cyber-secure SCADA). Directly transferable to Fidra, Zenobe, Statera, Frontier, Field, Harmony, NextEnergy and Econergy portfolios.

Low Carbon secures DESNZ consent for 400 MW Beacon Fen solar + 600 MW BESS — Fahnbulleh's first major energy consent (25 August 2026)

Low Carbon secured DESNZ development consent on 25 August for the Beacon Fen Energy Park, a 400 MW solar plus co-located 600 MW BESS project near Sleaford, Lincolnshire, connecting to the Bicker Fen 400 kV substation. The project is the first major energy consent signed off by new Energy Secretary Miatta Fahnbulleh and one of the largest single co-located solar-plus-BESS approvals in the UK to date. Construction is targeted from 2027. The consent reinforces the UK direction that co-located solar-plus-BESS is now the default new-build UK Nationally Significant Infrastructure Project (NSIP) large-scale energy application, and that consenting at Fahnbulleh is running to timetable.

> **NES Sales Opportunity:** Beacon Fen is an early Fahnbulleh signal that Scottish and English utility-scale solar-plus-BESS consenting will progress at pace. NES firms in HV electrical, BESS enclosure fabrication, thermal management, fire protection, hazardous-area electrical, cyber-secure control systems, protective coatings, structural steel, civils and QHSE should approach Low Carbon (London), Bicker Fen substation NGET / SSEN Transmission connection engineering, and preferred solar+BESS EPC framework holders now for 2027 mobilisation. Beacon Fen is directly transferable to Field, Statera, Zenobe and Masdar UK BESS pipeline scope.

Citizens Advice publishes LDES cap-and-floor consultation response with consumer-risk flags (24 August 2026)

Citizens Advice published on 24 August its formal response to Ofgem's consultation on LDES cap-and-floor draft special licence conditions minded-to decisions. The response raises consumer-risk concerns on cap-and-floor governance, the graduated Back Stop Delay Factor, availability targets and cost overrun treatment. Ofgem's Window 1 minded-to portfolio (16 projects, 7,645 MW / 136.9 GWh, including Coire Glas, Loch Kemp, Earba pumped storage and 11 Li-ion BESS) remains on track for final autumn 2026 awards. The Citizens Advice intervention keeps consumer-cost scrutiny on the record ahead of final award design.

Ofgem LDES Window 1 autumn awards remain scheduled (August 2026)

Ofgem's Long Duration Electricity Storage Window 1 process remains on track for final cap-and-floor awards in autumn 2026. The Window 1 minded-to portfolio (16 projects, 7,645 MW / 136.9 GWh) includes SSE Renewables Coire Glas 1,440 MW, Statera Loch Kemp 660 MW and Gilkes Earba 1,800 MW pumped storage; 11 Li-ion battery projects; TeesCAES 50 MW compressed-air; and Frontier Legacy 65 MW vanadium/zinc flow. With both key Ofgem LDES consultations now closed, the sector shifts to award-day preparation for autumn.

9. Policy

Ofgem confirms 4% domestic energy price cap rise from 1 October — sharpest in three years (26 August 2026)

Ofgem announced on 26 August that the domestic energy price cap will rise by 4% from 1 October 2026, taking a typical annual dual-fuel bill to £1,723 — the sharpest single-quarter rise in three years. Wholesale gas is up 11% and typical gas bills are up 8%. The typical bill remains 52% below the January 2023 crisis peak. Prime Minister Andy Burnham confirmed on 27 August that his government's first energy policy will be to remove VAT from electricity bills. Scottish First Minister John Swinney called for urgent UK Government action and devolution of energy powers to Scotland. Energy Secretary Miatta Fahnbulleh restated the government's Clean Power 2030 mission as the durable route to lower and more stable UK bills. The cap change lands in the same week as the price of new NESO offshore-wind connections is being negotiated, and directly frames Autumn Budget positioning.

> **NES Sales Opportunity:** The 4% price cap rise is the clearest political signal this year that UK Clean Power 2030 delivery must accelerate on cost as well as build-out. For NES Tier 2/3 firms the direct read-across is that AR8, LDES, HAR2 and Track 1 CCS supply-chain LOIs must show measurable UK-content and cost-out. Priority: refresh cost narratives with SSE Renewables, ScottishPower, Iberdrola, Ossian JV, Ocean Winds, Eni CCUS Holding and Saipem procurement now, ahead of Autumn Budget on 28 October and any post-Budget procurement re-baselining.

England onshore-wind applications at 10-year high following July 2024 ban lift (23 August 2026)

The Guardian reported on 23 August, citing DESNZ Renewable Energy Planning Database data analysed by the Renewable Energy Foundation and RenewableUK, that England onshore-wind applications since the July 2024 ban lift are at a ten-year high. English applications now stand at 438 MW submitted in 2026, alongside Welsh applications of 490 MW and Scottish applications of 5,280 MW. The Renewables Consenting reforms in the Planning and Infrastructure Bill continue to be viewed by industry as the decisive lever for onshore-wind volume through 2028. The revival concentrates on Yorkshire, Cumbria, the Peak District fringe and East Anglia. RenewableUK has re-flagged NESO connection queue reform as the biggest remaining bottleneck.

> **NES Sales Opportunity:** The English onshore-wind revival is a direct signal for NES firms in mechanical fabrication, HV electrical, structural steel, coatings, crane services, marine warranty (for barge-served sites) and quayside civils. Approach RES, EDF Renewables, Vattenfall, ScottishPower Renewables, Community Windpower and Innogy on onshore project pipelines. AR8 Pot 1 onshore wind and Pot 3 offshore wind remain the primary CfD anchors.

DESNZ publishes Energy Trends and Prices statistical release (27 August 2026)

DESNZ published the monthly Energy Trends and Prices statistical release on 27 August, updating national energy production, consumption, prices and low-carbon electricity share data through Q2 2026. The release remains the primary UK Government macro data point for sector modelling, developer bid preparation and supply-chain investment casing. UK low-carbon electricity share remains above 50% of generation. The release feeds directly into AR8 Contract Budget Notice preparation (expected November) and Autumn Budget energy sensitivity analysis.

SSEN Transmission secures Section 37 consent for Cambushinnie 400 kV substation (August 2026)

SSEN Transmission has confirmed final Section 37 approval for the Cambushinnie 400 kV substation in Perth & Kinross — part of the Beauly-Denny 275 kV to 400 kV overhead line reinforcement. The scheme includes a £500,000 community benefit fund. The Cambushinnie project supports transmission capacity for Scottish onshore-wind, offshore-wind and pumped-storage export toward central Scotland and the border. Detailed design and construction sub-contracting continues, with material civils, HV electrical, protective coatings and structural-steel work packages moving into procurement through Q4 2026 and 2027.

> **NES Sales Opportunity:** Cambushinnie is the next Scottish-transmission NES supply-chain workbook to enter procurement. NES firms in HV electrical, substation civils, protective coatings, structural steel, hazardous-area electrical, rigging and marine-and-quayside logistics should approach SSEN Transmission (Perth), Balfour Beatty, Morgan Sindall, Siemens Energy UK and Hitachi Energy UK procurement now. Directly transferable to the wider Beauly-Denny upgrade and to Eastern Green Link 1 (SSEN Transmission / NGET) supply-chain workbook.

SSE plc reports record £24.9 million UK and Ireland community investment for FY26 (27 August 2026)

SSE plc announced on 27 August a record £24.9 million community investment for FY26 across 1,284 UK and Ireland projects, taking total community investment to £137 million. The funding covers SSE Renewables, SSEN Transmission, SSEN Distribution, SSE Thermal and SSE Airtricity portfolios. The announcement reinforces SSE's continued position as the largest UK renewables and transmission operator on both build-out and community investment. Beauly-Denny, Cambushinnie, Coire Glas, Dogger Bank, Seagreen and Berwick Bank all sit within the SSE portfolio.

Rosebank and Jackdaw ministerial decisions still with Fahnbulleh (August 2026)

The Rosebank OPRED consultation (closed 17 August) and Jackdaw consultation (closed 9 August) remain with Energy Secretary Miatta Fahnbulleh for ministerial decision, expected within weeks. Trade press this week continues to speculate that Prime Minister Andy Burnham could approve Jackdaw while blocking Rosebank if the decisions are made on a field-by-field basis. Rosebank and Jackdaw are operated by Adura (the 2026 Equinor and Shell UK merger vehicle) with Ithaca Energy as partner. Combined value is cited at up to £110.8 billion; OEUK cites gross value added of £28.7 billion, tax revenues of £1.4 billion before end-Parliament rising to £3.8 billion by 2034.

> **NES Sales Opportunity:** Rosebank and Jackdaw remain the single most consequential UKCS upstream ministerial decisions of 2026. NES firms must confirm post-consent mobilisation Letters of Intent this fortnight with Adura (Equinor-Aberdeen), Ithaca Energy and Shell UK frameworks across marine, subsea, wells (rigless P&A and intervention), ROV, coatings, cathodic protection and QHSE scope. Post-consent supply-chain scale-up will be measured in months not quarters.

10. Key Upcoming Events for NES Companies

Time-critical UK events, deadlines and windows for NES Tier 2/3 supply chain over the next 8 weeks:

Date	Event / Deadline	Location / Body	NES Action
Aug–Sept 2026 (expected)	DESNZ decision on Jackdaw and Rosebank consents (Fahnbulleh)	DESNZ / OPRED	Confirm post-consent mobilisation LOIs
10 Sep 2026	Botley West 840 MW solar decision deadline	DESNZ	Track co-located BESS + solar precedent
16 Sep 2026	NESO AR8 qualification assessment window closes	NESO	Support Tier 1 bid submissions
30 Sep 2026	GBE Supply Chain Fund R3 closes; NSTA Abandonment Fee Rules commence	GBE / NSTA	Submit R3 application if eligible
1 Oct 2026	Domestic energy price cap +4%; VAT off electricity (Burnham policy 1)	Ofgem / HMT	Commercial + procurement cost read-across
7–8 Oct 2026	RenewableUK Floating Offshore Wind Conference 2026	RenewableUK (Aberdeen)	Attend; confirm LOIs with floating developers
28 Oct 2026	Autumn Budget 2026	HM Treasury	Monitor energy tax measures

Date	Event / Deadline	Location / Body	NES Action
Autumn 2026	Ofgem LDES Window 1 final cap-and-floor awards	Ofgem	Confirm supply-chain LOIs with pumped storage + BESS developers
Autumn 2026	DESNZ HAR2 electrolytic hydrogen contract awards	DESNZ	Position with Veri/EnQuest, SP/Storegga, Ineos, Ramboll
Nov 2026 (expected)	DESNZ AR8 Contract Budget Notice	DESNZ	Track pot allocations
27 Nov 2026 – 17 Feb 2027	AR8 results announcement window	DESNZ / LCCC	Prepare post-award mobilisation
H1 2027	Crown Estate Round 6 for NE England 6 GW leasing (targeted)	The Crown Estate	Position with prospective Round 6 developers
H2 2026–28	Great British Energy Nuclear £4.6bn 14-contract pipeline	GBE-Nuclear / Rolls-Royce SMR	Register interest with GBE-Nuclear procurement
2027	Beacon Fen 400 MW solar + 600 MW BESS construction start	Low Carbon	Approach Low Carbon and Bicker Fen 400 kV team
2028	Track 1 CCS first CO2 injection at HyNet and NEP	Eni CCUS Holding / NEP	Track construction sub-contract windows

11. Grant Funding & Support Mechanisms Active This Week

Active UK grant, contract and support windows relevant to NES Tier 2/3 supply chain:

Mechanism	Body / Sponsor	Deadline / Status	NES Relevance
AR8 CfD Allocation Round	DESNZ / LCCC / NESO	Qualification 10 Aug – 16 Sep 2026; results 27 Nov – 17 Feb 2027	Support Tier 1 bids during NESO qualification
Clean Industry Bonus (AR8, all OW)	DESNZ	Payments on delivery	Demonstrate UK content evidence
DRIVE 35 Programme	DBIST / APC / Innovate UK	Cross Lanes £7.2m award live; further calls open through 2026	Position for geothermal drilling and DLE-adjacent work
LDES Cap-and-Floor Window 1	Ofgem	Both windows closed; final awards autumn 2026	Position for Coire Glas, Loch Kemp, Earba, Li-ion BESS
GBE Supply Chain Fund Round 3	Great British Energy	Closes 30 Sep 2026	Submit fabrication / manufacturing bids

Mechanism	Body / Sponsor	Deadline / Status	NES Relevance
GBE-Nuclear £4.6bn commercial pipeline	Great British Energy Nuclear	Contracts across 2026–28	Register interest with GBE-Nuclear procurement
HAR2 electrolytic hydrogen contracts	DESNZ	Awards later in 2026	Position with HAR2 developers (Sullom Voe, Cromarty, Grangemouth)
Track 1 / Track 2 CCS supply chain	DESNZ / Eni CCUS Holding / NEP	Track 1 mobilisation live; Track 2 Acorn Peterhead FID targeted 2026	Approach Saipem, Eni CCUS, Wood, Petrofac, Worley
NSTA Well Decommissioning Charter delivery	NSTA / 17 UKCS operators	Live from 13 Aug 2026; multi-year framework	Rig-to-vessel P&A capability positioning
CfD Pot 2 marine and tidal	DESNZ / LCCC	AR8 open for tidal stream ring-fenced budget	Approach Mocean Energy, CorPower, Orbital, EMEC
NSTA 2nd Offshore CO2 Storage Licensing Round	NSTA	Open through 2026	Position for CO2 storage well/pipeline services
SSE Community Investment Fund	SSE plc	£24.9m FY26 (record) live to 1,284 projects	Local partnership + supplier positioning near Beauly-Denny + Coire Glas

12. Sales Opportunity Summary for NES Supply Chain Companies

Prioritised opportunities from this week's activity. Star rating reflects immediacy and NES fit: ★★★★★ = time-critical this fortnight; ★★★★ = active this quarter; ★★★ = position for 2027; ★★ = watch.

Opportunity	NES Supply Chain Action	Contact / Body	Priority
Spirit Energy £40m North Sea decom campaign complete (25 Aug)	Approach Spirit Energy (Aberdeen), DeepOcean Aberdeen, Well-Safe Solutions (Aberdeen), Boskalis Subsea, Petrogas E&P and INEOS Energy Europe on rigless P&A, subsea cutting, dredging, ROV support, cathodic protection, high-integrity welding, coating removal and waste-stream engineering. Well-Safe Protector back in Aberdeen re-arms local rigless P&A stack.	Spirit Energy; DeepOcean; Well-Safe; Boskalis; INEOS	★★★★★
Field Rigifa 200 MW / 3,600 MWh 18-hr BESS consented (25 Aug)	Approach Field (London), preferred BESS EPC framework holders (Wartsila, Fluence, Tesla Megapack integrators) and DNO/NESO connection engineering partners now on BESS enclosure fabrication, HV electrical, thermal management, fire protection, hazardous-area electrical, cyber-secure control, coatings, civils and QHSE. Transferable to New Deer and Keith.	Field; SSE (Coire Glas); Statera; Gilkes	★★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
Masdar Rochdale 35 MW / 70 MWh BESS commissioned (24 Aug)	Approach Masdar UK / Arlington Energy (London), SMBC + ING project finance partners and BESS EPC framework holders on Rochdale O&M and near-term repeat scope. Transferable to Fidra, Zenobe, Statera, Frontier, Field, Harmony, NextEnergy and Econergy.	Masdar UK; Arlington Energy; SMBC; ING	★★★★★
Rosebank + Jackdaw consent decisions imminent	Confirm post-consent mobilisation Letters of Intent with Adura (Equinor-Aberdeen), Ithaca Energy and Shell UK frameworks across marine, subsea, wells (rigless P&A + intervention), ROV, coatings and QHSE scope for immediate mobilisation.	Adura (Equinor); Ithaca; Shell UK; DESNZ/OPRED	★★★★★
Ofgem LDES Window 1 both windows closed — autumn awards approach	Confirm supply-chain LOIs with SSE Renewables (Coire Glas), Statera (Loch Kemp), Gilkes (Earba) on HV electrical, mechanical fabrication, tunnelling, hydraulic, coatings and welding. 3,900 MW Scottish pumped storage anchor pipeline.	SSE; Statera; Gilkes; Zenobe; Frontier	★★★★★
Low Carbon Beacon Fen 400 MW solar + 600 MW BESS consent (25 Aug)	Approach Low Carbon (London), Bicker Fen 400 kV connection team (NGET / SSEN Transmission) and preferred solar+BESS EPC framework holders on HV electrical, BESS enclosure, thermal management, fire protection, structural steel, civils and coatings. First Fahnbulleh consent — direction-of-travel signal.	Low Carbon; NGET; SSEN Transmission	★★★★
SSEN Transmission Cambushinnie 400 kV substation approved	Approach SSEN Transmission (Perth), Balfour Beatty, Morgan Sindall, Siemens Energy UK and Hitachi Energy UK on HV electrical, substation civils, coatings, structural steel (BHC), hazardous-area electrical (Dron & Dickson) and rigging. Transferable to full Beauly-Denny upgrade and EGL1.	SSEN Transmission; Balfour Beatty; Siemens Energy; Hitachi	★★★★
TotalEnergies Walney I & II REGO PPA (27 Aug)	Approach Ørsted UK (Grimsby / London / Aberdeen), Offshore Partners Walney and TotalEnergies Gas & Power on HV subsea cable services, cathodic protection, turbine access, coating repair, marine warranty, ROV inspection and rope-access blade repair for outage windows through 2030.	Ørsted UK; OPW; TotalEnergies	★★★★
Ardersier Port Chinese OEM MoU (24 Aug)	Approach Haventus/Ardersier Port procurement and named international OEMs on coatings, structural steel (BHC), hazardous-area electrical (Dron & Dickson), rigging, marine coordination and mechanical fabrication for UK/European marshalling scope. Positioning window before firm contract award.	Haventus / Ardersier Port	★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
NSTA UKCS Decommissioning Charter — rig-to-vessel P&A (validated by Spirit)	Approach INEOS Energy Europe, Shell UK, Adura and Eni UK on rigless P&A, riserless well intervention, wireline, coiled tubing, well cementing, plug material innovation and integrated well engineering. Vessel-based P&A is now commercially proven — Spirit Energy is the reference.	INEOS Energy Europe; Shell UK; Adura; Eni UK; NSTA	★★★★★
Cadeler H1 2026 — foundation-vessel supply gap 2030-31	Approach Cadeler (London / Copenhagen), Menck (Ellerau), Van Oord, DEME Offshore and Seaway7 for Tier 2 foundation-installation sub-contract scope in monopile secondary steel, transition-piece access, hazardous-area electrical, coatings, cathodic protection, marine warranty and ROV inspection.	Cadeler; Menck; Van Oord; DEME; Seaway7	★★★★
UK floating (Gwynt Glas, Cenos, MarramWind, Salamander) — Aberdeen Floating Conference 7–8 Oct	Confirm attendance now. Pre-book meetings with EDF/ESB/Sumitomo (Gwynt Glas), Cenos, MarramWind, Salamander, Green Volt, Aker Solutions, Ossian JV. Finalise Squid, C-Dart and Krona pinless connector pitch materials.	EDF; ESB; Sumitomo; Aker Solutions	★★★★
Ofgem 4% domestic price cap rise + VAT-off-electricity (26-27 Aug)	Refresh cost-out narratives with SSE Renewables, ScottishPower, Iberdrola, Ossian JV, Ocean Winds, Eni CCUS Holding and Saipem procurement ahead of Autumn Budget 28 October and any post-Budget procurement re-baselining.	SSE; ScottishPower; Iberdrola; Ossian JV; Ocean Winds	★★★
Nobian / Air Products aviation hydrogen offtake (27 Aug)	Approach Air Products UK, ZeroAvia, Airbus and UK airport operators (Heathrow, Edinburgh, Aberdeen International) on airside hydrogen fuelling infrastructure. Also, Veri/EnQuest (Sullom Voe), Scottish Power/Storegga (Cromarty) and Ineos (Grangemouth) on HAR2 domestic sub-contracts.	Air Products UK; ZeroAvia; HAR2 developers	★★★
Cornish Lithium DRIVE 35 Cross Lanes geothermal (delivery)	Approach Cornish Lithium (Redruth), APC and Innovate UK on deep drilling, downhole tools, wireline, cementing, HV electrical, mechanical fabrication, welding, coatings, HSE and integrated well engineering. Aberdeen wells + DLE-adjacent process engineering directly transferable.	Cornish Lithium; APC; Innovate UK	★★★
Citizens Advice LDES cap-and-floor response (24 Aug)	Coordinate with Scottish Renewables, RUK, Offshore Wind Scotland and Storage UK on consumer-cost narrative to feed into Ofgem final award design. Watch policy signal on Back Stop Delay Factor + availability targets.	Ofgem; SR; RUK; OWS; Storage UK	★★
SSE plc £24.9m FY26 community investment (27 Aug)	Position local NES firm partnerships with SSE Renewables, SSEN Transmission and SSE Thermal community fund managers for supplier + community engagement in Beauly-Denny, Cambushinnie, Coire Glas and Berwick Bank corridors.	SSE plc	★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
UK marine and tidal (CfD Pot 2 tidal stream)	Keep on quarterly sales calendar. Mocean Energy Edinburgh, CorPower Ocean, Orbital Marine Power and EMEC Orkney priority engagement points. Floating platform, mooring, cabling, marine coordination.	Mocean Energy; CorPower; Orbital; EMEC	★★

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