

UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 17 October 2026

Coverage Period	Audience	Classification
11 – 17 Oct 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 17 October 2026 brought clarity on the CfD timetable, more pressure on floating wind and CCS budgets, and a series of North Sea policy signals.

DESNZ confirmed on 15 October that Allocation Round 8 (AR8) will run on the longest of its five possible timelines. NESO’s auction notice and the DESNZ pot budgets are due on 19 November, sealed bids are indicatively 3–9 December, and results are expected in mid-February 2027. There will be no Pending Applications process. The Scotsman reported on 11 October that industry and developers are holding “crisis talks” in Aberdeen to prioritise four floating projects totalling about 1.6 GW out of Scotland’s 24 GW pipeline. Flotation Energy announced redundancies while saying it remains committed to Green Volt (12 October).

On CCUS, Minister Martin McCluskey told the CCSA conference in Westminster (13 October) that five FIDs have been secured. He said more than £2 billion of contracts have gone to over 260 UK suppliers and the sector already supports about 5,500 UK jobs. He also warned that the “priorities, sequencing and pace” of the next phase may change because of fiscal constraints. Three days later Eni and DESNZ reached a financial agreement for the Liverpool Bay CCS network (16 October). Energy Secretary Miatta Fahnbulleh told Energy UK (14 October) that a Jackdaw decision is “imminent” and Rosebank will take longer; Prime Minister Andy Burnham said decisions would come “shortly”. Elsewhere:

- The European Commission gave Orbital Marine Power’s four-turbine EURO-TIDES array at EMEC, Orkney, its “Go Decision” to move into construction, with deployment targeted for 2028 (13 October).
- Ørsted agreed to buy its partners’ 49.9% of the 172 MW Gunfleet Sands 1 & 2 for about £15 million and is assessing a life extension (12–13 October).
- CIP bought 25% of the 1,080 MW Five Estuaries project (13 October), and INPP plans to invest £68 million in the Moray West OFTO, with financial close in December (15 October).
- Plaswire plans a wind-turbine recycling plant at the Inverness and Cromarty Firth Green Freeport, targeting 70 jobs (16 October).
- The University of Aberdeen and RGU launched the Aberdeen City Geothermal Working Group with NHS Grampian (reported 13 October).
- DOF Group won a \$15–25 million North Sea subsea decommissioning contract for a Q1 2027 campaign (13 October).
- SSEN Transmission asked Ofgem to advance the Earba pumped-storage connection and the Coire Mashie 400 kV substation (15 October).

1. Offshore Wind — Fixed Bottom

Ørsted takes full ownership of Gunfleet Sands 1 & 2 and weighs life extension (12–13 October 2026)

Ørsted agreed to buy its investment partners' 49.9% stake in the 172 MW Gunfleet Sands 1 & 2 offshore wind farms for about £15 million, using a buyback right in the original partnership agreements. Its ownership will rise from 50.1% to 100%. The project is about 7 km off the Essex coast and has generated power since 2010, supplying more than 125,000 UK homes a year. Closing is expected in November 2026. Ørsted says it is assessing how to maximise the project's remaining value, including a possible life extension, but has made no formal decision. It will assess similar portfolio opportunities case by case. Ørsted operates 12 UK offshore wind farms producing about 7% of UK electricity.

NES Sales Opportunity: This is one of the first clear signals that UK owners are buying out first-generation wind farms to extend their life rather than decommission them. Life extension creates work in structural integrity assessment, foundation and J-tube inspection, cable surveys, blade and drivetrain refurbishment, and control-system upgrades. NES asset-integrity, inspection and O&M firms should prepare a "life extension" service offer and approach Ørsted's UK O&M team before the November closing. The same decision will come up at other 2000s-era sites (Barrow, Kentish Flats, Burbo Bank, Lynn and Inner Dowsing), so offer the service across the fleet.

CIP buys 25% of Five Estuaries; INPP to invest £68m in Moray West OFTO (13–15 October 2026)

Copenhagen Infrastructure Partners (CIP) acquired a 25% stake in Five Estuaries (13 October), the consented 1,080 MW extension to Galloper about 40 km off East Anglia, which is designed to supply about one million British homes. It follows RWE's sale of its lead stake to EDF power solutions the previous week. International Public Partnerships (INPP) said on 15 October that it plans to invest £68 million in the Moray West Offshore Transmission Owner (OFTO) after Ofgem published proposed licence terms. Financial close is expected in December 2026, with a 23.5-year availability-based revenue linked to CPI. Moray West would be INPP's 12th OFTO. Also this week: OEG won an Ørsted contract to supply temporary power while Hornsea 3 converter stations are commissioned (12 October), Hampidjan Advant will supply lifting slings for the 960 MW East Anglia TWO, and record cable-duct operations were completed under the Suffolk coastline for the same project (15 October). Energy Voice reported that Dogger Bank, heading for commissioning next year, faces transmission-licensing and insurance issues (14 October).

NES Sales Opportunity: Five Estuaries now has a new shareholder group (EDF, CIP, Macquarie, ESB and Sumitomo), and early-stage scopes such as survey, geotechnical work, cable route engineering and marine coordination are likely to be reviewed. NES firms should introduce themselves to both EDF and CIP. The Moray West OFTO transfer brings a new long-term asset owner in the Moray Firth. Cable inspection, export-cable repair readiness, onshore substation maintenance and HV services will be procured under OFTO arrangements, so contact INPP's operator and Ocean Winds' transition team before December close.

Plaswire targets 70 jobs with turbine recycling at Inverness & Cromarty Firth Green Freeport (16 October 2026)

Northern Irish recycling company Plaswire plans to set up a wind-turbine recycling operation at the Inverness and Cromarty Firth Green Freeport, aiming to create 70 jobs. Separately, a Scottish Renewables report (12 October) called for action on grid access, consenting and electricity costs to unlock Scotland's port potential. At the Global Offshore Wind Awards in London (13 October), the Circular Economy for the Wind Sector (CEWS) collaboration led by ORE Catapult won the "Power in collaboration" award.

NES Sales Opportunity: Blade and composite recycling is becoming a Highland industry. NES firms in blade removal, cutting and handling, transport, waste logistics, quayside services and decommissioning

engineering should contact Plaswire and the Green Freeport team now about subcontract and partnering roles. Combining repowering, life extension and recycling services in one offer will help with operators facing end-of-life decisions on early UK wind farms.

Scottish grid charges set to double as Eastern Green Link costs pass through (12 October 2026)

Energy Voice reported on 12 October that transmission charges for Scottish wind farms are set to double as costs of the Eastern Green Link (EGL) HVDC projects feed into tariffs, while some generators in southern England (such as the Cotswolds) receive grid credits. Scottish Energy Minister Stephen Gethins has called for transmission-charge (TNUoS) reform. Energy Voice commentary notes that full reform is not expected until 2029.

NES Sales Opportunity: Higher TNUoS charges cut Scottish project margins and could make some ScotWind projects less competitive in AR8 against English sites. Expect developers to push harder on supply-chain cost cuts. NES suppliers should be ready to show lifecycle cost savings (lower vessel days, faster installation, predictive maintenance) and should support the Scottish Renewables and ETZ submissions on transmission charging.

2. Floating Offshore Wind

Aberdeen “crisis talks” to prioritise four floating projects (~1.6 GW) (reported 11 October 2026)

The Scotsman reported that industry and developers are meeting in Aberdeen to agree on a shortlist of four floating projects totalling about 1.6 GW to prioritise, out of a Scottish pipeline of about 24 GW that could be worth £50 billion if built. Of 30 potential projects, only three have planning consent. Candidates include Buchan (960 MW), Caledonia (2 GW, of which about 500 MW floating), Pentland (100 MW, GB Energy-backed), Salamander (100 MW, INTOG) and Green Volt (560 MW, consented). Shell returned its 2 GW CampionWinds lease last November and Ocean Winds relinquished the 500 MW Arven South earlier this year. BloombergNEF expects floating wind to stay niche against fixed-bottom through 2041. Stephen Gethins called for transmission-charge reform and for the UK Strategic Spatial Energy Plan (SSEP) to reflect Scotland's pipeline. Industry leaders want a realistic prioritisation and decisions within 12 months.

NES Sales Opportunity: A shortlist of about four projects (likely Pentland, Green Volt, Salamander and a first phase of Buchan or Caledonia) is where floating-wind orders will come from to 2030. Focus business development on those developers rather than the whole ScotWind list. Mooring and anchor suppliers, marine operations, survey, port services and O&M firms should map the procurement timelines for each shortlisted project and decide where to commit capex only once a project's CfD and FID path is clear. Salamander plans to bid in AR8, so the December bid window matters.

Flotation Energy redundancies; Green Volt remains in play (12 October 2026)

Flotation Energy, developer of the 560 MW Green Volt floating project (AR6 CfD) with Vårgrønn, announced redundancies on 12 October while saying it remains committed to Green Volt. Vårgrønn told The Scotsman it has not confirmed any withdrawal and is progressing towards key decisions. Energy Voice commentary (9 October, just before this window) said Port of Aberdeen is seeking investment for further South Harbour dredging and a £25 million major-component replacement facility, and that Salamander will seek a CfD in AR8. At the Global Offshore Wind Awards (13 October), Pentland Floating Offshore Wind Farm (Copenhagen Offshore Partners) won the “Closing the deal” award jointly with East Anglia THREE.

NES Sales Opportunity: Developer staff cuts typically slow procurement decisions and can move work to EPC contractors. Keep Green Volt relationships active but do not commit capex to its schedule until

ownership and FID are confirmed. Pentland's award reinforces it as the most bankable near-term floating project. Port of Aberdeen's £25 million major-component replacement facility, together with GB Energy's major-component replacement (MCR) hub engagement, is a consortium opportunity for Aberdeen heavy-lift, crane, marine engineering and port-services firms.

3. Hydrogen

ITM Power's Hydropulse agrees terms for 150 MW refinery project; results due 19 October (12 October 2026)

Sheffield-based ITM Power said its build-own-operate subsidiary Hydropulse signed preliminary terms with an unnamed European oil refinery for a proposed 150 MW green hydrogen project, potentially ITM's largest commercial commitment. It would use ITM's Alpha electrolyser platform under a 10-year agreement, with a FEED study now under way, FID targeted for 2027 and production from 2029. ITM shares rose 7% to 100.5p. The project site is outside the UK, but ITM designs and manufactures its electrolyzers in the UK. ITM publishes preliminary results for the year to 30 April 2026 on 19 October, with an analyst presentation at 9:00am.

NES Sales Opportunity: UK electrolyser manufacturers are finding work abroad while UK HAR2 decisions are pending. NES firms supplying balance-of-plant (compression, water treatment, power electronics, pipework, skids, safety systems) should ask ITM about its Hydropulse model and supplier needs. Listen to the 19 October results for any UK project names and for order-book timing.

UK Energy and UK Nuclear sign MoU on nuclear-powered hydrogen, ammonia and geological storage (14 October 2026)

London-based UK Energy Group's subsidiary UK Energy Storage signed a five-year memorandum of understanding with UK Nuclear Ltd to assess producing hydrogen and then ammonia with power, heat and steam from advanced and small modular reactors. The hydrogen and ammonia would be stored in UK Energy's planned underground geological storage, and the parties would apply jointly for UK government and research support. The companies link the work to the emerging UK roadmap for low-carbon ammonia.

NES Sales Opportunity: This is an early-stage MoU rather than a funded project. It does show that underground hydrogen storage is attracting new partners. NES subsurface, well engineering, drilling and integrity specialists, who already know salt-cavern and reservoir work from oil and gas, should track UK Energy's storage sites and the low-carbon ammonia roadmap. Hydrogen remains a 2027-plus market until HAR2 and the UK Hydrogen Strategy are published.

4. CCUS

McCluskey at CCSA: 5 FIDs, £2bn to 260+ UK suppliers, but "priorities, sequencing and pace" may change (13–14 October 2026)

Speaking at the CCSA annual conference at Central Hall Westminster on 13 October (speech published 14 October), Minister for Local Energy and Jobs Martin McCluskey said the government has secured five FIDs. On the East Coast Cluster, Northern Endurance Partnership and Net Zero Teesside Power support about 3,000 construction jobs. Projects have awarded more than £2 billion of contracts to over 260 UK suppliers, and 175 local young people are in training. In HyNet, Liverpool Bay CCS supports more than 1,400 jobs, while Padeswood cement and Protos energy-from-waste together support over 600 jobs. Two Teesside competitions are running in 2026, and the government is funding Humber CCUS infrastructure under Viking and supporting Acorn in Scotland. However, McCluskey warned that the next phase faces a challenging fiscal environment and that

“priorities, sequencing and pace” may change. DESNZ’s industrial CCS lead Stefanie Murphy said future transport and storage projects may not be funded at past levels. Energy Voice reported that cutting the energy budget by £2 billion would hamper CCS (12 October). Progressive Energy launched a business to transport non-pipeline CO₂ to the East Coast Cluster (12 October), and NZT Power’s gas turbine arrived on Teesside as construction accelerates (14 October).

NES Sales Opportunity: Track 1 work (East Coast Cluster and HyNet) is funded and spending money now. NES firms should prioritise these supplier lists. Acorn and Viking (Track 2) face real risk of slower funding, so the Autumn Budget on 28 October is the key signal before committing resources to them. Non-pipeline CO₂ transport (shipping, rail and road) is a new route for NES port, shipping and logistics companies. Contact Progressive Energy’s new venture early.

Eni and DESNZ reach financial agreement for Liverpool Bay CCS (16 October 2026)

Eni and the Department for Energy Security and Net Zero reached a financial agreement for the Liverpool Bay CCS project, the transport and storage backbone of the HyNet cluster serving North West England and North Wales. The agreement allows construction of the main network to begin, with start-up planned for 2028. Eni will repurpose offshore platforms and 149 km of onshore and offshore pipelines, and build 35 km of new pipelines. Initial storage is 4.5 Mtpa, rising to 10 Mtpa in the 2030s. About 2,000 construction jobs are expected. The Douglas CCS platform was installed the previous week.

NES Sales Opportunity: With funding agreed, Liverpool Bay moves from enabling works into full construction. Pipeline conversion, cleaning and pigging, integrity assessment, platform modification, hook-up, commissioning and monitoring are core NES skills. Contact Eni UK and its EPCI contractors now for 2027 work packages, and present repurposing experience from North Sea oil and gas projects.

5. Marine & Tidal

European Commission gives “Go Decision” to Orbital’s EURO-TIDES array at EMEC, Orkney (13 October 2026)

The European Commission issued its “Go Decision” for EURO-TIDES, Orbital Marine Power’s tidal array at EMEC in Orkney, after a formal review of engineering, permits and financing. The array will comprise three next-generation O2-X turbines and one O2, operated together as Orbital’s first connected farm. It could supply about 9,200 homes, around 85% of Orkney households; each O2-X can supply about 2,400 homes. Deployment is expected in 2028, subject to Orbital completing its current investment round. The project is funded by Horizon Europe; partners include EMEC, RWTH Aachen’s CWD, ENGIE Laborelec, MaraSoft, Ocean Energy Europe and the University of Edinburgh. Alistair Carmichael MP said the APPG on Marine Energy was being reconstituted that week.

NES Sales Opportunity: EURO-TIDES is the first multi-turbine tidal array with a construction green light in Scotland since MeyGen. It will need fabrication of floating hulls and turbine structures, moorings and anchors, subsea cables, marine operations and port services, with 2027 procurement for 2028 deployment. Orkney, Caithness and NES firms with fabrication, marine and subsea capability should contact Orbital now about its supply chain, and follow its investment round, which is the main condition for the 2028 date. AR8’s tidal ring-fence (sealed bids 3–9 December) is the next commercial trigger.

6. Geothermal

Aberdeen City Geothermal Working Group launched; REA geothermal conference in London (13 October 2026)

The University of Aberdeen reported on 13 October that the inaugural Aberdeen City Geothermal Working Group met on 2 October. It is co-hosted with Robert Gordon University (RGU) and supported by NHS Grampian, NHS Assure, Geothermal UK and the National Geothermal Centre, with regional businesses attending. NHS Grampian hopes deep geothermal could meet heat demand at the Foresterhill Health Campus. Five work areas are planned: the size of the prize, subsurface evidence, heat networks and estates, delivery and regulation, and skills, supply chain and market-building. TownRock Energy completed a Scottish Government-funded deep-geothermal desk study last year. The next meeting is at RGU in the new year, and new participants are welcome. In London on 13 October, the REA's UK geothermal conference heard a keynote from Climate Transition Minister Katie White, and Andrew Bowie MP spoke on moving oil and gas workers into geothermal.

NES Sales Opportunity: Aberdeen geothermal brings together the city's strongest assets: subsurface expertise, drilling, well engineering and a large public-sector heat customer at Foresterhill. NES drilling contractors, well-engineering consultancies, completions specialists and heat-network firms should join the working group (participants are being invited) and position for a Foresterhill feasibility or demonstrator well. The supply-chain workstream is the right entry point.

7. Decommissioning

DOF wins \$15–25m North Sea subsea decommissioning contract for Q1 2027 (13 October 2026)

DOF Group won a "significant" contract, which it defines as \$15–25 million, for subsea decommissioning for an unnamed North Sea operator. The scope covers project management, engineering, offshore execution and disposal for removing subsea infrastructure and clearing the seabed across multiple fields. DOF will use one of its construction support vessels (CSVs), with the offshore campaign expected in Q1 2027. DOF has a large Aberdeen base.

NES Sales Opportunity: Multi-field subsea removal campaigns need ROV tooling, cutting, lifting, survey, debris clearance, onshore waste handling and recycling. DOF's Aberdeen team is likely to subcontract several of these scopes over the winter for a Q1 2027 mobilisation, so NES specialists should contact DOF procurement now.

Rough gas storage closure by March; NSTA emissions data; Ninian Central consultation closes (13–16 October 2026)

Energy Voice reported (16 October) that Centrica says it will close the Rough gas storage facility, the UK's largest, by March, and that a union has called for a public takeover. The NSTA reported that North Sea emissions continue to fall, citing work by Neo Next+ and Serica (13 October). Consultation on CNR International's draft decommissioning programme for the Ninian Central topsides closed on 16 October. Separately, The Telegraph reported last week that Rough is scheduled for decommissioning from next April.

NES Sales Opportunity: If Rough closes, it will be one of the largest Southern North Sea decommissioning programmes, covering platforms, wells and pipelines, although a government rescue is still possible. NES well plug-and-abandonment, topsides removal and onshore dismantling specialists should keep in contact with Centrica. With the Ninian Central consultation closed, CNR's procurement for engineering-down-and-clean and topsides preparation is the next step.

8. Hydropower & Pumped Storage

SSEN Transmission asks Ofgem to advance Earba pumped-storage connection and Coire Mashie 400 kV substation (15 October 2026)

SSEN Transmission submitted proposals to Ofgem to advance three transmission projects in Perthshire and the Highlands through the Load Re-opener process. They are the Earba pumped-storage hydro connection in the Central Highlands west of Dalwhinnie, the Coire Mashie 400 kV substation between Laggan and Dalwhinnie, and the Coupar Angus 2 132 kV substation in Perth and Kinross. SSEN is seeking funding for early design, environmental assessment, land, planning and stakeholder engagement. Earba is Gilkes Energy's 1,800 MW / 40 GWh pumped-storage scheme, consented by the Scottish Government in March 2025. Glen Earrach (2 GW, near Loch Ness), which Highland Council did not object to on 7 October, now awaits a decision by Scottish Ministers.

NES Sales Opportunity: A grid connection being funded is a strong sign that Earba is moving towards construction. Expect early contracts for ground investigation, surveying, environmental studies and access-road design, followed by substation civils, HV equipment, tunnelling and M&E. NES civils, HV and engineering firms should contact SSEN Transmission's Central Highlands project team and Gilkes Energy now. Ofgem's long-duration storage (LDES) cap-and-floor decisions will decide which of Earba, Glen Earrach, Coire Glas and Loch Kemp proceed first.

9. Policy

Jackdaw decision "imminent", Rosebank later; Adura report, unions and OEUK tax push (11–16 October 2026)

Energy Secretary Miatta Fahnbulleh told the Energy UK conference (14 October) that her department has all the information on Jackdaw and a decision is "imminent", while Rosebank will take longer. Prime Minister Andy Burnham said decisions would come "shortly" and that the government is "not backing away" from them (14–16 October). Energy Voice reported on 13 October that expectations of an approval during Burnham's Scotland visit were cooled. A Public First report for Adura (13 October) estimated that not approving Rosebank and other planned fields would cost £10.8 billion of GVA and 3,330 jobs a year to 2035, with £4.1 billion of tax from Rosebank and Jackdaw over the decade. Ten trade unions, including Unison and the NEU, urged rejection of Rosebank (15 October), while an SNP-commissioned poll found majority public support (15 October). OEUK called for the Energy Profits Levy to be scrapped next January and replaced with a price-triggered Oil and Gas Revenue Levy, which it says could unlock 111 projects and £50 billion of investment (11 October). In her speech Fahnbulleh said £100 billion of private clean-power investment had been unlocked in two years and that GB Energy will support more than 1,000 community and local energy projects by 2030.

NES Sales Opportunity: A Jackdaw approval could come within days. The near-term work is hook-up, commissioning and start-up support on a 99%-built project, with gas potentially this winter. Rosebank would be a much larger FPSO, subsea and drilling programme but is now later. The Autumn Budget on 28 October will decide the EPL question. NES firms should prepare for a Jackdaw mobilisation and keep Rosebank bids current, while recognising that Adura's investment plans depend on both decisions.

AR8 on longest timeline; Budget to target green levies; bills support; strikes continue (14–16 October 2026)

DESNZ confirmed AR8 will follow the standard (longest) timetable, with no Pending Applications process, citing competition, consumer value and time for bidders to prepare. NESO's Notice of Auction and DESNZ's pot budgets follow on 19 November, sealed bids are indicatively 3–9 December, and results are due in mid-February 2027. Energy Voice reported that the Autumn Budget is expected to target green levies to cut bills and that the Boiler Upgrade Scheme could be cut (14 October). Ofgem is preparing a market stabilisation charge for "extreme" price volatility as the £150 Warm Home Discount is paid (16 October). The government also launched an

investigation into the Tees Valley Combined Authority, which oversees Teesworks (16 October). Further Wood Group strikes on Harbour Energy installations are scheduled for 20–21 October and 3–4 November.

NES Sales Opportunity: The AR8 timetable means firm offshore-wind and tidal orders tied to AR8 move into 2027, after results in mid-February. Use the period before the 19 November budget notice to agree supplier terms with bidding developers, because bid prices will depend on supply-chain costs. Budget decisions on green levies and CCUS funding (28 October) are the main risk to watch. Build strike buffers into October–November offshore campaigns on Harbour Energy assets.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
19 Oct 2026	ITM Power preliminary results and analyst presentation (9:00am)	London (AIM)	Electrolyser order book
20–21 Oct 2026	Wood Group strike, second 48-hour walkout (Harbour Energy assets)	Central North Sea	Campaign scheduling risk
22–23 Oct 2026	Rolls-Royce SMR / GBE-N supplier conference (Wylfa)	Ynys Môn, Wales	SMR supply chain
25 Oct 2026	UK clocks go back (GMT)	National	Offshore shift and logistics planning
28 Oct 2026	Autumn Budget 2026	Westminster	EPL, green levies, CCUS Track 2
31 Oct 2026	NESO Gate 2 Phase 1 connection-offer deadline (extended)	National	Firm grid dates for projects
3–4 Nov 2026	Wood Group strike, third 48-hour walkout	Central North Sea	Campaign scheduling risk
4–5 Nov 2026	Global Offshore Wind Investment Forum	London	Developer and investor access
Nov 2026	Ørsted completes Gunfleet Sands 1 & 2 buyout	Off Essex	Life extension scopes
19 Nov 2026	AR8 Notice of Auction (NESO) and pot budgets (DESNZ)	National	Floating, ODOV and tidal budgets
3–9 Dec 2026	AR8 sealed-bid window (indicative)	National	Supplier pricing locked in
10 Dec 2026	GB Energy Supply Chain Fund: final application close	National	Manufacturing capex grants
Dec 2026	Moray West OFTO financial close (INPP)	Moray Firth	OFTO O&M and HV services
Mid-Feb 2027	AR8 results	National	Offshore wind and tidal order triggers
Q1 2027	DOF subsea decommissioning campaign	North Sea	ROV, cutting, waste handling
2028	EURO-TIDES deployment at EMEC (subject to funding)	Orkney	Tidal fabrication and marine ops

11. Grant Funding & Support Mechanisms Active This Week

Mechanism	Amount / Scope	Deadline	Relevance to NES
GB Energy Supply Chain Fund: Offshore Wind and Networks	£300m capex grants; 29 eligible components	Closes 10 Dec 2026 (or earlier)	Jackets, cables, HV kit, components
GB Energy MCR hub market engagement	Expressions of interest: delivery, operation, finance	Open now	Ports, heavy lift, floating O&M
CfD AR8 (DESNZ / NESO)	Pot budgets published 19 Nov; incl. floating, ODOW, tidal	Bids 3–9 Dec 2026	Revenue support underpinning orders
Horizon Europe (EURO-TIDES)	EU funding for Orbital tidal array	Go Decision granted 13 Oct	Tidal fabrication, moorings, cables
CCUS Track 1 (HyNet, East Coast Cluster)	Liverpool Bay financial agreement 16 Oct; £2bn+ to UK suppliers	Live	Repurposing, integrity, construction
CCUS Track 2 (Acorn, Viking)	Development funding; pace under review	Budget 28 Oct signal	St Fergus and Humber scopes
Scottish Government Offshore Wind Investment Programme	£500m via SE, HIE, SNIB	Rolling to 2028/29	Ports and manufacturing
Inverness & Cromarty Firth Green Freeport	Tax and customs incentives (e.g. Plaswire)	Rolling	Recycling and manufacturing sites
Ofgem Load Re-opener (SSEN Transmission)	Funding for Earba and Coire Mashie development	Ofgem review	Highland grid and hydro works
Ofgem LDES cap-and-floor Window 1	Pumped storage and long-duration projects	Decisions pending	Earba, Glen Earrach, Coire Glas
HAR2 electrolytic hydrogen (DESNZ)	Shortlist awaiting decision	Pending	Electrolyser balance-of-plant

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
Liverpool Bay CCS (Eni, HyNet)	Financial agreement signed 16 Oct; construction of main network, start-up 2028. Pipeline conversion, integrity, hook-up, commissioning.	★★★★★	Now – 2027
AR8 bidder supply terms	Budgets 19 Nov, bids 3–9 Dec, results mid-Feb 2027. Agree pricing and capacity with bidding developers.	★★★★★	Before 3 Dec

Opportunity	Details	Rating	Action Window
Shortlisted floating projects (~1.6 GW)	Pentland, Green Volt, Salamander and a Buchan or Caledonia phase. Moorings, survey, marine ops, ports.	★★★★★	Now to 2027
EURO-TIDES tidal array (Orbital, EMEC)	Go Decision 13 Oct; 3 O2-X + 1 O2; deployment 2028. Fabrication, moorings, cables, marine ops.	★★★★★	2027 procurement
Gunfleet Sands life extension (Ørsted)	172 MW, operating since 2010; full ownership from Nov. Integrity, inspection, refurbishment.	★★★★★	From Nov 2026
DOF subsea decommissioning campaign	\$15–25m, multiple fields, CSV campaign Q1 2027. ROV tooling, cutting, survey, waste.	★★★★★	Winter 2026/27
Earba pumped storage + SSEN grid	1.8 GW / 40 GWh consented; SSEN seeking Ofgem development funding. GI, civils, HV, tunnelling.	★★★★★	Early engagement
Five Estuaries (EDF, CIP)	1,080 MW consented; new shareholders reviewing route to construction. Survey, cable route, marine.	★★★★★	Introduce now
Moray West OFTO (INPP)	£68m, financial close Dec 2026; 23.5-yr regime. Cable inspection, substation O&M, HV services.	★★★	Before Dec close
Plaswire turbine recycling (Green Freeport)	70 jobs targeted at Inverness & Cromarty Firth. Blade handling, logistics, cutting, waste.	★★★	Partner now
Aberdeen geothermal (Foresterhill)	Working group with NHS Grampian; five workstreams incl. supply chain. Drilling, wells, heat networks.	★★★	Join group
Jackdaw (Adura)	Decision “imminent”; 99% built. Hook-up, commissioning, start-up support.	★★★	Days to weeks
Non-pipeline CO2 transport	Progressive Energy venture for East Coast Cluster. Shipping, rail, port handling, logistics.	★★★	2027
Rough decommissioning (Centrica)	Closure planned by March; takeover calls. Well P&A, topsides, pipelines.	★★	Track decision
Hydrogen BOP (ITM / Hydropulse)	150 MW refinery project terms; FID 2027. Compression, water treatment, skids.	★★	After 19 Oct results

Sources Used

- [1] [Yahoo Finance / Oilprice — Ørsted takes full control of UK offshore wind farm \(13 Oct 2026\)](#)
- [2] [EnergyWatch — CIP buys into major UK offshore wind farm \(13 Oct 2026\)](#)
- [3] [Yahoo Finance — International Public Partnerships plans £68m Moray West OFTO investment \(15 Oct 2026\)](#)
- [4] [TGS 4C — Offshore wind news \(Gunfleet Sands, Five Estuaries, East Anglia TWO, OEG Hornsea 3, Scottish Renewables ports, AR8; 12–16 Oct 2026\)](#)
- [5] [Energy Voice — Wind news \(Plaswire, AR8, Dogger Bank, grid charges, OEG, Flotation Energy; 12–16 Oct 2026\)](#)
- [6] [WN / Energy Voice — Inverness turbine recycling aims to create 70 jobs \(16 Oct 2026\)](#)

- [7] [WN / Energy Voice — Grid charges to double for Scottish wind farms as EGL costs bite \(12 Oct 2026\)](#)
- [8] [RenewableUK — Winners announced for the Global Offshore Wind Awards 2026 \(14 Oct 2026\)](#)
- [9] [The Scotsman — North Sea floating wind crisis talks \(11 Oct 2026\)](#)
- [10] [Energy Voice — Floating offshore wind, a postmortem \(9 Oct 2026, context\)](#)
- [11] [Yahoo Finance — ITM Power shares jump 7% on 150 MW green hydrogen project \(12 Oct 2026\)](#)
- [12] [FT Markets / RNS — ITM Power trading update and notice of preliminary results on 19 Oct 2026](#)
- [13] [AJ Bell — UK Energy signs accord on nuclear and hydrogen production and storage \(14 Oct 2026\)](#)
- [14] [GOV.UK — Carbon capture and the renewal of British industry, speech by Martin McCluskey \(14 Oct 2026\)](#)
- [15] [Bloomberg — UK warns carbon capture industry that subsidy cuts are coming \(14 Oct 2026\)](#)
- [16] [Climate Home News — Carbon capture industry faces tough future as UK raids green spending \(14 Oct 2026\)](#)
- [17] [AK&M — Eni and the UK government reach financial agreement on Liverpool Bay CCS \(16 Oct 2026\)](#)
- [18] [Energy Voice — Energy transition news \(CCS budget, Progressive Energy, NZT Power, Rough, Budget, Ofgem; 12–16 Oct 2026\)](#)
- [19] [Offshore Energy — Tidal energy array in Scotland cleared for construction start \(13 Oct 2026\)](#)
- [20] [The Orcadian — Approval secured for landmark tidal energy array \(13 Oct 2026\)](#)
- [21] [University of Aberdeen — Aberdeen City Geothermal Working Group \(13 Oct 2026\)](#)
- [22] [Impakter — Who will buy UK geothermal? REA conference preview \(12 Oct 2026\)](#)
- [23] [Offshore Energy — North Sea operator appoints DOF for subsea decommissioning \(13 Oct 2026\)](#)
- [24] [Energy Voice — Oil and gas news \(Rough, NSTA emissions, Rosebank/Jackdaw, polls; 13–16 Oct 2026\)](#)
- [25] [CNR International — Ninian hub decommissioning programme](#)
- [26] [Scottish Construction Now — SSEN Transmission submits proposals to Ofgem for advancing clean power projects \(15 Oct 2026\)](#)
- [27] [BBC News — Rosebank and Jackdaw decisions coming shortly, says PM \(14 Oct 2026\)](#)
- [28] [Energy Live News — Energy Secretary says Jackdaw gas field decision is imminent \(16 Oct 2026\)](#)
- [29] [ITV News — “We’re not backing away” from Jackdaw and Rosebank decisions, says Andy Burnham \(16 Oct 2026\)](#)
- [30] [GOV.UK — Building an energy system that delivers for all, speech by Miatta Fahnbulleh \(14 Oct 2026\)](#)
- [31] [Yahoo News — Rejecting Rosebank and Jackdaw could cost UK £10.8bn \(13 Oct 2026\)](#)
- [32] [The Independent — Trade unions urge Burnham to reject Rosebank \(15 Oct 2026\)](#)
- [33] [Yahoo Finance / Oilprice — North Sea oil producers push to scrap windfall tax \(11 Oct 2026\)](#)
- [34] [reNEWS — AR8 to run to longest timeline \(15 Oct 2026\)](#)
- [35] [LexisNexis — DESNZ confirms standard auction timetable for CfD Allocation Round 8 \(15 Oct 2026\)](#)