INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 11 July 2026

Prepared by ExportCentral AI

Coverage Period	**Audience**	**Classification**
5 – 11 July 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

AR8 statutory notices land — 20 offshore wind projects and floating wind visibility. DESNZ published the AR8 statutory notices on 6 July, formally opening the eighth Contracts for Difference allocation round. Twenty offshore wind projects are eligible to bid, up from eight AR7 awards. The round introduces a five-pot structure with separate clearing prices for offshore wind based on connection location, freezes administrative strike prices at AR7 levels and — for the first time — makes floating offshore wind bids visible in the results. Industry estimates suggest around 12 GW of solar capacity is eligible (vs 5 GW at AR7). The application window opens 24 July, with the initial Clean Industry Bonus budget set at £200 million. Fixed-bottom, floating, tidal, hydrogen and CIB-supplemented offshore wind pots all sit inside the round.

Ofgem accelerates frequency response and network reform. Ofgem approved changes to the UK frequency response markets on 7 July — Tranche 1 effective 31 July 2026, Tranche 2 effective 1 January 2027. Dynamic Response services will be tied to Final Physical Notification in the balancing market, NESO gains explicit power to publish penalty data for individual providers, and providers must maintain 80% operational metering over a rolling 28-day window. Separately, DESNZ opened its consultation on the Draft Strategic Policy Guidance for Electricity Networks Growth on 8 July (deadline 19 August), directing Ofgem to consider procurement approaches that strengthen domestic manufacturing, energy security and supply-chain resilience. These reforms tighten the operational and commercial rules on which NES BESS, control-systems and grid-services firms trade.

Decommissioning contract flow intensifies. Well-Safe Solutions was appointed lead contractor for Apache North Sea's Beryl Field decommissioning on 7 July, expanding the combined Well-Safe scope across Beryl and Forties to more than 260 wells across seven platforms. Archer Limited announced a major integrated framework with Well-Safe on 8 July covering platform drilling, wireline, coiled tubing, downhole and specialist subsea services under the same Apache programme. Offshore well operations begin on Beryl Bravo platform this summer, with subsea decommissioning from 2027. In parallel, the NSTA Annual Report was laid in Parliament on 7 July highlighting the North Sea Future Plan legislative package and enhanced NSTA powers on binding dispute resolution, decommissioning and financial penalties. Aberdeen-based P&A, integrity, subsea and waste-management firms have an immediate multi-year runway.

Hydrogen signals brighten — but a Teesside setback. Siemens on 7 July identified five signals of UK hydrogen moving from promise to pipeline: £500m confirmed for infrastructure in the Spending Review, the first regional hydrogen transport-and-storage network in development, 10 HAR1 projects cleared to begin construction, a refreshed UK Hydrogen Strategy expected this autumn, and grid-balancing recognition through the SSE–Siemens Mission H2 Power collaboration at Keadby 2. UK Oil & Gas confirmed on 5 July its full strategic pivot to geological hydrogen storage — 24 salt caverns at c.4,363 ft depth in South Dorset and a matching East Yorkshire concept feasibility study, aligned to HT&SBM allocation rounds starting 2026. Against this, BP dropped its Teesside hydrogen project on 6 July in favour of an AI data centre at the same site.

Storage and CCUS momentum builds. Field reached financial close on 7 July on two BESS projects: the 39 MW / 200 MWh Keith site (managing Scotland's B4 boundary constraint) and the 200 MW / 800 MWh Hartmoor site in Northeast England (supporting Dogger Bank integration and Hartlepool nuclear decommissioning). Total portfolio in construction is 490 MW / 1.5 GWh with lending from ING, Rabobank and ABN AMRO. On CCUS, Belgium and the UK signed an MoU under the London Protocol enabling cross-border CO2 storage (reported early July), and Fugro was awarded the survey contract for the UK's first commercial CCS project on 10 July, covering nearshore and offshore pipeline route surveys for the Northern Endurance Partnership East Coast Cluster. Details on 24 July commencement of PIA 2025 direct-in and direct-out powers give the Secretary of State new intervention tools for nationally significant energy projects.

1. Offshore Wind — Fixed Bottom

AR8 statutory notices published 6 July — 20 OW projects eligible, five-pot structure, ASPs frozen at AR7

DESNZ published the full suite of AR8 statutory notices on 6 July 2026, formally launching the eighth CfD allocation round. Twenty offshore wind projects are eligible to bid, up from eight AR7 awards. The round introduces a five-pot structure with separate clearing prices for offshore wind based on connection location. Administrative strike prices are frozen at AR7 levels. The Initial Clean Industry Bonus budget is £200 million. Delivery years are 2028/29 and 2029/30. Application window opens 24 July 2026. Additional CIB updates simplify the application process, clarify budgetary powers and add fair-work conditions on offshore wind developers before subsidy is made available. The Telegraph noted AR7 delivered CfDs to eight offshore wind farms worth an estimated £1.8bn in annual subsidies; AR8 is expected to be as big or bigger.

> **NES Sales Opportunity:** Twenty eligible fixed-bottom projects heading into the 24 July application window creates the largest concentrated supply-chain positioning wave of 2026. NES fabrication, monopile, jacket, cable-protection, subsea inspection and OFTO transfer firms should be in front of the AR8-eligible developers (Ørsted, RWE, SSE Renewables, Equinor, Vattenfall, ScottishPower Renewables, Iberdrola, EDF, Vårgrønn, Copenhagen Infrastructure Partners) with UK-content and Clean Industry Bonus commitments — not by end of July, this week.

DESNZ updates AR8 rules — delivery-body error correction, hybrid metering, floating OW delivery

Alongside the statutory notices, DESNZ published targeted AR8 rule updates on 6 July: delivery-body error-correction procedures, appeals evidence handling, connection-requirement clarifications, hybrid metering treatment and floating offshore wind delivery requirements. The updates reflect learning from AR7 disputes and reduce timetable risk for the largest projects. Floating offshore wind now has explicit visibility of bids in results, ending speculation over whether the round would obscure clearing prices.

Strategic Renewables Unit update — SNS SAC 2026 season rehearsal complete

The Marine Directorate's Strategic Renewables Unit (SRU) published an update on 6 July on cross-cutting offshore wind issues including underwater noise management, environmental compensation and decommissioning. Ahead of the Southern North Sea Special Area of Conservation 2026 summer season (1 April–30 September), OPRED and the MMO led a Rehearsal of Concept with the Development Coordination Forum to test and refine the Dispute Resolution Process. The Environmental Compensatory Measures Reforms Statutory Instrument was laid on 21 May, and Defra guidance on the newly introduced compensation hierarchy has been published. SRU sits inside the MMO and enables continued offshore-energy expansion while protecting harbour porpoise habitat.

Southampton study — 125 GW UK OW footprint uses under 5% of UK waters

A University of Southampton study published on 6 July finds that a scenario delivering 125 GW of UK offshore wind would occupy less than 5% of UK waters. The finding reframes the UK's Clean Power 2030 conversation: sea-space is not the binding constraint on scale, installation rate and supply-chain throughput are. The study is likely to be cited in Round 6 Celtic Sea and Scottish Wider Waters leasing discussions and in Ofgem's Strategic Policy Guidance response.

Great British Energy Supply Chain Fund Round 3 open — £300m for manufacturing

The Great British Energy Supply Chain Fund Round 3 opened 1 July and runs until 30 September 2026. The £300m capital-only programme funds construction or extension of UK manufacturing facilities producing critical offshore wind and electricity-network components: mooring and anchoring, blades, nacelles, towers, monopiles, transition pieces, HVDC/HVAC cables, power transformers, HVDC converter stations, switchgear, reactive power management and control systems. The full envelope is open until 10 December 2026, though the Fund may close earlier if fully allocated. Round 4 opens 1 October.

> **NES Sales Opportunity:** The GBE Supply Chain Fund Round 3 is the single most consequential funding line for NES firms considering a facility investment in mooring, cable, transition-piece or switchgear manufacturing. Applications must show new-build or expansion (not relocation), private-sector delivery in the UK, and matched CapEx planning. Assemble a Round 3 bid now — approval timelines favour early Q3 submissions.

2. Floating Offshore Wind

Floating OW bids visible in AR8 results — supply-chain implications

AR8 statutory notices introduce visibility of bids from floating offshore wind, ending the AR7 ambiguity over floating clearing prices. This price transparency will inform lender due-diligence on Muir Mhor, Green Volt, Cenos and Salamander bidding calibration. UK-content and Clean Industry Bonus alignment become directly comparable across floating and fixed-bottom bids for the first time.

Port Talbot £64m floating OW hub — Celtic Sea readiness continues

The UK Government has awarded up to £64 million to support Port Talbot's development as a floating offshore wind hub in the Celtic Sea, with Associated British Ports the lead recipient. The funding enables terminal and marshalling upgrades ahead of Round 5 Celtic Sea projects. Aberdeen and North East Scotland ports (Nigg, Cromarty Firth, Peterhead, Montrose) retain a natural advantage for Scottish Wider Waters floating projects, but Celtic Sea infrastructure now runs credibly in parallel.

> **NES Sales Opportunity:** The Celtic Sea floating hub investment intensifies competition for floating-wind assembly work. NES ports and yards should double down on Scottish Wider Waters and Innovation and Targeted Oil and Gas leasing round positioning, marketing depth, quayside and float-out geometry advantages that Port Talbot cannot match for the largest 15–20 MW turbines.

3. Hydrogen

Siemens: five signals UK hydrogen is moving from promise to pipeline

Siemens hydrogen lead Andrew Lane published on 7 July a five-signal analysis of UK hydrogen progress: (1) capital flowing — £500m confirmed for hydrogen infrastructure in the Government Spending Review, enabling the UK's first regional hydrogen transport and storage network; (2) policy aligning — refreshed UK Hydrogen Strategy expected this autumn under the Industrial Strategy commitment; (3) supply scaling — Siemens–Paragon Resources aluminium-recycling hydrogen collaboration and other alternative-production paths advancing; (4) industry switching fuels — 10 HAR1 projects can now begin construction, with HyMarnham (GeoPura, JG Pears, Siemens) already producing hydrogen at the former High Marnham coal-fired station in Newark; and (5) grid balancing recognised — SSE–Siemens Mission H2 Power targeting a 100% hydrogen combustion system for the SGT5-9000HL gas turbine at SSE Keadby 2 in North Lincolnshire, Europe's most efficient combined cycle power plant. GeoPura has secured £114m in investment from global backers.

> **NES Sales Opportunity:** Ten HAR1 projects cleared to begin construction — including HyMarnham and eight others outside Aberdeenshire — gives NES firms with EPC delivery, compressor, electrolyser BoP, hydrogen refuelling infrastructure, safety systems, dispensing and heavy-transport hydrogen bunkering credentials a specific target list. Approach the 10 HAR1 developers this month with tier-2 partnership proposals; keep the refreshed autumn Strategy publication date in your calendars.

UKOG pivots to geological hydrogen storage — South Dorset and East Yorkshire salt caverns

AIM-listed UK Oil & Gas (UKOG) confirmed its full strategic pivot to large-scale geological hydrogen storage in interim results published on 5 July. The company's new focus centres on two salt-cavern projects: South Dorset (west of Weymouth), the only planned national-scale hydrogen storage node in southern England, with 24 salt caverns arranged in three clusters of eight at c.4,363 ft depth; and East Yorkshire near the existing Aldbrough gas storage facility, connecting to the East Coast hydrogen cluster. Preliminary design at South Dorset is complete via DEEP.KBB GmbH, one of Europe's leading salt-cavern specialists. UKOG holds an October 2025 MoU with National Gas Transmission for Project Union (the proposed national 100% hydrogen transmission backbone, first phase 2032) and a March 2026 MoU with Wales & West Utilities for HyLine South West connection. Both projects are being developed for eligibility for the UK Government's Hydrogen Transport and Storage Business Model (HT&SBM) allocation rounds beginning in 2026. The Dorset Clean Energy Super Cluster (£28bn, Dorset Council-backed, launched at UKREiiF May 2025) provides the local anchor demand — 2 GW English Channel offshore wind, hydrogen production and storage, CCS and a new Portland Port deepwater facility.

BP scraps Teesside hydrogen project for AI data centre

BP announced on 6 July it has dropped its Teesside hydrogen project after gaining approval for an AI data centre at the same site. The reversal is the clearest signal yet that AI compute demand is now competing directly with hydrogen for grid connections, planning consent and site availability in UK industrial clusters. HyNet cluster hydrogen projects remain on track through Northern Endurance Partnership progression, but the Teesside East Coast Cluster hydrogen build-out lost one of its named anchor projects.

Clean Power Hydrogen restored to trading after fundraise

Clean Power Hydrogen plc was restored to AIM trading on 7 July following completion of a fundraise and disclosure of financial position. The company's membrane-free electrolyser technology remains commercially available; trading resumption signals continued investor appetite in UK-listed electrolyser IP.

4. CCUS

Belgium–UK CO2 storage MoU under London Protocol — cross-border storage enabled

Belgium and the United Kingdom signed a Memorandum of Understanding under the London Protocol enabling cross-border transport of captured CO2 for permanent geological storage in the UK Continental Shelf. Reported in early July 2026, the MoU is the first bilateral instrument giving Belgian emitters a legal pathway to UK storage. This underpins commercial viability of the Northern Endurance Partnership, HyNet and future storage sites by expanding the addressable emitter pool from purely UK industrial sources to European Emissions Trading System counterparties.

> **NES Sales Opportunity:** Cross-border CO2 storage from Belgian industrial clusters increases the storage volume commitment for Track-1 UK sites and accelerates Track-2 (Acorn, Viking) commercial viability. NES firms in CO2 shipping and terminal engineering, jetty design, marine loading arms, CO2 metering, sampling and cross-border verification services should approach BP/Equinor/TotalEnergies NEP, Eni HyNet and Storegga Acorn now — the MoU implementation phase will need new procedural infrastructure through Q4 2026.

Fugro awarded UK first commercial CCS survey contract — Northern Endurance Partnership

Fugro was awarded the survey contract for the UK's first commercial carbon capture and offshore storage project on 10 July, covering nearshore and offshore seabed surveys, inspection, installation support and verification along the pipeline route to the East Coast Cluster storage site. Nearshore works focus on pre-lay surveys from the tunnel exit; offshore works cover the pipeline route including third-party pipeline and cable crossings. Fugro is delivering under Saipem's pipeline engineering scope. The Northern Endurance Partnership targets an injection rate of up to 4M tonnes CO2 annually from 2028. The Carbon Capture and Storage Association reported that projects across the North West, North Wales and Teesside have now awarded more than £4bn of supply chain contracts, supporting c.5,000 construction jobs, and that first CCUS clusters have met the industry's voluntary commitment to source at least 50% of goods, services and labour from UK suppliers.

5. Marine & Tidal

AR8 tidal-stream ringfence maintained — clearing prices confirmed via 6 July notices

The AR8 statutory notices confirm a maintained ringfenced tidal-stream pot inside the five-pot structure. Fixed administrative strike prices at AR7 levels signal that tidal will continue on the demonstration-to-commercial trajectory: MeyGen Phase 2 (Pentland Firth), Magallanes Renovables Holyhead Deep and Orbital Marine Power O2 successor projects remain the most credible AR8 tidal bidders. Application window opens 24 July.

> **NES Sales Opportunity:** The Pentland Firth tidal build-out remains a signature NES marine-services opportunity. NES firms in dynamic-cable manufacture, marine survey, subsea installation, ROV inspection, mooring, tidal-turbine blade repair and floating substructure fabrication should confirm engagement with Ampeak Energy (Wick and Edinburgh) and SAE Renewables now. Bidders must have UK-content and CIB positioning ready by the 24 July window.

6. Geothermal

Northern Ireland deep-geothermal consultation — closes 7 August 2026

The Department for the Economy Northern Ireland deep-geothermal regulatory consultation remains open until 7 August 2026. The consultation covers licensing, royalties and environmental safeguards for heat-only and electricity-producing geothermal. It is the primary near-term policy hook for deep-drilling operators in the UK. No new UK mainland deep-geothermal announcements were reported in the 5–11 July window.

> **NES Sales Opportunity:** NES Tier 2/3 firms with deep-drilling, completions, surface-facilities, well-integrity and CO2-injection capability have a natural read-across into deep-geothermal wells at 4–6 km depth. The 7 August NI consultation deadline is the final week to submit a capability statement that profiles supplier

> competence ahead of the first NI licensing round. Skills overlap with deepwater drilling is c.85%, structurally advantaging former oil-and-gas service firms based in Aberdeen and the surrounding cluster.

7. Decommissioning

Well-Safe Solutions lead contractor for Apache Beryl — 260+ wells across Beryl and Forties

Well-Safe Solutions was appointed lead contractor for Apache North Sea's Beryl Field decommissioning on 7 July, expanding its combined scope for Apache to more than 260 wells across Beryl and Forties, and covering platform and subsea wells. Preparatory work is underway across subsurface, well engineering and project management. Offshore well operations begin on the Beryl Bravo platform this summer, with subsea well decommissioning from 2027, beginning a multi-year programme.

Archer Limited major P&A contract — platform drilling, wireline, coiled tubing, downhole and subsea services

Archer Limited entered into a major integrated contract with Well-Safe Solutions announced on 8 July for plug-and-abandonment activities at Beryl and Forties, supporting Well-Safe's integrated P&A programme for Apache North Sea. Archer's scope includes platform drilling services, wireline, coiled tubing, downhole technologies and specialist subsea well services. The decommissioning project covers seven platforms and more than 260 wells starting in 2026. Dag Skindlo is CEO of Archer.

> **NES Sales Opportunity:** The Apache Beryl and Forties multi-year P&A programme is the largest concentrated NES decommissioning contract flow of 2026–30. Aberdeen-based NES firms in independent well verification, integrity monitoring, cementing services, plug testing, well control, subsea intervention, waste-management, topsides preparation and dive/ROV support should be in front of both Well-Safe (Aberdeen) and Archer (Aberdeen) supply-chain teams this week. First subcontract awards likely Q3 2026.

NSTA Annual Report laid in Parliament — enhanced powers and NSFP legislative package

The North Sea Transition Authority Annual Report and Accounts was laid in Parliament on 7 July, highlighting the previous 12 months' achievements and the challenges to come. Key highlights: gas storage licence offered to dCarbonX Ltd (East Irish Sea, August 2025); three carbon storage permits awarded to Eni Liverpool Bay CCS in April 2025 (Phase 1 HyNet stores 109 million tonnes CO2 — equivalent to 60m cars off the road for a year); the second UK carbon storage licensing round opened December 2025, application window closed March 2026, bids being evaluated; and consent for an appraisal well that could become a build-out of the Endurance project (March 2026). Forward-looking: the North Sea Future Plan (NSFP) 2025 envisages an enhanced NSTA role with three legislative objectives — maximise economic value, support net zero, consider impact for North Sea workers, communities and supply chains — alongside a balancing requirement. Government also proposes new powers on binding dispute resolution, decommissioning, higher financial penalties and a stronger fit-and-proper test. The 2026–2030 Data and Digital Strategy has been unveiled.

Harbour Energy North Sea tax take $1.5bn (+62%)

Harbour Energy disclosed a $1.5bn North Sea tax bill for the reporting year, up 62% year-on-year, reflecting the Energy Profits Levy increase to 55% from 1 July 2026 and the extension window. The additional tax burden is being cited by operators as accelerating decommissioning timing decisions rather than deferring them — with weaker economics on the remaining hydrocarbon tail, operators are more willing to trigger P&A programmes early.

Shell/Equinor complete Adura JV formation and Shell Penguins next-gen platform starts production

Shell and Equinor completed the formation of the Adura joint venture on 7 July, combining North Sea assets into a single independent JV structure. Separately, Shell's Penguins next-generation platform in the UK North Sea began production on 6 July, replacing subsea tie-back arrangements with a floating production, storage and offloading vessel and giving new life to an older field. Both moves signal continued investment in UK North Sea production infrastructure alongside the accelerating decommissioning programme.

8. Hydropower & Pumped Storage

Ofgem approves frequency response market rule changes — effective 31 July 2026 and 1 Jan 2027

Ofgem approved on 7 July 2026 the rule changes governing UK frequency response markets, split into two tranches: Tranche 1 effective 31 July 2026; Tranche 2 effective 1 January 2027. Dynamic Response services will be tied to Final Physical Notification (FPN) in the balancing market, ensuring providers cannot simultaneously offer flexibility and produce at will. NESO gains explicit power to publish penalty data for individual providers, increasing transparency. Providers must maintain operational metering on at least 80% of the rolling 28-day window. The changes tighten commercial rules on BESS revenue stacking and improve the operational data available to storage optimisers.

> **NES Sales Opportunity:** NES firms in BESS asset operation, optimisation platforms, monitoring and metering must reconfigure control systems and revenue stacking models to comply with the FPN tie-in and 80% metering rule ahead of 31 July. Storage-services and control-systems firms serving Field, Fidra Energy, Statera, Gore Street and Zenobe should be in commercial discussions this week to secure retrofit and upgrade scopes. Also confirm operational data-flow readiness ahead of Tranche 2 (1 January 2027).

Field 1 GWh UK BESS portfolio reaches financial close — Keith and Hartmoor

UK battery storage developer Field reached financial close on two new BESS projects on 7 July, adding 239 MW / 1 GWh to its construction portfolio and bringing total operational or under-construction capacity to 490 MW / 1.5 GWh. Keith (39 MW / 200 MWh, Scotland) helps manage the heavily constrained B4 transmission boundary in central Scotland — described as one of the longest-duration BESS projects to reach financial close in the UK. Hartmoor (200 MW / 800 MWh, Northeast England) supports integration of the Dogger Bank Wind Farm and grid support as EDF Energy's Hartlepool nuclear station approaches decommissioning. Keith financing from ING Group and Rabobank; Hartmoor from ABN AMRO and Rabobank. Keith: Sungrow battery, RJ McLeod BoP, operations 2027. Hartmoor: Envision Energy battery, H&MV Engineering BoP, energisation 2028. Optimisation via Field's in-house Gaia platform. Field has also received positive "minded to" decisions for five long-duration energy storage (LDES) projects under the UK Government cap-and-floor scheme, totalling 1.6 GW / 26.9 GWh. Combined debt and equity raised for European flexible infrastructure investments now exceeds £500m, with additional investment from CVC DIF.

> **NES Sales Opportunity:** The Keith financial close is direct high-value BESS work inside NES. RJ McLeod (Glasgow) leading BoP delivery signals Scottish supply-chain preference. NES firms in HV substation, cable installation, civil works, cooling, fire suppression, SCADA integration, control and remote-monitoring services should approach RJ McLeod, Sungrow and Field this week for Keith subcontract packages. Applies also to Hartmoor via H&MV Engineering. Field's five LDES minded-to sites (26.9 GWh) are the next wave of pumped-hydro and long-duration procurement following Coire Glas, Loch Kemp and Earba.

UK LDES Demonstration Programme details released

The UK Government released details of the Longer Duration Energy Storage (LDES) Demonstration Programme on 7 July. The programme funds demonstration of storage technologies beyond four-hour lithium-ion, covering iron-flow, zinc-based, compressed-air, gravity, thermal and pumped-hydro configurations. The programme sits alongside the Ofgem cap-and-floor scheme, with the two together forming the UK's long-duration storage support architecture. Detailed application windows and eligibility criteria are being finalised for late Q3 2026.

9. Policy

DESNZ Draft Strategic Policy Guidance for Electricity Networks Growth — consultation open 8 Jul – 19 Aug

DESNZ opened a formal consultation on 8 July on the Draft Strategic Policy Guidance for Electricity Networks Growth. The Guidance directs Ofgem, when discharging its principal objective and duties, to consider procurement approaches that strengthen domestic manufacturing capability, energy security and supply-chain resilience — directly relevant to the great British Energy Supply Chain Fund. The consultation closes 19 August 2026. This is the first time Ofgem's procurement judgement is being formally reshaped by statutory guidance around industrial policy and supply-chain outcomes, rather than pure economic efficiency. The consultation response will inform the final SPG expected Q4 2026.

> **NES Sales Opportunity:** NES supply-chain firms have a direct interest in the outcome of the SPG consultation. A short written response — individually and via NES bodies such as Aberdeen Renewables Energy Group, Global Underwater Hub and Scottish Renewables — should reinforce the case for domestic manufacturing preferences in Ofgem-supervised procurement (offshore transmission tenders, network development plans, LDES capex allocations). Response deadline 19 August 2026 is achievable this month.

PIA 2025 direct-in / direct-out powers commence 24 July

The Planning and Infrastructure Act 2025 provisions enabling the Secretary of State to direct certain projects in England (and certain adjacent waters and Renewable Energy Zones) out of the NSIP regime — and to direct projects into it — have been confirmed as coming into effect on 24 July 2026. The Government published new guidance on 3 July 2026 to support applicants seeking to use the "direct-out" and "direct-in" powers, both taking effect on 24 July. The tools give the Secretary of State a new intervention capability for nationally significant energy projects.

Ofgem revised consumption values — headline cap now £1,663

Ofgem's revised consumption values, effective from the July–September 2026 cap, now express the typical dual-fuel household bill as £1,663 (vs the £1,862 figure under the earlier consumption values). The underlying unit rates and standing charges are unchanged — the difference reflects a lower assumed annual consumption. All previous market commentary and the 13% rise remain accurate on a like-for-like basis; the numerical presentation has changed.

Blair Institute urges Burnham to ditch 95% clean power 2030 target

The Tony Blair Institute for Global Change published on 6 July advice urging Labour leadership frontrunner Andy Burnham to drop the current 95% clean power by 2030 target. The Institute argues the target is impossible to deliver on time and is now a political liability. Ed Miliband's position at DESNZ remains formally unchanged. Nicholas Stern separately advocated for Miliband to become Chancellor under a Burnham premiership. Bill Esterson, Labour energy MP, opened the door on 5 July to lifting the ban on new North Sea drilling licences under specific conditions. These developments together signal that Labour energy policy under new leadership may be materially rebalanced in favour of investment realism.

10. Key Upcoming Events for NES Companies

Calendar of confirmed events, deadlines and regulatory windows in the next eight weeks (12 July – 5 September 2026):

Date	Event	Location	NES Relevance
24 July 2026	AR8 application window opens	Online (DESNZ)	High
24 July 2026	PIA 2025 direct-in / direct-out powers commence	UK statutory	High
31 July 2026	Ofgem frequency response Tranche 1 rules effective	Online (Ofgem / NESO)	High
7 August 2026	Ofgem LDES Window 1 consultation closes	Online (Ofgem)	High
7 August 2026	NI deep-geothermal regulatory consultation closes	Online (DfE NI)	Medium
14 August 2026	NSTA ACE production consent applications close	Online (NSTA)	High
17 Aug–11 Sep 2026	NSTA Flaring and Venting consent window	Online (NSTA)	High
18–20 August 2026	Floating Offshore Wind Conference & Exhibition	Aberdeen P&J Live	High
19 August 2026	DESNZ Strategic Policy Guidance consultation closes	Online (DESNZ)	High
by 26 August 2026	Ofgem next quarterly price cap announcement	Online (Ofgem)	Medium
30 September 2026	GBE Supply Chain Fund Round 3 closes	Online (GBE)	High
Autumn 2026	Refreshed UK Hydrogen Strategy expected	DESNZ	High

11. Grant Funding & Support Mechanisms Active This Week

Programme	Value / Scope	Stage	Deadline
Great British Energy Supply Chain Fund Round 3	£300m capex for OW & network component manufacturing (mooring, blades, monopiles, cables, transformers, switchgear)	Open	30 Sep 2026
AR8 application window	Five-pot structure; 20 OW projects eligible; floating OW visibility; £200m initial CIB	Opens 24 Jul	TBC
NSTA ACE production consents	c.285 consents effective 1 Jan 2027; annual UKCS submission	Open	14 Aug 2026
NSTA Flaring and Venting consents	Emissions consent window under NSTA targets	Opens 17 Aug	11 Sep 2026
NI deep-geothermal consultation	Licensing, royalties, environmental framework	Open	7 Aug 2026
Ofgem LDES Window 1 (cap-and-floor)	16 minded-to projects; Field five LDES 1.6 GW / 26.9 GWh included	Open	7 Aug 2026
DESNZ Strategic Policy Guidance for Networks Growth	Ofgem procurement approach shift towards domestic manufacturing	Open	19 Aug 2026

Programme	Value / Scope	Stage	Deadline
UK LDES Demonstration Programme	Non-Li-ion demo funding (iron-flow, zinc, CAES, gravity, thermal, pumped)	Detail released 7 Jul	Late Q3 2026
Clean Industry Bonus (CfD supplement)	£200m initial budget; UK-content, fair work, community-benefit scoring	In force	AR8-linked
HT&SBM allocation rounds	Hydrogen Transport and Storage Business Model — first rounds during 2026	Positioning	Rolling

12. Sales Opportunity Summary for NES Supply Chain Companies

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

Opportunity	Description	Window	Priority
Apache Beryl & Forties P&A programme	260+ wells / 7 platforms with Well-Safe (lead) and Archer (integrated services): well verification, integrity, subsea intervention, waste-management, dive/ROV	Now → 2030+	★★★★★
AR8 supply-chain positioning (20 OW projects)	Fabrication, monopiles, jackets, cable protection, subsea inspection, OFTO transfer for AR8 fixed-bottom and floating OW bidders — UK-content and CIB alignment	Now → 24 Jul	★★★★★
GBE Supply Chain Fund Round 3 bid	£300m capex for UK manufacturing of mooring, blades, monopiles, cables, transformers, switchgear — new-build or expansion	Now → 30 Sep	★★★★★
NSTA ACE 2027 production consents	c.285 consents open until 14 Aug: emissions monitoring, integrity, methane detection, compliance reporting, verification	Now → 14 Aug	★★★★★
Field Keith BESS Scotland (39 MW / 200 MWh)	RJ McLeod BoP, Sungrow battery: HV substation, cable, civils, cooling, fire suppression, SCADA integration	Q3 2026 → 2027	★★★★★
Ofgem frequency response Tranche 1 compliance retrofit	BESS control-systems, FPN integration, revenue-stack reconfiguration, 80% metering compliance for Fidra, Field, Statera, Gore Street, Zenobe	Now → 31 Jul	★★★★★
Belgium–UK CO2 storage MoU implementation	CO2 shipping terminals, jetty design, marine loading arms, metering, sampling, cross-border verification for NEP, HyNet, Storegga Acorn	Q3 – Q4 2026	★★★★
Fugro Northern Endurance survey subcontracts	UK first commercial CCS: pipeline route survey, nearshore inspection, installation support, third-party crossings	Q3 2026 → 2027	★★★★

Opportunity	Description	Window	Priority
HAR1 10-project construction start (excl BP Teesside)	EPC, compressor, electrolyser BoP, hydrogen refuelling infrastructure, safety systems, dispensing at HAR1 sites now cleared to build	Q3 2026 → 2028	★★★★
DESNZ Strategic Policy Guidance response	Written submission reinforcing domestic manufacturing preferences in Ofgem-supervised procurement (individually and via NES bodies)	Now → 19 Aug	★★★★
UKOG salt-cavern hydrogen storage	South Dorset 24-cavern development and East Yorkshire concept feasibility: DEEP.KBB partnership, cavern engineering, surface facilities, HT&SBM positioning	H2 2026 → 2027	★★★
UK LDES Demonstration Programme	Non-Li-ion demo funding (iron-flow, zinc, CAES, gravity, thermal, pumped) — partnership positioning	Q3 – Q4 2026	★★★
MeyGen Phase 2 / Pentland Firth tidal supply chain	Dynamic cable, marine survey, subsea installation, ROV inspection, mooring — Ampeak Energy Wick/Edinburgh engagement	Q3 2026 → Q2 2027	★★★★
NI deep-geothermal consultation submission	Capability-statement filing (deep-drilling, completions, surface facilities) ahead of NI licensing round	Closes 7 Aug	★★★
Field 1.6 GW / 26.9 GWh LDES pipeline	Five “minded-to” LDES projects: EPC, HV substation, cable, civils, control systems (post cap-and-floor licence)	Q4 2026 → 2029	★★★

Sources Used

Numbered references in order of appearance. Each link opens the primary source.

[1] Contracts for Difference (CfD) Allocation Round 8: statutory notices — GOV.UK / DESNZ (last updated 6 July 2026)

[2] Miliband to launch giant green energy subsidy campaign — The Telegraph (6 July 2026)

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