UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 8 August 2026

Coverage Period	Audience	Classification
2 – 8 August 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 8 August 2026 were dominated by two closing statutory windows that reset the commercial map for the UK offshore low-carbon supply chain.

On Friday 7 August, applications closed for AR8 — the UK's eighth Contracts for Difference Allocation Round. More than 17 GW of offshore wind capacity was eligible to enter Pot 3 (fixed-bottom) at an Administrative Strike Price of £113/MWh (2024 prices), and around 800 MW of floating wind was eligible for Pot 4 alongside the new Other Deepwater Offshore Wind (ODOW) category at £271/MWh. NESO qualification runs 10 August to 16 September. Results will be announced between 27 November 2026 and 17 February 2027.

On the same day, Ofgem's Long Duration Electricity Storage (LDES) cap-and-floor Window 1 minded-to consultation closed — supporting a portfolio of 16 projects totalling 7,645 MW, including three Scottish pumped storage schemes (Coire Glas 1,440 MW, Loch Kemp 660 MW, Earba 1,800 MW), 11 lithium-ion batteries, one compressed-air (TeesCAES) and one vanadium/zinc flow (Frontier Legacy). Final awards land in autumn 2026.

Together, these two windows are the largest commercial procurement gate the UK low-carbon supply chain has had all year.

Political and regulatory activity intensified on Rosebank and Jackdaw. Offshore Energies UK filed formal responses to both public consultations, backing the combined £10.8 billion Adura projects. The industry body cited £28.7 billion of forecast gross value added over the fields' lives, £1.4 billion of tax revenues before the end of this Parliament rising to £3.8 billion by 2034, and Jackdaw supplying more than 6% of UK gas demand next winter. The Jackdaw OPRED consultation closes 10 August; Rosebank closes 17 August. DESNZ Secretary Miatta Fahnbulleh will decide both.

Separately, the Telegraph reported on 7 August that the NSTA now estimates at least £28 billion will be spent shutting down the North Sea between now and 2035, with implied Treasury tax relief around £13 billion — and £44 billion of total decommissioning still remaining. On 13 August, the NSTA publishes its full 2026 UKCS Decommissioning Cost and Performance Update with an industry webinar featuring Bureau Veritas, Boskalis Subsea and OEUK.

On floating wind, the 40-tonne Squid quick-connect mooring and cable system — developed by Encomara (subsidiary of Aurora Energy Services, Inverness; fabricated at Huntly, Aberdeenshire) — began full-scale wet trials at the Ardersier Energy Transition Facility on 6 August. This is the first floating offshore wind trial at Haventus's Ardersier and moves the technology from TRL 8 towards commercial deployment, with reported potential to cut floating LCOE by up to 15%.

On BESS, Santander UK announced debt facilities totalling more than £50 million on 6-7 August for Econergy's 80 MW / 240 MWh Immingham project (£42.7m senior debt) and Brockwell Energy's 60 MW / 120 MWh Inchbean

Farm in East Ayrshire; Masdar closed £97 million of financing on 3 August for 205 MW / 540 MWh of BESS in Rochdale, Cardiff and Chesterfield, its first UK BESS financing under a £1 billion commitment.

In upstream, Shell resumed FPSO oil production in the North Sea on 6 August via a new export route.

The next two weeks are the busiest single sequencing gate of Q3: NESO AR8 qualification begins 10 August, Jackdaw closes 10 August, the NSTA UKCS Decommissioning Update publishes 13 August, the Fearna 1,800 MW pumped storage PLI Pre-Enquiry Meeting is 13 August, NSTA ACE Programme applications and Ofgem LDES cap-and-floor responses close 14 August, and Rosebank plus Fusion NPS EN-8 close 17 August.

NES firms must confirm subcontracting Letters of Intent with Tier 1 EPCIs on AR8 bids this fortnight, position for LDES pumped storage and BESS delivery from autumn 2026, and engage BP's divestment advisers on transition contract continuity.

1. Offshore Wind — Fixed Bottom

AR8 CfD application window closes: 17 GW+ eligible offshore wind for Pot 3 (7 August 2026)

The eighth Contracts for Difference Allocation Round (AR8) closed for applications at 12:00 GMT+1 on Friday 7 August. More than 17 GW of offshore wind capacity was eligible to enter Pot 3 (fixed bottom) at an Administrative Strike Price of £113/MWh in 2024 prices. Pot 3 will carry separate clearing prices for offshore wind projects connecting in tariff zones 1–12 versus 13–27, per the Pot and Price Notice. NESO qualification assessment runs 10 August to 16 September. The Contract Budget Notice is expected in November. Results will be announced across all technologies simultaneously between 27 November 2026 (earliest) and 17 February 2027 (latest), depending on which allocation timetable the round runs to. AR8 is the first round to require Gate 2 (or Gate 1 CPCR) connection status, banning legacy Gate 1 projects.

> **NES Sales Opportunity:** AR8 is now in the qualification phase. NES firms should confirm subcontracting Letters of Intent with the Tier 1 EPCIs and OEMs bidding into Pot 3 — ScottishPower Renewables, SSE Renewables, Ocean Winds, Iberdrola, Vattenfall, Equinor, Ossian JV (SSE/CIP/Marubeni) — across foundation fabrication, dynamic cabling, hazardous-area electrical, coatings, marine coordination and offshore substation topsides. Aberdeen offices of Tier 1 developers are direct engagement points during qualification. Clean Industry Bonus is now applicable across all offshore wind categories, so UK content evidence is decisive at bid.

AR8 Pot 4: 800+ MW floating wind and new ODOW category open (7 August 2026)

Pot 4 opened at £271/MWh for floating offshore wind and the new Other Deepwater Offshore Wind (ODOW) category. Around 800 MW of floating wind capacity was eligible for AR8 — revised upwards from the original 232 MW cited earlier in AR8 documents. The ODOW category covers non-floating deepwater designs using buoyancy but fixed to the seabed in 50–150 m depth (including Tension-Leg Platforms). Pot 4 rules for AR8 include an extended 24-month Longstop Period (up from 12) and a reduced Required Installed Capacity threshold of 85% (down from 95%) to reflect scale and complexity of floating and deepwater projects.

> **NES Sales Opportunity:** The AR8 Pot 4 changes create a less-contested route into UK floating wind supply. NES firms in floating foundation fabrication, mooring, dynamic cables, offshore substation topsides, hazardous-area electrical and marine coordination should target ODOW-eligible bidders (Salamander,

Cenos, MarramWind, Green Volt) plus Encomara-linked demonstration projects. The 24-month Longstop offers greater window for design and supply-chain readiness before construction gate.

Squid 40-tonne floating wind connection system begins wet trials at Ardersier (6 August 2026)

Encomara — a subsidiary of Inverness-based Aurora Energy Services — began full-scale wet trials of its Squid floating offshore wind quick-connect mooring and cable system at the Ardersier Energy Transition Facility on 6 August, following ABS Design Assessment received in June. The 40-tonne Squid unit was fabricated at Huntly, Aberdeenshire and moved by road via Keith and Buckie before being loaded to vessel and towed round the headland to Ardersier (14 miles east of Inverness on the Moray Firth). Wet trials continue to end-August. This is the first floating offshore wind trial at Haventus's Ardersier facility. Encomara reports the Squid could reduce floating wind installation duration by up to 50%, cut LCOE by up to 15% and deliver savings around £135 million per GW of floating capacity installed.

NES Sales Opportunity: The Squid wet trial confirms Encomara/Aurora Energy Services and Haventus at Ardersier as anchor tenants for Scottish floating wind supply-chain build-out. NES firms in fabrication (Huntly-linked), marine coordination, ROV support, ports & logistics, hazardous-area electrical, coatings, testing and QHSE should engage Encomara, Aurora Energy Services (Inverness) and Haventus on demonstration mobilisation, TRL 9 progression and 2027–28 commercial rollout. Cross-basin transferable capability from Aberdeen subsea suppliers is directly applicable.

AR8 Pot 3 separate clearing price rule confirmed for transmission tariff zones (August 2026)

Under the AR8 Pot and Price Notice, offshore wind projects connecting to the Transmission System in tariff zones 1–12 (Scotland-anchored) will have a separate clearing price to those connecting in zones 13–27 (rest of GB). Details of any project-size-based separate clearing prices will follow in the Contract Budget Notice. The Government is minded not to apply a size-based separate clearing price in AR8. The zonal clearing structure is designed to increase Scottish-anchored offshore wind's ability to compete against nearer-to-load southern projects.

AR8 sealed-bid single-bid rule and no flexible bids confirmed (August 2026)

Under revised AR8 rules, applicants for Solar PV and all wind technologies (onshore, offshore fixed, offshore floating, remote island and ODOW) may only submit one sealed bid, and flexible bids are explicitly banned within the Contract Allocation Framework. Government will maintain visibility of anonymised sealed bids for fixed-bottom offshore wind and — new for AR8 — will also have visibility of Floating Offshore Wind and ODOW sealed bids. The single-bid rule concentrates strategic pricing decisions in a single moment and heightens the value of accurate pre-bid subcontractor cost lock-in.

2. Floating Offshore Wind

Squid wet trial at Ardersier (6 August 2026, see Section 1)

The Encomara Squid 40-tonne quick-connect wet trial at Ardersier is the standout Scottish floating wind supply-chain story of the week — see Section 1 for full detail. Squid is now the highest-TRL floating wind mooring-and-cable installation technology in the UK and the first commercial test at Haventus's Ardersier facility.

AR8 Pot 4 extends floating Longstop to 24 months and lowers Required Installed Capacity to 85% (August 2026)

The AR8 Contract Allocation Framework confirmed the extended Longstop Period for floating offshore wind of 24 months (up from 12) and reduced the Required Installed Capacity threshold at Target Commissioning Window from 95% to 85%. Both changes acknowledge the scale and complexity of large floating projects. The changes apply for AR8 only and are calibrated to make floating wind bids commercially viable at a first-of-a-kind stage.

> **NES Sales Opportunity:** The 24-month Longstop and lower 85% RIC threshold give floating supply-chain firms a materially longer runway to secure orders and deliver early units. NES firms should now push for late-2026 through 2028 commercial framework commitments from floating developers rather than assuming compressed schedules.

Floating Offshore Wind Conference 2026 opens Aberdeen 18–20 August (August 2026)

The 2026 Floating Offshore Wind Conference and Exhibition takes place at P&J Live, Aberdeen from 18 to 20 August. The event is the flagship UK floating wind gathering, drawing developers (Green Volt, Cenos, MarramWind, Salamander, Bellrock, Llŷr), Tier 1 EPCIs (Aker Solutions, Saipem, Unitech, Nadara), certifiers (DNV, ABS, LR) and supply-chain firms.

> **NES Sales Opportunity:** The Aberdeen Floating Wind Conference is the single most important floating-wind sales meeting of the year for NES Tier 2/3 firms. Attendance is a de-facto requirement. Focus should be on Encomara/Aurora Squid demonstration follow-up meetings, ScotWind developer procurement, floating foundation fabrication, dynamic cable, mooring, electrical infrastructure, ROV and marine coordination scope. Diary the OEUK breakfast on 8 August and pre-book meetings with Aker Solutions and Nadara.

3. Hydrogen

Fusion Energy Draft National Policy Statement (EN-8) consultation closes 17 August (August 2026)

The Draft National Policy Statement for fusion energy (EN-8) consultation, published by DESNZ, remains open until 17 August 2026. EN-8 is the UK's first dedicated national policy framework for fusion siting and consenting and links directly to the STEP fusion prototype at West Burton and the wider fusion cluster. For hydrogen supply-chain firms, EN-8 has read-across because fusion prototypes require large-scale hydrogen handling, cryogenic gas systems and tritium containment. Response deadline is 17 August via GOV.UK citizen space.

> **NES Sales Opportunity:** EN-8 opens a formal position window for NES firms with tritium, cryogenic and high-purity gas handling capability to establish credentials with the emerging UK fusion cluster. High-integrity welding, hazardous-area electrical, NDT, coatings and QHSE providers with hydrogen/cryogenic experience should submit formal responses referencing UKAEA STEP and West Burton siting. Submissions become part of the supply-chain evidence base for future fusion procurement.

DESNZ £100bn private clean energy investment claim (7 August 2026)

DESNZ announced on 7 August that the UK has secured over £100 billion of private clean energy investment commitments since July 2024. The Department credited AR8, GBE Supply Chain Fund, HAR1/HAR2 hydrogen contracts, Track 1 and Track 2 CCS clusters, and offshore wind investment as anchor drivers. The announcement was timed to coincide with the AR8 application close and to reinforce the Government's Modern Industrial Strategy narrative. Direct impact for NES supply chain: the investment envelope supports continued Tier 1 EPCI and OEM commitment across offshore wind, CCUS and hydrogen through 2027.

HAR1 hydrogen project progress under review — Barrow Green Hydrogen at FEED-to-execution transition (August 2026)

The HAR1 electrolytic hydrogen contract portfolio, awarded in December 2023, continues its transition from FEED to execution. Barrow Green Hydrogen (30 MW PEM electrolysis, developed by GHECO/Carlton/Schroders with

Ramboll as Owner's Engineer and displacing 50% of Kimberly Clark Barrow's natural gas) remains the closest HAR1 project to FID. Wider HAR1 delivery timing pressures continue — highlighted by Chesterfield Special Cylinders' recent CEO transition citing hydrogen market timing delays.

DESNZ Modern Industrial Strategy: hydrogen production and demand priorities reaffirmed (August 2026)

DESNZ reaffirmed hydrogen production and industrial demand as anchor priorities within the Modern Industrial Strategy Year 1 review. HAR2 electrolytic hydrogen contract awards are expected later in 2026. HAR3 process design is underway. NES firms should note the wider HAR2 pipeline includes Scottish sites at Sullom Voe (Veri Energy/EnQuest) and Grangemouth Cromarty (Ineos) with pre-FEED continuing.

4. CCUS

Ongoing HyNet mobilisation: Liverpool Bay CCS seabed lease and NEP Hartlepool offshore construction (August 2026)

Follow-on activity from the previous fortnight's milestones continues: the Liverpool Bay CO_2 storage seabed lease with Eni CCUS Holding (signed 29 July, unlocking 109 Mt storage and £2 billion supply-chain investment) and Northern Endurance Partnership offshore construction at Hartlepool (Saipem mobilised 27 July for the 149 km subsea CO_2 pipeline). NEP has now awarded over £2 billion to more than 260 UK companies. Track 1 first CO_2 injection remains targeted for 2028. Track 2 (Acorn, Viking) awaits final development consent.

> **NES Sales Opportunity:** Track 1 CCS is now firmly in construction mobilisation. NES firms in subsea pipeline installation, ROV support, geotechnical, high-integrity welding, coatings and marine coordination should approach Saipem (Aberdeen and London offices), Eni CCUS Holding, and Wood/Petrofac/Worley as expected Tier 1 EPCIs. Aberdeen firms with subsea gas-field decommissioning credentials have directly transferable capability. Track 2 supply-chain positioning window remains open for Acorn and Viking through 2027.

NSTA data-and-insights update reaffirms CCUS storage licensing pipeline (August 2026)

The NSTA published a data-and-insights update on 6 August referencing the 2025 UKCS Decommissioning Cost and Performance Update ahead of the 13 August 2026 Update publication. The NSTA reaffirmed a total of £44 billion of remaining UKCS decommissioning at 2024 constant prices, with £27 billion projected 2023–2032 — a large fraction of which will feed subsea reuse and CO_2 storage capability development, particularly for Viking and Acorn. The 2nd Offshore CO_2 Storage Licensing Round remains anchored on the Penspen and DNV pipeline studies published on 30 July.

5. Marine & Tidal

Continued Mocean Blue Core mobilisation and CorPower DNV certification progress (August 2026)

Mocean Energy (Edinburgh) continues to build out its Blue Core floating data centre concept following its £5 million raise announced 28 July. The company is targeting 6 GW of offshore floating data centre capacity by 2040, combining wave energy converter technology with solar generation for offshore data centres. First demonstrations targeted for 2027 off the Scottish west coast. In parallel, CorPower Ocean's DNV certification for the C4 WEC unit (received 21 July) supports EMEC Orkney and Celtic Sea deployments. UK marine and tidal remains a niche but distinctive Scottish export vector.

> **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, and EMEC Orkney are the priority engagement points. NES firms should keep marine/tidal on the annual sales calendar even in weeks with limited news, as the pipeline of demonstrator deployments through 2027–28 is material.

6. Geothermal

Northern Ireland deep-geothermal consultation preparing for closure (August 2026)

The Northern Ireland deep-geothermal consultation (Department for the Economy) closed on 7 August. The consultation covers regulatory framework, licensing and support mechanisms for deep-geothermal energy in Northern Ireland — the first regulatory step towards a deep-geothermal market on the island. Northern Ireland has some of the best UK deep-geothermal resources (Larne Basin, Lough Neagh Basin). Formal responses will feed a policy paper due later in 2026.

> **NES Sales Opportunity:** UK geothermal news remains thin, but the NI consultation closure moves Northern Ireland closer to a live deep-geothermal market. NES firms with drilling, HV electrical, mechanical, high-integrity welding, coatings and QHSE credentials transferable from UKCS oil & gas should pre-position with Northern Ireland stakeholders and NI Water/Belfast Council. Deep-geothermal is also a natural extension of Aberdeen well-abandonment technology and workforce.

7. Decommissioning

Telegraph: NSTA estimates £28bn UK decom spend to 2035, £13bn Treasury tax relief (7 August 2026)

The Telegraph reported on 7 August that the NSTA now estimates at least £28 billion will be spent decommissioning the UK North Sea between now and 2035, implying around £13 billion of Treasury tax relief over that period. The total UKCS decommissioning cost is estimated at £48 billion, with total tax rebate ultimately approaching £30 billion. The updated NSTA figures reinforce the record 2024 spend of £2.4 billion and the 2023–2032 forecast of £27 billion in 2024 constant prices. The story lands ahead of the NSTA's full 2026 UKCS Decommissioning Cost and Performance Update publication on 13 August.

> **NES Sales Opportunity:** The NSTA cost figures confirm UKCS decommissioning as the single largest, longest-dated addressable market for NES supply chain through 2035. NES firms in wells P&A (the 40–50% single largest cost line), topsides removal, subsea infrastructure, ROV support, coatings, high-integrity welding, marine coordination and QHSE should now formalise 2027–30 forward workbooks with operator planning teams. The 13 August NSTA webinar (Bureau Veritas, Boskalis Subsea, OEUK) is the single most important decom sales meeting of Q3.

NSTA 2026 UKCS Decommissioning Cost and Performance Update to publish 13 August (August 2026)

The NSTA confirmed via LinkedIn that its 2026 UKCS Decommissioning Cost and Performance Update will publish on 13 August 2026, accompanied by a 10:00 UK webinar. Confirmed webinar panellists include Bureau Veritas, Boskalis Subsea and Offshore Energies UK. The Update will refresh cost benchmarking across P&A, topsides removal, subsea infrastructure removal, pipeline decommissioning and site clearance and monitoring. The Update is a critical planning input for NES firms building 3–5-year decom sales pipelines.

Xodus Group selected for next phases of Northern Endeavour decom (5 August 2026)

Xodus Group (Aberdeen, part of Subsea 7) was selected to support the next phases of decommissioning for the Northern Endeavour FPSO. The Northern Endeavour scope, though physically located in Australian waters, is directly transferable NES capability development. Xodus' selection reinforces Aberdeen's engineering leadership on ageing FPSO decommissioning and adds international workbook depth to a NES firm.

Shell resumes FPSO oil production in North Sea via new export route (6 August 2026)

Shell resumed FPSO oil production in the North Sea on 6 August using a new export route — the previous Brent Charlie route having been decommissioned in 2021. The restart demonstrates continued asset life extension for late-life UKCS assets and creates fresh operational scope for marine and subsea support. Shell UK remains one of the largest UKCS operators alongside Harbour, Ithaca, EnQuest and Serica.

BP UKCS divestment process ongoing — supplier due diligence and transition risk continues (August 2026)

BP's UK North Sea business sale (announced 31 July under Murray Auchincloss, advised by Morgan Stanley and Rothschild) continues into supplier due diligence and bidder engagement. Expected bidders remain Ithaca Energy, EnQuest, Serica, Harbour Energy and international private-equity vehicles. Transaction timing is expected to run into H1 2027. Hundreds of NES Tier 2/3 contracts across marine, subsea, wells, decommissioning, ROV, geotechnical, coatings, NDT and QHSE remain in transition review. Well-Safe Solutions' recent move into full Well Operatorship (30 July) is expected to attract follow-on scope from divestment activity.

Petrofac and Wood ongoing UKCS late-life field service framework activity (August 2026)

Petrofac continues its late-life UKCS service framework programme (extensions with Ithaca Energy and ONEgas West confirmed in late July) alongside Wood, Worley and Well-Safe Solutions. The wider UKCS late-life integrated services market continues to consolidate ahead of the BP UKCS sale process. Perenco's Southern North Sea decommissioning at Galahad and Amethyst (Petrodec Obana platform-removal vessel) continues through August.

8. Hydropower & Pumped Storage

Ofgem LDES cap-and-floor Window 1 consultation closes: 7,645 MW portfolio (7 August 2026)

Ofgem's Long Duration Electricity Storage (LDES) cap-and-floor Window 1 minded-to consultation closed on 7 August 2026. The minded-to portfolio comprises 16 projects totalling 7,645 MW / 136.9 GWh across four technologies: three pumped storage hydro projects (Coire Glas 1,440 MW SSE Renewables, Loch Kemp 660 MW Statera Energy, Earba 1,800 MW Gilkes Energy) totalling 3,900 MW (51% of capacity); 11 lithium-ion battery projects (including Statera East Claydon 500 MW / 12-hour and Sundon 500 MW / 8-hour); one compressed-air energy storage project (TeesCAES 50 MW); and one vanadium/zinc flow project (Frontier Legacy 65 MW). Formal minded-to consultation responses are due to Ofgem by 14 August. Final cap-and-floor awards are expected in autumn 2026, alongside delivery requirements and licence conditions.

> **NES Sales Opportunity:** The LDES Window 1 portfolio triggers the largest single UK pumped storage procurement wave in a generation. NES firms in high-voltage electrical, mechanical fabrication, hazardous-area electrical, control systems, hydraulic engineering, coatings and welding should immediately engage SSE Renewables (Coire Glas, Perth/Aberdeen offices), Statera Energy (Loch Kemp), Gilkes Energy (Earba) and their expected Tier 1 EPCIs on multi-year framework subcontracting. The three Scottish pumped storage schemes are anchor NES opportunities for 2027–32. BESS project developers Statera, Frontier and Zenobe (11 Li-ion projects) are also active first-contact points.

Ofgem LDES draft special licence conditions call for input closes 18 August (August 2026)

Ofgem's parallel call for input on the LDES draft special licence conditions (published 21 July, guidance published 28 July) remains open until 11:59pm on 18 August 2026. Key licence changes include Delivery Plan governance regime for proactive progress monitoring, graduated Back Stop Delay Factor, availability target lowered to 92.5% for pumped storage hydro to allow maintenance downtime, restrictions on short cycling of LDES assets, and a watered-down obligation to maximise revenue. P90 construction cost overrun risk remains with developer. Investor and funder feedback continues to focus on P90 unadjusted floor treatment.

Fearna 1,800 MW pumped storage Pre-Enquiry Meeting: 13 August (August 2026)

Locogen's Fearna 1,800 MW pumped storage scheme has its Highland Council Planning and Local Improvement (Scotland) Act 2019 Pre-Enquiry Meeting on Wednesday 13 August 2026. Fearna is one of the fastest-progressing pumped storage schemes outside of LDES Window 1 (Fearna is not on the minded-to portfolio) and could participate in future LDES windows. Scottish pumped storage pipeline outside Window 1 includes Balliemeanoch, Loch na Cathrach and Fearna — an aggregate of several GW.

> **NES Sales Opportunity:** The Fearna Pre-Enquiry Meeting is a rare opportunity for NES pumped storage supply-chain firms to engage a developer at pre-application stage. Locogen (based in Edinburgh with Scottish highlands hydropower footprint) is directly reachable. NES firms in high-voltage electrical, tunnelling, hydraulic engineering, mechanical fabrication and coatings should attend or register interest. Positioning across Fearna, Coire Glas, Loch Kemp and Earba secures the full Scottish pumped storage forward pipeline.

Santander UK debt finance for Econergy 80 MW/240 MWh Immingham + Brockwell 60 MW/120 MWh Inchbean BESS (6–7 August 2026)

Santander UK announced two UK BESS debt facilities in a single week. On 6 August, Santander confirmed senior debt for Brockwell Energy's 60 MW / 120 MWh Inchbean Farm BESS in East Ayrshire (financial close achieved in May, with Fluence as EPC). On 7 August, Santander confirmed £42.7 million debt for Econergy's 80 MW / 240 MWh Immingham BESS (including £38.4 million construction facility, VAT revolving and debt-service reserve) alongside a 10-year EDF revenue floor agreement. Combined the two projects account for 140 MW / 360 MWh of new UK BESS financial close in Q3 2026.

> **NES Sales Opportunity:** The Santander financings put two live UK BESS projects into EPC mobilisation, one in NES-proximate East Ayrshire (Inchbean). NES firms in HV electrical, hazardous-area systems, civils, structural steel (BHC Ltd), coatings, QHSE and marine coordination (Immingham) should engage Fluence (EPC on Inchbean), EDF (revenue-floor partner), Brockwell Energy and Econergy directly. Fluence Aberdeen presence supports cross-basin subcontracting.

Masdar closes £97 million first UK BESS financing for 205 MW / 540 MWh Rochdale, Cardiff, Chesterfield (3 August 2026)

Masdar (Abu Dhabi Future Energy Company) closed £97 million of financing on 3 August for its first UK BESS portfolio — 205 MW / 540 MWh across three projects in Rochdale, Cardiff and Chesterfield. The financing is part of Masdar's £1 billion UK commitment announced in 2025 covering solar, BESS and offshore wind investment. First UK BESS financing under Masdar's Skyborn/Envision affiliate structure signals continued Gulf sovereign capital inflow into UK grid storage. The BESS portfolio is expected to reach commercial operations across 2027.

Fidra Energy West Burton C 500 MW / 1.1 GWh BESS construction mobilisation continues (August 2026)

Fidra Energy's 500 MW / 1.1 GWh West Burton C BESS (financial close reached 28 July, CMS as legal adviser) continues into construction mobilisation. West Burton C is one of the largest single-site UK BESS projects to reach financial close in 2026. Fidra's parent, Trafigura, brings global battery supply chain access. Commercial operations targeted for 2027.

9. Policy

OEUK backs Rosebank + Jackdaw in formal OPRED consultation responses (7 August 2026)

Offshore Energies UK filed its formal responses to the Rosebank and Jackdaw OPRED public consultations, backing the £10.8 billion combined Adura projects. OEUK cited £28.7 billion in gross value added over the fields' producing lifespans; £1.4 billion of tax revenues before the end of this Parliament, rising to £3.8 billion before the expected end of the next Parliament in 2034; and Jackdaw supplying more than 6% of UK gas demand next winter (equivalent to 1.4 million households). Displacing UK production with imported gas creates emissions up to four times higher, OEUK argued. The Jackdaw consultation closes 10 August; Rosebank closes 17 August. Miatta Fahnbulleh will deliver both decisions from DESNZ.

> **NES Sales Opportunity:** Rosebank and Jackdaw approvals are the largest single upstream UKCS decision of 2026. NES firms with existing or pre-qualified positions on Adura (Equinor operated), Ithaca and Shell (JV partner on Jackdaw) frameworks should confirm subcontracting Letters of Intent and post-consent mobilisation plans this fortnight. Approach the Aberdeen offices directly. Anti-consent risk remains material but the Burnham government's pragmatic public position and OEUK's strong economic case support approval.

DESNZ £100bn+ private clean energy investment claim (7 August 2026)

The Department for Energy Security and Net Zero announced on 7 August that the UK has secured over £100 billion of private clean energy investment commitments since July 2024. The claim was timed to coincide with the AR8 close and the Modern Industrial Strategy Year 1 anniversary. Anchors cited include AR8 (17 GW eligible offshore wind); GBE Supply Chain Fund; HAR1/HAR2 hydrogen; Track 1 and Track 2 CCS; and floating offshore wind Test-and-Demonstration projects (Llŷr, Salamander). The announcement supports continued Tier 1 EPCI mobilisation for 2027–30 delivery.

DESNZ Strategic Policy Guidance for Electricity Networks Growth consultation — closes 19 August (August 2026)

DESNZ published a draft Strategic Policy Guidance for Electricity Networks Growth (SPG) for consultation, with response deadline 19 August 2026. The SPG sets forward guidance to Ofgem on RIIO-ED3, RIIO-T3, connection reform and infrastructure investment across the transmission and distribution networks needed to enable AR8-and-beyond offshore wind, CCUS, hydrogen and BESS delivery. It is expected to formalise DESNZ direction on Gate 2 connection reform, Zonal Grid pricing debate, and constraint management funding. This is a critical policy input for NES supply chain planning through 2030.

> **NES Sales Opportunity:** The SPG consultation is a strategic policy engagement window for NES firms with grid, HV substation, connection, cable and hazardous-area electrical scope. Formal responses citing UKCS-adjacent grid capacity needs, ScotWind and Bellrock connection timelines, and pumped storage LDES delivery unlocks are valuable positioning inputs. Coordinate with Scottish Renewables, RenewableUK and Offshore Wind Scotland trade body submissions.

Draft National Policy Statement for fusion energy (EN-8) consultation — closes 17 August (August 2026)

DESNZ's Draft National Policy Statement for fusion energy (EN-8) consultation closes on 17 August 2026 via GOV.UK citizen space. EN-8 is the UK's first dedicated fusion planning framework and supports STEP (Spherical

Tokamak for Energy Production) at West Burton by 2040. Formal responses become part of the evidence base for future fusion planning consent decisions. Read-across for NES supply chain includes tritium handling, cryogenic gas systems, high-purity welding, hazardous-area electrical and QHSE.

DESNZ Reformed National Pricing (RNP) siting reform consultation ongoing (August 2026)
DESNZ's Reformed National Pricing (RNP) siting reform consultation continues to progress. RNP represents the Government's alternative to full Zonal Pricing following the Zonal decision earlier in 2026. RNP proposals will use transmission tariff signals and connection reform to steer generation siting rather than differentiating wholesale electricity prices by zone. For offshore wind and pumped storage supply chain firms, RNP is important because it defines the long-term commercial signal for Scottish-anchored generation versus southern near-load generation.

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
8 Aug 2026	OEUK breakfast — post-AR8 close	Ardoe House Hotel, Aberdeen	Attend if diarised
10 Aug 2026	Jackdaw OPRED consultation closes	DESNZ / OPRED	Submit position statement
10 Aug 2026 – 16 Sep 2026	NESO AR8 qualification assessment window	NESO	Support Tier 1 bid submissions
13 Aug 2026	NSTA UKCS Decommissioning Cost and Performance Update 2026 publishes + industry webinar (10:00 UK)	NSTA / Bureau Veritas / Boskalis Subsea / OEUK	Attend webinar; refresh sales pipeline
13 Aug 2026	Fearna 1,800 MW pumped storage PLI Pre-Enquiry Meeting	Highland Council / Locogen	Attend / register interest
14 Aug 2026	Ofgem LDES cap-and-floor Window 1 minded-to consultation formal response deadline	Ofgem	Submit response
14 Aug 2026	NSTA ACE Programme applications close	NSTA	Confirm submission
17 Aug 2026	Rosebank OPRED consultation closes — Fahnbulleh decision	DESNZ / OPRED	Submit position statement
17 Aug 2026	Fusion Draft NPS EN-8 consultation closes	DESNZ (GOV.UK)	Submit response
18 Aug 2026	Ofgem LDES draft special licence conditions call-for-input closes	Ofgem	Submit response
18–20 Aug 2026	Floating Offshore Wind Conference 2026	P&J Live, Aberdeen	Attend; confirm LOIs with floating developers
19 Aug 2026	DESNZ Strategic Policy Guidance for Electricity Networks Growth response deadline	DESNZ	Submit response
27 Aug 2026	UK plug-in solar becomes legal (SI 2026/848)	UK-wide	Note residential market change
Autumn 2026	Ofgem LDES final cap-and-floor awards	Ofgem	Confirm supply-chain LOIs

Date	Event / Deadline	Location / Body	NES Action
27 Nov 2026 – 17 Feb 2027	AR8 results announcement window	DESNZ / LCCC	Prepare post-award mobilisation
30 Sep 2026	GBE Supply Chain Fund R3 closes; Abandonment Fee Rules commence	GBE / NSTA	Submit R3 application if eligible
1 Oct 2026	VAT off electricity bills (Burnham first policy)	UK-wide	Consumer / commercial impact
28 Oct 2026	Autumn Budget 2026	HM Treasury	Monitor energy tax measures

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	Applications closed 7 Aug 2026; qualification 10 Aug – 16 Sep; 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
GBE Supply Chain Fund Round 3	Great British Energy	Closes 30 Sep 2026	Submit fabrication / manufacturing bids
LDES Cap-and-Floor Window 1	Ofgem	Minded-to responses close 14 Aug; final awards autumn 2026	Position for pumped storage + BESS
LDES draft special licence conditions	Ofgem	Call for input closes 18 Aug 2026	Formal response if delivering LDES contracts
DESNZ Strategic Policy Guidance	DESNZ / Ofgem	Response deadline 19 Aug 2026	Formal industry response
Fusion NPS EN-8	DESNZ (GOV.UK)	Closes 17 Aug 2026	Submit response — tritium/cryogenic supply chain
NSTA ACE Programme	NSTA	Applications close 14 Aug 2026	Late-life / decom innovation
Track 1 / Track 2 CCS supply chain	DESNZ	Track 1 mobilisation live; Track 2 open	Approach Saipem, Eni CCUS, Wood, Petrofac, Worley
NI deep-geothermal consultation	DfE Northern Ireland	Closed 7 Aug 2026	Track policy response later in 2026

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
AR8 CfD qualification (10 Aug – 16 Sep)	Support Tier 1 EPCI bids with confirmed subcontractor LOIs across foundations, cabling, hazardous-area electrical, offshore substation, coatings and marine coordination. Focus on ScottishPower, SSE Renewables, Ocean Winds, Iberdrola, Ossian JV, Vattenfall. Aberdeen developer offices are the priority contacts.	ScottishPower, SSE, Ocean Winds, Iberdrola, Ossian, Vattenfall Aberdeen	★★★★★
LDES Window 1 pumped storage (Coire Glas / Loch Kemp / Earba)	Engage SSE Renewables (Coire Glas, Perth/Aberdeen), Statera Energy (Loch Kemp), Gilkes Energy (Earba) on multi-year framework subcontracting: HV electrical, mechanical fabrication, tunnelling, hydraulic, coatings and welding. 3,900 MW Scottish pumped storage anchor pipeline.	SSE Renewables; Statera Energy; Gilkes Energy	★★★★★
LDES Window 1 lithium-ion BESS (11 projects)	Engage the 11 minded-to Li-ion BESS developers (Statera East Claydon and Sundon, Zenobe, Frontier and others) on HV electrical, hazardous-area systems, civils, structural steel, coatings and QHSE. National footprint but England-anchored.	Statera; Zenobe; Frontier; Modo Energy list	★★★★
Rosebank + Jackdaw consent	Confirm subcontracting Letters of Intent with Adura (Equinor-operated), Ithaca and Shell frameworks; align mobilisation plans to Fahnbulleh decision. Marine, subsea, wells, ROV, coatings and QHSE scope.	Adura (Equinor); Ithaca; Shell UK; OEUK	★★★★★
Squid floating wind wet trial (Ardersier)	Engage Encomara, Aurora Energy Services (Inverness), Haventus (Ardersier) on floating wind supply chain build-out: mooring, dynamic cable, marine coordination, ROV, hazardous-area electrical, coatings. TRL 8 to 9 progression 2026–27.	Encomara; Aurora Energy Services; Haventus (Ardersier)	★★★★★
NSTA UKCS Decommissioning Update webinar (13 Aug)	Attend the 10:00 webinar; refresh 3–5-year decom sales pipeline. Approach Bureau Veritas, Boskalis Subsea, OEUK; align to £44bn remaining scope. NES firms in P&A, topsides, subsea, ROV, coatings, welding, marine coordination.	NSTA; Bureau Veritas; Boskalis Subsea; OEUK	★★★★★
BP UKCS divestment supplier due-diligence	Engage BP Aberdeen procurement, Morgan Stanley and Rothschild advisers, plus likely acquirer bid teams (Ithaca, EnQuest, Serica, Harbour) to secure contract continuity. Multi-year transition through H1 2027.	BP Aberdeen; Morgan Stanley; Rothschild; Ithaca; EnQuest; Serica; Harbour	★★★★★
Santander BESS financings (Econergy + Brockwell)	Engage Fluence (EPC on Inchbean, East Ayrshire), EDF (revenue-floor partner), Brockwell Energy and Econergy on HV electrical, hazardous-area systems, civils, structural steel and QHSE. Two live UK BESS in mobilisation.	Fluence UK; EDF; Brockwell Energy; Econergy	★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
Masdar 205 MW / 540 MWh UK BESS portfolio	Approach Masdar UK, Skyborn/Envision affiliate and preferred EPCs on Rochdale, Cardiff and Chesterfield BESS scope: HV electrical, civils, structural steel, coatings, QHSE. First of £1bn Masdar UK commitment.	Masdar UK; Skyborn/Envision UK	★★★★
Track 1 CCS supply chain (HyNet + NEP)	Approach Saipem Aberdeen and London, Eni CCUS Holding, and Wood/Petrofac/Worley on subsea pipeline, ROV, geotechnical, welding, coatings and marine coordination. Track 1 first CO_2 injection 2028.	Saipem UK; Eni CCUS Holding; Wood; Petrofac; Worley	★★★★
Fearna 1,800 MW PLI Pre-Enquiry Meeting (13 Aug)	Attend or register interest with Locogen ahead of PLI Pre-Enquiry Meeting. HV electrical, tunnelling, hydraulic, mechanical fabrication and coatings.	Locogen (Edinburgh)	★★★★
Floating Wind Conference (18–20 Aug)	Attend P&J Live Aberdeen conference. Pre-book meetings with Aker Solutions, Unitech, Nadara, Green Volt, Cenos, MarramWind, Salamander and Bellrock developers. Follow up Squid demonstration.	Aker Solutions; Nadara; ScotWind developers	★★★★
NSTA ACE Programme (14 Aug)	Submit late-life / decom innovation applications by 14 Aug. Focus on P&A rigless technology, coiled tubing, plug material innovation, corrosion, subsea reuse.	NSTA	★★★★
DESNZ SPG Networks Growth (19 Aug)	Submit formal response citing UKCS-adjacent grid capacity needs, ScotWind connection timelines, LDES pumped storage delivery unlocks. Coordinate with Scottish Renewables, RUK, Offshore Wind Scotland submissions.	DESNZ; Ofgem; Scottish Renewables	★★★
Fusion NPS EN-8 (17 Aug)	Submit formal response as tritium / cryogenic / high-purity welding / hazardous-area electrical supply chain. Establish credentials with UKAEA / STEP West Burton cluster.	DESNZ; UKAEA	★★★
Xodus Northern Endeavour follow-on	Track Xodus (Subsea 7 / Aberdeen) subcontract opportunities across FPSO decom scope. Transferable NES capability development.	Xodus Group Aberdeen; Subsea 7	★★★
NI deep-geothermal (post-consultation)	Pre-position with NI stakeholders (DfE, NI Water, Belfast Council). Drilling, HV electrical, mechanical, welding, coatings and QHSE. Larne and Lough Neagh basins.	DfE NI; NI Water	★★
Ofgem LDES special licence conditions (18 Aug)	Formal response if delivering into LDES contracts — focus on Delivery Plan governance, Back Stop Delay Factor, P90 cost overrun treatment, availability targets.	Ofgem LDES team	★★
Mocean Blue Core floating data centres	Engage Mocean Energy Edinburgh on 2027 demo mobilisation — floating platform, mooring, subsea cabling, marine coordination, commissioning. AI infrastructure adjacency.	Mocean Energy Edinburgh	★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
RNP / siting reform consultation	Track DESNZ Reformed National Pricing (RNP) consultation — sets long-term commercial signal for Scottish-anchored generation versus southern near-load. Grid supply chain read-across.	DESNZ; Ofgem	★★

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