UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 10 October 2026

Coverage Period	Audience	Classification
4 – 10 Oct 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 10 October 2026 were dominated by floating wind and by North Sea politics.

RenewableUK and Scottish Renewables' Floating Offshore Wind 2026 conference (P&J Live, Aberdeen, 7–8 October) took place against a gloomy backdrop. First Minister John Swinney warned there is "no guarantee" Scotland will lead the world in floating wind. Scottish Renewables chief executive Angela Hepworth and SOWEC co-chair Clare Lavelle described the next 12 months as "critical", citing transmission charges, grid dates, slow consents and uncertainty over the UK Strategic Spatial Energy Plan (SSEP). ETZ Ltd chief executive Maggie McGinlay warned that North Sea supply-chain skills could be lost. UK energy ministers did not attend in person. RenewableUK's Energy Pulse report (6 October) put the UK floating pipeline at 28.4 GW but forecast only 274 MW operating in UK waters by the end of 2030. Kincardine's accounts showed a £44.5 million pre-tax loss, and Energy Voice reported speculation that Vårgrønn could exit Green Volt.

There was still concrete floating-wind progress for North-east Scotland. Westhill-based Subsea Micropiles signed to provide site investigation and anchor design for CIP's 100 MW Pentland project (reported 5–6 October). DNV gave Basic Design Certification to BW Ideol's concrete Damping Pool foundation for the near-1 GW Buchan project off Fraserburgh, which plans serial production at Ardersier (7 October). UKRI awarded EMEC £3 million towards the DeepWind national floating-wind test site (5–6 October). GB Energy used the conference to promote market engagement on a UK Major Component Replacement (MCR) hub for tow-to-port floating-turbine repairs. Vestas signed an MoU with Neretek on the BC90 foundation for 60–90 m water depths, which would fall within AR8's new "Other Deepwater Offshore Wind" category (7 October).

On policy, Equinor chief executive Anders Opedal warned on 6 October that refusing Rosebank and Jackdaw would be a "major setback" and could make Equinor rethink UK investment. Kemi Badenoch closed the Conservative conference in Birmingham on 7 October promising to approve both fields and to scrap GB Energy, while Andrew Bowie said signed projects would not be cancelled. Labour held Holborn and St Pancras on 8 October (Sagal Abdi-Wali, 45% to Zack Polanski's 33%). The Jackdaw decision had been held until after this by-election, so it is now the immediate North Sea decision to watch. Elsewhere:

- Eni installed the Douglas CCS platform in Liverpool Bay, the first purpose-built offshore CO2 storage hub for HyNet (8 October).
- Flintshire deferred Enfinium's £200 million Parc Adfer carbon capture plan to allow consultation with communities in England (7–8 October).
- Highland Council raised no objection, on the chair's casting vote, to the 2 GW / 34 GWh Glen Earrach pumped-storage scheme (7 October).
- • RWE completed the sale of its 33.33% Five Estuaries stake to EDF (8 October).
- Seaham's mine-water heat network went live for 750 homes (6 October).

- The NSTA fined CNR £300,000 for Ninian venting breaches; consultation on the Ninian Central topsides decommissioning programme closes 16 October.
- Wood Group offshore workers on five Harbour Energy installations began a 48-hour strike (6 October), with more dates on 20–21 October and 3–4 November.

1. Offshore Wind — Fixed Bottom

RWE completes sale of Five Estuaries stake to EDF (8 October 2026)

RWE completed the transfer of its 33.33% lead-development stake in the consented 1.1 GW Five Estuaries offshore wind farm to EDF power solutions UK and Ireland, which takes over as lead developer alongside Macquarie, ESB and Sumitomo. Five Estuaries, an extension to the operating Galloper array off East Anglia, received development consent on 17 December 2025 for up to 79 turbines with a maximum tip height of 370 m across about 128 km² of the southern North Sea. The partners say the priority is to move from development into construction. RWE will reinvest the proceeds in its consented offshore portfolio, which includes five projects (6.9 GW) awarded in AR7.

> **NES Sales Opportunity:** A change of lead developer usually means the procurement plan is reviewed. EDF's offshore team becomes the key contact for Five Estuaries. NES firms should introduce themselves early for survey, geotechnical, cable-route, marine coordination, and later O&M and inspection scopes. RWE's reinvestment into its AR7 portfolio (Norfolk Vanguard East and West, Dogger Bank South and others) keeps that pipeline busy, so check that your RWE supplier registrations are current.

Glasgow's Airspection completes shore-launched drone inspection at Liverpool Bay (6 October 2026)

Glasgow start-up Airspection completed a 14 km round-trip beyond-visual-line-of-sight (BVLOS) drone flight from shore to an operating offshore wind farm in Liverpool Bay and back, inside the CAA's innovation sandbox, with development support from the Offshore Wind Growth Partnership (OWGP). Airspection estimates up to 50% cost savings against standalone inspection campaigns, about one tonne of CO2e saved per turbine, and up to 25% better site access by reducing vessel trips. CAA says the data will feed into the policy it is developing through its Future of Flight programme.

> **NES Sales Opportunity:** Shore-launched BVLOS inspection threatens some vessel-based inspection campaigns, but it also creates partnering opportunities for NES inspection, data analytics and asset-integrity firms. O&M providers in Montrose, Aberdeen and Wick should test whether drone data can be combined with their blade-repair and rope-access services. OWGP funding supported this project, and OWGP remains a route for NES innovators.

Vestas and Neretek explore BC90 foundations for 60–90 m water depths (7 October 2026)

Vestas signed an MoU with Neretek, a company founded by Wood Thilsted and COP Frontier, to assess pairing Vestas turbines with Neretek's BC90 foundation concept for transitional depths of 60–90 m. Neretek says BC90 combines monopile simplicity with deeper-water installation, can be made with existing supply-chain capability and does not need large specialist vessels. The target is the new "Other Deepwater Offshore Wind" (ODOW) category, which covers sites at least 50 m deep and is eligible for CfD support in AR8.

> **NES Sales Opportunity:** Much of the ScotWind area sits in 60–100 m water. If transitional fixed foundations prove viable there, it would bring back fabrication, pile handling and conventional installation work that floating designs would otherwise send to specialist yards. NES fabricators and engineering consultancies

should follow the ODOW category in AR8 and talk to Neretek and Wood Thilsted about design-for-manufacture and local fabrication.

2. Floating Offshore Wind

Floating Offshore Wind 2026, Aberdeen: “critical” 12 months and warnings on the supply chain (7–8 October 2026)

At the RenewableUK and Scottish Renewables conference in Aberdeen, First Minister John Swinney (attending virtually) warned that there is “no guarantee” Scotland will lead the world in floating wind. He said the UK’s SSEP must reflect Scotland’s full offshore-wind pipeline. Angela Hepworth said projects are struggling to reach FID because of combined uncertainties on technology costs, immature supply chains, Scottish transmission charges, grid dates, planning and routes to market. She called for a transitional fix on transmission charges before AR9. SOWEC co-chair Clare Lavelle said many of these issues had not improved in the past year. AR7 floating projects (Erebus and Pentland) cleared at £155.37/MWh, more than twice fixed-bottom prices. Energy Voice reported that some SSEP options are rumoured to exclude Scottish offshore wind.

ETZ Ltd chief executive Maggie McGinlay warned that delays risk losing 40–50 years of North Sea capability. Examples include Offshore Solutions Group holding back construction of the Moray FLOW-Park wet-storage site until developers confirm demand, and Moor East scaling back its Aberdeen site from 100 jobs to fewer than 40 and changing it to a logistics yard. The Scotsman reported that Scottish Renewables and others aim to give the Treasury a list of viable ScotWind projects paired with ports by the end of the year. It also reported that Sumitomo Electric’s £350 million Nigg subsea cable factory is due to open in the coming week, with output adjusted to market conditions. Encomara’s “Squid” mooring and cable-gathering system, which the company says could cut lifetime floating-wind costs by 10–15%, was presented at the conference.

NES Sales Opportunity: The message from Aberdeen is that floating-wind orders will be fewer and later than ScotWind implied, and they will go to suppliers that are ready when the few viable projects reach FID. Concentrate business development on projects that already hold CfDs or are close to them (Pentland, Erebus, Green Volt) and on the ports list being prepared for the Treasury. Avoid speculative capex unless it is backed by a firm order or GB Energy Supply Chain Fund support. Respond to the SSEP and transmission-charging debate through Scottish Renewables and ETZ, because both will decide how many Scottish projects survive.

Subsea Micropiles to design anchors for 100 MW Pentland (reported 5–6 October 2026)

Westhill-based Subsea Micropiles signed an agreement with Highland Wind Limited, majority-owned by a Copenhagen Infrastructure Partners fund with GB Energy, the National Wealth Fund, the Scottish National Investment Bank, Eurus Energy and Hexicon, to provide site investigation, anchor design, cyclic-loading analysis and offshore installation expertise for the 100 MW Pentland floating wind farm off Caithness. The work will use zonal surveys and Acoustic Zoom volumetric sub-seabed imaging. Pentland won a CfD in AR7 and expects FID in 2027 and operation in 2030. The agreement was signed at the company’s Montrose facility on 28 September, alongside its £5 million-plus expansion there.

NES Sales Opportunity: Pentland is the nearest Scottish floating project to FID, and its anchor and mooring scope has now gone to a North-east firm. Suppliers of geotechnical and geophysical survey vessels, sample testing, mooring hardware, chain and connectors, and marine operations around Caithness should contact both COP (Copenhagen Offshore Partners, the development lead) and Subsea Micropiles. Wick and Scrabster port services are likely to benefit during installation.

DNV certifies Buchan's Damping Pool foundation; Kincardine losses; Green Volt rumours (5–8 October 2026)

Buchan Offshore Wind (BayWa r.e., Elicio and BW Ideol), a project of nearly 1 GW about 75 km north-east of Fraserburgh, received DNV Basic Design Certification for its project-specific concrete Damping Pool floating foundation (7 October). Up to 70 turbines are planned. The offshore consent decision is expected by the end of 2026; Aberdeenshire Council approved the Peterhead onshore works in May, Kent is Owner's Engineer for FEED, and project director Clare Lavelle is targeting FID in 2029. BW Ideol has an exclusivity agreement with Ardersier Energy Transition Facility for serial concrete-foundation production, and the project cites about 2,900 Scottish construction jobs. Separately, accounts for the 50 MW Kincardine floating wind farm show a £44.5 million pre-tax loss with about £40 million set aside for technical faults. Four turbines were refurbished in situ in the first half of 2026, and 2025 revenue fell to £36 million (5 October). Flotation Energy says its 560 MW Green Volt project (AR6 CfD) aims for power by 2030. Energy Voice reported on 8 October that Vårgrønn "couldn't comment" on rumours it will exit Green Volt.

> **NES Sales Opportunity:** A concrete foundation design changes what suppliers are needed. Buchan and Ardersier will want concrete, rebar, formwork, precast, heavy-lift, ballast, quayside civils and marine logistics, much of which Moray Firth and NES civils firms already provide. Register with BW Ideol and Ardersier now. Kincardine's experience shows that in-situ major-component repair is a real O&M market. Treat Green Volt's ownership as uncertain until confirmed, and do not commit capex to its timetable.

EMEC wins £3m for DeepWind; GB Energy seeks views on an MCR hub; RenewableUK Energy Pulse (5–7 October 2026)

UKRI awarded EMEC £3 million over two years from its Infrastructure Fund to take DeepWind, a planned national floating and deepwater wind test site, through engineering, environmental, regulatory and commercial work towards FID and delivery by 2030. The Crown Estate's Supply Chain Accelerator funded earlier feasibility work. At the conference, GB Energy supply-chain director Rob Gilbert promoted a formal market-engagement exercise on a UK Major Component Replacement (MCR) hub for tow-to-port repair of floating turbines, inviting expressions of interest in delivery, operation and finance. RenewableUK's Energy Pulse (6 October) reported global operating floating capacity up 38% to 382 MW (UK 78 MW). The UK pipeline is 28.4 GW, with 592.5 MW holding CfDs, 832 MW across five projects eligible for AR8, and nearly 14 GW in Scotland's offshore planning system. UK operating capacity is forecast at 274 MW by end-2030, 1 GW by 2032 and up to 3 GW by 2034.

> **NES Sales Opportunity:** The MCR hub is a direct opportunity for NES ports, heavy-lift contractors, crane operators and marine engineering firms. GB Energy is asking now who could deliver, operate or fund it, and the expression-of-interest stage is where consortia form. Aberdeen, Cromarty Firth, Ardersier and Montrose should each consider whether to respond. DeepWind will need test-site infrastructure, moorings, cables and monitoring, so Orkney and NES marine suppliers should engage with EMEC.

3. Hydrogen

HEA "State of the Hydrogen Nation": 4,000 jobs on current path versus 17,000 with better policy (8 October 2026)

On World Hydrogen Day the Hydrogen Energy Association (HEA) published its 2026 State of the Hydrogen Nation report. It estimates the UK sector would support about 4,000 direct jobs by 2030 on its current trajectory, against about 17,000 under an improved policy landscape. It names Scotland, North East England and North West England as the three most attractive UK regions for hydrogen investment. HEA chief executive Dr Emma Guthrie called for the policy framework to be delivered, progress through the Hydrogen Allocation Rounds and

long-term direction. Energy Voice ran an 8 October analysis arguing that, after the Hormuz crisis, energy importers are favouring nuclear over hydrogen.

> **NES Sales Opportunity:** This is the second trade-body warning in a fortnight, after Hydrogen UK on 30 September. Until HAR2 winners and the Hydrogen Strategy are published, treat hydrogen as a 2027-plus market. Keep electrolyser balance-of-plant, compression, pipework and safety capabilities current with Scottish developers such as Storegga and the Cromarty Firth projects, and look for the Autumn Budget (28 October) to show whether ministers will act.

ITM Power narrows loss guidance; Scottish haulier deploys hydrogen trucks; Hygen–GeoPura offtake (6–9 October 2026)

ITM Power narrowed its FY2026 adjusted EBITDA loss guidance to £20–21 million, 27% better than earlier guidance and 38% better year on year, with preliminary results due on 19 October 2026 (8 October). Scottish haulier John G Russell (Transport) took delivery at Scania's Eurocentral site of three prototype Scania hydrogen fuel-cell tractor units for daily UK operations. The trucks are part of the ZEHID programme funded by the Department for Transport with Innovate UK (reported 6 October). Hygen Energy signed a hydrogen offtake agreement with GeoPura for its West Yorkshire energy hub (9 October).

> **NES Sales Opportunity:** Early hydrogen demand is coming from transport and mobile power rather than large industrial projects. NES firms in refuelling, compression, mobile storage, vehicle maintenance and gas-safety training should follow the ZEHID trials and Scottish refuelling plans. ITM's 19 October results will show the order book, so listen for UK project names.

4. CCUS

Eni installs Douglas CCS platform in Liverpool Bay for HyNet (8 October 2026)

Eni completed installation of the Douglas CCS platform in Liverpool Bay, described as the world's first purpose-built offshore platform dedicated to CO2 transport and storage for industrial decarbonisation. It will be the offshore hub of the Liverpool Bay transport and storage system serving HyNet (Track 1). The topsides weigh 1,885 tonnes, the jacket 1,755 tonnes and the eight piles 730 tonnes. The platform was delivered in under 18 months from contract award under an integrated EPCI programme. The overall network is about 50% complete and reuses more than 75 miles of existing pipelines, three offshore structures and an onshore treatment plant, plus 21 miles of new pipeline. Phase 1 is expected to store 109 million tonnes of CO2 over its life, starting at 4.5 Mtpa and rising to 10 Mtpa after 2030. Eni cites about 2,000 construction jobs and £2 billion of supply-chain investment.

> **NES Sales Opportunity:** Liverpool Bay shows how fast CCS can move once Track 1 funding is in place, and how much of the work is repurposing oil and gas infrastructure, which is a core NES skill. Next come hook-up, commissioning, pipeline conversion, integrity, monitoring and O&M. NES firms should approach Eni UK and its EPCI contractors now. The same model matters for Acorn and Viking, which still await Track 2 funding decisions; the Autumn Budget on 28 October is the next signal.

Flintshire defers £200m Enfinium Parc Adfer carbon capture decision (7–8 October 2026)

Flintshire County Council's planning committee deferred Enfinium's plan for a carbon capture plant next to the Parc Adfer energy-from-waste facility at Connah's Quay. The plant would capture 241,000 tonnes of CO2 a year and send it through HyNet for storage under the Irish Sea. Officers had recommended approval, but councillors deferred so that cross-border communities (Burton, Shotwick and Puddington) could be consulted after 18 late objections. Natural Resources Wales said there would be no adverse effect on the Dee Estuary. The project is part of the Welsh Government's Carbon Budget Three plan.

NES Sales Opportunity: This is a short delay rather than a refusal. Keep Parc Adfer in the HyNet pipeline with a one- to two-month slip. Energy-from-waste carbon capture is a repeatable market (process piping, compressors, columns, instrumentation and modular skids), and NES process-engineering firms should position for the other UK energy-from-waste sites that will follow.

5. Marine & Tidal

No new UK tidal or wave award this week; EMEC funding relevant to marine test infrastructure (4–10 October 2026)

No new UK tidal-stream or wave contract, consent or funding award from a primary source was published in the 4–10 October 2026 window. The UKRI award of £3 million to EMEC in Orkney (see Section 2) strengthens the centre that also hosts tidal and wave testing. MeyGen (SAE Renewables / Ampeak Energy), Orbital Marine Power, Nova Innovation and the Wave Energy Scotland programme continue their existing work. The next commercial trigger is still the AR8 marine (tidal-stream) ring-fenced result, which industry sources expect between late 2026 and early 2027.

NES Sales Opportunity: Marine energy sales remain tied to AR8. NES firms should keep their capability statements up to date with SAE/Ampeak (MeyGen), Orbital (Westray) and Nova, and with EMEC, whose wider funding base now covers DeepWind. Focus on services that work in both tidal and floating wind: subsea cables, moorings, ROV, marine operations and environmental monitoring.

6. Geothermal

Seaham Garden Village mine-water heat network goes live for 750 homes (6 October 2026)

The Mining Remediation Authority announced that the Seaham Garden Village heat network in County Durham is fully operational. It takes naturally warm water from the Dawdon mine-water treatment scheme and uses heat exchangers and a heat pump to supply heating and hot water to around 750 homes in a 1,500-home development. It is expected to save about 2,600 tonnes of CO2 a year (nearly 65,000 tonnes over 25 years). Partners are Karbon Homes, Esh Construction, Vital Energi and Durham County Council, with Heat Networks Investment Project funding; Vital Community Energi will operate it. The Authority says about 25% of Great Britain’s homes and businesses sit above former coal mines, and it runs more than 80 mine-water treatment schemes, some of which could be adapted for heat.

NES Sales Opportunity: Mine-water and shallow geothermal heat is now a proven, repeatable model with a public owner of the resource. Scotland’s central belt has extensive former coalfields. NES drilling, pump, heat-exchanger, controls and district-heating firms should contact the Mining Remediation Authority’s Heat and By-Product Innovation Team and Scottish local authorities preparing Local Heat and Energy Efficiency Strategies. Oil and gas well and pump skills transfer directly to this work.

7. Decommissioning

NSTA fines CNR £300,000 over Ninian venting; Ninian Central topsides consultation closes 16 October (7 October 2026)

The North Sea Transition Authority fined CNR International £300,000 for exceeding its 2024 Ninian venting consent by 20.9 tonnes. This was CNR’s third breach at the same location, following a £250,000 fine earlier in 2026, and the NSTA said its internal processes had been ineffective. CNR, which called the fine disproportionate,

has already started decommissioning the Ninian fields. The Ninian Southern topsides programme was approved in February 2026, and consultation on the draft programme for the Ninian Central topsides closes on 16 October 2026. Separately, the Telegraph reported (9 October) that Centrica says the Rough gas storage facility is scheduled for decommissioning next April, after delays over extending its life.

> **NES Sales Opportunity:** Ninian Central is one of the larger topsides removals in the northern North Sea. Once the programme is approved, expect contracts for engineering-down-and-clean, topsides preparation, waste management, onshore dismantling and monitoring. NES decommissioning firms should check the draft programme before 16 October and contact CNR's decommissioning team. Rough would be a large Southern North Sea project if next April's date holds, but a government rescue is still possible.

Decom Mission and FINDES launch Brazil challenge portal; North Sea service awards (6–8 October 2026)

Decom Mission and FINDES, the industry federation of Espírito Santo, launched a digital Challenge Portal linking Brazilian decommissioning projects with UK and North Sea expertise. Espírito Santo has 26 ANP-approved decommissioning projects with nearly R$5 billion of planned investment (7 October). In the UK North Sea, Aberdeen-based TWMA won a multi-million-dollar drilling-waste contract for a multi-well campaign. Its RotoMill units will process about 2,000 tonnes of cuttings per well offshore, with operations starting in Q4 2026 (6 October). Drilling Tools International agreed to buy Aberdeen's Saltire Energy and Foxley Energy for $80 million in cash plus stock (8 October).

> **NES Sales Opportunity:** The Brazil portal is an export route for NES decommissioning specialists while UK volumes depend on approvals. Register capabilities through Decom Mission. Buyers continue to acquire Aberdeen service firms, which keeps valuations up but can change procurement relationships. Check whether your key customers or competitors are affected.

8. Hydropower & Pumped Storage

Highland Council raises no objection to 2 GW Glen Earrach pumped storage (7 October 2026)

Highland Council's south planning applications committee voted, on chair Paul Oldham's casting vote, to raise no objection to the Glen Earrach Pumped Storage Hydro scheme. Conditions include daytime-only rock blasting and a dam wall that blends into the landscape. The 2 GW / 34 GWh scheme would use Loch nam Breac Dearga above Drumnadrochit as its upper reservoir and Loch Ness as the lower reservoir, with a head of about 480 m. Construction would take eight years, with up to 178 lorry movements on peak days, barges removing excavated rock, and a camp for 1,000 workers. Scottish Ministers will decide the Section 36 application. The Ness District Salmon Fishery Board continues to warn of irreversible ecological damage. SSE also marked 70 years of Invergarry power station (8 October).

> **NES Sales Opportunity:** Glen Earrach is now with Scottish Ministers and, with Coire Glas, Loch Kemp and Earba, forms a Highland pumped-storage pipeline above 5 GW that depends on Ofgem's long-duration storage (LDES) cap-and-floor decisions. A 1,000-person construction camp means big contracts for camp services, catering, transport, civils, tunnelling, M&E and HV. NES firms should approach Glen Earrach Energy about early contractor and supplier engagement, and plan for a decision in 2027.

9. Policy

Equinor warns on Rosebank and Jackdaw; Conservatives pledge approval; Labour holds Holborn (6–9 October 2026)

Equinor chief executive Anders Opedal said on 6 October that refusing Rosebank and Jackdaw would be a “major setback” for its Adura joint venture with Shell and would make Equinor take “a hard view” of future UK investment. Adura says Jackdaw is 99% built and could deliver gas this winter if approved soon. Energy Secretary Miatta Fahnbulleh holds the final decision, and the Telegraph reported that the Jackdaw decision had been held until after the Holborn by-election. At the Conservative conference in Birmingham, Kemi Badenoch promised in her closing speech (7 October) to approve both fields. Shadow Energy Secretary Andrew Bowie confirmed plans to axe GB Energy but said signed contracts and GBE-Nuclear projects such as Wylfa would not be cancelled. Aberdeen South MP Douglas Lumsden said 1,000 industry jobs are being lost each month. On 8 October Labour’s Sagal Abdi-Wali won Holborn and St Pancras with 45%, against 33% for Green leader Zack Polanski.

> **NES Sales Opportunity:** With the by-election over, a Jackdaw decision could come within weeks, and the Budget on 28 October is the next set-piece moment. If Jackdaw is approved, the near-term work is hook-up, commissioning and start-up support rather than new construction. Rosebank would bring a much larger subsea, FPSO and drilling programme. Conservative pledges matter only beyond the next general election, but the GB Energy “cull” line adds political risk to multi-year GBE-funded programmes. Draw down grants promptly where you can.

Grid connections slip to 31 October; NESO margin notice; gas winter warning; North Sea strikes (2–9 October 2026)

Ofgem consented on 2 October to NESO’s second extension of the Gate 2 Phase 1 connection-offer deadline, from 30 September to 31 October 2026, affecting around 62 offers. Osborne Clarke (8 October) set out how Great British Grid will sit inside GB Energy alongside Ofgem and NESO, with start-up costs from GBE’s existing budget. NESO issued an Electricity Margin Notice for the evening peak of 6 October, with a forecast shortfall of about 1.88 GW as wind output fell to around a quarter of its 2026 average. An ENTSOG report (reported 9 October) warned that a cold snap could empty UK gas storage this winter, and Cornwall Insight expects bills to rise about 16% from January. Unite and RMT members employed by Wood Group began a 48-hour strike on 6 October on Harbour Energy’s Britannia, Jasmine, Judy, Lomond and North Everest installations, with further strikes on 20–21 October and 3–4 November. Unite also has a strike mandate from 160 Apache workers on Forties and Beryl assets (5 October).

> **NES Sales Opportunity:** Grid-connection delays push back onshore substation and cable work for wind and storage projects that NES firms serve. Developers will confirm firm dates only after 31 October. Supply-security warnings strengthen the case in the Budget for both Jackdaw and long-duration storage. Offshore labour disputes can delay campaign work on affected Harbour and Apache assets, so build schedule buffers into October–November mobilisations and keep commercial contacts open.

10. Key Upcoming Events for NES Companies

Date	Event	Location	NES Relevance
Week of 12 Oct 2026	Sumitomo Electric £350m subsea cable factory due to open	Nigg, Cromarty Firth	HVAC/HVDC cable supply chain
15–16 Oct 2026	Offshore Wind North East Conference	Newcastle	NES cross-border engagement
16 Oct 2026	NSTA consultation closes: Ninian Central topsides decommissioning programme (CNR)	Northern North Sea	Topsides removal scopes
19 Oct 2026	ITM Power preliminary results	London (AIM)	Electrolyser order book

Date	Event	Location	NES Relevance
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
28 Oct 2026	Autumn Budget 2026	Westminster	EPL, CCUS Track 2, hydrogen, GB Grid
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
Late Nov 2026	AR8 CfD Contract Budget Notice (DESNZ)	National	Pot budgets incl. floating and ODOW
10 Dec 2026	GB Energy Supply Chain Fund: final application close	National	Manufacturing capex grants
End 2026	Buchan offshore consent decision (Scottish Ministers)	Off Fraserburgh	Concrete floating foundations
Late 2026 – Q1 2027	AR8 results (incl. floating pot and tidal ring-fence)	National	Floating and marine order triggers
2027	Pentland and Berwick Bank B final investment decisions	Caithness / Montrose	Construction and O&M

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; new component-suggestion route	Closes 10 Dec 2026 (or earlier)	Jackets, gearboxes, generators, converters, HV kit
GB Energy MCR Hub market engagement	Expressions of interest: delivery, operation, finance	Open now	Ports, heavy lift, floating O&M
UKRI Infrastructure Fund (DeepWind award)	£3m to EMEC over two years	Awarded	Test-site infrastructure, moorings, monitoring
Scottish Government Offshore Wind Investment Programme	£500m; £141m committed to date	Rolling to 2028/29	Ports and manufacturing via SE, HIE, SNIB
Scottish National Investment Bank	e.g. £2.5m MiAlgae, Grangemouth (6 Oct)	Rolling	Growth capital for Scottish manufacturing

Mechanism	Amount / Scope	Deadline	Relevance to NES
Offshore Wind Growth Partnership (OWGP)	Innovation and growth grants (e.g. Airspection)	Rolling	Technology development and demonstration
Heat Networks Investment Project / successor schemes	Capital for heat networks (e.g. Seaham)	Rolling	Mine-water and geothermal heat
ZEHID (DfT / Innovate UK)	Zero-emission HGV demonstrator funding	Programme live	Hydrogen refuelling and fleet services
HAR2 electrolytic hydrogen (DESNZ)	Shortlist awaiting decision	Pending	Electrolyser balance-of-plant
CCUS Track 1 / Track 2	HyNet and East Coast in delivery; Acorn and Viking pending	Budget 28 Oct signal	Repurposing, integrity, O&M
Ofgem LDES Cap-and-Floor Window 1	Pumped storage and long-duration projects	Autumn 2026 decisions	Glen Earrach, Coire Glas, Loch Kemp, Earba

12. Sales Opportunity Summary for NES Supply Chain Companies

Opportunity	Details	Rating	Action Window
Pentland floating wind (100 MW)	AR7 CfD, FID 2027, operation 2030. Subsea Micropiles on anchors. Survey, moorings, marine ops, Caithness ports.	★★★★★	Now to FID 2027
GB Energy Supply Chain Fund	£300m capex grants, 29 components. Allocated in rounds; new route to propose components.	★★★★★	Apply early, by 10 Dec
GB Energy MCR hub (floating O&M)	Market engagement on tow-to-port major component repair base. Ports, heavy lift, cranes, marine engineering.	★★★★★	Respond now
Buchan / Ardersier concrete foundations	DNV design certification; consent decision end 2026; FID 2029. Concrete, rebar, precast, quay civils, logistics.	★★★★	Register now
Liverpool Bay CCS (Eni, HyNet)	Douglas platform installed; network ~50% complete. Hook-up, commissioning, pipeline conversion, integrity, O&M.	★★★★	Q4 2026 – 2027
Five Estuaries (EDF lead)	1.1 GW consented; new lead developer reviewing route to construction. Survey, cable route, marine coordination.	★★★★	Introduce now
Ninian Central topsides decommissioning	CNR draft programme out to consultation until 16 Oct. EDC, topsides prep, waste, onshore dismantling.	★★★★	Before and after 16 Oct
Glen Earrach 2 GW pumped storage	No objection from Highland Council; Scottish Ministers decide. Camp for 1,000 workers, civils, tunnelling, M&E.	★★★★	Early engagement

Opportunity	Details	Rating	Action Window
DeepWind test site (EMEC)	£3m UKRI award for development to FID; delivery by 2030. Infrastructure, moorings, cables, monitoring.	★★★	2027 – 2030
ODOW transitional foundations (BC90)	Vestas–Neretek MoU for 60–90 m depths; AR8 ODOW category. Fabrication, piling, installation.	★★★	Track AR8
Mine-water / shallow geothermal heat	Seaham live for 750 homes; 80+ mine-water schemes could be adapted. Drilling, pumps, heat exchangers.	★★★	Rolling
Jackdaw (Adura)	Decision expected after by-election; 99% built. Hook-up, commissioning, start-up support.	★★★	Weeks
Decom Mission Brazil portal	26 ANP-approved projects in Espírito Santo (~R$5bn). Export route for UK decommissioning specialists.	★★★	Register now
Enfinium Parc Adfer CCS	£200m, 241,000 t CO2/yr; deferred for cross-border consultation. Process piping, compression, skids.	★★★	After re-hearing
Hydrogen mobility (ZEHID, Hygen)	Fuel-cell HGV trials in Scotland; West Yorkshire offtake. Refuelling, compression, maintenance.	★★	2027
Tidal and wave (AR8 ring-fence)	No new awards this week. SAE/Ampeak (MeyGen), Orbital, Nova, EMEC, Wave Energy Scotland.	★★	After AR8 results

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