UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 1 August 2026

Coverage Period	Audience	Classification
26 July – 1 August 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 1 August 2026 delivered a defining moment for the UK North Sea supply chain. On Thursday 31 July, BP put its entire UK North Sea oil and gas business up for sale, ending sixty years of upstream production. The sale process launched under Murray Auchincloss covers all operated fields, non-operated interests, decommissioning liabilities and the associated Aberdeen workforce. Advisers Morgan Stanley and Rothschild have been retained. The move creates the largest single reshaping of the UK Continental Shelf ownership map in a generation and puts hundreds of NES Tier 2/3 supplier contracts into review. Alongside, Well-Safe Solutions was awarded full Well Operatorship for a confidential UK client on 30 July — expanding beyond decommissioning into operating status, a signal of consolidation in the late-life operator segment. Petrofac secured extensions with Ithaca Energy and ONEgas West (Shell/ExxonMobil), and Perenco started Southern North Sea decommissioning at Galahad and Amethyst using the Petrodec Obana.

Political pressure on the Rosebank and Jackdaw consents intensified. Prime Minister Andy Burnham, speaking on 30–31 July, signalled a “pragmatic” position on new North Sea drilling, prompting warnings of the first potential Labour revolt of his premiership from climate-aligned MPs. The Jackdaw OPRED public consultation closes 10 August; Rosebank closes 17 August. Miatta Fahnbulleh will deliver both decisions from DESNZ.

On CCUS, HyNet accelerated: the Crown Estate signed the Liverpool Bay CO_2 storage seabed lease with Eni CCUS Holding on 29 July — unlocking 109 Mt of storage, an anticipated £2bn of supply-chain investment and 2,000 jobs, with first CO_2 injection targeted for 2028. The Northern Endurance Partnership began offshore construction at Hartlepool on 27 July, with Saipem mobilising the 149 km 28-inch subsea pipeline and £2bn already awarded to more than 260 UK companies. NSTA published two CO_2 pipeline design studies on 30 July — Penspen (new-build) and DNV (repurposing existing infrastructure) — which will feed directly into the 2nd Offshore CO_2 Storage Licensing Round.

For pumped storage, GE Vernova was selected on 28 July by Engie and La Caisse’s First Hydro Company to modernise two of six units at the 1,728 MW Dinorwig plant in Wales, extending asset life by 25 years — a rare commercial pumped hydro upgrade in the UK with immediate implications for control, mechanical and electrical suppliers.

Cierco Energy signed an Agreement for Lease with the Crown Estate on 31 July for the Llŷr Wind Celtic Sea test-and-demonstration project (2 × 100 MW off Pembrokeshire). Aker Solutions (Entr) and Unitech Power Systems were awarded the electrical infrastructure contract for the 1.8 GW Bellrock floating wind farm on 29 July. Fidra Energy reached financial close on 500 MW / 1.1 GWh West Burton C BESS with CMS advising — the largest UK BESS financial close of Q3.

The next fortnight is now the busiest single commercial gate of 2026: AR8 applications close 7 August, the Jackdaw consent closes 10 August, the Fearna 1,800 MW pumped storage PLI Pre-Enquiry Meeting is 13 August, NSTA ACE Programme applications close 14 August, and the Rosebank decision closes 17 August.

NES firms should confirm subcontracting Letters of Intent with Tier 1 EPCIs bidding into AR8, engage BP's divestment advisers on transition contract continuity, target Well-Safe Solutions on Well Operatorship subcontracts, and register interest with GE Vernova on Dinorwig modernisation packages.

1. Offshore Wind — Fixed Bottom

Crown Estate reopens accelerated tender for 1.5 GW Morgan Irish Sea project (24–27 July 2026)

The Crown Estate reopened the accelerated tender for the 1.5 GW Morgan project in the Irish Sea, following the withdrawal of the previous developer. A new developer is targeted to be selected by end 2026. Morgan is one of three Round 4 Irish Sea sister projects. The accelerated tender is a rare fast-track route into a consented seabed lease and creates an unusual commercial window in what would ordinarily be a multi-year process.

> **NES Sales Opportunity:** The 1.5 GW Morgan tender is a fast-track opportunity for NES firms to position with an incoming developer before Tier 1 EPCIs are locked in. Fabricators, cable installers, foundation designers and marine coordination providers should approach the Crown Estate's tender team and engage likely bidders across UK developers, European utilities and IPPs on early Letters of Intent.

Aker Solutions Entr and Unitech Power Systems awarded 1.8 GW Bellrock electrical infrastructure contract (29 July 2026)

Nadara awarded the Bellrock floating offshore wind farm electrical infrastructure concept contract to Aker Solutions (Entr) and Unitech Power Systems. The 1.8 GW project sits approximately 120 km east of Stonehaven off the Aberdeenshire coast. The concept scope covers transmission configurations, offshore substations, inter-array and export cabling, onshore grid connection, cost, schedule and supply-chain analysis. Construction start is anticipated in 2031, subject to consent and CfD success. This follows the XOCEAN geophysical survey which began on 26 July along the potential export cable corridor.

> **NES Sales Opportunity:** Bellrock adds a firm 1.8 GW pipeline to the north-east Scotland floating cluster. NES firms in dynamic cable, mooring, hazardous-area electrical, offshore substation topsides, and floating foundation fabrication should engage Aker Solutions Aberdeen, Unitech Power Systems and Nadara now to secure early supply-chain positions for the 2028–31 pre-construction cycle.

Seatrium ORS breaks ground on Lowestoft O&M hub (27 July 2026)

Seatrium ORS (Offshore Renewables Services) broke ground on 27 July on its new operations and maintenance hub at the Port of Lowestoft. The facility will serve as an east-coast base for offshore wind service operations, expanding Seatrium's presence in the UK offshore wind O&M supply chain. Construction is targeted for completion in 2027.

> **NES Sales Opportunity:** The Lowestoft hub creates cross-fleet O&M opportunities for NES firms with transferable service experience from the North Sea oil and gas basin. Marine coordination, hazardous-area electrical, high-integrity welding, coatings, NDT and QHSE providers should engage Seatrium ORS on Tier 2/3 subcontracting slots and consider mirroring service capability with a NES base for the Scottish east-coast fleet.

ScotWind supply chain: Scottish share drops from 36% to 29% (Herald analysis, July 2026)

Herald analysis of ScotWind Supply Chain Development Statement updates showed the projected Scottish spend share falling from 36% to 29% — approximately £6bn less committed spend within Scotland, with the shift moving to overseas suppliers. The change reflects revised procurement strategies from ScotWind developers as final project scopes and Tier 1 supplier decisions consolidate. Individual developers have not been named in the aggregate reporting.

> **NES Sales Opportunity:** The 7-percentage-point drop in Scottish content is a direct call to action. NES Tier 2/3 firms should engage Scottish Enterprise, Offshore Wind Growth Partnership (OWGP), Scottish Government Supply Chain Development team and directly with ScotWind developer procurement offices on missed-slot subcontracting opportunities. Firms with existing manufacturing and fabrication footprints in Scotland are best positioned to argue for scope reinstatement.

Dogger Bank South East and West DML variations issued by MMO (29 July 2026)

The Marine Management Organisation issued Deemed Marine Licence variations for the Dogger Bank South East and Dogger Bank South West offshore wind farms on 29 July, publishing the amended conditions on GOV.UK. The variations relate to construction phasing and environmental monitoring requirements, aligning with the current project programme. Dogger Bank South East and West together add capacity to the wider Dogger Bank complex — already the world's largest offshore wind development.

ScottishPower awards £102.9m onshore wind O&M contracts across 24 UK sites (28 July 2026)

ScottishPower awarded onshore wind O&M contracts totalling £102.9m covering 24 wind farms across the UK. The contract packages cover long-term turbine maintenance, blade repair, gearbox and generator servicing, condition monitoring and site management. Individual contract winners include a mix of OEM service divisions and independent service providers. The awards support ScottishPower's wider commitment to £50bn UK network and generation investment through 2030.

Greencoat UK Wind H1 2026 results — generation up 4.9% to 3,003 GWh (30 July 2026)

Greencoat UK Wind reported half-year results showing electricity generation of 3,003 GWh, up 4.9% on H1 2025. NAV per share and dividend commitments were reaffirmed. The performance reflects strong offshore and onshore fleet availability and above-average wind speeds across Q2. Greencoat is one of the UK's largest listed pure-play wind investors.

2. Floating Offshore Wind

Cierco Energy signs Agreement for Lease for Llŷr Wind Celtic Sea test-and-demonstration (31 July 2026)

Cierco Energy signed an Agreement for Lease with the Crown Estate on 31 July for the Llŷr Wind project — a Celtic Sea floating offshore wind test-and-demonstration site of 2 × 100 MW off Pembrokeshire. The AfL is a key milestone toward FID and construction and represents one of the first commercial-scale Celtic Sea floating projects to reach seabed lease. Cierco is a Welsh-headquartered developer.

> **NES Sales Opportunity:** Llŷr Wind gives NES floating supply-chain firms an early foothold in the Celtic Sea cluster — which will be the primary UK floating-wind market from the late 2020s. Firms in mooring, dynamic cabling, floating foundation fabrication and marine coordination should engage Cierco Energy directly. Pembrokeshire port supply-chain positioning is also relevant.

Bellrock 1.8 GW electrical infrastructure contract awarded (see Section 1)

Aker Solutions (Entr) and Unitech Power Systems were awarded the Bellrock electrical infrastructure concept contract on 29 July — see Section 1 for full detail. Bellrock is one of the largest floating offshore wind projects currently in UK development, alongside Green Volt, Cenos, MarramWind, Salamander and the floating portion of Caledonia South.

Encomara receives ABS Design Approval for floating wind installation technology (July 2026)

Encomara received Design Approval from ABS (American Bureau of Shipping) for its floating offshore wind installation technology. Class approval is a prerequisite for commercial deployment on UK Celtic Sea and Scottish floating projects. Encomara is a UK-based marine engineering firm developing patented installation aids for floating turbine foundations.

3. Hydrogen

Ramboll Owner's Engineer detail confirmed for 30 MW Barrow Green Hydrogen (27 July 2026)

Ramboll confirmed further detail on its Owner's Engineer role for the 30 MW Barrow Green Hydrogen project, following its appointment earlier in July. The project uses PEM electrolysis technology and is developed by a consortium of GHECO, Carlton and Schroders. Output will displace approximately 50% of Kimberly Clark's natural gas use at the Barrow site, delivering emissions reductions of around 18,300 tonnes CO_2 per year. Barrow Green Hydrogen is expected to be the first HAR1 project to reach Final Investment Decision.

> **NES Sales Opportunity:** Barrow Green Hydrogen enters the FEED-to-execution transition. NES firms in high-integrity pipeline welding, hazardous-area electrical, coatings, NDT and PEM electrolyser mechanical installation should approach Ramboll and the GHECO/Carlton/Schroders consortium on subcontracting slots for Q4 2026 mobilisation.

UK ZEF Programme awards £7.3m to eight zero-emission flight projects (23 July 2026)

The UK Zero Emission Flight programme awarded £7.3m to eight projects on 23 July. Recipients include ZeroAvia HyPRIME (£2.12m), Vertical ECLiPSE (£1.75m), Bristow SEAN (£1.52m), Badgerworks CHOSAN (£1.15m), Urban Foresight SATE H2 Roadmap (£190k), SYSELEK SPARC-AIR (£197k), Sky-Zero (£174k), and Equilibrion (£93k). The projects target airport hydrogen infrastructure rather than aircraft — refuelling logistics, cryogenic storage, safety systems and hazardous-area electrical.

> **NES Sales Opportunity:** The ZEF airport-infrastructure focus is a direct read-across for NES firms with hazardous-area electrical, cryogenic experience, high-purity welding and QHSE. Bristow (Aberdeen), ZeroAvia and Urban Foresight are natural first-contact points. NES firms should also engage Aberdeen International Airport and Prestwick on early hydrogen trials.

Ballard Power Systems agrees to acquire GeoPura for £275m (28 July 2026)

Canadian fuel cell manufacturer Ballard Power Systems announced its agreement to acquire UK hydrogen power company GeoPura for £275m. GeoPura operates a fleet of Hydrogen Power Units (HPUs) delivering off-grid clean power for construction, events, film and infrastructure sites across the UK. The acquisition creates a vertically integrated hydrogen fuel-cell and power-delivery business with a UK operational base. Completion is subject to customary regulatory approvals.

GeoPura and National Highways Lower Thames Crossing 2,500 tonne H_2 deal (28 July 2026)

GeoPura signed a deal with National Highways for the Lower Thames Crossing project covering approximately 2,500 tonnes of green hydrogen supply, enabling carbon-neutral construction plant. The deal is one of the largest single hydrogen supply contracts to a UK infrastructure project and validates GeoPura's HPU model at major project scale.

Sullom Voe clean fuels hub: Scottish Government commits £760k to Veri Energy (28 July 2026)

The Scottish Government committed £760k to Veri Energy to advance the Sullom Voe clean fuels hub concept. Veri Energy — the EnQuest-owned energy transition subsidiary — is developing a clean fuels production and export hub at Sullom Voe on Shetland, leveraging existing tanker jetty and storage infrastructure. The funding supports pre-FEED engineering for hydrogen and ammonia production and export logistics.

> **NES Sales Opportunity:** Sullom Voe as a clean fuels hub is a strategic Scottish opportunity for NES firms. Veri Energy (Aberdeen-headquartered via EnQuest) is directly reachable. Firms in high-integrity welding, cryogenic storage, ammonia handling QHSE, hazardous-area electrical and jetty upgrades should engage Veri Energy on pre-FEED subcontracting.

Chesterfield Special Cylinders CEO steps down citing hydrogen market delays (28 July 2026)

Chesterfield Special Cylinders Holdings plc announced its CEO is stepping down, citing sustained delays in the hydrogen market causing project timelines and revenue plans to slip. The company reconfirmed its FY26 outlook. The disclosure reflects wider sector concerns about pace of HAR1 project delivery and downstream H_2 demand ramp.

Durham University: North Sea depleted fields could store 3,659 TWh of hydrogen (July 2026)

A Durham University study published in July estimated that depleted North Sea gas fields could provide up to 3,659 TWh of hydrogen storage capacity — sufficient to store several years of projected UK hydrogen demand. The study strengthens the case for large-scale subsurface H_2 storage as part of UK energy security.

4. CCUS

Liverpool Bay CCS seabed lease signed — HyNet unlocks 109 Mt storage (29 July 2026)

The Crown Estate signed the Liverpool Bay CO_2 storage seabed lease with Eni CCUS Holding on 29 July, clearing the way for the Liverpool Bay CCS project as part of the wider HyNet North West cluster. The scheme unlocks 109 million tonnes of CO_2 storage in depleted gas fields under the East Irish Sea, an anticipated £2bn of supply-chain investment and around 2,000 jobs. First CO_2 injection is targeted for 2028. Eni CCUS Holding is the JV vehicle for HyNet CO_2 transportation and storage; associated financing has now exceeded £500m from 13 lenders.

> **NES Sales Opportunity:** The Liverpool Bay lease triggers procurement mobilisation for offshore pipeline installation, subsea tie-ins, high-integrity welding, ROV support, geotechnical and marine coordination. NES firms should approach Eni CCUS Holding, Saipem, and Wood/Petrofac/Worley (as expected Tier 1 EPCIs) on second-tier contracting. Aberdeen firms bring directly transferable subsea gas-field decommissioning credentials.

Northern Endurance Partnership: offshore construction started at Hartlepool (27 July 2026)

The Northern Endurance Partnership (BP, Equinor, TotalEnergies) started offshore construction at Hartlepool on 27 July with Saipem mobilising for the 149 km 28-inch subsea CO_2 pipeline. Over £2bn has already been awarded to more than 260 UK companies for NEP. The pipeline will connect the East Coast Cluster capture sites to offshore storage in the Endurance saline aquifer, with total planned storage capacity of up to 1 billion tonnes of CO_2.

> **NES Sales Opportunity:** The NEP pipeline mobilisation is now live. NES firms in subsea installation, ROV operations, geotechnical, marine coordination, coatings, welding and vessel support should approach Saipem's Aberdeen and London offices on second-tier scope. Hartlepool proximity favours firms with north-east England and NES cross-basin service capability.

NSTA publishes Penspen and DNV CO_2 pipeline studies (30 July 2026)

The North Sea Transition Authority published two commissioned CO_2 pipeline studies on 30 July: Penspen assessed new-build CO_2 pipeline design and specification requirements; DNV assessed the technical case for repurposing existing hydrocarbon pipelines for CO_2 service. The studies feed directly into industry planning for the 2nd Offshore CO_2 Storage Licensing Round and future Track 2 cluster infrastructure. Both reports are open access via NSTA.

Belgium–UK CCS memorandum under London Protocol (July 2026)

Belgium and the UK signed a memorandum of understanding on cross-border CO_2 transport under the London Protocol — following the London Protocol amendments enabling international CO_2 movement for permanent storage. The MoU opens a legal path for Belgian CO_2 imports to UK storage sites and complements existing UK bilateral arrangements with the Netherlands and Norway.

Peak Cluster raises £59m for Peak Cluster CCS (July 2026)

Peak Cluster confirmed it has raised £59m (£31m private + £28m Government) for the Peak Cluster CCS scheme. Separately, Storegga's exit from its 30% Acorn CCS stake continues, with the SEET consortium (Shell, BP, Harbour, TotalEnergies) reviewing options.

Eni CCUS Holding financing exceeds £500m from 13 lenders (July 2026)

Eni CCUS Holding — the JV vehicle for HyNet CO_2 transportation and storage — confirmed its financing package has exceeded £500m from 13 lenders, one of the largest single financings of a UK CCS scheme to date. Financing supports project procurement mobilisation across the Liverpool Bay CCS lease.

5. Marine & Tidal

Mocean Energy raises £5m for Blue Core floating data centres (28 July 2026)

Edinburgh-headquartered Mocean Energy raised £5m to develop its Blue Core floating data centre concept, which combines Mocean's wave energy converter technology with solar generation to power offshore data centres. The company is targeting 6 GW of offshore floating data centre capacity by 2040. Blue Core aims to address the intersection of AI infrastructure demand and offshore renewable co-location. The funding will support demonstration deployments off the west coast of Scotland.

> **NES Sales Opportunity:** Blue Core opens a new adjacent market for NES firms in floating platform fabrication, mooring, subsea cabling, marine coordination and offshore commissioning — with wave, solar and data-centre integration all in one. Mocean Energy Edinburgh is directly reachable; firms should engage on 2027 demonstration mobilisation.

CorPower Ocean secures DNV wave energy certification (21 July 2026)

CorPower Ocean received DNV certification for its C4 Wave Energy Converter (WEC) technology. Certification is a critical commercial gate for wave energy technology and supports future EMEC (European Marine Energy Centre) Orkney deployments and Celtic Sea commercial-scale wave arrays.

6. Geothermal

Lewisham Hospital ground source heat pump project awaits final go-ahead (27 July 2026)

The £25m Lewisham Hospital ground source heat pump project — backed by £18m from DESNZ — awaits final decision as test-phase results are reviewed. The scheme is one of the largest urban ground source heat pump installations in the UK NHS estate. River protection groups have raised concerns about local watercourse impact; the final decision is imminent. The project would displace substantial gas boiler load at the hospital site.

> **NES Sales Opportunity:** While UK geothermal news was thin this week, the Lewisham GSHP project signals a widening NHS estate market for large-scale ground source and low-carbon heat. NES firms in HVAC, mechanical and electrical, high-purity welding and hazardous-area systems with public-sector heat scheme experience should engage NHS estates trusts and DESNZ heat network teams.

7. Decommissioning

BP puts entire UK North Sea business up for sale (31 July 2026)

BP announced on 31 July that it is placing its entire UK North Sea oil and gas business up for sale, ending sixty years of continuous North Sea upstream production. The scope includes all operated fields, non-operated interests, decommissioning liabilities and the Aberdeen workforce. Morgan Stanley and Rothschild have been retained as advisers. The sale is part of BP's wider strategic overhaul under CEO Murray Auchincloss. Bidders are expected to include Ithaca Energy, EnQuest, Serica, Harbour Energy and international private equity vehicles. Timeline is expected to run through H2 2026 into H1 2027.

> **NES Sales Opportunity:** The BP UKCS sale is the single largest supply-chain disruption of 2026 for the NES basin. Hundreds of Tier 2/3 supplier contracts — marine services, subsea, wells, well plugging & abandonment, decommissioning, ROV, geotechnical, coatings, NDT, QHSE — enter due-diligence and transition review. NES firms should immediately engage BP's Aberdeen procurement, likely acquirer bid teams (Ithaca, EnQuest, Serica, Harbour) and the divestment advisers (Morgan Stanley, Rothschild) to secure contract continuity and position for new operator scopes. Well-Safe Solutions, Petrofac and Well Operatorship providers are direct beneficiaries.

Well-Safe Solutions awarded full Well Operatorship (30 July 2026)

Well-Safe Solutions announced on 30 July that it has been awarded full Well Operatorship for a confidential UK client — an expansion beyond decommissioning-only into operator status. The award positions Well-Safe as an integrated late-life field manager, extending its addressable market across UK Continental Shelf operations. Well-Safe operates the Well-Safe Guardian and Well-Safe Protector semi-submersibles from Aberdeen.

> **NES Sales Opportunity:** Well-Safe's move into full Well Operatorship signals consolidation in the late-life operator market and creates fresh subcontracting requirements. NES firms in wells services, drilling support, subsea, ROV, marine coordination and QHSE should engage Well-Safe Solutions on subcontracting slots. Aberdeen firms with rig-support credentials are best placed.

Petrofac contract extensions with Ithaca Energy and ONEgas West (July 2026)

Petrofac secured contract extensions with Ithaca Energy and ONEgas West (a joint operatorship of Shell and ExxonMobil). Scopes cover integrated services across production, maintenance, engineering and decommissioning support. The extensions signal ongoing operator confidence in Petrofac's UK late-life field service capability, consistent with the wider UKCS trend of established asset extensions.

Perenco UK starts Southern North Sea decommissioning campaign at Galahad and Amethyst (July 2026)

Perenco UK has started the Southern North Sea decommissioning campaign at the Galahad and Amethyst fields. Petrodec's Obana platform-removal vessel is mobilising to Galahad first, followed by Amethyst. The campaign covers topsides removal, jacket removal and subsea infrastructure decommissioning. Petrofac Facilities Management (Aberdeen) supports the campaign.

DeepOcean BP Foinaven West of Shetland continues (June–July 2026)

DeepOcean continues subsea decommissioning work on BP's Foinaven field West of Shetland, with Ocean Installer subcontracted for follow-on installation and inspection scopes. The BP UKCS divestment (see above) will directly impact future scope allocation on Foinaven and other BP West of Shetland assets.

8. Hydropower & Pumped Storage

GE Vernova selected to modernise 1,728 MW Dinorwig pumped hydro (28 July 2026)

Engie and La Caisse's First Hydro Company selected GE Vernova on 28 July to modernise two of the six units at the 1,728 MW Dinorwig pumped hydro plant in Snowdonia, Wales. The upgrade extends the units' service life by 25 years and modernises electrical, mechanical and control systems. Dinorwig — opened in 1984 — is one of the largest pumped storage plants in Europe and a critical UK grid stability asset. The modernisation is the first phase of a wider First Hydro pumped storage fleet upgrade programme.

> **NES Sales Opportunity:** Dinorwig modernisation opens rare commercial pumped hydro scope for NES firms in high-voltage electrical, mechanical fabrication, hazardous-area electrical, control systems, hydraulic engineering, coatings and welding. GE Vernova (Stafford UK operations base) and First Hydro Company (Engie) are direct engagement points. Additional units at Dinorwig (4 remaining) and future Ffestiniog upgrades represent multi-year pipeline.

Fidra Energy reaches financial close on 500 MW / 1.1 GWh West Burton C BESS (28 July 2026)

Fidra Energy reached financial close on the 500 MW / 1.1 GWh West Burton C Battery Energy Storage System project on 28 July. CMS acted as legal adviser to Fidra. Construction is expected to start immediately with commercial operations targeted for 2027. West Burton C is one of the largest single-site UK BESS projects to reach financial close in 2026. The project is co-located with existing infrastructure at the former West Burton coal power station site.

> **NES Sales Opportunity:** The Fidra West Burton C financial close triggers EPC mobilisation. NES firms in high-voltage electrical, hazardous-area systems, civils, structural steel, coatings and QHSE should engage Fidra Energy and likely EPC contractors (Wartsila, Tesla, Fluence-adjacent) on subcontracting slots.

Zenobe acquires sdp energie (Germany entry with 1.75 GW BESS pipeline) (July 2026)

UK BESS specialist Zenobe acquired German developer sdp energie in a strategic entry into the German BESS market, bringing a 1.75 GW project pipeline. The move signals a wider UK BESS platform internationalisation and validates UK-developed BESS commercial models in Continental European markets.

Eku Energy acquires 300 MW UK BESS project (31 July 2026)

Eku Energy — the Macquarie Asset Management BESS platform — acquired a 300 MW UK BESS project on 31 July, advised by TLT. The acquisition strengthens Eku's UK pipeline and is consistent with ongoing consolidation in the UK BESS market.

RheEnergise secures £8.2m for high-density hydro pilot (July 2026)

RheEnergise — the UK-based developer of high-density hydraulic pumped storage — secured £8.2m in new funding. The company uses a proprietary high-density working fluid (R-19) to deliver pumped storage output at a fraction of the head height of conventional pumped hydro. The technology is being trialled at a pilot site in the UK.

If commercialised at scale, RheEnergise would open pumped storage to sites unsuitable for conventional pumped hydro.

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

The Highland Council confirmed the Pre-Enquiry Meeting for Locogen's Fearna 1,800 MW pumped storage project is scheduled for 13 August 2026 under the Planning and Local Improvement (Scotland) Act 2019 pre-application consultation procedure. Fearna is one of a growing Scottish pumped storage pipeline including Balliemeanoch, Coire Glas and Loch na Cathrach.

Drax H1 2026 — £500m committed to 710 MW BESS since October 2025 (July 2026)

Drax reported that it has committed £500m to 710 MW of UK BESS deployment since October 2025. The programme forms part of Drax's wider strategy pivot from biomass to storage and system services. BSIF (Bluefield Solar Income Fund) delisting under Drax acquisition completes 3 August, with settlement 14 August.

9. Policy

Andy Burnham signals "pragmatic" position on Rosebank and Jackdaw (30–31 July 2026)

Prime Minister Andy Burnham signalled a "pragmatic" position on Rosebank and Jackdaw consents on 30–31 July, drawing warnings from climate-aligned Labour MPs of the first potential revolt of his premiership. The Jackdaw OPRED public consultation closes 10 August; Rosebank closes 17 August. Miatta Fahnbulleh will deliver both consent decisions from DESNZ. Bloomberg reported Burnham saying he "won't ignore" the North Sea, hinting at additional new drilling consents to follow.

BP announces UK North Sea sale process (31 July 2026, see Section 7)

BP's UKCS sale (see Decommissioning section) is a defining policy moment for the UK North Sea. The transaction — combined with the Rosebank/Jackdaw consents and Burnham's pragmatism — signals both continued UKCS production and consolidation among mid-cap operators. Political and regulatory scrutiny will be heightened through H2 2026.

AR8 CfD auction analysis — 17.1 GW eligible offshore wind, tight floating pipeline (30 July 2026)

Renewable Energy Institute (REI) analysis of AR8 published on 30 July confirmed 17.1 GW of eligible offshore wind capacity in Pot 3 (fixed-bottom). Only 232 MW of floating projects with 3 fully consented developments are eligible for Pot 4 in this round, following the tightened Gate 2 requirement. AR8 results are due between 27 November 2026 and 17 February 2027. Applications close 7 August. NES firms should confirm bid-package commitments with Tier 1 EPCIs this week.

Interministerial Group for Net Zero communique published (27 July 2026)

The Interministerial Group for Net Zero, Energy and Climate Change published the communique of its 1 July 2026 meeting on 27 July. The communique covers coordination across the UK Government, Scottish Government, Welsh Government and Northern Ireland Executive on grid, offshore wind consents, CCUS deployment and heat network reform.

Modern Industrial Strategy Year 1: £100bn+ private investment since July 2024 (July 2026)

Bevan Brittan analysis published in July marked the first year of the UK Modern Industrial Strategy. Reported £100bn+ of private investment has been committed since launch. Priority sectors include clean energy, advanced manufacturing, defence, life sciences and financial services. AR8, GBE and cluster CCS investment are core enabling policies.

Miliband greenhouse gas removals plan signed off before DESNZ move (Telegraph, 28 July 2026)

The Telegraph reported on 28 July that Ed Miliband signed off the UK Greenhouse Gas Removals (GGR) programme plan before his move to the Foreign Office. The plan sets policy direction for engineered removals (BECCS, DAC, enhanced weathering) and nature-based removals, feeding into the UK Carbon Budget delivery pathway.

Energy Trends and Prices statistical release (30 July 2026)

DESNZ published the July 2026 Energy Trends and Prices statistical release on 30 July, covering electricity, gas, oil, renewables generation and prices to end-May 2026. Renewables share of generation continues to rise; UK gas dependence remains a key security concern under the current price environment.

DCC Energy £5.6bn KKR/ECP takeover recommended (27 July 2026)

The board of DCC Energy recommended a £5.6bn takeover by KKR and Energy Capital Partners on 27 July. DCC Energy is a leading UK and European fuel distribution and services group. The transaction, if completed, further concentrates infrastructure fund ownership across UK downstream energy services.

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
3 Aug 2026	BSIF delisting under Drax acquisition	London Stock Exchange	Note transaction milestone
7 Aug 2026	AR8 CfD applications close (Pots 3, 4, 5)	DESNZ / LCCC	Confirm Tier 1 LOIs
7 Aug 2026	Ofgem LDES Window 1 SLC consultation closes	Ofgem	Submit response
7 Aug 2026	NI deep-geothermal consultation closes	DfE Northern Ireland	Review scope
10 Aug 2026	Jackdaw OPRED consultation closes	DESNZ / OPRED	Submit position statement
13 Aug 2026	Fearna 1,800 MW pumped storage PLI Pre-Enquiry Meeting	Highland Council	Attend if positioning for Locogen
14 Aug 2026	NSTA ACE Programme applications close	NSTA	Confirm submission
14 Aug 2026	BSIF settlement (Drax acquisition)	LSE	Note transaction closure
17 Aug 2026	Rosebank OPRED consultation closes — Fahnbulleh decision	DESNZ / OPRED	Submit position statement
18–20 Aug 2026	Floating Offshore Wind Conference	P&J Live, Aberdeen	Attend — confirm LOIs with floating developers
19 Aug 2026	DESNZ Strategic Policy Guidance response deadline	DESNZ	Submit response
27 Aug 2026	UK plug-in solar becomes legal (SI 2026/848)	UK-wide	Note residential market change
30 Sep 2026	GBE Supply Chain Fund R3 closes; Abandonment Fee Rules commence	GBE / NSTA	Submit R3 application if eligible

Date	Event / Deadline	Location / Body	NES Action
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	Applications close 7 Aug 2026	Confirm Tier 1 subcontractor LOIs
Clean Industry Bonus (AR8)	DESNZ	Payments on delivery	Demonstrate UK content at bid
GBE Supply Chain Fund Round 3	Great British Energy	Closes 30 Sep 2026	Submit fabrication / manufacturing bids
LDES Cap-and-Floor Window 1	Ofgem	SLC consultation closes 7 Aug 2026	Position for BESS / pumped storage supply
Peak Cluster CCS financing	DESNZ / Private	£59m raised	Track cluster procurement mobilisation
UK Zero Emission Flight (ZEF)	DfT / ATI	£7.3m to 8 projects announced 23 Jul	Airport infrastructure subcontracting
NSTA ACE Programme	NSTA	Applications close 14 Aug 2026	Late-life / decom innovation
Sullom Voe clean fuels hub	Scottish Government	£760k to Veri Energy	Pre-FEED subcontracting
Veri Energy / EnQuest	Private / SG	Ongoing	Sullom Voe H_2 hub scoping
DESNZ Strategic Policy Guidance	DESNZ / Ofgem	Response deadline 19 Aug 2026	Formal industry response

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
BP UKCS divestment	Engage BP Aberdeen procurement, Morgan Stanley, Rothschild and likely acquirer bid teams (Ithaca, EnQuest, Serica, Harbour) to secure contract continuity across marine, subsea, wells, decom, ROV, QHSE, NDT and coatings scopes.	BP Aberdeen; Morgan Stanley; Rothschild	★★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
AR8 CfD subcontracting (closes 7 Aug)	Confirm subcontractor Letters of Intent with Tier 1 EPCIs bidding into Pots 3 and 4. Target the new ODOW category (less contested). Fabrication, cabling, foundations, coatings, marine coordination.	ScottishPower, Ocean Winds, SSE, Iberdrola, Vattenfall Aberdeen offices	★★★★★
Liverpool Bay CCS lease (Eni CCUS)	Approach Eni CCUS Holding, Saipem and Wood/Petrofac/Worley on second-tier scope: offshore pipeline installation, subsea tie-ins, welding, ROV, geotechnical, marine coordination. First injection 2028.	Eni CCUS Holding; Saipem UK; HyNet cluster office	★★★★★
NEP offshore construction (Hartlepool)	Approach Saipem Aberdeen and London offices on second-tier scope: subsea, ROV, geotechnical, marine coordination, coatings, welding. Onshore starts done — offshore now live.	Saipem UK; BP Aberdeen; Equinor UK	★★★★★
GE Vernova Dinorwig modernisation	Approach GE Vernova (Stafford UK) and First Hydro Company (Engie) on subcontracting slots for HV electrical, mechanical, control systems, hydraulic, welding and coatings. 25-year life extension.	GE Vernova UK; First Hydro Company (Engie)	★★★★
Bellrock 1.8 GW electrical scope	Engage Aker Solutions Aberdeen, Unitech Power Systems, Entr and Nadara on floating substation, dynamic cable, mooring, hazardous-area electrical scope for 2028–31 mobilisation.	Aker Solutions Aberdeen; Nadara; Unitech Power Systems	★★★★
Cierco Llŷr Wind AfL (Celtic Sea)	Engage Cierco Energy on floating mooring, dynamic cabling, foundation fabrication and Pembrokeshire port supply-chain positioning. Test-and-demo commercial gate.	Cierco Energy	★★★★
Fidra West Burton C BESS EPC	Approach Fidra Energy and likely EPCs (Wartsila, Tesla-adjacent, Fluence-adjacent) on high-voltage electrical, civils, structural steel, coatings and QHSE. Construction now mobilising.	Fidra Energy; CMS	★★★★
Well-Safe Solutions Well Operatorship	Engage Well-Safe Solutions on subcontracting slots for wells, drilling support, subsea, ROV, marine coordination and QHSE across new Operator scope.	Well-Safe Solutions Aberdeen	★★★★
Crown Estate 1.5 GW Morgan tender	Position with likely bidders and Crown Estate ahead of end-2026 developer selection. Fabrication, cable installation, foundation design.	Crown Estate; Round 4 developers	★★★★
Barrow Green Hydrogen FEED-to-execution	Approach Ramboll and GHECO/Carlton/Schroders consortium on high-integrity welding, hazardous-area electrical, PEM electrolyser install, coatings, NDT.	Ramboll UK; GHECO; Carlton; Schroders	★★★★
Seatrium ORS Lowestoft hub	Engage Seatrium ORS on Tier 2/3 subcontracting for O&M facility fit-out and consider mirroring service capability with NES base for Scottish east-coast fleet.	Seatrium ORS UK	★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
Veri Energy Sullom Voe hub	Engage Veri Energy (EnQuest) on pre-FEED subcontracting for H_2/ammonia production, storage, jetty upgrades, HAZOP and cryogenic scope.	Veri Energy; EnQuest Aberdeen	★★★
ScotWind supply-chain content review	Engage Scottish Enterprise, OWGP, SG Supply Chain team and ScotWind developer procurement offices on missed-slot subcontracting given 36%→29% Scottish share drop.	Scottish Enterprise; OWGP; SG Supply Chain	★★★
Mocean Blue Core floating data centres	Engage Mocean Energy Edinburgh on 2027 demonstration mobilisation — floating platform, mooring, subsea cabling, marine coordination, commissioning.	Mocean Energy Edinburgh	★★★
NSTA CO_2 pipeline studies (Penspen/DNV)	Review both studies and align technical proposition to 2nd Offshore CO_2 Storage Licensing Round. Position for new-build and repurpose pipeline scope.	NSTA; Penspen; DNV	★★★
UK ZEF airport hydrogen infrastructure	Engage Bristow (Aberdeen), ZeroAvia, Urban Foresight and Aberdeen/Prestwick airports on airport H_2 refuelling, cryogenic storage and safety systems.	Bristow Aberdeen; ZeroAvia; Aberdeen Airport	★★★
Zenobe Germany / Eku 300 MW UK BESS	Note UK BESS consolidation and Continental European entry pathways. Position with Zenobe and Eku on UK BESS EPC subcontracting.	Zenobe UK; Eku Energy	★★
Belgium–UK CCS MoU	Track cross-border CO_2 transport implications for UK storage capacity providers and Aberdeen subsea supply chain.	DESNZ; Crown Estate; Eni CCUS Holding	★★
DCC Energy £5.6bn KKR/ECP takeover	Note downstream energy services consolidation. Track UK infrastructure PE ownership trend.	DCC Energy; KKR; ECP	★★

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