INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 2 May 2026

Prepared by ExportCentral AI — North East Energy Supply Sector Space

Coverage Period	Audience	Classification
26 April – 2 May 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

A regular intelligence briefing for North East Scotland energy supply chain companies presenting the latest news, trends, developments and sales opportunities in the UK offshore low-carbon sector — including offshore wind, hydrogen, CCUS, marine energy, hydropower, decommissioning and other offshore renewables.

Executive Summary

This was a high-momentum week for the UK offshore low-carbon sector, dominated by **a major decommissioning contract award, a strategic shift in floating wind ownership, and a significant policy step toward AR8**. The headline development for NES supply chain companies is **Well-Safe Solutions winning what it describes as the "largest-ever North Sea decommissioning scope"** — a multi-year contract with Apache North Sea Limited covering platform and subsea wells in the Forties Field, with work beginning in 2026 and supporting hundreds of Aberdeen-based jobs.

In floating offshore wind, **Vattenfall has exited the Muir Mhòr joint venture** and Fred. Olsen Seawind has agreed to assume 100% ownership of the up-to-1 GW Scottish project subject to Crown Estate Scotland and regulatory approvals, consolidating control under a single sponsor and signalling a new phase of supply chain engagement for ScotWind floating projects sitting alongside Bellrock in the consent pipeline.

On policy, DESNZ updated the **Allocation Round 8 (AR8) collection on 23 April** with the final Clean Industry Bonus (CIB) framework, formal statutory notices and a confirmed CIB application window of **13–21 May 2026** clearing a critical procedural gate ahead of the AR8 auction opening in July 2026. In hydrogen, **over 40 organisations urged Ed Miliband on 29 April to select HyNet** as the UK's first regional hydrogen network. Subsea7 reported strong Q1 2026 renewables results on 30 April, confirming that **Seaway Ventus installed foundations at East Anglia THREE** during the quarter, a tangible NES-relevant supply chain milestone.

NESO grid data also confirmed **record clean-power performance** over the Easter weekend: gas generation fell to **1.2% of the energy mix** on 22 April - an all-time low - with the system running at **98.8% zero-carbon between 15:30 and 16:00**. All-Energy 2026 in Glasgow (13–14 May) and the OEUK Wind Insight 2026 Aberdeen briefing (6 May) are now the immediate priority engagements for NES companies.

1. Offshore Wind — Fixed Bottom

Subsea7 Q1 2026 Results: Seaway Ventus Installs Foundations at East Anglia THREE

Subsea7 announced its **Q1 2026 results on 30 April 2026**, reporting revenue of **$1.79 billion (up 17% year-on-year)**, adjusted EBITDA of $385 million (up over 60%) and a backlog of **$13.5 billion**.

Renewables-vessel utilisation reached **81%**, with Seaway Ventus **installing foundations at East Anglia THREE** during the quarter and Seaway Aimery and Seaway Moxie active on cable pull-in. Subsea7 also raised full-year

2026 guidance to revenue of $7.4–7.8 billion and adjusted EBITDA margin of ~23%, reflecting strong project execution across UK and European offshore wind.

> **NES Sales Opportunity:** Subsea7's strong Q1 confirms the ramp-up of installation activity at East Anglia THREE. Aberdeen-based marine logistics, vessel agency, fabrication of installation aids and offshore personnel/PPE specialists should be tracking Subsea7's 2026 vessel programmes (Seaway Ventus, Aimery, Moxie) for sub-tier opportunities. The raised full-year guidance also signals continued tier-1 contractor demand for Scottish IRM, ROV and survey services.

AR8 Clean Industry Bonus Framework Finalised: 13–21 May Window

On **23 April 2026**, DESNZ updated the Contracts for Difference Allocation Round 8 (AR8) collection to publish the **final Clean Industry Bonus (CIB) framework**, supporting guidance and the formal statutory notices required to establish AR8 under the Contracts for Difference (Allocation) Regulations 2014. All previously published draft CIB documents have been replaced with finalised versions, and the CIB application window has been confirmed as **13 May to 21 May 2026**. Earlier in the week, GOV.UK also published guidance specifically **for fixed-bottom and floating offshore wind projects** on the CIB framework. The AR8 auction itself is scheduled to open in July 2026 with extended 20-year CfD contract terms confirmed under AR7.

> **NES Sales Opportunity:** The CIB framework rewards developers for spending in higher-emissions, deprived areas of the UK supply chain. NES Tier 2/3 companies bidding for fabrication, blade, foundation, cable, mooring and O&M sub-contracts within AR8-bound projects should prepare a CIB-aligned value proposition (UK content, regional employment, decarbonisation of own operations) for inclusion in tier-1 bid responses now, well ahead of AR8 results in late 2026.

Outer Dowsing Offshore Wind: Consent Order in Force

The Outer Dowsing Offshore Wind Farm Order 2026 took effect, with consent confirmed by the UK Government in February and the Order having been **made in February 2026** under the Planning Act 2008. The 1.5 GW project sits in the southern North Sea off the Lincolnshire coast; full operational capacity is expected by the end of the decade and the project is now moving into pre-construction supply chain engagement.

> **NES Sales Opportunity:** Outer Dowsing is the first major fixed-bottom UK consent of 2026 to enter pre-FEED supply chain procurement. NES fabricators, monopile/transition piece manufacturers, environmental consultants, marine survey firms and vessel operators with East Coast logistics access should engage Outer Dowsing's sponsors directly during 2026 to position for 2027–2028 procurement.

UK Grid Records: Gas Falls to 1.2% of Mix, Solar Tops 15 GW

NESO published transmission system data confirming new clean-power milestones over Easter: on **22 April 2026 between 15:30 and 16:00**, the system ran at **98.8% zero-carbon** (beating the 1 April record), with **gas-fired generation falling to an all-time low of 1.2% of the energy mix**. On **23 April**, UK solar generation breached **15 GW for the first time**, peaking at 15,158 MW (42% of total generation). The records reinforce the UK government's case for continued offshore wind expansion and accelerated grid integration through the Connections Reform process.

2. Floating Offshore Wind

Vattenfall Exits Muir Mhòr — Fred. Olsen Takes 100% Control

In the week's most strategically important floating wind development, **Vattenfall confirmed its exit from the Muir Mhòr floating offshore wind joint venture** on 22 April 2026, with Fred. Olsen Seawind agreeing to assume **full**

100% ownership via share sale. The transaction is subject to regulatory approvals including consent from Crown Estate Scotland. Muir Mhòr, located in the central North Sea off the Aberdeenshire coast and originally awarded under ScotWind, has a planned capacity of **up to 1 GW**. Coverage continued through 26 April (Inspenet) confirming Fred. Olsen's consolidated control and a refocus on commercial-readiness milestones. The move is consistent with a broader European trend of utilities rationalising floating wind portfolios while specialist developers consolidate ownership ahead of FEED.

> **NES Sales Opportunity:** A single-sponsor structure simplifies supply chain engagement. NES Aberdeen-area companies, particularly those with mooring, dynamic-cable, floating substructure fabrication, marine survey and offshore installation experience, should re-engage Fred. Olsen Seawind's UK procurement team directly. With Bellrock's 1.8 GW (Nadara) and Muir Mhòr's 1 GW now both consolidating in the central North Sea, the cumulative floating-wind procurement opportunity within 200 km of Aberdeen has stepped up materially.

Bellrock Application Tracking — Continued Industry Coverage

Industry coverage of **Nadara's 1.8 GW Bellrock consent application** (lodged 21 April) continued through the reporting week, with Windtech International (23 April), Inspiratia and follow-up sector commentary confirming the project's position as the largest ScotWind floating wind project to enter the consent pipeline. Scottish Government review will now run in parallel with NESO's Connections Reform process; firm grid connection dates are expected in early 2027.

> **NES Sales Opportunity:** NES port and logistics, subsea engineering, environmental services and offshore installation contractors should treat Bellrock and Muir Mhòr as a paired procurement opportunity given their proximity and overlapping FEED windows. Building shared capability statements that address both projects will improve tier-1 visibility.

UK Floating Wind Pipeline Context

The combined ScotWind floating pipeline, including Bellrock (1.8 GW), MarramWind (3 GW), Muir Mhòr (up to 1 GW), Cenos, Salamander and Ayre, now represents over 19 GW of consented or pre-consent floating wind capacity. With Port Talbot's £64m floating wind hub progressing in the Celtic Sea, Scottish ports at Cromarty Firth, Kishorn and Ardersier remain critical pre-construction infrastructure for the Scottish projects, and 2026–2028 will be the principal window for port-related procurement and integration contracts.

3. Hydrogen

Industry Coalition Urges Government to Select HyNet as First Hydrogen Network

On **29 April 2026**, a coalition of **over 40 organisations employing more than 9,000 people across nine sectors** wrote to the Secretary of State for Energy Security and Net Zero, Ed Miliband MP, urging the UK Government to select **HyNet** as the country's first regional hydrogen transport and storage network. The letter highlights that HyNet's hydrogen system would span two countries and four strategic authorities, building on the cluster's existing carbon capture network. Signatories cite hydrogen demonstrations already completed in glass manufacturing and aluminium recycling, plus the Office for Clean Energy Jobs Regional Skills Pilot and the upcoming HyNet Supply Chain Summit. The decision is expected to feed directly into the first Hydrogen Transport and Storage allocation round, targeted for launch in 2026.

> **NES Sales Opportunity:** Even though HyNet is North-West-England-anchored, the precedent the Government sets for the UK's first regional hydrogen network will define the procurement model used for any

subsequent Scottish (Cromarty / Acorn-linked) and Humber (H2H Saltend / Aldbrough) hydrogen networks. NES pipeline engineering, compression, instrumentation, safety and integrity firms should monitor the HyNet decision closely and use it to scope tender-ready capability statements for follow-on networks.

Scottish Hydrogen Pipeline — Cromarty and Whitelee Progress

Cromarty Hydrogen, named in the original HAR1 contract cohort, remains the most advanced electrolytic hydrogen project in Scotland, with engineering work continuing through Q2 2026. ScottishPower's Whitelee 20 MW green hydrogen project, for which Black & Veatch completed FEED in 2025, also remains on the pre-FID pipeline. The HAR2 shortlist of approximately 765 MW is expected to advance toward final award decisions by mid-2026.

> **NES Sales Opportunity:** NES electrolyser integration, hydrogen compression, purification, storage vessel and process engineering firms should target Cromarty Hydrogen, Whitelee and named HAR2 projects directly. Given UK demand-creation has been identified as the principal hydrogen bottleneck (per Xoserve analysis), companies that can credibly bring hydrogen offtakers into project conversations will materially improve win rates with developers.

4. Carbon Capture, Utilisation & Storage (CCUS)

ECC NPT Pathfinder — Engagement Event 8 May, EOI Deadline 12 May

The DESNZ-confirmed **East Coast Cluster (ECC) Non-Pipeline Transport (NPT) Pathfinder** selection process remains the most time-critical CCUS opportunity in the briefing. The official engagement session is scheduled for the **week commencing 4 May 2026**, with online sessions hosted on Eventbrite. Expressions of Interest must be submitted by **11:59pm on 12 May 2026**, and full applications close on **12 June 2026**. Successful applicants will access remaining offshore storage capacity at the Endurance site in the southern North Sea, with first injections targeted by 2032.

> **NES Sales Opportunity:** **Urgent action required.** NES companies in offshore CO_2 injection, well services, subsea infrastructure, monitoring, marine survey and CCUS-specific engineering should immediately attend the engagement session, register an EOI by 12 May, and engage with prospective Pathfinder applicants as supply chain partners. Aberdeen-based oil-and-gas service capability is directly transferable to Pathfinder scopes and Scotland-based suppliers should not assume the East Coast Cluster is geographically out of reach.

UK CCS Subsidies Boost Case for Renewables Expansion

On **29 April 2026**, a Carbon Pulse-published policy paper concluded that **UK CCS subsidies are strengthening the case for renewable expansion** across the EU confirming that the UK's Track-1 funding decisions and CfD-style support for capture projects are now setting the European benchmark for hybrid carbon-management economics. The analysis reinforces continued political momentum behind UK CCUS in the run-up to AR8 and the Future Network Strategy formal publication.

Track-1 and Track-2 Status

Track-1 capture projects (Net Zero Teesside Power, BP Net Zero Teesside, HyNet capture, Equinor H2H Saltend, ENI Liverpool Bay, Viking, Acorn) remain in pre-construction and FID-preparation phases. The IEA confirmed earlier in April 2026 that global CCUS capture capacity in operation or under construction grew **over 10% year-on-year through Q1 2026**. The OEUK North Sea CCS & Hydrogen Summit 2026 (1–2 June, Edinburgh) remains the most focused business-development event of the next 60 days for Scottish CCUS supply chain firms.

5. Marine & Tidal Energy

Welsh Tidal Sector Calls for Action — Implications for UK Pipeline

A **24 April 2026** guest column by Andy Billcliff, Chief Executive of Menter Môn Morlais Ltd (which manages the Morlais tidal stream project off Anglesey), called for faster consenting, predictable CfD ringfencing and dedicated supply-chain support for tidal energy in the run-up to the Senedd elections. The intervention reinforces UK-wide industry pressure for the existing tidal stream CfD ringfence to be extended and increased, particularly given the UK–France 400 MW collaboration confirmed at WindEurope Madrid the previous week.

> **NES Sales Opportunity:** Aberdeen-area subsea engineering, mooring, marine survey and ROV firms should track the Wales / Morlais market alongside the Scottish (EMEC, MeyGen) tidal pipeline. The Marine Energy Council's position on AR8 ringfencing will be a key signal for sector procurement timing.

EMEC and MeyGen Pipeline

Earlier-quarter announcements continue to underpin near-term marine procurement: the **£15 million Blue Horizon investment** in EMEC (UKRI funding) is moving Orkney from single-device trials to multi-device array demonstrations, while MeyGen Phase 2 in the Pentland Firth remains the UK's flagship commercial tidal expansion. Both projects continue to offer near-term subsea cabling, marine installation, mooring and environmental monitoring scopes accessible to Aberdeen-based offshore service companies.

6. Decommissioning

Well-Safe Solutions Wins Largest-Ever North Sea Decommissioning Scope — Forties Field

The week's most commercially significant award for NES companies came on **22–24 April 2026**: **Well-Safe Solutions announced a multi-year contract with Apache North Sea Limited** to decommission **platform wells and subsea wells in the Forties Field** described by Well-Safe as the **"largest-ever North Sea decommissioning scope"** it has been awarded. Work begins in 2026 and Well-Safe will lead all well project management, well and subsurface engineering, and offshore delivery. The contract supports **hundreds of jobs in Aberdeen** and provides a direct boost to the North-East Scotland economy.

Phil Milton, CEO of Well-Safe Solutions, described the award as a **"defining moment"** for the company and a "powerful signal to the supply chain", while highlighting that the availability of mobile offshore drilling units (MODUs) capable of platform and subsea well work has **declined significantly year-on-year, with just five semi-submersible rigs remaining on the UKCS**. Apache's VP Decommissioning Donald Martin confirmed Apache is focused on "maximising late-life asset value" across one of the North Sea's cornerstone assets. The award follows the Redwater Insights report (23–24 April) that identified up to 25,000 UK jobs and £15bn in economic benefit from accelerated decommissioning enforcement.

> **NES Sales Opportunity:** This is an immediate, high-value award flowing directly to North-East Scotland. Well-Safe's sub-contractor and supply chain pull-through will include well intervention services, subsea well access systems, casing and tubing logistics, completions specialists, waste management, ROV services, marine logistics, MODU support, environmental monitoring, accommodation and crew change. NES Tier 2/3 firms should engage Well-Safe's procurement team this quarter to position for 2026 mobilisation. The MODU shortage signals constrained vessel availability. Companies offering integrated services that reduce rig-time exposure will have particular commercial leverage.

OPRED Decommissioning Charging Regulations 2026 — Guidance Active

The OPRED Decommissioning Charging Regulations 2026 guidance, updated in April 2026, sets the current regulatory framework for offshore oil and gas decommissioning under the Petroleum Act 1998. With the Redwater Insights report calling for the NSTA to be granted enhanced enforcement powers and the Forties Field award beginning in 2026, decommissioning activity in the central and northern North Sea is expected to step up significantly through Q3 2026.

7. Hydropower & Pumped Storage

LDES Cap and Floor — 2026 Critical Year for FID Decisions

The Long Duration Electricity Storage (LDES) cap and floor regime, administered by Ofgem, remains the central enabler for SSE Renewables' **Coire Glas pumped storage hydro project** on Loch Lochy (up to 1,300 MW / 30 GWh) and the wider 11-scheme, 10 GW UK PSH pipeline. Industry analysis published earlier in April 2026 reinforces that 2026 is the **"critical year"** for cap-and-floor allocation decisions, which will drive FID for Coire Glas and several Highland projects (Earba Storage, Loch Kemp, Loch na Cathrach/Statkraft). SSE has already invested £100m in Coire Glas pre-FID development, with grid connection confirmed for October 2029.

> **NES Sales Opportunity:** NES civil engineering, tunnelling, electrical infrastructure, turbine OEM partners, environmental monitoring, geotechnical and grid connection specialists should engage SSE Renewables' Coire Glas procurement team and Statkraft's Loch na Cathrach team during Q2 2026 — ahead of cap-and-floor outcomes that may unlock FIDs in late 2026. Highland-located civil works represent a multi-year procurement window for Scottish supply chain firms with cost-competitive logistics access.

8. Policy & Regulatory Developments

AR8 Statutory Notices and CIB Timetable Confirmed (23 April 2026)

DESNZ's 23 April update added **formal statutory notices** under the Contracts for Difference (Allocation) Regulations 2014 to the AR8 collection, formally giving effect to the establishment of Allocation Round 8. All draft Clean Industry Bonus documents have been replaced with final versions. The CIB application window opens **13 May 2026** and closes **21 May 2026**, a fixed window with no extensions. AR8 itself is targeted to open in July 2026 with results expected late 2026.

UK Habitats and Species (Offshore Wind) Regulations Debate

On **27 April 2026**, the House of Commons General Committees debated the Draft Conservation of Habitats and Species (Offshore Wind) regulations — secondary legislation designed to streamline environmental consenting for offshore wind developments while maintaining UK obligations under the Habitats Directive. The reform is part of the Government's broader Clean Energy Superpower mission to accelerate consenting timelines and reduce derogation friction for sector-specific NSIPs.

> **NES Sales Opportunity:** Streamlined consenting reduces project schedule risk for ScotWind, AR8-bound and Crown Estate Round 6 projects directly improving the visibility of NES tier-2 procurement into 2027–2028 procurement cycles. NES environmental consultants and marine ecology survey specialists should monitor secondary legislation publication closely; new guidance may shift surveying scope and timing.

Connections Reform — Strategic Energy Planning

Ofgem's 21 April blog **"Strategic energy planning and connections reform in 2026"** reinforced that NESO's Connections Reform process driving firm grid connection dates for ScotWind floating projects (including Bellrock and Muir Mhòr) is moving into implementation phase through 2026. Strategic Spatial Energy Plan inputs are now being integrated. Firm connection dates for Bellrock are still expected by early 2027.

European Wind Output and Cable Resilience

S&P Global Commodity Insights data published **1 May 2026** confirmed European wind output rose **28% year-on-year in April 2026** (solar +18%), reinforcing the macro case for offshore wind expansion. The Five-TSO North Sea cable resilience MoU signed at WindEurope Madrid (Belgium, Denmark, Germany, Netherlands TSOs) continues to drive demand for inspection, repair and maintenance (IRM) services, with EnBW awarding framework subsea inspection contracts to RS Diving on **28 April 2026** under multi-year framework agreements running to 31 March 2031 — a useful procurement model reference for UK TSO contracts.

9. Key Upcoming Events for NES Companies

Event	Date	Location	Relevance
OEUK Aberdeen Breakfast Briefing: Wind Insight 2026	6 May 2026	P&J Live, Aberdeen	Offshore wind pipeline, grid access, AR8 readiness
ECC NPT Pathfinder Engagement Session	w/c 4 May 2026	Online (Eventbrite)	CCUS East Coast Cluster project briefing
AR8 Clean Industry Bonus Application Window	13–21 May 2026	Online (DESNZ)	CfD CIB statutory window — final framework live
All-Energy 2026	13–14 May 2026	SEC, Glasgow	UK's leading renewable & low-carbon energy event
ECC NPT Pathfinder EOI Deadline	12 May 2026	Online	CCUS East Coast Cluster project access
OEUK North Sea CCS & Hydrogen Summit	1–2 June 2026	Sheraton, Edinburgh	CCS / hydrogen project intelligence
SPE Aberdeen Well Decommissioning 2026	3–4 June 2026	P&J Live, Aberdeen	Decommissioning sector — post Forties announcement
ECC NPT Pathfinder Application Deadline	12 June 2026	Online	CCUS Pathfinder full submissions close
Global Offshore Wind 2026	16–17 June 2026	Manchester Central	Full offshore wind value chain

10. Grant Funding & Support Mechanisms Active This Week

Fund / Mechanism	Value	Deadline	Eligible NES Companies
AR8 Clean Industry Bonus	CfD-linked premium	13–21 May 2026 application window	Fixed-bottom & floating offshore wind developers and supply chain partners (UK content, regional jobs)
GBE Supply Chain Fund: Offshore Wind & Networks	Up to £300m capital grants	10 December 2026	Manufacturers of offshore wind components, cables, foundations, nacelles

Fund / Mechanism	Value	Deadline	Eligible NES Companies
OWGP Industrial Growth Fund	£300k – £25m per project	Rolling	Supply chain firms expanding/building offshore wind manufacturing
ECC NPT Pathfinder Selection Process	Project support	12 June 2026 (EOI: 12 May)	CCUS project developers and supply chain
GBE £300m Supply Chain Fund drawdown window	Capital grants	Apr 2026 – Mar 2030	UK manufacturing capacity expansion
LDES Cap and Floor (Ofgem)	Revenue support framework	2026 — outcomes pending	Pumped storage hydro developers and Scottish civil/electrical supply chain

11. Sales Opportunity Summary for NES Supply Chain Companies

Sector	Opportunity	Timing	Priority
Decommissioning	Well-Safe Solutions / Apache Forties Field — sub-contractor pull-through, MODU support, well services	Immediate (2026)	★★★★★
Floating Wind	Muir Mhòr (Fred. Olsen Seawind, up to 1 GW) — re-engagement under sole sponsor	Now–2030	★★★★★
Floating Wind	Bellrock 1.8 GW (Nadara) — supply chain engagement phase	Now–2030	★★★★★
CCUS	ECC NPT Pathfinder — engagement w/c 4 May, EOI 12 May	Urgent	★★★★★
Fixed Wind	East Anglia THREE — Subsea7 sub-tier IRM, vessel and logistics scopes	Immediate	★★★★
Policy / CfD	AR8 Clean Industry Bonus — 13–21 May application window	Urgent	★★★★
Decommissioning	500 overdue wells + 1,700 due in 6 years — broader UKCS P&A pipeline	Immediate	★★★★
Pumped Storage	Coire Glas / Statkraft / Earba — civil, electrical, grid works pre-FID	2026–2029	★★★
Hydrogen	Cromarty Hydrogen + HAR2 contracted projects + HyNet decision precedent	2026–2027	★★★
Marine / Tidal	EMEC Blue Horizon array expansion, MeyGen Phase 2	2026–2028	★★★
Cables	EnBW / Five-TSO inspection framework precedent — UK IRM positioning	2026–2028	★★★
CfD Supply Chain	GBE Supply Chain Fund — manufacturing grant (closes Dec 2026)	Open now	★★★

This briefing covers the period 26 April – 2 May 2026. All opportunity ratings reflect proximity, scale, and fit with typical NES Tier 2/3 company capabilities. This briefing is prepared by ExportCentral AI for use by North East Scotland energy supply sector participants.

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