UK OFFSHORE LOW-CARBON INTELLIGENCE BRIEFING

Week Ending 22 August 2026

Coverage Period	Audience	Classification
16 – 22 August 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

The seven days to 22 August 2026 delivered a decisive UK offshore-wind construction milestone, the closure of the two most consequential UKCS upstream consultation windows of the year, and a cluster of grid, storage and data-centre policy actions that will shape supply-chain workbooks into 2027.

On 17 August, ScottishPower Renewables and Masdar confirmed that all 95 monopile foundations — each 1,200 to 1,800 tonnes, 67 to 84 metres tall and up to 10.6 metres in diameter — have been installed at the 1.4 GW East Anglia THREE offshore wind farm 69 km off the Suffolk coast, with Seaway7's jack-up vessel Seaway Ventus completing the largest monopiles ever set from a jack-up in Europe. The joint venture has now started turbine installation and continues inter-array cabling, targeting operations by end 2026 on the £4 billion project.

At the same time the marshalling side of the UK offshore-wind build-out took a step forward: SSE Renewables and Maraen Port of Nigg announced up to 180 skilled offshore-wind jobs on 12 August at the Highlands port to support Dogger Bank B and C — covered by trade press through the week ending 22 August.

The North Sea Transition Authority's 13 August publication of the 2026 UKCS Decommissioning Cost and Performance Update and Well Decommissioning Charter continued to reverberate this week, with AquaTerra Group reporting record North Sea demand on 21 August (over 150 personnel offshore and more than 200 equipment kits on hire) and DeepOcean completing the Teal West subsea tieback to the Anasuria FPSO on 20 August — both live confirmations of NES late-life and decommissioning workbook expansion.

On policy, the Rosebank OPRED consultation closed at midnight on Monday 17 August; the £8.7 billion Adura-operated field now sits with Energy Secretary Miatta Fahnbulleh alongside Jackdaw, with a ministerial decision expected within weeks. Ofgem's LDES Window 1 revised special licence conditions call for input closed at 23:59 on 18 August, DESNZ's Draft Strategic Policy Guidance for Electricity Networks Growth consultation closed on 19 August, and Scotland's Public Finance Minister Hannah Mary Goodlad issued a Direction on 17 August requiring planning authorities to notify Ministers of every new data-centre application above 50 MW within seven days.

Cornish Lithium secured £7.2 million of DRIVE 35 government funding on 12 August for the Cross Lanes Geothermal Lithium project in Cornwall (in-window trade coverage through 14 August), Sumitomo Corporation's 33.3% stake in the 1.5 GW Gwynt Glas Celtic Sea floating wind project drew mid-week UK trade press through 20 August, and SSE Renewables secured consent to double its Mullaghfarry BESS duration in Scotland.

NES Tier 2/3 firms must move now to lock in subcontract Letters of Intent across foundations, marshalling, dynamic cabling, well P&A, subsea tie-in, decommissioning and grid infrastructure ahead of the Rosebank/Jackdaw ministerial decisions and the Ofgem LDES final awards this autumn.

1. Offshore Wind — Fixed Bottom

All 95 monopile foundations installed at 1.4 GW East Anglia THREE — largest ever set from a jack-up in Europe (17 August 2026)

ScottishPower Renewables and Masdar announced on 17 August that Seaway7 has completed installation of all 95 monopile foundations and their transition pieces at the 1.4 GW East Anglia THREE offshore wind farm, 69 km off the Suffolk coast. The monopiles weigh 1,200 to 1,800 tonnes, stand 67 to 84 metres tall and are up to 10.6 metres in diameter — the largest ever installed from a jack-up vessel in Europe, using Seaway7's Seaway Ventus. Each 400-plus-tonne transition piece is 20 metres high and eight metres wide. Turbine installation has now started and inter-array cable installation is progressing in parallel. The £4 billion project is targeted for operations by the end of 2026 and is expected to power more than one million UK homes. ScottishPower Renewables CEO Charlie Jordan highlighted that more than 200,000 tonnes of steel have now been anchored across a seabed area equivalent to almost 43,000 football pitches. Iberdrola-linked monopile manufacturing (Navantia Seanergies and Windar Renovables) supplied a significant share of the pile fabrication.

> **NES Sales Opportunity:** The completion of the East Anglia THREE foundation campaign is a live proof-point for very-large-diameter monopile handling and marshalling in UK offshore wind. NES Tier 2/3 firms in monopile secondary steel, coating, cathodic protection, transition-piece steel and access systems, dynamic export cable pull-in, ROV inspection, marine warranty, guard vessel and marine coordination should approach Seaway7, ScottishPower Renewables (Glasgow/Aberdeen), Masdar UK, Iberdrola and Navantia Seanergies procurement immediately for East Anglia THREE turbine-installation and commissioning sub-contract scope through end 2026, and for read-across to East Anglia ONE North, East Anglia TWO and future ScottishPower AR8 East Anglia scope.

Up to 180 skilled offshore-wind jobs confirmed at Maraen Port of Nigg for Dogger Bank B and C (reported through 22 August 2026)

SSE Renewables and Maraen confirmed up to 180 skilled offshore-wind roles at Maraen Port of Nigg near Inverness — selected as the marshalling harbour for the 3.6 GW Dogger Bank B and C phases. The announcement was made in the presence of Scottish Energy Minister Stephen Gethins MSP on 12 August and covered through the week ending 22 August in Scottish energy trade press. Roles include project managers, port operators and mechanical and electrical technicians handling pre-assembly of GE Vernova's 13 MW and 14 MW Haliade-X turbine components ahead of offshore transport. Recruitment is under way and the roles will support project activity through to expected Dogger Bank completion in mid-2028. Nigg previously supported SSE's Beatrice and Seagreen offshore wind farms and is now a strategic Scottish marshalling asset for Dogger Bank turbine components.

> **NES Sales Opportunity:** The 180 Nigg roles anchor the largest Scottish offshore-wind marshalling workbook of the decade. NES Tier 2/3 firms in high-voltage electrical, hazardous-area systems, mechanical fabrication (BHC), rigging, structural steel, coatings, protective wrap, quayside civils, marine coordination, marine warranty and QHSE should approach SSE Renewables (Perth/Inverness), Maraen and GE Vernova Vestas UK procurement immediately. Nigg is now a recurring UK marshalling reference point for future ScotWind and Round 6 turbine components as well.

AR8 CfD NESO qualification window remains active to 16 September 2026 (August 2026)

The eighth Contracts for Difference Allocation Round (AR8) continues in the NESO qualification assessment phase from 10 August to 16 September 2026 across all pots, including Pot 3 (fixed-bottom offshore wind with over 17 GW of eligible capacity at £113/MWh 2024 prices) and Pot 4 (floating offshore wind and Other Deepwater

Offshore Wind at £271/MWh). AR8 is the first allocation round to require Gate 2 (or Gate 1 CPCR) connection status. The DESNZ Contract Budget Notice is expected in November. Results will be announced across all technologies between 27 November 2026 (earliest) and 17 February 2027 (latest). Pot 3 is split by transmission tariff zones 1–12 versus 13–27. Clean Industry Bonus now applies across all AR8 offshore-wind categories, so UK content evidence remains decisive at bid.

> **NES Sales Opportunity:** This coming fortnight is decisive for locking in Tier 1 EPCI and OEM sub-contract Letters of Intent for AR8 Pot 3. NES firms should confirm commitments across foundation fabrication, dynamic cabling, offshore substation electrical, hazardous-area electrical, coatings, marine coordination and topsides commissioning with ScottishPower Renewables, SSE Renewables, Ocean Winds, Iberdrola, Vattenfall, Equinor and the Ossian JV (SSE/CIP/Marubeni). Aberdeen developer offices remain the direct engagement points.

2. Floating Offshore Wind

Sumitomo 33.3% stake in 1.5 GW Gwynt Glas Celtic Sea floating project confirmed in UK trade press through 20 August (August 2026)

Sumitomo Corporation's acquisition of a 33.3% equity interest in the 1.5 GW Gwynt Glas floating offshore wind project in the Celtic Sea — alongside EDF power solutions UK and Ireland and ESB, each also on 33.3% — was widely covered in UK and international trade press through the week to 22 August, with Windtech International republishing the transaction on 20 August. Gwynt Glas sits approximately 40 km off Wales, secured its Crown Estate Round 5 seabed lease and signed its Agreement for Lease in October 2025. The developer submitted its EIA Scoping Report to the Planning Inspectorate, Natural Resources Wales and the Marine Management Organisation this summer; consent application is targeted for around 2028 with expected commercial operation in the late 2030s. Sumitomo's participation is the company's first floating wind investment and reflects a wider Japanese-UK floating capital pipeline, including Ossian, Green Volt and Erebus, totalling around 5.9 GW backed by Japanese capital and £9 billion of committed Japan-UK offshore-wind investment.

> **NES Sales Opportunity:** Japanese and Irish institutional capital is now cemented at Gwynt Glas, moving the project into a multi-year supply-chain qualification phase. NES firms with floating foundation fabrication, mooring, dynamic array and export cable, floating substation electrical, HV commissioning, marine coordination and marine warranty capability should approach EDF power solutions UK/Ireland, ESB and Sumitomo Europe procurement now to be sequenced into the 2027–28 pre-consent supplier qualification. Aberdeen floating-content credentials remain a differentiator.

UK trade coverage flags floating wind as the natural next phase as shallow-water leasing runs down (21 August 2026)

The Telegraph published a UK-market analysis on 21 August under the headline "Britain turns to floating wind farms as it runs out of shallow waters", reflecting continued transition of UK offshore-wind capital and construction attention toward deeper water and floating platforms. The article positions the Celtic Sea (Gwynt Glas, Erebus, Llanwrst-adjacent projects), ScotWind floating leases and Innovation and Targeted Oil and Gas (INTOG) sites as the anchor of UK offshore-wind supply-chain workload beyond 2028. The Crown Estate has targeted 4.5 GW of Celtic Sea floating by 2035 and 12 GW by 2045. Gwynt Glas alone represents about a third of the first-phase target. UK floating supply chain readiness — fabrication capacity, mooring, dynamic cabling, marine coordination and marine warranty — remains the decisive constraint.

> **NES Sales Opportunity:** The UK press consensus is now that floating is the next UK offshore-wind volume growth engine — not fixed bottom. NES firms should treat floating supply-chain positioning as a strategic

> priority through 2028. Prioritise Aker Solutions, Nadara, Green Volt, Cenos, MarramWind, Salamander and Bellrock engagement plus INTOG-adjacent operators, and finalise pitch materials ahead of the 7–8 October Floating Offshore Wind Conference in Aberdeen.

3. Hydrogen

HAR2 electrolytic hydrogen contract awards remain scheduled for later in 2026 (August 2026)

The HAR2 (Hydrogen Allocation Round 2) contract awards remain scheduled for later in 2026, with no material published movement in the week to 22 August. HAR2 will award new electrolytic hydrogen contracts building on the December 2023 HAR1 portfolio. Scottish HAR2 candidate sites include Sullom Voe (Veri Energy/EnQuest) and Cromarty and Grangemouth (Ineos, Scottish Power/Storegga). HAR3 process design also continues, with market engagement flagged into H2 2026. Hydrogen production and industrial demand remain anchor priorities within DESNZ's Modern Industrial Strategy Year 1 review. The Hydrogen Energy Association's State of the Hydrogen Nation report continues to be cited by industry stakeholders as the reference position on UK hydrogen sentiment.

> **NES Sales Opportunity:** The next four months are decisive for NES firms positioning against HAR2 awards. Priorities include pre-qualifying with Veri Energy/EnQuest (Sullom Voe), Scottish Power/Storegga (Cromarty), Ineos (Grangemouth) and Owner's Engineer Ramboll on hazardous-area electrical, mechanical fabrication, high-integrity welding, coatings, cryogenic/high-purity gas systems, HV commissioning and QHSE credentials. HAR3 market engagement is also open — use trade-body channels (Hydrogen UK, Scottish Renewables) to feed formal sub-contractor evidence into the process.

HAR1 delivery transition to execution continues — Barrow, Cromarty and Whitelee stay closest to FID (August 2026)

The HAR1 electrolytic hydrogen contract portfolio, awarded in December 2023, continues its transition from FEED to execution through August 2026. The 10 HAR1 contracts total 120 MW of electrolytic capacity and include Barrow Green Hydrogen (21 MW, Carlton Power — closest to FID), Bradford Low Carbon Hydrogen (24.5 MW, Hygen), Cromarty Hydrogen (10.6 MW, Scottish Power/Storegga), Whitelee Green Hydrogen (7.1 MW, Scottish Power), Trafford (10.5 MW, Carlton Power), West Wales Hydrogen (14.2 MW, H2 Energy/Trafigura) and others. Continued delivery pressure is a HAR1 portfolio-wide feature. Hydrogen UK reports UK hydrogen production could unlock up to £11 billion of private investment and support more than 12,000 jobs by 2030 if delivery accelerates.

DESNZ call for evidence on domestic CO2 supply resilience closed 18 August — read-across for hydrogen off-take (August 2026)

The UK Government's call for evidence on domestic CO2 supply resilience closed on 18 August, following recent UK industrial CO2 shortages. The call is primarily focused on the food and drink supply chain but has direct read-across for low-carbon hydrogen off-take (particularly for CCUS-linked blue-hydrogen projects), industrial gases and by-product CO2 valorisation. Formal responses were sought from producers, refiners, off-takers, industrial gas companies and infrastructure operators. The Government response will inform the next stage of UK CO2 market policy and is expected to influence CCUS Track 1 and Track 2 CO2 off-take design.

4. CCUS

CCSA statement on Onward net-zero cost report published 19 August — industry re-anchors CCUS delivery case (19 August 2026)

The Carbon Capture and Storage Association (CCSA) published a formal statement on 19 August responding to think-tank Onward's recent report on the cost of net zero and a subsequent speech by former minister Claire Coutinho. The CCSA re-emphasised that more than 100 UK CCUS projects are currently in development with the potential to capture over 77 Mt of CO_2 per year, alongside 22 CO_2 storage licences in development across the UK. The CCSA reiterated that policy uncertainty remains the largest barrier to converting the pipeline into deployed capacity and continues to call on the UK Government to prioritise 2026 delivery milestones and establish a transparent allocation framework for Track 2 and non-cluster projects. The Association highlighted that five major UK CCUS projects have already reached financial close and begun construction, while 27 capture projects have been paused or cancelled since 2023 amid average delays of two years.

> **NES Sales Opportunity:** The CCSA re-anchoring of UK CCUS delivery reinforces the Track 1 supply-chain window remaining open through mobilisation. NES firms with subsea pipeline installation, ROV support, geotechnical, high-integrity welding, coatings, marine coordination and NDT credentials should continue to approach Saipem (Aberdeen and London), Eni CCUS Holding, Wood, Petrofac and Worley procurement. Track 2 positioning (Acorn Peterhead and Viking Humber) remains open through 2027. Aberdeen firms with subsea gas-field decommissioning credentials have directly transferable capability into UK CCUS pipeline installation and storage-well construction.

Track 1 CCS mobilisation continues at HyNet Liverpool Bay and Northern Endurance Partnership (August 2026)

The Liverpool Bay CCS project — the first UK carbon storage project to repurpose existing infrastructure — continues its Crown Estate lease-anchored mobilisation, having entered its formal lease with the Crown Estate in July under Eni CCUS Holding, ahead of a first CO_2 injection scheduled for 2028. Northern Endurance Partnership offshore construction at Hartlepool (Saipem-led 149 km subsea CO_2 pipeline) also continues. NEP has now awarded over £2 billion to more than 260 UK companies. Track 1 first CO_2 injection remains targeted for 2028. Track 2 (Acorn, Viking) awaits final development consent, with Acorn Peterhead expected to reach FID in 2026.

5. Marine & Tidal

UK marine and tidal news pipeline stable during the week to 22 August — EMEC, CorPower and Orbital deliver reference points (August 2026)

The UK marine and tidal delivery pipeline held steady through the week ending 22 August 2026, with continued 2026 reference points from CorPower Ocean's C4 wave energy converter with DNV certification, EMEC Orkney demonstrator deployments, Orbital Marine Power's Fall of Warness tidal work, and continued Marine Energy Wales activity around the Menter Môn Morlais Tidal Demonstration Zone. Marine Energy Council policy engagement continues to focus on Contracts for Difference Pot 2 access and the AR8 Pot 4 mechanism. Recent Minesto (Faroe Islands Dragon 4) production records — while non-UK — continue to support the wider tidal delivery narrative that UK marine-technology capability will export.

> **NES Sales Opportunity:** Marine and tidal remains an adjacent-market opportunity for NES firms with floating platform, mooring, cabling, marine coordination and offshore commissioning credentials. Mocean Energy Edinburgh, CorPower Ocean, EMEC Orkney and Orbital Marine Power remain the priority Scottish engagement points. Keep marine and tidal in monthly sales pipeline reviews — the CfD Pot 2 tidal stream ring-fence is under active review.

6. Geothermal

Cornish Lithium secures £7.2 million DRIVE 35 government grant for Cross Lanes Geothermal Lithium project — UK trade coverage through 14 August (August 2026)

Cornish Lithium was confirmed on 12 August as the recipient of a £7.2 million grant from the UK Government's DRIVE 35 programme to fund drilling and testing at its Cross Lanes Geothermal Lithium Project near Chacewater, Cornwall, with trade coverage continuing through 14 August (New Civil Engineer, iom3, The Business Desk South West). The funding will be match-funded and forms part of a wider £14.5 million programme. Cornish Lithium plans to drill two 2,000 m production wells, operate a Direct Lithium Extraction (DLE) demonstration plant at Cross Lanes and drill an appraisal well at the nearby Baldhu site near Truro. The programme is being delivered by the Department for Business, Innovation, Science and Trade in partnership with the Advanced Propulsion Centre and Innovate UK. Extended reservoir testing will validate sustainable production conditions and assess water reinjection rates, targeting UK critical-minerals security alongside geothermal heat. This is the first UK deep-geothermal lithium project to secure DRIVE 35 backing.

> **NES Sales Opportunity:** The Cross Lanes DRIVE 35 grant unlocks a UK deep-geothermal drilling campaign directly transferable to UKCS wells expertise. NES firms with deep drilling, downhole tools, wireline, cementing, HV electrical, mechanical fabrication, welding, coatings, HSE and integrated well engineering should approach Cornish Lithium procurement (Redruth), APC (Coventry) and Innovate UK immediately. Aberdeen wells and DLE-adjacent process engineering are directly transferable. Cross Lanes is the reference site for UK critical-minerals geothermal build-out and will be a repeat funder for the same capability areas through 2028.

7. Decommissioning

AquaTerra reports record North Sea demand for decommissioning and maintenance services — 150+ personnel offshore (21 August 2026)

Aberdeenshire-headquartered AquaTerra Group confirmed on 21 August that it is delivering more projects simultaneously than at any point in its history, with more than 150 personnel deployed offshore and over 200 equipment kits on hire across the North Sea. Managing director Stephen Taylor described the current levels of demand as "the strongest in the company's history". Current work spans North Sea decommissioning programmes, marine integrity contracts and late-life inspection, repair and maintenance campaigns. AquaTerra is delivering services to operators, Tier 1 contractors, heavy-lift companies and engineering partners, with rising demand for rope access, underdeck access systems, fabric maintenance, conventional and advanced NDT and specialist offshore personnel. The company also announced a strategic partnership with James Fisher in July for integrated global offshore decommissioning services.

> **NES Sales Opportunity:** The AquaTerra record demand statement is the clearest week-to-week NES supply chain confirmation of the NSTA-signalled decommissioning acceleration. NES firms in rope access, underdeck systems, fabric maintenance, advanced NDT, HV electrical isolation, coatings, cathodic protection and rigless intervention should approach AquaTerra Group, James Fisher Offshore, Boskalis Subsea, Well-Safe Solutions and Elemental Energies for framework and sub-contract inclusion this month. Aberdeen-adjacent late-life engineering capacity is directly hireable now.

DeepOcean completes Teal West subsea tieback to Anasuria FPSO — diverless tie-in demonstrates UK late-life extension model (20 August 2026)

DeepOcean announced on 20 August that it has completed subsea construction and tie-in work for Anasuria Operating Company's Teal West development in the UK North Sea, connecting the field to the existing Anasuria FPSO approximately 180 km east of Aberdeen in around 90 metres of water. DeepOcean's scope included installation of a flexible production riser and flowline plus an umbilical connecting the FPSO to the Teal West subsea Christmas tree, and commissioning of the newly installed infrastructure. The tie-in was executed using an ROV and specialised tooling, eliminating the need for diver intervention, using DeepOcean's proprietary tie-in tool for high-pressure flange connections. The development comprises two production wells and one water injection well, with one producer connected via approximately 3 km of subsea flowlines. The project is now onstream and extends the Anasuria host asset's operating life — an in-window UK proof-point for the late-life tieback model that will underpin many UKCS host-asset extensions through 2028.

> **NES Sales Opportunity:** Teal West is a live UK reference case for the tieback-to-existing-FPSO model that NES firms should use as a proof point with Anasuria Operating Company, Ithaca Energy, Adura, Serica Energy and EnQuest. NES firms in ROV tooling, subsea intervention, diverless tie-in, subsea flexible flowline handling, umbilical termination, high-pressure flange connections, subsea Christmas tree engineering, ROV-borne test/commissioning and topsides mod scope should approach DeepOcean Aberdeen, Anasuria Operating Company and Ithaca Energy immediately.

Adura press release welcomes Rosebank consultation conclusion — Ithaca to move into pre-execution mobilisation (17 August 2026)

Adura issued a formal press statement on 17 August welcoming the conclusion of the OPRED public consultation on the £8.7 billion Rosebank oil and gas field, marking a significant regulatory milestone before a formal decision by Energy Secretary Miatta Fahnbulleh. Adura noted that the end of the Rosebank consultation followed completion of the Jackdaw consultation the previous week. OPRED will now consider consultation responses on Rosebank before the ministerial decision. Adura is the 2026 merger of Equinor's and Shell's UK offshore operations and holds Rosebank as operator, with Ithaca Energy as partner. OEUK CEO David Whitehouse called on the Government to "be honest about UK energy demand" in its response, arguing UK production is essential to industrial resilience and net-zero transition (statement widely covered in industry press through 18 August).

NSTA UKCS decommissioning trade-press follow-on continues through 22 August (August 2026)

Trade press coverage of the NSTA's 13 August UKCS Decommissioning Cost and Performance Update and Well Decommissioning Charter continued through the week ending 22 August, with World Oil, Energy Live News and industry LinkedIn analysts consistently returning to three headline figures: record £2.6 billion 2025 UKCS decommissioning spend (£1.3 billion on wells), a backlog of around 500 UKCS wells awaiting final abandonment, and more than 1,000 additional wells expected to require decommissioning over the next five years. Analysts continue to cite a potential 30% cost reduction from switching wellhead removal and P&A campaigns from rig-based to vessel-based delivery. The 17-operator Charter (INEOS Energy Europe, Shell UK, Adura, Eni UK and 13 others) continues to be treated as the industry commitment device to unlock accelerated execution.

8. Hydropower & Pumped Storage

Ofgem LDES Window 1 revised special licence conditions call for input closed at 23:59 on 18 August — autumn awards next (August 2026)

Ofgem's Long Duration Electricity Storage Window 1 revised special licence conditions call for input formally closed at 23:59 on Tuesday 18 August 2026. The Window 1 minded-to portfolio of 16 projects (7,645 MW / 136.9 GWh) includes three Scottish pumped storage schemes — Coire Glas 1,440 MW (SSE Renewables), Loch Kemp 660 MW (Statera Energy) and Earba 1,800 MW (Gilkes Energy) — 11 lithium-ion battery projects, TeesCAES 50 MW compressed-air and Frontier Legacy 65 MW vanadium/zinc flow. Final cap-and-floor awards are expected in autumn 2026. Ongoing licence-condition review areas include Delivery Plan governance, graduated Back Stop Delay Factor, availability target of 92.5% for pumped storage, short-cycling restrictions and P90 cost overrun treatment. The parallel Window 1 minded-to consultation closed on 14 August, so both key Ofgem LDES windows have now closed for the year.

> **NES Sales Opportunity:** With both Ofgem LDES windows now closed, autumn 2026 final awards represent a decade-defining UK pumped storage and Li-ion BESS procurement wave. NES Tier 2/3 firms with HV electrical, mechanical fabrication, hazardous-area electrical, control systems, tunnelling, hydraulic engineering, coatings and high-integrity welding capability should confirm supply-chain Letters of Intent with SSE Renewables (Perth/Aberdeen), Statera Energy and Gilkes Energy this month. Autumn award day will trigger multi-year construction subcontracting rounds through 2032. Additional Scottish schemes outside Window 1 (Balliemeanoch, Loch na Cathrach, Fearna) are candidates for future LDES windows.

SSE Renewables secures consent to double Mullaghfarry BESS duration to 320 MWh in Scotland (18 August 2026)

SSE Renewables secured consent on 18 August to double the storage duration of its Mullaghfarry BESS project in Scotland to 320 MWh. The consent supports SSE's wider UK BESS pipeline and demonstrates continued Scottish grid-storage build-out alongside the LDES Window 1 pumped storage schemes. Longer-duration Scottish BESS is an increasingly relevant complement to pumped storage in providing multi-hour balancing and constraint management, particularly as offshore-wind and onshore-wind build-out continues to lift Scottish curtailment risk.

> **NES Sales Opportunity:** The Mullaghfarry duration doubling is a direct Scottish-market opportunity signal for NES firms in HV electrical, BESS enclosure fabrication, thermal management, fire protection, hazardous-area electrical, cyber-secure control systems, protective coatings, civils and QHSE. Approach SSE Renewables Perth and preferred BESS EPC framework holders immediately.

Arenko Nimbus platform to manage 300 MW BESS co-located with UK offshore wind (19 August 2026)

Arenko announced on 19 August that its Nimbus optimisation platform will manage a 300 MW BESS portfolio co-located with UK offshore wind assets, deepening the operational integration of grid-scale battery storage with UK offshore-wind revenues and constraint management. The move underlines the emerging co-located BESS-plus-offshore-wind delivery model in the UK and creates additional intermediation of Balancing Mechanism revenues alongside CfD offshore wind. Co-located BESS is an increasing feature of AR7- and AR8-era offshore-wind bidding strategy.

Harmony Energy energises 35 MW / 70 MWh BESS in North Yorkshire (20 August 2026)

Harmony Energy energised its 35 MW / 70 MWh BESS project in North Yorkshire on 20 August, adding to the pipeline of UK Li-ion assets reaching commercial operations through H2 2026. The project joins a widening set of UK BESS owner-operators including Zenobe, Fidra Energy, Statera, Frontier, Brockwell Energy, Econergy and Masdar UK. Continued UK BESS financing momentum — European Energy's £58.1 million Danske Bank facility for Indian Queens (12 August, prior window) and NextEnergy UK's 107 MW / 151 MWh acquisition (13 August, prior window) — continues to underpin the delivery pipeline.

9. Policy

Rosebank OPRED consultation closed at midnight on 17 August — Fahnbulleh decision expected within weeks (17 August 2026)

The OPRED public consultation on the £8.7 billion Rosebank oil and gas field closed at midnight on Monday 17 August 2026. Rosebank is operated by Adura (the 2026 Equinor and Shell UK merger vehicle) with Ithaca Energy as partner. The consultation is a court-ordered re-examination of scope 3 emissions climate impact following the Supreme Court's Finch judgment, alongside the Jackdaw gas field consultation which closed the previous week.

OPRED will now consider consultation responses on both projects before the ministerial decision by Energy Secretary Miatta Fahnbulleh, expected within weeks. Fossil Free London protests marked the Rosebank closure. The Adura press release on 17 August called the closure “a major step toward UK Government decision on £10.8 billion North Sea development” (combined value including linked infrastructure). OEUK evidence continued to be widely reported through the week: £28.7 billion of gross value added over the combined Adura fields’ lifespans, £1.4 billion of tax revenues before the end of this Parliament rising to £3.8 billion by 2034.

> **NES Sales Opportunity:** The Rosebank/Jackdaw ministerial decision is the single most consequential UKCS upstream consent decision of 2026 and could land inside the next 4-6 weeks. NES firms should confirm post-consent mobilisation Letters of Intent with Adura (Equinor-Aberdeen), Ithaca and Shell UK frameworks this fortnight across marine, subsea, wells (rigless P&A/intervention), ROV, coatings, cathodic protection and QHSE scope. Approach Aberdeen offices directly. Post-consent supply-chain scale-up will be measured in months, not quarters.

DESNZ Draft Strategic Policy Guidance for Electricity Networks Growth consultation closed 19 August (August 2026)

The DESNZ Draft Strategic Policy Guidance for Electricity Networks Growth (SPG) consultation closed on Wednesday 19 August 2026. The SPG sets forward guidance to Ofgem on RIIO-ED3, RIIO-T3, connection reform and infrastructure investment across the transmission and distribution networks needed to enable AR8-and-beyond offshore wind, CCUS, hydrogen and BESS delivery. It formalises DESNZ direction on Gate 2 connection reform, Reformed National Pricing versus Zonal Grid pricing and constraint management funding. DESNZ Networks Growth is the anchor UK grid policy document for the second half of the decade and will directly shape the workbook for NES firms with substation, HV cable and connection engineering scope through 2030.

> **NES Sales Opportunity:** The SPG closure now moves DESNZ into policy adoption — the next window for NES firms with grid, HV substation, connection, cable and hazardous-area electrical scope is influencing implementing rules through Ofgem RIIO-ED3/T3 workstreams and NESO methodology consultations expected through Q4 2026. Coordinate with Scottish Renewables, RenewableUK and Offshore Wind Scotland trade-body positions on offshore transmission connection acceleration.

Scotland issues Direction on 17 August requiring notification of every new 50 MW-plus data centre (17 August 2026)

The Scottish Government issued a formal Direction on 17 August 2026, signed by Public Finance Minister Hannah Mary Goodlad, requiring Scottish planning authorities to notify Scottish Ministers of every planning application for a proposed new data centre with a power capacity exceeding 50 MW within seven days of validation. The Direction — The Town and Country Planning (Notification of Applications) (Data Centres exceeding 50 MW Power Capacity) (Scotland) Direction 2026 — applies to both new applications and applications currently being considered. The Direction is intended to support strategic oversight of Scotland’s data-centre planning pipeline (estimated at more than 7,100 MW across 20 sites, including Ravenscraig, Coldstream, Auchtertool, Larbert, Hurlford, Hunterston, Newhouse and Chapelhall). Ms Goodlad also recalled a planning appeal relating to a proposed green data centre in Edinburgh, and issued directions requiring Environmental Impact Assessments at locations in Fife and Edinburgh (Auchtertool 600 MW, Wester Hermiston 200 MW). BBC reported the follow-on Lanarkshire application (18 August), and Action to Protect Rural Scotland published a formal letter on 19 August raising Ravenscraig, Coldstream and Chapelhall EIA screening concerns.

> **NES Sales Opportunity:** The 17 August Scottish data-centre Direction is a direct signal that hyperscale grid-connected demand is entering strategic oversight — with immediate read-across for NES firms in HV substation, transformers, protective coatings, structural steel (BHC), diesel/gas backup generation, fire

> protection and hazardous-area electrical. Priority stakeholders now include Apatura (Ravenscraig, Coldstream, Hermiston, West Calder), ILI Group (Auchtertool, Hurlford, Newhouse), Eneus Energy (Hunterston, includes 450 MW onsite BESS), DataVita/HFD Renewables (Chapelhall AI Growth Zone) and DP World (Larbert). Direct approach to DESNZ Nuclear Directorate not relevant here; approach Scottish Government Directorate for Local Government and Planning and named developers.

OEUK statement 18 August calls on UK Government to be honest on energy demand in Rosebank response (18 August 2026)

Offshore Energies UK CEO David Whitehouse issued a formal statement on 18 August calling on the UK Government to "be honest about the UK's energy demand" in its response to the Rosebank consultation. Whitehouse argued that the Government response will "set the direction of the UK's future energy policy, industrial resilience and its route to net zero" and highlighted OEUK evidence on gross value added, tax revenues and supply-chain jobs from continued UKCS production. The intervention aligns OEUK's position ahead of the ministerial decision.

DESNZ CO2 supply resilience call for evidence closed 18 August (August 2026)

The DESNZ call for evidence on domestic CO2 supply resilience closed on Monday 18 August. The call — launched to test policy options after recent UK industrial CO2 shortages — focused on food and drink but has direct read-across for CCUS off-take design, industrial gases and by-product CO2 valorisation. Government response will inform the next stage of UK CO2 market policy and connects to Track 1 and Track 2 CCUS off-take planning.

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
16 Aug – 16 Sep 2026	NESO AR8 qualification assessment window (open)	NESO	Support Tier 1 bid submissions
Aug–Sept 2026 (expected)	DESNZ decision on Jackdaw and Rosebank consents	DESNZ / Fahnbulleh	Confirm post-consent mobilisation LOIs
30 Sep 2026	GBE Supply Chain Fund R3 closes; NSTA Abandonment Fee Rules commence	GBE / NSTA	Submit R3 application if eligible
1 Oct 2026	VAT off electricity bills (Burnham first policy)	UK-wide	Consumer / commercial read-across
7–8 Oct 2026	RenewableUK Floating Offshore Wind Conference 2026	RenewableUK (Aberdeen)	Attend; confirm LOIs with floating developers
28 Oct 2026	Autumn Budget 2026	HM Treasury	Monitor energy tax measures
Autumn 2026	Ofgem LDES Window 1 final cap-and-floor awards	Ofgem	Confirm supply-chain LOIs with pumped storage + BESS developers

Date	Event / Deadline	Location / Body	NES Action
Autumn 2026	DESNZ HAR2 electrolytic hydrogen contract awards	DESNZ	Position with Veri/EnQuest, SP/Storegga, Ineos, Ramboll
Nov 2026 (expected)	DESNZ AR8 Contract Budget Notice	DESNZ	Track pot allocations
27 Nov 2026 – 17 Feb 2027	AR8 results announcement window	DESNZ / LCCC	Prepare post-award mobilisation
H1 2027	Crown Estate Round 6 for NE England 6 GW leasing (targeted)	The Crown Estate	Position with prospective Round 6 developers
H2 2026–28	Great British Energy Nuclear £4.6bn 14-contract pipeline	GBE-Nuclear / Rolls-Royce SMR	Register interest with GBE-Nuclear procurement
2028	Track 1 CCS first CO2 injection at HyNet and NEP	Eni CCUS Holding / NEP	Track construction sub-contract windows
Through 2028	Dogger Bank B and C marshalling at Maraen Port of Nigg	SSE / Maraen	Approach SSE Renewables & Maraen procurement

11. Grant Funding & Support Mechanisms Active This Week

Active UK grant, contract and support windows relevant to NES Tier 2/3 supply chain:

Mechanism	Body / Sponsor	Deadline / Status	NES Relevance
AR8 CfD Allocation Round	DESNZ / LCCC / NESO	Qualification 10 Aug – 16 Sep 2026; results 27 Nov – 17 Feb 2027	Support Tier 1 bids during NESO qualification
Clean Industry Bonus (AR8, all OW)	DESNZ	Payments on delivery	Demonstrate UK content evidence
DRIVE 35 Programme	DBIST / APC / Innovate UK	Cross Lanes £7.2m award confirmed 12 Aug; further calls open through 2026	Position for geothermal drilling and DLE-adjacent work
LDES Cap-and-Floor Window 1	Ofgem	Both windows closed; final awards autumn 2026	Position for Coire Glas, Loch Kemp, Earba, Li-ion BESS
GBE Supply Chain Fund Round 3	Great British Energy	Closes 30 Sep 2026	Submit fabrication / manufacturing bids
GBE-Nuclear £4.6bn commercial pipeline	Great British Energy Nuclear	Contracts across 2026–28	Register interest with GBE-Nuclear procurement

Mechanism	Body / Sponsor	Deadline / Status	NES Relevance
HAR2 electrolytic hydrogen contracts	DESNZ	Awards later in 2026	Position with HAR2 developers (Sullom Voe, Cromarty, Grangemouth)
Track 1 / Track 2 CCS supply chain	DESNZ / Eni CCUS Holding / NEP	Track 1 mobilisation live; Track 2 Acorn Peterhead FID targeted 2026	Approach Saipem, Eni CCUS, Wood, Petrofac, Worley
NSTA Well Decommissioning Charter delivery	NSTA / 17 UKCS operators	Live from 13 Aug 2026; multi-year framework build-out	Rig-to-vessel P&A capability positioning
CfD Pot 2 marine and tidal	DESNZ / LCCC	AR8 open for tidal stream ring-fenced budget	Approach Mocean Energy, CorPower, Orbital, EMEC
NSTA 2nd Offshore CO2 Storage Licensing Round	NSTA	Open through 2026	Position for CO2 storage well/pipeline services

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
East Anglia THREE foundation campaign complete — turbine installation live (17 Aug)	Approach Seaway7, ScottishPower Renewables (Glasgow/Aberdeen), Masdar UK, Iberdrola and Navantia Seanergies for monopile secondary steel, coating, cathodic protection, transition-piece access, dynamic cable pull-in, ROV inspection, marine warranty, guard vessel and marine coordination through end-2026 commissioning and read-across to East Anglia TWO and future AR8 East Anglia scope.	Seaway7; ScottishPower Renewables; Masdar UK; Iberdrola; Navantia	★★★★★
Rosebank + Jackdaw consent (both closed; decision expected weeks)	Confirm post-consent mobilisation Letters of Intent with Adura (Equinor-Aberdeen), Ithaca Energy and Shell UK frameworks across marine, subsea, wells (rigless P&A), ROV, coatings and QHSE scope for immediate mobilisation.	Adura (Equinor); Ithaca; Shell UK; DESNZ/OPRED	★★★★★
SSE Maraen Port of Nigg 180 jobs — Dogger Bank B and C marshalling	Approach SSE Renewables (Perth/Inverness), Maraen and GE Vernova UK on HV electrical, hazardous-area systems, mechanical fabrication (BHC), rigging, structural steel, coatings, quayside civils, marine coordination and QHSE.	SSE Renewables; Maraen; GE Vernova UK	★★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
Ofgem LDES Window 1 both windows closed — autumn awards approach	Confirm supply-chain LOIs with SSE Renewables (Coire Glas), Statera (Loch Kemp), Gilkes (Earba) on HV electrical, mechanical fabrication, tunnelling, hydraulic, coatings and welding. 3,900 MW Scottish pumped storage anchor pipeline. Additional Li-ion BESS engagement with Statera, Zenobe, Frontier.	SSE; Statera; Gilkes; Zenobe; Frontier	★★★★★
AquaTerra record North Sea demand (21 Aug) — late-life & decom acceleration	Approach AquaTerra Group, James Fisher Offshore, Boskalis Subsea, Well-Safe Solutions and Elemental Energies for framework and sub-contract inclusion in rope access, underdeck systems, fabric maintenance, advanced NDT, HV isolation, coatings and rigless intervention scope.	AquaTerra; James Fisher; Boskalis Subsea; Well-Safe; Elemental Energies	★★★★★
DeepOcean Teal West subsea tieback complete (20 Aug)	Approach DeepOcean Aberdeen, Anasuria Operating Company and Ithaca Energy on ROV tooling, diverless tie-in, high-pressure flange, subsea Christmas tree engineering, umbilical termination, flowline handling and ROV-borne commissioning. Model for further UKCS late-life host-asset tiebacks.	DeepOcean Aberdeen; Anasuria Operating Co; Ithaca Energy	★★★★★
NSTA UKCS Decommissioning Charter — rig-to-vessel P&A (follow-on week)	Approach INEOS Energy Europe, Shell UK, Adura and Eni UK on rigless P&A, riserless well intervention, wireline, coiled tubing, well cementing, plug material innovation and integrated well engineering. Vessel-based P&A is a decisive commercial differentiator.	INEOS Energy Europe; Shell UK; Adura; Eni UK; NSTA	★★★★★
Cornish Lithium DRIVE 35 £7.2m Cross Lanes geothermal grant	Approach Cornish Lithium (Redruth), APC and Innovate UK on deep drilling, downhole tools, wireline, cementing, HV electrical, mechanical fabrication, welding, coatings, HSE and integrated well engineering. Aberdeen wells and DLE-adjacent process engineering directly transferable.	Cornish Lithium; APC; Innovate UK	★★★★
Sumitomo/EDF/ESB Gwynt Glas 1.5 GW Celtic Sea floating	Approach EDF power solutions UK/Ireland, ESB and Sumitomo Europe on floating foundation fabrication, mooring, dynamic array and export cable, floating substation electrical, HV commissioning, marine coordination and marine warranty for the 2027–28 pre-consent supplier qualification.	EDF; ESB; Sumitomo Europe; DP Energy	★★★★
Scottish 50 MW+ data-centre notification Direction (17 Aug)	Approach Apatura (Ravenscraig, Coldstream, Hermiston), ILI Group (Auchtertool, Newhouse), Eneus Energy (Hunterston 450 MW BESS), DataVita/HFD (Chapelhall) and DP World (Larbert) on HV substation, transformers, protective coatings, structural steel (BHC), diesel/gas backup, fire protection, hazardous-area electrical.	Apatura; ILI Group; Eneus Energy; DataVita; HFD Renewables	★★★★

Opportunity	NES Supply Chain Action	Contact / Body	Priority
DESNZ SPG Networks Growth (closed 19 Aug)	Move to influencing implementing rules through Ofgem RIIO-ED3/T3 and NESO methodology consultations expected Q4 2026. Coordinate with Scottish Renewables, RUK and Offshore Wind Scotland positions on offshore transmission connection acceleration.	DESNZ; Ofgem; Scottish Renewables; RUK; OWS	★★★★
CCSA re-anchoring UK CCUS delivery (19 Aug)	Approach Saipem (Aberdeen and London), Eni CCUS Holding, Wood, Petrofac and Worley on subsea pipeline, ROV, geotechnical, welding, coatings and marine coordination. Track 1 mobilisation live; Track 2 Acorn Peterhead FID targeted 2026.	Saipem UK; Eni CCUS Holding; Wood; Petrofac; Worley	★★★★
SSE Mullaghfarry BESS duration doubling (18 Aug)	Approach SSE Renewables Perth and preferred BESS EPC framework holders on HV electrical, BESS enclosure fabrication, thermal management, fire protection, hazardous-area electrical, cyber-secure control systems, protective coatings, civils and QHSE.	SSE Renewables Perth	★★★★
Arenko Nimbus 300 MW BESS-plus-offshore-wind (19 Aug)	Approach Arenko and its offshore-wind partners on HV electrical, control-system integration, cyber-secure SCADA and O&M subcontracts. Confirms co-located BESS as an AR8-era bidding model.	Arenko; ScotWind operators	★★★
Harmony Energy 35 MW / 70 MWh BESS energised (20 Aug)	Approach Harmony Energy on ongoing O&M sub-contracts for HV electrical, thermal, fire protection and control-system support. Confirms wider Yorkshire BESS commissioning schedule.	Harmony Energy	★★★
Floating Wind Conference 2026 (7–8 Oct, Aberdeen)	Confirm attendance now. Pre-book meetings with Aker Solutions, Nadara, Green Volt, Cenos, MarramWind, Salamander, Bellrock. Finalise Squid, C-Dart, Krona pitch materials ahead of floating supply chain break-out sessions.	Aker Solutions; Nadara; ScotWind developers	★★★★
UK marine and tidal (CfD Pot 2 tidal stream)	Keep on quarterly sales calendar. Mocean Energy Edinburgh, CorPower Ocean, Orbital Marine Power and EMEC Orkney priority engagement points. Floating platform, mooring, cabling, marine coordination.	Mocean Energy; CorPower; Orbital; EMEC	★★

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