

INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 16 May 2026

Prepared by ExportCentral AI — North East Energy Supply Sector Space

Coverage Period	Audience	Classification
9 – 16 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, geothermal, decommissioning and other offshore renewables.

Executive Summary

This was a landmark week for UK offshore wind policy and consenting, headlined by the **UK Government granting development consent to three new RWE-led offshore wind projects totalling 4 GW** (Dogger Bank South West, Dogger Bank South East and North Falls), the publication of **finalised Clean Industry Bonus contract amendments ahead of AR8**, and a major Crown Estate report confirming offshore wind delivered **nearly 19% of UK electricity in 2025** and that the project pipeline now stands at **93 GW** across operational, under-construction, consented and planned sites.

In floating wind, ORE Catapult launched the **Floating Offshore Wind Centre of Excellence Construction, Operations and Maintenance Programme** on 15 May, and ORE Catapult and the Net Zero Technology Centre stood up the **INTOG Innovation Network** to share lessons across the five Scottish floating pilots ahead of full ScotWind build-out. In hydrogen, **Protium acquired the 15 MW Cromarty green hydrogen project** (and a 70 MW Scottish portfolio) from Storegga — reactivating the last unsigned HAR1 project and pulling Scottish hydrogen back into commercial play.

On the regulatory side, the **Carbon Capture Utilisation and Storage and Offshore Hydrogen Production (Miscellaneous Amendments) Regulations 2026** came into legal focus during the week, extending the established offshore safety-case regime to CCUS pipelines and offshore hydrogen — a direct read-across for Aberdeen oil-and-gas service firms. The **AR8 Clean Industry Bonus application window opened on 13 May and closes 21 May** (no extensions). All-Energy 2026 ran 13–14 May in Glasgow with the Energy Minister and NESO CEO both presenting, and the **OEUK North Sea CCS & Hydrogen Summit (1–2 June, Edinburgh)** is now the next major sector touchpoint.

1. Offshore Wind — Fixed Bottom

UK Approves Three New RWE Offshore Wind Projects — 4 GW Added (15 May 2026)

On **15 May 2026**, Energy Secretary Ed Miliband confirmed development consent for three RWE-led offshore wind farms totalling around **4 GW**: **Dogger Bank South West (1.5 GW)** and **Dogger Bank South East (1.5 GW)** — each a 51/49 JV between RWE and Masdar with AR7 CfDs already in hand and FID targeted in 2027 — and the **North Falls Wind Farm** (RWE/SSE JV, up to 57 turbines and two offshore substations) located approximately 25 miles off East Anglia as an extension of the existing 504 MW Greater Gabbard project. North Falls will refine its

final installed capacity ahead of seeking a CfD in AR8 (now expected to open July 2026). RenewableUK called the decisions “the next milestone for offshore wind in the UK”.

NES Sales Opportunity: Three near-simultaneous consents, all with named JV sponsors and clear procurement runways, create a sharply defined **FEED and tier-1 procurement window through 2026–27** for NES suppliers in monopiles, jackets, transition pieces, secondary steel, subsea cable installation, met-ocean survey and HSE services. The Dogger Bank South projects are the most procurement-ready (AR7 CfD, FID target 2027); North Falls is the most accessible pre-FEED engagement target. Aberdeen contractors should approach RWE's UK supply chain team immediately on all three to be considered for tier-2/3 framework allocations.

Crown Estate Report — Offshore Wind at 19% of UK Electricity, 93 GW Pipeline (13 May 2026)

On **13 May 2026**, The Crown Estate published its latest **UK Offshore Wind Report** confirming that offshore wind delivered **52 TWh in 2025 — around 19% of UK electricity** and enough to power 15.5 million homes. The UK now has **46 fully commissioned offshore wind farms, 2,820 turbines, 42 offshore substations and 16.5 GW of grid-connected capacity**, with 11.7 GW under construction and a **total 93 GW pipeline** (operational, under construction, consented and planned). The report places the UK second only to China globally and ahead of all of Europe.

NES Sales Opportunity: The Crown Estate's 93 GW pipeline figure is now the single most useful supply-chain sizing reference for NES Tier-2/3 firms preparing AR8 capability statements. The data point to use with developers is: **11.7 GW under construction today + 4 GW newly consented this week + AR7's 8.4 GW = ~24 GW of secured-or-imminent projects** that will procure between now and 2029. NES contractors should anchor bid narratives in this near-term volume rather than the abstract 2030 50 GW target.

Clean Industry Bonus Contract Amendments Finalised — AR8 Application Window 13–21 May

DESNZ on **11 May 2026** published its government response to the March 2026 consultation on the Clean Industry Bonus (CIB) contract amendments, finalising three key changes ahead of AR8: **project-level bids, mandatory skills and workforce-protection minimum standards, and payment-on-delivery** linked to commissioning. The 2025 AR7 CIB attracted £204 million of public investment, leveraging up to £3.4 billion of private investment in manufacturing, factories and ports. The **AR8 CIB application window opens 13 May and closes 21 May 2026 (no extensions)**, with AR8 itself opening in July 2026.

NES Sales Opportunity: The shift to **project-level CIB bids and payment-on-delivery** fundamentally changes what AR8 sponsors need from their NES supply base — they must now evidence specific, named UK-content, regional employment and skills commitments project-by-project, not company-wide. NES firms with verifiable Aberdeen/Scottish workforce data, apprenticeship pipelines and decarbonised own-operations evidence should hand-deliver tailored data packs to Bellrock, Muir Mhòr, MarramWind, Outer Dowsing, East Anglia THREE follow-on and the three newly consented RWE projects this week.

2. Floating Offshore Wind

ORE Catapult Launches Floating Offshore Wind Centre of Excellence — Construction, O&M Programme (14–15 May 2026)

On **14–15 May 2026**, the Offshore Renewable Energy (ORE) Catapult publicly launched the fourth strategic programme of its **Floating Offshore Wind Centre of Excellence (FOW CoE)**, focused on **Construction, Operations and Maintenance (COM)**. Scope spans port logistics, substructure assembly, marine spread coordination, dynamic-cable repair, robotic inspection, weather-window decision support and long-distance crew

transfer. The programme is positioned as the bridge between INTOG-scale pilots and full-scale ScotWind build-out from the late 2020s.

NES Sales Opportunity: The new FOW CoE programme is a **formal entry channel for NES marine, port-side and OandM contractors** to embed at pre-FID stage. Aberdeen subsea, ROV, mooring, dynamic-cable, marine survey and crew-transfer firms should engage ORE Catapult's Glasgow team directly to be considered as research and trial partners on COM workstreams. Companies that can pair with INTOG pilot sponsors will gain disproportionate access to ScotWind procurement teams.

INTOG Innovation Network Launched — Shared Learning Across Five Scottish Pilots (13 May 2026)

ORE Catapult and the Net Zero Technology Centre stood up the **INTOG Innovation Network** during the week, operating under their existing Energy Transition Alliance. The network is a single point of contact connecting the **five sub-100 MW Scottish floating wind innovation pilots** awarded exclusivity under Crown Estate Scotland's INTOG round. The stated objective is to identify common technology challenges across the five projects — then channel shared learnings into the larger ScotWind build-out programme.

NES Sales Opportunity: NES suppliers should treat the INTOG Innovation Network as the **lowest-friction route into early-FEED engagement on Scottish floating wind**. Mooring, anchoring, dynamic-cable, environmental-monitoring, met-ocean and substructure-fabrication firms should now request engagement briefings with the network, even where they have no direct sponsor relationship. Cross-pilot learnings will dictate how ScotWind tier-1s award follow-on contracts.

Aberdeen Offshore Wind Farm — ORE Catapult / Vattenfall Test Site Extended to End-2026 (14 May 2026)

A **three-year extension** of the ORE Catapult and Vattenfall partnership at the **96.8 MW Aberdeen Offshore Wind Farm** (2.5 km off Aberdeen) was announced on 14 May, opening the demonstrator to a wider set of innovators through end-2026. The site has hosted what is believed to be the world's first fully remote ROV inspection of an offshore wind farm (Fugro), automated drone blade inspections and uncrewed surface vessel operations. The farm offsets around 134,000 tCO₂ per year and powers ~80,000 UK homes.

NES Sales Opportunity: The extended Aberdeen test-bed is a **direct on-our-doorstep validation platform** for NES innovators in robotic inspection, uncrewed vessels, condition monitoring, blade repair, foundation NDT and HSE digitalisation. Suppliers should approach ORE Catapult's Aberdeen team with concrete trial proposals before end-Q3 2026 — the site is now open to a broader cohort than before.

3. Hydrogen

Protium Acquires Cromarty 15 MW Green Hydrogen Project from Storegga (15 May 2026)

On **15 May 2026**, London-based **Protium** acquired the **15 MW UK Government-backed Cromarty green hydrogen project from Storegga**, alongside a separate 70 MW green hydrogen portfolio in Scotland. The Cromarty project had been halted in 2025 by Storegga and co-developer ScottishPower citing “challenging conditions” and a “limited route to market”. Protium has confirmed the project **retains its HAR1 subsidy support** (Cromarty was selected as part of the £2 billion HAR1 round in 2023) and will not be scaled beyond the initial 15 MW — making this the final HAR1-selected project to move to subsidy agreement. The project was originally designed to scale to a 100 tpd production capacity.

NES Sales Opportunity: Cromarty is the **first live, NES-located, HAR1-supported electrolyser project to have a clear commercial sponsor** since the original Storegga/ScottishPower halt. Aberdeen and Cromarty-area NES contractors in **electrolyser BoP, hydrogen compression and purification, storage vessels, instrumentation, civil engineering and electrical infrastructure** should now engage Protium's technical team directly. The 70 MW separate Scottish portfolio gives Protium a second, larger sponsored programme to engage on — NES firms with proven HAR1-grade documentation should target both simultaneously.

RenewableUK Calls for National Hydrogen Network in Energy Independence Bill (13–14 May 2026)

Following the King's Speech announcement of the Energy Independence Bill, **RenewableUK published its recommended measures** on 13–14 May, calling for legislation to enable a **national hydrogen network** to unlock long-duration energy storage, alongside planning reforms and tax-treatment changes for wind investment. CEO Tara Singh framed the bill as a chance to “cut electricity bills and strengthen energy security by further lowering the cost of building renewables”.

NES Sales Opportunity: A statutory national hydrogen network would directly extend the addressable market for NES hydrogen-pipeline, compression, blending and offtake-integration capability beyond HAR projects. Suppliers should now **document hydrogen-grade pipeline and compression experience** for use in policy submissions during the Bill's passage — and reference the legal framework in proposals to ECC/Acorn/HyNet sponsors over the next 60 days.

4. Carbon Capture, Utilisation & Storage (CCUS)

Offshore CCUS & Hydrogen Safety Regulations Live — Major Accident Hazard Regime Extended (12 May 2026 coverage)

Burness Paull on **12 May 2026** published a detailed sector briefing on the **Carbon Capture Utilisation and Storage and Offshore Hydrogen Production (Miscellaneous Amendments) Regulations 2026** — which came into force **6 April 2026** and integrate offshore CCUS pipelines and offshore hydrogen production into the established UKCS major-accident-hazard safety case regime. Dense-phase CO₂ pipelines are now treated as major accident hazard infrastructure, with duty-holders required to demonstrate risk identification, control and emergency response in line with the existing oil-and-gas framework.

NES Sales Opportunity: The legal extension of the UKCS safety regime to offshore CCUS and hydrogen is a **material competitive advantage for Aberdeen oil-and-gas service contractors**. Firms experienced in safety-case authoring, HAZID/HAZOP, written-scheme-of-examination, PFEER and emergency-response planning can now position those credentials as directly applicable to Track-1 CCUS sponsors (NZT, NEP, Acorn, Viking, Liverpool Bay) and offshore hydrogen developers. Aberdeen consultancies should be issuing capability briefings to ECC, BP, Equinor, TotalEnergies, Storegga and Eni this week.

CCUS Innovation 2.0 — Built Environment Sequestration Competition Opens (13 May 2026)

On **13 May 2026**, DESNZ opened the **CCUS Innovation 2.0 competition** targeting **carbon sequestration in the built environment** — testing technologies that store CO₂ in long-life construction materials, including timber-derived products, mineralisation and other durable carbon-storage routes that complement geological storage. The competition is open to UK-based developers and forms part of the wider Track-2 / post-Track-1 CCUS framework.

NES Sales Opportunity: Although materials-anchored rather than offshore, the competition opens a **parallel innovation funding route** for NES firms with adjacent capability: mineralisation chemistry, sub-surface carbon-storage monitoring and offshore CO₂ transport. Suppliers should target consortia bids that pair built-environment innovators with proven Aberdeen geological-storage expertise to create end-to-end carbon-storage propositions.

5. Marine & Tidal Energy

Tidal Stream and Wave — AR8 Ringfence Lobbying Continues

No major UK tidal-stream or wave-energy project announcements landed in the 9–16 May window. The sector's focus during All-Energy 2026 (13–14 May, Glasgow) was the continued political push for an **enlarged AR8 ringfenced tidal-stream pot** ahead of the July auction opening. EMEC, MeyGen Phase 2 and the Marine Energy Wales pipeline remain the principal UK procurement-ready opportunities. The £15 million UKRI Blue Horizon programme continues to fund multi-device array demonstration work at EMEC Orkney.

NES Sales Opportunity: NES **subsea engineering, mooring, marine-survey and ROV firms** continue to have direct route-to-market through MeyGen Phase 2 and EMEC. Suppliers should treat the next eight weeks as a **political pressure window** on AR8 tidal-stream ringfencing — any uplift announced before the July auction opening will rapidly reshape near-term procurement calendars. Aberdeen ROV firms should now be on the Marine Energy Wales preferred-supplier shortlists.

6. Geothermal

Geothermal Sector — Post-GEL Cornwall Commercial Momentum

Following the previous week's widely-covered Geothermal Engineering Ltd United Downs commercial first in Cornwall, no new project-level UK geothermal announcements were issued during 9–16 May. Sector attention shifted to **All-Energy 2026 in Glasgow (13–14 May)** where geothermal featured in plenary discussions on Scottish deep-heat and mine-water network potential. The **British Geological Survey** UK Geothermal Platform continues to coordinate the technical case for scalable UK deep-geothermal projects, building on the GEL precedent for 5 km drilling depth in granite-bearing zones.

NES Sales Opportunity: The procurement window remains anchored on **GEL's planned ~10 MW Cornwall expansion by 2030** and on Scottish mine-water heat networks across the Central Belt. NES drilling, well-completion, downhole monitoring, brine-handling, ORC-turbine and heat-network integration firms should **treat the lull as a relationship-building window** with GEL, the UK Geothermal Platform and Crown Estate Scotland — the next announced project will be procured rapidly, and pre-qualification ahead of award is the critical differentiator.

7. Decommissioning

Decommissioning — Quiet Reporting Week, Structural Demand Intact

No headline UKCS decommissioning contract awards or NSTA enforcement actions landed in the 9–16 May window. Activity remained anchored on the previously-announced **Apache / Well-Safe Solutions Forties Field multi-year programme** (largest-ever North Sea decommissioning scope). Sector commentary at All-Energy 2026 reinforced the structural picture: £27 billion UKCS spend 2023–2032, £44 billion to fully decommission the remaining UKCS scope, 1,500 wells due for plug-and-abandonment by 2030 and a constrained UKCS rig pool of

just five semi-submersibles. The new **offshore CCUS/H₂ regulations now in force** create regulatory carryover into late-life and end-of-life management of repurposed assets.

NES Sales Opportunity: NES Tier 2/3 firms in **well intervention, casing and tubing, completions, ROV, marine logistics, MODU support and environmental monitoring** should continue to anchor commercial activity in Apache / Well-Safe contract pull-through. The new CCUS-H₂ safety regime extension creates an **immediate add-on sales proposition** where firms can credibly redeploy P&A and late-life-management skills to repurposed asset duty-holders — a category that grows materially as more wells transition from O&G to CCS injectors.

8. Hydropower & Pumped Storage

LDES Cap and Floor — Awaiting Ofgem Outcome Window

No formal Ofgem decision on the LDES cap-and-floor regime landed in the 9–16 May window. Sector positioning continues to centre on the **SSE Renewables Coire Glas (1,300 MW / 30 GWh)** pre-FID, alongside **Earba Storage (1.8 GW)** and the **Statkraft Loch Kemp / Loch na Cathrach** projects. At All-Energy 2026, panel discussion repeatedly highlighted 2026 as the critical political year for resolving LDES financing and triggering Highland-located FIDs in late 2026 / early 2027.

NES Sales Opportunity: The pre-FID positioning window remains open for NES **civil engineering, tunnelling, electrical infrastructure, geotechnical, environmental monitoring and grid-connection specialists**. Coire Glas, Earba and Statkraft procurement teams should be re-engaged in Q2 2026 ahead of cap-and-floor outcome — Highland civil and electrical works represent a multi-year procurement window for Scottish-based firms with cost-competitive logistics access.

NESO — Demand Co-location in Scotland and Whole-System 2050 Plans (14 May 2026)

NESO CEO **Fintan Slye** addressed All-Energy 2026 on **14 May 2026** and toured the UK's largest onshore wind farm at Whitelee. The headline message: locating large electricity users — **especially data centres** — closer to Scottish renewable generation could reduce grid balancing costs and lower long-term bills for GB consumers. NESO is developing strategic plans to 2050 for Scotland and the rest of GB. Julian Leslie (Strategic Energy Planning) and Bridget Hartley (Head of RESP) supported plenary sessions on market reform and data centres.

NES Sales Opportunity: The NESO endorsement of **Scotland-located demand co-location** is a strategic tailwind for NES civil, electrical and grid-integration firms working on data-centre, hydrogen-electrolyser and pumped-storage projects. Suppliers should now reference NESO's framing in proposals to **Scottish data-centre developers and grid-edge sponsors** over the next 60 days — a defensible policy hook for accelerated grid-connection design work.

9. Policy & Regulatory Developments

AR8 Clean Industry Bonus — Application Window Open 13–21 May

The CIB application window for AR8 is now **open and runs until 21 May 2026**, following the 11 May DESNZ publication of finalised contract amendments. The CIB is now the binding commercial gate for the entire AR8-bound wind supply chain. AR8 itself opens in July 2026 with results expected late 2026; analysts anticipate up to 19 projects will seek CfDs.

NES Sales Opportunity: NES Tier 2/3 contractors must finalise their **CIB-aligned value propositions this week**. Bid teams should embed UK-content, regional employment and own-operation decarbonisation evidence in tier-1 sub-contract submissions for Bellrock, Muir Mhòr, MarramWind, Outer Dowsing, East Anglia THREE follow-on and the three newly consented RWE projects immediately. **The 13–21 May window is fixed.**

Berwick Bank Wind Farm Consent Variation — Phased Discharge Application (12 May 2026)

On **12 May 2026**, **Berwick Bank Wind Farm Limited** (an SSE Renewables subsidiary) applied to Scottish Ministers to vary the consent and marine licences granted on 31 July 2025 to allow **phased discharge of conditions for each proposed phase of development** — rather than for the development as a whole — and to correct coordinate discrepancies in the offshore transmission infrastructure licences. The variation supports a phased construction approach for one of the UK’s largest single offshore wind projects.

NES Sales Opportunity: A **phased-discharge consent variation** enables Berwick Bank to procure and FID in stages, which materially increases the number of distinct sub-contract award windows over the project life. NES suppliers should target SSE Renewables’ Berwick Bank procurement team now with phase-specific propositions — the variation effectively **multiplies the procurement entry points** compared with a single-phase award.

Energy Independence Bill — King’s Speech Launch and RenewableUK Recommendations

The **Energy Independence Bill** was announced in the King’s Speech on **13 May 2026**. RenewableUK’s recommended measures (above) include removing avoidable planning delays, changing the tax treatment of wind projects so investment costs can be recovered earlier, and legislating for a national hydrogen network.

NES Sales Opportunity: The Bill’s passage over the next 6–12 months is a structural tailwind for the entire NES supply chain. Firms should engage their MPs and the relevant Bill committees with **NES-specific case studies** on planning timelines, grid-connection delays and Scottish workforce data — contributing to the evidence base raises sector profile and creates direct visibility with DESNZ.

10. Key Upcoming Events for NES Companies

Event	Date	Location	Relevance
AR8 Clean Industry Bonus Application Deadline	21 May 2026	Online (DESNZ)	Final CIB application cut-off (no extensions)
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 context
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
CfD Allocation Round 8 (AR8) Opens	July 2026	Online (DESNZ)	Wind / hydrogen / floating CfD bidding window
Floating Offshore Wind 2026	7–8 October 2026	P&J Live, Aberdeen	RenewableUK floating wind summit

Event	Date	Location	Relevance
SPE Geothermal Energy 2026	Autumn 2026	Aberdeen	SPE Aberdeen geothermal sector event

11. Grant Funding & Support Mechanisms Active This Week

Fund / Mechanism	Value	Deadline	Eligible NES Companies
AR8 Clean Industry Bonus	CfD-linked premium with payment on delivery	13–21 May 2026 window	Fixed-bottom and floating offshore wind developers and tier-1 supply chain partners (UK content, regional jobs)
GBE Supply Chain Fund	Up to £300m capital	10 December 2026	Manufacturers of offshore wind components, cables, foundations, nacelles
Offshore Wind Growth Partnership Industrial Growth Fund	£300k – £25m per project	Rolling	Supply chain firms expanding or building offshore wind manufacturing
ECC NPT Pathfinder Selection Process	Project support	12 June 2026 (EOI 12 May closed)	CCUS project developers and supply chain
CCUS Innovation 2.0 — Built Environment Sequestration	Innovation grant	2026 round open	Carbon-storage innovators incl. mineralisation and monitoring
UK Hydrogen Allocation Round 2 (HAR2)	CfD-style revenue support	Decisions expected mid-2026	Electrolyser integrators, EPC contractors and supply chain for ~765 MW shortlist
LDES Cap and Floor (Ofgem)	Revenue support framework	2026 — outcomes pending	Pumped storage hydro developers and Scottish civil / electrical supply chain

12. Sales Opportunity Summary for NES Supply Chain Companies

Sector	Opportunity	Timing	Priority
Policy / CfD	AR8 Clean Industry Bonus — 13–21 May application window	Urgent	★★★★★
Fixed Wind	Three new RWE consents (Dogger Bank SW/SE + North Falls) — 4 GW FEED & tier-1 procurement	Now–2027	★★★★★
Floating Wind	ORE Catapult FOW CoE Construction-OandM Programme + INTOG Innovation Network engagement	Now	★★★★★
Hydrogen	Protium Cromarty 15 MW reactivation + 70 MW Scottish portfolio	Now–2027	★★★★★

Sector	Opportunity	Timing	Priority
CCUS	Offshore CCUS-H ₂ safety regime — oil-and-gas safety-case capability re-positioning	Immediate	★★★★★
Fixed Wind	Berwick Bank phased-discharge consent variation — sub-contract entry points	Now–2028	★★★★
Fixed Wind	Crown Estate 93 GW pipeline data — AR8 tier-1 bid narratives	Immediate	★★★★
Decommissioning	Apache / Well-Safe Forties Field — sub-contract pull-through	Immediate (2026)	★★★★
Hydropower	Coire Glas / Earba / Statkraft — civil, electrical, grid pre-FID	2026–2029	★★★
Marine / Tidal	EMEC Blue Horizon + MeyGen Phase 2 + AR8 ringfence lobbying window	2026–2028	★★★
Geothermal	GEL Cornwall scale-up to ~10 MW by 2030 + Scottish prospects pipeline	2026–2030	★★★
Policy	Energy Independence Bill — NES evidence into Bill committees	Now–2026	★★★
CCUS	CCUS Innovation 2.0 built-environment competition — consortium bids	2026	★★

This briefing covers the period 9 – 16 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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