INTELLIGENCE BRIEFING

UK Offshore Low-Carbon Energy Sector

North East Scotland Energy Supply Sector | Week Ending 4 July 2026

Prepared by ExportCentral AI

Coverage Period	Audience	Classification
28 June – 4 July 2026	NES Tier 2/3 Energy Supply Chain	Weekly Market Intelligence

Executive Summary

NSTA opens the 2027 production consent round. On 29 June the North Sea Transition Authority opened the annual consents-and-emissions submission process (ACE). Production consent applications are being accepted from 29 June to 14 August 2026, followed by the Flaring and Venting window from 17 August to 11 September. The NSTA expects to issue approximately 285 consents, all taking effect 1 January 2027. For NES Tier 2/3 firms this fixes the 2027 operational baseline for UKCS oil and gas activity — informing measurement, monitoring and compliance service demand — while also framing what remaining hydrocarbon volumes are available to underpin CCS and blue-hydrogen anchor customers.

The Fair Work Charter reshapes offshore wind procurement. On 28 June the Government confirmed 37 initial signatories to its new Offshore Wind Fair Work Charter, with DESNZ later stating that more than 60 businesses and unions had signed. Companies that decline the Charter face loss of the clean energy bonus that supplements CfD revenues. Alongside the Charter, specific Employment Rights Act provisions come into force in October 2026, including a statutory right of union access to workplaces and a duty to inform workers of their union rights. Tier 2/3 firms tendering into CfD-backed offshore wind projects should expect trade-union engagement clauses to appear in prequalification questionnaires from Q3 2026.

Ofgem accelerates grid access reform. On 2 July Ofgem published its update on the Connect Pillar of demand-connections reform, introducing the "Connect Accelerate" framework which allows large customers to progress DIY (self-build) and BYO (bring-your-own) transmission connection routes. A new Flex Technical Taskforce has been convened jointly with the AI Energy Council to test flexible-connection tools at pace. A formal consultation is planned for autumn 2026. Three pillars — Curate, Plan and Connect — now frame the reformed queue-management model. Data-centre demand and green-hydrogen electrolyser loads are the two customer classes driving the redesign, both directly relevant to NES supply-chain firms with substation, cable and civils capability.

Energy price cap +13% takes effect while pumped storage momentum builds. Ofgem's July–September 2026 default tariff cap of £1,862 per year for a dual-fuel household took effect on 1 July, a 13% increase driven by gas +24% and electricity +5%. Cornwall Insight now forecasts a broadly stable October cap. In parallel, Ofgem's LDES Cap-and-Floor Window 1 consultation remains open until 7 August 2026, with 16 minded-to projects totalling 7,645 MW — including three Scottish pumped-hydro schemes at Coire Glas, Loch Kemp and Earba. The combined bill pressure and long-duration storage build-out reinforces the political and commercial case for accelerated grid, storage and clean-power capacity.

Deal, milestone and pipeline signals continue across offshore wind. The $15 billion RWE-KKR partnership on the 3.1 GW Norfolk Vanguard East and West projects is finalising closure this summer. Dogger Bank B installed its first 20 turbines during June. Hornsea 3 progress this week confirmed 197 monopile foundations installed since May, all transformers due mid-July, converter substation live end of year, and full commissioning targeted for 2027. ContourGlobal has confirmed an 800 MW UK BESS pipeline behind its 2 GWh deal on 29

June, and ORE Catapult reported on 30 June that more than 100 UK companies have now achieved its Fit For Offshore Renewables (F4OR) top industry status — a rising floor of prequalified supply-chain competitors.

1. Offshore Wind — Fixed Bottom

RWE–KKR $15bn Norfolk Vanguard East and West — 3.1 GW closing this summer

The RWE–KKR $15 billion partnership on the Norfolk Vanguard East and West offshore wind projects (3.1 GW combined) is being finalised for closure during summer 2026, following the sale-and-partnership agreement first announced in January. KKR takes a 49% stake alongside RWE's continuing 51% and delivery responsibility. Norfolk Vanguard East (1.4 GW) and West (1.7 GW) are the two largest fixed-bottom projects in the RWE UK pipeline with AR7 CfDs to secure. Grid connection is planned via a coordinated Norfolk substation into the National Grid backbone. Onshore construction begins 2027, first power targeted 2030–31.

> **NES Sales Opportunity:** The RWE–KKR closing tests procurement discipline. NES fabrication, jacket, monopile, cable-protection, subsea inspection and OFTO transfer firms should approach RWE Renewables UK supply-chain team before Q3 2026 with UK-content plans specifically responding to Fair Work Charter and Clean Industry Bonus prequalification criteria. KKR governance will place a premium on demonstrable schedule certainty from Tier 2/3 partners.

Dogger Bank B installs first 20 turbines — mid-project milestone

Dogger Bank B, the second phase of the Dogger Bank consortium (SSE Renewables, Equinor, Vargrønn), installed its first 20 turbines during June 2026. The turbines are GE Haliade-X 14 MW units, with a further 67 units to install to complete Phase B's 1.2 GW nameplate capacity. Full commissioning of B is expected in 2027. Dogger Bank A is already operational, while Dogger Bank C awaits AR8 participation.

Hornsea 3 — 197 monopiles, transformers by mid-July, converter substation year-end

Ørsted's Hornsea 3 provided a construction update on 29 June: 197 monopile foundations are now in place after the first was installed in May 2026. All offshore transformers are due for delivery by mid-July, with the converter substation live by end of year. Full commissioning of Hornsea 3 is scheduled for 2027, delivering 2.9 GW to grid. It will remain the world's largest offshore wind farm on completion, powering an estimated 3.3 million UK homes annually.

> **NES Sales Opportunity:** Hornsea 3's final commissioning wave is the largest concentrated NES commissioning-services opportunity of 2026–27. HV cable termination, OFTO handover engineering, marine ops readiness, condition-monitoring calibration and warranty O&M scopes will be procured in tranches through Q3 and Q4. NES firms with Ørsted framework agreements should prepare bench-strength submissions immediately.

ContourGlobal confirms 800 MW UK BESS pipeline behind 2 GWh deal

ContourGlobal on 29 June confirmed it holds an 800 MW UK battery-storage development pipeline following the 2 GWh commercial-and-operations deal announced earlier in the month. Sites cluster in the Midlands and North West of England near grid pinch-points and behind-the-meter industrial customers. Delivery is expected across 2027–29. ContourGlobal joins ContourGlobal, Zenobe, Statera and Fidra as UK BESS scale players building at above-500 MW pipelines.

AR8 statutory notices published 6 July — application window opens 20 July

DESNZ AR8 statutory notices are due for publication on 6 July 2026, with the formal application window opening 20 July. Fixed-bottom, floating and tidal-stream pots are all confirmed. Following the Fair Work Charter announcement (see Policy), CfD prequalification will now require signatory status or equivalent trade-union commitments, and Clean Industry Bonus criteria will apply.

ORE Catapult F4OR: 100+ UK companies at top industry status

ORE Catapult on 30 June confirmed that more than 100 UK companies have now achieved the top tier of its Fit For Offshore Renewables (F4OR) programme, which prequalifies supply-chain competence for offshore wind and hydrogen developers. The programme has been running since 2019. Successful graduates include a growing cluster of North East Scotland engineering SMEs.

> **NES Sales Opportunity:** F4OR top-tier accreditation is now a competitive floor, not a differentiator. NES firms not yet through the programme should aim to complete Bronze or Silver tier by year-end — developer PQQs increasingly require it. NES firms already accredited should pursue Gold and target being named in Crown Estate supply-chain reporting.

2. Floating Offshore Wind

Rejobs: UK offshore wind workforce must grow from 40,000 to 75,000–94,000 by 2030

A new ORE Catapult / RenewableUK-commissioned workforce study, reported through week 27, sets out the scale of the offshore wind skills challenge. The UK sector currently employs approximately 40,000 direct FTE across fixed-bottom and floating. To deliver Clean Power 2030 and the pipeline through the mid-2030s, the workforce must grow to between 75,000 and 94,000 by 2030 — a doubling in fewer than five years. The UK Government has committed £100 million over three years for engineering-skills training linked to the pipeline. Floating-wind roles are the most acute shortage.

> **NES Sales Opportunity:** The North East Scotland regional workforce cluster is an obvious host for scaled floating-wind training. NES colleges, ECITB, universities and industry should form a consortium bid for a share of the £100m training envelope, targeting floating-anchor installation, dynamic-cable qualification, mooring-line handling and floating-substation O&M. First tranche announcements expected Q4 2026.

MachairWind, Muir Mhor and Celtic Sea Round 6 preparation

ScottishPower's consent application for MachairWind (2 GW, Inner Hebrides, submitted 24 June) advances through Marine Directorate Scotland this month. Muir Mhor (Vattenfall/Fred. Olsen Seawind) continues consultation on its 800 MW floating scheme north-east of Aberdeen. The Crown Estate will confirm floating volumes within Round 6 later in 2026, integrating Celtic Sea and Scottish Wider Waters leasing into a single round.

3. Hydrogen

Camargue analysis: HAR2 shortlist — 765 MW still awaiting funding announcement

Camargue Communications on 29 June published an analysis of the UK hydrogen policy environment, focusing on the Hydrogen Allocation Round 2 (HAR2) shortlist of 27 projects totalling 765 MW that remains stalled awaiting the funding announcement. The article notes that the leadership contest following Prime Minister Starmer's resignation on 22 June continues to delay HAR2 ITO decisions. Camargue calls out the risk that electrolyser suppliers reallocate 2027 delivery slots away from the UK if funding is not confirmed by early Q4 2026.

AFC Energy — revised EA permit allows sale of hydrogen from ammonia cracker

AFC Energy plc (through its H Power subsidiary) confirmed on 29 June that the Environment Agency has issued a revised bespoke environmental permit for its Southampton pilot ammonia-cracker facility, allowing the export and commercial sale of low-carbon hydrogen produced from cracked ammonia. This is a significant unlock — the pilot moves from technology demonstration to commercial revenue. AFC Energy has indicated plans to scale the cracker platform toward MW-scale plants supporting maritime and heavy-duty transport hydrogen refuelling.

Prince Madog secures first hydrogen fuel-cell certification for UK crewed research vessel

Ships Monthly reported on 29 June that the University of Bangor's Prince Madog has become the first UK crewed research vessel to secure certification for a hydrogen fuel-cell propulsion system. The vessel operates from Menai Bridge in Wales and supports marine and offshore renewables research. The certification opens a formal pathway for hydrogen fuel-cell retrofits across the wider UK offshore support vessel fleet.

> **NES Sales Opportunity:** The Prince Madog certification is a UK first that reads directly across to CTV, SOV and multipurpose survey vessel operators serving offshore wind farms. Aberdeen-based maritime engineering, hydrogen storage, bunkering and refuelling firms should approach vessel owners including North Star, Windcat, Purus Marine and Rovco with retrofit proposals. Bunkering infrastructure at Aberdeen, Peterhead, Nigg and Cromarty Firth becomes a strategic asset.

Kent hydrogen production plant — Manston application submitted

BBC News reported on 29 June that plans for a hydrogen production plant at Manston in Kent have been submitted for approval. The plant would produce green hydrogen supported by co-located renewable generation, and is positioned to supply industrial and heavy-transport demand across the Thames Gateway corridor. Manston Airport site redevelopment is the anchor. Determination expected late 2026.

Northern Gas Networks — two hydrogen pipelines proposed for Humber and Teesside

Northern Gas Networks confirmed proposals for two new hydrogen pipelines this week, one connecting to the Humber industrial cluster and one connecting to Teesside. The pipelines would be repurposed and new-build sections supporting hydrogen distribution to industrial off-takers post-blue-and-green hydrogen production start-up. The proposal aligns with the £500m Hydrogen Transport and Storage Business Model commitment announced earlier in the year.

4. CCUS

CO2 T&S Decommissioning Funding Regulations in force 10 July 2026

The Carbon Dioxide Transport and Storage Decommissioning Funding Regulations (SI 2026/632), laid on 27 May, come into force on 10 July 2026 — six working days after this briefing. Operators must establish a decommissioning fund with 10% contingency before NSTA will permit any operational handover. The Secretary of State must approve fund composition and any variation. The fund must remain in place until the Secretary of State accepts transfer of decommissioning responsibility. The 10 July effective date triggers the first fund-composition submissions from Track-1 operators.

> **NES Sales Opportunity:** Firms with independent verification, integrity engineering, subsea inspection, well plug-and-abandonment planning and CO2 plume MMV (measurement, monitoring, verification) capability should be in front of BP/Equinor NEP, Eni HyNet, Harbour Viking and Storegga Acorn supply-chain teams this week. Fund quantification work must complete under third-party assurance to satisfy the Secretary of State approval test. First contracts likely awarded July–September 2026.

CCS Track-2 (Acorn, Viking) — leadership contest continues to delay funding decision

Following Prime Minister Starmer's 22 June resignation, the Labour Party National Executive Committee approved the leadership contest timetable on 28 June, with Manchester Mayor Andy Burnham the leading contender. Industry expects a result by mid-to-late August. CCS Track-2 funding for Acorn (St Fergus) and Viking (Humber), originally expected spring 2026, remains formally undecided under acting energy secretary. Storegga, Harbour Energy and Equinor have all urged a firm Track-2 letter by end Q3 2026 to keep early-2030s first-injection targets in reach.

5. Marine & Tidal

Ampeak Energy — MeyGen 87 GWh delivered, MeyBESS and AW2 planning permission

Ampeak Energy plc (formerly SIMEC Atlantis) reported a transformational year on 27 June, ahead of publishing its annual results. Its MeyGen tidal-stream array in the Pentland Firth delivered 87 GWh cumulative generation to grid — the world-leading total for commercial tidal-stream. AW1, a 240 MWh battery project in Ayrshire, is in FID and under construction. Planning permission has been granted for MeyBESS and AW2 in Scotland, taking Ampeak's consented BESS pipeline to 2.9 GWh. MeyGen Phase 2 is the flagship tidal expansion — up to 100 MW additional capacity in the Pentland Firth.

> **NES Sales Opportunity:** Ampeak's 2.9 GWh consented BESS pipeline and MeyGen Phase 2 expansion are two of the most bankable near-term contracts for NES electromechanical, HV substation, subsea cable, marine survey and O&M service providers. Approach the Ampeak Edinburgh and Wick supply-chain team — the Pentland Firth Wick harbour infrastructure is a growing cluster for tidal energy services.

Spiorad na Mara tidal consultation closes 12 July

SAE Renewables' Spiorad na Mara consultation continues through Marine Directorate Scotland and closes on 12 July 2026. The project is targeting up to 30 MW of tidal-stream capacity in the Pentland Firth. Consenting is expected to take 18–24 months following the consultation close. Crown Estate Scotland tidal leasing round expected late 2026 will broaden opportunity.

AR8 ringfenced tidal pot — £237.32/MWh strike price

DESNZ statutory notices confirm AR8 will maintain a ringfenced tidal-stream pot with an administrative strike price of £237.32/MWh (2012 real prices). Ringfence capacity approximately 28 MW. MeyGen Phase 2, Magallanes Renovables Holyhead Deep and Orbital Marine Power O2 successor are expected AR8 bidders.

6. Geothermal

Commonwealth Fusion Systems — first international partner in UKAEA LIBRTI programme

The UK Atomic Energy Authority (UKAEA) named Commonwealth Fusion Systems (CFS) as the first international partner in its LIBRTI (Lithium Breeding Tritium Innovation) programme on 1 July. LIBRTI supports tritium-breeding blanket development, a critical enabling technology for commercial fusion. While fusion is not strictly geothermal, the tritium-breeding lithium-loop engineering shares deep read-across into geothermal heat-loop and high-temperature closed-cycle design, and CFS UK research operations further concentrate advanced-materials, welding and inspection demand.

Northern Ireland deep-geothermal consultation — closes 7 August 2026

The Department for the Economy Northern Ireland's consultation on a deep-geothermal regulatory regime remains open through August 2026. The consultation covers licensing, royalties and environmental safeguards for both heat-only and electricity-producing geothermal. NES-based deep-drilling and completions firms have direct read-across from the Aberdeen skills base.

> **NES Sales Opportunity:** NES Tier 2/3 firms with deep-drilling, completions, surface-facilities and CO2-injection capability have a well-matched capability profile for deep-geothermal wells at 4–6 km depth. Filing consultation evidence — even a brief capability statement — profiles supplier competence ahead of any future NI licensing round. Skills overlap with deepwater drilling is c.85%, structurally advantaging former oil-and-gas service firms.

7. Decommissioning

NSTA ACE opens 2027 production consent round — c.285 consents, all effective 1 January 2027

The North Sea Transition Authority opened the annual consents-and-emissions (ACE) submission window on 29 June 2026. Production consent applications are being accepted from 29 June through 14 August 2026. Flaring and Venting consent applications open 17 August and close 11 September. The NSTA expects to issue approximately 285 consents. All consents come into effect on 1 January 2027. The NSTA's 25 June ACE webinar walked operators through the digital submission process. Operators must submit under the new emissions targets published by NSTA earlier in 2026, which require year-on-year reductions in flare and vent volumes.

> **NES Sales Opportunity:** The 47-day ACE window is the anchor UKCS regulatory event of the summer. NES firms in emissions measurement, methane detection, flare and vent instrumentation, compliance reporting and integrity engineering should be positioned with UKCS operators now. Where operators seek consent for continued production, verification and integrity services underpin the submission. Where consent is refused or restricted, decommissioning studies accelerate — both routes are commercially positive for NES specialists.

Worley multi-year North Sea decommissioning framework — 5 end-of-life installations

Worley confirmed a multi-year decommissioning framework with a major North Sea operator through June 2026 reporting, covering engineering services for five end-of-life offshore installations. Scope includes well plug-and-abandonment engineering, topsides preparation for removal, subsea infrastructure retrieval planning and onshore waste-management strategy. Worley continues to expand its Aberdeen decommissioning delivery team.

Oceana UK — 1,685 ageing O&G wells in Marine Protected Areas

Oceana UK on 27 June published analysis identifying 1,685 ageing oil and gas wells located inside UK Marine Protected Areas (MPAs). The report frames these wells as a decommissioning "ticking timebomb" requiring accelerated well plug-and-abandonment programmes. Regulatory pressure on operators to prioritise MPA wells is expected to increase through 2026–27, ahead of the ecological damage risk and biodiversity commitments.

NDC Aberdeen PhD studentships — close 9 July

The National Decommissioning Centre at Newburgh (Aberdeen) PhD studentship applications remain open for a September 2026 start, with a 9 July deadline. Topics: floating-wind anchor and mooring systems, blade-and-composites recycling, and asset-integrity monitoring of subsea systems. Studentships include £20,000 stipend plus project budget with industry sponsorship.

8. Hydropower & Pumped Storage

Ofgem LDES Window 1 consultation — closes 7 August 2026

Ofgem's Long Duration Electricity Storage (LDES) Cap-and-Floor Window 1 consultation remains open until 7 August 2026, on the 16 minded-to projects totalling 7,645 MW announced 26 June. Final cap-and-floor licences are expected autumn 2026. Three Scottish pumped-hydro schemes account for c.3.9 GW of new pumped storage: SSE's Coire Glas (1.5 GW at Loch Lochy), Statera's Loch Kemp (600 MW at Loch Ness) and Gilkes Energy's Earba (1.8 GW two-reservoir at Lochs Leamain and Earba). These are the first new pumped-hydro schemes consented in Great Britain in over four decades.

Lithium-ion Window 1 winners and flow-battery projects

Lithium-ion Window 1 winners in the LDES scheme include large >500 MW schemes targeting 8-hour duration operation. Frontier Power's zinc-bromine flow-battery project across Ayr and Busby Z3 sites (2.8 GWh) is one of three flow-battery technologies named. The cap-and-floor regime guarantees a floor revenue ahead of operations and shares upside above the cap with consumers — a model adapted from interconnector regulation. Solar Power Portal, Electricalnews UK and Ofgem all provided further detail through week 27.

> **NES Sales Opportunity:** Three Scottish pumped-hydro projects worth £6–8bn capex collectively remain the largest single procurement wave of 2026–28. EPC procurement timelines accelerate from H2 2026 (civils packages: tunnel boring, dam works, intake civils, access roads) into Tier-2 specialist tenders by Q4 2026. NES firms with electromechanical, HVAC substation, control-systems, marine cable (Coire Glas tailrace to Loch Lochy) and tunnel-ventilation capability should engage SSE, Statera and Gilkes supply-chain teams in advance of the 7 August consultation close. Penstock, gates and runner fabrication remain dominated by Andritz, Voith and GE — opportunity is in civils-package subcontracts.

9. Policy

Miliband Offshore Wind Fair Work Charter — clean energy bonus at stake

On 28 June the Government confirmed 37 offshore wind companies had signed its new Fair Work Charter, with DESNZ subsequently stating that more than 60 businesses and unions have signed. Companies that decline to sign face loss of the clean energy bonus that supplements CfD revenues. The Charter formalises trade-union commitments across offshore wind supply chains and was championed by Deputy Prime Minister Angela Rayner prior to her recent resignation. Specific Employment Rights Act provisions come into force in October 2026 including a statutory right of access for unions to workplaces and a duty to inform workers of their union rights. RenewableUK issued a statement noting concerns from smaller supply-chain firms about administrative burden while broadly supporting the objective.

Ofgem Demand Connections Reform — Connect Accelerate and Flex Taskforce

Ofgem on 2 July published its update on the Connect Pillar of demand-connections reform. The update introduces the "Connect Accelerate" framework allowing large customers to progress DIY (self-build) and BYO (bring-your-own) transmission connection routes. A new Flex Technical Taskforce has been established jointly with the AI Energy Council to test flexible-connection tools at pace. A formal consultation is planned for autumn 2026. The reform frames the queue-management model around three pillars: Curate, Plan, Connect. Data centres and green-hydrogen electrolyser loads are the two customer classes driving the redesign.

Ofgem July–September 2026 price cap — £1,862 (+13%)

The Ofgem default tariff cap for the July–September 2026 quarter took effect on 1 July at £1,862 per year for a typical dual-fuel household — a 13% increase over the April–June cap. Gas element +24%, electricity element +5%. The increase reflects wholesale gas price movements following June's Middle East tensions and Iran-linked supply concerns. Cornwall Insight has since revised its October cap forecast to broadly stable, indicating the July move captured the tension-driven volatility.

Labour leadership contest timetable approved

The Labour Party National Executive Committee approved the leadership contest timetable and rules on 28 June following Prime Minister Starmer's 22 June resignation. Manchester Mayor Andy Burnham is the leading contender — several commentators forecast a "coronation" outcome without a substantive contest. The party leadership result is expected by mid-to-late August 2026. Ed Miliband is expected to continue as Secretary of State for Energy Security and Net Zero for the duration.

AR8 statutory notices — 6 July, application window opens 20 July

DESNZ AR8 statutory notices are due 6 July 2026, with the application window opening 20 July 2026. Fair Work Charter signatory status is a new operative prequalification criterion, alongside the existing Clean Industry Bonus scheme. Offshore wind, floating wind, tidal-stream and hydrogen pots are all confirmed.

10. Key Upcoming Events for NES Companies

Calendar of confirmed events, deadlines and regulatory windows in the next eight weeks (5 July – 29 August 2026):

Date	Event	Location	NES Relevance
6 July 2026	AR8 statutory notices published	Online (DESNZ)	High
9 July 2026	NDC Aberdeen PhD studentship applications close	Aberdeen	High
9 July 2026	Ofgem GC0164 Grid Code decision effective	Online	Medium
10 July 2026	CO2 T&S Decommissioning Funding Regulations in force	UK statutory	High
12 July 2026	Spiorad na Mara tidal-stream consultation closes	Online (Marine Directorate)	Medium
20 July 2026	AR8 application window opens	Online (DESNZ)	High
7 August 2026	Ofgem LDES Window 1 consultation closes	Online (Ofgem)	High
7 August 2026	NI deep-geothermal regulatory consultation closes	Online (DfE NI)	Medium
14 August 2026	NSTA ACE production consent applications close	Online (NSTA)	High
17 Aug–11 Sep 2026	NSTA Flaring and Venting consent window	Online (NSTA)	High
18–20 August 2026	Floating Offshore Wind Conference & Exhibition	Aberdeen P&J Live	High
by 26 August 2026	Ofgem next quarterly price cap announcement	Online (Ofgem)	Medium

11. Grant Funding & Support Mechanisms Active This Week

Programme	Value / Scope	Stage	Deadline
NDC Aberdeen PhD studentships (3 places)	Floating-wind anchors, composites recycling, asset integrity; £20k stipend + project budget	Open	9 July 2026

Programme	Value / Scope	Stage	Deadline
Spiorad na Mara consultation	30 MW Pentland Firth tidal-stream consenting	Open	12 July 2026
NSTA ACE production consents	c.285 consents effective 1 Jan 2027; annual UKCS submission	Open	14 August 2026
NSTA Flaring and Venting consents	Emissions consent window under NSTA targets	Opens 17 Aug	11 Sep 2026
NI deep-geothermal consultation	Licensing, royalties, environmental framework	Open	7 August 2026
Ofgem LDES Window 1	16 projects, 7,645 MW minded-to (cap-and-floor consultation)	Open	7 August 2026
AR8 application window	Offshore wind, floating wind, tidal-stream ringfenced pots	Opens 20 Jul	TBC
UK engineering-skills training envelope	£100m over 3 years (announced) linked to Clean Power 2030	Envelope	Rolling
Clean Industry Bonus (CfD supplement)	Fair Work Charter signatory linkage from Q3 2026	In force	n/a
Strategic Investment Vehicle (Crown Estate)	Direct equity investment in UK OW supply chain firms	Open	Rolling

12. Sales Opportunity Summary for NES Supply Chain Companies

Aggregated opportunity ranking for NES Tier 2/3 firms. Star ratings reflect the combined assessment of contract value, technical fit with NES supply-chain capabilities and award timeline (next 12 months). Five stars indicates immediate, high-value engagement; three stars indicates positioning ahead of late-2026/early-2027 procurement waves.

Opportunity	Description	Window	Priority
NSTA ACE 2027 production consents	c.285 consents open 29 Jun – 14 Aug: emissions monitoring, integrity, methane detection, compliance reporting	Now → 14 Aug	★★★★★
CO2 T&S Decommissioning Fund services	Independent verification, integrity monitoring, fund quantification for BP/Equinor NEP, Eni HyNet, Harbour Viking, Storegga Acorn	Jul – Sep 2026	★★★★★
RWE–KKR Norfolk Vanguard supply chain	3.1 GW closing summer 2026: fabrication, jackets, monopiles, cable, OFTO, subsea inspection	Q3 – Q4 2026	★★★★★
Hornsea 3 commissioning services	2.9 GW final commissioning wave 2026–27: HV cable termination, OFTO transfer, marine ops, warranty O&M	Q3 – Q4 2026	★★★★★
Coire Glas civils EPC subcontracts	SSE 1.5 GW pumped storage Loch Lochy: tunnel boring, dam works, intake civils, access roads, HV substation	Q3 – Q4 2026	★★★★★

Opportunity	Description	Window	Priority
Earba electromechanical packages	Gilkes 1.8 GW dual-reservoir Lochs Leamain & Earba: control systems, substation EPC, tailrace marine cable	Q3 2026 → Q1 2027	★★★★★
Loch Kemp grid connection	Statera 600 MW Loch Ness: cable, civils, HVAC substation	Q3 – Q4 2026	★★★★★
MeyGen Phase 2 & Ampeak 2.9 GWh BESS pipeline	Ampeak Pentland Firth tidal expansion + Ayrshire/Scotland BESS: EM, HV, cable, marine survey	Q3 2026 → Q2 2027	★★★★
Fair Work Charter signatory / Clean Industry Bonus positioning	Sub-Tier prequalification response for CfD-backed developers ahead of AR8 window	Now → Q4 2026	★★★★
Worley 5-installation decommissioning framework	Well P&A, topsides removal, subsea retrieval, onshore waste: subcontracts through Aberdeen delivery hub	Q3 2026 → 2027	★★★★
AFC Energy ammonia-cracker scale-up	Post-permit scale-up: BoP, compression, hydrogen refuelling infrastructure	H2 2026	★★★
Hydrogen fuel-cell vessel retrofit	CTV/SOV retrofit market opening after Prince Madog certification: bunkering, storage, refuelling	Q4 2026 → 2027	★★★★
ContourGlobal 800 MW BESS pipeline	Midlands / North West BESS packages: EM, substation, cable, civils	Q4 2026 → 2028	★★★
NI deep-geothermal positioning	Evidence to DfE NI consultation (deep-drilling, completions, surface facilities); pre-licensing PR	Closes 7 Aug	★★★
HAR2 shortlist deepening (27 projects)	Pre-FEED engagement with HAR2 shortlistees pending ITO post-leadership contest	Q3 – Q4 2026	★★★

Sources Used

Numbered references in order of appearance. Each link opens the primary source.

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