Decommission®

Beyond Industries: The Next Chapter of Decommissioning

AN ANNUAL REPORT



decommission.net

CONTENTS

WELCOME
AND THE EXECUTIVE TEAM 3

DECOMMISSIONING:
THE STATISTICS 4

MARKET PERSPECTIVE
SAM LONG, CEO, DECOM MISSION 5-6

DELIVERING VALUE THROUGH INSIGHT, CONNECTIONS AND OPPORTUNITY
CALLUM FALCONER, OPERATIONS DIRECTOR, DECOM MISSION 7-8

A SHARED JOURNEY 9

DECOMMISSIONING AS PART OF A THRIVING UK ENERGY SECTOR
DAVID WHITEHOUSE, CEO, OFFSHORE ENERGIES UK 10-11

LEARNING FROM EXPERIENCE TO SHAPE THE FUTURE OF OFFSHORE WIND DECOMMISSIONING
PATRICK RAINEY, TEAM LEAD INSTALLATION LOGISTICS MANAGEMENT, RWE 12-13

COLLABORATION AS A CATALYST FOR INNOVATION
MELANIE BROWNRIDGE, CHIEF R&D OFFICER, NUCLEAR DE-COMMISSIONING AUTHORITY 14-15

BOARD COMMENTARY
GARETH JONES, CHAIRPERSON, DECOM MISSION 16-17

OUR BOARD 17

THANKS TO INDUSTRY PARTNERS 18

WELCOME

It has been another year of change across the energy landscape. Market conditions remain challenging in some areas, particularly in the UK, while elsewhere we are seeing growing decommissioning activity and new opportunities emerge. Against that backdrop, Decom Mission continues to evolve too, listening to our members, adapting our offering and making sure our work reflects the challenges and opportunities they are seeing across oil and gas, nuclear, renewables and the wider energy transition.

Spending time with our members and the stakeholders shaping these markets remains one of the most valuable, and enjoyable, parts of what we do. From our work on circularity to our involvement with the North Sea Futures Board and Energy Infrastructure Mission Board, these conversations reinforce something I strongly believe: **what we do counts.** The knowledge, experience and capability within our membership has value across the energy landscape, and our role is to help connect that expertise with the people, projects and opportunities where it can make a difference.

Thank you to our members, partners and stakeholders for your continued support and engagement. I hope you enjoy reading this report and, as always, if there is anything Decom Mission can do to support you or your organisation, please get in touch with me or the team. We are always happy to help.

Sam Long
Chief Executive Officer

EXECUTIVE TEAM



Sam Long
CEO
sam.long@decommission.net



Callum Falconer
Operations Director
callum.falconer@decommission.net



Kate Glass
Management Accountant
kate.glass@decommission.net



Yvonne Allan
Marketing and Communications Lead
yvonne.allan@decommission.net



Morag Young
Membership Lead
morag.young@decommission.net



Dana Smith
Events Lead
dana.smith@decommission.net



Caroline Taylor
Projects Lead
caroline.taylor@decommission.net

INTERNATIONAL

$6.94bn
is the estimated global oil & gas decommissioning market in 2025, predicted to grow to **$10.27bn** by 2030

OFFSHORE DECOMMISSIONING GLOBAL MARKET REPORT, SEPTEMBER 2026

200 reactors
are expected to begin decommissioning by 2050

IAEA BULLETIN, APRIL 2023

25 years
is the average expected working life of an offshore wind turbine

SPINERGIE, 2026

NUCLEAR

19 sites
is the number of sites the NDA is responsible for decommissioning across the UK, representing one of the largest decommissioning programmes in Europe.

GOV.UK, 2026

£4bn UK market
with continued demand for innovation, specialist capability and cross-industry expertise

DECOM MISSION MARKET INTELLIGEMCE, 2026

70 tonnes of waste were retrieved from the Magnox Swarf Storage Silo at Sellafield during 2025/26, helping reduce some of the estate's most complex legacy hazards.

GOV.UK, 2026

OIL & GAS

£43.4bn is the estimated remaining cost of decommissioning the UK Continental Shelf.

NSTA, 2026

£21bn is the forecast decommissioning expenditure expected to be incurred between now and 2032, representing almost half of all remaining UKCS decommissioning.

NSTA, 2026

500+ wells are inactive and currently awaiting final abandonment, with more than 1,000 additional wells forecast to require decommissioning over the next five years.

NSTA, 2026

RENEWABLES

96.4GW UK offshore wind project pipeline, representing one of the largest future offshore energy programmes in Europe.

RENEWABLE ENERGY MAGAZINE, 2026

15.6GW is the current UK operational offshore wind capacity, the largest installed base in Europe.

ENERGYGLOBAL.COM, 2026

2027 - 2031 Scroby Sands, one of the UK's earliest commercial offshore wind farms, is scheduled to enter end-of-life activity marking the beginning of large-scale offshore wind decommissioning in the UK.

RENEWABLE ENERGY MAGAZINE, 2026

MARKET PERSPECTIVE

Sam Long, Chief Executive Officer, Decom Missiom

The statistics presented in this report tell a compelling story. Decommissioning is no longer a niche market defined by the retirement of ageing oil and gas assets. It is evolving into a multi-industry, international opportunity that sits at the intersection of energy security, sustainability, innovation and industrial capability.

On the UK Continental Shelf alone, an estimated £43.4 billion remains to be spent on decommissioning, with £21 billion forecast to be invested by 2032. More than 500 wells are currently awaiting final abandonment, underlining both the scale of the challenge and the long-term demand for specialist expertise, technology and services.

At the same time, the UK's renewables industry continues to expand rapidly. With a development pipeline of 96.4GW, operational offshore wind capacity already standing at 15.6GW, and the first generation of projects approaching end-of-life activity, a new decommissioning market is beginning to emerge. Projects such as Scroby Sands are providing an early indication of the opportunities that lie ahead, as developers seek to establish safe, efficient and commercially viable approaches to asset retirement and repowering.

The nuclear industry provides a further dimension. The Nuclear Decommissioning Authority estate spans 19 sites and represents one of Europe's largest decommissioning and remediation programmes. The scale, complexity and duration of these programmes continue to drive demand for innovation, collaboration and specialist capability, many of which have direct application across other industries.

Importantly, these markets should not be viewed in isolation. Increasingly, the same organisations, technologies and skills are being applied across oil and gas, nuclear and renewables. Challenges around waste management, late-life asset strategy, environmental stewardship, logistics, recycling, automation and cost reduction are creating opportunities for businesses to transfer expertise between industries and develop new value propositions.

Beyond the UK, the opportunity is even more significant. International forecasts suggest the global offshore decommissioning market will continue to grow strongly over the coming decade, while the International Atomic Energy Agency estimates that several hundred billion dollars will be spent on nuclear decommissioning worldwide by 2050. As more countries confront the realities of ageing infrastructure and asset retirement, demand for proven decommissioning expertise will only increase.

For Decom Mission, these trends reinforce the importance of maintaining a genuinely cross-industry outlook. Our members increasingly operate across multiple markets, applying knowledge gained in one industry to challenges in another. The role of Decom Mission is to help accelerate those connections, provide insight into emerging opportunities and ensure that the collective expertise of our network remains at the forefront of an evolving global industry.

The statistics presented here are more than measures of market size. They are indicators of a sector entering its next phase of development. One defined not by individual industries operating separately, but by collaboration, innovation and the transfer of knowledge across the wider energy landscape.









DELIVERING VALUE THROUGH INSIGHT, CONNECTIONS AND OPPORTUNITY

Callum Falconer, Operations Director, Decom Mission

Decommissioning is evolving. Activity is growing across oil and gas, nuclear and renewables, while international markets are creating new opportunities for UK expertise. Our role is to help members understand where those opportunities exist and how they can position themselves to benefit from them.

Everything we do is built around three core principles: insight, connections and opportunity.

Our events programme remains at the heart of what we do. Throughout the year, we have delivered technical workshops, market briefings, networking events and Decom Week. This has created opportunities for members to share expertise, learn from industry peers and build relationships that support business growth.

Alongside our events programme, we continue to invest in initiatives that strengthen both individual capability and organisational growth. The Energy Leadership Exchange has provided opportunities for people at every stage of their career to develop new skills, broaden their networks and gain a wider understanding of the challenges and opportunities shaping the energy sector.



International engagement has also been a major focus. Our partnership with FINDES continues to strengthen links between the UK and Brazil, helping members explore one of the world's most significant emerging decommissioning markets. Participation at ROG.e provided a valuable platform to engage directly with operators, supply chain companies and industry stakeholders, while reinforcing the position of UK expertise within the Brazilian market.

Building on that relationship, we launched the Decom Solutions Portal in partnership with FINDES. The platform creates a direct route for Brazilian operators and project owners to connect with UK capability, while providing members with greater visibility of opportunities emerging within Brazil. It is a practical example of how Decom Mission is helping members access international markets and develop new commercial opportunities.

A key focus throughout the year has been our Deep Dive programme. By spending time within member organisations, we develop a detailed understanding of their business, capabilities and growth ambitions. This allows us to combine our market intelligence, industry knowledge and network with a member's own objectives, providing tailored advice on market opportunities, commercial positioning and future growth.

The process delivers value in both directions. Members gain insight and support that is relevant to their specific business, while we strengthen our understanding of the expertise and capability that exists across the Decom Mission network.

Providing members with access to high-quality market intelligence remains another important part of our work. Through our partnership with the Energy Industries Council (EIC), we have delivered targeted reports and analysis that help members better understand project pipelines, market trends and opportunities across both established and emerging industries.

Taken together, these activities reflect what Decom Mission exists to do: provide insight, create connections and help members access opportunities.

As decommissioning continues to develop across industries and geographies, our focus remains clear: ensuring our members have the knowledge, relationships and support they need to grow, diversify and succeed.









A SHARED JOURNEY

Decommissioning is no longer a conversation confined to a single industry.

Across oil and gas, renewables and nuclear, organisations are facing many of the same challenges: maintaining capability, developing supply chains, navigating evolving regulatory frameworks and finding new ways to deliver projects safely, efficiently and sustainably.

As these industries progress through different stages of asset life cycles, the value of sharing knowledge, experience and lessons learned has never been greater.

At Decom Week, leaders from across the energy landscape came together to explore the opportunities that collaboration can unlock.

In this series of interviews, they share their perspectives on how cross-industry working, innovation and collective expertise can help shape the future of decommissioning and strengthen the UK's position as a global leader in the field.









DAVID WHITEHOUSE

CEO, Offshore Energies UK

Decommissioning as part of a thriving UK energy sector

A recurring theme throughout Decom Week was the importance of viewing decommissioning as part of a broader and increasingly interconnected energy landscape. As the UK continues to balance energy security, economic growth and decarbonisation, decommissioning is becoming an essential component of the country's long-term energy strategy.

Speaking at Decom Week 2026, Offshore Energies UK Chief Executive David Whitehouse emphasised the need to move beyond traditional industry divides and recognise the role that decommissioning plays alongside oil and gas production, renewable energy development and nuclear expansion.

Whitehouse argued that the UK's success will depend on maintaining a vibrant domestic energy sector that supports the full asset lifecycle. This, he suggested, not only creates opportunities at home but also strengthens the UK's ability to export expertise, technology and services to international markets.

He also challenged the tendency to frame energy discussions as competing priorities, whether between renewables and oil and gas, economic growth and net zero, or production and decommissioning. Instead, he highlighted the value of a joined-up approach that recognises the contribution each industry makes to delivering the UK's energy future.



For the decommissioning community, Whitehouse's message was ultimately one of confidence. With a significant pipeline of projects ahead and an internationally respected supply chain, he stressed the importance of creating certainty around future activity, enabling businesses to invest, build capability and demonstrate UK leadership on a global stage.

"We've got a way of demonstrating to the international energy sector that the UK leads the world, and actually what the industry now needs to do is make sure that pipeline of projects is real, those projects are executable, and that people can invest on the basis of them."

This perspective reinforced one of the key messages to emerge from Decom Week: decommissioning is not a standalone industry challenge, but a vital part of a wider energy system that depends on collaboration, investment and long-term confidence.



PATRICK RAINEY

Team Lead Installation Logistics Management, RWE

Learning from experience to shape the future of offshore wind decommissioning

As offshore wind projects mature and the first generation of commercial-scale assets approaches retirement, the renewable energy industry is beginning to address many of the challenges that have long been familiar to the oil and gas industry. This presents a significant opportunity to apply decades of decommissioning knowledge, experience and innovation to a new generation of projects.

Speaking at Decom Week 2026, Patrick Rainey, Team Lead Installation Logistics Management at RWE, highlighted the importance of knowledge transfer between industries and the value of engaging with the established decommissioning community as the renewables industry prepares for large-scale decommissioning activity.

For Rainey, one of the strongest drivers for collaboration is the opportunity to learn from the successes and challenges experienced across oil and gas decommissioning, avoiding the need to repeat lessons that have already been learned.

At the same time, he pointed to the scale of the opportunity emerging within offshore wind. With projects such as Scroby Sands expected to be among the UK's first commercial-scale offshore wind decommissioning programmes, the industry is entering largely uncharted territory. New approaches, evolving regulatory frameworks and innovative delivery models will all be required to support successful project execution.



Rainey emphasised that no single organisation holds all the answers. Instead, success will depend on bringing together specialist expertise from across the decommissioning supply chain and fostering strong relationships built on trust, collaboration and shared objectives.

"There's no point making the same mistakes twice. We need to take the lessons the oil and gas industry has learned and apply them to the challenges ahead in renewables."

His comments reinforced a key message from Decom Week: as new industries enter the decommissioning lifecycle, the exchange of knowledge and experience across industries will be essential. By drawing on established expertise while embracing innovation, the UK has an opportunity to develop world-leading approaches to renewable energy decommissioning and strengthen its position in the global market.



MELANIE BROWNRIDGE

Chief R&D Officer, Nuclear Decommissioning Authority

Collaboration as a catalyst for innovation

While each energy industry faces its own technical, commercial and regulatory challenges, many of the underlying issues associated with decommissioning are remarkably similar. Creating opportunities to share knowledge, exchange ideas and develop solutions collectively is therefore becoming increasingly important as the industry evolves.

Speaking at Decom Week 2026, Melanie Brownridge, Chief R&D Officer at the Nuclear Decommissioning Authority (NDA), highlighted the vital role that collaboration plays in accelerating innovation and tackling common challenges across the decommissioning landscape.

Brownridge emphasised that bringing together organisations from different industries creates a valuable environment for learning and problem-solving. By connecting businesses, asset owners, technology providers and subject matter experts, events such as Decom Week help create the relationships needed to address complex industry challenges more effectively.

She also noted that the value of these conversations extends beyond the event itself. The networks formed through industry engagement provide a foundation for ongoing collaboration, enabling organisations to continue sharing experiences, developing new approaches and identifying opportunities to work together long after the conference has ended.

In a sector where innovation is often driven by collaboration, these connections can play a crucial role in helping organisations deliver safer, more efficient and more sustainable outcomes.

“Events like Decom Week are absolutely essential in terms of creating those networks and fostering those opportunities across the different industries. It brings people together with shared problems. It helps people talk about and develop shared solutions, and more importantly, it creates that network of people that can pick up the conversations after today.”

Brownridge’s comments reinforced one of the central themes of Decom Week 2026: the future of decommissioning will be shaped not only by technical expertise and innovation, but by the strength of the relationships and partnerships that enable knowledge and solutions to be shared across industries.



BOARD COMMENTARY

Gareth Jones, Chair of the Decom Mission Board of Directors

Stepping into the role of Chair this year has provided an opportunity to reflect on both the progress Decom Mission has made and the changing landscape in which our members operate.

One of the strongest messages to emerge from this year's Decom Week, and indeed from many conversations throughout the year, is that decommissioning can no longer be viewed through the lens of a single industry. Whether we are talking about oil and gas, renewables or nuclear, many of the challenges are shared. Equally, many of the solutions will come from collaboration, knowledge transfer and a willingness to learn from one another.

The perspectives shared by industry leaders throughout this report reinforce that point. There is growing recognition that the experience, capability and innovation developed within one industry can create significant value in another. As decommissioning activity expands across the wider energy landscape, organisations that can work across traditional industry boundaries will be best placed to succeed.

This trend is shaping how Decom Mission thinks about the future and, importantly, how we ensure the Board continues to provide the insight, expertise and strategic direction needed to support our members.

This year also saw a strong level of engagement in our Board elections. We were delighted not only by the number of candidates who put themselves forward, but by the calibre of individuals interested in helping shape the future direction of Decom Mission. The strength of the field is a powerful reflection of the value members place on the organisation and the important role it continues to play across the decommissioning sector.

I am pleased that our four incumbent directors seeking re-election, John Allan, Steve Andrew, Calum Crighton and Bryan Smith, were successfully returned by the membership, providing valuable continuity and experience. They will be joined by newly elected directors Lucinda Craig, Kelly Smith and Alan Campbell, each bringing fresh perspectives and expertise that will strengthen the Board and support the delivery of our strategic objectives.

Alongside the election process, the Board has taken deliberate steps to further strengthen its cross-industry insight. We are pleased to welcome Phoebe Lynch, Head of Innovation at the Nuclear Decommissioning Authority, who succeeds Stuart Millar, and Nicola Crawford-Percival, Decommissioning Lead - Offshore Wind at RWE, as co-opted Board members.

These appointments reflect an important strategic priority for Decom Mission. As opportunities continue to emerge across oil and gas, renewables and nuclear, it is essential that the Board reflects the markets in which our members operate and the industries where future decommissioning activity will develop. Strengthening our representation from the nuclear and offshore wind communities enhances our ability to identify emerging trends, understand future market opportunities and ensure that the support, intelligence and connections we provide remain relevant to members operating across an increasingly diverse energy landscape.

As Chair, I am encouraged by the balance we have achieved through this refreshed Board. We retain deep expertise in oil and gas decommissioning while strengthening our insight into nuclear and renewable energy decommissioning. This breadth of experience will be increasingly important as organisations seek to transfer capability across industries, diversify their offerings and pursue new opportunities.

Decom Mission was founded on the principle that bringing people together creates value for the industry. As the boundaries between industries continue to blur, that principle has never been more relevant. The future of decommissioning will be shaped by collaboration across our peers, industries, technologies, regulators and markets, and our role is to help members navigate and capitalise on those opportunities.

I look forward to working with the Board, our members, peers and our partners as we continue to strengthen those connections, support innovation and ensure that Decom Mission remains at the forefront of the opportunities ahead.

OUR BOARD



GARETH JONES
Chairperson



CALUM CRIGHTON
Vice-Chairperson



JOHN ALLAN



STEVE ANDREW



WILL BLACK



ALAN CAMPBELL



LUCINDA CRAIG



NICOLA CRAWFORD-PERCVIAL



CAROLINE LAWFORD



PHOEBE LYNCH



JINDA NELSON



BRYAN SMITH



KELLY SMITH

WITH THANKS TO OUR INDUSTRY PARTNERS

BECBC
Britain's Energy Coast Business Cluster

CODA
CENTRE OF DECOMMISSIONING AUSTRALIA

ENERGY INDUSTRIES COUNCIL
EIC

ETZ

FINDES

GUH Global Underwater Hub

NDA

NIA
Nuclear Industry Association

North Sea Transition Authority

The National Decommissioning Centre
Innovation through Partnership

RenewableUK

STEP CHANGE IN SAFETY

ZERO WASTE SCOTLAND

Decommission®

decommission.net