



North Sea  
Transition  
Authority

# Guidance on information and samples plans and coordinators for carbon storage

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# Scope and purpose of this guidance

- 1.** This guidance explains the provisions made in Part 2, Chapter 5 of the Energy Act 2023 (the 2023 Act)<sup>1</sup> in relation to the preparation of information and samples plans (ISPs), the role of information and samples coordinators (ISCs), and describes the NSTA's expectations regarding such plans and how it expects to interact with an ISC.
- 2.** Part 2, Chapter 5, s. 109 and 110 of the 2023 Act provide a requirement for a responsible person to prepare an information and samples plan in relation to certain licence events under a carbon dioxide appraisal and storage licence (CS licence). These provisions set out the licence events, the content of ISPs, how and within which timescales they must be agreed with the NSTA, and their effects. Part 1 of this document provides further information on ISPs.
- 3.** Part 2, Chapter 5, s.111 of the 2023 Act provides a requirement for a relevant person to appoint an information and samples coordinator. While guidance on this role is included in this document alongside guidance for ISPs, the responsibilities of an ISC are not limited only to the preparation and agreement of an ISP. They include monitoring the relevant person's compliance with its obligations under Chapter 5 of the 2023 Act amongst other duties. Further information on ISCs is contained in Part 2 of this document.
- 4.** This guidance is not a substitute for any regulation or law and is not legal advice.
- 5.** The guidance will be kept under review and amended as appropriate in the light of further experience and developing law and practice, and any changes to the NSTA's powers and responsibilities. If the NSTA changes its guidance in a material way, it will publish a revised document.

<sup>1</sup> Energy Act 2023

# Introduction and context

- 6.** Provisions for carbon storage information and samples have been introduced in Part 2, Chapter 5 of the 2023 Act which came into force on 26<sup>th</sup> December 2023, including:
  - i. The requirements to create regulations for the retention of carbon storage information and samples<sup>2</sup> (s. 108),
  - ii. The power for the NSTA to request carbon storage information and samples (s. 112),
  - iii. A general prohibition on disclosure of carbon storage information and samples requested by the NSTA under s.112 ('protected material') except in accordance with Schedule 7 of the 2023 Act,
  - iv. The requirements to create regulations for the disclosure of protected material<sup>3</sup> (Schedule 7, para.4),
  - v. The requirement to prepare and agree ISPs in connection with certain licence events (s. 109 and 110), and
  - vi. The requirement to appoint an ISC (s.111).
- 7.** Guidance on the retention, reporting and disclosure of carbon storage information and samples will be issued separately.

<sup>2</sup> These came into force on the 13<sup>th</sup> May 2025: [The Oil and Gas Authority \(Carbon Storage\) \(Retention of Information and Samples\) Regulations 2025](#)

<sup>3</sup> These came into force on the 9<sup>th</sup> January 2026: [The Oil and Gas Authority \(Carbon Storage and Offshore Petroleum\) \(Specified Periods for Disclosure of Protected Material\) Regulations 2026](#)

# NSTA framework

- 8.** Under the Energy Act 2008 (the 2008 Act) the NSTA is the carbon storage licensing authority in respect of an 'offshore UK-controlled place' and an 'English controlled place'<sup>4</sup>.
- 9.** The safe retention, timely reporting and subsequent disclosure of carbon storage information and samples is key to supporting the growing carbon storage (CS) industry in the UK. ISPs and ISCs are integral in managing carbon storage data effectively. With this, the NSTA helps drive energy transition, realising the significant potential of the United Kingdom Continental Shelf (UKCS) as a critical carbon abatement resource.

<sup>4</sup> As defined in s.18 of the Energy Act 2008.

# Part 1: Information and samples plans

## Objectives of an ISP

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- 10.** The objective of an ISP is to ensure that the retention and reporting obligations are met and that risks of loss of information and samples at the time of a licence event are minimised. Well prepared and executed ISPs are therefore critical for continuing safe operations and for the avoidance of information or sample loss at licence events.
- 11.** A prime consideration in the preparation of an ISP is to define what must be included in its scope, so that the effort expended in preparation and delivery of the plan is proportionate to the value of the information and samples at risk. The use of NSTA ISP templates will support licensees when they choose what to include, and what not to include, so that the time for plan approval is minimised. Further information with respect to ISPs and ISP templates is provided below.

## What is an ISP?

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- 12.** An ISP documents what will happen to information and samples at the time of a licence event, and how and when any transfer of information and samples will take place.
- 13.** S. 109 and 110 of the 2023 Act lay out the provisions in relation to the preparation by a responsible person of an information and samples plan, in connection with a licence event and agreement of such a plan with the NSTA.
  - A ‘responsible person’ is defined in s.109(2), in relation to a licence event, as the person who is or was, or the persons who are or were, the licensee in respect of the relevant licence immediately before the licence event.
  - An ‘information and samples plan’ is defined in s.109(4), in relation to a licence event, as a plan dealing with what is to happen, following the event, to carbon storage information and samples held by the responsible person before said event.
  - ‘Carbon storage information’ is defined in s.107(4) as information acquired or created by or on behalf of a licensee in the course of carrying out activities under the licensee’s carbon storage licence.
  - ‘Carbon storage samples’ are defined in s.107(5) as samples of substances acquired by or on behalf of a licensee in the course of carrying out activities under the licensee’s carbon storage licence.
  - A ‘licence event’ is defined in the following ‘When is an ISP required’ section.

- 14.** The preparation, agreement, and execution of an ISP aims to ensure that retention and reporting obligations are met and that the potential transfer of information and samples during licence events is conducted effectively and efficiently. Information and samples that are in scope of the ISP are to be retained, reported and/or transferred successfully and in complete in the time frame specified within the ISP.
- 15.** The volume and complexity of information and samples associated with each licence is influenced by a range of factors such as the age of the licence, age of any installations, the licence term (e.g. initial/appraisal term or operational term), the data management practices of existing or former licensees and more. The requirements to transfer information and samples will vary, and the ISP must be adjusted accordingly.

### **When is an ISP required?**

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- 16.** ISPs must be prepared in connection with the specific licence events. A 'licence event' is defined in s.109(1) as meaning:
- a) A change in control of a company which is a licensee
  - b) A change in the identity of:
    - i. the exploration operator under a CS licence, or
    - ii. where a storage permit has been granted under a carbon storage licence, the operator in relation to the storage permit.
  - c) a transfer of rights under a CS licence, whether in relation to all or part of the area in respect of which the licence was granted.
  - d) a surrender of rights under a CS licence in relation to all of the area in respect of which the licence was granted, or in relation to so much of that area in respect of which the licence continues to have effect.
  - e) the expiry of a CS licence.
  - f) the termination of a CS licence.
  - g) the revocation of a storage permit.
- 17.** A CS Licence is defined in s.107(2) as a licence granted, or having effect as if granted, by the NSTA under s.18(1) of the Energy Act 2008<sup>5</sup> (the 2008 Act) in respect of one or more of the activities listed in s.17(2) of the 2008 Act for the purposes of storing carbon dioxide.

<sup>5</sup> Energy Act 2008

- 18.** A storage permit is defined in regulation 1(3) of the Storage of Carbon Dioxide (Licensing etc) Regulations 2010<sup>6</sup> (the Storage Regulations) as a consent granted by the NSTA under a carbon storage licence, authorising the use of a place as a storage site.
- 19.** Broadly, these events can be grouped into three types of events, namely:
- a) change in control,
  - b) transfer of rights, and
  - c) determination.
- 20.** A change in control refers to an event where control over a company acting as a licensee is taken over, whether partially or in full, by another entity which had not previously had control over it<sup>7</sup>. An ISP must be prepared and agreed with the NSTA to ensure that the company acting as the licensee continues to be able to retain and report information and samples after the change in control takes place.
- 21.** A transfer of rights refers to an event where the rights under the licence are being transferred from an existing licensee to another licensee. This transfer can be regarding either the entire area in relation to which the licence was granted or only a part of it. In the latter case, the ISP must be prepared for all the carbon storage information and samples held by the licensee before the transfer, and not only those created or acquired in respect of the part of the area over which the rights are being transferred. These events vary depending on multiple factors, but they have a common denominator of an operational handover between companies where there is a risk of information loss. A change in operator, although not equal to a transfer of rights, may also pose a similar risk of loss meaning a comprehensive ISP is required in both cases. The focus is on ensuring all information and samples in relation to that licence are transferred to those continuing with the licence activities.
- 22.** A determination for the purposes of an ISP refers to an event where the licence or part of it is no longer extant after the event occurs. This includes a full and partial surrender of rights, full and partial expiry or termination of a licence, and the revocation of a storage permit. The aim of the ISP in these cases is on ensuring that carbon storage information and samples created or acquired throughout the licence's lifecycle have been compliantly reported to the NSTA before the event occurs, or a plan to do so where reporting has not been completed.
- 23.** ISPs must be prepared and agreed with the NSTA before the event takes place (s.109(5)(a)), with two exceptions. In the case of the licence being fully terminated or the storage permit revoked, the ISP may be prepared within a reasonable period after the event (s.109(5)(b)).

<sup>6</sup> The Storage of Carbon Dioxide (Licensing etc.) Regulations 2010

<sup>7</sup> Regulation 6(3) of the CS Licensing Regulations. Provisions included through s.103 and Schedule 6 of the 2023 Act.

- 24.** Responsible persons should contact the NSTA regarding the requirements of an ISP when a licence event is being planned. The ISP should start to be prepared at an early stage since matters highlighted by it may have material impacts on agreements. For example, well responsibilities and associated liabilities, including abandonment, may be part of an ISP.
- 25.** The responsible person can inform the NSTA of a pending licence event and request information related to the requirements of an ISP at any point. This can be before the NSTA has sent a notification to require the preparation and submission of an ISP or has officially been notified of the event. This notification will be sent to the responsible person through its ISC within a reasonable time after the NSTA has received an application for or a notification of a licence event.
- 26.** Enquiries and requests for further information on the requirements of the ISP should be directed to [ISC@nstauthority.co.uk](mailto:ISC@nstauthority.co.uk).

## **Who should prepare an ISP?**

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- 27.** As defined in the above section ‘What is an ISP?’, s.109 provides that a ‘responsible person’ must prepare it, namely the person who is or was, or the persons who are or were, the licensee immediately before the licence event.
- 28.** Where the licence event relates to one licensee, that licensee is the responsible person. This is the case for a change of control of the licensee’s company, a sole licensee surrendering or transferring all or part of its rights or where only one licensee in a licence group is transferring their rights under the licence.
- 29.** Where more than one of the licensees is affected by a licence event, then they all are the ‘responsible person’ with an obligation to prepare an ISP. This is the case for determination events where the licence is fully or partially surrendered, expires or is terminated. In these scenarios, only one joint ISP should be prepared.
- 30.** If the storage permit is revoked, the responsible person will be the licensee if a sole holder, or all licensees if there is more than one holder. In the latter case, only one joint ISP should be prepared.
- 31.** Where an ISP requires another person, other than the responsible person, to hold information and samples, s.110(5) provides that the plan may impose requirements on that person in connection with the information and samples. This requires that person’s consent and any such requirements are sanctionable under Chapter 5 of the 2023 Act.

## Content of an ISP

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- 32.** At a general level, s.110(4) states that an ISP may provide as appropriate for:
- the retention, by the responsible person, of any carbon storage information and samples held by or on behalf of that person before the licence event,
  - the transfer of any such information or samples to a new licensee, or
  - appropriate storage of such information or samples.
- 33.** Reporting of information and samples to the NSTA should be prioritised in any case, thereby ending the obligation to retain. Only information and samples that cannot be reported or that have been reported but need to be retained for operational purposes should be dealt with according to points a) to c) above.
- 34.** As noted in the above section ‘When is an ISP required?’, different licence events have different levels of risk of information loss and require different approaches. Irrespective of the case, all ISPs should address the following points:
- Licence event and description:
    - The relevant licence event triggering the ISP requirement from those listed under s.109(1), and
    - A description of the licence event such as affected licence(s), storage site(s), companies, operators, JV partners, changing equity, ISC contact details, and more.
  - Information and samples:
    - What types of information and samples are in scope and not in scope<sup>8</sup>, including a location map,
    - Their physical or virtual location and whether that location is under the control of the outgoing licensee (their premises) or a third party (physical records storage provider/ IT provider/ engineering contractor, etc),
    - Listings of information and samples that are to be transferred and to where, which retained and which reported, including listings of reportable items that have been compliantly reported
    - How the information and samples will be transferred to the incoming licensee or reported to the NSTA,
    - When the transfer will take place, and
    - Any other requirements discussed and agreed with the NSTA based on the specifics of the licence event.

<sup>8</sup> In cases where a well or a survey fall within the geographical bounds of the licence, but are not included in the scope of the ISP (maybe because they relate to a previous licence over the same geographical area), it would be prudent to acknowledge the existence of the well / survey and explain why it is not included in the ISP scope.

- Contact details:
    - Of key personnel involved in the execution of the ISP in the outgoing and incoming licensees, and
    - A correspondence address which references the ISP reference number assigned to it by the NSTA.
- 35.** The types of information and samples subject to an ISP include, but are not limited to, geophysical surveys, wells, storage site, complex and hydraulic unit information, injection and production, monitoring and installation information and relevant samples as detailed by The Oil and Gas Authority (Carbon Storage) (Retention of Information and Samples) Regulations 2025 (the CS Retention Regulations)<sup>9</sup>. Other information that may form the content of an ISP are which parties are responsible for bearing any identified costs such as the reporting of abandonment data, maintenance of physical storage media (e.g. field tapes), or core handling.
- 36.** The NSTA will provide ISP templates for commonly occurring licence event types, but there is no requirement to use a specific ISP template. A responsible person's own methods, process and templates can be used however it is recommended they collaborate with the NSTA at the earliest possible opportunity to understand the NSTA's requirements for the specific licence event in question.
- 37.** Responsible persons should contact the NSTA regarding the requirements of an ISP when a licence event is being planned.
- 38.** A responsible person can inform the NSTA of a pending licence event and request information related to the requirements of an ISP at any point. This can be before the NSTA has sent a notification to require the preparation and submission of an ISP or has officially been notified of the event.
- 39.** Enquiries and requests for further information on the requirements of the ISP should be directed to [ISC@nstauthority.co.uk](mailto:ISC@nstauthority.co.uk).

## **By which criteria will the NSTA agree an ISP?**

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- 40.** As stated in the above section 'When is an ISP required?', s.109 makes provision that an ISP must be agreed with the NSTA before the event takes place or within a reasonable period after the event if the licence is terminated or storage permit revoked.

<sup>9</sup> The Oil and Gas Authority (Carbon Storage) (Retention of Information and Samples) Regulations 2025 came into force on 13 May 2025 and apply to the carbon storage information and samples created or acquired by or on behalf of the holder of a carbon storage licence.

- 41.** Some of the NSTA's considerations when reviewing ISPs may include, but are not limited to:
- Does the scope of the ISP cover (and only cover) licences relevant to the licence event?
  - Are all the information and sample types relevant to the licence event included in the ISP?
  - Are all information and sample types that are associated with the licence, included in the ISP? Meaning, does the ISP include (and only include) relevant wellbores, geophysical surveys, offshore platforms, etc?
  - Are all information and sample items, related to each wellbore, geophysical survey etc. included?
  - Does the ISP and any contained maps use standard industry accepted naming conventions for all information and samples?
  - If information and samples are required to be transferred, is the method of transfer defined? In some cases, information and samples will need to be physically moved. In other cases, data entitlements could be managed to affect the transfer.
  - Are the proposed information and samples transfer (physical and virtual) methods acceptable to all parties?
  - Is the timing acceptable to all parties?
  - Is there an effective project management process in place, with effective governance, communication planning, risk management etc. taking place?
  - Are all areas of the responsible persons organisation involved? To include subsurface and where appropriate those responsible for infrastructure, continued operations etc.
  - Are all necessary parties involved in the transfer? In particular, the incoming licensee, in the case of the transfer of rights and the NSTA, in the case of surrender, expiry, or revocation.
- 42.** The overarching criteria governing acceptance of an ISP is that the NSTA is satisfied the objectives of the plan, as stated in the objectives section of this guidance, are fulfilled.
- 43.** To prepare an ISP that is likely to gain approval, following this guidance document as well as any additional information or templates provided by the NSTA is strongly encouraged. The responsible person should adhere to any timelines for execution of requirements specified in an ISP that have been agreed with the NSTA.

## **Submission of an ISP to the NSTA**

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- 44.** The form of an ISP will be determined by the nature of the associated licence event. The NSTA will notify the ISC of the requirement for an ISP to be prepared and submitted. Notifications will be issued by the mailbox [ISC@nstauthority.co.uk](mailto:ISC@nstauthority.co.uk), citing a unique reference in each case. This unique reference is to be used in all ISP related communication and should

be noted in the ISP document itself. As part of the notification, the ISC will be directed to the appropriate ISP templates and the latest version of this guidance.

- 45.** All ISP related communication, including notifying the ISC of queries and approval, will be made via the [ISC@nstauthority.co.uk](mailto:ISC@nstauthority.co.uk) mailbox.

## **Imposition of an ISP by the NSTA**

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- 46.** In accordance with s.109(7), (8), and (9), if an ISP is not prepared and agreed with the NSTA, the NSTA itself may prepare one. The NSTA may also require the responsible person to provide it with such information as required to enable it to do so. This requirement is sanctionable under Chapter 5 of the 2023 Act.
- 47.** An ISP prepared by the NSTA has the same effect as if it had been prepared by the responsible person and agreed with the NSTA.
- 48.** In this scenario, the NSTA must inform the responsible person of the terms of any ISP it prepares in connection with a licence event. Where a transfer of information and samples to another person is required, the NSTA may not include this requirement in the ISP without the responsible person's consent (s.110(6)).

## **Sanctions for non-compliance**

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- 49.** Requirements relating to an ISP sanctionable under Chapter 5 of the 2023 Act are those imposed by:
- S.109(5) relating to the agreement of an ISP with the NSTA,
  - S.109(7)(b) requiring the responsible person to provide the NSTA with the required information where the NSTA prepares the ISP, and
  - S.109(10) requiring the responsible person to comply with an ISP.

## **Changing an ISP**

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- 50.** Once agreed with the NSTA, changes to an ISP may still be made if such changes are agreed with the NSTA in accordance with s.110(1) to (3). Once the changes are agreed, the plan has effect subject to those changes.
- 51.** Where two or more persons are the responsible person in relation to a licence event and those persons include a company that has, since the licence event, been dissolved, that company is no longer a responsible person for the purpose of agreeing changes to the ISP.

# Part 2: Information and samples coordinators

## What is an information and samples coordinator?

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- 52.** An information and samples coordinator is a named individual who is appointed by the relevant person, to monitor information and samples compliance and act as the primary point of contact for communications between the NSTA and a relevant person, in relation to carbon storage information and carbon storage samples obligations.
- 53.** S.111(3) of the 2023 Act states: ‘The information and samples coordinator is to be responsible for monitoring the relevant person’s compliance with its obligations under this Chapter.’
- 54.** These obligations include:
- Ensuring the retention of information and samples as prescribed by regulations when an ISP is not in effect,
  - Reporting of information and samples to the NSTA in response to a s.112 notice,
  - The preparation and agreement with the NSTA of an ISP by the responsible person,
  - Providing the NSTA with the required information for it to prepare an ISP if one has not been agreed,
  - Compliance with an ISP when one is in effect,
  - Ensuring any changes to an ISP that is in effect have been agreed with the NSTA.
- 55.** Failure to comply with these obligations is sanctionable. A relevant person must appoint an ISC to monitor its compliance with these obligations in accordance with s.111(1). Where information and samples are held by a person other than the responsible person in accordance with an ISP, the requirements imposed by the ISP on that person are sanctionable.
- 56.** The NSTA expects to communicate frequently with the ISC whether this communication will be generic and applicable to all or many relevant persons, or specific to an individual relevant person.

## Who must appoint an ISC?

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- 57.** As stated above, in accordance with s.111(1) of the 2023 Act a relevant person must appoint an ISC and notify the NSTA of that individual’s name and contact details.
- 58.** A relevant person is defined in s.111(2) as a licensee or an exploration operator under a CS licence.

- 59.** A licensee is defined in s.107(2) as a person who holds a licence under s.18(1) of the 2008 Act.
- 60.** An exploration operator is defined in s.107(3) as a person who is responsible for organising or supervising:
- a) the carrying on of exploration, within the area within which activities are authorised under the licence, with a view to, or in connection with, the carrying on of activities within s.17(2)(a) or (b) of the 2008 Act, or
  - b) the establishment or maintenance in a controlled place (as defined in s.17 of the 2008 Act) of an installation for the purposes of such exploration.
- 61.** The activities specified in s.17(2)(a) and (b) of the 2008 Act are:
- a) the use of a controlled place for the storage of carbon dioxide (with a view to its permanent disposal, or as an interim measure prior to its permanent disposal),
  - b) the conversion of any natural feature in a controlled place for the purpose of storing carbon dioxide (with a view to its permanent disposal, or as an interim measure prior to its permanent disposal).

## **What are the responsibilities of an ISC?**

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- 62.** As stated in the above ‘What is an information and samples coordinator?’ section, in accordance with s.111(3) of the 2023 Act an ISC ‘is to be responsible for monitoring the relevant person’s compliance with its obligations under this Chapter’ with the listing of obligations provided above.
- 63.** In addition to monitoring compliance with these obligations, the NSTA expects that the ISC will also:
- Be a focal point for communications between the NSTA and the relevant person for these matters,
  - Ensure that all necessary actions are taken by the relevant person to satisfy the requirements of a notice received from the NSTA under s.112 of the 2023 Act requesting the provision of carbon storage information and/or samples,
  - Ensure that requirements of the 2023 Act relating to carbon storage information and samples are communicated to, and supported by their organisation,
  - Work with the leaders of all departments and functions within their organisation that create, acquire, and hold carbon storage information and samples to ensure that they are retained and appropriately reported to the NSTA.

## The role of an ISC

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64. The NSTA does not seek to define the precise skills profile of an ISC or to provide a specific job description for the role. Rather it is for the relevant person to determine this based on their stated obligations.
65. When appointing an ISC, a relevant person should consider the nature, range and scale of those obligations.
66. The role of an ISC combines aspects of several organisational roles, recognised across industry, such as, but not limited to, those of a compliance manager, audit manager and information manager. The role may require frequent and potentially robust interactions with the leadership and staff of multiple business departments and functions.
67. The role of an ISC may or may not be a full-time post, depending on the nature of a relevant person and the scale of its operational activities in the UKCS.

## Notification to the NSTA of the appointment of an ISC

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68. A relevant person must notify the NSTA of that individual's name and contact details within a reasonable period after becoming a relevant person or since s.111 has come into force, including any change in identity or contact details of the ISC. These requirements are sanctionable under Chapter 5 of the 2023 Act.
69. In addition, the NSTA encourages relevant persons to make available the details of a shared email "mailbox" for ISC correspondence that can be monitored by more than one authorised individual. The intention is to include both the ISC and the shared mailbox in communications.
70. Relevant persons should notify the NSTA of the appointment of a new ISC, or a change to the details of an existing ISC, by email to the mailbox [ISC@nstauthority.co.uk](mailto:ISC@nstauthority.co.uk).
71. The NSTA does not approve the appointment of an ISC. However, it will confirm receipt of new or updated ISC contact information by email and/or letter to the relevant person and will copy such confirmation to the ISC as appropriate.

## When will the NSTA contact an ISC?

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- 72.** The ISC is the primary point of contact between the NSTA and relevant persons for matters related to Part 2, Chapter 5 of the 2023 Act.
- 73.** Notices from the NSTA requiring a relevant person to provide carbon storage information and samples under s.112 (reporting notice) will be addressed directly to the relevant person, however in most circumstances a copy of such notice will be simultaneously sent to the ISC.
- 74.** Key aspects of communications between the NSTA and the ISC will include:
- Routine reporting of carbon storage information and samples,
  - Preparation and agreement of ISPs,
  - Ad-hoc queries from the NSTA in relation to information and samples, and ISPs.

# Definition of terms

Term	Meaning
<b>CS</b>	Carbon storage (the subsurface storage of carbon dioxide)
<b>CS licence</b>	Carbon dioxide storage and appraisal licence
<b>Carbon storage information and samples</b>	Information and samples acquired or created by or on behalf of a licensee in the course of carrying out activities under the licensee's CS licence
<b>CS retention regulations</b>	The Oil and Gas Authority (Carbon Storage) (Retention of Information and Samples) Regulations 2025
<b>Entitlements</b>	Entitlements are a process where an information owner 'entitles' (allows) another party access to information held in an IT application or physical store
<b>Exploration operator</b>	A person who is responsible for organising or supervising exploration under the CS licence and/or the establishing or maintaining an installation for exploration. Refer to s.107(3) of the 2023 Act for a full definition.
<b>Geophysical survey</b>	Survey that records geophysical characteristics such as the elastic, gravitational, magnetic or electrical properties of the Earth's subsurface
<b>Initial/appraisal term</b>	The period during which exploration, appraisal, and project 'assess' and 'define' phase activities may be carried out to evaluate the potential for a storage project, and/or an application for a storage permit is made. This term ends with either the grant of a storage permit (if applied for) or the expiry of the CS licence. For more information refer to the NSTA's guidance on the application for a Carbon Dioxide Appraisal and Storage Licence
<b>ISC</b>	Information and samples coordinator
<b>ISP</b>	Information and samples plan

Term	Meaning
<b>Operational term</b>	The period beginning with the date on which the storage permit is granted and ending with the closure of the storage site. For more information refer to the NSTA's guidance on the application for a Carbon Dioxide Appraisal and Storage Licence
<b>Relevant person</b>	A relevant person is a licensee, and/or an exploration operator under a carbon storage licence. A relevant person is required to appoint an ISC. (2023 Act, s.111(2))
<b>Responsible person</b>	A responsible person is the person who is or was, or the persons who are or were, the licensee in respect of the relevant licence immediately before the licence event. The responsible person is required to prepare and agree and ISP with the NSTA in connection with a licence event.
<b>Storage regulations</b>	The Storage of Carbon Dioxide (Licensing etc) Regulations 2010
<b>The 2008 Act</b>	The Energy Act 2008
<b>The 2023 Act</b>	The Energy Act 2023
<b>UKCS</b>	United Kingdom Continental Shelf

# Appendix A: Common licence event scenarios

Licence event type	Scenario	ISP requirement
<p><b>Change in control</b></p>	<p>A change in control of a company which is taken over, whether partially or in full, by another entity which had not previously had control over it.</p>	<p>Confirm with the NSTA via <a href="mailto:ISC@nstauthority.co.uk">ISC@nstauthority.co.uk</a> if the need is only to provide a letter.</p> <p>The completed template letter will constitute the ISP. It will confirm that no information and samples will need to move/be transferred as a result of the licence event, since information and sample management systems are common across both entities.</p>
<p><b>Change in exploration operator or storage permit operator</b></p>	<p>A change in either the exploration operator under a carbon storage licence or, where a storage permit has been granted, the storage permit operator.</p>	<p>An ISP is required.</p> <p>The ISP should specifically describe/identify information and samples that the outgoing licensee is required to transfer to the existing licensees.</p> <p>Contact the NSTA via <a href="mailto:ISC@nstauthority.co.uk">ISC@nstauthority.co.uk</a> to confirm requirements.</p>

Licence event type	Scenario	ISP requirement
<b>Transfer of rights</b>	The transfer of rights is between (from/to) companies (legal entities) that are controlled by the same company group.	<p>Confirm with the NSTA via <a href="mailto:ISC@nstauthority.co.uk">ISC@nstauthority.co.uk</a> if the need is only to provide a letter.</p> <p>The completed template letter will constitute the ISP. It will confirm that no information and samples will need to move/be transferred as a result of the licence event, since information and sample management systems are common across both entities.</p>
<b>Transfer of rights</b>	<p>The transfer of rights is to a company that already holds an interest in that licence and</p> <p>the company having rights transferred to them (and the other licence holders) has confirmed (to both the exiting licensees and the NSTA) that a transfer of information and samples from the exiting licensee is not required.</p>	The completed template letter will constitute the ISP. It will confirm that no information and samples will need to move / be transferred as a result of the licence event, since all relevant information and samples are already in the possession/control of the licence group.

Licence event type	Scenario	ISP requirement
<b>Transfer of rights</b>	<p>The transfer of rights is to a company that already holds an interest in that licence and</p> <p>one or more parties in the existing licence group requires a transfer of information and samples from the exiting licensee.</p>	<p>An ISP is required.</p> <p>The ISP should specifically describe/identify information and samples that the outgoing licensee is required to transfer to the existing licensees.</p> <p>Contact the NSTA via <a href="mailto:ISC@nstauthority.co.uk">ISC@nstauthority.co.uk</a> to confirm requirements.</p>
<b>Transfer of rights</b>	<p>The transfer of rights is to a company that is a new licensee (licensee is joining the licence group).</p>	<p>An ISP is required.</p> <p>The ISP should specifically describe/identify information and samples that the new licensee(s) require to be transferred to the new licensee.</p> <p>Contact the NSTA via <a href="mailto:ISC@nstauthority.co.uk">ISC@nstauthority.co.uk</a> to confirm requirements</p>
<b>Surrender of rights</b>	<p>A surrender of rights under a carbon storage licence in relation to all or part of the area in respect of which the licence was granted, or in relation to so much of that area in respect of which the licence continues to have effect.</p>	<p>An ISP is required.</p> <p>The ISP will need to include a plan regarding how it will be demonstrated that all reporting requirements based on the information and samples powers in the Energy Act 2023 have been or will be met.</p>

Licence event type	Scenario	ISP requirement
<b>Expiry of a CS licence</b>	The licence is expiring.	An ISP is required. The ISP will need to include a plan regarding how it will be demonstrated that all reporting requirements based on the information and samples powers in the Energy Act 2023 have been or will be met.
<b>Termination of a CS licence</b>	The CS licence is terminated in line with The Storage of Carbon Dioxide (Termination of Licences) Regulations 2011.	An ISP is required. The ISP will need to include a plan regarding how it will be demonstrated that all reporting requirements based on the information and samples powers in the Energy Act 2023 have been or will be met.
<b>Revocation of a storage permit</b>	The NSTA is revoking the storage permit.	The NSTA will require an ISP. Full requirements will be determined at the time of the event.



