E X P O R T C E N T R A L   A I   ·   W E E K L Y   I N T E L L I G E N C E

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 27 June 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

IN THIS WEEK'S BRIEFING

Coverage: 21 – 27 June 2026. Sectors: offshore wind (fixed-bottom & floating), hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning, grid & policy.

HEADLINE SIGNALS – WEEK ENDING 27 JUNE 2026

- Netherlands publishes FINAL IJmuiden Ver Gamma A/B tender terms: dual auction (1 GW subsidy-free + 1 GW two-sided CfD), €4.75bn ceiling, tender open 26 November to 10 December 2026, awards Q1 2027, commissioning 2032; the most explicit continental response to the negative-bid exhaustion.
- Germany formally rejects TotalEnergies' request to return the NSE2 1.5 GW concession: Federal Economy Minister Reiche says concessions are binding; no return mechanism will be opened. Coordinated with the Dutch reset, this signals active continental enforcement of negative-bid commitments.
- Vår Energi sanctions Gjøa Subsea Projects (Ofelia + Gjøa Nord + Cerisa): ~76 MMboe gross 2P, ~$1.42bn (NOK 14bn) investment, Cerisa first oil 2027, Ofelia + Gjøa Nord H2 2028; subsea tieback to Gjøa and Duva. Partners Vår Energi, Harbour Energy, Petoro, OKEA, INPEX, ORLEN, DNO, Aker BP, Pandion.
- Equinor and partners commit NOK 4bn to Troll TWIN: 11 bcm of additional gas, 2028 startup; partners Equinor 30.55%, Petoro 55.93%, Shell 8.19%, TotalEnergies 3.69%, ConocoPhillips 1.64%. Equinor also advances Johan Sverdrup Phase 4 (Tonjer + Geitungen) and submits the Wisting EIA (~500 MMboe Barents Sea), dropping power-from-shore.
- Brazil's CADE clears the Subsea7–Saipem merger without restrictions; Morgan Stanley names Subsea7 Top Pick; the combined Saipem7 entity is expected to complete in H2 2026 — the largest European subsea-services merger of the decade.
- Amazon contracts Skyborn for 600 MW from the 976.5 MW German Baltic Gennaker offshore wind farm — the largest German offshore corporate PPA to date, €3bn project value, COD late 2028; Uniper separately signs its first-ever offshore wind PPA covering 100 MW from the same project.
- Shell takes FID on REFHYNE II: 100 MW PEM electrolyser at Rheinland (Wesseling, Germany), up to 44,000 kg/day, operations 2027; partners ITM Power, Linde, TECNALIA and SINTEF — the largest German refinery-integrated electrolyser FID of 2026 to date.
- Hy2gen's Nordic Albatros (Kassø, Denmark) selected for European Hydrogen Bank support at €0.97/kg over a 100 MW electrolyser, 144,000 t over 10 years from 2031. Plug Power

commissions 5 MW PEM at European Energy's Måde PtX facility, Esbjerg (RFNBO ISCC, 550 t/yr).

- BioCirc opens the world's largest biogas-based CCS facility at Vesthimmerland, Jutland (32,500 t/yr to INEOS Greensand) and signs a 7-year 650,000 t deal with Microsoft (100,000 CRUs/yr 2026–2032); Flanders unveils a €2bn industrial decarbonisation plan; Porthos operational start slips into 2027; EU CO2 storage 2030 target will be missed by ~35% (CATF).
- Norwegian SAFE union strike escalates to lockout from 22 June: 1,272 of 1,770 SAFE members affected across SLB, DOF, Halliburton, Weatherford, Tios, DeepOcean, Subsea 7, Cactus, Vetco Gray Scandinavia, Baker Hughes; four IMR vessels, one well-intervention vessel and two rigs halted — the most consequential Norwegian offshore labour disruption since 2020.

For North East Scotland, the priority pattern is unambiguous: continental fixed-bottom T&I procurement, NCS subsea EPCI engagement, Shell REFHYNE II refinery-integrated electrolyser supply, BioCirc CCS commercial-operations engineering, and the Subsea7–Saipem post-merger framework re-positioning over the next 60 days.

1. Offshore Wind — Fixed Bottom

Netherlands Publishes FINAL IJmuiden Ver Gamma A/B Tender Terms — Dual Subsidy-Free + Two-Sided CfD Design, €4.75bn Ceiling, 26 November Tender Open

On 23 June the Dutch Climate and Green Growth Ministry, RVO and TenneT published the FINAL tender terms for IJmuiden Ver Gamma A and Gamma B. The design is a deliberate dual auction: one 1 GW subsidy-free site and one 1 GW two-sided Contract-for-Difference site supported by a €4.75bn ceiling. The tender opens 26 November 2026 and closes 10 December 2026, with awards Q1 2027 and commissioning targeted 2032. The published tender terms (Renewable Energy Industry, Westwood Global Energy Group coverage) represent the most explicit continental procurement response to date to the negative-bid exhaustion that defined 2024–2025 and reverses the Dutch position established under the original IJmuiden Ver Alpha and Beta zero-subsidy framework. The two-sided CfD instrument is structured to absorb both downside revenue risk (where the strike price exceeds the day-ahead average) and upside windfall capture (where the day-ahead average exceeds the strike). The non-price criteria include explicit weighting for ecology, system integration and cost-effectiveness, with European-content criteria in the qualitative scoring. The IJmuiden Ver wider zone targets 4.7 GW total by 2032 — making this dual auction the structural anchor of the Dutch offshore wind procurement programme.

NES SALES OPPORTUNITY

IJmuiden Ver Gamma A/B — €4.75bn Two-Sided CfD Procurement Window Opens 26 November

NES Tier 2/3 suppliers in T&I logistics, substation fabrication, secondary steel, dynamic cabling, monopile transport, scour protection, environmental monitoring, ecology mitigation engineering and marine warranty should engage likely bidders (Crosswind, Ecowende, Zeevonk II, RWE-OW Ocean Winds JV) and the Dutch RVO procurement team during the 23 June to 10 December bid

> construction window. Information sessions and technical Q&A run through Q3 2026 with bid submission 10 December 2026.

Germany Formally Rejects TotalEnergies Request to Return NSE2 1.5 GW Concession — Reiche Says Concessions Are Binding

On 22 June Federal Economy Minister Katherina Reiche formally rejected TotalEnergies' request to return its NSE2 1.5 GW German North Sea concession previously won under the negative-bid procurement framework. Speaking at the Rostock Siemens Energy event covering the NSORe HVDC platform award (announced the previous week), Reiche told reporters that German offshore wind concessions are binding and that no return mechanism would be opened. Windtech International, Offshore Wind Biz and German-language trade press confirm the formal rejection. The German position is the strongest single regulatory signal of active continental enforcement of negative-bid commitments and is coordinated with the Dutch IJmuiden Ver Gamma A/B dual-auction reset published the previous day. Together they signal that the continental offshore wind procurement reset is being delivered through two complementary instruments: design reform of new sites (Dutch two-sided CfDs) and active enforcement of existing commitments (German binding concessions). TotalEnergies is now expected to either develop or formally divest its 1.5 GW site under the BSH transfer framework.

Amazon — Skyborn 600 MW PPA for Gennaker (German Baltic, 976.5 MW); Largest German Offshore Corporate PPA to Date

On 22 June Skyborn Renewables confirmed a 600 MW corporate Power Purchase Agreement with Amazon for capacity from the 976.5 MW Gennaker offshore wind farm in the German Baltic (IPP Journal, BeBeez, MarketScreener coverage). The Gennaker project is valued at approximately €3bn and is targeted for commercial operation date in late 2028. The PPA is the largest German offshore corporate PPA to date and the most consequential European hyperscaler offshore PPA of 2026. In parallel on 26 June Uniper signed its first-ever offshore wind PPA covering 100 MW from the same Gennaker project (10-year initial term, MarketScreener coverage). The combined Amazon + Uniper PPAs underwrite approximately 700 MW of the Gennaker 976.5 MW capacity, leaving the remainder open for further corporate or utility offtake. The Amazon PPA structure signals an emerging continental hyperscaler-corporate-PPA market for German Baltic offshore wind and a structural complement to the parallel Dutch two-sided CfD programme.

> NES SALES OPPORTUNITY
>
> **Amazon — Skyborn Gennaker PPA Window for Continental Corporate Hyperscaler Offshore PPAs**
>
> NES Tier 2/3 suppliers in T&I, foundation fabrication, cable installation, marine warranty and operations should engage Skyborn (Hamburg) and the Gennaker EPC contractor team. The Amazon + Uniper PPA structure is now the principal continental hyperscaler-offshore-PPA template for 2026–2027 and the structural anchor for similar Dutch IJmuiden Ver corporate PPA conversations.

DeepOcean Completes Nordseecluster A Inter-Array Cable Installation and Testing (24 June)

On 24 June DeepOcean confirmed completion of inter-array cable installation and testing at RWE's Nordseecluster A offshore wind farm 50 km off Juist (windfair, OE Digital coverage). The Nordseecluster A campaign now joins the German T&I execution pipeline as one of the most advanced fixed-bottom installation programmes of 2026. The DeepOcean inter-array completion follows the first Vestas 15 MW turbine installation by DEME Norse Wind reported the previous week, and the DNV third BSH technical-conformity milestone certification. The full T&I framework includes Cadeler vessel-based logistics, DEME Marine Contractors topside lifting, Van Oord transport-and-installation, and DeepOcean inter-array cable installation — the principal continental Tier 1 framework holders for the campaign.

> NES SALES OPPORTUNITY
>
> **Nordseecluster A — Active Continental Inter-Array Cable Procurement Reference Project**
>
> NES Tier 2/3 suppliers in cable accessories, junction boxes, pull-in tools, dynamic riser engineering, ROV inspection, marine warranty and inter-array commissioning should reference the Nordseecluster A T&I framework for procurement engagement with RWE Renewables (Essen), DeepOcean (Haugesund), Van Oord (Rotterdam), DEME (Antwerp) and Cadeler (Copenhagen). The Nordseecluster A campaign is now an active continental T&I reference.

RWE Opens New Jemgum Offshore Control Centre, East Friesland (25 June)

On 25 June RWE Renewables formally opened a new offshore control centre at Jemgum in East Friesland (RWE press release coverage). The centre provides 24/7 monitoring for the German offshore wind fleet and the wider continental RWE portfolio with around 50 staff. Jemgum complements the existing RWE Borkum operations base and Den Helder hub and represents the principal continental offshore-wind operations infrastructure expansion of Q2 2026. The Jemgum centre is the operating-phase complement to the German manufacturing-phase signal delivered by the 50Hertz / Siemens Energy / NSORe Rostock-Vlissingen HVDC platform award the previous week.

BSH Proposes Federal Spatial Plan Amendments for N-10.1, N-10.2, N-13.1, N-13.2 (4 GW for 2027 Auction)

On 23 June the German Federal Maritime and Hydrographic Agency (BSH) proposed Federal Spatial Plan amendments for sites N-10.1, N-10.2, N-13.1 and N-13.2 — combined approximately 4 GW for the 2027 offshore wind auction (Windtech International coverage). The proposed amendments confirm the German federal-level commitment to the 30 GW by 2030 and 70 GW by 2045 targets and provide the structural site-availability anchor for the German auction calendar through 2027–2028. The BSH proposed FEP amendments are open to consultation through Q3 2026.

Germany EEG 2027 Reform and Netzpaket — Slipped from 24 June Cabinet to July

The German EEG 2027 reform package and accompanying Netzpaket (grid package) slipped from the planned 24 June Cabinet adoption to July (windfair coverage 25 June). The slip reflects coalition negotiation around the design of bilateral Contracts for Difference for offshore wind, onshore wind community-benefit provisions and grid charge restructuring. The slip is consistent with the Bundesrat 12 June resolution urging WindSeeG amendment before the summer recess and the parallel rejection of TotalEnergies' NSE2 return request. The German Federal Network Agency separately awarded 2.499 GW of onshore wind in the May 1 2026 auction (Windtech International 26 June).

Sweden — County Administrative Board of Skåne Backs Sjöllen Offshore Wind in Öresund (Geoharvey 26 June)

On 26 June the County Administrative Board of Skåne reversed its previous position and formally backed the Sjöllen offshore wind project in the Öresund strait between Sweden and Denmark (Geoharvey coverage). The Sjöllen project is the principal Skåne offshore wind project in the consenting pipeline and the County Administrative Board's reversal is the most material Swedish offshore wind consenting signal of Q2 2026, following the broader pattern of materially downgraded Swedish floating prospects in the TGS / 4C Q2 attractiveness ranking. The Sjöllen progression also follows the previous week's announcements of the Skyborn Skidåsen and Skidåsen Norra applications in the central Baltic.

France — TotalEnergies Files Centre Manche Énergies Authorisation (1.5 GW Normandy, €4.5bn)

On 26 June TotalEnergies confirmed it has filed the Centre Manche Énergies authorisation application with the French Maritime Prefecture and the DGEC (Ocean News coverage). The Centre Manche Énergies project is 1.5 GW off the Normandy coast, with a total project value of approximately €4.5bn and a target annual generation of 6 TWh. The project is positioned to create approximately 2,500 jobs during the construction phase, with explicit focus on European suppliers in line with the broader French AO9/AO10 European-content procurement framework. The filing arrives in parallel with the French AO10 11-project breakdown (information requests until 19 July, bids 12 October 2026, ministerial awards February 2027) and consolidates the French offshore wind procurement pipeline as the largest single European jurisdiction.

ORLEN — 50 of 76 Turbines Installed at Baltic Power, Poland's First Offshore Wind Farm (22 June)

On 22 June ORLEN confirmed that 50 of the 76 turbines have now been installed at Baltic Power, Poland's first offshore wind farm (ORLEN press release). The Baltic Power project is a joint venture between ORLEN and Northland Power and is targeting first power in H2 2026 and full operation in 2027. The 50-turbine milestone is the principal Polish offshore wind execution event of June 2026 and confirms the Baltic Power campaign as the most advanced commercial-scale offshore wind installation programme in the Polish Baltic. The campaign uses Cadeler vessel-based logistics, Van Oord transport-and-installation, and Vestas 15 MW turbines, with NKT cable supply.

Germany Bundesrat Offshore Wind Reform Resolution — BWO Urges Two-Sided CfDs (Baltic Wind 21 June)

On 21 June the German Bundesrat offshore wind reform resolution was formally reported by Baltic Wind, with the German offshore wind industry association BWO (Bundesverband der Windparkbetreiber Offshore) urging the introduction of two-sided Contracts for Difference. The BWO position aligns with the Bundesrat 12 June resolution urging WindSeeG amendment before the summer recess and reinforces the structural pattern of continental offshore wind procurement returning to two-sided CfDs. WindEurope separately called for a binding 2040 renewables target ahead of the 26 June EU Energy Council meeting in Luxembourg.

2. Offshore Wind — Floating

METCentre TetraSpar Demonstrator (Stiesdal + RWE + TEPCO) to Be Decommissioned Summer 2026

The METCentre TetraSpar floating wind demonstrator — a Stiesdal Offshore Technologies design jointly funded by RWE and TEPCO Renewable Power and operational since 2021 — is to be decommissioned in summer 2026 after five years of operation. The decommissioning marks the end of the world's first commercial-scale TetraSpar floating demonstration and a structural data-recovery moment for the European floating wind sector. The 3.6 MW Siemens Gamesa SG 3.6-130 turbine and the TetraSpar substructure will be removed; recovery and analysis of the operational data is the principal commercial-scale floating-wind learning outcome of 2026. The TetraSpar concept survives in scaled-up form in the parallel Stiesdal industrialised substructure portfolio and remains a candidate technology for the French AO10 floating projects.

Enova — Five Companies Apply for NOK 9bn Floating Wind Demonstration Funding

The Norwegian state enterprise Enova confirmed during the week that five companies have applied for the NOK 9bn floating wind demonstration funding programme. The applications are now under technical review and will inform Enova's award decisions through Q3 2026. The Enova programme is the principal Norwegian floating wind demonstration funding mechanism and complements the Utsira Nord NKr35bn subsidy programme (Storting 9 June vote, NVE consultation closed 18 June, external QA exercise underway). The combined Enova demonstration funding and Utsira Nord subsidy programme remain the principal Norwegian floating wind procurement architecture for the 2030–2033 commissioning window, with timeline pressure now publicly flagged by Norwegian Offshore Wind CEO Arvid Nesse.

Windeed (Swedish) — BVGA Independent Review Validates Materially Lower LCOE Than Typical Second-Generation Floating Designs

Windeed, the Swedish floating wind technology developer, confirmed during the week that an independent technical and commercial review by BVGA (the leading European offshore wind economics consultancy) has validated a materially lower Levelised Cost of Energy than typical second-generation floating wind designs. The BVGA review is the most rigorous independent LCOE validation of a Swedish floating wind concept published in 2026 to date and positions Windeed as a candidate technology for the French AO10 floating projects, the Enova demonstration programme, and the Norwegian Utsira Nord subsidy programme. The BVGA validation comes during a quarter of structural LCOE pressure on second-generation floating designs (TGS / 4C Q2 attractiveness ranking, Menon / TGS|4C 180,000 FTE / €26bn GVA study).

Equinor Closes Tokyo Office, Exits Japanese Offshore Wind by End-2026 (Marketscreener 26 June)

On 26 June Equinor confirmed it will close its Tokyo office and exit Japanese offshore wind by end-2026 (Marketscreener coverage). The Japan exit follows Equinor's 16 June decision to drop its 2030 installed capacity target and reflects continued strategic refocusing on the Norwegian Continental Shelf, the UK offshore wind market, and selected continental European positions. The Equinor strategic refocusing is consistent with the broader continental offshore wind procurement reset towards two-sided CfDs and binding concession enforcement, and signals continued Norwegian capital recycling from international wind exposure back into NCS subsea engineering and Troll / Johan Sverdrup capacity-extension.

> NES SALES OPPORTUNITY
>
> **Equinor Strategic Refocusing — NCS Subsea EPCI Engagement Window**
>
> NES Tier 2/3 suppliers in subsea production trees, manifolds, jumpers, umbilicals, controls, dynamic risers, ROV inspection and Troll / Johan Sverdrup host-platform interface engineering should anticipate increased Equinor procurement engagement during H2 2026 as Tokyo office closure and 2030 wind target removal complete. Aker Solutions, OneSubsea-SLB, Subsea7 and DeepOcean are the principal continental subsea framework holders.

3. Hydrogen

Shell FID on REFHYNE II — 100 MW PEM Electrolyser at Rheinland, Wesseling (24 June)

On 24 June Shell confirmed final investment decision on REFHYNE II — a 100 MW PEM electrolyser at the Shell Rheinland refinery in Wesseling, Germany (Shell press release). The electrolyser will produce up to 44,000 kg of green hydrogen per day for operations in 2027. Partners are ITM Power (electrolyser stacks), Linde (engineering and integration), TECNALIA (Spanish research and technology organisation) and SINTEF (Norwegian research organisation). REFHYNE II is the largest German refinery-integrated electrolyser FID of 2026 to date and the principal PEM commercial-scale event for ITM Power in continental Europe. It builds on the operational 10 MW REFHYNE I electrolyser at the same site (operational 2021) and provides the structural commercial-scale anchor for ITM Power’s industrial growth strategy.

> NES SALES OPPORTUNITY
>
> **REFHYNE II — 100 MW PEM Engineering and Integration Procurement Window**
>
> NES Tier 2/3 suppliers in process engineering, instrumentation, electrolyser stack support, balance-of-plant, hydrogen compression, RFNBO certification and integration engineering should engage Shell (The Hague / Rheinland), ITM Power (Sheffield), Linde (Munich), TECNALIA (Bilbao) and SINTEF (Trondheim) procurement teams. The FID-to-operations 2027 window opens immediate procurement engagement.

Hy2gen Nordic Albatros (Kassø, Denmark) Selected for European Hydrogen Bank Support — €0.97/kg, 144,000 t over 10 Years

On 26 June Hy2gen confirmed that its Nordic Albatros project in Kassø, Denmark, has been selected for European Hydrogen Bank support (World Energy, H2Tech coverage). The Nordic Albatros project covers a 100 MW electrolyser producing 144,000 tonnes of green hydrogen over 10 years. The successful bid price is €0.97/kg, with operations from 2031. The Hy2gen Nordic Albatros selection adds to the Danish-German cross-border RFNBO procurement stack and confirms Denmark as the principal European RFNBO production geography (European Energy AaaS 25 + Engie + Everfuel + now Hy2gen). The €0.97/kg bid is consistent with the broader European Hydrogen Bank price trajectory and signals continued commercial viability for Danish-anchored RFNBO at scale.

Plug Power Completes 5 MW PEM Commissioning at European Energy’s Måde PtX Facility, Esbjerg (RFNBO ISCC)

During the week Plug Power confirmed completion of commissioning of a 5 MW PEM electrolyser at European Energy’s Måde Power-to-X facility in Esbjerg, Denmark (Plug Power press release, BriefGlance coverage 24–26 June). The facility will produce 550 metric tonnes of RFNBO-certified ISCC-compliant green hydrogen per year. The Plug Power Måde commissioning is the principal continental Plug Power commercial-scale operational milestone of 2026 to date and complements the broader European Energy Danish RFNBO procurement programme.

European Commission Opens TEN-E PCI/PMI Call for Hydrogen, Electrolyser, CO2 Projects Until 30 September 2026

On 25 June the European Commission formally opened the TEN-E (Trans-European Networks for Energy) Projects of Common Interest and Projects of Mutual Interest call for hydrogen, electrolyser and CO2 transport / storage projects. The call closes 30 September 2026, with successful projects added to the next PCI/PMI list expected for adoption in Q1 2027. The TEN-E call is the principal continental hydrogen infrastructure policy-engagement window of Q3 2026 and the structural anchor for the cross-border

European hydrogen pipeline architecture (Delta Rhine Corridor, AquaDuctus, Baltic Sea Hydrogen Collector).

> **NES SALES OPPORTUNITY**
>
> **TEN-E PCI/PMI Call Open Until 30 September 2026 — Hydrogen, Electrolyser, CO2 Projects**
>
> NES Tier 2/3 suppliers and consortium members in hydrogen pipeline engineering, compression, metering, hydrogen-blending, electrolyser integration, CO2 pipeline and CO2 storage architecture should engage the European Commission DG ENER PCI/PMI team and the principal continental hydrogen TSO consortia (Gasunie, OGE, Fluxys, Gasgrid Finland, Nordion Energi, Energinet, ENAGAS) during the 25 June to 30 September call window.

Luxembourg LuxHyVal FID — Enovos 5 MW Electrolyser, Construction Q4 2026, Operations 2027

On 25 June Luxembourg gas and power utility Enovos confirmed final investment decision on the LuxHyVal project — a 5 MW electrolyser to begin construction in Q4 2026 with operations in 2027 (Chronicle coverage). LuxHyVal is the principal Luxembourg-anchored hydrogen project to reach FID in 2026 and the structural complement to the broader Benelux green hydrogen procurement architecture (Holland Hydrogen 1, NorthH2, Belgian hydrogen backbone).

OMV Petrom — 20 MW Electrolyser Delivery Complete at Petrobrazi, Romania; 35 MW Second Project in Development

On 25 June OMV Petrom confirmed completion of delivery of the 20 MW electrolyser at the Petrobrazi refinery in Romania (Business Forum coverage). The electrolyser will produce 3,000 tonnes of green hydrogen per year with €21m of PNRR funding support. A second 35 MW electrolyser project is now in development. The Petrobrazi delivery is the principal Romanian green hydrogen commercial-scale milestone of 2026 to date and consolidates Romania as a structural southern European RFNBO production geography.

EU Hydrogen Mechanism First Matching Round Results — 265 Supply Options from 33 Countries, 87% Matched

On 24 June RÖDL coverage confirmed the first matching round results of the EU Hydrogen Mechanism: 265 supply options from 33 countries against 45 demand-side projects, with 87% of supplies matched. The Hydrogen Mechanism is the European Commission’s flagship hydrogen demand-aggregation platform and complements the European Hydrogen Bank auction mechanism. The 87% match rate confirms continued European hydrogen supply liquidity and signals that the principal procurement bottleneck has shifted from supply availability to demand commitment and offtake security — consistent with the parallel European Hydrogen Bank 4th auction draft terms (PV Magazine 26 June: terms expected before end-June, launch end-2026).

HydrogenPro Q1 Update — 220 MW ACES Utah Complete; SALCOS Salzgitter 100 MW Exclusive Supply Ongoing

On 23 June HydrogenPro published its Q1 2026 trading update (Investegate coverage). Key milestones: the 220 MW ACES Utah project is complete; the 100 MW SALCOS Salzgitter exclusive electrolyser supply contract remains ongoing through 2026–2027. HydrogenPro’s Q1 update positions the company as a structural continental commercial-scale alkaline electrolyser supplier to the German green-steel programme and a candidate technology for the European Hydrogen Bank 4th auction supply pipeline.

4. CCUS — Carbon Capture, Use & Storage

BioCirc Opens World's Largest Biogas-Based CCS Facility at Vesthimmerland, Jutland (32,500 t/yr)

On 24 June BioCirc formally opened the world's largest biogas-based CCS facility at Vesthimmerland in northern Jutland, Denmark (Bioenergy News coverage). The facility captures 32,500 tonnes of CO2 per year from biogas operations and delivers the captured CO2 by ship to the INEOS Greensand offshore storage site in the Danish North Sea. The Vesthimmerland facility is the principal European biogas-based CCS commercial-scale opening of 2026 and signals the structural commercial maturation of the biogas-CCS value chain. Carbon Herald and the Danish trade press confirm the operational data.

BioCirc – Microsoft 7-Year 650,000 tCO2 Deal — 100,000 CRUs/yr from H2 2026 to 2032

In parallel with the Vesthimmerland opening, BioCirc and Microsoft signed a 7-year deal for 650,000 tonnes of CO2 removal — 100,000 Carbon Removal Units per year from H2 2026 to 2032 (Ritzau, DataCenterDynamics coverage 23–24 June). The BioCirc – Microsoft deal is the largest European biogas-based CCS commercial offtake of 2026 and the structural commercial complement to the Vesthimmerland operational opening. The deal underwrites BioCirc's commercial-scale build-out and signals continued Microsoft commitment to high-permanence European-anchored carbon removal credits, consistent with Microsoft's broader portfolio approach (Northern Lights JV, Ervia Cork-Iceland, parallel direct-air-capture commitments).

> NES SALES OPPORTUNITY
>
> **BioCirc Vesthimmerland — 32,500 t/yr CCS Commercial Operations Engineering Procurement Window**
>
> NES Tier 2/3 suppliers in CO2 liquefaction, CO2 storage tanks, ship-to-shore CO2 interface engineering, marine-loading-arms, LCO2 carrier-grade engineering, environmental monitoring and ISO 27915 CCS commercial-scale operational support should engage BioCirc (Aarhus), INEOS Greensand (Esbjerg / London) and the shipping operator for the Vesthimmerland – Greensand CO2 corridor.

Flanders Unveils €2bn Industrial Decarbonisation Plan with Carbon Capture Focus (26 June)

On 26 June the Flemish Government unveiled a €2bn industrial decarbonisation plan with carbon capture at its core (Belga News coverage). The plan supports decarbonisation of the Antwerp-Ghent industrial cluster and underwrites continued Flemish commitment to the Antwerp@C carbon capture programme and broader continental CO2 transport-and-storage architecture (Porthos, Aramis, Northern Lights JV connection). The Flemish plan is consistent with the broader European Commission Industrial Carbon Management Strategy and reinforces the structural pattern of European CCUS investment moving from first-of-a-kind capture-only demonstration into commercial-scale transport-and-storage build-out.

Porthos CCS — Three Maasvlakte Compressor Stations Progressing; Operational Start Slips to 2027

On 23 June S&P Global confirmed that construction of the three Porthos CCS compressor stations at Maasvlakte is progressing, with the operational start now pushed back from late 2026 into 2027. Porthos remains targeted for 2.5 Mtpa CO2 transport-and-storage from 2027. The Porthos slip is consistent with the broader pattern of European CCS commercial-scale operations risk and reinforces the Brevik CCS reality-check signal from the previous week. The Aramis CCS project separately received its Shell permit nearly three years after the original application (June 2023 to May 2026), targeting FID in 2027 (CATF, S&P Global). The Greensand storage permit was confirmed in December 2025 with first injection in 2027 at 0.4 Mtpa.

EU CO2 Storage 2030 Target Will Be Missed by ~35% — CATF Analysis

On 22 June CleanThinking published the CATF (Clean Air Task Force) analysis confirming that the EU CO2 storage 2030 target will be missed by approximately 35% on current project execution trajectories. The CATF analysis aggregates the Porthos, Aramis, Greensand, Northern Lights JV, Ravenna and Polish onshore CCS pipeline and confirms that the structural delivery gap is concentrated in commercial-scale operations execution rather than first-of-a-kind capture-only engineering. The Italian Ravenna CCS project is planning FID in 2026 with operations targeted for 2029. The CATF analysis is the most rigorous independent EU CCS delivery-gap analysis of Q2 2026 and reinforces the structural pattern of European CCUS investment now requiring commercial-scale operations engineering, marine logistics and storage build-out.

> NES SALES OPPORTUNITY
>
> **EU CCS Delivery Gap — Commercial-Scale Operations Engineering Procurement Priority**
>
> NES Tier 2/3 suppliers in CO2 transport engineering, ship-to-shore CO2 interface, marine-loading-arms, LCO2 carrier compression, CO2 well integrity, CO2 metering, CO2 storage tank engineering and ISO 27915 operational support should engage Porthos (Rotterdam), Aramis (Rotterdam), Northern Lights JV (Stavanger), Greensand (Esbjerg), Ravenna CCS (Milan / Ravenna) and the Polish onshore CCS pipeline. The 35% delivery gap signals continued material commercial-scale procurement opportunity through 2030.

EU CRCF Buyers' Club Goes Live — Open Survey (23 June)

On 23 June the European Commission Carbon Removal and Carbon Farming (CRCF) Buyers' Club platform went live with an open survey. The CRCF Buyers' Club is the European Commission's structural mechanism to aggregate demand for high-permanence European-anchored carbon removal credits and complements the parallel European Hydrogen Bank and CCS storage procurement architecture. Carbon Management Europe separately published its response to the Industrial Accelerator Act consultation on 18 June.

5. Marine Energy

A quiet week for European marine-energy commercial announcements. The principal commercial-scale event of the period was the SolarDuck + MARIN award of €3.2m subsidy from the Dutch national enterprise agency RVO for the Steady Seas research project — an offshore floating power hub combining offshore solar, wind and storage. The Steady Seas project is the principal continental offshore floating power hub research procurement of Q2 2026. The Ocean Energy Europe annual global ocean-energy resource report scheduled for publication on 29 June 2026 remains the principal continental marine-energy commercial-reference document and the structural commercial-signal moment of Q3 2026.

> NES SALES OPPORTUNITY
>
> **Ocean Energy Europe 29 June Report — Continental Marine-Energy Commercial Reference Document**

NES suppliers in wave, tidal, dynamic mooring, dynamic cabling, subsea connectors, marine-environmental monitoring and survival-design engineering should reference the Ocean Energy Europe 29 June 2026 annual report for the Q3 2026 commercial-positioning window. The September 2026 CEF Energy call and the OPEN SEA demonstrator call remain the principal procurement vehicles.

6. Hydropower

A quiet week for European hydropower commercial announcements. The International Hydropower Association launched its 2026 World Hydropower Outlook on 24 June. The publication aggregates the global hydropower commercial-scale and pumped-storage pipeline through 2030 and confirms continued continental pumped-storage development momentum in Bulgaria (ten newly identified sites), Switzerland (Nant de Drance operational), Austria (Limberg III ongoing) and Portugal (Iberdrola Tâmega complex operational). The 2026 World Hydropower Outlook is the principal continental hydropower commercial-reference document of Q3 2026 and the structural anchor for the September 2026 CEF Energy call hydropower bid construction.

7. Geothermal

Vulcan Energy — €2.2bn Lionheart Financing Finalised; Construction Underway at Landau + Frankfurt Industriepark Höchst

On 26 June Vulcan Energy confirmed that the €2.2bn Lionheart financing has been finalised, with construction now underway both at Landau and at the Frankfurt Industriepark Höchst integrated geothermal-lithium plant (Ad-hoc-News coverage). The Lionheart programme targets 24,000 tonnes per year of lithium hydroxide monohydrate ($LiOH{\cdot}H2O$) at full production. Vulcan Energy separately confirmed the sale of its A-DLE pilot plant to EAU Lithium for €1m, and the CEO and director performance rights ASX filings were lodged on 24 June. The Lionheart financing finalisation is the principal European integrated geothermal-lithium commercial-scale execution milestone of 2026 to date and consolidates Vulcan Energy as the European Tier 1 integrated geothermal-lithium operator.

NES SALES OPPORTUNITY

Vulcan Lionheart €2.2bn Construction Engineering Procurement Window

NES Tier 2/3 suppliers in deep-well drilling, well integrity, downhole tools, brine handling, ORC, district-heating-interface engineering, lithium electrolysis, hydrogen-fired downstream processing and integrated chemical-plant engineering should engage Vulcan Energy (Karlsruhe), the Landau site team and the Industriepark Höchst (Frankfurt) project team. €2.2bn anchors a multi-year commercial-scale engineering procurement window.

Eavor Wins CleanTech Innovation of the Year 2026

On 26 June Eavor Technologies confirmed it has won the CleanTech Innovation of the Year 2026 award (indovizka coverage). The award follows the previous week's TIME #2 GreenTech recognition and consolidates the structural commercial-credibility signal for Eavor-Loop continental and global pipeline development (Geretsried operational, additional German sites, New Mexico, Japan). The CleanTech

Innovation of the Year 2026 is the principal continental geothermal commercial-reference award of Q2 2026.

EGEC Publishes Joint Letter to EU Energy Ministers (22 June)

On 22 June the European Geothermal Energy Council (EGEC) published a joint letter to EU Energy Ministers ahead of the 26 June Luxembourg Energy Council. The letter sets out the geothermal sector's policy priorities for the European Commission's end-July 2026 clean-energy package, building on the EGEC EUSEW session of 9 June and the 18 June "Geothermal in the Industrial Accelerator Act" position paper. The joint letter is the principal continental geothermal policy publication of late June 2026 and the structural input to the expected end-July Commission package.

8. Decommissioning & Norwegian Continental Shelf

Vår Energi Sanctions Gjøa Subsea Projects — Ofelia + Gjøa Nord + Cerisa, ~76 MMboe, $1.42bn (NOK 14bn)

On 25 June Vår Energi formally sanctioned the Gjøa Subsea Projects — a combined development of the Ofelia, Gjøa Nord and Cerisa discoveries. The gross 2P recoverable volume is approximately 76 MMboe with total investment of approximately $1.42bn (NOK 14bn). First oil from Cerisa is targeted for 2027, with Ofelia and Gjøa Nord coming on stream in H2 2028. The project is a subsea tieback to the existing Gjøa semi-submersible platform and the Duva field infrastructure. Partners across the licences are Vår Energi as operator together with Harbour Energy, Petoro, OKEA, INPEX, ORLEN, DNO, Aker BP and Pandion (World Oil 25 June; S&P Global; MarketScreener). The Gjøa Subsea Projects FID is the most consequential NCS commercial-scale subsea decision of June 2026 and reinforces the structural pattern of NCS subsea capacity-extension delivery against the Vår Energi, Equinor and Aker BP investment programmes through 2028.

> NES SALES OPPORTUNITY
>
> **Gjøa Subsea Projects — ~76 MMboe Multi-Operator Subsea Procurement Window Now Open**
>
> NES Tier 2/3 suppliers in subsea production trees, manifolds, jumpers, umbilicals, controls, dynamic risers, ROV inspection, P&A engineering, well intervention, completion fluids and Gjøa / Duva host-infrastructure interface engineering should engage Vår Energi (Stavanger), Harbour Energy (London / Stavanger), Petoro (Stavanger), OKEA (Trondheim), INPEX (Tokyo / Stavanger), ORLEN (Warsaw), DNO (Oslo), Aker BP (Lørenskog) and Pandion (Stavanger). The combined seven-licence partner stack is the most engaged single multi-operator NCS subsea procurement event of June 2026.

Equinor TWIN Project — NOK 4bn to Troll for 11 bcm Additional Gas, 2028 Startup

On 23 June Equinor and partners committed NOK 4bn to the Troll TWIN project (WebWire, Enerdata, Oil & Gas Journal, Yahoo Finance coverage). TWIN will bring an additional 11 bcm of gas from the Troll field into production with a 2028 startup, anchoring continued Troll plateau delivery through the late-2020s. Partners are Equinor 30.55%, Petoro 55.93%, Shell 8.19%, TotalEnergies 3.69% and ConocoPhillips 1.64%. The Troll TWIN commitment reinforces the structural pattern of NCS subsea engineering pipeline delivery through 2028 and consolidates continued Aker Solutions, OneSubsea, Subsea7 and DeepOcean engagement on the Troll host-platform interface.

Equinor Advances Johan Sverdrup Phase 4 — Tonjer + Geitungen Subsea Tieback Toward 2029

On 23 June JPT confirmed that Equinor is advancing Johan Sverdrup Phase 4 — a subsea tieback covering the Tonjer and Geitungen discoveries with combined recoverable volumes of 20–30 MMboe and startup targeted for 2029. The Phase 4 advancement is the structural complement to the Troll TWIN commitment and the Gjøa Subsea Projects FID and signals continued Equinor execution-mode delivery against the NCS subsea engineering pipeline through 2028–2029.

Equinor Submits Wisting EIA — ~500 MMboe Barents Sea; Power-from-Shore Dropped (25 June)

On 25 June Equinor submitted the Environmental Impact Assessment for the Wisting field in the Barents Sea — an undeveloped oil discovery of approximately 500 MMboe (Offshore Energy, World Oil coverage). The EIA opens a 16-week consultation period and Equinor targets FID by end-2027. In parallel, Reuters confirmed on 25 June that Equinor has dropped its power-from-shore plan for Wisting on cost and execution grounds. The Wisting EIA submission is the principal Barents Sea commercial-scale environmental-consenting milestone of June 2026 and signals continued long-cycle NCS development engagement north of the Arctic Circle.

> NES SALES OPPORTUNITY
>
> **Wisting EIA — 16-Week Consultation; FID End-2027; Barents Sea Long-Cycle Engineering**
>
> NES Tier 2/3 suppliers in Arctic-rated subsea engineering, ice management, oil spill response, environmental monitoring, dynamic mooring, Arctic-rated dynamic cabling, harsh-environment FPSO interface and Barents Sea logistics should engage Equinor (Stavanger / Harstad) during the 25 June to mid-October consultation period. FID by end-2027 opens a multi-year long-cycle engineering procurement window through to 2032.

Vår Energi Multi-Asset NCS Deals — Pandion Stakes, DNO Swap, Goliat 20% to ORLEN, Fenja 25% to Concedo (up to $350m)

Across 22–24 June Vår Energi executed multiple NCS multi-asset deals (Rigzone, DNO, Simply Wall St coverage): acquiring Pandion stakes, swapping assets with DNO, farming down 20% of Goliat to ORLEN and 25% of Fenja to Concedo for total consideration up to $350m. The deal cluster confirms continued Vår Energi portfolio optimisation focused on operated subsea capacity-extension delivery, with the parallel Ocean Installer / Moreld EPCI award for Balder Next New Wells confirming the structural commercial-scale operational execution alongside the portfolio restructuring.

Aker Solutions — 5-Year Cenovus White Rose Engineering + Maintenance (NOK 0.5–1.5bn) and Equinor Kvitebjørn / Atlantis FEED

On 26 June Aker Solutions confirmed a 5-year engineering and maintenance agreement with Cenovus Energy for the White Rose project offshore Canada — classified “sizeable” at NOK 0.5–1.5bn. In parallel, Aker Solutions confirmed a FEED contract from Equinor for the Kvitebjørn / Atlantis subsea tie-in on the NCS. The combined awards reinforce Aker Solutions’ structural commercial-scale execution-mode position. Aker Solutions Q1 2026 order intake was NOK 28.8bn against backlog of NOK 80.2bn, confirming continued robust commercial-scale order book delivery into 2026–2028.

Subsea7–Saipem Merger — Brazil CADE Clears Without Restrictions (23 June)

On 23 June Brazil’s antitrust authority CADE cleared the Subsea7–Saipem merger without restrictions (OE Digital, MarketScreener coverage). The Brazilian clearance is the most consequential remaining regulatory approval for the merger and signals deal completion in H2 2026. Morgan Stanley separately named Subsea7 its Top Pick during the week. The combined Saipem7 entity will be the largest European subsea-services group and the principal commercial counterparty for European Tier 2/3 subsea supply-chain engagement through 2027 and beyond — a structural commercial-scale signal for NES Aberdeen-anchored Tier 2/3 capability transfer engagement.

> NES SALES OPPORTUNITY
>
> **Subsea7–Saipem (Saipem7) Post-Merger Framework Re-Positioning Window**
>
> NES Tier 2/3 suppliers in subsea production trees, manifolds, jumpers, umbilicals, controls, dynamic risers, ROV inspection, P&A engineering, well intervention, completion fluids, marine warranty, vessel-engineering, dynamic positioning, ship-to-shore engineering and broader subsea EPC should engage Subsea7 (Westhill / London / Stavanger) and Saipem (Milan / Stavanger) procurement teams during H2 2026 ahead of the Saipem7 framework restructuring. Aberdeen Tier 2/3 capability transfers directly into the combined Saipem7 NCS, North Sea, Mediterranean and West Africa subsea procurement programme.

Norwegian SAFE Union Strike Escalates to Lockout from 22 June

The Norwegian SAFE union strike that started 15 June and escalated 18 June moved to formal lockout from 22 June (Norwegian trade-union and Norwegian Oil and Gas Association coverage). The lockout affects 1,272 of 1,770 SAFE members across SLB, DOF, Halliburton, Weatherford, Tios, DeepOcean, Subsea 7, Cactus, Vetco Gray Scandinavia and Baker Hughes. Four IMR vessels, one well-intervention vessel and two rigs are halted. The lockout is the most consequential Norwegian offshore labour disruption since 2020 and signals continued structural labour-cost and execution-risk pressure on the NCS subsea engineering pipeline.

Aker BP — Goldman Sachs Cuts to Sell NOK 260 (290); ABG Upgrades to Hold NOK 325 (300)

During the week Goldman Sachs cut Aker BP to sell with a target price of NOK 260 (down from NOK 290) and ABG Sundal Collier upgraded Aker BP to hold with a target price of NOK 325 (up from NOK 300). The mixed analyst signal reflects continued debate on Aker BP's NCS execution pipeline, dividend trajectory and refinancing requirements through 2026–2027. Aker BP's structural NCS execution pipeline remains intact with the Aker BP 36/4-2 NOD permit issued the previous week (Saipem Scarabeo 8, June 2026 spud).

Semco Maritime + INEOS 5-Year Framework for Danish North Sea Services

During the week Semco Maritime and INEOS signed a 5-year framework agreement covering Danish North Sea services from June 2026 to May 2031. The agreement underwrites continued Semco Maritime structural commercial-scale execution engagement against the Danish North Sea operations pipeline and consolidates Semco Maritime as a principal Tier 1 Danish offshore services framework holder. Wellesley Petroleum and partners separately confirmed a gas / condensate discovery in the North Sea offshore Norway on 24 June.

9. Industry & Policy

EU Energy Council — Luxembourg 26 June, 22 Ministers Adopt Position on European Grids Package

On 26 June the EU Energy Council met in Luxembourg under the Belgian presidency with 22 energy ministers in attendance. The Council adopted its position on the European grids package, focused on modernising networks, accelerating electrification and supporting integration of distributed energy resources (SolarPower Europe, Euronews, Finnish Government coverage). A storage tripartite agreement was also signed during the meeting. The Council position is the structural input to the European Commission end-July 2026 clean-energy package and the principal continental policy-engagement window for grid-architecture procurement through Q3 2026. The Council position is consistent with the parallel TEN-E PCI/PMI call opened 25 June (hydrogen, electrolyser, CO2 projects until 30 September 2026) and the EU Hydrogen Mechanism first matching round results (265 supply options, 87% matched).

> NES SALES OPPORTUNITY
>
> **EU Energy Council 26 June Grid Package — Continental Grid-Architecture Engineering Procurement**
>
> NES Tier 2/3 suppliers in HVDC platform topside outfitting, MV/HV switchgear, transformer rooms, fire-and-gas, marine warranty, lifting equipment, scour protection, offshore commissioning, onshore substation engineering, HV cable engineering and broader grid-integration engineering should engage the European Commission DG ENER team and the principal continental TSO consortia during the 6-week window to the European Commission end-July clean-energy package.

4 July 2025 Czech Republic Grid Incident — ENTSO-E Expert Panel Final Report Released 26 June

On 26 June ENTSO-E released the final expert panel report on the 4 July 2025 Czech Republic grid incident. The report identifies the principal technical and operational causes and proposes corrective measures for continental grid resilience. The report is consistent with the broader continental grid-architecture engineering procurement priority signalled by the parallel EU Energy Council 26 June position and the TEN-E PCI/PMI call.

Bundesnetzagentur — May 1 Onshore Wind Auction 2.499 GW Awarded

On 26 June Windtech International confirmed that the Bundesnetzagentur (German Federal Network Agency) awarded 2.499 GW of onshore wind in the May 1 2026 auction. The award is the principal German onshore wind auction event of Q2 2026 and reinforces the structural pattern of continental onshore wind procurement against the broader EEG 2027 reform and the parallel offshore wind WindSeeG reform. The German Federal Network Agency continued to deliver auction-mode execution despite the parallel EEG 2027 reform and Netzpaket slip from 24 June to July.

Priority Action Table

The week to 27 June 2026 delivered the largest single Norwegian Continental Shelf commercial cluster of 2026 to date and a coordinated continental offshore wind procurement reset signal.

Ten NES sales opportunities from this week's briefing, ranked by commercial proximity. HIGH = engage in next 30 days; MEDIUM = engage in next 60–90 days; LOW-MED = position-building 6–12 months.

#	Opportunity	Sector	Target Counterparties	Window	Priority
1	Vår Energi Gjøa Subsea Projects FID — ~76 MMboe Ofelia + Gjøa Nord + Cerisa	Decom / NCS	Vår Energi, Harbour Energy, Petoro, OKEA, INPEX, ORLEN, DNO, Aker BP, Pandion	~$1.42bn; Cerisa 2027, Ofelia + Gjøa	**HIGH**

				Nord H2 2028	
2	Equinor Troll TWIN — NOK 4bn for 11 bcm gas, 2028 startup	Decom / NCS	Equinor, Petoro, Shell, TotalEnergies, ConocoPhillips, Aker Solutions, Subsea7	NOK 4bn; FID complete; EPC into 2027	**HIGH**
3	Shell REFHYNE II FID — 100 MW PEM at Rheinland, 44,000 kg/day	Hydrogen	Shell, ITM Power, Linde, TECNALIA, SINTEF	Operations 2027; engineering procurement open now	**HIGH**
4	Subsea7–Saipem (Saipem7) post-merger framework re-positioning	Decom / NCS	Subsea7, Saipem, Aker Solutions, OneSubsea-SLB	Completion H2 2026; framework reset H2 2026	**HIGH**
5	Netherlands IJmuiden Ver Gamma A/B FINAL terms — dual subsidy-free + CfD	Fixed-Bottom Wind	Crosswind, Ecowende, Zeevonk II, RWE-OW Ocean Winds, RVO	€4.75bn; tender 26 Nov–10 Dec 2026	**HIGH**
6	BioCirc Vesthimmerland 32,500 t/yr CCS + Microsoft 650,000 t deal	CCUS	BioCirc, Microsoft, INEOS Greensand, Northern Lights JV	Operational; 100,000 CRUs/yr 2026–2032	**HIGH**
7	Amazon — Skyborn Gennaker 600 MW PPA (German Baltic, 976.5 MW)	Fixed-Bottom Wind	Amazon, Skyborn, Uniper, Gennaker EPC contractors	€3bn project; COD late 2028	**MEDIUM**
8	Wisting EIA — ~500 MMboe Barents Sea; FID end-2027	Decom / NCS	Equinor (Stavanger / Harstad), Petoro, partners	16-week consultation; FID end-2027	**MEDIUM**
9	Hy2gen Nordic Albatros (Kassø) — 100 MW EHB at €0.97/kg	Hydrogen	Hy2gen, European Energy, Engie, EHB partners	144,000 t over 10 yrs from 2031	**MEDIUM**
10	Vulcan Energy Lionheart €2.2bn financing finalised	Geothermal	Vulcan Energy, Landau site, Industriepark Höchst (Frankfurt)	24,000 t/yr LiOH; multi-year engineering	**LOW-MED**

Sources Used

All sources used in the preparation of this briefing are listed below. Each link opens in your browser.

• Netherlands FINAL IJmuiden Ver Gamma A/B tender terms (Renewable Energy Industry) — https://renewableenergyindustry.com/news/article/netherlands-publishes-final-terms-for-ijmuiden-ver-gamma-tender

• Netherlands IJmuiden Ver Gamma dual-auction analysis (Westwood Global Energy Group) — https://www.westwoodenergy.com/news/insights/netherlands-ijmuiden-ver-gamma-tender-design-published

• Germany rejects TotalEnergies NSE2 concession return (Windtech International, 22 June) — https://www.windtech-international.com/industry-news/germany-rejects-totalenergies-request-to-return-nse2-concession

• Amazon — Skyborn Gennaker 600 MW PPA (IPP Journal) — https://www.ipp-journal.de/index.php?nlid=1&seite=2

• Amazon — Skyborn Gennaker 600 MW PPA (BeBeez) — https://bebeez.eu/?p=84841

• Uniper signs first-ever offshore wind PPA — 100 MW Gennaker (MarketScreener) — https://www.marketscreener.com/news/uniper-signs-first-ever-offshore-wind-ppa-with-skyborn-gennaker

• DeepOcean completes Nordseecluster A inter-array cable installation (windfair) — https://w3.windfair.net/wind-energy/news/49105-deepocean-completes-rwe-nordseecluster-a-inter-array-cable-installation

• RWE opens Jemgum offshore control centre, East Friesland (RWE) — https://www.rwe.com/en/press/rwe-renewables-europe-australia/2026-06-25-rwe-opens-new-offshore-control-centre-jemgum/

• Germany BSH proposes FEP amendments for N-10.1, N-10.2, N-13.1, N-13.2 (Windtech) — https://www.windtech-international.com/industry-news/germany-bsh-proposes-fep-amendments-for-2027-offshore-wind-auction

• Germany EEG 2027 reform and Netzpaket slipped to July (windfair, 25 June) — https://w3.windfair.net/wind-energy/news/49112-germany-eeg-2027-reform-netzpaket-slipped-from-24-june-cabinet-to-july

• Sweden — County Administrative Board of Skåne backs Sjöllen offshore wind (Geoharvey) — https://geoharvey.com/swedish-county-administrative-board-of-skane-backs-sjollen-offshore-wind/

• France — TotalEnergies files Centre Manche Énergies authorisation (Ocean News) — https://oceannews.com/news/marine-renewables/totalenergies-files-centre-manche-energies-authorisation-1-5-gw-normandy

• ORLEN — 50 of 76 turbines installed at Baltic Power (ORLEN) — https://www.orlen.pl/en/about-the-company/media/press-releases/2026/june/orlen-baltic-power-50-of-76-turbines-installed

• Germany Bundesrat offshore wind reform resolution — BWO urges two-sided CfDs (Baltic Wind, 21 June) — https://balticwind.eu/germany-bundesrat-offshore-wind-reform-bwo-two-sided-cfds-21-june/

• Bundesnetzagentur May 1 onshore wind auction 2.499 GW awarded (Windtech, 26 June) — https://www.windtech-international.com/industry-news/germany-may-1-2026-onshore-wind-auction-2-499-gw-awarded

• METCentre TetraSpar floating wind demonstrator decommissioning summer 2026 (windfair) — https://w3.windfair.net/wind-energy/news/49069-metcentre-tetraspar-floating-wind-demonstrator-decommissioning-summer-2026

• Enova — 5 companies apply for NOK 9bn floating wind demonstration funding — https://w3.windfair.net/wind-energy/news/49074-enova-five-companies-apply-floating-wind-demonstration-funding

• Windeed (Swedish) — BVGA independent LCOE review — https://w3.windfair.net/wind-energy/news/49081-windeed-bvga-review-floating-wind-lcoe-validation

• Equinor closes Tokyo office, exits Japanese offshore wind by end-2026 (MarketScreener) — https://www.marketscreener.com/news/equinor-closes-tokyo-office-exits-japanese-offshore-wind-by-end-2026

• Shell takes FID on REFHYNE II 100 MW PEM electrolyser at Rheinland (Shell) — https://www.shell.com/news-and-insights/newsroom/news-and-media-releases/2026/shell-takes-final-investment-decision-on-refhyne-ii.html

• Hy2gen Nordic Albatros selected for European Hydrogen Bank support (World Energy) — https://www.world-energy.org/article/52391.html

• Hy2gen Nordic Albatros EHB selection at €0.97/kg (H2Tech) — https://www.h2-tech.com/news/2026/06-2026/hy2gen-nordic-albatros-european-hydrogen-bank-selection/

• Plug Power commissions 5 MW PEM at European Energy Måde PtX facility, Esbjerg — https://www.plugpower.com/news/plug-completes-commissioning-of-5-mw-pem-electrolyser-at-european-energy-made-ptx-facility-esbjerg/

• European Commission opens TEN-E PCI/PMI call (hydrogen, electrolyser, CO2 projects) — https://energy.ec.europa.eu/news/european-commission-opens-ten-e-call-hydrogen-electrolyser-co2-projects-2026-06-25_en

• Luxembourg LuxHyVal FID — Enovos 5 MW electrolyser (Chronicle, 25 June) — https://chronicle.lu/category/business/47298-luxembourg-luxhyval-fid-enovos-5-mw-electrolyser-construction-q4-2026

• OMV Petrom 20 MW electrolyser delivery complete at Petrobrazi (Business Forum, 25 June) — https://business-forum.com/article/2026/06/omv-petrom-completes-20-mw-electrolyser-delivery-petrobrazi

• EU Hydrogen Mechanism first matching round results — 87% matched (RÖDL, 24 June) — https://www.roedl.com/insights/eu-hydrogen-mechanism-first-matching-round-results-2026-06

• EU 4th Hydrogen Bank auction draft terms expected before end-June (PV Magazine, 26 June) — https://www.pv-magazine.com/2026/06/26/eu-4th-hydrogen-bank-auction-draft-terms-expected-end-june-launch-end-2026/

• HydrogenPro Q1 2026 trading update (Investegate, 23 June) — https://www.investegate.co.uk/announcement/hydrogenpro-q1-2026-trading-update

• BioCirc opens world's largest biogas-based CCS facility at Vesthimmerland (Bioenergy News, 24 June) — https://www.bioenergy-news.com/news/biocirc-opens-worlds-largest-biogas-ccs-vesthimmerland-jutland/

• BioCirc — Microsoft 7-year 650,000 t CO2 removal deal (DataCenterDynamics, 24 June) — https://www.datacenterdynamics.com/en/news/microsoft-signs-7-year-650000-tonne-carbon-removal-deal-biocirc-denmark/

• Flanders unveils €2bn industrial decarbonisation plan with carbon capture (Belga News, 26 June) — https://www.belganewsagency.eu/flanders-unveils-2bn-industrial-decarbonisation-plan-carbon-capture

• Porthos CCS three compressor stations progressing; operational start slips to 2027 (S&P Global, 23 June) — https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/electric-power/062326-porthos-ccs-compressor-stations-progress-operational-start-2027

• EU CO2 storage 2030 target will be missed by ~35% (CleanThinking / CATF, 22 June) — https://www.cleanthinking.de/ccs-eu-co2-storage-2030-target-missed-by-35-percent-catf-analysis/

• EU CRCF Buyers' Club platform goes live with open survey (European Commission, 23 June) — https://climate.ec.europa.eu/news-your-voice/news/eu-crcf-buyers-club-platform-goes-live-open-survey-2026-06-23_en

• Vulcan Energy €2.2bn Lionheart financing finalised; A-DLE pilot sale to EAU Lithium (Ad-hoc-News, 26 June) — https://www.ad-hoc-news.de/boerse/news/ueberblick/vulcan-energy-lionheart-financing-finalised-construction-landau-frankfurt-hoechst/69602251

• Eavor wins CleanTech Innovation of the Year 2026 (indovizka) — https://indovizka.com/2026/06/26/eavor-technologies-wins-cleantech-innovation-of-the-year-2026/

• EGEC publishes joint letter to EU Energy Ministers ahead of 26 June Energy Council — https://www.egec.org/news/egec-joint-letter-eu-energy-ministers-22-june-2026/

• Vår Energi sanctions Gjøa Subsea Projects — Ofelia + Gjøa Nord + Cerisa (World Oil, 25 June) — https://www.worldoil.com/news/2026/6/25/var-energi-sanctions-gjoa-subsea-projects-ofelia-gjoa-nord-cerisa-norwegian-north-sea/

• Vår Energi Gjøa Subsea Projects FID (S&P Global) — https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/oil/062526-var-energi-sanctions-gjoa-subsea-projects-norwegian-north-sea

• Equinor advances Johan Sverdrup Phase 4 — Tonjer + Geitungen subsea tieback (JPT, 23 June) — https://jpt.spe.org/equinor-advances-johan-sverdrup-phase-4-tonjer-geitungen-subsea-tieback

• Equinor TWIN project at Troll — NOK 4bn investment, 11 bcm gas, 2028 startup (Yahoo Finance / Oil & Gas Journal) — https://www.ogj.com/general-interest/companies/article/55301091/equinor-twin-project-troll-nok-4bn-11-bcm-gas-2028-startup

• Equinor submits Wisting field EIA — ~500 MMboe Barents Sea (Offshore Energy, 25 June) — https://www.offshore-energy.biz/equinor-submits-wisting-eia-500-mmboe-barents-sea-undeveloped-oil/

• Equinor drops power-from-shore plan for Wisting (Reuters, 25 June) — https://www.reuters.com/business/energy/equinor-drops-power-from-shore-plan-wisting-barents-sea-2026-06-25/

• Vår Energi multi-asset NCS deals — Pandion, DNO swap, Goliat 20% to ORLEN, Fenja 25% to Concedo (Rigzone, 22 June) — https://www.rigzone.com/news/var_energi_multi_asset_ncs_deals_pandion_dno_goliat_orlen_fenja_concedo-22-jun-2026-184522-article/

• Ocean Installer (Moreld) awarded EPCI by Vår Energi for Balder Next New Wells (26 June) — https://www.moreld.com/news/2026/06/ocean-installer-awarded-epci-contract-by-var-energi-for-balder-next-new-wells

• Aker Solutions 5-year Cenovus White Rose engineering and maintenance agreement (26 June) — https://www.akersolutions.com/news-and-media/news-archive/2026/aker-solutions-five-year-agreement-cenovus-white-rose/

• Aker Solutions FEED contract from Equinor for Kvitebjørn / Atlantis subsea tie-in — https://www.akersolutions.com/news-and-media/news-archive/2026/aker-solutions-feed-equinor-kvitebjorn-atlantis-subsea-tie-in/

• Subsea7–Saipem merger — Brazil CADE clears without restrictions (OE Digital, 23 June) — https://www.oedigital.com/news/541127-subsea7-saipem-merger-brazil-cade-clears-without-restrictions

• Norwegian SAFE union strike escalates to lockout from 22 June (Norwegian Oil and Gas Association) — https://www.norskoljeoggass.no/en/news/2026/06/safe-union-strike-escalates-lockout-22-june-1272-of-1770-members/

• Aker BP analyst updates — Goldman Sachs cuts to sell NOK 260; ABG upgrades to hold NOK 325 — https://simplywall.st/community/narratives/no/energy/ob-akrbp/aker-bp-shares/updates/06-26-2026

• Semco Maritime + INEOS 5-year framework for Danish North Sea services — https://www.semcomaritime.com/news/semco-maritime-ineos-five-year-framework-agreement-danish-north-sea-services-june-2026/

• Wellesley Petroleum + partners confirm gas/condensate discovery offshore Norway (24 June) — https://www.wellesleypetroleum.no/news/2026/06/wellesley-partners-confirm-gas-condensate-discovery-offshore-norway/

• EU Energy Council Luxembourg 26 June — 22 ministers adopt position on European grids package (SolarPower Europe) — https://www.solarpowereurope.org/news/eu-energy-council-luxembourg-26-june-22-ministers-adopt-european-grids-package

• ENTSO-E final expert panel report on 4 July 2025 Czech Republic grid incident (26 June) — https://www.entsoe.eu/news/2026/06/26/final-expert-panel-report-czech-republic-4-july-2025-grid-incident/