EXPORTCENTRAL AI

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Editor's Brief

This week has brought landmark decisions across the global offshore low-carbon energy landscape, with Europe leading on hydrogen infrastructure planning while floating wind technology advances in Norway and marine energy achieves a world-first integration demonstration in Scotland. The European Commission's Grids Package, unveiled on 10 December, commits €240 billion to hydrogen network development through 2040, signalling unprecedented policy support for cross-border hydrogen infrastructure. Meanwhile, Norway approved two floating wind consortia for the 1.5 GW Utsira Nord project, accelerating commercial-scale floating technology development with up to $3.5 billion in state subsidies. In a technical breakthrough, Scotland's EMEC successfully demonstrated the world's first integration of tidal power, battery storage, and hydrogen production, proving the viability of hybrid renewable systems for coastal communities facing grid constraints.

One key number: €240 billion – the European Commission's investment allocation for hydrogen grids through 2040, representing the most substantial policy commitment to hydrogen infrastructure to date and creating a decade-long opportunity for offshore engineering, subsea, and hydrogen technology supply chains.

Action for this week: Companies should evaluate capabilities against the EU's newly announced hydrogen infrastructure priorities, particularly in subsea pipeline construction, compression systems, and hydrogen storage. The convergence of offshore wind expansion, hydrogen corridor development, and decommissioning-to-storage opportunities is creating integrated market opportunities that favor companies with cross-sector expertise in offshore operations, CCUS, and renewable energy infrastructure.

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1. Global Offshore Wind Developments

1.1 Europe – Norway Advances Commercial Floating Wind

The week's most significant offshore wind development came from Norway, which approved applications from two consortia for floating wind development at Utsira Nord, marking a critical step toward commercial-scale floating offshore wind deployment. On 10 December, Norway's Ministry of Energy announced that both Equinor-Vårgrønn and the Deep Wind Offshore Norway-EDF Renewables joint venture had been awarded project areas of up to 500 MW each, totalling 1.5 GW of floating wind capacity.

The decision came earlier than expected, with the Ministry having originally planned to announce awards in the first half of 2026. Located off the coast of Rogaland in southwestern Norway, the Utsira

Nord site features water depths that make fixed-bottom foundations impractical, necessitating floating wind technology. The two consortia now have two years to submit project-specific impact assessment programs, conduct full assessments, and apply for development licenses.

Critically, the Norwegian government has allocated NOK 35 billion (approximately $3.5 billion) in maximum state aid available for the projects. If both groups proceed to the subsidy auction phase, support will be granted to the consortium requiring the lowest level of state assistance to develop its project. Minister of Energy Terje Aasland emphasized that "these projects will contribute to developing floating offshore wind technology and increasing renewable power generation in South-West Norway".

This development is strategically significant for the global floating wind sector. Norway has set an ambitious target of 30 GW of offshore wind by 2040, and Utsira Nord represents the country's first large-scale commercial floating wind tender following the 2024 award of the Sørlige Nordsjø II fixed-bottom project. For North East Scotland supply chains, Norway's floating wind expansion creates immediate opportunities in mooring systems, dynamic cables, floating foundation fabrication, and specialist installation vessels—all capabilities developed through ScotWind and other North Sea floating wind projects.

1.2 UK Supply Chain Investment Accelerates

The Crown Estate announced on 12 December that it had awarded £13 million ($16.4 million) to 16 new offshore wind supply chain projects through its Supply Chain Accelerator fund. Among the funded initiatives are projects focusing on low-carbon reef scour protection, automated mooring system solutions, and floating offshore wind infrastructure. Earlier in the week, on 8 December, The Crown Estate confirmed funding support for a floating offshore wind skills academy feasibility study at Port Talbot through the same accelerator program.

These investments directly support the development of the Celtic Sea Round 5 floating wind projects, where three sites totalling up to 4.5 GW have been awarded to world-leading developers including Equinor, Gwynt Glas (EDF Renewables-ESB joint venture), and Ocean Winds (EDPR-ENGIE). The supply chain funding aims to establish regional capabilities in floating foundation manufacturing, mooring systems, and offshore logistics ahead of construction phases expected in the late 2020s and early 2030s.

1.3 Poland's BC-Wind Reaches Financial Close

While technically announced on 1 December, Ocean Winds' BC-Wind project in Poland formally achieved financial close with approximately €2 billion in secured project finance, representing one of Europe's largest offshore wind investments in 2025. The 390 MW bottom-fixed project in the Baltic Sea is backed by the European Investment Bank (contributing nearly one-third of total financing), Spain's Instituto de Crédito Oficial (ICO), and 13 commercial banks.

BC-Wind marks a watershed moment for the Baltic Sea's emergence as Europe's next major offshore wind theater. The project, located approximately 23 kilometres off the coast of Krokowa and Choczewo in Poland's Exclusive Economic Zone, will comprise 26 turbines rated at 14 MW each with Power Boost features increasing output to 15 MW. First power delivery is expected in 2028, with full operations supplying electricity to nearly 500,000 Polish households.

The project demonstrates strong local content commitments, with Polish companies including P&Q (onshore substation and export cable construction), Tele-Fonika Kable (cable design and installation), and Polish ports Świnoujście and Gdańsk serving as marshalling harbours for foundations and turbines respectively. For international supply chains, BC-Wind validates the commercial readiness of the Baltic market and signals that Poland is executing on its ambitions to become a regional offshore wind leader.

1.4 Southeast Asia Emerging as Investment Destination

Multiple reports this week highlighted Southeast Asia's rapid emergence as a priority destination for offshore wind investment, particularly as U.S. policy uncertainty drives capital reallocation. Analysis published on 9 December noted that the Philippines and Vietnam are leading regional momentum, with both countries advancing auction frameworks and regulatory reforms to attract international developers.

The Philippines held its first offshore wind auction in November 2025, awarding rights to develop 3.3 GW of capacity across designated seabeds. Energy Secretary Sharon Garin characterized the auction as shifting offshore wind from "potential to reality" with clear grid connection plans, port strategies, and equipment logistics. Filipino corporation ACEN partnered with Denmark's Copenhagen Infrastructure Partners to co-develop up to 1 GW of capacity in Camarines Sur province.

Vietnam revised its national power plan in April 2025, targeting up to 17 GW of offshore wind by 2035, and is accelerating marine zoning rules and permitting procedures. While Norway's Equinor withdrew from Vietnam in 2024 due to regulatory delays, investor confidence is rebuilding with Copenhagen Infrastructure Partners working with state-owned PetroVietnam and Germany's PNE AG planning a $4.6 billion, 2 GW project in Binh Dinh province. China's state-owned Power China completed Vietnam's Binh Dai offshore wind project in November, while Chinese turbine manufacturer Mingyang Smart Energy is exploring a 2 GW project in the northern Philippines.

Rebecca Williams of the Global Wind Energy Council emphasized that "Asia and Southeast Asia are a beacon of hope for the industry," noting that regional governments are stepping up offshore wind commitments even as the U.S. retreats from federal support.

1.5 End-of-Life Planning Gains Urgency

A significant report published on 7 December by Seas at Risk addressed the emerging challenge of offshore wind farm decommissioning, warning that between 2025 and 2050, thousands of turbines will require dismantling, upgrading, or repurposing. The report, titled "Offshore wind farms end-of-life strategies: Impacts and best approaches," emphasizes that the degraded state of Europe's marine ecosystems and delays in achieving biodiversity targets make end-of-life planning urgent.

The report presents recommendations for managing end-of-life phases and explores policy pathways to align decommissioning with biodiversity protection, decarbonization, and resource efficiency. As Europe's first-generation offshore wind farms approach 20-25 year operational lifespans, the industry faces critical decisions on life extension, repowering, or full decommissioning. For supply chains, this creates growing opportunities in turbine dismantling, foundation removal or repurposing, and marine environmental restoration services.

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2. Hydrogen Infrastructure and Cross-Border Development

2.1 EU Unveils €240 Billion Hydrogen Grid Investment Plan

In the week's most consequential hydrogen policy announcement, the European Commission published its Grids Package on 10 December, committing €240 billion ($281.8 billion) to hydrogen network infrastructure through 2040. The package represents a comprehensive framework for developing dedicated hydrogen pipelines, storage facilities, import terminals, and compression infrastructure across the European Union and neighboring countries.

The Commission simultaneously announced streamlined approval processes for 100 hydrogen and electrolyzer projects across Europe, designated as Projects of Common Interest (PCIs) under the Trans-European Networks for Energy (TEN-E) regulation. These projects will benefit from accelerated permitting, improved regulatory treatment, and potential access to EU funding through the Connecting Europe Facility (CEF).

Hydrogen Europe, the industry association, welcomed the Grids Package as providing "much needed progress on hydrogen backbone" development. The organization noted that the European Network of Network Operators for Hydrogen (ENNOH) is now on equal footing with the European Network of Transmission System Operators for Electricity (ENTSOE) when elaborating infrastructure needs reports. However, Hydrogen Europe pointed out that ENNOH remains absent from Offshore Network Development Plans, despite offshore platforms and pipelines being critical for offshore wind-to-hydrogen integration.

The Grids Package places particular emphasis on two strategic hydrogen corridors:

- SouthH2 Corridor (Tunisia-Italy-Austria-Germany): Designed to transport renewable hydrogen from North Africa into Europe, primarily through converted existing gas pipelines. The corridor aims to scale up renewable hydrogen production, infrastructure, and offtake markets while establishing a supportive regulatory and investment framework.
- Southwest Hydrogen Corridor (Portugal-Spain-France-Germany): Focused on delivering decarbonized hydrogen from Southwest Europe to industrial demand centers. Key PCI projects aim to transport up to 2 million tonnes of renewable hydrogen annually by 2030.

For offshore energy supply chains, the €240 billion investment creates sustained demand for subsea pipeline engineering, hydrogen compression systems, storage facility construction, and monitoring/verification technologies. Companies with experience in offshore oil and gas pipeline construction and subsea infrastructure are particularly well-positioned to transition capabilities to hydrogen transport networks.

2.2 EU Hydrogen Mechanism Launches to Connect Producers and Offtakers

Westwood Energy's Hydrogen Compass report, published 10 December, detailed the launch of the EU's Hydrogen Mechanism in November, a matchmaking platform introduced as part of the European Hydrogen Bank. The mechanism aims to connect producers of renewable and low-carbon hydrogen with credible EU-based offtakers, addressing one of Europe's most persistent barriers to scaling hydrogen: securing long-term offtake agreements.

The report notes that currently only 25% of announced European hydrogen projects have confirmed offtake agreements or memoranda of understanding. The initial call for supply offers under the Hydrogen Mechanism is open until 2 January 2026, with anonymized summaries to follow on 19 January. Running until 2029, the mechanism will give participants access to financial instruments and support for early-stage offtake agreements required for auction participation.

Analysis in the Westwood report reveals that most existing offtake agreements (72%) are for electrolytic hydrogen, with the remaining 28% for CCS-enabled production. Geographically, 47% of projects with offtake agreements involve co-located supply and demand, demonstrating benefits of leveraging existing industrial processes. Another 40% are concentrated in hubs and ports where shared infrastructure supports commercialization.

End-use sectors show that chemicals (35%), steel (19%), and refining (15%) dominate offtake agreements, representing over two-thirds of all commitments. This concentration confirms that early hydrogen adoption is occurring primarily in existing hard-to-abate industrial applications rather than new use cases.

2.3 Low-Carbon Hydrogen Framework Enters Force

The report further noted that the EU's Delegated Act on low-carbon hydrogen became law in November, taking effect on 11 December 2025. The legislation provides long-awaited clarity for CCS-enabled hydrogen and for grid- or nuclear-powered electrolysis falling outside the Renewable Fuels of Non-Biological Origin (RFNBO) definition. The Act extends low-carbon classification to ammonia, methanol, e-fuels, and other syngas-derived products.

This regulatory clarity is pivotal for project developers seeking to qualify for EU support mechanisms and for industrial offtakers needing to demonstrate compliance with decarbonization targets. It also addresses previous criticism that RFNBO rules alone were too restrictive to support market-scale hydrogen deployment.

2.4 Project Cancellations Highlight Land Competition

On a cautionary note, the week brought news of BP's formal withdrawal from the H2Teesside blue hydrogen project in the UK, announced on 1 December. The company cited land competition from a proposed large-scale data center as the reason for abandoning the 1.2 GW CCS-enabled hydrogen facility, which had been in development since 2021 with planned investment of £2 billion.

The cancellation introduces new uncertainty and highlights that hydrogen projects are facing growing competition from other infrastructure developments, particularly as data center expansion accelerates across Europe and the UK. This development underscores the importance of early site securing and integrated spatial planning for hydrogen production facilities.

2.5 Regional Developments and Innovations

Kazakhstan announced the launch of its first fully integrated green hydrogen production station on 10 December, marking a significant milestone for Central Asia's energy transition. The pilot facility, powered entirely by solar and wind energy, uses locally developed catalysts to produce hydrogen

through electrolytic water splitting. The station can currently fill a six-cubic-meter hydrogen cylinder in three hours and represents initial progress under Kazakhstan's Concept for the Development of Hydrogen Energy through 2030.

In Europe, renewable hydrogen leaders called for a "New Deal" at the Renewable Hydrogen Summit on 4 December, with European Commissioner for Energy and Housing Dan Jørgensen reaffirming the Commission's commitment to scaling renewable hydrogen. The Renewable Hydrogen Coalition emphasized the need for enhanced incentives, funding opportunities, and market fundamentals to maintain Europe's first-mover advantage amid growing global competition.

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3. Carbon Capture, Utilization and Storage (CCUS)

3.1 Industrial Carbon Management Forum Convenes in Athens

The 5th Industrial Carbon Management Forum took place on 8-9 December in Athens, Greece, co-hosted by the European Commission and the Hellenic Hydrocarbons and Energy Resources Management Company. The forum, previously known as the CCUS Forum, has brought together stakeholders from industry, national authorities, EU institutions, NGOs, and academia since 2021 to discuss deployment of industrial carbon management projects in Europe.

This year's forum focused on the expected legislative initiative to establish a well-functioning internal market and infrastructure for CO_2, alongside implementation of existing legislation including the Net-Zero Industry Act (NZIA) and the Carbon Removals and Carbon Farming (CRCF) Regulation. Discussions addressed CO_2 transport networks and cross-border transportation, topics of particular interest given the offshore infrastructure requirements for North Sea storage sites.

3.2 Belgium Advances Regional CCUS Cooperation

On 6 December, Flanders and Wallonia signed a joint declaration with 17 Belgian companies to advance the CO_2 value chain, committing to work together on carbon capture, transport, storage, and utilization (CCUS). The declaration was presented and signed in Mons at Holcim's cement factory, where carbon-free cement production is planned by 2029.

The 17 signatory companies represent the majority of industrial CO_2 emissions in Belgium. Both regional governments have approved regulatory frameworks for CO_2 transport, and Belgium's federal and regional governments have concluded bilateral agreements with Denmark, the Netherlands, and Norway enabling cross-border CO_2 transport for permanent storage.

This regional cooperation model demonstrates how industrial clusters can coordinate CCUS infrastructure development, reducing per-project costs through shared transport and storage networks. For offshore contractors, Belgian CCUS developments create opportunities in subsea pipeline construction for CO_2 export to North Sea storage sites.

3.3 US Decommissioning and Financial Assurance Challenges

A detailed analysis published on 11 December highlighted critical challenges in US offshore oil and gas decommissioning, with direct implications for potential CCUS infrastructure repurposing. The report notes that over 2,500 wells and 500 platforms in the Gulf of Mexico are overdue for decommissioning, with an estimated 32,000 offshore wells either abandoned or idle.

Decommissioning costs could reach $30 billion, with delays increasing environmental risks and financial burdens on taxpayers. Former regulators from the Bureau of Ocean Energy Management (BOEM) and Bureau of Safety and Environmental Enforcement (BSEE) identified insufficient financial assurances, bankruptcy proceedings, and capacity constraints as primary obstacles.

The discussion is relevant to CCUS development because some decommissioned platforms and depleted reservoirs could potentially be repurposed for CO_2 injection and storage, but only if decommissioning obligations are met and appropriate regulatory frameworks are established. The US experience highlights the critical importance of robust financial assurance mechanisms to prevent taxpayer liability for facility abandonment.

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4. Marine Energy Breakthrough and Industry Support

4.1 World's First Tidal-Storage-Hydrogen Integration Demonstrated

In a landmark technical achievement, the European Marine Energy Centre (EMEC) announced on 7 December the successful completion of a world-first demonstration integrating tidal power, battery storage, and hydrogen production. The demonstration, conducted at EMEC's onshore site on the Scottish island of Eday, combined three technologies: Orbital Marine Power's O2 2 MW tidal turbine, Invinity Energy Systems' vanadium flow batteries, and an ITM Power 670 kW electrolyzer.

The test validated multiple operational scenarios:

- During periods of high tidal generation, power from the O2 turbine charged the battery system, supplied electricity directly to the electrolyzer, and exported surplus power to the grid
- When tidal generation was low, the battery system discharged power to the electrolyzer to maintain continuous operation
- This integrated approach delivered on-demand electricity to the electrolyzer by smoothing the cyclical nature of tidal power

Andrew Scott, CEO of Orbital Marine Power, emphasized that "tidal energy offers a predictable source of renewable power, and this demonstration shows how we can unlock its full potential through innovative integration". By incorporating battery storage, the system maximizes generation and minimizes curtailment while creating new markets for tidal energy and opportunities for industrial offtakers to decarbonize.

The demonstration was part of the Interreg North-West Europe funded ITEG project, which explored how tidal and hydrogen production could be combined as a solution in coastal areas facing grid constraints. EMEC noted that an integrated project of this nature could help overcome future grid

limitations and pave the way for more resilient renewable energy systems in island and coastal communities.

For supply chains, this breakthrough validates technical pathways for combining marine energy with hydrogen production, potentially creating new market opportunities in regions with strong tidal resources but limited grid capacity, including Scotland, Wales, Canada's Bay of Fundy, and parts of Southeast Asia.

4.2 £30 Million Wave Energy Project Advances in UK

Swedish wave energy developer CorPower Ocean was appointed to lead a €30 million ($35 million) European project on 8 December aimed at improving wave energy commercialization. The initiative supports the UK government's ambitions to develop wave and tidal stream energy as part of the country's clean energy strategy.

CorPower noted research indicating that wave energy, under a high-growth scenario supported by a modernized UK supply chain, could deliver more than £30 billion ($40 billion) in gross value added to the economy and support tens of thousands of jobs. When combined with tidal stream energy, the sector's economic impact could exceed £50 billion ($66.6 billion).

The project launch follows the UK government's recent establishment of the Marine Energy Taskforce, which is developing a roadmap to unlock the UK's wave and tidal potential through strategic planning covering site development, financing, innovation, and supply chain development. The Taskforce is expected to deliver its recommendations in June 2026.

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5. Policy and Regulatory Developments

5.1 EU Energy Infrastructure Permitting Reforms

As part of the 10 December Grids Package announcement, the European Commission proposed comprehensive reforms to accelerate energy infrastructure permitting across the EU. The proposals aim to help lower energy prices, ensure secure and reliable energy supply, and achieve energy independence by bringing a truly European perspective to project planning.

The reforms include three key elements:

- Ensuring Europe maximizes use of existing energy infrastructure before investing in new capacity
- Speeding up permitting procedures so energy infrastructure can be developed faster
- Ensuring fairer cost-sharing for cross-border projects

The Commission emphasized that although progress has been made, several EU countries are not on track to meet the 15% electricity interconnection target by 2030. The package addresses the most

urgent infrastructure needs through eight designated energy highways requiring additional short-term support and commitment.

5.2 EU-Taiwan Trade Dialogue Addresses Offshore Wind

On 11 December, the EU and Taiwan held their fourth Trade and Investment Dialogue, where both parties agreed on the importance of effectively implementing their 2024 understanding on offshore wind investments. The dialogue reflects Taiwan's strategic importance in the global offshore wind supply chain, with the island hosting 3 GW of operational capacity and multiple rounds of competitive auctions driving deployment toward national targets.

The agreement addresses supply chain cooperation, technology transfer, and investment protection for European offshore wind developers and suppliers active in Taiwan's market, including Ørsted, Copenhagen Infrastructure Partners, and multiple European turbine and component manufacturers.

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6. Decommissioning Market Intelligence

6.1 UK Decommissioning Spend Exceeds £2 Billion Annually

Offshore Energies UK (OEUK) released its Decommissioning Report 2025 on 10 December, revealing that annual decommissioning expenditure on the UK Continental Shelf passed £2 billion for the first time in 2024. The report forecasts that spending will continue to rise throughout the decade, reaching an average of almost £3 billion per year.

Wells remain the largest area of decommissioning activity, while subsea removals, heavy-lift operations, and onshore dismantling are set to grow rapidly. The report underscores the accelerating pace of decommissioning across the UKCS as the basin responds to earlier cessation of production decisions, rising costs, and wider political and economic pressures.

This sustained expenditure creates substantial opportunities for North East Scotland companies specializing in well plug and abandonment (P&A), platform removal, subsea infrastructure cutting and recovery, and onshore recycling and materials handling. The report also highlights growing interest in infrastructure repurposing for CCUS and offshore wind operations and maintenance bases.

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7. Regional Market Focus

7.1 Ireland Advances South Coast Offshore Wind Grid

EirGrid, Ireland's electricity grid operator, provided updates on 9 December regarding the Powering Up Offshore South Coast project, which will build transmission grid infrastructure to connect approximately 900 MW of offshore wind from Ireland's south coast into the national grid. The project includes two offshore substation platforms to be located within Maritime Area A (Tonn Nua) of the South Coast Designated Maritime Area Plan (SC-DMAP).

On 9 December, EirGrid welcomed the announcement that Helvick Head Offshore Wind DAC, a joint venture between ESB and Denmark-based Ørsted, was selected as the offshore wind developer in the ORESS Tonn Nua Auction. EirGrid will commence engagement with the successful developer to coordinate delivery of grid transmission infrastructure.

Supporting infrastructure will include offshore transmission cables, new onshore substations in County Cork and County Waterford/Wexford, connections between landfalls and substations via underground cables, and loop-in connections to the existing transmission network. The 900 MW capacity is sufficient to power almost one million homes with clean energy.

The first phase of marine and coastal surveys, which commenced in July 2025, has been completed, including comprehensive marine geophysical, metocean, and environmental surveys. Two deployed MetOcean buoys will remain on site until late 2026, collecting data on waves, water quality, wind, and sunlight to support offshore planning and environmental monitoring.

Conclusion and Week Ahead

The week of 6-12 December 2025 demonstrated that the global offshore low-carbon energy sector is advancing on multiple fronts despite economic headwinds and geopolitical uncertainty. Europe continues to lead in policy frameworks and cross-border infrastructure planning, with the €240 billion hydrogen grids commitment and Norway's floating wind approvals representing major confidence signals. The successful EMEC tidal-storage-hydrogen demonstration proves that technical solutions exist for integrating variable renewables with industrial decarbonization pathways, particularly in grid-constrained environments.

For North East Scotland supply chains, the week's developments reinforce that integrated offshore capabilities—spanning wind installation, hydrogen infrastructure, CCUS pipeline construction, and decommissioning—are increasingly valuable as projects combine multiple technologies and repurpose existing infrastructure. The Baltic Sea's emergence with Poland's BC-Wind financial close, Southeast Asia's regulatory momentum, and Norway's floating wind subsidy framework all create export opportunities for companies with North Sea experience.

Looking ahead, key indicators to monitor include the outcome of the EU Hydrogen Mechanism's first call for supply offers (closing 2 January), the Marine Energy Taskforce's progress toward its June 2026 roadmap delivery, and Norway's floating wind developers' progress on impact assessments and license applications. The convergence of offshore wind expansion, hydrogen corridor development, and aging infrastructure decommissioning continues to define the integrated market opportunity for the remainder of the decade.

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