

Europe Offshore

Low Carbon Intelligence Briefing

Week Ending 24 October 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

EXECUTIVE SUMMARY

The week to 24 October 2026 was shaped by the European Commission's Innovation Fund round and by growing stress in German offshore wind. On 19 October the Commission selected 77 net-zero projects for EUR 3.4 billion. In the offshore sector they include Aker BP and Hoegh Evi's Atlas CO2 storage network on the Norwegian shelf (EUR 223 million), Eni and Snam's Ravenna CCS Phase 2 in Italy, Terna Energy and Saitec's 45 MW AEGEANFLOAT floating pilot in Greece, Minesto's 10 MW Euro Dragon Farm tidal array in Ireland (EUR 20.2 million), and Aker Solutions' RESOLVE automated line for 2 GW HVDC substation topsides in Norway. In Germany, TotalEnergies agreed on 23 October to buy 50 per cent of RWE's 4 GW N-9.1 and N-9.2 sites. The same day, eight state premiers attacked the federal WindSeeG reform and regional broadcasters reported thousands of supply-chain jobs at risk after auctions drew no bids.

Hydrogen policy moved more than projects. On 19 October Germany's economy ministry set out a package that includes at least EUR 1.5 billion of carbon contracts for difference for industrial hydrogen users, reserved in the 2027 tender round, and EUR 4.2 billion of federal and state money for hydrogen network expansion. Network operators marking two years of the hydrogen core network said a further 900 km of pipeline is due by the end of 2027 and the first commercial hydrogen cavern store will open at Epe in 2027. In Austria, OMV received the first Siemens Energy electrolyser components for its 140 MW plant at Bruck an der Leitha, due for completion at the end of 2027. In Slovakia, CEF Energy granted EUR 62.63 million to modernise two of the six units at the 735 MW Cierny Vah pumped storage plant, with works running to Q3 2031.

Geothermal had a second warning in a fortnight: on 22 October enercity confirmed that its planned 30 MW Eavor-Loop heat project in Hannover-Lahe will not go ahead, a week after Eavor pulled its rigs out of Geretsried. Berlin, by contrast, awarded BEW the city's first deep geothermal exploration licence, for a well of about 1,950 m at Marzahn. On the Norwegian shelf, the Wisting partners led by Equinor gave Aibel the FEED contract for the FPSO topsides, about 250 jobs in Asker and Haugesund, with an investment decision planned for late 2027. In the Baltic and Irish markets, Ignitis proposed that Lithuania's ministries postpone its 700 MW offshore wind project and Energia dropped its two Irish offshore wind farms. There were no new non-UK decommissioning awards this week.

Headline Signals — Week Ending 24 October 2026

- On 19 October the European Commission selected 77 Innovation Fund projects for EUR 3.4 billion, among them Atlas CO2 storage (Norway), Ravenna CCS Phase 2 (Italy), AEGEANFLOAT (Greece), Euro Dragon Farm (Ireland) and Aker Solutions' RESOLVE HVDC topside line (Norway).

- Aker BP and Hoegh Evi's Atlas CO2 network won EUR 223 million. It is designed for 6 Mt a year at the EXL011 saline aquifer (Aker BP 80%, ORLEN Upstream Norway 20%), with FID targeted for 2028 and first injection in 2031.
- TotalEnergies agreed on 23 October to buy 50% of RWE's 2 GW N-9.1 and 2 GW N-9.2 sites in the German North Sea, which are due for commissioning in 2031 and 2032.
- Eight German state premiers rejected the two-stage auction model in the WindSeeG reform and called for unviable awarded sites to be handed back and re-tendered. NDR reported thousands of offshore supply-chain jobs at risk.
- Germany's hydrogen package, published 19 October, includes at least EUR 1.5 billion of carbon contracts for difference reserved in the 2027 round, EUR 4.2 billion for network expansion and 4 GW of hydrogen-ready gas plants.
- OMV took delivery of the first Siemens Energy electrolyser components for its 140 MW, 23,000 t a year plant at Bruck an der Leitha in Austria. Strabag is building it and completion is due at the end of 2027.
- Minesto's 10 MW Euro Dragon Farm tidal array in Ireland was selected for a EUR 20.2 million grant covering 60% of the investment. The grant agreement is due in Q1 2027 and a SEK 130 million rights issue is planned for December.
- CEF Energy awarded EUR 62.63 million to convert two of the six units at Slovakia's 735 MW Cierny Vah pumped storage plant to variable speed. Slovenske elektrarne leads the project and works run to Q3 2031.
- enercity cancelled the 30 MW, two-loop Eavor geothermal project at Hannover-Lahe. Berlin awarded BEW its first deep geothermal exploration licence, for a well of about 1,950 m at Marzahn, with first operation planned for 2031.
- Equinor's Wisting partnership awarded Aibel the FEED contract for the FPSO topsides, with an exclusive option for engineering, procurement and project management. Concept select is due at the end of 2026 and FID in late 2027.

Offshore Wind — Fixed Bottom

TotalEnergies buys into RWE's 4 GW German North Sea pair

TotalEnergies agreed on 23 October to acquire a 50 per cent stake from RWE in the N-9.1 and N-9.2 offshore wind sites, each 2 GW, about 110 kilometres off the German coast. Each site holds a 25-year licence, extendable to 35 years, and commissioning is planned for 2031 and 2032. BSH carried out the preliminary environmental, seabed, wind and oceanographic studies for both sites. TotalEnergies says the deal complements its own German concessions N-12.1, N-11.2 and O-2.2, which together form a 6.5 GW German offshore portfolio, and builds on its existing partnership with RWE at OranjeWind in the Netherlands. In a related milestone, Jan De Nul installed the first of 53 transition-piece-free monopiles at the 795 MW OranjeWind site off IJmuiden on 16 October, using its vessel Les Alizes. All 53 are due by early 2027 and full operation is due in early 2028.

NES SALES OPPORTUNITY

A 50:50 RWE and TotalEnergies team will run 4 GW of German procurement

N-9.1 and N-9.2 now have two well-funded owners sharing the risk, which makes them more likely to proceed than many German sites awarded in 2023 to 2025. Pre-FID packages will be site investigation, geotechnical and UXO survey, metocean, cable route engineering and foundation design, followed by offshore construction from about 2029. North East Scotland survey, geotechnical and integrity firms should approach the joint RWE and TotalEnergies German offshore team in the next quarter, using the OranjeWind partnership as a reference.

Aker Solutions wins EU backing for an automated HVDC topside line

The Innovation Fund round selected RESOLVE, led by Aker Solutions, to set up an automated prefabrication line in Norway for steel structures used in offshore substations. The line will make HVDC topsides for 2 GW transmission systems using automated laser-hybrid arc welding, with the aim of cutting delivery times by about ten months and reducing reliance on suppliers outside Europe. Two other offshore wind manufacturing projects were also selected: Stillstrom's OffshoreCharge in Denmark, a 7.5 MVA charger for electric service operation vessels at offshore wind farms, and Neo Performance Materials' GAUSS line in Narva, Estonia, which will make up to 3,000 tonnes a year of rare earth magnets, a third of them for EU offshore wind. Grant values for the individual projects have not been published.

NES SALES OPPORTUNITY

RESOLVE strengthens the Norwegian HVDC yard base, and with it subcontract demand

A faster Norwegian HVDC topside line means more 2 GW platforms built in Europe for TenneT, 50Hertz and other transmission operators, and more outfitting, E and I, HVAC, fire and gas, and commissioning subcontracts placed by Aker Solutions. North East Scotland electrical and instrumentation, mechanical completion and commissioning contractors should approach Aker Solutions' renewables and field development procurement team in Stord and Verdal now, while the line's supplier base is still being set up.

Other fixed-bottom items: from 20 October, Vattenfall began offering 200 MW of balancing capacity from its Veja Mate wind farm in the German balancing market, its first entry into that market. PGE Baltica moved its head office from Warsaw to Gdansk, where it already employs more than 50 people. Offshore Wind Poland 2026 takes place in Warsaw on 17 and 18 November. No new turbine orders or offshore wind FIDs were confirmed in non-UK Europe this week.

Floating Wind

Terna Energy and Saitec Offshore Technologies' AEGEANFLOAT was selected for Innovation Fund support. The 45 MW pilot in the Aegean will use three 15 MW turbines on Saitec's concrete SATH twin-hull floating platforms. The award covers site characterisation, platform design, installation, grid connection and operation, and the project also has EIB Project Development Assistance. No schedule has been given. On 20 October Saitec and Kansai welcomed Kumagai Gumi as a new partner in the 2 MW DemoSATH prototype off the Basque coast, which is extending operation through 2027 with a focus on research and new construction methods. In Italy, a Vinson and Elkins review (23 October) noted that the 3.8 GW FER 2 offshore quota, with a floating ceiling tariff of EUR 185 per MWh, has still not been auctioned and must

be by the end of 2028. CRE's evaluation of the French AO10 bids continues, with awards expected in early 2027.

NES SALES OPPORTUNITY

AEGEANFLOAT is the first funded floating project in the Eastern Mediterranean

A 45 MW, three-unit pilot on concrete hulls will need mooring and anchor design, dynamic cable engineering, tow-out and hook-up, and marine warranty services that Greek suppliers have not yet delivered for floating wind. North East Scotland mooring, subsea cable and marine-operations firms should approach Terna Energy's offshore team and Saitec in Bilbao during grant preparation, before the engineering packages are let, using DemoSATH and Kincardine-type experience as references.

Hydrogen

Germany's economy ministry published its hydrogen acceleration package on 19 October, acknowledging that the market is behind expectations and that production costs remain well above fossil alternatives. The package reserves at least EUR 1.5 billion in the 2027 carbon contracts for difference round for industrial companies switching to hydrogen, with 15-year cover for the extra cost. Federal and state governments will provide EUR 4.2 billion for hydrogen network expansion. Of 4 GW of hydrogen-ready gas plants, 2 GW will be tendered in 2027 for hydrogen use from 2040, and a further 2 GW between 2030 and 2032. On 22 October FNB Gas, marking two years since the core network was approved, said a further 900 km of pipeline is due by the end of 2027 and the first commercial hydrogen cavern store will open at Epe in 2027. In Austria, OMV received the first electrolyser components for its 140 MW plant at Bruck an der Leitha, which will produce up to 23,000 t a year (22 October). Strabag is building it and Siemens Energy supplies the electrolysers. The plant is financed by EUR 450 million from the EIB and EUR 123 million from aws, and completion is due at the end of 2027, although Masdar withdrew as a partner in September.

The Commission's Innovation Fund project list also shows hydrogen auction projects invited to grant preparation in Denmark (NJK, ALBA), Norway (RogalandH2, Gen2-LH2), Germany (H2Rheinfelden1, Lotse), Finland (Cloudberry), Spain, Portugal, Greece and Austria. In the general call it lists electrolyser manufacturing lines in Italy (SPRINTER) and Belgium (HyBoost) and an ammonia-cracking project in the Netherlands (Phantom). Individual grant amounts were not published.

NES SALES OPPORTUNITY

Germany puts dated money behind hydrogen offtake and pipelines

The 2027 carbon contracts for difference round and the 900 km of pipeline due by the end of 2027 are the two dated triggers. Pipeline operators adding route length will need in-line inspection, hydrogen compatibility assessment, pressure testing and integrity management. OMV's Bruck an der Leitha plant needs installation and commissioning support through 2027. North East Scotland pipeline integrity and commissioning firms should target FNB Gas members (OGE, GASCADE, Nowega, Thyssengas) and OMV's project team, and track Norway's RogalandH2 and Gen2-LH2 as nearer-home maritime hydrogen prospects.

CCUS

Aker BP and Hoegh Evi's Atlas project received a EUR 223 million Innovation Fund award (reported 20 October). Atlas is a cross-border CO₂ network that will collect CO₂ at regional export hubs near industrial clusters and carry it in large low-pressure carriers. It will be injected through subsea infrastructure into a saline aquifer more than 2,000 m below the seabed at EXL011 on the Norwegian shelf, where Aker BP is operator with 80 per cent and ORLEN Upstream Norway holds 20 per cent. Design capacity is 6 Mt a year, expandable beyond 10 Mt. The project is in its select phase, with FID targeted for 2028 and first injection in 2031. In Italy, Eni and Snam announced on 20 October that Ravenna CCS Phase 2 was selected in the large-scale category. It targets 4 Mt a year by 2030 and up to 16 Mt later, from a total storage capacity of about 500 Mt in Adriatic reservoirs. Phase 2 adds a compression station, a CO₂ reception terminal that can take deliveries by pipeline, ship, rail and road, and Snam's Ravenna to Casalborgorsetti and Ferrara to Casalborgorsetti pipelines. Other selected CCS projects include Mosusol-netCO₂ (cement, Spain), ReStore (waste-to-energy, Sweden), Furu (direct air capture, Norway) and KI-ZERO (cement, Austria).

NES SALES OPPORTUNITY

Atlas and Ravenna are the next CO₂ storage developments after Northern Lights

Atlas is in its select phase with FID in 2028, which is the window to influence its subsea architecture, injection well design and monitoring plan. Ravenna Phase 2 is aiming for 4 Mt a year by 2030 and will need offshore compression, platform conversion and well work in the Adriatic. North East Scotland CO₂ well-integrity, subsea, and measurement, monitoring and verification specialists should approach Aker BP's CCS team and Hoegh Evi's carrier team in Norway now. Approach the Eni and Snam Ravenna joint venture through Italian partners.

Marine Energy

Minesto announced on 19 October that its Euro Dragon Farm, a tidal kite array of up to 10 MW in Irish coastal waters designed for low-velocity currents, was selected for a EUR 20.2 million Innovation Fund grant covering 60 per cent of the investment. Minesto describes it as the first Dragon Farm in the EU. Grant agreement preparation with CINEA has started and is due to finish in Q1 2027. On 21 October Minesto announced a rights issue of about SEK 130 million to fund Euro Dragon Farm and its 10 MW first phase at Hestfjord in the Faroe Islands, where it sees potential for up to 200 MW. An EGM is set for 23 November and subscription for 7 to 21 December. Elsewhere, CorPower Ocean received the Prince Albert II of Monaco Foundation's 2026 Planetary Health Award for Innovation (19 October). Latvia's H₂-TIDAL hydrogen project was also selected in the small-scale call.

NES SALES OPPORTUNITY

Euro Dragon Farm and Hestfjord create the first commercial tidal kite supply chain

Two arrays of about 10 MW each, in Ireland and the Faroes, both heading for investment decisions in 2027, will need mooring and foundation supply, subsea cable and export, marine operations and quick-turnaround O and M. North East Scotland firms with Orkney tidal experience should approach

Minesto's project team in Gothenburg during grant preparation in Q1 2027. Note that the December rights issue is needed to fund the next stage, so check payment terms.

Hydropower

CEF Energy announced on 20 October EUR 62.63 million for the SE Integrator project, part of PCI 2.11, to modernise the Cierny Vah pumped storage plant, Slovakia's largest at 735 MW. Slovenske elektrarne leads the project. Phase I converts two of the six units from fixed to variable speed, with new frequency converters, upgraded power and control systems and associated civil works. Works began at the end of July 2026 and are due to finish in Q3 2031. A further EUR 2.11 million funds studies, including market simulation and battery storage options. In the Czech Republic, the ComPon Prague heat storage project was selected in the Innovation Fund's small-scale call. Bids for Bulgaria's EUR 350 million Yadenitsa dam tender at Chaira remain due on 4 November.

NES SALES OPPORTUNITY

Cierny Vah is a five-year variable-speed retrofit with M and E subcontracts

Variable-speed conversion involves frequency converters, generator-motor modifications, control system integration and high-voltage testing over five years. These are electrical and rotating-equipment scopes where oil and gas experience transfers well. North East Scotland HV testing, condition monitoring and control-systems integrators should approach Slovenske elektrarne's project team and its equipment OEM in the next 60 to 90 days. Yadenitsa's 4 November deadline remains the nearest dated hydropower bid.

Geothermal

enercity confirmed on 22 October that the deep geothermal project it planned with Eavor at Hannover-Lahe will not be built. The project was two Eavor-Loops, a closed-loop system intended to deliver about 30 MW of heat into the district network. enercity says Eavor decided early in 2026 to focus on being a technology company rather than an investor and developer, and months of talks found no viable alternative. Hannover's coal exit after winter 2027/28 remains on track using other plants. The cancellation follows Eavor's withdrawal of its rigs from Geretsried on 15 October. In Berlin, the Senate awarded BEW Berliner Energie und Waerme the first licence for deep geothermal exploration on 19 October: a well of about 1,950 m at the Marzahn power station site, investigating four aquifers, with first operation planned for 2031. Berlin has seven exploration sub-areas but not enough funding for the twelve wells first planned, and a city-wide 3D seismic survey follows in 2027. Other items: geothermal drilling on La Palma was exempted from environmental assessment, and the canton of Thurgau in Switzerland will continue its research with a 3D seismic survey (both 22 to 23 October).

NES SALES OPPORTUNITY

Closed-loop is stalling; conventional aquifer programmes like Berlin are where the drilling work is

Two Eavor projects stopped in a fortnight is a clear signal: do not commit unpaid resources to first-of-a-kind closed-loop geothermal without strong counterparty finances. The bankable demand is in conventional municipal aquifer programmes. BEW's Marzahn well will need drilling services, well design and casing, completion, testing and seismic interpretation, followed by Berlin's 2027 seismic campaign. North East Scotland well-engineering and subsurface firms should approach BEW's geothermal team and the Senate's energy department now, ideally with a German drilling partner.

Decommissioning and Norwegian Continental Shelf

Equinor and the Wisting licence partners awarded Aibel a significant FEED study contract on 22 October for the topside modules of the Wisting production vessel in the Barents Sea. The contract includes an exclusive option for engineering, procurement and project management, while the topside fabrication contract will be awarded later. The work, about 250 people at Aibel's Asker office supported from Haugesund, starts immediately and runs to late 2027. Concept select is planned for the end of 2026 and FID for late 2027. Weatherford reported a two-year contract extension and a new offshore completions award from Equinor across several fields in its Q3 results. There were no new non-UK decommissioning contracts this week. DOF's Q1 2027 subsea decommissioning campaign, reported last week, was widely re-reported, and the Perenco Leman South and Durango decommissioning completed this week is in UK waters, so out of scope.

NES SALES OPPORTUNITY

Wisting FEED sets the vendor list for Norway's next big FPSO

FEED is when equipment packages, vendor lists and design houses are chosen. Aibel will be specifying process, power, utilities, safety and instrumentation systems for the Wisting FPSO topsides until late 2027. North East Scotland equipment suppliers, inspection and integrity firms and specialist engineering houses should get onto Aibel's Wisting vendor and subcontractor lists in Asker this quarter, ahead of concept select at the end of 2026.

Industry and Policy

German offshore wind policy came under strain. On 23 October the heads of government of Lower Saxony, Schleswig-Holstein, Bavaria, Baden-Wuerttemberg, Hamburg, Bremen, Mecklenburg-Western Pomerania and Saarland wrote to Economy Minister Katherina Reiche rejecting the two-stage auction model in the draft WindSeeG reform. Under that model sites would first be offered without state price support, with contracts for difference only as a fallback. The premiers want that step removed and a mechanism for returning unviable awarded sites and re-tendering them quickly, in line with the Bundesrat's position. The industry associations BWO, BDEW, IG Metall Kueste and ZDS are calling for a single-stage CfD auction, securities capped at EUR 100 million per GW, and the return of 2023 to 2025 awards that are at risk. An expert hearing is set for November. NDR reported on 23 October that thousands of jobs at Steelwind Nordenham, Siemens Gamesa in Cuxhaven and the wider supply chain are at risk, and that projects already started by BP and TotalEnergies may not proceed. Elsewhere, Lithuania's Ignitis Group proposed on 21 October that the energy and finance ministries postpone its 700 MW, roughly EUR 3 billion Baltic offshore

wind project by changing its schedule. It is continuing permit work, with a construction permit expected in 2027 and a decision due by the end of the year. In Ireland, Energia, owned by Ardian, dropped its plans for two offshore wind farms to focus on onshore renewables (22 October).

NES SALES OPPORTUNITY

Pick counterparties carefully as weak German, Lithuanian and Irish projects drop out

German sites from 2023 to 2025 may be handed back, Lithuania's first offshore project may slip, and Energia has left Irish offshore wind. Pre-FID survey and engineering work on these projects carries real cancellation risk. North East Scotland firms should focus business development on projects with strong owners and dated milestones, such as RWE and TotalEnergies' N-9 pair, OranjeWind, Zeevonk and EirGrid's south coast programme. They should watch the November WindSeeG hearing for the final auction design and push for return-and-retender rules that bring stalled German sites back to market.

Priority Action Table

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	Wisting FPSO topsides FEED — vendor lists, equipment packages, inspection and integrity, specialist engineering	NCS	Aibel (Asker), Equinor, Wisting partners	FEED to late 2027	HIGH
2	Aker Solutions RESOLVE HVDC topside line — E and I, outfitting, HVAC, fire and gas, commissioning subcontracts	Grid / Wind	Aker Solutions renewables procurement	Live now	HIGH
3	Atlas CO2 network, EUR 223m IF award, 6 Mt/yr — subsea architecture, injection wells, MMV in select phase	CCUS	Aker BP, Hoegh Evi, ORLEN Upstream Norway	FID 2028	HIGH
4	Bulgaria Yadenitsa dam, EUR 350m (carry-over) — tunnel instrumentation, gates and valves, heavy lift	Hydro	NEK, bidding heavy-civil consortia	Bids 4 Nov	HIGH
5	N-9.1 and N-9.2, 4 GW, RWE and TotalEnergies 50:50 — site investigation, geotechnical, UXO, cable route engineering	Fixed Wind	RWE, TotalEnergies German offshore teams	COD 2031-32	MEDIUM
6	Berlin BEW Marzahn 1,950 m geothermal well and 2027 city seismic — drilling, casing, completion, testing	Geothermal	BEW Berliner Energie und Waerme, Berlin Senate	Ops 2031	MEDIUM
7	German hydrogen core network, 900 km by end 2027 — in-line inspection, H2 compatibility, pressure testing	Hydrogen	OGE, GASCADE, Nowega, Thyssengas, OMV	To end 2027	MEDIUM
8	Cierny Vah 735 MW variable-speed retrofit, EUR 62.63m CEF — HV testing, converters, control integration	Hydro	Slovenske elektrarne, equipment OEM	Works to 2031	MEDIUM
9	AEGEANFLOAT 45 MW floating pilot — moorings, dynamic cables, tow-out and hook-up, marine warranty	Floating	Terna Energy, Saitec Offshore Technologies	Grant prep	LOW-MED
10	Minesto Euro Dragon Farm 10 MW (Ireland) and Hestfjord (Faroes) — moorings, cable, marine ops, O and M	Marine	Minesto, CINEA grant process	GAP Q1 2027	LOW-MED

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