ENERGY TRANSITION WEEKLY - GLOBAL EDITION

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A weekly intelligence briefing for North East Scotland energy supply chain companies covering offshore wind, hydrogen, CCUS, decommissioning and other renewables developments impacting the global energy transition and the supply chains that support it.

Executive Summary

This week's defining story is the full resumption of all five US offshore wind projects halted by the Trump administration in December, with the final court injunction for Ørsted's 924 MW Sunrise Wind off New York granted on 2 February.

Across the Atlantic, Spain opened public consultation on its first-ever offshore wind auction, exclusively targeting floating technology in a market with over 20 GW of projects awaiting approval.

In the North Sea, RWE and Amazon signed a PPA for the Nordseecluster B offshore wind farm in Germany, underscoring accelerating corporate demand for offshore wind. Meanwhile, the Netherlands' new coalition government committed to 40 GW of offshore wind by 2040, with new CfD-backed contracts and a crisis law to tackle grid congestion.

The aftershocks of the Hamburg Declaration (signed 26 January) continued to reverberate, with the UK Government formally publishing the summit agreements on 3 February, including the Clean Energy Security Pact and Joint Declarations on interconnected offshore grids and hydrogen.

Key number this week: 5 - the number of US offshore wind farms now cleared to resume construction after winning judicial relief against the Trump administration's halt order, representing over 5 GW of combined capacity.

Action for this week: Track Spain's floating wind auction consultation (open until 24 February) while simultaneously monitoring how the Netherlands' new CfD framework and crisis grid law take shape - this will be Europe's next major procurement signal. Study the UK Government's Hamburg Declaration document for potential opportunities.

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1. Global Offshore Wind Pulse

1.1 United States: All Five Halted Projects Resume Construction

On 2 February, a US federal judge granted Ørsted a preliminary injunction allowing the 924 MW Sunrise Wind project off New York to immediately restart construction. Ørsted argued it had invested over $7 billion in the project and was losing approximately $2.5 million per day during the pause. This was the fifth and final project stopped by the Trump administration on 22 December 2025 to secure a court order permitting work to continue.

The other four projects — Revolution Wind (Rhode Island), Vineyard Wind (Massachusetts), Empire Wind (New York) and Coastal Virginia Offshore Wind — all previously obtained similar injunctions in January. Combined, these five projects represent over 5 GW of capacity either under construction or in late-stage development. While the judicial relief provides critical near-term continuity, the underlying political and regulatory risk in the US market remains elevated.

For North East Scotland supply chain firms, the US remains a high-reward but volatile market — active construction does, however, sustain demand for installation vessels, subsea cables, and specialist marine services.

1.2 Spain: First Floating Offshore Wind Auction Consultation Opens

Spain's Ministry for the Ecological Transition (MITECO) launched a public consultation on the design of the country's first offshore wind auction, with submissions open until 24 February. The process will be exclusively focused on floating offshore wind, reflecting Spain's predominantly deep-water conditions along both Atlantic and Mediterranean coasts. The proposed auction will use a two-sided Contract for Difference and include non-economic criteria covering environmental impact, job creation and local industrial development.

Over 40 pre-projects representing more than 20 GW are currently in administrative processing across Spain. The consultation seeks industry input on auction format, pricing mechanisms, qualification criteria and supply chain requirements.

For North East Scotland companies with floating wind experience from ScotWind, INTOG and Celtic Sea developments, Spain represents a significant and time-sensitive new export market for substructure design and fabrication, mooring systems, dynamic cables, and installation services.

1.3 Netherlands: New Government Commits to 40 GW by 2040

The new Dutch coalition government, led by the D66 party's Rob Jetten, formally committed this week to developing 40 GW of offshore wind by 2040 — targeting the upper limit of the 30–40 GW range set by the previous administration. The government will introduce Contracts for Difference for offshore wind projects and bear part of the financial risk through new contracts designed to attract investors.

Critically, the Dutch cabinet also announced a forthcoming "crisis law" to fast-track permits for urgent grid connection projects, enable government intervention on stalled developments, and introduce flexible contracts with grid tariff incentives. Offshore wind subsidies will be extended through 2032. The Netherlands Enterprise Agency confirmed that the next tender — for the 1 GW IJmuiden Ver Gamma-A site — is expected to open in September 2026 with a subsidy of €3.978 billion available.

The Dutch market offers substantial near-term opportunities for foundation, cable, installation and O&M providers with North Sea experience.

1.4 Germany: RWE and Amazon Sign Nordseecluster PPA

On 3 February, RWE and Amazon signed a 110 MW Power Purchase Agreement for RWE's Nordseecluster B offshore wind farm in the German North Sea. Nordseecluster A (660 MW) is already under construction with commissioning expected in early 2027. This is Amazon's fourth large-scale offshore wind PPA in Germany, bringing its total German renewable energy portfolio to over 790 MW across ten projects. The deal confirms growing corporate offtake appetite for offshore wind beyond utilities and highlights the expanding role of hyperscalers as anchor customers for new offshore wind capacity.

1.5 European Offshore Wind and Steel: Strategic Link

WindEurope analysis published on 4 February drew attention to the strategic link between offshore wind and the European steel industry, arguing that North and Baltic Sea wind power is essential for Europe's green steel transition. The report positions offshore wind PPAs as a critical enabler for steel decarbonisation, broadening the offtake landscape beyond utilities and data centres into heavy industry — a development that could create additional long-term revenue streams and demand certainty for the entire offshore wind supply chain.

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2. Hydrogen Infrastructure

2.1 UK Government Publishes Hamburg Summit Hydrogen Commitments

On 3 February, the UK Government formally published the full text of the Hamburg Declaration and accompanying Joint Declarations agreed at the 3rd North Sea Summit on 26 January. The published agreements include commitments to deepen cooperation on research and development into offshore hydrogen production and explore the potential deployment of offshore hydrogen systems across the North Seas. A Joint Declaration of Intent on cooperation for an interconnected offshore renewable energy grid was signed between the UK, Germany, Denmark, Belgium and the Netherlands.

The British Chambers of Commerce welcomed the direction set in green hydrogen development and trade, noting the UK stands ready to benefit from cross-border hydrogen infrastructure.

For North East Scotland companies, these formalised agreements provide a structured pathway to export hydrogen pipeline, compression, electrolyser and integration capabilities into the emerging European hydrogen backbone.

2.2 7th UK CCUS & Hydrogen Decarbonisation Summit 10/11 February

The 7th UK CCUS & Hydrogen Decarbonisation Summit takes place in Leeds on 10–11 February, focusing on the implementation of CCS and CCUS within industrial operations and the role of hydrogen in decarbonising heavy industry. This is a key networking and intelligence-gathering opportunity as the sector awaits finalisation of Track-1 and Track-2 CfD commercial terms.

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3. CCUS: Awaiting Commercial Terms

This week saw no new CCUS project FIDs, but the sector continues to operate under a clear trajectory: the UK's Track-1 clusters (HyNet and East Coast Cluster) and Track-2 projects (Viking and Acorn) are positioned for financial close, but CfD commercial terms under the £20 billion funding allocation remain unresolved.

Industry analysis this week reinforced that CCUS becomes economically viable when developed as shared infrastructure — common CO_2 transport and storage networks used by multiple emitters and hydrogen producers.

The first operational CCUS clusters are expected to begin generating real operating data on uptime, utilisation and long-term storage performance in 2026, which will be critical in determining whether shared CCUS infrastructure can deliver the reliability needed for large-scale deployment.

For supply chain companies, the immediate watchpoint is the resolution of Track-1 CfD terms — expected in H1 2026 — which will unlock the first wave of capture, pipeline, compression and monitoring contracts.

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4. Decommissioning and Infrastructure Repurposing

No major new decommissioning contract awards or regulatory announcements were made this week. However, the formalisation of the Hamburg Declaration agreements (published 3 February) reinforces the decommissioning-to-repurposing pathway: the explicit commitment to offshore hydrogen production and cross-border grid infrastructure strengthens the commercial case for converting late-life North Sea platforms, wells and pipelines into hydrogen and CO_2 storage infrastructure rather than full removal.

The NSTA's enforcement stance — with 13 operators named for falling behind on 153 wells in arrears — continues to underpin near-term demand for P&A, subsea removal and heavy-lift services across the UKCS.

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5. Policy, Regulation and Market Signals: Summary

Development	Detail	Supply Chain Implication
US: All 5 halted projects resume	Final injunction granted for Sunrise Wind (924 MW)	Construction continuity for 5+ GW; political risk persists
Spain: Floating wind auction consultation	First-ever auction; two-sided CfD; closes 24 Feb	New export market for floating wind capabilities
Netherlands: 40 GW commitment	New government backs CfDs, crisis grid law	IJmuiden Ver Gamma-A (1 GW) tender Sept 2026
RWE–Amazon PPA	110 MW offtake for Nordseecluster B	Corporate offtake expanding beyond utilities
UK CCUS CfD terms	Track-1/2 FIDs awaiting commercial agreement	Resolution expected H1 2026; unlocks contract pipeline
UK publishes Hamburg agreements	Clean Energy Pact, hydrogen, interconnected grid	Formalises cross-border project pipeline

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6. Weekly Feature — "Spain's Floating Wind Auction: Why North East Scotland Should Pay Attention"

Spain's decision to open consultation on its first offshore wind auction — exclusively targeting floating technology — marks the emergence of a major new European market that aligns directly with North East Scotland's deepening floating wind capabilities.

The scale is significant. Over 40 pre-projects representing more than 20 GW are already in Spain's administrative pipeline. The country's deep-water continental shelf means virtually all commercial offshore wind development will require floating foundations — semi-submersibles, spar buoys or tension-leg platforms — rather than the fixed-bottom monopiles that dominate shallower North Sea and Baltic waters. This creates a premium market for exactly the capabilities that ScotWind and INTOG are building in Scotland: floating substructure design, fabrication and assembly; dynamic cable engineering; advanced mooring systems; and specialist installation and marine logistics for deep-water deployment.

The auction design matters. MITECO has proposed a two-sided CfD that includes non-economic criteria — environmental impact, industrial development and job creation. This means the auction will not be won on price alone. Companies and consortia that can demonstrate strong environmental credentials, local content commitments and proven delivery capability will have an advantage. For Scottish firms, this is an opportunity to leverage their track record in high-quality HSE standards, environmental management and community benefit schemes developed through North Sea operations.

The timing is favourable. With submissions closing on 24 February, the auction design phase is happening now. The North East energy supply chain should be actively engaging with MITECO's consultation process, understanding requirements, qualification criteria and partnership opportunities. Early engagement at the design stage — before the auction launches — is the highest-leverage point for influencing terms that recognise international floating wind experience.

The competitive landscape will include established European players, particularly French and Portuguese developers with Atlantic experience, as well as Norwegian floating wind specialists. North East Scotland's competitive edge lies in its integrated capability set: not just individual component supply, but the ability to deliver across the full floating wind value chain from geotechnical survey through installation to long-term O&M, developed through decades of harsh-environment offshore operations.

Practical steps this week:

- Review MITECO's consultation documents and submit responses highlighting floating wind capabilities and North Sea operational track record.

- Identify Spanish partners — port operators, fabricators, environmental consultants — for consortium formation.
- Use your Perplexity AI Export Marketing Hub for market intelligence and introductions.
- Track the auction timeline closely — Spain's political commitment to floating wind is strong, and first contracts could be awarded by late 2026 or early 2027.

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7. Events and Resources

- 7th UK CCUS & Hydrogen Decarbonisation Summit — 10–11 February, Leeds: Focus on CCUS implementation and hydrogen industrial decarbonisation.
- Spain floating wind auction consultation — submissions open until 24 February via MITECO.
- Netherlands IJmuiden Ver Gamma-A tender — 1 GW subsidised offshore wind farm; applications expected from September 2026.
- Hamburg Declaration full text — published 3 February on UK Government and Bundeskanzler websites; essential reading for cross-border opportunity mapping.
- CfD AR7 analysis — legal and advisory firms publishing detailed guides on AR7 implications for developers and supply chain.

Energy Transition Weekly – Global Edition is designed for time-poor senior executives in North East Scotland's energy supply chain. It covers verified developments from the last seven days only, connecting global offshore low-carbon energy trends with actionable commercial intelligence.

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