

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 12 September 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

EXECUTIVE SUMMARY

The week to 12 September 2026 delivered the largest single financing event in the German Baltic offshore wind pipeline this year. On 11 September Skyborn Renewables confirmed financial close on the 976.5 MW Gennaker offshore wind farm off the German Baltic coast, with total project cost of up to approximately EUR 3 billion supported by a EUR 2.1 billion non-recourse debt package from a consortium of 16 commercial lenders together with the European Investment Bank, and equity from Skyborn Renewables and minority shareholder Stadtwerke Munchen. The project comprises 63 Siemens Gamesa SG 14-236 turbines, with monopiles from EEW, transition pieces from Dajin Heavy Industries, foundation transport and installation by Seaway7 and turbine erection by Fred. Olsen Windcarrier. Revenue is largely contracted, with 600 MW sold to Amazon and 100 MW to Uniper under corporate power purchase agreements concluded earlier in the year. Offshore installation is scheduled to begin in mid-2027 and complete by the end of 2028, which puts the entire marine and secondary steel subcontract layer into procurement over the coming twelve months. Skyborn chief executive Patrick Lammers and Stadtwerke Munchen chief executive Dr Florian Bieberbach both framed the close as evidence that Baltic projects can reach bankability on contracted corporate offtake rather than state support, a structural signal for the way German projects will be financed from here.

Two further developments reframed the cost and delivery agenda. On 8 September a DNV-led study concluded that industrialisation and standardisation of design, fabrication and installation practice could cut North Sea offshore wind costs by up to 28 per cent, a finding that directly strengthens the commercial case for repeatable Tier 2 and Tier 3 supply packages over bespoke engineering.

On 10 September Boskalis put its newly acquired subsea rock installation vessel Windpiper to work on its first commercial campaign at the 1.44 GW Baltyk 2 and Baltyk 3 projects offshore Poland for the Equinor and Polenergia joint venture, loading a record cargo of nearly 45,000 tonnes of rock in Norway and placing cable protection material through the vessel inclined fallpipe.

The two Polish projects will host 100 Siemens Gamesa SG 14-236 DD turbines of 14.4 MW each, sited approximately 37 and 22 kilometres off Ustka and Leba, with first power in 2027 and full commissioning in 2028.

In the Netherlands, RWE and TotalEnergies confirmed on 8 September that the 795 MW OranjeWind project has formally entered its offshore construction phase with the first of 53 monopile foundations installed and full operation targeted for early 2028, while the European Commission gave a preliminary positive assessment releasing a further EUR 661 million to the

Netherlands against nine milestones and fifteen targets spanning offshore wind expansion, building renovation and green hydrogen research and demonstration.

Carbon capture recorded its most significant European milestone to date. On 7 September Yara officially inaugurated Europe largest industrial carbon capture facility at Yara Sluiskil in Zeeland, the Netherlands, in the presence of Norwegian Prime Minister Jonas Gahr Store, Dutch Prime Minister Rob Jetten and European Commissioner for Climate, Net Zero and Clean Growth Wopke Hoekstra. The plant will capture and liquefy up to 800,000 tonnes of CO₂ a year from ammonia production for shipment to Oygarden in Norway and permanent storage by Northern Lights some 2,600 metres below the seabed, with roughly 12 million tonnes expected to be stored over fifteen years, completing the first full cross-border capture, transport and storage value chain in Europe.

Hydrogen momentum was broad rather than deep: Uniper completed the first phase of its Wilhelmshaven hydrogen import terminal Open Season having secured sufficient capacity reservations to advance development, Air Products and RWE signed a renewable power purchase agreement for Rotterdam covering a future liquefaction plant meeting EU RFNBO criteria, the Valencian government granted EUR 76 million to BP for the Castellon green hydrogen phase 2 demonstration facility and sustainable fuels pre-treatment over 2026 to 2029, Lithuania completed a EUR 10 million 3 MW green hydrogen plant in Vilnius, and Alfa Laval was contracted to supply 60 heat exchangers to the Onuba H₂ project in Spain.

On the Norwegian Continental Shelf, 21 exploration and production companies applied in the APA 2026 round for an expanded predefined area enlarged by 70 blocks and part-blocks across the North Sea, Norwegian Sea and Barents Sea with awards expected in early 2027, Var Energi awarded Odfjell Drilling a three-year USD 518 million contract for the semi-submersible Deepsea Bergen starting in early 2028 and extending firm backlog to the first quarter of 2031, and Eni awarded McDermott a USD 500 to 750 million subsea contract for the Cronos gas development offshore Cyprus.

In Brussels the European Parliament industry committee backed the TEN-E revision by 56 votes to 10 and voted 61 to 6 to open negotiations with the Council, with Grids Package permitting talks expected in October and a post-2030 renewables framework proposal due by the end of 2026. Geothermal produced the week most striking technical story, with Icelandic Orkuveitan indicating 20 to 50 MW potential from the single superhot IDDP-3 well to be drilled at Nesjavellir in the fourth quarter of 2026. Marine energy and hydropower in non-UK Europe were genuinely quiet this week and are reported as such rather than padded.

Headline Signals — Week Ending 12 September 2026

- Skyborn Renewables reached financial close on the 976.5 MW Gennaker Baltic project on 11 September, with up to EUR 3 billion total cost and a EUR 2.1 billion non-recourse debt package from 16 commercial lenders plus the European Investment Bank; offshore installation runs mid-2027 to end-2028.
- Yara inaugurated Europe largest industrial carbon capture facility at Sluiskil in the Netherlands on 7 September, capturing up to 800,000 tonnes of CO₂ a year for Northern Lights storage in Norway and completing the first full cross-border CCS chain in Europe.

- A DNV-led study published on 8 September found that industrialisation and standardisation could cut North Sea offshore wind costs by up to 28 per cent, shifting procurement preference towards repeatable rather than bespoke supply packages.
- Boskalis started the first commercial campaign of its rock installation vessel Windpiper at the 1.44 GW Baltyk 2 and 3 projects offshore Poland on 10 September, carrying a record cargo of nearly 45,000 tonnes of rock for export cable protection.
- RWE and TotalEnergies confirmed on 8 September that the 795 MW OranjeWind project has entered its offshore construction phase, with the first of 53 monopiles installed and full operation targeted for early 2028.
- Norway received APA 2026 applications from 21 exploration and production companies for an expanded predefined area enlarged by 70 blocks and part-blocks across the North Sea, Norwegian Sea and Barents Sea, with awards expected in early 2027.
- Var Energi awarded Odfjell Drilling a three-year contract worth approximately USD 518 million for the semi-submersible Deepsea Bergen starting in early 2028, extending firm backlog to the first quarter of 2031.
- Eni awarded McDermott a subsea contract valued between USD 500 million and USD 750 million for the Cronos gas field development offshore Cyprus, McDermott first subsea award with Eni.
- The European Parliament industry committee backed the TEN-E revision by 56 votes to 10 on 10 September and voted 61 to 6 to open Council negotiations; Grids Package permitting talks are expected in October and a post-2030 renewables proposal by end-2026.
- Uniper completed phase one of the Wilhelmshaven hydrogen import terminal Open Season with sufficient capacity reservations to advance development, while Air Products and RWE signed a Rotterdam renewable power purchase agreement covering a future RFNBO-compliant liquefaction plant.
- Icelandic Orkuveitan indicated 20 to 50 MW potential from the single superhot IDDP-3 well targeting above 400 degrees Celsius at 4 to 5 kilometres depth, to be drilled at Nesjavellir in the fourth quarter of 2026.

1. Offshore Wind — Fixed Bottom

Skyborn Reaches EUR 3 Billion Financial Close on 976.5 MW Gennaker — 11 September

Skyborn Renewables confirmed financial close on the Gennaker offshore wind farm in the German Baltic Sea, a 976.5 MW project with total cost of up to approximately EUR 3 billion. The debt structure is a EUR 2.1 billion non-recourse package provided by a consortium of 16 commercial lenders together with the European Investment Bank, with equity contributed by Skyborn Renewables and minority shareholder Stadtwerke Munchen. Individual lender names were not disclosed. Revenue is substantially contracted through corporate power purchase agreements concluded earlier in 2026, with 600 MW sold to Amazon and 100 MW to Uniper, covering the bulk of the wind farm output.

The supply chain is now fixed. Siemens Gamesa will supply 63 SG 14-236 turbines, EEW will fabricate the monopiles, Dajin Heavy Industries the transition pieces, Seaway7 holds foundation transport and installation, and Fred. Olsen Windcarrier will erect the turbines. Offshore installation is scheduled to begin in mid-2027 and complete by the end of 2028. Skyborn chief executive Patrick Lammers and Stadtwerke Munchen chief executive Dr Florian Bieberbach both positioned the close as demonstrating that Baltic projects can be financed on contracted corporate offtake rather than state support.

NES SALES OPPORTUNITY

Twelve-Month Procurement Window Opens Beneath Five Named Tier 1 Contractors

Financial close is the moment the Tier 2 and Tier 3 subcontract layer is bought. With offshore installation starting mid-2027, procurement for secondary steel, access platforms, boat landings, internal cassettes, coatings, marine support, survey, noise mitigation, offshore personnel, mechanical completion, HV termination and testing runs from now through mid-2027. The five named Tier 1 holders are the correct entry points, not the developer.

Seaway7 and Fred. Olsen Windcarrier are the two highest-value engagement targets for NES marine services firms, since foundation transport and installation and turbine erection both require substantial subcontracted marine, survey and offshore labour scope in the German Baltic. EEW and Dajin will be sourcing outfitting and completion scope ahead of load-out.

Named engagement targets: Skyborn Renewables procurement, Stadtwerke Munchen, Seaway7, Fred. Olsen Windcarrier, EEW Special Pipe Constructions, Dajin Heavy Industries, and Siemens Gamesa Germany.

DNV Study Finds Standardisation Could Cut North Sea Costs by up to 28 Per Cent — 8 September

A DNV-led study published on 8 September concluded that industrialisation and standardisation across design, fabrication and installation could reduce North Sea offshore wind costs by up to 28 per cent. The finding matters commercially because it reframes what developers and Tier 1 contractors will reward in the supply chain. Repeatable, standardised, series-produced packages with demonstrable throughput and qualification records become more valuable than bespoke engineering solutions priced project by project.

NES SALES OPPORTUNITY

Reposition Capability Statements Around Repeatability and Throughput

The commercial implication for NES firms is a change in how capability should be presented. Where oil and gas heritage marketing emphasises bespoke engineering problem-solving for one-off assets, offshore wind buyers responding to this cost agenda will reward series capacity, standard product families, fixed unit pricing, documented cycle times and qualification against repeated identical scopes.

Practical action is to rewrite the top of the capability statement around units per month, standard product ranges, tooling investment and repeat delivery evidence, and to bring fixed unit rates rather than day rates to first meetings with Tier 1 contractors on Gennaker, Baltyk and OranjeWind.

Named engagement targets: DNV Energy Systems Norway and Germany, and the procurement teams at Seaway7, Van Oord, Boskalis, Jan De Nul and Heerema.

Windpiper Begins First Rock Installation Campaign at Baltyk 2 and 3 — 10 September

Boskalis placed the first rock at the Baltyk 2 and Baltyk 3 offshore wind farms using its newly acquired subsea rock installation vessel Windpiper, which sailed to Norway to load a record cargo of nearly 45,000 tonnes before installing material through its inclined fallpipe to protect the export cables. The two projects, developed by Equinor and Polenergia Offshore Wind Poland, will comprise 100 Siemens Gamesa SG 14-236 DD turbines of 14.4 MW each for a combined 1.44 GW, sited approximately 37 kilometres and

22 kilometres from the coastline near Ustka and Leba respectively, with export cables running to the Polish mainland. First power is scheduled for 2027 and full commissioning for 2028. Van Oord also features in the project marine scope.

With all foundations in place at the start of September and cable protection now under way, the Polish Baltic has moved decisively into the electrical and completion phase. The remaining scope on both projects covers offshore substation topsides, inter-array and export cabling, turbine installation, mechanical completion and pre-commissioning through 2027 and into 2028.

NES SALES OPPORTUNITY

Polish Baltic Completion Phase Is the Nearest-Term Addressable Scope in Europe

Cable protection, topside installation, cable pull-in and termination, mechanical completion, HV testing and offshore commissioning labour are the scopes now being bought at Baltyk 2 and 3 and across the neighbouring Baltica programme. These are precisely the disciplines where NES Tier 2 and Tier 3 firms hold directly transferable oil and gas heritage capability, and the calendar is 2027 rather than 2030.

Boskalis and Van Oord procurement teams are the right entry point for survey, metrology, ROV support, marine warranty, scour and cable protection engineering and offshore personnel scope, while Equinor Poland and Polenergia are the route into commissioning and completion frameworks. Named engagement targets: Boskalis Offshore Energy, Van Oord Offshore Wind, Equinor Poland, Polenergia Offshore Wind Poland, and Siemens Gamesa Poland service organisation.

OranjeWind Formally Enters Offshore Construction — 8 September

RWE and TotalEnergies confirmed on 8 September that the 795 MW OranjeWind project in the Dutch North Sea has formally entered its offshore construction phase, with the first of 53 monopile foundations installed. The wind farm is scheduled to be fully operational in early 2028, and the project links offshore generation to storage and hydrogen production, with output feeding TotalEnergies northern European refining system. The transition-piece-less monopile design used at OranjeWind moves main access platforms, internal cassettes and boat landings out of the fabrication yard and into a separate offshore secondary steel installation campaign following monopile completion.

European Commission Releases Further EUR 661 Million to the Netherlands — 8 to 9 September

The European Commission issued a preliminary positive assessment of the Netherlands fourth payment request, releasing a further EUR 661 million after confirming nine milestones and fifteen targets. The measures achieved include steps to expand offshore wind energy, more than 820,000 residential building energy-efficiency improvements, and research and demonstration projects for green hydrogen. The disbursement reinforces the Dutch offshore wind and hydrogen build-out that underpins the IJmuiden Ver programme and the industrial hydrogen demand centred on Rotterdam and the North Sea Canal area.

German Offshore Wind Act Amendment and BSH Survey Tender — Carry-Over

The German Federal Cabinet approved the draft amendment to the Offshore Wind Act, WindSeeG, and forwarded it to the Bundestag for parliamentary consideration, with planned entry into force on 1 January 2027. The German Offshore Wind Energy Foundation continues to engage on the two-stage bidding model and on the mandatory cyber and data security pre-qualification requirements, under which only entities

established in the European Economic Area may exercise operational control and all auction, construction and operational data must be stored within the EEA. Separately, the Federal Maritime and Hydrographic Agency has tendered preliminary geophysical investigation of Zones 3 and 4 of the German North Sea exclusive economic zone, with survey work scheduled for 2027 and 2028. EWE also opened a four-lot tender for helicopter services at the Riffgat offshore wind farm in the German North Sea covering planned maintenance and unplanned repair and troubleshooting work.

NES SALES OPPORTUNITY

EEA Establishment and Data Residency Remain the Hard Gate on German Work

The WindSeeG pre-qualification requirements are a structural barrier for UK-domiciled suppliers bidding into German offshore wind. Operational control must sit with an EEA-established entity and auction, construction and operational data must be hosted within the EEA. NES firms intending to serve Gennaker, Nordseecluster, Borkum Riffgrund or future centrally pre-investigated sites need either an EEA subsidiary or a contracted EEA partner with data hosting in place well before the first tender under the new regime in 2027.

The BSH Zones 3 and 4 survey tender and the Riffgat helicopter services tender are both live, near-term routes into the German market for geophysical survey, geotechnical interpretation, unexploded ordnance screening, marine data management and offshore aviation support.

Named engagement targets: Bundesamt für Seeschifffahrt und Hydrographie, EWE and Offshore-Windpark Riffgat GmbH, Stiftung OFFSHORE-WINDENERGIE, and Bundesnetzagentur.

2. Offshore Wind — Floating

Floatgen Passes Eight Years and 40 GWh off the French Atlantic Coast

BW Ideol confirmed that the Floatgen demonstrator has now completed eight years of continuous operation at the SEM-REV offshore test site off Le Croisic in France, with cumulative production exceeding 40 GWh from the single 2 MW turbine mounted on the BW Ideol concrete Damping Pool floating foundation. Eight years of operating data on a concrete floating substructure is directly relevant to the industrialisation case being made for French and Mediterranean floating wind, where concrete substructures are a leading candidate for series production at scale.

France AO10, Port Investment and Norwegian Utsira Nord — Carry-Over

France AO10 mega-tender covering approximately 10 GW across eleven projects, of which seven are floating and four fixed-bottom, remains open with bids closing in October 2026. ADEME has committed approximately EUR 258.5 million to five French ports at Cherbourg, Brest, Nantes-Saint-Nazaire, Port-la-Nouvelle and Marseille-Fos, leveraging around EUR 1 billion of total port investment to build floating wind assembly, marshalling and integration capacity on both the Atlantic and Mediterranean coasts. In Norway, two consortia hold project areas at Utsira Nord ahead of the subsidy auction. The DOF full-scope North Sea floating wind transport and installation award disclosed at the start of September, covering inshore marine operations, mooring pre-lay, tow-out and both dynamic and static cable installation, remains in engineering.

NES SALES OPPORTUNITY

October AO10 Deadline Is the Last Practical Window for French Consortium Positioning

Bids for the roughly 10 GW AO10 programme close in October 2026, which means consortium supply chain commitments are being finalised now. NES firms with mooring, dynamic cable, metrology, marine warranty or offshore hook-up capability should be approaching bidding developers and their nominated marine contractors immediately rather than waiting for award.

The ADEME port funding at Cherbourg, Brest, Nantes-Saint-Nazaire, Port-la-Nouvelle and Marseille-Fos creates a parallel and less contested route: port operators and their integration contractors are buying quayside services, assembly support, load-out engineering, heavy lift and mooring pre-assembly capability on a 2027 to 2030 horizon.

Named engagement targets: ADEME, Grand Port Maritime de Marseille, Port de Brest, Nantes-Saint-Nazaire Port, DOF Group procurement, and BW Ideol.

3. Hydrogen

Uniper Completes Phase One of Wilhelmshaven Import Terminal Open Season — 4 to 7 September

Uniper Hydrogen confirmed the successful completion of phase one of the Open Season for its Wilhelmshaven hydrogen import terminal, having secured sufficient market capacity reservations to advance development of the project. Wilhelmshaven is the principal candidate site for large-scale ammonia and hydrogen import into Germany, and progression of the Open Season moves the terminal towards front-end engineering and eventual construction, with cracking, storage, jetty, pipeline connection and utilities scopes all still to be procured.

Air Products and RWE Sign Rotterdam Renewable Power Purchase Agreement — 11 September

Air Products and RWE signed a renewable power purchase agreement supplying the Air Products site at Rotterdam in the Netherlands, covering its hydrogen facilities including a future liquefaction plant designed to meet EU criteria for renewable fuels of non-biological origin. RFNBO compliance is the commercial gate for hydrogen offtake in European transport and industrial markets, and dedicated renewable power contracting is the mechanism by which producers demonstrate it.

Iberian and Baltic Delivery: BP Castellon, Onuba H2 and Vilnius

The Valencian regional government granted EUR 76 million to BP for two projects at Castellon in Spain under the FEDER programme, comprising EUR 66.3 million to Castellon Green Hydrogen phase 2 S.L. for a new renewable hydrogen demonstration facility and EUR 9.7 million to BP Energy Spain to advance pre-treatment technologies for sustainable biofuels, with the initiatives spanning 2026 to 2029. Alfa Laval was contracted to supply 60 heat exchangers to the Onuba H2 project in Spain. Lithuania completed a EUR 10 million, 3 MW green hydrogen plant in Vilnius. Elsewhere, HYNAT and HYTRA combined natural hydrogen exploration and logistics across Switzerland and Germany on a well-to-wheel basis, Japan and Slovenia signed two memorandums on hydrogen cooperation, and global hydrogen investment was reported to have passed the USD 130 billion mark on energy security and resilience grounds. The Gasunie, Open Grid Europe and Thyssengas joint development agreement for a Dutch to German hydrogen corridor remains in development, and the European Commission TEN-E call for candidate hydrogen, electrolyser and CO2 projects of common and mutual interest closes on 30 September 2026.

NES SALES OPPORTUNITY

Hydrogen Scope Is Now Balance-of-Plant, Not Electrolysers

The week pattern is instructive. The value being contracted is not stack manufacture but everything around it: heat exchangers at Onuba H2, terminal infrastructure at Wilhelmshaven, liquefaction at Rotterdam, and pre-treatment technology at Castellon. NES firms with pressure equipment, cryogenic handling, piping, mechanical completion, commissioning and industrial gas heritage should target balance-of-plant and terminal packages rather than electrolyser supply.

Wilhelmshaven is the single highest-value engagement target, since phase one completion of the Open Season means front-end engineering and the associated jetty, storage, cracking, pipeline tie-in and utilities packages come to market next. The TEN-E project of common and mutual interest call closing 30 September 2026 is a route for consortium participation where a Scottish partner can be named in a European application.

Named engagement targets: Uniper Hydrogen Wilhelmshaven, Air Products Rotterdam, BP Energy Spain and Castellon Green Hydrogen phase 2 S.L., Alfa Laval, Gasunie, Open Grid Europe and Thyssengas.

4. CCUS

Yara Inaugurates Europe Largest Industrial Carbon Capture Facility at Sluiskil — 7 September

Yara officially inaugurated Europe largest industrial carbon capture facility at its ammonia and fertiliser plant at Sluiskil in Zeeland province, the Netherlands, on 7 September. The facility captures and liquefies up to 800,000 tonnes of CO₂ a year from ammonia production, with temporary storage on site before shipment by Northern Lights vessels to Oygarden in Norway and permanent storage approximately 2,600 metres below the seabed in the Norwegian North Sea. Around 12 million tonnes of CO₂ are expected to be captured and permanently stored over the next fifteen years under the project agreement signed in 2023. The inauguration was attended by Norwegian Prime Minister Jonas Gahr Store, Dutch Prime Minister Rob Jetten, European Commissioner for Climate, Net Zero and Clean Growth Wopke Hoekstra, and Yara International president and chief executive Svein Tore Holsether.

The significance is not the capture plant alone but the completion of the first full cross-border capture, transport and permanent storage value chain in Europe. The chain now supports commercial low-carbon fertiliser production, low-carbon ammonia for industrial and clean energy applications, and low-carbon marine fuels. It establishes a working commercial and regulatory template that other European industrial emitters can replicate.

NES SALES OPPORTUNITY

A Working Cross-Border Chain Turns CCS From Project Work Into Operations Work

With Sluiskil operational, the addressable scope shifts from engineering and construction to sustained operations: liquefied CO₂ shipping and marine logistics, intermediate storage terminal operations, custody transfer metering and CO₂ quality assurance, pipeline and injection well

integrity, inspection, maintenance and repair, and subsea intervention at the storage complex offshore Norway. These are long-duration recurring revenues, not one-off project awards.

The Northern Lights storage side offers the closest fit to NES oil and gas heritage capability, since injection well integrity, subsea inspection, ROV support and offshore maintenance at Oygarden and the offshore storage complex are directly transferable disciplines. The Sluiskil template also creates a repeatable route for the next wave of Dutch, Belgian, German and Nordic industrial capture sites.

Named engagement targets: Northern Lights JV, Yara Sluiskil operations, Equinor, Shell and TotalEnergies as Northern Lights partners, and Dutch industrial cluster operators in Zeeland and Rotterdam.

Wider European CCUS Activity

Worley was awarded the engineering scope for the renewable syngas demonstration unit of Belgian climate technology company D-CRBN, extending the carbon utilisation pipeline in the Flanders industrial cluster. Sinopec entered a partnership with Kazakh state organisations to advance CO₂ capture technologies through a new international initiative. In France, the AFEN association warned that national support for carbon dioxide removal remains insufficient against the European Union target of 310 million tonnes of net sinks by 2030. The European Commission TEN-E call for candidate CO₂ projects of common and mutual interest closes on 30 September 2026, and the Switzerland to Denmark biogenic CO₂ chain from a Swiss biomethanation plant at Niederwil to Danish geological storage remains in development.

5. Marine Energy

Non-UK European marine energy produced no material commercial news in the week to 12 September 2026, and this is reported as a genuinely quiet week rather than padded with adjacent or UK content. The sector focus is on the International Conference on Ocean Energy, ICOE OEE 2026, which Ocean Energy Europe is hosting with the Dutch Energy from Water Association in The Hague on 5 to 7 October 2026. The European Commission SETIS ocean energy and hydropower working group page was refreshed on 7 September without new project announcements.

The relevant carry-over context remains the IRENA flagship cost report confirming ocean energy route to commercial deployment and Ocean Energy Europe assessment of untapped European wave and tidal potential. For NES suppliers, marine energy is a positioning rather than a transacting market at present, and ICOE in The Hague in October is the practical engagement point.

6. Hydropower

Non-UK European hydropower likewise produced no new contract or investment news in the week to 12 September 2026. The market context established over recent weeks remains in force: Norwegian reservoir stocks reached a record seasonal low at the start of September, raising Nordic power price risk into the winter; Statkraft and Hydro Energi have contracted 876 GWh a year in price area NO5 across 2031 to 2040; Hydro and Eviny have signed a long-term contract of approximately 0.5 TWh a year; and Statkraft is progressing modernisation of the Vikfalli hydropower system alongside a broader Norwegian reinvestment programme.

At European level, Eurelectric and the International Hydropower Association continue to press for acceleration of pumped storage hydropower, and the Joint Research Centre assessment of hydropower and pumped storage potential remains the reference document for the refurbishment and flexibility pipeline. ENGIE separately confirmed that it has exceeded 10 GW of storage capacity worldwide, driven by summer battery storage growth across Europe, which is progressively substituting for some of the flexibility role historically expected from new pumped storage.

7. Geothermal

Orkuveitan Sees 20 to 50 MW From a Single Superhot Well at Nesjavellir — 10 September

Icelandic utility Orkuveitan indicated potential of 20 to 50 MW from the individual IDDP-3 superhot geothermal well, against 2 to 7 MW from a conventional geothermal well. IDDP-3 targets a resource above 400 degrees Celsius at approximately 4 to 5 kilometres depth, compared with typical geothermal development at 2 to 3 kilometres and up to 350 degrees Celsius. Orkuveitan has contracted Iceland Drilling to drill the well at Nesjavellir in the fourth quarter of 2026. A second research well is planned for the fourth quarter of 2027 to test water injection into the superhot system, with stimulation testing and connection of the initial well to a power plant operated by ON, Orka natturunnar, both targeted for the third quarter of 2028. The SHiFT consortium supporting technology development for resources above 400 degrees Celsius has received EUR 10 million from Horizon Europe. Orkuveitan has been explicit that 50 MW is a potential rather than a demonstrated capacity and that testing is required.

NES SALES OPPORTUNITY

Superhot Geothermal Is a High-Temperature Materials and Well Integrity Market

Superhot drilling at above 400 degrees Celsius and 4 to 5 kilometres depth is a materials, metallurgy, well integrity and high-temperature completion challenge before it is a power generation opportunity. That is deep-well engineering territory where NES oil and gas heritage in high-pressure high-temperature completions, casing design, cementing, corrosion management, downhole instrumentation and well intervention is directly relevant.

The programme has a defined multi-year calendar with wells in the fourth quarter of 2026, the fourth quarter of 2027 and stimulation and plant connection in the third quarter of 2028, and Horizon Europe funding through the SHiFT consortium provides a route for a Scottish technology partner to join a European research and demonstration consortium.

Named engagement targets: Orkuveitan, Iceland Drilling, ON Orka natturunnar, and the SHiFT consortium coordinator under Horizon Europe.

Continental Geothermal Pipeline Continues to Broaden — 7 to 11 September

Activity was widely distributed across the continent. Rig assembly is under way for geothermal drilling at Jelenia Gora in Poland, while drilling of a geothermal well at Radoszyce in Poland completed with insufficient flow. A geothermal heating project at Bad Bevensen in Germany secured federal funding, and Berlin heat planning has begun mapping geothermal at urban scale. A new study identified high-potential geothermal areas in St Gallen, Switzerland, and a seismic survey is due to start shortly for geothermal exploration in Lower Austria. Croatian geothermal development was showcased on the GreetGEO study tour, Ireland continued laying the groundwork for investable geothermal projects, and Trabzon in Türkiye

will host the sector at DSG 2026. In Iceland, Carbfix reported 99.6 per cent capture of CO₂ and hydrogen sulphide from a geothermal power plant. Arverne in France and the OMV and Energie Steiermark project in Austria remain active carry-overs.

8. Decommissioning and Norwegian Continental Shelf

Norway APA 2026 Attracts 21 Applicants for Expanded Acreage — 11 September

Twenty-one exploration and production companies, including Shell, applied for acreage in Norway APA 2026 licensing round. The predefined area was expanded by 70 blocks and part-blocks across the North Sea, Norwegian Sea and Barents Sea, and licence awards are expected in early 2027. The level of participation indicates continued exploration interest on the Norwegian Continental Shelf despite the industry focus on mature basin development and tie-back economics, and the additional acreage is intended to support future discoveries that sustain Norwegian production and export volumes.

Var Energi Awards Odfjell Drilling USD 518 Million Deepsea Bergen Contract — 10 September

Var Energi signed a letter of award with Odfjell Drilling for drilling activities using the semi-submersible Deepsea Bergen. The three-year contract starts in early 2028 following completion of the rig current commitment and extends Odfjell firm backlog to the first quarter of 2031, with estimated value of USD 518 million including mobilisation fees but excluding annual escalation, integrated services, performance bonuses and fuel incentives. Deepsea Bergen, built in 2019 and formerly named Deepsea Bollsta, was acquired by Odfjell Drilling from Northern Ocean in December 2025 and took charge of drilling at Equinor production licence 190 in June. Odfjell Drilling chief executive Kjetil Gjersdal described the award as a long-term partnership with Var Energi.

NES SALES OPPORTUNITY

Long-Dated Rig Backlog Sets Up 2027 Integrated Services Procurement

A three-year drilling contract starting in early 2028 means the integrated services layer beneath it is bought during 2027. The contract value explicitly excludes integrated services, which confirms those scopes remain separately procured: drilling fluids, waste management, casing and tubular running, wellhead maintenance, inspection, well testing, downhole tools, marine support and offshore personnel.

The same commercial logic applies to plugging and abandonment work, which increasingly shares vessels, rigs and crews with development drilling on the Norwegian Continental Shelf. NES firms holding both drilling support and well abandonment credentials should be presenting a combined offer to Var Energi and Odfjell Drilling supply chain teams through 2027.

Named engagement targets: Var Energi supply chain, Odfjell Drilling Norway, and the integrated services contract holders on Var Energi Norwegian portfolio.

Eni Awards McDermott Cronos Subsea Contract Offshore Cyprus — 8 September

Eni Cyprus Limited awarded McDermott a subsea contract valued between USD 500 million and USD 750 million for the Cronos gas field development offshore Cyprus, covering project management, engineering, procurement and installation support. The scope will be executed by McDermott Subsea and Floating Facilities business using engineering and project resources in Houston, Perth, London and Kuala Lumpur,

with offshore installation supported by the McDermott marine construction fleet including the deepwater construction vessel Amazon. Mahesh Swaminathan, senior vice president of Subsea and Floating Facilities, confirmed this is McDermott first subsea project award with Eni and expands its Eastern Mediterranean subsea presence.

North Sea Decommissioning and NCS Carry-Over

AF Gruppen and Heerema Marine Contractors hold, in consortium, a decade-long North Sea decommissioning assignment covering engineering, preparation, removal and disposal of a large offshore platform, with disposal at AF Miljibase Vats. The award was the third from the same operator within a year and will underpin long-term throughput at Vats. Ocean Installer holds a TotalEnergies decommissioning contract covering three North Sea fields, AF Offshore Decom has additional North Sea removal work in hand, and Equinor contract awards across four Norwegian development projects remain in execution. Italy separately moved to cut permitting requirements in order to lift domestic oil and gas output.

NES SALES OPPORTUNITY

Vats Throughput Is a Decade-Long Onshore and Offshore Scope Pipeline

A ten-year removal and disposal assignment at AF Miljibase Vats creates sustained demand for engineering preparation, module separation, hazardous material handling, cutting and dismantling, waste characterisation, lifting studies, marine warranty and offshore support that repeats across multiple platform campaigns rather than a single project.

The Norwegian Continental Shelf combination of APA 2026 exploration interest, long-dated drilling backlog and steady removal pipeline gives NES firms a rare position where the same capability set sells into both new development and decommissioning within one geography and one supply chain.

Named engagement targets: AF Offshore Decom and AF Miljibase Vats, Heerema Marine Contractors, Ocean Installer, Equinor Norway supply chain, and the Norwegian Offshore Directorate.

9. Industry, Policy, Grid and Corporate

Parliament Industry Committee Backs TEN-E Revision and Grid Governance — 10 September

Members of the European Parliament Industry, Research and Energy Committee backed proposed changes to the trans-European energy infrastructure regulation, TEN-E, by 56 votes to 10 with 9 abstentions, and voted 61 to 6 with 8 abstentions to open negotiations with the Council of the European Union, subject to endorsement at an upcoming plenary session in Strasbourg. The amendments would streamline planning and permitting, strengthen cross-border connections, reduce bottlenecks and give the European Commission a stronger role in developing a shared-data common energy scenario, while adding tools to identify gaps in both electricity and hydrogen networks. Authorities would be required to consider optimising existing networks or applying digital and demand-side measures before approving new physical infrastructure. Infrastructure priorities would include protection and strengthening of critical network elements, monitoring, control and digitalisation equipment, and projects linked to climate adaptation of energy infrastructure. The Commission proposed the TEN-E revision as part of its European grids package published on 10 December 2025.

The same week the Commission signalled a post-2030 renewable energy framework proposal due by the end of 2026 to support climate neutrality by 2050 and the 2040 ambition of a 90 per cent net greenhouse gas reduction against 1990 levels. Clean power accounted for 26.2 per cent of European Union final energy consumption in 2025 and renewable electricity reached almost 50 per cent of generation, but current national plans point to around 41 per cent renewable energy by 2030 against the binding 42.5 per cent target. More than 10 TWh of renewable electricity could not be used in 2024 because of grid congestion and insufficient cross-border capacity, equivalent to powering around 2.85 million European homes for a year. Redispatch cost around EUR 4.3 billion in 2024 and the Commission estimates it could reach EUR 26 billion by 2030. Official Grids Package permitting talks are expected in October 2026.

NES SALES OPPORTUNITY

Grid Constraint Is Becoming the Largest Adjacent Market to Offshore Wind

Redispatch costs rising from EUR 4.3 billion in 2024 towards a projected EUR 26 billion by 2030, alongside more than 10 TWh of curtailed renewable generation, define the commercial opportunity: HVDC converter and platform work, cable installation and protection, monitoring, control and digitalisation equipment, grid asset inspection and maintenance, and hybrid renewable-plus-storage project delivery.

The TEN-E revision explicitly elevates digitalisation, monitoring and control equipment and climate adaptation of energy infrastructure to priority status, and requires optimisation of existing networks before new build. That favours suppliers of inspection, condition monitoring, digital twin, life-extension and asset integrity services, which is a strong match for NES capability developed on ageing offshore oil and gas infrastructure.

Named engagement targets: TenneT 2GW programme, 50Hertz, Amprion, Energinet, Statnett, and HVDC package contractors currently tendering in the Netherlands and Germany.

Commission Suspends In-Depth Review of Saipem and Subsea7 Merger

The European Commission has suspended its in-depth review of the proposed all-share combination of Saipem and Subsea7, which would create a group renamed Saipem7 with approximately EUR 21 billion of annual revenue, EBITDA above EUR 2 billion, backlog of around EUR 43 billion, more than 60 construction vessels and approximately 44,000 employees, targeting EUR 300 million of annual synergies by the third year after closing. The suspension took effect while the Commission awaits additional information from the parties, and the regulatory clock restarts once that information is complete. The Phase II deadline was extended from 26 November to 16 December at the companies request, and the suspension puts that date at risk. The investigation covers subsea umbilicals, risers and flowlines, where Saipem and Subsea7 are two of only three leading global suppliers, as well as trunkline installation and subsea decommissioning. Subsea7 shareholders are due a EUR 450 million special dividend immediately before completion, with existing shareholders of each company holding 50 per cent of the combined group. The companies continue to operate independently and still target completion in the second half of 2026.

NES SALES OPPORTUNITY

SURF Market Consolidation Raises the Value of Independent Tier 2 Capacity

If Saipem7 completes, the European subsea umbilicals, risers and flowlines market consolidates from three leading suppliers to two, and the Commission is explicitly examining trunkline installation and subsea decommissioning alongside it. Operators and their advisers will look for credible independent Tier 2 capacity to preserve competitive tension in fabrication, installation support, testing and intervention scopes.

The practical action is to engage both sides now. Saipem and Subsea7 procurement teams are planning integration and will rationalise supplier lists, which creates both displacement risk and consolidation opportunity for firms that can serve the combined group at scale. Independent contractors and operators, meanwhile, are the market for alternative capacity.

Named engagement targets: Saipem procurement, Subsea7 supply chain, Equinor and Var Energi category management, and independent SURF and subsea intervention contractors in Norway and the Netherlands.

Corporate, Storage and Market Developments

Qualitas Energy signed an agreement to acquire the 5.8 GW European clean energy platform of Cero Generation from Macquarie Group, with Cero Generation continuing under its existing brand as an independent Qualitas Energy portfolio company. ENGIE confirmed it has exceeded 10 GW of storage capacity worldwide, driven by summer battery energy storage growth across Europe. Andel agreed to sell a 1.73 per cent stake in Orsted for approximately DKK 3.09 billion, around USD 467 million, and Orsted received a final opinion in its Denmark and United Kingdom tax arbitration concerning Walney Extension and Hornsea 1. In France, the Hauts-de-France regional council passed an onshore wind moratorium by eight votes, drawing objection from the renewable energy trade body, while France selected 109 priority territories to accelerate local electrification. Enercon will supply seven turbines to Qair for the Cobadin wind farm in Romania, and Morocco launched a feasibility study for its first offshore wind farm. In vessels, Jan De Nul extra-large cable-laying vessel Fleeming Jenkin began sea trials at CMHI Haimen ahead of sister vessel William Thomson, Tersan Shipyard in Turkiye laid the keel for an LS Marine Solution cable installation vessel, and Stillstrom by Maersk trialled an automated cable control system for offshore charging using a vessel on dynamic positioning.

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	Gennaker 976.5 MW financial close 11 September — EUR 3 bn project, five named Tier 1 contractors now buying secondary steel, marine support, survey, completion and HV testing ahead of mid-2027 offshore start	Fixed Wind	Skyborn, Stadtwerke Munchen, Seaway7, Fred. Olsen Windcarrier, EEW, Dajin	Buy now to mid-2027	HIGH
2	Baltyk 2 and 3 completion phase — Windpipor rock installation under way, topsides, cabling, turbines and pre-commissioning through 2027 to	Fixed Wind	Boskalis, Van Oord, Equinor Poland, Polenergia, Siemens Gamesa Poland	Live now	HIGH

	2028 first power and full commissioning				
3	Yara Sluiskil CCS operational 7 September — 800 kt/yr chain to Northern Lights creates recurring LCO2 shipping, terminal operations, metering, well integrity and subsea IMR scope	CCUS	Northern Lights JV, Yara Sluiskil, Equinor, Shell, TotalEnergies	Operations now	HIGH
4	Uniper Wilhelmshaven Open Season phase 1 complete — terminal FEED plus jetty, storage, cracking, pipeline tie-in and utilities packages next to market	Hydrogen	Uniper Hydrogen, Wilhelmshaven port authority, EPC bidders	FEED next	HIGH
5	France AO10 approx 10 GW bids close October 2026 — last practical window to be named in a bidding consortium supply chain	Floating Wind	AO10 bidding developers, ADEME, Cherbourg, Brest, Nantes-Saint-Nazaire ports	Closes Oct 2026	HIGH
6	Var Energi and Odfjell Deepsea Bergen USD 518 m award — integrated services explicitly excluded from value and bought separately during 2027 for early 2028 start	NCS Drilling	Var Energi supply chain, Odfjell Drilling Norway	Procure 2027	MEDIUM
7	German WindSeeG EEA establishment and data residency gate, plus live BSH Zones 3 and 4 survey tender and Riffgat four-lot helicopter services tender	Policy / Survey	BSH, EWE and Riffgat GmbH, Stiftung OFFSHORE-WINDENERGIE, Bundesnetzagentur	Law 1 Jan 2027	MEDIUM
8	TEN-E revision backed 56-10 on 10 September and Grids Package permitting talks in October — monitoring, digitalisation, life extension and asset integrity elevated to priority	Grid / Digital	TenneT 2GW, 50Hertz, Amprion, Energinet, Statnett	Talks Oct 2026	MEDIUM
9	AF Gruppen and Heerema decade-long North Sea removal assignment — repeat platform campaigns and sustained AF Miljibase Vats throughput	Decom / NCS	AF Offshore Decom, AF Miljibase Vats, Heerema, Ocean Installer	Rolling to 2036	MEDIUM
10	Orkuveitan IDDP-3 superhot well 20 to 50 MW potential, drilling Q4 2026, second well Q4 2027 — HPHT completions, well integrity and high-temperature materials scope	Geothermal	Orkuveitan, Iceland Drilling, ON Orka natturunnar, SHiFT consortium	Q4 2026 drill	LOW-MED

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