

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 6 June 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

IN THIS WEEK'S BRIEFING

Coverage: 31 May – 6 June 2026. Sectors: offshore wind (fixed-bottom & floating), hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning, grid & policy.

Headlines: OEUK Edinburgh CCS & Hydrogen Summit (1–2 June) delivers DNV “Integrated and Resilient North Sea” report, Xodus cross-border CO₂ transport study and University of Aberdeen offshore spatial-conflict paper; Northern Lights JV awards second 12,000 m³ LCO₂ carrier charter to K LINE / MISC consortium; EU Energy Council launches geothermal push and European Geothermal Alliance under the Net-Zero Industry Act; European Geothermal Summit convenes in Brussels (4 June); Vulcan Energy advances Lionheart into execution mode — total project capex updated to \$3.9bn with LSC-1 flowing 105–125 l/s and LSC-2 reaching 3,000 m; Eavor wins Overall CleanTech Innovation of the Year at the 2026 CleanTech Breakthrough Awards with Geretsried operational; TotalEnergies confirms Centre Manche 2 (1.5 GW) authorization filing with RWE consortium partner; Air Liquide details ELYgator offtake to TotalEnergies Antwerp refinery and a new 250 MW Zeeland JV (30,000 t/yr H₂, 2029); Everfuel secures €244.9m support for Project Frigg; European Commission approves German €1.3bn hydrogen aid follow-on; Ocean Winds delivers 30 MW to French grid from Gulf of Lion; Ecowende installs first turbine at the 760 MW Dutch project; project Greensand first commercial injection now imminent (June).

Executive Summary

The week to 6 June 2026 saw two major European industry assemblies deliver concrete output. The OEUK CCS & Hydrogen Summit at the Edinburgh Sheraton Grand (1–2 June) ended with three substantive deliverables: a DNV report commissioned by OEUK titled “An Integrated and Resilient North Sea” setting out a cross-basin infrastructure framework for the UK, Norway, Netherlands and Denmark; a Xodus Group study on “Enabling Infrastructure for Cross-Border CO₂ Transport” scoping the shipping, intermediate storage and pipeline corridors needed to move stranded continental volumes to North Sea storage; and a University of Aberdeen contribution on offshore spatial conflicts between CCS, hydrogen, wind and fisheries in the Central North Sea. The European Geothermal Summit (EGEC) in Brussels on 4 June convened on the same day that the EU Energy Council formally launched a continental geothermal push and floated a European Geothermal Alliance under the Net-Zero Industry Act — a structural moment for the geothermal supply chain that arrives directly behind Vulcan Energy’s Lionheart funding close of the previous week.

CCUS produced the week’s sharpest single procurement signal. On 3 June Northern Lights JV (Equinor, Shell, TotalEnergies) awarded a second 12,000 m³ liquefied-CO₂ carrier time charter to the K LINE / MISC consortium, doubling the fleet that will move captured CO₂ from continental capture sites (Yara Sluiskil,

Heidelberg Materials Brévik, Ørsted Asnæsværket and the Stockholm Exergi-Wacker / Heidelberg follow-on volumes) into the Øygarden terminal. Parallel news flow from the OEUK Edinburgh summit and the European Commission June infringements package (4 June, with Hungary/Romania referrals on energy efficiency and Spain/Poland referrals on ETS) confirmed the EU's shift to enforcement-mode delivery of the 2030 climate package. Project Greensand (INEOS/Wintershall, Nini West) is now publicly confirmed by mining.com.au and industry sources as moving to first commercial injection in June, with Northern Lights, Porthos and Prinós all maintaining their commercial start windows.

Geothermal, floating wind and hydrogen all contributed material progress. Vulcan Energy moved its Lionheart project explicitly into "execution mode", with revised total project capex of \$3.9 billion, LSC-1 well flowing at 105–125 l/s, LSC-2 reaching its 3,000 m target depth, a second drilling rig from Vercana being commissioned in H2 2026, a Phase 2 pre-feasibility study scheduled for H2 2026, and the Frankfurt Industriepark Höchst lithium electrolysis plant on track for first output in 2028. Eavor Technologies won the "Overall CleanTech Innovation of the Year" at the 2026 CleanTech Breakthrough Awards on 5 June, with the Geretsried Eavor-Loop now in commercial operation. Ocean Winds delivered its first 30 MW from the Gulf of Lion floating cluster to the French grid (1 June); RTE and the French Ministry confirmed 13 candidates pre-selected for the AO10 / 10 GW Mediterranean tender. Air Liquide expanded its Rotterdam ELYgator industrial offtake architecture (supply contract to TotalEnergies Antwerp refinery via the cross-border H₂ pipeline) and announced a 50/50 JV with TotalEnergies for a second 250 MW electrolyser in Dutch Zeeland (30,000 t/yr from 2029). Everfuel secured €244.9m of state support for Project Frigg (1 June) and Germany's broader Hydrogen Support Fund received its EU State-aid clearance (2 June). For North East Scotland the cumulative pattern is unambiguous: CO₂ shipping, European geothermal drilling, French Mediterranean floating supply chain, Rotterdam-Antwerp hydrogen O&M and continental enforcement-driven grid investment are all simultaneously open.

Headline Signals — Week Ending 6 June 2026

- Northern Lights JV awards second 12,000 m³ LCO₂ carrier time charter to K LINE / MISC consortium (3 June): doubles the dedicated shipping fleet that will move captured CO₂ from continental capture sites to the Øygarden terminal; second vessel slot scheduled for late-2027 delivery; reinforces Øygarden as the Northwest European CO₂ logistics hub.
- OEUK CCS & Hydrogen Summit Edinburgh (1–2 June) delivers three substantive outputs: DNV "An Integrated and Resilient North Sea" infrastructure framework (commissioned by OEUK); Xodus "Enabling Infrastructure for Cross-Border CO₂ Transport" study; University of Aberdeen offshore spatial-conflict paper. All three move the cross-basin CO₂ architecture from concept to engineering scope.
- EU Energy Council launches continental geothermal push and proposes European Geothermal Alliance under Net-Zero Industry Act (1 June): Council conclusions name geothermal as a strategic technology; alliance to coordinate Member State actions on permitting, drilling support and district-heating offtake; immediately precedes EGEC Brussels summit.
- European Geothermal Summit (EGEC) Brussels (4 June): annual industry convening, with Vulcan, Cindrigo, Eavor, GEL, Turboden, Geothermal Anywhere and EnBW geothermal procurement teams in one venue; immediately follows the Council conclusions above.
- Vulcan Energy advances Lionheart into "execution mode" (2–3 June): updated total project capex \$3.9bn (Lionheart funding \$2.2bn plus parent costs); LSC-1 well flowing 105–125 l/s; LSC-2 reaches 3,000 m target depth; second drilling rig (Vercana) commissioning H2 2026; Phase 2 pre-

feasibility H2 2026; Frankfurt Industriepark Höchst electrolysis plant on track for 2028 first output.

- Eavor Technologies wins Overall CleanTech Innovation of the Year, 2026 CleanTech Breakthrough Awards (5 June): closed-loop Eavor-Loop architecture; Geretsried project (Germany) in commercial operation supplying district heat and grid power; multi-project global pipeline including New Mexico and Japan.
- Ocean Winds delivers first 30 MW to French grid from Gulf of Lion floating cluster (1 June); RTE confirms 13 candidates pre-selected for AO10 / 10 GW Mediterranean floating tender including BlueFloat-Sumitomo-Akuo, EDF Renouvelables-Maple Power, Equinor-Océole, Iberdrola, Ocean Winds, RWE-BOURBON, Shell-EnBW, Qair-TotalEnergies-Corio, wpd, Vattenfall, Cobra, Eni Plenitude and BayWa-Elicio.
- Air Liquide expands ELYgator industrial architecture (1 June): cross-border H₂ pipeline supply contract from 200 MW Rotterdam ELYgator to TotalEnergies Antwerp refinery (23,000 t/yr decarbonised hydrogen); 50/50 JV with TotalEnergies for second 250 MW electrolyser in Dutch Zeeland (30,000 t/yr H₂ from 2029).
- Everfuel secures €244.9m EU H₂ Bank support for Project Frigg (1 June): one of the largest single RFNBO hydrogen awards of the EU H₂ Bank to date; Danish project; reinforces the Danish-German cross-border H₂ corridor.
- TotalEnergies confirms Centre Manche 2 (1.5 GW Normandy) authorization filing with RWE as consortium partner (1 June, follow-up to last week): €4.5bn capex; FID early 2029; commissioning around 2033; consortium structure now public.
- Project Greensand first commercial injection imminent (June, INEOS-Wintershall, Nini West reservoir, Danish North Sea): initial 400 kt/yr rate scaling toward 8 Mt/yr by 2028; one of three flagship Northwest European CO₂ chains entering commercial operation in 2026–2027.

1. Offshore Wind — Fixed Bottom

TotalEnergies-RWE Consortium for Centre Manche 2 (1.5 GW) — Authorization Filing Confirmed (1 June)

Confirmatory reporting on 1 June clarified the consortium structure for the 1.5 GW Centre Manche 2 wind farm off Normandy: TotalEnergies is operator with RWE as named consortium partner, with the authorization application filed in the last week of May. The project will host 70–100 turbines on monopile foundations across roughly 250 km² of seabed approximately 32 km off the Cotentin Peninsula, with an 80 km offshore export cable to a new onshore substation north of Bayeux. Total capital cost remains indicated at €4.5 billion, FID targeted in early 2029, and first power around 2033. The RWE inclusion is materially important because it brings RWE's offshore wind execution capability (Nordseecluster, Sofia) into French BoP procurement for the first time at this scale — widening the Tier 1 panel beyond the traditional French champions (Eiffage, Bouygues, Saipem) into German offshore wind supply-chain heritage. Centre Manche 2 is the principal French fixed-bottom prequalification window of the post-WindEurope-Madrid procurement cycle.

NES SALES OPPORTUNITY

TotalEnergies-RWE Centre Manche 2 — French Fixed-Bottom Tier 2/3 Prequalification Window Now Open

With consortium structure now public and authorization filed, the Tier 1 entry-points for NES suppliers widen to include RWE's German offshore wind framework panels alongside the French Tier 1s (Eiffage, Bouygues, Saipem). Aberdeen suppliers in monopile transition pieces, secondary steel, offshore substation topsides, cable accessories, marine warranty surveying, scour protection, ROV inspection, geotechnical site investigation, and onboard logistics should target both TotalEnergies (Paris) and RWE (Essen / Hamburg) BoP procurement in parallel. Cherbourg, Le Havre, Saint-Nazaire and Brest remain the priority French port hubs; submit pre-qualification dossiers in Q3 2026 to land at the right moment in the shortlisting process for FID in early 2029.

Ecowende Installs First Turbine at 760 MW Hollandse Kust West Site VI

Ecowende (the Shell-Eneco-Van Oord consortium) installed the first turbine at its 760 MW Hollandse Kust West Site VI project in the Dutch North Sea. The project is a benchmark for ecologically-optimised offshore wind design — nature-inclusive monopile design, eagle-deterrent painting, and seabed-restoration measures. Installation campaign continues through 2026; commissioning targeted late 2026/early 2027. The Hollandse Kust West Site VI campaign is now one of the two most active Dutch North Sea installation campaigns of 2026 alongside the Nordseecluster A (RWE / Norges Bank-Allianz) German campaign for which DNV issued a third project-milestone certificate during the week.

NES SALES OPPORTUNITY

Ecowende HKW VI and Nordseecluster A — Dutch and German North Sea T&I Activity

NES suppliers in cable accessories, scour protection, transition piece outfitting, monopile commissioning, marine warranty surveying, ROV inspection and Tier 2 lifting accessories should engage Van Oord (Rotterdam), Shell (The Hague), Eneco (Rotterdam) and the RWE / Nordseecluster A procurement chain (Essen) for follow-on contracts in 2026–2027. The two campaigns together provide the highest density of European North Sea execution-phase fixed-bottom procurement of 2026.

European Energy Sells Dutch Wind Portfolio to Westra (3 June)

European Energy announced on 3 June that it has divested its Dutch onshore-and-offshore-adjacent wind portfolio to Westra, reflecting a strategic reallocation of capital towards the Danish-German cross-border hydrogen corridor (in particular the Kassø e-methanol project funded by Germany's cross-border H₂ auction announced last week). The transaction continues the European Energy reposition away from pure-play wind and into integrated power-to-X. For NES supplier intelligence the signal is structural: Tier 1 European IPPs are now consolidating wind portfolios while activating hydrogen-and-derivatives platforms behind them, and the principal procurement growth point for Aberdeen suppliers is therefore the downstream H₂ / e-methanol / PtX engineering envelope rather than the upstream wind asset.

2. Offshore Wind — Floating

Ocean Winds Delivers First 30 MW from Gulf of Lion Floating Cluster (1 June)

Ocean Winds (the EDPR-ENGIE joint venture) confirmed on 1 June that the Gulf of Lion floating wind cluster off the French Mediterranean has delivered its first 30 MW to the French grid. The cluster is one of two French commercial floating pilots; first energisation of the Eolmed (Qair) cluster off Leucate (3 × 10

MW Vestas turbines on damping-pool floaters supplied by BW Ideol) occurred in April. Ocean Winds is now generating commercial revenue from floating wind in the Mediterranean while the much larger French AO10 / Gulf of Lion 10 GW commercial tender process runs in parallel. The dual signal — commercial revenue from pilot floating wind and an active 10 GW tender — makes the French Mediterranean the single most active floating supply-chain geography in Europe through H2 2026.

French AO10 / Gulf of Lion 10 GW Floating — 13 Candidates Pre-Selected

RTE and the French Ministry confirmed pre-selection of 13 candidate consortia for the AO10 10 GW Mediterranean floating tender process, the largest single floating wind tender in Europe to date. Named candidates include: BlueFloat Energy-Sumitomo-Akuo; EDF Renouvelables-Maple Power; Equinor-Océole; Iberdrola; Ocean Winds; RWE-BOURBON Subsea Contracting; Shell-EnBW; Qair-TotalEnergies-Corio; wpd; Vattenfall; Cobra; Eni Plenitude; and BayWa r.e.-Elicio. Awards are expected late 2026 / early 2027 for the first 3.2 GW Mediterranean tranche. The pre-selection list confirms that virtually every major European developer is competing for the French floating cycle. Occitanie regional government continues to push the Mediterranean industrial-hub plan (Port-la-Nouvelle, Marseille-Fos, Sète) as the dedicated regional floating supply-chain build-out.

NES SALES OPPORTUNITY

French AO10 Mediterranean Floating — 13-Consortium Tier 2/3 Procurement Cycle Open Now

With 13 active consortia and awards in late 2026/early 2027, the H2 2026 prequalification window is the principal commercial action. NES suppliers in mooring, dynamic cable, towage, FPSO-heritage marine warranty, geotechnical site investigation and Mediterranean port operations should secure prequalification dossiers with all 13 consortia in parallel; the Aberdeen Tier 2/3 entry-point is widest with the consortia that include continental Tier 1s (RWE-BOURBON, Shell-EnBW, Qair-TotalEnergies-Corio, Equinor-Océole). Port-la-Nouvelle, Marseille-Fos and Sète are the priority French Mediterranean port hubs; BW Ideol's Brest factory is a secondary entry-point on the Atlantic side.

The Occitanie regional industrial-hub plan provides a parallel regional-government access route via direct engagement with Région Occitanie economic development team.

3. Hydrogen

Air Liquide-TotalEnergies: ELYgator Industrial Offtake and New 250 MW Zeeland JV (1 June)

Air Liquide expanded the industrial architecture of its 200 MW ELYgator project at the Port of Rotterdam during the week with two announcements. First, ELYgator will deliver 23,000 tonnes/year of decarbonised hydrogen to the TotalEnergies refinery in Antwerp from late 2026, routed via the existing cross-border H₂ pipeline infrastructure between Rotterdam and Antwerp — the first commercial-scale cross-border RFNBO supply contract from the new commercial electrolyser fleet. Second, Air Liquide and TotalEnergies announced a 50/50 joint venture for a second 250 MW electrolyser project, to be built in Dutch Zeeland with first hydrogen output of 30,000 t/yr targeted for 2029. The TotalEnergies refinery offtake and the new Zeeland 250 MW JV together transform ELYgator from a single demonstrator project into the operational anchor of a multi-asset Rotterdam-Antwerp-Zeeland industrial hydrogen platform. The Berlin-Siemens electrolyser delivery process announced last week continues; the first PEM modules are now on site.

NES SALES OPPORTUNITY

Air Liquide-TotalEnergies Rotterdam-Antwerp-Zeeland Cluster — Multi-Project O&M and EPC Procurement

With ELYgator commissioning H2 2026, Antwerp offtake from late 2026, and a new 250 MW Zeeland project entering FEED for 2029 operation, NES suppliers in hydrogen safety engineering, control systems, water treatment, electrical fit-out, pressure vessel inspection, instrumentation, and aftermarket O&M support should engage Air Liquide (Paris/Rotterdam), TotalEnergies (Paris/Antwerp/Zeland) and Siemens Energy (Erlangen/Berlin) procurement now. Rotterdam-based Tier 1s (Bilfinger, Stork, Mammoet, Croon Elektrotechniek) and Antwerp-based contractors provide the principal Tier 2/3 entry-points. Aberdeen process engineering and hazardous-area instrumentation heritage transfers directly.

The Zeeland 250 MW FEED phase from H2 2026 is the next big procurement decision point; combined annual O&M absorption across the three assets is likely to reach €35–40m/year once all three are operational.

Everfuel Secures €244.9m EU H₂ Bank Support for Project Frigg (1 June)

Everfuel announced on 1 June that it has secured €244.9 million of support from the EU Hydrogen Bank for Project Frigg, its flagship green hydrogen production project in Denmark. The award is one of the largest single RFNBO hydrogen support payments yet made by the EU H₂ Bank, signalling a deliberate concentration of EU funding into the Danish-German cross-border hydrogen corridor. Project Frigg adds to the previously-announced Kassø e-methanol production (European Energy, 150 MW, German cross-border auction) to form the principal commercial-scale Danish RFNBO production cluster. Everfuel will use the support to fund both the production-side EPC and the cross-border hydrogen logistics (compression, distribution, refuelling network) within Denmark and into Northern Germany.

NES SALES OPPORTUNITY

Everfuel Project Frigg — Danish RFNBO and Cross-Border Logistics Procurement

NES suppliers in compression, dispensing, pipeline integrity, valve service, gas chromatography and hydrogen distribution can access the Project Frigg procurement cycle via Everfuel (Herning, Denmark), the Danish Energy Agency (Esbjerg) and the Danish Hydrogen Backbone consortium (Energinet, Gasunie Deutschland). Project Frigg complements the Kassø cluster procurement noted in last week's briefing and brings the Danish RFNBO procurement value into the €600–800m range for 2026–2028.

German Hydrogen Support Fund Receives EU State-Aid Clearance (2 June)

Industrial Info Resources confirmed on 2 June that the European Commission has approved Germany's broader Hydrogen Support Fund under the EU State-aid framework, a follow-on clearance to the €1.3bn green hydrogen aid package approved 20 May. The Hydrogen Support Fund is the principal vehicle the German Federal Government will use to fund domestic RFNBO and offtake commitments through 2030. Combined with the Everfuel Project Frigg award and the European Commission June infringements package (see Section 9), the message is structural: continental hydrogen funding is now being deployed at scale, in parallel with continental enforcement of the 2030 climate targets.

Hydrogen Council CEO Forum: European Capacity to Double in 2026 (5 June)

S&P Global Platts reported on 5 June that the Hydrogen Council’s CEO Forum confirmed European hydrogen production capacity is set to double during 2026 as the FID and execution-phase pipeline announced in 2024–2025 translates into commissioned plant. Average European green hydrogen production cost remained at €9.46/kg — still well above grey hydrogen but moving slowly downwards as electrolyser unit costs (per kW installed) drop. The Hydrogen Council CEO message specifically called out cross-border infrastructure (TenneT recapitalisation, Hydrogen Backbone construction, Antwerp-Rotterdam-Zeeland industrial cluster) as the binding execution unlock through 2027.

4. CCUS — Carbon Capture, Use & Storage

Northern Lights Awards Second 12,000 m³ LCO₂ Carrier Charter to K LINE / MISC (3 June)

Northern Lights JV (Equinor, Shell, TotalEnergies) announced on 3 June that it has awarded a second 12,000 m³ liquefied-CO₂ carrier time charter to a consortium led by Kawasaki Kisen Kaisha (K LINE) and MISC Berhad of Malaysia. The new vessel will be a sister ship to the first “Northern Pioneer” LCO₂ carrier already in service, scheduled for delivery in late 2027. The second carrier doubles the dedicated shipping fleet available to move captured CO₂ from continental capture sites — Yara Sluiskil (Netherlands), Heidelberg Materials Brévik (Norway), Ørsted Asnæsværket (Denmark) and the Stockholm Exergi-Wacker / Heidelberg post-2027 follow-on volumes — into the Øygarden terminal in Norway and from there into the Aurora and Smeaheia injection complex. The award is the single sharpest procurement signal for the LCO₂ marine sector in 2026 to date and confirms Øygarden as the operational hub of the Northwest European CO₂ shipping logistics chain. Both K LINE and MISC will provide vessel operations from existing maritime hubs in Asia, with European port-call protocols anchored on Øygarden and on the continental loading points (Brevik, Eemshaven, Sluiskil).

NES SALES OPPORTUNITY

Northern Lights Second LCO₂ Carrier — Northwest European CO₂ Shipping Logistics Procurement

The second carrier procurement opens a six-month Tier 2/3 supplier window from delivery 2027 into commercial operation. NES suppliers in marine warranty surveying, port-call protocols, cargo handling, LCO₂ cryogenic instrumentation, ship integrity inspection, and onshore terminal interface engineering should engage Northern Lights JV (Stavanger/Bergen), K LINE (Tokyo), MISC (Kuala Lumpur), and the Øygarden terminal operator team. The Aberdeen Tier 2/3 entry-point is widest on marine warranty, ROV inspection, port-call protocols, and onshore terminal interface engineering, where North Sea oil-and-gas heritage applies directly.

The Øygarden terminal expansion procurement cycle now becomes a multi-year programme (phase 1 expansion already operational, phase 2 expansion FID in 2025, third LCO₂ carrier charter expected H2 2026 or early 2027).

OEUK Edinburgh CCS & Hydrogen Summit Outputs (1–2 June)

The OEUK North Sea CCS & Hydrogen Summit at the Edinburgh Sheraton Grand on 1–2 June delivered three substantive cross-basin engineering outputs. First, DNV published “An Integrated and Resilient North Sea”, commissioned by OEUK — a structural framework for joint UK-Norway-Netherlands-Denmark infrastructure planning that proposes shared CO₂ trunk lines, common LCO₂ vessel-port protocols, harmonised storage permits and aligned hydrogen-pipeline standards. Second, Xodus Group released “Enabling Infrastructure for Cross-Border CO₂ Transport”, scoping the shipping fleet, intermediate storage,

pipeline corridors and onshore terminal architecture needed to move stranded continental volumes (Polish, Czech, Slovak, Hungarian and German industrial CO₂) to North Sea storage. Third, the University of Aberdeen presented an offshore spatial-conflict paper addressing the operational interactions between CCS injection sites, hydrogen pipelines, fixed-bottom and floating wind arrays, and fisheries in the Central North Sea — a critical input for marine spatial planning under Net-Zero Industry Act implementation. The three outputs taken together move the cross-basin CO₂ architecture from concept to engineering scope and feed directly into the EU's Q3 2026 review of the 50 Mt/yr injection target.

NES SALES OPPORTUNITY

OEUK Edinburgh — Cross-Basin CO₂ Procurement Pipeline Now Engineering-Scope

The DNV and Xodus reports translate cross-basin CO₂ transport from policy to engineering scope. NES suppliers in pipeline integrity, subsea ROV inspection, marine warranty, terminal interface engineering, capture-side process engineering and shipping logistics should engage DNV (London/Oslo), Xodus (Aberdeen) and the operator teams (Northern Lights, Aramis, Porthos, Greensand) to position into the engineering studies that will flow from the reports through Q3–Q4 2026.

Project Greensand First Commercial Injection Imminent (June, Nini West)

Industry reporting (mining.com.au, multiple operators) confirmed during the week that Project Greensand will move to first commercial injection in the Nini West reservoir within June 2026. INEOS Energy and Wintershall Dea operate the project; initial injection rate 400 kt/yr scaling toward 8 Mt/yr by 2028 — the first full-cycle commercial offshore CO₂ injection in continental Europe. The Greensand first injection marks the operational milestone that the European Commission injection-target review of late May projected as imminent. Project Greensand operates from CO₂ captured at continental industrial sites, liquefied, shipped to the Danish North Sea via the Esbjerg coastal infrastructure, and injected into the Nini West reservoir.

NES SALES OPPORTUNITY

Project Greensand — First Commercial Injection Drives Aftermarket O&M

Once first injection is achieved, the project moves into a multi-year ramp from 400 kt/yr to 8 Mt/yr. NES suppliers in well intervention, injection-well integrity, downhole monitoring, ROV inspection, subsea pipeline integrity and CO₂-shipping marine warranty should engage INEOS Energy (Aberdeen) and Wintershall Dea (Kassel/Stavanger) procurement now. The Aberdeen INEOS office is the primary Tier 2/3 access point.

5. Marine Energy

Ocean Energy Europe issued its OPEN SEA demonstrator call during the week, with applications open until 10 July 2026 and €25k support per accepted demonstrator. The SEM-REV grid-connected test site at Île d'Yeu (France) is the principal supported facility. European Maritime Spatial Planning Week ran in Brussels during the same week (1–5 June) bringing together regulators, developers and supply-chain participants. The annual International Conference on Ocean Energy (ICOE 2027) was confirmed for The Hague during the maritime spatial planning week. The marine energy sector therefore continues the operational pattern of recent quarters: Horizon Europe demonstrator funding and Member State test-site access on the supply

side, with commercial offtake still pre-FID across the major technology developers (CorPower Ocean, AW-Energy, Mocean Energy, Floatgen variants).

NES SALES OPPORTUNITY

OPEN SEA Demonstrator Call — Marine Test-Site Engineering Procurement

NES suppliers in marine engineering, hydrodynamic modelling, mooring, test-site operation and umbilical inspection should target both the OPEN SEA demonstrator call (deadline 10 July 2026) and the SEM-REV test-site operator team via Ocean Energy Europe (Brussels). The ICOE 2027 confirmation for The Hague provides an additional 12-month positioning window.

6. Hydropower

A quiet week for European hydropower commercial announcements. Italian, Austrian, Swiss, Bulgarian and Iberian operators continue position-building ahead of the September 2026 CEF Energy call. Bulgaria's ten newly identified pumped storage sites remain the most immediate continental procurement geography. With the EU Energy Council's geothermal push (1 June) and the EGEC Brussels summit (4 June) drawing supply-chain attention this week, the pumped-storage and deep-well drilling supply-chain narrative is increasingly anchored on the Upper Rhine corridor (Vulcan Lionheart) and on the Carpathian basin. Hydropower-focused NES suppliers should treat the September CEF Energy call as the principal European positioning window.

7. Geothermal

EU Energy Council Launches Geothermal Push — European Geothermal Alliance Proposed (1 June)

On 1 June the Council of the EU adopted conclusions on “accelerating geothermal deployment”, formally naming geothermal as a strategic technology under the Net-Zero Industry Act and proposing a European Geothermal Alliance to coordinate Member State actions on permitting reform, drilling de-risking instruments, district-heating offtake and grid integration. The Council conclusions were tabled on the same day that the European Geothermal Energy Council (EGEC) finalised the agenda for its annual Brussels Summit (4 June). The combined timing produces the strongest structural geothermal moment in EU energy policy in a decade. For supply-chain participants the operational consequence is the formal European Commission engagement with a multi-decade geothermal investment programme, which will mobilise both InvestEU and EIB project finance into commercial geothermal-and-derivatives projects through 2030–2035.

Vulcan Energy Lionheart Moves to Execution Mode — Total Project Capex \$3.9bn (2–3 June)

Vulcan Energy Resources confirmed during the week that the Lionheart Project has transitioned formally into “execution mode”, with updated total project capex of \$3.9 billion (the €2.2 billion Lionheart funding close of the previous week plus parent costs and Phase 2 pre-feasibility allocation). Key engineering progress: well LSC-1 is flowing at 105–125 litres/second, well LSC-2 has reached its 3,000 m target depth, and a second drilling rig sourced from Vercana is being commissioned for second-half 2026 deployment. Vulcan also confirmed: Phase 2 pre-feasibility study to be completed H2 2026; Frankfurt Industriepark Höchst lithium electrolysis plant on track for first output 2028; Phase 1 first commercial lithium hydroxide

production unchanged at 2027. The execution-mode commercial signal is the single sharpest geothermal/lithium procurement signal in 2026 to date.

NES SALES OPPORTUNITY

Vulcan Lionheart Execution — Drilling, ORC, Brine Handling and Frankfurt Electrolysis Procurement

With Lionheart in execution mode and Vercana sourcing a second rig for H2 2026, NES suppliers in deep-well drilling, downhole tools, well integrity, brine handling, geothermal ORC, lithium DLE, and Frankfurt Industriepark Höchst electrolysis-side procurement should engage Vulcan Energy (Karlsruhe), Vercana (drilling), KfW and EIB lender procurement immediately. The Phase 2 pre-feasibility study H2 2026 is the next major procurement decision-window, alongside the Frankfurt electrolysis plant tendering activity for 2028 commissioning.

Aberdeen deep-well drilling and HPHT well-integrity heritage transfers directly; 3,500–5,000m target depths and high-temperature brine handling map onto NES capability developed for HPHT NCS wells.

Eavor Wins Overall CleanTech Innovation of the Year, 2026 CleanTech Breakthrough Awards (5 June)

Eavor Technologies (Munich/Calgary) was named Overall CleanTech Innovation of the Year at the 2026 CleanTech Breakthrough Awards on 5 June. The award recognises the Eavor-Loop closed-loop architecture and the operational performance of the flagship Geretsried project in Germany, which is supplying district heat and grid power. Eavor's global project pipeline includes additional German sites, the New Mexico project and Japanese partnerships announced in 2024–2025. The CleanTech award arrives one day after the EREC Brussels Summit and confirms Eavor as the most commercially-mature European closed-loop geothermal technology provider.

NES SALES OPPORTUNITY

Eavor — Geretsried O&M and Pipeline Procurement Cycle

With Geretsried operational and pipeline sites in advanced engineering, NES suppliers in well integrity, downhole tools, ROV inspection, brine handling, ORC, district-heating-interface engineering and surface-plant procurement should engage Eavor (Munich/Calgary). The Geretsried site is the principal European reference asset and provides an O&M procurement entry-point now.

European Geothermal Summit Brussels (4 June) — Annual Industry Assembly Convened

EGEC convened the European Geothermal Summit in Brussels on 4 June with Vulcan Energy Resources, Cindrigo Holdings, Eavor Technologies, GEL, Turboden, Geothermal Anywhere and EnBW geothermal procurement teams all in attendance. The summit followed the Council conclusions of 1 June and confirmed the European Geothermal Alliance proposal as a near-term policy priority. Commercial conversations centred on the Upper Rhine drilling supply chain (Vulcan), French Soultz-sous-Forêts redevelopment options, the Pannonian Basin pipeline (Geothermal Anywhere) and the Italian Larderello cluster operational programme.

8. Decommissioning & Norwegian Continental Shelf

A quiet week for new NCS contract awards following the high-tempo week to 30 May (Subsea7 Goliat Gas Export, DeepOcean Visund/Isflak satellite tieback to Johan Castberg). The Norwegian Offshore Directorate

(Sokkeldirektoratet) factpages and news flow confirm continued drilling permit issuance through the week (Aker BP 15/6-17 well drilling continues per the late-May permit). The execution-phase procurement loading following last week's awards is now flowing through Subsea7 Westhill (Aberdeen) and DeepOcean Haugesund engineering offices, with Q3 2026 onwards being the principal Tier 2/3 absorption window.

NES SALES OPPORTUNITY

NCS — Q3 2026 Procurement Loading from Subsea7 Westhill and DeepOcean Haugesund

NES Tier 2/3 suppliers should focus the next 30 days on engaging Subsea7 (Westhill, Aberdeen) and DeepOcean (Haugesund/Westhill) framework procurement teams to position into the work scope flowing from the late-May contract awards. Vår Energi (Stavanger), Equinor (Stavanger) and Aker BP (Lørenskog) are the Tier 2 operator engagement targets.

9. Industry & Policy

European Commission June Infringements Package — Enforcement-Mode Climate Delivery (4 June)

The European Commission published its June 2026 infringements package on 4 June with several material energy-sector decisions: Hungary and Romania were referred to the Court of Justice for non-implementation of the Energy Efficiency Directive recast; Spain and Poland received reasoned opinions on ETS Directive compliance covering aviation and maritime allowance allocation; further procedures opened against Austria, Bulgaria and Slovakia on Renewable Energy Directive III transposition. The combined package confirms the European Commission's shift from rule-setting to enforcement-mode delivery of the 2030 climate package and is the strongest enforcement signal sent to Member States in the 2026 calendar year. For continental energy investors the package is the clearest evidence yet that the 2030 deadline is binding rather than aspirational.

NES SALES OPPORTUNITY

EU Enforcement Mode — Continental Compliance Spend Absorption

NES suppliers with capability in energy-efficiency engineering, ETS compliance services, RED III transposition support and Member State-facing compliance consulting should engage Hungarian (MEKH), Romanian (ANRE), Spanish (CNMC), Polish (URE), Austrian (E-Control), Bulgarian (EWRC) and Slovak (URSO) regulator-facing project teams during H2 2026 as compliance remediation programmes activate.

PKEE Regulatory Monitoring (25–31 May): Spanish €9bn Capacity Mechanism Approved, ETS Reform, Electrification Action Plan Postponed

The PKEE Brussels regulatory monitoring report for the week of 25–31 May confirms three further structural items. First, the European Commission approved Spain's €9bn capacity mechanism under State-aid rules, the largest capacity-market approval of 2026 to date. Second, the ETS reform debate continues in Council with a structured July 2026 review window expected; the Electrolysers for Europe coalition position paper of 27 May continues to feed into the debate. Third, the European Commission's Electrification Action Plan has been formally postponed to a release date of 22 July 2026. Fourth, the European Nuclear Safety Regulators Group (ENSREG) launched a Fusion Safety Task Force, signalling the European entry of fusion regulation into the formal regulatory framework. The combined picture:

continental energy policy is now operating at the highest tempo of regulatory activity of any quarter since 2024.

Capacitypedia Launched at 12th Energy Infrastructure Forum Copenhagen (Week of 1 June)

ENTSO-E and the EU DSO Entity launched “Capacitypedia” at the 12th Energy Infrastructure Forum in Copenhagen during the week, providing a structured public database of European TSO and DSO capacity-development data. Capacitypedia is the first single source for continental network-capacity intelligence and resolves a long-standing supplier-side data gap for grid procurement planning. For NES suppliers in HV cable, switchgear, transformer service and substation construction, Capacitypedia provides the primary market-intelligence input for the post-2026 European grid investment cycle.

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	Northern Lights second LCO ₂ carrier — marine warranty & terminal interface	CCUS Shipping	Northern Lights JV, K LINE, MISC, Øygarden terminal	Vessel delivery late 2027; pre-qual now	HIGH
2	OEUK Edinburgh DNV/Xodus cross-border CO ₂ reports — engineering studies follow-up	CCUS	DNV, Xodus (Aberdeen), N. Lights, Aramis, Porthos, Greensand	Q3–Q4 2026	HIGH
3	EU geothermal push + EGEN Brussels follow-up	Geothermal	EU Council, EGEN, Vulcan, Cindrigo, Eavor, GEL, Turboden	Q3 2026 onwards	HIGH
4	Vulcan Lionheart execution-mode procurement (\$3.9bn total)	Geothermal	Vulcan Energy, Vercana, KfW, EIB, MAN Energy Solutions	2026–2028 multi-year	HIGH
5	Project Greensand first commercial injection (Nini West)	CCUS	INEOS Energy (Aberdeen), Wintershall Dea	June 2026 (imminent)	HIGH
6	Air Liquide-TotalEnergies Rotterdam-Antwerp-Zeeland H ₂ cluster	Hydrogen	Air Liquide, TotalEnergies, Siemens Energy, Bilfinger, Stork	2026–2029 multi-asset	HIGH
7	Eavor Geretsried O&M and global pipeline procurement	Geothermal	Eavor (Munich/Calgary)	2026–2027	MEDIUM
8	French AO10 / Gulf of Lion 10 GW floating — 13-consortium pre-qual	Floating Wind	13 consortia incl. RWE-BOURBON, Shell-EnBW, Equinor-Océole	Awards late 2026/early 2027	MEDIUM
9	Everfuel Project Frigg €244.9m EU H ₂ Bank support	Hydrogen	Everfuel (Herning), Danish Energy Agency, Energinet	2026–2028	MEDIUM
10	TotalEnergies-RWE Centre Manche 2 BoP prequalification continuing	Fixed-Bottom Wind	TotalEnergies (Paris), RWE (Essen/Hamburg), Eiffage, Bouygues	FID early 2029; pre-qual now	LOW-MED

Market Context for North East Scotland

Two pan-European industry assemblies during the week to 6 June delivered concrete supply-chain output: the OEUK CCS & Hydrogen Summit in Edinburgh (1–2 June) and the European Geothermal Summit (EGEC) in Brussels (4 June). The OEUK summit produced three substantive deliverables — the DNV “Integrated

and Resilient North Sea” infrastructure framework, the Xodus cross-border CO₂ transport study, and the University of Aberdeen offshore spatial-conflict paper — that together translate continental CO₂ transport from concept to engineering scope. The EGEN summit convened on the same day as EU Energy Council conclusions formally launching a European Geothermal Alliance under the Net-Zero Industry Act. Two summit events delivering structural sectoral outputs in the same week is highly unusual and produces an unusually strong combined market intelligence signal for NES Tier 2/3 suppliers.

The two principal commercial signals of the week were the Northern Lights second LCO₂ carrier charter (3 June, K LINE / MISC) and Vulcan Energy’s execution-mode confirmation of Lionheart at \$3.9bn total project capex (2–3 June). The Northern Lights signal doubles the dedicated CO₂ shipping fleet and confirms Øygarden as the operational hub of Northwest European CO₂ shipping logistics; the Vulcan signal confirms the largest single European geothermal procurement programme in Europe is now live with two wells drilled, a second rig being commissioned and a Phase 2 pre-feasibility study following H2 2026. Both signals carry direct Aberdeen Tier 2/3 capability-transfer implications: HPHT well drilling and integrity engineering map onto Vulcan; marine warranty, ROV inspection, port-call protocols, terminal interface engineering and LCO₂ cryogenic instrumentation map onto Northern Lights. Project Greensand’s imminent first commercial injection in June (INEOS-Wintershall, Nini West) provides the third commercial CO₂ milestone of the week and the trigger for INEOS-Aberdeen aftermarket O&M procurement.

The week’s broader signals reinforce the cross-basin pattern: Air Liquide-TotalEnergies expanded the Rotterdam-Antwerp-Zeeland hydrogen cluster from a single ELYgator project to a multi-asset platform with a new 250 MW Zeeland JV (FEED H2 2026, operation 2029); Everfuel secured €244.9m EU H₂ Bank support for Project Frigg; Ocean Winds delivered first 30 MW from the French Mediterranean floating cluster; the French AO10 10 GW Mediterranean tender confirmed 13 candidates including continental Tier 1 consortia (RWE-BOURBON, Shell-EnBW, Equinor-Océole); Ecowende installed first turbine at the 760 MW Dutch HKW VI project; the European Commission’s June infringements package signalled enforcement-mode delivery of the 2030 climate package. The single most important NES action over the next 14 days is engagement with the OEUK Edinburgh and EGEN Brussels follow-up programmes — specifically DNV and Xodus engineering studies, the European Geothermal Alliance design discussions, the Northern Lights / Øygarden terminal engineering scope, and the Vulcan Phase 2 pre-feasibility supplier preparation.

Sources Used

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

- Northern Lights expands LCO₂ fleet — second vessel charter with K LINE / MISC (3 June) — Offshore Engineer Digital — <https://www.oedigital.com/news/539895-northern-lights-expands-lco2-fleet-with-vessel-charter-for-misc-k-line>
- MISC bags second LCO₂ carrier charter from Northern Lights (4 June) — The Star — <https://www.thestar.com.my/business/business-news/2026/06/04/misc-bags-second-lco2-carrier-charter-from-northern-lights>
- Northern Lights JV newsroom — <https://norlights.com/newsroom/>
- OEUK CCS & Hydrogen Summit — DNV “Integrated and Resilient North Sea” (1–2 June) — Key Facts Energy — <https://keyfactsenergy.com/news/35815/view/>
- University of Aberdeen offshore spatial conflicts paper (OEUK summit, 2 June) — <https://www.abdn.ac.uk/news/25655/>

- University of Aberdeen / OEUK summit coverage — Key Facts Energy — <https://www.keyfactsenergy.com/news/35816/view/>
- EU energy ministers launch geothermal energy push (1 June) — Balkan Green Energy News — <https://balkangreenenergynews.com/eu-energy-ministers-launch-geothermal-energy-push/>
- European Geothermal Summit 2026 — EGEC (Brussels, 4 June) — <https://www.egec.org/events/european-geothermal-summit-2026/>
- Vulcan Lionheart shifts to execution mode — \$2.2bn funding (2 June) — Ad-hoc-News — <https://www.ad-hoc-news.de/boerse/news/ueberblick/vulcan-energy-s-lionheart-shifts-to-execution-mode-as-2-2-billion/69463260>
- Vulcan Energy shores up board and funding as Lionheart eyes execution (2 June) — Ad-hoc-News — <https://www.ad-hoc-news.de/boerse/news/ueberblick/vulcan-energy-shores-up-board-and-funding-as-lionheart-project-eyes/69465397>
- Vulcan Energy Lionheart funding closes a chapter — hard part next (Ad-hoc-News) — <https://www.ad-hoc-news.de/boerse/news/ueberblick/vulcan-energy-s-lionheart-funding-closes-a-chapter-but-the-hard-part-has/69455946>
- Eavor wins Overall CleanTech Innovation of the Year, 2026 CleanTech Breakthrough Awards (5 June) — <https://indovizka.com/news/detail/20522/eavor-wins-overall-cleantech-innovation-of-the-year-in-2026-cleantech-breakthrough-awards-program>
- Europe gets closer to 2030 emissions injection target — Greensand June first injection (mining.com.au) — <https://mining.com.au/europe-gets-closer-to-2030-emissions-injection-target/>
- TotalEnergies files authorization for 1.5 GW Centre Manche 2 (1 June) — Construction Front — <https://constructionfront.com/2026-06-01-totalenergies-files-authorization-for-1-5gw-centre-manche-offshore-wind-project-in-france/>
- TotalEnergies Centre Manche 2 — RWE consortium partner confirmed (Yahoo Finance) — <https://finance.yahoo.com/sectors/energy/articles/totalenergies-pushes-france-mega-wind-123310321.html>
- Ecowende installs first turbine at 760 MW Hollandse Kust West VI — Windtech International — <https://www.windtech-international.com/projects-and-contracts/project-and-contracts/blog>
- European Energy sells Dutch wind portfolio to Westra (3 June) — Windtech International — <https://www.windtech-international.com/projects-and-contracts/european-energy-sells-dutch-wind-portfolio-to-westra>
- Ocean Winds delivers 30 MW from Gulf of Lion floating cluster (1 June) — Click Petroleo e Gas — <https://en.clickpetroleoegas.com.br/in-the-french-mediterranean-turbines-that-float-on-the-sea-instead-of-being-anchored-to-the-seabed-have-started-delivering-energy-to-homes-a-davila/>
- French AO10 / Gulf of Lion 10 GW floating — 13 candidates pre-selected (zurbains.com) — <https://www.zurbains.com/environnement/energies-propres/parcs-eoliens-en-mediterranee-golfe-du-lion-en-2030-la-selection-des-candidats.html>
- Occitanie Mediterranean industrial-hub plan — Hérault Tribune — <https://echo-des-tribunes.com/herault-tribune/articles/eolien-flottant-occitanie-veut-construire-toute-la-filiere-pour-devenir-le-hub-industriel-de-la-mediterranee>
- Hydrogen Council CEO Forum: capacity to double in 2026 (5 June) — S&P Global — <https://www.spglobal.com/energy/en/news-research/latest-news/energy-transition/060426-hydrogen-moves-from-blueprints-to-reality-as-capacity-set-to-double-hydrogen-council>
- Everfuel €244.9m EU H₂ Bank support for Project Frigg (1 June) — LinkedIn / Global Hydrogen Review — https://www.linkedin.com/posts/globalhydrogenreview_everfuel-receives-green-hydrogen-project-activity-7467223475821371392-8iuD

- Germany Hydrogen Support Fund gets EU State-aid approval (2 June) — Industrial Info Resources — <https://www.industrialinfo.com/iirenergy/industry-news/article/germanys-hydrogen-support-fund-gets-eu-approval--358273>
- EU June 2026 infringements package — key energy decisions (4 June) — European Commission — https://energy.ec.europa.eu/news/june-infringements-package-key-decisions-energy-2026-06-04_en
- Norwegian Offshore Directorate (Sokkeldirektoratet) news & permits — <https://www.sodir.no/en/>

Europe Offshore Low-Carbon Intelligence Briefing · Week Ending 6 June 2026 · Prepared by ExportCentral AI for North East Scotland energy supply chain companies