

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 4 July 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

IN THIS WEEK'S BRIEFING

Coverage: 28 June – 4 July 2026. Sectors: offshore wind (fixed-bottom & floating), hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning, grid & policy.

Headline Signals — Week Ending 4 July 2026

- Norway awards 1.5 GW Utsira Nord floating wind to the Equinor / RWE / Parkwind consortium — the world's largest single-consortium floating wind development to date; 150 Hywind spar-buoy turbines, 200–300 m water depth, 280 km export cable, powering 1.1 million Norwegian homes.
- Vattenfall installs the first monopile at Nordlicht I in the German North Sea on 1 July — Germany's largest offshore wind project at 980 MW (Nordlicht 1) plus 630 MW (Nordlicht 2 starts 2027); DEME installs 68 Nordlicht 1 monopiles up to 80.5 m long and 1,290 tonnes each, full operation 2028, 6 TWh/yr.
- Transocean and Equinor sign a \$1bn+ package for three harsh-environment Cat D semisubmersibles (Enabler, Encourage, Endurance) at ~\$399k/day for a combined seven rig-years starting Q2 2027 — the largest single Cat D re-contracting package on the NCS of 2026 to date.
- Vår Energi and Equinor execute a Peon-for-Fram/Mulder/Grosbeak asset swap on 30 June: Vår Energi acquires 32.5% of the Peon gas discovery (105–195 MMboe) for tieback to the Gjøa hub extending economic life to 2045; Equinor takes 5% of Fram plus Mulder, Grosbeak and Groenngylt stakes to strengthen its Troll and Fram cluster.
- Norwegian offshore workers reach a 5.2% wage deal on 2 July averting a floating production platform strike, but the parallel Norwegian oil-service lockout from 27 June halts ~1,000 workers across four mobile rigs, five fixed installations and one intervention vessel — 12,000 boepd impact in the first week and up to 120,000 boepd exposure if the lockout persists.
- Greece Energean signs the installation permit for the Prinos CCS offshore platform — a €1bn+ project and the first Southeast European CO2 storage hub, works from October; Shell receives its Aramis K14-FA/FC CO2 storage permit and the Delta Rhine Corridor CO2 pipeline MoU is signed by EBN, Eni NL CCUS, Gasunie, OGE, Shell and TotalEnergies EP NL.
- Iberdrola and BP secure a €211m (\$240m) IPCEI Hy2USE reallocation for the Castellón green hydrogen expansion in Spain (25 MW phase-one construction complete); OMV secures €123m of subsidies for a 140 MW green hydrogen plant at Bruck an der Leitha, Austria; Plug Power secures a 275 MW electrolyzer contract plus a 5 MW GenEco PEM installation in Denmark.

- Nel ASA takes FID on a 1 GW next-generation pressurised alkaline production line at Herøya, Norway (operations 2027); Metacon secures SEK 111m of Klimatklivet funding for a 10 MW electrolysis facility outside Uppsala; Cavendish Hydrogen (Oslo) is awarded €1.3m from the EU CETPartnership HyMEGA compression project.
- Denmark–Germany advance the €1.3bn IPCEI-backed “Syvtallet” 210 km hydrogen pipeline from western Jutland to Ellund with Energinet targeting FID in 2027 and operations from 2030; Germany opens a €220m call for hydrogen refuelling stations and heavy-duty vehicles with 526 applications received by 2 July.
- EU Council adopts its position on the Grids Package (26 June) with a tripartite storage agreement across 22 member states committing 30–35 GW of new capacity 2026–2028 and a 45 GW annual deployment target to reach 200 GW by 2030; Commissioner Hoekstra convenes the CCS Implementation Dialogue on 2 July anchored on the EU 50 Mt/yr CO₂ injection target for 2030.

1. Offshore Wind — Fixed Bottom

Vattenfall Installs First Monopile at Nordlicht I — Germany’s Largest Offshore Wind Project (1 July)

On 1 July Vattenfall confirmed installation of the first monopile at Nordlicht I in the German North Sea. Nordlicht I is Germany’s largest offshore wind project at 980 MW, with Nordlicht 2 (630 MW) planned for installation start in 2027. DEME is contracted to install a total of 68 monopiles for Nordlicht 1, each up to 80.5 metres long and weighing up to 1,290 tonnes. Full commercial operation of the combined 1.6 GW Nordlicht I plus II cluster is targeted for 2028 with expected annual generation of approximately 6 TWh. The Nordlicht monopile installation is the most consequential German fixed-bottom T&I execution event of Q3 2026 to date, and consolidates DEME’s position as the principal Tier 1 European monopile installation contractor alongside its parallel jacket-foundation completion at Ocean Winds’ Dieppe Le Tréport project off the French coast.

NES SALES OPPORTUNITY

Nordlicht I — Active German Monopile T&I Reference Project Now Open

NES Tier 2/3 suppliers in secondary steel, boat landings, J-tubes, transition-piece internals, scour protection, cable protection systems, marine warranty, environmental monitoring and turbine-installation crew management should engage Vattenfall (Berlin / Hamburg), DEME (Antwerp) and the Nordlicht EPC framework contractors during Q3–Q4 2026. The 68-monopile / 1,290-tonne / 80.5 m installation programme is the principal German fixed-bottom T&I reference of the campaign year.

Ocean Winds Installs First Turbine at Dieppe Le Tréport 500 MW — DEME Completes Jacket Foundations (26 June)

On 26 June Ocean Winds confirmed installation of the first turbine at the 500 MW Dieppe Le Tréport offshore wind farm off the Normandy coast. In parallel DEME confirmed completion of all jacket foundation installation for the project. Dieppe Le Tréport is one of the largest French offshore wind farms in execution phase and is the principal French offshore wind T&I execution event of late June 2026. The Ocean Winds turbine-installation programme uses the Cadeler vessel-based logistics framework and NKT dynamic cable supply chain. The Dieppe Le Tréport campaign is now the most advanced commercial-scale

French offshore wind installation programme and provides the structural anchor for the parallel French AO9 / AO10 procurement pipeline.

JERA Nex bp Acquires Sumitomo Stakes in Nobelwind and Northwester 2 (Belgian North Sea, 3 July)

On 3 July JERA Nex bp confirmed the acquisition of Sumitomo's stakes in the Belgian Nobelwind and Northwester 2 offshore wind farms. Nobelwind (165 MW, commissioned 2017) and Northwester 2 (219 MW, commissioned 2020) are both operational and located in the Belgian sector of the North Sea. The acquisition consolidates JERA Nex bp's position as one of the principal operational-phase Belgian offshore wind portfolio holders and signals continued Japanese capital repositioning around European operational assets, coordinated with the wider Japanese strategic retrenchment on international wind investment. The transaction complements JERA Nex bp's existing European offshore wind portfolio and is the principal Belgian offshore wind M&A event of Q3 2026 to date.

Skyborn Renewables Takes Full Ownership of 111 MW Nordergründe Offshore Wind Farm, Germany (29 June)

On 29 June Skyborn Renewables confirmed it has taken full ownership of the 111 MW Nordergründe offshore wind farm in the German North Sea. Nordergründe (commissioned 2017) is an operational asset in the German sector of the North Sea. The acquisition consolidates Skyborn's continental operational portfolio alongside its parallel Gennaker corporate-PPA programme (600 MW Amazon PPA plus 100 MW Uniper PPA signed the previous week). Skyborn is now positioned as one of the principal German operational-phase and commercial-development-phase offshore wind portfolio holders and the structural counterparty for European corporate hyperscaler offshore PPA architecture through 2026–2028.

Germany BNetzA Awards 2.5 GW Onshore Wind and 0.5 GW Solar-Plus-Storage (29 June)

On 29 June the German Federal Network Agency (Bundesnetzagentur, BNetzA) confirmed the award of 2.5 GW of onshore wind capacity and 0.5 GW of solar-plus-storage capacity in the latest auction round. The German onshore wind award follows the parallel Bundesnetzagentur May 1 2026 auction result of 2.499 GW published the previous week and confirms continued auction-mode execution against the German EEG framework despite the parallel EEG 2027 reform and Netzpaket slip to July. Nordex separately confirmed new orders totalling more than 197 MW in Germany from ENOVA and BMR, plus a 112 MW order in Germany and a 392 MW Romania project advancement.

Germany Floats New Tender for 2.52 GW Onshore Wind — Bids Due 3 August

Germany has now floated a new tender for 2.52 GW of onshore wind projects with bids due 3 August. The tender is the principal German onshore wind procurement event of Q3 2026 and consolidates the German auction pipeline against the broader EEG framework. The parallel German solar-plus-storage 0.5 GW award confirms the structural pattern of continued German auction-mode execution alongside the parallel offshore wind procurement reset (Nordlicht I monopile installation, Nordseecluster A cable completion, Gennaker corporate PPAs, IJmuiden Ver Gamma A/B FINAL tender terms). The tender close of 3 August 2026 is the immediate priority procurement milestone for German onshore wind supply-chain engagement.

DNV Publishes Updated DNV-RP-0585 Seismic Design Guidance for Wind Power Plants (2 July)

On 2 July DNV published an updated version of DNV-RP-0585, the recommended practice for seismic design of wind power plants in earthquake-prone regions. The updated recommended practice reflects

the growing pipeline of European offshore and onshore wind development in seismic-active regions including the Aegean, the Adriatic, Italy, Greece and southern France. The publication is consistent with the broader continental grid-and-seismic-resilience procurement priority signalled by the parallel ENTSO-E final expert panel report on the 4 July 2025 Czech Republic grid incident (released the previous week). The updated DNV-RP-0585 is now the principal continental seismic design reference for European wind power procurement engineering.

2. Offshore Wind — Floating

Norway Awards 1.5 GW Utsira Nord Floating Wind to Equinor / RWE / Parkwind Consortium — World's Largest Single-Consortium Floating Wind Development

Norway has formally awarded the 1.5 GW Utsira Nord floating offshore wind area to a consortium of Equinor, RWE and Parkwind. The award is the world's largest single-consortium floating offshore wind development to date. The Utsira Nord development is planned as 150 Hywind spar-buoy turbines in water depths of 200–300 metres, with a 280 km subsea export cable connecting to the Norwegian onshore grid. Expected annual generation is sufficient to power the equivalent of 1.1 million Norwegian homes. The award follows the Storting subsidy vote of 9 June, the NVE consultation window that closed on 18 June, and the external quality-assurance exercise that ran through the second half of June. Utsira Nord is now the principal European floating offshore wind commercial reference and the structural anchor of the Nkr35bn Norwegian floating wind state-support programme through the 2030–2033 commissioning window.

NES SALES OPPORTUNITY

Utsira Nord 1.5 GW — 150-Turbine Hywind Spar-Buoy Engineering Procurement Window

NES Tier 2/3 suppliers in deep-water dynamic mooring, chain and synthetic tethers, drag-embedment anchors, dynamic cabling, subsea connectors, spar-buoy fabrication (steel and concrete alternatives), heavy-lift installation, marine warranty and Hywind topside integration should engage Equinor (Stavanger), RWE (Essen) and Parkwind (Leuven / Antwerp) procurement teams during H2 2026 and 2027. The 150-turbine spar-buoy programme is now the largest single continental floating wind engineering procurement opportunity of the decade.

EDP Renováveis Updates Floating Offshore Wind Pipeline via Ocean Winds JV with ENGIE

EDP Renováveis confirmed an update to its floating offshore wind pipeline via its Ocean Winds joint venture with ENGIE (Ad-hoc-News coverage). The pipeline update is consistent with the broader European floating wind portfolio expansion of Q3 2026 and complements the parallel Norwegian Utsira Nord award and the ongoing French AO10 procurement pipeline. Ocean Winds continues to be positioned as one of the principal European floating wind portfolio holders and the structural counterparty for European floating offshore wind procurement engagement through 2027–2030.

Equinor Confirms Japan Wind Exit by End-2026 — Tokyo Office Closure Ongoing

Equinor confirmed continued execution of its Japan offshore wind exit programme with the Tokyo office closure ongoing and completion targeted for end-2026 (Yahoo Finance and MarketScreener coverage carrying over from previous-week reporting). The Japan exit and the parallel dropping of Equinor's 2030 installed capacity target signal continued Norwegian capital recycling from international wind exposure

back into the Utsira Nord floating wind consortium, the Peon gas discovery tieback to the Gjøa hub, the Troll TWIN commitment, Johan Sverdrup Phase 4 (Tonjer + Geitungen) and the Wisting EIA. The Equinor strategic refocusing is now anchored on the combined NCS subsea engineering and Norwegian floating wind commercial-development pipeline.

3. Hydrogen

Iberdrola – BP Secure €211m IPCEI Hy2USE Reallocation for Castellón Hydrogen Expansion (Spain)

Iberdrola and BP confirmed during the week that Spain has authorised a €211m (\$240m) IPCEI Hy2USE reallocation for the Castellón green hydrogen hub expansion. The initial phase-one 25 MW electrolyser facility at the Castellón refinery is now construction-complete, and the reallocated IPCEI Hy2USE funding underwrites the phase-two capacity expansion. The Castellón hub is one of the largest Spanish green hydrogen commercial-scale projects and the principal Iberian anchor for the wider European Hydrogen Bank supply pipeline. The €211m reallocation confirms continued Spanish and European commercial-scale commitment to refinery-integrated green hydrogen production alongside Shell REFHYNE II (100 MW PEM at Rheinland, FID 24 June from the previous week) and OMV Petrom (20 MW delivery at Petrobrazî, Romania).

NES SALES OPPORTUNITY

Castellón Phase-Two Hydrogen Expansion — €211m IPCEI Reallocation Procurement Window

NES Tier 2/3 suppliers in process engineering, electrolyser stack support, balance-of-plant, hydrogen compression, RFNBO certification and refinery integration should engage Iberdrola (Bilbao / Madrid), BP (London / Castellón) and the Spanish IPCEI Hy2USE programme. Phase-two expansion procurement opens immediately alongside continued Shell REFHYNE II engagement.

OMV Secures €123m Subsidies for 140 MW Green Hydrogen Plant at Bruck an der Leitha, Austria

OMV confirmed €123m of subsidies for a 140 MW green hydrogen plant at Bruck an der Leitha in Austria (Ad-hoc-News coverage). The Bruck an der Leitha project is the principal Austrian commercial-scale green hydrogen project of 2026 to date and consolidates continued central European commitment to refinery-integrated green hydrogen production. The 140 MW electrolyser scale positions the project as one of the largest single continental green hydrogen production units under commercial development and reinforces the structural pattern of European refinery-integrated hydrogen (Shell REFHYNE II 100 MW at Rheinland, Iberdrola / BP Castellón phase-two, OMV Petrom Petrobrazî 20 MW plus 35 MW second project in Romania).

Germany Advances Hydrogen Mobility — €220m Refuelling and Heavy-Duty Vehicle Funding Call (2 July, 526 Applications)

On 2 July Germany confirmed a €220m funding call for hydrogen refuelling stations and heavy-duty hydrogen vehicles. The call received 526 applications: 71 for hydrogen refuelling stations and 455 for heavy-duty hydrogen vehicles. The call is the principal German hydrogen mobility procurement event of 2026 to date and consolidates the German heavy-duty hydrogen refuelling-network build-out that underwrites downstream RFNBO demand for the Shell REFHYNE II, Iberdrola / BP Castellón and OMV Bruck an der Leitha production facilities. The German heavy-duty hydrogen refuelling network build-out is the principal European heavy-duty mobility procurement window of Q3 2026.

Plug Power Secures 275 MW Electrolyzer Contract and 5 MW GenEco PEM Installation in Denmark (30 June)

On 30 June Plug Power confirmed it has secured a 275 MW electrolyzer contract from a European industrial customer, plus completion of a 5 MW GenEco PEM installation in Denmark (Yahoo Finance coverage). The 275 MW contract is the largest single continental PEM electrolyzer contract for Plug Power of 2026 to date and consolidates Plug Power's European commercial-scale execution alongside the parallel Måde PtX facility 5 MW commissioning in Esbjerg from the previous week. The Danish GenEco PEM installation reinforces Denmark as the principal European PEM commercial-scale reference geography.

Nel ASA Takes FID on 1 GW Next-Generation Pressurised Alkaline Production Line at Herøya, Norway (Operations 2027)

Nel ASA confirmed FID on a 1 GW next-generation pressurised alkaline production line at Herøya in Norway, with operations targeted for 2027 (AskCyborg coverage). The Herøya production line is Nel ASA's largest single manufacturing FID of 2026 to date and consolidates Nel ASA's position as one of the principal continental alkaline electrolyser suppliers. The 1 GW pressurised alkaline commercial-scale capacity is the structural manufacturing complement to the parallel Plug Power 275 MW PEM contract and the Shell REFHYNE II 100 MW PEM FID, and confirms the Norwegian industrial-scale alkaline electrolyser manufacturing footprint.

Cavendish Hydrogen (Oslo) Awarded €1.3m from EU CETPartnership for HyMEGA Compression Project (29 June)

On 29 June Cavendish Hydrogen (Oslo) confirmed a €1.3m award from the EU CETPartnership for its HyMEGA hydrogen compression project (MFN coverage). The HyMEGA project targets next-generation hydrogen compression technology for European hydrogen infrastructure and complements the parallel European Commission TEN-E PCI/PMI call for hydrogen, electrolyser and CO2 projects that remains open through 30 September 2026. Cavendish Hydrogen is now positioned as one of the principal European hydrogen compression technology developers and a candidate supplier to the continental hydrogen pipeline architecture (Delta Rhine Corridor, AquaDuctus, Baltic Sea Hydrogen Collector, the Danish–German “Syvtallet” pipeline).

Metacon Secures SEK 111m Klimatklivet Funding for 10 MW Electrolysis Facility Outside Uppsala

Metacon confirmed SEK 111m of Swedish Klimatklivet funding for a 10 MW electrolysis facility outside Uppsala (Energy News coverage). The Uppsala facility is the principal Swedish commercial-scale hydrogen procurement event of 2026 to date and consolidates the parallel Swedish RFNBO commercial-scale pipeline (H2 Green Steel, Statkraft, Vattenfall Hybrit). The Klimatklivet award is consistent with the broader European Hydrogen Bank price trajectory and signals continued Swedish commercial commitment to green hydrogen production at scale.

Denmark – Germany Advance €1.3bn IPCEI-Backed “Syvtallet” 210 km Hydrogen Pipeline (FID 2027, Operations 2030)

Denmark and Germany advanced the €1.3bn IPCEI-backed “Syvtallet” 210 km hydrogen pipeline from western Jutland to the Ellund cross-border point (greenhydrogen.dk coverage). The Danish Transmission System Operator Energinet is targeting FID in 2027 and operations from 2030. Syvtallet is one of the principal cross-border European hydrogen pipeline projects and complements the parallel Delta Rhine Corridor, AquaDuctus and Baltic Sea Hydrogen Collector programmes. The IPCEI backing signals continued

German-Danish binding commercial commitment to a cross-border hydrogen transport backbone and consolidates the parallel Hy2gen Nordic Albatros, European Energy Måde and BioCirc Vesthimmerland Danish RFNBO pipeline.

NES SALES OPPORTUNITY

Syvtallet Cross-Border H2 Pipeline — €1.3bn IPCEI Engineering Procurement Window Now Open

NES Tier 2/3 suppliers in hydrogen pipeline engineering, compression, metering, hydrogen blending, HDPE and steel pipeline coatings, pipeline monitoring, hydrogen embrittlement testing, valve engineering and cross-border pipeline design should engage Energinet (Fredericia), the Danish Ministry of Climate and Energy, and the German BMWK for the Syvtallet 210 km procurement window between now and Energinet FID 2027.

Malta Secures Council Backing for Hydrogen-Ready Pipeline PCI Extension

Malta confirmed that EU member states have backed extended EU funding for its hydrogen-ready pipeline PCI project (The Journal MT coverage). The Malta hydrogen-ready pipeline is the principal southern Mediterranean hydrogen infrastructure PCI project and provides a structural complement to the wider European hydrogen backbone architecture. The Council backing consolidates continued European Commission commitment to southern Mediterranean hydrogen infrastructure alongside the Iberdrola / BP Castellón Spanish anchor and the OMV Bruck an der Leitha Austrian project.

European Commission TEN-E PCI/PMI Call Remains Open Until 30 September 2026 — Hydrogen, Electrolyser, CO2

The European Commission TEN-E Projects of Common Interest and Projects of Mutual Interest call for hydrogen, electrolyser and CO2 transport / storage projects (opened 25 June 2026 from the previous week) remains open until 30 September 2026. Successful projects will be added to the next PCI/PMI list expected for adoption in Q1 2027. The TEN-E call remains the principal continental hydrogen and CO2 infrastructure policy-engagement window of Q3 2026 and the structural anchor for the cross-border European hydrogen and CO2 pipeline architecture (Syvtallet, Delta Rhine Corridor, AquaDuctus, Baltic Sea Hydrogen Collector, Malta hydrogen-ready pipeline).

4. CCUS — Carbon Capture, Use & Storage

Greece Energean Signs Prinos CCS Installation Permit — First Southeast European CO2 Storage Hub, Works from October

On 2 July Greece's Energean and EnEarth signed the installation permit for the Prinos CCS offshore platform. The Prinos CCS project is a €1bn+ development and is the first Southeast European CO2 storage hub. Works will begin from October 2026. Prinos will use depleted offshore hydrocarbon reservoirs in the Aegean Sea for CO2 injection and storage, and the project is now positioned as the principal Southeast European CCUS commercial-scale reference. The installation permit signature is the most consequential Southeast European CCUS event of 2026 to date and complements the parallel Aramis (Netherlands), Northern Lights (Norway), Ravenna (Italy) and Prinos (Greece) commercial-scale European CCS storage build-out.

NES SALES OPPORTUNITY

Prinos CCS — €1bn+ Southeast European CO2 Storage Hub Installation Procurement Window (Works from October)

NES Tier 2/3 suppliers in offshore platform installation, subsea pipeline engineering, CO2 injection wells, well integrity testing, marine warranty, environmental monitoring, ISO 27914 CCS design and ISO 27915 operational engineering should engage Energean (Athens / London), EnEarth (Athens) and Greek Ministry of Environment and Energy procurement teams. Installation works begin October 2026 and open a multi-year commercial-scale engineering procurement window through 2030.

Aramis — Shell Receives CO2 Storage Permit for K14-FA and K14-FC Depleted Gas Fields; Delta Rhine Corridor CO2 Pipeline MoU Signed

Shell received its CO2 storage permit for the K14-FA and K14-FC depleted gas fields as part of the Aramis project (IFRF coverage). In parallel, EBN, Eni NL CCUS, Gasunie, OGE, Shell and TotalEnergies EP NL signed the Memorandum of Understanding for the Delta Rhine Corridor CO2 pipeline. The Delta Rhine Corridor is the principal cross-border European CO2 pipeline project connecting the Netherlands, Germany and the wider Rhine industrial cluster. The combined Aramis K14-FA / K14-FC storage permit and Delta Rhine Corridor MoU is the most consequential Dutch commercial-scale CCS storage event of 2026 to date and consolidates Aramis as the principal continental CCS storage anchor alongside Porthos (Rotterdam, operational start now slipped to 2027) and Northern Lights (Norway).

Ucaneo Opens Germany's Largest DAC Facility in Berlin — 150 t/yr CO2, First Verified DAC-Plus-Geological-Storage in Germany (2 July)

On 2 July Ucaneo opened Germany's largest Direct Air Capture facility in Berlin. The facility captures 150 tonnes of CO2 per year and is the first verified DAC-plus-geological-storage operation in Germany (chemeurope coverage). The Ucaneo Berlin DAC facility complements the parallel BioCirc Vesthimmerland biogas-CCS opening from the previous week (32,500 t/yr to INEOS Greensand) and consolidates the structural commercial maturation of the European negative-emissions value chain. Siemens is the principal industrial partner supporting Ucaneo's DAC scale-up.

Commissioner Hoekstra CCS Implementation Dialogue — EU 50 Mt/yr CO2 Injection Target for 2030 (2 July)

On 2 July European Commissioner for Climate Action Wopke Hoekstra convened the CCS Implementation Dialogue in Brussels (European Commission climate policy release). The Dialogue brought together industry, member states and the European Commission around the EU 50 Mt/yr CO2 injection capacity target for 2030. The Dialogue is the principal continental CCS policy-engagement event of Q3 2026 and the structural response to the CATF analysis from the previous week that the EU CO2 storage 2030 target will be missed by approximately 35% on current project execution trajectories. The Hoekstra CCS Implementation Dialogue is now the principal European Commission commercial-scale CCS delivery-gap policy vehicle.

CCSA Launches European CCUS National Associations Forum — 9 Organisations from 8 Countries (25 June)

On 25 June the Carbon Capture and Storage Association (CCSA) launched the European CCUS National Associations Forum in Brussels with nine organisations from eight countries (carboncredits.jp coverage). The Forum is the principal continental industry-body coordination mechanism for European commercial-

scale CCS operations and complements the parallel European Commission CCS Implementation Dialogue (2 July) and the CATF EU CO₂ storage delivery-gap analysis. The Forum consolidates the structural pattern of European CCS moving from first-of-a-kind capture-only demonstration into commercial-scale transport-and-storage operations.

Eni CCUS Holding Attracts £500m+ from 13 International Lenders for L10-CCS Netherlands, Bacton CCS UK, Ravenna 50% Acquisition Option

Eni CCUS Holding attracted a £500m+ new-money package from thirteen international lenders (AK&M and Italian trade press coverage). The lender group includes Banco BPM, BNP Paribas, DNB, ING, Intesa Sanpaolo and eight further international lenders. The financing supports the L10-CCS Netherlands and Bacton CCS UK projects and provides an option for a potential 50% acquisition in Ravenna. The Eni CCUS Holding financing round is the largest single commercial-scale European CCS financing of 2026 to date and consolidates Eni CCUS Holding as the principal continental cross-border CCS operator with active positions in Italy, the Netherlands and the UK.

CO₂SITE Project Officially Launches to Support European CO₂ Storage Capacity (29 June)

On 29 June the CO₂SITE project officially launched to support European CO₂ storage capacity development (EuroGeoSurveys coverage). CO₂SITE is the principal continental technical-and-scientific support project for European CCS storage build-out and complements the parallel commercial-scale CCS storage architecture (Aramis, Porthos, Northern Lights, Prinos, Ravenna, Greensand, L10-CCS, Bacton CCS). The launch consolidates the structural pattern of European CCS technical-scientific-industrial coordination and is the principal Q3 2026 CCS storage support event.

5. Marine Energy

A quiet week for European marine-energy commercial announcements. The principal ongoing commercial-scale reference remains the SolarDuck + MARIN Steady Seas project (£3.2m subsidy from the Dutch national enterprise agency RVO for the offshore floating power hub combining offshore solar, wind and storage) from earlier in Q2 2026, together with the Ocean Energy Europe annual global ocean-energy resource report published on 29 June 2026 which is now the principal continental marine-energy commercial-reference document. The September 2026 CEF Energy call and the OPEN SEA demonstrator call remain the principal European procurement vehicles for wave and tidal engagement through H2 2026.

6. Hydropower

Portugal Announces National Energy Storage Strategy — 3 GW Battery + 3.9 GW Pumped Hydro by 2030

Portugal announced its National Energy Storage Strategy targeting 3 GW of battery storage and 3.9 GW of pumped hydro storage by 2030. A 750 MW battery storage auction has been announced and a hydro tender is expected by December 2026 (Portugal Post coverage). The Portuguese national storage strategy is the principal continental national-level energy storage architecture of Q3 2026 and complements the parallel EU tripartite storage agreement adopted at the Luxembourg Energy Council on 26 June (22 member states, 30–35 GW new capacity 2026–2028, 45 GW annual deployment target, 200 GW by 2030). The Portuguese 3.9 GW pumped-hydro target consolidates continued Iberian commitment to large-scale pumped-storage development alongside the operational Iberdrola Tâmega complex.

NES SALES OPPORTUNITY

Portugal 750 MW Battery Auction and 3.9 GW Pumped Hydro Procurement — Hydro Tender Expected December 2026

NES Tier 2/3 suppliers in pumped-storage civil engineering, penstock design, francis turbine engineering, control systems, transformer rooms, dam safety monitoring and battery-storage BOS should engage the Portuguese Ministry of Environment and Energy, EDP (Lisbon / Porto) and Iberdrola (Bilbao) procurement teams. The 750 MW battery auction and the December 2026 hydro tender open the Iberian storage engineering procurement window through 2027.

Statkraft Applies to NVE for New Underground Mår Hydropower Plant at Rjukan, Tinn Municipality

Statkraft applied to the Norwegian Water Resources and Energy Directorate (NVE) for a new underground Mår hydropower plant at Rjukan in Tinn municipality (Chemxplore coverage). The Mår hydropower plant upgrade complements the parallel Norwegian hydropower operational fleet and reinforces Statkraft's continued commercial commitment to Norwegian hydropower capacity extension. The NVE application is the principal Norwegian hydropower commercial-consenting event of Q2 2026 to date.

Türkiye Becomes Second-Largest Hydropower Producer in Europe

Türkiye has become the second-largest hydropower producer in Europe (Daily Sabah coverage). The ranking reflects the continued build-out of the Turkish hydropower fleet and consolidates Türkiye's position as one of the principal European hydropower geographies alongside Norway, Türkiye itself, Sweden and France. The ranking is the principal European hydropower commercial-scale reference event of Q3 2026 and complements the parallel European pumped-storage build-out in Portugal (3.9 GW by 2030), Bulgaria (ten newly identified sites) and Switzerland (Nant de Drance operational).

7. Geothermal

Vulcan Energy — €186m German Government Grants for Lionheart Programme; 35-Year Offtake with EnergieSüdwest

Vulcan Energy confirmed €186m of German federal, Rhineland-Palatinate and Hesse government grants for its Lionheart integrated geothermal-lithium programme (Ad-hoc-News coverage). Vulcan also confirmed a 35-year district-heating offtake agreement with EnergieSüdwest AG for heat delivered from its Landau plant. The €186m grant package is a structural complement to the previously reported €2.2bn Lionheart financing finalisation (26 June carry-over) and confirms Vulcan Energy as the European Tier 1 integrated geothermal-lithium operator. The 35-year district-heating offtake anchors the commercial-scale Landau geothermal operational revenue base through 2061 and provides the structural cash-flow anchor for the Frankfurt Industriepark Höchst integrated plant build-out.

Vulcan Energy Q2 Report Scheduled 30 July — Lionheart Operational Proof-Points Ahead

Vulcan Energy confirmed its Q2 2026 report is scheduled for 30 July 2026 (Ad-hoc-News coverage). The Q2 report will detail Landau operational proof-points and the Frankfurt Industriepark Höchst construction milestones. The report is the principal European integrated geothermal-lithium commercial-scale operational-proof event of H2 2026 to date and the structural investor-engagement moment against the €2.2bn Lionheart financing finalisation, the €186m grant package and the 35-year EnergieSüdwest offtake.

The 30 July report is the immediate priority engagement milestone for continental geothermal supply-chain positioning.

Eavor CleanTech Innovation of the Year 2026 Confirmed (Carry-Over)

Eavor Technologies' CleanTech Innovation of the Year 2026 award (announced the previous week) has been formally confirmed. The award consolidates the structural commercial-credibility signal for Eavor-Loop continental and global pipeline development (Geretsried operational, additional German sites, New Mexico, Japan). The CleanTech Innovation of the Year 2026 is the principal continental geothermal commercial-reference award of Q2 2026 and complements the parallel Vulcan Energy Lionheart financing finalisation and the €186m German government grant package.

8. Decommissioning & Norwegian Continental Shelf

Transocean and Equinor Sign \$1bn+ Package for Three Cat D Semisubmersibles — Seven Rig-Years, Q2 2027 to Q1 2028 Start

Transocean and Equinor signed a \$1bn+ package for three harsh-environment Cat D semisubmersibles (Transocean Enabler, Transocean Encourage and Transocean Endurance) covering a combined seven rig-years of NCS drilling execution. Transocean Enabler is a three-year contract starting Q1 2028; Transocean Encourage is a two-year contract starting Q1 2028; Transocean Endurance is a two-year contract starting Q2 2027. The day rate is approximately \$399k with an effective rate above \$400k after mobilisation and integrated-services. The Transocean–Equinor Cat D package is the largest single Cat D re-contracting package on the NCS of 2026 to date and consolidates continued NCS harsh-environment drilling execution against the Vår Energi Gjøa Subsea Projects FID, the Equinor Troll TWIN commitment, Johan Sverdrup Phase 4 (Tonjer + Geitungen), the Wisting EIA and the Peon tieback to the Gjøa hub.

NES SALES OPPORTUNITY

Transocean Cat D Semisubmersibles — Seven Rig-Years NCS Drilling Support Procurement Window

NES Tier 2/3 suppliers in drilling-services support, wireline, coring, ROV inspection, well integrity, downhole tools, cementing, completions, mud engineering, waste management, catering, deck crew engineering and integrated drilling-services support should engage Transocean (Vernier / Stavanger) and Equinor (Stavanger) procurement teams during H2 2026 and 2027. The seven rig-year package opens a multi-year Cat D drilling-services engineering procurement window through 2030.

Vår Energi – Equinor Execute Peon-for-Fram/Mulder/Grosbeak Asset Swap on NCS (30 June)

On 30 June Vår Energi and Equinor executed a multi-asset NCS swap: Vår Energi acquires a 32.5% interest in the Peon gas discovery (105–195 MMboe of gas), which will be tied back to the Gjøa hub extending its economic life to approximately 2045. Equinor takes a 5% interest in the Fram field together with stakes in the Mulder, Grosbeak discoveries and the Groenngylt prospect, strengthening its Troll and Fram cluster. The Peon tieback to Gjøa is the principal continental gas subsea capacity-extension event of Q3 2026 and consolidates the structural pattern of NCS hub-life-extension delivery: it complements the previous week's Gjøa Subsea Projects FID (Ofelia + Gjøa Nord + Cerisa, ~76 MMboe, first oil Cerisa 2027) and the Equinor Troll TWIN commitment (NOK 4bn, 11 bcm additional gas, 2028 startup).

NES SALES OPPORTUNITY

Vår Energi Peon Tieback to Gjøa — Hub Economic Life Extension to 2045 Procurement Window

NES Tier 2/3 suppliers in subsea production trees, manifolds, jumpers, umbilicals, gas metering, gas compression, dynamic risers, ROV inspection, gas-processing engineering and Gjøa host-platform interface engineering should engage Vår Energi (Stavanger), Equinor (Stavanger) and the Gjøa partner group during H2 2026. The Peon 105–195 MMboe tieback opens a multi-year subsea EPCI engineering procurement window through 2030.

Norwegian Offshore Workers Reach 5.2% Wage Deal on 2 July — Floating Production Platform Strike Averted

On 2 July the Norwegian offshore workers reached a 5.2% wage settlement with the Norwegian Shipowners' Association, averting a threatened strike at Norwegian floating production platforms (Norwegian trade-union and Norwegian Shipowners' Association coverage). The 5.2% settlement is the principal Norwegian offshore wage settlement of 2026 to date and consolidates continued floating production platform operational continuity across the NCS. The 5.2% wage settlement complements the previously agreed onshore Norwegian oil-service wage framework and provides the structural commercial-scale operational-continuity anchor for continued 2026–2028 NCS production delivery.

Norwegian Oil-Service Lockout Takes Effect 27 June — 4 Rigs, 5 Fixed Installations, 1 Intervention Vessel Halted

The Norwegian oil-service lockout took effect on 27 June affecting approximately 1,000 workers across the Norwegian oil-service sector. Four mobile rigs, five fixed installations and one intervention vessel were halted. Production impact is approximately 12,000 boepd in the first week and up to 120,000 boepd exposure if the lockout persists beyond mid-July. The oil-service lockout is the escalation of the earlier SAFE union strike that started 15 June, escalated 18 June and moved to formal lockout from 22 June. The oil-service lockout is now the most consequential Norwegian offshore labour disruption since 2020 and signals continued structural labour-cost and execution-risk pressure on the NCS subsea engineering pipeline through H2 2026.

Australia Orders In-Depth Review of Subsea7–Saipem Merger — ExxonMobil Opposition (3 July)

On 3 July Australia's Foreign Investment Review Board ordered an in-depth review of the Subsea7–Saipem merger following opposition from ExxonMobil (Reuters, Financial Times coverage). The Australian in-depth review is the principal regulatory setback for the Subsea7–Saipem merger after Brazil's CADE cleared the deal without restrictions the previous week. The combined Saipem7 entity is still expected to complete in H2 2026 but the Australian in-depth review adds regulatory-timeline risk and signals continued structural complexity in the largest European subsea-services merger of the decade. Saipem separately confirmed progress with its planned sale of part of Fincantieri assets and continued progress with its Saudi asset sale.

Nordic Discovery Cluster — Wellesley Petroleum Carmen Gas-Condensate Discovery Confirmed (up to 107 MMboe)

Wellesley Petroleum confirmed the Carmen gas-condensate discovery appraisal offshore Norway with recoverable resources up to 107 MMboe (Wellesley Petroleum press release). The Carmen appraisal is the principal Norwegian gas-condensate discovery-appraisal event of Q3 2026 to date and complements the

parallel Peon gas discovery tieback to the Gjøa hub (105–195 MMboe from the Vår Energi – Equinor asset swap) and the Wisting EIA (~500 MMboe Barents Sea). The Carmen appraisal is now the third continental Norwegian gas-condensate resource confirmation of 2026 to date.

Vår Energi Gjøa Subsea Projects Feed Continues — Ocean Installer / Moreld EPCI, Additional Subsea EPCI Awards Anticipated H2 2026

The Vår Energi Gjøa Subsea Projects FID from the previous week (Ofelia + Gjøa Nord + Cerisa, ~76 MMboe gross 2P, \$1.42bn / NOK 14bn, first oil Cerisa 2027 and Ofelia + Gjøa Nord H2 2028) continues to feed directly into 2026 Q3 subsea EPCI procurement. Ocean Installer (Moreld) is confirmed as EPCI contractor for Balder Next New Wells under the previously announced Strategic Partnership, and additional subsea EPCI awards are anticipated during H2 2026 across the seven-licence partner stack (Vår Energi, Harbour Energy, Petoro, OKEA, INPEX, ORLEN, DNO, Aker BP, Pandion).

Norske Shell Awards AGR 4-Year Framework for Ormen Lange Drilling Wells Personnel

Norske Shell awarded AGR a 4-year framework agreement for Ormen Lange drilling wells personnel. The framework consolidates AGR as the principal Ormen Lange drilling-wells personnel supplier and reinforces continued NCS gas-field operational continuity through 2030. The award complements the parallel Semco Maritime – INEOS 5-year framework for Danish North Sea services from the previous week and confirms the structural pattern of NCS long-cycle framework award delivery.

Eidesvik Offshore — New PSV Deal with Aker BP

Eidesvik Offshore confirmed a new Platform Supply Vessel (PSV) deal with Aker BP. The Eidesvik PSV deal complements Aker BP's continued operational programme against the NOD, Yggdrasil and broader NCS pipeline. Aker BP separately confirmed its Q2 2026 preliminary production and sales figures will be reported on 15 July.

Equinor Drilling Permit for Wellbore 30/8-7 S in PL 190 — Equinor 50%, Petoro 40%, TotalEnergies 10%

Equinor confirmed the drilling permit for wellbore 30/8-7 S in production licence PL 190. Partners are Equinor 50%, Petoro 40% and TotalEnergies 10%. The permit is the principal continental NCS drilling permit of the week and reinforces continued Equinor exploration-mode delivery against the wider NCS subsea capacity-extension programme through H2 2026.

9. Industry & Policy

EU Council Adopts Position on Grids Package — TEN-E Revision, Permitting Directive, Emergency Repairs Category (26 June)

On 26 June the EU Council formally adopted its position on the Grids Package. The Council position covers the TEN-E revision and the accompanying permitting directive, with congestion revenues rising from 10% from 2028 to 25% in 2031 for cross-border, and a new priority category established for emergency repairs to sabotaged interconnectors (Council of the EU press release). The Grids Package position is the principal continental grid-architecture policy adoption of Q3 2026 and the structural input to the European Commission end-July clean-energy package.

EU Tripartite Storage Agreement — 22 Member States, 30–35 GW New Capacity 2026–2028, 200 GW by 2030

The Luxembourg Energy Council of 26 June also concluded a tripartite storage agreement with 22 member states committing to 30–35 GW of new energy storage capacity between 2026 and 2028, an annual deployment target of 45 GW, and a total of 200 GW by 2030 (SolarPower Europe, Euronews coverage). The tripartite storage agreement is the principal European energy storage policy anchor of Q3 2026 and complements the parallel Portuguese National Energy Storage Strategy (3 GW battery + 3.9 GW pumped hydro by 2030, 750 MW battery auction announced, hydro tender expected December 2026).

MEPs ITRE / ENVI Committees Back Permitting Directive 57-3-8 — 7 MW Benefit-Sharing Threshold, 200 kW Capacity Threshold

The Members of the European Parliament in the ITRE and ENVI committees backed the Permitting Directive by 57-3-8 with tacit approval (European Parliament press release). The directive establishes a 7 MW benefit-sharing threshold and raises capacity thresholds from 100 kW to 200 kW. The Permitting Directive is the principal continental permitting-reform vehicle of Q3 2026 and consolidates the structural pattern of European renewables permitting acceleration alongside the Council position on the Grids Package. The Irish Presidency assumes on 1 July with the Industrial Accelerator Act autumn negotiations as its principal energy priority.

WindEurope — ETS Review to Prioritise Electrification, Not Speculative Hydrogen or CCS Schemes (17 July)

WindEurope called on the European Commission ETS review scheduled for 17 July to prioritise electrification over what it describes as speculative hydrogen and CCS schemes. The WindEurope position is the principal continental renewables industry-body policy input of early Q3 2026 and complements the parallel Electrification Action Plan scheduled for 15 July. The EPP is separately pushing to soften the ETS reforms in the same 15 July window, creating structural continental policy tension between renewables industry associations and centre-right European policy voices. The EU-US trade deal tariff implementation (25 June regulations from the previous week) remains in force.

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	Transocean–Equinor \$1bn+ Cat D 3-rig package — 7 rig-years, ~\$399k/day	Decom / NCS	Transocean, Equinor, drilling-services and integrated support suppliers	Enabler Q1 2028 3-yr; Encourage Q1 2028 2-yr; Endurance Q2 2027 2-yr	HIGH
2	Vår Energi Peon tieback to Gjøa hub — 105–195 MMboe, life to 2045	Decom / NCS	Vår Energi, Equinor, Gjøa partners, subsea EPCI suppliers	Asset swap complete; subsea EPCI H2 2026 onward	HIGH
3	Vattenfall Nordlicht I first monopile — Germany’s largest offshore wind (980 MW)	Fixed-Bottom Wind	Vattenfall, DEME, Nordlicht EPC framework	68 monopiles, ops 2028, 6 TWh/yr	HIGH

4	Greece Energean Prinos CCS — first SE Europe hub, €1bn+, works from October	CCUS	Energean, EnEarth, Greek Ministry of Environment and Energy	Installation from October 2026	HIGH
5	Norway Utsira Nord 1.5 GW floating wind award — Equinor/RWE/Parkwind	Floating Wind	Equinor, RWE, Parkwind, spar-buoy fabrication suppliers	150 Hywind spar-buoy turbines; 2030–2033 commissioning	HIGH
6	Iberdrola/BP Castellón hydrogen expansion — €211m IPCEI reallocation	Hydrogen	Iberdrola, BP, Spanish IPCEI Hy2USE programme	Phase-one 25 MW complete; phase-two open	HIGH
7	Aramis — Shell K14-FA/FC CO2 storage permit + Delta Rhine Corridor MoU	CCUS	Shell, EBN, Eni NL CCUS, Gasunie, OGE, TotalEnergies EP NL	Permit granted; DRC MoU signed	MEDIUM
8	Nel ASA FID on 1 GW pressurised alkaline production line at Herøya	Hydrogen	Nel ASA, Norwegian industrial-scale partners	Operations 2027	MEDIUM
9	Syvtallet 210 km H2 pipeline Denmark–Germany — €1.3bn IPCEI, FID 2027	Hydrogen	Energinet, Danish MoCE, German BMWK	FID 2027; operations 2030	MEDIUM
10	Portugal 750 MW battery auction + 3.9 GW pumped hydro tender (December 2026)	Hydropower	EDP, Iberdrola, Portuguese Ministry of Environment	Battery auction now; hydro tender December 2026	LOW-MED

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