INTELLIGENCE BRIEFING

Europe Offshore Low-Carbon Energy Sector

For North East Scotland Energy Supply Chain Companies | Week Ending 25 April 2026

COVERAGE PERIOD	AUDIENCE	SECTORS
18–25 April 2026 Non-UK European markets	NES Tier 2/3 Energy Supply Chain Companies	Offshore Wind · Hydrogen CCUS · Marine · Decom · Grid

Executive Summary

This has been an exceptionally active week for Europe's offshore low-carbon sector, dominated by the WindEurope Annual Event 2026 in Madrid (21–23 April), which crystallised the industry's shift from crisis to confidence following the North Sea Summit Investment Pact signed in Hamburg in January. The European Commission separately launched its 'AccelerateEU' clean energy plan on 22 April, reinforcing the political momentum. For North East Scotland (NES) supply chain companies, the week generated significant intelligence across offshore wind tendering, grid infrastructure, hydrogen technology, and decommissioning — with multiple directly actionable opportunities identified.

Headline Signals for NES Supply Chain

- France's landmark 10 GW mega-tender (5 GW fixed + 5 GW floating) is the largest single floating wind procurement globally — a direct opportunity for NES floating wind specialists
- The Netherlands has expanded its 2026 offshore wind tender to 2 GW, with final tender regulations due Q2 2026
- Five North Sea TSOs signed an MoU on offshore cable infrastructure resilience — creating cable protection, subsea services and survey opportunities
- Germany's He Dreiht (960 MW) and Borkum Riffgrund 3 (913 MW) are on the cusp of full commissioning, with EIB financing approved for German offshore wind expansion this week
- The EU fast-tracked 235 cross-border energy projects (113 electricity/offshore wind + 100 hydrogen + 17 CO_2 transport) under PCI/PMI status, unlocking CEF funding

1. Offshore Wind — Fixed Bottom

Germany: Record Q1 Capacity Growth & Commissioning Momentum

Germany recorded near-50% growth in newly commissioned wind capacity in Q1 2026, with 36 offshore turbines totalling 467.6 MW coming online — the first offshore installations since the equivalent quarter in 2025. These turbines were installed at the Borkum Riffgrund 3 and EnBW He Dreiht wind farms, both of which are on track for full commissioning in 2026. He Dreiht — Germany's largest offshore wind project at 960 MW, using 64 × 15 MW Vestas turbines — is targeting full commissioning by summer 2026. Borkum Riffgrund 3, a 913 MW Ørsted/Nuveen project with 83 × 11 MW turbines 72 km off the German North Sea coast, completed turbine installation in January 2026. The European Investment Bank this week (23 April) approved financing for offshore wind production in Germany as part of a €10 billion package, directly supporting German grid upgrades and clean energy scale-up.

NES SALES OPPORTUNITY
Both projects are in final commissioning/O&M transition phases. NES companies providing inspection, maintenance, marine services, cable protection and offshore logistics should engage German operators immediately for O&M contract pipelines. He Dreiht's PPA-backed revenue model (secured without subsidies through agreements with Allianz Capital Partners, AIP and Norges Bank Investment Management) signals financial stability for long-term O&M partnerships.

Netherlands: 2 GW Tender Confirmed for 2026

The Dutch Ministry of Economic Affairs and Climate Policy has expanded its 2026 offshore wind tender from 1 GW to 2 GW by adding the IJmuiden Ver Gamma-B site alongside the previously announced Gamma-A site. Both sites are rated at 1 GW each, with the Gamma-B maximum subsidy set at €0.103/kWh — slightly lower than Gamma-A due to higher expected wind yields. Final tender regulations are expected in Q2 2026, with both tenders closing in December 2026 and subsidy/permit decisions targeted for Q1 2027. Both wind farms will connect to the same offshore grid platform with cable landing at Maasvlakte, reducing cost and construction complexity.

NES SALES OPPORTUNITY
With tender close in December 2026 and permits in Q1 2027, the pre-FEED and FEED phases for both sites will run across 2027. NES companies in geotechnical surveys, cable installation, foundations, marine services and subsea infrastructure should begin direct engagement with the Netherlands Enterprise Agency (RVO) and prospective developers now.

Denmark: CfD Framework Approved, Tender Bids Due May 2026

The European Commission approved Denmark's €5 billion two-sided Contract for Difference (CfD) scheme this week for the Hesselø and North Sea I Mid offshore wind projects. This follows the failure to attract any bids in Denmark's December 2024 auction, which was widely credited to inadequate auction design. The North Sea I Mid project (minimum 1 GW, targeting ~4.6 TWh/year) has a tender deadline of May 2026. Denmark's new framework includes state-funded site investigations, revised penalty regimes and flexibility on installation timelines — directly addressing developer concerns that caused the 2024 no-bid outcome.

NES SALES OPPORTUNITY
Both Danish projects will begin supply chain procurement in 2027–28. NES firms should track awarded developers closely through the May 2026 bidding deadline, as these will be the gateway to subcontract opportunities.

WindEurope 2026: Madrid Call to Action

WindEurope's Annual Event in Madrid (21–23 April) drew 16,000+ participants and 600+ exhibitors, and released the 'Madrid Call to Action' — a 10-point programme urging EU leaders to treat electrification as a strategic priority. Key demands included fast-track permitting (treating wind as an overriding public interest), awarding at least 80% of bids in auctions to avoid artificial scarcity, repowering ageing wind farms to triple output, and prioritising grid connections for

mature strategic projects. WindEurope CEO Giles Dickson framed Europe's offshore wind as the continent's primary energy security tool, following the Hamburg Declaration's commitment to 15 GW/year of offshore wind 2031–2040. The European wind industry has committed to cutting offshore wind costs by 30% by 2040 compared to 2025 levels.

2. Offshore Wind — Floating

France: 10 GW Mega-Tender — The Biggest Floating Wind Opportunity Globally

France confirmed a landmark 10 GW combined offshore wind tender covering all national coastlines, reserving 5 GW specifically for floating wind — the largest single global procurement of floating offshore wind technology. The Ministry of Economy merged two previously separate auctions into a single tender across seven maritime zones: Brittany, the Atlantic coast, and the Mediterranean. France expects to launch the formal procurement process within months, with first contracts likely awarded by late 2026 or early 2027. The tender includes local and European manufacturing content requirements designed to reduce dependency on Chinese components. France's national targets include approximately 6 GW of floating capacity by 2040 and 45 GW of total offshore wind by 2050.

> **NES SALES OPPORTUNITY**
> Priority Rating: HIGH. This is the single most significant near-term European floating wind opportunity for NES supply chain companies. France's lack of established domestic floating wind supply chain creates a direct entry point for NES expertise in mooring systems, subsea power cables, installation vessels, dynamic cables and engineering services. NES companies should engage Ocean Winds (EDP/ENGIE JV, currently operating in France with two projects expected at full capacity imminently) and French port clusters as anchor customers. The mandatory European content requirements work in NES companies' favour.

Ocean Winds Updates at WindEurope 2026

Ocean Winds (OW), the 50/50 EDP Renewables/ENGIE JV, presented at WindEurope 2026 with a current gross portfolio of around 21 GW across 19 projects in 8 countries. OW currently has five projects under construction in France, Poland and the UK, with two French projects expected to reach full operational capacity in the coming months. OW's French projects — Dieppe Le Tréport (500 MW) and Îles d'Yeu et Noirmoutier (500 MW) — are both entering final commissioning stages, presenting immediate O&M contracting opportunities for NES specialist service firms.

3. Grid Infrastructure & Offshore Cables

Five North Sea TSOs Sign MoU on Cable Infrastructure Resilience

At WindEurope in Madrid on 22 April, five European transmission system operators (TSOs) — Elia (Belgium), Energinet (Denmark), 50Hertz (Germany), and TenneT (Germany and the Netherlands) — signed a Memorandum of Understanding to jointly strengthen offshore cable infrastructure in the North Sea. The MoU creates four working groups covering repair logistics, spare parts and equipment, fault detection, and legal/financial frameworks. The initiative is open to other TSOs from the Offshore TSO Collaboration (OTC) group, potentially expanding its

geographic scope. Subsea high-voltage cable disruptions are increasingly recognised as a critical systemic risk as offshore wind capacity expands and cross-border interconnector use intensifies.

> **NES SALES OPPORTUNITY**
> The MoU directly elevates demand for subsea cable protection systems, inspection and repair services, fault detection technology, and specialist ROV/survey services across Belgium, Denmark, Germany and the Netherlands. NES companies in these fields should engage the TSO procurement teams as the working groups operationalise. This is a multi-year framework contract environment worth tracking actively.

EIB Approves €2 Billion for Europe's Clean Energy Expansion

On 23 April, the EIB Group Boards approved a total of €10 billion in financing, with nearly €2 billion dedicated to Europe's clean energy investments, including loans specifically supporting offshore wind production in Germany and Dutch grid upgrades. The financing aligns with the European Commission's AccelerateEU plan launched the same day. AccelerateEU proposes accelerating the shift to homegrown clean energy, upgrading the energy system grid package, and scaling up private capital for the energy transition — with a Clean Energy Transition Investment Forum planned for May 2026.

EU Fast-Tracks 235 Cross-Border Energy Projects

On 9–10 April (published in the Official Journal), the EU adopted its updated PCI/PMI list comprising 235 cross-border energy projects — 113 electricity/offshore wind, 100 hydrogen and electrolyser, 17 CO_2 transport, and 3 smart gas grids. These projects benefit from streamlined permitting and CEF funding eligibility. The Commission will launch the 2026 CEF call at end of April, with applications due by end of September 2026. Offshore wind grid connections and interconnectors in Northern and Western Europe form a large proportion of the electricity project portfolio.

4. Hydrogen

European Resilience Alliance for Clean Hydrogen (ERA) Launched

On 14 April, the European Resilience Alliance for Clean Hydrogen & Derivatives (ERA) was officially launched at the European Parliament in Brussels, opened by European Commission Executive Vice-President Teresa Ribera. Founding members include ENAGÁS, FLUXYS, FORTUM, GASGRID FINLAND, MOEVE, NORDION ENERGI, OGE, RWE, SEFE, STEGRA, and THYSSENKRUPP, in cooperation with Hydrogen Europe. The ERA white paper highlighted that despite a large pipeline of projects, fewer than 7% have reached Final Investment Decision, with barriers including fragmented EU regulation, complex RFNBO rules, high electricity costs, insufficient demand certainty, and infrastructure uncertainty.

> **NES SALES OPPORTUNITY**
> ERA members include major gas infrastructure operators who will commission subsea hydrogen transport systems and offshore electrolyser integration projects. NES companies in pipeline engineering, subsea connectors and materials science should monitor ERA

procurement announcements and the four-pillar action plan framework published alongside the launch.

EU Approves €80 Billion Hydrogen Infrastructure Investment

On 9 April, the EU formally adopted over 100 hydrogen projects as Projects of Common Interest (PCI), unlocking an €80 billion fast-track infrastructure investment programme. These include cross-border pipelines and large-scale electrolysers. The hydrogen projects overlap substantially with the offshore wind pipeline — many are designed to consume offshore wind-generated electricity for green hydrogen production.

Sunfire Launches 50 MW Alkaline Electrolyser Module

German electrolyser manufacturer Sunfire unveiled its HyLink® Alkaline 23 system on 14 April — a 50 MW outdoor-rated pressurised alkaline module designed for triple-digit megawatt projects, reducing total installed costs for customers by up to 50%. The system is built on Sunfire's proven second-generation 30-bar(g) pressurised alkaline stack technology already operating in industrial plants across Europe. The system is five times larger than Sunfire's existing 10 MW module, enabling standardised scaling with prefabrication reducing on-site installation time.

NES SALES OPPORTUNITY
The commercialisation of 50 MW+ standardised electrolyser modules significantly de-risks hydrogen project financing and accelerates deployment. NES companies providing installation contracting, site civils, electrical integration, and O&M services for large-scale electrolyser systems should engage Sunfire and similar manufacturers (Nel, ITM Power, thyssenkrupp nucera) proactively.

H2CAST Project: 90 Tonnes Hydrogen Stored in German Salt Caverns

Approximately 90 tonnes of hydrogen were successfully stored in salt caverns in Germany as part of the H2CAST project — a significant step for large-scale hydrogen storage technology in Europe. This supports the emerging German hydrogen infrastructure backbone being developed by OGE, a founding ERA member, which is building a planned 9,000 km hydrogen core grid designed to enable industrial decarbonisation at national scale.

Germany's REFHYNE II: PPAs Secured for 100 MW Electrolyser

The EU-funded REFHYNE II project at Shell Energy and Chemicals Park Rheinland in Germany secured two Power Purchase Agreements (PPAs) for a 100 MW electrolyser scheduled to begin operations in 2027. One PPA is with Nordsee One, a 332 MW North Sea wind farm, under a five-year agreement covering approximately a third of the wind farm's output. When operational, the electrolyser is expected to produce up to 44 tonnes of renewable hydrogen per day and up to 16,000 tonnes annually.

5. CCUS

EU PCI List Includes 17 CO_2 Transport Infrastructure Projects

The EU's updated PCI/PMI list includes 17 CO_2 network projects — the largest-ever EU-level commitment to creating a CO_2 transport market. These projects will link industrial CO_2 capture investments to offshore storage facilities and are eligible for accelerated permitting and CEF funding access from end of April 2026.

BECCS Cross-Border CO_2 Shipping: First Commercial Evidence Maturing

The Swiss-based CO2 Energie project is advancing towards a storage agreement with INEOS Greensand to ship biogenic CO_2 across international borders, with operations expected to begin in Q2 2026. INEOS Greensand is the Danish North Sea CO_2 storage project — making this one of the first international cross-border CCUS logistics chains in Europe. A separate BECCS project featuring Capsol Technologies' CapsolEoP® capture solution is in pre-FEED for a European project designed to capture more than 500,000 tonnes of CO_2, with another project linking capture investments to the Prinos offshore storage site in Greece.

> **NES SALES OPPORTUNITY**
> The emergence of cross-border CO_2 transport chains creates direct demand for CO_2 shipping logistics, offshore injection infrastructure, subsea pipeline engineering, and CCUS project management services. NES companies with offshore pipeline, subsea engineering and project services backgrounds have directly transferable capabilities.

6. Marine Energy

IEA-OES Publishes Landmark 10-Year Ocean Energy Report

The International Energy Agency's Ocean Energy Systems Technology Collaboration Programme (IEA-OES) published its "International WaTERS: Summary of Findings and Lessons Learned" report on 8–9 April 2026, consolidating a decade of experience from global wave and tidal energy test centres. The report was prepared by EMEC (European Marine Energy Centre, based in Orkney, Scotland) and highlights how test centres can accelerate ocean energy deployment through collaboration, adaptive regulation and targeted investment. The tidal energy market — valued at approximately USD 1.7 billion in 2026 — is projected to grow to USD 3.66 billion by 2030 at a 21.1% CAGR.

> **NES SALES OPPORTUNITY**
> NES companies with EMEC supplier relationships and marine energy technology experience (subsea structures, moorings, power take-off systems, grid connection) should leverage the IEA-OES report's heightened profile to pursue European marine energy project pipelines, particularly in France (Paimpol-Bréhat tidal zone) and Norway.

7. Decommissioning

Odfjell Technology Secures 5.5-Year ConocoPhillips Norway Contract

On 21 April, Odfjell Technology announced a five-and-a-half-year integrated services contract with ConocoPhillips Skandinavia for platform drilling operations, maintenance services, tubular running services, well engineering, well planning, and — critically — permanent plug and

abandonment (P&A) execution on the Norwegian Continental Shelf through to 31 December 2031. This contract is a template for the type of long-duration, integrated decommissioning/well services arrangements becoming the standard in Norway.

> **NES SALES OPPORTUNITY**
> Norway's dominance in North Sea decommissioning (alongside the UK) is set to intensify, with Europe's decommissioning market reaching USD 4.52 billion in 2026 and growing at 5.9% CAGR through 2033. Over 600 fixed platforms and 10,000+ offshore wells in the North Sea are scheduled for removal over coming decades. NES well services, subsea intervention, engineering and project management companies should target Norwegian operators aggressively.

North Sea Decommissioning: 25,000 Job Opportunity Report Published

A first-of-its-kind report published this week (25 April) found that urgent action to enforce legal decommissioning obligations for North Sea oil and gas infrastructure could create up to 25,000 UK jobs and deliver up to £15 billion in economic benefit. While the report focuses on UK jobs, the same dynamic applies across the Norwegian and wider European North Sea. NES supply chain companies providing decommissioning services must position for European (especially Norwegian and Dutch) market expansion as a natural extension of their UK North Sea expertise.

Mermaid Subsea Extends Island Valiant for North Sea Decommissioning

Mermaid Subsea Services (UK) extended its contract for the subsea support vessel Island Valiant, reinforcing its operational position in the North Sea decommissioning market. This comes amid a recognised decline in available Mobile Offshore Drilling Units (MODUs) capable of both drilling and decommissioning — with only five semi-submersible rigs remaining on the UK Continental Shelf.

8. Industry & Policy Developments

Norwegian-German Offshore Wind Working Group Formalised

Norwegian Offshore Wind and the German-Norwegian Chamber of Commerce formally launched a dedicated German-Norwegian Offshore Wind Working Group on 21 April, aimed at identifying cross-border business opportunities and strengthening supply chain integration between Germany and Norway. The group includes offshore and subsea suppliers and is positioned as a platform connecting companies, policymakers and market actors.

> **NES SALES OPPORTUNITY**
> The NES supply chain's existing deep relationships with Norwegian operators and its growing German offshore wind exposure make this working group a direct networking and intelligence asset. NES cluster representatives should seek affiliation with this group as a route to both markets simultaneously.

EU AccelerateEU Plan Launched — 22 April 2026

The European Commission published AccelerateEU on 22 April, directly linking the escalating Middle East conflict (driving fossil fuel price spikes) to an urgent need to accelerate Europe's

clean energy transition. The plan covers five areas: increased EU country coordination on energy security; consumer and industry protection from price peaks; accelerated shift to homegrown clean energy; energy system grid upgrade (EU Grids Package); and mobilisation of private capital. A Clean Energy Transition Investment Forum is planned for May 2026, followed by a Clean Energy Investment Summit later in 2026.

Nordex N175/6.X Turbine Receives TÜV SÜD Type Approval

At WindEurope in Madrid (21 April), the Nordex Group received type approval from TÜV SÜD for its 179-metre hybrid concrete tower solution for the N175/6.X turbine. Nordex also unveiled a 7.3 MW power mode for the turbine, targeting deployment in key European markets. Vestas secured a 70 MW order for the Strazhitsa wind project in Bulgaria (11 × EnVentus V162-6.4 MW turbines), with delivery from early 2027.

9. Sales Intelligence: Priority Actions for NES Supply Chain

The following priority opportunities are ranked by urgency and alignment with typical NES supply chain strengths:

PRIORITY	OPPORTUNITY	MARKET	TIMELINE	ACTION REQUIRED
HIGH	France 10 GW floating + fixed wind tender	France	Contracts: late 2026	Engage French port clusters, Ocean Winds, ENGIE/EDP procurement; register European content capability
HIGH	Netherlands 2 GW IJmuiden Ver Gamma-A/B tender	Netherlands	Tender close: Dec 2026	Pre-position with RVO and prospective developers; attend Dutch offshore wind industry events
HIGH	North Sea TSO offshore cable MoU (4 countries)	BE/DK/DE/NL	Immediate	Target Elia, Energinet, 50Hertz, TenneT procurement for cable protection, inspection, repair and survey
MEDIUM	Germany He Dreiht + Borkum Riffgrund 3 O&M	Germany	From Q3 2026	Approach EnBW and Ørsted German O&M procurement for post-commissioning service contracts
MEDIUM	EU PCI/PMI CEF Funding Call (April 2026)	EU-wide	Applications: Sept 2026	Identify NES consortium partners in hydrogen, CO_2 transport and offshore grid projects; apply via CEF

PRIORITY	OPPORTUNITY	MARKET	TIMELINE	ACTION REQUIRED
MEDIUM	Norway ConocoPhillips/Odfjell-type P&A contracts	Norway	2026–2031	Target Norwegian operators for well services, P&A engineering and project management
LOW-MED	Danish CfD offshore wind (Hesselø + N Sea I Mid)	Denmark	Bids: May 2026	Monitor awarded developers post-May 2026; engage from Q4 2026 for subcontract positioning
LOW-MED	CCUS CO_2 transport infrastructure (17 PCI projects)	EU-wide	2026–2030	Target Capsol, INEOS Greensand and Greek Prinos storage project for subsea/pipeline services
LOW-MED	Sunfire/Electrolyser scale-up installation	Germany/EU	2026–2027	Engage Sunfire, Nel, ITM Power for on-site installation, civils and integration contracts

10. Market Context: Confidence Returning, Costs Still a Risk

Europe's offshore wind sector is navigating a turning point characterised by restored political confidence but persistent economic headwinds. Wind now delivers approximately 20% of Europe's electricity, and record generation levels were set across multiple countries in early 2026 driven by expanded offshore fleets. However, the sector has not yet achieved what analysts describe as a 'container moment' — the breakthrough that unlocks massive standardisation and scale. Supply chain constraints, higher capital costs and grid connection backlogs remain systemic challenges. For NES suppliers, the key insight is that the market is rewarding companies that can demonstrably reduce project costs and execution risk — exactly the expertise accumulated over decades in the North Sea oil and gas sector.

The RENIXX renewable energy stock index reached a new 2026 yearly high during the week, breaking through the 1,300-point mark — providing a positive financial backdrop for project financing and investment decisions. For the hydrogen sector, 2026 is widely seen as the pivotal year for the first major Final Investment Decisions on hydrogen and ammonia projects in Europe.

Intelligence compiled by ExportCentral AI for North East Scotland energy supply chain companies. Covers European (non-UK) offshore low-carbon sector developments for the 7-day period ending 25 April 2026. All market intelligence should be verified with primary sources before commercial action is taken.

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