EXPORTCENTRAL AI · WEEKLY INTELLIGENCE

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 8 August 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

IN THIS WEEK'S BRIEFING

Executive Summary

The week to 8 August 2026 was defined by Denmark's return to credible commercial-scale offshore wind procurement and by the continued consolidation of continental European CCUS transport-and-storage and NCS subsea capability that underpin the North East Scotland Tier 2/3 supply chain build-out.

On 4 August, the Danish Energy Agency confirmed Vattenfall as the sole winner of the reformed 1.8 GW two-sided contract-for-difference tender launched in April 2025, awarding both the 800 MW Hesselo (Kattegat, 30 km off both the Danish and Swedish coasts, 5 bids submitted) and 1 GW Nordsoen Midt (North Sea I Mid, 20 km off Hvide Sande on the Jutland coast, 2 bids submitted) sites at strike prices of DKK 542/MWh (€72.70) and DKK 504/MWh (€67.43) respectively, on 20-year contracts with completion by 2032.

The tender is the first successful Danish offshore-wind auction since the December 2024 3 GW open-door tender failed to attract a single bid and marks the practical validation of Denmark's reformed two-sided CfD architecture: the state pays if market prices fall below the strike price, and receives the delta if market prices exceed it, sharing risk between developer and public purse.

Vattenfall is expected to deploy at least three suppliers across the two projects (turbines, foundations, HVDC substation), replicating its Nordlicht (1.6 GW, Germany), Kriegers Flak (600 MW, Denmark) and Norfolk Vanguard (offshore Norfolk, UK) supply-chain architecture, opening an immediate multi-year continental commercial-scale Danish offshore-wind commercial-scale engineering procurement engagement window through the 2032 commissioning target.

Continental commercial-scale CCUS delivery consolidated significantly. Aker Solutions confirmed the start of construction for its second-generation Norwegian CCS projects during Q2 2026 (results published 14 July, briefed in this week's window with follow-through commissioning activity 2-8 August), covering the Hafslund Celsio Klemetsrud plant in Oslo (350 kt CO_2/yr capture, first Norwegian waste-to-energy CCS with commercial storage into Northern Lights) and Northern Lights Phase 2 (Bergen, capacity expansion from 1.5 to 5 Mt CO_2/yr by 2028). Q2 2026 revenue reached NOK 13.1 bn, order intake NOK 9.9 bn and total backlog NOK 77.2 bn.

Northern Lights JV (Equinor / TotalEnergies / Shell) concluded its Phase 1 LCO2 fleet with the fourth Dalian-built carrier Northern Purpose in service (delivery 29 July, in-service August), consolidating the world's first cross-border commercial-scale CO2 transport fleet and enabling the parallel Yara

Netherlands (€120m/yr contract, 800 kt CO2), Ørsted Kalundborg (Denmark, 430 kt CO2/yr) and Stockholm Exergi (BECCS, 800 kt CO2/yr) storage services.

On the M&A front, Saipem and Subsea7 confirmed clearance of the US Hart-Scott-Rodino antitrust review on 31 July (announced 3 August), with US closure now unconditional; the European Commission Phase II merger review deadline was extended by 14 working days to 16 December 2026 (from 26 November) and the Australian ACCC review continues in Phase 2. The merger, once cleared, will create a NOK 200 bn+ subsea engineering contractor with headquarters in London and Milan and combined subsea backlog of approximately €43 bn as of Q2 2026.

European deep-geothermal delivery accelerated. On 5 August, the GIGA-M consortium (TUM, Stadtwerke Munchen, Erdwarme Grunwald, City of Munich, Stadtwerke Furstenfeldbruck, Stadtwerke Bad Toelz) confirmed the largest 3D seismic survey in Munich metropolitan history for late August 2026 through November, covering 1,100 km2 across five Bavarian districts (Munich, Bad Toelz-Wolfratshausen, Miesbach, Starnberg, Furstenfeldbruck), using vibroseis trucks and geophones to map deep-geothermal reservoirs to 5 km. Daldrup & Sohne separately confirmed a contract award for two additional deep-geothermal wells at Aschheim near Munich, drilling to 3,700 m from late 2026 to mid-2027 and extending the district's geothermal district-heating capacity to more connected homes.

NCS decommissioning delivery consolidated with AF Gruppen (AF Offshore Decom) and Heerema Marine Contractors's second UKCS platform-removal engineering contract, replicating the February 2026 first EPRD award.

On hydropower, ANDRITZ's 17 MW variable-speed pump-turbine order at Vouglans / Saut-Mortier in eastern France (award 20 July, execution 2026–2031) continues to underpin European pumped-storage renewals, with 80–85 MW added to the Ain river cascade and storage capacity lifted from 50 to 250 GWh.

On marine energy, CorPower Ocean's C4 WEC world-first DNV Prototype Certificate (21 July) continues to consolidate the wave-energy industrialisation pipeline into Viana do Castelo (Portugal) and EMEC Orkney (Scotland). Poland's West Pomerania offshore-wind hub consolidation continues, with Swinoujscie Offshore Terminal 70% booked and Windar Renovables Szczecin factory delivering 450 jobs, positioning West Pomerania as the principal Baltic offshore-wind manufacturing and marshalling hub alongside Rostock, Aalborg and Klaipeda.

Headline Signals — Week Ending 8 August 2026

- Vattenfall wins Denmark 1.8 GW two-sided CfD offshore-wind tender (4 August) — Hesselo 800 MW at DKK 542/MWh (€72.70) with 5 bids; Nordsoen Midt (North Sea I Mid) 1 GW at DKK 504/MWh (€67.43) with 2 bids; 20-year contracts; completion by 2032; first successful Danish offshore-wind auction since December 2024 zero-bid failure.
- Saipem — Subsea7 clear US HSR antitrust review (31 July, announced 3 August) — US closure now unconditional; European Commission Phase II deadline extended by 14 working days to 16 December 2026 (from 26 November); Australian ACCC review continues in Phase 2.

- Aker Solutions confirms second-generation Norwegian CCS construction start — Hafslund Celsio Klemetsrud (Oslo, 350 kt CO_2/yr) and Northern Lights Phase 2 (Bergen, 1.5–5 Mt CO_2/yr by 2028); Q2 2026 revenue NOK 13.1 bn, order intake NOK 9.9 bn, backlog NOK 77.2 bn.
- Northern Lights takes fourth LCO_2 carrier Northern Purpose into service — Dalian Shipbuilding; completes Phase 1 fleet of four carriers alongside Northern Pioneer, Northern Pathfinder and Northern Prospect; commercial storage under way for Yara Netherlands, Ørsted Kalundborg and Stockholm Exergi.
- AF Gruppen (AF Offshore Decom) and Heerema Marine Contractors secure second UKCS platform-removal engineering contract — replicates February 2026 first EPRD award; Norwegian-Dutch consortium dominant on cross-border UKCS decom work.
- GIGA-M consortium confirms largest 3D seismic survey in Munich metropolitan history (late August 2026 to November) — 1,100 km2 covering Munich, Bad Toelz-Wolfratshausen, Miesbach, Starnberg, Furstenfeldbruck; vibroseis and geophone campaign; deep-geothermal reservoir mapping to 5 km.
- Daldrup & Sohne wins contract for two additional deep-geothermal wells at Aschheim (Munich) — 3,700 m TD; drilling from late 2026 to mid-2027; extends district-heating capacity for connected homes in the Munich metropolitan district-heating network.
- ANDRITZ Vouglans / Saut-Mortier (France) 17 MW variable-speed pump-turbine order continues into implementation — award 20 July; 80–85 MW added; storage 50→250 GWh; execution 2026–2031; Ain river cascade modernisation.
- CorPower Ocean C4 WEC world-first DNV Prototype Certificate (21 July, carry-over) — anchors industrial commercial-scale wave farms at Viana do Castelo (Portugal, 10 MW VianaWave) and EMEC Orkney (Scotland, 5 MW Valiant); C5 development underway.
- Poland West Pomerania consolidates position as Baltic offshore-wind hub — Swinoujscie Offshore Terminal 70% booked; Windar Renovables Szczecin factory 450 jobs; West Pomerania consolidates alongside Rostock, Aalborg and Klaipeda as principal Baltic offshore-wind marshalling hub.

1. Offshore Wind — Fixed Bottom

Vattenfall Wins Denmark 1.8 GW Two-Sided CfD Offshore-Wind Tender (4 August) — Hesselo 800 MW and Nordsoen Midt 1 GW, Completion by 2032

On 4 August, the Danish Energy Agency confirmed Vattenfall as the sole winner of Denmark's reformed two-sided contract-for-difference offshore-wind tender launched in April 2025. Vattenfall was awarded both sites in the tender: Hesselo (800 MW, in the Kattegat approximately 30 km off both the Danish and Swedish coasts) at a strike price of DKK 542/MWh (approximately €72.70/MWh), with 5 bids submitted; and Nordsoen Midt (also known as North Sea I Mid, 1 GW, approximately 20 km off Hvide Sande on the Jutland North Sea coast) at DKK 504/MWh (approximately €67.43/MWh), with 2 bids submitted. Both awards are 20-year contracts with completion by 2032. Under Denmark's reformed two-sided CfD architecture, the state pays the developer if wholesale market prices fall below the strike price and receives the delta if market prices exceed it, sharing price risk between the developer and the Danish public purse. The tender is the first successful Danish offshore-wind auction since the December 2024 3 GW open-door tender failed to attract a single bid. Vattenfall is expected to deploy at least three principal supply-chain positions across the two projects (turbines, foundations, HVDC substation) alongside its

Nordlicht (1.6 GW, Germany), Kriegers Flak (600 MW, Denmark) and Norfolk Vanguard (offshore Norfolk, UK) architecture. The awards restore commercial-scale credibility to Danish offshore-wind procurement and consolidate Denmark alongside Germany, the Netherlands, France, Spain, Portugal and Italy as one of the principal continental commercial-scale offshore-wind destinations.

NES SALES OPPORTUNITY

Vattenfall Denmark 1.8 GW Two-Sided CfD Award — Danish Commercial-Scale Offshore-Wind Engineering Procurement Window

NES Tier 2/3 suppliers in transition-piece secondary steel, boat landings, external platform outfitting, corrosion management, marine coatings, dynamic export cable inspection, HV commissioning, mechanical completion, marine warranty, ROV inspection, offshore installation support and integrated T&I services should engage Vattenfall (Solna / Amsterdam) and the Danish Energy Agency (Copenhagen) immediately, with parallel positioning against Bornholm Energy Island (Per Aarsleff DKK 3.7 bn substation, Denmark) and wider North Sea and Kattegat commercial-scale Danish offshore-wind procurement architecture. The 4 August award opens the immediate multi-year continental commercial-scale Danish offshore-wind commercial-scale engineering procurement engagement window through the 2032 commissioning milestone.

Poland West Pomerania Consolidates Position as Baltic Offshore-Wind Hub — Swinoujscie Terminal 70% Booked, Windar Renovables Szczecin 450 Jobs

The Polish West Pomerania voivodeship has consolidated its position as the principal Baltic offshore-wind manufacturing and marshalling hub, with the Swinoujscie Offshore Terminal now 70% booked for construction marshalling contracts across the Polish and wider Baltic offshore-wind pipeline, and Windar Renovables's Szczecin monopile factory delivering 450 direct jobs on the ground. The West Pomerania hub consolidation is a structural signal of continued Central European commercial-scale Baltic offshore-wind commercial-scale supply-chain build-out and consolidates the region alongside Rostock (EEW Special Pipe Constructions), Aalborg (CS Wind Offshore, Vestas towers) and Klaipeda as the principal continental commercial-scale Baltic offshore-wind manufacturing and marshalling hubs. The hub consolidation complements the parallel Baltic Power (Orlen / Northland Power) first grid power (Poland's first operating offshore wind farm, 1.2 GW, 76 x Vestas V236-15 MW), the Per Aarsleff DKK 3.7 bn Bornholm Energy Island substation award, and the wider continental commercial-scale Baltic offshore-wind procurement pipeline (Baltyk II / III, MFW Bialystok, C-Wind and follow-on Polish offshore-wind rounds).

NES SALES OPPORTUNITY

Poland West Pomerania Offshore-Wind Hub — Baltic Commercial-Scale Manufacturing and Marshalling Engineering Procurement Window

NES Tier 2/3 suppliers in secondary steel fabrication, boat landings, cathodic protection, corrosion management, marine coatings, mechanical completion, dynamic export cable inspection, ROV inspection, marine warranty, offshore commissioning and integrated T&I services should engage the Swinoujscie Offshore Terminal operator, Windar Renovables (Szczecin), Vestas Poland (Szczecin), Orlen (Warsaw / Plock) and Northland Power (Toronto / Warsaw). The West Pomerania consolidation opens the immediate multi-year continental commercial-scale Baltic offshore-wind commercial-scale engineering procurement engagement window through 2028–2030 and beyond.

Vattenfall Nordlicht I — Ongoing Transition-Piece Delivery and Installation (Carry-Over)

Vattenfall's 1.6 GW Nordlicht I project continues from monopile installation into the transition-piece phase, with CS Wind Aalborg loading out 362-tonne transition pieces on 28 July for DEME transport and installation at the site 85 km north of Borkum in the German North Sea. Nordlicht I comprises 68 monopiles and 68 transition pieces manufactured by EEW Special Pipe Constructions (Rostock) and CS Wind (Aalborg) respectively. Nordlicht I is the principal element of the Nordlicht 1.6 GW cluster in the German North Sea, comprising Nordlicht I and Nordlicht II, which will together become Germany's largest offshore wind cluster. The ongoing TP delivery is a structural signal of continued Vattenfall commercial-scale offshore-wind commercial-scale delivery and complements the parallel Vattenfall Denmark 1.8 GW two-sided CfD tender award, the RWE Nordseecluster A first-power event (previous windows), and the wider continental commercial-scale German North Sea offshore-wind procurement architecture.

TenneT Ultra-Mega HVDC Framework and BalWin5 Substructure — Continued Continental HVDC Consolidation (Carry-Over)

The 28 July TenneT Ultra-Mega HVDC framework award to Hitachi Energy and Larsen & Toubro (€1.5 bn+, 8 GW at 525 kV DC across Nederwiek 3, LanWin 5, IJmuiden Ver Alpha and Nederwiek 1 with first delivery mid-2028) and the 31 July SK Oceanplant / Seatrium BalWin5 substructure contract ($110.71 m, 15,000 t jacket + 20 piles, 2.2 GW German North Sea HVDC offshore substation) continue to consolidate continental commercial-scale HVDC procurement architecture into H2 2026 and 2027. Structural NES Tier 2/3 engagement continues around Hitachi Energy (Zurich / Ludvika), Larsen & Toubro (Mumbai / Hazira), Seatrium (Singapore), SK Oceanplant (Goseong), TenneT NL (Arnhem) and TenneT Germany (Bayreuth) for HVDC substation secondary steel, cable pull-in equipment, HV commissioning, mechanical completion, offshore secondary steel fabrication, transformer and converter integration, marine warranty, dynamic export cable inspection, ROV inspection and integrated HV subsystem services.

2. Offshore Wind — Floating

France Floating-Wind Port Programme — Continued Consolidation (Carry-Over)

The 29 July French government confirmation of €260 m of public support across five floating-wind ports — Cherbourg (Manche), Brest (Finistere), Nantes-Saint-Nazaire (Loire-Atlantique), Port-la-Nouvelle (Occitanie) and Marseille-Fos (Bouches-du-Rhone) — continues into implementation. The awards anchor France 2030's target of 6 GW of floating wind by 2040 and consolidate France as the principal continental commercial-scale floating-wind commercial-scale procurement destination alongside Norway, Portugal, Spain, Italy and (in future) Ireland. The DEOS Fos-sur-Mer platform commitment (BW Ideol / NGE Fos3F factory delivering 30 floating-wind foundations per year, approximately 500 MW/yr, backed by €330 m of Fos 3XL port infrastructure investment and €82.3 m of ADEME support) continues to consolidate Marseille-Fos as one of the principal continental commercial-scale Mediterranean floating-wind assembly hubs.

Ocean Winds EFGL Full Operations (Carry-Over) — 30 MW off Leucate-Le Barcares, World-First Biohut Biodiversity Module

Ocean Winds's 30 MW Eoliennes Flottantes du Golfe du Lion (EFGL) reached full operations on 28 July off Leucate-Le Barcares (Occitanie), comprising three 10 MW turbines mounted on Principle Power WindFloat semi-submersible platforms. EFGL is the second commercial-scale European floating-wind pilot to reach full operations after Kincardine (Scotland). The world-first Biohut nature-inclusive floating-wind biodiversity module installed on one of the three WindFloat platforms in partnership with Ecocean, marine research organisations and the French Office francais de la biodiversite (OFB) continues to signal continued continental commercial-scale floating-wind commercial-scale nature-inclusive design commitment. Ocean Winds is a 50/50 joint venture between EDP Renewables and ENGIE.

Norway Utsira Nord — KS2 Review Deferral (Carry-Over)

The Norwegian Storting continues its full NOK 35 bn KS2 external quality-assurance review of the Utsira Nord subsidy architecture on cost-escalation and process grounds. The KS2 review defers the political decision on the 1.5 GW award to Equinor / RWE / Parkwind, TotalEnergies Statkraft, Cerulean Winds, Coria Renovaveis, Deep Wind Offshore and Ocean Sun. The KS2 review is a structural signal of continued Norwegian commercial-scale floating-wind subsidy scrutiny and shifts the Norwegian commercial-scale floating-wind procurement window into H1 2027.

3. Hydrogen

The week to 8 August 2026 was quiet for continental commercial-scale European hydrogen news, reflecting the wider European summer procurement lull. Structural procurement engagement continues around the parallel ENGIE / European Energy Kasso 150 MW Danish-German cross-border green-hydrogen build-out (previous week, 2030 operations), the Iberdrola Espana / bp Iberian green-hydrogen and mobility partnership expansion (previous window), the AICEP Sines first commercial order for the European Electrolyser Alliance venture at Sines (Portugal), the Theia / RCT Hydrogen 10 MW electrolyser follow-on at the Portuguese Sines hydrogen valley, the wider EU Hydrogen Bank IF24 auction grant signings (€270.6 m to six projects including the Kristinestad PtX Finland 200 MW project at €0.33/kg, Iberdrola NOON Spain 120 MW and follow-on IF24 awards), and the wider continental commercial-scale European Hydrogen Backbone architecture. Structural NES Tier 2/3 engagement continues around ENGIE (Courbevoie), European Energy (Soborg), Iberdrola (Bilbao), bp (London / Madrid), AICEP (Lisbon), RCT Hydrogen (Lisbon), the European Commission DG CLIMA, DG ENER, CINEA and the wider European Hydrogen Bank architecture for alkaline / PEM electrolyser BoP, high-pressure gas handling, hydrogen embrittlement testing, cross-border hydrogen pipeline design and construction, KOH handling, hydrogen purification and compression.

EU IF26 Hydrogen Auction Consultation Remains Open to 24 August (Webinar 8 September)

The EU IF26 Hydrogen Auction draft Terms and Conditions consultation (€500 m budget, €4/kg premium ceiling, 75% non-China electrolyser components, launch by end-2026) remains open to 24 August, with the information webinar scheduled for 8 September 2026 by the European Commission DG CLIMA. Structural continental commercial-scale European Hydrogen Bank procurement engagement continues through H2 2026 and 2027 around the European Commission DG CLIMA, DG ENER, CINEA and the principal continental commercial-scale hydrogen developer architecture (ENGIE, European Energy, Iberdrola, Repsol, RCT Hydrogen, Elyse Energy, Fertighy, Engie Solutions H2 and OMV). The IF26 auction is the third annual EU Hydrogen Bank auction (following IF23 and IF24) and represents the principal continental commercial-scale European Hydrogen Bank procurement vehicle for green-hydrogen offtake through 2028–2030.

4. CCUS — Carbon Capture, Use & Storage

Aker Solutions Confirms Second-Generation Norwegian CCS Construction Start — Hafslund Celsio Klemetsrud (350 kt CO2/yr) and Northern Lights Phase 2 (1.5→5 Mt CO2/yr by 2028)

Aker Solutions confirmed the start of construction for its second-generation Norwegian CCS projects during Q2 2026, with follow-through construction activity through the current 2-8 August window. The projects cover the Hafslund Celsio Klemetsrud plant in Oslo (350 kt CO2/yr capture from municipal waste-to-energy, the first Norwegian waste-to-energy CCS with commercial storage into Northern Lights), and Northern Lights Phase 2 (Bergen, capacity expansion from the current 1.5 Mt CO2/yr to 5 Mt CO2/yr by 2028). Q2 2026 revenue reached NOK 13.1 bn, order intake NOK 9.9 bn (including HVDC substation substructure orders, electromechanical equipment for the Tussa II hydropower plant in Norway and a long-term frame agreement with Cenovus Energy in Canada) and total backlog NOK 77.2 bn. The second-generation Norwegian CCS construction start is one of the principal continental commercial-scale CCUS commercial-scale infrastructure milestones of 2026 and consolidates Aker Solutions (Fornebu) as the principal continental commercial-scale Norwegian CCS engineering contractor alongside Petrofac, TechnipFMC, McDermott, Sembcorp, Seatrium and Larsen & Toubro. The construction start is a structural signal of continued Norwegian commercial-scale CCUS commercial-scale delivery commitment and complements the parallel Northern Lights Phase 1 fleet completion, the Danish $2.55 bn Aalborg Portland CCS contract, the German $5.7 bn Carbon Contracts for Difference programme, and the wider continental commercial-scale CCUS pipeline.

> NES SALES OPPORTUNITY
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> **Aker Solutions Second-Generation Norwegian CCS Construction Start — Norwegian Commercial-Scale CCUS Engineering Procurement Window**
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> NES Tier 2/3 suppliers in offshore CO2 injection systems, MMV instrumentation, seabed inspection, CO2 pipeline integrity, subsea intervention, ROV inspection, marine warranty, amine capture BoP, high-pressure compression, cross-border LCO2 handling and integrated subsea CCUS services should engage Aker Solutions (Fornebu), Hafslund Celsio (Oslo), Northern Lights JV (Bergen), Equinor (Stavanger), TotalEnergies (La Defense), Shell (The Hague) and the Norwegian Ministry of Energy. The second-generation construction start opens the immediate multi-year continental commercial-scale Norwegian CCUS commercial-scale engineering procurement engagement window through the 2028 Phase 2 capacity expansion and beyond.

Northern Lights Fourth LCO2 Carrier Northern Purpose Enters Service — Phase 1 Fleet Complete

The fourth Dalian-built LCO2 carrier Northern Purpose entered service in the current week (delivery 29 July, in-service in August), completing the Northern Lights Phase 1 CO2 transport fleet of four vessels (Northern Pioneer, Northern Pathfinder, Northern Prospect and Northern Purpose). The Phase 1 fleet completion enables the parallel Yara Netherlands (€120 m/yr contract, 800 kt CO2), Orsted Kalundborg (Denmark, 430 kt CO2/yr) and Stockholm Exergi (BECCS, 800 kt CO2/yr) commercial CO2 storage services. Larger Phase 2 carriers are due from 2028. The Phase 1 fleet completion is one of the principal continental commercial-scale CCUS commercial-scale infrastructure milestones of 2026 and consolidates Northern Lights JV (Bergen) as the principal continental commercial-scale CCUS transport-and-storage backbone operator alongside Aramis (Netherlands, Porthos Stage 1 2020–2026, Stage 2 2028–2030, Stage 3 first CO2 injection 2030), the Danish Nordic Storage Hub, and the wider continental commercial-scale CCUS transport architecture. The Northern Purpose entry into service is a structural signal of continued

Norwegian commercial-scale CCUS commercial-scale infrastructure commitment and complements the parallel Aker Solutions second-generation Norwegian CCS construction start.

Germany $5.7 bn CCS CCfD and Denmark $2.55 bn Aalborg Portland — Continued Continental CCUS Backbone (Carry-Over)

Germany's $5.7 bn Carbon Contracts for Difference programme (launched May 2026) continues to underpin continental commercial-scale CCUS commercial-scale delivery, alongside Denmark's $2.55 bn Aalborg Portland CCS contract with the Danish Energy Agency (the largest recent state-backed carbon capture commitment in Europe). ExxonMobil and Shell continue to pursue divergent CCS strategies, with ExxonMobil emphasising commercial-scale US Gulf Coast delivery via Denbury and Shell emphasising continental commercial-scale European delivery via Porthos and Aramis (Netherlands). Structural NES Tier 2/3 engagement continues around Northern Lights JV (Bergen), Aker Solutions (Fornebu), Aramis (Netherlands), the Aalborg Portland CCS project, the German BMWK, the Danish Energy Agency, and the wider continental commercial-scale CCUS pipeline through 2028–2030.

5. Marine Energy

The week to 8 August 2026 was quiet for continental European marine-energy news, reflecting the wider summer procurement lull. Structural procurement engagement continues around the parallel CorPower Ocean world-first DNV Prototype Certificate for the C4 WEC (21 July, first industrial certification for a wave energy converter), the 10 MW VianaWave commercial extension in Portugal, the 5 MW Valiant EMEC array at Orkney (Scotland), CorPower's next-generation C5 development (targeting full DNV type certification and commercial readiness by 2027), and Norway Tidal Sails's advancement of marine tidal energy in partnership with an earth-science research centre. The September 2026 CEF Energy call and OPEN SEA demonstrator call remain the principal European commercial-scale procurement vehicles for wave and tidal engagement through H2 2026. Structural NES Tier 2/3 engagement continues around CorPower Ocean (Stockholm / Viana do Castelo), Ocean Energy Europe, Tidal Sails (Stavanger), Principle Power, Ecocean, EMEC (Orkney) and the European Commission for wave and tidal foundation engineering, dynamic mooring, dynamic cabling, marine warranty, offshore commissioning and integrated ocean-energy services.

6. Hydropower

ANDRITZ Vouglans / Saut-Mortier (France) 17 MW Variable-Speed Pump Turbine — Ongoing Implementation

ANDRITZ's 17 MW variable-speed pump-turbine order at Vouglans / Saut-Mortier in eastern France (award 20 July, execution 2026–2031) continues into implementation, with 80–85 MW of capacity added and storage capacity lifted from 50 to 250 GWh across the Ain river cascade. The Vouglans / Saut-Mortier project is one of the principal continental commercial-scale French pumped-storage modernisation projects of 2026 and consolidates ANDRITZ (Graz) as one of the principal continental commercial-scale hydropower equipment suppliers alongside Voith, GE Vernova and Sulzer. The ongoing implementation is a structural signal of continued French commercial-scale pumped-storage commercial-scale modernisation commitment and complements the parallel ANDRITZ ENGIE / Movhera Picote I award (Portugal, 3 x 72 MW Francis runners, Douro cascade, end-2030 completion), the Voith Torrejon Spain Iberdrola 2 x 43 MW pump-turbines follow-on award (previous window), the Spanish BORALMAC II €165 m 2 GW pumped-hydro awards (previous windows), the Serbia-Romania Iron Gates 3 MoU (previous window), and the wider continental commercial-scale hydropower commercial-scale modernisation pipeline.

> NES SALES OPPORTUNITY
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> **ANDRITZ Vouglans / Saut-Mortier 17 MW Variable-Speed Pump Turbine — French Commercial-Scale Hydropower Engineering Procurement Window**
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> NES Tier 2/3 suppliers in hydropower Francis and pump-turbine engineering, penstock design, hydro control systems, transformer supply, HV commissioning, mechanical completion, marine warranty and integrated hydro modernisation services should engage ANDRITZ (Graz), EDF Hydraulique (Grenoble), and the French Ministry for the Energy Transition. The Vouglans / Saut-Mortier award opens the multi-year commercial-scale French hydropower modernisation procurement engagement window through 2031.

EDP 1H26 Guidance Raise (Carry-Over) — Hydro 19% Above Average, Pumped-Storage EBITDA €48/MWh, 5% Group EBITDA Growth

EDP (Energias de Portugal) confirmed a raise to its 2026 guidance on the back of hydro output 19% above the long-term average and pumped-storage EBITDA of €48/MWh, delivering 5% group EBITDA growth in 1H26. The EDP guidance raise consolidates EDP (Lisbon / Porto) as one of the principal continental commercial-scale Iberian hydropower operators alongside Iberdrola (Bilbao), Endesa (Madrid), Naturgy (Madrid), Verbund (Vienna), Statkraft (Oslo) and Vattenfall (Solna). Structural NES Tier 2/3 engagement continues around EDP, Iberdrola, ANDRITZ, Voith, GE Vernova and Sulzer for hydro Francis runner and pump-turbine engineering, penstock design, HV commissioning and integrated hydro modernisation services across the Iberian and wider continental hydropower pipeline.

Serbia Djerdap 1 Output Falls to One-Third (Carry-Over) — Heatwave and Drought on Danube

Output at Serbia's largest hydropower plant Djerdap 1 has fallen to approximately one-third of nominal capacity due to low Danube water levels caused by the July heatwave and drought (Reuters, 25 July). The Djerdap 1 output collapse is a structural signal of continued climate-related risk to continental commercial-scale hydropower commercial-scale operational continuity and reinforces the strategic case for Iron Gates 3 (Serbia-Romania, MoU 16 July) and other continental commercial-scale Southeast European hydropower commercial-scale capacity additions. Structural NES Tier 2/3 engagement continues around EPS (Elektroprivreda Srbije), Hidroelectrica (Romania), and wider continental commercial-scale Southeast European hydropower commercial-scale operators for hydro Francis runner refurbishment, pump-turbine engineering, low-flow adaptation, HV commissioning, and integrated hydro modernisation services.

7. Geothermal

GIGA-M Confirms Largest 3D Seismic Survey in Munich Metropolitan History (Late August 2026) — 1,100 km2 Across Five Bavarian Districts

The GIGA-M consortium (Technische Universitat Munchen / TUM, Stadtwerke Munchen / SWM, Erdwarme Grunwald / EWG, City of Munich, Stadtwerke Furstenfeldbruck, Stadtwerke Bad Toelz) confirmed the largest 3D seismic survey in Munich metropolitan history for late August 2026 through

November. The survey covers 1,100 km2 across five Bavarian districts: Munich, Bad Toelz-Wolfratshausen, Miesbach, Starnberg and Furstenfeldbruck. It uses vibroseis trucks and geophones to map the deep-geothermal reservoir to 5 km depth. The GIGA-M campaign is the largest single deep-geothermal reservoir characterisation programme in Bavarian history and consolidates the Munich district-heating basin as one of the principal continental commercial-scale European deep-geothermal reservoir-development destinations alongside the Upper Rhine Graben (URG) and the Netherlands. The GIGA-M campaign is a structural signal of continued continental commercial-scale Bavarian commercial-scale deep-geothermal commercial-scale infrastructure commitment and complements the parallel Daldrup & Sohne Aschheim two additional deep-geothermal wells award, the Vulcan Energy Lionheart 30 MW civil construction start at Landau, the RheinEnergie 150 MW Cologne-Niehl river-water heat-pump cornerstone, the GD NRW Koln-Dellbruck 1,000 m Massenkalk research well, and the wider continental commercial-scale German commercial-scale deep-geothermal commercial-scale district-heating pipeline.

NES SALES OPPORTUNITY

GIGA-M 3D Seismic Survey — Bavarian Deep-Geothermal Reservoir Development Engineering Procurement Window

NES Tier 2/3 suppliers in deep-geothermal well engineering, 3D seismic acquisition and processing, downhole pumps, high-temperature ORC turbine BoP, brine handling, cathodic protection, corrosion management, geothermal district-heating design and integrated deep-geothermal services should engage the GIGA-M consortium (TUM Munich, Stadtwerke Munchen, Erdwarme Grunwald, City of Munich, Stadtwerke Furstenfeldbruck, Stadtwerke Bad Toelz), the Bavarian State Ministry of Economic Affairs (Munich) and Federal BMWK (Berlin). The GIGA-M campaign opens the immediate multi-year continental commercial-scale Bavarian deep-geothermal commercial-scale engineering procurement engagement window through 2028–2030 and beyond.

Daldrup & Sohne Wins Contract for Two Additional Deep-Geothermal Wells at Aschheim (Munich) — 3,700 m TD, Drilling from Late 2026 to Mid-2027

Daldrup & Sohne confirmed a contract award for two additional deep-geothermal wells at Aschheim near Munich. The wells will be drilled to 3,700 m target depth, with drilling from late 2026 to mid-2027, extending the Aschheim district-heating geothermal capacity. Daldrup & Sohne (Ascheberg, Nordrhein-Westfalen) has confirmed the immediate multi-year Bavarian deep-geothermal district-heating well engineering commitment. The Aschheim wells are one of the principal continental commercial-scale German deep-geothermal commercial-scale district-heating well engineering awards of Q3 2026 and consolidate Daldrup & Sohne alongside Kellner Beteiligungs GmbH (Munich), Deutsche ErdWarme, Geothermie Neubrandenburg, GeoTHERM and Neptun Deep Energy as one of the principal continental commercial-scale German commercial-scale deep-geothermal commercial-scale well engineering contractors.

NES SALES OPPORTUNITY

Daldrup Aschheim Two Deep-Geothermal Wells — Bavarian Commercial-Scale Deep-Geothermal Well Engineering Procurement Window

NES Tier 2/3 suppliers in deep-geothermal well engineering, casing supply, drilling mud engineering, downhole pumps, cathodic protection, corrosion management, high-temperature completion

> equipment, geothermal district-heating design and integrated deep-geothermal services should engage Daldrup & Sohne (Ascheberg), Aschheim municipality and the Bavarian State Ministry of Economic Affairs. The award opens the immediate structural German commercial-scale deep-geothermal commercial-scale well engineering procurement engagement window through mid-2027 completion.

Vulcan Energy Lionheart LSC-2 Reaches 3,000 m Target Depth (Carry-Over) — Landau, Germany, €2.2 bn Financing Closed

Vulcan Energy Resources's Lionheart 30 MW deep-geothermal project at Landau in Germany continues civil construction and drilling activity, with LSC-2 (Lionheart Seismic Core 2) recently reaching 3,000 m target depth. The Lionheart project has €2.2 bn of financing closed, its seventh well spudded, and a Siemens supply agreement is in place for the geothermal turbine equipment. Vulcan Energy Resources (Perth / Karlsruhe) consolidates its position as one of the principal continental commercial-scale Upper Rhine Graben (URG) deep-geothermal commercial-scale developers alongside Deutsche ErdWarme, Geothermie Neubrandenburg, GeoTHERM, Daldrup and Neptun Deep Energy. The ongoing Lionheart delivery consolidates the wider continental commercial-scale German deep-geothermal commercial-scale district-heating pipeline.

RheinEnergie Cologne-Niehl 150 MW River-Water Heat Pump (Carry-Over)

RheinEnergie's 150 MW Cologne-Niehl river-water heat pump construction (cornerstone laid 23 July) continues into implementation, at an estimated total cost of €280 m and 2028 operations targeted. The plant will be Europe's largest river-water heat pump and will supply 50,000 households in Cologne. Structural NES Tier 2/3 engagement continues around RheinEnergie (Cologne), Vattenfall (Berlin / Solna), E.ON (Essen), Stadtwerke Munchen (Munich), Uniper (Dusseldorf), Fortum (Espoo) and the wider continental commercial-scale European heat-pump developer architecture, as well as the parallel Vulcan Energy Lionheart, GIGA-M Munich reservoir characterisation, Daldrup Aschheim wells, and the wider continental commercial-scale continental European district-heating and heat-pump commercial-scale infrastructure pipeline.

8. Decommissioning & Norwegian Continental Shelf

AF Gruppen (AF Offshore Decom) and Heerema Marine Contractors Secure Second UKCS Platform-Removal Engineering Contract

AF Gruppen (via its AF Offshore Decom division at Vats yard in Norway) and Heerema Marine Contractors (Leiden, Netherlands) confirmed a second UKCS platform-removal engineering contract in July 2026, replicating the February 2026 first EPRD (Engineering, Preparation, Removal, Disposal) award to the consortium. The second UKCS platform-removal engineering contract is one of the principal continental commercial-scale cross-border UKCS decommissioning commercial-scale awards of Q3 2026 and consolidates AF Gruppen (Oslo) and Heerema Marine Contractors (Leiden) as the principal Norwegian-Dutch decommissioning consortium alongside DeepOcean, TechnipFMC, Aker Solutions, Subsea7 and Saipem. The second UKCS award is a structural signal of continued cross-border commercial-scale UKCS decommissioning commercial-scale delivery and consolidates the AF Gruppen / Heerema consortium as the principal continental commercial-scale UKCS platform-removal engineering delivery vehicle. While the physical work is UKCS-anchored, the operator dominance is Norwegian and Dutch and the award qualifies as cross-border non-UK-dominant news.

NES SALES OPPORTUNITY

AF Gruppen / Heerema Second UKCS Platform-Removal EPRD — Cross-Border Commercial-Scale UKCS Decommissioning Engineering Procurement Window

NES Tier 2/3 suppliers in UKCS platform removal engineering, well plug and abandonment, subsea intervention, ROV inspection, marine warranty, dive support, subsea installation support, environmental monitoring, integrated topside services, secondary steel and integrated decommissioning services should engage AF Gruppen (Oslo / Vats), AF Offshore Decom (Vats yard), Heerema Marine Contractors (Leiden), and UKCS decommissioning operators. The July 2026 second UKCS EPRD award opens the immediate multi-year structural continental commercial-scale UKCS decommissioning commercial-scale engineering procurement engagement window through 2028–2030.

Aker BP Q2 2026 (Carry-Over) — Record $3.1 bn Operating Cash Flow, 383.6 kboepd Production, 35% Production Growth Through 2028

Aker BP's Q2 2026 results (published 14 July, briefed in this week's window with follow-through activity) delivered record $3.1 bn operating cash flow, 383.6 kboepd production, $1.33 bn free cash flow and a $418 m quarterly dividend. Aker BP's production growth guidance through 2028 targets approximately 35% growth to approximately 525,000 boepd, driven by Yggdrasil (approximately 450 mmboe net), Valhall PWP-Fenris (approximately 220 mmboe net) and Skarv Satellites (August 2026 start-up). Total Yggdrasil investment is now estimated at $12.5–13 bn net before tax, with the Valhall PWP-Fenris cost also raised to support the 2027 schedule delivery. The Aker BP Q2 2026 results are a structural signal of continued NCS commercial-scale independent E&P delivery capability and complement the parallel Vår Energi / Kistos Balder Next New Wells FID (29 July, Balder FPU decommissioning from 2028), the Equinor Q2 2026 results ($11.48 bn adjusted operating income, 2,165 mboepd production, $1,125 m Q3 buy-back tranche), the TechnipFMC $250–500 m Equinor NCS brownfield quartet (Omega Sor, Brime, Tyrihans Nord, TWIN rigid pipelay), and the wider NCS commercial-scale capacity-extension and decommissioning pipeline.

Vor Energi H1 2026 Results (Carry-Over) — 391 kboe/d, 390–410 Full-Year Guidance, H2 2026 Drilling Push at Balder / Gjoa

Var Energi's H1 2026 results confirmed 391 kboe/d production and reaffirmed full-year 2026 guidance of 390–410 kboe/d. The H2 2026 drilling push at Balder and Gjoa is a structural signal of continued NCS commercial-scale independent E&P delivery and complements the parallel Vår Energi / Kistos Balder Next New Wells FID (29 July), the Vår Energi / BlueNord merger (previous window), the Equinor Q2 2026 results, and the wider NCS commercial-scale operator commercial-scale delivery capability. Structural NES Tier 2/3 engagement continues around Vår Energi (Sandnes), Aker BP (Fornebu), Equinor (Stavanger), TechnipFMC, Aker Solutions, DeepOcean, Subsea7 and the wider NCS commercial-scale supply chain for FPU decommissioning engineering, subsea well plug and abandonment, subsea intervention, ROV inspection and integrated decommissioning services.

TechnipFMC $250–500m Equinor NCS Brownfield Quartet and Vor Energi 5-Year Direct Framework (Carry-Over)

TechnipFMC's $250–500 m Equinor NCS brownfield subsea contracts (Omega Sor, Brime, Tyrihans Nord subsea developments plus a TWIN rigid pipelay campaign) and 5-year direct-award commercial-scale Vår Energi framework agreement with $2.5 bn of Q2 2026 subsea orders overall continue to underpin NCS commercial-scale subsea commercial-scale delivery through H2 2026 and into 2027-2030. Structural NES Tier 2/3 engagement continues around TechnipFMC (Houston / Paris / Oslo), Equinor (Stavanger), Vår Energi (Sandnes), Aker Solutions (Fornebu) for subsea intervention, ROV inspection, marine warranty, secondary steel, subsea trees, umbilicals, subsea installation support, environmental monitoring, integrated topside services and rigid pipelay support.

9. Industry & Policy

Saipem — Subsea7 Clear US HSR Antitrust Review (31 July, Announced 3 August) — EC Phase II Extended to 16 December 2026

On 31 July, Saipem and Subsea7 confirmed the expiry of the US Hart-Scott-Rodino Act antitrust waiting period, with the announcement made on 3 August 2026. US closure of the merger is now unconditional. The European Commission Phase II merger review deadline was extended by 14 working days to 16 December 2026 (from 26 November) at the parties' request to allow further remedy discussions with DG Competition. The Australian Competition and Consumer Commission (ACCC) review continues in Phase 2, with a decision expected in Q4 2026. The Saipem-Subsea7 merger, once cleared, will create a NOK 200 bn+ subsea engineering contractor with combined subsea backlog of approximately €43 bn as of Q2 2026, headquartered in London and Milan. The merger is one of the principal continental commercial-scale European subsea M&A events of 2026 and consolidates the emerging Saipem-Subsea7 combined entity as the principal continental commercial-scale European subsea EPC contractor alongside TechnipFMC, Aker Solutions and Baker Hughes. Structural NES Tier 2/3 engagement continues around Saipem (Milan), Subsea7 (Sutton / Oslo), the European Commission DG COMP, the US Federal Trade Commission, the US Department of Justice and the Australian ACCC.

> NES SALES OPPORTUNITY
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> **Saipem — Subsea7 Merger US Clearance / EC Phase II 16 December — Continental Commercial-Scale Subsea M&A Procurement Window**
>
> NES Tier 2/3 suppliers in subsea intervention, ROV inspection, subsea trees, umbilicals, rigid pipelay support, marine warranty, offshore commissioning, mechanical completion, environmental monitoring and integrated subsea services should engage Saipem (Milan), Subsea7 (Sutton / Oslo), the European Commission DG COMP (Brussels), the US FTC and DoJ (Washington DC) and the Australian ACCC (Melbourne). The 31 July / 3 August US HSR clearance and 16 December EC Phase II deadline open the immediate multi-year continental commercial-scale European subsea M&A commercial-scale procurement engagement window through H1 2027 completion.

Italy FER Permitting Portal (Carry-Over) — Mandatory Under MASE Decree 21 July No. 181

Italy's FER Permitting Portal (operational from 31 July as the mandatory route for renewables authorisation applications under MASE Decree 21 July no. 181) continues to underpin Italian commercial-scale renewables commercial-scale permitting acceleration. Structural NES Tier 2/3 engagement continues around MASE (Ministero dell'Ambiente e della Sicurezza Energetica), the Italian Renewable Energy Association (ANIE) and Italian renewables developers for permitting support, environmental assessment, grid connection engineering, HV commissioning and integrated renewables authorisation services.

Acciona Energia 361 MW Spanish Wind Portfolio Sale to Galp (Carry-Over) — €420 m Deal

Acciona Energia's 27 July confirmed sale of a 361 MW Spanish wind portfolio to Galp for €420 m ($478.8 m) continues to underpin Iberian commercial-scale wind commercial-scale M&A. Structural NES Tier 2/3 engagement continues around Galp (Lisbon), Acciona Energia (Alcobendas), Iberdrola (Bilbao), EDP (Lisbon / Porto), Endesa (Madrid), Naturgy (Madrid) and Repsol (Madrid) as the principal continental commercial-scale Iberian wind commercial-scale operator architecture.

EIB €260 m TAURON 190 MW Poland Onshore Wind Loan (Carry-Over)

The European Investment Bank's 29 July confirmed €260 m loan to TAURON for Poland's second-largest wind farm (190 MW onshore) continues to underpin continental commercial-scale Central European commercial-scale wind commercial-scale financing capability. Structural NES Tier 2/3 engagement continues around the EIB (Luxembourg), the EBRD (London), NEFCO (Helsinki), KfW (Frankfurt), BPI France (Maisons-Alfort) and TAURON (Katowice) as the principal continental commercial-scale Central European commercial-scale onshore wind commercial-scale financing architecture.

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	Vattenfall Denmark 1.8 GW two-sided CfD tender — Hesselo 800 MW @ DKK 542/MWh, Nordsoen Midt 1 GW @ DKK 504/MWh; 20-year contracts; completion by 2032	Fixed-Bottom Wind	Vattenfall, Danish Energy Agency	Award 4 August; execution to 2032	HIGH
2	Saipem — Subsea7 merger — US HSR cleared 31 July; EC Phase II deadline 16 December 2026; ACCC review continues; combined €43 bn subsea backlog	Subsea / M&A	Saipem, Subsea7, EC DG COMP, US FTC/DoJ, Australian ACCC	US clear 31 July; EC 16 December	HIGH
3	Aker Solutions second-generation Norwegian CCS construction start — Hafslund Celsio Klemetsrud (350 kt CO_2/yr) and Northern Lights Phase 2 (5 Mt CO_2/yr by 2028)	CCUS	Aker Solutions, Hafslund Celsio, Northern Lights JV, Equinor, TotalEnergies, Shell	Construction start Q2 2026; Phase 2 from 2028	HIGH
4	Northern Lights Northern Purpose LCO_2 fourth carrier in service — Dalian Shipbuilding; Phase 1 CCS fleet complete; Yara NL, Orsted DK, Stockholm Exergi	CCUS	Northern Lights JV (Equinor / TotalEnergies / Shell), Yara, Orsted, Stockholm Exergi	In service 29 July / August; Phase 2 2028	HIGH
5	TechnipFMC $250–500 m Equinor NCS brownfield quartet + Vår Energi 5-yr direct framework — Omega Sor, Brime, Tyrihans Nord, TWIN rigid pipelay	Decom / NCS / Subsea	TechnipFMC, Equinor, Vår Energi, Aker Solutions	Awards Q2 2026; execution 2026–2030	HIGH

6	AF Gruppen / Heerema second UKCS platform-removal EPRD contract — replicates February 2026 award; Norwegian-Dutch consortium dominant	Decom / NCS	AF Gruppen (AF Offshore Decom), Heerema Marine Contractors	Award July 2026; execution 2026–2030	**MEDIUM**
7	GIGA-M Munich 3D seismic survey — 1,100 km2 across five Bavarian districts; late August 2026 to November; deep-geothermal reservoir mapping to 5 km	Geothermal	TUM Munich, Stadtwerke Munchen, EWG, City of Munich, Stadtwerke Furstenfeldbruck, Stadtwerke Bad Toelz	Campaign late August 2026 to November	**MEDIUM**
8	Daldrup & Sohne Aschheim two additional deep-geothermal wells — 3,700 m TD; drilling late 2026 to mid-2027; Munich district-heating extension	Geothermal	Daldrup & Sohne, Aschheim municipality, Bavarian State Ministry of Economic Affairs	Drilling late 2026 to mid-2027	**MEDIUM**
9	ANDRITZ Vouglans / Saut-Mortier 17 MW variable-speed pump turbine — France; 80–85 MW added; storage 50→250 GWh; execution 2026–2031	Hydropower	ANDRITZ, EDF Hydraulique	Award 20 July; execution to 2031	**MEDIUM**
10	Poland West Pomerania offshore-wind hub — Swinoujscie 70% booked; Windar Renovables Szczecin 450 jobs; Baltic consolidation	Fixed-Bottom Wind / Ports	Swinoujscie Offshore Terminal, Windar Renovables, Vestas Poland, Orlen, Northland Power	Hub consolidation into 2027–2028	**LOW-MED**

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