ENERGY TRANSITION WEEKLY - GLOBAL EDITION

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Welcome to Volume 2 of Energy Transition Weekly—your essential intelligence briefing on offshore wind, hydrogen, CCUS, decommissioning and renewables developments shaping the global low-carbon energy transition.

EDITOR'S BRIEF

This week's headline: The Trump administration's indefinite suspension of five major US offshore wind projects on 22 December has triggered legal action from developers, while simultaneously South Korea marks its entry into utility-scale offshore wind development with landmark Vestas contracts. Global floating offshore wind remains constrained by capital requirements, yet Asia-Pacific expands rapidly, signaling a bifurcated energy transition landscape: US retrenchment versus international acceleration.

One critical number: 390 MW—Vestas's first South Korean offshore order (26 V236-15.0 MW turbines), marking the world's most advanced offshore turbine technology now deployed in Asia's burgeoning offshore sector, with commercial operations forecast 2028.

Action for this week: Monitor US offshore wind court decisions (hearing set 9 January for Coastal Virginia Offshore Wind); track Asian offshore wind contract awards and supply chain implications for European turbine manufacturers; assess global decommissioning acceleration in North Sea and reassess energy transition timelines given US policy uncertainty.

1. US OFFSHORE WIND UNDER SIEGE: LEGAL BATTLES COMMENCE

Trump Administration Suspends Five Projects (22 December), Developers Respond (1-2 January)

The Trump administration issued suspension orders affecting five major offshore wind projects along the US Atlantic Coast, citing vague "national security" concerns related to radar interference. The order halted construction on:

- **Revolution Wind** (Rhode Island) – 87% complete, 58 of 65 turbines installed, scheduled for January 2026 power delivery
- **Empire Wind** (New York) – 60% complete, 500,000 homes to be serviced
- **Sunrise Wind** (New York) – under development by Orsted subsidiary
- **Coastal Virginia Offshore Wind** (Virginia) – largest of the five projects, incurring $5 million daily losses
- **Vineyard Wind 1** (Massachusetts) – 50% operational with 31 of 62 turbines generating power

Legal response accelerates (1-2 January):

Orsted and Skyborn Renewables filed suit on 1 January challenging Revolution Wind suspension, seeking preliminary injunction to resume work while litigation proceeds. Company statement: "Revolution Wind has spent and committed billions of dollars in reliance upon, and has met the requests of, a thorough review process."

Equinor filed civil suit 2 January for Empire Wind, claiming the Interior Department's Bureau of Ocean Energy Management directed cessation "without substantial explanation" and alleging the administration had classified security reports "for over a month" prior to sudden reversal.

Dominion Energy previously filed suit (23 December) regarding Coastal Virginia Offshore Wind, arguing "immediate, irreparable harm" with $5 million daily losses. Court hearing set for 9 January.

Investment at stake: Approximately $25 billion across five projects, with anticipated 10,000 jobs and power supply to 1.5+ million homes.

Industry assessment: Orsted's shares have plunged 35% over 2025 due to Trump administration hostility. The administration's classification of security threats while providing no substantive explanation to developers or Congress signals political rather than genuine security motivation. Senator Jack Reed (D-RI) noted contacting Deputy Secretary of Defense for clarity, only to learn information was classified: "Which means we don't have a reason; we simply want to proceed."

Global implications: US offshore wind faces potential 10-year delay to reestablish investor confidence once Trump administration uncertainty resolves, according to energy analysts. European manufacturers may pivot supply chains away from US market, redirecting capacity to Asia-Pacific and European projects with more stable policy environments.

2. GLOBAL OFFSHORE WIND ACCELERATES: ASIA-PACIFIC ADVANCES

South Korea Enters Utility-Scale Offshore Wind: Vestas Secures 390 MW (30 December)

Vestas announced 390 MW order for **Shinan-Ui offshore wind project** in Jeollanam Province, South Korea—marking the company's first offshore wind contract in the country. Project details:

- **26 V236-15.0 MW turbines** (world's most advanced offshore platform, type-certified 2023, 9+ GW firm orders globally)
- **Consortium leadership:** Hanwha Ocean, SK Eternix, KOMIPO (Korea Midland Power), Future Energy Fund, Hyundai Engineering & Construction
- **Scope:** Turbine supply + 20-year service agreement, full global standards implementation including installation vessels, offshore transformers, grid connection systems, and integrated local supply chain
- **Timeline:** Deliveries commence 2027; commercial operations 2028
- **Capacity:** Will generate critical baseload power for South Korea's grid with growing data centre and AI demand

Concurrent South Korean award: Vestas also secured 43 MW onshore order (Gokseong Green Wind Power Project, 7 V162-6.2 MW turbines, delivery 2027, commissioning 2028).

Strategic significance: South Korea's official entry into utility-scale offshore wind represents:

- Regional precedent-setting for global standards adoption in Asia-Pacific
- Demonstrated demand for next-generation 15+ MW turbines in offshore-constrained markets
- Supply chain acceleration across foundations, cables, electrical components, and installation services
- Competitive market opening as Asian operators challenge European dominance

For supply chain: Manufacturers and contractors providing foundations, subsea cabling, electrical systems, and installation support should prioritize Korean project engagement, as consortium has committed to robust local supply chain integration.

Germany's Offshore Decommissioning Launches: Vattenfall Pioneering Dismantling (28 December)

Vattenfall launched pioneering decommissioning project for German offshore wind farm, with contract scope including foundation removal. Decommissioning timeline reflects broader North Sea reality: wind farms operational 20-35 years now entering end-of-life phase 2025-2045, creating sustained demand for subsea removal, jacket cutting, and materials handling.

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3. UK NORTH SEA DECOMMISSIONING ACCELERATES

Winter 2025-26 Campaign Underway: Multiple Operations in Progress

Ongoing heavy-lift operations:

- **Amethyst B1D jacket removal:** OBANA heavy-lift vessel arrived 30 December 2025, scheduled departure 31 January 2026
- **Amethyst A2D jacket removal:** Operations completed 5 January 2026
- **Trent field:** ERDA jack-up barge executing well plug & abandonment with pipeline flushing (hydrocarbon safety focus)
- **Sean Papa platform:** Swift 10 MODU contracted for ~120 days of well P&A work (decommissioning phase)
- **Western Isles subsea infrastructure:** Risers, manifolds, mid-water arches recovery scheduled Spring 2026 (guard vessel maintaining presence over winter)

Northern Endurance Partnership PAM survey: Passive Acoustic Monitoring stations serviced 8 January 2026 for continued environmental compliance during CCUS development phase.

Supply chain opportunities: Vessel availability, conductor cutting, sectioning, subsea services, concrete mattress/rock filter installation (Perenco UK campaign, pipeline remediation, PL22-PL450 assets, 11 December 2025 – 7 January 2026).

Market context: UK decommissioning backlog (~500+ wells overdue per NSTA) remains acute. Decommissioning may exceed CapEx spending by 2028, driving multi-billion-pound supply chain demand through 2030s.

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4. HYDROGEN INFRASTRUCTURE: REGIONAL MOMENTUM BUILDING

AquaVentus Calls for Offshore Hydrogen Framework (January 2026)

AquaVentus industry group called for increased government investment support and regulatory clarity for offshore wind-hydrogen integration, requesting expedited WindSeeG (German offshore wind law) reform enabling hybrid electricity-hydrogen pipelines.

Policy momentum: German and European regulators now prioritizing combined offshore wind/hydrogen cable-pipeline corridors to maximize offshore platform productivity and reduce marine footprint—critical enabling framework for 2030-2035 hydrogen production scaling.

Supply chain implications: Integrated pipeline-cable designs require specialized engineering for hybrid subsea infrastructure (hydrogen-compatible materials, corrosion control, separation systems). Early qualification with major contractors (Worley, TechnipFMC) essential for supply chain positioning.

Project Union Hydrogen Pipeline: St Fergus-Teesside Corridor Confirmed

Ofgem confirmed £164 million Front-End Engineering Design (FEED) funding for three National Gas hydrogen transmission projects, including critical St Fergus (Scotland) to Teesside (England) hydrogen corridor (announced November 2025, continued momentum into 2026).

Project timeline: FEED studies underway; construction 2027-2030; operational capacity to connect Scottish green/blue hydrogen production with demand centres in Teesside, HyNet North West, and Grangemouth.

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5. CHINA'S OFFSHORE WIND EXPANSION: COMPETITIVE THREAT EMERGES

China Leads Global Offshore Turbine Capacity Deployment

China continued 2025 dominance in single-unit offshore turbine capacity, with Dongfang and CSIC deploying units exceeding 15 MW capability. Mingyang Smart Energy unveiled 50 MW floating offshore wind turbine design (twin-head concept) for 2027+ deployment.

European concern escalating: The Economist (30 December) reported rising UK/EU concern over Chinese offshore wind equipment quality and national security implications—potential espionage risk via wind farm data/monitoring systems targeting naval operations.

Supply chain displacement risk: Chinese manufacturers' cost advantage (30-40% lower than European producers) and scaling production may capture 40%+ of global floating offshore wind orders by 2028, constraining demand for European suppliers facing constrained US market.

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6. GLOBAL DECOMMISSIONING MARKET DYNAMICS

North Sea P&A and Subsea Infrastructure Removal Intensifying

The North Sea decommissioning phase is now entering full acceleration, with UK operations (Amethyst, Trent, Sean Papa, Western Isles) joined by planned German dismantling (Vattenfall project).

OEUK context (November 2025 report, continued momentum): Decommissioning targets require 300 wells/year vs. 103-124 completed annually; 500+ wells overdue for plugging. Cost trajectory suggests decommissioning spending may reach £20-25 billion cumulatively through 2040.

Service demand drivers:

- Well plug & abandonment (largest cost component)
- Subsea infrastructure removal (95,000+ tonnes planned, 883 km pipelines)
- Jacket removal and topside recycling
- Onshore recycling and waste management
- Environmental compliance and monitoring

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7. FLOATING OFFSHORE WIND MARKET REALITY

RenewableUK Pipeline Report Context: Only ~2.5 GW Operational by 2030 Despite 221 GW Under Development

Market concentration evident: fewer, larger developers winning capacity. Shell's recent pivot away from offshore renewables (back to oil & gas focus) exemplifies sector selectivity. UK forecast to capture ~1 GW (41% of global 2.5 GW 2030 target) from ScotWind projects and pre-commercial sites.

Market lesson: Floating wind is capital-intensive and timeline-slippery. Supply chain focus should prioritize developers with secured CfD support, active FEED contracts, and visible FID timelines within 12-18 months—not 2027-2030 aspirations.

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8. GLOBAL ENERGY POLICY OUTLOOK

US Policy Uncertainty Versus International Acceleration

Bifurcated market emerging:

US retrenchment: Trump administration's offshore wind suspension, fossil fuel emphasis, and renewable energy policy rollback creates 10-year investor confidence gap. Offshore wind developers face legal battles, project delays, and supply chain redirection.

International acceleration: South Korea entering offshore wind market, UK North Sea decommissioning accelerating, Germany advancing offshore hydrogen integration, Asia-Pacific expanding floating wind development, China scaling production capacity.

Supply chain redistribution: European offshore wind manufacturers (Vestas, Siemens Gamesa, Orsted, Equinor) increasingly dependent on non-US markets (Europe, Asia-Pacific, emerging markets) for growth, reducing US market significance to <10% of future turbine deployments by 2030.

KEY ANNOUNCEMENTS THIS WEEK

- **Orsted/Skyborn**: Revolution Wind legal challenge filed (1 January 2026); 87% complete, facing January 2026 power delivery target under suspension

- **Equinor**: Empire Wind legal challenge filed (2 January 2026); $4 billion+ invested, 60% complete
- **Vestas**: 390 MW South Korean offshore order (30 December); 26 V236-15.0 MW turbines, 2028 commissioning
- **UK decommissioning:** Amethyst B1D, A2D, Trent, Sean Papa operations in progress (December 2025-January 2026)
- **Vattenfall**: German offshore wind farm decommissioning launched; pioneering dismantling methodology
- **AquaVentus**: Called for offshore hydrogen pipeline-cable integration framework (January 2026)

SUPPLY CHAIN IMPLICATIONS

Immediate Opportunities (Q1-Q2 2026)

1. **North Sea vessel support:** Availability for ongoing jacket removal (OBANA, ERDA), conductor cutting, sectioning services
2. **Subsea infrastructure removal:** Specialized services for pipeline remediation, mattress installation (Perenco UK campaign)
3. **Korean offshore supply chain:** Foundations, subsea cables, electrical components, installation support for Shinan-Ui project (consortium approach signals priority for integrated supply chain)
4. **Hydrogen infrastructure FEED:** Engineering, design, and early procurement for hydrogen transmission networks (St Fergus corridor)

Medium-Term Shifts (2026-2027)

- US offshore wind supply chain contraction as projects indefinitely delayed
- Asian offshore wind supply chain expansion (South Korea, emerging ASEAN markets)
- Floating offshore wind consolidation around major developers with strong funding

- Decommissioning cost inflation as regulatory requirements tighten (jacket cutting depth, environmental compliance)

Strategic Watch Points

- **US court decisions** (preliminary injunctions expected January 9 and beyond): Will determine supply chain confidence in continued US offshore wind deployment
- **Asian turbine demand** (15+ MW offshore): Supply chain reallocation from constrained US to growing Asia-Pacific market
- **Decommissioning acceleration:** Continued North Sea operations will sustain service demand through 2030s
- **Policy stability:** European and UK energy policy continuity vs. US volatility will drive long-term supply chain investment decisions

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EVENTS & RESOURCES

- **Trump Administration Offshore Wind Suspension (22 December 2025):** Five projects halted; legal challenges filed 1-2 January 2026. Next court hearing 9 January (Coastal Virginia) and 23 January (preliminary injunction hearings expected)
- **Vestas South Korea Offshore Order (30 December 2025):** 390 MW Shinan-Ui project; first offshore contract in country; 2028 commissioning
- **North Sea Decommissioning Operations (December 2025-January 2026):** Amethyst, Trent, Sean Papa, Western Isles, Perenco pipeline campaigns underway
- **Vattenfall German Offshore Decommissioning Launch (28 December 2025):** Pioneering dismantling methodology
- **UK Government Energy Policy (November 2025):** Autumn Budget confirms £63 billion clean energy investment; decommissioning as priority sector through 2030

LOOKING AHEAD

Week of 6-12 January 2026:

- US offshore wind court decisions (Revolution Wind, Empire Wind preliminary injunction motions)
- Coastal Virginia Offshore Wind hearing (9 January)
- South Korean offshore wind supply chain announcements from Shinan-Ui consortium
- Continued North Sea decommissioning operations (weather permitting)

Anticipated announcements:

- OPRED final decommissioning guidance (Q1 2026) on jacket cutting depths and removal methodologies
- Asian offshore wind project FID announcements (Taiwan, Vietnam, Indonesia floating wind)
- UK hydrogen hub development updates (Aberdeen bp partnership, electrolyser procurements)
- European CCUS funding announcements and project timelines

EDITOR'S NOTE

Energy Transition Weekly: Global Edition is prepared for supply chain professionals, investors, and policymakers navigating the global low-carbon energy transition. The bifurcated energy landscape—US retrenchment versus international acceleration—creates both challenge and opportunity: established markets face policy uncertainty; emerging markets expand capacity and capability. Supply chain engagement should reflect this divergence: consolidate US hedges, expand Asia-Pacific positioning, maintain North Sea decommissioning focus through 2030s.

We welcome your intelligence, story suggestions, and supply chain insights. Contact us to feature your company's developments in future editions.

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