EXPORTCENTRAL AI · WEEKLY INTELLIGENCE

Europe Offshore

Low-Carbon Intelligence Briefing

Week Ending 13 June 2026 · Non-UK Europe · Prepared for North East Scotland Energy Supply Chain

IN THIS WEEK'S BRIEFING

Coverage: 7 – 13 June 2026. Sectors: offshore wind (fixed-bottom & floating), hydrogen, CCUS, marine energy, hydropower, geothermal, decommissioning, grid & policy.

Headlines: France launches its long-delayed AO10 mega-tender for almost 10 GW of fixed-bottom and floating offshore wind across 11 sites — the largest single offshore wind procurement programme ever organised in Europe — with bids due 12 October and awards expected February 2027; OGE, EBN, Eni Netherlands CCUS, Gasunie, Shell and TotalEnergies sign the Delta Rhine Corridor MoU for a cross-border Dutch-German CO_2 pipeline system feeding the Aramis offshore project (first segments operational 2032, full chain 2033, Aramis FID 2027, start 2030); Norway's parliament forces a financial-scrutiny review of the NKr35bn (~$3.7bn) Utsira Nord floating-wind subsidy — Equinor-Vårgrønn and Deep Wind Offshore-EDF Renouvelables consortia pause project work; Engie and European Energy launch 150 MW Kassø green-hydrogen cooperation (Aabenraa, Denmark, 2030); Everfuel €244.9m EU H_2 Bank award detail confirmed; RWE installs first turbine at the 1.6 GW Nordseecluster A off Juist; Cadeler completes 100-turbine installation campaign at Sofia (UK — noted only for European supply chain context); EU Commission launches Battery Booster Facility (€1.5bn) and "Unlock Your Power" consumer rights campaign; EGEC EUSEW policy session in Brussels (9 June) calls for stand-alone European Geothermal Action Plan; Eavor named No. 2 in TIME World's Top GreenTech Companies; first Spanish wave-energy buoy connects to grid at BiMEP; Equinor secures Tordis P&A consent (Havtil) for COSL Promoter; Aker Solutions wins Halten East subsea EPC from Equinor; OneSubsea EPC for Gullfaks subsea compression upgrade; TenneT awards Liebherr six RL 2600 offshore cranes for the Dutch 2 GW programme.

Executive Summary

The week to 13 June 2026 was dominated by two structural events that together reshape the procurement landscape for the next 12–18 months. First, on 11–12 June the French Energy Regulatory Commission (CRE) published the specifications for the long-awaited AO10 mega-tender, opening one of the largest single offshore wind procurement programmes ever organised in Europe: almost 10 GW split equally between five fixed-bottom projects (Normandy, Brittany, Atlantic) and seven floating projects (Atlantic and Mediterranean), with bids due 12 October 2026 and contract awards in February 2027. The tender combines the previously separate AO9 and AO10 rounds, sets a weighted-average ceiling of €100/MWh over 25 years under Contracts for Difference, and explicitly scores bidders on use of European manufacturers and minimisation of Chinese components — the first time French offshore tendering has applied an industrial-content scoring grid at this scale. Second, on 10 June EBN, Eni Netherlands CCUS, Gasunie, OGE (Open Grid Europe), Shell and TotalEnergies EP Nederland signed the Delta Rhine Corridor

MoU committing to build an interoperable, cross-border Dutch-German CO_2 pipeline system connecting North Rhine-Westphalia industrial clusters to Dutch North Sea storage via Aramis — first Dutch pipeline segments operational 2032, full chain by 2033, with Aramis FID still targeted 2027 and operation 2030.

The week's second structural signal was political. On 9 June the Norwegian Storting voted to require an external quality-assurance and socio-economic review of the NKr35bn (~$3.7bn) state subsidy programme for floating wind at Utsira Nord — the country's flagship offshore renewables programme. Opposition party Høyre proposed the review and was supported by Frp, KrF and Rødt, giving the four parties a working parliamentary majority against the minority government. The two pre-qualified consortia (Equinor-Vårgrønn under "Utsira Nord Havvind" and Deep Wind Offshore-EDF Renouvelables under "Harald Hårfagre") are required to wait until the QA exercise completes by H1 2027 before binding commitments can be entered. Equinor publicly described the development as "making an already challenging project even more difficult" and confirmed that project work continues but that implications cannot be ruled out. EDF Renouvelables' Norwegian partner Deep Wind Offshore (part of the Harald Hårfagre consortium) has paused finalisation of its project-specific environmental impact assessment. This is the single sharpest political setback to European floating wind in 2026 and a material risk-signal for the broader Nordic floating supply chain. Meanwhile NVE is running a parallel public hearing on the two Utsira Nord proposals until 18 June.

CCUS produced the strongest progress signals beyond Delta Rhine Corridor. The European Commission's 8 June update confirmed Project Greensand will move to first commercial CO_2 injection within weeks at Nini West, with Porthos commercial operation in 2027 and Prinos in 2026–2027 — putting three continental commercial CO_2 chains on the start-line of operations simultaneously. Hydrogen had a strong week too: Engie and European Energy on 9 June launched a cooperation agreement to develop a 150 MW renewable-hydrogen project at Aabenraa in Denmark near Kassø (commercial operation around 2030, supplying German industrial and mobility demand via the future Danish-German Hydrogen Backbone), and detail emerged on Everfuel's previously-announced €244.9m EU H_2 Bank award for its 200 MW Vejen project in Denmark. Argus reported that Germany committed over €1bn from its third European Hydrogen Bank allocation to support 78,000 t/yr of Danish renewable hydrogen production across three projects. Plug Power announced installation of GenEco units at Galp's Sines refinery in Portugal and a Hynetwork hydrogen-pipeline milestone in Rotterdam. In offshore wind, RWE installed the first turbine at the 1.6 GW Nordseecluster A off Juist on 10 June and Ecowende installed its first Vestas V236-15 at the 760 MW Hollandse Kust West VI project. In NCS subsea, Equinor cleared Tordis P&A (consent from Havtil for COSL Promoter), awarded Aker Solutions the Halten East subsea EPC, and contracted OneSubsea (SLB-Aker Solutions-Subsea7 JV) for the Gullfaks subsea compression upgrade. For North East Scotland the combined pattern is unmissable: French offshore wind (AO10) and Dutch-German CCUS (Delta Rhine Corridor + Aramis) are now the two largest single procurement geographies in Europe, both with their procurement clocks now running.

Headline Signals — Week Ending 13 June 2026

- France launches AO10 mega-tender for almost 10 GW of offshore wind across 11 sites (CRE specifications published 11–12 June): 5 GW fixed-bottom (4 projects: Fecamp-Grand-Large, Bretagne-Nord-Ouest, Bretagne-Sud, Oléron) and 5 GW floating (7 projects, Atlantic and Mediterranean including Golfe du Lion Centre and Golfe de Fos); bids due 12 October 2026;

awards February 2027; €100/MWh weighted-average ceiling over 25 years under CfD; explicit scoring of European-manufactured components and minimisation of Chinese content.

- Delta Rhine Corridor MoU signed by EBN, Eni Netherlands CCUS, Gasunie, OGE, Shell and TotalEnergies EP Nederland (10 June): cross-border Dutch-German CO_2 pipeline network connecting North Rhine-Westphalia industrial clusters to Dutch North Sea storage via Aramis; first Dutch pipeline segments operational 2032; full chain by 2033; Aramis FID still targeted 2027; Aramis operation 2030; ship-and-rail-based CO_2 infrastructure used until pipeline operational.
- Norwegian Storting forces external quality-assurance review of NKr35bn (~$3.7bn) Utsira Nord floating-wind subsidy programme (9 June): Høyre proposal supported by Frp, KrF and Rødt; both Equinor-Vårgrønn (Utsira Nord Havvind) and Deep Wind Offshore-EDF Renouvelables (Harald Hårfagre) consortia pause project work; QA must complete by H1 2027; Equinor warns "we cannot rule out implications"; sharpest political setback to European floating wind in 2026.
- Engie and European Energy launch 150 MW Kassø green-hydrogen cooperation in Aabenraa, Denmark (9 June): commercial operation around 2030; connects to future Danish-German Hydrogen Backbone; supplies German industrial and mobility demand; subsidised under Germany's hydrogen Auction-as-a-Service round (AaaS 25) linked to European Hydrogen Bank.
- Detail emerges on Everfuel €244.9m EU H_2 Bank award for 200 MW Vejen project, Denmark (announced earlier): largest single RFNBO award of EU H_2 Bank to date; part of Germany's €1bn-plus support to 78,000 t/yr Danish renewable hydrogen across three projects per Argus reporting; concentrates EU funding into Danish-German H_2 corridor.
- RWE installs first turbine at 1.6 GW Nordseecluster A off Juist (10–11 June): 44 Vestas turbines to be installed by end-2026; Cadeler vessel-based campaign; Nordseecluster A and B together will be Europe's second-largest offshore wind cluster after Hornsea; principal German North Sea installation campaign of 2026.
- European Commission confirms Greensand first injection "as early as next month" (8 June H2 Bulletin update): Porthos operation 2027; Prinos 2026–2027; further 19 Mt/yr capacity from seven sites approaching commercial readiness; nearly 100 capture projects in the Innovation Fund pipeline targeting 70 Mt/yr injection demand by 2030.
- Ocean Winds energises Gulf of Lion floating wind cluster off French Mediterranean (announced earlier; commissioning continuing 7–13 June); French Premar Mediterranée schedules public event 17 June at Port-de-Bouc on AO10 Mediterranean floating and EDF Power Solutions' Provence Grand Large pilot.
- European Investment Bank Board of Governors (12 June): EIB Group now financing around half of all ongoing European energy-grid projects, one in five solar projects, one in three onshore wind projects and most offshore wind developments; Bay of Biscay interconnector, Princess Elisabeth Energy Island and Iberian grid upgrades all explicitly cited.
- EU Commission launches Battery Booster Facility (9 June, €1.5bn for European battery industry) and "Unlock Your Power" consumer rights campaign (11 June); EGEC EUSEW policy session in Brussels (9 June) calls for a stand-alone European Geothermal Action Plan with binding targets for heating, cooling and electricity; DG Energy confirms package of clean-energy proposals before end of July; Eavor named No. 2 on TIME World's Top GreenTech Companies list (9 June).

1. Offshore Wind — Fixed Bottom

France Launches AO10 Mega-Tender — 5 GW Fixed-Bottom Across Four Atlantic Sites (11–12 June)

The French Energy Regulatory Commission (CRE) published on 11–12 June the specifications for AO10, the long-awaited mega-tender combining the previously separate AO9 and AO10 rounds into a single procurement programme of almost 10 GW — the largest single offshore wind tender ever organised in Europe. The fixed-bottom segment is 5 GW spread across four sites: Fecamp-Grand-Large (Normandy), Bretagne-Nord-Ouest (Brittany), Bretagne-Sud (Brittany) and Oléron (South Atlantic). Bids are due by 12 October 2026; CRE will issue its opinion by early 2027 and the Ministry of Energy will award contracts in February 2027. The tender sets a weighted-average ceiling of €100/MWh over 25 years under Contracts for Difference — significantly above the €66/MWh awarded to TotalEnergies in the last fixed-bottom round but below the cost of less-developed technologies. The single most consequential procurement-policy change is the explicit scoring grid for European-manufactured components and minimisation of Chinese content: the highest scores go to projects using French manufacturers and suppliers, and the framework also rewards low-carbon project development. This is the first French offshore tender to apply an industrial-content scoring grid at this scale and represents a structural shift in European procurement towards re-shored supply chains. Interested developers may submit information requests until 19 July 2026. The aggregated AO9+AO10 pipeline takes France from approximately 2 GW installed today towards 15 GW by 2035 and 45 GW by 2050.

> NES SALES OPPORTUNITY
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> **French AO10 Fixed-Bottom — Industrial-Content Scoring Opens European Tier 2/3 Window**
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> The “European manufacturer scoring + Chinese content minimisation” grid is the most important procurement signal of the week for NES suppliers. NES Tier 2/3 capability in monopile transition pieces, secondary steel, offshore substation topsides, cable accessories, scour protection, marine warranty surveying, ROV inspection, geotechnical site investigation, port logistics and electrical fit-out should immediately engage all 11 likely consortia (TotalEnergies-RWE, EDF Renouvelables, Iberdrola, Equinor-Océole, Shell-EnBW, Ocean Winds, BlueFloat-Sumitomo-Akuo, Qair-TotalEnergies-Corio, wpd, Vattenfall, Eni Plenitude, Cobra, BayWa r.e.-Elicio) over the next 16 weeks to influence bid construction before the 12 October submission deadline.
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> Cherbourg, Le Havre, Saint-Nazaire and Brest are the priority French port hubs for fixed-bottom assembly. RWE’s Essen/Hamburg framework panels remain the principal cross-border German entry-point alongside French Tier 1s (Eiffage, Bouygues, Saipem).

RWE Installs First Turbine at 1.6 GW Nordseecluster A off Juist (10–11 June)

RWE installed the first of 44 Vestas turbines at the 1.6 GW Nordseecluster A offshore wind farm 50 km north of the German island of Juist on 10–11 June. The Cadeler vessel-based installation campaign will continue through end-2026 with all 44 turbines targeted for installation by end of year. Nordseecluster A and B together (the full Nordseecluster programme) will become Europe’s second-largest offshore wind cluster after Hornsea, anchoring the German North Sea installation phase of 2026. The Nordseecluster A campaign is now active concurrently with the Ecowende HKW VI campaign in Dutch waters, providing the highest density of execution-phase continental fixed-bottom procurement in any 12-month window of the decade.

> NES SALES OPPORTUNITY

Nordseecluster A and Ecowende HKW VI — Active Continental T&I Procurement

NES suppliers in cable accessories, scour protection, transition-piece outfitting, monopile commissioning, marine warranty surveying, ROV inspection and Tier 2 lifting accessories should engage RWE (Essen), Cadeler (Copenhagen), Van Oord (Rotterdam), Shell (The Hague) and Eneco (Rotterdam) procurement teams now for follow-on contracts in 2026–2027. Cadeler's 197-monopile Hornsea 3 programme released vessel slots into Nordseecluster, and additional vessel availability will be a constraint, not a buyer, through summer 2026.

Ecowende Installs First Turbine at 760 MW Hollandse Kust West VI (1 June, Continuing 7–13 June)

Ecowende (the Shell-Eneco-Chubu consortium with Van Oord as installation contractor) installed the first Vestas V236-15 MW turbine at its 760 MW Hollandse Kust West Site VI project on 30–31 May, 53 km off IJmuiden using the Boreas installation vessel — with installation continuing through the week to 13 June. The full installation comprises 52 Vestas V236-15.0 MW turbines, delivering 760 MW — sufficient for approximately 3% of current Dutch electricity demand. The project is a benchmark for ecologically-optimised offshore wind design with nature-inclusive monopile design, eagle-deterrent rotor painting and seabed-restoration measures. The Hollandse Kust West VI campaign is one of the two most active Dutch North Sea installation campaigns of 2026 alongside Nordseecluster A.

Baltic Power O&M Contracts Signed — Polish Domestic Content Strengthens (8 June)

Orlen-Northland Power's Baltic Power (1,140 MW, Polish Baltic) signed the first key contracts for its operations and maintenance phase during the week. The project has installed 46 of its planned 76 turbines and all 76 transition pieces. Generation is expected to begin in 2026. The O&M contracts include significant participation by Polish suppliers — a structural development reinforcing the Polish offshore wind supply-chain build-out and signalling that Baltic 2 (Equinor-Polenergia) and Baltic 3 / 9+ (RWE) follow-on projects will see further Polish content increase in their O&M phases. The Port of Łeba is being prepared as the principal O&M hub for Baltic Power.

NES SALES OPPORTUNITY

Baltic Sea O&M Cluster — Polish Tier 2/3 O&M Procurement Now Active

Polish offshore wind O&M is now operational supply chain. NES suppliers in vessel chartering, ROV inspection, marine warranty, electrical instrumentation and turbine condition monitoring should engage Baltic Power (Warsaw/Gdynia), Northland Power (Toronto), Orlen Neptun (Warsaw) and the Port of Łeba authority now. Polish-domiciled subsidiary or JV partnership remains the most reliable Tier 2/3 entry-point.

2. Offshore Wind — Floating

AO10 Floating Segment — 5 GW Across Seven Atlantic and Mediterranean Sites (11–12 June)

The floating segment of AO10 covers 5 GW across seven sites, principally in the Mediterranean (including Golfe du Lion Centre, Golfe de Fos and Narbonnaise Sud Hérault) and on the French Atlantic seaboard. The floating element builds explicitly on the pilot projects already operating in France — in particular the EFGL / Gulf of Lion cluster (Ocean Winds, 30 MW) and the Eolmed pilot off Leucate (Qair, BW Ideol floaters) — and is co-designed with RTE to favour, where appropriate, extensions of existing wind farms to share grid-connection infrastructure and reduce commissioning timelines. The same European-content scoring grid applies to floating bids as to fixed-bottom. France's Premar Méditerranée has scheduled a major public engagement event in Port-de-Bouc on 17 June 2026 to discuss AO10 Mediterranean floating, in partnership with EDF Power Solutions (Provence Grand Large pilot operator and AO6 commercial-tender winner for the first commercial floating farm off the Golfe de Fos).

> NES SALES OPPORTUNITY
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> **French AO10 Floating — 16-Week Bid Construction Window for European Tier 2/3 Suppliers**
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> NES suppliers in mooring lines and connectors, dynamic cable, towage, FPSO-heritage marine warranty, geotechnical site investigation, floater fabrication and Mediterranean port operations have a 16-week window to influence consortium bid construction before the 12 October deadline. Aberdeen Tier 2/3 entry-points are widest where consortia include continental Tier 1s with offshore engineering heritage (RWE-BOURBON Subsea Contracting, Shell-EnBW, Qair-TotalEnergies-Corio, Equinor-Océole, EDF Renouvelables-Maple Power). Port-la-Nouvelle, Marseille-Fos and Sète are the priority French Mediterranean port hubs; BW Ideol's Brest factory and Saint-Nazaire are the Atlantic entry-points.
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> The European-content scoring grid is the procurement differentiator. NES suppliers should structure technical proposals to maximise their consortia's European-content score — in practice, European-fabricated steel, European-manufactured drives, motors and instrumentation, EU-flagged vessels.

Norwegian Storting Forces External Review of Utsira Nord NKr35bn Floating Subsidy (9 June)

The Norwegian Storting voted on 9 June to require an external quality-assurance and socio-economic review of the NKr35bn (~$3.7bn) state subsidy programme allocated to floating wind at Utsira Nord. Opposition party Høyre proposed the review, which carried with support from Frp, KrF and Rødt, giving the four parties a working majority against the minority government of Jonas Gahr Støre. The two pre-qualified consortia awarded project areas in December 2025 — Utsira Nord Havvind DA (Equinor Utsira Nord AS plus Vårgrønn Utsira Nord AS) and Harald Hårfagre AS (Deep Wind Offshore Norway AS plus EDF Renouvelables International SAS) — must now wait until the QA exercise completes by H1 2027 before binding commitments can be entered. Each project area is permitted up to 500 MW; the subsidy competition was originally scheduled for 2028–2029. Equinor explicitly stated to Recharge that "Utsira Nord is already a challenging project, this uncertainty around the framework conditions makes it even more difficult... we cannot rule out implications". Deep Wind Offshore confirmed it is pausing finalisation of its project-specific environmental impact assessment, which must be in place before NVE can issue the final concession. The energy minister and industry representatives warned in parliamentary debate that the review introduces material uncertainty for investors and could threaten both ongoing and future projects — the sharpest political setback to European floating wind in 2026.

> NES SALES OPPORTUNITY
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> **Utsira Nord Pause — Nordic Floating Risk Signal but Continuing Engineering Procurement**
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> Project work continues at engineering level even with binding decisions paused. NES suppliers in mooring, anchor handling, dynamic cable, ROV inspection, towage, marine warranty and HPHT-heritage drilling for monopile installation should maintain active engagement with both consortia:

Equinor (Stavanger) and Vårgrønn (Oslo) for Utsira Nord Havvind; Deep Wind Offshore (Stavanger) and EDF Renouvelables (Paris) for Harald Hårfagre.

NVE's parallel public consultation on the Utsira Nord proposals runs until 18 June 2026 with hearings in Utsira and Karmøy; technical engagement with NVE through this period positions suppliers for procurement once concessions are granted.

Sonardyne-AMOG MoU for Subsea Asset Monitoring (9 June)

Sonardyne (UK) and AMOG (Australia) signed a Memorandum of Understanding to provide a complete subsea asset monitoring service tailored to offshore energy infrastructure operators. The partnership combines Sonardyne's acoustic monitoring and positioning capabilities with AMOG's advanced engineering and structural-health-monitoring expertise. The MoU has direct relevance for both floating-wind mooring monitoring (where dynamic loading and fatigue assessment is a critical operator-side concern) and CCUS subsea-pipeline monitoring. The Floating Offshore Wind 2026 conference (11 June) reported that only 7% of European offshore wind developers believe Europe will meet its 2030 targets — reflecting persistent supply-chain and port-infrastructure constraints.

3. Hydrogen

Engie + European Energy 150 MW Kassø Green Hydrogen Cooperation (9 June)

On 9 June Engie and European Energy announced a strategic cooperation on the Kassø large-scale renewable hydrogen development at Aabenraa, Southern Denmark. Engie will partner European Energy on the 150 MW electrolyser, scheduled for commissioning in 2030 and one of the largest single RFNBO production assets in the Danish-German cross-border hydrogen corridor. The Kassø cooperation builds on European Energy's adjacent 50 MW e-methanol facility (already operating) and is anchored on the new Danish-German cross-border hydrogen pipeline interconnection. Engie brings operator experience from its French and Belgian hydrogen portfolio; European Energy brings the Aabenraa site, the surrounding 300 MW of dedicated solar and wind generation, and the Danish RFNBO permitting heritage. Output will be supplied into industrial offtake contracts in Germany (Hamburg, Schleswig-Holstein heavy industry) and into transport-fuel offtakers in Denmark and the Netherlands. The cooperation is the second major Engie hydrogen announcement of 2026 after its earlier Belgian green hydrogen alliance.

NES SALES OPPORTUNITY

Engie + European Energy Kassø — Danish-German Corridor EPC and O&M Procurement

NES suppliers in electrolyser balance-of-plant, water treatment, compression, hazardous-area instrumentation, pressure vessel inspection, control systems and aftermarket O&M should engage Engie (Paris/Brussels) and European Energy (Søborg, Denmark) procurement now. The 150 MW Kassø procurement begins FEED in H2 2026 with execution-phase EPC packages in 2027–2028. Aabenraa, Esbjerg and the Schleswig-Holstein hydrogen corridor are the priority engagement geographies.

Aberdeen process engineering, ATEX/hazardous-area instrumentation and onshore plant inspection heritage transfers directly. Combine Kassø with the Everfuel Project Frigg award (€244.9m EU H_2

> Bank) and the German Federal hydrogen support fund (Argus reporting Germany committed over €1bn to 78,000 t/yr Danish RFNBO) for the multi-asset Danish-German corridor procurement view.

Everfuel €244.9m EU H_2 Bank Award for 200 MW Vejen — German Federal Co-Funding Detail Emerges

Argus reporting during the week clarified the financing structure of the Everfuel Project Frigg award: Everfuel's €244.9m EU Hydrogen Bank support funds the 200 MW Vejen electrolyser in Jutland (the first build phase of Project Frigg), and German federal co-funding through the H_2Global / Hydrogen Bank cross-border auction window brings German Federal commitment over €1bn for 78,000 tonnes/year of Danish-produced RFNBO hydrogen across Project Frigg and Kassø. The combined EU + German Federal subsidy stack is the largest commercial-scale RFNBO procurement support package committed to any single national supply geography to date. Everfuel's Vejen site will use Topsoe SOEC technology with Danish Energinet grid connection. First H_2 output is targeted for late 2028.

> NES SALES OPPORTUNITY
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> **Everfuel 200 MW Vejen + Kassø — 78,000 t/yr Danish RFNBO Procurement Stack**
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> NES suppliers in SOEC balance-of-plant, high-temperature steam systems, downstream hydrogen distribution, refuelling logistics, pipeline integrity, gas chromatography and Topsoe-adjacent engineering should engage Everfuel (Herning), Topsoe (Lyngby), Energinet (Fredericia) and the German H_2Global / Hydrogen Bank cross-border procurement team. The Jutland-Schleswig-Holstein corridor is now the principal European RFNBO production geography.

Plug Power GenEco Begins Operations at Galp Sines, Portugal

Plug Power confirmed during the week that its GenEco electrolyser module supplied to Galp's Sines refinery in Portugal has begun commissioning operations. The Sines installation is part of Galp's industrial decarbonisation programme and provides the Iberian peninsula's first commercial-scale electrolyser at a refinery site, supplying green hydrogen for fuel hydrotreating. The Plug Power module is rated at 5 MW (initial phase) with a 100 MW second-phase option scheduled for FID in 2027. The Iberian penetration of refinery-side green hydrogen is the second commercial-scale Plug Power refinery deployment in Europe after the Galp Sines site's sister project at Repsol Bilbao.

Holland Hydrogen 1 Commissioning Slips to Late 2026 / 2027

Shell Holland Hydrogen 1, the 200 MW electrolyser at the Port of Rotterdam, confirmed during the week that first H_2 output is now expected in late 2026 with full commissioning extending into 2027. The original target was end-2025. The slip reflects continued execution-phase delays at the largest single RFNBO project in Europe, including PEM stack installation sequencing and grid-connection finalisation. Shell confirmed that the offtake contracts to its Rotterdam refinery remain in place and that the Holland Hydrogen 1 platform will form the operational anchor of the broader Rotterdam Hydrogen Hub.

4. CCUS — Carbon Capture, Use & Storage

Delta Rhine Corridor MoU — Six-Signatory Cross-Border CO_2 Pipeline (10 June)

On 10 June six European infrastructure operators signed a Memorandum of Understanding to develop the Delta Rhine Corridor, a cross-border CO_2 and hydrogen pipeline system connecting Rotterdam, the

Ruhrgebiet industrial heartland and the Rhineland chemical cluster. The six signatories are Gasunie (Netherlands), Open Grid Europe (OGE, Germany), Thyssengas (Germany), Fluxys (Belgium), Energinet (Denmark) and Rotterdam-Antwerp Pipeline (RAPL). The Delta Rhine Corridor will move captured CO_2 from continental industrial sites (BASF Antwerp, Covestro Leverkusen, ArcelorMittal Duisburg, Thyssenkrupp Steel, Yara Sluiskil) westwards to the Rotterdam coast for shipping to North Sea storage, and move hydrogen eastwards from Rotterdam coastal electrolysers into the German industrial heartland. The MoU formalises the engineering case for the corridor; FEED begins in H2 2026, with FID targeted for 2027 and first operation in 2030–2031. The Delta Rhine Corridor is the single most important structural CO_2 transport announcement of 2026 to date and the principal trunk-line architecture that will absorb European industrial CO_2 volumes into the existing North Sea storage hubs (Porthos, Aramis, Northern Lights, Greensand).

NES SALES OPPORTUNITY

Delta Rhine Corridor — Six-Signatory Cross-Border Pipeline Engineering Procurement

The Delta Rhine Corridor MoU triggers a multi-year cross-border pipeline engineering procurement cycle. NES suppliers in pipeline integrity, route surveying, subsea pipeline laying, dual-service (CO_2 / H_2) pipeline coatings, valve service, pigging, leak detection, terminal interface engineering, hydrostatic testing, and onshore terminal architecture should engage all six signatories — Gasunie (Groningen), OGE (Essen), Thyssengas (Dortmund), Fluxys (Brussels), Energinet (Fredericia) and RAPL (Rotterdam/Antwerp) — plus the principal industrial offtakers (BASF, Covestro, ArcelorMittal, Thyssenkrupp, Yara). FEED begins H2 2026; the 12-month engagement window is now.

Aberdeen subsea pipeline integrity, ROV inspection, hydrostatic testing and pipeline-coating heritage transfers directly. The Delta Rhine Corridor will consume Aberdeen-style pipeline integrity engineering services on a continental scale through 2030.

Project Greensand First Commercial Injection Imminent — Commission 8 June Update

The European Commission update of 8 June and the 11 June h2bulletin / Fondazione Leonardo coverage confirmed that Project Greensand will move to first commercial injection in the Nini West reservoir "as early as next month" — with operations beginning July 2026. INEOS Energy and Wintershall Dea operate the project; initial injection rate scaling to 8 Mt/yr by 2028. The Commission's wider update of 8 June set out the structural state of EU offshore CO_2 storage: 19 Mt/yr of permanent injection capacity now committed across seven projects (Greensand, Porthos, Aramis, Northern Lights, Prinos, Bifrost, Pyramid), with 70 Mt/yr of further Innovation Fund-supported storage projects in the pipeline. The 50 Mt/yr 2030 injection target is now operationally within reach. Greensand first injection is the operational ignition point.

NES SALES OPPORTUNITY

Greensand First Injection — Aftermarket O&M and Continental Pipeline Procurement

Once first injection is achieved (July 2026), the project moves into a multi-year ramp from 400 kt/yr to 8 Mt/yr. NES suppliers in well intervention, injection-well integrity, downhole monitoring, ROV inspection, subsea pipeline integrity and CO_2-shipping marine warranty should engage INEOS Energy (Aberdeen) and Wintershall Dea (Kassel/Stavanger) procurement now. The Aberdeen INEOS office is the primary Tier 2/3 access point. The continental CO_2 pipeline cycle (Porthos, Aramis, Prinos, Northern Lights, Delta Rhine Corridor) extends procurement into 2030.

5. Marine Energy

The week's principal marine-energy commercial signal was the connection of the first Spanish wave-energy buoy to the grid at the BiMEP (Biscay Marine Energy Platform) Atlantic test site. The single-unit deployment is a demonstrator-scale step but the first commercial-grid wave-energy electron delivered in the Iberian peninsula and adds Spain to the small group of European jurisdictions (Portugal, Ireland, France) with a grid-connected wave technology. Welsh tidal news (Bombora 240 MW Mona project consenting progress) provides additional context but is UK-jurisdictional and noted only for European market trajectory. European wave and tidal commercial offtake otherwise remains pre-FID across the major technology developers (CorPower Ocean, AW-Energy, Mocean Energy, Floatgen variants) and the principal European positioning window remains the September 2026 CEF Energy call and the Ocean Energy Europe OPEN SEA demonstrator call (deadline 10 July 2026).

NES SALES OPPORTUNITY

Spanish BiMEP Wave-Energy Grid Connection — Engineering Procurement

The BiMEP grid-connected wave buoy creates an Iberian-anchored marine-energy supply-chain engagement point. NES suppliers in mooring engineering, marine warranty, dynamic cable, umbilical inspection, hydrodynamic modelling and aftermarket O&M should engage the BiMEP test-site operator team (Armintza, Bizkaia, Spain). Combine with the OPEN SEA demonstrator call (deadline 10 July 2026) and the ICOE 2027 Hague confirmation for the principal European marine-energy positioning window.

6. Hydropower

A quiet week for European hydropower commercial announcements. The principal hydropower-relevant signal of the week was the EIB Board of Governors speech by President Calviño on 12 June, which noted Portugal's combined wind and hydropower generation as a structural decarbonisation reference point and confirmed continued EIB financing of European pumped-storage and conventional hydropower programmes. Italian, Austrian, Swiss, Bulgarian and Iberian operators continue position-building ahead of the September 2026 CEF Energy call. Bulgaria's ten newly identified pumped storage sites remain the most immediate continental procurement geography. Hydropower-focused NES suppliers should treat the September CEF Energy call as the principal European positioning window.

7. Geothermal

EGEC EUSEW Policy Session Calls for Stand-Alone European Geothermal Action Plan (9 June)

On 9 June EGEC hosted a high-profile geothermal policy session at the European Sustainable Energy Week (EUSEW) in Brussels. Sanjeev Kumar (EGEC) chaired the session; Mechthild Wörsdorfer (Deputy Director-General, DG Energy) delivered the Commission keynote and confirmed that a package of geothermal proposals will be issued by the European Commission before end of July 2026. The session called for a stand-alone European Geothermal Action Plan combining permitting reform, drilling de-risking instruments, district-heating offtake support and Net-Zero Industry Act strategic-technology recognition. Eavor presented operational evidence from the Geretsried project; Turboden presented the Baresi closed-loop ORC installation; Vulcan, Cindrigo and Geothermal Anywhere were represented. The session is the strongest single geothermal-policy moment of 2026 to date and follows the EU Energy Council conclusions of 1 June. The expected end-July Commission package will signal whether the European Geothermal Alliance proposal becomes a formal Commission instrument.

NES SALES OPPORTUNITY

EGEC EUSEW — Geothermal Action Plan Window for NES Drilling and ORC Engagement

The 6-week window to the end-July Commission package is the principal European geothermal positioning moment. NES suppliers in deep-well drilling, well integrity, downhole tools, brine handling, ORC, district-heating-interface engineering and DLE lithium extraction should engage EGEC (Brussels), Vulcan Energy (Karlsruhe), Eavor (Munich), Turboden (Brescia), Cindrigo (London) and the DG Energy geothermal policy team during June–July 2026.

Eavor Named #2 on TIME World's Top GreenTech Companies 2026 (9 June)

On 9 June Eavor Technologies (Munich/Calgary) was named #2 on the TIME World's Top GreenTech Companies 2026 list, the highest-ranking geothermal technology company globally and the only European-headquartered geothermal company in the top 20. The TIME recognition follows Eavor's Overall CleanTech Innovation of the Year award (CleanTech Breakthrough Awards, 5 June). Eavor's flagship Geretsried (Germany) Eavor-Loop project is operational and supplying district heat and grid power. The TIME ranking provides a structural commercial-credibility signal for European pension-fund and infrastructure-fund investment into the Eavor pipeline (additional German sites, New Mexico, Japan).

NES SALES OPPORTUNITY

Eavor — TIME GreenTech Recognition Anchors Geretsried O&M and Pipeline Procurement

With Geretsried operational and pipeline sites in advanced engineering, NES suppliers in well integrity, downhole tools, ROV inspection, brine handling, ORC, district-heating-interface engineering and surface-plant procurement should engage Eavor (Munich/Calgary). The TIME ranking accelerates pension-fund placement into the Eavor pipeline and brings forward second-site procurement.

Vulcan Energy Lionheart Execution-Mode Follow-On — Steeper Climb Reporting (7 June)

Ad-hoc-News published its "Steeper Climb on the Ground" analytical piece on 7 June, providing the most detailed independent reporting yet on Vulcan Energy's execution-mode Lionheart programme. Key findings: 757,423 new shares were issued on 1 June via convertible-note conversion, increasing total share count by approximately 0.7%; the analytical piece confirms that execution-mode delivery now requires both engineering performance and active capital-markets management; the company's communications during the EUSEW week reinforced the procurement-funded engineering schedule. Vulcan management confirmed: well LSC-1 flow rate 105–125 l/s holding; well LSC-2 at 3,000 m target depth; second Vercana rig commissioning H2 2026; Frankfurt Industriepark Höchst lithium electrolysis plant on track for first output 2028. The 7 June reporting is the principal Vulcan execution-mode update of the week.

8. Decommissioning & Norwegian Continental Shelf

Equinor Tordis P&A — Havtil Consent for COSL Promoter Well 34/7-K-4 HT2 (12 June)

On 12 June Havtil (the Norwegian Ocean Industry Authority, formerly PSA) granted Equinor consent for plug and abandonment operations on well 34/7-K-4 HT2 in the Tordis field, North Sea. Operations will be performed by the COSL Promoter semi-submersible drilling rig. The well intervention covers full P&A operations including downhole tubing recovery, cement plugs, casing-cut and surface conductor recovery. Tordis is one of the principal Equinor mature-asset P&A programmes on the NCS and the Havtil consent triggers immediate engineering procurement for the COSL Promoter rig deployment. The consent follows the established Havtil pattern of issuing P&A consents in batches across the Equinor mature-asset portfolio.

> NES SALES OPPORTUNITY
>
> **Tordis P&A — COSL Promoter Rig Deployment Procurement Window Now Open**
>
> NES Tier 2/3 suppliers in downhole P&A tools, cement plugs, casing recovery, well-integrity inspection, ROV intervention, plug-and-abandonment risers, completion-fluid handling and onshore well-decom waste management should engage Equinor (Stavanger) and COSL Drilling Europe (Stavanger). Aberdeen P&A engineering, well-integrity heritage and downhole tool service map directly. Tordis is followed by parallel Equinor NCS P&A consents expected during H2 2026.

Aker Solutions Halten East Subsea EPC and OneSubsea Gullfaks Subsea Compression Upgrade

Aker Solutions confirmed during the week (Ad-hoc-News, 8 June) the award of a subsea EPC contract for the Halten East tieback in the Norwegian Sea, anchored on Equinor's Halten East development. The contract scope covers subsea production trees, manifolds, controls and integration with the existing Åsgard B host platform. OneSubsea separately confirmed an EPC award for the Gullfaks subsea compression system upgrade, extending the field operational life through enhanced reservoir-pressure management. Both awards reinforce the high-tempo NCS subsea procurement pattern of 2026 and add to the May Subsea7 Goliat Gas Export and DeepOcean Visund/Isflak Castberg awards. The combined NCS subsea engineering pipeline now extends well into 2028 with anchor operators Equinor, Vår Energi and Aker BP.

> NES SALES OPPORTUNITY
>
> **NCS Subsea Robust — Aker Solutions Halten East and OneSubsea Gullfaks Compression Procurement**
>
> NES Tier 2/3 suppliers should engage Aker Solutions (Lysaker/Stavanger), OneSubsea (Stavanger), Equinor (Stavanger), Vår Energi (Stavanger) and Aker BP (Lørenskog) procurement teams over the next 60 days. Subsea7 Westhill (Aberdeen) and DeepOcean Haugesund continue as the principal subcontract framework holders. Aker BP's 8 June redetermination of Johan Sverdrup recoverable volumes (+2.2 MMboe) and Archer's acquisition of isol8 (well-integrity technology) further reinforce the operator-side investment thesis.

Geoactive DecomX P&A Decision-Support System Launch (4 June)

Geoactive (Aberdeen) launched its DecomX decision-support system on 4 June, providing operator-side P&A planning software for North Sea well decommissioning. The system targets operator integrated workflows across well selection, P&A sequencing, rig deployment, cost modelling and regulatory compliance. The launch is the first commercial release of an Aberdeen-developed decision-support platform specifically targeting the NCS P&A engineering workflow and adds to the structural Aberdeen software-and-services footprint in the NCS decom market.

9. Industry & Policy

TenneT Awards Liebherr Six RL 2600 Offshore Cranes for 2 GW Dutch HVDC Programme (9 June)

On 9 June TenneT confirmed the award to Liebherr of six RL 2600 heavy-lift offshore cranes for the Dutch 2 GW HVDC platform installation programme. The cranes will be deployed on the IJmuiden Ver Beta, IJmuiden Ver Gamma and Nederwiek Beta 2 GW HVDC platforms, all scheduled for operational delivery in 2029. Each Liebherr RL 2600 has a 2,600-tonne capacity and is designed specifically for the topside-and-platform installation programme that TenneT must complete to deliver Dutch offshore wind grid connection through 2030. The award is the single largest offshore heavy-lift crane procurement of 2026 to date in Europe and confirms continued aggressive HVDC platform engineering procurement under the TenneT recapitalisation announced earlier in 2026. Liebherr (Switzerland/Germany) will deliver the six cranes from its Rostock production facility.

> NES SALES OPPORTUNITY
>
> **TenneT 2 GW HVDC — Liebherr Heavy-Lift Procurement Underpins 2029 Operation Window**
>
> NES Tier 2/3 suppliers in marine warranty, lift planning, offshore crane operations, HVDC platform installation, platform foundation engineering, dynamic-cable installation and aftermarket O&M should engage TenneT (Bayreuth/Arnhem), Liebherr (Rostock) and the Dutch HVDC platform EPC contractors (GE Vernova, Siemens Energy, Hitachi Energy). The 36-month engineering window to first operation in 2029 is the principal Dutch offshore-wind grid procurement cycle.

EIB Board of Governors — Calviño Confirms EIB Finances Most European Offshore Wind (12 June)

On 12 June EIB President Nadia Calviño delivered the keynote speech to the EIB Board of Governors meeting. Key disclosures: the EIB finances one-half of European grid infrastructure investment, one-fifth of European solar PV, one-third of European onshore wind, and most European offshore wind projects. The speech also highlighted Portugal’s combined wind and hydropower generation as a structural decarbonisation reference and confirmed continued EIB engagement on Net-Zero Industry Act strategic-technology programmes. The Calviño speech is the strongest single confirmation of EIB structural underwriting of European offshore wind to date and arrives in parallel with the EIB Battery Booster Facility (€1.5bn, 9 June). The combined EIB programme signals continued availability of debt finance into European offshore wind, grid, hydrogen and CCUS commercial-scale projects through 2030.

> NES SALES OPPORTUNITY
>
> **EIB Programme — Continental Debt Finance Anchors European Offshore Wind Procurement**
>
> NES Tier 2/3 suppliers should engage EIB project finance teams (Luxembourg) for offshore wind, HVDC platform engineering, CCUS pipeline, hydrogen production and battery storage debt-financed projects through 2030. The EIB structural underwriting of European offshore wind is the principal continental debt-finance signal of 2026 to date.

EU Battery Booster Facility Launch — €1.5bn for European Battery Industry (9 June)

On 9 June the European Commission launched the Battery Booster Facility, a €1.5 billion financial instrument to support European battery manufacturing and supply-chain development. The facility provides combined grant, equity and loan instruments for European battery cell manufacturers, cathode-and-anode-active-material producers, battery-recycling operators and battery-system integrators. The instrument is operated jointly by the European Commission and the EIB and follows the structural challenge to European battery manufacturing in 2024–2025. The Battery Booster Facility is a structural commitment to retain commercial-scale battery manufacturing in Europe and adds to the Innovation Fund battery-storage allocations of recent rounds.

EU "Unlock Your Power" Campaign and ETS Buildings/Road Transport Agreement (11 June)

On 11 June the European Commission launched the "Unlock Your Power" campaign to help European citizens better understand and use their energy rights. The campaign covers consumer access to demand-response services, retail tariff transparency, prosumer access to grid services and citizen energy community formation. Separately on 11 June the European Parliament, Commission and Council reached agreement on key safeguards for the new Emissions Trading System covering Buildings and Road Transport (ETS2), including the Social Climate Fund. The combined Commission output signals continued consumer-facing energy policy build-out in parallel with the structural enforcement of the 2030 climate framework. Also on 11 June the European Central Bank raised interest rates by 25 basis points, citing the energy cost impact of the Iran war as the principal driver of inflation pressure — the first monetary-policy tightening of 2026.

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	France AO10 fixed-bottom mega-tender — European-content scoring	Fixed-Bottom Wind	RTE, French DGEC, Tier-1 consortia, BoP and steel suppliers	Bids 12 Oct 2026; awards Feb 2027	HIGH
2	France AO10 floating segment — 5 GW seven Atlantic/Med sites	Floating Wind	Equinor-Océole, Shell-EnBW, RWE-BOURBON, EDF-Maple Power	Bids 12 Oct 2026; Premar 17 June Port-de-Bouc	HIGH
3	Delta Rhine Corridor MoU — cross-border CO_2/H_2 pipeline	CCUS / Hydrogen	Gasunie, OGE, Thyssengas, Fluxys, Energinet, RAPL	FEED H2 2026; FID 2027	HIGH
4	RWE Nordseecluster A first turbine — 660 MW Juist	Fixed-Bottom Wind	RWE, Vestas, Van Oord, DEME, Boskalis	Operation H1 2027	HIGH
5	Engie + European Energy 150 MW Kassø green hydrogen	Hydrogen	Engie, European Energy, Energinet, Topsoe	FEED H2 2026; commissioning 2030	MEDIUM
6	Project Greensand first commercial injection (Nini West)	CCUS	INEOS Energy (Aberdeen), Wintershall Dea	July 2026 (Commission 8 June: imminent)	HIGH
7	Baltic Power O&M contracts — 1.2 GW Polish offshore wind	Fixed-Bottom Wind	Orlen, Northland Power, Port of Łeba	Operation late 2026/2027	MEDIUM

8	Norway Utsira Nord QA review — continuing engineering	Floating Wind	Equinor, Vårgrønn, Deep Wind, EDF Renouvelables, NVE	QA review H1 2027 then concession	**LOW-MED**
9	TenneT 2 GW Dutch HVDC — Liebherr cranes / platform install	Industry / Policy	TenneT, Liebherr, GE Vernova, Siemens Energy	Operation 2029; engagement 36-mo window	**MEDIUM**
10	NCS subsea robust — Aker Solutions Halten East / OneSubsea Gullfaks	Decom / NCS	Aker Solutions, OneSubsea, Equinor, COSL Drilling	60-day Q3 2026 procurement window	**MEDIUM**

Market Context for North East Scotland

Two structural commercial events define the week to 13 June for the European offshore low-carbon supply chain: the formal launch of France's AO10 mega-tender (10 GW combined fixed-bottom and floating, bids 12 October 2026, awards February 2027, European-content scoring grid) and the signature of the Delta Rhine Corridor MoU (Gasunie, OGE, Thyssengas, Fluxys, Energinet, RAPL) covering cross-border CO_2 and hydrogen pipeline architecture from Rotterdam through the Ruhrgebiet and Rhineland. The AO10 launch opens a 16-week consortium bid construction window for European Tier 2/3 suppliers in mooring, dynamic cable, marine warranty, geotechnical site investigation and Mediterranean port operations; the Delta Rhine Corridor MoU opens a multi-year pipeline integrity engineering procurement cycle through 2030. Both events have direct Aberdeen Tier 2/3 capability-transfer implications and define the NES procurement priority for the next 60 days.

The principal risk signal of the week was the Norwegian Storting's 9 June vote to require an external quality-assurance review of the NKr35bn Utsira Nord floating subsidy programme. Equinor and EDF Renouvelables-led consortia have paused binding commitments through H1 2027; Deep Wind Offshore has paused its project-specific environmental impact assessment. The Utsira Nord setback is the sharpest political setback to European floating wind in 2026 and tempers the floating-wind procurement signal from the French AO10 floating segment. NES suppliers should engage at engineering level through the NVE public consultation period (deadline 18 June 2026) and through the Equinor (Stavanger), Vårgrønn (Oslo), Deep Wind (Stavanger) and EDF Renouvelables (Paris) consortium engineering teams which continue technical preparation despite the binding decisions being paused.

NCS subsea procurement continues robust with Aker Solutions Halten East subsea EPC, OneSubsea Gullfaks subsea compression upgrade, Havtil consent for the Tordis P&A on the COSL Promoter rig (12 June) and Aker BP's 8 June +2.2 MMboe Johan Sverdrup redetermination all reinforcing the NCS engineering pipeline through 2028. Baltic Power's 1.2 GW Polish offshore wind O&M contracts open a new Tier 2/3 procurement geography. RWE's first turbine installation at Nordseecluster A (660 MW off Juist) confirms continued German offshore wind execution; Ecowende's first turbine at the Dutch HKW VI 760 MW project shows continued Dutch execution. Hydrogen: Engie + European Energy's 150 MW Kassø cooperation, Everfuel's 200 MW Vejen detail with German Federal co-funding bringing 78,000 t/yr Danish RFNBO procurement, and Holland Hydrogen 1 commissioning slip to late 2026/2027. CCUS: Project Greensand first commercial injection imminent (Commission 8 June: as early as next month) anchors the operational ignition of continental CO_2 storage. Geothermal: EGEC EUSEW policy session calls for stand-alone European Geothermal Action Plan, Eavor #2 on TIME GreenTech list, Vulcan Lionheart execution-mode confirmed. The single most important NES action over the next 30 days is engagement with the AO10 consortium bid construction process (16-week window to 12 October) and parallel Delta Rhine Corridor signatory engagement (FEED begins H2 2026).

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