



# ENERGY TRANSITION WEEKLY

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*Your essential intelligence briefing on offshore wind, hydrogen, CCUS, decommissioning and renewables developments impacting North East Scotland.*

## EXECUTIVE SUMMARY

The global offshore low-carbon energy sector demonstrated continued resilience during the week ending 17 April 2026, with three developments of strategic importance for North East Scotland supply chain companies. US federal inaction cleared the legal path for five major offshore wind projects totalling more than 4 GW to proceed on the East Coast, confirming that physically and financially advanced projects can survive political headwinds. A landmark industry report released on 10 April revealed that 72% of expected 2035 cumulative hydrogen and CO<sub>2</sub> pipeline length remains at feasibility stage, exposing a structural gap between production ambitions and investable transport infrastructure. In the UK, new regulations extending the established offshore safety framework to CCUS and offshore hydrogen production entered into force on 6 April, creating a clearer compliance environment and generating fresh demand for North Sea-derived assurance, engineering and integrity management expertise.

## OFFSHORE WIND DEVELOPMENTS

### US Projects Resume After Appeal Deadline Passes

On 10 April 2026, reporting confirmed that the US Interior Department had missed the court deadline to appeal rulings allowing five major offshore wind projects on the US East Coast to proceed<sup>[1]</sup>. The projects — Sunrise Wind, Vineyard Wind, Coastal Virginia Offshore Wind, South Fork Wind and Revolution Wind — collectively represent more than 4 GW of generating capacity and are sufficient to power more than 2 million homes<sup>[1][2]</sup>.

The development is significant because it confirms that project maturity, physical progress and sunk capital can sustain offshore wind momentum even during prolonged periods of political opposition. Revolution Wind, developed by Ørsted, had already begun delivering electricity to the grid in mid-March 2026, and the legal reprieve removes the final procedural obstacle to full completion of these advanced-stage projects<sup>[2]</sup>.

### Supply Chain Implications for North East Scotland

For North East Scotland companies, the primary lesson from this week's US offshore wind development is not about market entry to the US as such. The more transferable commercial insight is that execution-stage services — marine coordination, commissioning support, subsea cable works, vessel management, offshore inspection and early operations mobilisation — are the most resilient parts of the supply chain

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when project-level risk is elevated<sup>[1][2]</sup>. These are disciplines in which North Sea experience provides a demonstrable quality premium.

The broader offshore wind market context remains positive. Global offshore wind investment in final investment decisions during 2025 reached approximately £39 billion, with projections indicating 236 GW of fully operational capacity by 2030<sup>[3]</sup>. However, sector analysts increasingly emphasise "value over volume", with developers forming strategic partnerships and managing capital exposure through selective divestments rather than pursuing capacity growth indiscriminately<sup>[3]</sup>.

## GREEN HYDROGEN & CCUS INFRASTRUCTURE

### Transport Networks: The Structural Bottleneck

An industry report released on 10 April 2026 found that 72% of expected 2035 cumulative hydrogen and CO<sub>2</sub> pipeline length globally remains at the feasibility stage<sup>[4]</sup>. This is the most commercially significant statistic of the week. It confirms that the global energy transition's hydrogen and carbon storage ambitions are materially constrained not by production technology, but by the absence of investable, consented and engineered transport infrastructure<sup>[4]</sup>.

For North East Scotland supply chain companies, this represents one of the clearest market signals in recent months. Expertise in subsea and onshore pipeline engineering, integrity management, welding, coatings, inspection, non-destructive testing, compression system support and brownfield modification maps directly onto the hydrogen corridor and CO<sub>2</sub> transport buildout still required to connect production sources with industrial clusters and storage reservoirs<sup>[4]</sup>.

Companies that can support project sponsors to move hydrogen or CO<sub>2</sub> transport schemes through FEED, consenting and into regulated delivery — drawing on offshore and onshore pipeline experience accumulated in the North Sea — are well positioned to capture work as the infrastructure gap begins to close through the late 2020s.

### UK Offshore CCUS and Hydrogen Regulations Enter Force

The Carbon Capture Utilisation and Storage and Offshore Hydrogen Production (Miscellaneous Amendments) Regulations 2026 came into force on 6 April<sup>[5]</sup>. The regulations extend elements of the UK's established offshore safety regime — developed for the oil and gas sector over several decades — to cover CCUS and offshore hydrogen activities<sup>[5][6]</sup>.

The framework brings these emerging sectors into the same operating environment as conventional offshore projects, applying established concepts covering wells, pipelines, fire and explosion risks, incident reporting and safety case responsibilities<sup>[5][6]</sup>. A complementary legislative update addressed the Offshore Installations (Prevention of Fire and Explosion, and Emergency Response) Regulations 1995 and associated rules, confirming the breadth of the regime now being applied<sup>[7]</sup>.

For North East Scotland firms, the entry into force of this framework reduces regulatory ambiguity and increases the value of legacy offshore compliance expertise. Capabilities in verification, duty-holder support, HAZID and HAZOP facilitation, operations readiness, integrity management, inspection, audit and assurance are now directly applicable to emerging hydrogen and CCUS projects operating under an extended UK offshore safety regime<sup>[5][6][7]</sup>.

## POLICY & REGULATORY DEVELOPMENTS

### UK Offshore Regulatory Landscape Expands

The April 2026 regulatory changes represent the most concrete UK policy development of the week for North East Scotland supply chain businesses<sup>[5]</sup>. They signal that the UK government is treating offshore CCUS and hydrogen as mature sectors requiring formal safety governance rather than experimental technologies operating outside mainstream regulation<sup>[6][7]</sup>.

This has two practical consequences for the supply chain. First, project developers and operators will require compliance-grade support from experienced offshore safety practitioners as they bring their projects to operational readiness, creating demand for services that North East Scotland companies already provide<sup>[5][6]</sup>. Second, the regulatory clarity reduces perceived project risk for financiers and insurers, which should in turn accelerate the movement of projects from development into investment decision and construction phases<sup>[7]</sup>.

### US Regulatory Context

The US Bureau of Ocean Energy Management's proposed rulemaking on offshore renewable energy regulatory impact analysis, published in March 2026, continues to provide a framework for assessing economic and environmental impacts of renewable energy activities on the Outer Continental Shelf<sup>[8]</sup>. The missed appeal deadline on the five East Coast projects suggests that the current US administration's opposition to offshore wind is encountering the practical limits of what executive action alone can achieve against projects already embedded in legal, contractual and physical infrastructure<sup>[1][2]</sup>.

## SUPPLY CHAIN OPPORTUNITIES

### Priority Areas for North East Scotland Companies: Week Ending 17 April

The combined picture from this week's developments points to five practical opportunity areas that North East Scotland supply chain companies should be actively mapping against their capability profiles.

Construction-stage offshore wind support. The five US projects now proceeding represent more than 4 GW of offshore wind requiring final construction, commissioning and early operational mobilisation<sup>[1][2]</sup>. The broader global pipeline of projects in advanced delivery stages creates sustained demand for marine coordination, vessel services, subsea cable works and commissioning support where North Sea operating experience is valued.

Hydrogen and CO<sub>2</sub> transport infrastructure. With 72% of expected 2035 global pipeline still at feasibility stage, the coming years will require significant engineering resource to move projects into FEED, consenting and delivery<sup>[4]</sup>. Pipeline design, integrity planning, route engineering, installation preparation and compliance support are all in demand.

Offshore safety and compliance services for CCUS and hydrogen operators. The April 2026 UK regulations create a new and growing compliance market as projects adapt to an extended safety regime<sup>[5][6][7]</sup>. Firms with HSE systems, verification and operational assurance expertise can apply these services directly to hydrogen and CCUS developers.

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Brownfield conversion and infrastructure repurposing. The combination of CCUS expansion and decommissioning pressure in the North Sea creates opportunities to apply offshore engineering expertise to the assessment and modification of existing infrastructure for new low-carbon purposes<sup>[5][6]</sup>.

Integrated offshore delivery packages. Increasingly, developers seek to reduce interface risk by working with suppliers capable of combining engineering, marine and compliance capability. Companies that can offer bundled propositions rather than isolated point services are likely to find stronger commercial traction in an integrated offshore low-carbon market<sup>[4][5]</sup>.

## IMPLICATIONS FOR NORTH EAST SCOTLAND SUPPLY CHAIN

### The Market Is Becoming Systems-Led

The deeper strategic lesson from the week ending 17 April 2026 is that the offshore low-carbon market is maturing into a systems business. Offshore wind, hydrogen transport, CO<sub>2</sub> networks, safety regulation and long-term asset management are converging into a single connected offshore development environment, rather than remaining distinct technology verticals<sup>[4][5]</sup>.

This structural shift is strategically positive for North East Scotland. It means that decades of experience in offshore project delivery, marine risk management, subsea systems, pipeline and asset integrity, and offshore safety assurance can be redeployed into adjacent low-carbon markets without depending on any single technology pathway to dominate. Companies organised around solving integrated offshore delivery problems — rather than marketing themselves through a single technology label — are best positioned to capture the value now emerging across the intersections of wind, hydrogen, CCUS and decommissioning<sup>[1][4][5]</sup>.

The combination of a clearer UK regulatory framework for offshore CCUS and hydrogen, an identified infrastructure gap in hydrogen and CO<sub>2</sub> transport networks, and recovering momentum in offshore wind execution provides a coherent and actionable commercial framework for North East Scotland supply chain businesses planning their development priorities for the remainder of 2026.

## LOOKING AHEAD

The week's developments confirm that the offshore low-carbon transition is entering a more execution-focused phase across multiple sectors simultaneously. Critical areas to monitor in coming weeks include:

- Whether the hydrogen and CO<sub>2</sub> transport network infrastructure gap identified in the 10 April report begins to generate visible FEED and engineering procurement activity from European corridor sponsors
- How the UK's new offshore CCUS and hydrogen regulations shape the first compliance and operational readiness requirements for projects now in development
- Whether the five US offshore wind projects given legal clearance accelerate construction timescales and contracting activity beyond current plans
- How North Sea co-location planning between offshore wind, oil and gas and CCUS progresses as the UK North Sea Future Plan framework continues to shape industry behaviour

- The pace at which hydrogen and CCUS project sponsors in the UK and EU move from feasibility to investment decision, as the infrastructure bottleneck report creates pressure to accelerate enabling-system development

The convergence of execution momentum, infrastructure gap recognition and regulatory maturation across these sectors provides a more commercially concrete opportunity landscape than at any point in the previous twelve months.

## RESOURCES USED

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[2] Shared Sapience. (2026, April 12). The Century Report Weekly: April 6–12, 2026. <https://sharedsapience.substack.com/p/the-century-report-weekly-april-6-12-2026>

[3] RenewableUK. (2026, March 13). Global offshore wind pipeline March 2026. RenewableUK EnergyPulse. <https://www.renewableuk.com/energypulse/reports/global-offshore-wind-pipeline-march-2026/>

[4] GlobeNewswire. (2026, April 10). Hydrogen and CCUS Transport Networks Industry Report 2026 — 72% of the Expected 2035 Cumulative Pipeline Length Remains at the Feasibility Stage. <https://www.globenewswire.com/news-release/2026/04/10/3271565/28124/en/Hydrogen-and-CCUS-Transport-Networks-Industry-Report-2026-72-of-the-Expected-2035-Cumulative-Pipeline-Length-Remains-at-the-Feasibility-Stage.html>

[5] UK Legislation. (2026). The Carbon Capture Utilisation and Storage and Offshore Hydrogen Production (Miscellaneous Amendments) Regulations 2026. [https://www.legislation.gov.uk/uksi/2026/185/pdfs/uksi\\_20260185\\_en.pdf](https://www.legislation.gov.uk/uksi/2026/185/pdfs/uksi_20260185_en.pdf)

[6] Guvnor AI. (2026, April). Offshore safety rules now apply to carbon capture and hydrogen production. <https://guvnor.ai/updates/ccus-offshore-hydrogen-safety-regulations-2026/>

[7] ChangeFlow. (2026, March 12). Legislative amendment summary — offshore CCUS and hydrogen production regulations. <https://changeFlow.com/govping/government-legislation/uk-gov-2026-03-12-54>

[8] ChangeFlow. (2026, March 13). BOEM Proposed Rule on Offshore Renewable Energy. <https://changeFlow.com/govping/energy/us-fed-2026-03-14-356>

*Energy Transition Weekly Global Edition is prepared for senior executives in the offshore low-carbon energy sector, providing business-focused intelligence on market developments, strategic partnerships, and policy shifts affecting the global energy transition.*

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