Market Intelligence Report

Offshore Low Carbon Market Opportunities in Europe

Prepared for: North East Scotland (NES) Energy Supply Chain Businesses

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Date: 13th April 2026 (Updated to include the recent announcement from France)

Scope: Non-UK European Markets | Low Carbon Energy Sectors

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Executive Summary

Europe's offshore low carbon energy sector is in the midst of a profound structural acceleration. A January 2026 North Sea Investment Pact signed by nine governments commits to building 300 GW of offshore wind by 2050, mobilising an estimated €1 trillion in investment. In a landmark development on 2 April 2026, France announced a 10 GW offshore wind mega-tender, its largest ever, combining the AO9 (floating) and AO10 (fixed-bottom) rounds into a single competitive procurement, with winners targeted by end-2026 or early 2027. This makes France one of the most significant near-term market opportunities for NES supply chain companies with floating wind, subsea, and deep-water expertise. Alongside offshore wind, carbon capture (CCUS), green hydrogen, floating wind, marine energy, clean fuels, and decommissioning markets are expanding simultaneously, creating a multi-sector demand surge that existing European supply chains cannot fully satisfy.[1]

North East Scotland (NES) occupies a uniquely advantaged position to exploit these opportunities. Home to 75% of the world's subsea engineering capability, 50+ years of harsh-environment offshore experience, the Energy Transition Zone (ETZ) in Aberdeen, a world-class floating wind innovation cluster, and hundreds of supply chain firms actively pivoting from oil and gas into renewables, the region has the credentials, the workforce, and the industrial base that European project developers urgently need. The critical challenge is market entry, awareness, and targeted commercial development in specific European countries and project pipelines.[2][3][4]

This report provides an integrated, sector-by-sector and country-by-country assessment to help NES companies understand where the opportunities lie, what barriers must be navigated, and how to develop a structured European export strategy.

The report comprises eight key sections as follows:

1. The Energy Transition Context: Political and Economic Landscape
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Sources Used (69 sources)

While the opportunities for NES supply chain companies are increasing exponentially in European offshore low carbon sectors, opportunities do not always transfer into success. The argument WHY expand into non-UK European markets has been won – only the HOW remains to be discussed.

You are strongly encouraged to evaluate your own company’s readiness for European low carbon markets by completing the interactive self-assessment exercises accompanying this report.

1. The Energy Transition Context: Political and Economic Landscape

1.1 The Scale and Urgency of European Targets

The scale of European ambition for low carbon energy has never been greater, and urgency is being driven by both climate commitments and energy security imperatives because of the US-Israel war in Iran. The EU's Offshore Renewable Energy Strategy targets a minimum of 60 GW of offshore wind plus 1 GW of ocean energy by 2030, rising to 300 GW of offshore wind and 40 GW of ocean energy by 2050. REPowerEU, the EU's emergency response to energy security risks, targets 420 GW of total wind energy (onshore and offshore) across Europe by 2030.[5][6]

As of early 2026, a combined offshore wind capacity of just 37 GW was installed across all of Europe, meaning the continent must more than quadruple installed offshore wind capacity within four years to hit the 2030 target. This is a physically and logistically daunting challenge, and it is precisely the supply chain gap that creates the commercial opening for NES companies.[7]

1.2 The North Sea Investment Pact 2026

The January 2026 North Sea Summit in Hamburg marked a watershed moment. Nine governments - Belgium, Denmark, France, Germany, Ireland, Luxembourg, the Netherlands, Norway, and the UK - signed the "Investment Pact for the North Seas," committing to build 15 GW of offshore wind per year over 2031-2040 and to collectively develop 100 GW of shared projects. Governments pledged to de-risk investment, while industry committed to driving down offshore wind costs by 30% by 2040. This long-term demand visibility is the signal the supply chain has been waiting for to justify new capacity investment.[8][1]

A landmark bilateral development within this context was the Germany-Denmark agreement on the Bornholm Energy Island, a 3 GW cross-border project backed by a €645 million EU Connecting Europe Facility grant, the first offshore wind farm designed to supply two countries simultaneously.[9]

1.3 Country-Level Policy Shifts

Germany

Europe's largest near-term market but has experienced significant turbulence. Germany's 2025 offshore auctions were characterised by negative bidding that drove prices to unsustainably low levels (€0.18M/MW in 2025 versus €1.8M/MW in 2023), with one auction receiving no bids at all. The government has now announced a shift to Contracts for Difference (CfDs) from 2026, aiming to stabilise investment conditions and triple installed capacity from ~11 GW to 30 GW by 2031 and 40 GW by 2035. This transition introduces some short-term project delay risk but confirms massive long-term ambition.[10][11]

The Netherlands

Experienced a similarly painful period when the Nederwiek 1 GW tender received no proposals. The Dutch government responded with an "Action Plan for Offshore Wind," including €1 billion in transitional support (TOMOZ), legislation enabling CfDs by 2027, and exploration of a PPA guarantee

fund. The Netherlands targets around 21 GW of offshore wind by 2030, though grid constraints remain a major brake.[12]

Denmark

Scrapped negative bidding following a 2024 auction failure in which no bids were received for 3 GW. The Danish Energy Agency launched CfD-based tenders for three sites (North Sea Mid, Hesselø, North Sea South) in November 2025, and the EU approved a €5 billion CfD scheme in March 2026. Denmark also committed to the 3 GW Bornholm Energy Island cross-border project.[13][9]

Norway

Awarded two floating offshore wind project areas in Utsira Nord in December 2025, one to Equinor/Vårgrønn and one to Harald Hårfagre (Deep Wind Offshore/EDF), each with up to 500 MW capacity and backed by up to NOK 35 billion in government support. Norway's government has signalled a target of 30,000 MW of offshore wind by 2040 and is investing through Enova with NOK 2 billion per project available for floating wind technology demonstration.[14][15][16]

France

Commissioned its first floating offshore wind farm (Provence Grand Large, 25 MW) in June 2025. The country has ambitious commercial floating wind development underway, including the Méditerranée Grand Large project, and is advancing large-scale fixed-bottom wind in the Atlantic (including Yeu et Noirmoutier and Saint-Nazaire already operational).[17][18] On 2 April 2026, the French government announced a landmark 10 GW offshore wind mega-tender, its largest ever, by merging the previously separate AO9 (floating) and AO10 (fixed-bottom) rounds into a single, large-scale procurement. The combined tender covers 5 GW of fixed-bottom capacity and 5 GW of floating capacity, spread across seven project areas in the English Channel, Atlantic Ocean, and Mediterranean Sea, with winners to be selected by end-2026 or early 2027. The tender includes requirements for domestic and European manufacturing to reduce dependence on Chinese supply chains, a direct alignment with the EU's NZIA resilience criteria and a significant commercial signal for NES supply chain companies with floating wind, subsea, and deep-water engineering capabilities.

Poland

Represents the most dynamic emerging offshore wind market in Europe. In December 2025, Poland's first-ever competitive CfD auction awarded support to 3.4 GW in the Baltic Sea. Bałtyk 2 & 3 (Equinor/Polenergia, 1.4 GW) and Baltica 2 (PGE/Ørsted, 1.5 GW) both reached FID in 2025, with combined capital investment of over €13.7 billion. By 2040, Poland could account for nearly half of total Baltic Sea offshore wind capacity.[19][20][21]

Belgium

Home to the HOPE offshore green hydrogen project near Ostend and is expanding its CCUS cooperation, including bilateral CO_2 storage agreements with Norway.[22][23]

Spain and Portugal

Emerging hubs for green hydrogen, particularly solar-powered electrolysis. The HyDeal España project targets 9.5 GW of solar and 7.4 GW of electrolyzers by 2030, with EPC partnerships signed.

Galp's Sines refinery in Portugal has installed 100 MW of green hydrogen electrolyzers (Plug Power) as of January 2026.[24][25]

1.4 Economic and Investment Environment

European offshore wind has faced a challenging investment environment since 2022 due to inflation, rising interest rates, and supply chain cost increases. However, the shift to CfDs across Germany, Denmark, and the Netherlands, and the January 2026 Investment Pact, signal a significant policy reset designed to restore investor confidence. The EU Electricity Market Regulation requires all new renewable energy receiving state-backed support to use two-way CfDs or equivalent by July 2027. For NES supply chain companies, this policy normalisation means more stable project pipelines and more predictable procurement timelines from 2026 onwards.[11]

2. Supply Chain Gap Analysis: Bottlenecks and Unfulfilled Demands

2.1 Overview of the Supply Chain Challenge

The European offshore low carbon sector faces a profound supply chain paradox: demand has never been greater, yet the ability to build and service the required infrastructure is severely constrained. The Energy Industries Council (EIC) warns that Europe holds 43% of global installed offshore wind capacity but risks significant delivery shortfalls against ambitious national targets. Out of approximately 80 specialist installation vessels operational in Europe, only five can handle 14-15 MW turbines. This limitation affects projects competing across borders, including those funded in the Netherlands, Germany, Denmark, and Poland simultaneously.[10]

2.2 Key Supply Chain Bottlenecks by Category

Foundations and Substructures

Monopile foundations are the dominant fixed-bottom solution, but they are growing to extreme sizes for 15+ MW turbines. According to the Global Wind Energy Council, bottlenecks in European fixed-bottom foundations are projected to emerge from 2026 onwards, and for floating offshore foundations from 2029 onwards. No single manufacturer can yet produce sufficient monopile volumes at the scale required, particularly for the generation of XL monopiles weighing 2,000+ tonnes.[5]

Turbine Blades and Components

European factories are expected to reach production of only about 9.5 GW of offshore turbine capacity per year in 2025, while demand substantially exceeds this. Blade production is identified by WindEurope as a specific current bottleneck; factories are running near maximum capacity and must expand for 115-metre blades required for offshore 15 MW+ turbines. Tower fabrication similarly needs expansion in the second half of this decade.[5]

Offshore Installation and Service Vessels

The shortage of specialised vessels, for turbine installation, cable laying, monopile driving, and crew transfer, is acute. Only five vessels globally can handle the latest generation 14-15 MW turbines, and these are in competition across multiple simultaneously-running European projects. The cable installation vessel gap could slow the speed of offshore wind farm completions across Europe from 2026.[10][5]

Port Infrastructure

Port infrastructure across Europe is widely regarded as inadequate for the growing pipeline of projects. Critical gaps exist in heavy-lift quayside capacity, laydown space, water depth for XL component handling, and operational support facilities. Key hubs such as Eemshaven (Netherlands), Esbjerg (Denmark), and Rostock (Germany) are operating near capacity.[26]

Subsea Cables and Power Transmission

The manufacturing and installation of high-voltage direct current (HVDC) cables and offshore substations remains a critical bottleneck. Lead times for HVDC cable manufacturing now extend to

five or more years. As projects connect further from shore, the complexity and cost of subsea transmission systems increase, requiring specialist engineering and marine operations capabilities.

Floating Wind Infrastructure

For floating offshore wind, still at an early commercial stage in Europe, the supply chain for mooring systems, dynamic cables, floating substructures, and specialised installation equipment is almost non-existent at scale. The transition from demonstration to commercial arrays (anticipated in Norway, France, and potentially Poland by the early 2030s) requires building this supply chain largely from scratch.[27]

CCUS Services and Infrastructure

With Northern Lights Phase 2 under construction and Porthos operational in 2026, plus over 200 CCUS projects in European development, there is growing demand for CO_2 pipeline engineering, compression station design, injection well services, subsea monitoring, and offshore storage management. The pool of specialist contractors with operational CCUS experience is thin.[28]

Green Hydrogen

The European Hydrogen Bank's second auction (15 projects, €992 million) and a third auction planned for late 2025/2026 with €1 billion are accelerating green hydrogen development. Demand is emerging for large-scale electrolyzer balance-of-plant engineering, offshore hydrogen pipeline infrastructure, pressure and desalination systems, and integration with offshore wind platforms. However, many projects are struggling to reach FID due to hydrogen price uncertainty and offtake challenges.[29][30]

Decommissioning

Europe commands 46.1% of the global offshore decommissioning market. Decommissioning accounted for 15% of all UK Continental Shelf oil and gas expenditure in 2024, and this could exceed 30% by 2030. For Norway alone, complex multi-platform decommissioning campaigns are intensifying. The global decommissioning market is valued at approximately USD 10.5 billion in 2025 and is projected to reach USD 19.7 billion by 2034.[31][32][33]

3. NES's Unique Strengths and Competitive Advantages

3.1 The NES Proposition: Built for Harsh-Environment Offshore

North East Scotland's energy supply chain offers a combination of competencies that are extraordinarily rare globally and directly relevant to the needs of European offshore low carbon developers and contractors. The region's 50+ years of North Sea oil and gas experience, conducted in some of the most technically demanding offshore conditions in the world, has created a depth of engineering, operational, and project management capability that few regions can match.[3][2]

Aberdeen is home to 75% of the world's subsea engineering capability, a statistic that speaks directly to the needs of both offshore wind (foundation installation, inter-array cabling, subsea power systems) and CCUS (CO_2 pipeline infrastructure, subsea injection wells, offshore monitoring). This capability is embedded in hundreds of SMEs, specialist service firms, and engineering consultancies.[3]

3.2 Key Competitive Advantages by Domain

Floating Offshore Wind

Scotland, and NES in particular, is the global centre of gravity for floating offshore wind development. Planned Scottish floating wind projects make up 31% of the global floating pipeline. The Kincardine project (50 MW, commissioned 2018-2021) is the world's largest operational floating wind farm, and Green Volt (560 MW) is consented as Europe's first commercial-scale floating project. The Floating Wind Innovation Centre (FLOWIC) in Aberdeen provides world-class R&D, testing, and qualification services for cables, anchors, and mooring lines.[34][35][36]

For European floating wind markets such as Norway's Utsira Nord, France's rapidly expanding programme (Méditerranée Grand Large, and now the 5 GW floating component of the April 2026 AO9/AO10 mega-tender across the English Channel, Atlantic, and Mediterranean), and Baltic Sea prospects, NES companies with floating substructure fabrication, mooring engineering, dynamic cable design, and installation experience represent an almost unique supply base. The April 2026 French tender is particularly significant as it is the largest near-term floating wind procurement opportunity in Europe.

Subsea Engineering and Umbilicals

The transfer of subsea expertise from oil and gas to offshore wind and CCUS is a natural, high-value transition. Aberdeen-based firms have deep experience in subsea manifolds, flexible pipelines, umbilical systems, ROV operations, and subsea integrity management. These capabilities are critical for floating wind mooring systems, CO_2 injection infrastructure, and offshore hydrogen pipelines.

CCUS and Carbon Management

NES companies have direct involvement in the Acorn CCUS Project at St Fergus, one of the most advanced CCS projects in Europe, directly adjacent to Aberdeen. This provides NES engineering, monitoring, and operational firms with real project experience in carbon storage infrastructure. The skills and methodologies developed in Acorn are transferable to Northern Lights Phase 2 and future European CCUS clusters.[37]

Decommissioning

NES is home to some of Europe's most experienced decommissioning companies, including Global Energy Group (Nigg), Decom North Sea members, and specialist firms in well plugging, topsides cleaning, and infrastructure removal. The UKCS is one of the first offshore basins in the world to decommission at industrial scale, and NES firms have established world-class methodologies and track records. Decom North Sea, headquartered in Aberdeen, supports 220 member companies.[38][39]

Project Management and Engineering Consultancy

Aberdeen is home to a dense cluster of technical engineering and project management firms (Vysus, Wood, Petrofac, Aker Solutions UK, and many specialist consultancies), many of which have already pivoted toward renewables, with Vysus reporting that 60% of its consulting business now comes from the renewables sector.[40]

Port and Fabrication Infrastructure

The Port of Cromarty Firth at Invergordon (with Quay West facility, XL monopile capability), Nigg Energy Park (Europe's largest dry dock, 1,200+ metres of deep-water quayside, heavy lift), the Port of Aberdeen South Harbour, Fraserburgh Harbour (offshore wind O&M), and the proposed Kishorn Port expansion for floating substructure manufacture collectively form one of Europe's strongest offshore fabrication and marshalling clusters.[41][42][40]

Innovation and R&D Ecosystem

The NES region hosts the ORE Catapult, FLOWIC, Robert Gordon University's Institute of Net Zero, and the ETZ, providing world-class testing, validation, and R&D capabilities that attract inward investment from European companies seeking access to unique qualification facilities. The ETZ has already attracted Mooreast (Singapore mooring company setting up Aberdeen manufacturing) and other inward investors targeting the European market.[36][4][3]

Workforce and Skills

Tens of thousands of engineers, technicians, marine professionals, and project managers in NES possess directly transferable skills from oil and gas to offshore renewables. The Fit for Offshore Renewables (F4OR) programme, now operating across Scotland, is actively preparing NES companies for offshore wind contract opportunities.[43][44]

4. Growth Sectors and Country Opportunities for NES Companies

4.1 By Sector

Offshore Wind (Fixed Bottom)

The immediate, highest-volume opportunity. Europe needs to install over 20 GW annually by the late 2020s. NES companies can target: monopile and jacket substructure marshalling, substation fabrication, inter-array cable engineering, HVDC cable and substation supply chain support, O&M base operations, specialist survey services, marine logistics, and condition monitoring. The strongest near-term country opportunities are Germany, Netherlands, Denmark, and Poland.

Offshore Wind (Floating)

The highest-value strategic opportunity for NES companies. The global supply chain for floating wind barely exists at scale. NES has the unique combination of floating substructure design heritage (oil and gas FPSOs and FPUs), deep-water mooring and anchor engineering, dynamic cable supply, and installation vessel operators. Norway (Utsira Nord), France, and potentially Poland and Ireland represent the priority near-term commercial markets. France's strategic importance has been significantly amplified by the 2 April 2026 announcement of a 5 GW floating wind component within the combined AO9/AO10 mega-tender---the largest floating wind procurement in Europe to date, spanning the English Channel, Atlantic, and Mediterranean coasts, with awards targeted by early 2027.

CCUS

A growing opportunity across Norway and the Netherlands with near-term contract potential. NES companies in subsea pipeline engineering, CO_2 compression systems, monitoring and metering, integrity management, and offshore well services are directly relevant to Northern Lights Phase 2 and Porthos expansion. Medium-term opportunities are emerging across Belgium, Germany (industrial CCS clusters), and Spain.

Green Hydrogen

Still largely pre-FID, but the European Hydrogen Bank auctions are beginning to unlock project pipelines. Electrolyzer balance-of-plant engineering, offshore hydrogen pipeline infrastructure, seawater desalination systems, and FEED/EPCM services are areas where NES engineering firms can compete. The Netherlands (Eemshaven hydrogen cluster), Norway, and Portugal/Spain (solar hydrogen) are the most active markets.

Marine Energy (Wave & Tidal)

A specialist niche with limited immediate commercial scale, but Scotland-based Orbital Marine Power (tidal) and Marine Power Systems (wave) are actively involved in European projects funded by Horizon Europe and Interreg. NES companies with marine engineering, subsea cabling, and specialist installation capabilities can support these projects. France (Paimpol-Bréhat tidal site) and the Netherlands are active European tidal/river energy markets.[45][46]

Decommissioning

A large, growing, and relatively near-term contract opportunity. Europe leads global decommissioning with 46.1% market share. Norway and the Netherlands have substantial

decommissioning programmes underway. NES decommissioning companies already operate internationally, with Decom Engineering reporting that 25% of its work is in the North Sea/Europe and 75% overseas. The key is structured market entry into Norwegian and Dutch procurement.[32][38]

Clean Fuels (SAF and Biofuels)

European SAF demand is driven by ReFuelEU Aviation (mandatory 2% blend from 2025, 6% from 2030). The EU Sustainable Transport Investment Plan commits €2.9 billion for aviation and maritime sustainable fuels. NES companies in biochemical engineering, industrial plant design, biomass handling, and EPCM services can target SAF production facilities being developed in France, Germany, Netherlands, Spain, and Sweden---the five countries accounting for 99% of EU SAF supply.[47][48][49]

4.2 By Country: Priority Markets for NES Companies

Germany (Priority Level: Very High)

Europe's largest established offshore wind market with 30 GW target by 2031. Despite auction difficulties, projects are in active FEED/EPC phases. The shift to CfDs from 2026 will restimulate the pipeline. Key NES opportunities: floating foundation supply for future projects, HVDC substation engineering, O&M vessel services, and CCUS supply chain support.

Netherlands (Priority Level: Very High)

The Eemshaven hub is one of Europe's most important offshore wind logistics and assembly centres, used by Vattenfall, Ørsted, RWE, and EnBW. The Netherlands is advancing Porthos CCUS (construction underway) and the Oranje Wind 795 MW farm (offshore hydrogen production planned). NES companies can target: HVDC engineering, CCUS pipeline services, hydrogen production engineering, and O&M services.[50][51]

Norway (Priority Level: Very High)

The most strategically aligned market for NES companies. Cultural and operational similarities, the world's first commercial CCUS operation (Northern Lights) entering Phase 2, and the newly awarded Utsira Nord floating wind projects all create immediate demand. NES decommissioning firms are already well-positioned in Norwegian markets. Priority areas: Northern Lights Phase 2 construction services, Utsira Nord FEED and supply chain, and legacy oil and gas decommissioning.[52]

Denmark (Priority Level: High)

Home to Ørsted (Borkum Riffgrund 3, Thor Wind Farm in development) and the Bornholm Energy Island cross-border project. Denmark's new CfD framework will restart auction pipelines. Esbjerg serves as one of Europe's key offshore wind construction ports. NES companies can target: specialist engineering services, floating wind technology supply (as Denmark begins exploring deeper water sites), and decommissioning in maturing Danish fields.

Poland (Priority Level: High)

The fastest-growing new offshore wind market in Europe. Bałtyk 2 & 3 and Baltica 2 are in active construction preparation; supply chains are being built now. Poland's Sector Deal targets 38-40% local content, but this creates NES opportunity to partner with Polish companies or enter supply chains for non-locally constrained scopes. With PLN 300 billion in offshore wind CAPEX expected by

2040, Poland is a transformational market. NES opportunity: monopile logistics, FEED engineering, marine survey, cable engineering.[19]

France (Priority Level: Very High)

France has commissioned its first floating wind farm (Provence Grand Large) and has major commercial floating projects advancing. The Méditerranée Grand Large (BW Ideol/EDF), Groix & Belle-Île (floating pilot), and the Atlantic fixed-bottom farms (Yeu et Noirmoutier operational) are all active. Most significantly, on 2 April 2026 the French government announced Europe's largest-ever offshore wind tender - a 10 GW mega-procurement created by merging the AO9 (floating) and AO10 (fixed-bottom) rounds into a single competitive process. The tender covers five gigawatts of fixed-bottom capacity and five gigawatts of floating capacity across seven areas in the English Channel, Atlantic, and Mediterranean, with award decisions expected by end-2026 or early 2027. The French Renewable Energy Association welcomed the decision as a transformational step in the country's energy transition. NES floating wind expertise - mooring systems, dynamic cables, deep-water substructures, and harsh-environment installation - is directly aligned with France's floating wind ambitions. The tender's domestic manufacturing requirements also create structured supply chain entry opportunities for NES companies operating through EU legal entities or in consortium with French partners. Marine tidal energy development at Paimpol-Bréhat remains active.

Belgium (Priority Level: Medium-High)

Belgium hosts the HOPE offshore green hydrogen project near Ostend, industrial CCUS development, and continued offshore wind expansion. The Belgian offshore wind zone is compact but productive; long-term opportunities lie in CCUS infrastructure and hydrogen.[22]

Spain and Portugal (Priority Level: Medium)

Primarily a green hydrogen and SAF market opportunity. The HyDeal España project (9.5 GW solar, 7.4 GW electrolyzers) is at EPC stage. Galp's Sines facility is scaling. Portugal and Spain together represent significant EPCM and engineering opportunity for large-scale hydrogen plants. Portuguese and Spanish offshore wind is growing, with floating wind being explored for deeper Atlantic waters.[25]

5. Key Offshore Low Carbon Projects in Non-UK Europe

The following tables list major confirmed projects at FEED to EPC stages relevant to NES supply chain targeting.

Fixed Offshore Wind

Project	Country	Developer(s)	Capacity	Est. CAPEX	Status	Expected COD	Key Opportunities
He Dreiht	Germany	EnBW, Allianz	960 MW	€2.4 billion	EPC – first power Nov 2025	Summer 2026[53]	O&M, cable services
Borkum Riffgrund 3	Germany	Ørsted, Glenmont	913 MW	~€2.5 billion	EPC – commissioning	Q1 2026[53]	O&M services
Nordlicht 1 & 2	Germany	Vattenfall	1,600 MW	~€5 billion	FEED/EPC preparation	2029–30	HVDC substations, foundations
Thor Wind Farm	Denmark	RWE	1,000 MW	~€3 billion	FEED/EPC preparation	2027[53]	Foundation supply, cable engineering
Hesselø	Denmark	Copenhagen Infrastructure Partners	1,000 MW	~€3.5 billion	Permitting/FEED	2029–30	HVDC engineering, survey services
North Sea South	Denmark	TBA	800 MW	TBC	Tender Nov 2025	2030+	Future supply chain
Bornholm Energy Island	Germany & Denmark	Cross-border	3,000 MW	€645M EU grant (total TBC)	Agreement Jan 2026 – FEED[9]	2033+	Full supply chain
Bałtyk 2 & 3	Poland	Equinor, Polenergia	1,440 MW	~€7.2 billion	FID 2025 – construction[19]	2028–29	Monopile logistics, cable engineering
Baltica 2	Poland	PGE, Ørsted	1,500 MW	~€6.5 billion	FID 2025 – construction	2028–29[19]	Cable, foundations, O&M
Baltica 1	Poland	PGE, Ørsted	1,560 MW	~€5 billion	Development – auction H2 2025	2030–31[19]	Future FEED/EPC
Yeu et Noirmoutier	France	Ocean Winds	500 MW	~€1.5 billion	EPC – commissioning	End-2025[53]	O&M base services
IJmuiden Ver (C, D)	Netherlands	RWE/ENECO + others	2,000 MW	~€6–8 billion	Permitting/FEED	2030–32[54]	Full supply chain
Hollandse Kust West (5 & 6)	Netherlands	CrossWind (Shell/Eneco)	1,500 MW	~€5 billion	Development/FEED	2027–29	Cable, O&M
AO9/AO10 Combined Mega-Tender (5 GW fixed-bottom)	France	Multiple (12 pre-qualified developers incl. TotalEnergies, EDF, Iberdrola, RWE, Ocean Winds)	5,000 MW (fixed-bottom component)	TBC (est. €12–15 billion total capex)	Tender launched April 2026 – award by end-2026/early 2027	2032–2035 (est.)	Foundation supply, cable engineering, HVDC substations, marine survey, O&M base development

Floating Offshore Wind

Project	Country	Developer(s)	Capacity	Est. CAPEX	Status	Timeline	Key Opportunities
Utsira Nord (2 sites)	Norway	Equinor/Vårgrønn + Harald Hårfagre/EDF	2 × 500 MW	~€4–6 billion	Project areas awarded Dec 2025; Impact Assessment phase	FEED ~2027; FID ~2029; COD	Mooring, dynamic cables, substructure, FEED engineering

Project	Country	Developer(s)	Capacity	Est. CAPEX	Status	Timeline	Key Opportunities
						2032–34[15]	
Méditerranée Grand Large	France	EDF Renewables, BW Ideol	TBC (commercial scale)	TBC	Development/pre-FEED	2028 onwards[18]	Floating substructure, installation
Groix & Belle-Île	France	Eolfi/wpd	30 MW (pilot)	~€150M	Under development	2026–27	Mooring, cables, installation
Wind gathering Baltic (future sites)	Poland	Various	Multi-GW potential	TBC	Pre-development	2030s[55]	Floating foundation supply
AO9/AO10 Combined Mega-Tender (5 GW floating)	France	Multiple pre-qualified developers (TotalEnergies, EDF, Iberdrola, RWE, BayWare, Elicio, Ocean Winds + others)	5,000 MW (floating component)	TBC (est. €15–20 billion floating capex)	Tender launched April 2026 – competitive dialogue underway; award by end-2026/early 2027	FID ~2028–2029; COD 2033–2036 (est.)	Floating substructures, mooring systems, dynamic cables, deepwater installation, FEED engineering – prime NES opportunity

CCUS

Project	Country	Operator(s)	Scale	Est. CAPEX	Status	Timeline	Key Opportunities
Northern Lights Phase 1	Norway	Equinor, Shell, TotalEnergies	1.5 Mt CO_2/yr	NOK 7.5 billion	Operational 2024/25[56]	Ongoing	Monitoring, integrity management
Northern Lights Phase 2	Norway	Equinor, Shell, TotalEnergies	5 Mt CO_2/yr	NOK 7.5 billion (Phase 2 grant + equity)	FID March 2025 – under construction	2028[52]	Subsea pipelines, injection wells, storage monitoring, topside engineering
Porthos	Netherlands	Gasunie, EBN, Air Liquide, Shell, etc.	2.5 Mt CO_2/yr	~€700 million	Under construction (pipeline Sept 2024)	2026[51]	O&M, measurement, expansion design
Aramis (Porthos expansion)	Netherlands	Gasunie/partners	5–10 Mt CO_2/yr	~€2–3 billion	FEED stage	Late 2020s[51]	Full FEED/EPC supply chain
HOPE Offshore H_2/CO_2	Belgium	Lhyfe, Plug, Strohm, others	10 MW H_2	€20M EU grant	Under development	2026[22]	Offshore hydrogen systems
Longship/Brevik (Heidelberg)	Norway	Heidelberg Materials/Norwegian State	0.4 Mt CO_2/yr	~€2.1 billion	Operational 2025	2025 onwards[56]	Operational support services

Green Hydrogen

Project	Country	Developer	Scale	Status	Timeline	NES Opportunity
Eemshaven H_2 Hub (Vattenfall)	Netherlands	Vattenfall	TBC GW scale	Development, Dutch govt €700M grant	2027 onwards[50]	Electrolyzer BoP engineering, water systems
Eemshydrogen (RWE)	Netherlands	RWE	50 MW electrolyzer	Under construction	2027[50]	BoP engineering, commissioning

Project	Country	Developer	Scale	Status	Timeline	NES Opportunity
Sines H_2 (Galp/Plug Power)	Portugal	Galp, Plug Power	100 MW electrolyzer	Installed Jan 2026	Operational 2026[24]	O&M services, expansion
HyDeal España	Spain	ArcelorMittal, Enagás, Fertiberia	7.4 GW electrolyzers	EPC partners signed 2026	Production start 2025–26[25]	BoP engineering, pressure systems, EPCM
EU Hydrogen Bank 3rd Auction (various)	EU multi-country	Various	€1 billion round	Procurement planned late 2025/2026	Projects FID within 2.5 years[29]	Technology supply, EPCM

Marine Energy (Wave & Tidal)

Project	Country	Developer	Scale	Status	Timeline	NES Opportunity
EURO-TIDES (Orbital Marine)	France/Belgium	Orbital Marine Power + partners	~9.6 MW array	Horizon Europe funded, development	2025–2028[45]	Turbine supply, marine ops
SHINES (HydroWing, TidalKite)	France/Netherlands	Inyanga, SeaQurrent, others	600 kW +	ERDF-funded, Jan 2025–Dec 2028	2025–2028[46]	Marine installation, operations
Paimpol-Bréhat tidal site	France	Multiple developers	Multi-MW	Test site operational	Ongoing	Marine services, subsea cables

Decommissioning

Project/Programme	Country	Operator	Value	Status	NES Opportunity
Statfjord A/B/C Decom	Norway	Equinor	Multi-billion NOK	Planning/phased	Engineering, heavy lift preparation
Various NCS late-life assets	Norway	Multiple	NOK ~billions annually	Active programme	Well P&A, topsides removal, structural
North Sea NL Decom programme	Netherlands	Various	Multi-€ billion	Active programme	Subsea removal, inspection, recycling
Norwegian/Dutch field decom	Norway/Netherlands	Various	~25-30% of global NW Europe	Ongoing 2025–2040[39]	Full decommissioning services

6. Policy, Regulations, Local Content, Trade Barriers, and Certification

6.1 The EU Net-Zero Industry Act (NZIA)

The EU Net-Zero Industry Act, which entered into force on 29 June 2024, is a landmark piece of legislation that directly affects the competitive landscape for NES supply chain companies seeking European contracts. Its most significant practical impact is the introduction of mandatory non-price criteria in renewable energy auctions and public procurement, effective from 30 December 2025:[57]

- At least 30% of annual renewable capacity tendered per EU Member State (or a minimum of 6 GW) must include non-price pre-qualification criteria covering responsible business conduct, cybersecurity, delivery capability, and supply chain resilience[58][59]
- The resilience criterion is automatically triggered when a single country supplies more than 50% of Europe's demand for a specific technology component, or 40% with a 10-point increase over two consecutive years. This is directly aimed at reducing dependence on Chinese supply chains[58]
- In public procurement, supply source diversification is mandated when there is high dependency on specific suppliers[57]
- No more than 50% of the value of specific net-zero technology main components can come from a single third country[59]

Implications for NES Companies: The NZIA creates a powerful structural tailwind for UK/European suppliers as European project developers must now demonstrate supply chain resilience across their projects. NES companies with proven European manufacturing, engineering, and service delivery credentials should actively position themselves in response to these criteria.

6.2 Country-Specific Local Content Requirements

Poland

Poland has the most explicit offshore wind local content regime among non-UK European markets. The Polish Sector Deal sets targets for 38-40% local content in the Bałtyk projects. However, NES companies are not directly disadvantaged by Polish local content requirements, provided they partner with or subcontract to Polish firms, or operate in scopes that are internationally tendered (e.g., monopile manufacturing, HVDC systems).[19]

Norway

Norway does not have formal local content requirements for offshore wind, but its tender process for Utsira Nord included qualitative criteria requiring applicants to demonstrate industrial development commitments and supply chain localisation plans. Norwegian relationships and in-country presence are practically important, but there is no legal barrier to NES companies competing.[16]

France

France has introduced "social bonus" mechanisms in offshore wind tenders that reward developers for local economic commitments, but there is no prohibition on EU/EEA suppliers. Post-Brexit, UK

firms are not classified as EU suppliers. Critically, the 2 April 2026 combined AO9/AO10 mega-tender explicitly incorporates requirements to utilise domestic and European manufacturing capacities, designed to reduce reliance on Chinese-sourced components---a policy directly aligned with NZIA resilience criteria. NES companies should be aware that while this requirement does not exclude UK suppliers by law, demonstrating EU manufacturing presence or partnerships with French/EU-based tier-one contractors will be important for competitive positioning in this tender process.

Germany, Netherlands, Denmark

No formal local content requirements for offshore wind, but the NZIA non-price criteria are being embedded into national auction designs from late 2025. Projects increasingly require supply chain sustainability and resilience plans, which NES firms should prepare as standard commercial documentation.[60]

6.3 Trade Barriers, Tariffs, and Certification (Post-Brexit)

The UK-EU Trade and Cooperation Agreement (TCA) provides for zero tariffs on goods with sufficient Rules of Origin (RoO) content, but the RoO requirements introduce complexity for NES supply chain companies:

- Goods: Zero tariffs generally apply, but companies must demonstrate sufficient UK/EU content. For manufactured components, this can require significant documentation and compliance effort
- Services: There is no free movement of services between the UK and EU post-Brexit. NES service companies operating in EU member states may need to establish local entities or comply with national professional qualifications frameworks
- CE Marking: All equipment and products sold or used in EU markets must carry CE marking under relevant EU Directives (Machinery, Pressure Equipment, ATEX, Low Voltage, etc.). UK UKCA marking is not accepted in EU markets. This is a hard requirement NES companies must address through either third-party EU Notified Bodies or by maintaining existing CE certifications[61]
- Temporary Worker Mobility: NES companies deploying engineers and technicians in EU countries must comply with EU Posted Workers Directive rules, including prior notification in host countries (particularly France and Germany)
- VAT and Fiscal Compliance: Operations in each EU member state may trigger VAT registration obligations and local tax compliance requirements
- Vessel Flagging and Port State Control: Marine vessels operating in EU waters must comply with EU/Paris MOU requirements; some EU countries have cabotage restrictions on non-EU flagged vessels for certain operations

Practical Mitigation: Many NES companies are addressing these barriers by establishing EU subsidiary offices (Ireland and Netherlands are popular choices due to language and legal frameworks), entering consortium arrangements with established EU-based primes, and proactively certifying products/services under EU conformity frameworks.

6.4 ReFuelEU Aviation and Clean Fuels Policy

The ReFuelEU Aviation Regulation mandates 2% SAF blending in 2025, rising to 6% in 2030, with a synthetic SAF (eSAF) component increasing to 0.7% by 2030. This is creating investment demand across France, Germany, Netherlands, Spain, and Sweden for SAF production capacity. The EU Sustainable Transport Investment Plan (STIP) provides €2.9 billion for aviation and maritime sustainable fuels. NES firms in biochemical engineering, industrial process design, and project management can target EPCM contracts for SAF facilities.[48][49][47]

7. The Competitive Environment in European Offshore Low Carbon

7.1 Offshore Wind: Tier 1 OEM and System Integrators

The European offshore wind market is dominated at the turbine and system level by a concentrated group of global OEMs and major EPC contractors:

- Turbine OEMs: Vestas (Denmark), Siemens Gamesa (Spain/Germany), and GE Vernova are the dominant offshore turbine suppliers. All three are under severe margin pressure and actively seeking supply chain innovation and cost reduction[5]
- EPCI Contractors: Heerema, Allseas, Subsea 7, DEME, Van Oord, and Jan De Nul dominate large offshore installation and cable-laying contracts. These are the critical Tier 1 contractors through which NES companies can gain sub-contract access
- Foundation Manufacturers: EEW (Germany), Bladt Industries (Denmark), CS Wind, SIF (Netherlands), and Steelwind Nordenham are the key monopile/jacket manufacturers
- Cable Manufacturers: Prysmian (Italy), Nexans (France), and NKT (Denmark) dominate HVDC cable supply

Chinese Competition: A rising concern across the sector is the growing role of Chinese manufacturers (Mingyang, Dongfang, CSSC) in turbine supply and component manufacturing. The NZIA resilience criteria are specifically designed to limit Chinese dependency, creating a structural advantage for European (and UK) suppliers.[58][5]

7.2 CCUS and Hydrogen

In CCUS, the leading contractors include Aker Solutions (in line for Northern Lights Phase 2 expansion), TechnipFMC, Subsea 7, SLB (Schlumberger), and Saipem. The NES competitive position here is strong: Aberdeen-based Aker Solutions, Wood Group, and multiple subsea specialists have direct CCUS project credentials.[28][32]

In green hydrogen, large-scale EPC contractors including Technip Energies, Worley, and major industrials (Air Liquide, Linde, Siemens Energy) are establishing positions. NES companies can most effectively compete as sub-contractors or EPCM partners, especially in electrolyzer balance-of-plant, pressure systems, and marine/offshore delivery.

7.3 Decommissioning Competition

The offshore decommissioning sector is served by a mix of large integrated contractors and specialist service firms. Norwegian AF Gruppen (AF Offshore Decom) and Heerema are dominant at the top tier. Scottish and NES firms compete strongly at the mid-tier---particularly in well P&A, topsides preparation, waste management (NORM handling), inspection, and advisory services. Decom Engineering (Aberdeen HQ) operates across 26 countries and is a benchmark for NES export success in decommissioning.[62][63][64][38]

7.4 The SME Competitive Challenge

For NES SMEs, the most acute competitive challenge is not technical capability---it is commercial intelligence, relationship capital, and the ability to sustain business development costs in new European markets. Large European primes prefer established suppliers with EU in-country presence, relevant EU certifications, and local language commercial teams. The F4OR programme, ETZ, AREG, and Scottish Development International provide critical support in overcoming these barriers, but systematic and targeted market development remains essential.

8. Conclusions and Recommendations for NES Energy Supply Chains

8.1 Strategic Conclusions

The European offshore low carbon energy market represents the single largest near-term commercial opportunity for NES energy supply chain companies. The January 2026 Investment Pact, the activation of CfD frameworks across Germany, Denmark, and the Netherlands, the award of Utsira Nord in Norway, the Bałtyk FIDs in Poland, and the scaling of Northern Lights CCUS collectively constitute a multi-decade, multi-sector pipeline worth hundreds of billions of euros in supply chain value. The 2 April 2026 French government announcement of a 10 GW offshore wind mega-tender, combining AO9 (floating) and AO10 (fixed-bottom) into a single competitive round with awards by end-2026 or early 2027, adds a further decisive market signal. France now joins Norway as one of the most strategically important markets for NES companies with floating wind expertise, and the French tender's scale (10 GW) surpasses the entire current installed offshore wind base in France.

NES companies hold genuine and defensible competitive advantages in floating offshore wind, CCUS services, decommissioning, subsea engineering, and harsh-environment offshore operations---advantages that are materially scarce across Europe. The EU's NZIA is reshaping the European procurement landscape to reward supply chain resilience and non-Chinese-sourced components, structurally benefiting UK/NES suppliers even in the post-Brexit context.

The primary barriers are not technical or commercial competitiveness, they are market access, EU certification, in-country presence, and commercial relationship development. These are solvable challenges with the right strategic approach.

8.2 Priority Recommendations

1. Target Norway as the Beachhead Market

Norway shares an operational culture, regulatory heritage, and offshore engineering DNA most closely aligned with NES. The Northern Lights Phase 2 construction programme (FID March 2025, operational 2028), the Utsira Nord floating wind programme, and Norway's intensifying decommissioning pipeline provide immediate, high-value, and contractually accessible opportunities. NES companies should establish direct relationships with Equinor, Aker Solutions, AF Gruppen, and the Norwegian Supply Industry association (INTSOK/Norwep).

2. Position for the Polish Offshore Wind Build-out

Poland's Bałtyk 2 & 3 and Baltica 2 projects are in active construction procurement now. With €13.7 billion committed in FIDs alone, and supply chain development actively sought by Equinor and Ørsted, NES companies in monopile logistics, FEED engineering, cable engineering, and marine survey should prioritise immediate engagement with these developers' Polish procurement teams. Considering early-stage partnership with Polish firms to meet local content expectations is advisable.

3. Pursue the Dutch CfDs and Hydrogen Cluster

The Netherlands' CfD framework transition (2027) will unlock a major new project wave, and the Eemshaven hydrogen cluster is the most advanced green hydrogen hub in Europe outside of dedicated pilot projects. NES engineering firms with hydrogen BoP and HVDC engineering

credentials should engage Dutch project developers and the Netherlands Enterprise Agency (RVO) now, while projects are still in FEED and relationship formation stages.

4. Engage the France 10 GW Mega-Tender NOW

The 2 April 2026 announcement of France's combined AO9/AO10 mega-tender is the most time-sensitive commercial opportunity highlighted in this update. With 5 GW of floating wind and 5 GW of fixed-bottom capacity across seven project areas, and award decisions targeted by end-2026 or early 2027, the commercial dialogue phase is beginning immediately. NES companies with floating substructure, mooring, dynamic cable, or deep-water installation capabilities should prioritise engagement with the pre-qualified developer consortia (including TotalEnergies, EDF Renewables, Iberdrola, RWE, Ocean Winds, BayWa re, and Elicio) and with Tier-1 EPCI contractors likely to lead construction scopes. The tender's domestic manufacturing requirements make it essential for NES companies to operate through, or in partnership with, EU-registered entities. France's floating wind programme, extending from the Mediterranean to the Atlantic and English Channel, represents the largest near-term floating wind commercial opportunity in Europe after Norway.

5. Establish EU Legal Presence

The single most impactful structural step for NES companies with European ambitions is establishing an EU subsidiary---ideally in Ireland (English language, common law heritage, strong energy sector) or the Netherlands (proximity to key hubs, established O&G/renewable engineering community). This resolves service mobility issues, simplifies CE marking alignment, and signals market commitment to European partners.

6. Prioritise CE Marking and EU Certification

All NES product and equipment manufacturers seeking European sales must ensure CE marking compliance is fully current and EU-auditable. This is a non-negotiable market access requirement and should be treated as a commercial investment, not a regulatory burden.

7. Engage the F4OR and ETZ European Export Programmes

The F4OR Scotland programme, delivered through ORE Catapult with ETZ and Crown Estate Scotland funding, provides active supply chain development support for NES companies targeting offshore renewables. NES companies should participate in and leverage these programmes for European market intelligence, buyer introductions, and supply chain readiness assessment. ETZ's international export development activity is specifically focused on helping NES firms win business in European offshore low carbon markets.[4][43]

8. Build Floating Wind Credentials Now

The global floating offshore wind market - Norway, France, Baltic Sea - is moving into multi-GW commercial procurement faster than previously anticipated. France's 2 April 2026 announcement of a 5 GW floating component within its combined AO9/AO10 mega-tender, with awards targeted by early 2027, means this is no longer a 'future opportunity'---it is an active, immediate commercial procurement. The window to establish credentials and relationships is closing rapidly. NES companies should actively engage Equinor's Utsira Nord team, BW Ideol/EDF's Méditerranée Grand Large team, and developers active across France's seven new tender areas (English Channel, South Atlantic, Mediterranean) to establish material supply and engineering relationships before commercial procurement closes.

9. Form Cross-Sector Consortia

European procurement increasingly favours consortium bids that package multiple complementary services. NES companies should form structured consortia - for example, a floating wind consortium combining a mooring engineering firm, a dynamic cable specialist, an offshore installation services company, and a project management consultancy - to offer European developers genuinely integrated supply chain packages that compete at the prime contract level rather than purely as sub-contractors.

10. Leverage the NES CCUS Track Record

The St Fergus Acorn project and NES firms' involvement in Northern Lights Phase 1 monitoring and services provide unique credentials for the European CCUS market. NES companies should document these credentials systematically and use them to pursue sub-contract roles in Porthos O&M (Netherlands), Northern Lights Phase 2 (Norway), and emerging CCUS clusters in Belgium and Germany.

11. Monitor Auction and Procurement Calendars Actively

Europe's offshore wind procurement landscape is moving rapidly. CfD auctions in Denmark (North Sea Mid, Hesselø), Germany (2026), and the Netherlands (2027), plus Utsira Nord FEED procurement in Norway (anticipated 2027), and Poland's Baltica 1 auction (H2 2025) all represent specific near-term triggers for supply chain engagement. Most urgently, the France AO9/AO10 combined 10 GW mega-tender has now been formally launched (April 2026), with the competitive dialogue process underway and award decisions expected by end-2026 or early 2027. For NES companies targeting floating wind, this is the single most time-critical procurement event in Europe in 2026. NES companies should assign dedicated business development resource to track these events and respond systematically.

This report was originally prepared in March 2026 and updated on 4 April 2026 to incorporate the French government's 2 April 2026 announcement of a 10 GW combined AO9/AO10 offshore wind mega-tender. All other content is based on available public domain information, industry reports, regulatory announcements, and press releases as of March 2026. Market conditions and project timelines are subject to change. Commercial decisions should be based on up-to-date project-specific intelligence and professional legal and financial advice.

Please visit ExportCentral AI for access to our Energy Transition Weekly Newsletter and our growing library of free Global Market Intelligence Reports.

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