

ENERGY TRANSITION WEEKLY

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Global Offshore Low-Carbon Energy Intelligence for North East Scotland Supply Chain Companies

EDITOR'S BRIEF

The week of 3–10 April 2026 has been defined by two powerful and converging forces: the accelerating impact of the Middle East war on global energy security calculations, and a wave of consequential offshore wind and hydrogen policy decisions across Europe.

France launched a landmark 12 GW renewable tender anchored in energy security imperatives, while the Netherlands doubled its 2026 offshore wind licensing round to 2 GW. TenneT and National Grid formally advanced the LionLink hybrid interconnector — a first-of-its-kind project that will shape the future North Sea offshore grid architecture. At home, the ScotWind pipeline suffered another setback as Ocean Winds handed back the 500 MW Arven South lease, underlining the urgent need for transmission charging reform as AR8 approaches in July 2026.

The Iran conflict continues to fundamentally reshape global energy security priorities. The IEA has characterised it as "the greatest global energy security challenge in history." As of this week, Brent crude has exceeded \$120/barrel, European gas benchmarks have nearly doubled, and Qatari LNG exports remain disrupted following damage to the Ras Laffan complex on 18 March.

Paradoxically, the crisis is proving to be a powerful accelerant for the energy transition: IRENA confirmed that renewables accounted for 85.6% of all new global energy capacity added in 2025, and leading analysts, governments and the UN Secretary-General have called for an urgent acceleration of clean energy deployment in direct response to the conflict.

KEY NUMBER: 5,149 GW — global renewable energy capacity at end-2025, up 692 GW (+15.5%) in a single year. Wind added a record 158.7 GW. The Iran war is set to add further geopolitical momentum to these already-record growth rates. (Source: IRENA Renewable Capacity Statistics 2026, published April 2026)

PRIORITY ACTION: North East Scotland supply chain companies should immediately assess their positioning for AR8 (July 2026), review how France's new "resilience" content criteria create European supply chain opportunities and monitor how transmission charging reform decisions will determine which ScotWind projects proceed to FID.

PRIORITY ACTION: Assess export opportunities in France (10 GW tender, European content requirements), Netherlands (2 GW round), and emerging Asia-Pacific markets accelerating renewables in response to the Iran energy crisis.

1. GLOBAL OFFSHORE WIND PULSE

1.1 Europe: Leasing, Tendering, and Grid Architecture

FRANCE LAUNCHES 12 GW RENEWABLE TENDER WITH OFFSHORE WIND AT THE CORE (2–5 April 2026): In one of the most significant European energy policy announcements of the year, the French government launched a 12 GW renewable energy tender comprising seven offshore wind projects totalling 10 GW, plus 1.2 GW of solar and 0.8 GW of onshore wind. The announcement was explicitly framed as an energy security response to the Iran war, with Finance Minister Roland Lescure noting France aims to "continue and accelerate" its clean energy programme while reducing dependence on

imported fossil fuels. The tenders align with France's legally binding target of 15 GW of offshore wind by 2035 (up from 2 GW today), rising to 45 GW by 2050. Crucially, France has introduced "resilience criteria" that cap Chinese-origin components at four of nine strategic categories and limit Chinese permanent magnets to 50% of turbine content. This represents a structural shift in European procurement strategy that actively favours UK and Scottish manufacturers. Initial project selections are expected by end-2026 or early 2027.

NETHERLANDS DOUBLES 2026 OFFSHORE WIND TENDER TO 2 GW (6–8 April 2026): The Dutch government confirmed it will open the IJmuiden Ver Gamma-B (1 GW) tender simultaneously with the previously announced Gamma-A (1 GW) site, effectively doubling its 2026 licensing round. Both sites connect to the same TenneT offshore platform, maximising grid efficiency. Applications close December 2026; permits expected Q1 2027; commissioning around 2032. Total government support under the TOWOZ scheme is €7.9 billion. From 2027, the Netherlands will shift to a Contracts for Difference (CfD) framework, providing greater long-term revenue certainty for developers and their supply chains.

LIONLINK: UK–NETHERLANDS HYBRID INTERCONNECTOR ADVANCES (2–7 April 2026): TenneT and National Grid Ventures signed a Joint Development Agreement (JDA) on 2 April, formally advancing LionLink — a first-of-its-kind hybrid offshore interconnector linking the UK and the Netherlands through the Nederwiek 3 offshore wind farm. Capacity: 2 GW. Target commissioning: early 2030s. The project triggered the Dutch government's announcement on 7 April of a new dedicated offshore electricity bidding zone — an innovative market mechanism underpinning offshore-generated wind power export. A UK Development Consent Order (DCO) application is planned for later in 2026. LionLink marks a fundamental evolution in how offshore wind is integrated into national grid architectures and will define how the entire North Sea basin is managed over the next decade.

DIEPPE-LE TRÉPORT CONSTRUCTION MILESTONE (1 April 2026): The 496 MW (62-turbine) Dieppe-Le Tréport offshore wind project in northern France reached its halfway point, with 31 of 62 jacket foundations installed. Turbine installation using Siemens Gamesa 8 MW units is scheduled for 2026. The project is co-developed by Ocean Winds (EDP Renewables / Engie), Sumitomo Corporation, and Banque des Territoires.

RWE–ASML PPA EXPANDED (3–7 April 2026): RWE and semiconductor giant ASML expanded and extended their Power Purchase Agreement to 2038, covering approximately 130 MW of installed renewable capacity. The deal draws on the Northwester 2 offshore wind farm in Belgium and the 795 MW OranjeWind project in the Netherlands (offshore construction starting 2026; commissioning 2028). The agreement signals the growing role of corporate PPAs as structural drivers of offshore wind demand, particularly from digitally intensive industries facing surging electricity requirements.

1.2 UK and Scotland: ScotWind Under Pressure

OCEAN WINDS RETURNS ARVEN SOUTH SCOTWIND LEASE (2–3 April 2026): Ocean Winds formally confirmed it is handing back the 500 MW Arven South floating offshore wind lease to Crown Estate Scotland. Three overlapping barriers were cited: (1) absence of a viable grid connection; (2) transmission charging adding up to 30% to project costs for northern Scottish sites; (3) sustained opposition from fishing industry stakeholders. The 1.8 GW Arven North project will continue, planned incrementally via the proposed Shetland 2 HVDC subsea link. This is the second significant ScotWind lease surrender in recent months. The West of Orkney 2 GW project (Corio/TotalEnergies/RIDG) remains paused since January 2026 following £100 million of development spend. Critically, none of the 19 ScotWind projects secured a CfD in AR7.

TRANSMISSION CHARGING: THE DEFINING ISSUE FOR SCOTWIND (ongoing into this week): Transmission charging has become the central constraint on Scotland's offshore wind development pipeline. Projects north of the central belt face annual charges of up to £54.3 million, adding as much as 30% to total project costs versus equivalent projects in southern England. Scottish Renewables has called for "immediate action" from UK Government and Ofgem before AR8, including a temporary fix for existing and new generators plus "greater certainty on grid connection dates." With AR8 brought forward to July 2026, the window for reform is extremely tight. This is now the single most important commercial question for North East Scotland supply companies with exposure to ScotWind projects.

UK REMOVES OFFSHORE WIND IMPORT TARIFFS (effective 1 April 2026): The UK Department for Business and Trade's elimination of import tariffs on 33 industrial goods used in offshore wind manufacturing is now live. The measure covers cables, blades, and other components and is designed to reduce costs for UK manufacturers ahead of AR8. However,

industry observers caution that port capacity constraints, grid connection backlogs, consenting delays, and competition from Chinese imports remain structural bottlenecks that tariff removal alone cannot resolve.

1.3 Global Market Intelligence

IRENA RENEWABLE CAPACITY STATISTICS 2026 (released April 2026): Global renewable energy capacity hit 5,149 GW by end-2025, following a record addition of 692 GW (+15.5%). Renewables accounted for 85.6% of all new energy capacity added worldwide last year. Wind contributed a record 158.7 GW (+14%). The Middle East recorded its strongest annual growth at +28.9%. IRENA Director-General Francesco La Camera noted: "Countries that invested in the energy transition are weathering this [Iran] crisis with less economic damage, as they boost energy security, resilience, and competitiveness."

TGS 4C GLOBAL MARKET OVERVIEW (March 2026): Global offshore wind CODs are expected to reach 17 GW in 2026, bringing global installed capacity to 103.4 GW by year-end. AR7 alone awarded 8.4 GW in the UK. Global offtake awards are projected at 19.6 GW in 2026, with Final Investment Decisions at 20.3 GW. However, the global 2030 offshore wind forecast (ex-China) has been revised down 17% year-on-year to 120 GW, reflecting longer-term execution challenges. The Iran conflict is specifically cited as a geopolitical variable influencing timelines.

2. THE MIDDLE EAST WAR: IMPACT ON THE GLOBAL OFFSHORE LOW-CARBON SECTOR

SITUATION AS OF 10 APRIL 2026: The US-Israel operation against Iran (launched 28 February 2026) has triggered the largest energy supply disruption in modern history. The Strait of Hormuz has been effectively closed since early March, blocking approximately 20% of global oil and LNG supply. Brent crude exceeded \$120/barrel after Israeli strikes on the South Pars gas field (18 March). Qatar declared force majeure on all LNG exports; the Ras Laffan complex suffered a 17% capacity reduction with a 3–5-year repair timeline. European TTF gas benchmarks nearly doubled to €60/MWh by mid-March against a backdrop of storage at just 30% of capacity after a harsh winter.

2.1 The Energy Transition Dimension

RENEWABLES AS THE STRATEGIC RESPONSE (2–8 April 2026): The Iran crisis is now widely characterised as an accelerant rather than a barrier to the global energy transition. IRENA Director-General Francesco La Camera stated on 2 April: "A more decentralized energy system, with a growing share of renewables and more market players, is structurally more resilient." IEA Executive Director Fatih Birol said: "I anticipate that one of the responses to this crisis will be a hastening of renewable energy adoption." France's Finance Minister explicitly cited the Iran war in justifying the 12 GW renewable tender package launched on 2 April. Analysis at CeraWeek confirmed that investment intentions in clean energy are strengthening, focused on energy security rather than climate targets per se. On 8 April, France 24 reported that Asian economies are treating the shock as a catalyst to fast-track solar, wind, and storage investments.

EU POLICY RESPONSE: The European Council reaffirmed on 19 March that energy transition remains "the most effective strategy" for greater autonomy and lower energy prices. EU Energy Commissioner Jørgensen urged MEPs to back an ambitious agreement on European grid revamps and interconnections. European Commission President von der Leyen noted the EU is spending an additional €3 billion every 10 days on hydrocarbon imports. The European Commission has advised member states to fill gas storage early. The EU-level debate on European industrial sovereignty for energy supply chains has intensified significantly this week.

2.2 Implications for the Offshore Low-Carbon Supply Chain

The Iran crisis has a complex, multi-layered impact on the offshore low-carbon sector. For North East Scotland companies, the net implications are broadly positive in the medium term, with some short-term cost pressures to manage:

- **ACCELERATED INVESTMENT COMMITMENTS:** France's 12 GW tender, the Netherlands' doubled 2 GW round, and the LionLink JDA are all explicitly or implicitly driven by energy security urgency. More projects = more supply chain demand.
- **COST INFLATION RISK:** Brent >\$120/barrel and disrupted LNG supply chains create short-term cost pressures for project logistics, marine fuel, and fabrication. Review marine fuel cost exposure and supply chain contingency arrangements.
- **EUROPEAN CONTENT CRITERIA STRENGTHENED:** France's "resilience" procurement rules limiting Chinese components are directly driven by energy sovereignty concerns amplified by the Iran war. This creates a structural opening for UK and Scottish manufacturers.
- **HYDROGEN ECONOMICS IMPROVED:** Higher natural gas prices improve the competitiveness of green hydrogen relative to blue and grey alternatives, potentially accelerating green hydrogen projects.
- **NORTH SEA OIL & GAS DEBATE REOPENED:** Higher oil prices and UK energy security debate are reopening discussions about North Sea investment and the Energy Profits Levy. Companies serving both oil & gas and energy transition may see dual-market opportunities.
- **ASIAN MARKET ACCELERATION:** Japan, South Korea, Taiwan, and Southeast Asia are fast-tracking renewables investment in direct response to the crisis. NE Scotland firms with deep-water and offshore expertise have strong competitive positioning in these markets.

3. HYDROGEN AND CCUS DEVELOPMENTS

3.1 UK Hydrogen: HAR2 and the Path to Delivery

The UK's Hydrogen Allocation Round 2 (HAR2) remains in progress with approximately 765 MW shortlisted, with decisions on project support expected by mid-2026. Policy challenges continue: BP's withdrawal from H2Teesside in late 2025 has raised questions about the twin-track blue/green hydrogen model. The 5 GW CCUS-enabled blue hydrogen target by 2030 is now at risk according to sector analysts. Four energy companies — National Gas, Centrica, Equinor, and SSE Thermal — are competing for approximately £500 million in government funding to develop the UK's first regional hydrogen transport and storage network in the Humber area. Hydrogen Week UK took place the week of 18 May 2026; the OEUK North Sea CCS and Hydrogen Summit is scheduled for 1–2 June 2026 in Edinburgh — a key event for NE Scotland supply chain firms.

3.2 CCUS Pipeline and Acorn

The global CCUS market continues to advance, with 42 projects having started operations in 2025, increasing annual capture capacity by 25%. However, over 650 projects are targeting start-up between 2026 and 2030 — far exceeding what is needed for NZE pathways. For NE Scotland, the Acorn CCS cluster at St Fergus remains the most directly relevant project, with ongoing UK Government funding support. The Iran crisis and elevated gas prices have reinforced the case for North Sea CCUS as a means of enabling continued industrial activity at lower carbon intensity, strengthening the political and commercial case for cluster development.

4. MARINE ENERGY AND SYSTEM FLEXIBILITY

EMEC RECEIVES £15 MILLION FOR BLUE HORIZON TIDAL EXPANSION: UKRI's £15 million award to the European Marine Energy Centre (EMEC) in Orkney advances the "Blue Horizon" project to expand tidal test facilities from single-device trials to multi-device array demonstrations. Orbital Marine Power's tidal device in Orkney was awarded a CfD contract in February 2026 AR7 results. New research published in late March identifies over 400 potential tidal energy sites globally with approximately 110 TWh/year of practical output potential across the top 90 sites. For NE Scotland companies,

EMEC's expanded facilities represent near-term opportunities for technology testing, marine operations, and integration engineering contracts in Orkney waters.

5. SUPPLY CHAIN CONTRACT INTELLIGENCE AND MARKET OPPORTUNITIES

5.1 Recent Contract Awards

CRP SUBSEA / NORDLICHT I — VATTENFALL (reported 29 March – 1 April 2026): CRP Subsea (an AIS company) secured a contract with Jan De Nul to supply 141 NjordGuard cable protection systems for Vattenfall's 980 MW Nordlicht I offshore wind project in the German North Sea. Three system designs (monopile and J-tube interfaces) will be engineered. Manufacturing takes place at CRP Subsea's facility in northwest England, with delivery scheduled for December 2026. The project becomes operational in 2028. This contract demonstrates the type of niche, high-value subsea component work that NE Scotland engineering companies can target in European wind markets.

5.2 Upcoming Tender and Contract Pipeline

- NETHERLANDS IJmuiden Ver Gamma-A & Gamma-B: 2 x 1 GW tender, applications open 2026, deadline December 2026. Foundations, cables, installation, O&M opportunities.
- FRANCE 10 GW OFFSHORE WIND TENDERS: 7 projects across French Atlantic and English Channel coasts. Initial selections end-2026/early 2027. European content criteria strongly favour UK/Scottish manufacturers.
- UK AR8 CfD ROUND (July 2026): Critical for ScotWind supply chain contracting. Berwick Bank (~4.1 GW) and Ossian (6 GW, DEME/Shell) expected to participate, subject to transmission charge resolution.
- LIONLINK: Subsea cable, HVDC converter, grid integration procurement advancing post-JDA, targeting early 2030s commissioning. DCO application 2026.
- ORANGEWIND (Netherlands, 795 MW): Offshore construction starting 2026. Foundations, cables, installation, and integration engineering opportunities.
- NORDLICHT I & II (Germany): 980 MW cluster — operational 2028. FID on Nordlicht II confirmed January 2026. O&M contract procurement approaching.

6. POLICY, REGULATION, AND FISCAL ENVIRONMENT

UK ALLOCATION ROUND 8 — JULY 2026: AR8 has been brought forward to July 2026, following AR7's record £22 billion, 8.4 GW result in January 2026. AR7 included the first-ever floating wind CfDs (Erebus 100 MW Celtic Sea; Pentland 100 MW Scotland). AR8 will need to address ScotWind transmission charges to realise the pipeline's potential. Scottish Renewables has called for the current regime to be fixed before AR8 opens.

FRANCE PPE3 ENERGY PLAN: France's third multiannual energy programme (PPE3), passed in early 2026, targets electricity production of 650–693 TWh by 2035 (up from 544 TWh in 2025), with fossil fuel consumption reduced to around 330 TWh. The plan creates an extended, predictable demand pipeline for the French offshore wind sector over the next decade.

NETHERLANDS TRANSITION TO CfD FROM 2027: The Dutch government's move from the temporary TOWOZ subsidy scheme to a Contracts for Difference model from 2027 aligns Dutch market design more closely with the UK's approach, improving comparability for supply chain companies operating across both markets and signalling a more investor-friendly, long-term policy framework.

7. NORTH EAST SCOTLAND STRATEGIC IMPLICATIONS

This week's developments carry significant strategic implications for North East Scotland energy supply chain companies. The following priority action areas are identified:

7.1 Immediate Priorities (Next 30 Days)

- TRANSMISSION CHARGE REFORM: Monitor and engage with Scottish Renewables, ETZ Ltd, and Scottish Government ahead of AR8 (July 2026). The commercial pipeline of 5+ ScotWind projects paused or at risk directly determines the local supply chain opportunity.
- AR8 PREPARATION: Begin pre-qualification and supply chain registration for Berwick Bank (SSE Renewables, ~4.1 GW) and Ossian (DEME/Shell, 6 GW). Engage developers directly — supply chain commitments are required for CfD bids.
- FRANCE TENDER INTELLIGENCE: Register with Business France and Scottish Development International for intelligence on the 10 GW French offshore wind tender. The resilience procurement criteria explicitly favour European (including Scottish) manufacturers.

7.2 Medium-Term Market Positioning (3–12 Months)

- NETHERLANDS/NORTH SEA GRID: LionLink JDA and IJmuiden Ver 2 GW tenders reinforce the Netherlands as a key export market for NE Scotland subsea cable, HVDC engineering, marine operations, and O&M capabilities.
- IRAN CRISIS — ENERGY SECURITY NARRATIVE: Reframe your company's capabilities around energy security as well as energy transition. Domestically produced, renewables-based energy is now a national security asset. This matters for how you pitch for contracts and present to investors.
- TIDAL ENERGY — ORKNEY HUB: With £15m invested in EMEC's Blue Horizon project and Orbital Marine Power securing a CfD, Orkney is consolidating as a commercial marine energy cluster. Assess whether your subsea, electrical, or marine logistics capabilities are relevant to this emerging value chain.
- HYDROGEN NETWORK — HUMBER & BEYOND: Monitor the OEUK North Sea CCS & Hydrogen Summit (1–2 June, Edinburgh) for contract and partnership intelligence relevant to the St Fergus-linked Acorn cluster and Project Union pipeline corridor.

7.3 Port of Aberdeen and Energy Transition Zone

Port of Aberdeen's £420 million South Harbour investment positions it as a national strategic asset for offshore wind assembly and integration, currently handling approximately 700 offshore wind vessels per year. The Energy Transition Zone (ETZ) in Aberdeen, backed by £54 million of UK and Scottish Government funding, targets 2,500 direct energy transition jobs with a further 10,000 across the region. Both assets are positioned to benefit directly from the ScotWind, INTOG, and Celtic Sea floating wind supply chains — but realising this potential depends critically on AR8 success and transmission charge reform.

8. WEEKLY FEATURE: THE IRAN CRISIS AS AN ENERGY TRANSITION CATALYST — IMPLICATIONS FOR NE SCOTLAND COMPANIES

Six weeks into what the IEA has called "the greatest global energy security challenge in history," a paradox is emerging: the same crisis causing acute economic pain through disrupted fossil fuel supplies is simultaneously delivering the most powerful geopolitical argument for accelerating the global energy transition since the 1970s oil shocks. For North East Scotland energy supply companies, understanding this paradox — and acting on it — is now a strategic imperative.

THE FOSSIL FUEL SYSTEM'S STRUCTURAL WEAKNESS EXPOSED: The closure of the Strait of Hormuz has demonstrated, in real time, the fundamental vulnerability of a global energy system dependent on a handful of geographic chokepoints. Qatar declared force majeure on all LNG exports following damage to Ras Laffan (17% capacity reduction; 3–5-year repair timeline). European gas storage entered the crisis at just 30% of capacity. Dutch TTF gas benchmarks nearly doubled to

€60/MWh by mid-March. The EU is now spending an additional €3 billion every 10 days on hydrocarbon imports. These are not temporary market fluctuations — they represent a structural failure that politicians across Europe are explicitly citing as justification for accelerating domestic clean energy deployment.

THE RENEWABLES DIVIDEND: IRENA's statistics show that global renewables capacity hit 5,149 GW in 2025, with wind adding a record 158.7 GW. The IRENA Director-General noted that "countries that invested in the energy transition are weathering this crisis with less economic damage." France, which generates 75% of its electricity from nuclear, explicitly cited this advantage in announcing the 12 GW tender on 2 April. This is the "resilience dividend" that renewable energy delivers, and it is now centre-stage in every major European energy policy decision.

FIVE KEY STRATEGIC INSIGHTS FOR NE SCOTLAND FIRMS:

- **THE PITCH HAS CHANGED:** Energy security is now co-equal with decarbonisation as a justification for offshore wind investment. Lead with energy security and supply chain resilience arguments when engaging developers, governments, or investors.
- **EUROPEAN CONTENT CRITERIA ARE NOW SOVEREIGNTY TOOLS:** France's "resilience" rules are the most explicit example yet of European supply chain preference coded into tender design. Scottish and UK manufacturers are well-positioned if they can demonstrate European origin and supply chain traceability.
- **CAPEX PRESSURES WILL INTENSIFY SHORT-TERM:** Higher diesel, marine fuel, and general inflation will increase project capex. Review cost structures and contract pricing, particularly fixed-price offshore contracts with multi-year execution timescales.
- **JAPAN, SOUTH KOREA, AND SOUTHEAST ASIA ARE FAST-TRACKING RENEWABLES:** These markets, highly dependent on Middle Eastern LNG, are accelerating offshore wind and clean energy deployment. NE Scotland firms have significant competitive advantages in these deep-water, harsh-environment markets.
- **THE NORTH SEA DECOMMISSIONING-TO-CCUS PIPELINE:** Higher oil and gas prices may extend some asset operational lives, but regulatory decommissioning obligations remain. The "decommissioning-to-CCUS" pathway becomes commercially more attractive when carbon credits and new offshore infrastructure costs are both rising.

9. EVENTS, CONFERENCES, AND NETWORKING CALENDAR

18 May 2026 (week) — Hydrogen Week UK 2026 (Nationwide (Liverpool anchor; Aberdeen events included)): UK-wide hydrogen initiative. HAR2 and FID news expected. Register via HydrogenUK.

28 May 2026 — Renewable Energy Supply Chain Conference 2026 (P&J Live, Aberdeen (Scottish Renewables)): Supply chain B2B, developer engagement. Premier event for NE Scotland companies. B2B meetings programme.

1–2 June 2026 — OEUK North Sea CCS & Hydrogen Summit 2026 (Edinburgh (Sheraton Grand)): CCUS and hydrogen from concept to deployment. FIDs across UK, Norway, Germany, Netherlands.

4 June 2026 — Wood Mackenzie Hydrogen Conference 2026 (London): UK hydrogen strategy, investor signals, policy direction.

16–17 June 2026 — Global Offshore Wind 2026 (Manchester Central (RenewableUK/GWEC)): Premier offshore wind conference. Theme: "Securing the Future." 5,000+ delegates. Key developer engagement.

17–19 Nov 2026 — OEEG Offshore Energy & Equipment Global Conference 2026 (Shanghai World Expo Center): Asia-Pacific supply chain, floating wind, offshore technology. Key for Asian market export intelligence.

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