

Empowering Europe: Delivering the security and economic benefits of clean energy in the North Seas

Executive summary¹

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Offshore wind in the North Seas has the potential to be a major geostrategic and economic asset for Europe. In the face of new security challenges, the North Seas grid can be planned as a security asset, and to be resilient in the face of attack. Stable project pipelines can support the development of strong supply chains, ready to capitalise on global market growth. A North Seas grid can provide households and industry with reliable energy supply at stable prices, benefitting the whole economy.

Leaders need to show that Europe will grasp this opportunity. This requires leaders of North Seas adjacent countries to inject a step change in the pace of deployment, and in the depth and the scope of cooperation between countries.

An ambitious offshore wind agenda can be a defence asset in the North Seas

Leaders already recognise that North Seas wind is a valuable opportunity to reduce exposure to the price shocks and supply squeezes that come with fossil fuel dependency. The North Seas Energy Cooperation (NSEC) was established to grasp the opportunity, and

¹ Download the full report from: <https://www.e3g.org/publications/empowering-europe-security-economic-benefits-north-seas-wind/>

leaders have set a target to deploy at least 300 GW of offshore wind in the North Seas by 2050.²

Building out renewable energy in the North Seas can do even more for Europe's security. The infrastructure itself can be designed as a security asset to improve defence capabilities in the North Seas through the inclusion of surveillance and monitoring equipment. Furthermore, in case of sabotage or attack, decentralised systems can make it easier to restore energy supply, compared to oil and gas infrastructure. These are important considerations since the North Seas is already identified as a potential future security flashpoint.³

The existing close energy security cooperation between North Seas adjacent countries does not yet link the energy and security dimensions. Countries need to work together to ensure that security requirements – and opportunities – are integrated into the design of the system. These discussions should also consider the growing risk from new threats such as hybrid and cyberattacks, as well as increasing extreme weather events. Better integration of energy and security governance at national level is a prerequisite to enable countries to align national priorities with the regionally coordinated security requirements.

In 2025, NATO agreed that parties may allocate up to 1.5% of GDP to broader security-related spending.⁴ Given the potential for the North Seas offshore grid to be a defence asset, leaders should agree to use a proportion of this funding to finance security aspects of the design.

North Seas wind can help Europe be a global shaper and leader on offshore wind

Europe has technological leadership in offshore wind, and manufacturers Siemens Energy and Vestas held nearly 40% of the global market for complete offshore wind turbines in 2024.⁵ Europe is in a strong position to be a leader in this growing market in the face of global competition, boosting local economies and the competitiveness of European manufacturers and supply chains.

Scaling domestic markets is essential for the European wind industry to maintain its global status. Again, cooperation between countries is vital. Integrating regional demand to create a larger market will encourage supply chain investment, while harmonising tendering requirements and standardising components can improve efficiency in the supply chain.

² European Commission, [The North Seas Energy Cooperation](#) (webpage, accessed January 2026)

³ Atlas Institute for International Affairs, January 2025, [A North Sea defence alliance: challenges and opportunities for the UK](#)

⁴ NATO, June 2025, [The Hague Summit Declaration](#)

⁵ European Commission Joint Research Centre, 2025, [Clean Energy Technology Observatory: Wind Energy in the European Union - 2025 Status Report on Technology Development, Trends, Value Chains and Markets](#)

Creating efficiencies of scale can result in lower costs and benefits for electricity consumers. By providing large volumes of renewable energy at competitive prices, the key economic benefits of North Seas wind would ultimately lie across the economy, creating the confidence for European industries to invest and grow.

An action plan for the North Sea Summit in 2026 and beyond

While North Seas leaders agreed to bold deployment targets for offshore wind, delivery is off track.⁶ There is also insufficient cooperation, as deployment remains largely driven by independent national agendas. Significantly, the UK – which may represent around one-third of North Seas wind capacity by 2030 – currently only has observer status in the NSEC.

Capturing the benefits of North Seas wind requires a new approach. The North Seas must be viewed as a European project with energy, economic and security dividends arising through close cooperation. Given the political nature of the decisions to be made, technical coordination is not enough.

The heads of government summit planned for 26th January 2026 is a crucial moment to start making that change. Starting this year, and carrying the momentum into future summits, the North Sea Summit must set up the structures to embed a security by design approach for the North Seas grid, strengthen Europe's economic resilience, and deliver at pace. We propose that the following actions are agreed by leaders at the summit.

Embed a security by design approach

- ▶ Agree to dedicate part of the NATO-agreed 1.5% of GDP for security-related spending to cover the potential additional cost of aligning grid development with a security by design approach.
- ▶ Establish a platform for sharing security information among key North Seas energy and security stakeholders.
- ▶ Define the governance arrangements to monitor the realisation of security benefits from speedy delivery and set network design and system security criteria.

Strengthen economic resilience

- ▶ Commit to harmonise tender requirements, including timelines, and explore standardisation of components and equipment.

⁶ Baringa, on behalf of Breakthrough Energy, December 2024, [Beyond Borders: Unlocking the power of UK-EU offshore wind coordination](#)

- ▶ Identify critical components that require European production for security and resilience alongside those that will deliver an industrial dividend.
- ▶ Agree coordinated action to build and scale regional supply chain capacities in critical sectors.
- ▶ Define an international partnership agenda to shape and build global influence and export opportunities.

Accelerate delivery

- ▶ Accelerate current projects by resolving the cross-border cost-sharing and electricity trading framework, including by clarifying the basis for future UK-EU trading.
- ▶ Define the governance for North Seas wind spatial planning, network design and system operation, including through establishing when the UK will become a full member of the North Seas Energy Cooperation.
- ▶ Set the timeline to produce an integrated spatial energy plan for the North Seas and to design the grid that will meet these energy needs.

Above all, leaders must take control of the agenda to ensure it proceeds at pace given the geostrategic value.

- ▶ Establish a leader-level sherpa group to drive decision making at pace, monitor progress, and quickly escalate issues for resolution.

A delivery schedule for security and prosperity through North Seas wind


Security by design

Economic resilience

Accelerated delivery
2026 NORTH SEA SUMMIT ▶
2027 NORTH SEA SUMMIT ▶
2028 NORTH SEA SUMMIT

- ▶ Establish leader-level sherpa group



- ▶ Agree to dedicate part of NATO-agreed security-related spending
- ▶ Establish the energy security governance structure for sharing security information and coordinating on security requirements

- ▶ Agree on the security requirements needed to address new security threats



- ▶ Define the basis for future trading

- ▶ Harmonise tender requirements and explore component/equipment standardisation
- ▶ Identify critical components for European production
- ▶ Define agenda to build collaboration with developing offshore wind markets

- ▶ Agree tender volumes and timelines in line with North Seas spatial energy plan
- ▶ Agree coordinated action to build and scale supply chains in critical sectors



- ▶ Commit to coordinated build-out to meet 300 GW 2050 target
- ▶ Confirm UK membership of NSEC

- ▶ Agree interoperability standards
- ▶ Endorse North Seas spatial energy plan
- ▶ Confirm cost-sharing, CfD and harmonised offtake arrangements

- ▶ Endorse North Seas grid plan
- ▶ Confirm enduring North Seas energy governance arrangements

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