UK & Europe

LATE LIFE & DECOMMISSIONING REPORT

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Executive Summary

This is the first edition of the Decom Mission (DM) – Energy Industries Council (EIC) decommissioning report. We will be publishing these on a quarterly basis and they will summarise overall trends in decommissioning in the energy sector on a region-by-region basis. Each report will in turn be supported by a webinar, open to members of both organisations.

Within the energy sector there are both legal, technical and moral obligations to safely cease operations, de-energise systems, deconstruct plant, manage waste streams and return land and space to alternative or original use. Collectively these activities are known as decommissioning.

This report is, rightly, dominated by decommissioning of oil and gas assets. Skills and services being deployed within this market are now of considerable export value, as supported and advocated by Decom Mission and the EIC alike on a global basis. In many instances these assets were a first of their kind, built to only last a short number of decades and using technologies and techniques that were at the cutting edge of capability at the time. Fields with these type of assets exist both onshore and offshore, ranging from the Northern Norwegian sector through to the Mediterranean.

A broad transition from coal and steam power to hydrocarbons occurred in the first six decades of the 20th Century. Discovery and exploitation of hydrocarbons both expanded in scale and in nature, around the globe and within Europe. With the energy transition now dominating, since 2015 we have seen the transition from coal to gas ramp up significantly and a large number of legacy coal power plants have already been taken offline across Europe and decommissioned by a variety of specialist contractors. The UK has been a standout market for this and is largely ahead of others in the region.

With over 130 nuclear reactors in the whole of Europe, the estimated value of nuclear decommissioning activity, according to current data, is $120 billion, $89 billion of which has already been awarded. Given the long-term nature of nuclear decommissioning activity, total market value can be expected to be somewhat larger than currently recorded.

Germany's decision to cease the use of civilian nuclear power places the country as the second most active market in Europe with 17 sites undergoing decommissioning. EIC data estimates total market size as $10 billion. France is in third place, with a current estimate of $3.5 billion. Both estimates only reflect scopes already illustrated in public and do not represent overall market size. Further to this, all of the above estimates notably exclude the decommissioning of military facilities across Europe as a whole.

Although Europe has been world class leading in the development of renewable assets, in particular onshore and offshore wind, the reality is that the earliest farms have now passed through repowering (the act of life extension) and are now entering the decommissioning phase.

Longer term there is undoubtedly going to be work in biogas, solar and geothermal, however these technologies are at too early a stage to identify where these opportunities will lie.

Both the EIC and DM encourage our members to consider the international and diversification opportunities presented within the European decommissioning market. Specialist knowledge and capability will be widely required.

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