

OPPORTUNITY FRANCE

The AO10 Mega-Tender

A Strategic Opportunity Report for North East Scotland Tier 2 & Tier 3 Offshore Energy Supply Chain Companies

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Executive Summary

On 11 June 2026, France published a formal call for tenders in the Official Journal of the EU, launching the single largest offshore wind procurement event in European history. The combined AO9/AO10 "mega-tender" — designated **AO10** by the Commission de régulation de l'énergie (CRE) — seeks to award development rights for **11 projects totalling just over 10 GW**, split equally between **5 GW of fixed-bottom and 5 GW of floating wind** ([Ministère de l'Économie press release, 12 June 2026](#); [Windtech International, 15 June 2026](#)). The French Ministry of Energy described it as "truly marking a change of scale" for the country's ambitions ([Ocean Energy Resources, 12 June 2026](#)).

For North East Scotland's (NES) offshore energy supply chain, this is a defining export opportunity, for three reasons:

1. **Scale and timing.** 10 GW is roughly five times France's current operational offshore capacity of under 2 GW ([Inspenet, 15 June 2026](#)). Critically, **5 GW is floating wind — the largest single floating commitment ever made by any government** — and floating is precisely the segment where the NES supply chain holds its strongest, most differentiated capability, built on decades of North Sea subsea, mooring, marine-operations and fabrication expertise.
2. **A genuine procurement window now opens.** Developers must submit bids to CRE by **12 October 2026**, with information requests open until **19 July 2026**, CRE assessment in early 2027, and ministerial award in **February 2027** ([Energynews.pro, 15 June 2026](#); [Windtech International](#)). The Tier-1 developers and EPCI contractors who win in February 2027 will immediately begin building their supply chains. **Tier 2/Tier 3 positioning and relationship-building must happen during the 2026 bid phase — not after award.**
3. **A "Made in Europe" gate that works in NES's favour — but needs careful navigation.** For the first time, the AO10 specification embeds **eligibility and scoring criteria on "supply resilience"** drawn from the EU's **Net Zero Industry Act (NZIA)**, requiring at least **75% of turbine components and 75% of crew transfer vessels to be sourced and built in Europe** ([Windtech International](#); [Energynews.pro](#)). As a UK supply chain, NES sits **outside the EU but inside Europe geographically** — a nuance that is decisive and is analysed in detail in Section 6.

Bottom line: AO10 is a "must-engage" opportunity for NES floating-wind balance-of-plant capabilities, a credible but more contested opportunity in fixed-bottom, and a relationship-building exercise that NES firms should run in parallel with — not instead of — the UK pipeline. The window for action is the **next 16 weeks**.

Section 1: The AO10 Tender — What Was Published

1.1 Headline parameters

Parameter	Detail	Source
Tender designation	AO10 (absorbing the previously separate AO9 round)	Ministère de l'Économie
Call for tenders published	11 June 2026 (Official Journal of the EU)	Ocean Energy Resources
CRE specifications published	12 June 2026	Ministère de l'Économie
Total capacity	~10.15 GW across 11 projects	Windtech International

Parameter	Detail	Source
Technology split	5 GW fixed-bottom (4 projects) + 5 GW floating (7 projects)	Ministère de l'Économie
Information request deadline	19 July 2026	Energynews.pro
Bid submission deadline	12 October 2026	Ocean Energy Resources
CRE assessment / opinion	Early 2027	Energynews.pro
Ministerial award	February 2027	Energynews.pro
Price ceiling (weighted average)	Below €100/MWh, 25-year Contract for Difference	Inspenet
Grid connection	Expected ~2030–2035 (target 18 GW operational by 2035)	Enerdata
Official tender portal	eoliennesenmer.fr/etudes-AO10	Ministère de l'Économie

1.2 The 11 projects

The official annex to the French Government press release lists the projects as follows ([Ministère de l'Économie, 12 June 2026](#); cross-confirmed by [Windtech International](#)):

#	Project	Maritime façade	Capacity	Type
1–3	Fécamp-Grand-Large	Normandy (Eastern Channel)	3 × 1.35 GW (4.05 GW)	Fixed-bottom
4	Oléron 1	South Atlantic	1.2 GW	Fixed-bottom
5	Bretagne-Nord-Ouest (BNO)	Brittany	1.2 GW	Floating
6	Bretagne-Sud 2	Brittany	0.5 GW	Floating
7	Narbonnaise Sud Hérault 2	Mediterranean (Occitanie)	0.5 GW	Floating
8–10	Golfe du Lion Centre	Mediterranean	1.1 GW + 2 × 0.55 GW (2.2 GW)	Floating
11	Golfe de Fos 2	Mediterranean (PACA)	0.5 GW	Floating

Reading the geography:

- **Fixed-bottom (5.25 GW)** is concentrated in **Normandy (Fécamp)** and the **South Atlantic (Oléron)** — the Eastern Channel sites are closest to UK waters and existing North Sea logistics routes.
- **Floating (4.9 GW)** is split between **Brittany** (Celtic Sea-adjacent, 1.7 GW) and the **Mediterranean** (Occitanie/PACA, 3.2 GW). The Brittany floating cluster is the most strategically accessible for NES because of the established Scotland–Brittany floating-wind corridor (Section 5).

1.3 Evaluation framework

Bids will be scored against four criteria ([Windtech International](#)):

1. **Price** — weighted average below €100/MWh.

2. **Industrial resilience / supply chain** — drawn from the EU Net Zero Industry Act; ≥75% European content for turbine components and crew transfer vessels; penalties where more than four of nine strategic turbine components are made in China, and Chinese permanent magnets capped at 50% ([LA Times](#), 10 April 2026; [Inспенet](#)).
3. **Environmental performance** — including consideration of fishing and existing maritime activities.
4. **Cybersecurity** — a formal scored criterion for the first time.

The French Government's stated intent is to "maximise the industrial benefits of offshore wind development across European territory," sustaining existing industrial sites and triggering new high-value investment ([Energynews.pro](#)). This explicitly elevates supply-chain credibility above pure price — a structural advantage for capable, certified European suppliers and a clear signal that **who developers build with matters as much as what they bid**.

Section 2: Why This Matters Specifically for North East Scotland

2.1 The floating-wind alignment is exceptional

AO10 reserves **5 GW for floating wind — the largest single floating procurement ever undertaken globally** ([Floating Offshore Wind Conference](#)). Floating offshore wind is the single market segment where the NES supply chain holds its strongest competitive position, drawing on the region's deep North Sea heritage in subsea engineering, mooring and anchoring systems, marine operations, fabrication, and inspection — the precise capability set floating projects require.

Scotland already holds nearly **10% of the global floating wind pipeline** and has fielded the world's first (Hywind Scotland) and largest operating (Hywind Tampen) floating arrays — a track record that confers exactly the "ability to deliver" credibility that AO10's NZIA-derived resilience scoring rewards ([WindEurope](#)).

2.2 Floating wind is assembled in port — and needs the NES skill set

Unlike fixed-bottom, floating turbines are **assembled quayside on their buoyant foundations** then towed out, because the floating foundation cannot be worked on at sea ([Windtech International](#), [Mammoet at Port-la-Nouvelle](#)). Each French floating port mobilisation explicitly demands "companies in the maritime, logistics, lifting, electronics and welding sectors" ([Euroports / Port-la-Nouvelle](#)) — the precise capability profile of the NES offshore supply chain.

The French floating supply chain remains immature, with confirmed gaps in **fabrication capacity and specialist port facilities** — the two obstacles named in the France–Norway supply-chain MoU ([Floating Offshore Wind Conference](#)). This capability gap is the NES opportunity.

2.3 The standard French floating supply chain reveals open slots

Existing French floating projects (EFGL, EOLMED, Pennavel) and the pilot supply chains map to specific scopes where NES firms are competitive ([Guide to Floating Offshore Wind supply chain](#)):

Floating work package	Typical incumbents	NES supply-chain capability
Mooring lines & quick-connect systems	Vicinay, Bridon-Bekaert, InterMoor	Quick-connect mooring systems & mooring engineering — a recognised NES strength
Anchors	Delmar Vryhof, Aker Solutions, Isleburn	Heavy fabrication & precision machining

Floating work package	Typical incumbents	NES supply-chain capability
Marshalling, cable handling, lifting	Mammoet, Bourbon, Euroports	Cable-handling spreads, AHC winches, transpooling
Subsea connectors / dynamic cable hardware	TechnipFMC, Seaway 7	Subsea connectors, flanges, manifolds; subsea electronics
Non-welded piping on floating substructures & substations	(open)	Non-welded piping systems (cut hot-work / install time 30–40%)
NDT, weld inspection, integrity	Bureau Veritas, local	Inspection, NDT and integrity-management services

Section 3: The Developer & Buyer Landscape — Who to Target

NES Tier 2/3 firms sell to Tier-1 developers and their EPCI contractors, not to the French Government. The pool of credible AO10 bidders is largely visible from the AO9 pre-qualification list (November 2024), which is the strongest available guide to who will bid for the merged round ([Tamarindo, 19 Nov 2024](#); [Windpower Monthly](#)).

3.1 Pre-qualified / likely AO10 developers

Developer / consortium	Notes & NES relevance
TotalEnergies	Held the last fixed-bottom award at €66/MWh; major bidder
Iberdrola	Active across UK & French offshore; existing ScotWind relationships
RWE	Floating partner with Bourbon for French Med; UK pipeline overlap
Ocean Winds (EDP Renewables + ENGIE JV)	Developer of EFGL (France's first major floating farm) and a Celtic Sea Round 5 preferred bidder — already engaged with NES on UK projects (Caledonia, Celtic Sea). Highest-priority dual-market target.
EDF Renewables + Maple Power	Domestic incumbent
EnBW Valeco Offshore	German utility, French arm
BayWa r.e.	
Parkwind	Belgian developer
Skyborn Renewables + Octopus Energy	UK link via Octopus
Elicio + Q Energy + Kansai Electric	
Oxan Energy + Ingka Investments (IKEA)	
Plenitude (Eni) + Qair	Confirmed consortium for AO9 floating/fixed projects (Bid Detail)

3.2 Priority targeting logic

- **Tier A — dual-market developers:** Ocean Winds, Iberdrola, RWE, Skyborn/Octopus. These already know (or can quickly verify) NES capability through UK projects. Engagement cost is lowest and credibility transfer is highest.

- **Tier B — EPCI / fabrication primes:** the contractors who actually let mooring, cable-handling, and substation sub-packages — e.g. **Saipem, TechnipFMC, Seaway 7, Bourbon, Boskalis, Eiffage Métal / Archimed** (float fabricator), **Euroports / Mammoet** (port marshalling). For Tier 2/3 firms, **these EPCI primes are often the more realistic direct customers** than developers.
- **Tier C — French/Breton supply-chain clusters** as the introduction route (Section 5).

Section 4: The Tier 2 / Tier 3 Opportunity Map by Work Package

The table below maps AO10 work scopes to NES supply-chain capability areas, indicating the realistic tier of engagement and the strength of fit. Fit ratings: ●●●● Lead · ●●● Strong · ●● Partial · ● Emerging.

AO10 work package	Project types	NES capability area	Tier	Fit
Floating mooring & quick-connect systems	All 7 floating	Quick-connect mooring & mooring engineering	T2 to EPCI	●●●●
Anchor fabrication & heavy machining	All 7 floating	Heavy fabrication & precision machining	T2/T3	●●●
Array/dynamic cable handling, transpooling, AHC winches	Floating + fixed	Marine spreads & cable-handling equipment	T2 to EPCI	●●●●
Subsea connectors, flanges, manifolds, ROV tooling	All	Subsea hardware & tooling	T2/T3	●●●
Subsea electronics & autonomous power	Floating	Subsea electronics & power systems	T2/T3	●●●
Non-welded piping (substations, floating substructures)	Fixed substations + floating	Non-welded piping systems	T2	●●●
Valves, emissions, gas-turbine & NDT services	Substations / O&M	Valves, emissions & flow-control services	T2/T3	●●
Weld inspection, integrity, certification	All	Inspection, NDT & integrity management	T2/T3	●●●
Quayside marshalling support & component storage	Port mobilisation	Port-side services & storage capability	T2/T3	●●

4.1 Where NES firms should focus

1. **Floating mooring & anchoring.** This is the single strongest play. Mooring is a confirmed bottleneck, requires 3–5-year lead times, and France has seven floating projects with no entrenched domestic quick-connect mooring supplier. NES holds genuine, certified differentiation in quick-connect mooring — and **Bureau Veritas, which certifies such systems, is itself active in the Breton floating cluster**, providing a natural certification bridge.

2. **Cable handling & marine spreads.** Every floating and fixed project needs dynamic/array cable handling. NES marine-spread capability competes directly with the equipment Mammoet/Euroports deploy at Port-la-Nouvelle.
3. **Subsea connectors & electronics.** Lower-volume but high-value, low-French-competition niches that fit the NZIA "European specialist" framing well.
4. **Non-welded piping.** The 30–40% install-time-saving argument is compelling for both fixed substations and floating substructure work, where quayside welding hours are the binding constraint (250,000 work hours, 150,000 in welding, were needed for just three EOLMED floats — [Qair / EOLMED](#)).

Section 5: The Route to Market — Existing Scotland–France Bridges

NES does not have to enter France cold. Several structural bridges already exist:

5.1 The Brittany corridor (highest-value relationship)

Bretagne Ocean Power (BOP) — Brittany's offshore renewables cluster, representing 200+ Breton companies — **actively exhibited in Aberdeen at Floating Offshore Wind 2025 (November 2025) specifically to "strengthen bridges with the Scottish supply chain"** ([Bretagne Ocean Power, 20 Nov 2025](#)). Brittany has **2 GW in the AO10 tender** (BNO 1.2 GW + Bretagne-Sud 2 at 0.5 GW), plus Pennavel (France's first commercial floating farm). This is the warmest, most actionable relationship available to NES firms and should be the first port of call.

5.2 The FLOW Ports Alliance (UK is already a member)

In November 2025, **BrestPort, Shannon Foynes Port (Ireland) and Associated British Ports (ABP — 21 UK ports)** signed the first **Floating Offshore Wind Ports Alliance** ([Bretagne Ocean Power](#)). A UK port operator is therefore already inside the cross-border floating-port collaboration that AO10 Brittany projects will draw on — a route worth exploring for marshalling and component-flow opportunities.

5.3 France–Norway supply-chain MoU

France Offshore Renewables and Norwegian Offshore Wind have signed an MoU to coordinate supply chains and port infrastructure, explicitly targeting fabrication-capacity and port-access gaps ([Floating Offshore Wind Conference](#)). This confirms France is openly courting non-domestic European supply chains to fill capability gaps — and signals the political acceptability of bringing in proven floating-wind suppliers from neighbouring markets.

5.4 Scottish institutional support

- **Scottish Development International (SDI)** is already tracking the AO9/AO10 round and France's floating leadership ([Scottish Development International, LinkedIn](#)).
- **SOWEC's "Offshore Wind International Export Markets" guide** (Scotia Supply Chain) scores France among the high-potential European markets and provides SME market-entry frameworks ([SOWEC Export Guide](#)).
- **ETZ's own Digital & AI Acceleration Programme** is purpose-built to support NES SMEs into exactly this kind of international low-carbon market — and a coordinated export / market-entry route remains one of the biggest unfilled gaps in the NES landscape, which AO10 is an ideal anchor to address.

5.5 French floating ports — the physical entry points

Port	Region / façade	Relevance
BrestPort (MRE terminal)	Brittany	40 ha, 400 m heavy quay; near Celtic Sea; InFloW investment programme; FLOW Ports Alliance member — primary Brittany hub
Lorient	Brittany	Mooring-system deployment and crew/services port
Port-la-Nouvelle	Mediterranean (Occitanie)	Dedicated floating assembly quay; serves Narbonnaise & Golfe du Lion; €234m regional investment
Fos-sur-Mer / GPMM Marseille	Mediterranean (PACA)	Eiffage Métal/Archimed float fabrication; serves Golfe de Fos
Le Havre / Cherbourg	Normandy	Fixed-bottom mobilisation for Fécamp-Grand-Large

Sources: [Bretagne Ocean Power](#); [Port-la-Nouvelle](#); [BDI ports brochure](#).

Section 6: Barriers, Risks & Mitigation

6.1 The "75% European content" / NZIA question — the critical issue

This is the most important strategic question in the entire opportunity, and it must be understood precisely.

What the rule actually says. The 75% European-content requirement, as reported, applies specifically to **turbine components** and **crew transfer vessels** ([Windtech International](#)). The broader "supply resilience" criterion is drawn from the EU **Net Zero Industry Act**, whose principal purpose is to reduce dependency on **Chinese** components — the explicit penalties target Chinese strategic components and permanent magnets, not non-EU European suppliers ([LA Times](#); [Inспенet](#)).

Where NES sits. The UK is outside the EU but is unambiguously part of **"Europe"** / **"European territory"** in geographic and industrial terms, and the policy intent is anti-China, not anti-UK. The France–Norway MoU (Norway also being non-EU) confirms France is actively integrating non-EU European supply chains. **The likely position is that UK-sourced content counts favourably toward the "European" framing for most balance-of-plant scopes (mooring, cable handling, subsea hardware, piping), which are not the turbine-component or CTV categories carrying the hardest 75% threshold.**

The required action. This must be confirmed, not assumed. The exact legal definition of "European" content in the CRE *cahier des charges* is the single most important due-diligence item. **Submitting an information request to CRE before the 19 July 2026 deadline** to clarify the treatment of UK-origin balance-of-plant content is the recommended first formal step (Section 7).

Mitigation regardless of the answer:

- Position NES scopes as **balance-of-plant / specialist services** (mooring, cabling, subsea, piping, inspection) rather than core turbine components.

- Consider **French/Breton local-partner JVs** so that value is recognised as delivered "in Europe" with French industrial footprint — mirroring the proven **Semco Maritime + PTSC M&C** complementary-JV model.
- Explore **French establishment or local assembly/marshalling** for high-content scopes if volumes justify it.

6.2 Other barriers and mitigations

Barrier	Impact	Mitigation
Language & contracting in French	Medium	Partner with Breton cluster (BOP) / use SDI in-market support; French-language capability statements
Currency & post-Brexit customs friction	Medium	Price in EUR; consider local stockholding; use FLOW Ports Alliance logistics links
Logistics distance (Mediterranean sites)	Medium–High	Prioritise Brittany / Normandy sites (closest to North Sea routes) over Med sites
Entrenched domestic incumbents (Vicinay, Eiffage, Bourbon)	High in commodity scopes	Compete on differentiated technology (quick-connect mooring, non-welded piping, subsea power) not commodity steel
Capacity conflict with UK pipeline (AR7, ScotWind, Green Volt)	Medium	Treat AO10 as incremental / parallel , prioritising scopes with 2028+ delivery that don't clash with near-term UK mooring windows
Tender timing is tight (16 weeks to bid)	High	Engagement is with developers/EPCI now ; NES firms do not bid the CRE tender itself — focus on being on bidders' supply-chain plans
Scale & resourcing for individual SMEs	Medium–High	Where a single firm cannot carry a full work package, form capability-complementary consortia or partner with an EPCI prime (see Section 7)

6.3 A reality check on tier and timing

NES firms are **not** bidders to CRE — they are Tier 2/3 suppliers seeking to be embedded in the supply-chain plans of Tier-1 developers and their EPCI contractors **before** those bids are submitted on 12 October 2026, and to convert those relationships into contracts after the February 2027 award. The credible 2026 goal is therefore **relationship capture and supply-chain-plan inclusion**, not signed contracts.

Section 7: Recommended Action Plan & Priority Matrix

7.1 Immediate actions (next 16 weeks — by 12 October 2026 bid deadline)

Priority	Action	Owner	Deadline
1	Submit a formal information request to CRE clarifying treatment of UK-origin balance-of-plant content under the NZIA "European" definition	ETZ / lead NES firms	By 19 July 2026
2	Re-engage Bretagne Ocean Power (from the Aberdeen FOW 2025 relationship) to seek BNO / Bretagne-Sud 2 supply-chain introductions	ETZ / NES cluster	July 2026
3	Prioritised outreach to Tier-A dual-market developers — Ocean Winds first, then Iberdrola, RWE, Skyborn/Octopus	NES BD teams	July–Sept 2026
4	Build French-market capability packs (EN + FR) leading with mooring, marine spreads, subsea hardware and non-welded piping strengths	Individual firms / ETZ support	Aug 2026
5	Engage SDI France desk and ETZ export support; map to the SOWEC export framework	ETZ	July 2026
6	Identify candidate French/Breton JV partners to pre-empt the "European content" question (Semco/PTSC-style complementary JV)	NES firms / ETZ	Aug–Sept 2026

7.2 Medium-term actions (Oct 2026 – Feb 2027 award)

- Track AO10 bid submissions and identify which consortia/EPCI primes have NES-relevant scopes still open.
- Position NES firms for inclusion in winning bidders' supply-chain plans ahead of the February 2027 award.
- Explore the **FLOW Ports Alliance** (via ABP) for marshalling/component-flow roles on Brittany floating projects.

7.3 The case for consortium and collaborative bidding

AO10 work packages are large, and Tier-1 developers and EPCI primes increasingly prefer to award **bundled, de-risked scopes** to suppliers who can deliver a complete capability rather than a single component. For many individual NES SMEs, this is the principal commercial barrier to AO10 — and the principal argument for collaboration. NES firms should consider:

- **Capability-complementary consortia** — combining, for example, mooring, fabrication, cable-handling and inspection capability into a single addressable package that matches an EPCI prime's

sub-contract scope. This raises credibility under AO10's industrial-resilience scoring and reduces the developer's counterparty count.

- **A coordinated NES export / market-entry vehicle** — a standing collaborative structure (cluster-led or ETZ-facilitated) that presents the region's offshore supply chain to French buyers under a single front door, shares market-entry cost, and pools French-language and in-market resource. This remains one of the most significant unfilled gaps in the NES landscape, and AO10 is an ideal anchor to justify forming it.
- **Local-partner joint ventures** — pairing NES capability with a French/Breton partner to satisfy the "European content" framing while retaining UK-based engineering value (Section 6.1).

Collaboration should be treated as an **enabler of the wider NES opportunity**, not a precondition: firms with the scale to engage developers and EPCI primes directly should do so in parallel.

7.4 Opportunity priority matrix

Opportunity	Attractiveness	Accessibility	Verdict
Brittany floating — quick-connect mooring	High	High (BOP bridge)	Must engage — #1 priority
Brittany/Normandy — cable handling & marine spreads	High	Medium–High	Engage
Subsea connectors & electronics	Medium–High	Medium	Engage selectively
Non-welded piping	Medium	Medium	Engage (substation scopes)
Fécamp fixed-bottom (Normandy)	Medium (commodity)	Medium	Selective — quayside/cable scopes
Mediterranean floating (Occitanie/PACA)	High capacity	Lower (distance)	Monitor; pursue via JV only
Valves/emissions/NDT services	Medium	Medium	O&M-phase opportunity (post-2030)

Section 8: Conclusion

France's AO10 mega-tender is the most significant single offshore wind procurement event Europe has ever seen, and its 5 GW floating allocation aligns almost perfectly with the strongest, most differentiated capabilities of the North East Scotland offshore supply chain — quick-connect mooring, cable handling, subsea hardware, fabrication, and non-welded piping. The combination of a confirmed procurement timeline, an immature French floating supply chain actively seeking external European partners, and warm pre-existing Scotland–Brittany bridges makes this a genuine, time-bound opportunity rather than a speculative one.

The decisive variables are **(a)** confirming the treatment of UK content under the NZIA "European" definition — best resolved by a formal CRE information request before 19 July 2026 — and **(b)** moving now, during the 2026 bid phase, to embed NES firms in developers' and EPCI contractors' supply-chain plans ahead of the February 2027 award. The floating mooring opportunity into the Brittany projects, routed through Bretagne Ocean Power and Tier-A dual-market developers led by Ocean Winds, is the single highest-value, most accessible entry point and should be actioned first.

Finally, while individual NES firms can and should engage directly, the scale of AO10 work packages makes **collaborative and consortium arrangements** — capability-complementary groupings, a coordinated NES export vehicle, and local-partner JVs — a powerful enabler for converting this opportunity into contracts. This opportunity should be pursued **in parallel with**, not instead of, the UK pipeline.

Sources

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