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The Politics of Procurement: Green Industrial Policy Through Non-Price Criteria in European Offshore Wind Auctions

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Abstract

Auctions have recently become the main tool for the deployment of offshore wind energy. Simultaneously, amidst a resurgence of industrial policy in Europe, public procurement is leveraged to strengthen the security of supply of net-zero technologies and their components. A central instrument in this shift is the growing use of non-price criteria—factors beyond bid prices—in allocating renewable energy development rights through auctions. This article assesses how public procurement is used as an industrial policy tool by leveraging non-price criteria in renewable energy auctions. Specifically, the article asks: Which European countries incorporate non-price criteria into offshore wind energy auctions, and which kinds of criteria do they use? The European offshore wind sector is used as a typical case, as by 2030 an estimated 97 percent of its capacity will have been allocated through auctions. Building on WindEurope's auction database, a document analysis of legislation and tender documents is executed. We find four categories of non-price criteria, relating to resilience, sustainability, justice, and capabilities. By leveraging this four-dimensional framework, we show that European states predominantly employ resilience measures when integrating non-price criteria in offshore wind auctions. At the same time, the results reveal intertemporal and cross-country variation in the use of non-price criteria. As a plausibility probe, we link this variation to path dependency, changing market circumstances, government composition, and political economy institutions. The article's central contribution lies in demonstrating how public procurement is leveraged for green industrial policy goals through non-price criteria.

Keywords

European Union; industrial policy; net-zero technologies; non-price criteria; offshore wind energy; public procurement; renewable energy auctions

1. Introduction

"European industry can count on the provisions of [the Industrial Accelerator Act] to boost demand and guarantee resilient supply chains in strategic sectors," stated Stéphane Séjourné, European Commissioner for Industrial Strategy, while presenting the proposal for the Industrial Accelerator Act (European Commission, 2026). The Act seeks to boost demand for "low-carbon, European-made technologies" by introducing "Made in EU" requirements for public procurement (European Commission, 2026). Net-zero industries have become an arena of geoeconomic competition, as states compete to reap the benefits of decarbonization (Meckling, 2025), wary of dependencies on foreign technologies (Babić et al., 2024; Seidl & Schmitz, 2024). Strengthening the security of supply of these technologies and their upstream components is at the heart of the EU's industrial policies, such as the Net-Zero Industry Act and the Clean Industrial Deal.

The EU wields a plethora of instruments to support the domestic production of net-zero technologies (De La Cruz et al., 2026). Member states subsidize this ecosystem through state aid (Di Carlo et al., 2024), as EU-level policies direct these efforts to the green transition (Bulfone, Di Carlo, & Seidl, 2026; Bulfone, Miró, & Moschella, 2026). On the defensive side, unfair competition is combatted through supranational trade restrictions, with such restrictions more limited in the area of public procurement. Nevertheless, public procurement can strongly contribute to industrial policy goals, especially regarding government intervention to protect strategic sectors, such as net-zero technologies (cf. Arroyo, 2026; Seidl & Wuttke, 2026). In public procurement, non-price criteria mandating diversification or domestic production of certain technologies in renewable energy auctions are used to limit dependence on foreign producers, thus protecting the European net-zero industry.

At the same time, European energy policy has evolved significantly. Governments initially relied heavily on subsidies to green the energy mix, such as feed-in tariffs and renewable energy certificates (Bayer & Urpelainen, 2016). This was complemented by carbon taxes to raise fossil fuel costs (Zhou et al., 2019). More recently, auctions have become the primary tool for allocating renewable energy development rights (Grashof, 2021; International Renewable Energy Agency, 2015). By 2021, 130 countries used auctions, a sharp increase compared to the previous decade (Anatolitis & Winkler, 2023). In these auctions, the bidder that commits to producing electricity at the lowest price wins the development rights as well as the support mechanisms. Although governments have for long pursued various goals through public procurement, the introduction of non-price criteria has *formalized* this possibility to not only judge bids on their price but also on other (non-price) criteria, such as the bid's attention to resilience, sustainability, justice, and capabilities. Renewable energy auctions are now thus *explicitly* leveraged by governments to achieve multiple policy objectives.

Although public procurement is increasingly leveraged for industrial policy goals, it is yet to be studied as an industrial policy instrument (cf. De La Cruz et al., 2026). Indeed, public procurement can be used to protect domestic sectors. We study this phenomenon through a central manifestation of this trend: the integration of non-price criteria in renewable energy auctions. Specifically, this article examines which European countries integrate non-price criteria into their offshore wind auctions, and which kinds of criteria they use. The offshore wind sector is used as a typical case, as 97 percent of its expected 2030 capacity will have been allocated through auctions (Jansen et al., 2022). The analysis focuses on Europe, where early adoption has resulted in a large share of installed offshore wind capacity and the sector faces increasing geopolitical competition (Wei et al., 2021, p. 2).

To answer the research question, we inductively create an analytical framework that groups non-price criteria in four categories: resilience, sustainability, justice, and capabilities. Leveraging this framework demonstrates that European states mainly integrate resilience measures into auctions when using non-price criteria. As such, resilience criteria form the main part of the analysis. This article therefore has implications for industrial policy beyond its "green" variant. Indeed, the use of resilience criteria is not limited to net-zero technologies. The proposed Industrial Accelerator Act, for instance, also introduced "Made in EU" criteria for steel, cement, and aluminum. As a plausibility probe to explain what kinds of non-price criteria are used, we link variation across time and countries to path dependency, changing market circumstances, government composition, and political economy institutions. In doing so, we contribute to the literature on green industrial policy by distinguishing the four types of non-price criteria in auctions and showing how the use of resilience criteria positions public procurement as an industrial policy tool.

The remainder of the article proceeds as follows. Section 2 positions public procurement as an instrument of industrial policy and shows how this plays out through non-price criteria. Section 3 justifies the case selection and the research design. Section 4 introduces an analytical framework to distinguish between four types of non-price criteria. Section 5 leverages this framework to describe which countries use certain non-price criteria categories; subsequently, it discusses the observed intertemporal and cross-country variation. Section 6 concludes.

2. Green Industrial Policy Through Non-Price Criteria in Public Procurement

Global climate policy was long oriented towards dividing the costs of mitigation measures (Meckling, 2025). However, since the geoeconomic turn in trade and environmental policy, states compete in a green technological race to reap the benefits of the production of net-zero technologies (Allan et al., 2021; Babić et al., 2024). In Europe, governments have started to apply the logic of industrial policy to the renewable energy sector, intervening in the economy to protect sectors that are deemed strategic (cf. Arroyo, 2026; Seidl & Wuttke, 2026). We therefore define green industrial policy as policy interventions to stimulate the domestic production of net-zero technologies, such as electrolyzers, wind turbine components, and solar photovoltaics (PVs; De La Cruz et al., 2026, p. 2).

The EU and its member states adopt two approaches to do so (De La Cruz et al., 2026). First, EU member states subsidize domestic producers of net-zero technologies through national state aid. These subsidies are expended individually (Di Carlo et al., 2024) or through coordinated projects (De La Cruz, 2026; Lopes-Valença, 2024). Although the EU does not expend supranational subsidies, it does stringently regulate member states' market interventions: Through "regulatory interventionism," the EU guides and constrains national subsidies (Bulfone, Di Carlo, & Seidl, 2026, p. 2; see also Bulfone, Miró, & Moschella, 2026). The European Commission selectively directs state aid to the green transition through General Block Exemption Regulations (GBER) and schemes such as the Temporary Crisis and Transition Framework (TCTF) and the Clean Industrial State Aid Framework (CISAF).

Second, the EU employs trade restrictions to protect its domestic producers against (what it considers) unfair trade practices. Over the past decade, the EU has expanded its trade policy toolbox of safeguards, as well as anti-dumping and anti-subsidy measures to new unilateral instruments, such as the International Procurement Instrument, the Foreign Subsidies Regulation, and the Carbon Border Adjustment Mechanism (De Ville et al.,

2023). This article will demonstrate that resilience criteria, that strengthen the security of supply of net-zero technologies, contribute to green industrial policy goals by protecting European actors in line with the second approach. By requiring to diversify supply or source equipment from within the EU, resilience criteria de facto restrict imports from foreign competitors. The EU's proposed Industrial Accelerator Act is a case in point. Representing over 15 percent of global GDP, the procurement market holds huge potential to shape green industrial policies.

Public procurement concerns all processes in which governmental bodies acquire goods and services from private firms, and is mainly carried out through negotiations and auctions (Lalive & Schmutzler, 2011). The key difference between the two is that the former consists of direct talks between a public body and a firm, minimizing competition between companies, while the latter entails a public call, resulting in an open and competitive bidding procedure. Previous research has identified three defining characteristics of auctions: (a) the allocation of goods or services by a public body, (b) whereby the price is formed through a bidding procedure, that (c) entails an element of competition (Jansen et al., 2022; Mathieu & Valenzuela, 2025). In renewable energy auctions, the bidder that commits to producing electricity at the lowest price wins the development rights and the related support mechanisms.

This article examines how public procurement is used as a green industrial policy instrument by analyzing the main application of this phenomenon: the integration of non-price criteria in renewable energy auctions. Multi-criteria auctions score bids on several dimensions, enabling governments to achieve industrial policy objectives, such as securing access to net-zero technologies. Importantly, improving the security of supply of these technologies and their upstream components does not by definition entail local content requirements, as this goal is also achieved through diversification. For example, in the second auction of the European Hydrogen Bank launched in 2024, the resilience criterion ordered bids to limit the share of electrolyzer components sourced from China to 25 percent (European Commission, 2024, p. 7). The Net-Zero Industry Act requires the introduction of a similar resilience criterion in renewable energy auctions, enabling governments to restrict the imports of net-zero technologies. Yet, despite this convergent pressure, the use of non-price criteria across European countries varies.

As auctions are now the dominant mode of renewable energy deployment (Jansen et al., 2022), the use of non-price criteria warrants scholarly attention (Anatolitis & Winkler, 2023; Grashof, 2021). While extant studies have analyzed local content requirements, research on other types of non-price criteria has been limited. Moreover, previous research on the design of renewable energy auctions has centered around the effects of these choices, analyzing the realization rate (Kreiss et al., 2017) and (support cost) effectiveness of renewable energy auctions (del Río, 2017; Gephart et al., 2017). Hence, questions remain as to which types of non-price criteria are integrated into auctions, and how this differs across time and countries. The following section outlines the case selection and research design adopted to answer these questions.

3. Case Selection and Research Design

Building on an existing dataset, we examine all offshore wind energy auctions in Belgium, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Lithuania, Malta, Netherlands, Norway, Poland, and the United Kingdom. As such, the European offshore wind sector forms a typical case: European states and firms pioneered the adoption of this technology, maintaining a large share of installed offshore wind capacity to

date (Wei et al., 2021, p. 2). All countries within the scope of the analysis share similar characteristics, being high-income countries as well as (until recently) members of the European Economic Area. Due to heightened international technological competition, the sector also faces pressure across all these states. This study thus proceeds through a most similar systems analysis, where the use of non-price criteria diverges despite the shared features of the assessed countries. As such, the analysis provides a small-*N* comparison of the auctions and countries that employ non-price criteria.

The case selection builds on WindEurope's (2026) auction database, which includes (planned) tenders from 2005 through 2028 in the EU, Norway, Switzerland, Turkey, Ukraine, and the United Kingdom. Possible cases consist of auctions launched or scheduled under a publicly published legal framework ($N = 242$). This includes launched tenders that were successful or failed, as well as announced tenders of which the legal framework has been confirmed. Scheduled tenders for which the legal framework is not yet known, or postponed tenders that will not be re-launched under their current national framework are excluded. Seabed leases are excluded as well because they do not allocate renewable energy development rights: A seabed lease merely grants the winner the right to develop an area of the seabed. As this does not require the actor to develop an offshore wind farm, developers also compete with other seabed uses (Simo Laido et al., 2024). The remaining cases were included in the analysis ($N = 139$). Each auction in the database is assigned a unique identifier, composed of a two-letter country code and a project number. For every tender, both primary and—if available—secondary sources were identified. The former consists of legislation and tender documents; the latter of EU state aid decisions and notices from Tenders Electronic Daily (TED).

Renewable energy auctions allocate development rights and support mechanisms through a two-step procedure. First, bids are assessed on *prequalification criteria* to determine whether they meet the minimum requirements to participate in the auction. Bids only proceed to the following round if they meet these criteria. In a second phase, the auctioning authority determines the winning bid based on its scores on the *award criteria*. These criteria and score grids are published in tender documents or national legislation. All prequalification and award criteria were inductively coded following a document analysis of the data. The codes are presented in the analytical framework (see Table 2). Each criterion was attributed to a dimension that corresponds to a broader category. These categories and dimensions adhere to the inductively developed definitions outlined in Section 4. Inter-coder reliability was assessed by recoding a representative subsample of a fifth of the cases ($N = 27$), in line with standards of good practice (O'Connor & Joffe, 2020, p. 5). The inter-coder reliability is strong, as Cohen's kappa for interobserver agreement is "almost perfect" ($\kappa = 0.85$; Landis & Koch, 1977, p. 165).

All data can be consulted through the authors' database, available in the Supplementary File. *Prequalification criteria* were coded binary because of the binary logic of the prequalification stage: If a bid meets these requirements, it proceeds to the award phase; if the bid does not meet the requirements, it does not proceed (see above). Prequalification criteria are therefore not assigned relative weights in the tender documents. As such, the database reports their presence (1) or absence (0) and the number of included categories and dimensions of the analytical framework. For *award criteria*, the assigned weight of each category and dimension is reported. Because government agencies might score bids inconsistently, we process the weights attributed to each non-price criteria category in the abovementioned documents rather than actual scores received by individual bids.

Before proceeding, three caveats are in order. First, the success or failure of bids is beyond the scope of the article, as it analyzes which types of non-price criteria governments use. Second, quantitative data on prequalification criteria are only briefly presented in the analysis, as the present article focuses primarily on award criteria. After all, the latter paints a clearer picture of the importance governments attribute to various kinds of non-price criteria, expressed in weights and score grids. Third, the analysis only considers criteria that were *explicitly* set by governments. Broader exclusion criteria included in general legislation, such as criminal convictions and outstanding tax liabilities, are beyond the scope of this study.

To triangulate the findings, interviews were conducted with a civil servant and a cabinet official, covering dynamics in both the auctioning governments and administrations (see Table 1). As the number of interviews is limited, these are not representative of the full sample of auctions.

Table 1. List of interviewees.

Interview no.	Position	Date
1	Tender coordinator, national administration of an EU member state	2026-05-26
2	Former cabinet official for the Minister of Energy of an EU member state	2026-05-29

4. Analytical Framework: Categorizing Non-Price Criteria

This section introduces an inductively developed analytical framework that distinguishes between four types of non-price criteria: resilience, justice, sustainability, and capabilities (see Table 2). Where necessary, these categories are further disaggregated into dimensions and criteria. Each criterion is attributed a code; examples of the codes and their sources are provided as well through the auction identifier. Price is not considered a non-price criterion, but is included to provide a complete overview of all criteria used in offshore wind energy auctions. While the price category is not further discussed as this is beyond the scope of the article, it is worth noting that auctioning authorities may operationalize the price criterion in various ways, such as support or strike price, annual quantity of promotion, and value of the generated reference price.

First, we adopt a broad conception of *resilience* as improving energy system integration, industrial base development, and security. While this leads to a more detailed coding of the resilience category vis-à-vis justice, sustainability, and capabilities, this reflects the various meanings attributed to this concept in academic literature and policy documents. The *energy system integration* dimension includes criteria aimed at enhancing grid flexibility and system resilience (Jiang & Liu, 2023, p. 24). The *industrial base* dimension captures criteria that bolster the domestic industry by securing infrastructure as well as access to know-how and skills (Khan et al., 2023, p. 8). These include fostering innovation that strengthens the broader energy system through R&D, domestic supply chain strengthening, involving SMEs, and efforts to secure a skilled workforce through training. The *security* dimension addresses risks related to economic, physical, and energy security. Economic security criteria aim to reduce dependence on third countries for net-zero technologies or upstream components through diversification requirements (Khan et al., 2023, p. 2; Monie et al., 2025, pp. 9–11). Physical security criteria introduce measures to mitigate and manage maritime security risks. Finally, energy security criteria aim to reduce reliance on energy imports by prioritizing high production volumes within the tendered area to continue delivering energy services (Azzuni & Breyer, 2018, p. 13; Monie et al., 2025, p. 4).

Table 2. Analytical framework: Classification of non-price criteria in offshore wind energy auctions.

Category	Dimension	Criterion	Code	Example	Source
Price			Price	Value of the bid strike price	BE01
Resilience	Energy system integration		Res1	Flexibility services by storage or demand response	EE10
	Industrial base	R&D	Res2	Rating of R&D activities	FR05
		Supply chain strengthening	Res3	Production capacity: Score for new or current manufacturing capacity for offshore wind components	FR06
		SMEs	Res4	Minimum share of maintenance, servicing, and operation services that the applicant undertakes to have carried out by SMEs	FR08
		Skilled workforce	Res5	Contribution to securing a skilled workforce	DE18
	Security	Economic security	Res6	Diversification of supply of major components (less than four components); Rate of supply of permanent magnets from a dominant third country	FR14
		Physical security	Res7	Rating of the control of risks related to maritime safety	FR05
		Energy security	Res8	The extent of the supply of energy generated in the tendered area	DE18
Justice	Distributional justice	Financial participation	Jus1	Direct citizen participation up to 2 percent of the CAPEX	BE01
		Social employment	Jus2	Commitments concerning the professional integration of persons experiencing particular social or professional difficulties	FR15
	Procedural justice	Citizen involvement	Jus3	Efforts on participation, awareness-raising, and active involvement of citizens, included in a detailed citizen participation plan	BE01
		Responsible business conduct	Jus4	Applying due diligence	NL09
Sustainability	Environmental strain		Sus1	Noise pollution and seabed sealing associated with the foundation technologies used	DE18
	Circularity		Sus2	Recycling or re-use rate of blades	FR09
	Decarbonization		Sus3	Contribution to the decarbonization of the expansion of offshore wind energy	DE18
Capabilities	Firm-level capabilities	Technical	Cap1	Experience in the construction and development of offshore wind farms	FR06
		Financial	Cap2	Financial strength and guarantees of the responsible party	NL07
	Project management	Risk management	Cap3	The quality of the risk assessment and analysis	NL03
		Financial robustness	Cap4	Robustness of contractual and financial arrangements	FR11

Second, states leverage *justice* criteria to ensure a just energy transition. Extant studies have conceptualized energy justice through recognition justice, distributional justice, and procedural justice (see e.g., Sovacool & Dworkin, 2015). The former is not discussed as it has not been integrated into the auctions in the sample. *Distributional justice* concerns the just allocation of benefits and burdens across society. This dimension appears in two criteria: (a) mechanisms that allow citizens to financially participate in the project, such as direct shareholding or crowdfunding; and (b) social employment requirements, aimed at providing job opportunities for vulnerable groups. *Procedural justice* relates to the fairness and inclusiveness of the decision-making processes. Within this category, criteria include the involvement of citizens with the project and requirements to implement responsible business conduct procedures.

Third, governments incorporate *sustainability* criteria to accelerate the green transition. This category is aimed at reducing environmental and climate impacts by reducing environmental strain, improving circularity, and accelerating decarbonization. The *environmental strain* dimension includes criteria that seek to limit and mitigate environmental impacts, enhance seabed ecology, and stimulate innovation to address related environmental challenges. The *circularity* dimension comprises criteria encouraging bidders to maximize recycling and reuse of components. Although such measures also secure supply chains for critical components—which relates to the resilience category—their primary goal is oriented towards reducing environmental impact. Finally, *decarbonization* criteria assess the carbon footprint of the project or require bidders to reduce emissions across the supply chain.

Fourth, auctioning authorities also assess the *capabilities* of the bidding firm and the project. The dimension of *firm-level capabilities* encompasses two elements: (a) the technical experience of the party responsible for developing, constructing, and/or operating the offshore wind farm; and (b) the financial strength of the bidder, typically demonstrated by the level of committed equity and the provision of financial guarantees. Closely related, the *project management* dimension assesses the feasibility and financial solidity of the project itself. On the one hand, risk management concerns the bidder's assessment of project risks and the strategies proposed to mitigate them regarding financial planning, construction, and operation of the offshore wind farm. Financial robustness, on the other hand, refers to the contractual and financial arrangements that ensure that the project is economically viable and financially sound.

5. Results

Before proceeding, we briefly discuss the use of prequalification criteria. These criteria are well established in European offshore wind auctions: 55 percent of tenders apply at least one non-price criterion to determine if a bidding firm may participate. More than 80 percent of those tenders include at least one criterion related to firm-level capabilities, indicating that governments primarily employ prequalification criteria to ensure that bidders possess the capability to deliver the project. These criteria take the form of technical requirements and financial requirements. Twelve out of the 14 countries in the sample use prequalification criteria. The remainder of the analysis focuses on award criteria, as their weights and score grids give the best insight into the importance governments attribute to various kinds of non-price criteria. For these criteria, the results show intertemporal and cross-country variation in the adoption of non-price criteria and the categories used. In what follows, this double variation is described (Section 5.1) and tentatively explained (Section 5.2).

5.1. Descriptive Analysis

In the award phase, non-price criteria are applied in 44 auctions, representing roughly a third of the total sample (N = 139). Across all cases, non-price criteria account for an average weight of 14.7 percent in the award decision. However, when only examining auctions that use non-price criteria during the award phase, their average weight triples to 46.5 percent. In other words, in tenders that use non-price criteria, award criteria account for nearly half of the points. This discrepancy is largely driven by the Netherlands, which awarded bids almost entirely based on non-price criteria. The variation in the adoption of non-price criteria is visualized in Figure 1, which maps the weight of non-price criteria vis-à-vis the total amount of award points available (vertical axis) over time (horizontal axis).

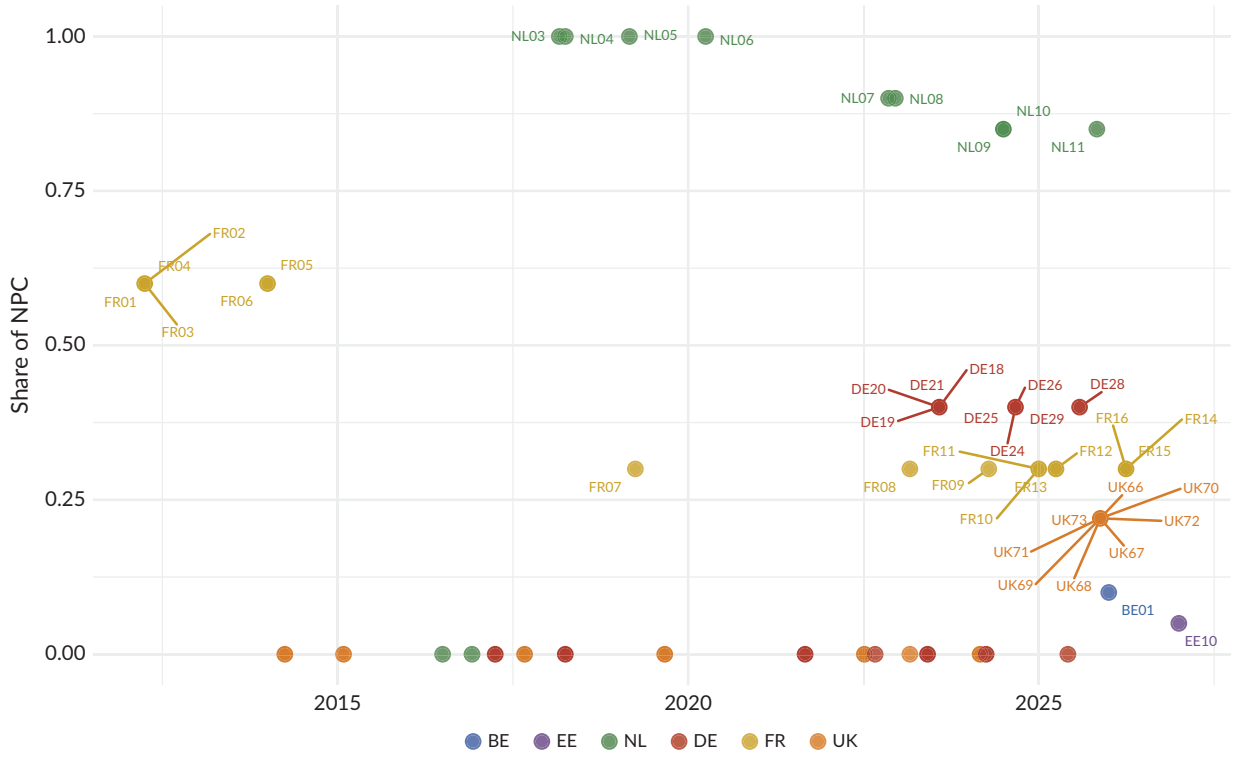

Figure 1. Share of award points attributed to non-price criteria over time. Notes: NPC = non-price criteria; auctions that do not use non-price criteria are excluded from the figure for clarity; BE = Belgium; EE = Estonia; NL = the Netherlands; DE = Germany; FR = France; UK = United Kingdom.

Two observations stand out. First, allocating development rights based on criteria other than price is limited to a select club of countries, indicating strong cross-country variation: Two-thirds of European countries in the sample have not done so. In the award phase, non-price criteria are used by France, Germany, the United Kingdom, the Netherlands, Belgium, and Estonia. The six countries that use these criteria in the award phase also do so in the prequalification stage. Second, across time, Figure 1 shows an increase in the use of non-price criteria, especially after 2022, when all six countries launched tenders containing these criteria. However, intertemporal variation within countries is limited: Once a country adopts non-price criteria, they often continue to do so in subsequent tenders. France (2012) and the Netherlands (2018) have incorporated non-price criteria from the outset of their offshore wind development and continue to apply these criteria consistently across their auctions. By contrast, Germany (2023) and the United Kingdom (2025) have recently begun to move from price-led auctions to integrating non-price criteria, reaching levels similar to

France. Although changes have occurred in Germany and the United Kingdom, their shares have also been relatively stable since they first introduced these criteria. Belgium and Estonia—each with only one auction in the database—have also introduced these, albeit to a more limited extent.

Besides variation in the adoption of non-price criteria as a whole, countries that use these criteria also vary in terms of the categories they apply as set out in the analytical framework (see Table 2). This variation in the use of non-price criteria by category is disaggregated at the auction level (Table 3) and country level (Figure 2). Table 3 shows that non-price criteria are predominantly used to boost resilience, demonstrating that these criteria are employed to leverage public procurement as a green industrial policy instrument. Indeed, a third of all auctions in the sample apply resilience-related criteria in the award process. On average, across all auctions that apply non-price criteria, resilience measures account for more than 20 percent of the points used to allocate development rights or associated support mechanisms. Sustainability, capability, and justice criteria are part of the award stage as well, yet less frequently. In addition, they are also assigned less weight.

Table 3. Use of non-price criteria per category.

Category	Use in auctions (%)	Weight in auctions using non-price criteria (%)
Resilience	30.2	23.1
Sustainability	20.9	13.3
Capabilities	14.4	8.4
Justice	9.4	1.7

Notes: "Use in auctions" refers to all auctions in the sample, including cases in which no non-price criterion was integrated; "weight in auctions using non-price criteria" is calculated as the average weight of that category among tenders that employ non-price criteria.

The dominance of resilience criteria detailed in Table 3 is underpinned by a significant cross-country variation, which is depicted in Figure 2. For France and the Netherlands, *resilience* is the top priority. While the United Kingdom and Estonia show a more limited integration of this category, it is significant as it constitutes the only non-price criterion that was integrated into their auctions. Germany shows an equal use of resilience criteria as it does for sustainability. Belgium has not adopted this category. *Sustainability* is developed most strongly in the Netherlands and France, and more moderately in Germany. Other countries have not adopted sustainability criteria. *Capabilities* are strongly present in the Netherlands, and to a more limited extent in France. *Justice* is seldom integrated in tenders. Belgium, which included a justice criterion in its sole auction in the sample, forms a notable exception. France and the Netherlands show a minimal integration of this category.

A closer look at the resilience criteria used in these auctions reveals a strong focus on strengthening the domestic industrial base. This confirms that public procurement, through the integration of resilience criteria, is used for a green industrial policy goal: securing the supply chains of net-zero technologies. France pioneered the use of these criteria. In its first three allocation rounds, over 60 percent of non-price criteria were resilience-related, mainly aimed at building a domestic industrial base, supply chain strengthening, SME participation, and strengthening R&D. In some tenders, developers could score additional points for using French production facilities; even higher scores were awarded for establishing new domestic manufacturing capacity. Similarly, in its 2025 allocation round, the United Kingdom introduced a Clean Industry Bonus intended to bolster domestic supply chains. In addition to the standard contract for difference allocation, an additional fund of 544 million GBP was made available for bidders committing to invest more than 100 million GBP per GW.

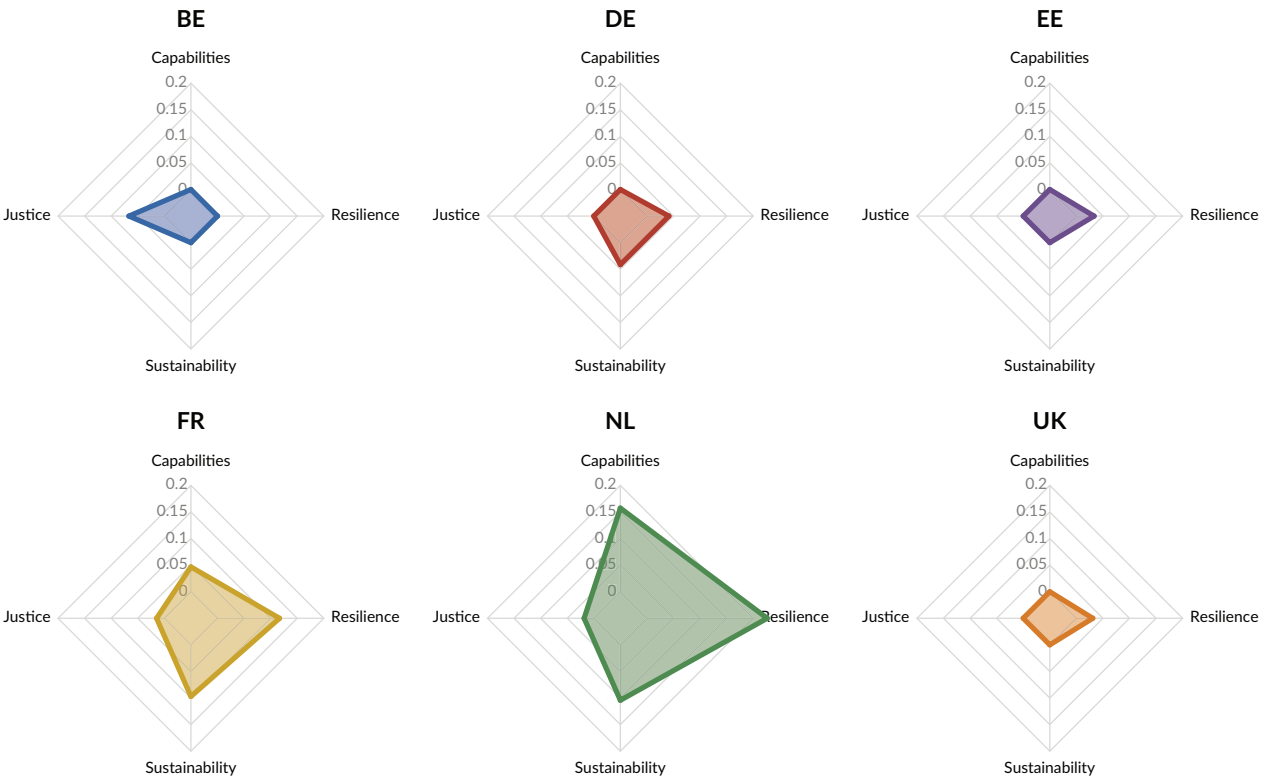

Figure 2. Use of non-price criteria per category for selected countries. Notes: BE = Belgium; DE = Germany; EE = Estonia; FR = France; NL = the Netherlands; UK = United Kingdom.

5.2. Explaining Intertemporal and Cross-Country Variation

The previous section identified intertemporal and cross-country variation as to which countries use non-price criteria and which categories of these criteria they integrate in auctions. This section tentatively explains this double variation through plausibility probes. Given the limited number of countries that apply these measures, we do not aim to generalize claims about the drivers of these phenomena.

Regarding the cross-country variation in the *use of non-price criteria*, two shared characteristics stand out (see Figure 1). First, Germany, the United Kingdom, France, and the Netherlands are among Europe's largest economies in terms of GDP. Second, and more fundamentally, these countries have a strong domestic capacity in offshore wind or a strong ambition to achieve such capacity. The United Kingdom (17 GW) and Germany (9.6 GW) already had mature sectors before introducing non-price criteria (WindEurope, 2026; see also Wei et al., 2021, p. 2), while the Netherlands (4.7 GW) and Belgium (2.3 GW) are also widely regarded as early adopters. In France, the integration of resilience criteria was strongly driven by an ambition to achieve this domestic production capacity, in line with the dirigiste traditions of the French political economy (see below). This has led to France catching up (1.9 GW). Consequently, these countries, together with Denmark, are the only European countries that exceed 1 GW of installed offshore wind capacity, which may explain why other countries refrain from using non-price criteria. Without a mature domestic market, policymakers may opt for price-based allocation mechanisms to avoid overburdening bidders. Estonia is an interesting exception, as it applies non-price criteria in spite of its limited market maturity, albeit on a relatively small scale (non-price criteria account for a mere 5 percent of the award points). By contrast, Denmark wields a well-developed

offshore wind market but does not integrate non-price criteria in its award process. Copenhagen has however pursued similar goals in other ways, by for instance mandating 20 percent state co-ownership in its most recent auctions (Klima-, Energi- og Forsyningsministeriet, n.d.).

The descriptive analysis also revealed intertemporal continuity: Once countries adopt non-price criteria, they often continue to integrate these measures in subsequent tenders (see Figure 1). This phenomenon is explained through *changing market circumstances* and path dependencies. In several countries that use non-price criteria, the auction designs for offshore wind were developed amid expectations of continued investment cost decreases, leading policymakers to believe that tendering offshore wind energy development rights was possible without subsidies (Interviews 1, 2). These beliefs were solidified after the 2016 auction of Borssele III and IV in the Netherlands, where the development rights were awarded at a price of only 5.45 cents/kWh. These favorable market conditions provided governments with the opportunity to integrate "nice-to-haves" in their legislative frameworks (Interview 2). However, this created a *path dependency* (Steinmo et al., 1992). Because of the time-consuming nature of renegotiation efforts, the political and administrative costs of adapting these frameworks are high. The resulting path dependency thus implied that governments could not adjust the designs of subsequent auctions tendered in more challenging market circumstances, due to macroeconomic slack and heightened technological conflict. This led to a lack of bids (United Kingdom, France, Germany, and the Netherlands) or postponement (Belgium), causing failed tenders in nearly all countries that used non-price criteria. Governments subsequently responded by re-integrating the award of subsidies and/or changing the nature of non-price criteria (Interview 1).

Besides cross-country variation in the adoption of non-price criteria in general, the descriptive analysis also showed that countries differ in terms of the *categories* they integrate: Each country prioritizes resilience, sustainability, capabilities, and justice in a different order (see Figure 2). We link these varying patterns to changing market circumstances, government composition, and political economy institutions. First, regarding *changing market circumstances*, several developments impacted the adoption of non-price criteria. In the Netherlands, the industry signalled that system integration and environmental impacts emerged as "major challenges resulting from the scale-up" of offshore wind (Interview 1). To address these challenges, the non-price criteria for Hollandse Kust West VI and VII were oriented toward resilience (advancing energy system integration) and sustainability (reducing environmental strain).

In 2022, the EU was confronted with Russia's full-scale invasion of Ukraine, which heralded in a near-complete decoupling of Russian fossil fuels. This watershed moment ushered in a new geopolitical and economic reality, characterized by heightened macroeconomic and supply chain pressures. This specific period of crisis and adjustment prompted several countries to introduce new resilience criteria into their offshore wind auctions. While these developments posed challenges for all European countries, the intensity of this decoupling was particularly strong for Estonia, where the reliance on Russian natural gas was more pronounced than elsewhere in the EU. As a result, Tallinn explicitly identified energy storage and system integration as national priorities (Keskkonnaministeerium & Majandus- ja Kommunikatsiooniministeerium, 2023). These energy security concerns led to the inclusion of a resilience criterion on energy system integration. Similarly, during the same period, the United Kingdom introduced a resilience criterion in the form of its Clean Industry Bonus (see above). In doing so, London rewarded bids that invested significantly in mitigating supply chain vulnerabilities that became apparent during this period.

Second, *government composition* also impacts tender design. Belgium's auction of the first lot of the Princess Elisabeth Zone included justice criteria on direct citizen participation and raising public awareness. This grew out of the desire of the Minister of Energy—a member of the Flemish Green Party—to create "*societal* added value" alongside mere economic added value (Interview 2, emphasis added). Following legal issues regarding the tender framework and connection to the electricity grid, the auction was cancelled. After the next election cycle, the Greens were no longer part of the government coalition. The new tender, administered by the new coalition of socioeconomically center-right parties and the Flemish socialists, will not include these justice criteria (Bihet, 2026). Both the inclusion and alteration of this measure illustrate how non-price criteria are shaped by government composition.

Third, *political economy institutions* distinctly shape the categories of non-price criteria states use. France is characterized by a tradition of dirigisme and strong state interventionism (Bora, 2024; Seidl & Schmitz, 2024). The abovementioned resilience criteria, aimed at strengthening the industrial base, demonstrate that Paris leverages tender design to restructure its offshore wind sector (see Section 5.1). Indeed, a country's use of non-price criteria is strongly impacted by its views on state–market relations (Interview 1). The French example is a case in point, as it pioneered resilience criteria, introducing them as early as 2012.

Conversely, states without these dirigiste political economy institutions do not allocate subsidies in combination with the application of strict resilience criteria. Germany applies non-price criteria in its auctions but does not attribute state aid. This is consistent with its institutions of a coordinated market economy: The German model of "Mitbestimmung" institutionally locked in the preferences of employer organizations and trade unions. To the liking of the former, the state does not steer the economy through subsidy programs as in the French case. Instead, it coordinates long-term financing through public banks. This explains why Germany uses non-price criteria without an accompanying subsidy mechanism. Criteria aimed at securing a skilled workforce, accounting for half of the weight of the resilience criteria used in German tenders, is explained by the domestic institutions tailored to vocational training (Streeck, 2009, pp. 35–36). Again, this is an outcome of the "Mitbestimmung" model: Just like employer organizations, trade unions have their say in the state's economic policy, leading to the government co-financing the vocational training needed to supply the skills for the sectors it prioritizes in the economy (in this case, the offshore wind sector).

Similarly, the Netherlands has tendered several times without allocating subsidies. Since the Dutch successfully auctioned Hollandse Kust Zuid I and II using non-price criteria, they have been reluctant to subsidize the offshore wind sector (Interview 1). Again, this is explained by the Dutch political economy institutions. The Dutch "polder model" locks in consultation between the government, employer organizations, and trade unions (Touwen, 2014). This deliberative institution explains why, similar to Germany, the Dutch state does not intervene in the economy in a dirigiste fashion. Moreover, the Dutch political economy contains institutions that curb public spending. The Ministry of Finance tightly controls the budget: Administrations are expected to fix any budget deficits internally, decreasing the appeal of large-scale industrial subsidies. Indeed, the Netherlands aims to bolster a "healthy" offshore wind sector that functions well without public support (Interview 1; see also Harmsma, 2024, p. 1331). Furthermore, the Netherlands has strong institutions relating to market-driven innovation. The state foresees an important responsibility of the private sector in innovation, as evidenced by large-scale R&D investments by Dutch multinationals (van Zanden, 2014). As a consequence, some Dutch tenders were almost exclusively designed

to reward innovation in minimizing environmental strain and energy system integration, explaining the developed integration of resilience criteria (Interview 1). Finally, the strong representation of the capability category in the Netherlands is also no surprise, given the country's attention to strategic foresight (Habegger, 2010). For example, the first auctions containing non-price criteria (Hollandse Kust Zuid I and II) focused primarily on project management and firm-level capabilities.

6. Discussion and Conclusion

Net-zero industries are now an arena of geoeconomic competition, as states compete to reap the benefits of decarbonization (Meckling, 2025). Previous research has studied how the EU positions itself and which tools it wields in this green technological race (Allan et al., 2021; Siddi & Prandin, 2023). Yet, limited attention has been paid to how public procurement is used as a green industrial policy tool. This article bridged this gap by studying non-price criteria, a central instrument in this shift. For offshore wind energy auctions, the analysis revealed intertemporal and cross-country variation in the adoption of non-price criteria in general as well as for its specific categories of resilience, sustainability, justice, and capabilities. This variation was explained through changing market circumstances, path dependency, government composition, and political economy institutions. As such, this article contributes to the literature on green industrial policy by showing how European countries use public procurement for green industrial policy goals through non-price criteria. Importantly, as resilience criteria are also applied outside the net-zero sectors, such as steel, cement, and aluminum in the Industrial Accelerator Act, our findings also travel to literature on industrial policy more broadly.

In an age of green technological conflict, the EU has become increasingly wary of unfair competition, especially from China. This was exemplified by European Commission President Ursula von der Leyen in her 2023 State of the European Union address, where she stated that the EU had "not forgotten how China's unfair trade practices affected our solar industry" (von der Leyen, 2023). This ideational shift has also led to institutional changes in the European Commission, enabling geoeconomic policies (Couvreur, 2025). In this context, the use of non-price criteria has become more widespread, leading to their deliberate integration into renewable energy auctions as a form of green industrial policy. This is exemplified by the resilience criterion in the Net-Zero Industry Act, which mandates that renewable energy auctions contribute to the EU's security of supply through diversification or domestic production if a net-zero technology exceeds certain import dependency limits. Despite this convergent pressure, our analysis still reveals cross-country variation in the adoption of non-price criteria. However, as the Net-Zero Industry Act and the implementing regulation on auctions for renewable energy deployment have entered into force in December 2025, more EU member states will likely adopt resilience criteria in the future. The newly proposed Industrial Accelerator Act is set to reinforce this dynamic, as it introduces "Made in EU" requirements for public procurement. By late 2026, the European Commission will also propose a revision to the EU's public procurement directives, likely along the same lines. As a result, more states will include resilience criteria aimed at strengthening Europe's industrial base.

This article has introduced an analytical framework to examine which non-price criteria governments use in the award phase. However, prequalification criteria—that determine which bids are eligible—also frequently contain non-price criteria (Interviews 1, 2). Future research endeavors could therefore explore the politics underpinning this phase of public procurement. More broadly, as public procurement is increasingly leveraged

as an instrument of green industrial policy, this leads to a set of new questions: Do these same dynamics play out in other net-zero sectors and regions? Are these developments a consequence of increased state interventionism in the geoeconomic era, or were government policies instrumentalized by private actors to advance their corporate geoeconomic interests (cf. Choer Moraes & Wigell, 2022)? Subsequent studies could apply our analytical framework, test the plausibility probes on cross-country variation in other contexts, and further deepen our understanding of the power struggle between private and public actors in this arena.

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Conflict of Interests

Simon Rogissart worked as a policy officer on offshore wind energy at Belgium's Federal Public Service Economy from 2023 to 2024. Ruben De La Cruz declares no conflict of interests.

Data Availability

The auction dataset and codebook are available as supplementary material and on Zenodo: https://doi.org/10.5281/zenodo.21997692

LLMs Disclosure

Microsoft 365 Copilot was consulted while programming in R to generate code snippets and refine the script.

Supplementary Material

Supplementary material for this article is available online in the format provided by the authors (unedited).

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