GWEC IMPACT REPORT

Powering the Future With Wind

Marking 20 Years of Extraordinary Global Growth

GWEC
GLOBAL WIND ENERGY COUNCIL

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01 FOREWORD

Foreword

Since GWEC was founded in 2005, the wind sector has cemented its position at the heart of the renewable energy transition. In 20 years, global wind capacity has grown over twenty-fold, surpassing 1.1 TW or 8% of global electricity generation.

Investment in wind energy is today recognised as indispensable to addressing climate change and achieving energy security. All around the world, windfarms are reducing carbon emissions and shielding economies from volatile fossil fuel markets, while also delivering a multitude of wider economic and social benefits.

Onshore wind is the cheapest clean energy source on the planet[1], while offshore wind is among the best value with system-wide benefits due to its increasingly firm power. Onshore and offshore wind are also the cleanest of all renewable energy technologies measured by their median lifecycle GHG intensity[2].

There should be no either/or debate when it comes to choosing between wind and other clean power sources. Wind power is the perfect complement to solar power, hydropower, and batteries, helping to balance generation when these other energy sources are unavailable or unable to meet demand.

[1]IRENA [2]IPCC

In a world of geopolitical uncertainty, wind is seen as a beacon of power system resilience and reliability and a guarantor of energy sovereignty. No country with its own homegrown wind power should have to fear a foreign dictator turning off the taps.

Turn back the clock to 2005, however, and the wind and renewable energy industries still had much to prove. The prevailing view back then, among market analysts and sceptics alike, was that we had a long way to go to seriously challenge conventional power sources.

Over the past two decades, the wind industry has played a pivotal role in changing the market outlook and turning sceptics into ardent believers. A coalition of pioneering manufacturers, developers and utilities has worked to build the business case for wind power and steadily won the confidence of policymakers and investors around the world.

The Global Wind Energy Council (GWEC), which was established to be the global voice of the wind industry, has played a critical role in this journey. Our association and our members have transformed perceptions of wind power and, in tandem, opened up new markets for renewable energy.

Ben Backwell
CEO, GWEC

In the 20 years since GWEC was founded, global wind capacity has grown over twenty fold.

In this inaugural Impact Report, we explore GWEC's activities and influence across the globe: through our policy advocacy, information activities, capacity building and industry development. We show how GWEC has educated and engaged governments, regulators, multilateral institutions and investors to mould a business and investment environment which enables wind projects to flourish.

Our proud history spans from spurring wind's emergence in the key – and now mature – markets of China, India, Brazil and South Africa, among other countries, to the current wave of emerging markets such as Colombia, Philippines and Vietnam.

GWEC's incredible team has played a significant role in advising on the development and co-creation of a rich tapestry of renewable energy laws and regulations all around the world, from the first wind energy auctions in Latin America to South Korea's Special Act on Offshore Wind which passed in 2025.

We're now at a new crossroads. In 2023, world leaders set a global ambition to triple renewable energy capacity by 2030 in order to keep the 1.5C target alive. This would mean the wind sector tripling existing capacity to at least 3TW by 2030. Achieving this target will require a monumental cross-sectoral effort to remove obstacles to new wind power projects, addressing supply chain constraints, trade and finance barriers, underinvestment in grids and storage, and permitting delays.

At the COP30 Summit in Belém, GWEC played a pivotal role in championing solutions to these challenges, working with our sister organisations the Global Renewables Alliance, Global Offshore Wind Alliance and Ocean Energy Pathway. While the summit ultimately fell short in achieving a global consensus on a roadmap for the phasing out of fossil fuels, important progress was made in mobilising a coalition in favour of a rapid phase out. We also saw the creation of a platform to combat sophisticated and well-funded disinformation campaigns orchestrated by opponents of renewable energy, which threaten the progress we have made.

No one organisation can tackle these problems alone. GWEC's strength has always been forged in its alliances. We could not fulfil our mission to support industry in building a greener and more sustainable planet without the continued support of our members and partners, local associations, governments, regulators, multilateral institutions, philanthropic funders and civil society organisations.

Working together, we have achieved an incredible amount in the last 20 years. Just imagine where the world could be, 20 years from now, if we can accelerate the sector's growth and realise our long-term goal of building 'way more wind'.

02 OVERVIEW

Wind Power

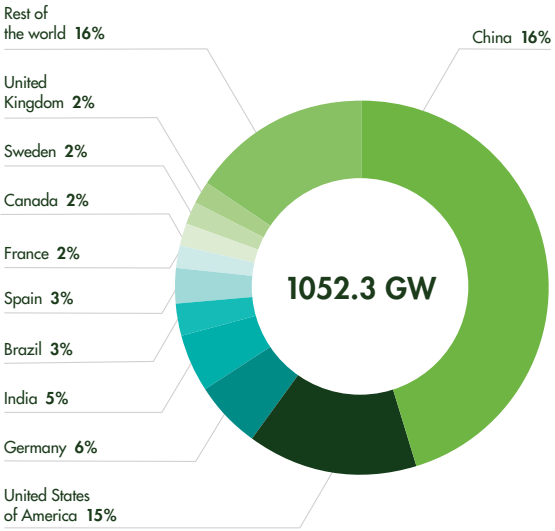
Where Are We Now

Since the first commercial windfarms were installed more than 40 years ago, wind power has arrived as a mainstream energy technology, delivering 8% of global electricity generation — equivalent to powering around 500 million homes.

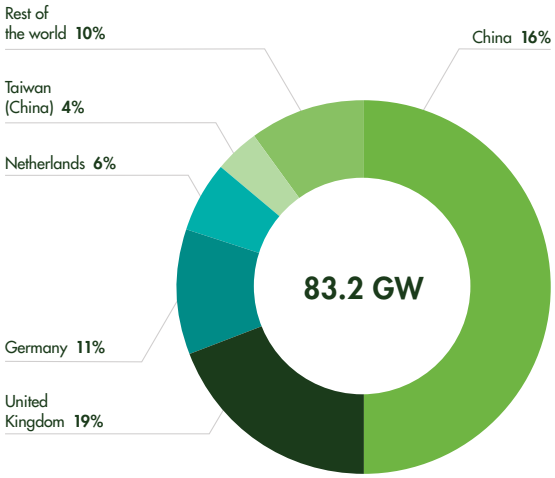
Wind turbines are now generating electricity to homes and businesses in 124 countries and counting, as governments commit larger shares of their power mix to wind energy. In countries like Denmark, Germany, the UK and Uruguay, wind power already provides at least one-third of electricity generation.

WIND POWER WORLDWIDE

Total installations onshore (%)



Total installations offshore (%)



Source: GWEC Market Intelligence and Global Wind Report 2025

124 countries
now generate electricity with wind power

8%
wind as a share of global electricity generation

500 million
equivalent homes powered by wind energy

WayMoreWind

In 2024, 55 countries installed new wind capacity, according to GWEC's 2025 Global Wind Report. Many other countries are enacting the enabling policies and regulations to ensure long-term wind energy growth, from the world's largest economies to emerging economies across Asia Pacific, Latin America and Africa.

How We Got Here

20 Years of GWEC | 20x More Wind

2005
GWEC formed to take wind power global

2007
Steve Sawyer appointed first Secretary-General

2018
Ben Backwell succeeds Steve Sawyer as CEO

2025
GWEC marks 20 year anniversary

2007 Europe
EU approves 20/20/20 plan

2009 COP15
GWEC launches Wind Power Works campaign

2011 Latin America
Brazil reaches 1GW wind power milestone

2015 Breakthrough
185 countries come together in Paris Agreement

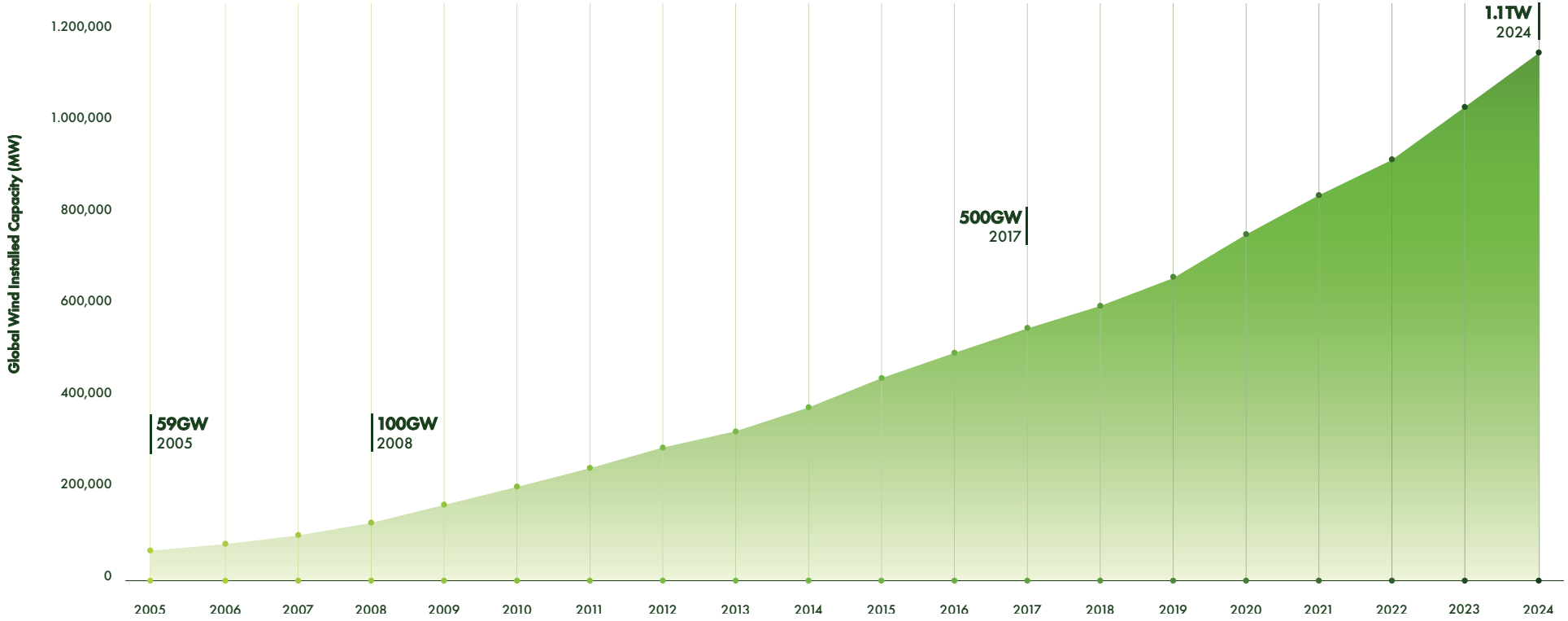
2017 Africa
Kenya completes Lake Turkana Wind Farm, the largest windfarm in Africa

2019 UK
World's largest offshore wind farm Hornsea I completed

2020 China
China achieves 50 GW wind installations in a single year

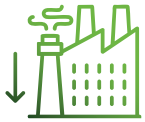
2021 Net Zero
At COP26 governments sign up to net zero target

2023 COP28
Countries pledge to triple renewable energy by 2030



Learn more about GWEC's journey and key achievements over the past 20 years on pages 19-29.

5 Reasons
Why We Need More Wind



1
REDUCING CARBON EMISSIONS

Wind power's zero carbon electricity is essential to displace carbon emissions and air pollutants.

Transitioning away from fossil fuels, the largest contributor to greenhouse gas emissions, is critical to mitigating climate change. Annual installations of wind should more than triple by 2030 to limit the worst impacts.

2
STRENGTHENING ENERGY SECURITY

Economies that invest in homegrown wind power are better protected from oil and gas market volatility and geopolitical turmoil.

Natural gas price volatility in Europe rose to an all-time high in 2022 induced by the steep decline in Russian piped gas deliveries[3].

3
LOWERING ENERGY BILLS

Wind energy is getting cheaper over time. The more wind power in the energy system, the less billpayers will pay over the long-term.

UK energy bills between 2010-2023 would have been £14.2bn higher if the electricity generated by wind farms had instead come from gas[4].

4
CREATING WELL-PAID JOBS

The wind industry is already employing 1.5 million workers, with hundreds of thousands more set to be recruited in the next few years.

The wind workforce could reach 6 million people by 2050 according to the International Renewable Energy Agency (IRENA)[5].

5
ENHANCING SYSTEM RESILIENCE

Complementarity is critical to energy system resilience. Wind is the ideal partner for most renewable energy systems.

Higher volumes of solar power and batteries will not deliver the energy transition alone. Wind's firm power picks up when solar fades into the night and during winter, and has a high level of seasonal complementarity with hydropower in key markets.

[3] IEA analysis 2025 [4] Research by University College London 2025 [5] IRENA Future of Wind Report 2019


RESILIENT
AFFORDABLE
GREEN
RELIABLE
CLEAN
SECURE
Wind Powering
the Future
Wind energy is transforming
the world for the better.
GWEC
GLOBAL WIND ENERGY COUNCIL

Who We Are

The Global Voice for Wind Power

2005
Year Founded

200+
Member Companies

30+
Affiliated National Associations

95%
World Wind Installed Capacity Represented by our Members

The Global Wind Energy Council (GWEC) is a member-based organisation that represents the entire global wind energy sector.

GWEC's mission is to unlock the potential of wind energy as a critical solution to enable the energy transition by working with governments, investors, and communities worldwide.

To accomplish this, GWEC advocates for a supportive policy, regulatory, social and investment environment, engaging decision-makers and stakeholders globally, regionally and nationally.

We seek to remove obstacles to wind power's growth and scale renewable energy deployment in a sustainable and equitable way.

GWEC is headquartered in Lisbon, Portugal, with regional offices located in Belgium, Brazil, China, Egypt, India, Kenya, Philippines, Singapore, the United Kingdom and Vietnam.

A Worldwide Community of Innovators

Collectively, GWEC's member companies and affiliates – manufacturers, developers, component suppliers, electricity providers, financial and insurance companies across more than 120 countries – have installed over 95% of the world's total wind capacity.

To advance the wind sector's future growth, GWEC collaborates closely with regional and national energy associations from both emerging and developed economies, including Europe, China, India and the United States.

Our members employ a combined workforce of more than 1.5 million people, and support hundreds of thousands more workers in connected industries across the global supply chain.

Accelerating Wind Energy

GWEC's mandate from our members is to communicate the role and benefits of wind power to multilateral institutions, national governments, peer industries, civil society and local communities.

GWEC supports our affiliated association members in driving growth in countries where wind power is an established energy source, and also works directly to accelerate the take-off of wind power in emerging economies across Latin America, Africa and Asia-Pacific regions.

We provide authoritative research and analysis on key trends in the wind power industry and clean energy transition to ensure decision-making reflects global best practices and an evidence-based approach.

We work with policymakers, industry and civil society to share transparent information about the progress and potential of wind power, enabling them to make informed decisions about energy policies.

We support cross-border collaboration between countries to help share best practices and experiences in adding clean power to the energy mix.

Our Leadership Team

Our Chair

Michael Hannibal was welcomed as the new Chair of GWEC in June 2025.

In a statement announcing his appointment by Board, Michael said: "GWEC has been representing this pioneering and innovative industry for 20 years and I am excited to work with the council's global team and diverse membership to continue scaling up wind capacity.

New markets are taking shape on every continent, both onshore and offshore, and I am excited about ensuring GWEC's vital work ensuring wind energy forms the foundation of the new global energy system continues.

Wind energy delivers clean and secure energy and is critical to avoiding a climate catastrophe. It is an honour to support GWEC on its mission, and to advocate for the wind industry on the global stage."

Michael, who is a Partner at Copenhagen Infrastructure Partners and Chief Commercial Officer at Stiesdal Offshore, follows his predecessors as Chair, Jonathan Cole (Corio Generation) and Morten Dyrholm (Vestas).

Girish Tanti serves as Corporate Vice Chair and Chair of GWEC India, and Elbia Gannoum serves as Vice Chair (Associations).

Girish Tanti
Vice Chair

Elbia Gannoum
Vice Chair

Michael Hannibal
Chair, GWEC

Our Secretariat

GWEC's Secretariat is led by CEO Ben Backwell and comprises a highly experienced and diverse team based in key markets around the world in Europe, Asia Pacific, Africa, the Middle East and South America.

Ben Backwell
CEO

Rebecca Williams
Deputy CEO

Senior Management Team and Regional Directors

Jessica Bricknell
Head of Finance

Feng Zhao
Chief Research Officer

Bruce Douglas
Chief Growth Officer

Joyce Lee
Director of Programmes and Partnerships

Heba Rabie
Director, GWEC MENA

Stewart Mullin
Chief Industry Officer

Lisa O'Doherty
Philanthropy and Grants Director

Roberta Cox
Policy Director, Brazil

Ann Francisco
Director of Asia Pacific

Wangari Muchiri
Africa WindPower Director

What We Do

Over the past two decades, GWEC's team has made the case for wind power, engaging with government leaders, policymakers and decision-makers to raise global ambition whilst setting out practical solutions to accelerate deployment.

Our Priorities

GWEC and our member companies are working to:

- Establish wind energy as the key technology solution for decarbonising the global energy system and achieving net zero by 2050.
- Remove existing barriers to wind power deployment in order to achieve the growth necessary to achieve energy system decarbonisation.
- Achieve the scale-up of wind energy deployment in a way that is sustainable and contributes to fairness and social justice.

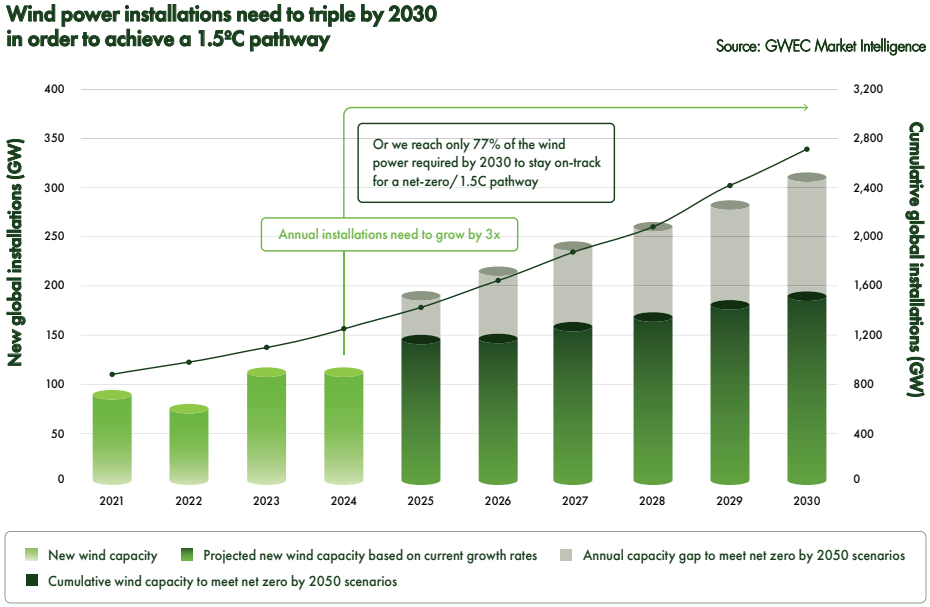
At an EU Ministerial meeting held at COP 30, in November 2025, GWEC CEO Ben Backwell urged policymakers to address disinformation, accelerate investment in grids, support competitive financing, and bolster supply chains to support wind and renewable energy deployment.

Our 2030 Goal

The wind industry reached the historic milestone of installing 1 Terawatt (TW) of wind energy in 2023. By 2030, GWEC expects this to at least double to 2 TW based on current policies.

GWEC's ambitious 2030 goal is to help countries go further and faster, with the aim of tripling global capacity to 3 TW by the end of the decade.

Achieving this target, in line with a global goal to triple all global renewable energy by 2030, can keep the world on-track to achieve net zero emissions by 2050 and limit the worst impacts of climate change, according to the International Renewable Energy Agency (IRENA).



How We Work

GWEC seeks to achieve maximum impact by accelerating clean energy production, value chain development and CO2 reduction in each of the regions and countries where we are active.

Our programmes and activities focus on the delivery of our 2030 goal, funded through a mix of funding streams, including membership fees, event sponsorship and grant funding.

Underpinning the strength of GWEC's work is its people: a highly skilled and diverse global team, headed up by an ambitious, strategic and well-connected leadership team.

GWEC and our members are active all over the world, working to build a global, non-partisan consensus in support of clean, affordable and resilient wind power, engaging with stakeholders from the public and private sectors, international institutions and civil society.

Our approach focuses on:

Global Engagement

GWEC works at the highest international political level to create a better policy environment for wind power.

Intergovernmental agreements on climate and energy policy will reverberate around the world. To help shape negotiations at forums such as the United Nations and influence decisions leading to voluntary or binding commitments, GWEC engages with a range of governments, multilateral institutions and civil society organisations.

As the wind sector's overarching representative at the annual United Nations Conference of the Parties (COP) and other global climate fora, GWEC provides a vital link between government negotiators and an industry that is expected to play a major role in reducing global greenhouse gas emissions.

We seek to ensure the wind industry's policy recommendations, grounded in practical experiences and focused around pragmatic solutions, are heard and well understood. This helps to raise global ambition and set the right conditions for accelerated growth in all regions.

Multilateral Partnerships

We work closely with leading international institutions such as the United Nations, the International Energy Agency (IEA), and International Renewable Energy Agency (IRENA), World Trade Organization (WTO) and others, which are instrumental in providing fora for governments and generating the economic modelling to inform global target setting.

As trusted advisers on the wind sector, GWEC's policy experts are regularly invited to share insights and policy proposals at working groups, committees and panels at the United Nations, IEA and IRENA, among other international agencies.

We also provide expert technical advice to international financial institutions such as the World Bank, International Monetary Fund (IMF) and European Bank for Reconstruction and Development (EBRD) to inform their research studies and lending practices in relation to renewable energy projects in emerging economies.

Regional and National Engagement

At the regional level, GWEC engages with governments and regional institutions such as the African Union (AU), Inter-American Development Bank (IDB), Latin American Energy Organization (OLADE), Asian Development Bank and Association of Southeast Asian Nations (ASEAN). This serves to drive regional integration on trade, supply chain planning and interconnections to help accelerate wind energy growth.

At the national level, GWEC is focused on connecting global best practices with local government institutions and policy makers to drive reform, working in collaboration with local wind and renewable energy associations. We engage with national and sub-national governments, regulators and demand-side consumers to help set the right policy and regulatory conditions to support new wind power projects.

Former Greenpeace Executive Director Jennifer Morgan with GWEC's Chair and CEO
At a GWEC-hosted Official UNFCCC Side Event

Policy and Advocacy

GWEC advocates for policies and regulations that create a supportive political, regulatory, social and investment environment for the onshore and offshore wind sector, helping to spur future growth.

Our team engages directly with senior leaders of global institutions, governments, industry and NGOs, ensuing the voice of the wind industry is heard at the highest levels.

We partner with national and regional wind and renewable energy associations across the world, ensuring the global wind community is strong and united.

Information and Education

GWEC has built a reputation as the authoritative source of information, research and statistics about the wind sector. Our publications, including the flagship Global Wind Report and Global Offshore Wind Report, as well as our deep-dives on the global and regional wind supply chains, help to shed light on the status and future progress of one of the world's fast-growing technologies.

GWEC Market Intelligence provides regular insights for members on the development of the sector, including data forecasts, market outlooks, country profiles, policy updates, and technical deep-dives. This information is accessible via a dedicated membership portal.

Industry and Business Development

GWEC is working to expand and strengthen the wind industry, creating a supportive environment for companies to address key challenges. GWEC's conferences, workshops and webinars seek to identify practical solutions and facilitate networking and sharing expertise.

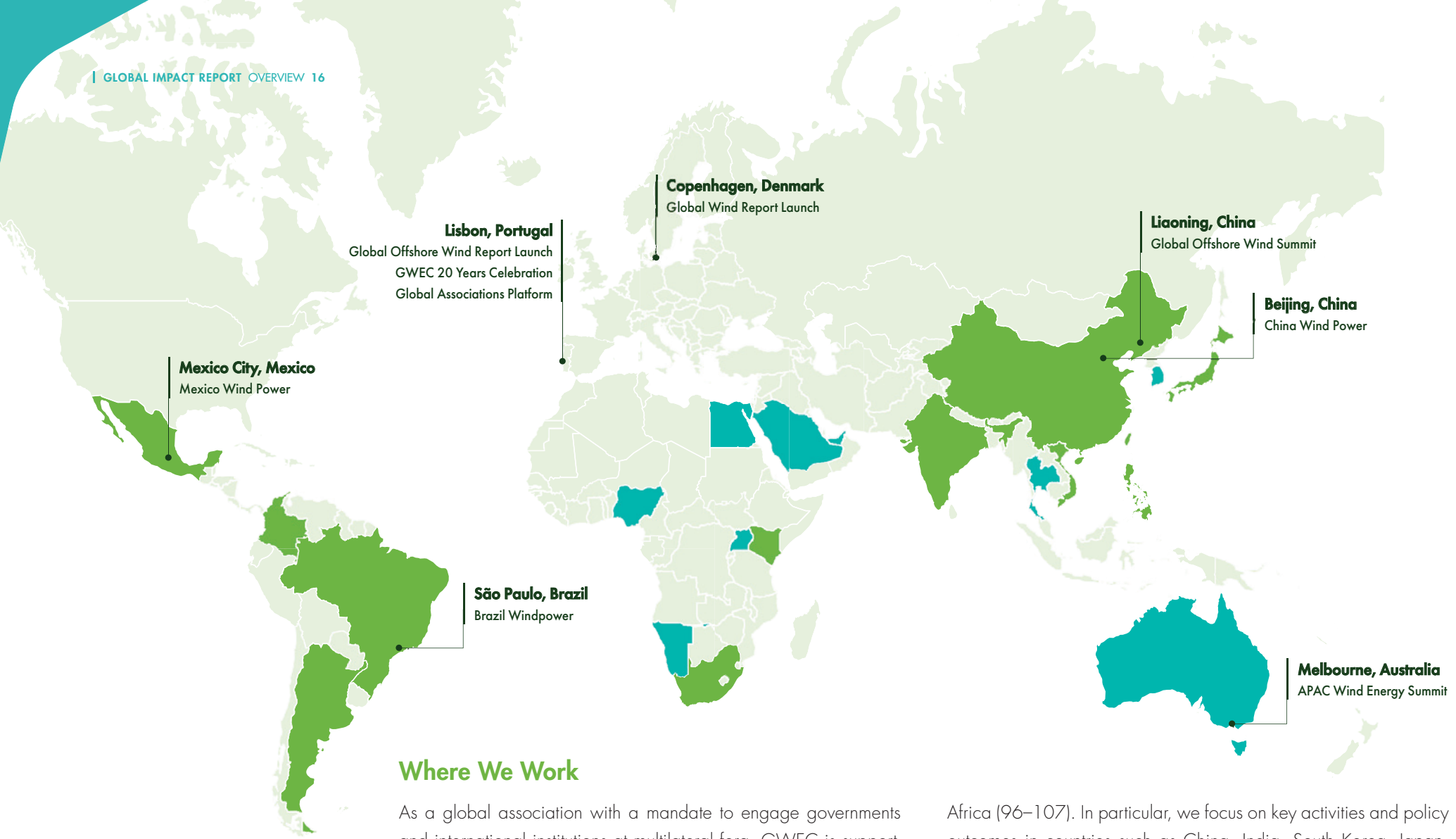
Our team organises global and regional events in partnership with local associations aimed at boosting local industry and supply chain development. Examples include China Wind Power, APAC Wind Summit, Brazil Wind Power, Mexico Wind Power, Argentina Wind Power, Vietnam Wind Power and Colombia Wind Power.

Capacity-Building

We provide resources, training, and networking opportunities for businesses and organisations to develop the skills and knowledge needed to establish local markets. We also facilitate the transfer of skills and technologies between international players and local stakeholders.

GWEC actively engages with stakeholders in developing countries across Latin America, Africa and the Asia-Pacific where wind power holds huge growth potential, as well as in developed economies which are beginning to deploy newer technologies like fixed and floating offshore wind.

GWEC aims to strengthen wind and renewable industry associations in emerging economies, particularly those which serve as key battlegrounds of the energy transition. We believe that enhanced capacity for industry associations on the ground leads to more robust policy and regulatory frameworks, which in turn enable a rapid and sustained increase in wind installations and an expanded pipeline of investment-grade projects.



Where We Work

As a global association with a mandate to engage governments and international institutions at multilateral fora, GWEC is supporting the deployment of wind power around the world. Our policy and advocacy work has been a significant factor in helping to shape regulatory and investment regimes in over 100 countries.

In this report we take a closer look at GWEC's impacts in collaboration with our partners and allies across Asia-Pacific (pages 58 – 81 Latin America and the Caribbean (pages 82–95), and Africa (96–107). In particular, we focus on key activities and policy outcomes in countries such as China, India, South Korea, Japan, Philippines, Vietnam, Brazil, Argentina, Colombia, Mexico, South Africa and Kenya (highlighted on the map in light green).

Other countries identified as priority markets where GWEC is actively engaged are also marked.

Key GWEC-Organised Wind Energy Event Organised

Focus Countries for Key Activities and Policy Developments

Priority markets where GWEC is actively engaged

Building Alliances

Growing a Wind Energy Ecosystem

GWEC has been a driving force behind the creation of innovative new organisations and alliances that are accelerating the growth of wind power.

Advocacy & Strategic Communications:

Industry-led advocacy to governments for onshore and offshore wind.

Business-to-business peer learning.

Industry problem solving.

Representing all players in the supply chain.

GLOBAL WIND ENERGY COUNCIL (GWEC)

GWEC
GLOBAL WIND ENERGY COUNCIL

OCEAN ENERGY PATHWAY (OEP)

Ocean Energy Pathway

Technical Assistance and CSO Engagement:

Uses philanthropic money to expand their ability to deliver technical assistance to governments.

Brings together industry and NGOs to try unlock socio-economic barriers to offshore wind.

Cross-Sector Climate Leadership:

Building strong relationships and visibility across six renewable energy industries and ecosystems to drive the broader RE agenda.

Powerful cross technology, high level advocacy voice at key intuitions.

GLOBAL RENEWABLES ALLIANCE (GRA)

Global Renewables Alliance

GLOBAL OFFSHORE WIND ALLIANCE (GOWA)

GOWA
Global Offshore Wind Alliance

Political & Diplomatic Efforts:

Climate diplomacy and increasing climate ambition on offshore wind, globally.

New multilateral, public-private forum.

GWEC CEO Ben Backwell meets with Selwin Hart, Special Adviser to the UN Secretary-General on Climate Action and Just Transition, alongside Louise Burrows and Bruce Douglas from the GRA

GWEC works with **partner organisations** to drive the growth of the global wind and renewables industry.

From left to right, from top to bottom: 1. GWEC Chair Michael Hannibal supporting a GRA campaign 2. GRA hosting IRENA and industry figures at COP30 3. Navneet Khinda, OEP Global Strategy Director 4. The OEP team with COP30 Energy Envoy Elbia Gannoum 5. EU Energy Commissioner Dan Jørgensen speaking at a GOWA event 6. OEP's Marianella Bolivar Carbonell speaking at an event in Colombia 7. The GRA and GWEC teams meeting EU officials at COP30

Global Offshore Wind Alliance (GOWA)

The Global Offshore Wind Alliance (GOWA) is a global, diplomatic-led initiative dedicated to accelerating the deployment of offshore wind energy worldwide. The alliance was launched in 2022 at COP27 by GWEC, the International Renewable Energy Agency (IRENA) and the Government of Denmark.

GOWA serves as a multilateral and multistakeholder alliance of more than 20 governments, as well as industry, international organisations and civil society, working together to achieve a global target of reaching 2,000 GW in offshore wind by 2050. The alliance facilitates international cooperation and knowledge exchange to accelerate and scale up offshore wind deployment, while supporting the development and sharing of principles, tools and best practices.

Global Renewables Alliance (GRA)

The Global Renewables Alliance unites six leading global industry associations, representing wind, solar, hydropower, green hydrogen, long-duration energy storage, and geothermal. Founded in 2022, the GRA works in close partnership with governments, industry leaders, investors, NGOs, multilateral organisations, and corporations.

The GRA is campaigning to secure at least 11,000 GW of renewables installed worldwide by 2030. It played a pivotal role in achieving a global target to triple renewable energy capacity by 2030, which was endorsed by UN governments in 2023 at COP28.

Ocean Energy Pathway (OEP)

Ocean Energy Pathway accelerates the global clean energy transition by unlocking the immense resource of offshore wind power.

Founded at COP28 in 2023, its mission is to rapidly scale the development of offshore wind globally by 2030, helping to create more than 10 new markets for offshore wind deployment. Through practical, delivery-focused implementation, OEP aims to turn climate ambition into action.

OEP is supported by the Ocean Resilience and Climate Alliance (ORCA), a philanthropic initiative that seeks to identify and fund ocean-climate solutions across mitigation, sequestration, adaptation, and resilience.

Our Journey

20 Years of Progress

In the 20 years since GWEC was founded, global wind capacity has grown more than 20-fold. Total installations are expected to surpass 1,270 GW in 2025, up from 59 GW in 2005.[6]

GWEC was formally constituted on 28 November 2005 by a coalition of companies and associations. That year, installed wind capacity stood at over 59,000 MW, having grown 12-fold since 1995.

It had taken many decades to reach this point. Prototype wind turbines had been developed in the post-World War II period, but it was not until the oil price shocks of the 1970s that wind power began to attract serious attention from alternative energy pioneers and forward-thinking policymakers.

What emerged as a novel if highly innovative industry in the 1970s and 1980s had proven its technical viability and business case by the late 1990s. The world's first offshore windfarm, Vindeby in Denmark, an 11-turbine 450 kW project, was commissioned in 1991.

Playing a pivotal role in championing wind power over this time were national and regional wind energy associations such as the American Wind Energy Association, formed in 1974, the British Wind Energy Association (1978), Danish Wind Industry Association (1981), Chinese Wind Energy Association (1981), and European Wind Energy Association (1982), among others.

As the century drew to a close, these pioneering associations together with an international network of manufacturers, developers and utilities concluded that a global industry required a global champion.

The Global Wind Energy Council (GWEC) was born with a mandate to strengthen the sector's voice in international fora and help emerging economies around the world realise the benefits of wind power.

[6] Based on GWEC Market Intelligence Q3 2025 Global Outlook

Ben Backwell at GWEC's 20th Anniversary Celebration
Lisbon, Portugal, 2025

Founding: A Global Champion for Wind Power

GWEC was established under the legendary chairmanship of Arthouros Zervos, then President of the European Wind Energy Association, at a time when sceptics still claimed that wind power was too expensive and would never be free of public subsidies These sceptics radically underestimated wind's growth potential, and were to be proven wrong over the following years.

GWEC's founding members comprised wind associations from Asia Pacific, Europe, Africa, and North and South America, as well as large corporates in the wind industry such as Vestas and Hansen Transmission (now ZF Wind Power).

"GWEC's mission is to ensure that wind power establishes itself as one of the world's leading energy sources, providing substantial environmental and economic benefits across the world," noted Zervos in a statement marking the association's birth[7].

Svend Sigaard, CEO of Vestas, welcomed GWEC's formation as "a needed credible and representative global voice for the wind industry," adding: "We look forward to the synergies, strategies and solutions that will be created by such a mass of wind experienced individuals and corporations from all over the world."

The GWEC secretariat, led by Bruce Douglas, began operating out of a small office in Brussels, and set out to convince policymakers and financiers in both advanced and emerging economies that wind power could be both economically feasible and competitive with fossil fuels. The association's membership quickly grew to include developers, operators and manufacturers representing most of the world's installed wind power capacity.

Arthouros Zervos
GWEC Founder

Bruce Douglas (centre)
Founding Secretary-General of GWEC at the Council's launch in 2005

Arthouros Zervos
In Sydney for the launch of the Global Wind Energy Council in 2005

[7] Wind Power Monthly April 2005

The Early Years: Setting a Vision for the Future

Soon after its establishment, the GWEC team began collecting and publishing data on world wind capacity whilst building an evidence base of the policy levers that would remove regulatory and investment barriers to greater deployment.

Together with Greenpeace International and the German Aerospace Centre, GWEC published its first Global Wind Energy Outlook in 2006. The model concluded that wind power could feasibly be supplying 17.7% of the world's electricity by 2050 – albeit only if ambitious policy targets were met over subsequent years[8].

GWEC called for legally binding targets for renewable energy to act as a catalyst for governments to develop the necessary regulatory frameworks to expand renewables, including financial frameworks, grid access regulation and planning reforms, as well as action to address distortions in electricity markets, eliminate market barriers and create an attractive investment climate.

In 2007, Steve Sawyer, a renowned environmental campaigner and then head of Greenpeace International, was formally appointed as GWEC's first Secretary-General. Steve would go on to lead and inspire the organisation for over a decade, during which time wind power became one of the world's fast-growing energy technologies.

Steve Sawyer
GWEC Secretary-General from 2007-2018

Steve Sawyer
GWEC Secretary-General from 2007-2018

Steve Sawyer
GWEC Secretary-General from 2007-2018

[8] GWEC Global Wind Energy Outlook 2006

Expanding Wind Power to New Shores

In the early 2000s, European countries, notably Denmark, Germany and Spain, were early adopters of policies and regulatory frameworks such as feed-in tariff support schemes which helped to integrate wind power into national energy markets. Seeking to emulate the success of these policies, GWEC began a global outreach programme to help open new markets outside of Europe and North America.

Working in unison with local renewable energy associations, GWEC began organising technical workshops, study tours and conferences with industry and government stakeholders about technological advances in wind power and the regulatory support schemes that would allow new projects to flourish and attract investment.

GWEC's early interventions in China, Latin America and India were pivotal in broadening awareness of wind's global potential, helping shape the development of new regulatory and auction regimes in markets traditionally dominated by fossil fuels.

In China, GWEC began working with the Chinese Wind Energy Association and the Chinese Renewable Energy Industries Association. In 2006, the Chinese Government introduced feed-in tariffs under the country's first Renewable Energy Law and shortly after, in 2007, GWEC helped establish the first ever China Wind Power conference and exhibition which is now one of the world's largest wind industry events.

In Latin America, with the support of the Spanish Wind Energy Association, GWEC focused its attention on Brazil, Mexico and Uruguay, later expanding to Chile and Argentina. Tours and technical workshops were organised on topics such as market design and system management. In Brazil, following close collaboration between GWEC and the Brazilian Association of Wind Energy (ABEEólica), the government launched its first ever renewable energy auction in 2009.

In India, on the invitation of the Indian Wind Turbine Manufacturers Association, GWEC began actively supporting the development of the country's wind policy and regulatory framework. GWEC became a prominent advocate of developing a national roadmap for offshore wind development, a forerunner of the country's first National Offshore Wind Policy in 2015.

Steve Sawyer
On Greenpeace's Rainbow Warrior
© Greenpeace / Nigel Marple

Greenpeace's Rainbow Warrior

Challenging Conventional Energy

In 2007 the European Union, spurred on by the European Wind Energy Association, introduced its historic 20/20/20 Plan. This was a bold initiative to reduce greenhouse gas emissions by 20% from 1990 levels, improve energy efficiency by 20%, and, crucially, increase the share of renewable energy to 20%.

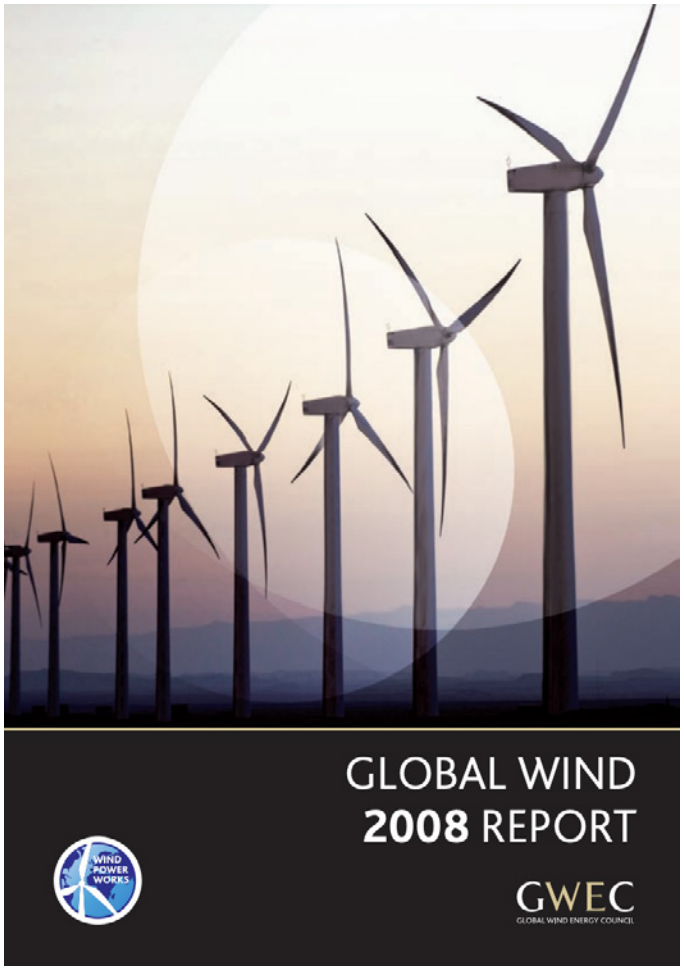
Across advanced markets, wind went from being a niche source of power to one that challenged conventional fossil fuels and nuclear energy. In 2008, the US Department of Energy released a groundbreaking report concluding wind energy could provide 20% of US electricity by 2030[9]. Wind became the biggest source of new power generation in the EU that year, reaching this same milestone in the US in 2012[10].

[9] GWEC Global Wind Report 2008
[10] Wind Power: The Struggle for Control by Ben Backwell

Weathering the Financial Storm

The Global Financial Crisis that began in 2008 was a profound test of the resolve of investors and policymakers to support renewable energy technologies. By early 2009 affordable capital was largely unavailable in most OECD countries with many analysts predicting a sizeable contraction in the renewable energy sector.

However, whilst order books for new turbines took a hit during the first months of the financial crisis, the sector in fact proved to be extremely resilient during this time of crisis. The wind market grew by 41.5% in 2009 over the previous year, as more than 38 GW of new turbines were installed around the world, bringing total capacity to 158.5 GW.



Explaining Wind's Role in Climate Action

Under Steve Sawyer's visionary leadership, the GWEC team geared up for the United Nations Climate Conference (COP15) in Copenhagen in 2009, at a time when governments around the world were looking for a successor to the Kyoto Protocol, the first multilateral agreement to curb carbon emissions.

GWEC led a proposal to the UNFCCC for a Sectoral Crediting Mechanism which would provide a means for industrialising countries to use carbon markets and private finance to decarbonise their power sectors. Our team argued this mechanism could leverage hundreds of billions of dollars for clean energy investment in the developing world and could result in emissions reductions of many hundreds of millions of tonnes[11].

Seeking to rally wider public support behind wind energy, GWEC launched a global campaign entitled 'Wind Power Works'[12]. The campaign was backed by leading companies and helped to promote wind as a key part of the solution to climate change. It also marked the first time the wind sector had a unified, strong presence at the COP.

Working with the European Wind Energy Association, GWEC also established Global Wind Day on 15 June 2009 – an event which has become bigger and more influential every year since, helping to celebrate the sector's successes and propel wind power into the mainstream.

While the Copenhagen summit in 2009 ultimately failed, the immediate negative impact this had on investor confidence in renewables was short-lived. Between 2010 and 2020, global wind capacity nearly quadrupled from around 200 GW to over 740 GW.

GWEC continued focusing its advocacy around wind power's role in climate mitigation. This expanded role involved engaging the International Energy Agency (IEA) and, later, the newly established International Renewable Energy Agency (IRENA).

Six years after Copenhagen, the landmark Paris Agreement , adopted by 186 governments in 2015, was a seismic moment for the global renewables sector, committing countries to a global goal of limiting the global temperature rise to 1.5°C by the end of this century.

Annual installations topped a record 63 GW in 2015, with wind power supplying more new power generation than any other technology according to the IEA[13]. China led the way with 30.8 GW of new installed capacity, once again breaking the record it had set the previous year.

[11] GWEC Global Wind Report 2008
[12] GWEC Global Wind Report 2008
[13] GWEC Global Wind Report 2015

New Milestones as Growth Continued

As the size of GWEC's team grew, so did its ambition and influence across the globe, leading to an expansion of its partnerships with international, regional and national stakeholders in the energy transition.

By 2017, as wind developers expanded their reach and penetration into new markets around the world, global wind capacity hit the historic 500 GW milestone. That year, Kenya's Lake Turkana Wind Farm, the largest wind farm in Africa, was completed, helping to showcase wind power's potential across the Global South.

Seeking to lay out a roadmap for the development of a global offshore wind sector, GWEC for example took part in the pioneering Facilitating Offshore Wind in India (FOWIND) consortium, a four-year project with India's Ministry of New and Renewable Energy (MNRE), co-financed by the European Union, which in 2018 presented a concept for the sector's future growth.

By the end of the decade, the price of wind power had fallen further, driven by supply chain efficiencies, technological innovation and the increasing size and scale of new projects, and wind was the most competitive source of new power along with solar PV, in most power markets around the world.

In 2019, the UK's record-breaking 1.2 GW Hornsea I wind farm was completed under the UK's pioneering Contracts for Difference (CfD) auction system. It was the first time any offshore wind project had exceeded an installed capacity of 1 GW and was a bold demonstration to other countries around the world of the success of the CfD as a mechanism for accelerating growth in wind power.

In 2016, a GWEC delegation led by Secretary-General Steve Sawyer met with Argentinian Energy Minister Juan José Aranguren in Buenos Aires kickstarting a three-year boom in that country's wind market[14].

[14] GWEC Global Wind Report 2016

Scaling Up GWEC's Operations and Reach

Visionary wind sector strategist Ben Backwell succeeded Steve Sawyer in 2018, beginning a new chapter in the association's history. Under Ben's leadership and with the support of the organisation's membership, GWEC has since expanded steadily and strengthened its influence and programme of activities, creating new opportunities to grow wind's share of the global electricity mix.

At this time, wind market dynamics were changing and evolving as many industry players had revised their business models and strategies by acquiring new subsidiaries or expanding their services offered. Meanwhile, the volume of corporate sourcing or corporate Power Purchase Agreements (PPAs) had markedly increased, reflecting growing demand for large-scale sources of clean energy[15].

Under Ben's leadership, GWEC quickly established a series of industry task forces – covering Asia, Latin America and Africa as well as a specialist offshore wind industry group – bringing together leading developers, investors, manufacturers and local associations. These taskforces, made up of forward-thinking industry advocates, have helped to provide governments with clear guidance on the best regulatory and technical frameworks for attracting investment, whilst facilitating cross-border knowledge exchange and helping to shape GWEC's public awareness campaigns.

Recognising Asia's role as the principal growth engine for the wind industry, Ben established GWEC Asia as the key regional growth centre for the organisation. From the beginning Ben put achieving gender equity and diversity at the heart of GWEC's mission, establishing the Women in Wind Leadership Programme with Joyce Lee in 2019.

GWEC also launched a new Market Intelligence function which greatly expanded the organisation's global data gathering and analysis capabilities, bringing together inputs from local wind associations, governmental statistics, available project information and inputs from industry experts and GWEC members.

[15] GWEC Global Wind Report 2016

Ben Backwell, GWEC CEO at COP29
Baku, Azerbaijan

The GWEC and GRA delegation meeting with Indian officials at COP29
Baku, Azerbaijan

From 2020: Charting a Course for the Next Era of Growth

2020 proved to be the best year so far for global wind installations, with GWEC recording more than 93 GW – up 53% on the prior year thanks to record onshore installations in Asia Pacific, North America and Latin America[16].

This new decade however brought much change and uncertainty to global energy geopolitics, with the devastating impact of the Covid-19 pandemic and Russia's invasion of Ukraine reflected in volatile energy prices, deeper supply chain constraints, rising interest rates, increased cost of capital and a sharpened public focus on energy security.

Amid these challenges, confidence in the wind sector to deliver large-scale clean power for economic growth and carbon reductions has continued unabated. More governments have adopted ever more ambitious targets to reduce carbon emissions to net zero. In 2019, the UK was the first country to make achieving net zero by 2050 a legal commitment, and a year later China announced a goal to reach carbon neutrality before 2060. By late 2025, 140 countries had committed to a net zero target.

In 2022, GWEC led the establishment of the Global Renewables Alliance (GRA), a powerful global trade body formed from the leading industry associations for wind, solar, hydropower, geothermal, long-duration energy storage and green hydrogen, to push for greater global ambition on renewables and stronger action to remove obstacles to deployment.

GWEC also worked with partners to found sister organisations to share practical policy solutions to scale offshore wind deployment: the Global Offshore Wind Alliance (GOWA) with partners IRENA and the Government of Denmark and a further 26 government members as of 2025; as well as Ocean Energy Pathway (OEP), an independent non-profit providing technical assistance to governments.

[16] GWEC Global Wind Report 2021

The heads of the wind, solar, storage, hydro and green hydrogen trade bodies at the founding of the Global Renewables Alliance
COP27, Egypt

GWEC has supported dozens of government delegations at COPs since becoming an official observer at COP26
COP26, United Kingdom

Accelerating the Global Energy Transition

In 2023, the wind sector passed the historic 1 TW of installed wind capacity milestone, as global annual installations surpassed 100 GW for the first time.

This was the culmination of decades of hard work, innovation and determination by the industry's early pioneers, whose enthusiasm for wind power was met with practical support from government in creating regulatory frameworks, which in turn incentivised investment from business leaders around the world.

Ever more sure of the wind sector's ability to expand further and deeper into national energy systems, government leaders at COP28 in Dubai pledged to triple global renewable energy capacity by 2030 – a commitment secured in large part due to the campaigning by the GRA.

Growth of wind energy between 2025 and 2030 is projected to achieve a compound annual growth rate of 8.8%, according to GWEC, and with the right policies and economic conditions in place GWEC believes the wind industry can potentially triple growth to 320 GW.

Whether the world will achieve this target is by no means certain. It will depend on whether GWEC and its allies can focus global attention on serious barriers to the wind sector's growth – stabilising project revenue and supply chain costs, securing availability of capital, speeding up permitting, scaling up grid investments, and tackling disinformation by opponents of renewable energy.

"To meet the tripling goal, governments must set ambitious, specific and actionable national clean energy plans and back them up with supporting regulation to reignite investor confidence," noted GWEC CEO Ben Backwell in January 2025, following his appointment as Chair of the Global Renewables Alliance. "The private sector stands ready to work with policymakers to speed up implementation and deliver action to meet government ambition."

In the next sections of this report, we provide a closer look at GWEC's areas of work, key activities and achievements.

Wangari Muchiri
Winning a Wind Energy Pioneer Award at the 1 Terawatt Party at The Conduit, London - 2023

Renewable association heads backing the successful 'Triple Up, Double Down' campaign
COP 28, United Arab Emirates

03 HOW WE DELIVER

How We Deliver

Policy and Advocacy

The global expansion of wind power over recent decades has been made possible by the development of national, regional and international targets, policies and regulatory frameworks that have promoted investment into renewable energy projects.

Today wind power makes up around 8% of global electricity generation – equivalent to powering 500 million homes. Wind is seen by policymakers as a technology of choice to diversify energy markets, not least because of its cost-competitiveness and ability to lower consumers' energy bills over the long-term.

Looking ahead to a carbon-neutral future, wind is increasingly recognised as an anchor technology for a clean, secure and resilient energy system.

GWEC has been at the forefront of the wind industry's efforts to engage governments, multilateral organisations, financial institutions and civil society to exchange knowledge and best practices about how to build a supportive policy and regulatory environment for wind power projects.

GWEC is driving initiatives in offshore wind through the Global Offshore Wind Alliance, together with IRENA, the Danish Government and 26 national and sub-national governments.

Ben Backwell at High-level GOWA Roundtable
APAC Wind Energy Summit 2024

Our advocacy strategy

GWEC's approach to global stakeholder engagement recognises and responds to the challenges and growth opportunities facing wind energy across the world.

Our policy and advocacy strategy involves showcasing the clear benefits of backing wind power, and engaging directly with key stakeholders across global, regional and national spheres. To this end, we communicate the positive economic, social and environmental impacts associated with wind energy and its role in the energy transition.

By advancing the wind sector's enormous role in reducing global carbon emissions, we are complementing the wider efforts of NGOs and philanthropic organisations focused around renewable energy's role in climate action.

Strategic priorities

GWEC's policy and advocacy strategy is centred around supporting the global goal to triple renewable energy by 2030, a major outcome of the COP28 summit in 2023, by accelerating the growth of wind around the world.

Our strategic priorities for 2025-2030 are focused on:

1. Enabling the global growth of wind through unlocking policy and regulatory barriers.

2. Convening the wind industry to collectively align on identifying shared challenges and solutions necessary for securing long-term sustainable growth.

3. Driving the global growth of onshore and offshore wind, by facilitating key growth markets for onshore wind and driving important next-stage markets, and by putting offshore wind back on the front foot.

4. Unlocking wider and deeper partnerships to grow demand and align industry.

Unlocking barriers to deployment

While wind energy continues to grow at a record pace around the world, it is not yet growing nearly quickly enough to ensure a successful, orderly energy transition and the achievement of global carbon targets.

The sector has faced strong macroeconomic headwinds since the Covid-19 pandemic linked to high inflation and interest rates, supply chain bottlenecks and the rising cost of capital. At the same time, a set of longer-term barriers and risks related to the wider energy transition continue to inhibit the sector's advancement.

Continued and sustained growth in wind energy will rely on governments and international institutions advancing policies and regulations that unlock these enablers of development:

Accelerated permitting

Proactive investment in grids and storage

A secure and resilient supply chain

Fair and open trade

High ESG standards across the value chain

Promoting trust in wind energy

FRAMEWORK

CHARTING A ROUTE TO MARKET FOR OFFSHORE WIND

In fast-growing regions of the world like Asia Pacific (APAC), GWEC has promoted a Route to Market framework to guide policy development for offshore wind. This framework adopts a structured and market-tested approach to offshore wind energy growth, given many governments of countries with high offshore wind potential have less exposure and experience with the sector.

Spanning policy, regulatory, technical, infrastructural and financial aspects of energy sector development, this framework provides governments with a model for developing a thriving wind energy sector and value chain.

01 SECTORAL TARGET SETTING

Include target in the Energy Development Plan

- **High-level government advocate**
- **Mid-level government advocate**

02 ROUTE TO MARKET

Policy framework to ensuring a clear pathway from development to Commercial Operation Date

- **Planning:** Marine Spatial Planning (MSP), electricity plan, among others.
- **Leasing:** Auction for the seabed lease allocation.
- **Permitting:** Streamline permitting process to reduce complexity and timelines.
- **Offtake Mechanism:** Feed-in-Tariff (FiT), Action and Corporate PPPA (CPPA).

03 ENABLERS

Tackling constraints to the technology deployment

- **Finance:** Scaling up finance and improving bankability.
- **Supply Chain**
- **Workforce**
- **Infrastructure:** Grid; Ports.
- **Beyond Finance:** Carbon Market.

04 GUARDRAIL POLICIES

Crucial policies affecting technology deployment: Environmental, ecological and socio-economic factors

- **Environmental and Ecology:** EIA processes MSP guidance
- **Social Engagements:** Permits related to community engagement; Fishery and other local community engagements.

This framework has been successfully applied in various countries in APAC, as discussed on pages 58-81. It is designed to be a replicable model that can be adopted for the policy, regulatory, technical infrastructural and financial needs of any country beginning to explore offshore wind as a renewable energy source.

Accelerating Permitting

Context

Permitting remains a major source of delay in most markets around the world, from Italy to India, adding complexity, uncertainty, increasing project development costs and reducing the confidence of investors.

In some countries, nearly a decade of lead time is required to develop a wind project. In the European Union alone, there are five times more projects waiting to receive permits than under construction.

This is a near universal challenge which must be ad dressed in every market to rapidly accelerate renewable energy deployment.

Solution

When permitting and planning processes are well-designed and efficiently managed, wind energy projects deliver lasting economic and social benefits to surrounding communities.

Ensuring clear, predictable approval timelines can reinforce the business confidence created by transparent auction frameworks.This helps to attract long-term investment and signal an openness and commitment to a stable regulatory environment.

The Covid-19 experience showed that robust physical and digital processing infrastructure can be assembled in an emergency to reorganise governing procedures and supply chains in line with national interests. Amid current energy security and climate crises, the same urgency needs to be applied to renewable energy projects and enabling infrastructure.

Our Action

GWEC's policy and advocacy initiatives on permitting are focused around encouraging governments to accelerate the permitting process while ensuring thorough due diligence and meaningful community engagement. We believe this can be facilitated by streamlining all permitting through a single authority with clear statutory timelines, reducing bureaucratic bottlenecks and inter-agency overlap.

In September 2023, GWEC together with IRENA published a landmark report, Enabling Frameworks for Offshore Wind Scale Up: Innovations in Permitting, setting out best practice proposals for offshore wind developers and policymakers.

During 2024 and 2025, GWEC has been working with government, industry and civil society stakeholders to improve permitting processes and boost investor confidence in La Guajira, Colombia – one of the key regions for the country's shift from fossil fuels to renewables. This work included convening the regional industry around a policy paper in November 2024 on Ensuring the Social License for Wind Projects in Latin America.

Recognising the importance of gaining community acceptance – a 'social licence' – through the permitting process, GWEC has also worked with national associations and other stakeholders to publish policy guidance detailing how governments and developers can work together to improve the well-being of local communities.

GWEC's Key Recommendations for Permitting

Set Clear Milestones and Provide Better Visibility

Governments should set clear permitting milestones for auctions by enacting deployment mandates and roadmaps, giving industry long-term visibility on the potential size of project pipelines and timelines for deployment.

Centralise Permitting to Streamline Decision-Making

Governments should centralise all permitting under one authority to establish maximum review durations and reduce inter-agency fragmentation.

Treat Major Wind Projects as Essential Infrastructure

Policymakers should embed the overriding public interest for wind energy projects in national law.

Prioritise Stakeholder Engagement

Developers should facilitate early and sensitive stakeholder engagement with local communities and environmental groups to mitigate any risk of conflicts that may delay projects.

Accelerating Investment in Grids and Storage

Context

Electricity grids are becoming the defining bottleneck of the energy transition. Without rapid expansion and modernisation of transmission and distribution networks, the world cannot achieve its 2030 renewable energy and climate targets.

Grid connection queues have reached record levels globally, interconnection projects face multi-year delays, and investment in transmission networks lags far behind the surge in renewable capacity.

These challenges are particularly acute in Emerging Markets and Developing Economies (EMDEs), where limited infrastructure and regulatory barriers hinder both domestic renewable deployment and regional power trading.

Solution

By 2030 the world needs a six-fold increase in energy storage capacity, with 1.5 TW required to keep the world on track for net zero.

Scaling up investment into secure, smart and flexible grids will require stronger coordination among system operators, regulators, utilities and industry to conduct long-term forward-planning on grid expansion and reinforcement, the creation of regional markets for power export and trading, and to ensure cyber security.

01 GLOBAL FRAMEWORK

Defines key grid challenges & global solutions to guide the energy transition

- **Electricity markets & pricing signals**
- **Flexibility:** Storage, demand-side, hybrid plants
- **Permitting & Planning:** Streamlining, RE zones
- **Investment & financing:** Blended finance, PPPs
- **Supply chains and workforce**
- **Regulation & Grid Codes**
- **Cross-border interconnection**

02 REGIONAL & COUNTRY ADAPTATION

Adapting global solutions to regional contexts and national priorities

- **EMDEs:** Concessional finance, capacity building
- **Developed Markets:** Permitting bottlenecks, fllexibility reforms
- **Regional Grids:** Trust, cost-sharing, harmonized rules
- **Tailored Advocacy:** Aligning with national energy strategies and just transition priorities

03 FROM KNOWLEDGE TO IMPLEMENTATION

Connecting global best practices with local institutions to drive reform

- **Advocacy & communications tools**
- **Policy-focused technical assistance & knowledge transfer**
- **Stakeholder mapping:** TSOs, regulators, MDBs, ministries, investors
- **Convening dialogue across sectors**

04 OUTCOMES

Accelerated renewable integration through modernized grids

- **Shorter permitting timelines & reduced queues**
- **Scaled investment flows**
- **Resilient supply chains & skilled workforce**
- **Stronger system reliability & flexibility**
- **Enhanced regional cooperation & interconnection**

Our Action

GWEC's approach on grids combines technical expertise with high-level advocacy: mapping investment needs, identifying regulatory and financial barriers, and coordinating a coalition of governments, industry, and institutions to accelerate action.

At the regional and national level, GWEC engages with system operators and regulators, as well as multilateral development banks and investors to promote dialogue and collaboration.

Regional cooperation is a central focus for our work, as we engage regional power pools and governments to promote cost-sharing and harmonised rules for transnational grids. We also support EMDEs through advocacy on concessional finance, capacity building and prioritisation of the just transition.

Through this comprehensive approach, GWEC is helping reframe grids from being a major constraint to a central enabler of the clean energy transition.

GWEC's Key Recommendations for Grids

Significantly Scale up Investment

Governments and system operators should dramatically increase the resources available for the planning, construction and modernisation of secure, smart and flexible grids.

Embrace Innovative Location Solutions

Grid planners and regulators should allow for innovative models for buildout, including the co-location of end-users with renewable developments and creating multi-linked wind hubs and offshore wind energy islands connected to several markets or price zones.

Review Grid Connection Lead Times

Lead times for grid connection decisions should be reviewed and reduced, enabling adequate and anticipatory investment from public and private sectors and multilateral institutions, and speeding up the development process for wind projects.

Seek to Minimise Grid Gongestion

Developers should facilitate early and sensitive stakeholder engagement with local communities and environmental groups to mitigate any risk of conflicts that may delay projects.

Strengthening Global Supply Chains

Context

For the wind industry to thrive, a robust supply chain is required to deliver large, steady and visible volumes of turbines for deployment.

The wind industry supply chain is highly globalised, involving the sourcing of raw materials and critical minerals such as steel, concrete, copper, aluminum, fiberglass, rare earths and other materials, and the manufacturing, transportation and assembly of blades, towers, nacelles and other key components across multiple countries.

In recent years, wind companies have faced mounting pressure from rising commodity prices, high inflation and interest rates and persistent logistical bottlenecks. These challenges, tied to volatility in global power prices and an uncertain policy environment, have meant that industry often does not have sufficient confidence to invest in new markets and manufacturing facilities.

While some governments are seeking to diversify and secure renewable energy supply chains to avoid dependence on other countries and mitigate scarcity risk, these approaches can result in protectionist policies that drive up the cost of wind power and slow deployment, if not carefully managed.

Solution

To meet national, regional and international climate goals, the wind supply chain will need to significantly scale up. Diversifying the supply chain is necessary to grow capacity across different regions and increase global resilience.

As well as maintaining global supply hubs for key components, promoting greater regionalisation in the value chain will help to support long-term growth and reduce high concentration risk in critical areas like gearboxes, generators, and power converters.

Our Action

GWEC has led the way in gathering and publishing data and research on the state of the wind supply chain. This research provides the basis for our recommendations to governments and industry on the policy measures and practical actions that will help increase the rapid deployment of both onshore and offshore wind farms.

In December 2023, GWEC published a landmark report with Boston Consulting Group, entitled, Mission Critical: Building the Global Wind Energy Supply Chain. The report assessed the implications for energy transition policy and the supply chain across four macroeconomic scenarios by 2030. This report has been followed by regional supply chain mapping exercises in APAC and Latin America, showcasing the supply gaps and value creation opportunities for countries in those regions.

Through GWEC's Supply Chain Forums, we have been leading a global initiative to promote dialogue and knowledge exchange, bringing together manufacturers and developers to discuss challenges and opportunities to strengthen international, regional and national value chains.

GWEC's Key Recommendations for Supply Chains

Diversify the Supply Chain for Resilience

Diversifying the supply chain will help to reduce concentration risk and increase global resilience in critical areas.

Standardise Wind Turbine Designs

Standardising wind turbine designs to be more modular and scalable will enable economies of scale, extend equipment use, and improve integration.

Strengthen Local Supply Chains Through Policy

Policymakers should implement pre-qualification criteria to align supply chain actors with international protocols, enhancing local resilience and quality.

Improve Regionalisation and Global Links for Sustainable Growth

GWEC believes supply chain regionalisation is essential for long-term growth and resilience, while maintaining global supply hubs.

Expand International Supply Chains for a Just Transition

This will allow international suppliers to expand into markets outside their home region, promoting global knowledge transfer and accelerating a just transition without compromising supply chain resilience.

Coordinate Regional Industrial Policies for Sustainable Growth

By leveraging respective competitive advantages in a coordinated manner, it is possible to share economies of scale, pool financial and human resources, and generate sufficient market demand to accelerate technological and energy transitions.

GWEC's Multi-Level Approach for Securing the Global Wind Supply Chain

GWEC is engaged across global, regional and national levels to build an enabling environment for supply chain enablement and industrial policy for the expansion of wind power.

Our supply chain initiative is built around three pillars:

A multi-level approach to secure the wind supply chain

At the global level, the supply chain needs to align with **ambitious, practical and robust ESG standards** to ensure that wind energy can support a just and equitable transition, and that the industry safeguards its "licence to operate" as it expands. Multilateral institutions must recognise global RE supply chains as a priority area for cooperation, especially in the areas of **international trade and the growing use of industrial policy, workforce and critical minerals.**

Analysis shows that regional, integrated supply chains are the most efficient model to scale up wind growth and keep costs low. Reshoring/decoupling and diversification of the supply chain should target the least resilient (most highly concentrated) segments, and avoid increasing costs and delays in the transition. But there is a **lack of data, understanding and political buy-in** for regional supply chain collaboration, and a rising trend of **countries applying protective industrial policy to the energy sector** for economic security aims.

Wind power is a source of massive capital investment, creating multiplier effects in sustainable employment opportunities and industrial growth. **National roadmaps for developing local supply chains and a skilled workforce** in the wind sector can drive greater ambition for wind and renewables, and showcase the long-term net gains for countries in the energy transition.

GWEC Supply Chain Initiatives in 2025

- Supply Chain Forum for Developers in February 2025
- Industry Perspective on Localization Paper published in March 2025
- Industrialiation Workshop with BCG in April 2025
- Floating Offshore Wind Accelerator Forum in September 2025
- APAC Industrial Policy Paper published in September 2025
- Latin America Supply Chain Study published at COP30 in November 2025
- Japan Offshore Wind Supply Chain Study published at COP30 in November 2025

Stewart Mullin, GWEC Chief Industry Officer,
Presenting GWEC's supply chain work at the BNEF Summit in London

Fostering Fair and Open Trade

Context

Unnecessary trade frictions serve to heighten the risks associated with project development and ultimately impact the wind sector's ability to achieve shared goals related to climate action, energy security and a just transition.

Increasing protectionism involving governments and international institutions introducing tariff and non-tariff barriers related to vital components for wind power projects risks significant disruption to global supply chains, pushing higher costs onto end-users.

Solution

Keeping trade open is vital for expanding global wind capacity. A fair international trade framework can help to drive down costs, boost cost-competitiveness, facilitate technological innovation and adoption, and ensure a steady supply of renewable energy technologies.

At the same time, trade policies can and should be designed in ways that address unfair market practices and trade restrictions, while supporting local competitive industries and avoiding raising costs for offtakers and consumers.

Ultimately, countries that embrace an open and fair competitive trading environment are better able to source the vital goods and services required to strengthen their domestic energy sector within the ambitious timeframes required to meet national climate and energy targets.

Our Action

GWEC has used its global platform to urge governments and regional institutions to achieve open and fair global trade through bilateral and multilateral mechanisms that support a level playing field. We have called for global leaders to adopt trade-friendly green industrialisation policies which re-globalise renewable energy markets.

In December 2023, GWEC together with Boston Consulting Group published an extensive analysis of the global wind supply chain, showing that global scenarios involving heightened protectionism, restrictive trade regimes and distorted forms of competition will likely result in slower wind market growth, higher wind energy costs and worse financial sustainability for wind power suppliers.

In April 2024, GWEC and its members published a global statement on fostering a fair, open, and transparent trade environment for global wind energy.

GWEC's Key Recommendations to Support Open and Fair Trade

Embrace Multilateral Trade Mechanisms	Governments should engage in constructive dialogue and evidence-based negotiation in bilateral and multilateral fora to resolve competition issues, rather than resorting to unilateral measures.
Listen to Industry When Negotiating Trade Policy	Renewable energy industries should be able to contribute to trade negotiations on renewable energy goods and services, leveraging their expertise and outlook.
Avoid Harmful Trade Restrictions	Unjustified restrictions on international trade, which would disproportionately affect emerging markets and developing countries and undermine a just global energy transition, should be opposed.
There Should be a Level Playing Field	Unfair or distortive market practices that harm market actors should be investigated with appropriate action by relevant authorities.

Embedding Sustainability and Good Practices

Context

At present, the global wind industry lacks a harmonised international standard for traceability and environmental, social and governance (ESG) assurance.

While there exists an architecture of widely accepted technical standards, different Original Equipment Manufacturers (OEMs), developers and investors apply their own standards and benchmarks to procurement. This causes inconsistencies that complicate supply chain management and create challenges in maintaining quality and compliance across projects, increasing risks and costs for companies, investors and stakeholders.

Solution

Ensuring the global wind energy supply chain can scale up to meet global targets in a way that is resilient, sustainable, inclusive and transparent, will require close cooperation across regions and countries and the establishment of internationally accepted best-in-class practices.

Establishing a unified approach to harmonising international sustainability standards is essential to ensuring appropriate ESG standards across the industry. This should streamline the adoption of standards processes, reduce risk and costs, increase social acceptance and foster sustainable growth in the wind energy sector. Creating these common standards is an essential part of creating a level playing field for wind industry companies.

Our Action

GWEC has initiated a Wind Sustainability Initiative (WSI) to create an international framework for third-party auditing and certification of wind power.

One of the aims of the initiative is to streamline due diligence processes for procurement of, and investment into, wind projects. This is particularly important in the Global South and other emerging markets where multilateral institution investment and support processes can be complex and lengthy.

Shortening the pathway for project facilitation and supply chain due diligence will accelerate the project development lifecycle and grow the pipeline of wind projects available for investment, enabling more projects to be deployed over the long-term.

The WSI should also contribute to levelling the playing field between markets by establishing a common sustainability benchmark. This would ensure that all manufacturers, regardless of their region, are assessed against the same transparent and credible criteria, fostering fair competition and greater trust across global supply chains.

GWEC is working with a range of organisations across the global wind industry, leading finance institutions and civil society to promote harmonised environmental, social and governance (ESG) and traceability standards, whilst also recognising sector-specific needs. The WSI upholds multi-stakeholder governance and collaboration, with contributors to the standards reflecting a global footprint and a proven focus on environmental preservation and human rights in the clean energy value chain.

In November 2025, for example, GWEC signed a memorandum of understanding with the Solar Stewardship Initiative to exchange knowledge on driving sustainability, transparency and resilience across solar and wind supply chains.

Tackling Disinformation

Context

Climate change denial has been rampant for years. However, the most common contemporary disinformation campaigns are focused on seeking to undermine confidence in climate solutions such as renewable energy in order to slow down the energy transition. Wind power, a crucial climate change mitigation solution, is especially under attack.

Research shows that a significant percentage of populations around the world, particularly those in countries with higher wind energy penetration, believe falsehoods that have no scientific basis. False and debunked narratives about wind energy include claims that wind farms are killing whales, causing cancer, creating energy blackouts, leading to droughts, and emitting more carbon emissions than they save.

Whereas misinformation is the propagation of false information without malicious and deliberate motivation, disinformation is the concerted and deliberate effort to spread false news and inaccurate or compromised information to the general public and local wind energy stakeholders. It serves to introduce bias, increase opposition and undermine developments.

Disinformation and misinformation about wind energy is further perpetuated and reinforced by prominent politicians and political parties. A Brown University study found 441 misleading claims in six months of US Congressional discourse, often echoing anti-wind narratives.

Solution

The wind industry needs to build a global network of allies across global institutions, national and local government and communities to collectively counter misinformation and disinformation.

To fully understand the scale of the problem, GWEC believes disinformation narratives, trends, actors and risks, from the global level to the project level, should be systematically tracked. Insights from this monitoring should be used to inform sector-wide initiatives to address falsehoods head-on.

GWEC CEO Ben Backwell speaking at an event on Climate Disinformation
Conduit Club, London

Our Action

GWEC aims to take a proactive approach to build trust and understanding among communities and key stakeholders about the reality of wind energy development.

Our team is tracking instances of disinformation across its global network, monitoring their influence in the media and the potential impacts on renewable energy deployment around the world.

In May 2024, GWEC held its first-ever Wind Energy and Disinformation Summit at Wilton Park in the UK, gathering key stakeholders from across the world to understand, align and mobilise action on this growing challenge for the industry.

Summit participants included leading global wind energy developers particularly active in disinformation 'hot spots' in the US and Australia, environmental/biodiversity NGOs, think tanks, academic research units, journalists, climate activists, government representatives and philanthropic funders.

In June 2025, GWEC convened the Global Associations Platform Summit, bringing together national and regional wind energy associations to develop communications strategies to address misinformation and disinformation impacting project development.

In November 2025, at COP30, in Brazil, GWEC supported a landmark global Declaration on Information Integrity on Climate Change, establishing international commitments to combat misinformation and promote accurate information about climate change.

Moving ahead, GWEC is seeking to promote greater collaboration between the industry and its allies, while identifying necessary interventions to counter misinformation and disinformation.

GWEC will continue to work with journalists, content platforms, governments and our members and partners to counter disinformation and ensure that the facts about wind power are understood.

Information and Education

GWEC produces research and analysis bringing industry knowledge to the public and specialist audiences.

We showcase and evidence the progress of wind energy technologies, companies and projects. We do this by collecting and sharing data, real-life examples, case studies and perspectives from across GWEC's diverse membership.

These information resources help to tell wind power's story: one of success, innovation and growing opportunity.

Publications

GWEC regularly publishes reports, policy papers, country profiles and deep-dives on key aspects of the wind power market. Since 2020, GWEC has published around 50 publications and special reports, helping to educate and enlighten readers from around the world.

GWEC Market Intelligence

An essential source of information about significant trends and developments in the wind power sector, GWEC Market Intelligence offers unparalleled insights for decision-makers and researchers about the current and future market outlook.

FLAGSHIP REPORTS

Global Wind Report

The Global Wind Report is the wind industry's definitive publication, providing a comprehensive overview of the wind sector's perfomance. It tracks key trends shaping the sector and provides statistics on global wind capacity and annual additions across all regions and markets.

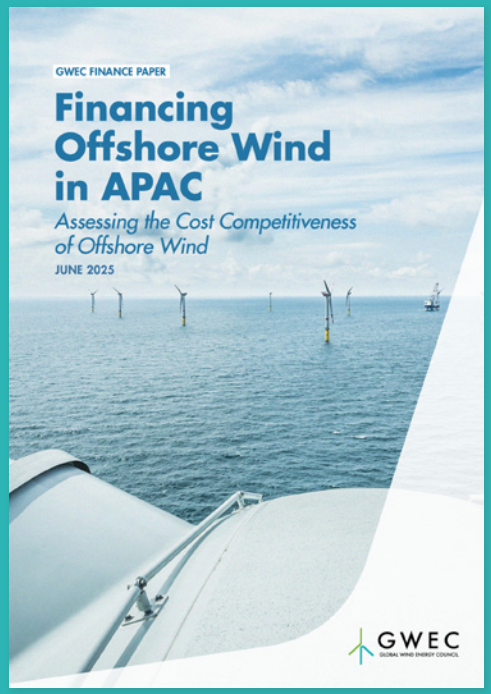
The 2025 edition of the Global Wind Report showed that 2024 was a record year for new capacity additions, with 117 GW of wind energy installed across the world. Despite this progress, the report flagged that the lion's share of installations were taking place in a small number of mature markets, including China and Europe.

Global Offshore Wind Report

The Global Offshore Wind Report, sister publication to GWEC's flagship Global Wind Report, provides an authoritative account of the growth and development of fixed-bottom and floating offshore wind around the world.

The 2025 edition of the Global Offshore Wind Report, published in June, reported that global installed offshore wind capacity reached 83 GW in 2024, enough to power 73 million households. GWEC's short-term outlook was 24% lower than the previous year's forecast, however, due to a negative policy environment in the US and auction design failures in the UK and Denmark.

2025 POLICY PAPERS



Financing Offshore Wind in APAC: Assessing the Cost Competitiveness of Offshore Wind

This GWEC paper explores the factors influencing the levelised cost of electricity (LCOE) for offshore wind projects across APAC, drawing comparisons with mature markets like the UK, Germany and China.

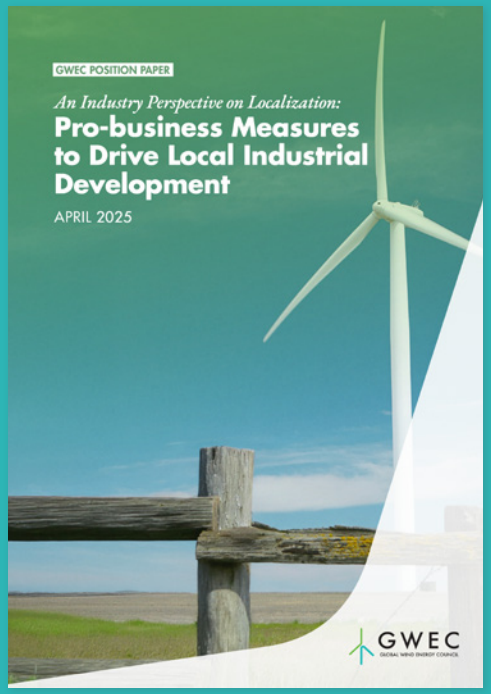
Financing the Offshore Wind Revolution: Risk-Sharing Mechanisms for a Sustainable Energy Future in the Philippines

This finance paper lays out a landmark risk analysis for offshore development in the Philippines, focusing on how policy, contract design, and tariff structures can unlock long-term investment.

Building Offshore Wind Economies in Asia Pacific: Strategic Pathways for Industrial Growth

This policy paper sets out a comprehensive framework for industrial policy in offshore wind in APAC, drawing on lessons from nearly four decades of global development.

2025 POLICY PAPERS



An Industry Perspective on Localization

This industry paper from GWEC calls for market-friendly localisation strategies, moving beyond restrictive Local Content Requirements to accelerate global wind supply chain growth.

Women in Wind: 5-Year Impact Evaluation Report

GWEC launched Women in Wind in 2019 to empower women and strengthen the diversity of the workforce. This independent impact evaluation concluded the initiative has made 'a profound impact in the lives of programme participants".

"Reports by GWEC play an important role in guiding stakeholders as we work together to position India as a global clean energy leader."

- Shri Pralhad Joshi,
India's Minister for New & Renewable Energy on GWEC's 2025 India Wind Energy Outlook

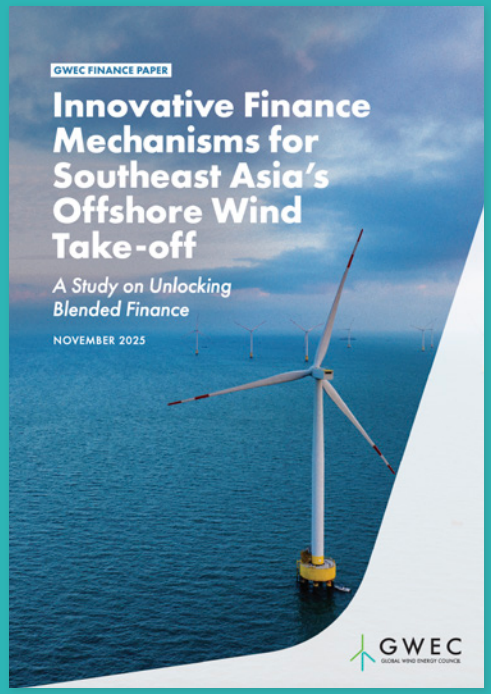
Wind at the Core: India Wind Energy Outlook Report

The Wind at the Core: India Wind Energy Outlook Report charts the path to 107 GW+ by 2030, unlocking India's role as a global wind export hub, and setting out the actions needed to fast-track deployment. The report was co-authored by GWEC and MEC Intelligence.

2025 POLICY PAPERS

Unlocking Japan's Offshore Wind Potential: Strategic Pathways to Overcome Market Bottlenecks and Drive Industrial Growth

This white paper explores Japan's offshore wind challenges and outlines strategic pathways to overcome market bottlenecks and get the industry back on track for growth.



Innovative Finance Mechanisms for Southeast Asia's Offshore Wind Take-off: A Study on Unlocking Blended Finance

This paper provides a tailored strategy for financing gigawatt-scale offshore wind projects in emerging markets and developing economies in APAC, considering local risks, resources and institutional realities.

Mission Critical: Building the Latin America and the Caribbean Wind Energy Supply Chain for a Clean and Just Energy Transition

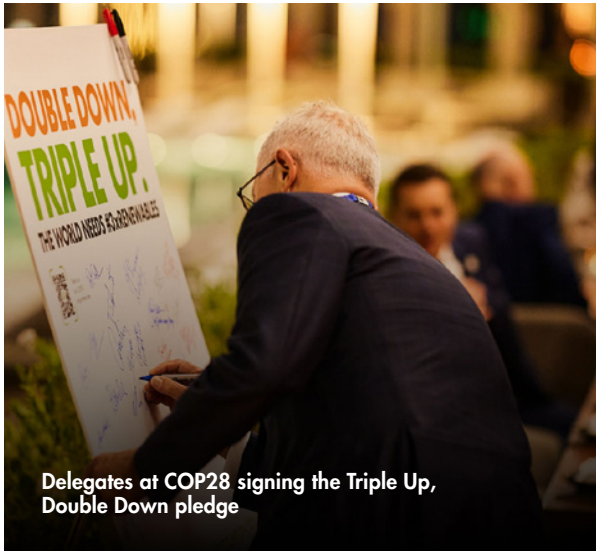
This report by GWEC and ERM maps onshore and offshore supply chains in Latin America and the Caribbean, identifying bottlenecks and outlines six key actions to enable a clean, competitive, and locally rooted wind industry.

Events and Conferences

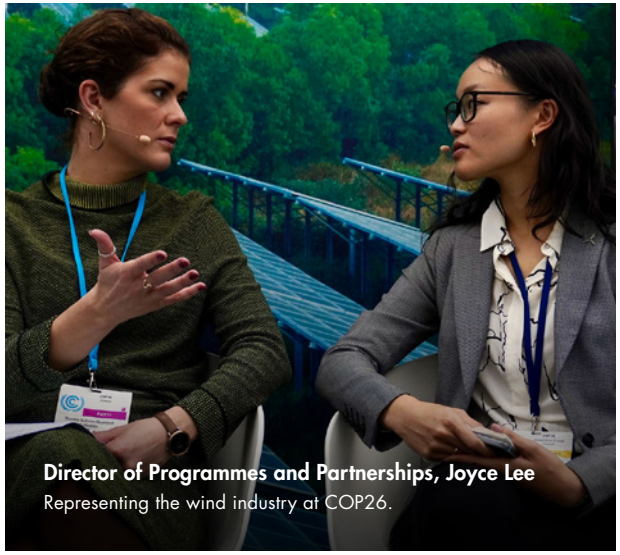
GWEC organises, co-hosts and supports an annual programme of conferences, events and online webinars attracting tens of thousands of participants each year.

We organise these events in partnership with our members and national and regional wind energy associations, with each edition focused on addressing challenges and opportunities impacting wind power growth.

Our events take place all over the world and bring together leading industry experts, major industry players, regulators and governments and representatives of multilateral institutions and the financial community.



Delegates at COP28 signing the Triple Up, Double Down pledge



Director of Programmes and Partnerships, Joyce Lee
Representing the wind industry at COP26.

Wind Industry Leaders
Speaking at a GWEC-Convened official UN COP Side Event at COP29

COP: Clean Energy and Climate Change

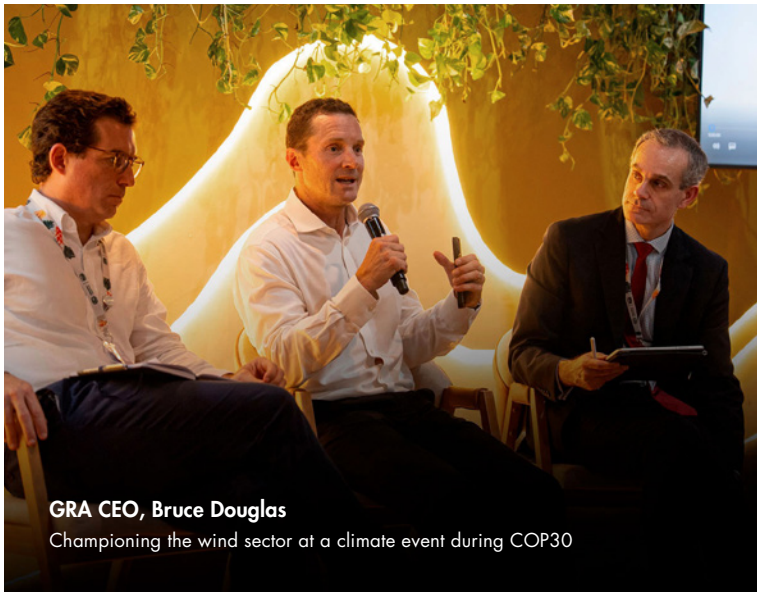
The worldwide wind sector is represented by GWEC at the annual United Nations Climate Summit (COP). Since the late 2000s – including at landmark summits including COP15 in Copenhagen, COP21 in Paris, COP26 in Glasgow and COP28 in Dubai – our team has played a significant role in advocating for wind power as a solution to climate change.

At each COP since 2022, GWEC has combined forces with trade bodies representing the solar, hydropower, geothermal and green hydrogen sectors, through the Global Renewables Alliance (GRA), to strengthen the collective voice of the renewables sector.

In 2023 at COP28, the GRA led a successful 'Double Down, Triple Up' campaign with partners across business, civil society and philanthropy, as well as government champions. The campaign sought to generate multilateral recognition of the need to double energy efficiency rates and triple renewable energy installations by 2030 to align the world with a net zero by 2050 trajectory, and culminated in the doubling and tripling targets being adopted as a pledge by more than 130 countries at COP28. The GRA continues to work as a 'guardian' of the targets by performing an annual stocktake alongside IRENA and the COP Presidency.

COP30: Pre-Cop Report Launch
Ben Backwell (CEO, GWEC) and Francesco La Camera (Director-General, Irena)

Vice-Chair Elbia Gannoum
Speaking at COP27 in Egypt



GRA CEO, Bruce Douglas
Championing the wind sector at a climate event during COP30

In November 2025, at COP30 in Belem, Brazil, GWEC led a global delegation seeking to ensure wind energy fulfils its potential as the foundation of the energy transition. COP30 represented a pivotal moment for climate leaders to strengthen their commitments and drive meaningful action toward a more climate-resilient world.

Delivering change at COP30

The COP30 summit in Brazil concluded on 22 November with 195 countries adopting the Belém Package comprising a raft of agreements on accelerating climate action, financing and addressing misinformation.

Making the case for wind power as a genuine alternative to conventional energy sources, GWEC's team – led by CEO Ben Backwell, Deputy CEO Rebecca Williams and Chair Michael Hannibal – met with high-level stakeholders to champion the essential role of wind energy in delivering on tripling renewables, improving energy security, and addressing rising misinformation and disinformation.

In the build-up to COP, GWEC directly engaged with the COP30 Presidency, including at the Pre-COP conference and New York Climate Week, conveying the perspective of the wind industry to help deliver an inclusive outcome through the intergovernmental negotiations and a multi-day event programme.

During the two-week summit, GWEC, working alongside the GRA and GOWA, led calls from the global business community for the world to transition away from fossil fuels towards renewable energy. GWEC strengthened its alliances, supported landmark new multilateral initiatives and released new reports in order to advance discussions on supply chains, finance, offshore wind and information integrity, demonstrating real momentum for wind energy worldwide.

Report Launch at COP30
Mission Critical: Building the Latin America and the Caribbean Wind Energy Supply Chain for a Clean and Just Energy Transition

GWEC CEO Ben Backwell with Selwin Hart, Special Adviser to the UN Secretary-General on Climate Action and Just Transition

Our Action

Global Industry Calls for Phaseout of Fossil Fuels

Global business leaders were united in calling for a global phaseout of fossil fuels. GWEC CEO and GRA Chair Ben Backwell hand-delivered a letter to COP President André Corrêa do Lago from industry calling for a 'robust, credible roadmap' to help countries and companies plan the shift to clean energy, strengthen energy security and reduce costs for consumers.

The COP of Truth Launches Global Information Integrity Initiative

GWEC joined a new Global Initiative on Information Integrity on Climate Change, one of the key outcomes of a landmark COP30 Declaration on Information Integrity on Climate Change. The aim is to promote multilateral collaboration to fund research and action combatting misinformation and disinformation on climate change.

GWEC & SSI Sign Agreement to Advance ESG and Traceability Standards

GWEC and the Solar Stewardship Initiative (SSI) signed a major agreement to enhance sustainability, transparency and resilience across renewable energy supply chains. This will help align best practices, enable knowledge exchange, and drive coordinated action to uphold these standards, demonstrating our collective commitment to responsible growth that supports project financing and allows developers and utilities to expand confidently without incurring compliance risks.

Ben Backwell with COP 30 President André Corrêa do Lago
Belem, Brazil

Roberta Cox, GWEC Policy Director, Brazil
Belem, Brazil

New Innovations in Finance can Half the Cost of Capital

Deputy CEO Rebecca Williams launched GWEC's new APAC financing report to an audience of policymakers and industry leaders at COP30. It outlines how blended finance and innovative instruments can unlock offshore wind investment in emerging Asia-Pacific markets, reducing costs and accelerating deployment.

Mission Critical: Enabling Latin America's Supply Chain

GWEC also launched the report, Mission Critical: Building the Latin America and the Caribbean Wind Energy Supply Chain for a Clean and Just Energy Transition. It finds the region must strengthen its wind energy supply chain to capture a once-in-a-generation growth opportunity from wind energy.

Renewable Energy Driving Green Industrialisation

In addition, GWEC published a study with ERM on Renewable Energy Driving Green Industrialisation. The report outlines how wind energy can continue to accelerate Brazil's energy transition while meeting the country's growing electricity demand without compromising its clean energy mix.

Global Renewables Summit

The Global Renewables Summit returned to New York in 2025 during the UN General Assembly and Climate Week NYC, bringing together heads of government, ministers, CEOs, investors and international organisations to accelerate the global clean energy transition.

The summit, held in September, was convened by the Global Renewables Alliance – supported by GWEC – in partnership with the European Commission, the COP30 Brazil Presidency, the Governments of the Commonwealth of the Bahamas and Kenya, and the International Renewable Energy Agency.

Building on the inaugural summit the previous year, this summit showcased the breakthroughs driving the renewable energy boom and set the stage for the next wave of political commitments and private-sector leadership.

GWEC Leading the Way

GWEC has played a pioneering role in the Global Renewables Alliance in 2023 which it helped to establish in 2022 together with leading clean energy trade associations.

Our CEO, Ben Backwell, became Chair of the GRA in January 2025. Taking the helm for a two year-period, his focus is on ensuring governments deliver strong renewable energy targets in their national climate plans to deliver a global target of tripling renewable energy by 2030.

"To meet the tripling goal, governments must set ambitious, specific and actionable national clean energy plans and back them up with supporting regulation to reignite investor confidence," Ben said upon his appointment as GRA Chair. "The private sector stands ready to work with policy-makers to speed up implementation and deliver action to meet government ambition."

The GRA, together with its partners, the We Mean Business Coalition and Climate Group, placed a full-page advertisement in The New York Times to coincide with the 80th Session of the United Nations General Assembly. The advert offered a powerful and clear message: Jobs, Security and Growth – The Future is Renewable.

Government Leaders and Private Sector Executives
At the High-Level Opening on Renewable Energy Abundance

Ditte Juul Jørgensen
At a Discussion on Unlocking Clean Energy Finance, GRS 2025

GWEC Geopolitics Summit

GWEC and Wilton Park, in partnership with the Stanley Center for Peace and Security, hosted an international summit on the Geopolitics of the Energy Transition in a Multipolar World in May 2025.

The UK summit was attended by current and former policymakers, leading experts on geopolitics, diplomacy and climate advocacy. The summit gathered over 40 participants representing more than 20 countries from G7 countries, Asia Pacific, Africa and the Middle East and Latin America.

Key recommendations from the summit, published in a report available on the Wilton Park website, included a recommendation that industry associations should play a central role in the development of a new narrative and political engagement strategy for the energy transition.

The summit enabled GWEC to strengthen relationships with leading regional think tanks and policy leaders across emerging regions, from Southeast Asia to the Caribbean. Building on this, GWEC is conducting a series of regional initiatives to translate the global trends identified during the Geopolitics Summit into strategies and advocacy principles applicable at both regional and national levels.

The summit will be followed by a 2026 event co-organised with Wilton Park on the hard politics of the energy transition. This event will explore themes such as the actors fuelling the shifting political landscape against the transition, public opinion, anti-net zero movements, the role of party politics, technological narratives, and strategies to rebuild momentum and restore renewables as the defining vision of the global energy future.

GWEC 20th Anniversary Celebration

To celebrate 20 years of developing wind energy across the world, GWEC welcomed leading representatives of the industry to a celebration in Lisbon.

The gala dinner in June 2025 brought distinguished guests together to celebrate the pioneers, innovators and inspirational figures who have worked alongside GWEC to grow the wind sector and are pointing the way to 'Wind Energy 2.0' in the context of global efforts to triple renewable energy.

Industry and Business Development

The wind power sector directly employs more than 1.5 million people worldwide[17] and, depending on the pace of growth, this figure could potentially reach over 6 million by 2050, according to IRENA[18].

Growing Industry Capacity to Meet Demand

With demand for renewable energy rapidly rising around the world, GWEC is actively engaged in government and industry driven initiatives to expand, grow and strengthen the wind industry in all regions of the world to keep pace.

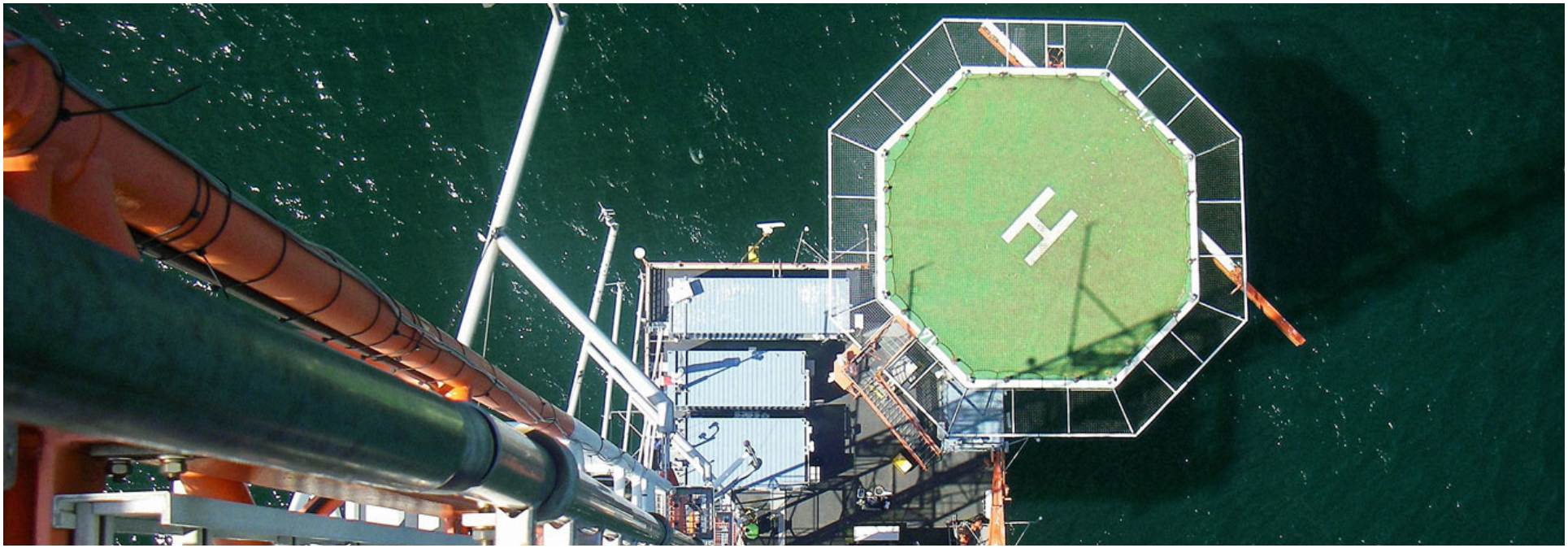
The Global Wind Workforce Outlook, a detailed industry forecast published in December 2025 by GWEC and the Global Wind Organisation (GWO), concluded that around 628,000 technicians will be required between 2025 and 2030, with over 40% of these expected to be new industry entrants.

GWEC has convened taskforces in regions such as Africa, Latin America and Southeast Asia, strengthened its engagement with national and regional associations, and spearheaded a global programme to address a gender imbalance in the workforce by encouraging more women to enter the profession.

In addition, GWEC supports capacity building initiatives in collaboration with partner organisations, which are designed to strengthen the knowledge and technical capabilities of national institutions and businesses.

[17] Wind jobs in 2023 according to IRENA
https://www.irena.org/Energy-Transition/Socio-economic-impact/Energy-and-Jobs

[18] IRENA Future of Wind Report 2019



Taskforces

GWEC has established a number of dedicated taskforces, comprising senior representatives of industry and national and regional associations, to help accelerate the deployment of wind power globally. These taskforces:

- Act as a bridge between industry players and local stakeholders including governments, facilitating dialogue to build momentum for wind deployment.
- Produce position papers, white papers and recommendations to create the right enabling conditions for wind deployment across policy, regulation, permitting, grid access and financing.
- Drive regional cooperation and market intelligence, identifying key trends, barriers and opportunities.
- Support capacity-building through the organisation of events, webinars, workshops and communications to raise awareness and showcase best practices.

Offshore Wind

GWEC's Offshore Wind Taskforce was established in 2018 with a mandate to accelerate the development of offshore wind technology, with a strategic focus on markets outside of Europe. The taskforce has developed policy guidance for governments on regulatory frameworks and tendering systems for offshore wind. The working group seeks to spread best practices to help transfer knowledge and experience to countries with offshore wind ambitions.

Floating Offshore Wind

GWEC's Floating Offshore Wind Taskforce was founded in 2020 in order to drive global growth in the emerging floating offshore wind sector. The working group serves as an influential forum for pioneering industry leaders to exchange knowledge about the policy and technical advancements required to scale up this game-changing technology.

Network of Associations

GWEC draws its historic mandate from the national and regional wind energy associations which first called for its founding two decades ago.

For over 20 years, our team has been cultivating a global network of association partners around the world. In line with our mandate and founding principle to open new markets for wind energy, we have played a role in creating and growing many of the associations in this network.

National associations, particularly in emerging and developing economies (EMDEs), are generally underfunded and lack institutional capacity to effectively influence policymaking processes.

As GWEC advocates for the policy and regulatory environment which will allow new wind projects to flourish, our global team works closely with these locally rooted associations to coordinate activities and exchange knowledge.

CEO of Portuguese Association of Renewable Energy, Pedro Amaral Jorge
At the GWEC GAP Summit

Global Associations Platform

GWEC's Global Associations Platform (GAP) provides a platform for mobilising and supporting the world's wind associations. This network, based around knowledge exchange, capacity building and joint initiatives, includes regional and national wind trade bodies of all major and emerging economies across Europe, the Americas, Asia Pacific and Africa.

The GAP aims to support associations across five thematic areas:

01
Knowledge exchange
Sharing case studies, data and experience on key issues - policy position consolidation from GWEC's global network.

02
Advocacy
Presenting regional and global policy positions at global and regional events and forums such as COP and industry events.

03
Fundraising
Raising funds for the collective work of the industry through the global network of associations representing wind and renewable energy.

04
Stakeholder engagement
Bringing together experts from organisations outside industry to provide complementary perspectives to inform our advocacy.

05
Communications and events
Serving as a point of coordination for media engagement in support of common objectives and sharing information and opportunities on events from across the network.

GWEC GAP Summit

GWEC's first ever in-person Global Associations Summit was held in June 2025, in Lisbon, Portugal, marking a seminal moment in the evolution of the Global Associations Platform (GAP).

The summit convened national and regional association leaders from over 30 countries to address the opportunities and challenges facing associations in their roles to drive the energy transition.

Participants were brought together with private-sector representatives, civil society leaders and government policymakers in a forum to tackle systemic barriers and build alignment on topics such as grids, permitting, social acceptance, misinformation and finance.

The themes of the summit covered how to build influence and establish a winning narrative for communications, how to develop partnerships for long-term growth, and how to address barriers to growth.

The GAP Summit reinforced a shared understanding across this global network on the need for associations on the front lines of the energy transition to build their influence, through collaboration, capacity building and additional resources, in order to compete on a level playing field – and win.

With a focus on strategic communications, political engagement strategies and advocacy tactics, the summit began to create a consensus around how to build effective and influential strategies to engage policy and decision-making processes.

The summit resulted in:

- Building a community – Consolidating a strong community of associations based on collaboration, knowledge exchange, and joint initiatives.
- Aligning actions – Collectively addressing wind energy's challenges and growth opportunities across global markets and building common strategies.
- Exchanging knowledge – Sharing experiences and best practices from across GWEC's global network around key areas such as public affairs, advocacy, communications and community engagement.
- Planning a roadmap – Agreeing next steps for the long-term development of the GAP, in terms of governance, strategic priorities and ways of working together.

From left to right, from top to bottom:
1. GWEC's Thang Vinh Bui and Emerson Clark
2. Héctor Treviño, AMDEE Executive Director listening to Alexandra Hernández, President of SER Colombia
3. Qin Haiyan, Secretary-General, Chinese Wind Energy Association
4. GWEC's JuMan Kim and Deok-hwan Choe from KWEIA
5. GWEC's Heba Rabie with Poch Ambrosio, President WEDAP

The GAP Summit 2025 reaffirmed the importance of global collaboration and multi-stakeholder engagement. As the wind sector enters a new phase of accelerated deployment, it must evolve not only in technology and scale, but in influence, partnerships, and narrative power.

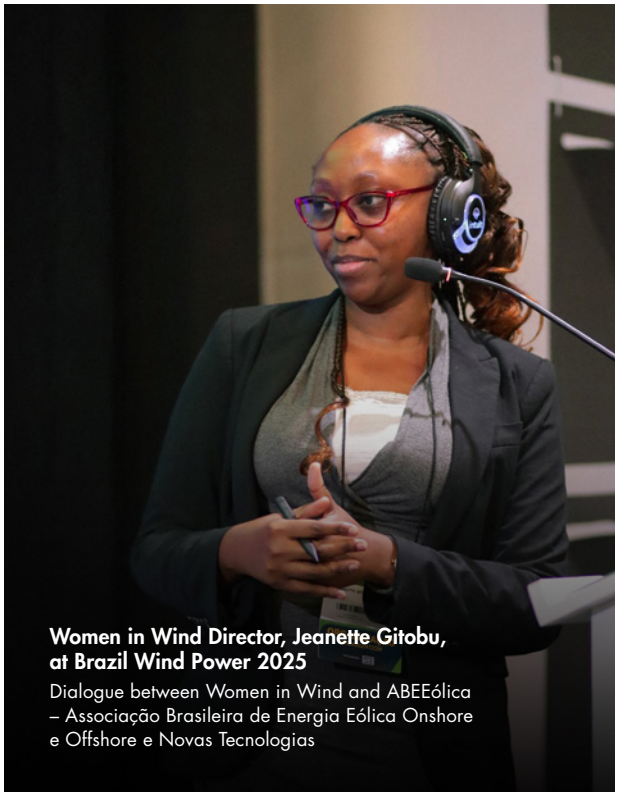
The GAP network stands ready to help lead that transformation by connecting regions, sharing knowledge, and forging the coalitions needed to drive wind forward, faster. Looking ahead, the GAP network will build on the momentum of the Summit through regular regional and thematic convenings, strengthened bilateral exchanges, and deeper collaboration on shared challenges.

A GAP Leadership Group will be established along with a dedicated knowledge-sharing platform to ensure coordination and collaboration only strengthens going forward.

Women in Wind

The clean energy transition is one of the most significant economic and social shifts of our time, promising millions of new jobs worldwide and demanding diverse skillsets across the value chain.

Yet the wind sector remains starkly unequal: according to IRENA (2020), women represent just 21% of the industry's workforce, compared to 32% across renewables, and only 8% in senior leadership where decisions and innovation are most concentrated.



Women in Wind Director, Jeanette Gitobu, at Brazil Wind Power 2025
Dialogue between Women in Wind and ABEEólica – Associação Brasileira de Energia Eólica Onshore e Offshore e Novas Tecnologias

Closing the gender gap

Barriers to participation are systemic. In many countries and sub-sector industries, entry opportunities for women are restricted by cultural norms framing energy as a 'male domain', reinforced by disparities and biases in recruitment processes and the absence of gender-based employment targets.

Retention can suffer from opaque employment practices, limited availability of family-friendly policies, and workplace cultures that can undervalue inclusivity. Career advancement may be blocked by the so-called 'glass ceiling', a lack of structured mentoring and progression pathways, and persistent perceptions of pay inequality between men and women.

These gender obstacles not only disadvantage women working in wind power but also limit the sector's ability to innovate, scale and accelerate the deployment of renewable energy. Companies that fail to dismantle these structural barriers are losing access to female talent and suffer from a lack of diversity in management and leadership, both of which are proven drivers of stronger performance.

Across the globe, the clean energy transition faces a serious skills shortage. The IEA warns that without enough engineers, technicians, and grid specialists, clean energy projects will be delayed, prolonging the world's reliance on fossil fuels. The workforce gender gap is therefore, in effect, a climate gap. Unlocking women's full participation should be seen as both an equity imperative and a workforce strategy essential to delivering the transition on time.

"The biggest impact was gaining self-confidence and understanding that many of the biases we face stem from gender stereotypes, not personal shortcomings."

- 2022 Women in Wind Mentee

"Meeting the amazing mentees was the most impactful thing for me. They are truly inspiring and continue to give me hope for the future."

- Mentor, 2019–2024

Women in Wind 2024 Hamburg Study Tour
At Wind Energy Hamburg

Our Approach

GWEC's Women in Wind Global Leadership Programme (WIW) was launched in 2019 with the goal of accelerating the careers of women in the wind industry, supporting their pathway to leadership positions and fostering a global network of mentorship, knowledge-sharing and empowerment.

The initiative has supported the next generation of female leaders through a 12-month journey of mentorship, training, and networking. Mentees are early-to-mid-career professionals from 20+ emerging wind markets including countries such as Brazil, India, Kenya, Mexico, South Africa, and Vietnam. To date, the programme has successfully paired 110 women from 22 emerging markets with experienced mentors.

By centering on the Global South, where women are most affected by climate change and where wind energy markets are emerging, we equip them with the skills, visibility, and networks to lead solutions, especially in STEM (Science, Technology, Engineering, and Mathematics) fields.

Our Impact

Over six years, the Women in Wind programme has emerged as a catalyst for change in the sector. According to the programme's impact evaluation conducted in 2025, the programme has demonstrated measurable progress in advancing women's leadership, confidence, and career development across the wind energy industry.

- 77% of participants reported they have advanced in their careers, and 71% said they have greater confidence to pursue leadership roles.
- 65% report they developed leadership and management skills, while 69% said they learned strategies to overcome workplace challenges.
- Mentee employers benefited as well: 35% reported that they introduced new diversity, equity and inclusion policies, and 25% said they increased hiring of women in leadership after their staff joined the programme.
- Mentorship has consistently been one of the most valued aspects of the WiW programme. Strong mentor-mentee relationships not only accelerated career growth but also provided personal support and global perspectives. The presence of WiW mentees within companies created ripple effects, influencing hiring practices, awareness of gender diversity, and workplace culture, well beyond the direct participants.
- Alumni continued to mentor, advocate and build their own professional networks within and beyond their places of work.

Jeanette Gitobu
Speaking at WindEnergy Hamburg

Participants in a Women in Wind Study Tour
Washington DC, USA

04 GWEC IN ASIA-PACIFIC

GWEC
in Asia Pacific

Regional Context

The Asia Pacific region is by far the world's largest region for wind energy. In the 2025 Global Wind Report the region recorded a 75% global market share, having experienced 7% year-on-year growth[19].

China is the engine of the region's growth in wind power. The country added 80 GW in new wind capacity in 2024, accounting for nearly 70% of all global additions, and in the process became the first country worldwide to reach half a terawatt of total installations (520 GW).

While the region's wind energy supply chain is concentrated around China and, to a lesser extent India, other countries are set to play an increasingly significant role in meeting the region's climate targets, requiring accelerated policy support and investment to stay on track.

By 2030, Asia Pacific is expected to account for over half of global wind installations. Total onshore wind capacity in the region could double to 1,084 GW within the decade, with another 122 GW of potential capacity from offshore wind by 2030[20].

GWEC ASIA
GLOBAL WIND ENERGY COUNCIL

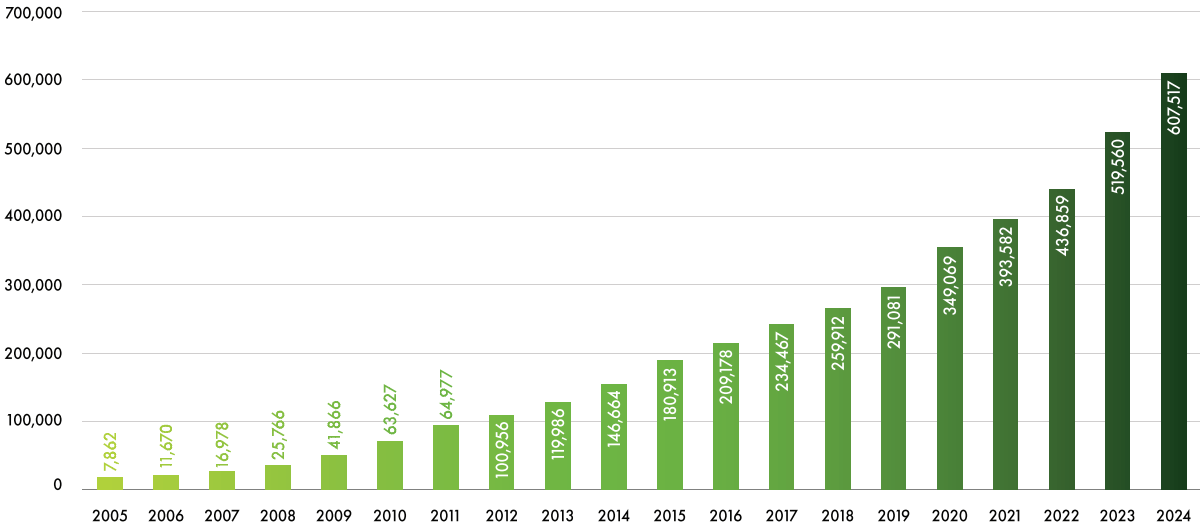
[19] GWEC Global Wind Report 2025

[20] GWEC Building the Asia Pacific Wind Energy Supply Chain for a 1.5°C World Report (2024)

ASIA PACIFIC 2005-2024

Cumulative Wind Installed Capacity (MW)

Source: GWEC Market Intelligence



Among the key challenges facing the region's wind industry, as highlighted in GWEC's 2024 APAC Supply Chain Report, is the lack of consistency in government policy and market demand which deters the supply chain from scaling production. Political pressure around supply chain security and inflexible local content targets have also served to drive up costs and have caused delivery delays.

A lack of coordinated investments in large infrastructure such as grids and ports remains a major inhibitor to future wind sector growth. Attempts to standardise and industrialise the wind supply chain have also been hampered by a constant race to deliver ever larger wind turbines.

Our Approach

The GWEC Asia team was established to support the association's network of members operating across Asia, providing policy advocacy, organising local events, and acting as the regional representative of GWEC at national and regional platforms. The team is headquartered in Singapore, with country offices in the Philippines, Japan, South Korea and Vietnam.

Working with governments, partners and stakeholders in the industry, including trade associations such as such as the Chinese Wind Energy Association (CWEA) and Indian Wind Turbine Manufacturers Association (IWTMA) among others, GWEC is continu-

ing to support the APAC wind supply chain in order to help safeguard global climate goals.

GWEC is working with governments to prioritise development of the extensive offshore wind resources that coastal countries enjoy across the region. GWEC's core strategy in APAC is to create and support a Route to Market policy framework at the country level and to back this up by facilitating the development of enabler policies covering finance, supply chain and infrastructure.

GWEC's Route to Market framework has been initially developed and tested in Vietnam and the Philippines. It is now being adapted to further countries within the region, and GWEC is also piloting the scale up of this framework approach globally, drawing on lessons learned in APAC, The framework draws on knowledge and insights developed by organisations such as the World Bank/ESMAP, bringing clarity and consistency to policy dialogues, and enabling governments and industry to engage more effectively on complex market issues.

On auction design and risk-sharing, the Route to Market framework comprises principles to ensure more balanced risk allocation between government and industry, helping to shape auction models and map offshore wind investment risks and engage financial stakeholders through education and outreach. GWEC's work in this area aims to lower the cost of capital, with multiple papers developed on concessional finance and innovative risk-sharing mechanisms.

On supply chain development, the Route to Market framework has articulated a regionalised supply chain vision, with hubs created across Asia. It also advocates for free trade in components and industrial policy measures that underpin long-term sector growth.

In 2024, GWEC published an APAC Supply Chain report, its first of its kind, written in partnership with ERM. The report focused on six countries – Australia, Indonesia, Japan, Philippines, South Korea and Vietnam – and provided recommendations for policymakers to turn targets into turbines.

Liming Qiao, João Esteves and Mark Hutchinson
At GGI's Asia-Pacific Annnual Dialogue

GWEC's South East Asia Task Force focuses on unlocking the potential of wind power in the region, working with local and international stakeholders to accelerate large-scale deployment of South East Asia's wind resource.

gwec.net/policy/taskforces/south-east-asia

GWEC
SOUTH EAST ASIA TASK FORCE

POLICY

FORGING A PATHWAY FOR OFFSHORE WIND IN VIETNAM

In September 2025, at the APAC Wind Energy Summit, the Government of Vietnam announced plans to adopt a two-stage model for offshore wind deployment as proposed by GWEC.

Bui Vinh Thang, GWEC's Vietnam Country Manager, welcomed the stronger ambition for both offshore and onshore wind in the country's revised Power Development Plan (PDP8), which will make the country the third largest wind market in APAC once projects are built. "Vietnam is on the right track to be an offshore wind powerhouse in the APAC region," he commented.

During the summit, GWEC held bilateral meetings with the Ministry of Industry and Trade, Ministry of Agriculture and Environment, Central Committee for Policy and Strategy and PetroVietnam Power Corporation among others (pictured below).

GWEC Team with Vietnamese Government Officials
At the APAC Wind Energy Summit 2025

EVENT

GWEC APAC WIND ENERGY SUMMIT

GWEC brought together leading wind sector companies and experts, political leaders and wider stakeholders from across the Asia-Pacific region to collaborate on wind energy acceleration solutions at the APAC Wind Energy Summit, in Melbourne, Australia, in September 2025.

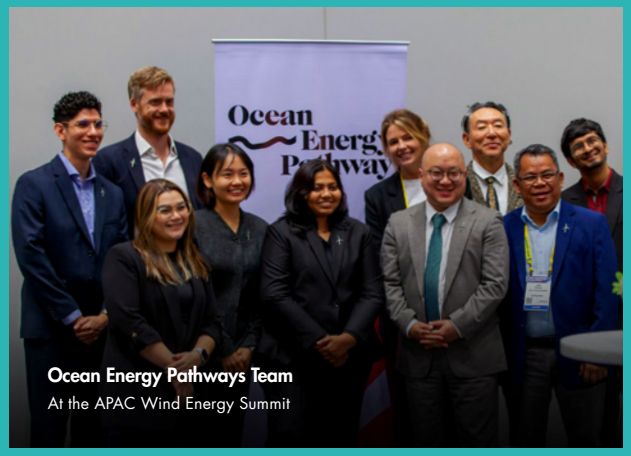
The three-day conference and exhibition saw participants develop innovative and collaborative solutions to address challenges faced in supply chain and market design in wind energy development. The event provided a platform to drive the discussion for what is needed to accelerate the growth of wind energy across the region.

Victoria's Minister for Climate Action and Energy and Resources, Lily D'Ambrosio MP.

Hon. Lily D'Ambrosio MP Minister for Climate Action, Minister for Energy and Resources, Minister for State Electricity Commission Victoria State Government
At the High Level Forum: Working Together to Unlock APAC's Wind Energy Potential

GWEC's Chief Industry Officer Stewart Mullin and Bernhard Telgmann, President - Technology, CTO, Suzlon Energy
At the Breakout Session: Maximising Performance in Australia's Onshore Wind Operations and Maintenance Capability through Technology Innovations, Supply Chain and Workforce Collaboration

Giovanni Carlo J. Bacordo, Undersecretary, Department of Energy
At the Offshore Wind Rising: Seizing the Philippines Opportunity Co-Hosted by the World Bank Group Session



Ocean Energy Pathways Team
At the APAC Wind Energy Summit

Our Impact

Since GWEC's founding in 2005, our team has worked closely with locally based associations, policymakers and regulators on the development of renewable energy policy across the APAC region.

Since playing an early and instrumental role in supporting the development of both China's and India's wind sectors, GWEC has positioned itself at the centre of the wider region's energy sector transformation, working to convene stakeholders, influence policy frameworks, support the creation of market and auction systems, and help governments and industry accelerate deployment.

"When Mongolia first established contact with GWEC in 2010, the country did not yet have a single grid-connected wind farm. Since then, through a series of initiatives to promote and support wind energy development and attract investors, Mongolia has successfully built three wind farms with a total installed capacity of 155 MW, which now supply around 10% of the country's total domestic electricity generation. GWEC's broad and continuous cooperation has played a vital role in helping Mongolia's wind energy sector take off and establish a strong foundation for future growth."

- Myagmardorj Enkhmend,
Board Member, Mongolian Renewables Industry Association

Major APAC Policy Outcomes (2020-2025)

2020

South Korea and Japan pledge carbon neutrality by 2050

2021

China targets 1,200 GW of wind and solar by 2030 in 14th Five-Year Plan

Taiwan improves Round 3 rules on local content and price cap risks

Japan launches Vision for Offshore Wind, targeting 10 GW by 2030

2022

Australia declares its first six federal offshore wind zones

2023

Vietnam's Power Development Plan targets 7 GW offshore wind by 2030

2024

India announces new offshore wind tenders in Gujarat and Tamil Nadu

2025

Vietnam revises PDP8 improving offshore and onshore wind model

Philippines opens first competitive offshore wind green auction

Japan's second Vision for Offshore Wind introduces new auction system

China sets 120 GW yearly target (15 GW offshore wind) in 15th Five-Year Plan

Beijing Declaration on Wind Energy 2.0 aims for 5,000 GW by 2060

At the national and local level, GWEC continues to be seen as a trusted adviser to government and industry, helping to share knowledge and best practices from around the globe in the design and implementation of wind sector regulations, auction design parameters and supply chain strategies.

GWEC continues to influence national wind policies across the wider region. GWEC has played a significant role, for example, in shaping Taiwan's offshore wind market. supporting a revision to the Feed-In Tariff (FIT) scheme in 2019, as well as improvements to Round 3 auction rules in 2021 to mitigate local content and price cap risks.

During 2025, our close engagement with industry and policymakers has helped to shape new regulatory frameworks. In Vietnam, we supported a revision of the country's Power Development Plan 8 involving a new two-stage offshore wind policy with a competitive investor selection model. In Japan, we also supported a second Vision for Offshore Wind Industry policy introducing a new competitive auction system and measures to support industry growth.

The long-term outlook for wind deployment across Asia Pacific remains positive. Governments across the region including South Korea, Japan, Vietnam and the Philippines are now implementing policies to accelerate market development and de-risk new projects. Offshore wind outside of China and India is at an early but pivotal stage.

With the right enabling policies – covering finance, infrastructure, and market design – the APAC region can unlock a resilient, competitive and sustainable offshore wind industry.

Action in 2025

East Asia & Pacific

Financing Offshorewind in the Asia Pacific Region

GWEC published a paper in June 2025 exploring the key factors influencing the levelised cost of electricity (LCOE) for offshore wind projects across APAC. The publication examines how macroeconomic conditions, regulatory frameworks, market maturity and technological innovation shape the economics of offshore wind.

New vision for Japan's Offshore Wind Industry

In August 2025, GWEC welcomed the launch of Japan's second Vision for the Offshore Wind Power Industry, building on an earlier strategy first released in 2020. This revised strategy outlines a new roadmap to strengthen the country's floating offshore wind industry, positioning Japan as a global leader in floating offshore wind technology, manufacturing and standards.

Sector Leaders Gather for APAC Wind Energy Summit

In September 2025, GWEC hosted the annual APAC Wind Energy Summit in Melbourne, Australia. The event brought together leading wind sector companies and experts, political leaders and wider stakeholders from across the Asia Pacific region to collaborate on wind energy acceleration solutions.

Building Offshore Wind Economies in Asia Pacific

In September 2025, GWEC published the report, Building Offshore Wind Economies in Asia Pacific: Strategic Pathways for Industrial Growth. It sets out a comprehensive framework for industrial policy in offshore wind, drawing on lessons from nearly four decades of global development. It outlines the key actions policymakers can take to de-risk investment, accelerate market growth, and enable long-term socio-economic benefits.

Offshore Wind Auctions in South Korea

In September 2025, GWEC welcomed South Korea's award of 689 MW of offshore wind projects in its fixed-bottom offshore wind auction. Signalling the country's strong ambition to expand its wind capacity, the tender was organised by the Ministry of Trade, Industry and Energy and the Korea Energy Agency.

New Era for Offshore Wind in Japan

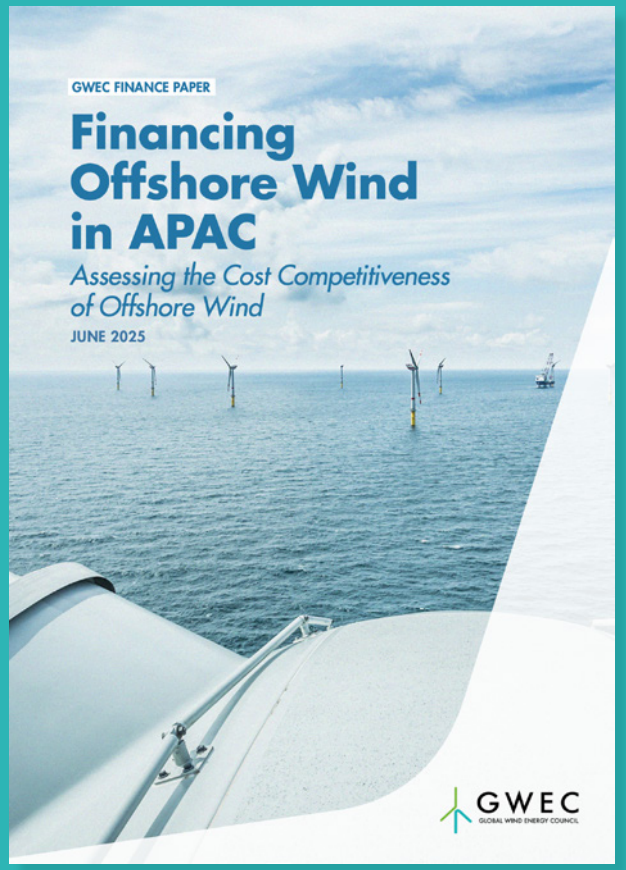
In October 2025, GWEC co-organised the Global Offshore Wind Summit-Japan, in Akita, together with the Japan Wind Power Association. The event aimed at strengthening Japan's industrial base and driving technological advancement in offshore wind, at a time when the Japanese government is preparing for upcoming offshore wind auctions.

Wind Energy 2.0 Declaration Sets Ambition Sky High

In October 2025, GWEC welcomed the Beijing Declaration on Wind Energy 2.0, a joint statement by more than 1,000 wind power companies at the opening of China Wind Power 2025. The plan calls for 120 GW of new capacity every year, including 15 GW from offshore wind, with the goal of reaching an historic 5,000 GW of wind power capacity by 2060. The annual target is double the installation goal set in the Beijing Declaration 1.0 from 2020.

Auction Redesign in Japan to Accelerate Offshore Wind

In November 2025, GWEC published the white paper, Unlocking Japan's Offshore Wind Potential: Strategic Pathways to Overcome Market Bottlenecks and Drive Industrial Growth. The publication outlines short-term and long-term recommendations to strengthen Japan's offshore wind framework.



REPORT

FINANCING OFFSHORE WIND IN THE ASIA PACIFIC REGION

As economies in the Asia Pacific region move to triple renewable capacity by 2030 and achieve net-zero emissions by 2050, reducing the cost of offshore wind will be essential.

One of a series of landmark GWEC reports, this finance-focused paper published in June 2025 explored the main factors influencing the levelised cost of electricity (LCOE) for offshore wind projects across Asia Pacific, drawing comparisons with mature markets like the UK, Germany and China.

The paper assesses how macroeconomic conditions, regulatory frameworks, market maturity and technological innovation shape the economics of offshore wind. It also outlines what governments and investors can do to unlock cost reductions.

Action in 2025

South & Southeast Asia

Consultation on India supply chain costs

In April 2025, GWEC and its Indian Onshore Wind Working Group organised a roundtable with the chief financial officers and taxation experts of OEMs and component suppliers on the impact of a proposed 12% government goods and services tax on renewable energy equipment including wind turbine generators and other sub-components.

Philippines launches offshore wind auction

In June 2025, GWEC welcomed the Philippines' Department of Energy opening its first offshore wind focused competitive green energy auction. The auction seeks to allocate 3,300 MW of fixed-bottom offshore wind capacity for delivery between 2028 and 2030.

India's new wind power roadmap

In August 2025, GWEC published the report, The Wind at the Core: India Wind Energy Outlook Report, which set out a roadmap for the South Asian country to reach 107 GW+ by 2030. The report recommends tackling challenges around PPA signings and grid development.

Thailand's offshore wind pathway

In August 2025, GWEC supported a workshop organised by the Thai Wind Energy Association aimed at developing an offshore wind roadmap with the government. Our Philippines Country Manager shared learnings from GWEC's experience in preparing for offshore wind development in Southeast Asian markets such as Vietnam and the Philippines.

Philippines adds more onshore wind capacity

In September 2025, GWEC welcomed the results of the Philippines' latest onshore wind auction, which saw over 2.2 GW of onshore wind capacity awarded through the government's Green Energy Auction 4. The awarded projects are scheduled for delivery between 2026 and 2029.

India Wind Energy Market Outlook Report Launch
August 2025, India

Thai Wind Energy Association Workshop
August 2025, Thailand

Meeting with Vietnam Ministry of Industry and Trade on Auctions
March 2025, Vietnam

Vietnam Adopts Two-Stage Offshore Wind Process

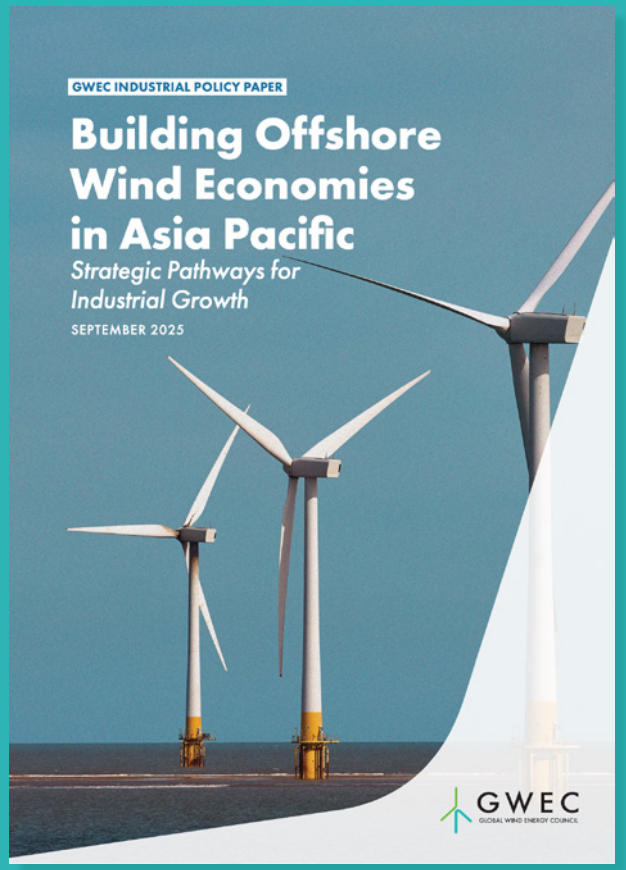
GWEC welcomed Vietnam's progress in developing regulations for wind power. In September 2025, Vietnam announced that it will adopt a two-stage model for offshore wind development. This approach, which was proposed by GWEC, will ensure projects are thoroughly tested and set up for long-term success.

India Slashes Tax on Wind Generators

In September 2025, GWEC welcomed the Government of India's decision to reduce the Goods and Services (GST) tax rate on wind turbine generators from 12% to 5%. GWEC had lobbied the government following its April consultation and argued for retaining the previous lower rate to avoid serious impacts on the country's wind sector.

Philippines Provides Long-Term Visibility to Investors

At GWEC's APAC Wind Summit in Melbourne, Australia, the Philippines government showcased its strong progress in offshore wind development, confirming that it will release a comprehensive Renewable Energy and Offshore Wind pipeline by the end of 2025, providing long-term visibility on the country's capacity build-out.



REPORT

BUILDING OFFSHORE WIND ECONOMIES IN ASIA PACIFIC

Offshore wind is a promising driver of industrial growth and clean energy in Asia-Pacific. Its success is powered by clear and supportive public policy, which can turn complexity, capital intensity, and supply chain challenges into opportunities for investment, innovation, and resilient growth.

In September 2025, GWEC published a policy paper setting out a comprehensive framework for industrial policy in offshore wind, drawing on lessons from nearly four decades of global development. It outlines the main actions policymakers can take to de-risk investment, accelerate market growth, and enable long-term socio-economic benefits.

Through case studies and cross-country analysis, the report demonstrates how targeted policies – covering capacity targets, financing, supply chains, workforce, land and sea connection, governance, and innovation – can move markets from foundation to scaling and maturity. It highlights both global best practices and tailored recommendations for emerging markets in the region, offering a clear roadmap.

EAST ASIA AND PACIFIC

FEATURED COUNTRIES

China

Since the Chinese government first introduced feed-in tariffs under the Renewable Energy Law in 2006, the country has seen massive growth in its wind sector, aided by ambitious and expansive policymaking and target setting.

China became the world's largest wind market in 2010 and has since consolidated its status as an engine of wind power growth both in the APAC region and worldwide. The country is now the world's largest wind turbine manufacturing hub, accounting for more than two-thirds of global outputs of turbine nacelle and key components such as gearboxes, generators and blades.

GWEC has a long tradition of engagement with China's wind sector. From its founding in 2005, GWEC's team has worked closely with China's two principal trade associations, the Chinese Renewable Energy Industries Association (CREIA) and the Chinese Wind Energy Association (CWEA), to help promote China's adoption of clean energy sources as an alternative to fossil fuels.

Through its strong relationship with CREIA and CWEA, GWEC supports the development of China's wind power sector and engages with China's central governmental body, the National Energy Administration (NEA) and provincial energy administrations.

CWEA, CREIA and GWEC jointly created the China Wind Power conference and exhibition, which was first held in 2008. China Wind Power has since grown into one of the world's largest and most influential wind energy exhibitions. China Wind Power 2025 was held in Beijing in October, attracting over 120,000 visitors.

The Global Offshore Wind Summit-China is another significant event co-organised by GWEC, CWEA and CREIA which has helped to stimulate offshore wind development both at national and provincial levels. In June 2025, the 10th edition was held in Dalian, Liaoning Province. Over the past decade, the event has been hosted in most coastal provinces (Jiangsu, Zhejiang, Fujian, Guangdong, Guangxi, Hainan, Hebei and Liaoning).

Setting out a long-term ambition to limit its carbon emissions, in 2020 President Xi Jinping announced the twin goals of peaking China's carbon emissions by 2030 and achieving carbon neutrality by 2060. That year, more than 400 wind energy companies issued the Beijing Declaration on Wind Energy at the China Wind Power conference, setting out goals for wind power growth in China that have since been exceeded.

Five years later, in October 2025, the Chinese government announced its 15th Five-Year Plan for the period 2026-2030, under which China's annual new installed capacity must be no less than 120 GW, including 15 GW from offshore wind. This would ensure that China's cumulative wind power capacity reaches 1,300 GW by 2030, 2,000 GW by 2035, and 5,000 GW by 2060. In addition, the government announced a new target to reduce net greenhouse emissions to 7-10% below peak levels by 2035.

At China Wind Power 2025, held in Beijing, October 2025, China's wind industry community supported by CWEA and CREIA, issued the historic Beijing Declaration on Wind Energy 2.0. The declaration, which was endorsed by GWEC, underlined the call for 120 GW of new capacity to be installed in China every year, including 15 GW from offshore wind.

EVENT

CHINA WIND POWER 2025

GWEC co-hosted China Wind Power 2025 in Beijing between 20-22 October with the Chinese Wind Energy Association (CWEA) and the Chinese Renewable Energy Industries Association (CREIA).

Since it was first held in 2008, China Wind Power has grown into one of the world's largest and most influential wind energy exhibitions. The 18th edition, China Wind Power 2025, attracted more than 120,000 visitors and featured over 1,000 exhibitors.

Beyond its role as a trade and exhibition platform, China Wind Power also serves as a forum for industry and government to meet and discuss the development of wind energy policies in China. More than 300 speakers shared their expertise and insights during this year's event.

At China Wind Power 2025, the Beijing Declaration on Wind Energy 2.0 was unveiled, a united call to accelerate global wind deployment and deepen international cooperation to meet the world's wind energy goals.

China Wind Power 2025 Exhibition

GWEC's Chief Research Officer Feng Zhao
At China Wind Power

EVENT

GLOBAL OFFSHORE WIND SUMMIT - CHINA

The 2025 Global Offshore Wind Summit-China, organised by GWEC and the Chinese Wind Energy Association (CWEA), was themed around Cross-sea Cooperation for a Shared Future: Building a New Global Ecosystem for the Wind Power Industry.

Hosted in Dalian, Liaoning Province, this was the 10th edition of the summit. GWEC's Chief Research Officer Feng Zhao presented GWEC's latest Global Offshore Wind Outlook during the keynote session, while South Korean Country Manager JuMan Kim and Japan Policy Advisor Akihiko Kurashina joined a supply chain panel discussion, discussing how the industry can work together to accelerate offshore wind development in the region.

The event saw the release of the 'Liaoning Consensus', aimed at promoting offshore wind development in the north of China. By developing 13 GW of offshore wind capacity, Liaoning province aims to achieve sustainable economic growth, develop a robust marine economy and establish a world-class wind manufacturing hub to accelerate offshore wind development in Northeast Asia and beyond.

South Korean Country Manager JuMan Kim and Japan Policy Advisor Akihiko Kurashina
At the Global Offshore Wind Summit

Chinese Wind Industry leaders
Dalian, China

GWEC's Chief Research Officer Feng Zhao
At the Global Offshore Wind Summit in China

EAST ASIA AND PACIFIC

FEATURED COUNTRIES

Japan

While wind power today makes up just over 1% of Japan's total electricity generation, the country has immense technical potential especially in offshore wind. Driven by decarbonisation targets and energy security concerns, the Japanese government has in recent years sought to put in place policy and regulatory foundations to accelerate the development of offshore wind.

In 2020, the government launched its first Vision for Offshore Wind Power Industry, targeting 10 GW by 2030 and 30-45 GW by 2040, which was informed by a cost reduction study jointly presented to government by GWEC and the Japan Wind Power Association (JWPA).

Since then, Japan has gone through three separate rounds of offshore wind auctions. Each of the projects to be awarded during these auctions has however been confronted with global headwinds such as high inflation, supply chain shortages, high interest rates, and price hikes of raw materials.

Since the results of the Round 3 auction were announced in March 2025, the government has been reviewing how to assist the awarded projects. In addition, it has sought to restart the Round 1 tender after the winner of that auction withdrew from all three awarded projects in August 2025.

Seeking to support the country during this challenging period, GWEC has engaged with policymakers and national stakeholders such JWPA who are seeking to learn from international good practices and address local challenges in auction design.

In June 2025, GWEC hired its first Japan Country Manager and subsequently, in July 2025, GWEC founded the Japan Offshore Wind Working Group (JOWG) to lead policy dialogue and advocacy efforts, collaborating with JWPA and local stakeholders and participating in national and regional events.

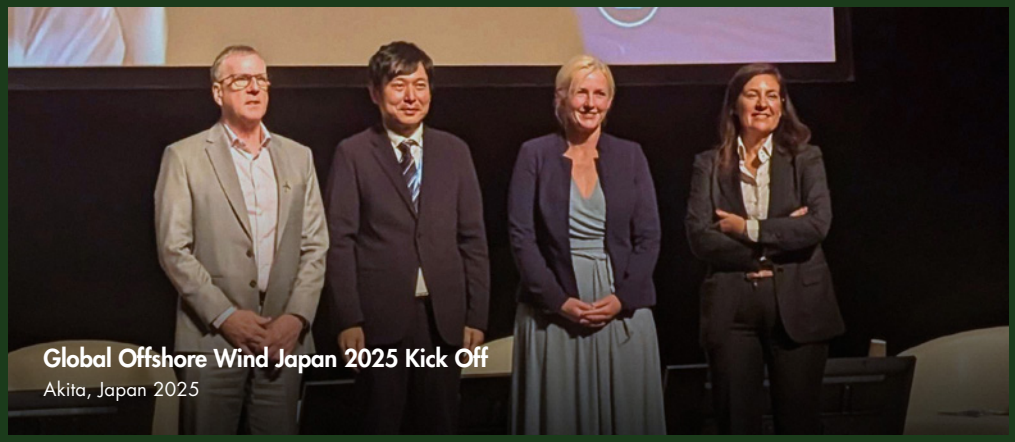
In August 2025, GWEC welcomed the launch of Japan's second Vision for the Offshore Wind Power Industry, outlining a new and revised roadmap to strengthen the country's floating offshore wind industry and advance technology, manufacturing and standards.

In November 2025, GWEC published a white paper looking into the challenges the Japanese market is facing and how to solve them.The paper, produced in partnership with renewable energy consultancy OWC, outlined both short-and-long-term recommendations to strengthen Japan's offshore wind framework across three key areas: auction design, offtake mechanisms, and other market bottlenecks.

"The Japan Wind Power Association (JWPA) successfully and jointly hosted the Global Offshore Summit with GWEC in Akita city in October 2025 with more than 700 participants from all over the world. JWPA values GWEC's efforts and contribution and we are grateful for its diligent whitepaper, Unlocking Japan's Offshore Wind Potential, which correctly advocated short-term and long-term recommendations for the enhancement of offshore wind industry in Japan. The relationship between our two associations has been strengthened and become closer since the appointment of GWEC's first Japan Country Manager, and we are looking forward to continuing bilateral collaboration."

- Junichi Tsuruta,
Managing Director, Japan Wind Power Association

Mark Hutchinson, Director, Asia at GWEC
At the 2025 Global Offshore Wind Summit-Japan (GOWS-J)



Global Offshore Wind Japan 2025 Kick Off
Akita, Japan 2025

EVENT

GLOBAL OFFSHORE

GWEC co-organised the Global Offshore Wind Summit-Japan, held in Akita between 15 and 17 October 2025, with the Japan Wind Power Association (JWPA). The summit is the country's leading offshore wind power event aiming to significantly expand offshore wind power and strengthen Japan's industrial base.

EAST ASIA AND PACIFIC

FEATURED COUNTRIES

South Korea

South Korea is seen as one of the most promising offshore wind growth markets in the APAC region.

Under the country's 11th Basic Energy Plan, the South Korean government aims to increase the share of renewables with a target of achieving 14.3 GW in offshore wind by 2030. As of late 2025, there were 102 offshore wind projects that had been issued electricity business licenses, representing a pipeline of just over 35 GW.

GWEC has been actively supporting offshore wind development in South Korea since 2023, helping position the country as an important regional player. Seeking to deepen this engagement, in 2025 GWEC appointed its first South Korea Country Manager to lead strategic research and stakeholder engagement.

Our team works closely with the Korea Wind Energy Industry Association (KWEIA), Offshore Energy Pathway (OEP) and other organisations to foster collaboration, align policy frameworks, and accelerate the deployment of offshore wind projects in South Korea.

In recent years, GWEC has published two influential studies exploring challenges and opportunities for offshore wind development in South Korea:

- How Offshore Wind Development Can Support Coastal Regeneration – presenting global best practices and actionable recommendations for revitalizing coastal communities.
- Exploring Coexistence Opportunities for Offshore Wind and Fisheries in South Korea – offering strategies to balance wind development with marine ecosystem protection and sustainable fisheries.

These initiatives reflect GWEC's commitment to fostering inclusive, environmentally responsible and economically beneficial offshore wind development in South Korea. By leveraging global insights and regional collaboration, GWEC continues to support South Korea's journey toward a resilient and sustainable energy future.

"The Korea Wind Energy Industry Association (KWEIA) has enjoyed working with GWEC since 2023. From GWEC's support for Korea's emerging offshore wind industry sector to their guidance as Korea explores new opportunities, KWEIA has been grateful for GWEC's expertise and the access they provide to the global wind industry."

- Deokhwan Choe,
General Manager of the Korea Wind Energy Industry Association (KWEIA)

GWEC's APAC Wind Energy Summit, hosted in South Korea in November 2024, set the stage for a major forthcoming policy and regulatory milestone when, in February 2025, South Korea's National Assembly passed the Offshore Wind Power Promotion Act.

An historic piece of legislation supported and welcomed by GWEC, the Act sets out a national framework to facilitate new offshore wind projects, with the main provisions expected to take effect by March 2026.

Following its passing, in April 2025 Sinan-gun county in South Jeolla in southwestern Korea was designated as the first official offshore wind zone. In addition, a fixed tariff auction roadmap was put in place for 2024-2026, targeting 7-8 GW of capacity.

Official opening of APAC Summit 2024
Incheon, South Korea

H.E. Woo Won Shik, Speaker of the National Assembly of the Republic of Korea

EVENT

APAC WIND ENERGY SUMMIT 2024

In November 2024, South Korea played host to GWEC's second APAC Wind Summit, which brought together industry leaders, policymakers, and stakeholders from across the region.

The summit served as a platform for collaboration, knowledge exchange, and alignment on offshore wind strategies across the region, reinforcing South Korea's leadership in the energy transition.

SOUTH AND SOUTHEAST ASIA

FEATURED COUNTRIES

India

India is one of the world's largest wind markets with over 50 GW of domestic installed wind capacity. Over the past two decades, the country has built a robust industrial[21] manufacturing base and supply chain and strengthened its status as an important exporter of wind technology. This has the potential to lead to a period of unprecedented growth, with annual wind installations predicted to hit 6 GW in 2025.

Since GWEC's establishment in 2005, our team has been engaged in supporting and advising on the development of India's policy and regulatory framework, working in close collaboration with the Indian Wind Turbine Manufacturers Association, one of its founding members.

Since 2010, GWEC has been publishing a dedicated India Outlook Report that presents local market trends and clear recommendations for decision makers in business and government.

GWEC's first Secretary-General, Steve Sawyer, led the association's efforts to help identify opportunities for developing an Indian offshore wind industry, promoting the idea at conferences including the Delhi International Renewable Conference in 2010 and WindPower India in 2011.

[21] GWEC Wind at The Core: Driving India's Green Ambition Report 2025

GWEC advocated for the development of a roadmap for India's offshore wind sector, leading to the launch of a four-year project in collaboration with the Indian government and Ministry of New & Renewable Energy and State governments, supported by the European Union's Indo-European Cooperation on Renewable Energy programme.

The GWEC-led FOWIND (Facilitating Offshore Wind In India) consortium published pre-feasibility studies for developing offshore wind in the states of Gujarat and Tamil Nadu in 2015 and a final set of feasibility reports in 2018, setting out a path forward for the development of the country's offshore wind sector.

Strengthening Dialogue between Industry and Government

Building on this early engagement, in 2020, GWEC's team under CEO Ben Backwell established GWEC India as a dedicated advocacy and research initiative with the objective of promoting sustainable wind energy development. As a locally incorporated non-profit organisation, GWEC India is advancing the country's wind energy agenda, supporting industry collaboration and capacity-building.

In recent years, GWEC India established two working groups for onshore and offshore wind to support members and strengthen dialogue between local industry and national regulatory agencies, resulting in a series of technical workshops and roundtable trade discussions, and the development of studies and collaborative research projects.

GWEC's interventions have been geared around creating greater understanding about the integration of wind and other renewable power sources to reduce system costs and optimise transmission, while working with state governments to speed up deployment and reach more than 10 GW of annual installations required to meet India's ambitious growth targets.

In December 2022, GWEC along with the Government of Tamil Nadu and Deloitte, launched a new Wind Energy Roadmap for the state of Tamil Nadu funded by SED. This report complemented the state government's efforts to decarbonise power generation, mitigate climate change and create green jobs.

When India hosted world leaders for the G20 in May 2023, GWEC was part of Think20 (T20), an official engagement group, advising on the final G20 Leaders statement which endorsed global efforts to triple the world's renewable energy by 2030. In addition, GWEC took part in the 14th Clean Energy Ministerial in July 2023, promoting bilateral wind energy trade activities and clean energy initiatives.

"For two decades, GWEC has been the unifying global voice that transformed wind energy from a niche aspiration into one of the world's most strategic drivers of climate action, energy security, and industrial growth. By shaping policy frameworks, building new markets, and mobilizing international partnerships, GWEC has helped expand global wind capacity more than twenty-fold and placed wind at the center of the energy transition. As we enter the next era, GWEC's role is more critical than ever—championing fair markets, resilient supply chains, and the rapid scale-up needed to power a cleaner, safer, and more equitable world, delivering affordable power for all."

- Girish Tanti,
Vice Chair, GWEC

In 2025, GWEC worked closely with industry and government to advocate against the imposition of higher taxes on wind manufacturing. This involved conducting a closed-door roundtable meeting with senior representatives of wind sector manufacturers and advocating on their behalf with the federal government.

Increasing India's global competitiveness

The Indian government is today targeting 100 GW from wind power including 30 GW from offshore wind, by 2030. According to GWEC's Wind at The Core: Driving India's Green Ambition report, published in August 2025, with the right financial incentives and policy measures there is potential for the country to reach 452 GW by 2050. Achieving this ambitious target however will require strong policy support around the role of Renewable Purchase Obligations and accelerated grid development .

In support of this policy agenda, GWEC is advising national and local stakeholders on how to build India's global competitiveness through strengthening its skilled workforce and creating strong local supply chains for both domestic demand and the global wind supply chain.

Recognising that the Indian state of Tamil Nadu is in pole position to be a major player in the country's clean technology growth story, GWEC India initiated and supported a recent report by Ocean Energy Pathway and engineering consulting firm COWI.

GWEC has additionally worked closely with Earth Journalism Network to support community-driven climate communication and promote factual, solutions-oriented storytelling to bridge the gap between climate science, policy, and public understanding.

GWEC will continue to play a catalytic role in facilitating knowledge transfer and collaborating with local industry associations and diplomatic trade missions, assisting India in its energy transition.

'Wind at the Core' report launch in Delhi, India
GWEC Vice Chair, and India Chair, Girish Tanti, MNRE Secretary Kumar Sarangi, and GWEC CEO Ben Backwell

EVENT

INDIA WIND ENERGY MARKET OUTLOOK 2025

GWEC's report, The Wind at the Core: India Wind Energy Outlook, charts India's path to achieving 107 GW+ in wind capacity by 2030. Launched in August 2025, the publication aims to help unlock India's role as a global wind export hub, setting out the actions needed to fast-track deployment.

With installations projected to hit a record 6 GW in 2025 and rising to 10GW or more over the coming periodIndia's wind sector is entering a period of unprecedented growth. Yet, to keep pace with rising demand, annual installations must climb to 10GW and beyond. The report sets out the pivotal role of wind energy in powering India's green growth and energy security. It shows how wind, deployed alongside solar PV and batteries, can meet India's fast-growing demand in the most cost-effective way.

The roadmap presented charts the path from today's 52 GW by tackling challenges around PPA signings and grid development. The report also shows how India can become a global export hub – with potential to supply 10% of the world's wind energy equipment by 2030.

SOUTH AND SOUTHEAST ASIA

FEATURED COUNTRIES

Philippines

GWEC has been pivotal in accelerating the Philippines' offshore wind journey, turning global interest into concrete policy reform and genuine market confidence. The country now stands to become the first emerging developing economy in Asia Pacific to build out its offshore wind industry at scale.

Our team has been actively engaged in the country since 2022, when the Department of Energy in partnership with the World Bank Group, produced the country's first Offshore Wind Roadmap. This landmark roadmap ignited high-level political will and unlocked investor appetite, leading to the award of more than 90 offshore wind service contracts, representing a massive 69 GW of potential capacity.

Building the right conditions for offshore wind

By convening government agencies, developers, financiers, and civil society in dedicated workshops and forums such as the Offshore Wind Technical Working Group, GWEC created trusted discussion spaces to address critical challenges in permitting, marine spatial planning, and auction design.

These consultations have built consensus, shaped reforms to streamline processes, and ensured that community voices remain at the heart of decision-making. In this way, GWEC's most significant contribution has been to provide the collaborative platform that turned ambition into action.

GWEC's interventions have had a direct impact on shaping the Philippines' route-to-market for offshore wind, ensuring its inclusion in the Green Energy Auction Programme. This milestone auction, launched in June 2025, provides the long-term revenue certainty that investors require while signalling the government's commitment to scaling the sector.

Complementing this, GWEC released dedicated Finance Paper and Auction Terms of Reference parameters that outlined practical risk-sharing mechanisms and convened roundtables with local and international banks. Together these efforts have shifted the national conversation from how risks can be shared to unlocking investment. The government has since adopted the majority of the industry positions drawn from these series of interventions.

"Drawing on their respective networks and resources, GWEC and the Wind Energy Developers Association of the Philippines worked closely with stakeholders and held constant consultations with government to develop new, innovative mechanisms to make the country's first Green Energy Auction for offshore wind a more financeable framework. With a reasonable bidding reserve price, the success of the auction will be due in no small part to the open collaboration among the government and the wind industry, represented by GWEC and WEDAP."

- Poch Ambrosio,
President, Wind Energy Developers Association of the Philippines

Wind Energy Developers Association of the Philippines President Poch Ambrosio
GAP Summit, Lisbon, Portugal, 2025

REPORT

RISK SHARING FOR FINANCING OFFSHORE WIND

In September 2025, GWEC together with Climate Smart Ventures published the report, Financing the Offshore Wind Revolution: Risk-Sharing Mechanisms for a Sustainable Energy Future in the Philippines. Launched at the APAC Wind Energy Summit in Melbourne Australia, the paper focuses on how policy, contract design, and tariff structures can unlock long-term investment.

Drawing from global experience and position from the Philippines Offshore Wind technical working group, the report outlines mechanisms to balance risks between developers and the state – such as indexation, lender step-in rights, and streamlined permitting coordination.

GWEC and Climate Smart Ventures
At the Paper Release on Risk-Sharing Mechanisms for Offshore Wind

POLICY

SHARING PERSPECTIVES BETWEEN GOVERNMENT AND INDUSTRY

In September 2025, GWEC met with the new Chair of the Philippines Energy Regulatory Commission (ERC), Nino Juan, to exchange perspectives on how the country's regulatory framework can continue to play a central role in harnessing the country's offshore wind resources and enabling the country's energy transition.

The meeting was organised with colleagues from the Philippine Offshore Wind Technical Working Group, the Wind Energy Developers Association of the Philippines (WEDAP), and Philippine Offshore Wind Energy Resources (POWER). It reaffirmed a shared commitment to fostering close collaboration between industry and government, building a robust, transparent, and enabling regulatory framework to accelerate offshore wind deployment.

GWEC Asia meeting with the Philippines Energy Regulatory Commission's new chair, Nino Juan
Manila, Philippines, 2025

Inclusive wind power development

Beyond policy and finance, GWEC developed a socio-economic impact and coastal development study for the Philippines which helps to quantify the potential for new jobs, skills development, and community benefits, building the case for offshore wind as a driver of inclusive growth.

In parallel, GWEC's supply chain studies have identified opportunities in shipbuilding, fabrication, workforce and logistics where the Philippines can capture industrial value and how port investments will provide pathways for the private sector to contribute to infrastructure development.

Together, these interventions have provided government and industry leaders with a clear vision of how offshore wind can regenerate coastal economies and anchor local industries in global supply chains.

The cumulative effect of sector-wide interventions is now visible: foreign ownership restrictions for renewables have been lifted, permitting is being digitised and the Philippines is emerging as one of the most dynamic new offshore wind markets in Asia Pacific.

GWEC's next focus in the Philippines is on building community trust, strengthening social acceptance, and ensuring offshore wind delivers inclusive benefits for coastal populations.

SOUTH AND SOUTHEAST ASIA

FEATURED COUNTRIES

Vietnam

GWEC has played a central role in shaping Vietnam's wind power journey, advocating for the development of clear targets and regulatory frameworks for onshore and offshore wind and supporting the sector's growth in alignment with national socio-economic and environmental goals.

Since 2018, GWEC has engaged with the Ministry of Industry and Trade, Ministry of Finance, Central Economic Commission and Prime Minister's advisory groups, among other state agencies and local stakeholders. GWEC has provided technical advice to ease policy implementation and shared international experience on competitive investor selection models.

Attracting Investment into Vietnam's Wind Sector

GWEC acts as a bridge linking global investors with the Vietnamese market, supporting green investment mobilisation, energy transition and carbon emission reduction.

The first ever Vietnam Wind Power conference was organised by GWEC in June 2018, in partnership with the Ministry of Industry and Trade, GIZ and the Danish Embassy, bringing together leading wind power companies and local stakeholders to explore challenges and opportunities in developing the wind sector.

At this inaugural conference, GWEC presented a list of recommendations to help Vietnam raise its wind capacity from 197 MW then to 800 MW by 2020, such as simplifying the project approval process and bringing forward grid infrastructure planning and development.

GWEC has since organised multiple editions of the Vietnam Wind Power conference and established a permanent presence in Hanoi, enabling close coordination with the government, the National Assembly, Vietnam Electricity, PetroVietnam, provincial authorities, and international development partners.

Creating a Regulatory Framework for Future Growth

A defining moment came at COP26 in 2021, when GWEC and global wind leaders met with the Prime Minister of Vietnam. Vietnam's decision to make a net zero commitment and support COP26's Global Coal to Clean Power Transition Statement had an immediate and positive impact on the direction of Vietnam's energy policy, reinforcing higher renewable energy ambition.

In 2022, GWEC put forward a strategy for creating an offshore wind sector in Vietnam with the publication of a landmark report on the Route to Market for Offshore Wind Development. This was the first comprehensive roadmap outlining procurement pathways, site allocation options and risk-sharing frameworks to guide Vietnam's early offshore wind market design.

This high-level engagement by GWEC was instrumental in establishing a 6 GW by 2030 target for offshore wind in the country's Power Development Plan (PDP8), announced in May 2023.

At COP28 in 2023, the GWEC team co-organised a Vietnam Business Forum co-chaired by the Prime Minister of Vietnam and GWEC CEO Ben Backwell to strengthen public-private dialogue on climate finance and the energy transition. GWEC facilitated a set of government study tours to the EU, UK, Australia and South Korea, supporting Vietnam's policymaking on offshore wind supply chains and port readiness.

In 2024, GWEC delivered a Vietnam Offshore Wind Competitive Investor Selection Study, proposing a two-stage competitive investor-selection model for offshore wind. In the first stage, investors receive exclusive survey rights within pre-zoned areas under the National Marine Spatial Planning framework to conduct resource and site studies. The second stage sees a competitive auction for project development and long-term PPAs. This approach is expected to build a project pipeline, reduce development risk and cost, and facilitate a fair, transparent process that attracts qualified investors and sustainable financing to Vietnam.

In April 2025, Power Development Plan 8 was further revised to include an updated 6-17 GW target for 2025-2030, and in September 2025, the government subsequently confirmed it was adopting the new two-stage model for offshore wind at GWEC's APAC Wind Summit in Melbourne.

GWEC CEO Ben Backwell and Prime Minister of Vietnam H.E Pham Minh Chinh
Meeting at COP28, in the UAE

05 GWEC IN LATIN AMERICA

GWEC
in Latin America

Regional Context

Harnessing the abundant wind resources of Latin America and the Caribbean (LAC) is critical to the region's energy transition and diversifying a power mix which remains reliant on fossil fuels.

Although the LAC region generates just 10% of global greenhouse gas emissions, it already suffers some of the most serious negative impacts from climate change. Between 1998 and 2020, climate-related events and their impacts reportedly claimed more than 312,000 lives and affected more than 277 million people in LAC[22].

At the same time, energy access remains a serious concern, with 17 million people without access to electricity according to the Economic Commission for Latin America and the Caribbean (ECLAC)[23].

Over the past 15 years, wind power has grown rapidly across the LAC region. In 2010, wind energy was barely seen in the electricity matrix, but it has since increased dramatically, accounting for around 80% of all non-conventional renewable energy installed capacity in the region[24].

GWEC LATAM
GLOBAL WIND ENERGY COUNCIL

[22] IEA Latin America Energy Outlook 2023

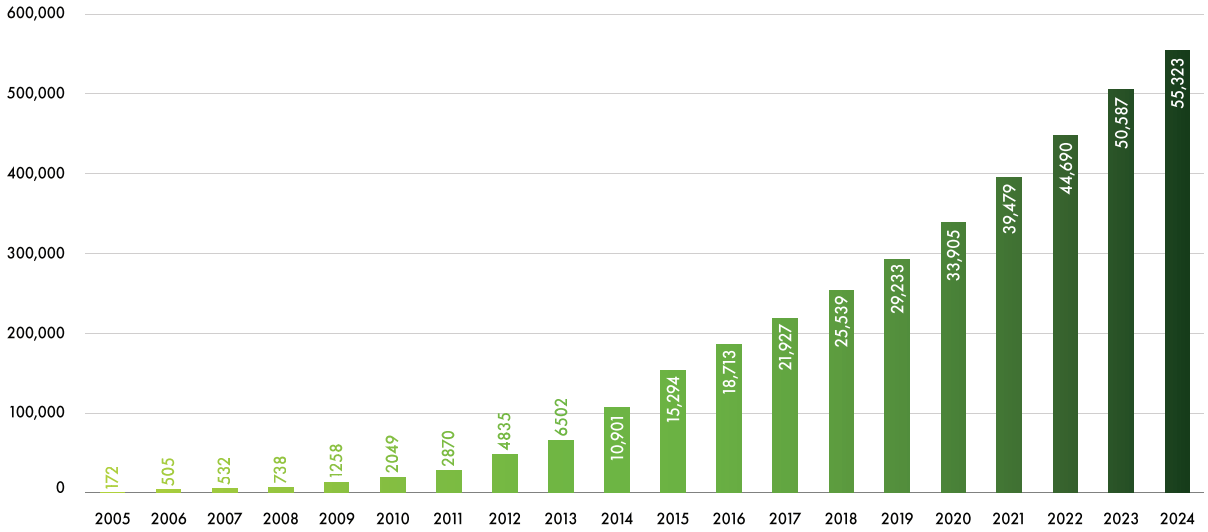
[23] ECLAC Briefing Note 2022

[24] OLADE-GWEC 2018

LATIN AMERICA & CARIBBEAN 2005-2024

Cumulative Wind Installed Capacity (MW)

Source: GWEC Market Intelligence



Latin America was the fourth-largest wind market in 2024, according to GWEC's 2025 Global Wind Report, with Brazil in the top five for new installations[25]. Despite recent growth, however, there is growing uncertainty across several of the region's markets, raising the risk of a potential downturn in orders for wind turbines.

GWEC Market Intelligence predicts that annual installations in LAC will continue to decline in the immediate term as major markets such as Brazil face challenges such as lower-than-expected electricity demand, grid transmission constraints, as well as the end of discounted transmission tariffs for renewable operators.

[25] GWEC Global Wind Report 2025

Countries in the region which have already established renewable energy markets are seen as underperforming, particularly in the cases of Brazil, Argentina and Mexico. In Brazil, industry is understood to be concerned about potential supply chain issues due to slowing demand, while a perceived lack of political support in Mexico has impacted both public and private sector investment in renewable energy.

Some countries, such as Colombia and Peru and some in Central America, are moving more slowly in opening markets for wind power, while others like Bolivia, Ecuador, and small island states in the Caribbean are further away from embracing wind as a significant share in their electricity mix.

GWEC Latin America President Ramón Fiestas
At La Semana de la Energía, Chile, Argentina, 2025

GWEC CEO Ben Backwell
At Brazil Wind Power, São Paulo, Brazil, 2025

(l-r) Andre Pepiton, CFO, Itaiu Binacional, GWEC's Policy Director Brazil, Roberta Cox, Former Senator Jean Paul Prates and Darlan Santo, President of Cerne
at Brazil's National Energy Forum

Our Approach

GWEC, working in collaboration with local wind energy associations across the LAC region, advocates for open and transparent renewable energy policies and streamlined regulations that help to eradicate market barriers and attract investment.

Together with our partners, GWEC shares industry knowledge and experiences with governments on how to build fast and effective permitting regimes as well as supportive frameworks to accelerate wind energy investments. This approach recognises that increasing the competitiveness of the wind sector is a powerful driver to strengthen electricity market and systems and frameworks.

We work closely with national wind and renewable energy associations and regional institutions including the Latin American Energy Organization (OLADE), the Inter-American Development Bank (IDB), the Regional Electrical Integration Commission (CIER), the Latin America Energy Regulators Association (ARIAE) and the Economic Commission for Latin America and the Caribbean (ECLAC).

Recognising that gaining social acceptance has been identified as a major priority in the region, GWEC has been developing policy guidance rooted in local experiences and best practices from countries in the region to help ensure wind power projects can proceed de-risked having won community support.

In addition, we are advising our partners on the workforce and employment capabilities required in the region to ensure supply chains are well established and strategically aligned to support national and regional targets.

Our regional engagement extends to exploring ways that industry and government can help to close gender gaps across the sector through GWEC's Women in Wind initiative.

In recent months, GWEC has also undertaken extensive research and stakeholder engagement to develop a regional supply chain study for LAC, following a similar successful model developed for the APAC region.

GWEC
LATIN AMERICA WORK FORCE

GWEC's Latin America Task Force brings together leading industry experts operating in Latin America. It was created to provide expert knowledge on the region's wind energy market and encourage its further development.

gwec.net/policy/taskforces/latinamerica

Ben Backwell addresses a Public Hearing on the Regulation of the Legal Framework for Offshore Electricity Generation
Brasilia, Brazil, 2025

POLICY

GWEC PRESENTS AT BRAZILIAN PUBLIC HEARING ON OFFSHORE WIND

GWEC CEO Ben Backwell addresses a Public Hearing on the Regulation of the Legal Framework for Offshore Electricity Generation, held at the Chamber of Deputies in Brasília, in October 2025.

Ben was joined by Jean-Paul Prates, President of the Center for Strategies in Natural Resources and Energy, and Lorena Melo Silva Perim, Programme Director of the National Secretariat for Energy Transition and Planning of the Ministry of Mines and Energy.

Discussion centred on the timetable for Brazil's offshore wind regulations including defining area selection and environmental licensing processes, as well as the need for ensuring investor confidence and accelerating project delivery.

GWEC CEO Ben Backwell, COP30 President Andre Correa do Lago, and Brazil Policy Director Roberta Cox
At the CNN COP30 Talks

Our Impact

Since GWEC first became active in LAC in 2007, our team has played a leading role in the development and establishment of national wind power policy frameworks across the region in countries such as Brazil, Mexico, Chile, Uruguay, Argentina and Colombia.

GWEC's strategic policy engagement in the LAC region has helped to open new markets for wind power across both onshore and offshore wind. Our targeted engagement has also encouraged policymakers to raise their level of ambition and develop a regulatory framework which incentivises investment in wind power.

GWEC's signature achievements in the region include action to support Brazil and Colombia in the development of their national regulatory frameworks for offshore wind energy.

In recent years, GWEC has also developed and published policy guidance for governments and stakeholders in the region on how to secure broad social acceptance for renewable energy projects through inclusive, transparent and culturally sensitive stakeholder engagement, addressing the concerns of local communities and ensuring their meaningful, long-term involvement in the development process.

By sharing international best practices with government and regulators to inform the development of national roadmaps and early-stage legislation, the GWEC team has successfully complemented the joint efforts of industry and supply chain businesses, national associations such as ABEEólica in Brazil, and international institutions such as the World Bank.

Collectively this sustained engagement in the region is helping to de-risk wind energy projects and improve the investment case for renewable energy.

Major LAC Policy Outcomes (2020-2025)

2020

2021

Brazil reaffirms wind as strategic energy resource in Decennial Plan

2022

Argentina surpasses 3 GW wind capacity under RenovAr programme

2023

LAC region surpasses 50 GW installed wind capacity milestone

At COP28, LAC countries commit to triple global renewable capacity by 2030

2024

Colombia approves offshore wind roadmap and launches first seabed auction

2025

Brazil's President signs landmark new offshore wind law

Mexico reopens energy sector for quotas of private investments

Landmark COP30 climate summit in Belém, Brazil

In recognition of the growing climate emergency in the LAC region, GWEC's 2030 goal is to position wind energy as an essential solution to accelerate a clean and just energy transition. The GWEC team will continue to partner with governments, regional institutions and civil society, as well as GWEC's members and philanthropic partners to establish and secure viable markets for wind energy.

Attracting private capital will be critical to deliver on new government wind power targets, for which issues such as high financing costs, political and regulatory instability and limited domestic credit capacity still need to be overcome. This requires supportive policies and tailored solutions for emerging technologies such as offshore wind.

"It is a great satisfaction for us at ABEEólica to have GWEC as a strategic partner in our journey towards the sustainable expansion of wind energy in Brazil and the world. GWEC has been a fundamental ally in promoting a global dialogue on a just energy transition, connecting experiences, data and best practices that strengthen the sector on all continents."

- Elbia Gannoum,
CEO of ABEEólica and Co-Vice Chair of GWEC

POLICY

OLADE AND GWEC: BUILDING POLITICAL MOMENTUM ACROSS LATIN AMERICA

GWEC represented the global wind sector at OLADE's 10th Energy Week and the annual meeting of Energy Ministers of Latin America and the Caribbean in Santiago, Chile, between 30 September and 3 October 2025.

During the summit, governments from across the region reaffirmed their commitment to a just, inclusive and sustainable energy transition, through strengthening regional cooperation, leveraging the political and technical dialogue and projecting LAC as a regional leader in clean energy.

"GWEC's meetings with energy ministers, multilateral regional development banks and regional institutions had a common thread: Electrification of the region is an unstoppable trend and competitive advantage for the region, but there is a need to capitalise on this opportunity," reflected Emerson Clarke, GWEC Chief Policy Officer.

The GWEC team also attended a side event to discuss regional coordination on climate and energy and the just transition on the road to COP30 with government ministers and regional institutions. Ramón Fiestas Hummler, GWEC's Latin America and Caribbean President, and Natalia Oliveira, GRA's Regional Lead, spoke about how the renewable industry can support a just and inclusive energy transition while addressing key enablers such as investment in grids and community acceptance.

As keynote speaker in a session on 'Strategic Value Chains for the Transition In LAC', Ramón also shared initial findings from GWEC's LAC Supply Chain study, highlighting pathways for industrial decarbonisation and the role of offshore wind in Brazil's energy future.

GWEC Team at OLADE's 10th Energy Week
Santiago, Chile, 2025

GWEC's Latin America President about to speak at OLADE Energy Week
Santiago, Chile, 2025

"LAC needs to double its share of wind energy installed capacity by 2030 just to keep on the path of the NDCs," he said. "The region is facing a challenge in reaching this target however and needs to address key barriers to wind industry growth in grid, permitting, and demand creation."

The OLADE summit showcased the power of collaboration, policy dialogue, and strategic vision to strengthen the region's leadership in renewable energy.

Action in 2025

Latin America

Brazil's New Offshore Wind Regulatory Framework

In January 2025, GWEC welcomed Brazil's introduction of a new regulatory framework for offshore wind. The legislation, approved by Brazilian President Luiz Inácio Lula da Silva, paves the way for new offshore wind projects by outlining procedures for forthcoming auctions including a technical qualification process.

Supply Chain Workshop in Mexico

GWEC in collaboration with AMDEE worked to re-engage the new Mexican government to support the recovery of the country's wind energy market and rebuild investor interest.

Government of Chile Joined GOWA

GWEC welcomed Chile becoming the latest member of the Global Offshore Wind Alliance in July 2025. This followed GWEC's participation in the Chilean Clean Energy Investment Forum in collaboration with the Inter-American Development Bank (IDB).

Gender Inclusion in Climate Policymaking

In August 2025, GWEC's Women in Wind initiative joined the Brazil National Energy Gender Equity Pact. The pact calls for gender representation in climate and energy decisions, incorporating gender and race indicators into energy transition policies, applying a gender justice approach to combating energy poverty, promoting the employability of women, and strengthening women's networks.

GWEC Urges Stronger Wind Ambition at OLADE

In September and October 2025, GWEC joined the annual meeting of Energy Ministers of Latin America and the Caribbean at the Latin American Energy Organization (OLADE), where governments across the region reaffirmed their commitment to wind power and supporting a just, inclusive and sustainable energy transition.

Latin America Energy Regulators Meeting

GWEC's President, Latin America, Ramón Fiestas Hummler, addressed a meeting organised by Latin America Energy Regulators advocating for the modernisation of market and system rules for variable energy sources and promoting greater regional coordination in long-term electricity planning.

Strengthening Latin America's supply chain

During 2025, GWEC undertook extensive regional research and stakeholder engagement to develop a regional supply chain report for LAC, following a similar successful model developed for the APAC region. GWEC worked with ERM on this report, launched in November 2025, to map the region's onshore and offshore supply chains, identify bottlenecks, and outline key actions to enable a clean, competitive, and locally rooted wind industry.

Supply Chain Workshop in Colombia

In Bogotá, GWEC worked with Colombia's Ministry of Mines and Energy to revitalise interest in offshore wind and large-scale renewable energy projects and boost confidence in long-term capital intensive investments among international investors.

Brazil's First Ever Bational Energy Forum

In September 2025, GWEC's Policy Director for Brazil. Roberta Cox, spoke at the First National Energy Forum in Brasilia, engaging with stakeholders about the future potential of offshore wind in Brazil's energy mix.

Brazil's Timetable for Offshore Wind Leases

In October 2025, during a public hearing on the Regulation of the Legal Framework for Offshore Electricity Generation in Brasília, GWEC CEO Ben Backwell joined representatives from government and industry to discuss the timetable for defining area selection and environmental licensing processes, and the need to ensure investor confidence and accelerating project delivery.

Brazil Wind Power Mobilises Wind Sector

In October 2025, ABEEólica and GWEC co-organised Brazil WindPower, the largest wind energy event in Latin America. Taking place in in Sao Paolo, the conference and exhibition brought together around 6,000 attendees including national and international representatives to discuss current opportunities for growing the industry in Brazil.

Leaders Commit to Climate Action in Belém

In November 2025, Brazil hosted the historic COP30 climate conference in Belém. As one of the founder members of the GRA, GWEC directly engaged with the Brazilian Presidency to ensure renewable energy was reflected in the summit's agenda and supported the roadmap to transition away from fossil fuels.

GWEC's Brazil Policy Director, Roberta Cox
Speaking at Brazil WindPower in São Paulo in 2025

LATIN AMERICA

FEATURED COUNTRIES

Brazil

For a country which is heavily reliant on a mix fossil fuels, biofuels and hydropower, Brazil has made important strides over the past decade in developing its wind power sector, helping to build a more diverse, secure and climate resilient energy mix.

With more than 1,100 wind farms now installed across Brazil, the country's wind power capacity had reached 33.7 GW by the end of 2024, according to GWEC. Installed capacity increased with 3.3 GW of additions. By 2032, wind installed capacity is expected to reach 56 GW.

In addition, Brazil has enormous potential to develop its offshore market. According to the World Bank report, Offshore Wind Development Program: Scenarios for Offshore Wind Development in Brazil, Brazil boasts a technical generation potential of 1,200 GW including 480 GW from fixed-foundation technology and 748 GW from floating-foundation technology.

For many years, through advocacy, developing partnerships, and showcasing innovation across the sector, GWEC has supported ABEEólica, the Brazilian Wind Energy Association, in advising national stakeholders on how to support the growth and development of Brazil's onshore wind sector while advocating for a new regulatory framework to create a future offshore wind market.

Since 2007, GWEC has worked strategically with the Brazilian government to implement important initiatives including identifying supply chain gaps and bottlenecks, identifying key fundamentals for wind energy investments, and introducing policies including a framework proposal for the development of wind power.

GWEC partnered with ABEEólica in 2011 on a project funded by REEEP to launch an Analysis of the Regulatory Framework for Wind Power Generation in Brazil. This year also marked the beginning of the Brazil Wind Power Conference & Exhibition series which the two organisations have been running ever since.

In recent years, GWEC has played a significant role advocating for the onshore wind industry and working on the development of a new regulatory framework to

harness the country's significant offshore wind resources. In 2021, Brazil reaffirmed wind as a strategic energy resource in the country's Decennial Plan.

In January 2025, GWEC welcomed the introduction of Law No. 15.097/2025 which creates the regulatory framework for offshore wind. Approved by Brazilian President Luiz Inácio Lula da Silva, the legislation sets out procedures for forthcoming auctions including a technical qualification process.

"This is a historic moment for Brazil," commented GWEC Policy Director for Brazil, Roberta Cox. "The regulation of offshore wind power positions the country at the centre of the global energy transition and delivers a unique opportunity to build an industry which will be a key pillar in modern Brazil."

"GWEC's tireless work in defence of renewable energies directly contributes to our ability to advance more robust public policies, attract investments, and consolidate Brazil's role as a leader in clean energy. This partnership inspires us to continue expanding the participation of wind power in the electricity matrix, generating jobs, innovation, and regional development. The joint work between GWEC and ABEEólica reaffirms that international cooperation is essential to accelerate the sustainable future we want to build."

- Elbia Gannoum,
CEO of ABEEólica and Co-Vice Chair of GWEC

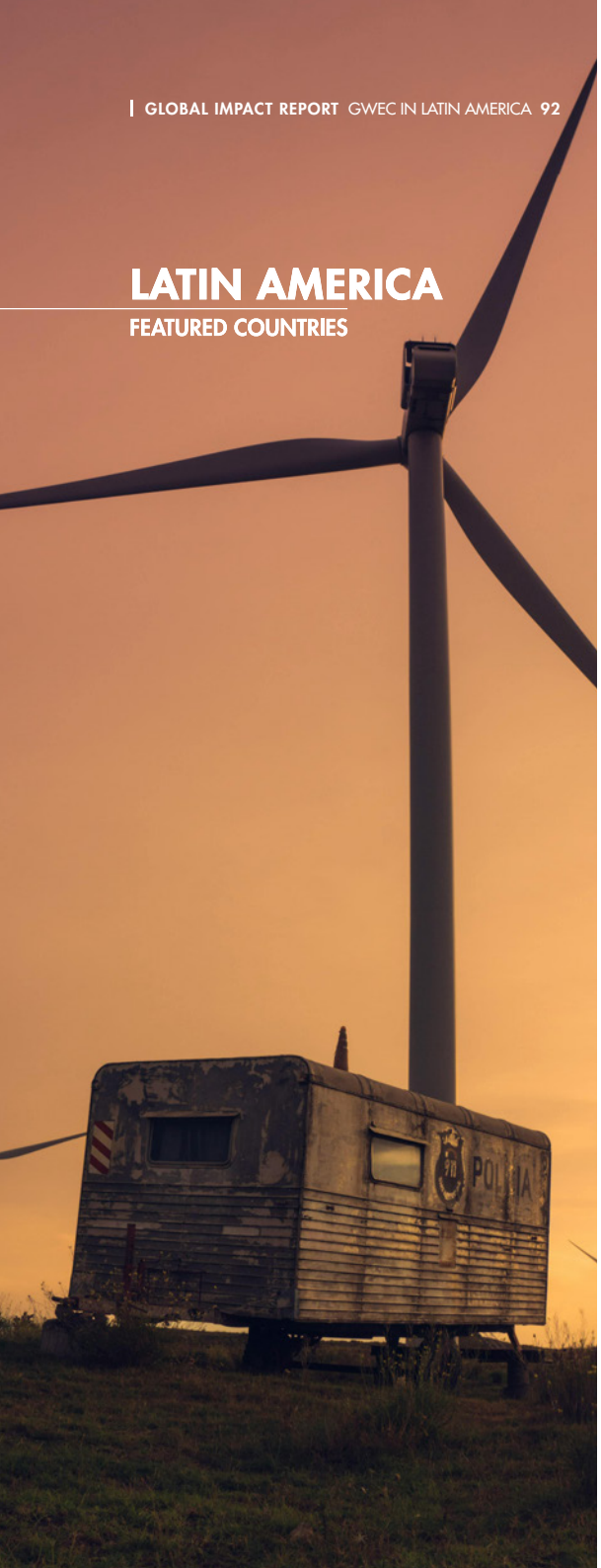
AWARD

GWEC'S CEO HONOURED WITH GLOBAL WIND AMBASSADOR AWARD

Ben Backwell was given the Global Wind Ambassador Award at the opening ceremony of Brazil Wind Power 2025. The award was presented by Elbia Gannoum, CEO of ABEEólica, who serves as Special Energy Envoy for COP30, in recognition of Ben's continued hard work, passion and legacy in the wind energy sector.

Elbia Gannoum, Abeeolica CEO, and Laura Porto, Neoenergia Executive Director, presented Ben Backwell with his Global Wind Ambassador award
São Paulo, Brazil, 2025

Elbia Gannoum, ABEEolica CEO and COP30 Energy Envoy
At the Brazil Wind Power Event Opening



LATIN AMERICA

FEATURED COUNTRIES

Argentina

GWEC has played an active role in contributing to the development of Argentina's regulatory framework for wind power, supporting the government to identify ways to increase investment in the sector. GWEC's engagement is supported by the regional Latin America Task Force which has proposed practical pro-business proposals for the development of national legislation and regulation.

In April 2016, the GWEC taskforce led an historic high-level policy mission to Buenos Aires to support the first round of tenders resulting from the introduction of a new renewable law and regulatory framework. The mission aimed to reinforce interest from international wind power companies and investors in the first and subsequent tender processes. GWEC later held its first wind power workshop for local stakeholders at the Stock Exchange Buenos Aires, helping to build political commitment on renewable energy support within the Congress, and paving the way for a funding mechanism and investments in the sector (RenovAr).

In 2018 and 2019, GWEC organised the Argentina Wind-Power Conference & Exhibition, which has contributed to building a local supply chain in Argentina.

Since the change of government in 2023 which brought in libertarian President Javier Milei, GWEC has been adapting its advocacy strategy in Argentina. This has involved GWEC's team taking part in bilateral and multilateral meetings and events with senior officials to highlight the competitiveness of wind energy as the cheapest source electricity.

In recent years, GWEC has engaged the current government, most recently meeting with the Sub-Secretary of Energy Planning at OLADE Energy Week in October 2025 in Santiago.

The GWEC team at Argentina Wind Power, 2018

GWEC CEO Ben Backwell opens the event in Argentina

GWEC CEO Ben Backwell with GWEC founder and General Secretary, the late Steve Sawyer
At Argentina Wind Power, 2018

"GWEC is a reliable partner in supporting the development of the renewable energy sector in Argentina, and for partnering with our Chamber to convey the messages and contributions that we in the sector consider essential to our regulatory authorities. With GWEC, we have the peace of mind that the broad umbrella of its international standing protects and supports us when we need it."

- Hector Ruiz Moreno,
General Manager, Chamber of Generators and Renewable Energy Value Chain, Argentina

LATIN AMERICA
FEATURED COUNTRIES

Colombia

GWEC has become increasingly engaged in Colombia over the past decade, working with the government and international institutions since 2013 on how to unlock the market to wind energy investment and boost domestic political support for renewable energy.

After the Colombian peace process concluded in late November 2016, GWEC identified an opportunity for improving the market environment for capital intensive infrastructure and addressing gaps and bottlenecks in the energy sector. Our team worked to gauge the industry's interest and helped to design a wind market strategy for La Guajira, the country's northern region.

In cooperation with the National Renewable Energy Association (SER-Colombia), GWEC advocated for the enactment of new energy policies to open the electricity market for renewable energy, including public consultations on integrating renewable energies into the grid and promoting long-term Power Purchase Agreements to enhance generation matrix resilience and competitiveness.

GWEC influenced the development of DECREE 570, shaping public policy for long-term renewable energy PPAs and supporting competitive auctions under Resolución 40791 for renewable energy allocation in the power market.

Building on GWEC's experience in other markets in the region, GWEC's team recommended the preparation of the first of a series of wind power technical seminars in Colombia. These workshops involving the country's regulatory authorities facilitated discussions addressing policy and regulatory issues, technical issues for participating in auction processes, as well as engineering, procurement and construction processes.

More recently, GWEC has been supporting the Government of Colombia in its offshore wind programme in collaboration with the World Bank and the Danish Energy Agency, as well as working with Ocean Energy Pathway on a social impact analysis for offshore wind.

In addition, GWEC has been engaging in a wind energy action plan with the government to address existing bottlenecks and barriers for wind energy developments in La Guajira, while working on a roadmap to promote support for wind energy in Colombia and in the wider region.

Mexico

Mexico has immense wind power technical potential, offering the country a reliable and secure source of clean energy generation.

GWEC first began operating in Mexico in 2009, when our team worked to strengthen cooperation with the country's main public and private stakeholders, researching key fundamentals for wind energy investments, identifying existing gaps and bottlenecks. GWEC worked to design and enact a wind energy strategy together with governmental bodies and in collaboration with the Mexican Wind Energy Association (AMDEE), with the support of the Spanish Wind Energy Association (AEE).

With these partner organisations, GWEC organised its first capacity-building workshops in Mexico in 2011 in collaboration with the Secretary of Energy and the state-owned power utility CFE to raise awareness of the variable renewable energy and the need for large scale grid integration. Later that same year, GWEC and AMDEE together launched the first edition of Mexico WindPower Conference & Exhibition, which has gone on to be held annually every year since.

GWEC and its partner national associations worked to build political and social support for wind power development in Oaxaca, at a time of rising concern over a perceived lack of community engagement for local project developments and increasing social conflict.

GWEC's Latin America team has advocated for a regulatory framework that normalises private investments in the renewable energy sector. Our collaboration with government authorities helped to reform the electricity sector, through the Estrategia Nacional de Energía Energy Reform to the Constitution, and the Aprovechamiento de Energías Renovables y El Financiamiento de la Transición Energética Bill.

Under former President López Obrador, state-owned entities were given a stronger role in the electricity sector, significantly reducing the role of private sector investment in clean energy development.

GWEC is now engaging with the new Mexican government led by President Claudia Sheinbaum to support a recovery of the Mexican wind market and to attract new investment into the sector, leading to a reopening of quotas for private sector investments in Mexico's energy sector.

"The alliance between AMDEE and GWEC has allowed us to strengthen ties with the global community, share experiences and build capabilities to accelerate the energy transition in Mexico. GWEC has been a key player in promoting dialogue at different levels, technical cooperation and visibility of advances and goals in terms of clean energy. Together we will continue working to build a more solid, innovative industry committed to a sustainable future."

- Gerardo Perez Guerra,
President, Mexican Wind Energy Association (AMDEE)

06 GWEC IN AFRICA

GWEC in Africa

Regional Context

Wind energy deployment across Africa is steadily gaining momentum in a region where around 600 million people still lack reliable access to electricity[26]. Africa recorded one of its strongest years in 2024 for wind deployment, according to GWEC's 2025 Global Wind Report, with new installations nearly doubling compared to the previous year.

While Africa's total installed capacity is still modest compared to other regions, the pipeline of projects and increasing government support signal rising interest and potential for accelerated growth. The continent today has about 83 operational wind farms delivering a combined capacity of roughly 9 GW.

The wind sector's growth has been shaped by supportive policies, competitive procurement programmes, increased private sector investment, and the need to diversify energy sources. Falling technology costs and stronger corporate demand for clean energy have further encouraged uptake.

Deployment is highly concentrated in a few countries, with South Africa and Kenya leading in terms of installed capacity. Other countries, including Senegal, Ethiopia, Djibouti and Tunisia, are emerging with smaller but still significant projects and growing pipelines.

GWEC AFRICA
GLOBAL WIND ENERGY COUNCIL

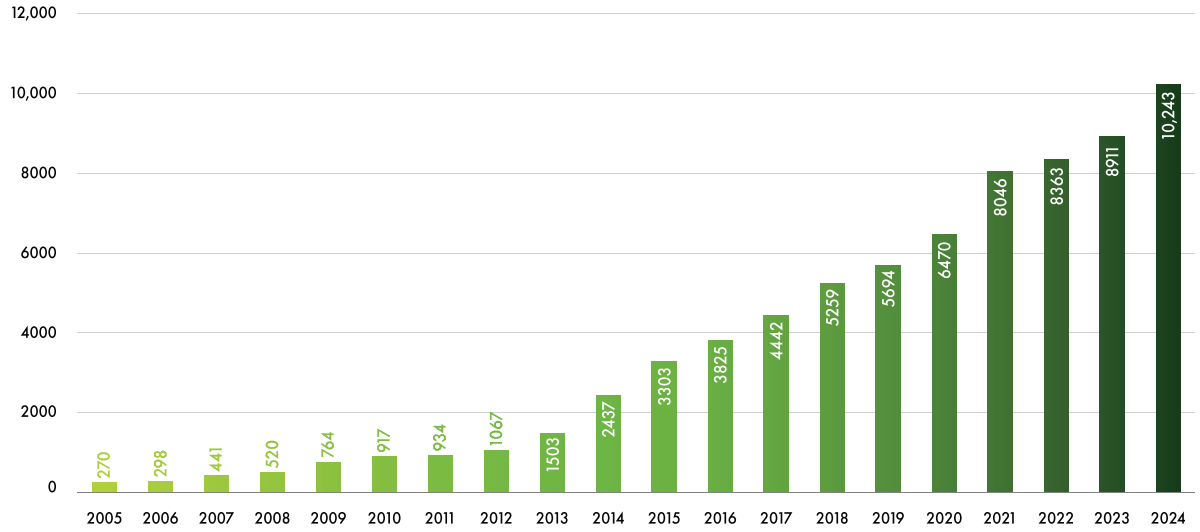
[26] United Nations 2025 Sustainable Development Goals Briefing Note

Workers at Lake Turkana Wind Farm
Marsabit County, Kenya

AFRICA 2005-2024

Cumulative Wind Installed Capacity (MW)

Source: GWEC Market Intelligence



Despite the strong growth momentum, Africa's wind sector still faces region-specific challenges that limit wider deployment. Many countries lack robust transmission infrastructure, making it difficult to connect new projects in high-resource areas to demand centres. Financing hurdles remain significant, with high capital costs, limited access to concessional finance, and perceptions of elevated investment risk often slowing project development.

Policy and regulatory barriers also constrain progress. In several countries, uncertain or inconsistent energy policies, delays in procurement rounds, and limited institutional capacity reduce investor confidence. Currency risks and underdeveloped local capital markets add further complexity for international investors.

At the local level, developers often face challenges with land acquisition, permitting, and community engagement, particularly where awareness of wind energy remains low. Supply chain skills gaps also create bottlenecks, while slow progress on cross-border regional grid integration also prevents Africa from fully harnessing its diverse wind resources to serve wider markets. Together, these challenges explain why Africa's vast wind potential is still only partly realised.

Our Approach

With its vast untapped potential for developing its wind resources, clean electricity access requirements and need for stronger industry-government collaboration, GWEC has identified Africa as a priority focus region. GWEC's work in Africa is headquartered in Nairobi, Kenya.

After more than a decade of engagement with national and regional organisations such as the South African Wind Energy Association (SAWEA), GWEC expanded its presence within Africa in 2019 when it launched the GWEC Africa Task Force to accelerate wind development on the continent.

GWEC's Africa Task Force, which brings together leading representatives of associations and companies active in Africa, plays an important role as a dedicated regional platform for industry and government engagement. Through the task force, GWEC organises workshops and knowledge-sharing roundtables to strengthen local technical and institutional capacity.

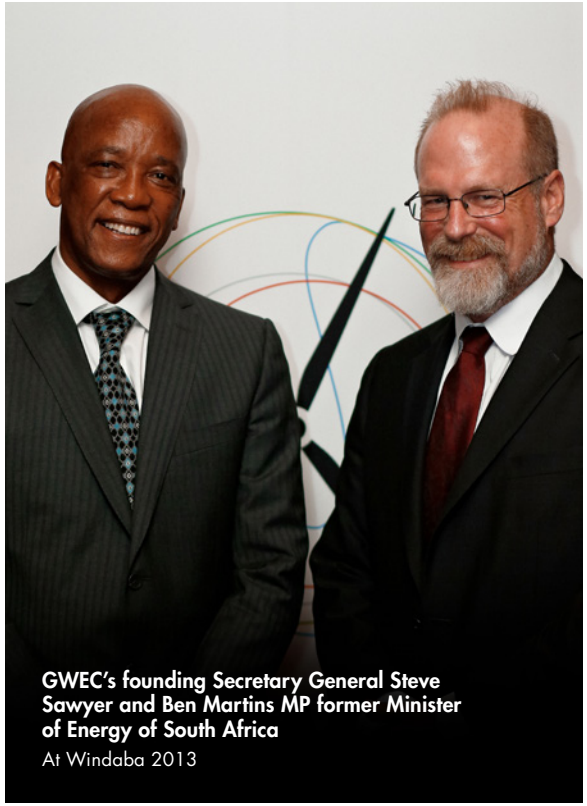
GWEC works closely with a network of national and regional industry associations, development partners, and policy platforms to accelerate wind deployment across the continent. Key partners include SAWEA, the Electricity Sector Association of Kenya (ESAK) and the Nigeria Wind Energy Council (NWEC).

GWEC's activities focus heavily on policy advocacy, knowledge-sharing and capacity-building, providing strategic and technical guidance and engaging with government stakeholders on the integration of wind in national energy strategies, competitive procurement processes and auction

Wangari Muchiri, Africa WindPower Director
At Windaba 2024


CEO, Electricity Sector Association of Kenya
At the GAP Summit, Lisbon, Portugal, 2025


Niveshen Govender, CEO, South African Wind Energy Association
At the GAP Summit, Lisbon, Portugal, 2025


GWEC's founding Secretary General Steve Sawyer and Ben Martins MP former Minister of Energy of South Africa
At Windaba 2013

design, power purchase agreement structures, and supply chain localisation. GWEC is pushing for enabling frameworks and more effective wind power procurement mechanisms across the continent.

In order to incentivise and accelerate private and public sector investment, GWEC has also been working with partners like the African Development Bank to unlock concessional finance, de-risk investments and crowd-in private capital.

Over the past five years, GWEC has launched and grown Africa Wind Power, focusing on the promotion of zero-carbon, cost-competitive, wind energy across the African continent, with the ability to draw upon the expertise and knowledge of the global wind energy industry.

GWEC continues to produce data-driven analysis on African wind markets through its Global Wind Report and a dedicated Status of Wind in Africa report. These publications provide visibility on market trends and opportunities, enabling governments, developers, and investors to make informed decisions.

GWEC's Africa Task Force seeks to build regional cooperation with special focus on the Sub-Saharan African markets.

gwec.net/policy/taskforces/africa

GWEC
AFRICA TASK FORCE

Wangari Muchiri, Africa WindPower Director
Speaking at the high-level breakfast on unlocking investments for the continent's renewable transition on sidelines of the Africa Climate Summit 2025.

EVENT

CATALYSING INVESTMENT INTO AFRICA'S WIND SECTOR

At the Second Africa Climate Summit in September 2025, hosted by Ethiopia in Addis Ababa, governments from across the region reaffirmed their ambition to grow the continent's renewable energy capacity from 56 GW to 300 GW by 2030[23]. This will require Africa's share of global renewable energy investments to rise from just 2% today to at least 20% by 2030.

At the Summit, GWEC together with Enzi Ijayo Africa Initiative and Africa Climate Insights, hosted a high-level panel event on unlocking investments for the continent's renewable transition. Wangari Muchiri, GWEC's Director of Africa, said: "For far too long, Africa, home to more than a billion people with diverse economic structures and resources, has been portrayed as lagging behind in the global energy transition. This narrative is misleading. The fact is our continent is not energy poor, but investment poor."

[23] Africa Climate Summit 2025

Our Impact

GWEC's regional and national-level policy engagement and advocacy is helping to accelerate the deployment of wind energy across the African continent. At a time when African governments across the region are seeking to mobilise investment and increase access to clean, affordable and reliable new sources of energy, GWEC has been able to make a powerful case for wind power's unique role and capabilities in the continent's energy mix.

Our team has pursued a market-enabling strategy across Africa involving policy and regulatory engagement, financing and investment mobilisation, and capacity-building. This has supported wind power reforms across fast growing wind markets such as South Africa, Kenya, and Senegal, while engaging with new entrants like Namibia and Nigeria to create pathways for utility-scale wind.

Africa's wind sector is now moving from isolated flagship projects toward more consistent growth, supported by auctions, international investment, and regional energy diversification strategies. GWEC's policy engagement has helped to catalyse discussion on auctions and regulatory reforms, particularly in South Africa, Kenya, and other emerging markets.

"Our partnership with GWEC has been pivotal in advancing Nigeria's wind energy agenda. Through their technical guidance, visibility, and support, we've strengthened national dialogue, built local capacity, and showcased wind as a key pillar of Nigeria's clean energy future. GWEC's collaborative spirit inspires confidence in what's possible for Africa's renewable transition."

- Emeka Okpupkara,
Chairman, Nigeria Wind Energy Council

Wangari Muchiri, Africa WindPower Director
At the Africa Energy Indaba, 2025

Major Africa Policy Outcomes (2020-2025)

GWEC's team has also expanded data visibility for Africa, with our annual reporting now consistently highlighting developments and pipelines across key markets. By documenting the achievement of regional milestones, GWEC has helped to validate the industry's progress, showing steady growth in wind deployment across Africa in successive annual reports.

Our team is supporting the continent's climate leadership by supporting governments to strengthen their ambition in national climate commitments (NDCs) under the Paris Agreement. These commitments made at the UN now explicitly reference a scaling up of renewable energy, helping to create stronger political momentum for wind deployment.

GWEC believes that with stronger policy commitments and investment in transmission infrastructure, wind energy could play a much greater role in Africa's clean energy future. We are seeking to work with governments, regional institutions, civil society as well as industry and philanthropic partners to achieve this vision.

Action in 2025

Africa

South Africa's New Electricity Market

In January 2025, GWEC welcomed South Africa's Electricity Regulation Amendment Act coming into effect. The legislation, passed in August 2024, establishes an independent Transmission System Operator and a competitive wholesale electricity market. These reforms are critical for unlocking private sector participation in wind energy and enhancing market transparency.

Kenya's Green Industrialisation

In February 2025, GWEC hosted a Green Industrialisation Roundtable in Nairobi. The workshop focused on the perspectives of offtakers, aiming to strengthen demand aggregation and contractual frameworks that accelerate investment in wind and renewables.

South Africa Workshop with SAWEA

In March 2025, GWEC in collaboration with South African Wind Energy Industry Association (SAWEA) held a CEO Breakfast event under the theme, Transforming the Renewable Energy Market through Policy-driven Sector Reforms. This event brought together public and private stakeholders, particularly policy and industry leaders, to look at how the Electricity Regulation Amendment Act will shape the country's renewable energy market going forward.

Exploring Opportunities for Independent Power Producers

In March 2025, GWEC held a two-day Renewables and IPP & PPA workshop at Africa Energy Indaba Week, the industry conference and exhibition in Cape Town, South Africa. The workshop provided stakeholders including African SMEs and IPPs with practical insights and strategies to foster a vibrant and financially viable wind energy sector.

Climate Investment Mapping Mission

In April 2025, GWEC led a climate investment mapping mission to China with senior officials from both Kenya and South Africa. The mission focused on green industrialisation, policy frameworks and renewable energy deployment. The mission also advanced an Africa Climate Investments Tracker with Tencent for launching at COP30.

Youth Empowerment in Nigeria

In May 2025, in Abuja, Nigeria, GWEC launched the Youth for Wind, Climate and Innovation Initiative in partnership with the Ministry of Environment and NWEC. The initiative aims to empower Nigerian youth in wind and climate innovation through mentorship and practical tools. It builds on Wind Energy Clubs and highlights youth-led solutions for a just and inclusive energy transition.

African Union Wind Energy Webinar

In June 2025, GWEC and the African Union's AFREC (African Energy Commission) co-hosted a regional webinar with African policymakers, utilities, and developers. Discussions focused on using wind energy to bridge electricity access gaps, with Africa's wind potential estimated at 461 GW. Topics included policy reform, procurement mechanisms and institutional capacity building. Case studies were shared from Kenya, Morocco, and Denmark, alongside findings from GWEC's Status of Wind Report for Africa.

South Africa's Green Industrialisation

In June 2025, GWEC participated in a Green Industrial Clusters Roundtable with Green Cape, UNIDO and AIIM. The event highlighted the need for aligning energy, trade and industrial policy, and strengthening SEZ (Special Economic Zone) frameworks.

Africa Youth Engagement Summit

In June 2025, GWEC participated in the YES! 2025 Summit, joining a high-level panel on wind energy and youth engagement. The session tackled Africa's 9 GW wind footprint, policy gaps, and the need for skills development. Discussions centered on inclusive planning, youth entrepreneurship and benefit-sharing models like REIPPPP. The event affirmed the importance of youth in Africa's wind energy transition.

Investment call at Second Africa Climate Summit

In September 2025, GWEC participated in the Second Africa Climate Summit, hosted by Ethiopia in Addis Ababa. At the summit, GWEC together with Enzi Ijayo Africa Initiative and Africa Climate Insights hosted a high-level panel event on unlocking investments for the continent's renewable transition. The event brought together ministers, investors, energy experts and media to make the case for investing in Africa's clean energy transition.

Windaba 2025 Conference and Exhibition

In October 2025, GWEC served as a strategic partner at the Windaba 2025 Conference and Exhibition, hosted by the South African Wind Energy Association (SAWEA). GWEC's participation in the forum reaffirmed its commitment to advancing Africa's wind energy agenda and supporting local economic empowerment.

School Capacity-Building Workshops

As part of its continued collaboration with SAWEA and the National Transmission Company South Africa, GWEC supported the successful delivery of two industry capacity building workshops under the SAWEM School initiative. These workshops contributed to strengthening institutional capacity and sectoral alignment on transmission-related reforms and renewable integration.

AFRICA

FEATURED COUNTRIES

South Africa

GWEC, in partnership with the South African Wind Energy Association (SAWEA), has adopted a collaborative approach to strengthen the policy and regulatory framework for renewable energy in South Africa.

Through targeted strategic and technical assistance and by addressing barriers to investment and market growth, GWEC and SAWEA aim to accelerate the scale-up of wind power as a central pillar of South Africa's energy transition.

Our team has prioritised partnership-building and stakeholder engagement, ensuring alignment between government, industry and international partners. We have been engaged in knowledge-sharing activities, such as workshops and study tours, to transfer global best practices into the South African context.

In addition, we have advanced capacity-building by embedding technical and policy experts with SAWEA to support government policymaking. These experts boost institutional capacity to provide technical input on policy frameworks and highlight the socio-economic and climate benefits of wind energy.

GWEC, working with SAWEA, has supported reforms shaping South Africa's wind sector. Recent changes include the Electricity Regulation Amendment Act, which came into force in January 2025 which creates the framework for a new competitive electricity market.

"For more than a decade, GWEC has stood beside SAWEA, not only as a global ally, but as a true strategic enabler. Through its Africa Wind Power Programme, GWEC has amplified South Africa's voice on the global stage, positioning our industry among the world's leaders in technical excellence and collaboration. Its commitment to capacity-building and knowledge exchange continues to strengthen our sector's expertise and unlock new opportunities for growth."

- Niveshen Govender,
CEO, South African Wind Energy Association

AWARD

GWEC RECOGNISED AT SAWEA AWARDS

GWEC was awarded the Stakeholder Recognition Award at the 2025 South African Wind Energy Association (SAWEA) Industry Awards Ceremony.

"For more than a decade, GWEC has stood proudly alongside SAWEA and the broader South African wind industry – championing policy, driving collaboration, and amplifying Africa's voice on the global stage," commented Wangari Muchuri, GWEC's Director of Africa. "This recognition from SAWEA is a testament to the great partnership we have built over the years."

GWEC was a strategic partner for Windaba 2025, Africa's premier wind energy event, hosted by SAWEA. GWEC's participation in the forum reaffirmed its commitment to advancing Africa's wind energy agenda and supporting local economic empowerment. Over the past decade, GWEC has worked closely with SAWEA as both a global ally and a strategic enabler in the country's renewable energy transition.

GWEC Team receiving GWEC's Stakeholder Recognition Award
At the 2025 SAWEA Industry Awards Ceremony

AFRICA

FEATURED COUNTRIES

Kenya

GWEC's approach in Kenya is focused on practical policy-focused interventions designed to strengthen local capacity and ambition. GWEC places senior technical and policy experts into partner ministries, the climate envoy's office and key agencies in Kenya to strengthen capacity for systems-level energy transition planning.

Our team provides strategic and technical assistance: policy advice, regulatory guidance, training for policymakers, study tours, stakeholder convening and targeted advocacy to accelerate bankable renewable energy pipelines. This capacity-building model is designed to improve government decision-making so that large-scale private investment and installations of wind and other renewables can follow.

GWEC has observed growing recognition from government and project developers in Kenya of the value of a clustering approach to wind project development. This model aggregates wind projects into valleys or zones, enabling scale, reducing infrastructure duplication, and enhancing the investability of wind energy. Stakeholders are increasingly embracing this strategy as a pathway to cost-effective and bankable project delivery.

GWEC's first formal engagement in Kenya took place in June 2023 during the planning and execution of the inaugural Africa Climate Summit and Africa Climate Week in Nairobi. At this high-level event, GWEC convened a side event which brought together policymakers, investors, regulators, developers, financiers, and regional wind associations from across Africa. The event spotlighted wind power as a critical solution for Africa's climate and energy transition, fostering collaboration and showcasing success stories and case studies.

POLICY

GREEN ENERGY INDUSTRIALISATION IN EAST AFRICA

GWEC Africa Wind Power, in collaboration with the Office of Kenya's Special Envoy for Climate Change, Accelerated Partnership for Renewables in Africa (APRA), Africa Green Industrialisation Initiative (AGII) and Global Renewables Alliance (GRA), hosted the 4th Early Movers Roundtable at the Capital Club of East Africa, Nairobi.

Under the theme, Driving Africa's Green Industrial Growth through Fast & Fair Permitting, the roundtable brought together senior government officials, regulators, developers, investors, DFIs, and technical partners to tackle slow and fragmented permitting systems. With Africa targeting 300 GW of RE capacity by 2030, and Kenya aiming for 100GW by 2040, there is an urgent need to streamline permitting processes to unlock investment at scale.

At the event, John Mwendwa CEO of the Kenya Investment Authority (KenInvest) highlighted the significant "opportunity costs" associated with current permitting timelines, urging a "one-stop shop" approach to streamline investments and connect green energy with manufacturing.

Attendees at the '4th Early Movers Roundtable' event in Nairobi, hosted by GWEC
Nairobi, Kenya, 2025

Attendees at the '4th Early Movers Roundtable' event in Nairobi, hosted by GWEC
Nairobi, Kenya, 2025

07 MEMBERSHIP

Membership

GWEC represents over 1,500 companies, organisations and institutions in more than 80 countries, including manufacturers, developers, component suppliers, research institutes, national wind and renewables associations, electricity providers, finance and insurance companies.

In addition, we represent national trade associations from both established and emerging wind markets, fostering collaboration across borders to accelerate the growth of the global wind industry.

Global Leaders

GE VERNOVA · Vestas · Iberdrola · SIEMENS energy · Ørsted · equinor · CIP Copenhagen Infrastructure Partners · sse Renewables · CORIO · SUZLON · Envision Net Zero Tech Partner · MASDAR · octopus energy generation · MINGYANG

Corporate Membership

There are four tiers of Corporate Members:

Tier 1: Global Leader

This category of membership is open for any corporation that wants to play a leading role in the global wind industry. As a leading member, a corporation will help set the agenda for the global wind industry. Corporations in this category have significant experience in wind energy and a track record for setting the global agenda. Alternatively, any corporations having a consolidated annual turnover exceeding Euro 100 million can apply for this category, providing they are prepared to play a significant role in participating in the Association's Executive Committee.

Tier 2: Global Influencer

This category of membership is open for corporations that are looking to have significant influence on the global wind industry. These corporations are active in task forces and help drive policy and advocacy for the wind industry globally. These corporations are also looking to position themselves as thought leaders of the industry. Alternatively, any corporations having a consolidated annual turnover exceeding Euro 100 million can apply for this category.

Tier 3: Global Player

This category of membership is open for corporations that are actively involved in the global wind industry, with dedicated operations in one or more regions of the globe or an intention to become a global player. Alternatively, corporations having a consolidated annual turnover ranging between Euro 10 million and Euro 100 million can apply for this category.

Tier 4: Global Supporter

This category of membership is open for small companies that are looking to become/or have already become a recognised part of the global wind supply chain. Alternatively, corporations having a consolidated annual turnover under Euro 10 million can apply for this category.

Association Membership

GWCE has four classes of Association Membership:

AC1

Continental associations representing at least 3/4 (75%) of the existing national wind energy associations on that continent, and where the continent has at least 20,000 MW of installed wind energy capacity. If a continental association exists, then a national association on that continent can become a working member of GWEC as long as it is already a member of the continental association.

AC2

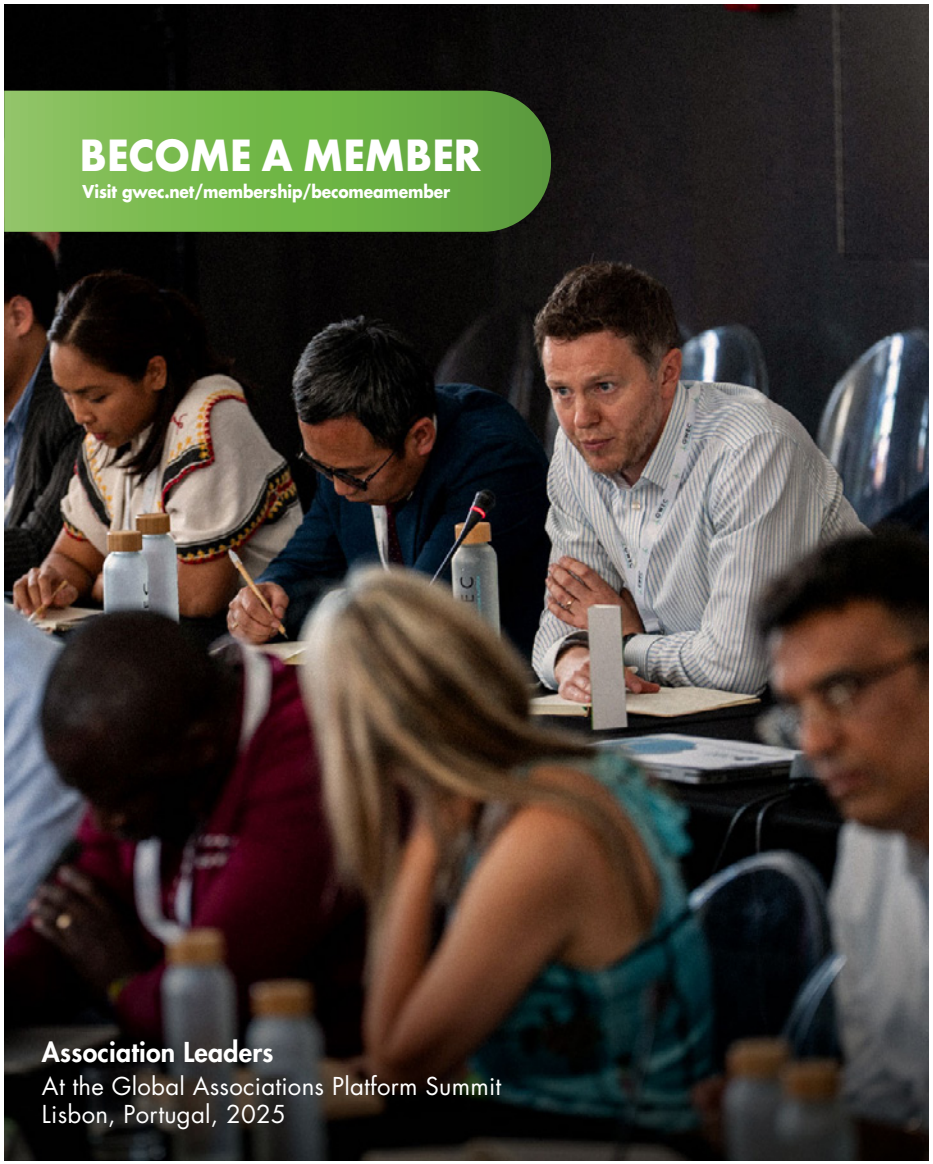
Continental associations representing at least 3/4 (75%) of the existing national wind energy associations on that continent, and where the continent has less than 20,000 MW of installed wind energy capacity. If a continental association exists, then a national association on that continent can become a working member of GWEC as long as it is already a member of the continental association.

A1

National associations active in the field of wind energy.

A2

Associations, academic institutions and non profit institutions or organisations active in the field of wind energy (in developing countries).



Association Leaders
At the Global Associations Platform Summit
Lisbon, Portugal, 2025

A full list of corporate members can be found at www.gwec.net.

08 GOVERNANCE

Governance

GWEC is governed by its Articles of Association that were signed by founding members on 28 November 2005 and modified by an Extraordinary General Assembly of all members on 24 November 2021.

Corporate Membership

GWEC's Board of Directors play a critical role in guiding the organisation's mission, strategy, and governance. Its primary duty is to ensure the association operates in alignment with its stated purpose and serves the interests of its members. The board sets long-term goals, approves policies, and oversees financial health, including budgeting and resource allocation. It also hires, evaluates and supports the Chief Executive Officer (CEO) or executive director, ensuring effective leadership and operational management.

Board members act as fiduciaries, safeguarding the association's assets and ensuring compliance with legal and ethical standards. They monitor performance through regular reports, audits, and strategic reviews, making informed decisions that balance short-term needs with long-term sustainability.

Advocacy is another key responsibility: board members represent the association publicly, promote its value, and help build partnerships that advance its objectives. Additionally, the board fosters member engagement by maintaining transparency, encouraging participation, and adapting to evolving industry trends. While the executive team manages day-to-day operations, the board provides oversight, guidance, and accountability.

The overall objective of the board is to ensure the association remains relevant, financially sound, and true to its mission.

GWEC's Board is composed of an Association group and a Corporate group.

The Association group is comprised of the following:

- Three representatives from the AC1 members; and
- One representative of the Association members from each geographical region (Latin America, Africa and Asia).

The Corporate group is comprised of the following:

- One representative from each Global Leader and Global Influencer; and
- One representative for every six Global Players.

The Chair and Vice Chairs of GWEC are appointed by the Board for a period of two years. Representatives from the Global Player membership category are also elected for a two-year term at the Annual General Meeting (AGM), held in conjunction with the year's first Board meetings.

Executive Committee

The Executive Committee serves as a key leadership body within GWEC, providing strategic oversight and guidance for operational agility. Comprised of directors from GWEC's Global Leader tier of membership, the Officers of the Association – including the Chair and Vice Chairs, and Officers of GWEC including GWEC's CEO, Deputy CEO, Chief Industry Officer and Finance Director.

Representing the highest level of governance and expertise within GWEC, the committee's primary role is to advise the CEO and the Officers on critical matters, ensuring that decisions align with the association's mission and objectives.

One of the committee's core responsibilities is enabling swift decision-making on important management issues. By acting as a smaller, empowered group within the broader board structure, it ensures emerging issues can be addressed and strategic direction maintained in between the cadence of full Board meetings and the AGM.

Additionally, the Executive Committee supervises the implementation of the business plan approved by the Board of Directors, monitoring progress and addressing challenges as they arise. This oversight helps maintain accountability and ensures that strategic goals are translated into effective operational outcomes.

The Executive Committee functions as a bridge between governance and execution, combining high-level guidance with practical responsiveness to keep the association agile, focused and aligned with its long-term vision.

Board Meetings

GWEC's Board of Directors meets twice annually to review progress, approve key decisions, and ensure alignment with strategic objectives. The mid-year meeting serves as a critical checkpoint where the board is presented with the final audited financial results of the previous year, along with performance updates and any significant developments. GWEC's AGM is held in conjunction with this meeting.

The end-of-year meeting focuses on planning and resource allocation for the upcoming year. During this session, the Board reviews and approves the working budget and signs off on the activity plan, ensuring that priorities and initiatives are clearly defined and adequately funded. These meetings provide an opportunity for directors to engage in strategic discussions, monitor progress against the business plan, and address emerging challenges.

By maintaining this structured schedule, the Board ensures transparency, accountability, and continuity in decision-making, supporting the association's long-term success.

Purpose of the AGM

The Annual General Meeting (AGM) is a cornerstone of the association's governance process. Held alongside the mid-year Board meeting, its primary purpose is to assess the merits of motions before the members and hold biennial elections for the position of Chair and Vice Chairs and Global Player representatives.

Members at this meeting will receive from the Board a report of the association's activities over the past financial year and will decide on any resolution which may be duly submitted to the meeting by the Board or by at least 1/20th of the members.

The AGM also serves as a forum to pass any amendments to the Articles of Association, and to address other critical governance matters. It provides all members with an opportunity to review the association's performance, affirm strategic direction, and participate in key decisions. This process reinforces transparency, accountability, and member engagement in shaping the association's future.

Voting at Board meetings

Each board member is entitled to a single vote and motions are passed by a simple majority.

AGM voting rights of members

Each member who is present or represented has the following voting rights according to the membership category to which they belong.

ASSOCIATION MEMBERSHIP		CORPORATE MEMBERSHIP	
AC1	180 votes	Global Leader	60 votes
AC2	60 votes	Global Influencer	20 votes
A1	36 votes	Global Player	10 votes
A2	1 vote	Global Supporter	1 vote

After the votes are tallied, motions are passed by a weighted majority.

Current Board Members

As of June 2025, the date of the last AGM prior to the publication of this Impact Report, GWEC's Board members comprised:

Executive Committee:

Michael Hannibal, Partner at Copenhagen Infrastructure Partners (GWEC Chair)
Girish Tanti, Vice Chairman and founding member at Suzlon (GWEC Vice Chair – Corporate
Elbia Gannoum, CEO at ABEEolica (GWEC Vice Chair – Associations)
Malgosia Bartosik, Deputy CEO at WindEurope (representing three AC1 mandates)
Zoisa North-Bond, CEO at Octopus Energy
Anders Ystad, Head of Regulatory Affairs, at Equinor
Gilan Sabatier, CCO for Onshore Wind at GE Vernova
Juan Carlos Rucian Castellanos, Lead of Renewable European Affairs at Iberdrola
Ye Fan, President of International Business at Mingyang
Lauren Kim Uppink Calderwood, Head of Global Engagement & Thought Leadership Global External Affairs & Positioning at Ørsted
Jon Lezamiz, Head of Advocacy Government and Executive Affairs at Siemens Energy
Guillermo Martinez-Navas, Chief Development Officer at Corio Generation
Morten Dyrholm, Group Senior Vice President, Marketing, Communications, Sustainability and Public Affairs at Vestas
Kane Xu, Senior Vice President President of International Business Product Line & President of Asia-Africa, India-Australia and North America Region at Envision Energy
Daniel Pearson, Director of Business Development, International at SSE Renewables

Board of Directors:

Niveshen Govender, CEO at SAWEA (South African Wind Energy Association)
Kai Wu, Vice President at Goldwind
Luis Martí Álvarez, Director of the Digital Development at Acciona
Andreas Becker, Head of Regulatory Affairs at Enercon
Marty Sinthavanarong, Vice President at Gulf Energy Development
Tony Adams, Global Public Affairs at Nordex Group
Bryan O'Neil, Director, Global Offshore & Power Generation Segments at The Lincoln Electric Company
Josh Willison, Head of Regulatory Affairs, Global Offshore Wind at BP
Dan Finch, Strategic Oversight Director at Ocean Winds
Barry Lynch, Partner - Head of Operations, Energy Infrastructure at Actis
Yu Guiyong, Director of Industry Research Department and General Manager at CWEA
Paulo Fernando Soares, Research Manager at SANY Renewable Energy
Brian Bell, Global Director Offshore Wind at Fugro
Ben Hunt, Head of Communications at JERA Nex
Jessica Finch, Global Division, Operations Director, Asia Pacific at RSK Group
Charles Ogilvie, Executive Director and a Co-Founder at Ocean Energy Pathway (OEP)
Leon Hailstones, Vice President, Global Sales at NRG Systems
Joerg Gmeinbauer, Global VP, Power & Renewables at Bureau Veritas
Aaron Smith, CCO at Principle Power
Rafael Solis, Director of Public Affairs & Community Relations at EDP Renewables
Alexander Sarnes Negrão, CEO at AERIS ENEGY
Yong Yu, CEO at Windey Energy
Husain Al Meer, Director, Global Offshore Wind at MASDAR
Matthew Dickie, APAC Head of Regulatory Affairs at RWE Renewables
Graeme McCann, Technical Director – Renewables at Arup
Pavel Miller, Head of Corporate Affairs, International at SSE Renewables

Policy and Procedures:

The GWEC Secretariat has defined policy and procedures relating to the following areas:

- Acceptance and Refusal of Donations
- Annual Leave
- Anti-Bullying & Harassment
- Anti-Fraud Bribery and Corruption
- Anti-Money Laundering
- Anti-Slavery
- Child Protection
- Conflicts of Interest
- Crisis Communications and Media Engagement Protocols
- Data Protection (GDPR)
- Disciplinary
- Diversity, Inclusion and Equal Opportunities
- Foreign Currency Management
- Global Code of Conduct
- Grievance
- GWEC Scheme of Delegation
- Health & Safety
- Procurement
- Recruitment
- Risk Management
- Safeguarding Framework
- Social Media
- Travel and Expenses
- Whistleblowing

External governance:

GWEC works with professional advisors including external auditors and legal counsel.

Legal Counsel:

Will Van Tongelen, Advocaat – Attorney at law
wvt-LAW Advocatenkantoor
Andrélaan 13, 2960 Brecht

09 THE FUTURE

Powering the Future with Wind

Looking ahead to the next two decades

As we have seen over the last 20 years, wind energy has established itself as one of the world's most vital energy and climate solutions and become a mature technology sector, with GWEC playing a key role in developing and globalising the industry.

We are, as the saying goes, at the end of the beginning, but the big exciting challenges still lie ahead. The establishment of the Net Zero goal and then the 3X Renewables target set a whole new benchmark and expectation for our industry because, to achieve these goals, and carry out the energy transition in a cost-efficient manner, we will need to radically scale up annual deployment of wind power.

Expected annual installations of 170 GW plus in 2026 need to quickly scale to 300 GW and beyond, with a corresponding increase in investment, jobs and supply chain capacity. To achieve this, the wind sector needs to get much better at explaining its business case, mobilising investments, working with policymakers and working with civil society to build support and social licence.

The industry needs to move beyond the mature markets of China, Europe, the US, India, Brazil and a few others to become truly global, working with partners to catalyse and scale up badly needed investments in Global South developing economies. Much of the work that governments, industry and stakeholders have carried out over the last decade will pay off in the coming years, in places like Vietnam, the Philippines, South Korea, Egypt, Colombia and other countries. But there is still much to do ensure that resource rich, infrastructure starved regions like Africa can fully benefit from the global renewables revolution.

Similarly, GWEC's work in setting up a global ecosystem of institutions around the world – from new national associations, to institutions and alliances such as the Global Offshore Wind Alliance (GOWA), Ocean Energy Pathway (OEP) and Global Renewables Alliance (GRA), to initiatives like the Wind Sustainability Initiative – set the basis for wind to increase its influence and deployment in the coming years. But there are many challenges – both existing and emerging ones – which will require GWEC to significantly scale up its operational capacity and capabilities around the world.

Whether it is mapping and combatting disinformation and the influence of incumbent fossil fuel interests, promoting the benefits of wind in new markets, helping governments with technical assistance, creating alliances and coalitions to scale investments, fighting for gender diversity and good labour practices, or ensuring sustainable global wind turbine manufacturing standards, GWEC will be there.

With the support of our companies, partners, and funders, we look forward to the next two decades of powering the future.

Ben Backwell, CEO, GWEC







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