EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION

A breath of fresh air

The European Wind Energy Association

Annual Report 2009

EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION

Give Europe a breath of fresh air

Europe possesses an energy source which could power it seven times over: the wind. European companies are world leaders in wind power, generating thousands of jobs. Wind energy reduces Europe's dependence, and spending, on imported fossil fuels. It lowers electricity prices and emits no CO_2.

Over the next 12 years, Europe must build new power capacity equal to half the current total. We must use this opportunity to construct a modern power system that meets the challenges of the 21st century.

Give Europe a breath of fresh air by adopting a wind turbine at www.ewea.org/freshair

Breath of FRESH AIR
www.ewea.org/freshair

A breath of fresh air
The European Wind Energy Association
Annual Report 2009

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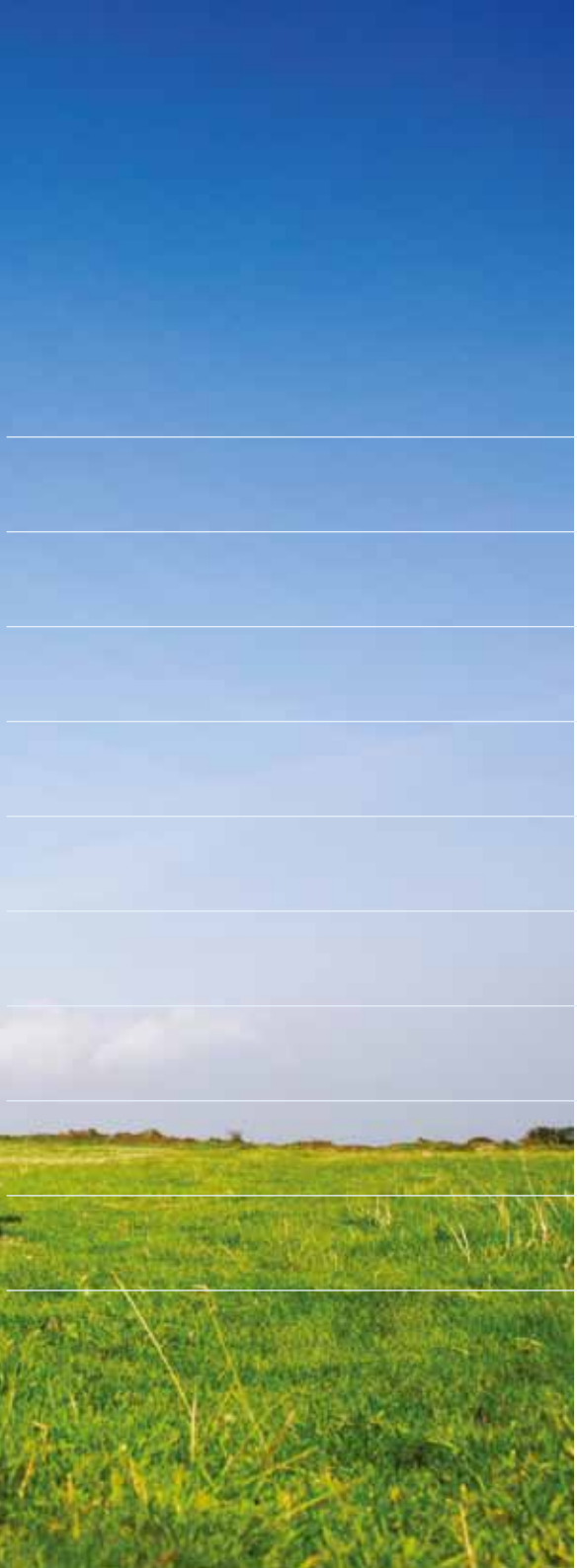


Photo: Alexis Haulot

Foreword:
the age of wind has begun

For the wind energy sector, 2009 is above all the year in which the EU's Renewable Energy Directive became law. The Directive gives all EU countries binding renewables targets for the first time ever, and an overall EU goal of 20% renewable energy by 2020.

But even before the Directive was passed, wind had overtaken all other sources of power – such as nuclear, coal and gas – to become Europe's number one in terms of new installed capacity. In 2008, 36% of all new power capacity wind and in 2009, this went up to 39%.

Wind offers a multitude of benefits. It is indigenous to Europe, so we no longer have to rely on third countries' good humour for our energy.

Wind is economically sound – there are no changeable fuel costs to pay, and the European wind industry is a world leader.

Wind is clean – it produces no harmful gases, and producers do not need to buy carbon permits.

In 2009, the European Wind Energy Association (EWEA) continued promoting the benefits of wind. We were present in all the key energy and climate debates, meeting with decision makers and influencing European policy. We held our biggest annual European Wind Energy Conference ever. We were regularly quoted in the media.

We also increased our wind energy targets. By 2020, we believe there will be 230 GW of installed capacity in Europe, including 40 GW offshore. By 2030, there will be 400 GW, including 250 GW offshore.

Europe's current electricity supply structure still bears the characteristics of the time in which it was developed. It is national in nature, the technologies applied are ageing and the markets supporting it are underdeveloped.

The power system must be supported by modern infrastructure technology, research and development and a well functioning internal market in electricity in which investors, rather than European consumers, are exposed to carbon and fuel price risk.

By 2020, we must ensure that the infrastructure, markets and technologies are available for the build-up of a modern renewable energy power system which, by 2050, will also provide a large share of Europe's transport needs through electric vehicles.

2009 will go down in history for many reasons and wind energy is at the forefront of an historic change in the way electricity is generated, supplied and consumed. We are entering the age of wind.

Christian Kjaer
EWEA Chief Executive

Arthouros Zervos
EWEA President

Key facts:
wind power installed in Europe by end of 2009

	Installed 2008	End 2008	Installed 2009	End 2009
EU capacity (MW)				
Austria	14	995	0	995
Belgium	135	415	149	563
Bulgaria	63	120	57	177
Cyprus	0	0	0	0
Czech Republic	34	150	44	192
Denmark	60	3,163	334	3,465
Estonia	19	78	64	142
Finland	33	143	4	146
France	950	3,404	1,088	4,492
Germany	1665	23,903	1,917	25,777
Greece	114	985	102	1,087
Hungary	62	127	74	201
Ireland	232	1,027	233	1,260
Italy	1010	3,736	1,114	4,850
Latvia	0	27	2	28
Lithuania	3	54	37	91
Luxembourg	0	35	0	35
Malta	0	0	0	0
Netherlands	500	2,225	39	2,229
Poland	268	544	181	725
Portugal	712	2,862	673	3,535
Romania	3	11	3	14
Slovakia	0	3	0	3
Slovenia	0	0	0	0
Spain	1558	16,689	2,459	19,149
Sweden	262	1,048	512	1,560
United Kingdom	569	2,974	1,077	4,051
Total EU-27	**8,268**	**64,719**	**10,163**	**74,767**
Total EU-15	**7,815**	**63,604**	**9,702**	**73,194**
Total EU-12	**453**	**1,115**	**461**	**1,574**
Of which offshore and near shore	374	1,479	582	2,061

European Union: 74,767 MW
Candidate Countries: 829 MW
EFTA: 449 MW
Total Europe: 76,152 MW

	Installed 2008	End 2008	Installed 2009	End 2009
Candidate Countries (MW)				
Croatia	1	18	10	28
FYROM*	0	0	0	0
Turkey	311	458	343	801
Total	**312**	**476**	**353**	**829**
EFTA (MW)				
Iceland	0	0	0	0
Liechtenstein	0	0	0	0
Norway	103	429	2	431
Switzerland	2	14	4	18
Total	**105**	**443**	**6**	**449**
Other (MW)				
Faroe Islands	0	4	0	4
Ukraine	1	90	4	94
Russia	0	9	0	9
Total	**1**	**103**	**4**	**107**
Total Europe	**8,686**	**65,741**	**10,526**	**76,152**

*FYROM = Former Yugoslav Republic of Macedonia
Note: Due to previous-year adjustments, 114.77 MW of project de-commissioning, re-powering and rounding of figures, the total 2009 end-of-year cumulative capacity is not exactly equivalent to the sum of the 2008 end-of-year total plus the 2009 additions.


4
FO
431
NO
1,560
SE
146
FI
142
EE
9
RU
28
LV
91
LT
3,465
DK
1,260
IE
4,051
UK
2,229
NL
563
BE
35
LU
25,777
DE
192
CZ
725
PO
94
UA
3
SK
995
AT
201
HU
18
CH
4,492
FR
28
HR
4,850
IT
14
RO
177
BG
3,535
PT
19,149
ES
1,087
GR
801
TR
>15,000 MW
1,000 - 15,000 MW
100 - 1,000 MW
0 - 100 MW

What we want:
EWEA's goals

In February 2009, EWEA updated its strategy because of the new Renewable Energy Directive, which means wind has legislative support up to 2020 and sets binding renewables targets for EU countries.

EWEA's work centres on six strategic and political areas.

1. The Renewable Energy Directive and post-2020 legislation

- Ensure the Renewable Energy Directive is properly implemented in the Member States and that the National Renewable Energy Action Plans clearly communicate the steps countries will take.
- Analyse the wind industry's needs post-2020 and prepare for a post-2020 regulatory framework for wind, based on 100% renewables.

2. Electricity infrastructure and power markets

- Ensure the 2009 Internal Electricity Market Directive is properly implemented in Member States. Push to split responsibility for power production and transmission so third parties have fairer grid access.
- Ensure EU legislation is adopted ensuring that power infrastructure is planned, and developed with large-scale wind energy in mind.
- Fight for power capacity investors to be exposed to carbon and fuel price risk, through improved market power competition. Push for a Europe-wide power grid to improve electricity market competition. Help optimise grid codes for wind energy.

3. Offshore wind

- Push for EU legislation on building more grid infrastructure.
- Ensure the European Commission, and national governments from across Europe agree a strategic offshore grid plan and prepare legislation that will allow at least 40 GW of offshore wind power by 2020.

4. Research

- Lobby for increased EU research funding and promote dedicated R&D financing instruments for the wind industry. Press for endorsement and implementation of the European Wind Initiative.
- Ensure that Europe maintains its leadership in wind energy technology.

• 5. Climate change

- Push for a real price on carbon worldwide. Fight for 100% auctioning of CO_2 emission allowances.
- Work with the Global Wind Energy Council (GWEC) on international climate negotiations, promoting wind as a key climate change solution.

6. Communicating wind

- Communicate that with wind energy, Europe can turn the energy and climate crisis, and the upcoming turnover in power capacity, into an opportunity for our companies, a benefit to the environment and increased welfare for our citizens.

Photo: Vestas

What we do:
acting on policy

Promoting a stable EU political framework

The Renewable Energy Directive

On 6 April 2009, the European Council unanimously adopted the Renewable Energy Directive, which was published in the Official Journal in June (2009/28/EC). The 2009 Renewable Energy Directive sets in place a target of 20% renewable energy in the EU by 2020, with binding targets at national level. For electricity, the binding targets mean that the share of renewable energy in the EU's power mix must increase from 15% to 34% by 2020. The adoption of the Directive was warmly welcomed by EWEA, which had spent several years working to promote far-reaching, ambitious EU legislation for renewables. On 30 June, the Commission published a 40-page National Renewable Energy Action Plan (NREAP) template, giving governments a binding framework for drawing up the steps they will take to meet those national targets.

The template also requires national governments to explain the actions they will take to develop the power grid and how they intend to streamline administrative procedures. The NREAPs will be extremely useful for the renewables industry as they will give an overview of probable market development up to 2020.

Member States must complete and submit their NREAPs to the European Commission by 30 June 2010. During 2009, EWEA met with the European Commission to discuss enforcement and implementation issues regarding the NREAPs.

EWEA was pleased to note that the European Commission will publish, by 2018, a Renewable Energy Roadmap for the post-2020 period. This will allow the wind power sector to ensure that a stable regulatory framework replaces the Renewable Energy Directive of 2009.

Strategic Energy Review

The second Strategic Energy Review was endorsed by the European Parliament on 3 February 2009, along with its six priority infrastructure actions, including the interconnection of the Baltic region, the Mediterranean Energy Ring and the North Sea Offshore Grid. EWEA stated that these are essential steps towards a properly functioning internal energy market in Europe.

New Energy Policy

Ongoing discussions focus on the European Commission's New Energy Policy, which it is expected to publish in 2010.

Electricity infrastructure, system operation and markets

European power market

On 25 June the third Energy Market Liberalisation Package was adopted by the EU Council.

National Regulatory Authorities will have to facilitate the integration of renewables into the power grid, and transmission system operators (TSOs) will have to grant electricity from renewable sources priority dispatch, as per the 2009 Renewable Energy Directive. EWEA's preferred approach of 'full unbundling', proposed by the European Commission, was retained. However, two 'opt-out' clauses remain, allowing European energy companies to retain their network assets, with network activities or day-to-day grid operation managed independently.

EWEA worked with the European Commission, National Regulatory Authorities and the TSOs to prepared the ground for the creation of a single European electricity market.

Wind in 2020 and 2030 - EWEA's targets

In 2009, EWEA increased its targets for wind energy in 2020 and 2030. For more, see the updated 'Pure Power' report on **www.ewea.org**.

WIND ENERGY IN 2020

- 230 GW installed capacity: 190 GW onshore and 40 GW offshore
- Meeting 14-17% of EU electricity demand depending on total demand
- Annual installations of 24.8 GW: annual investments of €23.5 billion
- 24% of total electricity generating capacity in the EU
- Producing 582 TWh of electricity, equivalent to the consumption of 131 million average EU households
- Avoiding 333 Mt CO_2 annually
- Avoided fuel cost of €28 billion (assuming IEA forecast18: fuel cost equivalent to $110/bbl of oil)
- Avoiding €8.3 billion of CO_2 cost annually (assuming €25/t CO_2).

WIND ENERGY IN 2030

- 400 GW installed capacity: 250 GW onshore and 150 GW offshore
- Meeting 26-34.7% of EU electricity demand depending on total demand
- Annual installations of 24.2 GW; annual investments of €24.8 billion
- 38% of total electricity generating capacity in the EU
- Producing 1,155 TWh of electricity, equivalent to the consumption of 241 million average EU households
- Avoiding 600 Mt CO_2 annually
- Avoided fuel cost of €56 billion (assuming IEA forecast: fuel cost equivalent to $122/bbl of oil)
- Avoiding €15 billion of CO_2 cost annually (assuming €25/t CO_2)

Infrastructure proposals

In February 2009, the European Council endorsed the Commission's Strategic Energy Review, which contains a commitment to develop a blueprint for a North Sea grid. This is an essential step towards a European supergrid and a fair power market, large amounts of renewables and affordable power.

In June, EWEA welcomed the publication of the Baltic Energy Market Interconnection Plan (BEMIP) to join the Baltic states up to the Nordel countries' grid, thus enlarging the market.
In December, EWEA organised a working breakfast on the BEMIP in the European Parliament, with Commissioner Piebalgs and MEPs.

The Commission published its proposal for an instrument on energy infrastructure monitoring in July. Following work by EWEA, the proposal included wind farm thresholds of 10 MW onshore and 20 MW offshore that were significantly lower than in its original proposal. EWEA will continue to push for a lower threshold of 5 MW onshore, and to retain the 20 MW offshore limit.

ENTSO-E

The new European body of Transmission System Operators (ENTSO-E) became fully operational in July. One of its key deliverables will be a 10-year network development plan, to be published every two years and include the modelling of the integrated network.

In addition, EWEA is providing data to the *OffshoreGrid* EU-funded project, which will develop scenarios for a North Sea grid in 2020.

ERGEG

EWEA is one of the stakeholders in a newly established ERGEG (European Regulators Group for Electricity and Gas) expert group on grid connection, and is involved in the TWENTIES project, which will investigate systems with high amounts of wind power.

EWEA has taken part in all ERGEG consultations relevant to the European wind industry - see 'What we do: producing new research' on p. 28.

Grid codes

In December, the EWEA Grid Code Working Group finalised the first ever grid code format for wind farms and launched it on **www.ewea.org**. EWEA proposed to establish firstly a template for the code, then to adapt the existing parameters to the template.

The new grid code format will help harmonise grid codes for wind farms, which will lower wind energy production costs, help system management, and lower the cost of electricity for consumers.

Offshore wind

In 2009, offshore wind went from strength to strength. Eight new wind farms with a combined power generating capacity of 577 MW were connected to Europe's grids. This represents a growth rate of 54% compared to the 373 MW installed during 2008.

EU Recovery Plan

The European Commission's Economic Recovery Plan was agreed in December. €3.5 billion will go to the energy sector for 2009 and 2010, including €2,365 million for gas and electricity interconnections, and €565 million for offshore wind energy projects. Over half the offshore money will be spent on offshore electricity interconnections, and EWEA commented that this will enable a greater cross-border flow of electricity, furthering the integration of Europe's power markets, improving competition and lowering power prices.

EWEA's 'Oceans of Opportunity' report

In 2009, the EWEA Offshore Working Group focused on preparations for the EWEA Offshore Wind Conference in Stockholm in September (see p. 24 'What we do: uniting the wind industry'), coordinated industry input into the Adamowitsch Working Group and advised on EWEA's offshore report: 'Oceans of Opportunity'.

EWEA launched the report at the Offshore Conference. It showed that existing and planned European offshore wind projects, if built, would supply 10% of Europe's electricity whilst avoiding over 200 million tonnes of CO_2 emissions every year.

The report also contained EWEA's '20 Year Network Development Plan' on grid development, and a pledge for businesses to help offshore development, calling on EU and Member States to do the same.

Photo: de Beer

Offshore Wind Coordinator Working Group
EWEA continues to work with the offshore wind coordinator, Georg Adamowitsch's working group. EWEA submitted a briefing in response to the coordinator's first annual report, and he organised a working group workshop at EWEC 2009 to liaise with the industry.

Maritime Spatial Planning
EWEA is working with DG MARE on Maritime Spatial Planning (MSP). EWEA has stressed the need for a clear regulatory framework and prioritisation of offshore wind development. EWEA is also to coordinate the SEANERGY project (see 'Projects' box on next page).

Wind energy research

In 2009, in the framework of the EU's Strategic Energy Technology Plan – which aims to help develop low-carbon technologies – the European Wind Energy Technology Platform (TPWind), run by EWEA, proposed a long-term research, development and demonstration programme for wind energy: the European Wind Initiative (EWI).

TPWind

In 2009, the European Wind Energy Technology Platform (TPWind), a network and R&D forum for researchers and wind stakeholders, continued its work. EWEA runs the secretariat of TPWind under the leadership of TPWind's chairman, Mr. Henning Kruse.

In its 2008 Strategic Research Agenda/ Market Deployment Strategy, TPWind had proposed reaching 350 GW of wind energy capacity by 2030. In April 2009, TPWind finalised an implementation plan proposing 15 projects to reach this target.

The EU Institutions have reacted positively to the Plan, and EWEA will keep working in order to make sure that it is taken into consideration in the funding of future European projects.

www.windplatform.eu

EWEA and EU projects

EWEA is coordinating several EU-funded projects.

SEANERGY will recommend how to remove Maritime Spatial Planning policy obstacles to offshore renewable power generation. The project will run for 24 months from its launch in late spring 2010.

OffshoreGrid aims to develop a regulatory framework for an offshore grid in northern Europe that takes the technical, economic, policy and regulatory aspects an into account. The project will run until October 2011.
www.offshoregrid.eu

WindSec provides funding to the European Wind Energy Technology Platform (TPWind), an EU network of approximately 150 wind energy experts advising the EU on supporting the development of wind power and improving the effectiveness of public funding. WINDSEC will run until March 2010.
www.windplatform.eu

WindBarriers is measuring the barriers to on- and offshore wind projects in Europe, looking at the costs and difficulty involved. WindBarriers will run until November 2010.
www.windbarriers.eu

UpWInd aims to develop and verify improved models of wind turbine components, which the industry needs for the design and manufacture of wind turbine for very large-scale future applications. UpWind will run until February 2011.
www.upwind.eu

Two EU projects were successfully completed in 2009.

Wind Energy – The Facts contains all relevant data on wind energy technology, grid integration, economics of wind, industry and markets, environmental impacts, and scenarios and targets for wind energy.
www.windfacts.eu

TradeWind formulated recommendations to help dismantle barriers to the large-scale integration of wind energy in European power systems.
www.trade-wind.eu

EWI sets out the research needed to achieve Europe's 2020 targets and beyond, and how to bring down the costs of onshore and offshore wind energy and integrate large amounts of wind energy into the electricity system, and supply sufficient human resources.

EWI produced the Wind Energy Technology Roadmap, included in the Commission's Communication on Financing Low Carbon Technologies of October 2009. The Communication proposes €6 billion of public and private funding for wind energy over the next ten years.

The final endorsement of the European Wind Energy Technology Roadmap should take place at the 2010 EU Spring Council.

EWEA is also working with the European Commission on one potential funding mechanism for the Roadmap – the 300 million ETS allowances available for "innovative renewable energy technologies".

Environment and climate change

2009 was punctuated by the preparatory meetings for COP15.

To coincide with the Environment Council in October and the COP15 preparations, EWEA launched its climate change brochure, 'Harness the wind to tackle climate change', pointing out wind's huge carbon emission reduction potential. Throughout the year, it urged leaders and negotiators to reach a legally-binding commitment with ambitious targets and support for developing countries.

EWEA staff members attended COP15. The wind industry had a strong presence with an operating 850 kW Vestas turbine at the VIP entrance, a 61.5 metre LM Glasfiber blade, boat trips to Middelgrunden offshore farm and a number of lobbying and media events, including a dinner for wind experts and negotiators and a joint press conference with UNEP.

Photo: GWEC

EWEA was disappointed with the final outcome of the conference. “World leaders continued talking in Copenhagen rather than acting”, commented Christian Kjaer, EWEA Chief Executive. “The Copenhagen Accord boils down to a non-binding political agreement based on the lowest common denominator, brokered between the world’s two largest emitters of greenhouse gases. China and the United States went solo in Copenhagen.” EWEA urged world leaders to work on reaching a legally binding international treaty as soon as possible, to cut greenhouse gas emissions by a minimum of 30% by 2020, and the EU to keep on leading the way.

ETS New Entrants Reserve

The New Entrants Reserve (NER300) is a system of 300 million free Emissions Trading System (ETS) allowances that will help finance demonstration projects of innovative renewable energy technology and carbon capture and storage (CCS).

Seven wind projects - including one on grids - will be financed in the first of two calls for proposals to be set up in 2010 and 2013-2014.

EWEA lobbied for a significant share of the funding to go to wind and renewables, as well as on certain elements, such as upfront financing of renewables projects, and a fair and transparent selection process based on project quality and feasibility as well as cost per MWh, and this was often supported by Member States.

The Member States adopted the final text in February 2010.

Environment

EWEA has participated in discussions on a guidance document on offshore wind power and biodiversity protection with the International Union for the Conservation of Nature (IUCN) and others.

EWEA has developed an online Environmental Impact Information Tool. This brings together all published literature on wind energy and the environment. The tool will become publicly available in 2010.

EWEA has worked with the European Commission to ensure that the Guidance Document on Natura 2000 nature protection zones provide clear understandable guidance to national governments and wind power developers.

EWEA working groups

EWEA has five working groups which meet on a regular basis.

- Grid Code Working Group
- Large-Scale Integration Working Group
- Offshore Working Group
- Communication Network
- National Association Network

More on their work in 2009 can be found in the different sections above and below.

Communicating wind

Our main tools

In 2009 EWEA continued communicating that wind power is a popular, mainstream energy technology and a key solution to the emerging energy and climate crisis.

We launched a new communication strategy in December 2009, to focus on using simpler messaging and stronger visualisation, having a more visible presence in the media, taking wind into the political, social and cultural life of EU decision-makers, increasing synergy with EWEA membership and recruiting a wider range of endorsers.

Published five times a year, our magazine *Wind Directions* continues to supply industry, government and media officials with a wide range of articles on issues that are shaping the sector, be they of a European or a global nature.

2009 editions focused on the promising potential for wind power and other renewables around the south Mediterranean, the financial crisis, the providers and consumers of green electricity, offshore wind, and the possible world of 2020 and beyond.

Our monthly members-only electronic newsletter, *Wind Watch,* continues to provide pertinent material on political, scientific and technical events linked to decisions made in the EU capital, as well as on EWEA's activities and events, and the wind industry.

Campaigns and the website

At EWEC in April, we launched a "Count on Wind Energy" campaign, with a leaflet describing a everything wind had done – in terms of power production, emissions reduction, avoided fuel and carbon costs, and so on – in 2008. An electronic counter was set off to count what wind would achieve during the conference.

We also launched two web-based 'splash pages'- one on offshore in September to coincide with the Stockholm conference, and one on climate change in December to coincide with COP15.

The offshore page contained EWEA's offshore declaration (see 'What we do: uniting the wind industry').

In 2008, we continued updating our website (**www.ewea.org**), adding a features section with a key news article to the home page. We also got active on the social networks: EWEA can now be found on Facebook, Twitter and LinkedIn.

Telling our story

EWEA was quoted directly 180 times in 2009. General policy news got the most mentions over the year (400), EWEC 2009 got 100 and Offshore 2009 got 160.

Global Wind Day 2009 got 1,300 different mentions in the press in 2009.

Emerging market strategy

EWEA is organising policy workshops in key emerging wind power markets with national wind energy associations. The workshops cover issues such as how wind energy works, investment opportunities and grid connection.

In 2009, workshops were held in the Czech Republic, Romania, Hungary, Bulgaria and in February 2010 in Turkey.

For more information: **www.ewea.org**.

Global Wind Day

In 2009, EWEA joined forces with the Global Wind Energy Council (GWEC) and many national wind energy associations to coordinate Wind Day events across the globe.

Over 300 events and wind activities were organised in 35 different countries around the official Wind Day date of 15 June.

From wind farm open days to theatre shows, there was something for everyone, everywhere. Tens of thousands of people the world over joined in the celebrations.

Global Wind Day 2010 is taking place on 15 June and looks to be more exciting than ever before!

For more information: **www.globalwindday.org**.


Greece


Japan
横浜実証機
Global Wind Day 2009
JAPAN


Austria


Romania


Spain


The Netherlands

What we do:
uniting the wind industry

The European Wind Energy Conference ("EWEC")

The European Wind Energy Conference & Exhibition ("EWEC") is an annual event which combines a conference covering every key aspect of wind energy, with an extensive exhibition of the leading players.

Over four days, thousands of professionals meet in a European city for networking and professional development.

At EWEC 2009 in Marseille, key-note speakers included EU Energy Commissioner Andris Piebalgs, IEA President Nobuo Tanaka and IPCC Chair Dr Rajendra Pachauri (via video link). EWEC 2009 was chaired by Roland Sundén, CEO of LM Glasfiber.

Sessions covered finance, science, technology, grids, business, markets and the environment, and there were plenty of side events and social events.

EWEC 2010 is taking place from Tuesday 20 to Friday 23 April 2010 in Warsaw. It will be chaired by Xabier Viteri, Chief Executive Officer of Iberdrola Renewables.

EWEA is also organising a conference on grid-related issues this year from 23-24 November, in Berlin.

For more information:
www.ewec2010.info
www.ewea.org/grids2010

The European Offshore Wind Conference

The European Offshore Wind Conference is a biennial event which combines a conference covering every key aspect of the offshore wind market with an extensive exhibition of the leading players.

Key-note speakers at Offshore 2009 in Stockholm included EU Energy Commissioner Andris Piebalgs and Swedish Deputy Prime Minister Maud Olofsson. Offshore 2009 was chaired by Andreas Nauen, CEO of Siemens Wind Power. Sessions covered technology; the financial, supply-related and political requirements of rapid, large scale deployment; and the regulatory and administrative barriers to be overcome.

Offshore 2011 will be held in Amsterdam from 29 November – 1 December.

For more information:
www.offshore2011.info

Photo: top Delcey - Verchere • bottom EWEA - Ek. Eriksson

Joining in:
membership of EWEA

Making the right connections: *Europe's largest network of wind industry professionals*

- Priority invitations to EWEA events.
- Invitation to the "members-only" VIP reception at our annual conference.
- Access to the "members-only" area of the EWEA web site, which contains key information and contact details of all EWEA members.
- Involvement in EWEA policy working groups.

Obtaining key information: *The most comprehensive and informative network in the wind sector*

- Regular copies of reports, electronic newsletters, press releases and policy briefings.
- Fully customised answers to requests.
- Direct access to the EWEA experts and research library.

Getting massive discounts: *Save money as soon as you join*

- A 30% discount on the entrance fee to all EWEA events
- 10% off advertisement in our magazine *Wind Directions.*
- 30% off exhibition space at all EWEA events.
- Discounts off the regular price of advertisement in the EWEC and Offshore exhibition catalogues.

Improve your profile and visibility: *EWEA delivers outstanding business opportunities*

- Web link from EWEA directory to your home page.
- Your organisation highlighted with company profile in our magazine Wind Directions.
- Promotion of your events in *Wind Directions'* event calendar.
- Exclusive use of EWEA branding on your promotional materials and web site.
- Priority booking of exhibition space at all EWEA events.

Influencing policy: *Representation at the highest levels*

- Direct involvement in the policy, promotion and development of European wind power.

For more information on becoming an EWEA member, call Christi Newman on +32 2 400 1056 or email: cn@ewea.org.

EWEA in a nutshell

- EWEA is the voice of the wind industry, actively promoting the utilisation of wind power in Europe and worldwide. It is ideally situated in the EU area of Brussels, ensuring close proximity to European decision-makers.

- As of the end of 2009, EWEA had over 650 members from across Europe and beyond. Members include wind turbine manufacturers, utilities, trade associations and academics.

- EWEA coordinates international policy, research and analysis. It establishes policy positions for the wind industry on key issues, cooperating with industry and research institutions.

- EWEA's lobbying activities help create a suitable legal framework within which members can successfully develop their businesses.

- EWEA produces a large variety of information tools and manages campaigns to raise awareness about the benefits of wind.

- EWEA organises numerous high-profile conferences, exhibitions, seminars and working groups for the benefits of its members and the industry.

Photo: EDF

What we do:
producing new research

In 2009, EWEA published many pieces of new research, all of which are on www.ewea.org.

Reports

- **Pure Power - Wind energy targets for 2020 and 2030**
  EWEA's new wind energy targets for 2020 and 2030.
- **Oceans of Opportunity - Harnessing Europe's largest domestic energy resource**
  The huge potential of offshore wind.
- **Economics of Wind Energy**
  Discusses every financial and economic aspect of wind energy and other power technologies.
- **Integrating Wind**
  Wind energy and the power grid.
- **Wind Energy - The Facts**
  A detailed overview of the wind energy sector.
- **Wind at Work**
  Wind energy and employment.

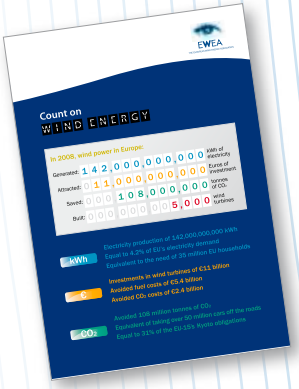
Statistics

- **Wind in power**
  2009 European wind statistics.
- **The European offshore wind industry**
  Key trends and statistics.

Briefings

In 2009, EWEA published four briefings.

- **Action plan briefing: 'Wind Energy: Action Plan for the new European Commission and Parliament'** EWEA sets out the wind industry's priorities for the next four years for the new European Commission and Parliament.
- **Climate change briefing: 'Harness the wind to tackle climate change'** What wind can do to avoid CO_2 and tackle climate change.
- **Low carbon financing briefing: 'Communication on Financing the Development of Low Carbon Technologies (SET-Plan)'** Examining the proposed €6 billion research funding.
- **Counting on wind energy briefing: 'Wind energy: providing certainty at uncertain times'** Quantified examples of how Europe benefits from wind.



Position Papers

- **Harmonising Europe's Grid Codes for the Connection of Wind Power Plants to the Electricity Network**
- **EWEA response on the consultation on the ENTSO-E Work Programme 2010**
- **EWEA response on the consultation on the ERGEG 2010 Work Programme**
- **EWEA response to the ERGEG Public Consultation on the draft revised Guidelines of Good Practise for Electricity Balancing Markets Integration (GGPEBMI)**
- **EWEA response on the consultation on the Green Paper: "Towards a secure, sustainable and competitive European Energy Network"**

Who we are:
your EWEA team

EWEA is a very lively organisation. Over 40 individuals from 19 different countries contribute to the smooth running of the association and to delivering its mission statement.

As stated in its statutes, the association serves the needs of its members through the following activities:

- To strengthen the development of wind energy markets and technology in Europe, and worldwide, in order to allow wind energy to achieve its full potential and contribute to a sustainable energy future. To achieve this the Association works to:
  - develop effective strategic policies and initiatives, and to tackle barriers to allow the full deployment of wind energy; and
  - communicate the benefits and potential of wind energy to politicians, opinion formers, decision makers, the media, the public and other key stakeholders.
- To act as the central network on wind energy issues for its members and stimulate interaction with wider constituencies.
- To promote, through the joint efforts of its members, the best interests of the wind energy sector and act as the single voice of the wind industry.

Activities at EWEA are overseen by the administrative team and managed through three departments: Policy, Communications, and Events, Membership & Sales.

Administration, from left to right:

- **Christian Kjaer**, *Chief Executive Officer*
- **Nathalie Cnops**, *Human Resources Manager;*
- **Thomas Tharakan**, *Bookkeeper*
- **Marika Mazzei**, *Finance Assistant*
- **Mattijs Van Bruwaene**, *Stagiaire*
- **Benoît Duchatel**, *Finance Manager*
- **Carla Van Hende**, *PA to CEO*
- **Bruce Douglas**, *Chief Operating Officer*
- **Kristel Hendrickx**, *Office Administrator & PA to COO*

Email: ewea@ewea.org

Photo: Alexis Haulot

Policy Department, from bottom of the stairs to top:

- **Filippo Gagliardi**, *Project Manager*
- **Nicolas Fichaux**, *Head of Policy Analysis*
- **Justin Wilkes**, *Policy Director*
- **Vilma Radvilaite**, *Regulatory Affairs Advisor*
- **Rémi Gruet**, *Regulatory Affairs Advisor*
- **Laurence Blondeau**, *Administrative Assistant*
- **Dorina Iuga**, *Project Manager*
- **Jacopo Moccia**, *Regulatory Affairs Advisor*
- **Sharon Wokke**, *Project Assistant*
- **Paul Wilczek**, *Regulatory Affairs Advisor*
- **Athanasia Arapogianni**, *Research Officer*
- **Glória Rodrigues**, *Senior Research Officer*

Email: policy@ewea.org

Photo: Alexis Haulot

Communication Department, from left to right:

- **Raffaella Bianchin**, *Head of IT, Web and Design*
- **Simeon Holdship**, *IT Manager & Database Administrator*
- **Julian Scola**, *Communication Director*
- **Paolo Berrino**, *Press & Information Officer*
- **Sarah Azau**, *Senior Communication Officer/Editor*
- **Zoë Casey**, *Communication Officer*
- **Jason Bickley**, *Web Manager*
- **Maria Szumielewicz**, *Stagiaire*
- **Elke Zander**, *Campaigns Officer*
- **Jesús Quesada**, *Graphic Designer*
- **Florian Becker**, *Stagiaire*

Email: communication@ewea.org

Photo: Alexis Haulot

Events, Membership & Sales Department (from left to right, starting at the top):

- **Sanna Heinonen**, *Sales Manager*
- **Christi Newman**, *Sales Manager*
- **Anja Wimmer**, *Head of Event Logistics*
- **Ankiza Gakunu**, *Assistant*
- **Anna Hedrzak**, *Head of Membership & Sales*
- **Aleksandra Nowak**, *Stagiaire*
- **Viviana Ravasi**, *Stagiaire*
- **Malgosia Bartosik**, *Head of Conferences & Events*
- **Amy Parsons**, *Conference Manager*
- **Louise Lilja**, *Assistant*
- **Tim Robinson**, *Event Manager*
- **Luisa Coll**, *Event Manager*
- **Frédérique Lefebvre**, *Assistant*
- **John McSweeney**, *Assistant*

Email: events@ewea.org; marketing@ewea.org; sales@ewea.org

Photo: Alexis Haulot

Who we are:
the EWEA Board of Directors

As a non-profit association, EWEA is governed by a Board of Directors elected by the membership at the AGM. Each Board position has a three-year term. As of the beginning of 2010 there are 43 Board members representing the different membership categories including five executive positions of President, two Vice Presidents, Treasurer and Secretary.

Executive Committee

- President: Prof. Arthouros Zervos, National Technical University Athens
- Vice President: Dr Klaus Rave, Fördergesellschaft Windenergie
- Vice President: Mr Peter Brun, Vestas
- Treasurer: Mr Joaquin Mollinedo, Acciona
- Secretary: Dr Eddie O'Connor, Mainstream Renewable Power

Board of Directors

The Board meets four times a year and is made up of representatives of each membership category.

Associations and Institutions:

- Austrian Wind Energy Association (IG Windkraft Österreich)
- BWEA – British Wind Energy Association
- Danish Wind Industry Association (DWIA)
- Danish Wind Turbine Owners Association
- Dutch Wind Energy Association (NWEA)
- Fördergesellschaft Windenergie (FGW)
- French Wind Energy Association (FEE)
- German Engineering Federation (VDMA)
- German Wind Energy Association (BWE)
- Irish Wind Energy Association (IWEA)
- Italian Wind Energy Association (ANEV)
- National Technical University Athens
- Spanish Association of Renewable Energy Producers (APPA)
- Spanish Wind Energy Association (AEE)
- Swedish Wind Energy Association (Svensk Vindenergi)

Corporate Board members:

- ABB
- Acciona Energia
- Airtricity
- Alstom Wind/Ecotècnia
- Ballast Nedam Offshore Energy
- Dexia Crédit Local
- DONG Energy
- ECN – Energy Research Centre of the Netherlands
- EDF Energies Nouvelles
- EDP Renováveis
- EnBW Erneuerbare Energien
- E.ON Climate and Renewables
- ForWind – University of Oldenburg
- Gamesa Energia
- Garrad Hassan and Partners
- GE Energy
- Iberdrola Renovables
- Mainstream Renewable Power
- Nordex
- Renewable Energy Systems
- REpower Systems
- Risø / DTU
- RWE Innogy
- Siemens Wind Power
- Suzlon Energy
- Vattenfall
- Vergnet
- Vestas Wind Systems

2009: the highlights

January

- EWEA launches a report: 'Wind at Work – wind energy and job creation in the EU'. The report predicts that wind jobs would double by 2020 to reach 325,000.
- EWEA welcomes the European Commission's proposed economic recovery plan, proposing €500 million for offshore wind.

February

- EWEA releases its annual statistics, showing more wind power was installed in 2008 than any other power generating technology, making up 36% of new installations.
- The European Council endorses the Commission's Strategic Energy Review, with its commitment to develop a blueprint for a North Sea grid.

March

- The 2009 European Wind Energy Conference is held in Marseille, with over 7,500 participants, an exhibition covering 10,000m^2 and featuring 390 companies.
- At EWEC, EWEA launches its new report 'The Economics of Wind Energy', which provides a detailed insight into wind energy economics and compares the costs of wind to those of other power-generating technologies.
- EWEA announces that growing funding from utilities' strong balance sheets is keeping the wind sector buoyant despite the financial crisis.
- EWEA increases its 2020 target for installed wind energy capacity in the EU from 180 GW to 230 GW, including 40 GW offshore.

April

- EU internal power market liberalisation package is adopted by the European Parliament. EWEA encourages Member States to choose the package's full unbundling option to allow an internal energy market to develop.

May

- The EU Recovery Plan is agreed by the institutions, allocating €565 million to offshore wind energy projects, and part of €3.98 billion for energy projects to Europe's power grids and the first stage of a 'supergrid'. EWEA is pleased with the result.

June

- The first ever Global Wind Day is held, with tens of thousands of people joining in over 200 events and activities in 35 different countries.
- A Memorandum of Understanding on a Baltic Energy Market Interconnection Plan is signed by Heads of State and the European Commission. EWEA welcomes this as a step towards a future pan-European electricity grid in the Baltic region.
- The European Commission publishes its template for the National Renewable Energy Action Plans (NREAP).

July

- EWEA applauds UN Secretary-General Ban Ki-moon's strong message to world leaders on climate change at the G8 meeting in Italy.

August

- EWEA publishes new research estimating that 8,600 MW of new wind energy capacity will be installed in the EU-27 in 2009: an annual growth rate of 1% compared to 2008.

September

- The European Offshore Wind Conference 2009 takes place. EWEA publishes 'Oceans of Opportunity', showing planned offshore wind farms would supply 10% of Europe's power needs.
- The report contains EWEA's plan for how the power grid should be developed over 20 years.
- EWEA launches a pledge that commits businesses to ensure sufficient equipment for offshore and calls on EU and Member States to resolve obstacles to offshore development.

October

- The Irish vote yes vote on the Lisbon Treaty.
- The European Commission proposes a €6 billion increase in funding for wind research in its Communication on low carbon financing. EWEA applauds this as a wise investment.
- EWEA releases a climate change briefing in the run-up to COP15 saying wind energy should avoid the emission of 333 million tonnes of CO_2 per year by 2020.

November

- The EU-US summit held at the beginning of the month gives birth to a transatlantic energy council.
- The new EU Commissioners are nominated, with German Günther Oettinger proposed for energy.

December

- EWEA launches updated Pure Power report, containing new targets of 230 GW of wind energy in 2020 and 400 GW in 2030.
- EWEA takes part in COP15, which ends in a non-legally binding Accord.

www.ewea.org

About EWEA

EWEA is the voice of the wind industry, actively promoting the utilisation of wind power in Europe and worldwide.
It now has over 650 members from almost 60 countries including manufacturers with a 90% share of the world wind power market, plus component suppliers, research institutes, national wind and renewables associations, developers, electricity providers, finance and insurance companies and consultants.

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