EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION

30 YEARS GROWING TOGETHER

Thirty years growing together

The European Wind Energy Association

Annual Report 2011

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.

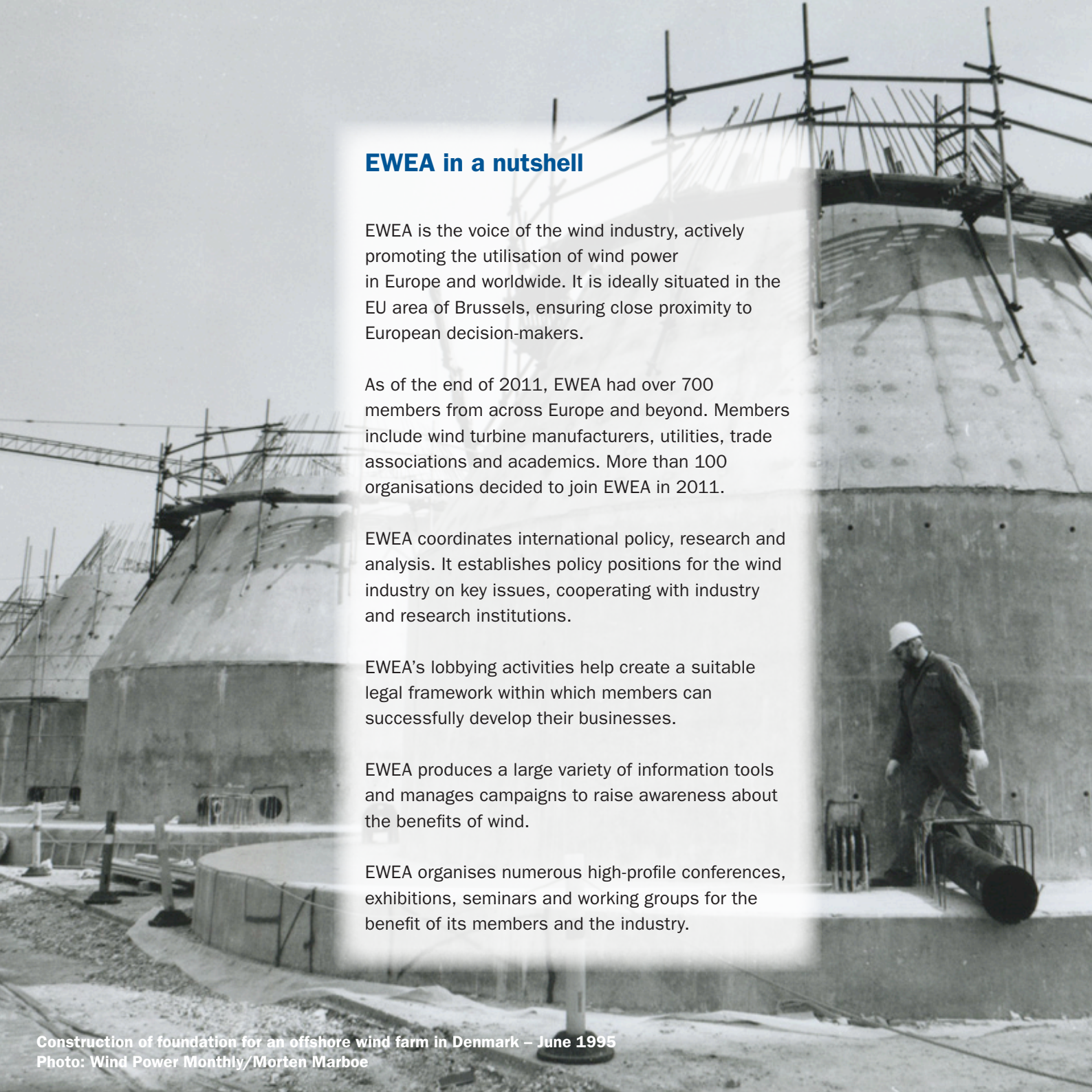
As of the end of 2011, EWEA had over 700 members from across Europe and beyond. Members include wind turbine manufacturers, utilities, trade associations and academics. More than 100 organisations decided to join EWEA in 2011.

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 benefit of its members and the industry.



Construction of foundation for an offshore wind farm in Denmark – June 1995
Photo: Wind Power Monthly/Morten Marboe

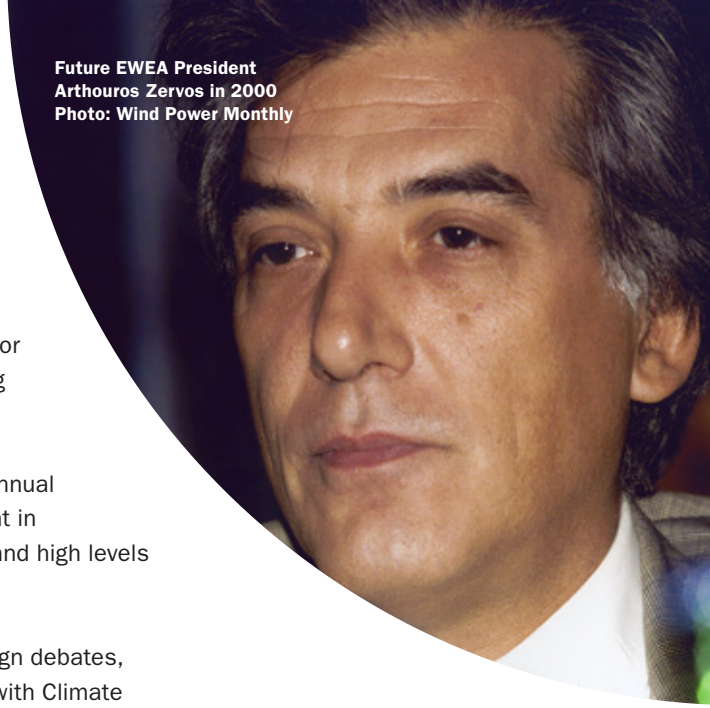
Foreword

For the past 30 years, EWEA has supported the development of the wind energy sector, which in that time has grown from a fledgling “alternative” technology to a major European industry. When EWEA was established back in 1982, just over 100 MW of wind power capacity was operating in Europe. In this year when we celebrate the Association’s 30 year anniversary, European wind power capacity will pass 100,000 MW. Globally, over the last three years our industry installed new wind farms producing electricity equivalent to more than 45 nuclear reactors, or the equivalent of 1.3 new nuclear reactors per month. We have indeed come a long way in three decades.

As we start looking forward to the next 30 years and what they might hold, it is a good time to reflect on achievements and failures, strengths and weaknesses, of what’s been done so far. An annual report is the perfect opportunity to assess a year’s work and to make plans for the future. The current European debate on where our energy will come from in 2050 provides an appropriate political framework for these discussions.

In 2011, wind energy investments remained stable at nearly 10 GW of new capacity in Europe. Stable is good these days, and it is clear that the financial crisis and the worsening economic distress in many European countries is having an effect on our industry. In a situation where there is a need in the European power sector to replace fuel and operating cost with capital cost, the increasing scarcity of finance is a challenge. The crisis situation will improve, and the medium term outlook remains bright. But we must be aware of the short term challenges.

That said, many steps forward were taken for the European wind industry in 2011. In March 2011, EWEA spearheaded a call for 2030 binding renewables targets, arguing that they are essential to maintain investor confidence in the wind energy sector. In December, at the launch of the European Commission’s Energy Roadmap 2050, which showed that wind energy would be the leading generating technology by 2050, Energy Commissioner Oettinger stated that binding 2030 renewable energy targets should be discussed now and lead to a decision by 2014.



Future EWEA President Arthouros Zervos in 2000
Photo: Wind Power Monthly

The European Commission also published draft legislation on energy infrastructure. If passed, this should speed up and finance priority grid upgrades. Running alongside the negotiations on the legislation, EWEA's campaign, 'Free movement of electricity', called for a Europe-wide and offshore energy grid, and a functioning single energy market.

In 2011, two major EWEA events took place: the EWEA Annual Event in Brussels and the biennial EWEA OFFSHORE event in Amsterdam. Both events saw thousands of participants and high levels of debate and business.

EWEA organised a range of policy workshops and campaign debates, including a debate on a 30% emissions reduction target with Climate Action Commissioner Connie Hedegaard, Chairman of the European Parliament Environment Committee Jo Leinen, and Danish Minister for Climate and Energy, Martin Lidegaard as participants.

We were also involved in several EU-funded projects, published a range of new reports and reached out to wider audiences through our magazine, *Wind Directions*, blog on **www.ewea.org/blog**, press and social media work and a whole range of activities across the planet around 15 June, Global Wind Day.

In 2011, as in all of the 30 years of EWEA's existence, we have worked hard to influence the development of wind energy in the EU and provide good framework conditions for the sector to invest in. In the next 30 years – and beyond – we will continue to do so, growing and evolving together with our members.

Arthouros Zervos
President

Christian Kjaer
CEO

Key facts

wind power installed in Europe by end of 2011

European Union: 93,957 MW
Candidate Countries: 1,930 MW
EFTA: 565 MW
Total Europe: 96,607 MW

	Installed 2010	End 2010	Installed 2011	End 2011
EU Capacity (MW)				
Austria	19	1,014	73	1,084
Belgium	325	886	192	1,078
Bulgaria	322	500	112*	612*
Cyprus	82	82	52	134
Czech Republic	23	215	2	217
Denmark	315	3,749	178	3,871
Estonia	7	149	35	184
Finland	52	197	0	197
France	1,396	5,970	830*	6,800*
Germany	1,493	27,191	2,086	29,060
Greece	238	1,323	311	1,629
Hungary	94	295	34	329
Ireland	82	1,392	239	1,631
Italy	948	5,797	950*	6,747*
Latvia	2	30	1	31
Lithuania	72	163	16	179
Luxembourg	1	44	0	44
Malta	0	0	0	0
Netherlands	56	2,269	68	2,328
Poland	456	1,180	436	1,616
Portugal	171	3,706	377	4,083
Romania	448	462	520	982
Slovakia	0	3	0	3
Slovenia	0	0	0	0
Spain	1,463	20,623	1,050	21,674
Sweden	604	2,163	763	2,907
United Kingdom	1,005	5,204	1,293	6,540
Total EU-27	**9,648**	**84,650**	**9,616**	**93,957**
Total EU-15	**8,144**	**81,571**	**8,409**	**89,670**
Total EU-12	**1,504**	**3,079**	**1,208**	**4,287**
Of which offshore and near shore	883	2,944	866	3,810

* Provisional
** Former Yugoslav Republic of Macedonia
*** Figure not communicated

	Installed 2010	End 2010	Installed 2011	End 2011
Candidate Countries (MW)				
Croatia	61	89	42	131
FYROM**	0	0	0	0
Serbia	0	0	0	0
Turkey	528	1,329	470	1,799
Total	**589**	**1,418**	**512**	**1,930**
EFTA (MW)				
Iceland	0	0	0	0
Liechtenstein	0	0	0	0
Norway	18	436	84	520
Switzerland	25	42	3	46
Total	**43**	**478**	**87**	**565**
Of which offshore and near shore	0	2	0	2
Other (MW)				
Faroe Islands	0	4	0	4
Ukraine	1	87	66	151
Russia	0	9	n/a***	n/a***
Total	**1**	**101**	**66**	**164**
Total Europe	**10,280**	**86,647**	**10,281**	**96,607**

Note: Due to previous year adjustments, 216.03 MW of project de-commissioning, re-powering and rounding of figures, the total 2011 end-of-year cumulative capacity is not exactly equivalent to the sum of the 2010 end-of-year total plus the 2011 additions.


4
FO
520
NO
2,907
SE
197
FI
184
EE
n/a
RU
31
LV
179
LT
3,871
DK
1,631
IE
6,540
UK
2,328
NL
1,078
BE
44
LU
29,060
DE
1,616
PO
217
CZ
151
UA
3
SK
1,084
329
982
RO
46
CH
6,800
FR
131
AT
HU
6,747
IT
HR
612
BG
4,083
PT
21,674
ES
1,629
GR
1,799
TR
134
CY
>15,000 MW
1,000 - 15,000 MW
100 - 1,000 MW
0 - 100 MW

2011 the highlights

January

- EWEA published its 2010 statistics. Offshore wind energy grew by a record 51% in 2010, but despite this wind energy installations overall were down slightly, with 9.3 Gigawatts (GW) of capacity added, reaching a total of 84 GW.
- EWEA also released its analysis of Members States' national action plans for renewables, which showed they should exceed the 20% renewables target by 2020.

February

- In February, EWEA launched a statement with 20 signatories, calling on EU heads of state to create a single market for electricity by 2015, 25 years after the Single European Act was agreed.

March

- The European Commission published a communication on the road to a low carbon economy by 2050. EWEA said the first step must be a 30% domestic emissions reduction target for 2020 and agreed with the Roadmap's suggestion that a 93-99% cut in CO_2 emissions in the power sector by 2050 is essential to achieve 80% reduction in Europe's overall greenhouse gas emissions.
- From 14-17 March, EWEA's 2011 Annual Event took place in Brussels. EWEA launched its call for 2030 renewable energy targets on the opening day. Altogether, 9,000 people attended the event.

April

- EWEA released figures showing that at the end of 2010, wind energy across the world was achieving 26% of the emissions reductions required from industrialised countries under the Kyoto protocol.

May

- The European Commission released an analysis on moving beyond a 20% emissions reduction target in 2020. EWEA responded with a briefing on the benefits of a 30% target.
- The Environment Committee (ENVI) voted in favour of increasing the EU's greenhouse gas emission reduction target to 30% by 2020.
- The UN Intergovernmental Panel on Climate Change (IPCC) published its Special Report on Renewable Energy Sources. The report serves as the world's most credible source on renewables and concluded that the total global potential for renewable energy "is substantially higher than both current and future projected global energy demand".

June

- Global Wind Day took place on 15 June with events around the world from painting competitions to wind farm open days. To highlight the power of the wind EWEA published figures showing that in 2020 wind power will avoid €87 billion of fuel costs.
- The European Commission published its draft EU budget proposal for 2014-2020. EWEA's first public debate on green jobs took place.

July

- EWEA released its half-yearly offshore statistics. They showed a 4.5% increase in installations of offshore capacity compared to the first half of 2010, with 101 new offshore wind turbines coming online.

August

- New scenarios were published by EWEA, predicting that wind energy would more than triple its power output by 2020, becoming equivalent to the total consumption of all households in France, Germany, Poland, Spain and the UK, provided a post-2020 policy framework is put in place.

September

- EWEA's new campaign, 'Free movement of electricity' was launched. The main focus was a declaration with Eurelectric, Europacable and a range of other supporters calling on EU heads of state to speed up progress to a Europe-wide power grid and a single market for electricity. The campaign website was launched: **www.freedomforelectricity.eu**.

October

- The results of the EU-funded OffshoreGrid project – in which EWEA was a partner – revealed that interconnected offshore grids will cost at least €14 billion less than connecting wind farms individually to shore.
- The European Commission published draft EU legislation on energy infrastructure. This included €9.1 billion for priority projects, and plans to speed up grid permits. However, EWEA pointed out that it was not clear how the money would be divided between different types of energy infrastructure.
- The European Parliament voted to create a dedicated budget line for wind energy research and development for the first time.

November

At a debate with EU Climate Commissioner Hedegaard, EWEA launched a report revealing that by 2020, the EU wind industry would avoid 342 million tonnes of CO_2, equivalent to 31% of the EU's target of reducing emissions by 20%.

EWEA OFFSHORE 2011 took place in Amsterdam, with 8,200 participants. EWEA released its offshore report, showing that over 141 gigawatts (GW) of offshore wind energy capacity is built or planned in Europe: enough to provide 13.1% of Europe's electricity.

The European Commission published draft legislation on EU research and innovation – Horizon 2020. This will be the main financial tool to support wind energy technology development.

The European Commission published its proposal for the R&D budget from 2014 to 2020. EU funds for non-nuclear energy R&D doubled to €6.5 billion, but were still far from enough to fund what the European Commission says is necessary to achieve its 2020 targets.

December

The EU Energy Roadmap 2050 was launched, with EU Energy Commissioner Oettinger suggesting binding renewable energy targets for 2030 could be in place by 2014. All the scenarios in the Roadmap had wind energy producing the most electricity by 2050, and all of them, including a High Renewables Scenario, showed similar overall system costs.

Turbine operation and maintenance, California, August 1981
Photo: Wind Power Monthly/Micon Wind Turbines Inc

What we want
EWEA's objectives

- The Renewable Energy Directive and post-2020 legislation
- Electricity infrastructure and power markets
- Offshore wind
- Research
- Climate change
- Communicating wind

What we want
EWEA's objectives

EWEA's strategy "Wind Power: Europe's Competitive Advantage" was agreed by the EWEA Board in February 2009. It followed the agreement in December 2008 on the EU Climate and Energy Package, including the Renewable Energy Directive, which forms wind energy's main European legislative instrument up to 2020 and sets binding renewable energy targets for EU countries. The Strategy centres on six strategic and political areas.

1. The Renewable Energy Directive and post-2020 legislation

Ensure the 2009 Renewable Energy Directive and National Renewable Energy Action Plans are properly implemented in the Member States.

Analyse the wind energy sector's needs post-2020 and prepare for a post-2020 regulatory framework for wind, based on 100% renewable electricity by 2050.

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 fair grid access and a single electricity market can be created.

Ensure EU legislation is adopted ensuring that power infrastructure is planned, and developed with large-scale wind energy in mind.

Fight for power investors to be fully exposed to carbon and fuel price risk, through improved electricity market competition and market reforms. 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 adequate offshore grids.

Ensure the European Union and national governments 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 funding for research 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.

EWEC conference and exhibition, Greece, 1994
Photo: Wind Power Monthly/Ole Haugsted

What we do

The voice of the industry

- The EWEA Annual Event
- EWEA OFFSHORE 2011
- Other events

What we do
The voice of the industry

The EWEA Annual Event

EWEA's Annual Event combines a conference covering every key aspect of wind energy with an extensive exhibition of the leading players.

EWEA 2011 was held from 14 to 17 March in Brussels, and attended by 9,000 people.

Sessions covered finance, science, technology, grids, business, markets and the environment, and there were plenty of side events and social events. Keynote speakers included the Danish Energy and Climate Minister, the Portuguese Secretary of State for Energy and the Hungarian Climate Change Deputy State Secretary.

The EWEA Annual Event 2012 was held in Copenhagen from 16 to 19 April 2012: **www.ewea.org/annual2012**. The EWEA Annual Event 2013 will be held in Vienna from 4 to 7 February: **www.ewea.org/annual2013**

OFFSHORE

EWEA OFFSHORE 2011

Every two years, EWEA organises a conference and exhibition on offshore wind energy.

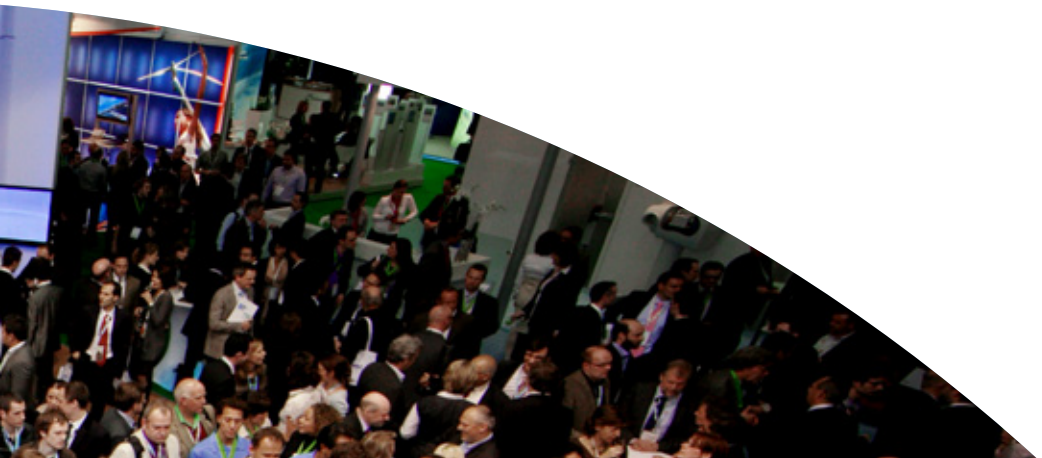
OFFSHORE 2011 was held from 30 November to 2 December in Amsterdam, and attended by 8,200 people.

Sessions looked at finance, research, policy, innovation, building bigger turbines, the supply chain and more. Speakers included a wide range of CEOs from leading industry companies.

EWEA OFFSHORE 2013 will be held in Frankfurt on 19-21 November 2013: **www.ewea.org/offshore2013**

Other events

EWEA organised around 17 smaller events last year, including policy workshops from Bulgaria to Hungary, public debates on issues such as emissions reduction targets, and its first ever technology workshop – on wind resource assessment – in Brussels.



EWEA membership benefits

Making the right connections:

- Priority invitations to EWEA events.
- Invitation to the “members-only” VIP reception at EWEA Annual Event.
- Access to the Members Lounge, 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:

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

Getting massive discounts:

- over 30% discount on the conference pass fee to all EWEA events
- 10% off advertisement in our magazine Wind Directions.
- 30% off exhibition space at all EWEA events.

Improve your profile and visibility:

- Web link from EWEA directory to your homepage.
- 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.

For more information on becoming an EWEA member, contact Christi Newman at cne@ewea.org.

Did you know?

Everything EWEA has done as the voice of the wind energy industry for the last 30 years – and continues to do – is thanks to its members and the events it organises! All the income generated at EWEA events, and the membership fees, go directly back into EWEA's policy and communications work, enabling us to work in the best interest of the industry at EU level.

BBC reporting on wind energy in in Denmark, 1980s
Photo: Wind Power Monthly/Roland Petersen

What we do

Making the voice of the industry heard

- The Renewable Directive and post-2020 legislation
- Electricity and power markets
- Offshore wind
- Research and financing
- Climate change
- Communicating wind

What we do

Making the voice of the industry heard

The renewable energy directive and post-2020 legislation

A post-2020 policy framework is urgently needed in the EU: the centrepin of this must be a binding renewables target for 2030 to maintain investor stability and growth in the sector.

EWEA's analysis of the Member States' national renewable energy action plans, released in January, showed that they were on track to slightly exceed the 2020 target of 20% renewable energy. EWEA has been working with its national associations to implement the directive.

In March, on the opening day of the EWEA 2011 Annual Event, EWEA launched a call for a post-2020 policy framework at EU level with a 2030 binding renewables target at its core, to give investors continued stability. It followed this up with a report on 'EU Energy Policy to 2050'.

In the next few months, EWEA worked with the European Commission to influence its EU Energy Roadmap 2050 and released both a report on EU energy policy post-2020 and its updated scenarios for wind energy in 2020 and 2030. Over that time, two EU Commissioners – Climate Action Commissioner Hedegaard and Energy Commissioner Oettinger – referred to the need for a discussion on a possible 2030 renewables target.

In December, the European Commission's EU Energy Roadmap 2050 was released. At the launch Commissioner Oettinger suggested that binding renewable energy targets for 2030 could be in place by 2014. In all the scenarios in the Roadmap, wind energy produces the most electricity by 2050, and all of them, including the High Renewables Scenario, show similar system costs despite some highly unrealistic assumptions in all scenarios such as oil prices dropping from over $100 per barrel today to $70 per barrel in 2050. "Despite these attempts to prefabricate the results, the scenarios confirm

that a renewable energy future comes at no higher energy cost to Europe," EWEA CEO, Christian Kjaer commented.

The European Council and Parliament must now mandate the Commission to draw up binding renewable energy targets for 2030, said EWEA.

Electricity infrastructure and power markets

A fully connected power grid and a single market in electricity are required in order to bring more wind energy online – transporting it from where it is produced to where it is consumed – and improve Europe's energy security.

In February, EWEA launched a statement with 20 signatories, calling on EU heads of state to create a single market for electricity by 2015, 25 years after the single market was created. In March, the EU Member States agreed that an internal energy market should be created by 2014.

In April, EWEA released a pamphlet on the importance of the single market. In September, it launched a new campaign, 'Free movement of electricity'. The main focus was a declaration with Eurelectric, Europable and a range of supporters calling on EU heads of state to speed up progress to a Europe-wide power grid and a single market for electricity. A campaign website was created: **www.freedomforelectricity.eu**.

In October, the results of the EU-funded OffshoreGrid project – in which EWEA was a partner – revealed that interconnected offshore grids will cost at least €14 billion less than connecting wind farms individually to shore.

The ten countries involved in the North Seas' Countries Offshore Grid Initiative continued working throughout the year together towards a power grid in Europe's northern waters; an initiative fully supported by EWEA.

Supported by its Working Group on grid codes (see box on p. 37), EWEA gave its input on various draft pilot codes for electricity grid connection and maintains a continuous dialogue with the EU transmission system operator body ENTSO-E on this topic. The final pilot code was published in October. The network code should ultimately lead to a gradually harmonised set of grid connection requirements in all Member States.

EWEA also became a member of a stakeholder group on capacity allocation and congestion management, set up by the ENTSO-E and provided input in its deliberations on a network code, organising a stakeholder workshop on the code in October.

In November, the European Commission published draft EU legislation on energy infrastructure, on which EWEA had provided input with the help of its large-scale integration working group.

This included €9.1 billion for priority projects, and plans to speed up grid permits. However, EWEA pointed out that it was not clear how the money would be divided between different types of energy infrastructure.

Offshore wind

A stable and clear legislative framework as well as a Europe-wide offshore grid and sufficient public financing are essential for offshore wind energy to tap its potential and reach at least 40 GW by 2020.

In January, EWEA published its 2010 offshore wind energy statistics. Offshore wind energy grew by a record 51% in 2010, reaching 2,964 MW in total – enough to supply 2.9 million average homes with electricity.

By July, when EWEA released its half-yearly offshore statistics, total installed capacity had reached 3,294 MW. They showed a 4.5% increase in installations of offshore capacity compared to the first half of 2010, and more variation in types of financing.

In September, the EU-funded Windspeed project, for which EWEA was on the advisory board, published a map showing that going further from shore can increase wind energy capacity by two to five times.

With its offshore wind advisory group (see box on p. 37), EWEA published a note on ports infrastructure in November, saying ports investment was crucial to support offshore wind energy development.

Throughout the year, EWEA continued working as a partner on the SEANERGY 2020 project, which aims to develop effective planning of the sea space, or 'maritime spatial planning'.

In November to December, EWEA OFFSHORE 2011 took place in Amsterdam, with 8,200 participants. EWEA released its offshore report, 'Wind in our Sails', showing that over 141 Gigawatts (GW) of offshore wind energy capacity is built or planned in Europe: enough to provide 13.1% of Europe's electricity. EWEA also reviewed its offshore wind map based on contributions from its offshore wind advisory group.

Research and financing

Increased EU public funding is needed in wind energy R&D. The European Wind Initiative must be fully financed and implemented.

The 2011 EU budget allocated higher funds to energy research than in 2010, but failed to direct money specifically to the EU's Strategic Energy Technology Plan (SET-Plan), which has wind energy as one of the six low-carbon technologies it supports.

Throughout the year, the 2012 EU budget was negotiated in the institutions, with EWEA working to have more funding for renewables and renewable energy research, including

a dedicated budget line for the European Wind Initiative (EWI – see box on p. 33). The European Parliament supported EWEA's calls, voting in October to create a dedicated budget line for wind energy research and development for the first time ever.

In December, the 2012 budget was adopted; the European Parliament had included a 7.7% increase on energy research spending commitments, but the Council significantly cut many budget lines relating to energy research, and the dedicated budget line for wind energy was removed.

The EU's research budget for 2014-2020 was proposed by the European Commission. In the proposal, EU funds for non-nuclear energy R&D were doubled to €6.5 billion, but were still far from enough to fund what the European Commission says is necessary to achieve its 2020 targets. The European Parliament and the Council will have to agree on this package by mid-2013. EWEA will concentrate its lobby activities on increasing funding for renewables and in particular on securing €1.3 billion for wind energy R&D.

Member States can also spend Cohesion funds – which aim to help the less-favoured regions of the EU – on wind energy projects. In October, the European Commission made a proposal for the Cohesion Policy 2014-2020, which doubled funds for renewables and energy efficiency, taking them to €17-18 billion. The European Parliament and the Council will have to agree on this package by 2013. EWEA will lobby to ensure the increased amount for renewables.

Climate change

A 30% emissions reduction target is needed in the EU for 2020. The Emissions Trading System must be tightened. An ambitious international climate deal must be negotiated.

In January, EWEA successfully asked the EU to ban the use of credits in the Emissions Trading System for the greenhouse gas HFC23, which should make the ETS more efficient and promote wind projects in developing countries.

In March, EWEA launched its call for a 30% emissions reduction target by 2020 - and for a cap on carbon emissions from new power plants after 2015 - to ensure a carbon-free power sector by 2050, allowing the EU to meet its pledge to cut emissions by 80-95% by 2050.

In October, EWEA launched a report on wind energy and EU climate policy at a public debate it organised featuring EU Climate Action Commissioner Hedegaard, Danish Energy and Climate minister Martin Lidegaard and MEP Jo Leinen. The report revealed that by 2020, the EU wind industry would avoid 342 million tonnes of CO_2, equivalent to 31% of the EU's current target of reducing emissions by 20%.

With the Global Wind Energy Council (GWEC), EWEA participated in the international climate negotiations, calling for ambitious action. In Durban at the UN climate change conference COP-17 in December, governments extended the Kyoto Protocol until 2017, but postponed adoption of meaningful objectives and an agreement on climate change until 2015. The agreement would only come into effect in 2020.

EWEA was disappointed by the outcome, calling it a failure.

Communicating wind

Our main tools

In 2011, EWEA continued communicating that wind power is a popular, mainstream energy technology and a key solution to the emerging energy and climate crisis.

We continued following the communication strategy launched in December 2009, which focuses 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.

Magazine and newsletters

A readers' survey was organised for EWEA's members-only newsletter *Wind Watch*. Results were generally very good, with every aspect of the newsletter being rated "good" or "very good". *Wind Watch* continues to provide a monthly e-news service to EWEA members only with in-depth policy and industry content.

Subscriptions to EWEA's magazine *Wind Directions* continued to rise, with a print run of 7-8,000 and the electronic version being sent to EWEA's 27,000 contacts. In 2011 *Wind Directions* focused on Brazil, in 'Blown Away by Brazil'; on the need for 2030 targets in 'Keeping the Momentum', Portugal in 'The rising wind energy star', on 'Nurturing public acceptance' and on offshore in 'Into the Sea'.

Press and media

Members of EWEA's Communication Network (CONE) get copies of EWEA's press releases in advance and under embargo. EWEA sent out 31 press releases in 2011.

EWEA organised a press conference and press releases around EWEA 2011 in Brussels and OFFSHORE 2011 in Amsterdam, which got several hundred mentions online and in print media.

In 2011 EWEA activities were covered by many leading newspapers, TV, Radio stations and news agencies. These included the Financial Times, International Herald Tribune, New York Times, the Guardian, Frankfurter Allgemeine Zeitung, Die Welt, Berliner Morgenpost, AFP, Reuters, Reuters Deutscher Dienst, dpa, Bloomberg, Gazeta Wyborcza, Windpower Monthly and the Irish national TV RTE.

EWEA organised a journalist trip in June, to Denmark and Germany. This was followed by substantial reporting in the Financial Times, Financial Times Deutschland, and a three page special report in Belgian financial newspaper L'Echo.

Campaigns

EWEA's 'Breath of Fresh Air' campaign came to an end at the EWEA Annual Event in Brussels, with joint campaign-event advertising banners all around Brussels, including in the EU quarter, train stations and airport. This ensured very high visibility with more than 1,000,000 views in total. Campaign contest winners visited wind farms in Denmark and Switzerland.

In September, EWEA's new campaign, 'Free movement of electricity', was launched, alongside a workshop on energy infrastructure attended by 125 people. The main focus of the campaign is a declaration with Eurelectric, Europacable and a range of supporters calling on EU heads of state to speed up progress to a Europe-wide power grid and a single market for electricity. A campaign website was designed: **www.freedomforelectricity.eu**. The statement was translated and presented to energy ministers ahead of the Energy Council on 14 February 2012.

In June, Global Wind Day 2011 saw hundreds of events all over the world – from wind farm open days to open-air concerts at the foot of wind turbines. The number of events and activities organised by Global Wind Day partners remained stable at around 230, but the quality of the events was raised considerably.

EWEA provided European partners with gadgets and organised a public debate on 'EU energy policy after 2020', moderated by Fiona Harvey of The Guardian, with MEP Claude Turmes, Folker Franz from BUSINESSEUROPE, Josche Muth from the European Renewable Energy Council and Niels Ladefoged from Commissioner Hedegaard's cabinet as speakers.

EWEA also organised a 'wind parade' of street artists in the European quarter on 15 June, Global Wind Day.

Website and social media

The EWEA website traffic peaked at nearly 13,000 visitors during the week of EWEA 2011 and 11,000 during the week of Offshore 2011. In total, over 438,000 visitors came to the site in 2011.

Visits to EWEA's blog on **www.ewea.org/blog**, grew considerably: the blog now gets between 3,000 and 5,000 a month, up from 2,000 in 2010.

EWEA started working much more intensively on its social media presence. Its Facebook profile was set up in September 2009, and since then nearly 3,500 people have "liked" EWEA, meaning they subscribe to its news and content. Around 5,800 people now follow EWEA on Twitter, with around 50 new followers joining per week. On professional network LinkedIn, EWEA has over 5,000 members on its discussion page.

Corporate ID

EWEA strengthened its corporate identity in 2011, linking EWEA and EWEA events more closely. Publications, advertisements and other materials are now designed to a higher standard and in a more consistent way. A specific design was developed for the 'Free movement of electricity' campaign.

What is the European Wind Initiative?

The ‘EWI’ is the result of several years of joint effort by the European wind energy sector (represented by the European Wind Energy Technology Platform – TPWind), the European Commission and EU Member States, aiming to:

- maintain Europe’s technology leadership in both onshore and offshore wind power;
- make onshore wind power the most competitive energy source by 2020, with offshore wind power following by 2030;
- enable wind energy to supply 20% of Europe’s electricity in 2020, 33% in 2030;
- create 250,000 new skilled jobs in the EU in the wind energy sector by 2020.

The EWI was set up as part of the EU’s Strategic Energy Technology plan (SET-Plan) which aims to help develop low-carbon technologies. It is managed from the wind energy industry side by TPWind – a network and R&D forum for researchers and wind stakeholders, chaired by Henning Kruse of Siemens and run by EWEA, Risoe/DTU and GL Garrad Hassan.

EWEA and EU-funded projects

Several EU-funded projects EWEA was involved in came to an end in 2011 or the first few months of 2012

UpWind

In March, the results of the EU-funded UpWind project were published, showing 20 MW turbines are feasible, but they need a new, tailored design.

More information: www.upwind.eu

Supported by SIXTH FRAMEWORK PROGRAMME

OffshoreGrid

In November, the results of the OffshoreGrid project were published, showing that connecting wind farms together rather than individually to shore could result in significant savings.

More information: www.offshoregrid.eu

Supported by INTELLIGENT ENERGY EUROPE

SEANERGY 2020

The project will recommend how to develop maritime spatial planning policy (MSP) for a better deployment of offshore renewable power generation. It will study ways through which MSP can be better coordinated to help reach the 20% by 2020 renewables target and consider development of grid infrastructure.

Running time: 01 May 2010 to 30 April 2012

More information: www.seanergy2020.eu

Supported by INTELLIGENT ENERGY EUROPE

EWEA is coordinating and participating in several ongoing EU-funded projects

TWENTIES

Twenties is looking at how to operate grid systems with large amounts of wind and other renewables via demonstration projects.

Running time: April 2010 – March 2013

More information: www.twenties-project.eu

Supported by SEVENTH FRAMEWORK PROGRAMME

European Wind Energy Technology Platform

TOPWind

The "Technology platform Operational Programme Wind" (TOP Wind) follows on from the Windsec project and provides EU funding to the Secretariat of the European Wind Energy Technology Platform (TPWind), which is hosted by EWEA. TPWind is a network of EU wind energy R&D experts and an advisory board for EU Institutions and Member States on wind energy research.

Running time: 1 February 2011 – 31 January 2014

More information: www.windplatform.eu

Supported by SEVENTH FRAMEWORK PROGRAMME

EERA DTOC THE EUROPEAN ENERGY RESEARCH ALLIANCE DESIGN TOOLS FOR OFFSHORE WIND FARM CLUSTER

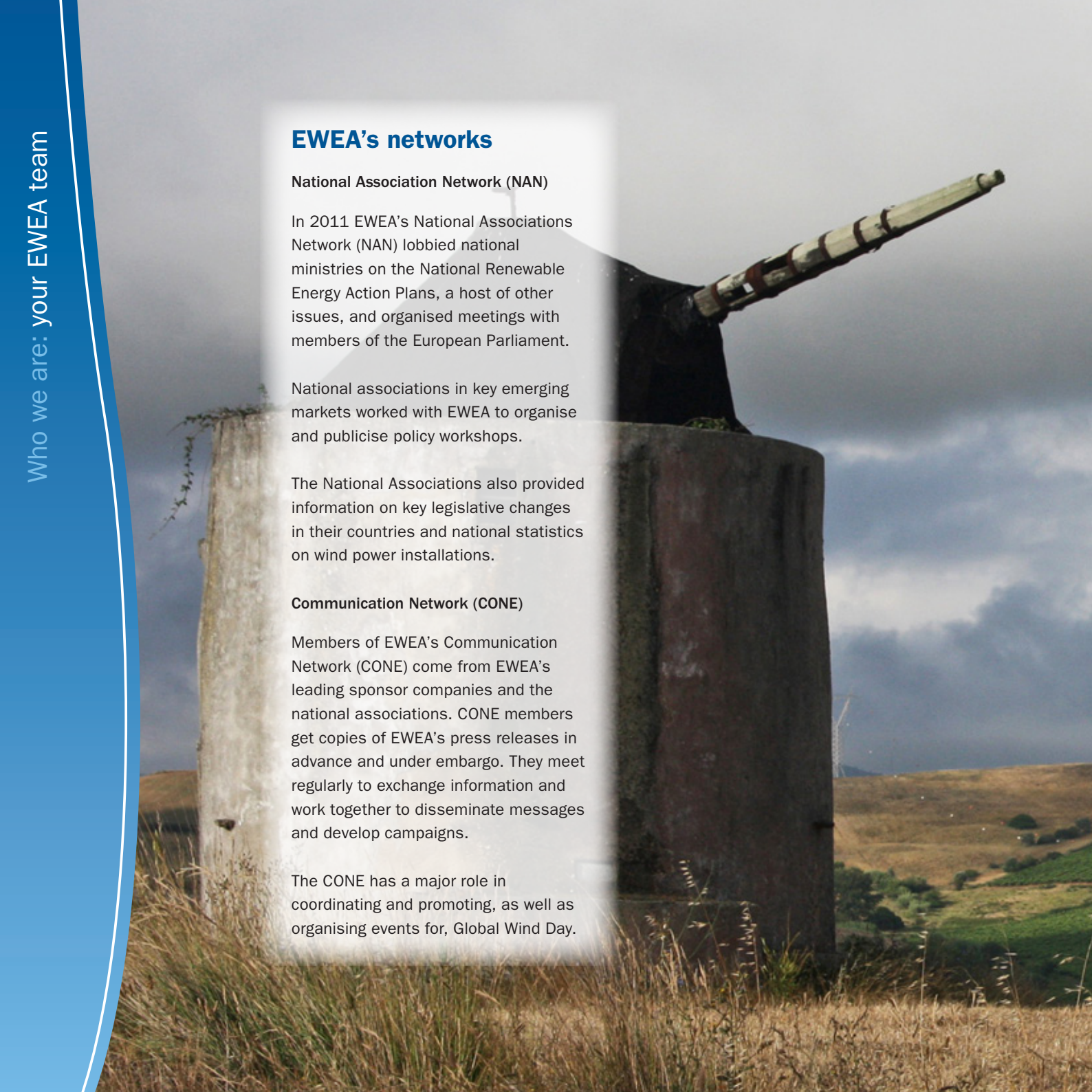
EERA Design Tools for Offshore Wind Farm Clusters

The project aims to develop a tool to help design groups of offshore wind farms.

Running time: 1 January 2012 to 30 June 2015

More information: www.eera-dtoc.eu

Supported by SEVENTH FRAMEWORK PROGRAMME



EWEA's networks

National Association Network (NAN)

In 2011 EWEA's National Associations Network (NAN) lobbied national ministries on the National Renewable Energy Action Plans, a host of other issues, and organised meetings with members of the European Parliament.

National associations in key emerging markets worked with EWEA to organise and publicise policy workshops.

The National Associations also provided information on key legislative changes in their countries and national statistics on wind power installations.

Communication Network (CONE)

Members of EWEA's Communication Network (CONE) come from EWEA's leading sponsor companies and the national associations. CONE members get copies of EWEA's press releases in advance and under embargo. They meet regularly to exchange information and work together to disseminate messages and develop campaigns.

The CONE has a major role in coordinating and promoting, as well as organising events for, Global Wind Day.

EWEA working groups

EWEA has three working groups which meet on a regular basis, and a task force.

- **Grid code working group:** This group works towards the best possible harmonisation of grid codes for wind power plants in Europe.
- **Large-scale integration working group:** This group identifies and implements actions to make progress on network and electricity market improvements for wind power.
- **Offshore working group:** This group works to achieve industry consensus on the likely future path for offshore wind energy in Europe.
- **Health and safety task force:** The aim is to develop and maintain a standard for basic safety training for construction and operation of wind farms on- and offshore. The Task Force is restricted to EWEA members.

More on their work in 2011 can be found in the different chapters of this report.

Construction of the Vindeby offshore wind farm, Denmark, October 2000
Photo: Wind Power Monthly/Finn Joergensen

Who we are

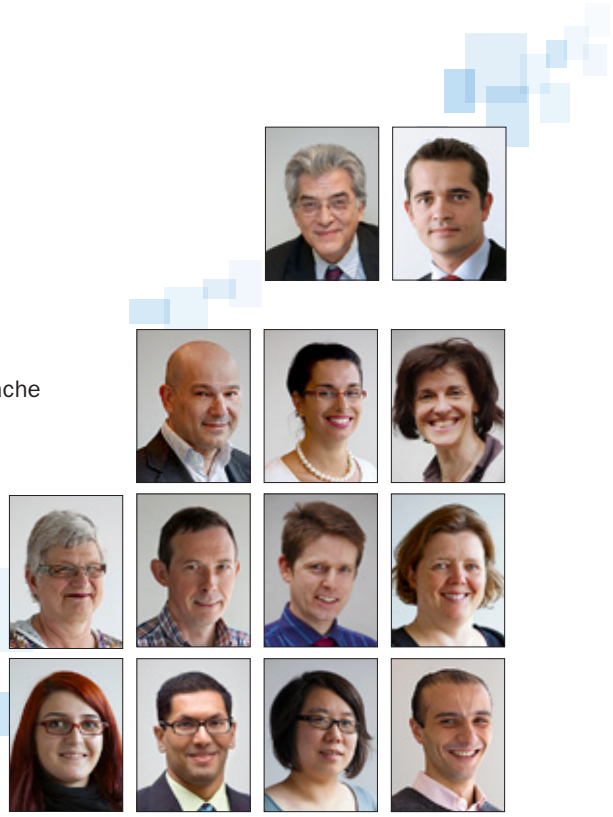
- **your EWEA team**
- **the EWEA Board of Directors**

- Finance and Administration Department
- Policy Department
- Communication Department
- Membership and Events Department
- The EWEA Board of Directors
- Supervisory Board

Who we are
Organisation and structure

Your EWEA team

The EWEA team is made up of 60 people. Activities at EWEA are managed through four departments: Policy; Communications; Membership and Events, and Finance and Administration.



- PRESIDENT: Arthouros Zervos
- CHIEF EXECUTIVE OFFICER: Christian Kjaer

Finance and Administration

- FINANCE AND ADMINISTRATION DIRECTOR: Maurice Menache
- PA TO CEO: Elona Wenk
- HEAD OF HUMAN RESOURCES: Nathalie Cnops
- OFFICE & PAYROLL ADMINISTRATOR: Lucienne De Borger
- IT MANAGER: Peter Deroost
- FINANCE MANAGER: Benoît Duchatel
- FINANCIAL CONTROLLER: Christine Pauwels
- CREDIT CONTROLLER: Carmen Georgiana Cristea
- BOOKKEEPER : Thomas Tharakan
- JUNIOR ACCOUNTANT: Pei Wu
- RECEPTIONIST: Karim El Idrissi

Email: ewea@ewea.org

Policy Department

- POLICY DIRECTOR: Justin Wilkes
- POLICY DEPARTMENT ASSISTANT: Emilie Debatty

Regulatory Affairs

- HEAD OF REGULATORY AFFAIRS: Stephane Bourgeois
- SENIOR REGULATORY AFFAIRS ADVISOR - CLIMATE CHANGE AND ENVIRONMENT: Rémi Gruet
- SENIOR REGULATORY AFFAIRS ADVISOR - GRIDS AND INTERNAL ELEC. MARKET: Paul Wilczek
- REGULATORY AFFAIRS ADVISOR - EU BUDGET AND RESEARCH: Vilma Radvilaitė
- REGULATORY AFFAIRS ADVISOR - MEMBER STATES & TRADE: Pierre Tardieu
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- REGULATORY AFFAIRS ADVISOR - EU AFFAIRS AND BUDGET: Maria Tvrdonova

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Analysis

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- RESEARCH OFFICER: Ivan Pineda
- RESEARCH OFFICER: Mihaela Dragan
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- PROJECT MANAGER: Filippo Gagliardi
- PROJECT MANAGER: Sharon Wokke
- PROJECT ASSISTANT: Manuela Conconi
- PROJECT ASSISTANT (INTERN): Lea Nina Orlovic

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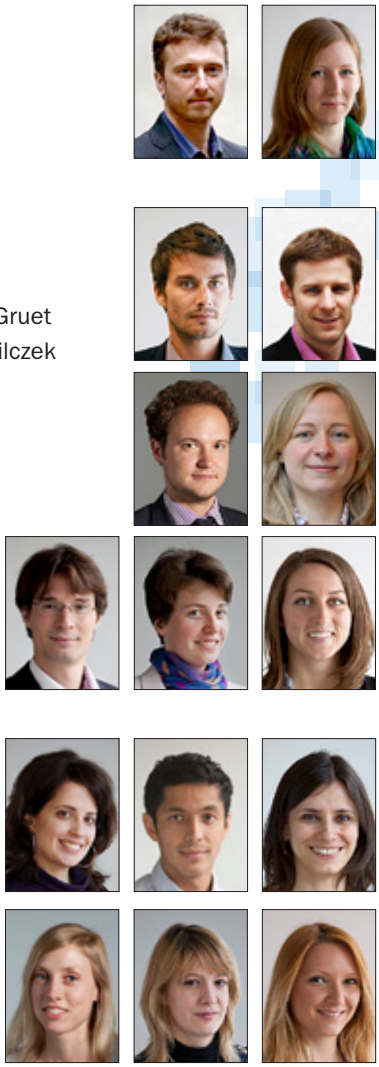

Communication Department

- COMMUNICATIONS DIRECTOR: Julian Scola
- COMMUNICATIONS ASSISTANT: Florian Becker

Communications Unit

- HEAD OF COMMUNICATIONS: Sarah Azau
- SENIOR COMMUNICATIONS OFFICER: Zoë Casey
- CAMPAIGNS OFFICER: Elke Zander
- MEDIA OFFICER: Peter Sennekamp

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- WEB EDITOR: Tom Rowe

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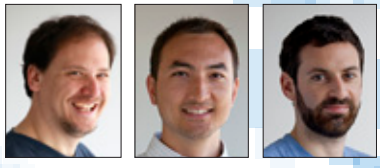

Membership & Events Department

- MEMBERSHIP & EVENTS DIRECTOR: Malgosia Bartosik
- ADMINISTRATIVE ASSISTANT: Maura Di Ruscio

Membership & Business Development

- HEAD OF MEMBERSHIP & BUSINESS DEVELOPMENT: Christelle Roche
- BUSINESS DEVELOPMENT MANAGER - MEMBERSHIP: Christi Newman
- SENIOR BUSINESS DEVELOPMENT MANAGER - EXHIBITION: Sanna Heinonen
- BUSINESS ANALYST - CRM SYSTEM: Maria Szumielewicz
- CRM ASSISTANT: Iwona Mertin
- BUSINESS DEVELOPMENT ASSISTANT - ADMINISTRATION: Iga Niewiadomska
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- MARKETING ASSISTANT: Cathy Vaessen

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- HEAD OF CONFERENCES: Amy Parsons
- SENIOR EVENT MANAGER - WORKSHOPS: Tim Robinson
- SENIOR EVENT MANAGER - LOGISTICS: Celia Galeotti
- EVENT MANAGER - CONFERENCES: John McSweeney
- EVENT MANAGER - CONFERENCES: Louise Lilja
- EVENT MANAGER - LOGISTICS: Frédérique Lefebvre
- EVENT ASSISTANT - EXHIBITION: Aleksandra Nowak

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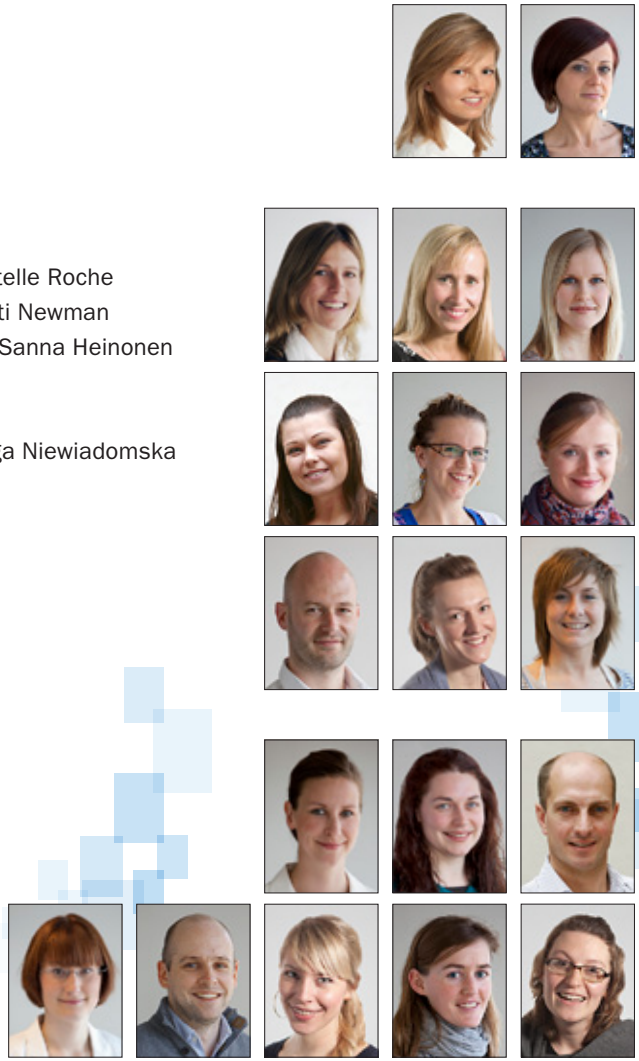

The EWEA Board of Directors

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 2012 there were 49 Board members representing the different membership categories. The Board elects and appoints seven members who, together with the Chief Executive Officer, make up the EWEA Supervisory Board. The Board of Directors appoints a President, two Vice Presidents, a Treasurer, a Secretary and two members.

Supervisory Board

- PRESIDENT: Prof Arthouros Zervos, *National Technical University of Athens*
- VICE PRESIDENT: Dr Klaus Rave, *Fördergesellschaft Windenergie*
- VICE PRESIDENT: Mr Peter Brun, *Vestas Wind Systems*
- TREASURER: Vacant – to be elected in June 2012
- SECRETARY: Dr Eddie O'Connor, *Mainstream Renewable Power*
- MEMBER: Mr Thorsten Herdan, *VDMA, German Engineering Federation*
- MEMBER: Vacant – to be elected in June 2012
- Mr Christian Kjaer, *Chief Executive Officer, European Wind Energy Association*

Board of Directors

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

Corporate members of the Board

- Acciona Energia *(Spain)*
- DONG Energy *(Denmark)*
- E.ON Climate & Renewables *(Germany)*
- EDP Renovables *(Spain)*
- EnBW Erneubare Energien GmbH *(Germany)*
- ENEL Green Power *(Italy)*
- ENERCON GmbH *(Germany)*
- ERG SPA *(Italy)*
- Doosan *(United Kingdom)*
- GE Energy *(UK)*
- Iberdrola Renovables *(Spain)*
- Mainstream Renewable Power *(Ireland)*
- PPC Renewables *(Greece)*
- Renewable Energy Systems *(UK)*
- SIEMENS Wind Power *(Denmark)*
- SSE Renewables *(Ireland)*
- Vattenfall Vindkraft *(Sweden)*
- Vestas Wind Systems *(Denmark)*

Associations

- Agoria *(Belgium)*
- ANEV - Italian Wind Energy Association *(Italy)*
- APPA - Spanish Renewable Energy Producers *(Spain)*
- AEE - Spanish Wind Energy Association *(Spain)*
- BWE - German Wind Energy Association *(Germany)*
- Danish Wind Turbine Owners Association *(Denmark)*
- DWIA - Danish Wind Industry Association *(Denmark)*
- FEE - France Energie Eolienne *(France)*
- IG Windkraft - Austrian Wind Energy Association *(Austria)*
- IWEA - Irish Wind Energy Association *(Ireland)*
- RenewableUK *(UK)*
- Svensk Vindenergi-Swedish Wind Energy Association *(Sweden)*
- VDMA – German Engineering Federation *(Germany)*

Other Board members

- ABB *(Denmark)*
- 3E *(Belgium)*
- Alstom *(Spain)*
- Ballast Nedam Offshore Energy *(Netherlands)*
- Dexia Crédit Local *(France)*
- ECN - Energy Research Centre for the Netherlands *(Netherlands)*
- EDF Energies Nouvelles *(France)*
- FGW Fördergesellschaft Windenergie *(Germany)*
- ForWind - University of Oldenburg *(Germany)*
- Garrad Hassan & Partners *(UK)*
- ZF Wind Power Antwerpen *(Belgium)*
- National Technical University Athens *(Greece)*
- Nordex AG *(Germany)*
- NWEA - Netherlands Wind Energy Association *(Netherlands)*
- REpower Systems *(Germany)*
- Risø DTU *(Denmark)*
- RWE Innogy *(Germany)*
- Vergnet *(France)*

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PRINT www.artoos.be

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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 700 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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