

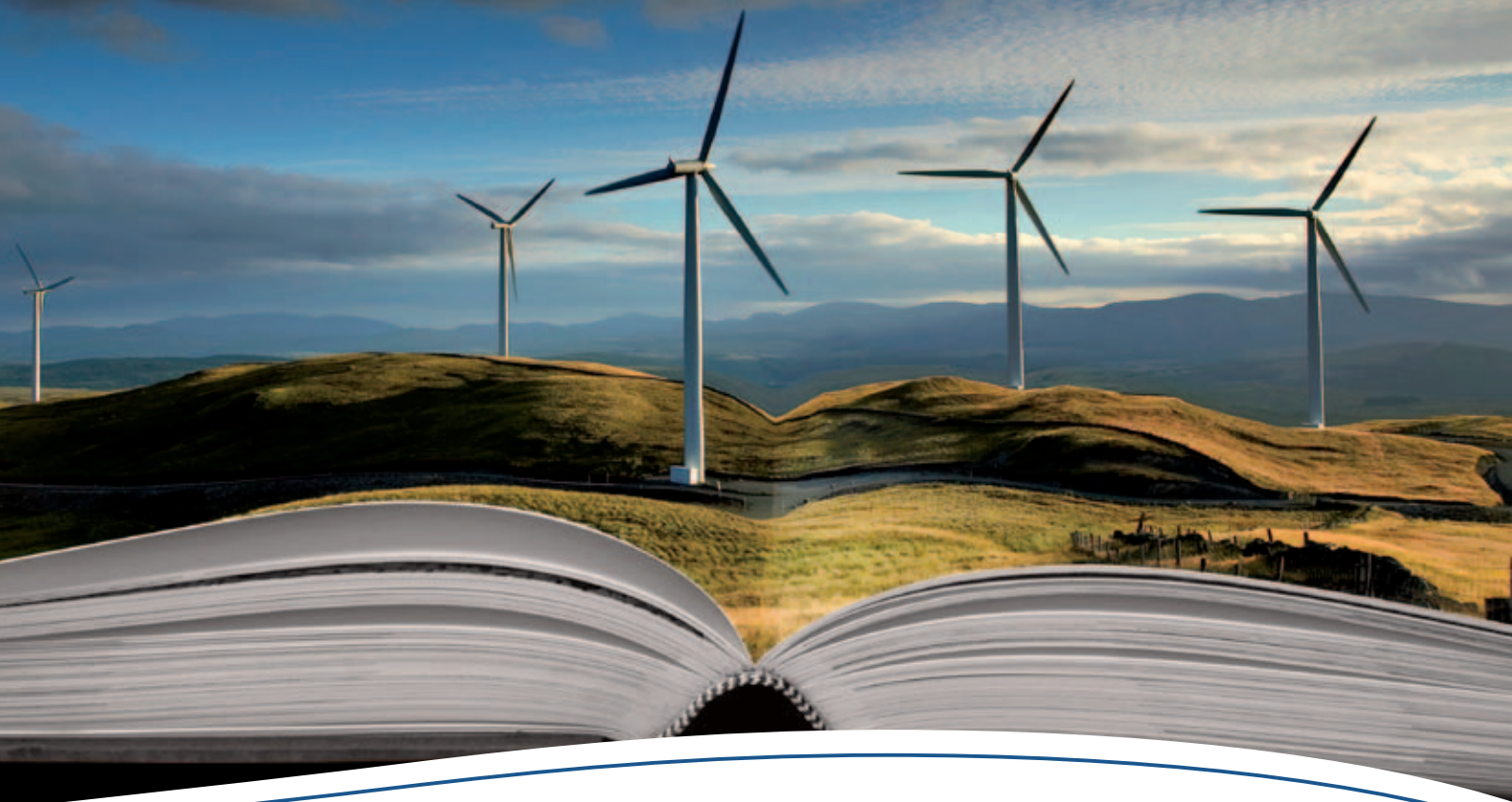


Powering the energy debate

The European Wind Energy Association

Annual Report 2010

Can you read the future?



You can now

As the voice of the wind industry, EWEA is in the perfect position to provide readers with reliable, relevant information on the developments and challenges encountered by the sector. If you are looking for reference publications for the wind energy sector, EWEA can offer you, free of charge, its collection of titles: available both in hard copy and digital versions.

Order here: www.ewea.org/order



EWEA

THE EUROPEAN WIND ENERGY ASSOCIATION

Powering the energy debate

The European Wind Energy Association

Annual Report 2010



W
A BREATH

I
OF

N
FRESH



EWEA

WWW.

EW



Foreword		
keeping the momentum		6
Wind energy		
the key facts		8
What we want		
EWEA's goals		11
What we do		
acting on policy		15
What we do		
uniting the wind industry		31
What we do		
producing new research		37
Who we are		
• your EWEA team		41
• the EWEA Board of Directors		
2010		
the highlights		50

Foreword

keeping the momentum

2010 was a year of many highs and some lows. One of the highs was the fact that the Member States' National Renewable Energy Action Plans showed the EU to be en route to slightly exceed the 20% renewable energy target.

Similarly, the European Commission's important communications on a 2020 strategy and on infrastructure priorities were steps towards a Europe-wide power grid and a functioning single electricity market.

EWEA reached out to a wider audience in 2010 through its 'Breath of Fresh Air' campaign. It communicated the benefits of wind energy through a visible presence in Brussels and beyond, including the display of a turbine blade and a photo exhibition in the EU quarter, as well as the array of events organised worldwide for Global Wind Day.

EWEA organised a host of policy workshops and campaign debates, covering topics from green jobs, to the barriers to wind energy in emerging European markets. Two major events were the European Wind Energy Conference 2010 – which went ahead successfully despite the disruptions, or eruptions, caused by a volcano – and GRIDS 2010, which focused on the power network.

We were also involved in several EU-funded projects, published a range of new reports, launched a blog on www.ewea.org/blog, and took forward our press and social media work, as well as our magazine *Wind Directions*. We significantly increased services to members with new online tools, more in-depth monthly newsletters and new business opportunities.

However, a low last year was the slowdown in annual wind energy installations, which shrank by 11% compared to 2009. The figures showed that financing cannot be taken for granted.

In order to improve financing conditions and maintain investor stability, EWEA is calling on EU leaders to put in place a stable legislative framework for after 2020. The centrepin of this should be a renewable energy target for 2030, to keep the momentum of the sector in the years to come.

We also need to continue pressing the EU for continued work towards a single energy market in Europe. To get there, we must keep working to develop and extend the grid, and put in place market rules. We need the EU to increase its support for wind energy research. Various legislative proposals will be made in 2011 which will clarify the way forward.

We worked hard for the wind energy industry in 2010, and significant progress was made. We will continue to work hard in 2011 so that the industry can continue to be a world leader, to provide jobs and economic growth, and to assure a supply of carbon-free, domestic power to Europe.



Arthouros Zervos
EWEA President



Key facts

wind power installed in Europe by end of 2010

	Installed 2009	End 2009	Installed 2010	End 2010
EU Capacity (MW)				
Austria	0	995	16	1,011
Belgium	149	563	350	911
Bulgaria	57	177	198	375
Cyprus	0	0	82	82
Czech Republic	44	192	23	215
Denmark	334	3,465	364	3,798
Estonia	64	142	7	149
Finland	4	147	52	197
France	1,088	4,574	1,086	5,660
Germany	1,917	25,777	1,493	27,214
Greece	102	1,087	123	1,208
Hungary	74	201	94	295
Ireland	233	1,310	118	1,428
Italy	1,114	4,849	948	5,797
Latvia	2	28	2	31
Lithuania	37	91	63	154
Luxembourg	0	35	7	42
Malta	0	0	0	0
Netherlands	39	2,215	32	2,245
Poland	180	725	382	1,107
Portugal	673	3,535	363	3,898
Romania	3	14	448	462
Slovakia	0	3	0	3
Slovenia	0.02	0,03	0	0,03
Spain	2,459	19,160	1,516	20,676
Sweden	512	1,560	604	2,163
United Kingdom	1,271	4,245	962	5,204
Total EU-27	10,499	75,103	9,332	84,324
Total EU-15	10,038	73,530	8,033	81,452
Total EU-12	461	1,574	1,298	2,872
Of which offshore and near shore	582	2,061	883	2,944

Note: Due to a difference in methodology, some figures in this table may differ from figures communicated by national wind energy associations

European Union: 84,324 MW
Candidate Countries: 1,418 MW
EFTA: 478 MW
Total Europe: 86,321 MW

	Installed 2009	End 2009	Installed 2010	End 2010
Candidate Countries (MW)				
Croatia	10	28	61	89
FYROM*	0	0	0	0
Turkey	343	801	528	1,329
Total	353	829	461	1,290
EFTA (MW)				
Iceland	0	0	0	0
Liechtenstein	0	0	0	0
Norway	2	431	9	441
Switzerland	4	18	25	42
Total	6	449	34	483
Other (MW)				
Faroe Islands	0	4	0	4
Ukraine	4	90	1	87
Russia	0	9	0	9
Total	4	99	1	101
Total Europe	10,845	76,471	9,918	86,279
Of which offshore and near shore	2	2	0	2

*FYROM = Former Yugoslav Republic of Macedonia
 Note: Due to previous-year adjustments, 127.8 MW of project de-commissioning, re-powering and rounding of figures, the total 2010 end-of-year cumulative capacity is not exactly equivalent to the sum of the 2009 end-of-year total plus the 2010 additions.





“*Wind power is leading the European transition towards a power system entirely run on renewable energy sources four decades from now.*”

CHRISTIAN KJAER - Chief Executive Officer



What we want

EWEA's goals

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

EWEA's strategy was updated in February 2009 because of the Renewable Energy Directive, which means wind has legislative support up to 2020 and sets binding renewable 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 and National Renewable Energy Action Plans are properly implemented in the Member States.

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 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 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 investment 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 CO₂ 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.





“ In 2010 we made real progress in many key areas; now we are working for effective implementation of the Renewable Energy Directive and for strong post-2020 EU legislation on renewable energy to maintain the sector’s momentum. ”

JUSTIN WILKES - Policy Director

ENERGY

Promoting a stable EU political framework

Implementing the Renewable Energy Directive

The EU's 2009 Renewable Energy Directive (2009/28/EC) sets 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.

By the end of 2010, all 27 Member States had handed in their National Renewable Energy Action Plans – setting out the steps to their individual renewable energy targets in 2020.

EWEA had worked hard with national government officials and national wind energy associations to ensure that the plans would allow wind power to play its full role in meeting the EU's 20% renewable energy target for 2020.

Once the plans were handed in, EWEA published an analysis for its members which showed that overall, the EU would just exceed the target, with 20.7% of its energy from renewables. Thirteen Member States predicted they would meet their target and eight

Post-2020 regulatory framework

EWEA has now started calling for a regulatory framework for post-2020. This would contain three key elements:

- A binding renewable energy target for 2030, giving investors stability, and building the path to a 100% renewable energy sector – and a zero-carbon power sector – in 2050.
- An Emissions Performance Standard capping carbon emissions on new power plants from 2015. This could start at 350g/KWh, the level of a gas plant, and decrease over time to encourage progress in gas power technology.
- A 30% emissions reduction target for 2020, with interim targets also set for 2030 and 2040, in order to take the EU to its 80-95% economy-wide reduction commitment in 2050.

that they would exceed their target. Only six forecast they would not manage to reach their target through domestic action alone and only two that they would fail to meet the target.

In 2010, EWEA paid special attention to the emerging markets of Romania, Bulgaria, Hungary, Poland and Turkey, organising a series of policy workshops in all of those countries (except Poland where EWEA held its annual conference and exhibition) to support market development and to encourage government action to improve grid access and streamline administrative procedures.

2020 strategy

In March 2010, the European Commission published its 'Europe 2020 strategy for smart, sustainable and inclusive growth'. This contained commitments to complete the internal energy market, work towards a supergrid and single market, and implement the strategic energy technology (SET) plan.

Electricity, infrastructure, system operation and markets

European power market

The third Energy Market Liberalisation Package, adopted in June 2009, requires National Regulatory Authorities to facilitate the integration of renewables into the power grid, and transmission system operators (TSOs) to grant electricity from renewable sources priority dispatch, as per the 2009 Renewable Energy Directive.

European energy companies have the choice either of completely splitting transmission and management – the 'full unbundling' option, supported by EWEA – or of retaining their network assets, with network activities or day-to-day grid operation managed independently.



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 'Pure Power' report
on www.ewea.org.*

In 2010, EWEA focused much work on the development of the single energy market, supporting the decision-makers' aim of an integrated European market by 2015. In June, EWEA published with the EU electricity industry body EURELECTRIC a declaration calling for grid development to facilitate a single market.

In November, EWEA organised an event on power grids in Berlin – GRIDS 2010 – at which it launched a report and conference statement with TSO body ENTSO-E arguing that a fair, single market in electricity was essential to increasing Europe's power supply from wind energy.

During 2010, EWEA worked on a harmonised grid code for wind power through its Grid Code Working Group which, when implemented, will benefit wind turbine manufacturers, developers and operators.

Wind energy in 2020

- **230** GW installed capacity: **190** GW onshore and **40** GW offshore
- Meeting **15.7-16.5** % of EU electricity demand depending on total demand
- Annual installations of **24.8** GW: annual investments of € **26.6** billion
- **22.9** % of total electricity generating capacity in the EU
- Producing **581** TWh of electricity, equivalent to the consumption of **131** million average EU households
- Avoiding **341.6** Mt CO₂ annually
- Avoided fuel cost of € **23.9** billion (assuming IEA forecast: fuel cost equivalent to \$ **97.4**/bbl of oil)
- Avoiding € **8.5** billion of CO₂ cost annually (assuming €25/t CO₂).

Wind energy in 2030

- **400** GW installed capacity: **250** GW onshore and **150** GW offshore
- Meeting **28.5** % of EU electricity demand depending on total demand
- Annual installations of **23.7** GW; annual investments of € **25.3** billion
- **36** % of total electricity generating capacity in the EU
- Producing **1,554** TWh of electricity, equivalent to the consumption of **252** million average EU households
- Avoiding **646** Mt CO₂ annually
- Avoided fuel cost of € **51** billion (assuming IEA forecast: fuel cost equivalent to \$ **108.2**/bbl of oil)
- Avoiding € **26** billion of CO₂ cost annually (assuming €40/t CO₂)

EWEA and EU projects

EWEA is coordinating several EU-funded projects.

ORECCA (Offshore Renewable Energy Conversion platforms - Coordination Action) will define strategic investment opportunities and R&D priorities for a European offshore renewable energy policy.

www.orecca.eu



OffshoreGrid

OffshoreGrid is developing a scientific view of an offshore grid in Northern Europe along with a suitable regulatory framework.

Running time: May 2009 – October 2011

www.offshoregrid.eu



SEANERGY 2020

The project will recommend how to remove maritime spatial planning policy (MSP) obstacles to 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 grid development.

Running time: May 2010 - April 2012

www.seanergy2020.eu



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

www.twenties-project.eu



TOPWind

The “Technology Platform Operational Programme Wind” (TOPWind) follows on from the Windsec project and works with the European Wind Energy Technology Platform (TPWind) on wind energy research.

Running time: 1 February 2011 – 31 January 2014

www.windplatform.eu



Two EU projects are now successfully completed.



WINDBARRIERS measured the barriers to on- and offshore wind projects in Europe, looking at the costs and difficulty involved. WINDBARRIERS ran until November 2010.

www.windbarriers.eu



UpWind aimed 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 ran until February 2011.

www.upwind.eu



Infrastructure proposals

In January, the European Commission allocated over €903 million to electricity interconnection projects as part of its broader European Economic Recovery Plan. Nine projects received funding, including the vital France-Spain interconnection.

In October, at a conference jointly organised by the Belgium EU Presidency and EWEA, energy ministries and industry from North Seas countries agreed the importance of developing offshore electricity infrastructure. In December, ministers from those countries - Belgium, Denmark, France, Germany, Ireland, Luxembourg, the Netherlands, Norway, Sweden and the UK - signed a Memorandum of Understanding on the 'North Seas Countries' Offshore Grid Initiative'. This will provide a framework for regional cooperation to find common solutions to cross-country questions related to current and future grid infrastructure developments in the North Seas.

Launched in November, EWEA's report, 'Powering Europe', set out how the grid can integrate increasing amounts of wind energy. The report argues there are no major technical barriers – but there are major economic benefits - to integrating large amounts of fuel- and pollution-free wind energy into Europe's electricity grid. It identifies infrastructure and markets as the two key barriers to hugely increasing the amount of wind power in Europe's electricity supply.

National Association Network (NAN)

In 2010 the NAN, with EWEA's support, lobbied national ministries on the National Renewable Energy Action Plans and organised meetings with members of the European Parliament.

National associations in key emerging markets worked with EWEA on the organisation and publicity for policy workshops.

The NANs also provided national statistics on wind power installations.

ENTSO-E

In June, the EU transmission system operators (ENTSO-E) released their revised pilot Ten-Year Network Development Plan (TYNDP), modelling the future power network. EWEA saw this as a useful step towards a much-needed European electricity grid that interconnects national electricity systems, benefits consumers, and enables the integration of large amounts of wind energy. However EWEA pointed out that this only reflected the current plans of the TSOs and not the targets of the EU and its Member States, meaning the amount of wind energy foreseen was lower than EWEA's estimate. ENTSO-E will take the Member States' targets and plans to reach them into account for the final TYNDP, to be published in 2012.

ACER

EWEA is one of the stakeholders in the expert group on grid connection for the Agency for the Cooperation of Energy Regulators – ACER – formerly known as ERGEG (the European Regulators' Group for Electricity and Gas).

EWEA has taken part in all ACER consultations relevant to the European wind industry, calling for market rules and grid development towards a single power market by 2015.

Offshore wind

In 2010 offshore wind power experienced record growth in Europe. 308 new offshore wind turbines were installed in the EU – an increase of 51% in installed wind power capacity on the previous year.

In total, 883 Megawatts (MW) of new capacity, worth some €2.6 billion, were installed in 2010 in nine wind farms in five countries, making a total of 2,964 MW.

The installed offshore wind power capacity now supplies the equivalent of 2.9 million average EU households with electricity from a total of 1,136 offshore wind turbines. In a normal wind year they would produce 11.5 Terawatt hours (TWh) of electricity.

Maritime spatial planning

The SEANERGY 2020 project was launched in 2010. Its aim is to recommend how to remove maritime spatial planning policy (MSP) obstacles to offshore renewable power generation.

Offshore Wind Industry Advisory Group

EWEA's Offshore Wind Industry Advisory Group (OWIG) worked to develop the industry's position on specific bottlenecks in offshore development. Dedicated groups or "task forces" examined issues that can impact the offshore industry's development, like cable connections, the supply chain, project financing and health and safety.

Wind energy research

In June, the Spanish EU Presidency launched the 'European Wind Initiative' (EWI) – a €6 billion ten year research and development roadmap for the wind energy sector.

EWEA working groups

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

- Grid code working group
- Large-scale integration working group
- Offshore working group

More on their work in 2010 can be found in the different sections of this report.



The EWI is the result of several years of joint effort by the European wind energy sector, 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, and 50% in 2050;
- 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 the European Wind Energy Technology Platform (TPWind) – a network and R&D forum for researchers and wind stakeholders, whose chairman is Henning Kruse of Siemens and whose secretariat is run by EWEA.

Budget and financing

The EU's 7th Framework Programme for research was granted a 13.8% increase in funding for 2011, taking it to a total of €8.6 billion, the biggest amount ever committed to a framework programme. However, EWEA said the Commission needed to clearly indicate in the budget how much money would be allocated for the European Wind Initiative to ensure Europe reaches the 2020 renewables targets.

Climate change and environment

In May, following the European Commission's analysis of options to move beyond 20% greenhouse gas emission reductions, EWEA issued a briefing urging the European Council and Parliament to agree a 30% reduction target, to maintain Europe's technological and industrial leadership in renewable energy technologies. EWEA also held a public debate and issued a pamphlet on this issue.

EWEA continued to support the work of the Global Wind Energy Council (GWEC) on the international climate negotiations. In the spring, the European Council declared it would produce the €2.4 billion per year to help tackle climate change the EU promised at the Copenhagen climate summit.

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).

Overall, seven wind projects will be able to receive funding - six in the "Wind" project category and one in the "Grid" category. There will be two calls for proposals – the first of which was published towards the end of 2010 with a budget equivalent to 200 million allowances.

Environment

EWEA launched its online Environmental Impact Information Tool in 2010, available to members. This brings together all published literature on wind energy and the environment and allows users to search for relevant material.

Communicating wind

Our main tools

In 2010, EWEA continued communicating that wind power is a popular, mainstream energy technology and a key solution to the emerging energy and climate crisis.



We implemented 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

EWEA's members-only newsletter *Wind Watch* was relaunched with a fresh new look, and continues to provide a monthly e-news service to EWEA members with in-depth policy and industry content.

The electronic version of EWEA's magazine *Wind Directions* was launched and is now sent to EWEA's 27,000 contacts, substantially increasing readership. Online subscriptions went up significantly. The first ever readers' survey was run. In 2010 *Wind Directions* focused on 'The climate battle: Copenhagen and its aftermath', 'Where are the women in wind?', 'How wind energy went global', 'Small wind turbines and what they can do' and 'Unravelling the grid'.

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 48 press releases in 2010.

EWEA organised a press conference and press releases around EWEC 2010 in Warsaw, which got more than 230 mentions in the press, up from 100 in 2008.



Press work was also carried out around the 2009 statistics, the various policy workshops organised by EWEA, Global Wind Day, and the GRIDS 2010 event in Berlin.

In 2010 EWEA activities were covered by most leading newspapers, TV, Radio stations and news agencies. These included AFP, ANSA, ARD, BBC, Belga, Bloomberg, CCTV China, CNBC India, Corriere Della Sera, CNN, dpa, El Mundo, Frankfurter Allgemeine Zeitung, Frankfurter Rundschau, Handelsblatt, La Tribune, Le Figaro, Les Echos, New York Times, Reuters, The Guardian, Wall Street Journal, Westdeutsche Allgemeine Zeitung and Wirtschaftsblatt.

Coverage varied from five to 60 articles per day including online publications, making more than 2,500 published articles in 2010 worldwide.

Campaigns

EWEA's 'Breath of Fresh Air' campaign was launched at EWEC 2010 in Warsaw. There were dedicated web pages, visuals and slogan and a participatory action 'adopt a wind turbine' and a 'Tell a Friend' contest, so adopters could collect votes for their turbine and share their support for wind energy. Over 10,000 people participated in the action, with 3,727 wind turbines adopted and 8,604 votes cast.

For Global Wind Day on 15 June, a 29.5 metre long blade was put up for two weeks on Schuman roundabout, near the European Commission and Council. A press conference and an evening reception were also held. 220 Global Wind Day events were organised in 29 countries around the world.

The Hard Rain photo exhibition on climate change and wind energy as a solution was organised and ran for two weeks in September, on Place du Luxembourg in Brussels, by the EU Parliament.

In the course of the 'Breath of Fresh Air' campaign, two public debates were organised by EWEA in Brussels in 2010. The first one, dealing with green jobs attracted almost 50 people, while over 140 people came to the second one on moving to a 30% emissions reduction target.

Website

The EWEA website grew in popularity, with traffic peaking at nearly 13,000 visitors during the week of EWEC. In total, over 450,000 visitors came to the site in 2010 – nearly 25% more than in the previous year. A web clean-up in the summer helped streamline the website and remove out of date or extraneous information.

EWEA re-launched the webpages reserved for its members on www.ewea.org, making them easier to navigate and offering even more specialist information, such as the analysis of the Member States' National Renewable Energy Action Plans.

EWEA's blog on www.ewea.org/blog was successfully launched at EWEC, and gets between 1,500 and 2,000 visits a month.

Corporate ID

EWEA strengthened its corporate identity in 2010, 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.





“ At EWEA, our members come first. In response to member demand, we have expanded our events portfolio and now organise over 20 events all over Europe. ”

MALGOSIA BARTOSIK -
Membership and Events Director



What we do **uniting the wind industry**

- The EWEA Annual Event (formerly known as “EWEC”)
- GRIDS 2010
- Other events
- Joining in: membership of EWEA



The EWEA Annual Event (formerly known as “EWEC”)

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

In 2010, EWEA changed the name of the event from the ‘European Wind Energy Conference and Exhibition’ (EWEC) to the ‘EWEA Annual Event’ to strengthen its identity.

Prior to this, EWEC 2010 was held from 20 to 23 April 2010 in Warsaw. It was chaired by Xabier Viteri, Chief Executive Officer of Iberdrola Renewables.

Unfortunately, the eruption of the volcano in Iceland just a few days earlier meant many participants were stranded in their home countries. Despite this however, 3,000 participants made it to the event while some 1,400 watched the live video streaming set up in response to unexpected travel disruption.

Sessions covered finance, science, technology, grids, business, markets and the environment, and there were plenty of side events and social events. Keynote speakers included EU Energy Commissioner Günther Oettinger, who spoke at the conference dinner, and representatives of the Polish government.

The EWEA Annual Event 2011 was held in Brussels from 14 to 17 March, and EWEA 2012 will run from 16 to 19 April in Copenhagen: www.ewea.org/annual2012



GRIDS GRIDS 2010

On 23 and 24 November, EWEA organised a special topic event on electricity grids in Berlin, with keynote speakers from the German environment and economy ministries. This attracted over 620 participants and 35 exhibitors.

Other events

1,500 key stakeholders took part in the ten debates and workshops that EWEA organised during the year, including the conference on the North Seas Countries’ Offshore Grid Initiative (Ostend, Belgium) jointly organised by EWEA and the Belgian Presidency of the European Union, policy and project workshops in several different countries, the ‘Breath of Fresh Air’ campaign debates and the first ever EWEA webinar (on a new online tool looking at environmental impact assessment), which attracted 55 participants from 20 countries.

Joining in: membership of EWEA

What are the reasons to join EWEA?

Making the right connections:

- 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:

- 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:

- 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.

Improving 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.

Influencing policy:

- 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 2 213 18 07 or email: cne@ewea.org.



What we do: uniting the wind industry



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 2010, EWEA had over 700 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 benefit of its members and the industry.



“EWEA produces a wide range of publications in print and online including important new research and statistics. In 2010 these covered subjects from power prices to power grids.”

JULIAN SCOLA - Communication Director

CLEAR
ERING
ABLE E
CHANG
RGY C
POWER
NG CHA
POWER



What we do **producing** **new research**

- Reports
- Position papers



In 2010, EWEA published many pieces of new research, all of which are on www.ewea.org.

Reports

EWEA launched a series of policy and project reports in an improved format which reinforced EWEA's corporate identity:

- **Powering Europe - Wind energy and the electricity grid** (November 2010) on wind energy integration into the power grid. Launched at GRIDS 2010 event.
- **WindBarriers - Administrative and grid access barriers to wind power** (July 2010) on the obstacles to wind energy development in Europe.
- **The European Wind Initiative** (June 2010) on the EU's R&D programme for wind energy.
- **EWEA 2009 Annual Report** (April 2010) on EWEA's activities in 2009.
- **Wind Energy & Electricity Prices - Exploring the 'merit order effect'** (April 2010) on how wind energy can bring down power prices.
- **Wind Energy: Action Plan for the new European Commission and Parliament** (January 2010) on what EWEA is calling for at an EU political level.

Position papers

- EWEA response on the ERGEG consultation on the Pilot Framework Guidelines on Electricity Grid Connection
- EWEA response on the consultation on the ENTSO-E second annual Work Programme 2010-2011
- EWEA response to Public Consultation: Towards a New Energy Strategy for Europe 2011-2020
- EWEA response to the European Wind Integration Study
- EWEA Position on Greenhouse Gas Reductions
- EWEA Response on the CEER call for evidence on Generation Adequacy Treatment in Electricity
- EWEA response to the ENTSO-E consultation on the first draft of the Community-wide Ten-Year Electricity Network Development Plan
- EWEA response on the ERGEG Position Paper on Smart Grids
- EWEA response on the ERGEG consultation on the draft advice on the Community-wide Ten-year Electricity Network Development Plan
- EWEA response on the CEER Consultation on regulatory aspects of the integration of wind generation in European electricity markets
- EWEA response on the ERGEG Draft Strategy Paper: Role of the Regional Initiatives



WER HOUSE

Who we are

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

- Administration
- Policy Department
- Communication Department
- Membership and Events Department
- Executive Committee
- Board of Directors
- Corporate members of the Board
- Associations
- Other Board members

The EWEA team grew significantly in 2010 and is now made up of 55 people from 19 different countries.

Activities at EWEA are managed through four departments: Policy; Communications; Membership and Events, and Finance and Administration.

Administration

- PRESIDENT: Arthouros Zervos
- CHIEF EXECUTIVE OFFICER: Christian Kjaer
- FINANCE & ADMINISTRATION DIRECTOR: Maurice Menache
- OFFICE MANAGERR: Kristel Hendrickx
- ADMIN OFFICER INTERN: Cristina Rubio Botto
- PA TO CEO: Elona Wenk
- IT MANAGER: Simeon Holdship
- HUMAN RESOURCES MANAGER: Nathalie Cnops
- FINANCE MANAGER: Benoît Duchatel
- BOOKKEEPER: Thomas Tharakan
- FINANCE ASSISTANT: Marika Mazzei
- CREDIT CONTROL ASSISTANT: Dory Moutran
- RECEPTIONIST: Isabel Detalle

Email: ewea@ewea.org





Policy Department

- POLICY DIRECTOR: Justin Wilkes

Regulatory Affairs

- HEAD OF REGULATORY AFFAIRS: Stéphane Bourgeois
- SENIOR REGULATORY AFFAIRS ADVISOR: Rémi Gruet
- SENIOR REGULATORY AFFAIRS ADVISOR: Paul Wilczek
- REGULATORY AFFAIRS ADVISOR: Vilma Radivilaite

Policy Analysis

- HEAD OF POLICY ANALYSIS: Jacopo Moccia
- RESEARCH OFFICER: Athanasia Arapogianni
- RESEARCH OFFICER: Angeliki Koulouri
- PROJECT MANAGER: Filippo Gagliardi
- PROJECT MANAGER: Dorina Iuga
- PROJECT OFFICER: Sharon Wokke
- PROJECT ASSISTANT: Manuela Conconi
- ANALYSIS AND RESEARCH ASSISTANT: Mihaela Dragan
- ADMINISTRATIVE ASSISTANT: Laurence Blondeau

Email: policy@ewea.org

Communication Department

- COMMUNICATION DIRECTOR: Julian Scola

Press, publications and campaigns

- SENIOR COMMUNICATION OFFICER: Sarah Azau
- CAMPAIGNS OFFICER: Elke Zander
- COMMUNICATION OFFICER: Zoë Casey
- MEDIA OFFICER: Peter Sennekamp
- WEB EDITOR: Tom Rowe
- COMMUNICATION ASSISTANT: Florian Becker

Web and Design

- HEAD OF CREATIVE UNIT: Raffaella Bianchin
- CREATIVE MANAGER: Jesús Quesada
- WEB MANAGER: Jason Bickley

Email: communication@ewea.org

Membership and Events Department

- MEMBERSHIP AND EVENTS DIRECTOR: Malgosia Bartosik

Events and Event Logistics

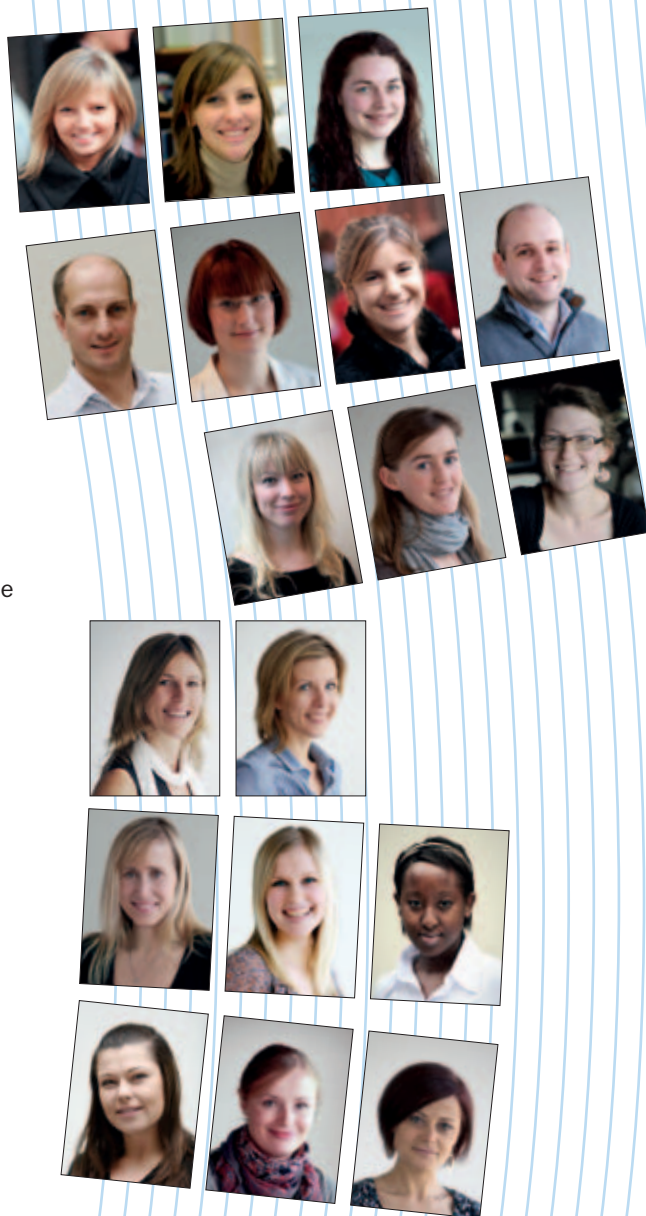
- HEAD OF EVENTS: Anja Wimmer
- SENIOR EVENT MANAGER: Amy Parsons
- SENIOR EVENT MANAGER: Tim Robinson
- SENIOR EVENT MANAGER: Célia Galeotti
- EVENT MANAGER: Luisa Coll
- EVENT ASSISTANT: John McSweeney
- EVENT ASSISTANT: Louise Lilja
- EVENT ASSISTANT: Frédérique Lefebvre
- EVENT ASSISTANT: Aleksandra Nowak

Email: events@ewea.org

Membership and Sales

- HEAD OF MEMBERSHIP AND BUSINESS DEVELOPMENT: Christelle Roche
- SENIOR MARKETING MANAGER: Vassiliki Nikolodimou
- BUSINESS DEVELOPMENT MANAGER: Christi Newman
- BUSINESS DEVELOPMENT MANAGER: Sanna Heinonen
- MARKETING ASSISTANT: Ankiza Gakanu
- BUSINESS DEVELOPMENT ASSISTANT: Maria Szumielewicz
- BUSINESS DEVELOPMENT ASSISTANT: Iga Niewiadomska
- ADMINISTRATIVE ASSISTANT: Maura Di Ruscio

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





EWEA



GLOBAL WIND DAY 2010



Give Europe a breath of fresh air

Sponsored by



Enel FRESH AIR

www.ewe.org/youair

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 2011 there were 48 Board members representing the different membership categories.

The Board elects and appoints five members who, together with the Chief Executive Officer, make up the EWEA Executive Committee.

The Board appoints a President, two Vice Presidents, a Treasurer and a 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: Ms. Maria Salvadores Sicilia, *Iberdrola Renovables*
- SECRETARY: Dr Eddie O'Connor, *Mainstream Renewable Power*
- CHIEF EXECUTIVE OFFICER: Mr Christian Kjaer, *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*)
- Gamesa (*Spain*)
- 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*)
- Renewable UK (*UK*)
- Svensk Vindenergi-Swedish Wind Energy Association (*Sweden*)
- VDMA – German Engineering Federation (*Germany*)

Other Board members

- ABB (*Denmark*)
- 3E (*Belgium*)
- Alstom Ecotècnia (*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*)
- Hansen Transmissions International (*Belgium*)
- National Technical University Athens (*Greece*)
- Nordex (*Germany*)
- NWEA - Netherlands Wind Energy Association (*Netherlands*)
- REpower Systems (*Germany*)
- Risø DTU (*Denmark*)
- RWE Innogy (*Germany*)
- Vergnet (*France*)

CREDITS

AUTHOR AND EDITING Sarah Azau, *European Wind Energy Association*

DESIGN COORDINATION Raffaella Bianchin, *European Wind Energy Association*

EWEA TEAM PHOTOGRAPHY Jason Bickley, *European Wind Energy Association*

DESIGN www.megaluna.be

PRINT www.artoos.be

EWEA has joined a climate-neutral printing programme. It makes choices as to what it prints and how, based on environmental criteria. The CO₂ emissions of the printing process are then calculated and compensated by green emission allowances purchased from a sustainable project.

PHOTOS Enercon, energypicturesonline, Eon, EWEA, Helen Hall, Inmagine, iStock, Gamesa, GWEC, Jason Bickley (EWEA)

Published in June 2011

2010 the highlights

- January**
- Germany's Günther Oettinger became EU Energy Commissioner. Denmark's Connie Hedegaard became Climate Action Commissioner.
 - EWEA released its 2009 offshore wind statistics: 54% more capacity had been installed than in 2008, reaching 2,056 MW.
- February**
- EWEA released its overall 2009 statistics: more wind energy capacity was installed than any other power-generating technology in the EU, reaching 74,767 MW.
 - EWEA's analysis of the National Renewable Energy Action Plans showed the EU should slightly exceed the 20% target by 2020.
- March**
- The European Commission published its '2020 strategy', committing to complete the internal energy market, upgrade the grid and implement the SET-Plan.
 - The Commission allocated over €903 million to electricity interconnection projects within the European Economic Recovery Plan.
 - EWEA welcomed both steps.
- April**
- EREC published a 100% renewable energy vision for the EU in 2050, supported by EWEA.
 - EWEC took place in Warsaw. The industry declared wind energy would meet 50% of EU electricity demand in 2050. EWEA published 'Wind Energy and Electricity Prices', showing wind can reduce power prices. The 'Breath of Fresh Air' campaign and EWEA's blog were launched.

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.

June → Launch of the €6 billion European Wind Initiative – an R&D roadmap.
→ EWEA and EURELECTRIC launched a declaration calling for “a truly European approach to grid planning”.
EWEA’s first public debate on green jobs took place.
→ 15 June was Global Wind Day. EWEA put up a 29.5 metre turbine blade in Brussels. Events took place worldwide.
→ ENTSO-E published its revised pilot Ten-Year Network Development Plan. This acknowledged the urgency of “large grid investments” but did not take into account the national renewables targets.

July → EWEA statistics showed 118 new offshore wind turbines - 333 MW of capacity - were grid-connected in the first half of the year.

September → EWEA organised a photo exhibition in Brussels, showing the devastation of climate change and wind energy as part of a solution.
→ A European Commission forecast expected wind to make up 41% of power capacity installations from 2011 to 2020. EWEA welcomed this, but found the predicted drop in wind installations after 2020 unrealistic.





October

- EWEA organised a conference with the Belgian Presidency, at which Energy Ministers agreed the importance of developing offshore electricity infrastructure.
- EWEA's public debate on a 30% emission reduction target took place with Commissioner Hedegaard.

November

- The European Commission published: 'Energy infrastructure priorities for 2020 and beyond'. EWEA welcomed this but stressed the need for ambitious legislative proposals.
- EWEA's GRIDS 2010 event was held. EWEA released a joint statement with ENTSO-E and others stressing the urgency of grid investments.
- EWEA published 'Powering Europe', arguing there are no major technical barriers – but major economic benefits - to integrating lots of wind energy into Europe's grid.

December

- North Seas countries ministers agreed to develop an offshore electricity grid and remove barriers to electricity trade. This was welcomed as a major step forwards by EWEA.






Discover five reasons to join EWEA



For further information visit
www.ewea.org/membership

EWEA is the voice of the wind industry, actively promoting the utilisation of wind power in Europe and worldwide

Did you know? As an EWEA member you receive 5 key benefits:

-  Access to the largest network of wind industry professionals
-  Key information about the wind sector
-  Significant discounts on exhibition stands, delegate fees and advertising
-  Improved visibility and usage of Member of EWEA logo
-  Representation at the highest level



EWEA

THE EUROPEAN WIND ENERGY ASSOCIATION



www.ewea.org

PRINTED BY ARTOOS

- ☑ ISO 14001
- ☑ 100% GREEN POWER
- ☑ CLIMATE NEUTRAL COMPANY
- ☑ SUSTAINABLE DEVELOPMENT

PRINTED CLIMATE NEUTRALLY

certificate number: 539-53520-0511-1251
www.artoos.be



RECYCLED
Paper made from
recycled material
FSC® C007370

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.

Tel: +32 2 213 18 11 - Fax: +32 2 213 18 90

E-mail: ewea@ewea.org