

Working with GWEC to develop the Global Renewables Market



ABOUT GWEC

- GWEC is the **voice for the global wind energy industry**
- Its membership is made up of **the leaders in the international wind sector** including developers, equipment suppliers, service providers, and more.
- It brings together all the **leading wind energy associations** around the world from Asia, to Africa, to Europe and Latin America.
- It is **the most active lobbying body for the sector** and plays a leading role in opening and developing new markets for the wind industry to accelerate the global energy transition.
- It has high level relationships with the **leading global institutions which influence policy for the wind industry such as** IRENA, IEA, UNFCCC, World Bank/IFC, and collaborates with adjacent technologies such as solar PV and storage



JOIN THE GLOBAL COMMUNITY!

CO Members



Associations



JOIN THE GLOBAL COMMUNITY!

C1, C2, and C3 Members



JOIN THE GLOBAL COMMUNITY!

C1, C2, and C3 Members



GWEC'S MISSION

1

To act as an **authoritative voice** for the **global industry**, speaking out on policy issues that affect the industry, fostering best practices and technology innovation and ensuring fair market access and fair treatment for its members across global markets.

2

To **develop new markets** for the wind industry and accelerate the global growth of the sector. GWEC has a successful track record in places like China, India, Brazil, South Africa, Mexico, Argentina and Colombia. We are currently helping to develop crucial emerging markets such as Vietnam and the Philippines, while working to accelerate growth in others such as India and Mexico and enable the expansion of Offshore Wind into global markets.

GWEC's 3 TIER APPROACH

1

Engage with **governments** and **regulatory bodies** to create fit for purpose regulatory frameworks.

2

Create or strengthen **local wind or renewable energies associations**.

3

Build dynamic **business environments** for the industry by bringing together key stakeholders.

GWEC'S CORE ACTIVITIES



Intelligence

Market intelligence, policy analysis, technical expertise



Summits & Conferences

Creating business environments to discuss challenges, find solutions and network



Advocacy & Policy

Communicating the benefits of wind power and working on regulatory frameworks



Business Matching

Connecting members to the right people to grow your business



Collaboration

Sharing best practices and connecting stakeholders



Capacity-Building

Establishing strong wind energy associations in emerging wind markets, transferring knowledge to stakeholders

WHY BECOME A MEMBER?

- Being part of GWEC's board will ensure that your company has a place at the table to **influence the future direction of the wind industry** and GWEC's strategic focus in opening new markets.
- Being part of GWEC will give you access to **an effective, independent lobby**, which can promote and protect the interests of the industry.
- Being part of GWEC will give you **access to policymakers** and other key stakeholders in the most relevant markets to create more business opportunities for your company.
- Being part of GWEC will give access to best in class **market intelligence** that is exclusive to GWEC Members and is an important resource for your company to make informed business decisions.
- Being part of GWEC will allow your company to **raise its profile and be seen as a thought leader and pioneer in the industry**, through networking and speaking opportunities at the most important events in the global wind industry's calendar.



MEMBERSHIP | BENEFITS

GLOBAL VISIBILITY

- ✓ Listing of your organisation on the GWEC website.
- ✓ Speaking slot in GWEC Events
- ✓ Discounts on GWEC event tickets and sponsorship

INFLUENCE & INTELLIGENCE

- ✓ Access to GWEC Task Forces
- ✓ Access to GWEC Market Intelligence
- ✓ Consultancy on doing business in emerging markets

NETWORK BUILDING

- ✓ B2B Matchmaking in emerging markets
- ✓ Invitation to exclusive events and workshops

MEMBERSHIP | CATEGORIES & FEES

CORPORATE

- C0** Corporations with an annual turnover in the wind energy sector exceeding €100 million.
1 automatic board seat.
Annual Fee: €43,200
- C1** Corporations with an annual turnover in the wind energy sector between €50 million and €100 million.
1 board seat for every 3 C1 Members.
Annual Fee: €14,400
- C2** Corporations with an annual turnover in the wind energy sector between €10 million and €50 million.
1 board seat for every 6 C2 Members.
Annual Fee: €7,200
- C3** Corporations with an annual turnover in the wind energy sector under €10 million.
Annual Fee: €1,440

ASSOCIATIONS

- AC1** Continental associations representing at least 75% of the existing national wind energy associations on that continent, and where the continent has at least 20,000MW of installed wind capacity.
3 automatic board seats.
Annual Fee: €10,800
- AC2** Continental associations representing at least 75% of the existing national wind energy associations on that continent, and where the continent has less than 20,000MW of installed wind capacity.
1 automatic board seat.
Annual Fee: €6,000
- A1** Associations and organisations active in the field of wind energy. The category includes National wind industry associations.
1 automatic board seat.
Annual Fee: €3,600

Task Forces

GWEC TASK FORCES | INTRODUCTION



Focus on South Africa and SADEC region



Focus on Brazil, Mexico, Chile, Argentina, Colombia



Focus on Vietnam, Philippines, Thailand, Indonesia



Focus on China, India, Taiwan, Japan, Korea, US, Vietnam



Focus on cost reduction, floating, market design (with JWPA)



Focus on accelerating growth of floating offshore dev.

GWEC TASK FORCES | ACTIVITIES

GWEC Task Force

Policy and
Regulation
Work in the
Region/Each
Market

Wind/RE
Association
Capacity
Building in
Different
Markets

High-level
comms work
on Wind
and RE,
driven by
top quality
research

Market events
endorsed by
and designed
for the
Industry

- Engage Wider Stakeholders in Shaping up the Energy Transition:
- System Approach to engage other RE and clean technology industries;
- Corporate PPA/RE Sourcing to engage companies/stakeholders outside energy sector.

- Driven by **leading companies and other actors** active in a region or sector defined as top priority
- Aim to accelerate growth of wind and/or renewables market and **un-block policy barriers**
- **Priority and strategy setting** with strong input by companies
- Work program defined by **close consultation with companies**

GWEC TASK FORCES | AFRICA

CHAIR



Jon Lezamiz
Africa Market
Development
Director,
Siemens Gamesa
Renewable Energy

MEMBERS



GWEC TASK FORCES | LATIN AMERICA

CHAIR



Ramón Fiestas
Chair, Latin
America
Committee, GWEC

MEMBERS



SIEMENS Gamesa
RENEWABLE ENERGY

Vestas



Ingeteam



NRG Systems



ARCVERA
RENEWABLES



MAINSTREAM
RENEWABLE
POWER

reno^oatio



PNE
pure new energy



GWEC TASK FORCES | SOUTH EAST ASIA

CHAIR



Mark Hutchinson
VP, Head of APAC
Power &
Renewables
Consulting, Wood
Mackenzie

MEMBERS



GWEC | INDIA

GWEC India has been established to **assist with the continued development of wind energy in India**, one of the world's largest markets a key geography for the Energy Transition as the country attempts to transition rapidly away from fossil fuel generation and in particular coal.

GWEC is working with a group of **leading wind energy manufacturers and generators** to assist India's government and other key stakeholders in order to **overcome the barriers** which India's wind industry is currently facing, around land allocation, federal and state coordination, transmission infrastructure, auction design and other issues.

GWEC India is also engaged around the **creation of a dynamic offshore wind sector in India**, having successfully carried out the landmark FOWIND study on the feasibility of the offshore wind in India.



GWEC TASK FORCES | GLOBAL OFFSHORE WIND

CHAIR



Alastair Dutton
Special Advisor &
Chair of Global
Offshore Wind Task
Force, GWEC

MEMBERS



GLOBAL OFFSHORE WIND | WORLD BANK GROUP COLLABORATION



GWEC organised the **UK Seminar and Study Tour** around RUK's Global Offshore Wind 2019 in London at the end of June. This consisted of a full week of conference, workshops, exhibition visit and time in North East England seeing factories, ports, a test centre and a training centre.

12 Countries **35** Delegates including WBG staff **6** Countries already requesting assistance

Many thanks to GWEC, the week couldn't have gone better!

-Sean Whittaker, IFC

NEXT MISSIONS



Vietnam
Fall 2020



South Africa
Fall 2020



Virtual Study Tour
15-17 September 2020



Brazil
July 2020



GWEC TASK FORCES | FLOATING OFFSHORE WIND

CHAIR

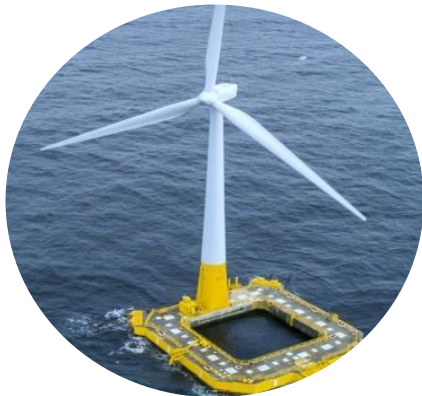


Henrik Stiesdal
Chair of the Floating Offshore
Wind Task Force



Maf Smith
Floating offshore wind expert
and former Deputy CEO of
RenewableUK

MEMBERS



GWEC TASK FORCES | OFFSHORE WIND JAPAN

CHAIR



Alastair Duffon
Special Advisor &
Chair of Global
Offshore Wind Task
Force, GWEC



Jin Kato
President at JWPA

MEMBERS

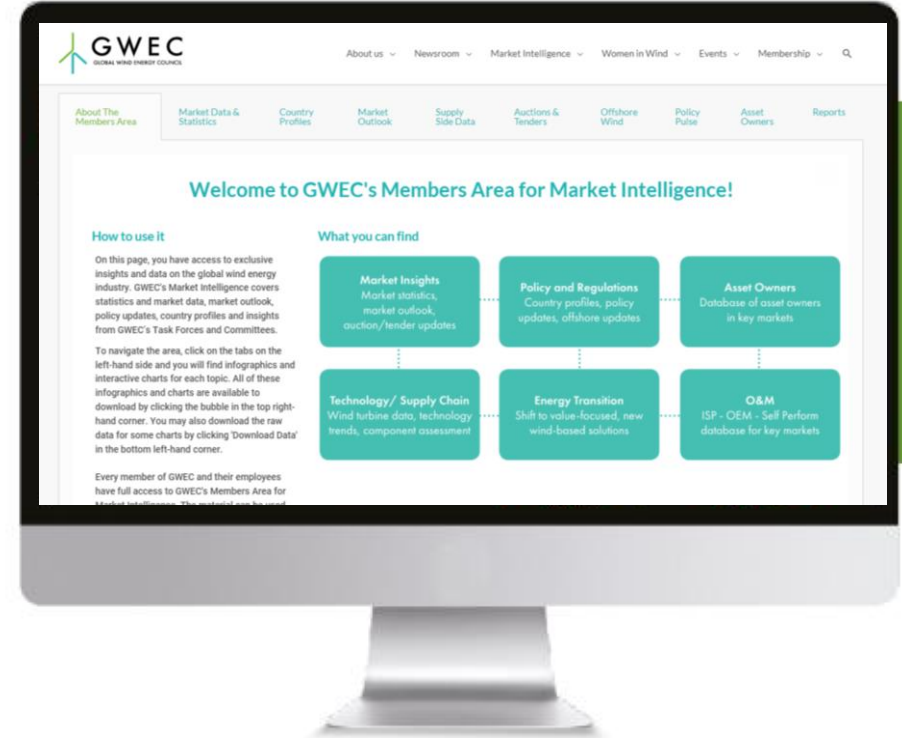


Market Intelligence

MARKET INTELLIGENCE | MEMBERS AREA

Exclusive access for GWEC Members to authoritative data and insights from wind energy experts such as:

- ✓ Market Insights and Forecasts
- ✓ Policy and Regulation Updates
- ✓ Comprehensive Supply Chain Data and Trends
- ✓ Exclusive Reports and Country Profiles
- ✓ Extensive Databases for Projects, Auctions, Asset Owners and Service Providers



MARKET INTELLIGENCE | PRODUCTS

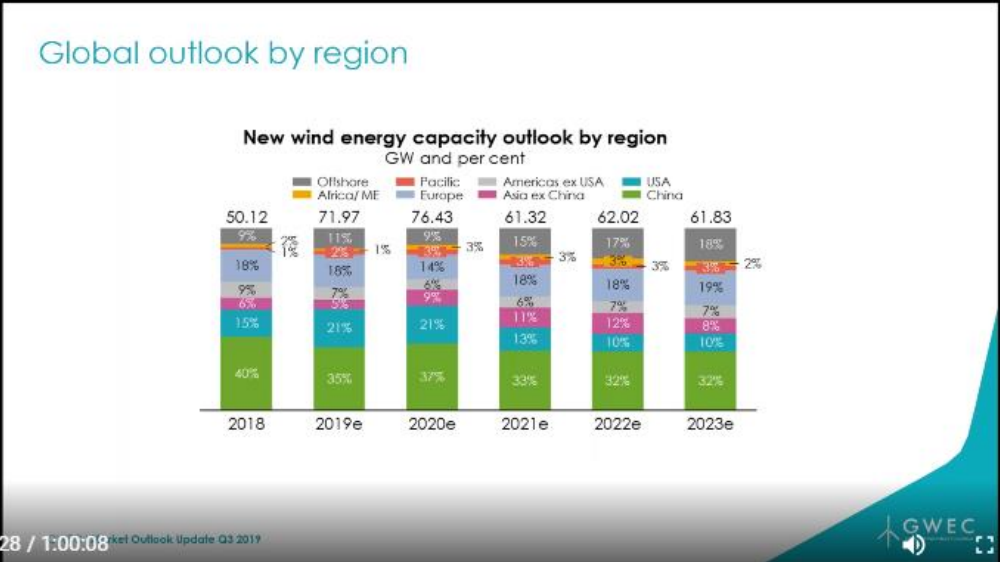
| Reports | Frequency |
|--|--------------------|
| 1. Wind Energy Stats/Market Data | |
| Wind stats 2019 (and historic) | Annual |
| Global Wind Report | Annual |
| Wind Energy Statistics (wind energy penetration rate, jobs) | Annual |
| 2. Country Profiles/Policy Updates | |
| Country Profiles Onshore/Country Profiles Offshore | Quarterly / Ad-hoc |
| Ad-hoc policy updates | Ad-hoc |
| 3. Market Outlook | |
| Global Wind Market Outlook for next five years (Q1 and Q3) | Semi-Annual |
| 4. Supply Side Data | |
| Global Wind Turbine Supply Side Data Report (by market, by technology, by turbine size and numbers) | Annual |
| 5. Auction/ Tenders | |
| Auction Trends and Learnings | Annual/Quarterly |
| Global Auction Results (database) | Annual/Quarterly |
| 6. Offshore Wind Market | |
| Global Offshore Wind Report | Annual /Quarterly |
| Market Entry Opportunity (database) | Annual /Quarterly |
| Global Offshore Project Pipeline (database, in-operation and under-construction) | Annual /Quarterly |
| Global Offshore Turbine Installation Vessel Database | Annual /Quarterly |
| 7. Components Assessment | |
| Gearbox (Q4 2019), Blade (2020), followed by other components | Special report |
| 8. Wind Asset Owners/ Operators | |
| Ranking of Wind Asset Owners and Operators Globally (Onshore & Offshore) | Annual |
| 9. O&M | |
| O&M service provider database (ISP - OEM - Self-perfrom) | Annual |
| 10. Energy transition, Digitalization, Hybrids | |
| Position papers/ studies - Value shift, Corporate PPAs | Special report |
| Government support to wind and other ("true cost of coal") | Special report |
| New Solutions, GWEC policy recommendations | Special report |

MARKET INTELLIGENCE | WEBCASTS

4.7K Registrants for our Webcasts over the past year.

1K Shares of our Webcast Recordings over the past year.

In September, we held our largest Webcast ever for the **Webcast on Wind: Updated Market Outlook.**



200

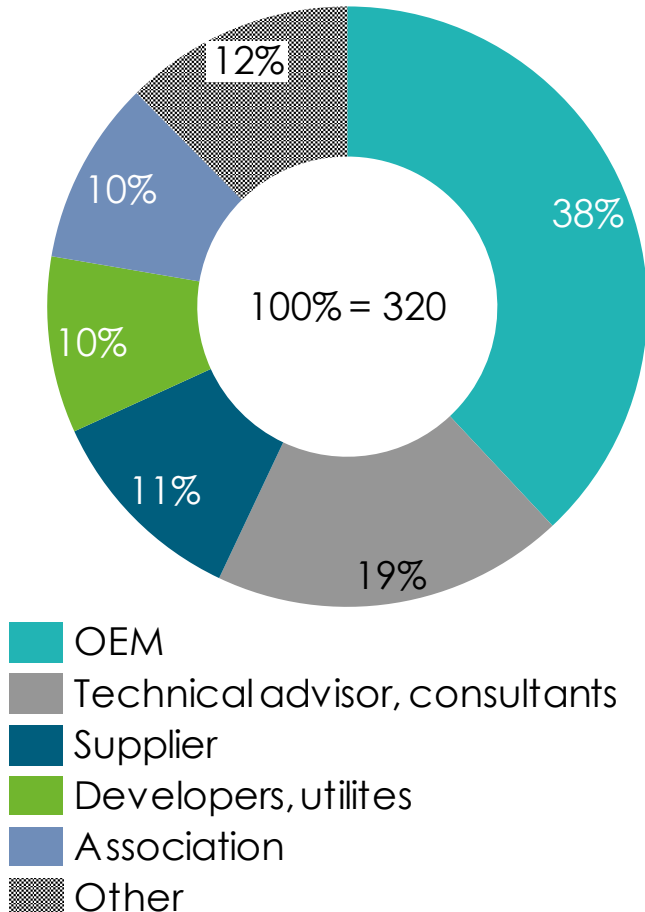
Participants joining from companies, private sector and public institutions

40

Different countries ranging from OEMs, to consultancies, to institutions like the World Bank and BOEM

MARKET INTELLIGENCE | IMPACT

MEMBERS AREA SUBSCRIBERS



72,584

Total views over the past 90 days for Market Intelligence products in the Members Area

1 of 5

Requests to access the Market Intelligence Platform are not GWEC members, creating new membership leads

7 of 10

Most visited pages on the GWEC website are related to Market Intelligence

+10,000

Unique downloads of the Global Wind Report

MARKET INTELLIGENCE | PARTNERSHIPS



GWEC co-chair's IRENA Business and Investor Group



GWEC works closely with IEA, plays active part in RIAB



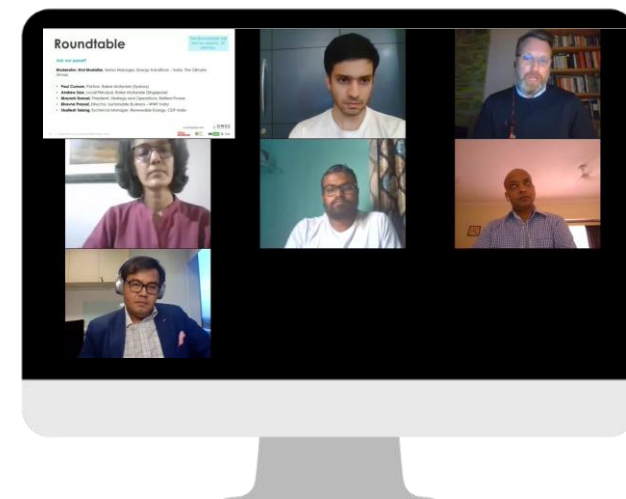
GWEC works closely with RE100-Climate Group & other international initiatives



GWEC works closely with World Bank-IFC and other leading development banks

GWEC and RE100 join forces to accelerate corporate sourcing of renewable electricity in emerging markets

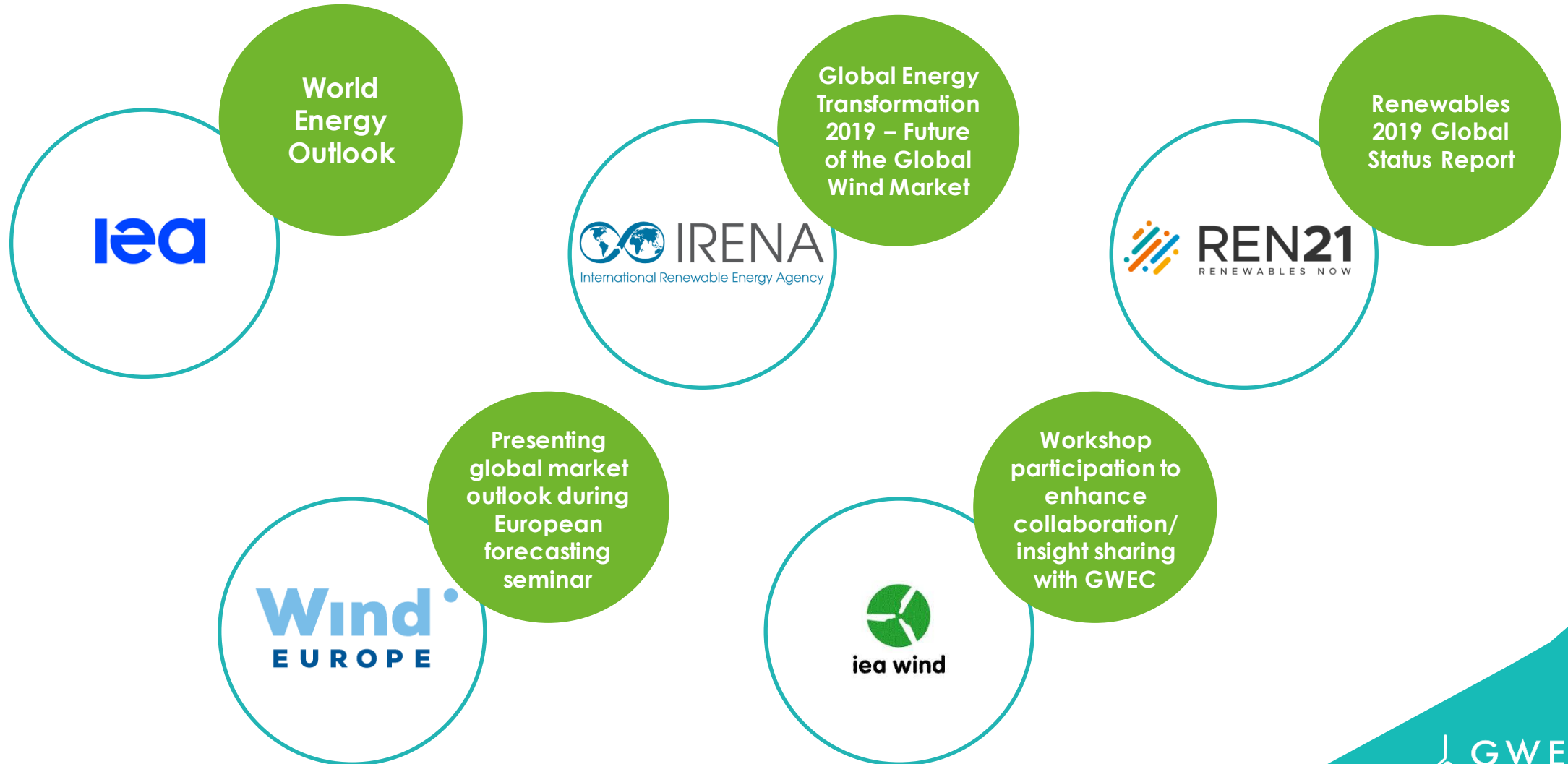
- ✓ GWEC and RE100 - an initiative led by The Climate Group in partnership with CDP - put together a **webcast series** on “**Corporates in the Global Energy Transition**” throughout 2020.
- ✓ This series examines how **corporate sourcing of renewable energy** in emerging wind/solar markets is transforming energy systems around the world.
- ✓ Following the webcast, there are opportunities for **free networking sessions**, bringing together corporate renewable energy buyers, sellers and advisers.
- ✓ The webcasts are conducted in partnership with **Baker McKenzie and Global Solar Council (GSC)** and focus on four high-impact markets or regions: **India, Taiwan, Japan and South East Asia/Australia**.



Screenshot from “Corporate Sourcing of Renewable Energy: India” (30 July 2020)

Next edition
will be held
soon!

MARKET INTELLIGENCE | CONTRIBUTIONS



Women in Wind Global Leadership Program



WOMEN IN WIND | 2019 MILESTONES



Global Visibility

Partnership with **IRENA** for joint report 'Wind Energy: A Gender Perspective'

Statement to the **UNFCCC** on gender mainstreaming

Official Action Partner for UN Global Week to **#ACT4SDGs**

Meet ups with global leaders during study tour including **Fatih Birol of IEA**



Storytelling Campaign

Opinion pieces and interviews in mainstream and trade media

+800 Tweets and **+500 Instagram followers** since launch

+50 posts on Women in Wind blog

Speaking opportunities at **8 events** on the topic of gender diversity



Programming Achievements

Launch of **8** mentorship tandems

5 knowledge transfer webinars

Week-long study tour in Berlin and London

WOMEN IN WIND | VISION FOR 2020

1 Increasing **scale of participation** to 15+ mentees

2 Expanding **corporate partnerships** and **profitability**

3 Promoting **sector-wide best practices** via industry charters, guiding documents for industry events, etc.

4 Strengthening **international institutional partnerships** (e.g. dialogues with World Bank Group's Energy2Equal program)

"From factory floor to boardroom, the global wind industry needs to develop all the talents to help us innovate and grow. The Women in Wind program is a great way for MHI Vestas to support this talent development."



Mary Thorogood, Senior Specialist, Strategy and Business, MHI Vestas
Mentor 2019/2020

WOMEN IN WIND | IMPACT

Individual Level

Personal development via mentorship tandems and opportunities for building skills in presentation, communications, branding and leadership.

Career development via webinars on industry topics, sector conferences and network-building.

Company Level

Promoting best practices in diversity and inclusion, with the aim of creating a “bandwagon” effect across the sector.

Demonstrating diversity of role models for female leadership in wind energy around the world.

International Level

Global visibility and a voice representing women in the wind sector.

Engagements with international institutions like IRENA and UNFCCC to demonstrate strong role of wind in fostering a gender-inclusive energy transition.

Sustainable Industry Initiative



THE MARKET DESIGN CHALLENGE

Renewables investments, installations are lagging behind Paris objectives



“...keeping a global temperature rise this century **well below 2 degrees Celsius** above pre-industrial levels and to pursue **efforts to limit the temperature increase even further to 1.5 degrees Celsius....**”

Objective
IPCC report foresees RES at over 90% of power generation by 2050

Fossil fuels still dominate

Status
Coal still biggest global power source (1/3 total), continued growth in most dynamic markets

Objective
\$5.3 trillion in wind and \$4.2 trillion in PV needed through 2050

Investments Decrease

Status
-5% (BNEF 2018)
Required INCREASE OF x5

THE MARKET DESIGN CHALLENGE

Competitive LCOE alone will not bring about Energy Transition at required pace

Broken permitting set-ups, land issues and Nimbyism slowing keying markets

“Race to the bottom” challenges profitability of projects and supply chain

Transmission bottlenecks and incumbents slow development

High share of RES results in negative wholesale prices

Still unequal playing field for RES compared to fossils

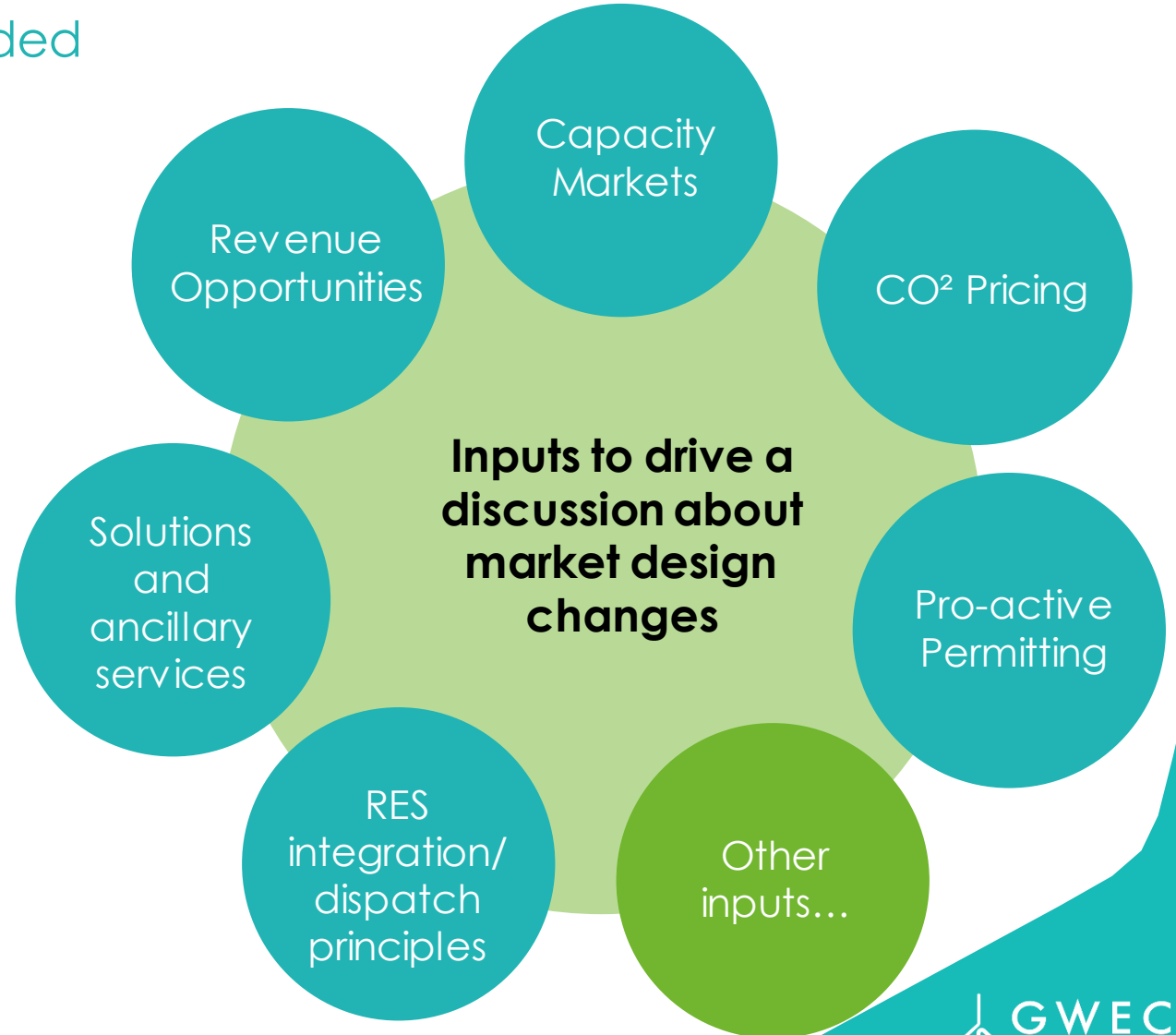
Through auction set-ups the **malfunctions of market design** surface.

Renewables are **kept in a niche market** separated from fossil fuels

THE MARKET DESIGN CHALLENGE

Proactive approach on regulation needed

- ✓ Create **sense of urgency** to accelerate energy transition
- ✓ Be clear that **transformative change** is needed
- ✓ Need for **common approach** between government and industry and investors to “**Get the Transition done**”
- ✓ Focus on **solutions** and **shared benefits**
- ✓ **Transformation of investor and business environment** (“Brown to Green utilities”, Corporate Buyers, Oil Companies?)



GWEC Events



GWEC EVENTS

✓ GWEC organises **leading events in the wind industry**, China Wind Power, Brazil Wind Power, Vietnam Wind Power, Colombia Wind Power, Argentina Wind Power and the Global Offshore Wind Summit series (China, Taiwan, Japan and others)

✓ These official industry events are by the industry for the industry and benefit industry growth rather than private interests. GWEC's events **aim to increase the wind industry's policy influence** and engage key political stakeholders.

✓ GWEC is currently **adding a series of new events** on Global Offshore Wind, Corporate Sourcing and PPAs, as well as new countries such as Colombia.

✓ GWEC is also the **official partner for global events** such as Hamburg Global Wind Summit, WindEurope and AWEA.



Joining GWEC can give your organisation access to top level **speaking opportunities**.



Joining GWEC will give you access to **exclusive members only policy forums and networking events**.



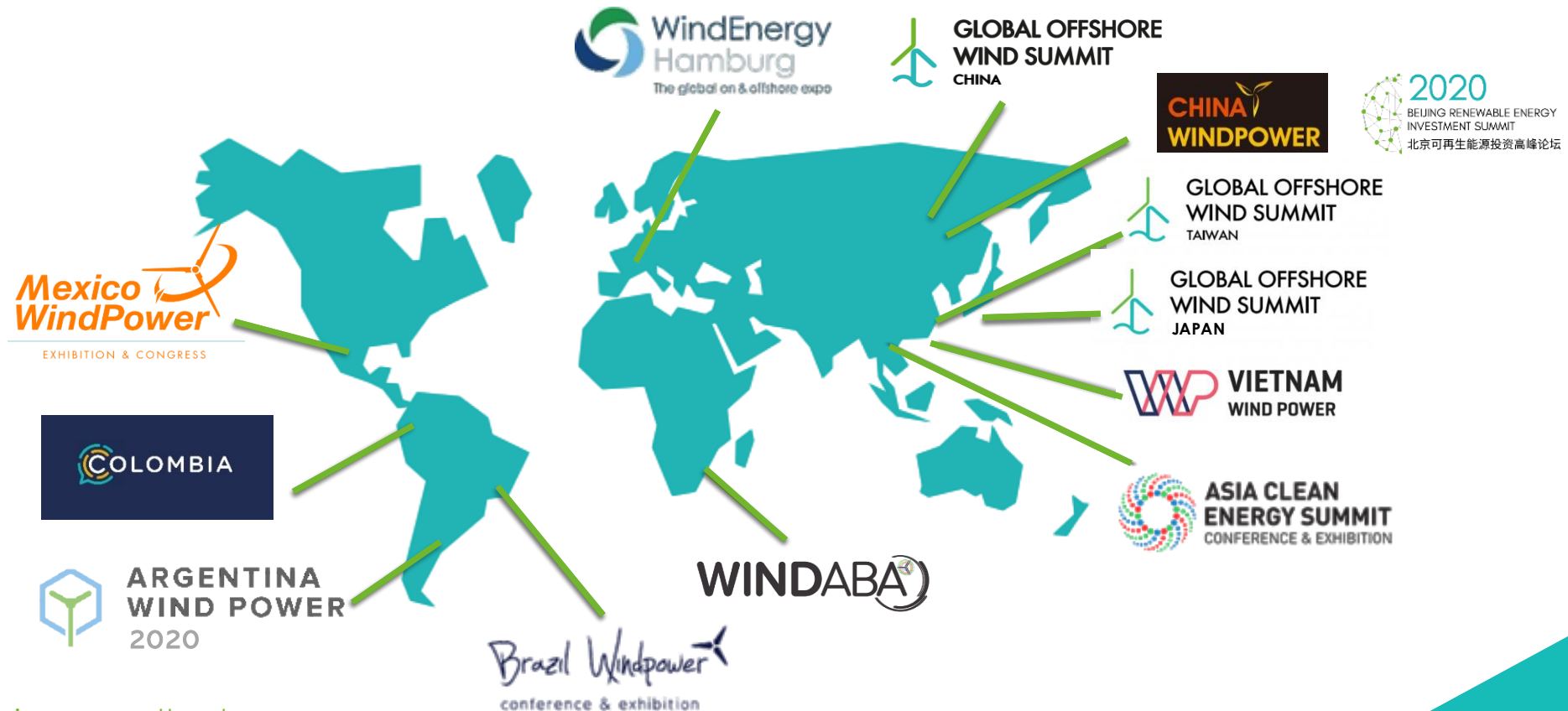
Joining GWEC will give you access to **exclusive discounts** on GWEC and partner events.

GWEC EVENTS - WHERE?

13 official industry events across the world in key emerging markets.

+110,000*

attendees across all of GWEC's events from the local and global industry.



GWEC EVENTS | 2020 CALENDAR

SECOND SEMESTER

9 - 10 JUN



26 - 28 AUG



12 - 14 OCT



13 - 16 OCT



26 - 30 OCT



27 - 28 OCT



3 - 4 NOV



25 - 26 NOV



1 - 4 DEC



*Dates may change due to covid19

Thank you!

For more information please contact:

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GWEC
GLOBAL WIND ENERGY COUNCIL
OPENING UP EMERGING
MARKETS FOR BUSINESS