



Latest wind energy data for Europe

Wind[°]
EUROPE

Autumn 2025

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Published in September 2025

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windeurope.org

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ACKNOWLEDGEMENTS:

WindEurope acknowledges the kind cooperation of the following associations and institutions:

EDORA and ODE (BE) / RES Croatia (HR) / Green Power Denmark (DK) / Tuuleenergia (EE) / Suomen Tuulivoimayhdistys ry (FI) / France Renewables (FR) / BWE, VDMA, Deutsche WindGuard (DE) / HWEA (EL) / WEI (IE) / Elettricità Futura, ANEV (IT) / LWEA (LV) / LWPA (LT) / Ministry of Energy and Spatial Planning (LU) / NWEA (NL) / Fornybar Norge (NO) / PWEA (PL) / APREN (PT) / RWEA (RO) / RES Serbia (RS) / SAPI (SK) / Svensk Vindenergi (SE) / AEE (ES) / TÜREB (TK) / UWEA (UA) / RenewableUK EnergyPulse (UK).

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DISCLAIMER

This report summarises new installations and financing activity in Europe's wind farms from 1 January to 30 June 2025. It also provides an update on the analysis from February 2025 of how European markets will develop in the coming years (2025 to 2030). The outlook is based on WindEurope internal analysis and consultation with its members.

The data represents gross installations per site and country unless otherwise stated. Rounding of figures is at the discretion of the author.

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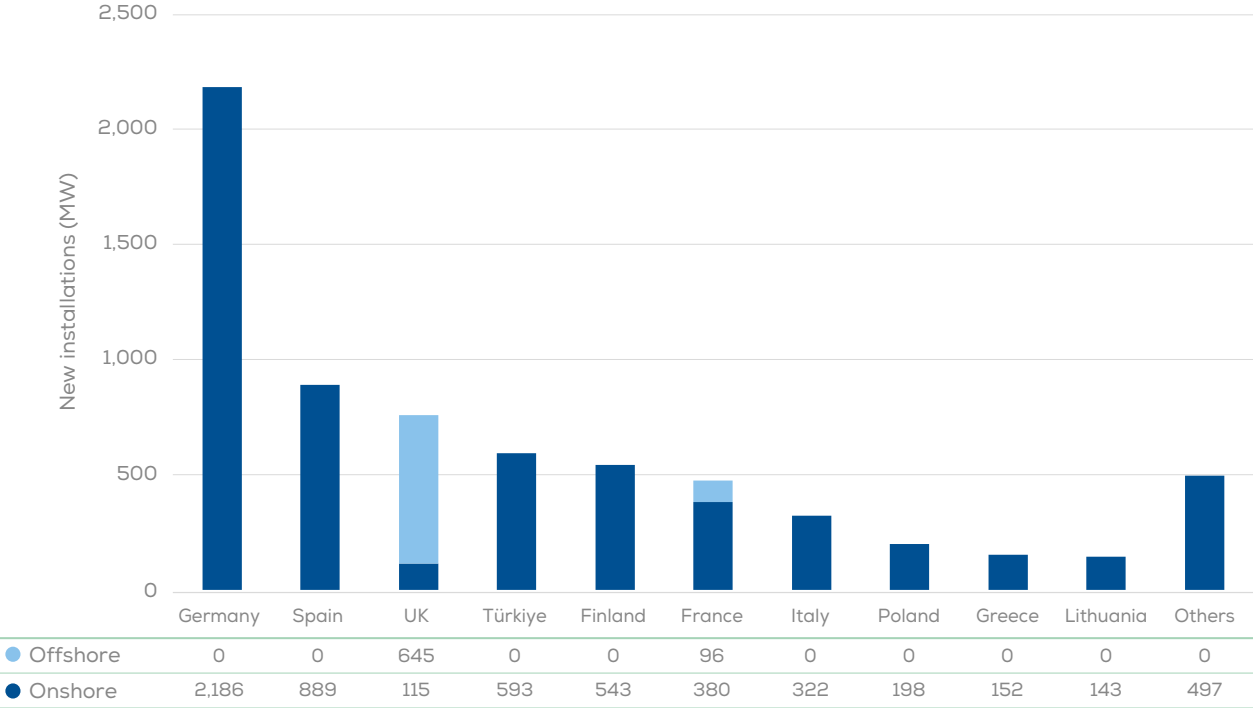
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Executive summary

EUROPE NOW HAS
291 GW
 OF WIND CAPACITY

FIGURE A. New onshore and offshore wind installations in Europe in H1 2025



Source: WindEurope

Here is the latest data for wind energy in Europe and our latest forecast for the rest of this decade.

Europe installed 6.8 GW of new wind power capacity in the first half of 2025. 5.3 GW of this was in the EU-27. 89% of the new capacity was onshore.

Germany built the most wind energy in H1 2025 (2.2 GW), followed by Spain (889 MW) and the UK (760 MW).

Europe now has 291 GW of wind power capacity. 254 GW of this is onshore and 37 GW offshore. The EU now has 236 GW of wind power capacity: 215 GW onshore and 21 GW offshore.

Europe took €34bn worth of Final Investment Decisions (FIDs) in new wind farms in H1 2025. This is more than the total investments in 2024. €22bn of this was for offshore wind - six large projects with a total capacity of 5.6 GW.

Europe ordered 11.3 GW of new wind turbines in H1 2025. This was 19% up on H1 2024. This figure breaks down: 8.8 GW onshore turbines and 2.5 GW offshore.

Europe’s Governments awarded 11.7 GW of new wind power capacity in auctions in H1 2025: 10.7 GW onshore and 1 GW offshore. Governments plan to auction a further 26.2 GW of wind energy capacity in the second half of 2025. This does not include the UK’s Allocation Round 7 and the fifth round of Ireland’s Renewable Electricity Support Scheme (RESS).

Onshore wind permitting volumes are improving. Of the six countries for which data is available, the volume of new permits awarded in H1 2025 rose by 39% compared with H1 2024.

New installations in H1 2025 were less than expected. We now expect new installations in 2025 to be 19 GW for the whole of Europe, and 14.5 GW for the EU, below our original estimates.

A slower pace of electrification, grid bottlenecks, ongoing permitting issues and poorly designed auctions in several countries all mean that wind energy is expanding less quickly than Governments want.

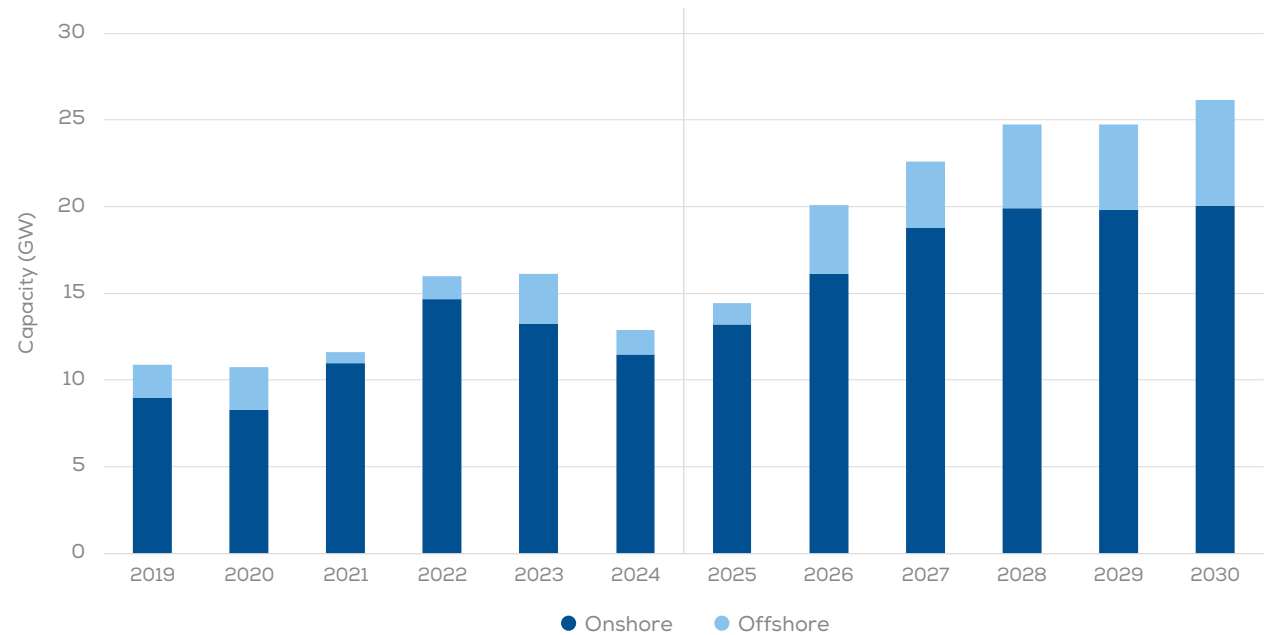
Restrictions in grid capacity, port capacity and vessel availability are also hindering the expansion of offshore wind.

We expect the EU to build 22 GW of new wind farms a year on average over the period 2025-2030.

We now expect the EU to have 344 GW of wind capacity installed by 2030: 298 GW onshore; 46 GW offshore. The EU target is 425 GW¹.

The project pipeline is healthy and we expect a strong build-out to continue beyond 2030.

FIGURE B. 2025-2030 annual wind power installations in the EU



Source: WindEurope

But Governments must prioritise the electrification of industry, the expansion and modernisation of electricity grids, investments in port infrastructure and the full implementation of the EU’s new permitting rules.

1. 2030 REPowerEU target reduced from 440 GW after the compromise target of 42.5% renewable energy for 2030 was reached in 2023

H1 2025 figures

- Europe installed 6.8 GW of new wind power capacity in H1 2025 (gross installations). Onshore wind made up 89% of new installations for a total of 6 GW.
- 5.3 GW was installed in the EU-27. Almost all of this was onshore (5.2 GW).
- New offshore wind installations in Europe were 741 MW.
- Germany installed the most new capacity in H1 2025 (2.2 GW), followed by Spain (889 MW), the UK (760 MW) and Türkiye (593 MW) came next, respectively.

Total installed capacity

- Europe now has 291 GW of installed wind power capacity: 254 GW onshore and 37 GW offshore.
- The EU-27 have 236 GW of installed capacity: 215 GW onshore and 21 GW offshore.

Market developments

- Onshore wind permitting volumes were up across H1 2025. Recorded volumes are up 40% in comparable markets relative to H1 2024.
- Europe's Governments awarded 11.7 GW of wind energy in auctions in H1 2025: 10.7 GW for onshore wind and 1 GW for offshore wind.
- Total investments from FIDs in new onshore and offshore wind farms amounted to €34bn. These investments will finance 14.1 GW of new wind power capacity, 8.5 GW onshore and 5.6 GW offshore.
- Wind turbine orders in Europe were up 19% compared with H1 2024. There were 11.3 GW of orders: 8.8 GW for onshore turbines and 2.5 GW for offshore turbines.
- Turbine orders in the EU-27 were up 10% on H1 2024 orders, at 10 GW.

2025-2030

- We now expect Europe to install 178 GW of new wind power capacity over 2025-2030. The EU-27 should install 133 GW of this – 22 GW a year on average.
- This will give the EU 344 GW of wind energy capacity by 2030: 298 GW onshore and 46 GW offshore.
- The slow pace of electrification is affecting the outlook for wind energy in Europe.
- Permitting remains too slow across most EU countries, except Germany, as others have failed to implement the EU permitting rules.
- Electricity grids are a further bottleneck to the build-out of wind energy. Grids are not expanding or modernising fast enough. Grid supply chain issues are causing delays and increasing costs for both onshore and offshore wind projects.
- Lack of visibility on future auction schedules and poorly designed support schemes are leading to delays in installations.
- Europe is also facing bottlenecks in the offshore wind value chain, which threaten to compound the grid issues. For example, port capacity is not expanding fast enough, and there are issues around the availability of installation vessels.

Wind power in H1 2025

1.1 Overview

Europe added 6.8 GW of new wind energy capacity in the first half of 2025; 6 GW onshore and 0.7 GW offshore. In the EU-27 5.3 GW were added; 5.2 GW onshore and 0.1 GW offshore.

Germany, Spain and the UK together installed 3.8 GW, 57% of Europe’s total, including 645 MW of offshore wind capacity in the UK.

In the previous outlook from our Wind Energy in Europe 2024 report, we foresaw 22.5 GW of new capacity being installed in 2025. The half-year installations amount to just 30% of this figure.

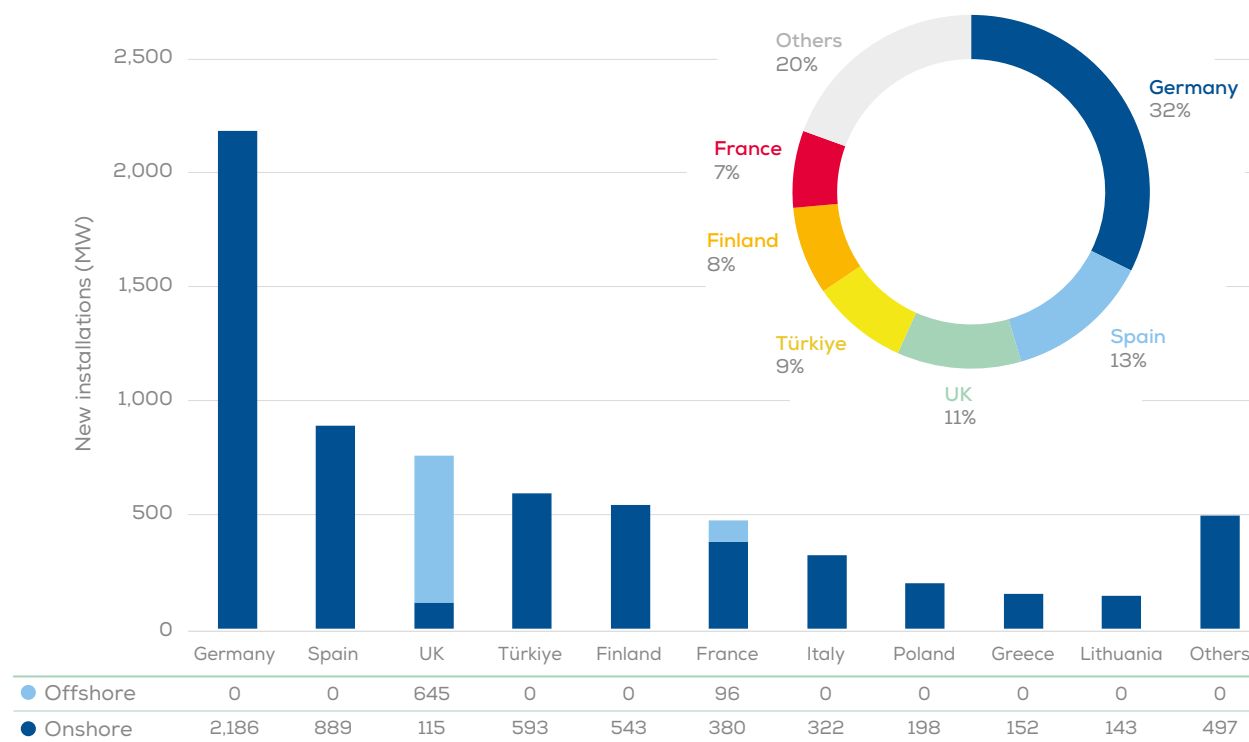
Installations are not carried out at an even or consistent rate throughout the year, however. Offshore wind installations in particular depend on weather conditions. On average over the past ten years, more offshore wind construction work has taken place in the second half of the year than in the first.

Despite this uncertainty we have revised our forecast for installations in Europe in 2025. Our new total estimate for this year is 19 GW, down from 22.5 GW.

We therefore expect 12 GW of new wind farms in the second half of the year. In the EU, we expect 9 GW of installations over the same period.

Chapter 3 looks at the onshore and offshore outlook in more detail.

FIGURE 1. New onshore and offshore wind energy installations in Europe in H1 2025



Source: WindEurope

1.2 Onshore installations

Installations of new onshore wind capacity in Europe were 6 GW in H1 2025 – by contrast, Europe installed 5.3 GW in H1 2024. Onshore installations tend not to be evenly distributed across the year. The installed capacity in the first six months of the year is often less than the capacity installed in the final six months of the year.

Germany, for instance, installed between 40% and 44% of its annual capacity in the first half of each year from 2022 to 2024. Finland followed a similar pattern, commissioning between 27% and 34% during the same period. More examples are given in Table 1 below.

Germany installed the most onshore wind energy capacity in H1 2025 with just under 2.2 GW. The new capacity came from 406 turbines with an average power rating of 5.4 MW—up from 5.2 MW in H1 2024. Decommissioning of 328 MW brought net additions to 1,859 MW, a 67% increase compared with the same period last year.

Germany is expected to add another 2.9 GW to reach 5.1 GW by the year’s end. This would mean that it has already installed 43% of the expected annual figure during H1 2025.

Spain installed the second largest onshore wind capacity in H1 2025 with 889 MW, slightly more than the 876 MW added in H1 2024. This new capacity came from 178 turbines with an average power rating of 5 MW, up from 4 MW in 2024.

We expect 1.5 GW of onshore wind energy installations in Spain this year, meaning that 59% of the total yearly estimate was installed in the first half of the year.

Türkiye installed the third largest onshore wind energy capacity in H1 2025 with 593 MW, up 39% from the 426 MW added in H1 2024. This new capacity came from 100 turbines with an average rating of 5.9 MW.

We expect Türkiye to install 1.6 GW in 2025 meaning that in the first half of 2025, it installed 37% of the expected total amount for the year.

Finland installed 543 MW of onshore wind in H1 2025, a 44% increase from the 377 MW added in H1 2024. The new capacity came from 85 turbines with an average rating of 6.4 MW.

We expect Finland to install 1.1 GW in 2025, meaning that during H1 2025, it has installed 48% of the forecasted total amount.

France installed 380 MW of onshore wind in H1 2025, 34% less than the 573 MW added in H1 2024. The new capacity came from 107 turbines with an average rating of 3.5 MW, up from 3.1 MW last year. Decommissioning of 20 MW brought net additions to 360 MW.

Stringent height restrictions in the French market limit the power ratings of installed turbines, leading to one of the lowest averages of newly installed turbine power ratings in Europe and limiting the potential benefits of onshore wind.

The 380 MW installation figure in H1 is just 21% of the previous 2025 onshore forecast of 1.85 GW. We now expect total installations of just over 1 GW in 2025, meaning 660 MW should be installed in the second half of the year.

TABLE 1. Onshore wind installations by mid-year in 2023 and 2024 for selected countries

Country	Onshore wind installations			
	H1 2023	H2 2023	H1 2024	H2 2024
Finland	439 MW	839 MW	377 MW	1,037 MW
France	713 MW	588 MW	573 MW	508 MW
Germany	1,565 MW	2,002 MW	1,308 MW	1,984 MW
Greece	253 MW	291 MW	97 MW	31 MW
Italy	259 MW	266 MW	335 MW	350 MW
UK	266 MW	335 MW	139 MW	600 MW

Italy installed 322 MW of onshore wind in H1 2025, slightly more than the 302 MW added in H1 2024. This came from 67 turbines with an average rating of 5.1 MW.

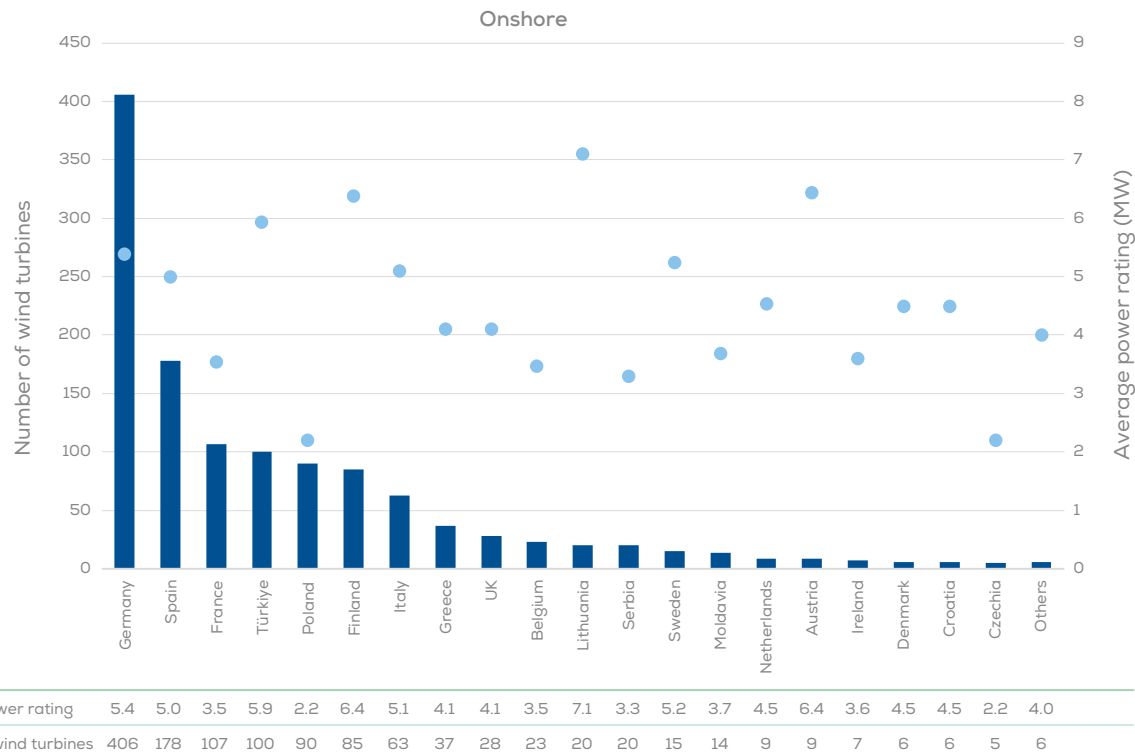
We expect Italy to install 740 MW in 2025 meaning that it installed 44% of the total forecast amount for 2025 in the first half of the year.

Rounding out the top 10 countries for newly installed onshore wind capacity in H1 2025 were **Poland** (198 MW), **Greece** (152 MW) and **Lithuania** (143 MW). Poland's onshore installations were 3.5 times more than those in H1 2024. Greece and Lithuania also installed more than in H1 2024, up 57% and 20% respectively.

We expect 0.6 GW of total new capacity from these countries in 2025. Out of this, Poland is due to install a further 252 MW, Lithuania 207 MW and Greece 148 MW in H2 2025.

The turbines installed in Lithuania had an average power rating of 7.1 MW. This makes it the country with the highest average power ratings for newly installed onshore wind turbines in the first half of 2025.

FIGURE 2. Number of turbines installed onshore in H1 2025 and their average power rating



Source: WindEurope

1.3 Offshore connected capacity

WindEurope reports new offshore wind energy capacity connected to the grid, rather than newly installed capacity. Offshore wind farms are in general significantly larger than onshore wind farms, and construction works tend to take longer. There are periods when turbines have been installed at the wind farm but are not yet connected to the grid, and not feeding renewable electricity into the grid at that point.

Europe connected 741 MW of new offshore wind capacity in the first half of 2025. This was 30% less than in H1 2024 when 1.1 GW was connected. All of the connected capacity came from just three projects in the UK and France.

The UK connected the most offshore wind capacity in H1 2025 - 645 MW in total. 429 MW were connected at Dogger Bank Phase A (1.2 GW) and 216 MW at Neart na Gaoithe (448 MW) - which is now fully commissioned.

60 turbines were connected during this period - 34 x 12.6 MW turbines at Dogger Bank Phase A and 26 x 8.3 MW turbines at Neart na Gaoithe. This gave an average power rating of 10.8 MW for connected offshore turbines.

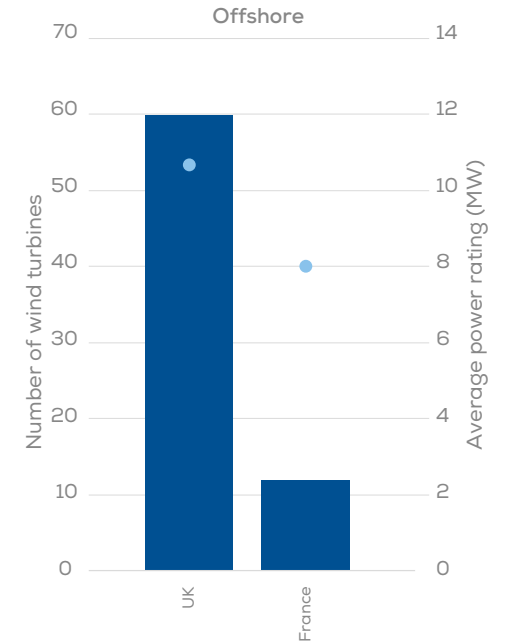
Total offshore additions are now expected to come to 1.8 GW. This shows that 36% of the total expected capacity in 2025 was connected in the first half of the year. The remaining added capacity should come from Dogger Bank Phase A, East Anglia Hub Three (1.4 GW), and Sofia (1.4 GW).

France connected 96 MW of offshore wind capacity in H1 2025, all from the Îles d'Yeu and Noirmoutier wind farm (488 MW). The 12 connected turbines are rated 8 MW.

The outlook for France is for 520 MW of new offshore wind capacity to be connected to the grid in 2025. This means that during H1 2025, France connected just 18% of the forecasted new offshore capacity.

Despite only 741 MW being connected to the grid in the first half of 2025 at three wind farms, eight other wind farms also saw some construction activity. In total, 171 foundations and 84 turbines were installed, but not all were connected by 30 June.

FIGURE 3. Number of turbines installed offshore in H1 2025 and their average power rating



● Average power rating	10.8	8.0
■ Number of wind turbines	60	12

Source: WindEurope

TABLE 2. New additions and total wind capacity in H1 2025

EU-27	New installations in H1 2025 (MW)			Cumulative capacity (MW)		
	Onshore	Offshore	Total	Onshore	Offshore	Total
Austria	58	-	58	4,086	-	4,086
Belgium	80	-	80	3,466	2,261	5,728
Bulgaria	-	-	-	711	-	711
Croatia	27	-	27	1,264	-	1,264
Cyprus	-	-	-	177	-	177
Czechia	11	-	11	382	-	382
Denmark	27	-	27	4,958	2,653	7,611
Estonia	-	-	-	711	-	711
Finland	543	-	543	8,829	71	8,900
France	380	96	476	23,243	1,596	24,839
Germany	2,186	-	2,186	65,383	9,121	74,504
Greece	152	-	152	5,506	-	5,506
Hungary	-	-	-	329	-	329
Ireland	25	-	25	4,861	25	4,886
Italy	322	-	322	13,237	30	13,267
Latvia	-	-	-	137	-	137
Lithuania	143	-	143	1,893	-	1,893
Luxembourg	-	-	-	214	-	214
Malta	-	-	-	-	-	-
Netherlands	41	-	41	6,997	4,739	11,736
Poland	198	-	198	10,431	-	10,431
Portugal	2	-	2	5,940	25	5,965
Romania	-	-	-	3,150	-	3,150
Slovakia	-	-	-	4	-	4
Slovenia	-	-	-	3	-	3
Spain	889	-	889	32,062	7	32,069
Sweden	79	-	79	17,087	195	17,282
Total EU-27	5,162	96	5,258	215,061	20,724	235,785

Others	New installations in H1 2025 (MW)			Cumulative capacity (MW)		
	Onshore	Offshore	Total	Onshore	Offshore	Total
Bosnia & Herzegovina	-	-	-	244	-	244
Faroe Islands	-	-	-	71	-	71
Iceland	-	-	-	3	-	3
Kosovo	-	-	-	137	-	137
Moldova	52	-	52	52	-	52
Montenegro	-	-	-	118	-	118
North Macedonia	30	-	30	103	-	103
Norway	-	-	-	5,087	101	5,188
Serbia	66	-	66	689	-	689
Switzerland	-	-	-	100	-	100
Türkiye	593	-	593	14,386	-	14,386
UK	115	645	760	15,818	16,577	32,395
Ukraine	-	-	-	1,947	-	1,947
Total others	856	645	1,501	38,754	16,678	55,432
Total Europe	6,018	741	6,759	253,816	37,401	291,217

Market developments in H1 2025

2.1 Permitting

Permitting continues to be a major obstacle to the expansion of wind energy across Europe. The revised EU Renewable Energy Directive (RED III) has started to improve the situation, but progress is still too slow to align permitting volumes with the EU's 2030 energy targets.

TABLE 3. Permitted onshore wind volumes in H1 2025 (MW)

	H1 2024	H1 2025	Change year-on-year
France	743	840	13%
Germany	5,021	7,851	56%
Greece	618	214	-65%
Ireland	228	481	111%
Italy	479	538	12%
UK	615	819	33%
	7,704	10,743	39%

Germany leads the way in issuing permits. Authorities approved a record volume of wind farms in 2024 and are on track to set a new record in 2025, with 7.9 GW of permits granted in H1 2025. This stems from the previous Government's comprehensive adoption of enhanced permitting rules in line with RED III. Despite regional differences, German permitting authorities now complete the process within an average of 18 months.

In other Member States, the transposition of the RED III provisions has moved too slowly. The European Commission launched infringement procedures against 26 out of 27 Member States in 2024, and implementation still falls short despite the Directive's strong potential.

France issued 840 MW of permits in H1 2025, up 13% on the same period of last year but still far below what is needed.

The UK saw a 33% increase compared to H1 2024, reaching 819 MW of permitted capacity.

Italy approved 538 MW of new permits, a 12% increase.

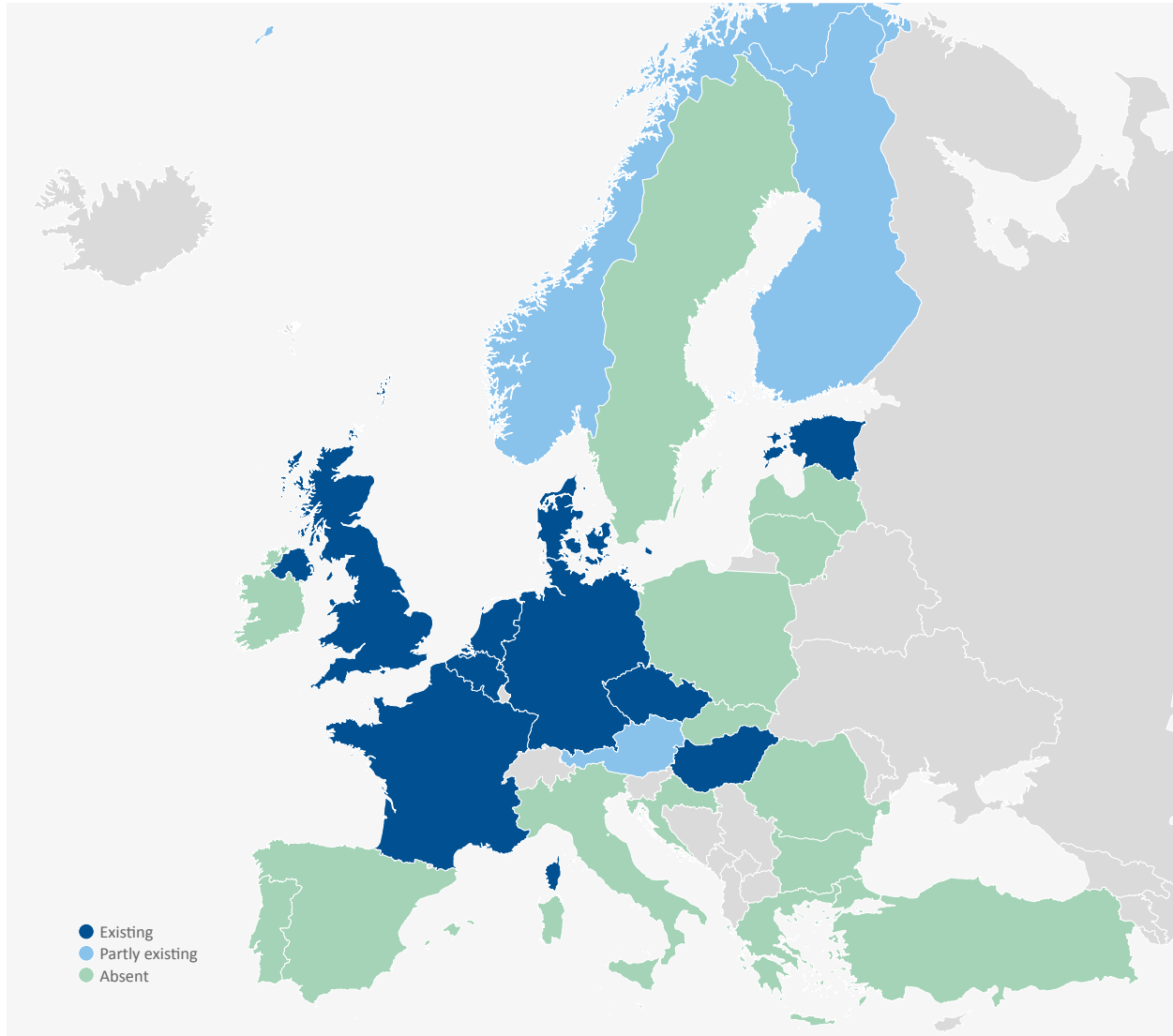
Ireland saw a 111% increase, reaching 481 MW thanks to a record first quarter. But the pace slowed in the second quarter due to staffing shortages, a common issue affecting permitting across many countries.

Greece, on the other hand, saw a 65% decrease year-on-year, issuing permits to just 214 MW of wind farms.

Digitalisation of permitting processes and the creation of one-stop shops are still lacking across much of Europe. These solutions could streamline and optimise permitting procedures.

Germany stands out as the only country applying the concept of Overriding Public Interest (OPI) for renewables. OPI has proven effective in unlocking large volumes of new wind projects and could offer similar benefits across other Member States.

FIGURE 4. European countries with one-stop shops for administrative permitting procedures



Source: WindEurope

2.2 Auctions and tenders

Eight countries awarded a total of 11.7 GW of wind capacity in the first half of 2025 - 10.7 GW for onshore wind and 1 GW for offshore wind.

The same figure for the first half of 2024 was 20.1 GW. This included 6.3 GW from the UK's Allocation Round 6 (AR6). Results from AR7 are expected in the second half of 2025. The full budget for AR7 will be published ahead of the sealed bid opening window later this year.

In addition to the UK's AR7 and Ireland's RESS 5, Governments in Europe plan to auction 26.2 GW of wind capacity in the second half of 2025. This includes 14.3 GW of onshore and 11.9 GW of offshore wind capacity.

Onshore wind energy auctions

In the first six months of 2025, Governments awarded 10.7 GW of onshore wind capacity across seven countries. This was 4 GW more than the onshore capacity awarded in H1 2024.

Nearly ¾ of the awarded capacity was for support from 20-year floating Feed-in-Premiums (7.8 GW), where projects are guaranteed a minimum price for the electricity they sell. 97% of this was awarded in Germany. The average strike price was €70/MWh across the awarded projects in Germany and Austria, down from an average of €73.6/MWh awarded across Europe in 2024³.

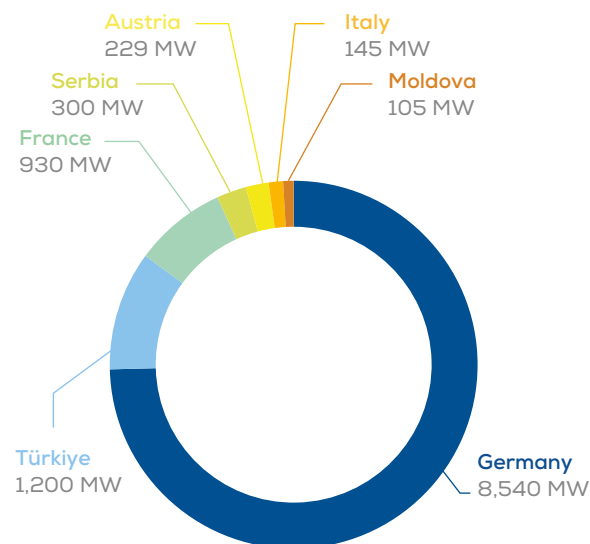
A further 1.5 GW (14%) of capacity was awarded 2-sided Contracts-for-Difference (CfDs) in France, Serbia, Italy and Moldova.

2. Although the Netherlands offers support through a Feed-in Premium scheme, the premium is not calculated as the difference between the strike price and the market price of electricity. It is therefore not included here. See page 31 for details.

Under 2-sided CfDs, projects receive a minimum price for the electricity they sell, as they do under the floating Feed-in-Premium model. But electricity sold in excess of this price is returned to the state. The projects therefore receive a fixed price for the power they sell. Since projects do not receive an “up-side” (when prices are high), strike prices tend to be higher than Feed-in-Premiums.

The average strike price for 2-sided CfDs for onshore wind in EU Member States in H1 was €78.1/MWh, down from €81.8/MWh in 2024. The average strike price is not just determined by the underlying costs of onshore wind but also by the markets awarding support. The average strike prices awarded in H1 2025 for example, varied between €53.5/MWh in Serbia and €87.6/MWh in France.

FIGURE 5. Share of awarded support in wind energy auctions in H1 2025



Source: WindEurope

1.2 GW (12%) of onshore capacity was awarded Feed-in-Tariffs in Türkiye following a tender launched in late 2024. Feed-in Tariffs pay a fixed price for all electricity produced. The awarded price was €33.5/MWh.

Poland’s July 2025 renewable energy auction awarded 2-sided CfDs to 83 MW of onshore wind, with strike prices ranging from €23.5 to €75.1/MWh.

Spain has not held a wind energy auction since 2022. This follows on from a failed round caused by an extremely low bidding price ceiling. Since then, the Government has been working to redesign the auction scheme to incorporate non-price criteria. It is not yet clear when the new scheme will be launched.

And lastly Italy has reduced the auction volume planned for 2025 by 1.5 GW, amid ongoing uncertainty surrounding the launch date of the full FER X scheme. This new scheme is set to replace the transitional FER X framework at the end of 2025.

Offshore wind energy auctions

Only one offshore site was awarded in H1 2025—a bottom fixed project in Germany with a total capacity of 1 GW. Authorities used negative bidding to award the site – the successful developer will pay €180m for the right to develop the project.

France planned to award two sites—AO7 and AO8—with a combined capacity of 2.8 GW in H1 2025. However, the results were postponed to H2 2025.

Governments plan to award nearly 12 GW in H2 2025. This includes 1 GW in the Netherlands via negative bidding and 10.9 GW through 2-sided CfDs in France, Poland, Ireland and Lithuania.

The UK is also expected to offer significant capacity in Allocation Round 7 (AR7) with 25 GW of projects eligible to bid, although the final the budget has yet to be confirmed.

Germany expected to award two sites totalling 2.5 GW via negative bidding in August 2025. However, the auctions were unsuccessful as no bids were received. This follows the failed 2024 Danish offshore wind auction for 3 GW, which featured a negative bidding model but attracted no bids.

See the appendix for more details broken down by country.

2.3 Financed capacity

The first six months of 2025 saw €34bn worth of investments in wind farms, more than the total investment figure for the whole of 2024. The investments in H1 2025 financed 14.1 GW of new wind capacity that will be commissioned over the next few years.

Onshore wind investments in Europe totalled €11.9bn and financed approximately 8.5 GW of new onshore wind capacity.

In the EU, onshore investments totalled €7bn financing 5.1 GW of new projects. Total investments came to more than €25bn and financed 9.7 GW of new onshore and offshore wind capacity, including five offshore wind project FIDs.

After several years of lower investment figures for onshore wind, following the economic shock of the pandemic and Russia’s invasion of Ukraine, investments returned to pre-pandemic levels in 2024. In terms of new onshore capacity financed it was second only to 2021, with 17.3 GW of new capacity.

Onshore wind investments in H1 2025 were around half of the 2024 figure, pointing to a sustained recovery in onshore wind financing. But these investments are still not sufficient to meet the volumes required for the expansion of wind capacity in Europe.

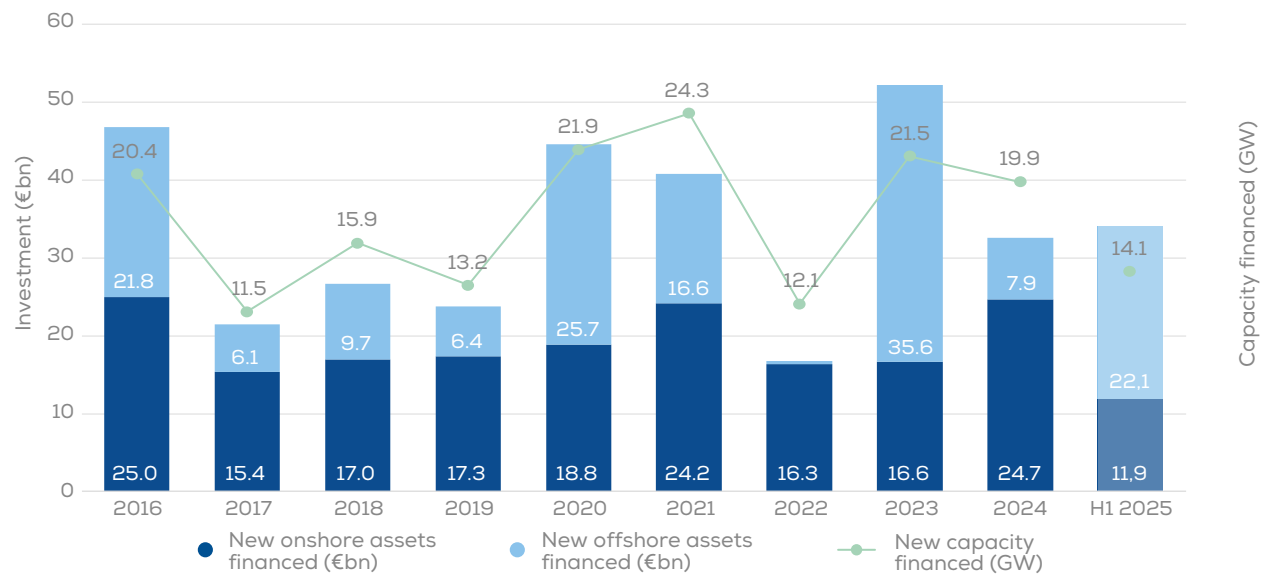
Since offshore wind farms tend to be very large in scale (with many of them measured in GW) only a few offshore wind FIDs take place in any given year. This means that offshore wind investment figures are volatile on an yearly basis and are highly dependent on the timing of these large transactions.

Six offshore wind farms with a combined capacity of 5.6 GW reached FID, raising approximately €22.1bn in capital. These included the first three offshore wind farms in Poland; Baltica 2 (1,498 MW), Baltyk II (720 MW) and Baltyk III (720 MW).

In the UK, Inch Cape (1,080 MW) and in Germany Nordlicht 1 (980 MW) and Nordlicht 2 (630 MW) reached FID.

All six wind farms are expected to be operational by the end of 2028.

FIGURE 6. Investment in new wind farms 2016 - H1 2025 (GW and €bn)



Source: WindEurope

2.4 Wind turbine orders

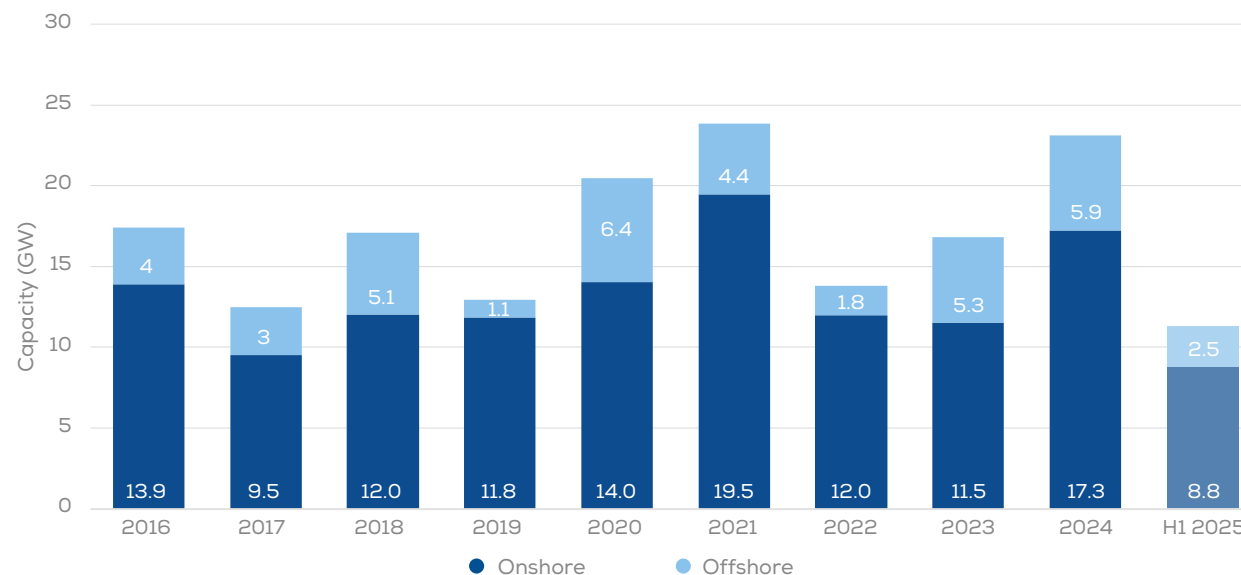
Europe saw 11.3 GW of firm turbine orders in the first six months of 2025 - 8.8 GW for onshore wind turbines and 2.5 GW for offshore turbines. This is a jump of nearly 20% increase compared to the 9.5 GW ordered in H1 2024.

Onshore wind turbines ordered had an average power rating of 6.3 MW, up from 5.8 MW in H1 2024. This sets a new record for the average size of ordered onshore turbines.

Two offshore wind projects placed turbine orders, with one selecting 14 MW turbines and the other opting for 15 MW turbines. This gives an average power rating of 14.4 MW for offshore turbines ordered in H1 2025.

In the EU, there were orders for approximately 10 GW of new wind power capacity, a 12% increase compared with H1 2024. All of the offshore orders were within the EU (2.5 GW).

FIGURE 7. Annual volume of wind turbine orders (GW)



Source: WindEurope

2025-2030

WindEurope’s Outlook for wind installations looks at the likely development of wind power capacity in Europe up to 2030.

The Outlook sets out the best estimate for installed capacity in Europe to 2030, including any likely political or economic developments which could affect installations. We consider the latest developments in EU regulation, national policies, announcements of signed Power Purchase Agreements (PPAs), project development timelines and the ability of wind to secure further capacity in upcoming auctions and tenders.

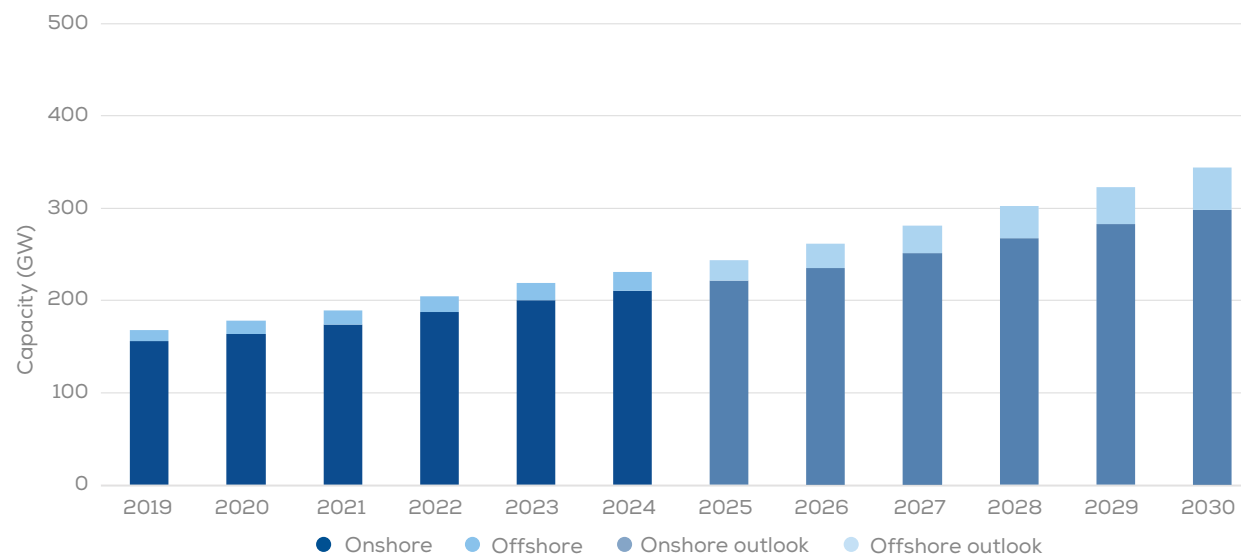
Bottlenecks continue to hold back the build-out of wind energy. Permitting delays and grids are still particularly challenging.

The slower-than-expected rate of electrification across Europe is also weakening the business case for wind. This has led to a downward revision in the onshore and offshore wind outlook to 2030.

We now expect the total installed capacity in Europe to reach up to 441 GW by 2030 – 361 GW will be onshore with 80 GW installed offshore.

Expected additions point to the EU having a total of 344 GW of installed wind capacity by 2030. This breaks down to 298 GW onshore and 46 GW offshore. The EU today has 236 GW of wind energy capacity. Its 2030 target is 425 GW³.

FIGURE 8. Evolution of cumulative wind energy capacity in the EU



Source: WindEurope

3. Based on 2030 REPowerEU wind energy production targets after the compromise target of 42.5% renewable energy by 2030 was reached in 2023.

3.1 Onshore wind outlook

Onshore wind is still expected to make up the vast majority of installations up to 2030. Factoring in the 6 GW installed in H1 2025, we expect 135 GW of new capacity to be installed over the period 2025 to 2030, 75% of the total forecasted new capacity for Europe of 180 GW.

Taking account of expected rates of decommissioning over this period, we expect total onshore wind installations in Europe to reach 361 GW by 2030.

In the EU, new onshore capacity up to 2030, including the 5.2 GW installed in H1 2025, are expected to reach 108 GW, 80% of the total of 135 GW to be installed by 2030. Total installed onshore wind capacity in the EU is expected to reach 298 GW.

Over the first six months of 2025, political and market developments have affected the outlook for certain countries.

Germany’s outlook has improved due to strong permitting activity, oversubscribed auctions, and continued support from the new Government, which has built on effective measures introduced by the previous administration. We now expect over 43 GW of installations up to 2030, including the 2.2 GW installed in H1 2025.

By contrast, recent developments have led us to scale back our expectations for Spain, France, Sweden, Denmark and Italy.

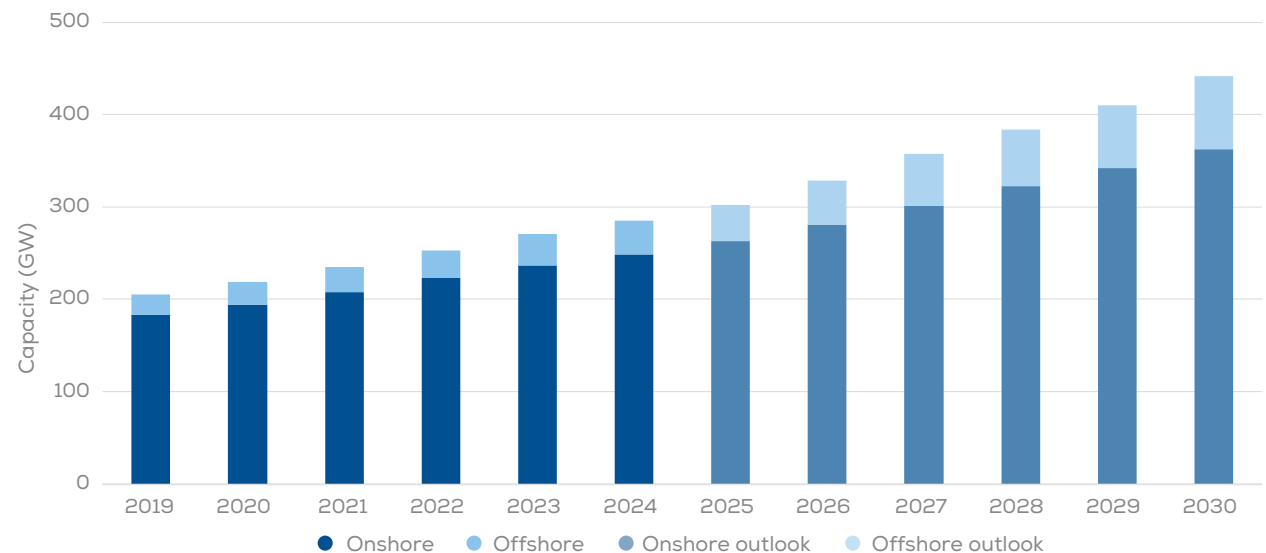
In Spain and Denmark, the absence of wind auction schemes, the impact of solar PV-driven electricity price cannibalisation and the slow rate of electrification have weakened the business case for new merchant wind projects.

There were no wind turbine orders in Sweden in H1 2025. Higher grid balancing charges in certain regions and persistently low electricity prices have made conditions worse for investors. Demand growth has also been slower than expected.

In France the 2027 Presidential election, where the far-right—currently leading in polls—actively opposes wind energy and the delay of the third Multiannual Energy Programme (PPE3) have created uncertainty for auctions beyond 2025.

And lastly, we have slightly scaled back the outlook for Italy after the auction volume planned for 2025 was reduced from 4 GW to 2.5 GW. This combines with the continued uncertainty regarding the launch date for the full FER X scheme - set to replace the Transitional FER X scheme at the end of 2025.

FIGURE 9. Evolution of cumulative wind power capacity in Europe



Source: WindEurope

Auctions and tenders are set to play a major role in the build-out of onshore wind. Over two thirds of new capacity in the EU by 2030 will be awarded in central auctions. The remaining capacity will either be supported by the expanding corporate PPA market or on an entirely merchant basis in some markets.

Figure 10 sets out the expected rate of annual onshore installations in the EU by support type. Capacity labelled as “Already awarded in auctions” indicates those projects which have already been successful in auctions, and which have revenue support in place. These projects are very likely to be developed and account for nearly 36 GW over the period 2025-2029.

The light blue category labelled “Scheduled to be auctioned” shows capacity that we expect to be awarded in auctions which have already been scheduled and which will take place over the next few years. We cannot assume that all of the capacity offered will be awarded, and different markets can expect varying degrees of success in terms of offered capacity being awarded.

We expect 31 GW of total wind capacity to be awarded in auctions and built over the period 2027-2030.

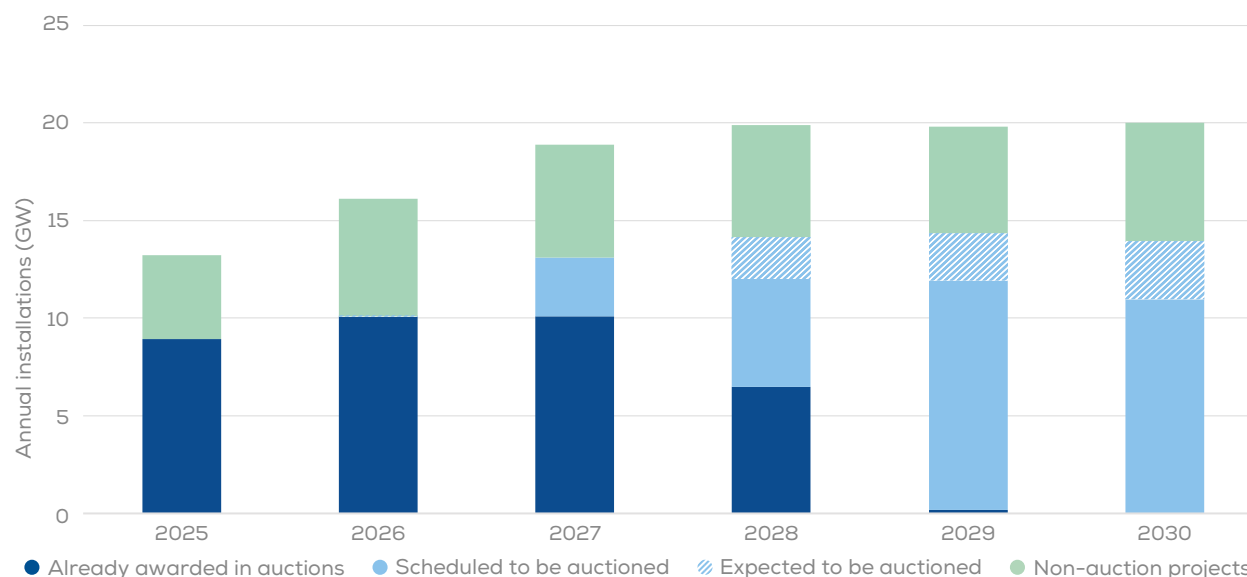
The patterned light blue labelled “Expected to be auctioned” is the capacity likely to be awarded in auctions that have not yet been finalised. In many cases the auctions have been announced but the details have not been finalised, or there is no schedule in place yet. Over the rest of the decade up to 2030, the total capacity that will be commissioned from this category is just over 7 GW.

Total onshore installations in the EU over the period 2025-2030, including H1 2025, are expected to come to 108 GW. We therefore see at least 74 GW or 69% of this coming from wind farms awarded in auctions.

The light green area labelled “Non-auction projects” represents wind power capacity developed without going through central auctioning systems, i.e. projects which will either be supported through Power Purchase Agreements (PPAs) or developed on an entirely merchant basis.

In some markets like Sweden and Finland there is no support provided by the Government, so all projects are developed in this way. The capacity expected to be developed on a merchant or PPA basis encompasses those markets plus a proportion of project capacity in other markets – including those with centralised auction systems. We expect a total capacity of 33 GW to be developed on a merchant or PPA basis from 2025. This is less than expected last year due to worsening conditions in key merchant markets like Sweden, Spain and Denmark.

FIGURE 10. Breakdown of auctioned and non-auctioned new build onshore projects in the EU



Source: WindEurope

3.2 Offshore wind outlook

Europe has bold ambitions for offshore wind. In many ways, it is ideally suited— there is an abundance of shallow sea available with very good wind resource, particularly in the North and Baltic Seas. And Europe has long been the global leader in offshore wind development with a strong supply chain and track record.

Governments across Europe have recognised the benefits of offshore wind. Initially setting a combined 2030 target of 114 GW at the start of 2021, they later revised this upward, raising the maximum target to 158 GW in September 2022.

Since this peak, many National Governments have scaled back their 2030 targets as they realise that the time needed to establish a political framework for offshore wind, upgrade electricity grids to connect projects, and develop local supply chains makes delivering on these targets a significant challenge.

Recently other factors have led to further delays in project development. In the Netherlands for example, a three-year delay at the Ijmuiden Ver Beta project was announced in H1 2025 due to slower than anticipated demand for green hydrogen, pushing back the expected commissioning date for the 1.3 GW project beyond 2030.

In the UK rising costs, supply chain challenges and difficult financing conditions were the reasons given for the cancellation of Hornsea 4 - a 2.4 GW project.

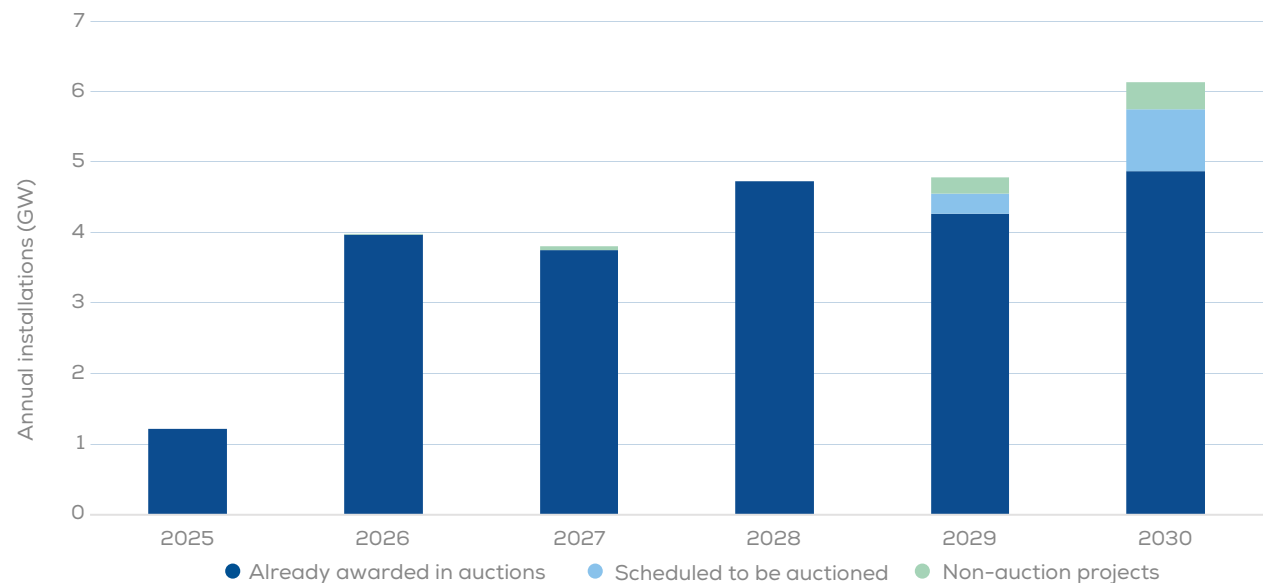
But despite the fact that we are unlikely to develop offshore wind as quickly as hoped, markets are still being developing nonetheless. Many will see new projects entering the electricity system shortly after the turn of the decade.

Across Europe, we now expect offshore wind installations over the period 2025-2030 to exceed 43 GW, including capacity already connected in H1 2025. This would bring Europe’s total installed offshore wind capacity to 80 GW by 2030.

Figure 11 sets out expected annual offshore wind installation figures in the EU by their current status. The total amount, including the 96 MW installed in H1 2025, is 25 GW which would take the EU’s installed capacity to 46 GW in 2030.

In dark blue labelled “Already awarded in auctions” is all the capacity that has been awarded in auctions across the EU (including countries where no revenue support is awarded). This capacity is likely to be installed on time as the projects have already taken FIDs or are expected to shortly and therefore have all supply and construction contracts in place. The total capacity of projects under this category is 23 GW.

FIGURE 11. Breakdown of auctioned and non-auctioned new build offshore projects in the EU



Source: WindEurope

Capacity from projects in the light blue category labelled “Scheduled to be auctioned” marks out projects which are set to take part in auctions over the next couple of years. These projects are likely to be developed but there is some uncertainty on their timing given that they have not yet secured the rights to develop. These projects make up an additional 1 GW which could be installed in the EU by 2030.

The light green area labelled “Non-auction projects” represents a small number of projects developed in open door regimes such as in Sweden and Finland. There is great uncertainty regarding the timing of these projects but we believe they have a realistic chance of being installed by 2030. The total capacity represented by these projects over 2025-2030 is approximately 0.7 GW.

In Europe, 35 GW out of the total expected installation figure of 43 GW have already been awarded in auctions, with a further 7 GW due to be auctioned over the next few years. Projects developed outside of auction systems are also expected to add up to 0.7 GW by 2030.

TABLE 4. Expected new installations per country, 2025-30

EU-27 (MW)	2025		2026		2027		2028		2029		2030		Total installations by 2030	
	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore
Austria	320	-	270	-	620	-	720	-	350	-	350	-	6,240	-
Belgium	180	-	180	-	250	-	250	-	250	-	250	-	4,230	2,260
Bulgaria	30	-	90	-	100	10	130	-	140	-	150	-	1,100	10
Croatia	70	-	50	-	50	-	170	-	120	-	260	-	1,950	-
Cyprus	-	-	-	-	-	-	-	-	-	-	-	-	170	-
Czechia	20	-	30	-	50	-	90	-	110	-	130	-	770	-
Denmark	50	-	60	360	80	770	90	-	110	220	130	330	4,680	4,290
Estonia	-	-	-	-	150	-	240	-	430	-	460	-	1,910	-
Finland	1,130	-	970	-	1,210	-	1,470	-	1,490	-	1,500	-	15,540	70
France	1,040	520	1,500	520	1,500	460	1,500	-	1,500	130	1,500	540	29,000	3,670
Germany	5,130	320	7,000	2,090	8,000	770	8,000	1,470	7,800	1,980	7,300	2,780	101,680	18,530
Greece	300	-	490	-	430	-	400	-	350	-	350	-	7,480	-
Hungary	-	-	20	-	50	-	100	-	150	-	180	-	790	-
Ireland	350	-	350	-	480	-	480	40	530	270	550	690	6,990	1,020
Italy	740	-	770	-	1,200	-	1,500	-	1,500	-	1,500	20	19,450	50
Latvia	-	-	260	-	330	-	260	-	330	-	360	-	1,670	-
Lithuania	350	-	450	-	350	-	300	-	300	210	300	420	3,780	630
Luxembourg	10	-	70	-	50	-	80	-	40	-	50	-	510	-
Malta	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Netherlands	150	-	280	250	190	770	210	1,230	230	1,630	250	450	7,290	9,070
Poland	450	380	380	760	570	1,060	680	2,110	860	480	1,130	540	13,400	5,330
Portugal	230	-	230	-	380	-	500	-	500	-	500	-	6,650	20
Romania	380	-	490	-	600	-	550	-	500	-	500	-	6,100	-
Slovakia	-	-	50	-	80	-	100	-	120	-	120	-	470	-
Slovenia	-	-	-	-	-	-	30	-	40	-	40	-	110	-
Spain	1,500	-	1,500	-	1,500	-	1,500	-	1,500	-	1,500	290	36,060	300
Sweden	800	-	640	-	540	-	550	-	570	-	590	80	20,400	270
Total EU-27	13,230	1,220	16,130	3,980	18,760	3,840	19,900	4,850	19,820	4,920	19,950	6,140	298,420	45,520

Others (MW)	2025		2026		2027		2028		2029		2030		Total installations by 2030	
	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore	Onshore	Offshore
Albania	-	-	70	-	80	-	80	-	180	-	180	-	590	-
Bosnia & Herzegovina	70	-	130	-	270	-	50	-	180	-	90	-	1,030	-
Faroe Islands	-	-	-	-	-	-	-	-	-	-	-	-	70	-
Iceland	-	-	60	-	60	-	-	-	-	-	-	-	120	-
Kosovo	-	-	70	-	-	-	20	-	50	-	80	-	360	-
Montenegro	50	-	80	-	110	-	50	-	-	-	-	-	410	-
North Macedonia	30	-	200	-	210	-	-	-	-	-	-	-	510	-
Norway	-	-	-	-	-	-	150	-	180	-	190	450	5,380	550
Serbia	70	-	300	-	300	-	300	-	130	-	160	-	1,880	-
Switzerland	-	-	70	-	60	-	100	-	50	-	30	-	410	-
Türkiye	1,600	-	1,900	-	2,300	-	2,240	-	2,240	-	2,240	-	26,150	-
UK	700	1,810	750	4,060	2,300	3,850	1,930	1,140	1,830	1,240	2,200	5,540	24,070	33,540
Ukraine	300	-	500	-	-	-	-	-	-	-	-	-	1,980	-
Total others	2,820	1,810	4,130	4,060	5,690	3,850	4,920	1,140	4,840	1,240	5,170	5,990	62,960	34,090
Total Europe	16,050	3,030	20,260	8,040	24,450	7,690	24,820	5,990	24,660	6,160	25,120	12,130	361,380	79,610

Appendix: auctions breakdown

Onshore wind auctions in H1 2025 and beyond

Germany held two technology-specific auction rounds in H1 2025, offering support for 7.5 GW of onshore wind capacity and awarding the full volume. This was an 81% increase compared to H1 2024, when 4.2 GW was awarded from an offered volume of 5.3 GW. Two further rounds are planned for H2 2025, with a combined capacity of 6.9 GW. The Federal Network Agency (BNetzA) may adjust the final supported volumes. Germany expects to offer support for 14.4 GW of onshore wind in 2025. If full allocation continues, this would result in 3.4 GW more awarded capacity than in 2024 (11 GW), marking a 31% increase year-on-year. The support mechanism remains a 20-year Feed-in-Premium.

Türkiye awarded support for 1.2 GW of onshore wind across five wind farm sites at the beginning of 2025, under a YEKA auction round launched in late 2024. Under the latest YEKA model, successful bidders can sell electricity on a merchant basis for six years following the agreement. After this period, they will receive a Feed-in-Tariff for 20 years.

France held one technology-specific auction round in H1 2025, offering support for 925 MW and awarding 930 MW. This is below the 1,058 MW awarded in the sole round held in H1 2024. A second round is scheduled for H2 2025, also targeting 925 MW. If fully allocated, nearly 1.9 GW of onshore wind could receive support in 2025, around 10% more than in 2024. Additionally, a

technology-neutral auction will offer support for 500 MW of either onshore wind or solar PV. Both schemes provide a 20-year 2-sided CfD, with strike prices indexed to inflation.

Serbia fully allocated the 300 MW onshore wind auction launched in 2024, awarding capacity across five wind farms. Another 300 MW auction round is due in 2025. Winners receive a 15-year 2-sided CfD.

Austria awarded support for 226 MW of onshore wind across two technology-specific auction rounds in H1 2025. These rounds aimed to allocate 357 MW, resulting in a 63% allocation rate. This marks an increase from H1 2024, when Austria awarded 162 MW out of a targeted 282 MW (57% allocation rate). Two more auctions are planned for H2 2025, targeting 274 MW. The support mechanism remains a 20-year Feed-in-Premium.

Moldova awarded support for 105 MW of onshore wind in its first-ever auction launched in 2024. A second auction is expected later in 2025 to support 170 MW of onshore wind with storage, with awards expected in 2026. Support will come from a 15-year Power Purchase Agreement, which will convert into a 2-sided CfD once an electricity market is established.

Italy held one auction round in H1 2025 under its FER 1 scheme, awarding 145 MW of onshore wind. In H1 2024, a similar technology-neutral auction awarded 98 MW. Neither round had a predefined capacity limit. The FER 1 scheme has now been replaced by the Transitional FER X scheme, which includes dedicated onshore wind auctions. The first FER X round will offer support for 2.5 GW. Both schemes offer a 20-year 2-sided CfD. Under FER X, the maximum bidding price drops as the bidding volumes increase and is indexed to the national producer price index for industry. Strike prices are also indexed to the national consumer price index.

The Netherlands awarded support to 289 MW of onshore wind capacity under its SDE++ scheme. Recipients receive support structured as a Feed-in Premium for a duration of 15 years, whereby the Government compensates the difference between production costs and expected market revenues.

Poland held its annual technology-neutral auction round in H2 2025, awarding 83 MW of onshore wind. Winners receive a 15-year 2-sided CfD, with strike prices indexed to the Consumer Price Index.

Table A Onshore wind auctions in H1 2025 and beyond

H1 2025	Auction	Type of auction	MW available	MW awarded	Allocation rate	Policy mechanism	Strike price
Austria	EAG-Technology specific Feb-Mar round	Specific	200	143	72%	Feed-in-Premium	€95.8/MWh
Austria	EAG-Technology specific May-Jun round	Specific	157	83	53%	Feed-in-Premium	€96.0/MWh
Austria	EAG-Technology neutral Jan-Feb round	Neutral	40	3	8%	Feed-in-Premium	€100.0/MWh
France	AO PPE 2 Eolien terrestre- 9th round	Specific	925	930	101%	Contract-for-Difference	€87.6/MWh
Germany	EEG-Technology specific Feb round	Specific	4,094	4,094	100%	Feed-in-Premium	€70.0/MWh
Germany	EEG-Technology specific May round	Specific	3,443	3,446	100%	Feed-in-Premium	€68.3/MWh
Germany	EEG-Technology neutral innovation May round	Neutral	485	-	0%	Feed-in-Premium	N/A
Italy	FER 1- 16th round	Neutral	N/A	145	N/A	Contract-for-Difference	€75.8/MWh
Moldova	2024 auction	Specific	105	105	100%	Contract-for-Difference	€67.2/MWh
Netherlands	2025 SDE++	Neutral	N/A	289	N/A	Feed-in-Premium	N/A
Serbia	2024 auction	Specific	300	300	100%	Contract-for-Difference	€53.5/MWh
Turkey	YEKA RES-2024	Specific	1,200	1,200	100%	Feed-in-Tariff	€33.5/MWh
H2 2025	Auction	Type of auction	MW available	MW awarded	Allocation rate	Policy mechanism	Strike price
Austria	EAG- Technology specific Sept round	Specific	100	-	-	Feed-in-Premium	-
Austria	EAG- Technology specific Oct-Nov round	Specific	100	-	-	Feed-in-Premium	-
Czechia	2025- 1st round	Specific	180	-	-	Contract-for-Difference	-
France	AO PPE 2 Neutre- 4th round	Neutral	500	-	-	Contract-for-Difference	-
France	AO PPE 2 Eolien terrestre- 10th round	Specific	925	-	-	Contract-for-Difference	-
Germany	EEG- Technology specific Aug round	Specific	3,443	-	-	Feed-in-Premium	-
Germany	EEG- Technology specific Nov round	Specific	3,443	-	-	Feed-in-Premium	-
Germany	EEG- Technology neutral innovation Sept round	Neutral	485	-	-	Feed-in-Premium	-
Ireland	RESS 5	Neutral	-	-	-	Contract-for-Difference	-
Italy	Transitory FER X 2025	Specific	2,500	-	-	Contract-for-Difference	-
Kosovo	1st onshore auction	Specific	150	-	-	Contract-for-Difference	-
Moldova	2025 auction	Specific	170	-	-	Contract-for-Difference	-
Poland	2025 technology neutral auction	Neutral	-	83	-	Contract-for-Difference	€23.5-75.1/MWh
Romania	2nd technology specific auction	Specific	2,000	-	-	Contract-for-Difference	-
Serbia	3rd technology specific auction	Specific	300	-	-	Contract-for-Difference	-
UK	CfD Allocation Round 7- Pot 1	Neutral	-	-	-	Contract-for-Difference	-

Offshore capacity awarded in auctions in H1 2025

Germany awarded 1 GW of offshore wind in H1 2025 at the N-9.4 site. The concession was secured through dynamic bidding, where multiple zero-cent bids triggered multiple negative bidding rounds. Authorities expected to award an additional 2.5 GW in H2 2025 across two sites (N-10.1 and N-10.2), using negative bidding and non-price criteria. However, no bids were received in August, and the auction failed.

The UK will tender support to bottom-fixed (Pot 3) and floating (Pot 4) offshore wind projects in H2 2025 under the UK Contract-for-Difference Allocation Round 7 auction scheme. The bidding window opened in August 2025, with awards expected by year-end at the earliest. Bids will be ranked by price-only. However, the awarding body will grant a premium (Clean Industry Bonus) to winners who commit to invest in domestic supply chains, particularly in deprived areas. As of this year, the duration of the support, a 2-sided CfD, will be increased to 20 years, up from 15 years. The auction could see up to 25 GW of offshore wind capacity eligible to bid. Strike prices are indexed to the Consumer Price Index.

France plans to award 5.3 GW across six sites in H2 2025. Three of these sites are bottom-fixed (Oléron 1, Centre Manche 2, Oléron 2), and three are floating (Brittany South 2, Narbonnaise 2, Golfe de Fos 2). Bid ranking will include price and non-price criteria focused on social, territorial and environmental issues. Support will be provided through a 20-year 2-sided CfD with strike prices indexed to inflation using industry indices.

Poland aims to award 4 GW of offshore wind in H2 2025. Bids will be ranked based on price only. Support will be provided through a 25-year 2-sided CfD. Maximum prices vary by location: PLN 485.71/MWh (~€116/MWh) near the coast, PLN 499.33/MWh (~€119/MWh) for mid-range sites, and PLN 512.32/MWh (~€122/MWh) for the farthest areas. Strike prices will be indexed to the Consumer Price Index.

Denmark will open a 3 GW auction in H2 2025 across three sites: Hesselø, Nordsøen I Midt and Nordsøen I Syd. After a failed tender in 2024 and a cancelled round in H1 2025, Denmark revised its auction design. The country now offers up to DKK 27.6bn (€3.7bn) using a 20-year 2-sided capability-based CfD model. Bids are due in spring 2026 for Nordsøen I Midt and Hesselø, and spring 2027 for Nordsøen I Syd.

The Netherlands will award 1 GW of offshore wind in H2 2025 at the Nederwiek Zuid I-A site. Bids will be ranked using negative bidding and non-price criteria focused on ecology.

Ireland will launch the auction for the 900 MW Tonn Nua offshore wind site in September 2025, with the results expected to be announced by year-end.

Lithuania will hold its second offshore wind auction in H2 2025, after cancelling the first round in 2024 due to receiving only one bid. The country plans to allocate support through a 15-year 2-sided CfD with a €125/MWh ceiling and a €75/MWh floor. Indexation of the awarded strike price will apply for up to eight years before generation begins, capped at 2%. The available capacity is 700 MW, and the winner will be announced in H2 2025.

Belgium has announced that the auction for Lot 1 (700 MW) of the Princess Elizabeth Zone will be postponed to the first quarter of 2026.

Italy has indicated that, although four offshore wind projects totalling 2.2 GW are eligible to participate in the FER 2 auction scheme, the first auction round will not take place before the first quarter of 2026.

Table B. Offshore wind auctions in H1 2025 and beyond

H1 2025	Auction	Type of auction	MW available	MW awarded	Allocation rate	Policy mechanism	Strike price
Germany	N-9.4 (non-central)	Specific	1,000	1,000	100%	Feed-in-Premium with negative bidding option	N/A
H2 2025	Auction	Type of auction	MW available	MW awarded	Allocation rate	Policy mechanism	Strike price
France	A07 - Oléron 1	Specific	1,200	-	-	Contract-for-Difference	-
France	A08 - Centre Manche 2	Specific	1,600	-	-	Contract-for-Difference	-
France	A09 - Golfe de Fos 2 floating	Specific	500	-	-	Contract-for-Difference	-
France	A09 - Narbonnaise 2 floating	Specific	500	-	-	Contract-for-Difference	-
France	A09 - Brittany South 2 floating	Specific	500	-	-	Contract-for-Difference	-
France	A09 - Oléron 2	Specific	1,000	-	-	Contract-for-Difference	-
Germany	N-10.1 (central)	Specific	2,000	0	0%	Negative bidding	N/A
Germany	N-10.2 (central)	Specific	500	0	0%	Negative bidding	N/A
Ireland	Tonn Nua	Specific	900	-	-	Contract-for-Difference	-
Lithuania	Second offshore auction	Specific	700	-	-	Contract-for-Difference	-
Netherlands	Nederwiek Zuid I-A	Specific	1,000	-	-	Negative bidding	N/A
Poland	2025 Offshore Round	Specific	4,000	-	-	Contract-for-Difference	-
UK	Allocation Round 7- Pot 3- bottom-fixed	Specific	TBA	-	-	Contract-for-Difference	-
UK	Allocation Round 7- Pot 4- floating	Specific	TBA	-	-	Contract-for-Difference	-

WindEurope is the voice of the wind industry, actively promoting wind power in Europe and worldwide. It has over 600+ members with headquarters in more than 35 countries, including the leading wind turbine manufacturers, component suppliers, research institutes, national wind energy associations, developers, contractors, electricity providers, financial institutions, insurance companies and consultants. This combined strength makes WindEurope Europe's largest and most powerful wind energy network.



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