

SUMMIT ON THE GEOPOLITICS OF THE TRANSITION IN A MULTIPOLAR WORLD

OFFICIAL REPORT



DISCLAIMER

The views and perspectives presented in this report reflect the discussions and exchanges that took place during the Summit on the Geopolitics of the Green Transition in a Multipolar World. They do not represent the official positions or opinions of the Global Wind Energy Council (GWEC), the Global Renewables Alliance (GRA), or any of their partners and affiliates. The content is intended to provide a summary of the key themes and insights shared during the summit and should not be interpreted as an endorsement of any particular viewpoint.



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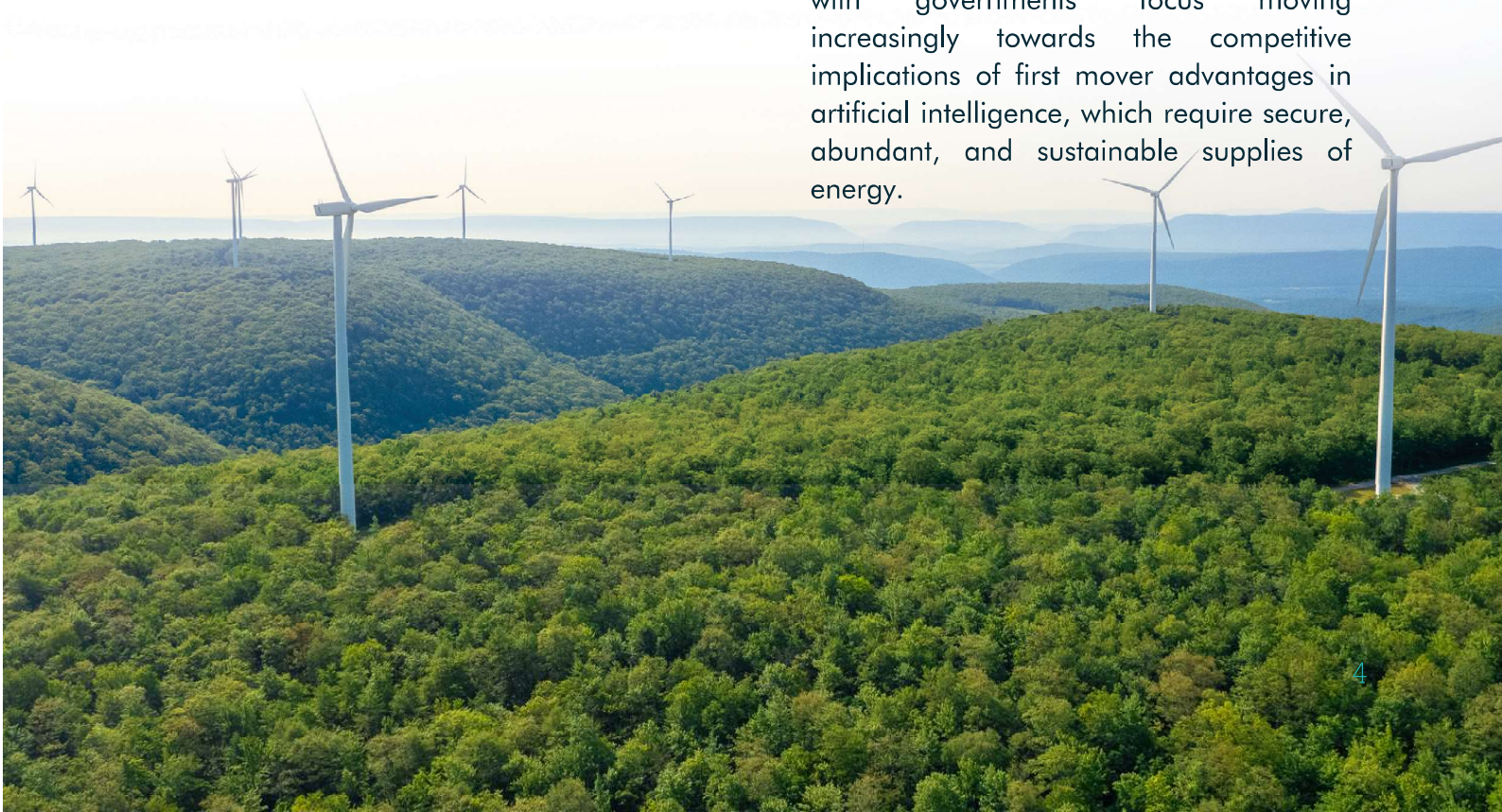
EXECUTIVE SUMMARY

We are living through truly exceptional times. Ever-accelerating technological advancements in both the digital and energy sectors are not only reshaping our economies and societies but also redefining the struggle for global hegemony in the 21st century. As the world enters the period known as mid-transition, when renewable energy technologies still compete with fossil fuels, the convergence of great power competition and rapid technological innovation is transforming how policymakers approach energy policy.

Green energy policies are no longer perceived as the exclusive domain of economics and sustainability. Within the traditional energy trilemma of security, affordability, and sustainability, security is emerging as an increasingly central concern that is poised to remain at the centre of energy policymaking for years to come.

There is value in exploring how the wind power industry can adapt its public narratives and government engagement strategies to successfully navigate the growing focus on energy security, while working to preserve multi-lateral frameworks for cooperation in the areas of climate and energy. The GWEC Summit on the Geopolitics of the Transition in a Multipolar World was convened with these goals in mind.

This report will summarize the summit's discussions, present its key findings, and outline a series of next steps to help position the energy of the future with the politics of the present. The Summit revolved around examining the conceptual frameworks that underpin energy geopolitics, from a starting point that it should not be reduced to a zero-sum competition for control of scarce resources. In the mid-transition, geopolitics offers a lens to understand the global race to influence the development of the techno-industrial systems of the future, with governments' focus moving increasingly towards the competitive implications of first mover advantages in artificial intelligence, which require secure, abundant, and sustainable supplies of energy.



Within this framework, current debates surrounding energy geopolitics were considered by the experts at the Summit to be overly focused on the control of strategic resources, such as critical minerals, rather than on powering the new technologies and systems built upon them. In this regard, the task ahead for renewable energy sectors should be to shift the global conversation on the geopolitics of energy in this direction.

This would require a change of strategy in the way the wind power industry interacts with governments, international institutions, the public and other industries. The recommendations in the final sections of this report are grounded in two key conceptual frameworks that shaped the conversations at the Summit:

Driving new forms of multilateral collaboration

Wind, other renewable industries and investors should come together to help create regional “coalitions of the willing” with governments, energy-intensive industries, and civil society groups to address the bottlenecks slowing the transition. These efforts should go hand in hand with global industry initiatives to reform multilateral frameworks and processes such as COP/UNFCCC. This will help ensure that these organizations continue to drive government support and investment frameworks to accelerate the energy transition, especially for developing countries, and enable cross-regional standard-setting.

Position wind as a driver of prosperity and security in national contexts

Wind power should be presented as a driver of security, prosperity and wealth creation. Leading firms, global industry associations and their regional partners should adopt such perspective in its media and government engagement, showcasing practical solutions to the security challenges of a global industry in an increasingly interconnected world. Similarly, it is important for industry leaders to emphasize new ways of engaging in day-to-day politics and adapt its message to local cultural political and cultural environments.



| CONTEXT AND INTRODUCTION

A MOMENT OF INCREASED CONTRADICTIONS, AND CAUTIOUS OPTIMISM

According to industry leaders at the Summit, the wind and renewables sector assumed it was winning for too long, sometimes underestimating the need to engage more actively in both power politics and local political environments. The results of this can be summarized in two recent developments:

- We're witnessing record deployment of renewables, but, at the same time, record emissions, record fossil fuel use and record harmful impacts.
- Today, net zero pledges are being politicized, and are often portrayed as elitist or out of touch with the real needs of local populations, within the context of populist, anti-climate narratives.

The societal consensus that has sustained policy support for the transition since Glasgow and the adoption of Net Zero targets is increasingly fragile in a broad range of countries. Fossil fuels are far from being phased out, and the renewables industries should stay alert and continue to adapt its narratives and government engagement strategies proactively.

Despite setbacks, sector representatives shared that the industry's confidence in its capacity to power the transition remains high. Wind and solar manufacturing itself is already using renewables, and there is increasing adoption in both heavy industry and transport sectors. There is capacity to replace, not just add to, fossil energy.

The recent pushback is, therefore, just a reality check, rather than a strategic setback. The industry should seize the moment to develop a strong, assertive narrative that positions wind power as a key pillar of a prosperous future for countries at all stages of development, while addressing, national, political and societal goals and interests, in a more systematic way. The debates and discussions that featured throughout the Summit revolved around this practical imperative.

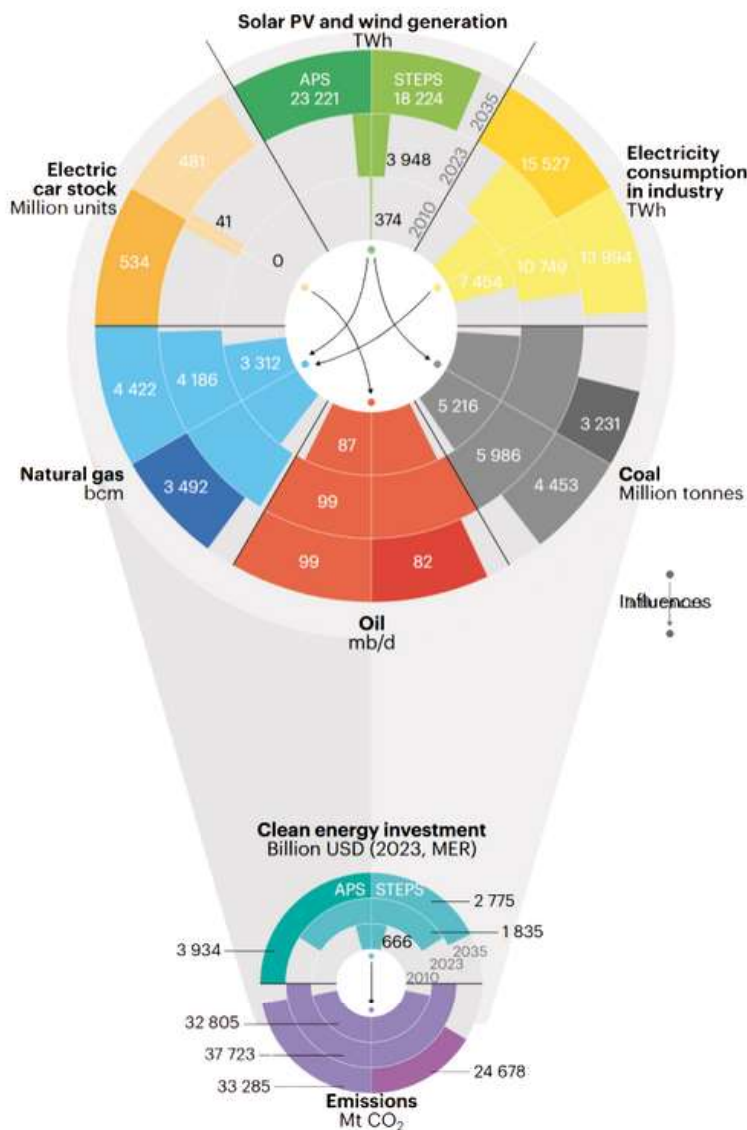
THE COMPLEXITY OF THE MID-TRANSITION

The current moment can be described as the "mid-transition". It can be understood as the period when green technologies have yet to dominate energy systems, despite already dominating new power installations, and must still compete with oil and gas for market share and political influence.

This phase of the unfolding history of energy systems is shaped by a diverse landscape of energy configurations that leverage the specific resources available at a local level, instead of a single hegemonic source dominating energy systems globally.

- This paradigm led some experts at the Summit to suggest that oil, gas, and other fossil fuels could continue to play a relevant transitory role in certain key markets.
- Similarly, a relevant share of experts questioned whether some countries may need to rely, strategically and temporarily, on fossil fuels to enable the accelerated deployment of renewables during the transition.

The good news is that, even though fossil fuel and renewable industries are still in a competitive struggle for markets and influence, the evidence and growth prospects favours renewables, both in terms of affordability and security. Those present in the Summit agreed that:



'CLEAN TECHNOLOGIES ARE RE-SHAPING THE GLOBAL ENERGY MIX'
SOURCE: IEA

- Renewables are winning on speed of deployment, cost, growth rates, and accessibility, even though they still have not been able to challenge the fossil fuel based political economies of some developing countries.
- Renewables constitute a national power asset that, once installed and operational, reduces a country's vulnerability to external trade shocks, provided the appropriate security protocols are in place.
- Innovation in the fields of electrification and storage are depleting the last remaining market niches for the fossil fuel industry, including in heavy manufacturing and international transport.
- Another area where renewables hold an advantage is physical security, especially in conflict zones like Ukraine, where large, centralized assets are easier to destroy while distributed renewables have proven to be more resilient.

THE ROLE OF GEOPOLITICS AND ENERGY SECURITY IN SHIFTING THE DIRECTION OF THE MID-TRANSITION

The leading political scientists that spoke at the Summit underscored that this crucial moment in the history of energy systems is coinciding with a profoundly unstable geopolitical moment. According to them, we are living through a hegemonic transition; one of those dangerous historical periods when ascending and declining hegemons reach power parity, putting the institutions that underpin the global order into question.

The hegemonic transition is leading to rising unpredictability and instability in global affairs. This is pushing policymakers to review the priorities of their energy policies on the basis of three major policy shifts highlighted by experts during the discussions:

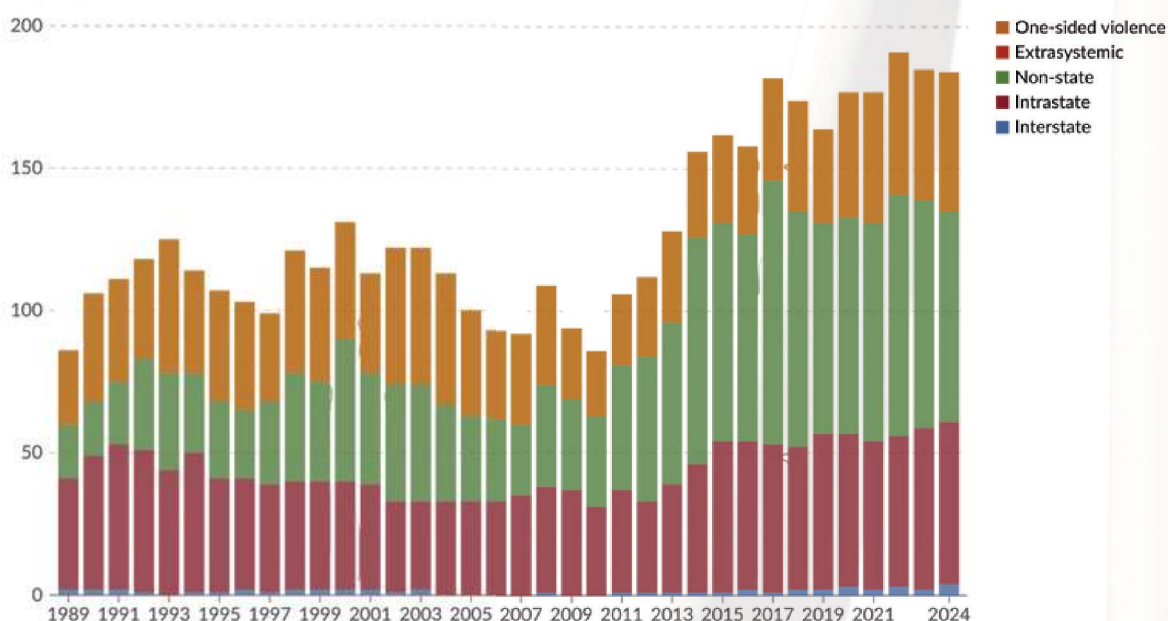
- Using clean energy to boost domestic economic development and manufacturing.
- Achieving autonomy from foreign energy dependence.
- Reducing overexposure to fossil fuels or specific renewable sources by diversifying energy portfolios.

In other words, in the energy trilemma (security, sustainability, affordability), energy security has become a common denominator and foremost policy focus for a large section of governments.

- The conversations on this topic concluded that the challenge ahead for renewables is to frame this convergence around security in a way that balances the need to increase the resilience of energy systems, with the imperative of accelerating the transition.

Number of armed conflicts, World

Included are interstate¹, intrastate², extrasystemic³, non-state⁴ conflicts, and one-sided violence⁵ that were ongoing that year.



Data source: Uppsala Conflict Data Program (2025); Natural Earth (2022)

OurWorldinData.org/war-and-peace | CC BY

Note: Some conflicts affect several regions. The sum across all regions can therefore be higher than the global number.

| GEOPOLITICS OF THE MID TRANSITION

GEOPOLITICS: A LIMITED BUT USEFUL FRAMEWORK TO UNDERSTAND THE TRANSITION

A significant portion of the Summit's discussions focused on deconstructing the concept of geopolitics and assessing its relevance for accelerating the energy transition.

Geopolitics as a framework is not free from shortcomings when it comes to understanding the new, international and interdependent forces that underpin the global energy transition.

- The field of geopolitics tends to understand energy systems as a competition for the exclusive control of strategic energy resources, such as oil, gas or critical minerals.
- Today's challenge, by contrast, is no longer about controlling a resource or a market, but about creating the architecture that enables the production of value from energy systems that exploit inexhaustible and universally accessible resources, such as wind and solar.

Nevertheless, those present at the Summit agreed that the lens guiding policymakers in the energy transition is increasingly geopolitical, particularly in developed countries. The reason being that, due to rising geopolitical instability, the focus of the management of the economic forces behind the transition has shifted:

- While in the past the allocation of strategic processes in global supply chains took pace under the principle of comparative advantage, policy makers now tend to prioritize strategic advantage, driven by concerns over resilience, dependency, power projection, and national security.

The challenge for the industry is to define, develop and popularize a new understanding of energy geopolitics, one based on exploiting the benefits of interdependence while managing its vulnerabilities.

- In this sense, geopolitics can be a useful tool to support the expansion renewable energy systems during the mid-transition.

However, participants also remarked that, once the transition is complete and renewables become widespread, a moment that we could call post-transition, the democratization of affordable energy access globally should diminish the value of geopolitics as a framework of understating energy markets.

Geopolitics is, therefore, a useful, but incomplete and time-bound tool to understand the forces underpinning the transition.

FROM INDUSTRIES TO SYSTEMS, THE OVERLAPPING FORCES OF ENERGY AND HEGEMONIC TRANSITIONS

The main reason why our geopolitical landscape cannot be ignored by the industry is its role in undermining the multilateral arrangements that once aimed to guarantee the global pursuit of the transition.

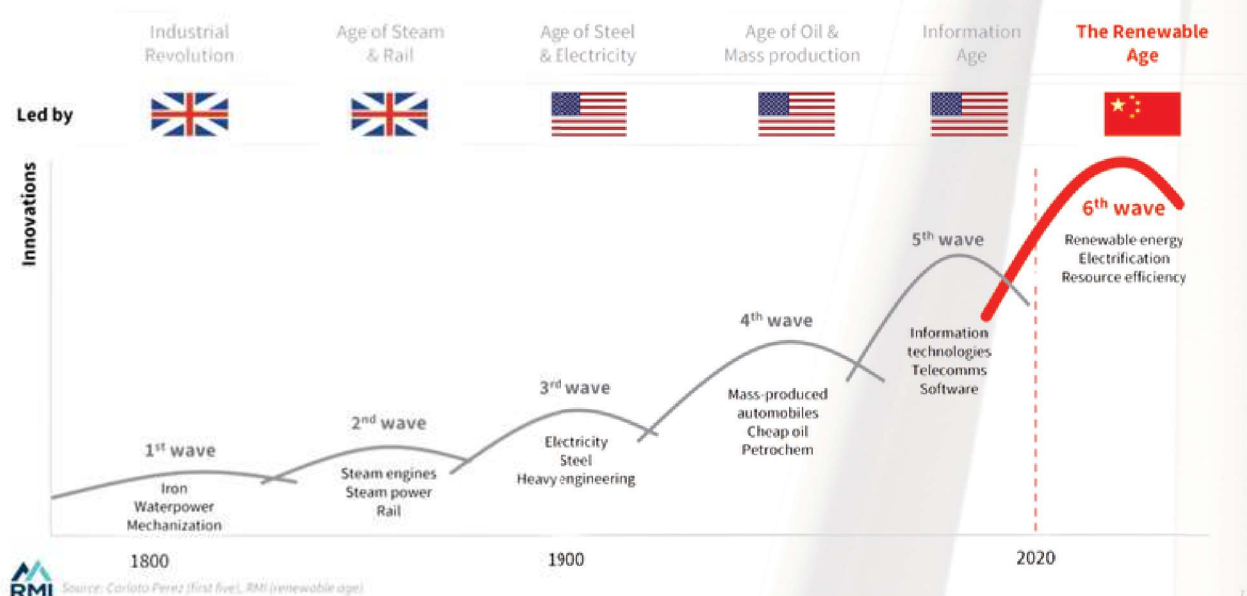
- We live in a multipolar world of emerging and competing blocs, where the old multilateral institutions, from the WTO and the IMF to the UN, no longer play a determining role in international affairs.

This competitive geopolitical landscape coincides with two major global energy trends that continue to gain traction across regions:

- Increasing electrification, digitalization, and decentralization of the energy system.
- The shift in the global energy mix towards dominance by renewables.

As an example:

- The first energy and hegemonic transition was driven by the synergies between coal and the steam engine, powering the Industrial Revolution and establishing British global dominance over France and the gun-powder empires of Asia.
- The second transition centred on electricity and the assembly line, pioneered by innovators like Edison and Ford, fuelling the rise of the United States as the industrial leader of the 20th century over its British ally and Soviet rival.



Leading advances in energy technologies allows rising hegemons to redefine both the material conditions and the rules of global governance. In the never-ending struggle for global hegemony, therefore, geopolitical edge lies in system leadership, not resource control.

The geopolitics of the energy transition can, therefore, be understood as the study of the forces that underpin the race among great powers to establish the first truly successful techno-industrial systems of the future, which will predictably be shaped by the convergence of renewable energy and artificial intelligence.

Within this framework, the attendants at the Summit remarked that current debates surrounding the transition are overly focused on specific energy resources or industries rather than on the technologies and systems built upon them.

- Global efforts to advance the transition should shift from developing isolated industries to building fully integrated and functional technological ecosystems powered by renewable energy.

WEAPONIZED INTERDEPENDENCE AS A TOOL FOR GREAT POWER COMPETITION

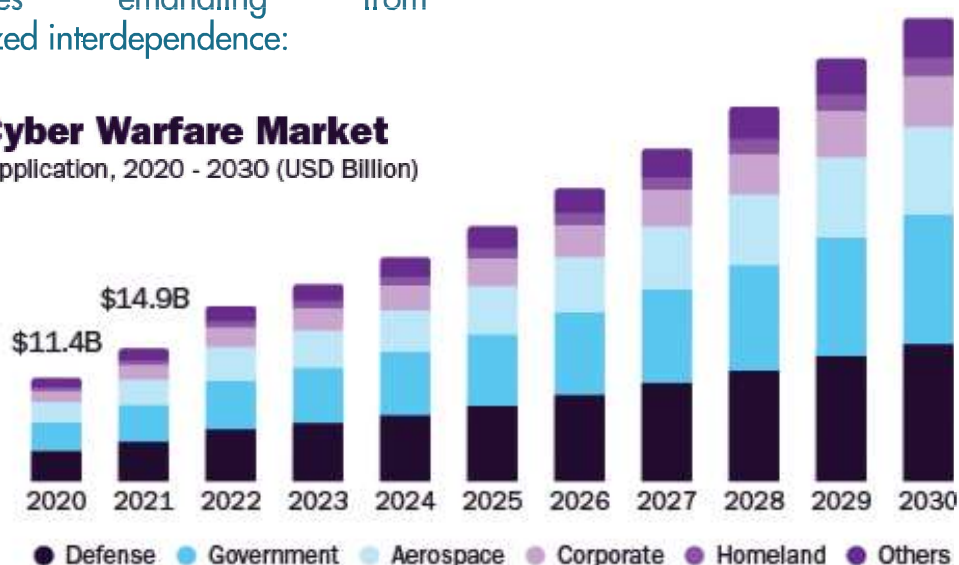
As expressed by the participants at the Summit, in this new system-based approach to great power competition, nothing determines global power hierarchies like the power projection capabilities emanating from weaponized interdependence:

- This has triggered pushback from other countries who are now seeking to weaponize interdependence in new and alternative global systems. China's massive cost reductions and capacity scaling in manufacturing of strategic assets, for example, has led to new security risks based on over dependence or asymmetric interdependence.
- The U.S. has used globally integrated technological systems like SWIFT, the internet or even AI as instruments of power and influence. Such systems create a great deal of dependence of foreign countries and companies on American assets and capabilities, providing the later with considerable strategic leverage over the former.

In our interdependent world, cybersecurity, value allocation, and control over supply chains are likely to become key battlegrounds in great power competition. The result is that economic policy making is no longer just about growth or cost reduction, but where you produce and how much value a given country or company can capture across the supply chain.

U.S. Cyber Warfare Market

Size, by Application, 2020 - 2030 (USD Billion)



'VALUATION OF THE CYBERWARFARE MARKET IN THE US'
SOURCE: [GRAND VIEW RESEARCH](#)

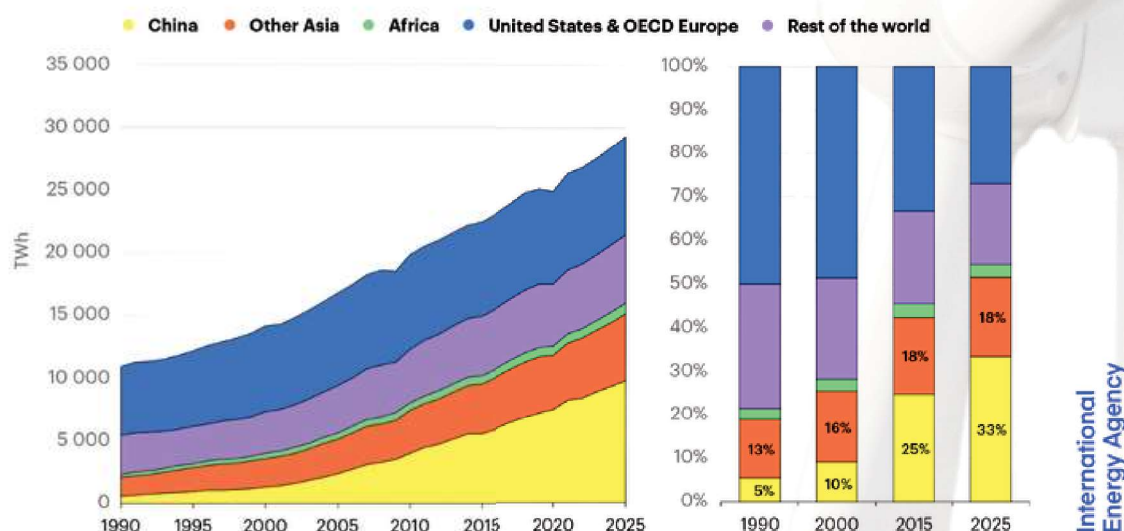
THE STRATEGIC IMPORTANCE OF GRIDS, TECHNOLOGY OWNERSHIP AND SUPPLY CHAINS

In this new framework of system leadership competition, the key geopolitical tensions in the field of green energy are those that enable the weaponization of asymmetric interdependent relationships; supply chains, infrastructure and technological leadership.

When it comes to the geopolitical value of energy infrastructure, the experts at the summit highlighted changes on the global transportation and supply of energy.

- Global economic relations are moving from a focus on trading energy commodities (like fossil fuels) to delivering secure and affordable electricity.
- The electrification of energy systems is pushing policymakers to reassess what constitutes strategic energy infrastructure, with interconnectors, grids, and storage therefore set to increase their strategic importance.

Evolution of global electricity demand by region (left) and regional shares (right), 1990-2025
Electricity Market Report 2023



When it comes to trade and supply chains, the core of energy trade is shifting from fuel and commodities to technology and components. Access to and affordability of clean technologies is likely to shape new global trade patterns and the distribution of value added across supply chains, making supply chain resilience, technology access, and cybersecurity central to the geopolitics of the energy transition.

- Attention on critical minerals is high but may only last to the medium-term as innovation and circularity could reduce dependency.

THE MAIN PLAYERS

THE US, A DECLINING HEGEMON WITH AN ANTIQUATED STRATEGY

Experts at the Summit remarked that, under the framework of energy security, there are tangible strategic advantages to countries deepening the transition, due to its potential to reduce their reliance on fossil fuel flows controlled by foreign countries or adversaries.

The current US administration, however, seems to be choosing a different path, using tariffs to boost LNG exports and oil and gas sectors. This could allow the US to establish relationships of economic dependence with import countries, while ensuring that the latter remain integrated in US dominated financial and economic infrastructure.

- However, LNG deals are faltering as key US allies such as South Korea, Japan, or India hesitate due to concerns over cost, effect in foreign currency reserves and dependency on an increasingly unpredictable partner.
- Developing countries tend to choose cheaper renewable energy assets over expensive and exposed LNG, allowing them to preserve their foreign currency reserves and reduce their long-term dependence on global trade flows.
- Most importantly, as highlighted by several participants at the Summit, in our increasingly multipolar context, none of the other major powers, the EU, China, India, or Brazil, are rich in fossil fuels. Unlike a bloc dominated by fossil-fuel exporters, they share interests in deepening energy collaboration to advance the transition.

The value proposition of Washington's LNG-centric international energy strategy is therefore, faulty, and likely to accelerate, instead of slow, the US hegemonic decline.



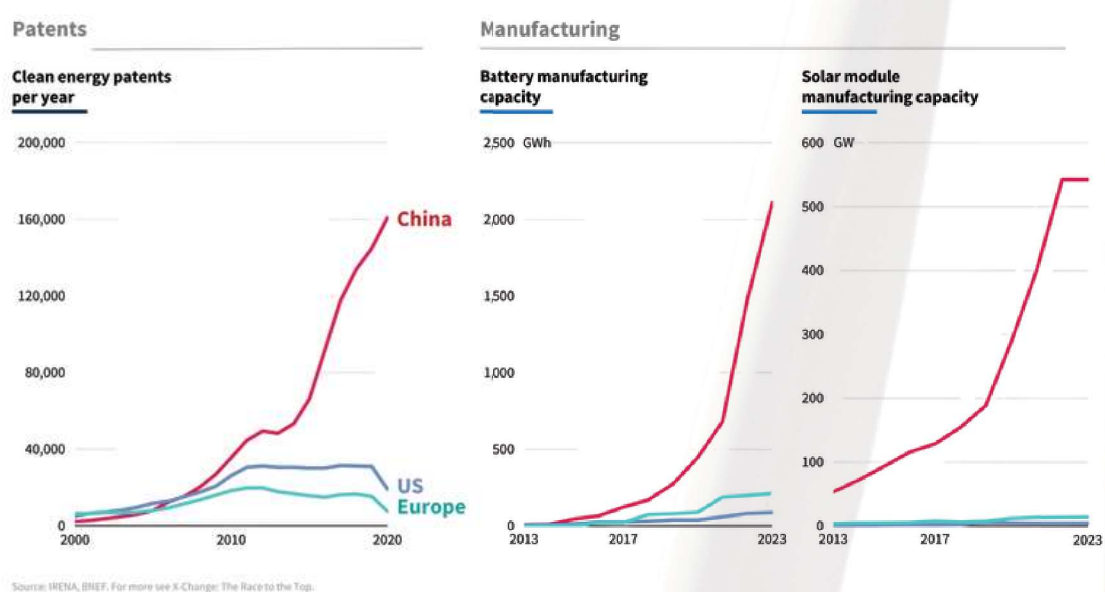
CHINA: PIONEER OF THE TECHNO-INDUSTRIAL LANDSCAPE OF THE FUTURE

The current hegemonic transition is shaped by China's rise as the first "electrostate", a nation approaching the development of the first fully functional techno-industrial system based on renewable energy.

In contrast to the US' reliance on outdated energy technologies, China's approach to economic statecraft reflects its ambition to dominate the techno-industrial landscape of the future based on renewables. According to the leading political scientists present at the Summit, this is Beijing's greatest advantage in its current competition with Washington for global hegemony.

China has pursued decades-long effective industrial policies to build a fully functional new techno-industrial system based on advancements in the fields of refining of critical minerals, EVs, renewable energy supply chains, electrification and grid integration:

- Beijing's success in innovating at the systemic level rests on the capacity to leverage and boost the unparalleled scale of its economy, while pursuing effective long-term economic development strategies targeting key sectors for the techno-industrial system of the future.
- The key to Chinese technological dominance in the industrial domain is a feedback loop of intense competition and innovation, under the guidance, support and protection of the central government's industrial development programs.
- Chinese industrial sectors are supported and protected during their early stages of development, while individual companies face one another in a fiercely competitive market, driven by the state's immense infrastructure development programs.
- This enables Chinese manufacturing industries to innovate from the outset with the support of government authorities, and to continue innovating in their maturity within one of the most intensely competitive markets in the world.



By contrast, the U.S. and EU have strong companies and industries but lack both the scale that drives Chinese innovation and their systemic cohesion. How the rest of the world engages with China, and how China, in turn, engages with them, in completing the global transition may be one of the defining historical questions of our time.

China's power projection capabilities are already being boosted by the aforementioned trends, as the country poses itself as the world's foremost provider of affordable clean energy and outbound foreign direct investment (FDI) in green technologies and value chains. According to the insights of industry representatives at the Summit:

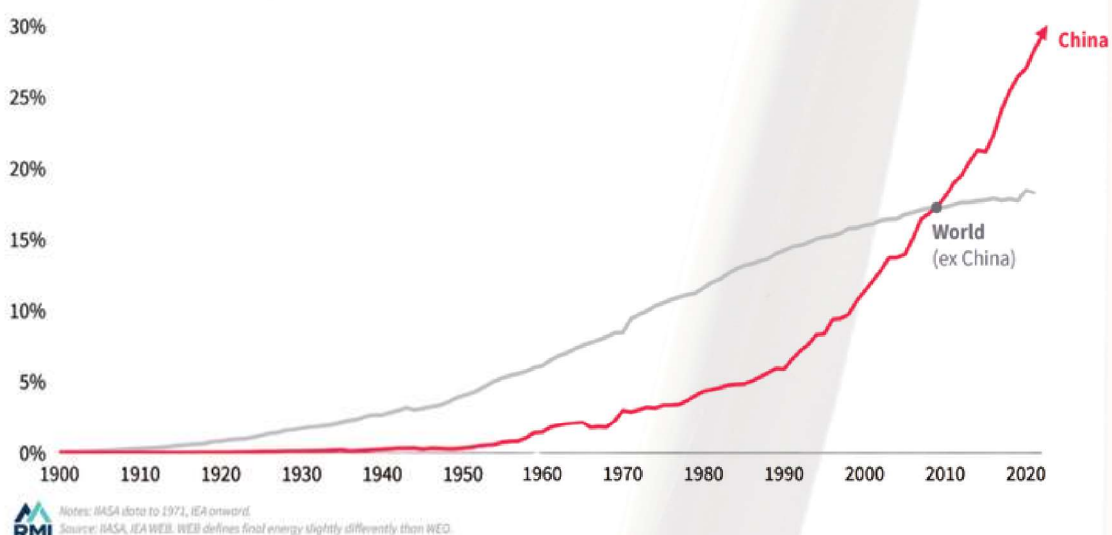
- Western OEMs and green manufacturing companies are largely withdrawing from Southeast Asia and other key developing regions, leaving increased space for Chinese actors in emerging markets.
- China is expanding its international influence in these regions through strategic acquisitions, while maintaining strict control and ownership over high value-added processes.
- This approach restricts the type of international technology transfers that once enabled China to launch its own domestic green industries, allowing Beijing to drive the global energy transition without diluting its technological leadership.

Just like their American competitors, this recently gained technological and economic leadership is allowing Beijing to influence international geopolitics by encouraging favourable policy shifts in rising markets. In this context, and as expressed by the representatives of China's direct neighbourhood in the Summit, there are real and significant strategic and ethical risks in over-reliance on China for green tech that cannot be ignored.

Experts at the Summit agreed that in the face of these challenges, solutions that should include, rather than exclude, China from global political and economic networks:

- U.S. semiconductor sanctions, for example, have been proven counterproductive, accelerating, instead of slowing China's domestic micro-chip production capabilities.
- Green supply chains are already insufficient to meet deployment goals even with China's participation, and without it, the resulting shortages would be critical.

Electricity share of final energy



PRACTICAL SOLUTIONS TO ADDRESS THESE CHALLENGES

Emulate Chinese Industrial Support Policy Programs with a Focus on Maintaining the Global Playing Field

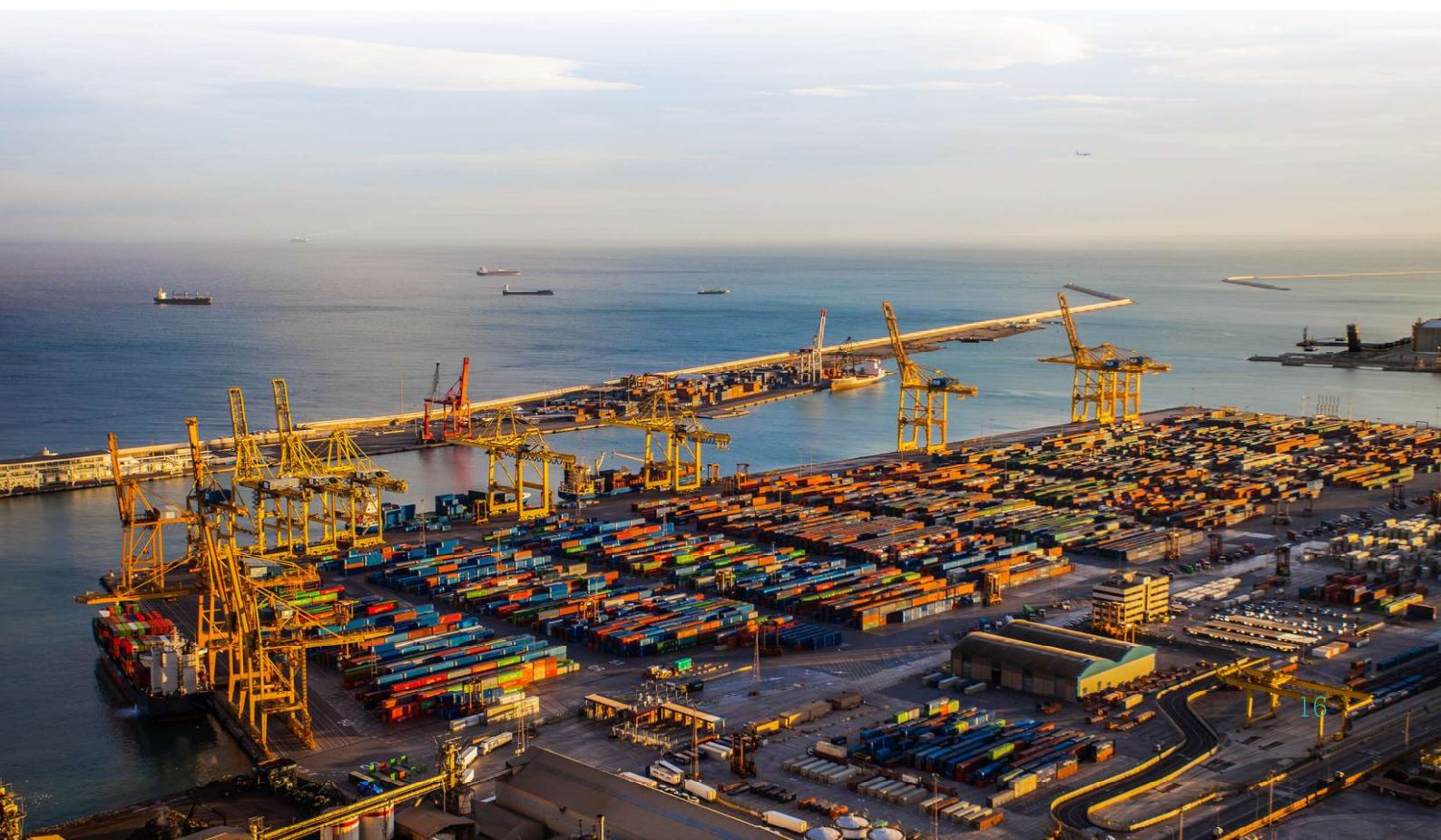
New models of mature, internationally coordinated and market-based national industrial policy that allow local manufacturing and logistics firms to compete toe to toe with its Chinese counterparts.

Pursue the Structural Reform of Energy Systems at the Regional Level

New models of international collaboration initiatives that allow to replicate at a regional level the scale of the system-wide reforms that catapulted China to the vanguard of the energy transition.

Sort out Supply Chain Security Vulnerabilities through Standard Setting Mechanisms

The creation of internally recognized and enforceable security standards for the design, manufacturing and installation of key components to address dependency concerns.



THE ROLE OF EMERGING COUNTRIES, THE TRANSITION MOVES SOUTH AND EAST

A fact of our time is that the future of the global economy, geopolitics and the transition is shifting from the Global North and West to the Global South and East.



¹ Calculated by weighting national GDP by each nation's geographic center of gravity; a line drawn from the center of the earth through the economic center of gravity locates it on the earth's surface. For detailed analysis, see the appendix in the McKinsey Global Institute (MGI) report *Urban world: Cities and the rise of the consuming class*.

Source: MGI analysis using data from Angus Maddison, University of Groningen; MGI Cityscope v2.0

In these countries, ambition in the transition remains high because developing a resilient, sustainable and efficient energy systems is vital to delivering on the developmental promise of prosperity made by local power-holders to local populations.

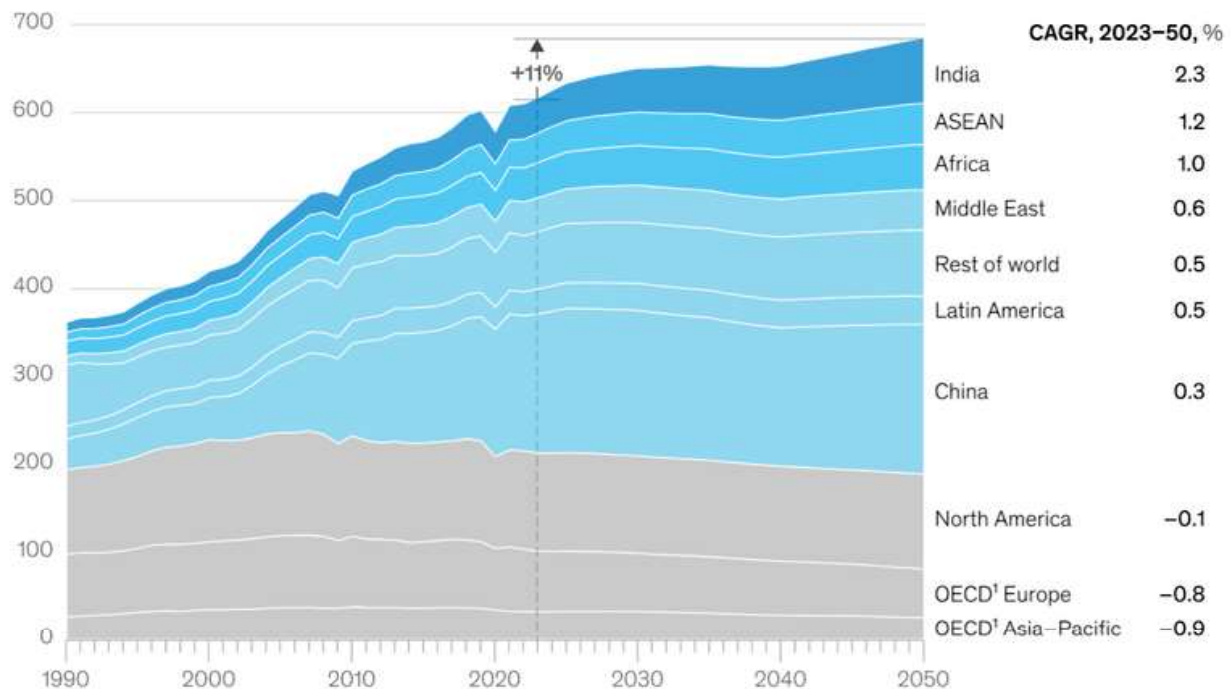
However, most economies in these geographies face severe implementation challenges linked with the instability of our geopolitical context: mainly weak grids, lack of regional interconnections and lacking or vulnerable supply chains, all linked to their increasingly limited access to clean energy financing.

- Green supply chains in emerging markets depend on robust, fair and open trade. Yet this foundation is being undermined by rising protectionism, fuelled by great power competition.
- The turn inward of the United States and other developed economies is adding to the risk of carbon leakage and uneven standards, while limiting the cross-regional interoperability and transfer of renewable energy components and technologies. This contributes to undermining the capacity of rising economies to develop local technical know-how and create the right market conditions to successfully drive their own transitions.
- Global financial flows are not yet structured to support climate goals. Both private and public finance face constraints, with the multilateral system under pressure and trust in institutions eroding. This jeopardises the development of the necessary infrastructure for the expansion of green energy systems, especially when it comes to the development of regional grid networks.

According to the regional experts present at the Summit, these challenges are leading some countries to turn to the exploitation of internationally and locally sourced fossil fuels, and dedicate increased attention to nuclear alongside the development of renewables.

The good news, however, is that the Global South and East are not giving up on their green targets. This leads to the pressing question that occupied the Summit: how is the international community going to help these countries follow a green development pathway?

Global total primary energy demand, Continued Momentum,
million TJ



¹The Organization for Economic Cooperation and Development.

| ENHANCED MULTILATERALISM

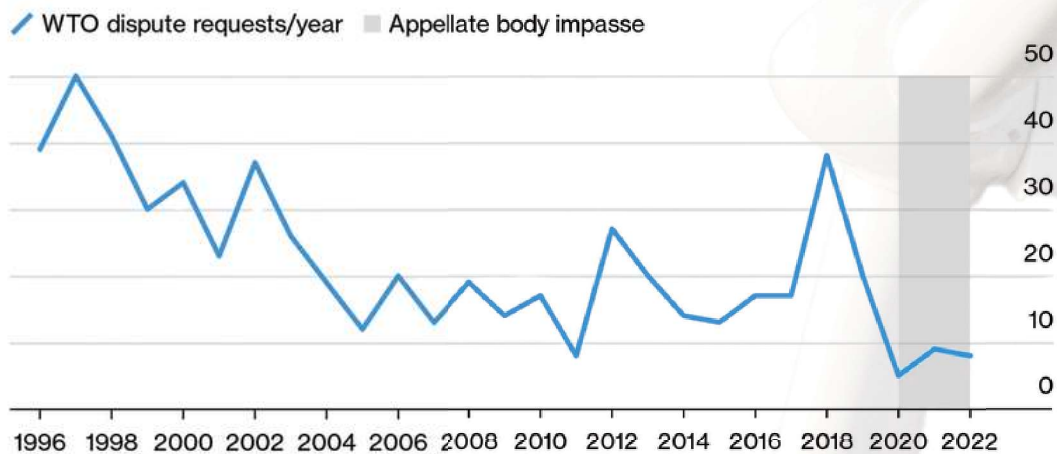
WITH MULTILATERALISM IN CRISIS, COALITIONS OF THE WILLING ARE EMERGING

According to the international relations experts at the Summit, the traditional multilateral system is not well prepared for the mounting geopolitical challenges we are going through, because these emanate precisely from the same global economic integration process that it attempts to manage.

To put it simply, the American withdrawal from the global order and the rising tensions with Beijing have made constructive, cooperative relations in multilateral settings increasingly difficult to achieve.

Declining Number of WTO Disputes

WTO appeals paralysis has meant a drop-off in trade disputes initiated



Source: World Trade Organization

Bloomberg

According to the industry leaders present at the Summit, this conundrum calls for new international efforts to update strategies, rebuild trust, and focus on facilitating ad hoc, practical cooperation on finance, supply chains, and infrastructure.

- Despite the challenges, they remarked the spirit of pragmatism and collaboration emerging from necessity that they experienced during their meetings with industry leaders and policy makers in rising economies.
- A successful reactivation of the international system will not just be about goodwill, though. It should take into account transaction costs and be adapted to local economic and political realities, which are often overlooked in multilateral climate diplomacy.
- Transmission infrastructure is expensive and requires a high level of international cooperation. MDBs are well equipped for both requirements but aren't adequately supporting grid development due to geopolitical frictions undermining their decision-making structures.
- Mobilizing finance should not be overcomplicated or rely solely on multilateral arrangements. In many cases, smart, targeted de-risking, adapted to local socio-economic forces is more effective than large-scale funding. Crucially, the former can be achieved through focused ad-hoc multistakeholder collaboration arrangements.

Internationally, the geopolitical challenges posed by great powers call for both renewed efforts to reform multilateralism and the creation of new "coalitions of the willing" for addressing specific challenges, such as the development of smart finance solutions for grid development.

Combining these two layers of international cooperation, New Partnerships and Updated Multilateralism, should also help mitigate the structural geopolitical and ethical risks of over-reliance on China for green technologies. They can achieve this through supply chain diversification and grid development initiatives at the regional level, while advancing large-scale finance and standard-setting through multilateral and cross-regional approaches. This is the nature of what could be referred to as "Enhanced Multilateralism".

NEW PARTNERSHIPS

The first component of this "Enhanced Multilateralism" pertains to ad-hoc collaboration initiatives at the regional level. The debates that took place during the Summit led to the conclusion that, while high-level diplomacy continues, regional coalitions of the willing and the working must step in to fill the gap left by multilateralism. The future of the energy transition depends on the success of these new regional groupings:

- Some experts recommended that there should be a focus shift from multilateralism to plurilateral, multi-stakeholder models that build effective coalitions among the private sector, governments, NGOs, media, and scientists, operating through a 'situation room' approach to co-design solutions.

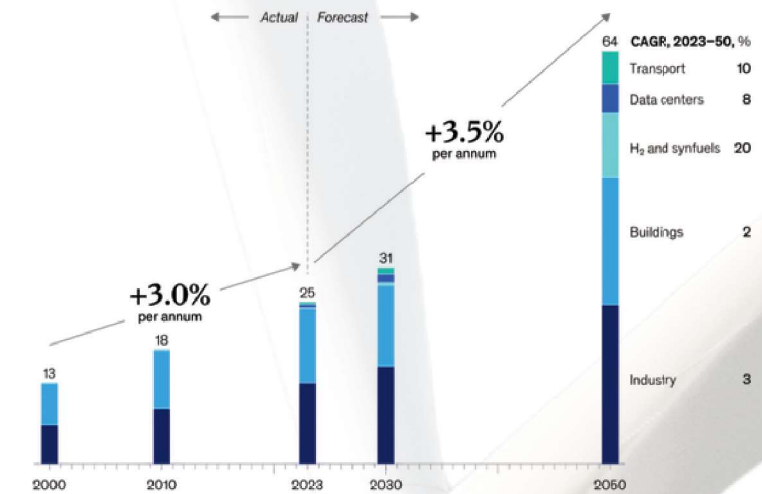
The industry's international diplomacy strategy should therefore aim for the creation of special-purpose alliances for energy cooperation, such as cross-border grid projects.

- Some leading experts at the Summit highlighted that these initiatives should similarly attempt to mobilize private sector demand to drive political change at the local level: foreign investors must increasingly demand renewable energy as a precondition for investment.
- This is especially relevant for AI development, data centre management, and microchip manufacturing, which are expected to drive rising energy demand in the coming years. The objective is to make sure that on-going global trends on electrification are boosted by the digitalization of both advanced and emerging economies.
- A final requirement is the management of and engagement with countries likely to lose out from the transition in the short term, such as Russia or Nigeria, as they may use their political capital to undermine or sabotage the transition process.

Multi-stakeholder Mini-lateral “coalitions of the willing” may serve the following functions related to maintain the playing field while creating economies of scale for resilient wind energy supply chains at the regional level:

- Strategic planning in clean energy supply chains.
- Jointly finance key regional infrastructure capabilities such as grid interconnectors.
- Targeted investment coordination: identify supply chain gaps, match them to countries with relevant industrial capacity, and facilitate public-private investments to fill them.
- Creating comprehensive regional frameworks across tech deployment, R&D, investment, and workforce development to guide industrial strategy and avoid fragility in energy transition efforts.

Global power consumption by sector, Continued Momentum, thousand TWh

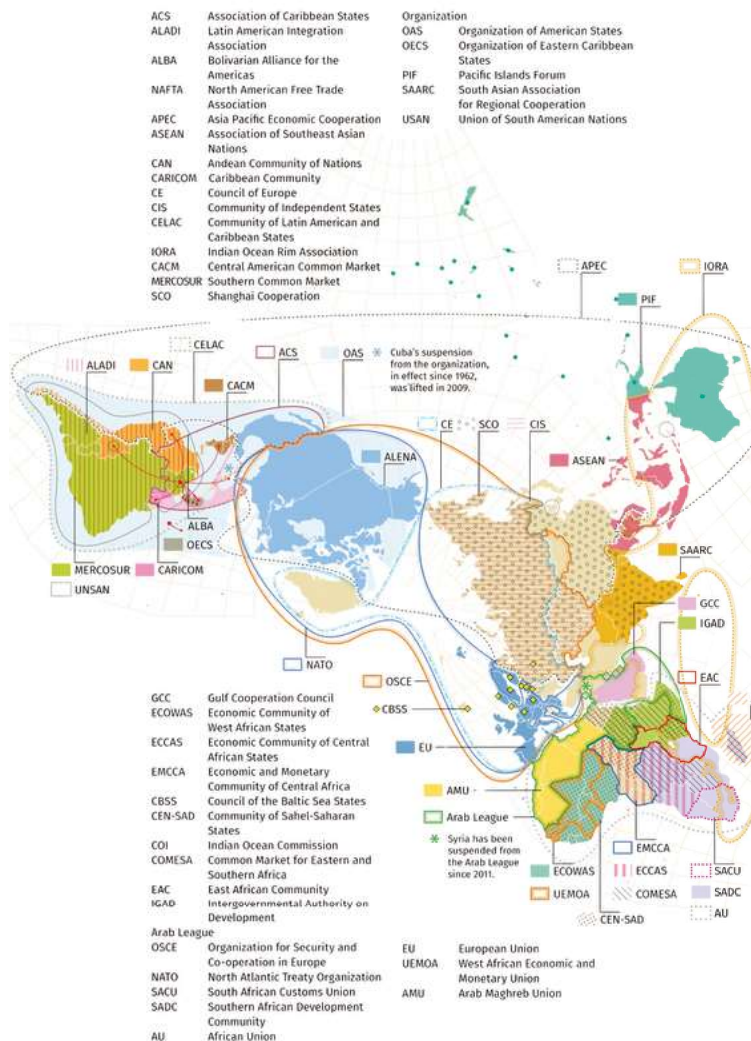


Source: IEA, IRENA

McKinsey & Company

In these new arrangements, the wind industry and its allies need to engage beyond energy ministries, especially with:

- Grid operators and infrastructure ministers.
- Regulators in strategically relevant policy fields including economic policy, international diplomacy and national security.
- Representatives of civil society.
- Leaders in energy intense industries with strong potential synergies with renewables and the electrification of energy systems.



UPDATING MULTILATERALISM TO ADVANCE THE TRANSITION

Despite the advantages that ad-hoc alliances may bring, multilateralism still has a key role to play in the transition as an integral part of the “New Internationalism”. As argued by several leading political scientists at the Summit, transition technologies must be resilient in the face of regional supply shocks, and the key to resilience in such cases may lie in interoperability across regional markets:

This should be built on the basis of shared standards, cross-border compatibility, and system-level connectivity, even in a fragmented geopolitical environment.

This is where new or reformed multilateral institutions could step in. They should continue to advocate and pursue the reforms needed for a globally regulated trade system based on shared minimum standards to preserve cross-regional interoperability, investment and trade.

Persisting spaces for successful multilateral cooperation may, therefore, include:

- Pooled Co-Investment initiatives to build green infrastructure in disadvantaged regions.
- Assessing and drafting global plans for the efficient supply of critical assets required for the clean transition.
- Institutionalizing multilateral investment vehicles, referencing the World Bank as a model of geopolitically balanced governance that can support the green transition.
- Identifying global manufacturing and raw material needs to direct cross-regional coordination efforts.
- Leading or guiding the development of component standardization, in a manner that addresses cybersecurity, dependence risks, and cross regional interoperability issues.



NATIONAL POLICIES AND NEW NARRATIVES

INTRO: OIL, GAS AND THEIR ROLE IN THE MULTIPOLAR ENERGY SYSTEM OF THE MID-TRANSITION

Beyond market or sectoral inefficiencies, one of the greatest external challenges to the energy transition remains the continued profitability of oil and gas businesses, which remains highly attractive to financial markets, local populations, and political elites.

- Fossil fuels provide "easy money" for governments, through royalties, foreign exchange and tax revenues, trapping many key players in the transition.
- Regional experts at the Summit highlighted that this is particularly true in oil-rich developing countries, where the argument for energy addition, rather than substitution, is often grounded in the need to prioritize poverty reduction, job creation, and access to healthcare.
- Similarly, experts noted that in the United States, the concept of "energy dominance", based on the addition and diversification of energy sources, rather than substitution, is gaining traction.
- As a result, these countries frequently adopt an "all of the above" strategy, leveraging both their fossil fuel reserves and their renewable energy potential.

AN INDUSTRY READY TO TAKE THE FIGHT TO LOCAL POLITICS

Industry leaders at the Summit remarked that the wind power industry should develop both new overarching narratives and political engagement strategies to undermine the support for the oil and gas industry in key markets.

Attendants at the Summit discussed how, in recent decades, the traditional environmentalist narrative has, at times, become counterproductive to the energy transition, rather than supporting it.

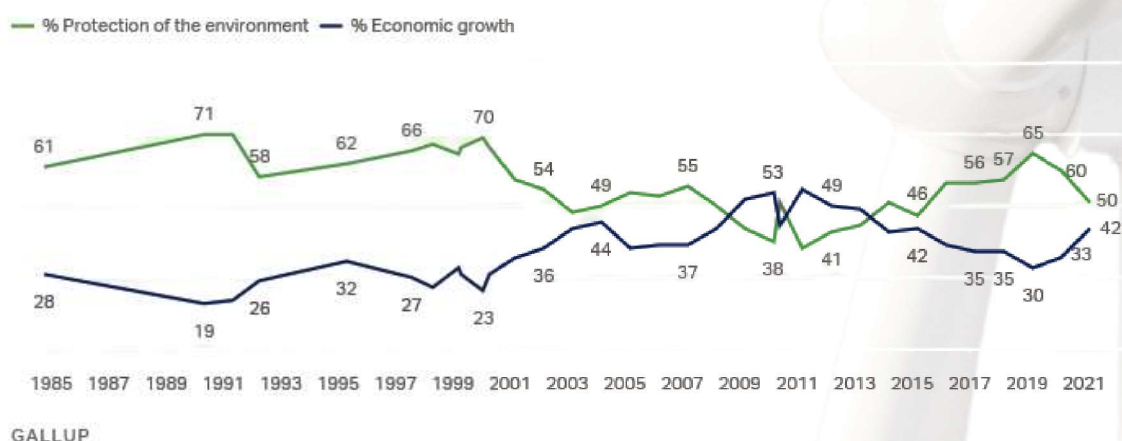
- It has contributed to an excess of environmental protection legislation, which in turn hampers the development of green projects and alienates both the public and the business community.
- It has often overlooked the interests of local populations, leading to public disengagement and even opposition.
- It has relied excessively on moral appeals that blame local populations, businesses or politicians to try to correct harmful practices.
- It has failed to challenge – or alternatively help transform - entrenched state-owned energy monopolies that dominate generation and distribution, structures that frequently serve political elites more than citizens.

In this regard, experts argued that the first step for the renewables sector should be to emphasize the current realities of local politics, community engagement and adapt its message to local sensitivities.

- On the one hand, this involves portraying the renewable energy sector as a pillar of economic and energy security, in addition to doubling down on environmental or moral arguments.
- On the other, renewables should expand and enhance their engagement with local communities to create a new social contract in both developed and developing countries that provides alternatives to fossil economic structures and revenue.

Environmental Protection vs. Economic Growth

With which one of these statements do you most agree — protection of the environment should be given priority, even at the risk of curbing economic growth (or) economic growth should be given priority, even if the environment suffers to some extent?



The above principles can serve as a starting point for the development of what some experts at the Summit referred to as a “new environmentalism”, adapted and prepared to shift global narratives in this era of energy. At its core, this new strategy relies on making the green alternatives to fossil fuels “irresistible” by showcasing renewable energy’s value proposition for consumers, governments, and investors.

According to them, the wind power industry must:

- Invest in institutional partnerships, regional alliances while engaging untraditional allies like finance ministries, sovereign wealth funds, and even oil & gas incumbents
- Anticipate pushback and tailor narratives to national interests and development goals framing renewables as tools for economic growth, industrialisation and energy security, not just climate action
- Engage and resist cultural resistance in some quarters of both developed and developing polities.

NEW NARRATIVES AND STRATEGIC PRIORITIES TO DEFEAT THE FORCES AGAINST THE TRANSITION

According to the experts at the Summit, the renewables sector needs to embrace a more pragmatic narrative to engage strategically in local and national power dynamics.

- The emerging new narratives reframe the transition as a net positive and enabler for progress in the livelihoods of local communities, positioning it within a broader political and economic struggle against harmful, unreliable and outdated oil and gas industries and their political allies.

The new narrative driving this shift is already visible among pro-transition political forces across continents. Experts at the Summit used the examples of President Xi in China, Prime Minister Modi in India or President Ruto's administration in Kenya. Their position can be summarized in the following points:

- Public support for the transition is in part based on the approach used by their respective leaders. Their approach is based on highlighting the broad societal value of renewable energy, framing it not only as a climate solution but as a driver of public health enhancement, economic prosperity, national power, and energy security.
- In these polities, the transition is conceptualized as a driver of abundance. The climate and the environment are seen as integral parts of economic policy, development and progress and drivers of energy security and sovereignty, instead of regulation, moral condemnation and restrictions.

Beyond intertwining the economic, security and environmental arguments, former policy makers at the Summit highlighted the specific prerequisites that renewables industries need to fulfil to become “irresistible” in the eyes of local populations and political elites. In this regard, the key to increase the political capital of the industry rests on the following priorities:

- Address intermittency concerns with built-in storage capability to address concerns arising from the capacity of renewable dominated grids to effectively respond in the face of blackouts or systemic failures.
- Invest advocacy resources in taking the industry's political fight to the local level to build social acceptance, while forming alliances with key stakeholders who have direct access to and influence over local populations and elites.
- Develop an external political strategy that prioritizes delivering economic benefits to local governments, offering mayors, policy makers and lawmakers tangible political wins.
- Ensure equitable burden-sharing and benefit distribution from the transition, along with long-term engagement with local communities, finding ways to compensate for declining taxpayer revenues resulting from the phase-out of oil and gas industries.
- Repurpose existing infrastructure to avoid abrupt transitions that disrupt or strain local economic life.

To conclude, the success of the transition will depend on the capacity of the industry to portray itself in a beneficial way with redefined economic, geopolitical, and environmental goals. The industry's advocacy strategy should ensure that the techno-industrial system of the future, fuelled the synergies between renewables, AI, and advanced manufacturing, is perceived as convenient, affordable, and an overall net positive for the public.

CONCLUSIONS. NAVIGATING THE GEOPOLITICAL LANDSCAPE OF THE MID-TRANSITION TOGETHER

Industry associations will play a key role in the development of a new narrative and political engagement strategy for the transition that is adapted to our geopolitical context, as well as the creation of the necessary regional and multilateral arrangements to support it.

They possess a series of key competitive advantages that individual companies or governments cannot replicate by themselves; the ability to build consensus around new public narratives, strong regional engagement capabilities and representative power in multilateral institutions

First, they are uniquely positioned to facilitate, manage and expedite dialogue and collaboration among key stakeholders with common goals across geographies. This allows them to craft effective narratives that reflect common interests and support the shared goal of making wind power a key part of the future industrial landscape.

- Increasing demand and strong policy support for the energy transition, embedded in broader systemic reforms to harness the capabilities of our emerging techno-industrial landscape, are prerequisites for the long-term success and growth of our industry.
- Creating and representing an industry wide consensus is particularly important when advocating for these systemic reforms, since the interests of specific players largely overlap with the overall goal of reforming the way economies are run and powered.

Industry associations also possess the resources and networking capabilities to engage with local policymakers in emerging economies, laying the groundwork for effective policy advocacy at both the local and regional level for players expanding in new markets.

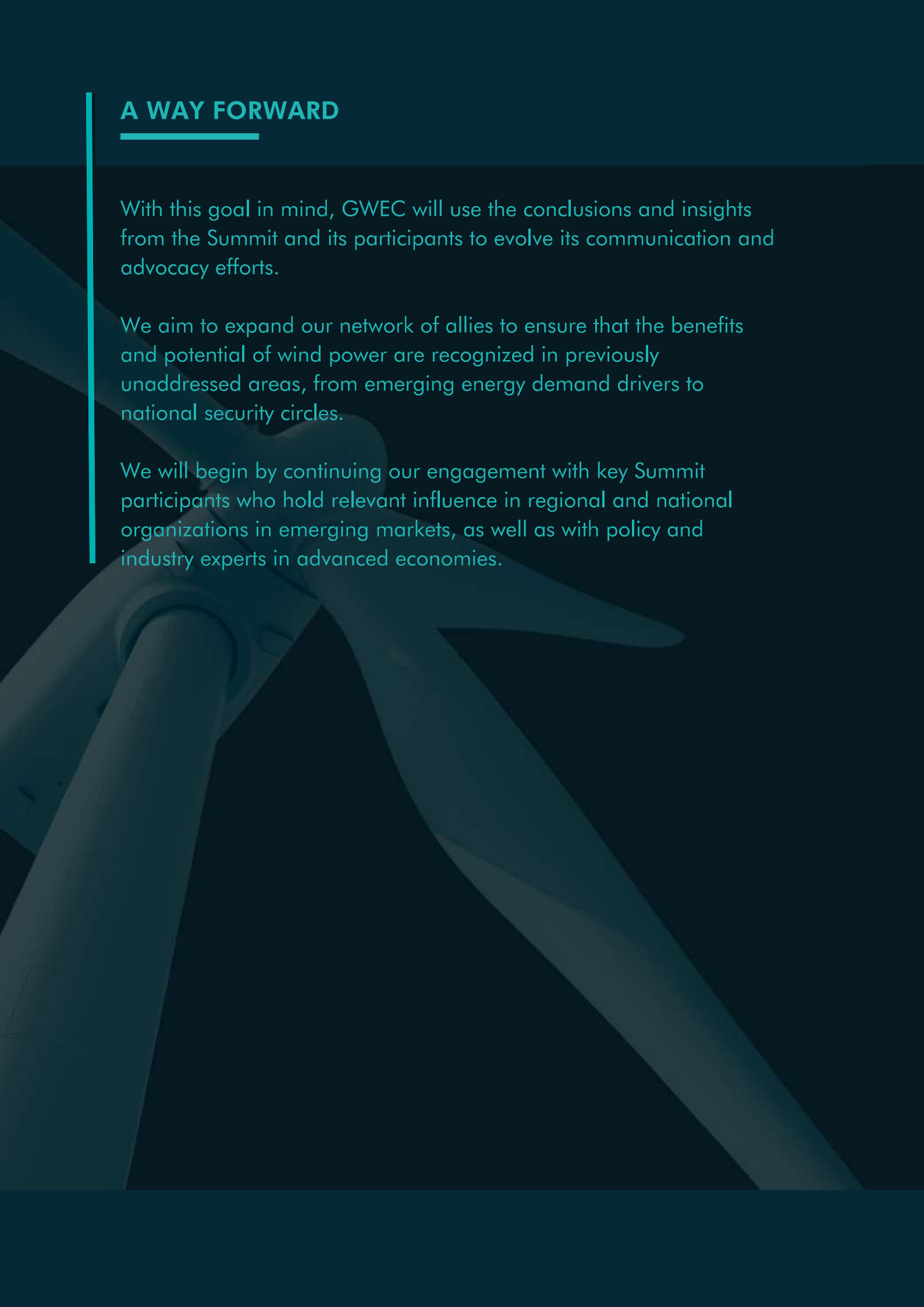
- They are well suited to initiate, or serve as the epicentre of, ad hoc “coalitions of the willing,” identifying critical bottlenecks hindering industry progress and leveraging their networks to mobilize political and economic actors capable of addressing those constraints.
- As the global order undergoes profound restructuring, the role of such ad-hoc alliances is only set to increase in importance, and with it the centrality of industry associations in advancing the energy transition in emerging markets.

Simultaneously, industry associations have the representative legitimacy to participate in the discussions surrounding the necessary structural reforms of multilateral institutions, supporting the former in its efforts to remain relevant in the face of hindering geopolitical tensions.

- As inter-governmental competition intensifies, industry representatives can play an increasingly important role in multilateral fora, showcasing global business interests that support global growth and shared prosperity in the face of obstructive tendencies driven by great power political competition.
- Industry associations are uniquely positioned to guide the creation of inter-industry security standards, component interoperability and the maintenance of inter-regional trade for key and scarce resources in multilateral fora.

To conclude, in a world of intensifying geopolitical instability and technological change, under pressure by the forces driving both the hegemonic and the energy transitions, the potential for both great prosperity and profound disruption is immense.

- Inaction, fragmentation, and competition among those driving the energy transition are not viable options.
- The industry must stand united, approach the task ahead with confidence, and articulate a clear, coordinated narrative and strategy.
- This is the central role, and historical responsibility, of GWEC and its partner industry associations.



A WAY FORWARD

With this goal in mind, GWEC will use the conclusions and insights from the Summit and its participants to evolve its communication and advocacy efforts.

We aim to expand our network of allies to ensure that the benefits and potential of wind power are recognized in previously unaddressed areas, from emerging energy demand drivers to national security circles.

We will begin by continuing our engagement with key Summit participants who hold relevant influence in regional and national organizations in emerging markets, as well as with policy and industry experts in advanced economies.

