

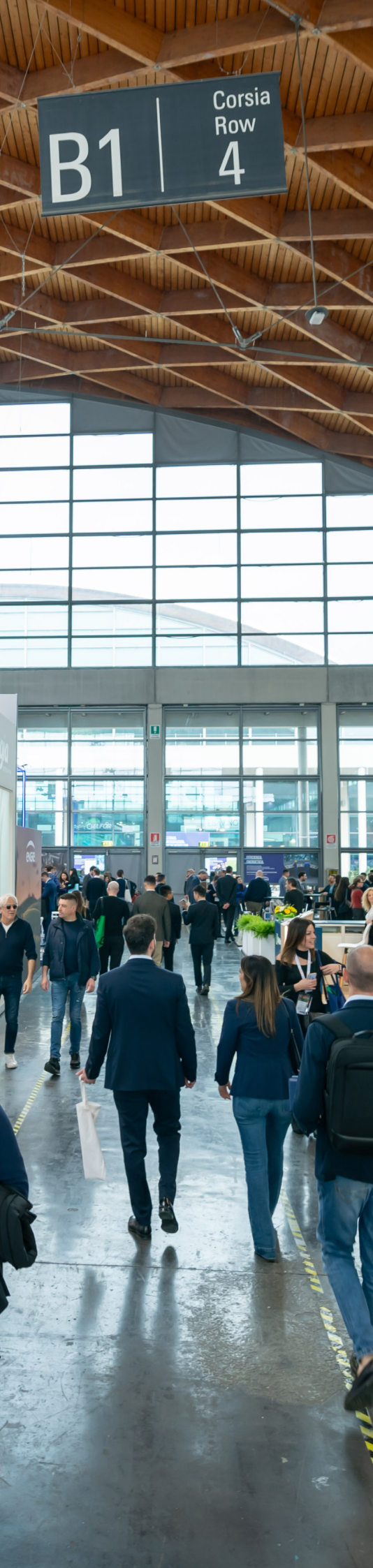


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Wind energy: the key to electrification

KEY, IEG's event dedicated to the energy transition, returns to Rimini from 10th to 12th March 2027 as Italy looks to accelerate wind deployment and strengthen its wider energy system. The wind-focused WEM area is set to expand, bringing onshore and offshore development, supply chains, ports and investment into the broader energy transition discussion.

Wind energy remains an important part of Italy's electrification strategy, both domestically and across the wider European and Mediterranean region. However, deployment is still running below the pace required to meet national and European targets.

According to the Italian National Wind Energy Association (ANEV), Italy installed 579.2 MW of new wind capacity in 2025, taking total installed capacity to around 13.1 GW. Germany had approximately 77.7 GW installed and Spain 33.2 GW in the same year, illustrating the gap between Italy and Europe's larger wind markets.

The challenge is not simply one of resource potential. Italy has a substantial pipeline of onshore and offshore projects, but planning, permitting, grid access and project economics all influence whether that pipeline can move into construction. ANEV has repeatedly warned that annual deployment needs to increase materially if the country is to remain aligned with its 2030 objectives.

From targets to delivery

One area showing increasing momentum is offshore wind. Following years of regulatory uncertainty, both floating and fixed-bottom projects are progressing through the authorisation process.

Italy's geography makes floating wind particularly relevant because deeper waters limit the suitability of conventional fixed foundations in many locations.

Offshore wind could make a meaningful contribution to Italy's longer-term decarbonisation ambitions, but progress will depend on more than project consent. Port capability, grid reinforcement, supply chain capacity, financing and a workable

remuneration framework will all affect the pace at which projects can move from development to construction.

FER X puts economics under scrutiny

That brings renewed attention to the FER X support framework. The definitive FER X decree signed in June 2026 provides for up to 37.15 GW of new renewable capacity. Of the capacity intended for competitive procedures, 16.5 GW is allocated to wind, 10 GW to solar PV, 0.63 GW to hydroelectric power and 0.02 GW to residual gas from treatment processes.

The headline allocation is significant, but the earlier transitional FER X auction highlighted the sensitivity of wind projects to price. In the first competitive round, approximately 940 MW of onshore wind was awarded from a 2.5 GW available allocation across 29 projects, at an average awarded price of around €72.85/MWh.

That result left a substantial proportion of the available wind capacity unallocated. For developers, the issue is whether future reference prices and auction conditions provide sufficient certainty to support construction while still maintaining competitive pressure. The answer will be central to whether the capacity identified under the definitive framework becomes operating generation rather than remaining part of the development pipeline.

The transitional auction also illustrates why installed-capacity targets cannot be considered in isolation. A project may have land, consent and grid prospects yet still fail to progress if the support mechanism does not produce a viable investment case. Conversely, stronger auction participation will place greater pressure on grid connections, construction capacity and equipment supply.



The policy challenge is therefore to create a framework in which each part of the delivery chain can develop at a compatible pace.

The coming years will therefore be critical. Italy needs to increase deployment while improving the connection between project development, grid planning, industrial capacity and investment. These are not isolated challenges, and they form part of the context in which KEY 2027 will take place.

Wind takes centre stage at KEY 2027

Wind energy will again be represented through WEM, Wind Expo for MED, at KEY – The Energy Transition Expo, organised by Italian Exhibition Group. The wind area is set to expand for the 2027 edition and will bring together participants from the onshore and offshore supply chains, including technology and component manufacturers, engineering service providers, project developers, investors and utilities.

For the wind sector, the value of that mix lies in connecting technology with the commercial and infrastructure questions that increasingly determine project delivery. Turbine and component development remains important, but so do grid access, financing, port capability, supply chain resilience and the ability to move consented projects into construction.

Closely linked to WEM is the growing focus on ports as hubs for the energy transition and the role of shore-side electrification in maritime decarbonisation. This theme will return through Su.port, Sustainable Ports for the

Energy Transition, which was launched in 2025. For offshore wind in particular, the relationship between ports, vessels, fabrication and project logistics is becoming increasingly important as project size and component dimensions grow.

A wider energy-transition context

KEY's cross-sector structure places wind alongside solar photovoltaics, hydrogen, energy efficiency, energy storage, electric mobility and smart, sustainable cities. That wider context is increasingly relevant because renewable generation cannot be considered separately from grid flexibility, storage, electrification and energy demand.

The conference programme, developed with KEY's Technical Scientific Committee, is intended to bring policy, market and technical issues into the same discussion. For wind companies, that creates a useful link between sector-specific questions and the wider energy system in which projects will operate.

The Innovation District will also return, providing space for start-ups and emerging technologies while maintaining a focus on skills. That is relevant to a wind industry facing simultaneous pressure to expand deployment, introduce new technology and secure the engineering and technical workforce needed to build and operate a larger fleet.

Building on the 2026 edition

KEY 2026 recorded a 10% increase in total attendance and a 9% rise in international

visitors. More than 1,000 exhibiting brands took part, including 320 international companies. The event also welcomed 530 hosted buyers and delegations from 59 countries.

Those figures underline the event's increasingly international reach, but the more important question for 2027 is how effectively that audience can address the practical barriers facing energy projects. Wind developers, manufacturers, EPC contractors, financial institutions and policymakers all approach the transition from different parts of the value chain, yet many of the obstacles to delivery sit between those groups rather than within any one of them.

From ambition to implementation

For wind, the central issue is increasingly implementation. Italy has renewable resources, a substantial project pipeline and a support framework intended to increase deployment. What matters now is whether permitting, auctions, grid development, finance and industrial capacity can work together quickly enough to turn that potential into operating assets.

KEY 2027 will provide a snapshot of how the industry is responding to that challenge. The expansion of WEM, together with the event's focus on energy infrastructure, ports, storage, finance and policy, reflects a market in which successful wind development depends on much more than turbine technology alone.

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