COP28 Tripling Renewable Capacity Pledge 2025: Update

Tracking countries' ambitions

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Abstract

Nearly 200 countries made major collective pledges on energy at the COP28 climate summit in Dubai with the aim of keeping the Paris Agreement target of limiting global warming to 1.5 °C within reach. For the first time, governments set key goals to help meet this objective, including tripling global renewable electricity capacity by the end of this decade. In June 2024, the IEA published COP28 Tripling Renewable Capacity Pledge: Tracking countries' ambitions and identifying policies to bridge the gap, which provided a global stocktake of renewable capacity plans to assess how NDCs reflected government ambition toward the tripling pledge.

This report is an update to the 2024 analysis with extended geographical coverage. It reviews all new NDCs submitted until the end of COP30 and quantifies renewable ambitions for 2030. It also examines updated national policies and plans for almost 200 countries from June 2024 to December 2025 to identify how national renewable capacity ambitions have changed since the last report. This analysis benchmarks renewable ambitions in new NDC submissions against national plans. The report also assesses how they both align with the tripling global renewable capacity by 2030 pledge.

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The report benefited from analysis, drafting and input from multiple colleagues. The lead authors of the report were, Yasmina Abdelilah, Vasilios Anatolitis-Pelka, Heymi Bahar, Marcus Bockhold, Piotr Bojek, Elif Cerezci, Laura Marí Martínez, Rafael Martínez Gordon and Hunor Papolczi, who also coordinated the production.

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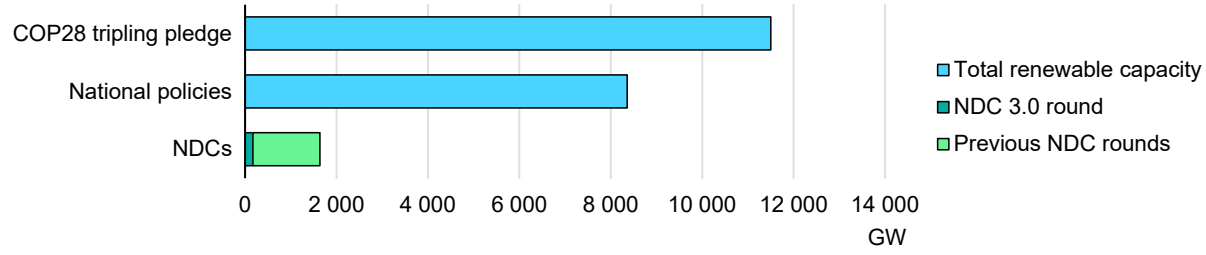
Key findings

This analysis updates renewable capacity ambitions in NDCs and national policies for almost 200 countries from the IEA's *COP28 Tripling Renewable Capacity Pledge* report published in June 2024. It tracks renewable ambitions for 2030 in all new NDCs submitted through the end of COP30 and benchmarks these against updated national policies and plans. The report also assesses how they both align with the tripling global renewable capacity by 2030 pledge.

New Nationally Determined Contributions (NDCs) show limited reflection of the pledge to triple global renewable capacity to at least 11 000 GW by 2030 agreed at COP28. However since then, only about two-thirds of NDCs have been updated (128) and fewer than half of these (53) explicitly reference the global tripling goal. Even fewer (32) contain quantifiable renewable capacity ambitions for 2030 – amounting to just 170 GW. Yet when including earlier NDCs submitted since 2015, the combined total reaches 1 635 GW, far below total renewable capacity installed globally today.

NDCs continue to under-represent current government plans for installed renewable capacity by 2030. In contrast, analysis of existing policies, plans and estimates for 189 countries correspond to reaching around 8 350 GW of renewable capacity in 2030 — five times the level reflected in NDCs. Emerging markets and developing economies account for two-thirds of this global renewable ambition. Solar PV remains the leading technology in 2030 renewables ambitions.

2030 renewable capacity ambition in NDCs, national plans and COP28 tripling pledge



Countries' overall renewable capacity ambitions from national policies and plans are 6% higher compared to last year's analysis. This change is based on new policy documents released from 101 countries. Among them, 51 countries raised their ambitions – accounting for an additional 840 GW. In contrast,

21 countries lowered their ambitions expecting to install 408 GW less renewable capacity. The remaining 29 countries released new policy documents but kept their 2030 ambitions unchanged.

Despite higher ambitions emerging from national policies, a significant ambition gap with the tripling pledge remains. The IEA's latest forecast for 2030 sees global renewables deployment exceeding national ambitions driven by rapid expansion of solar PV and wind by government plans and policies due to improving cost competitiveness against alternatives. However, this is not quite sufficient to reach the goal of tripling renewable energy capacity worldwide.

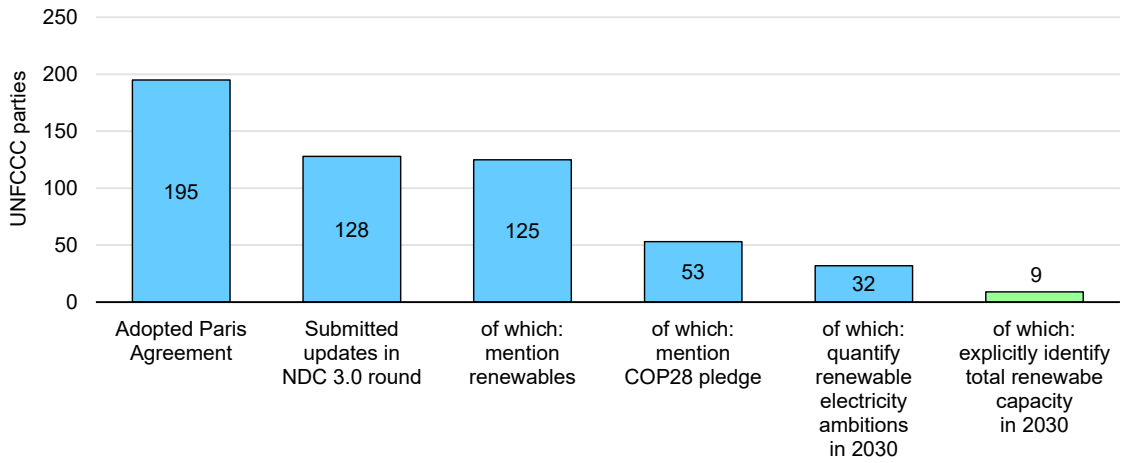
Chapter 1. Global ambition stocktaking and status

Nationally determined contributions

Renewables feature in nearly all new NDCs, but less than half mention the global tripling pledge and even fewer outline their 2030 ambitions

In November 2023 at the 28th Conference of the Parties (COP28), 195 parties agreed to triple global renewable power capacity by 2030 as part of the first Global Stocktake (GST1), also known as the "UAE Consensus". Parties were expected to consider the outcomes agreed at the first GST and raise their climate ambitions in the subsequent round of updated nationally determined contributions (NDCs), often referred to as round NDC 3.0, due by 10 February 2025. Although there was no formal requirement to include renewable energy ambitions in the NDC 3.0 round, doing so would help clarify how governments intend to contribute to the global efforts of tripling worldwide capacity by 2030.

Assessment of renewable capacity ambitions in NDCs submitted since January 2024

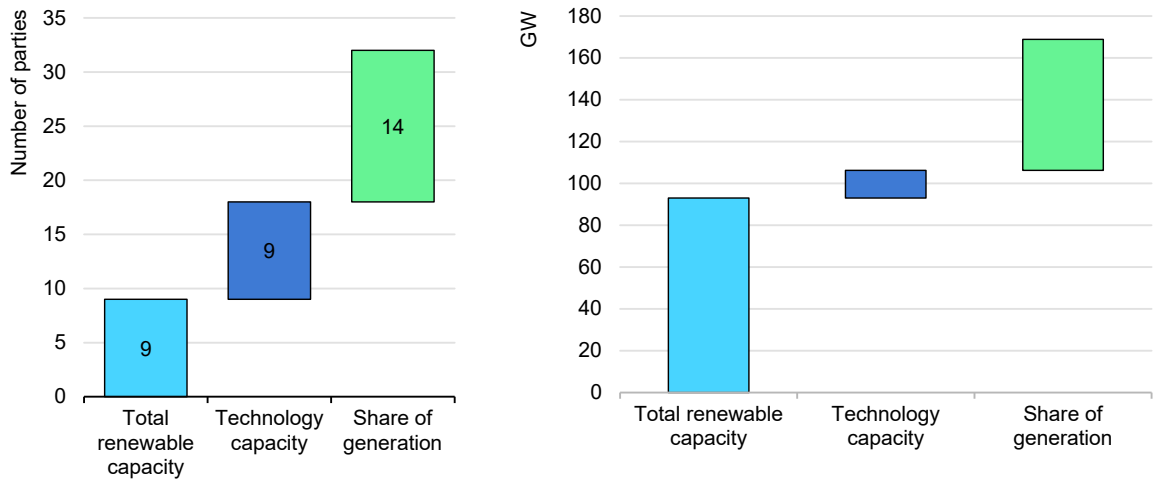


Notes: UNFCCC = United Nations Framework Convention on Climate Change. Of the 198 parties to the UNFCCC, 195 adopted the Paris Agreement. NDC 3.0 round refers to updates submitted between 1 January 2024 – 21 November 2025 for the purposes of this report.

A review of the United Nations Framework Convention on Climate Change (UNFCCC) NDC registry shows that 128 of the 195 parties that adopted the Paris Agreement submitted new or updated NDCs between 1 January 2024 and 21 November 2025, a period referred to in this report as the "NDC 3.0 round". Most submissions in this round cover the implementation period of 2031-35. However, eleven only cover the implementation period of 2025-30, a period addressed by most countries in their submissions during the NDC 2.0 round between 2020-21. For the purpose of assessing renewable energy ambitions, this review considers any NDC submitted after the first Global Stocktake as part of the NDC 3.0 round, regardless of whether it constitutes a party's second or third update or the period it covers.

Of the 128 submissions, renewable energy was mentioned in all but three (125) reflecting its role in lowering GHG emissions in government plans. However, less than half (53) referred to the COP28 renewable capacity tripling pledge and even fewer (32) contained quantifiable ambitions for renewable electricity in 2030. Among these, only nine included an explicit quantitative metric for "total renewable capacity by 2030". The combined 2030 ambition of these nine parties amounts to 93 GW, led by Uzbekistan, the United Arab Emirates, Ethiopia, and Morocco which together account for around 80% of the total.

Renewable energy ambitions for 2030 communicated in the NDC 3.0 round by number of parties and indicator type (left) and corresponding capacity (right)



Notes: Several parties communicated ambitions for multiple metrics or years; if a party submitted multiple quantifiable 2030 renewable ambitions, it is classified under the categories in the following order in priority: total capacity, technology capacity, and share of renewables in total power generation. Net additions to installed capacity are included under technology capacity. Estimates for renewable capacity implied by generation-share ambitions are based on demand growth from the Electricity Mid-Year Update 2025 and historical capacity factors.

However other 2030 ambitions were identified beyond “total renewable capacity”. Nine countries, most notably Kyrgyzstan, also provided ambitions only for specific technologies (i.e. solar or wind), totalling a further 13 GW of renewable capacity. In addition, another 63 GW can be estimated from the 14 parties that expressed renewable ambitions only as a share of total electricity generation. Together, these three metrics bring the total renewable capacity ambition identified for 2030 to almost 170 GW across 32 NDCs submitted during the NDC 3.0 round.

An additional thirty-two countries expressed their 2030 renewable electricity ambitions in the new NDCs using metrics that require a more detailed assessment. Some set targets based on the share of installed capacity or the share of renewables in final energy. The majority were the 27 EU member states and the European Union, which gave their 2030 ambition in share of renewables in total final gross energy consumption. Other parties set ambitions for later years, mostly 2035, in line with the cycle’s emissions-reduction timeframe. These included major pledges, such as that of the People’s Republic of China (hereafter, China) for 3 600 GW of solar PV and wind capacity by 2035. Two parties looked even further ahead, setting ambitions only for 2040 or 2050. Converting these metrics into 2030 capacity values would require additional country-level assumptions that are beyond the scope of this analysis.

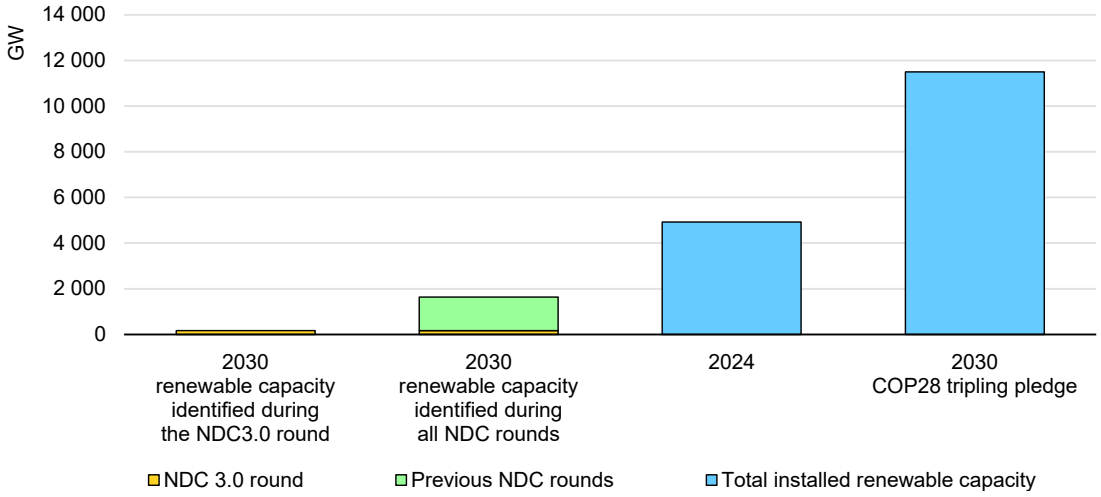
Global renewable ambitions for 2030 in NDCs are significantly higher when previous NDC rounds are included but still fall short of global tripling pledge

The NDC 3.0 round does not fully capture all countries’ 2030 renewable capacity ambitions for two main reasons. First, not all countries have submitted updated NDCs during the 3.0 round, and some may still have valid 2030 renewable energy targets outlined in their earlier NDCs. Second, since the NDC 3.0 round introduces a new target year of 2035, some countries may have set goals only for that year, while their 2030 targets remain reflected in NDCs submitted in previous rounds. Our analysis therefore seeks to include these cases to ensure a comprehensive assessment of 2030 renewable capacity ambitions.

Including 2030 ambitions from previous NDC cycles, total renewable capacity pledges could exceed 1 600 GW, almost ten times what is captured in the current round of submissions (170 GW). Previous NDC submissions (prior to 1 January 2024) contain approximately an additional 1 500 GW of 2030 ambitions from 45 parties, largely driven by technology-specific ambitions. China’s pledge from the NDC 2.0 round to install 1 200 GW of solar PV and wind by 2030 represents the largest contribution, with further sizeable commitments from countries such as Mexico (40 GW) and Iraq (12 GW), and others that used renewable-generation shares, such as Costa Rica (100%), Pakistan (60%) and Egypt (42%).

Renewable ambitions in all NDCs represent only 14% of the capacity needed to meet the COP28 tripling pledge. This level is even below today's installed renewable capacity, suggesting that current NDC targets are unlikely to reflect governments' true ambitions. Further commitments may still emerge as more NDC submissions are released in the coming months, but many major Parties have already submitted updated NDCs without quantifiable 2030 renewable capacity targets, making it difficult to assess their contributions to the global tripling pledge.

Renewable capacity ambitions for 2030 identified in NDCs versus current installed capacity in 2024 and the 2030 COP28 tripling pledge



Notes: "2030 ambition" here refer to renewable capacity for 2030 that was identified from one of the following three metrics: total renewable capacity, technology capacity, or the share of renewables in total generation. Other metrics or time frames are not included. The NDC 3.0 round in this chart refers to all NDCs submitted between 1 January 2024 and 21 November 2025. If a party submitted an updated NDC during this round but did not specify a quantified 2030 renewable-energy ambition, the most recent previous NDC containing such an ambition was used.

National renewable capacity ambitions

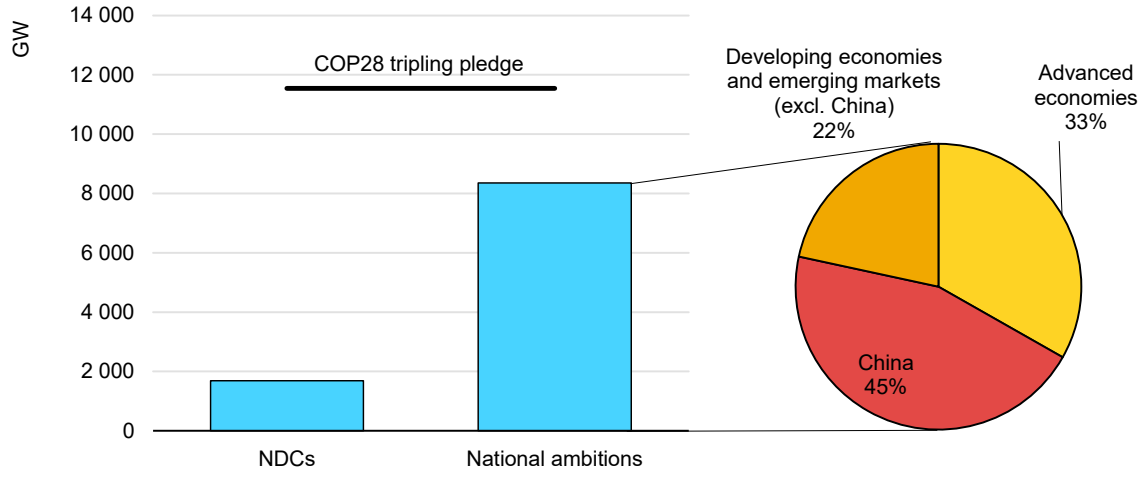
Government ambitions and plans for renewables significantly exceed what is in existing NDCs but fall short of global tripling pledge

Based on analysis of 189 countries' national policies, plans and modelling updates, governments' ambitions for renewable power capacity amount to 8 355 GW globally by 2030. Emerging economies and developing countries account for two-thirds of global ambitions, led by China, while advanced economies account for the remaining one-third.

These national ambitions are more than five times the level in current NDCs but still not in line with the goal of tripling global renewable capacity by 2030, underscoring the ambition gap. The IEA's 2024 report COP28 Tripling Renewable

Capacity Pledge highlighted this significant gap and the opportunity for countries to reflect their national ambitions in upcoming NDC updates. Nonetheless, countries continue to announce more explicit renewable capacity ambitions in their national policies than those communicated in their updated NDCs, including the latest submissions until the end of COP30 on 21 November 2025.

Global renewable capacity ambitions to 2030 in NDCs and national ambitions (left) and the share of national ambitions by regions (right)

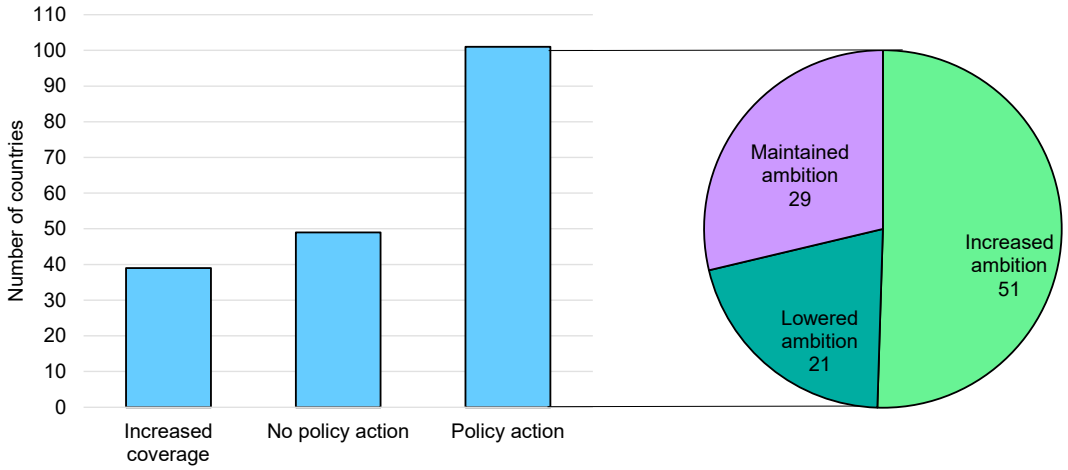


Note: NDCs includes submissions from all NDC rounds expressed as installed capacity or power generation share.

One hundred-plus countries took policy action over the last year, with half increasing their renewable ambitions

Since the previous report in June 2024, 101 countries took policy action by releasing new documents regarding renewable ambition in 2030. Half, 51 countries, have raised their ambitions for 2030, signalling growing national commitments to accelerate renewable deployment. Conversely, twenty-one countries reduced their ambitions due to changing policy priorities or electricity demand projections that were lower than expected, while 29 countries maintained the same level of ambition in the new documents released. On the contrary, 49 countries did not release any new policy documents related to renewable electricity. This update also expands the country coverage from last year including 39 additional countries, reaching 189 in total.

Number of countries taking policy action between June 2024 and the end of COP30 (left) and the impact of policy action on global renewable capacity ambitions (right)



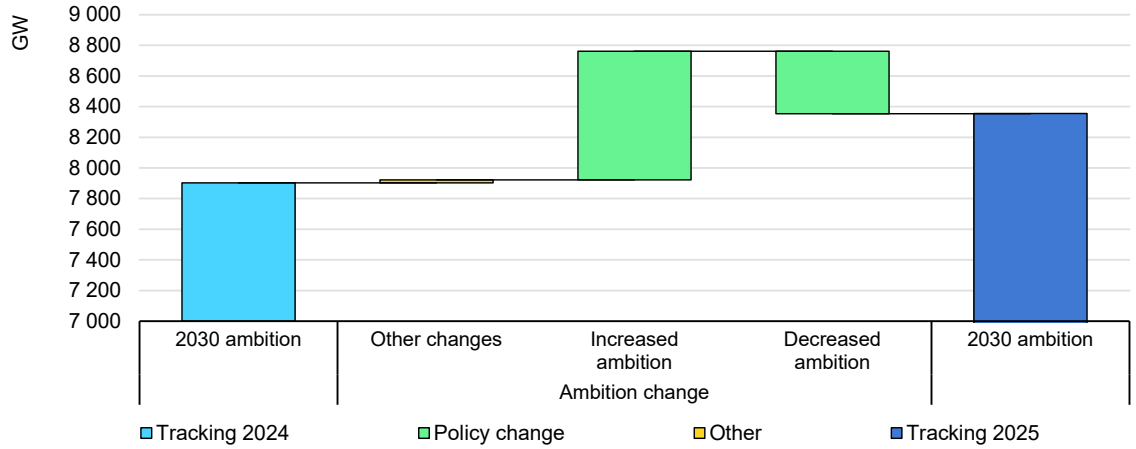
Note: "Policy action" refers to countries that have released a new policy document since the previous assessment in June 2024. "No policy action" refers to countries that have not released any new policy document since the last assessment, regardless of whether they had previously set an ambition. "Increased coverage" refers to an expansion in the number of countries included in this assessment.

Global ambition has increased, but the impact of policy changes varies across countries

Global renewable capacity ambitions for 2030 have increased by 6% (+453 GW) since last year, reaching 8 355 GW. This net increase reflects both upward and downward revisions, as well as increased coverage, and baseline and methodological updates.

- **Increased ambition in policy:** 840 GW, reflecting raised policy ambitions for renewable capacity in newly released documents.
- **Decreased ambition in policy**: -408 GW, reflecting reduced plans and ambitions due to policy changes over the last year.
- **Other changes**: 20 GW, includes the expanded country coverage (additional 39 countries), changes to the baseline for countries without a stated ambition (from 2022 to 2024), as well as adjustments to the methodology.

Global renewable electricity capacity ambitions by 2030 by revision type



Note: "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition). "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions. "Other" includes changes due to additional capacity from 46 countries that were newly added to the assessment, change in the baseline to existing installed capacity in countries without stated ambitions as well as adjustments to the methodologies used to calculate ambition.

Sources: Policy sources available in the online Annex: Tracking 2025 Sources.

China's upward revision and the Americas' downward revision shape global ambition change but mask changes across regions

China's upward ambition change is the largest among all countries and regions, with its renewable capacity ambition for 2030 almost 600 GW higher compared to last year's analysis. This increase is based on estimates considering recent policy announcements and modelling updates that incorporate deployment and cost reduction trends to reach China's carbon neutrality goal by 2060, announced in 2020.

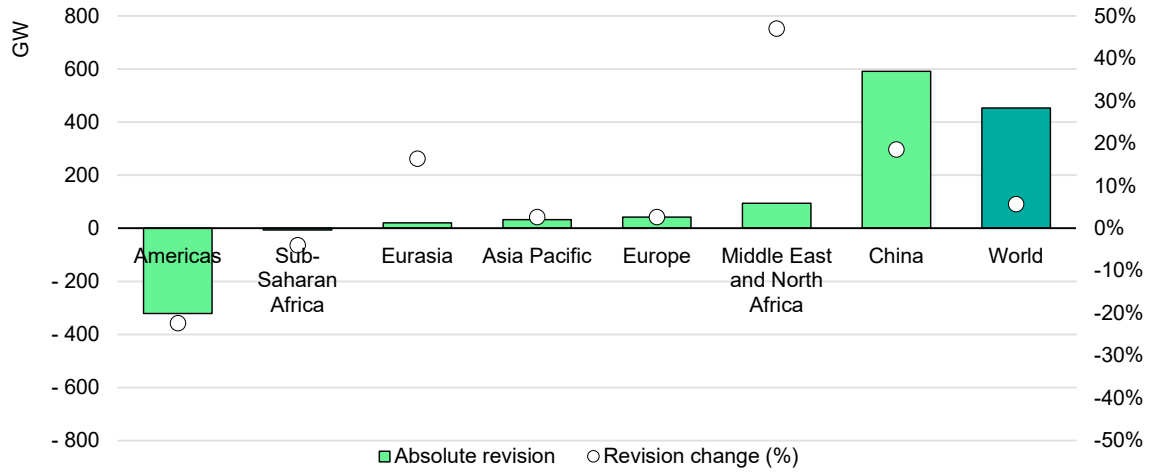
In contrast, countries in the Americas show ambitions that are lower by around 350 GW. The main driver is the United States' revocation in January 2025 of Executive Order 14008 from 2021, which aimed for 100% clean electricity by 2035.

The Middle East and North Africa region recorded the second-highest upward revision in ambition and the highest in percentage terms, rising by almost 50% compared with last year's assessment. Saudi Arabia had the largest upward revision of 70 GW, more than doubling its 2030 ambition in its first Biennial Transparency Report to support the Saudi Green Initiative's goals of economic diversification and emissions reduction.

Europe and the Asia Pacific region (excluding China) exhibit limited change in ambition compared with the previous year, each recording a 3% increase. In Europe, around half of this change stems from EU member states that finalised

their National Energy and Climate Plans, replacing the draft submissions. The remainder is largely attributable to the United Kingdom's update of its energy and climate policy.

Revision of renewable capacity ambitions by region



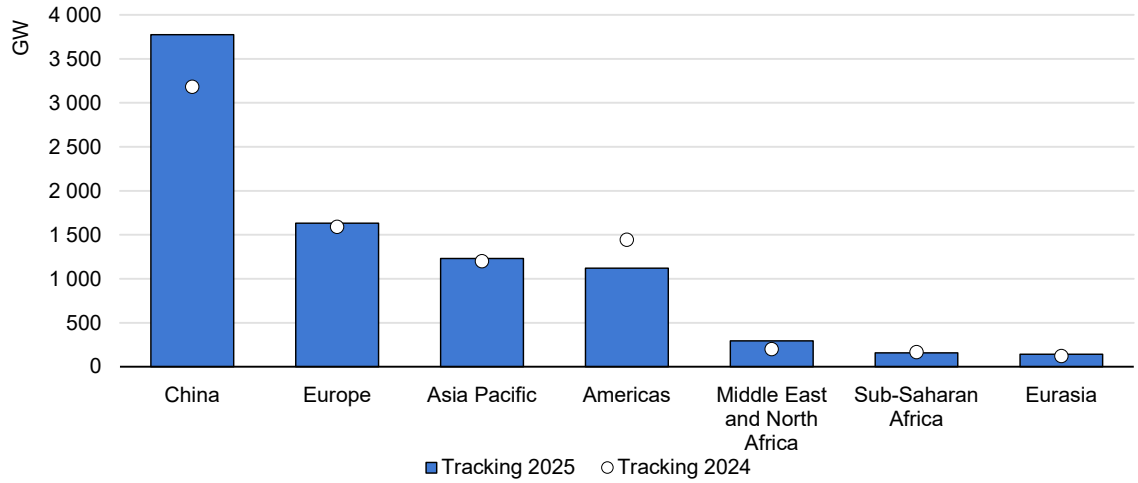
Note: The Americas includes North America, Central America, South America and the Caribbean.

In the Asia Pacific region (excluding China), the ambition levels of the largest economies – India and Japan – remain unchanged. Even so, upward revisions driven by new governmental strategies and updated modelling in Australia, Cambodia, New Zealand and Viet Nam offset the downward adjustments resulting from revised data in Indonesia and reduced deployment plans in Pakistan and the Philippines.

In Eurasia, countries' aggregated ambition is 16% higher compared with last year's assessment. One-third of this upward revision is driven by policy changes in Albania, Azerbaijan and the Kyrgyzstan. In sub-Saharan Africa, countries' 2030 ambitions declined slightly from last year, although this masks contrasting trends. While several countries raised their ambitions and new countries were added into this year's assessment, significant downward revisions – mainly linked to lower hydropower expectations in Ethiopia and Nigeria – drove the overall decrease.

China's estimated renewable capacity ambition for 2030 is the largest globally, representing about 45% of the total. Europe follows as the second-largest region, driven mainly by strong climate policies across the European Union and the United Kingdom. Due to lower ambition in the Americas, the Asia Pacific region now ranks third, despite limited policy changes in its major economies. Collectively, these three regions account for roughly 80% of global renewable capacity ambition.

Renewable capacity ambitions by 2030 by region



Note: The Americas includes North America, Central America, South America and the Caribbean. "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition). "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions.

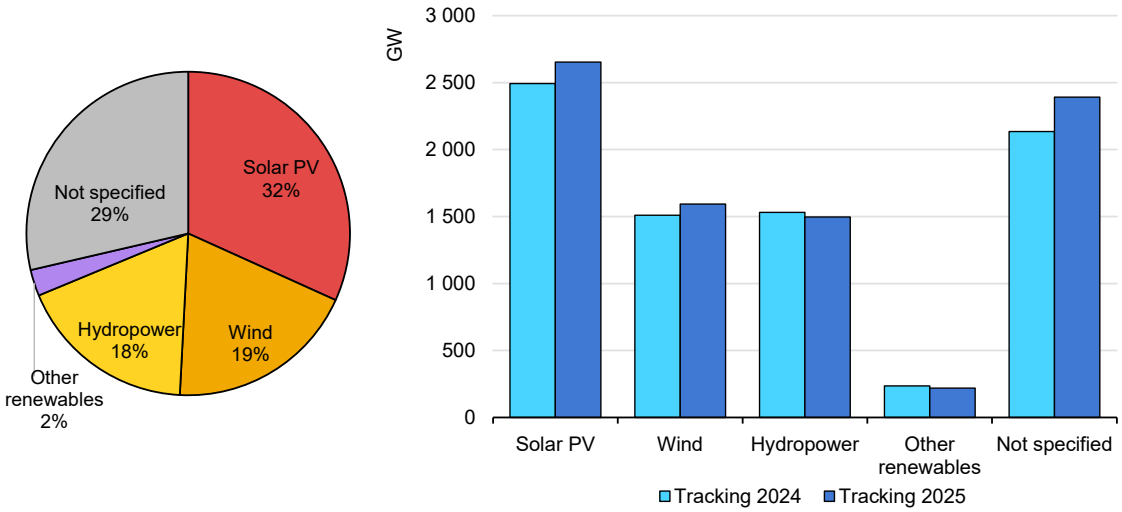
Solar PV is the most specified technology in national ambitions, followed by wind and hydropower

Solar PV remains the preferred technology, accounting for one-third (or 2 650 GW) of global ambition by 2030, 6% higher than last year's assessment. Countries' goals for wind energy deployment are also higher by 6%, reaching almost 1 600 GW. Fifty-four countries have explicitly identified ambitions for solar PV capacity by 2030, 49 for wind and 39 for hydropower.

Globally, nearly 2 400 GW of capacity is announced for installation by 2030 without any indication of which technologies it relates to. This is because multiple 2030 ambitions do not include an explicit breakdown of capacity by technology. Many provide only a total renewables value or, in some cases, specify a few technologies but not the full scope of the ambition. In such cases, the ambition cannot be linked to any specific technology and is classified as "not specified", which in our latest analysis accounts for almost 30%.

This lack of detail can, in some cases, offer flexibility for renewable deployment, particularly for solar PV and wind. However, in other cases, it may reflect insufficient system planning. Some technologies, such as solar PV and wind, can compete within the same markets or systems, while others, like hydropower or geothermal, require specific regulatory frameworks and system conditions to be effectively deployed.

Renewable capacity ambitions by 2030 by technology



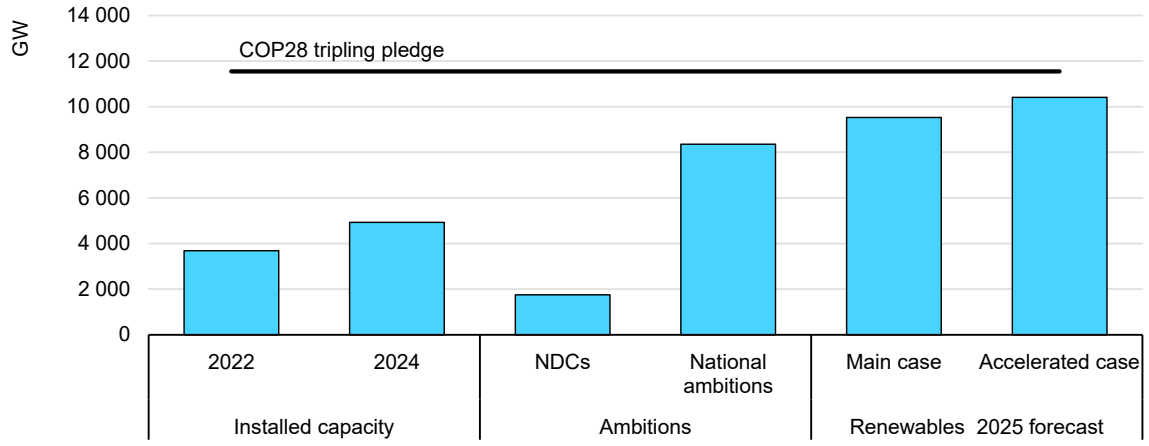
Note: Other renewables include bioenergy, geothermal, concentrated solar power and ocean technologies. "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition) and "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions.

Global renewables growth set to outpace current government goals for 2030 but still fall short of tripling

The combined national ambitions for installed renewable capacity in 2030 are 2.3 times the installed base (2022). However, renewable deployment could exceed this level. The IEA's Renewables 2025 report forecast indicates that policies and market dynamics are expected to drive renewable deployment to just over 9 500 GW - 2.6 times its 2022 level by 2030; an increase that nevertheless falls short of the COP28 tripling pledge.

The tripling pledge can still be brought within reach if countries adopt enhanced policies to bridge gaps in both ambition and implementation. In the accelerated case of the recent IEA renewable energy forecast, global renewable capacity reaches 2.8 times its 2022 level by 2030, provided countries minimise policy uncertainties, reduce permitting timelines, increase investment in grid infrastructure, expand flexibility to facilitate the integration of variable renewables and de-risk financing.

Historical renewable capacity, 2030 ambitions (NDC and national), and Renewables 2025 forecast



Source: Installed capacity and forecast based on IEA (2025), Renewables 2025.

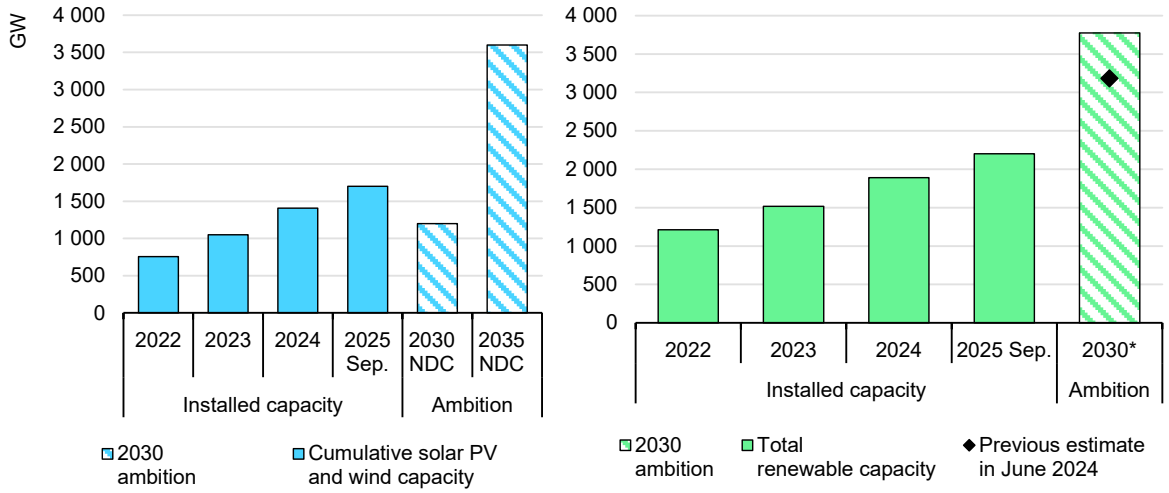
Chapter 2. Regional trends

China

Faster solar PV and wind growth increases the ambition for 2030

China's renewable capacity ambitions are estimated at almost 3 800 GW by 2030, nearly 600 GW higher than last year's figure. This increase is based on estimates considering recent policy announcements and modelling updates that incorporate recent deployment and cost reduction trends to reach China's carbon neutrality goal by 2060, announced in 2020 by President Xi Jinping.

China's NDC goals for wind and solar PV (left) and its estimated 2030 ambition trajectory for cumulative capacity for all renewables (right)



Notes: China does not have an official total renewable capacity ambition for 2030. The renewable energy capacity trajectory in the figure is based on various modelling results. Solar PV values are in AC in this figure.

Source: For historical capacity: China, National Energy Administration of China (2025). For NDC goals: UNFCCC (2025), China's Achievements, New Goals and New Measures for Nationally Determined Contributions.

China has not announced an explicit goal for total renewable capacity by 2030 or set one out in any other official policy document. However, it has released several technology-specific capacity goals, including those for wind, solar PV and pumped-storage hydropower. In its updated NDC submission to the 2.0 round in 2022, China committed to peaking CO_2 emissions before 2030, aiming for 1 200 GW of combined wind and solar power capacity by 2030 – a milestone that it achieved six years early, in July 2024. To estimate China's 2030 ambition in last year's report, we considered these existing capacity ambitions, its consistent

history of exceeding renewable energy goals and modelling results from multiple institutions to better reflect the country's likely pathway toward its long-term climate neutrality objective.

In November 2025, China released its new NDC submitted for the 3.0 round setting a new economy-wide ambition to reduce net GHG emissions by 7-10% below peak levels by 2035 and pledging to pursue even deeper cuts. It also set a new ambition to expand wind and solar PV capacity to 3 600 GW by 2035. Based on cost reductions and recent deployment trends indicating faster deployment of renewables compared to last year, especially for wind and solar PV, the modelling results have also been updated. Considering these factors – as well as the country's long-term 2060 decarbonisation goal – our updated assessment indicates that China could install almost 3 800 GW of total renewable capacity by 2030.

Europe

Final National Energy and Climate Plans confirm Europe's ambition levels

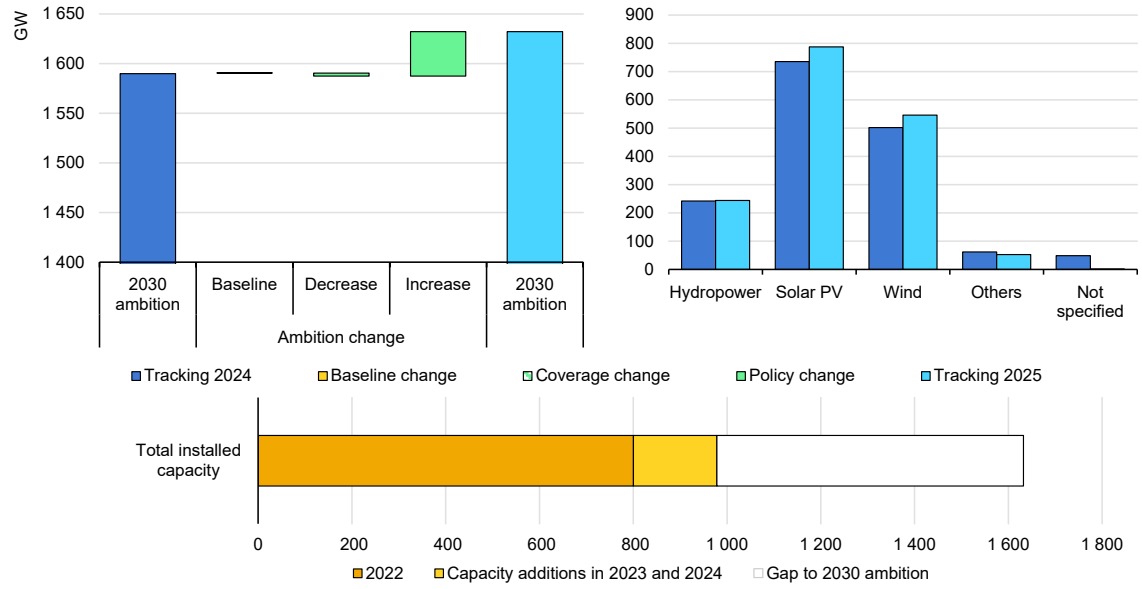
Europe's combined renewable capacity ambitions now exceed 1 630 GW by 2030, more than double the 800 GW of installed capacity in 2022. By the end of 2024, countries in the region had already achieved 60% of this ambition. The seven largest contributors – France, Germany, Italy, the Netherlands, Spain, Türkiye and the United Kingdom – account for two-thirds of the region's total.

The region's overall ambition has increased by over 42 GW (almost 3%) compared with last year's COP28 Tripling Renewable Capacity Pledge report. More than half of this growth (22 GW) is driven by **EU member states,** mainly through the submission of final National Energy and Climate Plans (NECPs), which replace the draft versions used in last year's assessment. Overall, the European Union's ambitions increased by almost 2%. Several non-EU countries also updated their key policy documents, contributing the rest of increase the increase (21 GW).

In 18 of the 35 European countries analysed, updated policies resulted in higher ambitions, adding a combined 45 GW to the region's total. **The United Kingdom** accounted for nearly half of this increase, raising its ambition by almost 19 GW. Its previous ambition of around 103 GW (from the Energy and Emissions Projections 2021–2040) has been replaced by the Clean Power 2030 Action Plan, which sets a new ambition of nearly 122 GW and introduces technology-specific goals. This clarification substantially reduced the share of unspecified capacity and increased planned offshore wind and solar PV ambitions. **Finland** recorded the second-largest upward revision, increasing its ambition by more than one-third (+6 GW) in its final NECP. **Denmark** increased its ambition by almost 5 GW

(+16%), shifting from offshore wind (-1.3 GW) to solar PV (+6 GW), reflecting challenges in offshore wind auctions. **Latvia** also saw a significant increase in its ambition levels by almost half (+1.5 GW), as it now includes technology-specific capacity ambitions in its final NECP, whereas the drafts only provided generation-based values which resulted in higher estimates than the new values.

European countries' combined 2030 renewable electricity capacity ambitions (left), by technology (right) and total installed capacity (bottom)



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Notes: "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition) and "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions. "Baseline" includes changes to existing installed capacity in countries without stated ambitions as well as adjustments to the methodologies used to calculate ambition. "Coverage" refers to additional capacity identified in existing policy documents as well as from countries that were newly added to the assessment.

Sources: 2022 based on data from IEA (2025), Renewables 2025. Policy sources available in the online Annex: Tracking 2025 Sources.

Five countries lowered their ambitions, resulting in a total reduction of almost 3 GW. **Luxembourg** accounted for more than half of this decline. Similar to Latvia, the country now includes explicit capacity ambitions instead of generation values. **Belgium** accounted for an additional decrease of almost 1 GW. The downward adjustments in **Italy** and **Estonia** were modest and mainly reflect the finalisation of their NECPs.

Two countries, **Austria** and **Türkiye**, also released new policy documents, but their ambitions remained unchanged for 2030. Baseline changes in ten countries accounted for around 1% (+0.5 GW) of the overall increase in ambitions.

Solar PV and wind comprise the largest ambitions in Europe, together accounting for more than 80% of the total. Both technologies increased relative to last year – by 7% for solar PV and 9% for wind – driven mostly by the United Kingdom's new

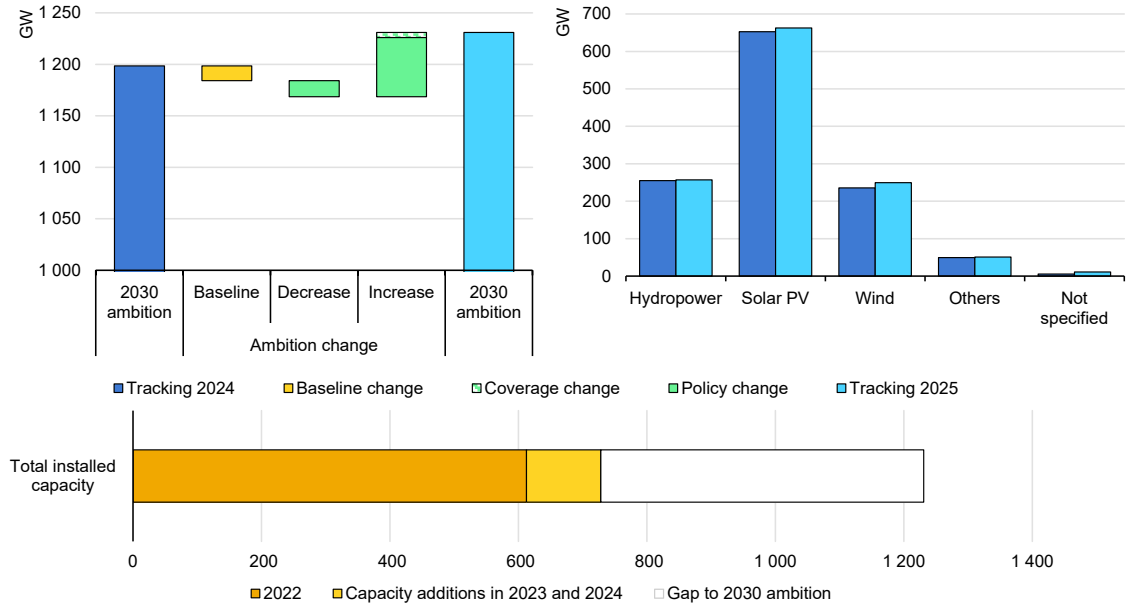
technology-specific capacity ambitions. This also reduced Europe's unspecified capacity from almost 49 GW to less than 2 GW. Hydropower ambitions remained largely unchanged year-on-year. Bioenergy ambitions declined in 16 countries and by almost 14% in total.

Asia Pacific

Ambition remains steady as major markets maintain existing goals while others realign policies to evolving power demand

In the Asia Pacific region (excluding China), renewable capacity ambitions for 2030 total more than 1 230 GW, based on announced NDCs, national ambitions and other official plans.[1] This corresponds to a doubling of installed capacity relative to 2022, with around 60% of the ambition already achieved as of 2024, driven by rapid deployment in 2023 and 2024.

Asia Pacific countries' 2030 renewable electricity capacity ambitions (left), by technology (right) and total installed capacity (bottom)



Notes: "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition) and "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions. "Baseline" includes changes to existing installed capacity in countries without stated ambitions as well as adjustments to the methodologies used to calculate ambition. "Coverage" refers to additional capacity identified in existing policy documents as well as from countries that were newly added to the assessment.

Sources: 2022 based on data from IEA (2025), Renewables 2025. Policy sources available in the online Annex: Tracking 2025 Sources.

[1] Including projections from published government agencies' energy system modelling reports.

Overall ambitions in the region have increased by only 3% (32 GW) compared with those in the 2024 COP28 Tripling Renewable Capacity Pledge report. The upward revision is driven primarily by new government plans and updated modelling results in Australia, Cambodia, New Zealand and Viet Nam, which more than offset the downward adjustments from revised reference data in Indonesia and lower deployment plans in Pakistan, the Philippines and Chinese Taipei. Ambitions remain unchanged in the region's largest markets, India and Japan. In total, baseline updates to ambition calculations reduced the regional total by 14 GW, while policy and planning updates resulted in a net upward adjustment of 42 GW. A further 5 GW was added this year due to the expanded geographical coverage of the analysis.

A total of 58 GW was added to the region's 2030 ambitions, driven by upward revisions in official planning documents in seven countries**. Viet Nam** accounted for almost 60% of this increase, following the update of its Eighth Power Development Plan, which substantially raises planned 2030 capacity, particularly for solar PV and onshore wind. The revised plan underscores the critical role of renewables in meeting rapidly rising electricity demand and reflects growing efforts to address grid integration challenges that had constrained earlier planning.

The second-largest upward revision is from **Australia**, contributing 21% of the total increase. The latest update of Australia's Emission Projections – a publication tracking progress toward its national emissions reduction ambitions – raised expected wind capacity by 10 GW and solar PV by 3 GW based on new, more ambitious renewable development plans announced by regional governments.

Cambodia's 2030 ambition increased by 4 GW (almost 150%) to reflect the 70% renewable capacity share included in the country's latest NDC 3.0. In **Korea**, the latest Basic Electricity Supply and Demand Plan raises overall 2030 ambitions by around 2 GW (2%), driven by higher solar PV expectations despite a downward revision for wind.

In contrast, **Pakistan's** updated Indicative Generation Capacity Expansion Plan 2025 revises renewable capacity downward across all technologies by a total of 9 GW (23%), reflecting slower deployment and demand growth. However, these projections do not account for the recent rapid uptake of behind-the-meter off-grid distributed PV developments. **The Philippines'** new Energy Plan 2023-2050 similarly reduces 2030 expectations by around 10%, with a downward revision in solar PV partly offset by higher wind capacity. This reflects recent deployment trends and lower power demand projections by the government, while the ambition of 35% renewables in electricity generation is maintained.

Beyond policy-related changes, baseline changes amount to 14 GW, mostly due to updated assumptions on **Indonesia's** deployment plans from its recently published Electricity Supply Business Plan 2025–2034.

Solar PV is expected to deliver almost 55% of total renewable capacity ambition in the Asia Pacific region. Current plans indicate over 660 GW of solar PV capacity by 2030 – 2.3 times the 2022 level – and 10 GW (2%) higher than reported in 2024. It remains the preferred renewable technology option in most countries due to its cost competitiveness, relatively straightforward development process and opportunities to deploy rooftop systems to ease land-use constraints.

Wind power ambitions indicate a tripling of installed capacity between 2022 and 2030, reaching a total capacity of 250 GW and marking a 6% upward revision compared with last year's report. Almost all the capacity is expected to come from onshore wind, as offshore ambitions are explicitly defined only by Japan, Chinese Taipei and Viet Nam.

Overall, ambitions for dispatchable renewable technologies account for 25% of total capacity in national plans. Hydropower ambitions exceed 255 GW by 2030 – more than 20% higher than 2022 levels – with substantial additions explicitly mentioned in national ambitions in India, Indonesia, Pakistan and Viet Nam, where sizeable untapped potential remains. Geothermal ambitions, defined in seven countries and led by Indonesia, Japan, New Zealand and the Philippines, total 11 GW, representing a 24% increase from last year. Bioenergy ambitions remain largely unchanged at 40 GW, nearly 20% above the 2022 capacity with capacity growth plans led by India, Indonesia and Viet Nam.

Americas

Steady ambitions in most markets insufficient to offset policy shifts in others

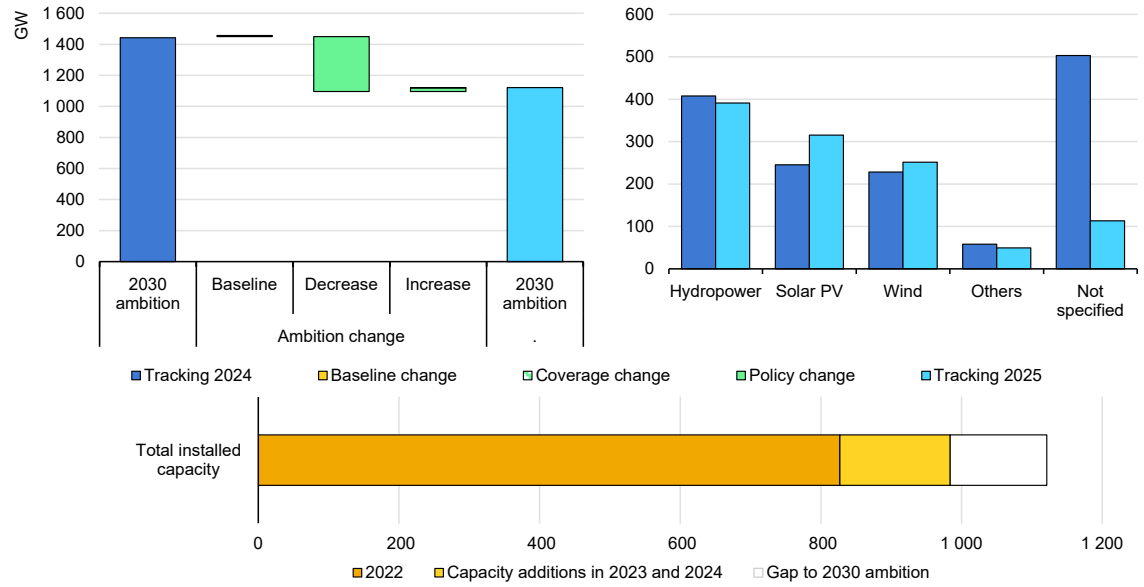
National renewable capacity ambitions of countries in the Americas (North America, Central America, South America and the Caribbean) for 2030 total 1 121 GW, 36% higher than the capacity installed in 2022. By the end of 2024, almost 90% of this ambition had been reached.

The United States accounts for the largest downward revision in aggregated national ambition in the Americas (-42%). In January 2025, Executive Order 14148 revoked the 2021 Executive Order 14008, which aimed for 100% clean electricity by 2035. Downward adjustments in other countries in the Americas total 1 GW.

Conversely, four countries have raised ambitions over the last year by introducing new policies, although these total only 24 GW. The largest upward revision is from **Brazil** (+20 GW), reflecting a 9% rise through the addition of 60 GW between now and 2040 outlined in the 2024 edition of the Plano Decenal de Expansão de

Energia. The expanded coverage of the analysis to include policy documents from another eight countries adds a marginal 1.2 GW.

Americas' 2030 renewable electricity capacity ambitions (left), by technology (right) and total installed capacity (bottom)



Note: The Americas includes North America, Central America, South America and the Caribbean. "Tracking 2024" refers to COP28 Tripling Renewable Capacity Pledge (2024 edition) and "Tracking 2025" refers to this publication, COP28 Tripling Renewable Capacity Pledge 2025: Update Tracking countries' ambitions. "Baseline" includes changes to existing installed capacity in countries without stated ambitions as well as adjustments to the methodologies used to calculate ambition. "Coverage" refers to additional capacity identified in existing policy documents as well as from countries that were newly added to the assessment

Sources: 2022 based on data from IEA (2025), Renewables 2025. Policy sources available in the online Annex: Tracking 2025 Sources

Over half of the countries in the region (19) maintained their 2030 capacity ambitions since the last report, accounting for almost 30% of the region's total. The largest are Canada and Chile. Hydropower appears as the largest component of 2030 ambitions, followed by solar PV and wind, although this partially reflects the region's existing hydropower fleet rather than new capacity expansion plans. Ambitions for solar PV and wind have risen by 28% and 10%, respectively.

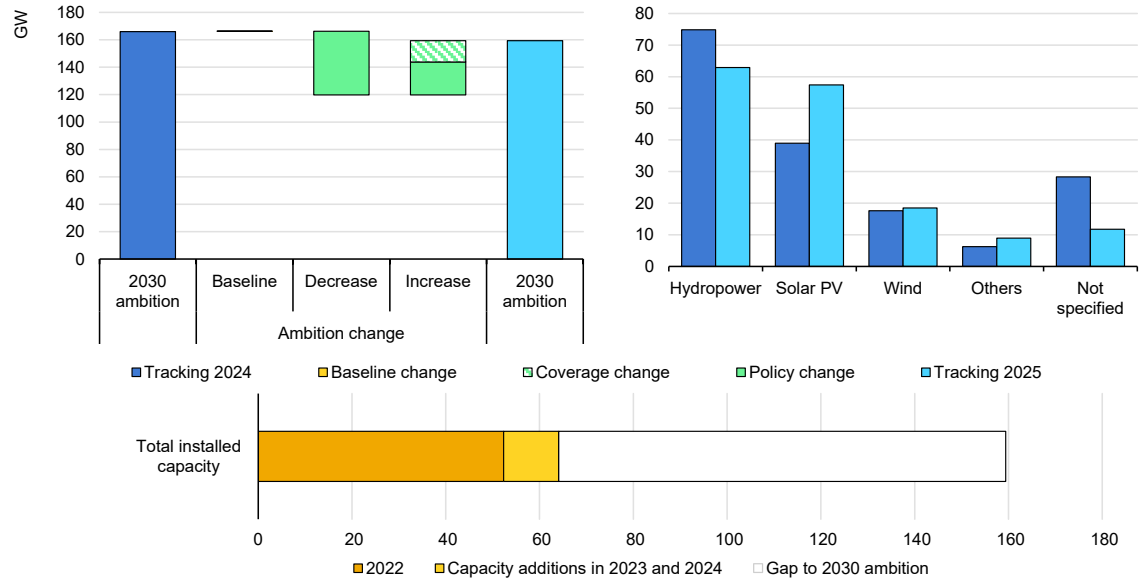
Sub-Saharan Africa

Ambition reflects access, climate and industrialisation goals while updates focus on diversifying generation sources

Sub-Saharan African countries' renewable capacity ambitions for 2030 total 160 GW, 3 times the installed capacity as of the end of 2022. The main drivers of this expansion are rising power demand linked to rapid economic growth, industrialisation, the achievement of universal electricity access and the need to

meet multilateral climate goals. The region saw renewable capacity grow modestly by 22% between 2022 and 2024, averaging 6 GW per year. To reach the 2030 goal, however, annual additions will need to rise to around 19 GW.

Sub-Saharan African countries' 2030 renewable electricity capacity ambitions (left), by technology (right) and total installed capacity (bottom)



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Government ambitions in the region for 2030 are 4% lower compared with last year's report. However, this small decrease masks divergent country-level trends across almost 50 countries. First, 14 countries revised their ambitions upward by a combined 24 GW. Second, this year's analysis expanded coverage by adding the ambitions of a further 21 countries with multilateral commitments representing 16 GW. Third, these upward adjustments were offset by significant downward revisions in six countries – collectively amounting to 46 GW – partly due to lower hydropower expectations.

New and updated policies announced since the last report account for 24 GW of the increase in the region's ambitions. **South Africa's** new 2030 ambitions represent the largest single upward revision (+8 GW). The country raised its 2030 goals to over 36 GW in the Integrated Resource Plan published in October 2025, almost 30% higher than the previous Integrated Resource Plan published in 2023, which focused on minimising total power system costs and decreasing load

shedding. Another key development since last year's analysis is the allocation of previously unspecified renewable capacity to solar PV, wind and hydropower.

The remaining increase attributed to policy changes – around 16 GW – comes mostly from two main multilateral policy announcements that have significantly quantified and raised countries' ambitions. The first category consists of updated NDCs. For example, **Angola's** new NDC 3.0 (2025) doubles its renewable capacity ambition to above 6 GW, driven by recent hydropower projects coming online and the goal of a 72% renewable capacity share by 2030.

The second set of multilateral pledges is the Mission 300 National Energy Compacts, currently submitted by 30 national governments in the region to contribute to the collective goal of providing 300 million people with access to electricity by 2030. These compacts, prepared by national governments jointly with the World Bank and African Development Bank, outline national plans to increase access to electricity while aligning with wider energy strategies and often include new or existing renewable ambitions. For example, **Zambia's** National Energy Compact seeks to triple its 2030 ambition from 3.3 GW to 9 GW by increasing private investment, scaling up distributed energy and harmonising cross-border electricity trade. **Guinea's** Energy Compact specifies upcoming renewable projects until 2030, with an aim to install 1.6 GW of hydropower and 1.1 GW of solar to support the development of its mining industry, while similarly highlighting the importance of cross-border electricity trade. Increased coverage of national policies, mostly through these two multilateral commitments over the last year, accounts for an added 16 GW from 21 countries.

Three countries, Nigeria, Ethiopia and Mauritania, are responsible for almost 90% of the 46 GW downward revision in the region's ambition. According to **Nigeria's** previous NDC 2.0 (2021), 38 GW of renewable capacity was necessary to reach its NDC goal. However, the latest Energy Transition and Investment Plan (2024) expects only 60% (22 GW) to be installed by 2030. Nigeria's NDC 3.0 (2025) also anticipates greater short-term reliance on natural gas, given the country's significant domestic reserves and expectations for the development of carbon capture, utilisation and storage (CCUS). **Ethiopia** has similarly lowered its 2030 renewable aims by 40% from the 25 GW stated in its Scaling-Up Renewable Energy Program (2012). The country also has strategies that include lower but more diverse goals, such as the National Energy Compact (2025), which aims for up to 14 GW overall, while the National Sustainable Energy Development Strategy (2024) defines solar PV, wind and geothermal generation shares, diversifying the energy mix away from overreliance on hydropower. Last year's report included **Mauritania's** 13 GW renewable ambition for 2030 dedicated to hydrogen production, but this has since been pushed back to 2035 in its NDC 3.0 (2025) as the country focuses on electricity market reform, gradual liberalisation and accelerating nationwide electricity access.

In sub-Saharan Africa, hydropower appears as the largest renewable technology in 2030 ambitions. However, overall ambitions for hydropower have been lowered by 15% to 63 GW, since last year's report, reflecting longer development lead times, rising costs and ongoing efforts to diversify renewable generation sources. Solar ambitions, in contrast, have increased by 45% to 57 GW due to declining costs and strong solar resource potential. For most countries, recently published objectives have been more explicitly formulated and attributed to technologies or planned projects, decreasing the unspecified-technology category by almost 60% to just 12 GW (7% of the total ambition by 2030).

Beyond solar, wind and hydropower, several countries in the region are developing pilot projects in other renewable technologies. For example, **Botswana** aims to install 200 MW of concentrated solar power, while **Tanzania** at least 100 MW, Zambia 30 MW and Ethiopia an almost 7% generation share of geothermal. **Mauritius** and **Djibouti** respectively plan 20 MW and 5 MW of marine or tidal-based generation. Bioenergy continues to play an important role in the region and is expected to more than double to roughly 6 GW.

Eurasia

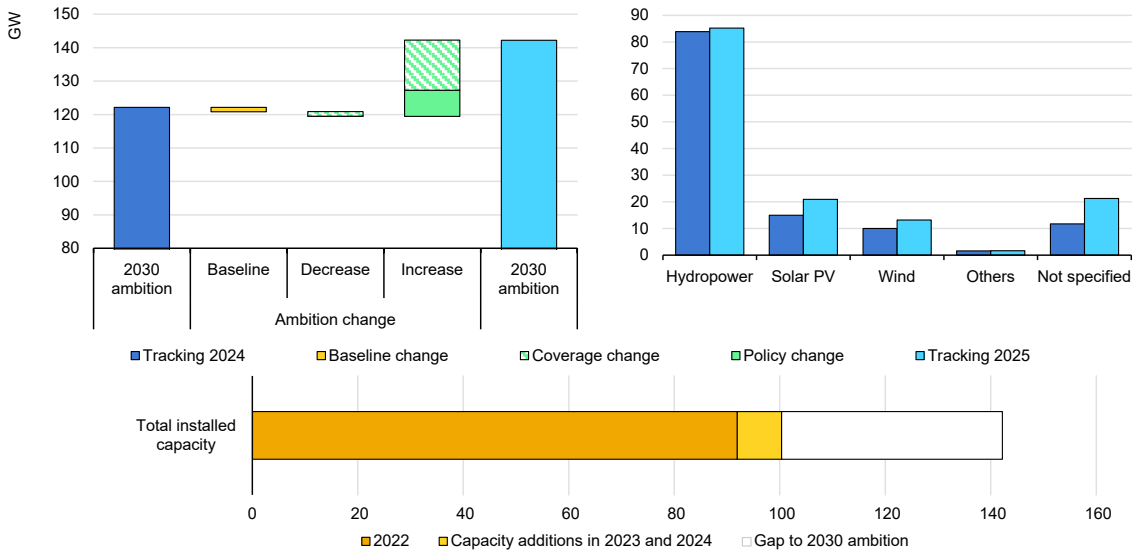
Policy changes aim to expand solar PV and wind to complement existing hydropower fleet

Countries in Eurasia have a combined renewable capacity ambition of 142 GW for 2030, 1.5 times higher than in 2022 according to updated NDCs, national plans and other official announcements. As of 2024, installed renewable capacity in the region has reached 100 GW, leaving a 30% gap to achieving 2030 ambitions. Almost half of the region's 2030 total reflects capacity without explicit national ambitions, essentially the existing technology fleet, which is dominated by the Russian Federation's substantial hydropower base.

There has been a net increase in the region's combined ambition of more than 20 GW (16%) compared with last year's report. Nearly 8 GW (33%) of this increase is driven by policy changes announced in three countries. **The Kyrgyzstan** published new technology ambitions in its NDC 3.0, **Azerbaijan** announced increasing ambitions during the at the 15th Petersburg Climate Dialogue in April 2024 and **Albania** set new technology ambitions in its 2024 National Energy and Climate Plan.

Expanded policy coverage in **Uzbekistan** accounts for the largest upward revision, adding 15 GW (63% of the total upward revision), as a new policy was identified in the Uzbekistan-2030 Strategy published in 2023. A further 0.8 GW increase reflects updated baseline capacity in the **Russian Federation** and **Serbia**, while policies remain unchanged in both countries.

Eurasian countries' 2030 renewable electricity capacity ambitions (left), by technology (right) and total installed capacity (bottom)



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Sources: 2022 based on data from IEA (2025), Renewables 2025. Policy sources available in the online Annex: Tracking 2025 Sources

Despite net growth in ambition across the region, since last year's report, four countries have lowered their ambitions by a combined 3.8 GW due to revised baseline assumptions and expanded policy coverage. **Kazakhstan's** ambition was revised downward by 2.4 GW to reflect updated assumptions on solar PV capacity factors to meet its 15% renewable electricity generation ambition, which remains unchanged from last year. As the solar market matures, a larger base of operating projects provides more reliable data for estimating these factors.

An additional downward revision of 1.4 GW is driven by expanded policy coverage in **North Macedonia**, **Bosnia and Herzegovina**, and **Georgia**. Policy packages in all three countries remain unchanged from last year, but updates result from new ambitions identified in existing National Energy and Climate Plans. Ambitions for 2030 in the remaining countries (Armenia, Gibraltar, Kosovo, Montenegro, Tajikistan and Turkmenistan) remain largely unchanged from last year's report.

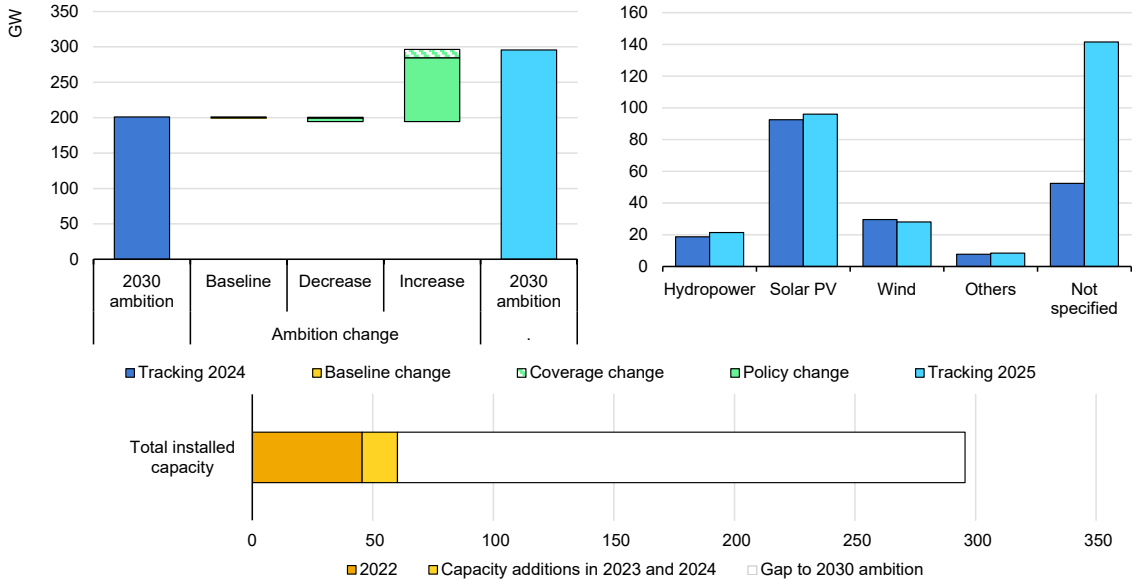
Hydropower remains the largest renewable capacity ambition for 2030, accounting for 60% of the total. However, solar PV and wind ambitions have been revised upward, largely due to the Kyrgyz Republic's new technology-specific plans.

Middle East and North Africa

Greater ambition emerges through the NDC development process

The national ambitions for 2030 of countries in the Middle East and North Africa amount to almost 300 GW, almost seven times greater than installed capacity in 2022. Six countries account for 80% of this total, led by Saudi Arabia (44%), followed by Egypt, Algeria, the United Arab Emirates, Israel[2] and Morocco. The 2030 ambition has been revised upward by almost 50% (95 GW) mostly due to policy changes announced in four countries as part of the UNFCCC NDC process. The region is accelerating renewable deployment, with one-quarter of installed capacity commissioned in the last two years. However, despite this acceleration, the region remains 80% below its goal.

Middle East and North Africa countries' 2030 renewable electricity capacity ambitions (left), by technology (right), and total installed capacity (bottom)



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Sources: 2022 based on data from IEA (2025), Renewables 2025. Policy sources available in the online Annex: Tracking 2025 Sources.

2 * Statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law.

Saudi Arabia is responsible for the largest upward revision (71 GW) in the region. The country doubled its explicit goal of having 59 GW of total installed renewable capacity by 2030 to 130 GW in its first Biennial Transparency Report (BTR 1),[3] submitted in March 2025 to support the Saudi Green Initiative, which aims for emissions reductions, low-carbon industrialisation and economic diversification. Launched in 2021, the initiative aims to displace over 1 million barrels of liquid fuels per day and reach 50% of installed renewable capacity by 2030, supported by plans to tender 20 GW annually.

In addition to Saudi Arabia, nearly 20 GW of upward revisions have come from policy changes in the **United Arab Emirates**, **Morocco** and **Oman**, all of which have raised their 2030 ambitions over the last year through multilateral climate processes. In their latest NDC submission, the United Arab Emirates almost doubled, and Morocco more than doubled, their 2030 renewable ambitions, while Oman submitted a share of 30% renewable electricity generation in its BTR 1 published in 2025.

Expanded coverage of the policy landscape for **Iraq** and **Syria** accounts for 12% of the upward revision. Iraq has a 12 GW ambition, first outlined in its 2021 NDC 2.0 and reaffirmed through ministerial announcements and its first BTR over the last year, marking a major increase from the 2 GW published in its 2012 Integrated National Strategy.

Downward revisions come from **Egypt** and **Tunisia**, reducing the regional ambition by 5 GW. Egypt's first BTR maintains the 42% share of renewable electricity ambition from its NDC submitted in 2023 but drops the technology-specific goals in its National Strategy, lowering estimated capacity needs. Tunisia's ambition is also lower, with values in its first BTR totalling roughly 25% below the level in its 2023 national energy strategy.

Saudi Arabia's new 130 GW ambition does not specify technologies, resulting in a large "unspecified" technology category in the current analysis. However, the country's strong solar resources, recent competitive auction results for purchase power agreements over the last few years, and bilateral contracts suggest that solar PV will account for a substantial share of new capacity, making it the region's most significant identified technology. While several countries have also set wind ambitions, large-scale deployment remains limited to a few markets, and solar PV continues to expand far more rapidly than any other technology. Ambitions for other technologies, such as concentrated solar power, are primarily in **Algeria**, Morocco, Saudi Arabia and the United Arab Emirates.

[3] BTRs are required biannual status reports under the UNFCCC framework that track a country's progress towards its most recently submitted NDC.

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