

PLENARY DEBATE

**“Securing Europe’s power:
hydropower’s role in energy
resilience and strategic autonomy”**



MODERATOR

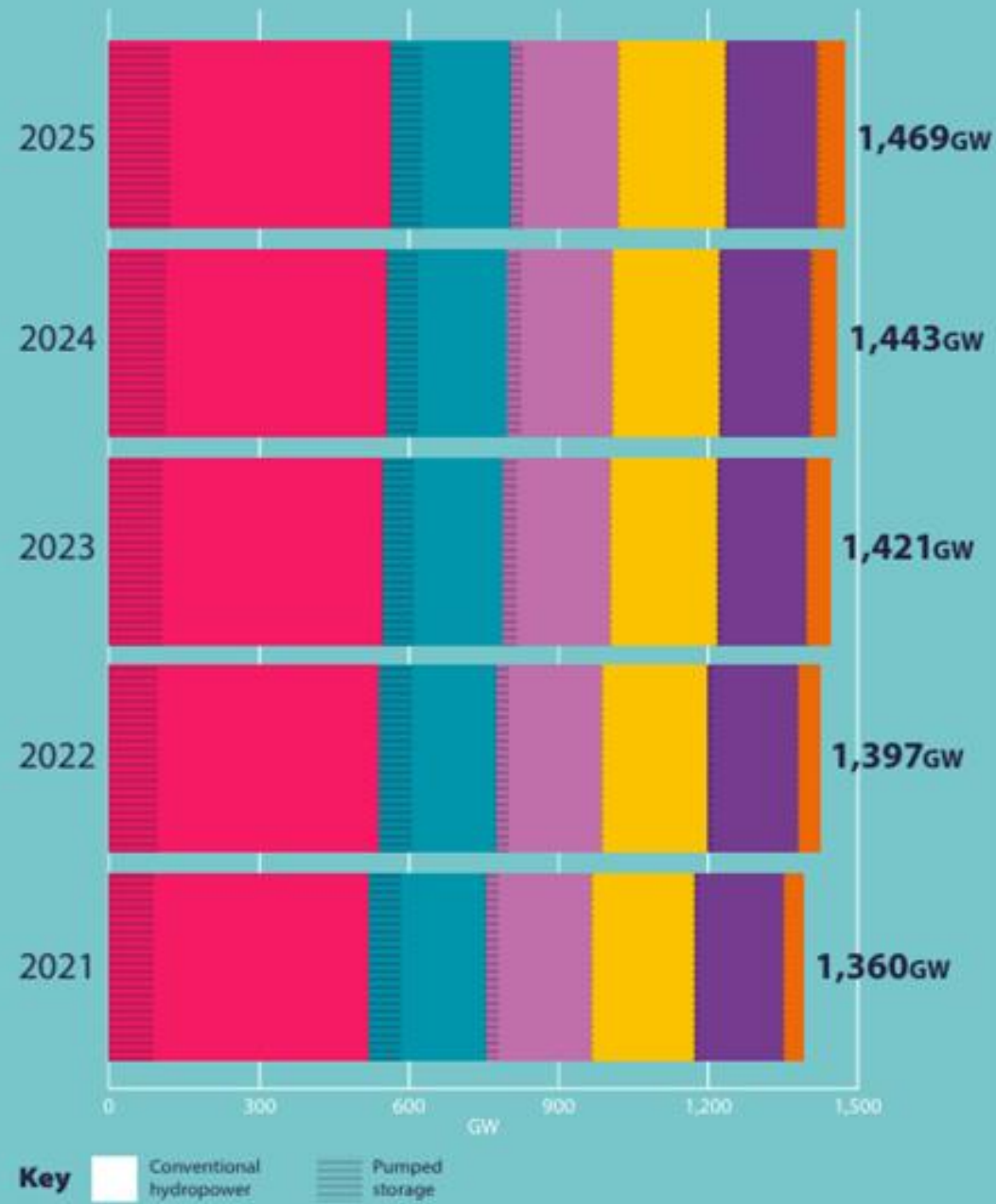
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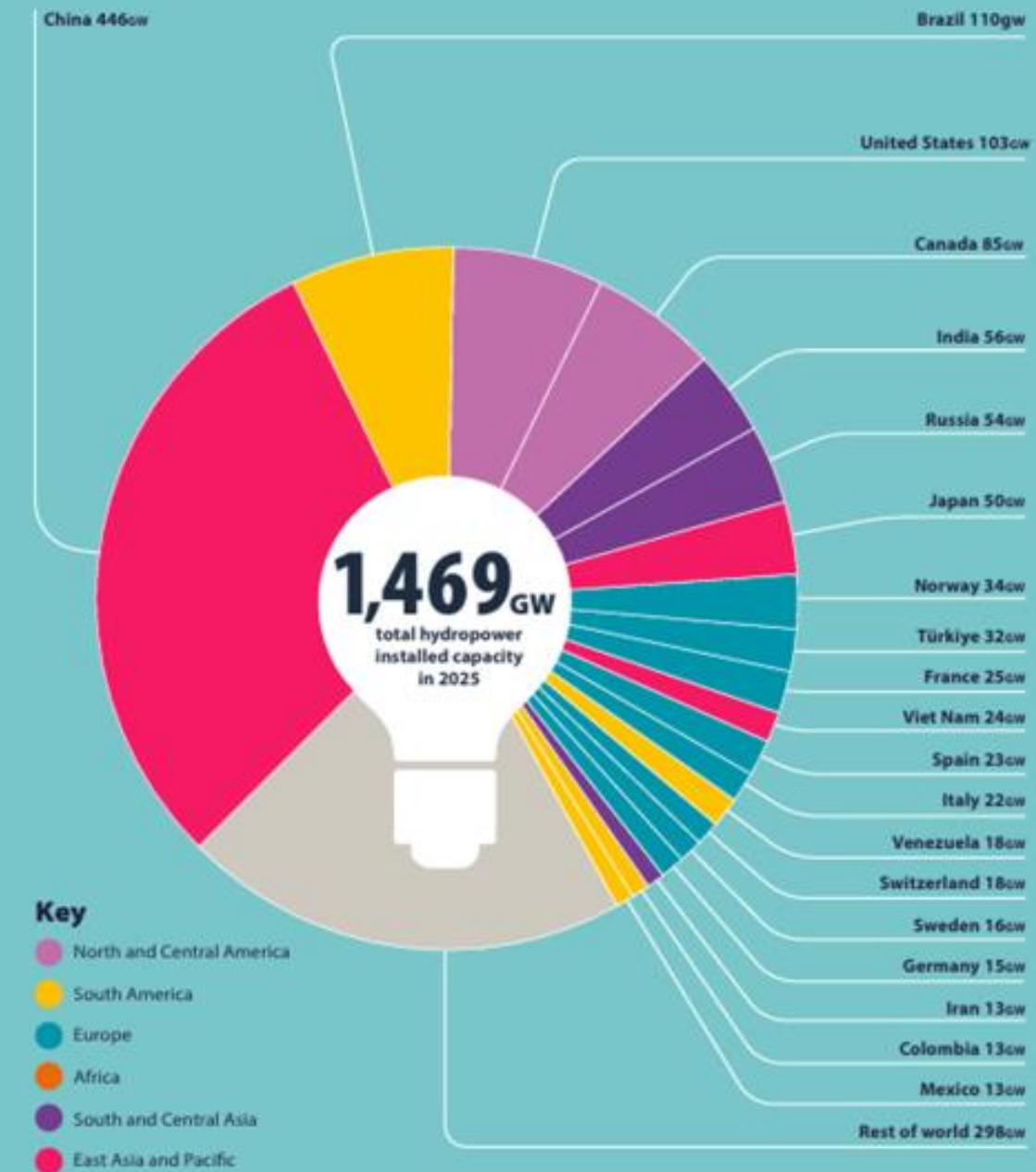
Global hydropower capacity continues to grow

Installed capacity reached 1,469 GW in 2025, led by China, Brazil and the US

Hydropower installed capacity growth 2021–2025



Overall hydropower installed capacity 2025



Key trends in Europe



Generation by
hydropower in 2025

614_{TWh}



Pumped storage
capacity added in 2025

725_{MW}



Total pumped storage
installed capacity

57_{GW}



Capacity added
in 2025*

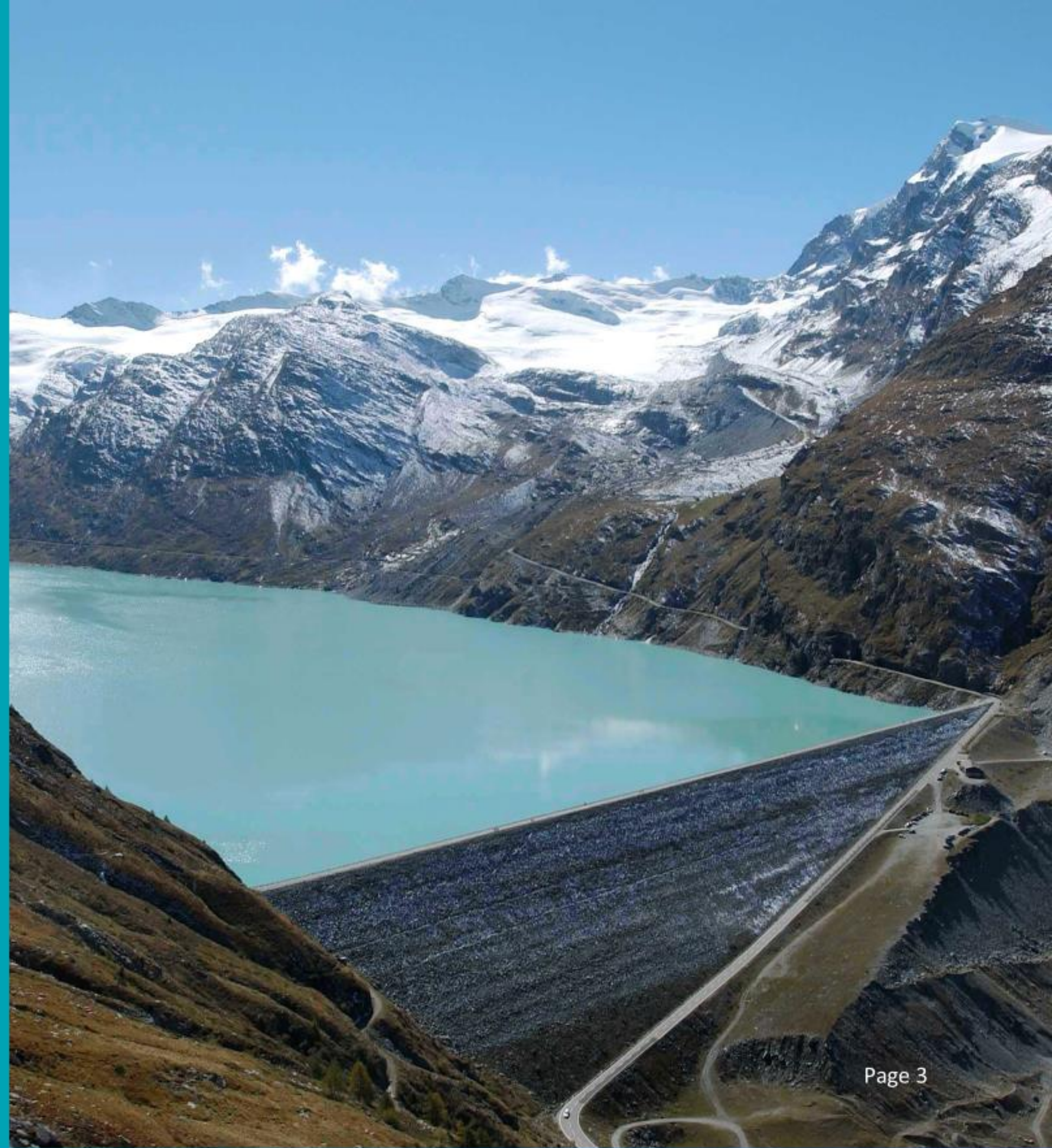
1,533_{MW}



Total installed
capacity*

263_{GW}

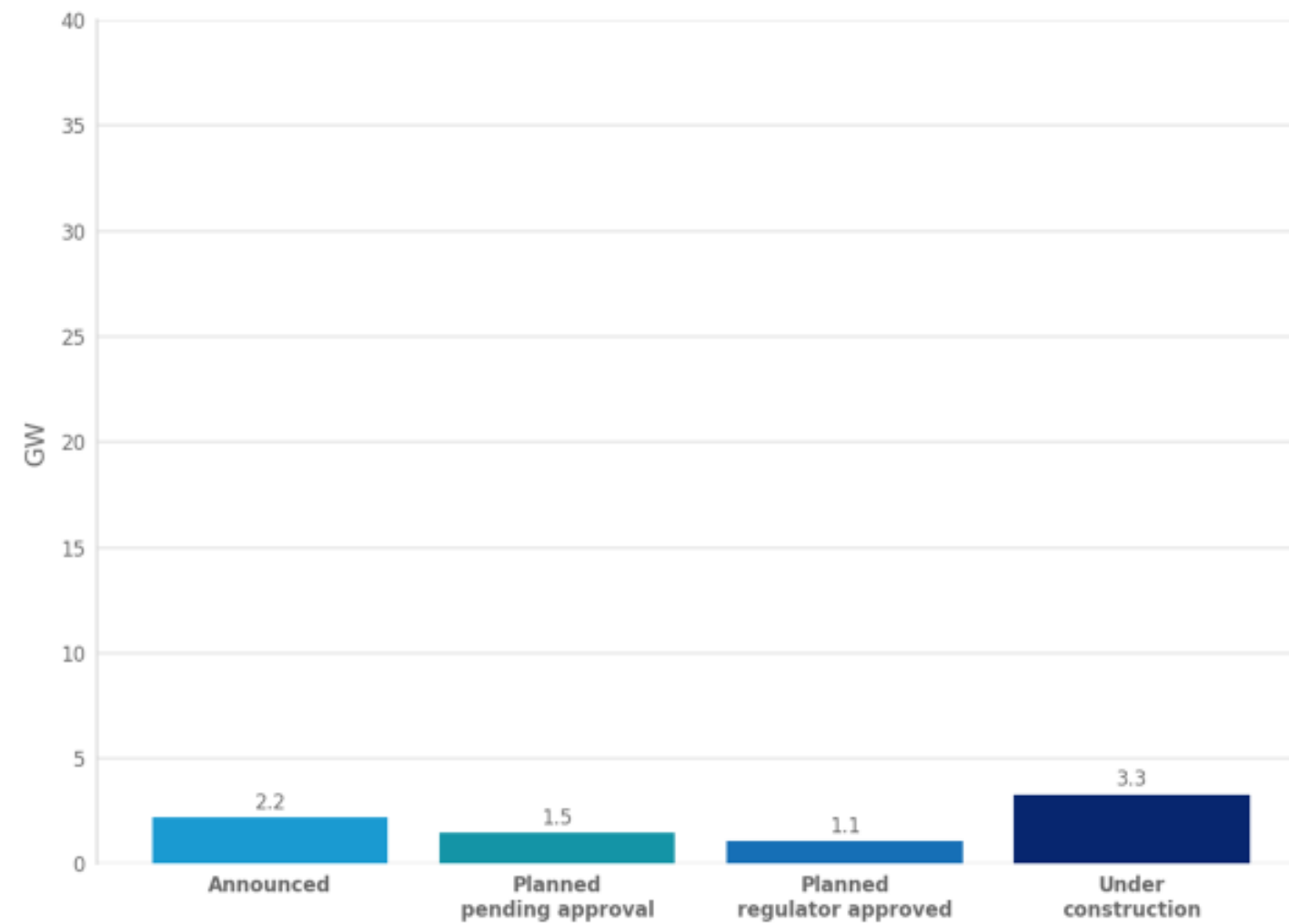
*Includes pumped storage



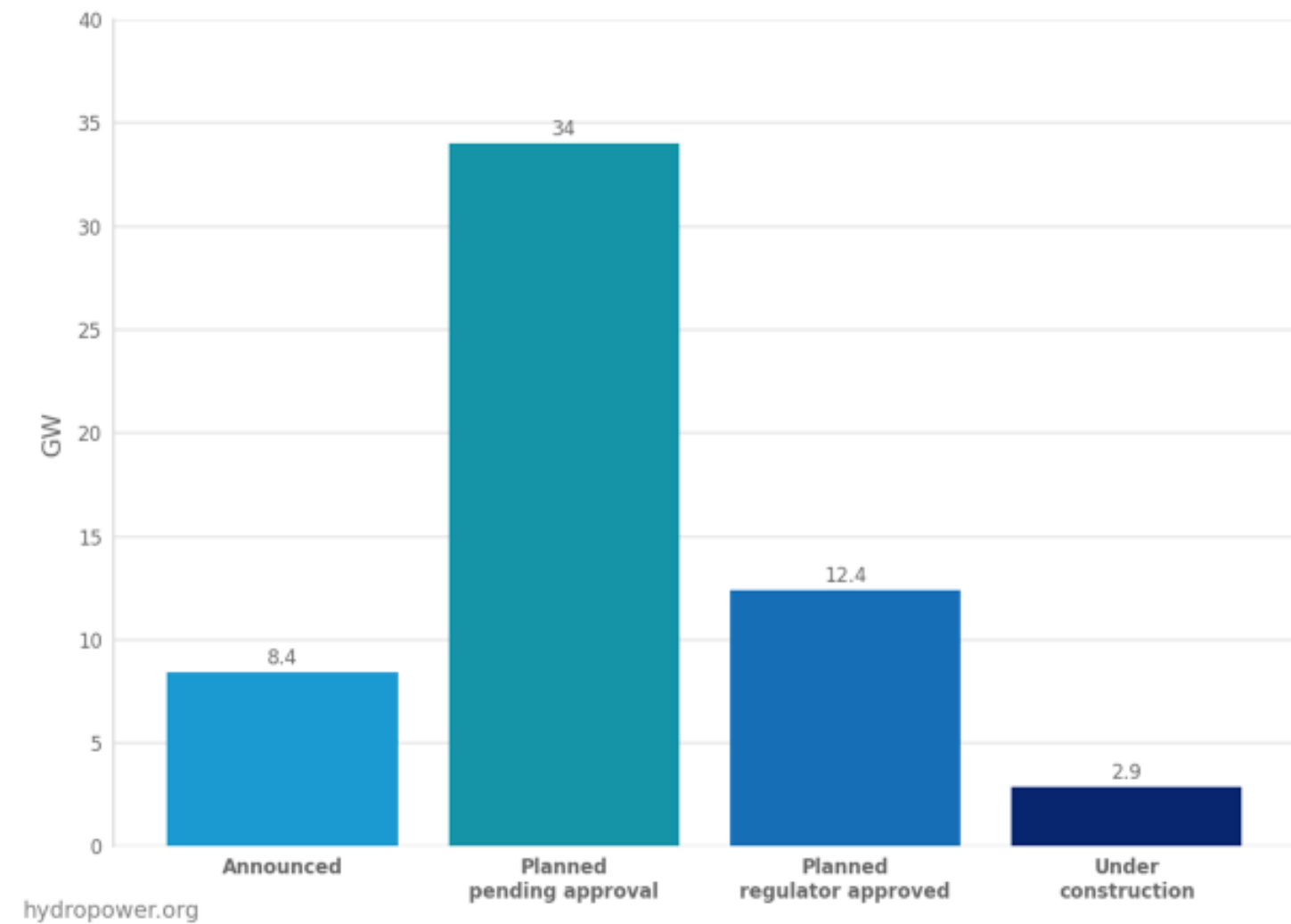
The European pipeline

Pumped storage drives most of Europe's future capacity

Conventional capacity pipeline (GW)



Pumped storage hydropower capacity pipeline (GW)



Hydropower is moving to the centre of energy security

Beyond renewable electricity, hydropower assets can provide:



Domestic
renewable
generation



Dispatchable
capacity and
adequacy



Long-duration
energy storage



Balancing
and reserves



Frequency and
voltage control



Inertia and
system strength



Black start
and restoration



Water and
climate resilience

OPENING QUESTION:

Is hydropower already recognised as part of Europe's strategic resilience or are policy and market design still catching up?

“Securing Europe’s power: hydropower’s role in energy resilience and strategic autonomy”



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