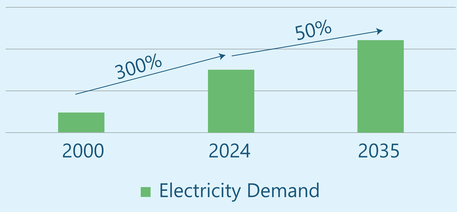
Middle East Energy 1 - 3 September 2026 | Dubai x PTR

From Targets to Delivery: GCC Renewable Policy and the Impact on MV Grid Equipment

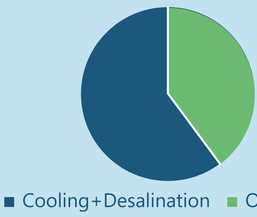
GCC Renewable Policy Is Shifting from Ambition to Delivery

GCC governments have largely moved past announcing ambition. The policy challenge is now delivery: meeting rising electricity demand, cutting dependence on oil-fired power, and building systems that can absorb more renewable generation reliably. Policy is shifting from adding renewable capacity to enabling reliable, resilient power systems. That is the real transition from ambition to delivery.



Electricity demand tripled in MENA between 2000 and 2024, and is projected to rise by another 50% by 2035. [IEA]

% Share of Demand Growth



Cooling and desalination are on course to account for close to 40% of projected demand growth to 2035. [IEA]

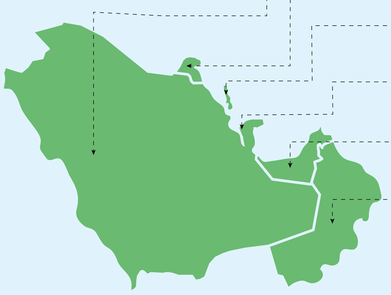
Why policy is becoming more aggressive?

The acceleration is being driven by system pressure as much as by climate ambition. In the IEA's outlook, extreme heat, water scarcity, urban growth, electrification, and new digital infrastructure are all pushing power demand higher across the region.

Policy ambition is now region-wide

GCC policy review shows that renewable targets are no longer isolated country initiatives. They are now embedded across the region's policy landscape, increasingly tied to NDCs, national visions, and longer-term transition planning.

Country map:



Saudi Arabia: 45%–50% of electricity generation by 2030 [Saudi MOE]

Kuwait: Renewables to reach **30%** by 2030; **50%** by 2050 [Kuwait Gov]

Bahrain: 5% of electricity by 2025; **20%** by 2035 [Bahrain NREAP / SDG Portal]

Qatar: 4 GW by 2030; renewables to rise from **5% to 18%** by 2030 [Qatar KAHRAMAA]

UAE: Triple renewable contribution by 2030; **50%** clean energy by 2050 [UAE Gov]

Oman: 30% of electricity by 2030 [Oman MEM]

Renewable and BESS Delivery Will Lift Demand for MV Grid Equipment

As renewable and storage projects move into execution, they increase the need for the infrastructure required to connect, protect, and reinforce the grid. In the GCC, this is expected to support growth in MV switchgear and distribution transformers, driven by solar and BESS interconnections, feeder reinforcement, and substation upgrades.

MV switchgear market growth, 2024–2030

Growth is expected to be strongest in the medium-voltage bands most exposed to renewable plants and interconnections, feeder expansion, and distribution network upgrades.

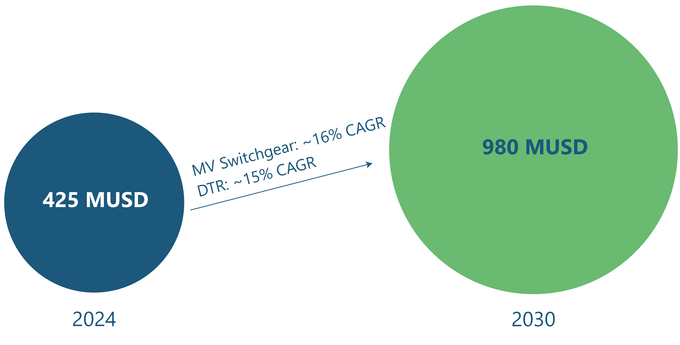
120% increase in demand

Distribution transformer market growth, 2024–2030

New solar PV and BESS capacity increases the need for step-up, step-down, and distribution transformer capacity across connection points, substations, and reinforced feeder networks.

145% increase in demand

MV Switchgear and DTR Annual Demand from RE



MV Switchgear and DTR Annual Demand [PTR]