

ETIP Wind Steering Committee meeting
Monday 7th March 2016 11:00–16:45
EWEA office, Rue d’Arlon 80 6th floor Bruxelles
AGENDA

ETIP Wind Steering Committee Meeting:	
11:00 – 11:30	Welcome <ul style="list-style-type: none"> • Introduction of participants Kristian Ruby, EWEA Chief Policy Officer
11:30 – 12:00	ETIP Wind Governance <ul style="list-style-type: none"> • Communication of the structure and governance of the ETIP Wind. • Appointment of “2nd” to the ETIP Wind SC representative. Kristian Ruby, EWEA Chief Policy Officer
12:00 - 12:45	ETIP Wind Work Programme 2016 - approval <ul style="list-style-type: none"> • Based on the draft ETIP Wind Work Programme distributed by the secretariat a discussion of the Work Programme 2016 will be called for. • Agreement on ETIP Work Programme 2016 Kristian Ruby, EWEA Chief Policy Officer
12:45 – 13:30	Lunch
13:30 – 15:30	Strategic Research Agenda (SRA) and Marked Deployment Strategy (MDS) <ul style="list-style-type: none"> • The methodology on collecting data for writing the “status report on the implementation of the SRA and the SET-plan integrated roadmap including analysis of short, medium and long term priorities for future wind energy related R&I topics” will be presented ETIP Wind Operational Group 1
15:30 – 16:15	Validation workshop delivering input to the H2020 Energy Programme 2018-2020 <ul style="list-style-type: none"> • Communication about the planned workshop validating the key content of the SRA 2016. • Discussion of topic for the workshop 01 taking place 26 September 2016, Hamburg. ETIP Wind Operational Group 3
16:15 – 16:45	AOB and next step <i>Next steps and AOB</i>

Background information:

Work flow on updating the Strategic Research Agenda and Integrated Roadmap:

Implementation of the Strategic Research Agenda and the SET-Plan Integrated Roadmap (Work Package 1)

Objectives: This work package will provide an updated status on wind research and innovation priorities to the European Commission. To this the deliverables of this WP will:

- Assess the level of implementation of the R&I priorities outlined in the Strategic Research Agenda and Market Deployment Strategy (SRA/MDS) and the status of the R&I actions stated in the SET-Plan Integrated Roadmap (SET-Plan IR) in the area of wind energy.
- Inform about the latest technological developments, investment trends in R&I, regulatory and market frameworks affecting the implementation of the SRA/MDS and the SET-Plan IR.
- Provide for recommendations for short, medium and long term priorities for future R&I priorities.

Deliverable

D 1.2 **Status report** on the implementation of the SRA and SET-plan integrated roadmap including analysis of short, medium and long term priorities for future wind energy related R&I topics. Delivery in month 9 (September 2016)

Introduction to Work Package 1

The latest SRA/MDS for wind energy was published in 2014. It identified the necessary R&D actions needed to contribute to the reduction of the Levelised Cost of Energy (LCoE) of onshore wind in order to reach full competitiveness compared to conventional power generation by 2020, and for offshore wind energy, to reach full market integration by 2030 without the need for incentives.

Wind energy has developed steadily towards meeting these targets. Onshore wind is already competitive compared to conventional power generation in some parts in Europe¹, and offshore wind is on its reducing costs on accelerated path to the targets posed to 2020.

The targets in the SRA/MDS were established under the Strategic Energy Technology Plan (SET-Plan), the EU's blueprint for developing low carbon energy technologies. At the time of its launch, in 2007, the SET-Plan identified

¹ <https://www.bnef.com/dataview/new-energy-outlook/index.html>

wind energy as a strategic energy technology that contributes to all of the EU's energy policy 2020 objectives: increased competitiveness, energy security and fighting climate change.

Following the adoption of the communication on Energy Technologies and Innovation, COM(2013)253² and the Conclusions of the European Council of 22 May 2013, the European Commission initiated an update of its energy research and innovation (R&I) policy, the SET-Plan.

The SET-Plan Integrated Roadmap together with the Action Plan were the first key actions of the EC's Communication on Energy Technologies and Innovation. As part of the implementation actions of the SET-Plan, seven roadmaps on low carbon energy technology were proposed. These roadmaps put forward concrete action plans aimed at raising the maturity of the technologies to a level that will enable them to achieve large market shares during the period up to 2050³.

The Integrated Roadmap consolidated the updated technology roadmaps and proposed research and innovation actions designed to facilitate integration along four dimensions: the innovation chain, the value chain, the EU dimension and the energy system⁴.

On 15th September 2015, The European Commission adopted the new Strategic Energy Technology (SET) Plan. The upgraded SET Plan is the first research and innovation deliverable on which the fifth dimension of the Energy Union will be built.

The Energy Union aims at positioning the EU as the World's number one in renewables. Hence, both the SET-Plan IR and the SRA/MDS need monitoring and updating according to this new level of ambition. An assessment of the level of implementation and status of key R&I actions and priorities in the wind energy industry will therefore contribute to the achievement of the R&I dimension of the Energy Union.

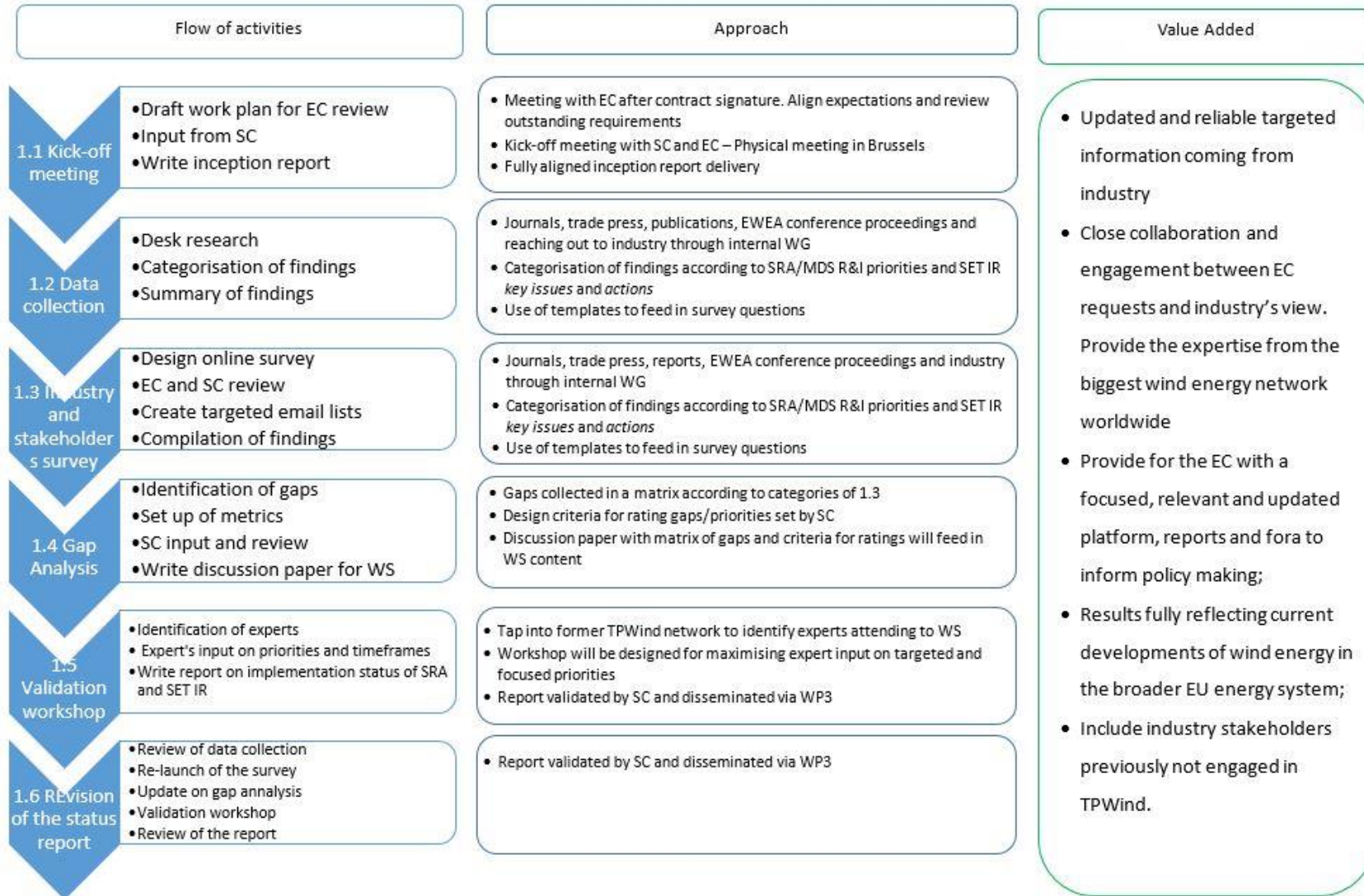
EWEA proposes carrying out this assessment in five phases:



² <https://setis.ec.europa.eu/set-plan-process/integrated-roadmap-and-action-plan>

³ <https://setis.ec.europa.eu/implementation/technology-roadmap/the-set-plan-roadmap-on-low-carbon-energy-technologies>

⁴ <https://setis.ec.europa.eu/set-plan-process/integrated-roadmap-and-action-plan>



	ACTIVITY	OUTCOME	DELIVERABLE
1	Kick off meeting	Detailed work plan and timeline for work package 1	Deliverable D1.1: Inception report –
2	Data collection	Initial overview of RD&I priorities implementation wind community stands on RD&I.	Contribution to Status report, deliverable D1.2 and updated Status report, deliverable D1.3
3	Stakeholders' involvement: survey	RD&I priorities implementation	Contribution to Status report, deliverable D1.2 and updated Status report, deliverable D1.3
4	Gap analysis	Gap analysis	Contribution to Status report, deliverable D1.2 and updated Status report, deliverable D1.3
5	Stakeholders' validation: workshop	Final identification and prioritisation of RD&I issues	Contribution to status report, deliverable D1.2

Table 1 List of WP1 activities, outcomes and deliverables

The initial assessment will build on the research categories outlined in the Strategic Research Agenda from 2014.

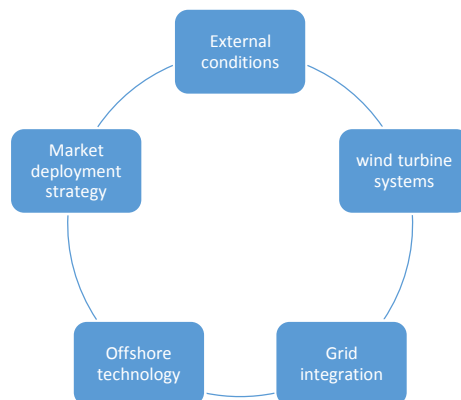


Figure 2 SRA 2014 main priorities

In addition, EWEA will:

- factor in current developments of wind energy in the broader EU energy system;
- provide for focused, relevant and updated reports and fora for the Commission to gain input to inform policy making;
- include industry stakeholders previously not engaged in now ceased TPWind.

Kick-off meeting (task 1.1)

EWEA will organise a kick off meeting in month 3 with the Steering Committee to present and discuss with a draft work plan for Work Package 1 activities. This draft plan will be prepared by the operational EWEA team and the project manager and will be reviewed by the Work Package Leader.

The draft will contain the scope, a proposed timeline for execution of all tasks under Work Package 1, a list of sources of information and contacts planned to be used to perform the data collection and an initial plan of communication and dissemination activities (linked to WP 2 + WP 3).

The kick-off meeting should include a brainstorm on further potential focus areas for the implementation assessment of the SRA/MDS and the SET Plan IR. The SC will also provide input to the methodology proposed for data collection and for the stakeholder questionnaire.

The format chosen for the kick-off is a physical meeting in Brussels in March 2016. The EC is invited to join the kick off meeting so that it can help shape the stream of work itself.

Data collection (task 1.2)

An initial assessment on the level of implementation of current RD&I priorities will be performed through desk research beginning in month 2 (February 2016). EWEA will use scientific journals and its internal library, trade press, paid data services and public data over the internet. In addition, EWEA has access to hundreds of conference proceedings, presentations and posters of EWEA's conferences and exhibition events. This information is available for more than 10 years back, but files only from 2014 to date will be used to guarantee the most updated information.

EWEA will also pay attention to the released reports on R&I developed at both national and European level e.g current EU funded projects, JRC reports etc.

Additionally, EWEA will reach out to its formal networks such as the IEA Implementing Agreement on Wind and draw on results from IRPWind project. An additional source of information in this task will be EWEA's relevant working groups:

- Working Networks and its Task Force on grid connection requirements
- Working Group Offshore Wind and its Task Force on regulatory barriers (for offshore wind)
- Working Group Finance and its Task Force on regulatory barriers (for finance)
- Working Group Stable Frameworks

Finally, EWEA's involvement in several EU funded projects⁵ will be exploited to collect information on various topics such as wind energy grid and electricity market integration, social acceptance and environmental impact, and offshore wind logistics.

EWEA's BI experts will gather and summarise the information to give an initial overview of where the industry stands on RD&I and the challenges that lie ahead in the short, medium and long term.

Findings will then be formalised in a template, which will 1) form the basis for the stakeholders' online survey and 2) will provide a comprehensive matrix to be integrated with the survey's inputs. The Steering Committee will evaluate the quality and content of the data collected and sign off.

Industry and academia survey (task 1.3)

Sensitive, confidential and up-to-date data on RD&I may not be possible to be retrieved through the previous activity, therefore gaps shall be filled in through direct anonymous consultation with industry and academia. EWEA will provide for a non-disclosure agreement to participants accepting providing input to the questionnaire if needed.

The aim of the questionnaire will be to:

- Assess the level of implementation of current RD&I priorities identified in the SRA and
- Give input and direction as for future priorities, i.e. issues the industry and the wind energy network see as relevant for the development of the technology in the different time spans.

For this survey, wind energy experts from the industry, research and academia will be engaged through a set of questions addressing both the level of implementation of current RD&I priorities and selection of future priorities for wind energy's development in the different time horizons.

As soon as the data collection finishes, EWEA will design the online survey from the preliminary conclusions of the data review. The design of the questionnaire will be checked with the ETIP SC who can advise on the content, length, and style. An initial set of questions covering all high-level relevant areas from the SRA will be suggested. These answers will be then input to the matrix already entailing results from the data collection process.

The survey will be prepared, coordinated by Operational Group 1 and set-up online by the Operational Group 2, this task will be performed between month 3 and 4 (March and April 2016).

⁵ IRPWIND, LEANWind, WisePower, Market 4RES, ReserviceS, EERA-TOC, e-Highways 2050, INNWIND.EU.

EWEA will produce a targeted mailing list taking as point of departure the members of the 5 Working Groups of the ex-Technology Platform for Wind (the former platform). The analysis from the questionnaire will make the basis for the final review of the SRA implementation (delivered in month 9 (September 2016)) as well as serve to define the topic for discussion on the workshops being carried out in WP 3 of this tender.

Gap analysis (task 1.4)

This task will analyse the results coming from the data collection and stakeholder survey. Also it will identify gaps in RD&I for the preparation of the report in task 1.6 on Short, Medium and Long term priorities for RD&I in the wind energy sector.

Each priority/issue/action gap will be identified and quantified. EWEA will design a matrix to provide ratings of each finding according to their degree of implementation. The criteria for the rating will be decided by the ETIP SC, but it could be based on the number of years that industry/stakeholders have invested in research the topic and or based on Technical Readiness Levels (TRLs). The Steering Committee will validate this analysis and if required, additional stakeholders could peer-review the results.

A discussion paper with results from the gap analysis will be provided as input to the stakeholders' validation workshop. The paper will set the scene for the discussions and will outline the input needed from participants during the workshop. The matrix with the gap analysis results and rating criteria will be included in the annex of the paper. Stakeholders are expected to review and validate initial ratings provided by SC.

This activities under this task is planned to begin in month 5 (may 2016) and will mainly be carried out by the Operational Group 1 (Business Intelligence team in EWEA).

Validation Workshop (task 1.5)

EWEA will organise a stakeholder workshop with a group of experts who will be invited to a physical meeting in Brussels by beginning of month 6 (June 2016) aimed at validating the results of the gap analysis and to provide for input as regards of future wind energy RD&I priorities. The Validation Workshop is expected to be part of deliverable 3.1 Workshop on input to Horizon2020 Eenergy Work Programme 2018 – 2020. .

Participants will be selected from a pool of stakeholders including the former TPWind members according to their different field of expertise.

- Number of participants is expected to be 100 individuals divided on 3-4 different fields of expertise
- Sector they represent is expected to be leading technological representatives of the industry, and academia reporting directly to the C-level of their company/institution.

Results of gap analysis will be submitted to the participants prior to the meeting and they will be asked to provide their view on 1) the relevance of the gaps identified and 2) research priorities needed to tackle the gaps and 3) the time frame of each of priority. The outcome will consist of a list of priorities divided per level of relevance and time frame.

The SC will validate this results ahead of writing the first report on the implementation status of the SRA/MDS and the SET Plan IR. It will identify R&I priorities for the short, medium and long term for the wind sector in Europe. This report will be prepared by the Business Intelligence experts of EWEA starting from month 5 (May 2016), and will be approved by the Steering Committee prior to its publication in month 9 (September 2016).

ETIP Wind Steering Committee (SC)

ETIP Wind SC will be actively involved in two deliverables in this Work Package. For each deliverable ETIP secretariat will provide initiating work where after the ETIP Wind SC will be invited and encouraged to define, advice, comment and correct on the deliverables.

The essential communication, collaboration and coordination between ETIP Wind secretariat and ETIP Wind SC are listed below:

D.1.2 Status report on the implementation of the SRA and the SET-plan Integrated Roadmap

Activity	Likely date of execution	Task
Kick-off meeting	7 March 2016	Task 1.1
Industry and academia survey	Released in April 2016	Task 1.3
Validation Workshop, delivering input to the Horizon 2020 Energy Programme 2018 – 2020	3 rd June 2016	Deliverable 3.1