

ETIPWind Steering Committee Online meeting

Welcome & Introduction

Objectives of the meeting

- To agree on the methodology to develop the Gap analysis
- To establish the Working Groups who will work on the Gap analysis
- To discuss the ETIPWind collaborations for Q1 2023

Agenda

10:00-10:15	Welcome & Overview of Q1 activities + IEA event
10:15-10:30	EU priorities in 2023
10:30-11:15	Methodology to develop the Gap analysis <ul style="list-style-type: none">• Purpose of the document• What the Secretariat will provide• Role of the Working Groups• Expected output <i>Inc. 15mn Q&A</i>
11:15-11:30	Establishment of the Working Groups for the Gap analysis
11:30-11:45	ETIPWind collaborations and involvement of SC members <i>Inc. discussion on CETPartnership 2023 call module</i> <i>Inc. Technical Workshop with ESTEP</i>
11:45-11:55	2023 Calendar of meetings
11:55-12:00	Conclusion and next steps

Overview of Q1 activities

- **January – March:** Elaboration of the **Gap analysis**
- **January:** Collaboration with **CETPartnership**
- **End of January:** Communication about the **revised SET-Plan**
- **February:** Collaboration with the **Clean Steel Partnership**
- **February:** Start the work on the **NECPs analysis**
- **End of February:** Answer to the consultation on the **Horizon Europe's strategic plan**
- **Meetings:**

Steering Co meeting	Gap Analysis	12 January	Online	/
SC Working Groups Gap Analysis	Regular meetings	February – April	Online	/
SC + IWG meeting	Definition methodology NECPs analysis (establishment of a joint Task-Force?)	Mid-February	In-person?	Brussels?
Steering Co meeting	Gap Analysis + preparation of the SC+CTOs Forum	End March	Online	/

EU priorities in 2023

Wind industry's priorities



**EU Long-term electricity
market design reform**

**Grid build-out and
energy system
integration**

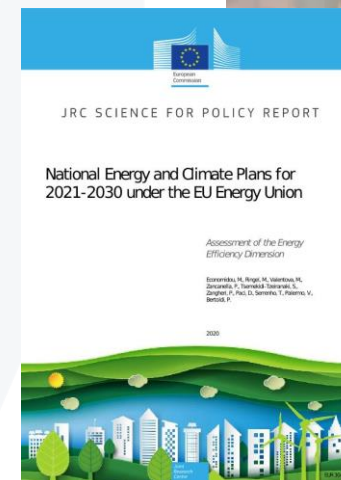
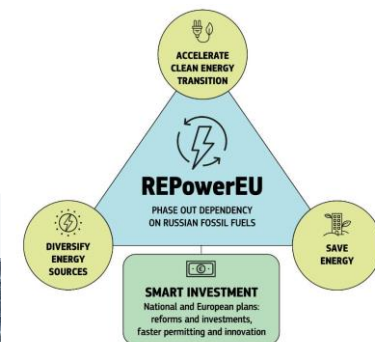


Supply chain competitiveness

- Funding for expanding
- Raw materials access
- Permitting
- Technology development

EU political priorities in 2023

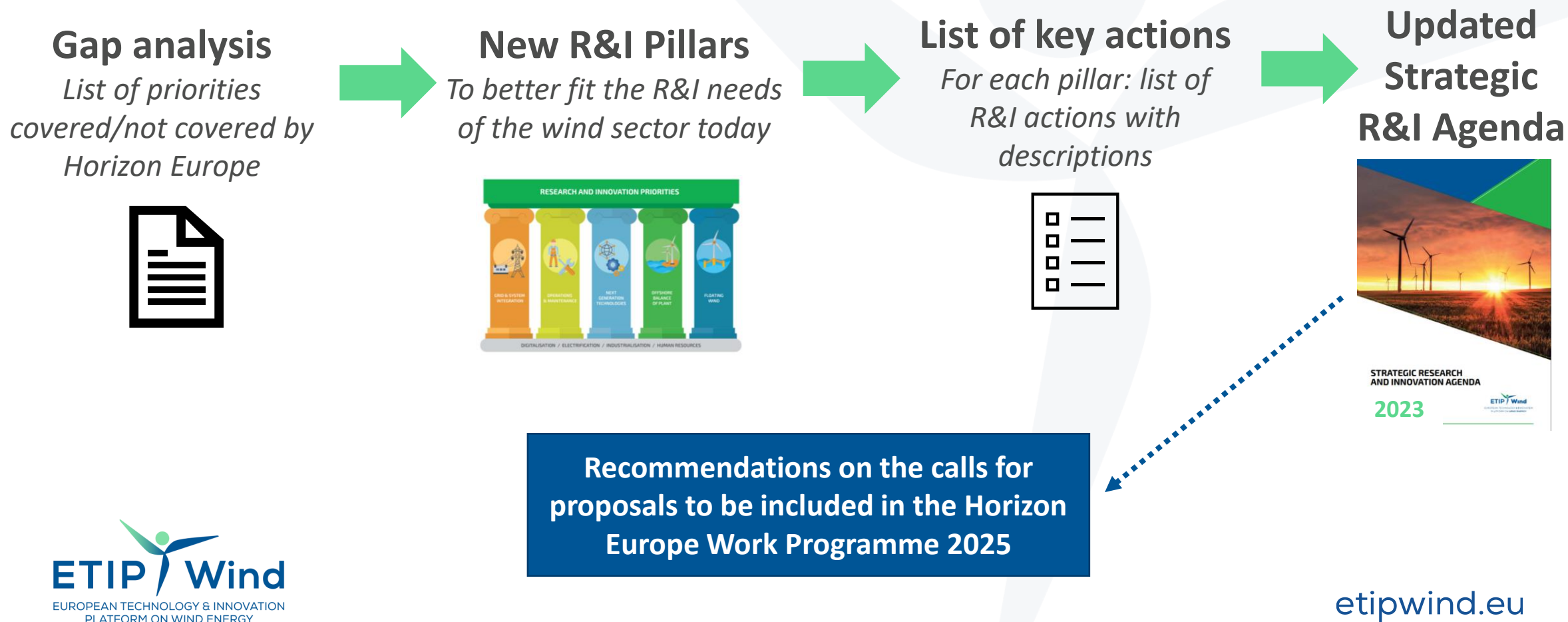
- Clean Tech Europe
- EU Raw Materials Act
- Completion of **Fitfor55** and **REPowerEU** trilogues
- Hydrogen and Gas Package
- State aid rules
- Revised **National Energy Climate Plans** assessment



Methodology to develop the Gap analysis

Purpose of the Gap analysis

➤ Gap analysis = 1st step to update the ETIPWind Strategic R&I Agenda



Proposed methodology

- Gap analysis will include:
 1. **Qualitative assessment of Horizon Europe topics** (WP2021-22 projects + WP2023-24 calls) to check if they addressed our **Roadmap priorities**
 2. For the **Roadmap priorities that have not been addressed** by Horizon Europe : do we still need funding on these points?
 3. **Additional priorities** that we see as urgent topics today and that were not considered in the 2019 Roadmap or in Horizon Europe.

Proposed methodology – Part 1.1



HEU WP2021-22

HEU WP2023-24

Pillar 1 Grids and System integration	Short-term	Integrated forecasting of power production demand	
		Short-term energy storage	
		Long-term energy storage	
		Multi-cultured windfarms	
		Modelling future system needs	
	Medium-term	Optimising transmission infrastructure	
		Quantification of system services	
		Sustainable hybrid solutions	
	Long-term	Stable system with 100% RES	
Pillar 2	...		
Pillar 3	...		
Pillar 4	...		
Pillar 5	...		



What the Secretariat will provide

HEU WP2021-22

- List of granted EU projects for the WP2021-22, their focus.
- Preliminary assessment made by the Secretariat on whether the objectives of the projects address our Roadmap priorities.
- Check and qualitative assessment made by Steering Committee (in WGs)

Project	HEU Call	Description	Pillar addressed	Research action addressed	Qualitative assessment	Comments
Blades2Build	HORIZON-CL5-2022-D3-01	Recycle, Repurpose and reuse end-of-life wind blade composites – A coupled pre- and co- processing demonstration plant	3. Next Generation Technologies	-Blade recycling demonstration -Recycling methods for materials and components	<div><div>Totally addressed</div><div>Partially addressed</div><div>Not addressed</div></div>	<i>The priority has been addressed but we still need funding for sustainability by design in this area.</i>

Proposed methodology – Part 1.2

			HEU WP2021-22	HEU WP2023-24
Pillar 1 Grids and System integration	Short-term	Integrated forecasting of power production demand	✗	✓
		Short-term energy storage	✗	✓
		Long-term energy storage	✗	✓
		Multi-cultured windfarms	✓	✗
		Modelling future system needs	✗	✗
	Medium-term	Optimising transmission infrastructure	✗	✗
		Quantification of system services	✓	✗
		Sustainable hybrid solutions	✗	✓
	Long-term	Stable system with 100% RES	✗	✗
Pillar 2	...			
Pillar 3	...			
Pillar 4	...			
Pillar 5	...			

What the Secretariat will provide

HEU WP2023-24

- List of wind-related calls in WP2023-24 (inc. grids).
- Preliminary assessment made by the Secretariat on whether the scope of the calls match our Roadmap priorities.
- Check and qualitative assessment made by Steering Committee (in WGs)

HEU Call	Title	Pillar addressed	Research action addressed	Qualitative assessment	Comments
HORIZON-CL5-2024-D3-02-09	Demonstrations of innovative floating wind concepts	5. Floating wind	-Validation of design tools -Mooring and anchors -Dynamic electric cables	<div><div></div> Totally addressed <div></div> Partially addressed <div></div> Not addressed</div>	<i>The priority will not be totally addressed by this call. The scope does not include enough activities on dynamic cables. This is a priority today because...</i>

Proposed methodology – Part 2

Pillar 1 Grids and System integration	Short-term	Integrated forecasting of power production demand
		Short-term energy storage
		Long-term energy storage
		Multi-cultured windfarms
		Modelling future system needs
	Medium-term	Optimising transmission infrastructure
		Quantification of system services
		Sustainable hybrid solutions
	Long-term	Stable system with 100% RES
Pillar 2	...	
Pillar 3	...	
Pillar 4	...	
Pillar 5	...	

HEU WP2021-22

HEU WP2023-24

×	✓
×	✓
×	✓
✓	×
×	×
×	×
✓	×
×	✓
×	×

Do we still need
funding on
those topics?
Why?

Proposed methodology – Part 3

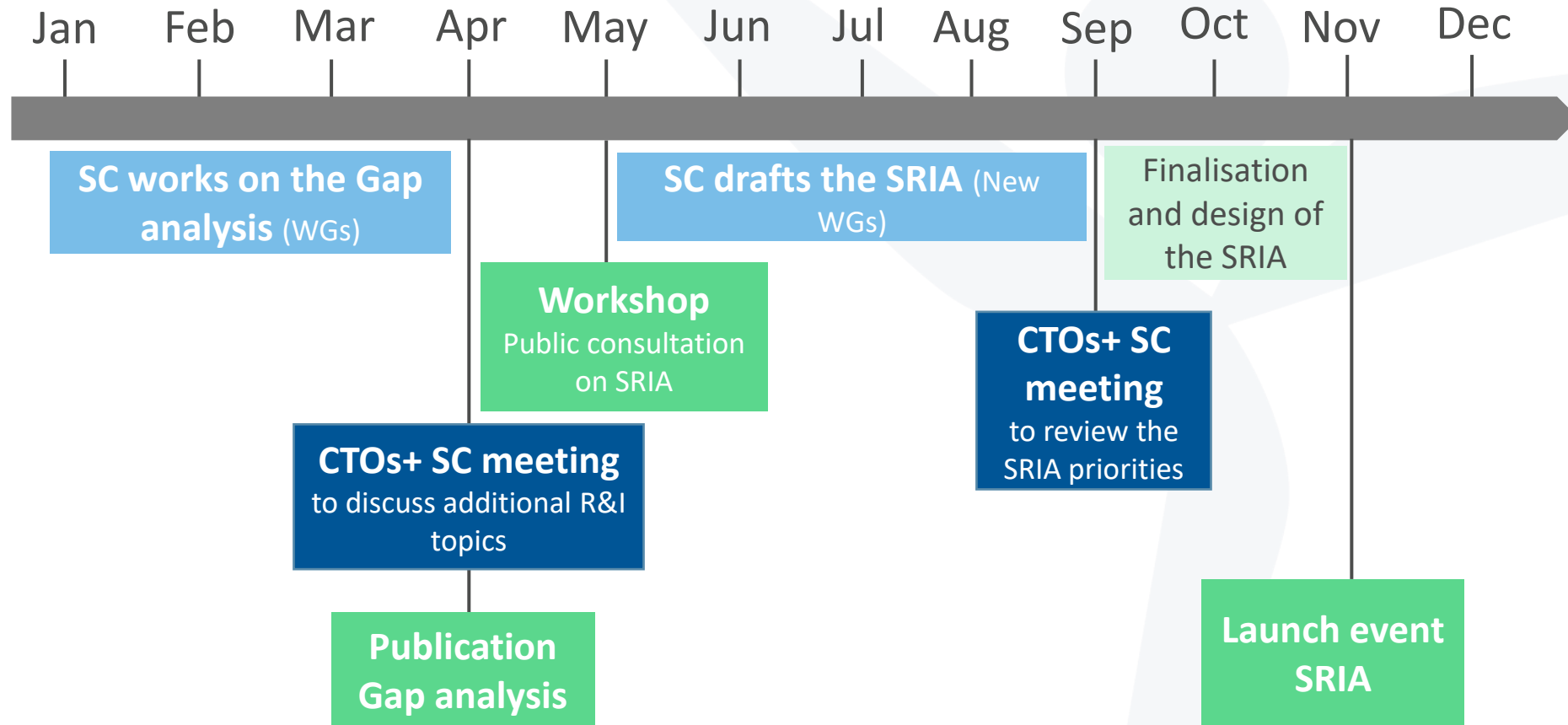
Once the analysis is done:

- CTOs Forum will assess if there are **any additional priorities that urgently need investment** (topics not mentioned in our 2019 Roadmap).

Role of the Working Groups

- **One Working group** dedicated to each pillar of the Roadmap 2019.
- Each Working group will do the **qualitative assessment** of the priorities covered or not by Horizon Europe.
- **Outcome** = one paragraph per action to summarise the assessment of the Working Group.
- WGs will have **separate meetings** to perform the assessment.

Timeline Gap analysis + SRIA



Establishment of the Working Groups

Gap Analysis Working Groups

- Voluntary basis.
- Each WG needs a **Leader or several Leaders**.
- The Secretariat will **support** in the organisation of meetings.
- Please register yourself on the **Teams [registration file](#)**.

Pillar 1: Grid &
System integration

Pillar 2: Operations
& Maintenance

Pillar 3: Next Generation
Technologies

Pillar 4: Offshore
balance of plant

Pillar 5: Floating
wind

Leader:	Leader:	Leader:	Leader:	Leader:

ETIPWind collaborations and involvement of SC members

Collaboration with the Clean Energy Transition Partnership



- Bilateral call on 17/01 (11:00-12:00)
- For their 2023 call: they'd like to develop a call on **"Offshore wind, HVDC and energy islands"**.
- **Preliminar headlines:**
 - *the application of transmission technologies (like HVDC) to energy islands (both onshore and offshore) to connect them to the overall energy system*
 - *fostering DC technology, in terms of enabling tools such as monitoring, control, measurement and management tools, methodology and applied methodology, from the computer to the facility*
 - *the possibility of onsite work together with real plants and existing energy islands*
- Preparation call tomorrow at 13:00.

Collaboration with ESTEP / Clean Steel Partnership

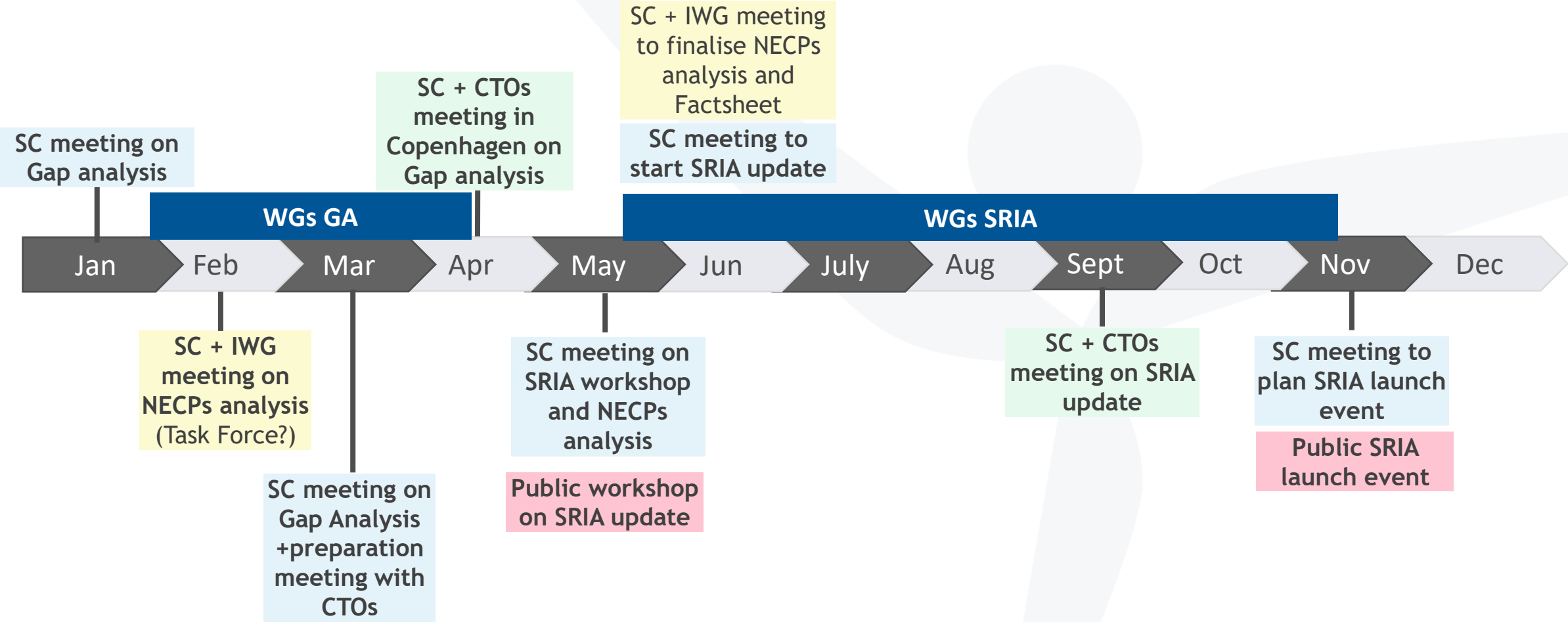


- Meeting between **ESTEP (European Steel Technology Platform) / Clean Steel Partnership** and **ETIPWind**.
- **Online or in-person meeting** in February.
- Preliminary agenda:

0:30	Introductory presentations by ESTEP and ETIPWind on scope and priorities
1:00	ETIPWind to lead conversation on the wind industry's challenges and steel demand (volumes, types, trends); perspectives on circularity and green steel
1:00	ESTEP to lead conversation on the steel industry's perspective on these topics
0:30	Final discussion and agreeing on next steps

2023 Calendar of meetings

ETIPWind meetings 2023



ETIPWind meetings 2023

Steering Co meeting	Gap Analysis	12 January	Online	/
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SC + IWG meeting	Definition methodology NECPs analysis (establishment of a joint Task-Force?)	Mid-February	In-person?	Brussels
Steering Co meeting	Gap Analysis + preparation of the SC+CTOs Forum	End March	Online	/
SC+CTOs meeting	Additional R&I topics for Gap analysis	End April	In-person	Copenhagen
Steering Co meeting	SRIA update and NECPs analysis	Beginning May	Online	/
Public workshop	Consultation on SRIA priorities	End of May	In-person	Brussels
SC + IWG meeting	To finalise NECPs analysis + Factsheet	End of June	Online	/
Steering Co meeting	To launch the SRIA writing (establishment of new Working Groups)	End of June	Online	/
SC Working Groups SRIA	Regular meetings	June-September	Online	/
SC+CTOS meeting	Review of the SRIA priorities	September	In-person	Amsterdam
Steering Co meeting	To plan the SRIA launch event	Beginning November	Online	/
Public SRIA event	To launch the document	End November	In-person	Brussels

Conclusion and next steps

Conclusion and Next steps

- **Next meeting:** SC + IWG Wind to define a methodology for the NECPs analysis **mid February.** *(still to be confirmed)*
- **Save the Date for the CTOs + SC meeting** in Copenhagen: **27 April (10:00-13:45)** + perhaps a visit of LM's premises on 28 April.
- Teams repository: **Common calendar for external events**
Channel to share any relevant news

THANK YOU

Contact: secretariat@etipwind.eu