

ETIPWind Steering Committee Online meeting



Welcome & Introduction

Objectives of the meeting

- To discuss preliminary conclusions from the Gap analysis
- To finalise the agenda of the CTOs + Steering Co meeting in Copenhagen
- To agree on the next steps to update the Strategic R&I Agenda

Agenda

10:00-10:10	Welcome & Introduction (<i>inc. update Q1 activities and Vice Chair position</i>)
10:10-10:20	EU policy update (<i>Net-Zero Industry Act and Market Design reform</i>)
10:20-11:40	Preliminary conclusions from the Gap analysis <i>Reminder methodology and objective – 5mn</i> <ul style="list-style-type: none">• <i>WG1 – 10mn (presentation + discussion)</i>• <i>WG2 – 10mn (presentation + discussion)</i>• <i>WG3 – 10mn (presentation + discussion)</i>• <i>WG4 – 10mn (presentation + discussion)</i>• <i>WG5 – 10mn (presentation + discussion)</i>• <i>WG6 – 10mn (presentation + discussion)</i> <i>Next steps and material for CTOs – 15mn</i>
11:40-11:50	Coffee break
11:50-12:05	ETIPWind Steering Committee + CTOs meeting in Copenhagen (<i>agenda, participants list, etc</i>)
12:05-12:35	Next steps to update the Strategic R&I Agenda <i>Proposed methodology + discussion</i>
12:35-12:45	Outcomes of the online workshop with ESTEP
12:45-13:00	Conclusion and next steps (<i>inc. NECPs analysis with IWG Wind</i>)

Update Q1 activities

- Elaboration of the **Gap analysis** -> **January – March**
- Collaboration with **CETPartnership** -> **input on the scope of their call on DC technologies**
- Collaboration with **ESTEP** -> **Workshop on green steel on 13 March**
- Answer to the consultation on the **Horizon Europe’s strategic plan** -> **Position paper submitted.**
- Work on the **NECPs analysis** -> **pending, IWG Wind will start the work.**

- **Meetings:**

Steering Co meeting	Gap Analysis	12 January	Online
SC Working Groups Gap Analysis	Regular meetings	February – April	Online
Steering Co meeting	Gap Analysis + preparation of the SC+CTOs Forum	23 March	Online
SC + IWG meeting	Discussion NECPs analysis	Postponed	Online

Thank you Susanne for your contribution to ETIPWind!



2nd Vice-Chair replacement

- A Vice-Chair position is vacant.

Any volunteer?

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EU Net Zero Industry Act



- ❑ **36 GW target** for annual wind turbines production
- ❑ Governments mandated to use up to 30% **non-price criteria** in auctions:
 - Environmental Sustainability
 - Innovation
 - Energy System Integration
 - Supply chain resilience

BUT carve-outs if costs increase more than 10%
- ❑ **No Funding / Financing** announcements
 - These are left for the EU Sovereignty Fund
 - EU Innovation Fund not reshaped to support wind supply chain
 - Flexible EU State aid rules can help in the short-term only with CAPEX support

EU Critical Raw Materials Act



- ❑ Strict focus on **raw materials** e.g. rare earths, copper, lithium
 - Glass fibre fabrics / steel not in
- ❑ **2030 targets** for:
 - Mining capacity = 10% EU's annual consumption
 - Processing capacity = 40% EU's annual consumption
 - Recycling capacity = 15% EU's annual consumption
- ❑ Progressive approach to min. recycled content for **permanent magnets**
- ❑ Fast permits and easier financing for **Strategic Raw Materials Projects** in Europe or third countries

Market Design proposal: what it says

- ✓ No possibility for ad-hoc national revenue caps
- ✓ No changes to existing support schemes
- ✓ 2-sided CfDs become norm for State aid
- ✓ Fast forward on PPAs incl. via combination with CfDs
- ✓ Merchant remains available to investors
- ✓ Transmission access guarantee for offshore wind included

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Reminder on the 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 and that were not considered in the 2019 Roadmap or in Horizon Europe.

In Copenhagen

Reminder on the methodology

- **6 Working groups** (one / pillar of the Roadmap 2019).
- Each Working group did the **qualitative assessment** of the priorities.
- **Outcomes** = preliminary conclusions summarising the assessment of the Working Group for each pillar of the Roadmap.

Working Group 1

Adrian Timbus

WG1 – Grid & System integration

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Integrated forecasting of power production & demand	Partially addressed	Partially addressed
Short-term energy storage	Partially addressed	Not addressed
Long-term energy storage	Partially addressed	Partially addressed
Multi-cultured wind farms	Not addressed	Not addressed
Modelling future system needs	Partially addressed	Not addressed
Optimising transmission infrastructure	Totally addressed	Partially addressed
Quantification of system services	Partially addressed	Partially addressed
Sustainable hybrid solutions	Not addressed	Not addressed
Stable system with 100% RES	Partially addressed	Partially addressed

WG1 – Grid & System integration

➤ Preliminary conclusions:

- **Modelling future system needs** and **quantification of system services** are the most important priorities (given the current discussion on the Market design). Need funding in the short-term to work with the TSOs and utilities to understand the type of services windfarms will have to provide.
- **Developing technologies** to answer the system needs is the next urgent step:
- **Short-term storage and long-term storage** have been partially addressed by the projects / calls but they are not wind-specifics. Integration of storage technologies in wind farms or grid systems remain high priority (need demonstration projects).
- **Optimising transmission infrastructure** has been covered. Need to wait the results of the ongoing projects. Next step: development of a pan-European plan about infrastructures deployment.
- **Integrated forecasting of power production & demand** is seen as a 2nd priority.
- **Hybrid plants** is not the priority anymore even though Wind + storage plants could be beneficial.
- **Stable system**: Need more focus on Flexibility in the transmission and generation side, hardware solutions, windfarms able to provide ancillary services such as developing grid forming capabilities, development of new converters/systems for provision of system services in the absence of large synchronous generators, etc.

Funding gap: €132m - €179m (+additional topics)

Working Group 2

Lars Landberg

WG2 – Operation and Maintenance

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Lifetime assessment and condition monitoring	Not addressed	Partially addressed
Digital tools for control and monitoring	Partially addressed	Partially addressed
Robotic inspection and repair methods	Not addressed	Partially addressed
Dynamic cable repair solutions	Not addressed	Not addressed
Digital solutions for smart operations	Partially addressed	Partially addressed
Predicting environmental parameters	Partially addressed	Partially addressed
Decommissioning strategies and technology	Not addressed	Partially addressed
Solutions for operating in extreme conditions	Not addressed	Not addressed

WG2 – Operation & Maintenance

➤ Preliminary conclusions:

- There has been some progress as most of the R&I topics have been partially addressed. But some topics still need funding because they are **continuous research topics** (e.g. digital tools for control and monitoring, digital solutions for smart operations).
- Some WP2023-24 calls capture well R&I needs for some topics (e.g. digital solutions for smart operations, lifetime assessment and condition monitoring). But the **calls are too broad** and aim to cover too many aspects with a **very limited budget**.
- 2 topics have not been addressed at all: **dynamic cables and repair solutions** (priority 1, medium-term) and solutions to operate in extreme conditions (priority 2, medium-term)
- **Predicting environmental parameters** is the topic that is the most covered in this area. But R&I funding is still needed because some conditions are still not known in certain areas and conditions are changing constantly.
- Should R&I topics related to digitalisation be funded by a different research program (Digital Europe) or by another Horizon Europe (Cluster 4)? Potential risk: general topic not only focusing on wind.

Funding gap: €95m - €135m (+additional topics)

Working Group 3

Marcin Luczak

WG3 – Next Generation Technologies

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Development and validation of components & materials	Partially addressed	Partially addressed
Blade recycling demonstration	Totally addressed	Not addressed
Integrating wind energy in the surrounding natural and social environment	Partially addressed	Partially addressed
New transportation methods for large components	Not addressed	Partially addressed
Development of sustainable materials	Not addressed	Partially addressed
Standards	Not addressed	Not addressed
Manufacturing processes	Not addressed	Partially addressed
Sensor technologies diagnostics and response	Not addressed	Not addressed
Next generation generators	Not addressed	Partially addressed
Noise reduction	Not addressed	Not addressed
Reliability of components	Not addressed	Partially addressed
Recycling methods for materials and components	Totally addressed	Partially addressed
Disruptive technologies	Not addressed	Partially addressed

WG3 – Next Generation Technologies

➤ Preliminary conclusions:

- **Major focus on the materials, manufacturing and recycling** (5 priorities defined): Development and validation of components & materials, Development of sustainable materials, Blade recycling demonstration, Recycling methods for materials and components, Manufacturing processes
- High priority/short term “**Development and validation of components & materials**” has not been addressed
- **Development of sustainable materials** is one of the most urgent priority for the wind sector today. We need to develop new materials (e.g. replacement of carbon-fibre), to get more recycled materials in the blades and to support circularity by design projects.
- **Blade recycling demonstration** is addressed by 3 demonstration projects. Need to keep investigating on new or less mature recycling processes while keep pushing the development of the market for secondary raw material.
- Some R&I topics have not been addressed at all by Horizon Europe whereas they are still high priorities such as **noise reduction, sensor technologies diagnostic and response, development and validation of components and materials**.
- Most of the **Horizon Europe calls are too broad** to ensure the relevant R&I aspects will be addressed.
- **Acceptability and coexistence measures** need a more specific focus and should be better integrated in priorities (Pillar 6?).
- **Reliability of components, next generation generators and disruptive technologies** are also important priorities that have been partially addressed for now.

Funding gap: €75m - €115m (+additional topics)

Working Group 4

Wouter Dirks

WG4 – Offshore balance of plant

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Data availability and sharing	Not addressed	Partially addressed
Serial production - analysis of substructure production processes	Not addressed	Not addressed
Cabling and connections	Partially addressed	Partially addressed
Material durability and protection	Partially addressed	Partially addressed
Cross-industry agreement and standards	Not addressed	Not addressed
Integrated optimised design plan	Not addressed	Partially addressed
Verification of methods and procedures	Not addressed	Partially addressed
Supply chain logistics (decommissioning)	Not addressed	Partially addressed

WG4 – Offshore balance of plant

➤ Preliminary conclusions:

- Some R&I topics remain key priorities in the context of lifetime extension and minimisation of environmental impact. E.g. **cabling and connections, verification of methods and procedures and supply chain logistics (decommissioning)**. But new research actions more technology oriented should be defined (e.g. noise reduction, etc).
- The **scope of the calls is too broad** and address partially the Offshore balance of plant topics with a very limited budget. E.g. verification of methods and procedures needs a **dedicated call on integrated verification of models** for the balance of plant and turbine.
- **Data sharing and availability** is still important topic but has a lower priority because it depends on market readiness to share data.
- Some topics are not relevant anymore as stand-alone topics (e.g. serial production – analysis of substructures, cross-industry agreements and standards). For serial production: funding should be more directed to **technologies that enable serial production** (e.g. optimised manufacturing processes)
- **Additional R&I priorities** identified:
 - Defining solutions helping extending the service life.
 - Integrating windfarm in the balance of plant
 - Lifetime extension via the optimisation of materials to minimise the impact.
 - Interaction with other communities (e.g. fishing) and the demonstration of the benefits of windfarms.
 - Technology improvements/innovations for the installation phase, new installation methods or processes.

Funding gap: €27m - €44m (+additional topics)

Working Group 5

Benjamin Mauries

WG5 – Floating wind

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Lean production	Not addressed	Not addressed
Validation of design tools	Partially addressed	Partially addressed
Mooring and anchors	Partially addressed	Not addressed
Dynamic electric cables	Partially addressed	Partially addressed
Control methods	Partially addressed	Not addressed
Integrated design process in supply chain	Partially addressed	Not addressed
Floating installation, assembly and heavy maintenance	Partially addressed	Not addressed
Park level control	Not addressed	Not addressed

WG5 – Floating wind

➤ Preliminary conclusions:

- **Lean production** is the highest priority and has not been addressed. Need funding especially for manufacturing tools development, mass-production solutions and high productivity tools, standardisation of transport methods and assembly.
- Some funded projects will partially address the priorities identified but focus on the demonstration of one specific technology. Industry lacks the possibility to make full-scale benchmarks of **design tools, technologies, etc... at full-scale to ensure industrialisation of the most competitive solutions.**
- Validation of design tools is not a priority anymore, we should move to **industrialisation of tools**
- Some calls also partially address the demonstration of innovative concepts, but the **budget is too limited** to test and validate all the different types of technologies the call could cover.
- **Mooring and anchors** and **Dynamic cables** are still important topics that need more mature technologies and standardisation.
- **Integrated design process in supply chain** has been partially addressed but need some tools that could help capturing the full picture.
- **Floating installation, assembly and heavy maintenance** topic, it has been partially addressed but need a bigger focus on operations + major components replacement.
- **Control methods and park level control** need to be tested in real site conditions but the matter is less urgent than the other topics.
- **Additional R&I topics:** Ports infrastructure and integration of bigger size turbines, O&M solutions tested in real environment, testing for new turbines' types and co-existence measures.

Funding gap: €135m - €190m (+additional topics)

Working Group 6

Julia Zilles

WG6 – Skills and human resources

Research area	Horizon Europe WP2021-22 projects	Horizon Europe WP2023-24 calls
Expand and harmonise wind energy teaching in Europe	Partially addressed	Not addressed
Boost wind energy higher education	Not addressed	Not addressed
Joint academia-industry educational programmes	Partially addressed	Not addressed

WG6 – Skills and human resources

➤ Preliminary conclusions:

- **Wind energy teaching in Europe** and **wind energy higher education** are areas that need continuous funding. Especially because required skills are constantly changing because of technology development (e.g. wind energy curriculums, repository of skills needed, mobility of students, etc).
- Wind energy higher education should be addressed via Marie Skłodowska Curie Actions. There are already some ongoing projects on this topic but it needs **continuous funding** (e.g. PhD students)
- Some projects will develop **joint academia-industry educational programmes** (upskilling and reskilling activities, mapping knowledge gap, etc) but they won't only focus on wind energy. Need funding for **wind-specific** but also **multi-disciplinary** educational and training programmes (including SSH).
- Additional R&I topics: **Acceptability** in general should be included in this Pillar, **community engagement activities** and **regulatory issues**, also need research to **better show the direct benefits** of wind projects on the communities (e.g. interaction with economic, cheap electricity).

Funding gap: €30m - €50m (+additional topics)

Next steps and material for CTOs

- We will include today's comments in the excels.
- You will have one week to check preliminary conclusions from all WGs.
- We will send the preliminary conclusions (slides format + excels as annexes) to the CTOs no later than 7 April.
- We'll ask them to share their comments on the analysis + additional R&I priorities before the meeting.
- During the meeting, each CTO will have 3-4 minutes to share their views.

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Draft agenda

10:00-10:05	Welcome & Introduction	Adrian Timbus
10:05-10:25	Keynote speech from the European Commission <i>(focus on the revised SET-Plan and Horizon Europe)</i>	Enrico Degiorgis, DG RTD Paula Pinho, DG ENER (online)
10:25-10:45	Update on ETIPWind activities <i>(inc. 10mn discussion)</i>	Adrian + Secretariat
10:45-11:00	Update on EU funding for wind energy <i>(inc. statistics and next steps for Horizon Europe)</i>	Secretariat
11:00-11:15	<i>Coffee break</i>	
11:15-11:25	Keynote speech on the main challenges for the wind energy sector <i>(to introduce the discussion with the CTOs)</i>	Henrik Stiesdal
11:25-12:45	Review of the Gap analysis and discussion on additional R&I topics <i>(CTOs remarks + discussion with SC)</i>	Moderated by Jacob Edmonds
12:45-12:55	Collaboration with EERA's JP Wind	Ignacio Marti, EERA JP Wind's Coordinator
12:55-13:00	Conclusion and Next steps	Adrian Timbus
13:00-13:45	Networking lunch	

Points to be considered

- Participation for now: **10 CTOs + 28 Steering Co members**
- **Promotion codes to register to WindEurope event** sent to all confirmed participants. Please reach out if you did not receive it.
- **No visit** to LM's Technology Centre due to tight timing.

Agenda

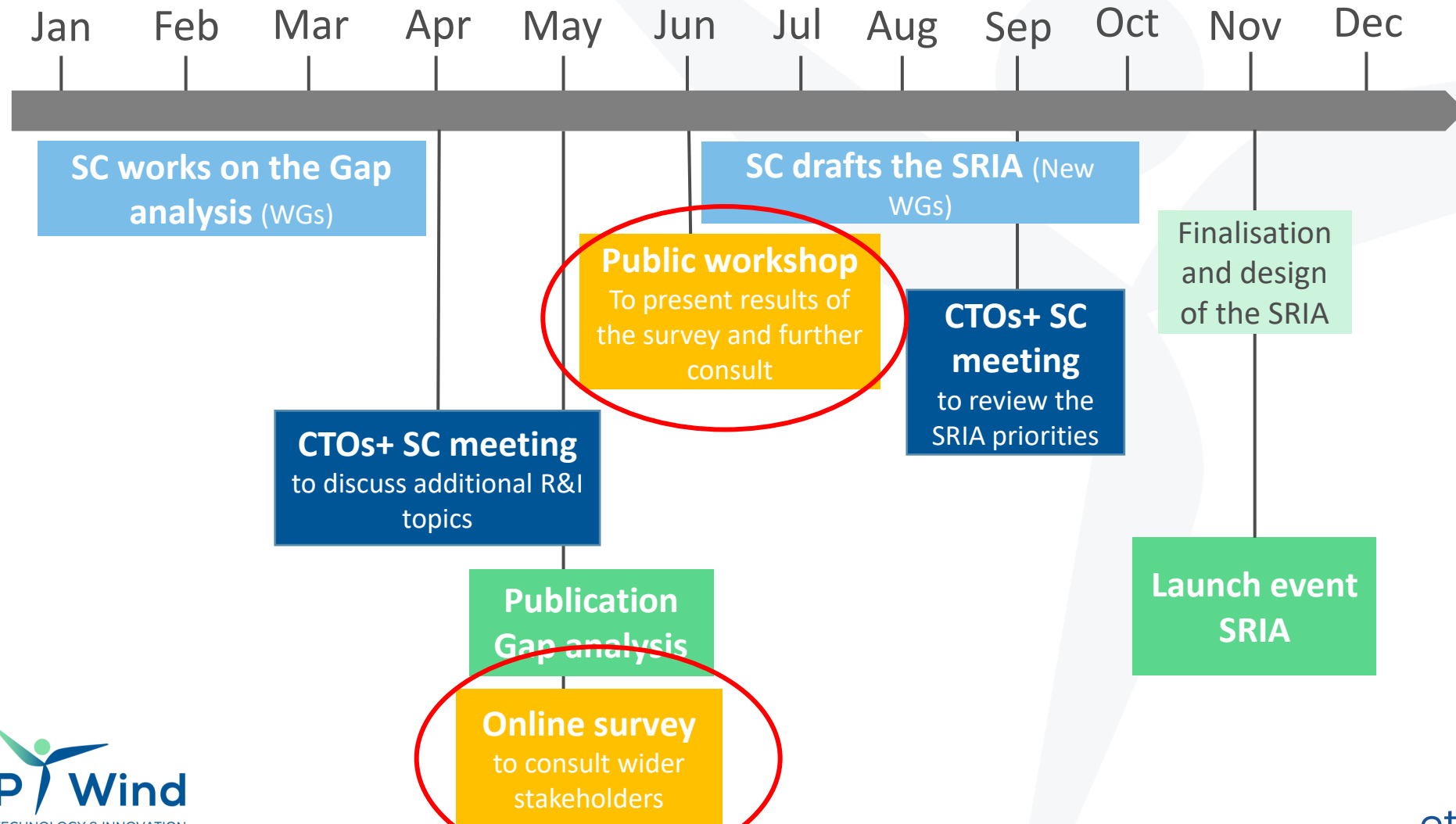
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Purpose of the Gap analysis

- **Objective:** To identify the gaps between Horizon Europe funding and Roadmap priorities.
- **Output:** List of R&I priorities covered / not covered by Horizon Europe with prioritisation and budget estimation.
- List of R&I topics agreed among the **Steering Committee** + reviewed by the **CTOs**.

What about other wind energy stakeholders?

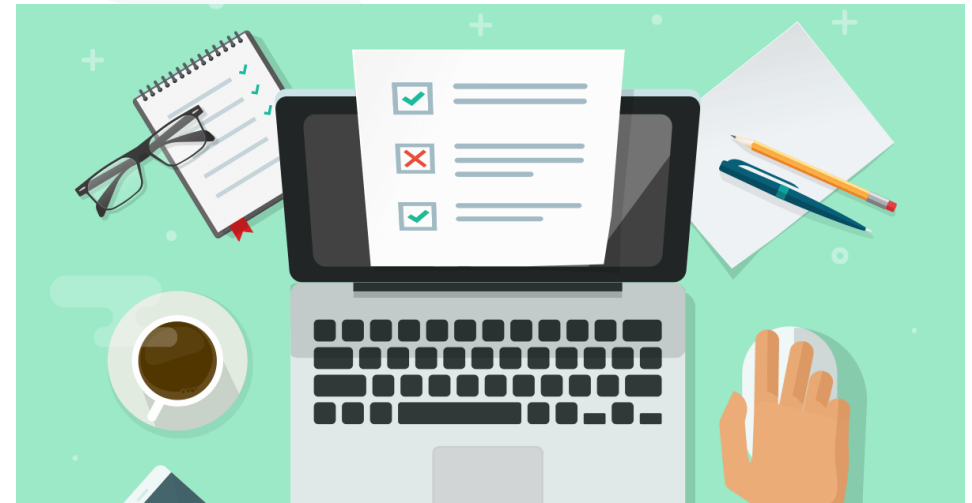
Timeline to update the SRIA



How will we consult wind stakeholders?

1. Online survey:

- **Objective:** to enable all relevant stakeholders to put forward their R&I priorities, to ensure ETIPWind priorities are endorsed by the entire sector.
- **Scope:** R&I topics, timeline, prioritisation, budget
- **When:** 10 May – 9 June
- **Target:** At least 50 answers



How will we consult wind stakeholders?

2. Public workshop:

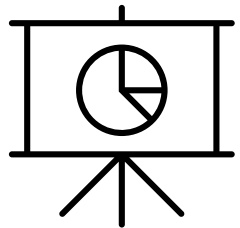
- **Objective:** to present the results of the survey and to have more in-depth discussions on the most urgent priorities, to ensure all stakeholders had a chance to raise their voices.
- **Scope:** Prioritisation, budget
- **When:** end of June (EUSEW 20-22 June)
- **Where:** Online or hybrid
- **Target:** At least 50 participants (inc. EU projects coordinators)



And then?

- Results of the consultation will help us identifying the most urgent priorities and redefine the R&I Pillars.

Public consultation results



New R&I Pillars and new WGs

To better fit the R&I needs of the wind sector today



List of key actions

For each pillar: list of R&I actions with descriptions



Updated Strategic R&I Agenda



STRATEGIC RESEARCH AND INNOVATION AGENDA

2023

ETIP Wind

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Outcomes of the online workshop with ESTEP on green steel



- Meeting between **ESTEP (European Steel Technology Platform)** and **ETIPWind** on **13 March**.
- **47 participants** (9 from ETIPWind, 38 from ESTEP)
- **Key points to be further discussed:**
 - Explore the geographical overlap of steel facilities and wind energy, with a discussion on system integration challenges and H2 valleys.
 - Explore the technical challenges for wind energy to increase the re-use and recycled steel.
 - Explore how to reduce the costs for green steel production.
 - Possible collaboration on standards and certification of green steel use for wind turbines/farms.
 - Discuss possible research actions that could be recommended by either or the two platforms
 - Huge investment needs to convert the steel making plants and where the money should come from
- **Next step:** Public event in-person, June or September 2023.

Clean Energy Transition Partnership calls – ETIPWind's input

- CETP asked the ETIPWind's input on 2 of their 2023 calls:
 - **TRI 1 – Integrated Net-zero-emissions Energy System:** defined a call on “DC technologies for networks”. Budget / project: around **€3m**
 - **TRI 2 – Enhanced zero-emission Power Technologies:** focused on technology breakthrough and improvements for RES. Budget / project: around **€5m**
- The Secretariat will share a list of R&I topics that could be addressed by these calls. We'd like to receive your input on those lists.

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Conclusion and Next steps

- **Review of the Gap analysis conclusions by 31 March** so they can be forwarded to the CTOs **by 7 April**.
- After the CTOs meeting in Copenhagen: **Gap analysis will be finalised and sent to the European Commission.**
- Next step to update the SRIA: **Develop the online survey.**
- **Save the Date:** Steering Committee meeting in Amsterdam on 11-12 September (in parallel of EERA JP Wind's event)

THANK YOU

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