



Steering Committee Online meeting – Minutes 23 MARCH 2023

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1. WELCOME & INTRODUCTION

Adrian Timbus (*Chair of the Steering Committee*) welcomed the participants and opened the meeting with presenting the agenda and the objectives of the meeting:

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

Adrian also updated the Steering Committee on ETIPWind activities for Q1 2023. On the 5 activities scheduled in the ETIPWind work programme, 4 of them were conducted. Only the analysis of the NECPs has been postponed.

Adrian also shared with the Steering Committee the fact that Susanne Nies had to resign from her position of ETIPWind Vice-Chair as she simply left her organisation for a company that doesn't focus on wind energy. Adrian thanked her for her involvement.

He then stressed the fact that the 2nd Vice-Chair position is now vacant and asked for any volunteer to become Vice-Chair of the Steering Committee.

Ignacio Marti (*DTU and Chair of EERA's Joint Programme Wind Management Board*) raised his interest to become Vice-Chair especially to strengthen the alignment between ETIPWind and EERA's JP Wind. He also stressed the fact that it is a perfect timing to strengthen this collaboration since EERA would like to launch an EU Centre of Excellence on wind energy very soon.

Paul McKeever (*ORE Catapult, EERA's JP Wind member*) also volunteered to become the 2nd Vice-Chair of the Steering Committee but he added that he will have to check with his colleagues before. He said he agreed with the argument previously put forward by Ignacio.

Adrian advised Ignacio and Paul to align between themselves and to come back to the Secretariat to propose only one candidate for this position. An online vote will validate the election of the 2nd Vice-Chair. Steering Committee members agreed with this proposal.

2. EU POLICY UPDATE

Ivan Pineda (*ETIPWind Secretariat*) took the floor to brief the Steering Committee about recent EU policy developments.

He first presented the European Commission's proposal for a Net Zero Industry Act including the 36 GW target for annual wind turbine production, non-price criteria auctions, etc. He then introduced the EU Critical Raw Materials Act including 2030 targets in terms of mining, recycling, and processing. He stressed the fact that steel has not been considered as a critical raw material by the European Commission.

Stephan Barth (*ForWind*) asked clarification about the recycled content for permanent magnets. Ivan answered that the target focused on the demand, on the capacity to recycle the permanent magnets.

Ivan finally presented the proposal of the European Commission about the market design reform.

3. PRELIMINARY CONCLUSIONS FROM THE GAP ANALYSIS

Capucine Vannoorenberghe (*ETIPWind Secretariat*) started with reminding the methodology followed to develop the Gap analysis. She explained that 6 working Groups were created to perform a qualitative assessment of the R&I topics addressed or not by Horizon Europe. She then explained that the outcomes from this exercise were preliminary conclusions from each Working Group that will be presented by the Chairs of the Working Groups today.

Working Group 1 – Grid & System integration:

Adrian Timbus presented the preliminary conclusions from WG1. These conclusions are summarised on the slides below.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions:

- Lars Landberg (DNV) said the topic of the forecasting of power production and demand should be better prioritised.
- Paul McKeever (ORE Catapult) said more research should be done on modeling future system needs.

Working Group 2 – Operation & Maintenance:

Lars Landberg presented the preliminary conclusions from WG2.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions:

- Stephan Barth (ForWind) put forward the fact that the calls are too broad and that the process to select the proposals needs to be more transparent. The expected number of projects to be funded is also very important and should not be too high.
- Paul McKeever (ORE Catapult) said that, on the contrary, the calls should not be too much targeted but more in-between.

Working Group 3 – Next Generation Technologies:

Marcin Luczak presented the preliminary conclusions from WG3.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions:

- Adrian Timbus (Hitachi Energy) stressed the fact that manufacturing and recycling should be the main topics in this Pillar. Accelerating the deployment of manufacturing and recycling facilities should be an essential priority.
- Paul McKeever (ORE Catapult) questioned the topic of secondary materials because of the reliability of these secondary materials.
- Arno Wingerde (Fraunhofer) stressed the topic of disruptive / alternative technologies that still need funding.

- Ignacio Marti (DTU) stressed the fact that research is needed to ensure reliability of secondary materials. Manufacturing and recycling should be the main priorities for the next decade at least.

Working Group 4 – Offshore balance of plant:

Wouter Dirks presented the preliminary conclusions from WG4.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions. There was no specific comment from the Steering Committee.

Working Group 5 – Floating wind:

Benjamin Mauries presented the preliminary conclusions from WG5.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions. There was no specific comment from the Steering Committee.

- Adrian Timbus raised the fact that scaling-up is still a key priority for the floating wind sector.

Working Group 6 – Skills and human resources:

Julia Zilles presented the preliminary conclusions from WG6.

Steering Committee members then had the possibility to provide feedback on these preliminary conclusions. There was no specific comment from the Steering Committee.

- Adrian Timbus stressed the fact that a priority for this Pillar is definitely for industry and academia to work closer together to skill up Europe.

John O Tande finally said that a missing point of the discussion was that wind energy will be the backbone of the energy system in Europe by 2050 and we need to ask for radical changes and a significant amount of support.

Capucine Vannoorenberghe closed the discussion by saying that Steering Committee members' comments will be included in the preliminary conclusions. The Steering Committee will then have one week to review these preliminary conclusions before they are sent to the Chief Technology Officers to prepare for the meeting they'll have in Copenhagen.

4. ETIPWIND MEETING IN COPENHAGEN

Capucine presented the agenda of the Steering Committee meeting with the CTOs that will be organised in Copenhagen. She then went through the participants list and asked members of the Steering Committee who have not confirmed yet their participation to do so as soon as possible.

Wouter Haans raised a concern about how the Chief Technology Officers will share their feedback on the Gap analysis conclusions. Adrian answered that it will be important to share the material in advance and to ask them to prepare a short statement so the Steering Committee members can absorb as much information as possible from them.

5. NEXT STEPS TO UPDATE THE STRATEGIC R&I AGENDA

Capucine then presented the next steps to update the ETIPWind Strategic R&I Agenda. She reminded the purpose of the Gap analysis and then introduced the activities that will be launched to consult the wider wind energy community: the online survey and the public workshop. The results from these two consultation activities will then feed the definition of the new R&I priorities.

Steering Committee agreed with these next steps.

Bert Verdyck raised the fact that ETIPWind will need to be clear on the fact that Research & Innovation is needed to accelerate scale-up, industrialisation and deployment.

6. OUTCOMES OF THE ONLINE WORKSHOP WITH ESTEP AND INPUT FOR THE CLEAN ENERGY TRANSITION PARTNERSHIP

Capucine gave the floor to Bert Verdyck to present the outcomes from the online workshop that was organised with ESTEP (European Steel Technology Platform) and the Clean Steel Partnership. He particularly stressed the key points addressed during the workshop and that need further discussion (including overlap between wind energy and steel facilities, integration with hydrogen, reducing the cost of green steel, etc.).

He put forward the fact that the next step will be to organise a public event probably in September 2023.

Capucine then quickly explained that the Clean Energy Transition Partnership asked for ETIPWind's input on their 2023 calls for proposals. ETIPWind will send a list of bullet points with R&I topics that could be addressed within their calls' constraints (limited budget, no demonstration project, etc.).

7. CONCLUSION AND NEXT STEPS

Capucine finally presented the next steps:

- Steering Committee members are invited **to 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: the Gap analysis will be finalised and sent to the European Commission.
- The next step to update the SRIA will be to develop the online survey. The ETIPWind Secretariat will draft it with the support of the Core Team (Chair and Vice-Chairs).
- Steering Committee members were invited to save the date for the Steering Committee meeting that will be organised in Amsterdam on 11-12 September (in parallel of EERA JP Wind's event).

Adrian thanked the participants and closed the meeting.

PARTICIPANTS LIST

Name	Organisation
Adrian Timbus	Hitachi Energy
Antonio Ugarte	CENER
Arnoldus van Wingerde	Fraunhofer
Benjamin Mauries	SAIPEM
Bert Verdyck	ZF
Capucine Vannoorenberghe	ETIPWind Secretariat
Dominique Follut	WEAMEC
Fabio Fugazzotto	ENEL
Frank Bao	RWE
Hanne Wigum	Equinor
Ignacio Martí	DTU
Ivan Pineda	ETIPWind Secretariat
John Korsgaard	LM Wind Power
John Tande	SINTEF
Julia Zilles	EFZN
Lars Landberg	DNV
Marcin Mieczysław Łuczak	Gdansk University of Technology
Mike Anderson	RES
Mikel Sojo Armentia	Acciona
Paul McKeever	ORE Catapult
Peter Eecen	TNO
Stephan Barth	ForWind
Teresa Ojanguren Fernandez	Iberdrola
Tuhfe Göçmen	DTU
Wouter Dirks	Van Oord
Wouter Haans	Shell