



Steering Committee + CTOs meeting – Minutes COPENHAGEN, 27 APRIL 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. He also reminded to the Chief Technology Officers (CTOs) the governance, objectives, and composition of the ETIPWind Steering Committee, as well as the 2023 strategic topics identified by ETIPWind and the purpose of the Strategic R&I agenda.

He then gave the floor to the European Commission for two keynote speeches.

2. KEYNOTE SPEECH FROM THE EUROPEAN COMMISSION

Paula Pinho (*Director “Just Transition, Consumers, Energy Efficiency and Innovation”, DG ENER, European Commission*) started with her keynote speech.

She put forward the REPowerEU Package which paved the way for more legislations. She raised especially the reform of the electricity market which will allow more renewables, protect consumers, and make prices less volatile to short-term signals. The reform also aims to boost Power Purchase Agreements and two-sided Contract for Difference.

But there were developments in the Fit-for-55 legislations too. The Renewable Energy Directive III is being revised and the EU reached a provisional agreement of increasing renewable energy targets from 32% to at least 42.5% by 2030. This will require technology to deliver such as target. On another hand it aims to tackle slow and cumbersome permitting processes.

Paula also stressed the fact that industrial policies need to maintain competitiveness of the EU energy system. Competitiveness will be measured by the access to raw materials. The Green Deal Industrial Plan, including the proposal for a Net Zero Industry Act, tackles these aspects. It aims at scaling-up the manufacturing of renewable energy technologies. It also includes proposals to simplify permitting for manufacturing (one-stop-shops, strategic projects but also skill academies or regulatory sandboxes for innovative technologies).

She finally mentioned the revision of the SET Plan which comes at a very timely moment. She especially mentioned the new Implementation Working Group on High Voltage Direct Current (HVDC) technologies. The new SET Plan will reinforce cooperation between ETIPs and governments especially on key topics such as digitalisation, energy storage, skills or circularity of materials.

Enrico Degiorgis (*Policy Officer, DG RTD, European Commission*) then took the floor. He put forward the manufacturing target of at least 40% included in the Net Zero Industry Act (the EU must have the manufacturing capacity of at least 40% of the EU’s annual deployment needs by 2030). He also explained more in details the proposal for a Critical Raw Materials Act included the fact that EU’s recycling capacity should cover at least 15% of the EU’s strategic raw materials’ consumption.

He then moved to Horizon Europe and explained that the main next step will be the adoption of the strategic plan 2025-2027. This process will close early 2024 and will be followed by the definition of the next Horizon Europe Work Programme 2025. This Work Programme will focus on the urgent needs and some topics that need funding continuity.

3.UPDATE ON EU POLICY CONTEXT AND ETIPWIND ACTIVITIES

Ivan Pineda (*ETIPWind Secretariat*) then took the floor to comment on the changes that the EU policy context encountered since the last ETIPWind's cycle of activities. He stressed again the EU's proposals for a Net Zero Industry Act and the Critical Raw Materials Act. He then reminded the urgent need to step up wind energy installations to achieve EU targets. And the fact that the wind energy sector R&D investment and the EU funding for wind energy R&I decreased in the last years. He ended his presentation by saying that support for wind energy R&I was essential but that wind energy should also be embedded in all the other EU files (e.g. EU environmental policy, permitting, EU industrial policy, EU market design, etc.).

Capucine Vannoorenberghe (*ETIPWind Secretariat*) then updated the CTOs about the ETIPWind activities conducted since its relaunch. These achievements included several meetings with the Steering Committee, with the European Commission, the kick-off event of ETIPWind, ETIPWind's participation to the SET Plan Conference, ETIPWind's position paper on the future of Horizon Europe, etc.

She then gave the floor to Ignacio Marti, coordinator of EERA's Joint Programme on wind energy.

4.COLLABORATION WITH EERA'S JOINT PROGRAMME ON WIND ENERGY

Ignacio Marti (*ETIPWind Vice-Chair of the Steering Committee*) presented the work of EERA's Joint Programme on wind energy and its ambition to build a European Centre of Excellence. He explained that the European Centre of Excellent (EUCoE) will develop a research programme which will help the Joint Programme to have a more strategic way of planning.

The EUCoE will help:

- Tracking wind energy research progress on an ongoing basis through network of members;
- updating the research programme regularly;
- monitoring key projects (EU and national) through members;
- reporting to the European Commission;
- making the case for R&I as needed on progress;
- ensuring wind energy meets 2050 targets.

5.KEYNOTE SPEECH FROM HENRIK STIESDAL

After a coffee break, Henrik Stiesdal (*Founder and CEO of Stiesdal A/S*) delivered a keynote speech about the state of the wind energy industry and how Research and Innovation will help achieving the EU targets for wind energy. He deplored a kind of "arms race" between wind energy manufacturers to always developer bigger turbines whereas the industry needs stability to step-up installations. Europe needs to deploy as fast as China.

A key issue that is related to this fast innovation is the impacts that big rotors can have. This should be a research priority for ETIPWind. Other important topics must be the automation in manufacturing to accelerate the development processes.

Adrian Timbus thanked Henrik Stiesdal for his inspirational speech and opened the discussion with CTOs.

6. DISCUSSION ON ETIPWIND GAP ANALYSIS AND R&I TOPICS 2025-2027

Jacob Edmonds (*ETIPWind Vice-Chair of the Steering Committee*) introduced the discussion by presenting the conclusions from the Gap analysis. He then invited the members of the CTOs Forum to share their feedback on the Gap analysis conclusions but also on the most urgent R&I priorities that should be addressed in the short to medium term to support the competitiveness of the European wind energy sector.

Below are summarised the key points the CTOs shared regarding the conclusions from the Gap analysis.

- Several CTOs thanked the ETIPWind SC members for the clarity of the Gap analysis and its conclusions.
- A key concern was about the high number of priorities not covered by the Horizon Europe programme until now.
- The scope of the calls indeed seemed too broad and included many topics for a limited budget. This should change in the next Horizon Europe work programmes.
- When it comes to R&I needs, it was said that increasing the wind turbine size even more would be counterproductive.
- The scope of the calls is indeed too broad and is sometimes unclear according to some CTOs. The description of the calls should be clearer in the next Horizon Europe work programmes.
- It is very important to identify innovation and technology needs, but another key element is permitting. This has not been included in the Gap analysis because it is not strictly related to R&I but it should be kept in mind.
- The structure of the Working Groups (based on the Pillars of the 2019 roadmap) seems outdated and is too much based on the Levelised Cost of Energy (LCOE) reduction. The main challenge is scalability and this should be reflected in the structure of the new Working Groups.
- Another key point missing from the Gap analysis is the understanding of our ecosystems including environmental barriers but also coexistence with other communities.

In a second part, Jacob asked the CTOs to share their **top-3 R&I priorities** that would have a significant impact on the competitiveness of the European wind energy supply chain. This input will feed the next steps of the ETIPWind Strategic R&I Agenda's update.

The CTOs were invited to note down their top 3 priorities on sticky notes which were hung on the wall to help visualising the R&I priorities (see **Picture 1**).

PICTURE 1

Sticky notes from CTOs



The main R&I priorities mentioned by the CTOs during the meeting are summarised in the table below.

TABLE 1

CTOs feedback on the top R&I priorities for the wind energy sector

Top 1 priorities	Top 2 priorities	Top 3 priorities
Grid system integration	Life Extension towards predictive maintenance	Sustainable materials
Stable 100% based on RES	Supply-chain development	Floating wind
Grid forming	Floating de-risk	Resilience
Flexibility and grid services	Quantification (and definition of system services)	Optimising transmission infrastructure
Digital balance	Human resources	Manufacturing & industrialisation
Forecasting	Supply-chain partnerships (circular economy, local supply)	Transport
Transport of large components (blades)	Energy storage	Permitting
Simulation and testing methods	Sustainable technologies	Hybrid solutions / system integration
Standardisation	Development of right skills (materials, system integration, hybrid experts, huge project execution, etc)	Education and training
Serial / mass production (e.g. floaters)	Align R&I efforts with moving expectations	Data availability
Hybrid projects including storage, Power to X		Technology development (dynamic cables for floating for example)

Jacob Edmonds thanked the CTOs for their feedback and closed the discussion by presenting the timeline for updating the ETIPWind Strategic R&I Agenda.

7. CONCLUSION AND NEXT STEPS

To conclude the meeting, Adrian Timbus thanked the participants for their precious input that will feed the update of the ETIPWind Strategic R&I Agenda. He also informed them about the upcoming ETIPWind activities including:

- the factsheet on the revised National Energy & Climate Plans (in collaboration with Implementation Working Group on Wind energy)
- several meetings with EU policymakers to disseminate ETIPWind's new R&I priorities
- ETIPWind's participation to EUSEW 2023 with other ETIPs (ETIPs Forum)
- a second meeting with the Clean Steel Partnership
- joint activities with other ETIPs and IWGs (e.g. workshop on acceptability)

He then invited the CTOs for a group picture (see **Picture 2**) and closed the meeting.

PICTURE 2

ETIPWind Steering Committee + CTOs in Copenhagen



PARTICIPANTS LIST

Name	Organisation
Adrian Timbus	Hitachi Energy
Aidan Cronin	Siemens Gamesa
Antonio Auguarte	CENER
Arno van Wingerde	Fraunhofer
Belen Linares	Acciona
Benjamin Mauries	SAIPEM
Bert Verdyck	ZF Wind Power
Capucine Vannoorenberghe	ETIPWind Secretariat
Celine Mahieux	Shell
Cesar Yanes	Iberdrola
Dominique Follut	WEAMEC
Enrico Degiorgis	European Commission
Fabio Fugazzotto	ENEL
Frank Bao	RWE
Hanne Wigum	Equinor
Henrik Stiesdal	Stiesdal
Ignacio Marti	DTU
Ivan Pineda	ETIPWind Secretariat
Jacob Edmonds	Orsted
Jochen Kreusel	Hitachi Energy
Joerg Scholle	ENERCON
John Korsgaard	LM Wind Power
Julia Zilles	EFZN
Lars Landberg	DNV
Manuel Palop Martinez	Shell
Marcin Luczak	Gdansk University
Mariya Trifonova	Centre for Study of Democracy
Martin Knops	ZF Wind Power
Mark Norton	SmartWires
Mike Anderson	RES
Mikel Sojo	Acciona
Paul McKeever	ORE Catapult
Paula Pinho	European Commission
Peter Eecen	TNO

Poul Skjaerbaek	Siemens Gamesa
Rajnish Sharma	Equinor
Stephan Barth	ForWind
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Teresa Ojanguren	Iberdrola
Wouter Dirks	Van Oord