

ETIPWind Steering Committee meeting



Funded by
the European Union

30 October 2023 – 11:00-12:30

Online

Welcome & Introduction

Adrian Timbus
Vice President Portfolio and Market
Strategy, Hitachi Energy
ETIPWind Chair

Objective of today's meeting

- Share the **feedback from the CTOs** on the 1st draft of the Strategic R&I Agenda.
- Discuss the **main changes** that will be integrated in the final version and address the **last pending points**.

This is the last opportunity to share your feedback on the ETIPWind's Strategic R&I Agenda before the content is finalised



Agenda

11:00-11:05	Welcome & Introduction	Adrian Timbus, ETIPWind Chair
11:05-11:15	EU Policy update <i>(including Wind Power Package and Revamped SET Plan)</i>	ETIPWind Secretariat
11:15-11:25	CTOs feedback on the draft Strategic R&I Agenda	ETIPWind Secretariat
11:25-12:10	Main changes to be integrated in the final Strategic R&I Agenda <i>(including discussion and additional comments from SC members)</i>	ETIPWind Secretariat
12:10-12:20	Next steps for the Strategic R&I Agenda	ETIPWind Secretariat
12:20-12:30	Conclusion and Save-the-Dates	Adrian Timbus, ETIPWind Chair

Welcome to the new Steering Committee members!

- **Felix Cebulla**, Technology & Innovation Manager, RWE
- **Kasper Roed Jensen**, Board Member, VP Next Generation Concepts and Partnering, Vestas

EU policy update

Wind Power Package: a game-changer for the wind industry

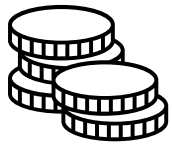


Ursula von der Leyen, State of the European Union speech, September 2023

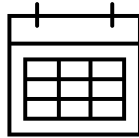
- Improve **auction systems** in Member States
- Help **finance investments** for new factories, infrastructure and wind energy workforce (e.g. Innovation Fund)
- Improved visibility on **wind energy deployment**
- Accelerate **permitting** of new windfarms (digitalisation).

The Innovation Fund

➤ Next call for proposals:



€4bn
available



Open: 23 November
Deadline: 4 April



Funding: 60 % funding CAPEX
+ OPEX

Clean tech manufacturing

Scaling-up / manufacturing, logistics

Automation / Digitalisation

Make the case it's innovative

Mid-sized pilots

Projects for validating, testing and
optimizing highly innovative solutions

Revised SET Plan finally adopted

➤ **SET Plan:** Mechanism the EU uses to coordinate R&I policies and funding within the Member States.



- New priorities on cross-cutting issues (inc. sustainability by design, skills development, R&I, digitalisation, etc.)
- Expand the current technology scope to encompass all strategic renewable energy technologies.
- Establish a dedicated workstream on hydrogen
- Forge cooperation between the ETIPs and the European industrial alliances
- Provide a roadmap for progress that will be monitored through the SET Plan info system

CTOs feedback on draft SRIA

CTOs meeting in Lunderskov

4 CTOs (ENERCON, Ørsted, Vestas, ZF Wind Power) + 8 SC members

- Presentation from Claus Meineche from the Danish Energy Agency
- Detailed feedback on the draft SRIA
- Thematic session on Sustainability and Circularity
- Visit of LM's test facilities



Feedback from the CTOs

- **General feedback:**

- Total public investment to be better justified.
- Need stronger arguments in the first 2 chapters to show the consequences if we don't get the investment we need.
- We need to change the order of the R&I areas to better reflect the structure of our thinking.
- Executive summary and/or Conclusion part to highlight the key messages from the R&I priorities.

Feedback from the CTOs

- **Wind energy system integration:**
 - All the R&I actions should be only related to wind energy (e.g. development of hydrogen and storage should be out of scope)
 - Budget seems high, need to better justify the political messages.

Feedback from the CTOs

- **Industrialisation, scale-up and competitiveness:**
 - Quality issues -> should they be better embedded with R&I actions focused on testing methods or should it be out of scope.
 - Need to clarify 1st topic on mass production, in particular on semi-automation. The main focus should be to help operators to do their jobs in the right-way.
 - Research for alternative financing routes should be removed, it's not R&I.

Feedback from the CTOs

- **O&M and Digitalisation:**
 - Need to go beyond park level control and better embed yield quantification.
 - Need better clarity on the goals -> the title of the area should be Operational efficiency and decommissioning.
 - Is decommissioning really a short-term priority?

Feedback from the CTOs

- **Sustainability & Circularity:**
 - Topic of secondary materials, second market for wind turbine components, not enough embedded.
 - Need to better explain that we're already quite sustainable.

Feedback from the CTOs

- **Skills and Coexistence:**

- Net-zero academies should be mentioned
- Harmonisation of training and educational programmes should be better stressed.
- Communication activities to attract workers is not in the scope of ETIPWind.

Main changes to be integrated in final SRIA

Main changes to integrate

- **General feedback:**
 - Total public investment to be better justified. -> Number and types of projects will be added in the document.
 - Need stronger arguments in the first 2 chapters to show the consequences if we don't get the investment we need. -> The first 2 chapters will be refined.
 - We need to change the order of the R&I areas to better reflect the structure of our thinking -> This will be done (Industrialisation first).
 - Executive summary and/or Conclusion part to highlight the key messages from the R&I priorities. -> This will be added.

Main changes to integrate

- **Wind energy system integration:**

- All the R&I actions should be only related to wind energy (e.g. development of hydrogen and storage should be out of scope) -> **Open question, should this R&I action be removed?**
- Missing point: all the grid activities have an influence on the drive train. Primarily on the electrical side (necessary adjustments of the converters and their control) but also on the drive train, e.g. more frequent shutdowns (startup and shutdown processes), etc. -> **Open question: should it be addressed?**
- Missing point: Since the increase pace of the grid growth is not coping with the current situation of congestion and curtailments, there should be research on how to exploit existing grid infrastructure to the maximum. -> **Open question: should it be included?**

Main changes to integrate

- **Industrialisation, scale-up and competitiveness:**
 - Quality issues -> should they be better embedded with R&I actions focused on testing methods or should it be out of scope. -> **Open question.**
 - Research for alternative financing routes should be removed, it's not R&I. -> **Open question: should it be removed?**
 - Design for reliable and lasting products: Development of new bearings solutions to cope with increase size in wind turbines, innovative validation and testing methods to ensure the adequate performance of these solutions **Open question -> should it be included?**

Main changes to integrate

- **Industrialisation, scale-up and competitiveness:**
 - Software-> digital tools for assisting process and quality control. Name virtual reality, machine learning or augmented reality? -> **Open question.**
 - New materials to cater for large volumes. -> **Open question: should it be added?**
 - AI vs. testing and certification-> **should it be included?**
 - Small wind -> **should it be included?**

Main changes to integrate

- **O&M and Digitalisation:**

- Need better clarity on the goals -> the title of the area should be Operational efficiency and decommissioning. -> **This will be implemented.**
- Is decommissioning really a short-term priority? -> **Open question: should it be removed?**

Main changes to integrate

- **Sustainability & Circularity:**

- Topic of secondary materials, second market for wind turbine components, not enough embedded. -> **Open question, is there any related R&I?**
- Need to better explain that we're already quite sustainable. -> **This will be clarified.**

Main changes to integrate

- **Skills and Coexistence:**

- Harmonisation of training and educational programmes should be better stressed. -> This will be added.

Main changes to integrate

- **Secretariat observations:**

- SRIA outlines recommendations for priorities. We use “should” not “shall” or “will”
- R&I priorities should be short and concise. We’ll remove qualifiers such as “cost-efficient”, “improved”, “advanced” and as much as possible “new”, “innovative” ... etc.
- We should better specify “digital tools”,
- We will list “scope of R&I actions” instead of “examples of R&I actions”

Next steps for ETIPWind's SRIA

Next steps for ETIPWind SRIA

- The first draft is **being reviewed** by several stakeholders:
 - *ETIPWind Steering Committee* - **Done**
 - *CTOs Forum* - **Done**
 - *IWG Wind (Member States representatives)* **Done**
 - *ETIP SNET* – **Today**
- **Final content will** be finalised by Secretariat on **6 November**.
- You will receive the final version but we cannot guarantee that additional changes can be integrated after 6 November.

Next steps for ETIPWind SRIA

- SRIA Launching event on **4 December** (*tentative date*).
- At **ZF Wind Power's facilities**, in Lommel (Belgium).
- **Half day event**, around **50 participants**, **high-level speakers** (Head of Cabinet Commissioner Research & Innovation, Flemish Minister for Innovation, etc.)



Save the Date!

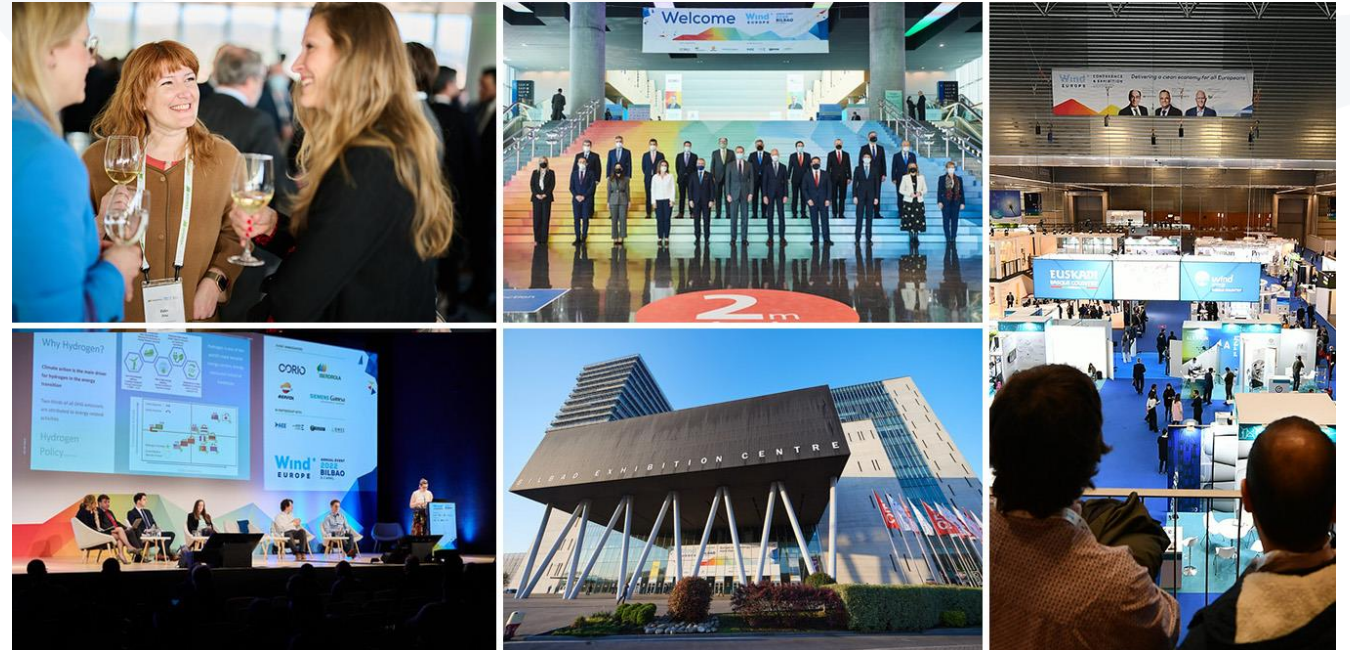
Conclusion

Next steps and Save the Date

- The **Strategic R&I Agenda** will be finalised and published **end of November**.
- We will start disseminating R&I recommendations at the **SET Plan Conference** in Barcelona on **13-14 November**.
- **SRIA launching event** on **4 December** in Lommel, Belgium.
- A **full communication & dissemination campaign** will follow the SRIA publication (promotion video, social media, press releases, dissemination plan including meetings with EU and national policymakers).

Next steps and Save the Date

- **Next SC+CTOs meeting:** in parallel of WindEurope's annual event in Bilbao, **20-22 March 2023**.
- Including **technical session** to discuss key R&I recommendations.



Save the Date!

THANK YOU

Contact: secretariat@etipwind.eu