



EUROPEAN TECHNOLOGY & INNOVATION
PLATFORM ON WIND ENERGY

Executive Committee meeting minutes

WindEurope

28 November 2019



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1 Action points

- The secretariat will circulate the updated terms of reference for consultation with the EXCO members. The document shall specify in comments the source and/or motivation for the changes made.
- The ETIPWind secretariat will explore opportunities to organize a roundtable between ETIPWind representatives and officials from the European Commission and national governments in Q1 of 2020.
- The secretariat will circulate its suggestions to the EXCO for approval via email (online survey).
- The secretariat will explore opportunities for co-organising a joint event in line with the EERA JP Wind – SETWIND annual event in September 2020.
- The secretariat will perform a more detailed analysis of crosscutting themes and priorities between the ETIPWind Roadmap and the materials provided by the national platforms.
- The secretariat proposes the following indicative timeline for the next EXCO meetings:
 - 03 February – Telco
 - 10 March – EXCO meeting in Brussels
 - 22 April – EXCO meeting in Naples (joint with SETWIND?)
 - Mid-May - Telco
 - End of June – EXCO meeting in Brussels
 - Mid-September – EXCO meeting in Amsterdam (joint with SETWIND?)
 - Beginning of December – EXCO meeting in Brussels

2 Introduction

Aidan Cronin, Executive Committee chair opened the meeting. He highlighted the main deliverables and achievements of the platform including the Roadmap, the factsheet “How wind is going circular. Blade recycling” and the workshop on electrification.

In addition, there is excellent coordination between industry and the EERA JP Wind and EAWE. The collaboration with the SETWIND project looks particularly promising.

3 Terms of reference

The secretariat proposes to revise the Terms of Reference to better reflect the updated mandate of the ETIPWind platform, which is described in Grant Agreement No 826042.

In addition, the new terms of reference will spell out the detailed election process to join the EXCO. A new election for EXCO members and an EXCO Chair will be held in June 2020. The new EXCO will have 27 seats, 9 representing the research community and 18 representing the industry.

ACTION: the secretariat will circulate the updated terms of reference for consultation with the EXCO members. The document shall specify in comments the source and/or motivation for the changes made.

4 Feedback from Advisory Group

The Advisory Group welcomed and approved of the final version of the ETIPWind Roadmap, which was prepared by the Executive Committee and launched during the WindEurope Offshore 2019 event.

The group discussed the scenarios presented on figure 2 (p.6) of the roadmap. The group agreed that the scenarios of the European Commission and Eurelectric may be too ambitious, especially regarding onshore wind installed capacity (643 MW – 758.7 MW). To deliver on these targets the sector will need significant investments in research & innovation, but also in industrial infrastructure.

The group formulated a request to the Executive Committee to provide a more detailed 2050 outlook for wind energy deployment based on the 'Vision document' and input of the entire wind energy sector. This 2050 outlook should contain a low, mid and high scenario. This vision should be a wind-centric view on the energy system and could include:

- Different pathways dependent on the varying framework conditions, resulting in a low, medium and high scenario.
- An estimation of the number of turbines required and their geographical distribution.
- An estimation of developments in wind energy technology (e.g. turbine sizes, materials used, recyclability rates) and the wind energy supply chain (standardisation).
- An analysis of key enabling technologies (e.g. storage, power-to-x) best suited to support the development of wind energy.
- An analysis of the framework conditions (regulatory frameworks, market conditions, industrial policies, environmental policies) building on the work of WindEurope.

The Group also discussed possible skills gaps in the workforce and how to increase the attractiveness of the wind energy sector on the job market. In addition, the Advisory Group stated the sector needs to use new, more sustainable materials to foster social and public acceptance and comply with future environmental regulation. As most of such materials are not yet cost-competitive, more funding to R&D and testing will be required.

5 Technology Roadmap

The secretariat briefly explained the strategy to disseminate the ETIPWind Roadmap. The report was launched at a conference session during the WindEurope Offshore 2019 event. The sessions was organised together with the SETWIND project. 290 people attended the session.

As a next step the secretariat will set up bi-lateral meetings with officials from the European Commission. The secretariat will focus on DG CLIMA (climate), ENER (energy) and GROW (industry & economics) and of course DG RTD (research & innovation). Regarding DG RTD, the secretariat will focus on unit D.1 (Clean energy transition), D.3 (low emission future industries), F.1 (sustainable industry systems), F.4 (materials for tomorrow) and C.3 (climate & planetary boundaries).

In addition, efforts will be made to reach out to representatives of the various national governments. These representatives will have a big say in the design of the calls to be included in the work programmes of Horizon Europe. To this end ETIPWind will also liaise with national associations and technology platforms to align on messaging. As a first step, several national platforms have been invited to present their priorities to the EXCO.

ACTION: the ETIPWind secretariat will explore opportunities to organize a roundtable between ETIPWind representatives and officials from the European Commission and national governments in Q1 of 2020.

6 Update on European R&I policy

The secretariat gave a brief update on European funding policies and instruments for Research & Innovation.

Negotiations in Brussels focus on the next Multi-annual Financial Framework (MFF). This MFF will be the EU budget for 2021-2027. The Commission proposed a budget of €1279.4 bn, but the real budget will be significantly lower (between €35 bn and €113 bn lower). Austria, Denmark, Germany, The Netherlands and Sweden are the biggest supporters of a leaner (i.e. smaller) budget.

The Finnish presidency proposes a budget that focuses on Cohesion and Agricultural policy, which have traditionally been the cornerstone of the EU budget. As such, all other programmes, including Horizon Europe and the Connecting Europe Facility, will see their budget significantly reduced. Governments will discuss the EU budget in Brussels in December. A final decision is only expected by Q4 2020.

The budgetary uncertainty also has an effect on the development of the Horizon Europe programme. The European Commission should already have launched the strategic plan for Horizon Europe, which will spell out the main priorities for the first 4 years of Horizon Europe (2021-2024). However, the Commission services are withholding the publication until a more details of the budget are available.

As a result, the design of the more detailed work programmes, which contain the specific calls for proposals, is also delayed. In a worst-case scenario, the start of the Horizon Europe programme could be delayed with a few months. This would mean the first calls of proposal would open in May 2021, rather than in January.

The ETS Innovation Fund is supported by the auctioning of carbon emission allowances and thus it is separated from the EU budget. The programme will become active in 2020. The WindEurope and ETIPWind secretariat will join an expert group of the European Commission to discuss the details of the first calls for proposals in December. At the meeting the Commission will also explain their methodology for defining the “innovation” and the “GHG emission avoidance”.

7 Impact of REACH policy on wind energy

Due to the visit of Patrick Child, Deputy Director-General of the European Commission DG Research & Innovation, this topic was not addressed in the meeting. See the slides for reference.

8 ETIPWind 2020 Work Programme

The secretariat gave a brief presentation on the major milestones for 2020 and 2021.

With regard to publications ETIPWind will need to publish two factsheets, one in 2020 and one in 2021, and a major publication in 2021. Preparation of the 2021 publications should already begin in 2020.

The secretariat proposes to organise a roundtable with EU officials and Member States’ representatives to disseminate the sector’s research & innovation priorities directly to key policymakers. This workshop could be additional to the one promised in Q3 of 2020. If the Q3 workshop is retained it, synergies with the EERA JP Wind – SETWIND annual event in Amsterdam could be developed.

For the thematic factsheet the secretariat proposes one of following topics:

- (Offshore) supply chain bottlenecks;
- Sustainable materials; and

- State-of-art floating offshore wind technology.

Regarding the 2021 publication, the secretariat proposes to develop a 2050 technology vision document that would spell out the sector's expectations regarding wind energy deployment and technology development.

ACTION: the secretariat will circulate its suggestions to the EXCO for approval via email (online survey).

ACTION: the secretariat will explore opportunities for co-organising a joint event in line with the EERA JP Wind – SETWIND annual event in September 2020.

9 Aligning EU-wide and country-specific research agendas

As national governments also have a large say in how European funding for energy is allocated, the ETIPWind secretariat invited several national technology platforms (DE, DK, ES and UK) to present their R&I priorities and to identify common focus areas where EU-wide research can add value.

Collaboration could focus on aligning the broad scope of the national priorities. Several national platforms have used the ETIPWind Strategic Research & Innovation Agenda as a starting point for their discussion.

From the discussion three main areas of common interest emerged:

- Grid & system integration;
- Floating Offshore Wind; and
- End-of-life strategies (decommissioning, lifetime extension, recycling).

The detailed presentations can be found on the ETIPWind website, see below a short recap.

MegaVind (DK)

- The Megavind Research Agenda tries to collect the relevant challenges for which the sector would like to submit joint project (industry-academia) proposals to national funding schemes.
- The platform does not consider specific areas for cross border collaboration.
- Megavind works closely with the Danish Energy Agency to ensure the strategic agenda is well implemented.

Offshore Innovation Hub (UK)

- The Roadmap is updated twice every year and contains all priorities for research & innovation in support of the UK offshore wind market.
- The roadmap includes 200 topics spread across 3 mission areas: "next generation turbines/foundations", "transmission and integration" and "smart operations and maintenance".
- In the roadmap the areas suited to cross border collaboration are: "grids & system integration", "decommissioning & recycling" and "societal impacts".
- The Offshore Innovation Hub has close links the offshore wind growth partnership and the various national funding agencies so that calls for proposals are directly linked to the roadmap priorities.

REOLTEC (ES)

- In Spain the public funding landscape is quite diverse and funding mechanisms are quite complex.
- The technology platform REOLTEC focuses on 4 major topics:
 - Grid & System Integration (storage technology, provision of ancillary services...);

- Lifetime extension;
- Floating Offshore Wind; and
- Component reliability.
- The valley of Death is a real issue in Spain as there are few funding mechanisms that can provide large grants. EU funding can play a vital role in overcoming this problem.

GERMAN RESEARCH NETWORK RENEWABLE ENERGY (DE)

- The research network is part of the federal ministry for energy and economic affairs, as such the network's recommendations are well implemented.
- The network focuses on compiling recommendations for specific projects to be funded through the Energy Research programmes.
- Research related to grid & system integration are covered by another research network.
- The network's recommendations focus on supporting the German sector, but the network is (increasingly) active in transnational platforms such as the ERA-NETS and the SET-Plan Implementation Plans.
- The network is active in the SET-Plan Implementation Plan for Offshore Wind and the corresponding SETWIND platform.

ACTION: the secretariat will perform a more detailed analysis of crosscutting themes and priorities between the ETIPWind Roadmap and the materials provided by the national platforms.

10 Next meetings

Below is an indicative schedule of the next EXCO meetings

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- 22 April – EXCO meeting in Naples (joint with SETWIND?)
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11 Participants list

Organisation	Representative
DNV GL	Lars Landberg
DTU	Mattias Andersson (invited)
EAWC (University of Oldenburg)	Stephan Barth
EAWC (University of Strathclyde)	Athanasios Kolios
EERA JP Wind (CENER)	Xabier Munduate
EERA JP Wind (DTU)	Nicolaos Cutululis
EERA JP Wind (Fraunhofer-IWES)	Arno van Wingerde
EERA JP Wind (ORE Catapult)	Paul McKeever
EERA JP Wind (SINTEF)	John Olav Tande
EERA JP Wind (TNO)	Peter Eecen
ENEL Green Power	Demeetrio Malara
Equinor	Hanne Wigum
GE Renewable Energy	Jaco Nies (joined online)
Iberdrola Renovables Energía	César Yanes Baonza (joined online)
LM Wind Power	John Korsgaard
Megavind	Edit Lulu Nielsen (WindDenmark)
Megavind	Peter Hjuler Jensen (DTU)
Megavind	Per Hessellund Lauritssen (Siemens Games)
Ørsted	Jørn Scharling Holm
Offshore Innovation Hub	Kacper Stefaniak (ORE Catapult)
Reoltec	Tomas Romagosa (AEE)
RES (retired CTO)	Mike Anderson
RWE Renewables International GmbH	Henrik Wall (joined online)
Siemens Gamesa	Aidan Cronin
WeAmecc	Florent Vince (observer)
WindEurope	Alexandra Simon
WindEurope	Alexander Vandenberghe