ETIP Wind

EUROPEAN TECHNOLOGY & INNOVATION PLATFORM ON **WIND ENERGY**

Executive Committee meeting minutes

WindEurope

03 March 2020

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1 Introduction

Aidan Cronin, Chair of the Executive Committee (EXCO) presented the 2020 work programme and how the covid-19 outbreak (the coronavirus) could affect the indicative planning made at the end of last year.

The Secretariat presented its indicative 2020 work programme, including the main meetings and key deliverables. The EXCO asked the Secretariat to include a presentation on the dissemination plan for the key deliverables at the next meetings.

Regarding those meetings, the EXCO proposed to cancel the physical meeting in Naples on 22 April and to host one or two telcoes instead. The EXCO did not foresee any challenges to hold a physical meeting in June.

Action: The Secretariat proposes to organise two telcoes on 22 April and 13 May.

Action: The Secretariat proposes a physical meeting in Brussels in June. It would be in the week of 22-26 June in line with the European Sustainable Energy Week (EUSEW).

Action: The Secretariat proposes to hold another physical meeting on 14 September in Amsterdam. The meeting would align with the EERA JP Wind/SETWIND annual conference on 15-16 September.

2 Sustainability, environment and materials

The Secretariat presented the latest developments on the REACH (Registration, Evaluation, Authorisation and Restriction of Chemicals) with a focus on lead, silver and silver nitrate.

Lead could be identified as a Substance of Very High Concern (SVHC) and any use could be banned in the EU from 2024 onwards. Lead is extensively used in export cables (and part of the standard of at least one 'dry-design'). A ban would hurt the European cable manufacturing industry but would allow developers to still procure lead-based export cables from China.

WindEurope and Europacable, the association representing European wire and cable producers, are working together on the impact analysis of a possible ban. Possible mitigation strategies include advocating for sector-specific exemptions or promoting a gradual phase-out coupled with R&I funding for the development of lead-free cables.

As the development of lead-free cables is included in the ETIPWind Roadmap, the EXCO suggests focusing on the latter. In addition, the need for dynamic export cables for floating offshore wind farms could spur this development (as lead is not a suitable material).

A final decision by ECHA (the European Chemicals Agency) is expected in Q2 or Q3 of 2021.

Silver and silver nitrate could also be reclassified as more hazardous substances. However, it is still unclear to the Secretariat what the real impacts of such a reclassification would be for the wind energy sector.

WindEurope has circulated two surveys of the European Precious Metals Federation (EPMF) to its members on the use of silver in the wind sector. One for downstream users and one for manufacturers/importers. The responses will be used by EPMF to formulate a response on the reclassification of silver and silver nitrate. WindEurope will continue to monitor the situation in close collaboration with EPMF.

The EXCO proposes to reach out to the electronics sector to get a better understanding on how much silver is used in the sector and on the current barriers and restrictions.

3 Offshore grid technology gap analysis

Aidan Cronin, Chair of the EXCO attended a workshop on High Voltage Direct Current (HVDC) grid technology organised by the European Commission, Directorate General Energy (DG ENER). The workshop focused on how HVDC technology could be employed to accelerate the build-out of an offshore grid capable of sustaining 450 GW of offshore wind.

DG ENER held this workshop to feed into the Offshore Renewable Energy Strategy, which is part of the Green Deal. They requested more input on the grid technology gaps in Europe and opportunities to claim global leadership in HVDC technology.

The EXCO identified the following needs:

- A European study assessing the most efficient build-out of an offshore grid with 450 GW of wind energy installed taking in account the available wind resource;
- Increased interoperability of power electronics. Power electronics are control-based and each manufacturer devices their own controls. There could be an adverse effect on converters;
- Design common Europe-wide operating protocols for offshore grids including a re-evaluation of the current market design in order to maximise low-cost offshore wind development (e.g. the role of hybrid offshore projects); and
- Further developments are needed in HVDC switchgear and circuit breakers, including increased sustainability of the existing technology.

Additional recommendations can build on the findings from the PROMOTioN Project (PROgress on Meshed HVDC Offshore Transmission Networks), which addresses technical and other barriers to the implementation of a meshed offshore HVDC transmission network.

The WindEurope working groups on 'Offshore Wind' and 'System Integration' will hold a joint meeting to further develop the sector's view on offshore grid development. The ETIPWind EXCO will be invited to that meeting.

Action: Nicolaos Cutululis (DTU) to share results from the PROMOTioN project.

Action: Paul McKeever (ORE Catapult) to share study on market design from University of Strathclyde.

Action: Secretariat and WindEurope to continue discussions with DG ENER on offshore grid development and the possible tendering for an EU wide study.

4 Roundtable: Technology Outlook for climate neutrality by 2050

In 2021 ETIPWind will need to deliver a new publication, which was provisionally put as an update of the Strategic Research & Innovation Agenda. However, considering recent policy developments, the Secretariat proposed the 2021 report to be an industry-driven analysis of the role of wind energy in a climate-neutral Europe.

The report should provide the industry's views on how much wind can be delivered by 2050 and what policies and technologies are needed to meet the ambitions of the European Green Deal. It should also clarify the current state-of-the-art in wind energy technology and provide insights on future developments in wind technology.

Furthermore, it should provide recommendations to policymakers on the actions needed to ensure that the European wind energy sector can deliver on the ambitions of EU institutions whilst enhancing its technology leadership and competitiveness in the global and domestic markets.

The report should become the flagship report of the 2021 Electric City conference and exhibition organised by WindEurope and should be developed in close collaboration with the WindEurope secretariat.

The EXCO held a roundtable discussion on the elements to be included in the report. The list of recommendations below is non-exhaustive and identifies only key elements to be included in the report.

- Low, medium and high scenarios for wind energy development;
- Barriers/enablers for deployment:
    - Grids;
    - Electrification;
    - Social acceptance; and
    - Synergies with solar PV and storage.
- Description of the state-of-the-art in wind energy technology:
    - Current and future materials for turbine design (weight per material per MW); and
    - Costs of wind energy (CAPEX per component per MW).
- Effects of climate change on infrastructure works and social behavior;
- Investments needed in research & innovation; and
- Socio-economic benefits of wind energy.

All metrics should be correlated to the wind energy development scenarios. For example, lower electrification of energy use will lead to lower overall wind energy development. Or, more improvements in lightweight materials will increase wind energy deployment.

Action: the EXCO to decide on a concept note to be prepared by the ETIPWind Secretariat.

5 European R&I policies and instruments

The Secretariat presented the state of play regarding the European budget for 2021-2027 and the Green Deal and identified the main points of interest for the wind energy sector.

In February Charles Michel, President of the European Council, put a new proposal for the European budget on the table. The new proposal entails a €40 billion reduction of the budget, compared to the European Commission's original proposal. More funding would go to agriculture (+ €14 billion) whilst all other policy areas would see a reduced budget.

Horizon Europe's budget would be reduced to €80.9 billion for grants and €3.1 billion for financial instruments. This is a €2.5 billion cut compared to the European Commission's proposal. In addition, there is a €3.3 billion cut to the Connecting Europe Facility (CEF), of which €2.5 billion from CEF Energy.

In January the European Commission launched the Green Deal, placing climate neutrality by 2050 at the core of a new growth strategy. The Green Deal includes a set of policies aimed at ensuring environmental protection and helping companies to become leaders in clean technologies and a just, inclusive transition.

The European Commission is devising a series of strategies on how to implement the Green Deal. ETIPWind and WindEurope will monitor the progress of these strategies and provide the sector's recommendations when relevant.

The most important upcoming European strategies (and their publication date) are:

- European Climate Law (04 March);
- EU industrial Strategy (10 March);
- Circular Economy Action Plan (10 March);
- Smart Sector Integration Strategy (Q4 2020); and
- Offshore Renewable Energy Strategy (Q4 2020).

The assessment of the final National Energy and Climate Plans (NECPs) in June 2020 will be a critical moment, as the plans will spell out the EU-wide ambition to reach a 40% of greenhouse gas (GHG) emission reduction by 2030 (compared to 1990 levels). This would entail a 32% of renewables in the European energy mix. The European Commission will propose a higher GHG emission reduction target (50-55%). The Green Deal should be built to deliver this target and the NECPs are the starting point.

To this end, the European Commission launched the Sustainable Europe Investment Plan (SEIP), which will mobilise €1,000 billion in investments to deliver on the climate and energy targets stipulated in the Green Deal. €503 billion will be covered by the EU budget, the rest will come from private investors and national authorities. The SEIP will run from 2020 to 2030.

6 Scoping workshop – floating offshore wind factsheet

As part of the contract with the European Commission, the ETIPWind will produce a second thematic factsheet on a specific research area. Based on the survey launched earlier this year, the EXCO decided that the topic will be floating offshore wind.

The factsheet aims to inform policymakers on the current state of floating technology and the most pressing research & innovation challenges. It will offer clear recommendations on how they can accelerate the development of the sector and strengthen the competitiveness of European companies in the global market.

The Secretariat proposed the formation of task forces in order to gather expert input from the EXCO members. A first draft is scheduled to be circulated towards the end of April.

7 Participants list

Organisation	Representative
DNV GL	Lars Landberg
EAWE (KU Leuven)	Johan Meyers
EDF Energies Nouvelles	Anastasiya Shapochkina
EERA (DTU)	Nicolaos Cutululis (online)
EERA (ForWind - University of Oldenburg)	Stephan Barth (online)
EERA (ORE Catapult)	Paul McKeever (online)
ENEL Green Power	Demetrio Malara (online)
ENEL	Giancarlo Potenza (online)
IBERDROLA Renovable Energia	César Yanes Baonza
LM Wind Power	John Korsgaard
Ørsted	Jørn Scharling Holm

RES	Mike Anderson
Siemens Gamesa Renewable Energy	Aidan Cronin (chair)
VESTAS	Agnar Gudmundsson
WindEurope	Alexandra Simon
WindEurope	Alexander Vandenberghe
WindEurope	Lizet Ramirez