



Executive Committee meeting

September 2020

etipwind.eu



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Alexander Vandenberghe

Advisor Research & Innovation

Competition compliance reminder

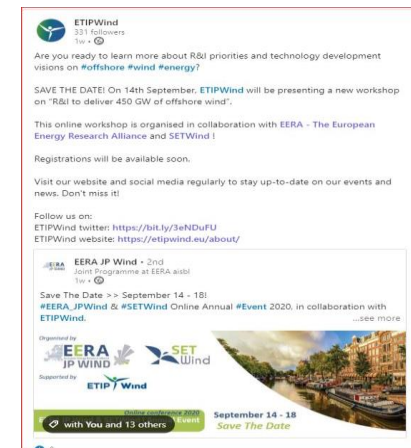
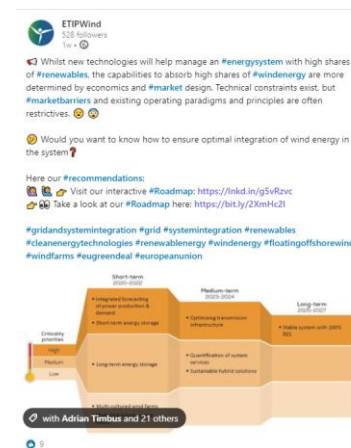
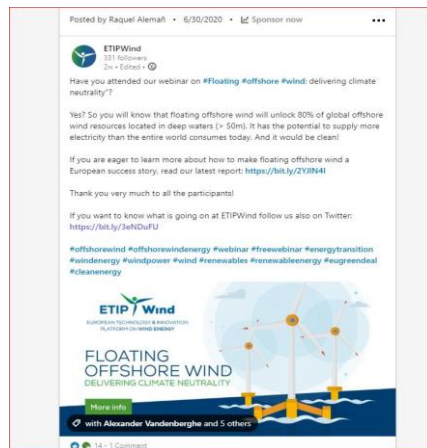
WindEurope and its members are committed to full and fair competition, and neither WindEurope nor its activities, working groups or task forces shall be used in any way inconsistent with relevant competition laws. In order to promote the compliance with these laws, WindEurope has adopted this Competition Compliance Policy in which the basic rules for competition compliance are set out.

| TIMING | AGENDA ITEM | SCOPE |
|---------------|---|-----------------|
| 10:00 – 10:05 | Introduction and welcome By Adrian Timbus, Executive Committee Chair | For information |
| 10:05 – 10:20 | Updates from the ETIPWind secretariat <ul style="list-style-type: none"> Communication strategy highlights 2021 ETIPWind Factsheet: Process and next steps | For discussion |
| 10:20 – 10:50 | 2021 Flagship report: scope and objectives <ul style="list-style-type: none"> Roundtable discussion | For discussion |
| 10:50 – 11:10 | Shaping Europe's wind energy R&I policy to 2030 By ETIPWind secretariat | For discussion |
| 11:10 – 11:40 | Levelised societal cost of energy By Matthew Smith, Trinomics | For information |
| 11:40 – 11:50 | R&I to deliver 450 GW of offshore wind workshop <ul style="list-style-type: none"> EERA JP Wind and SETWind Annual Event 14-18/09 ETIPWind workshop, 14/09 | For information |
| 11:50 – 11:55 | AOB | For discussion |
| 11:55 – 12:00 | Closing remarks By Adrian Timbus, Executive Committee Chair | For information |

Secretariat updates

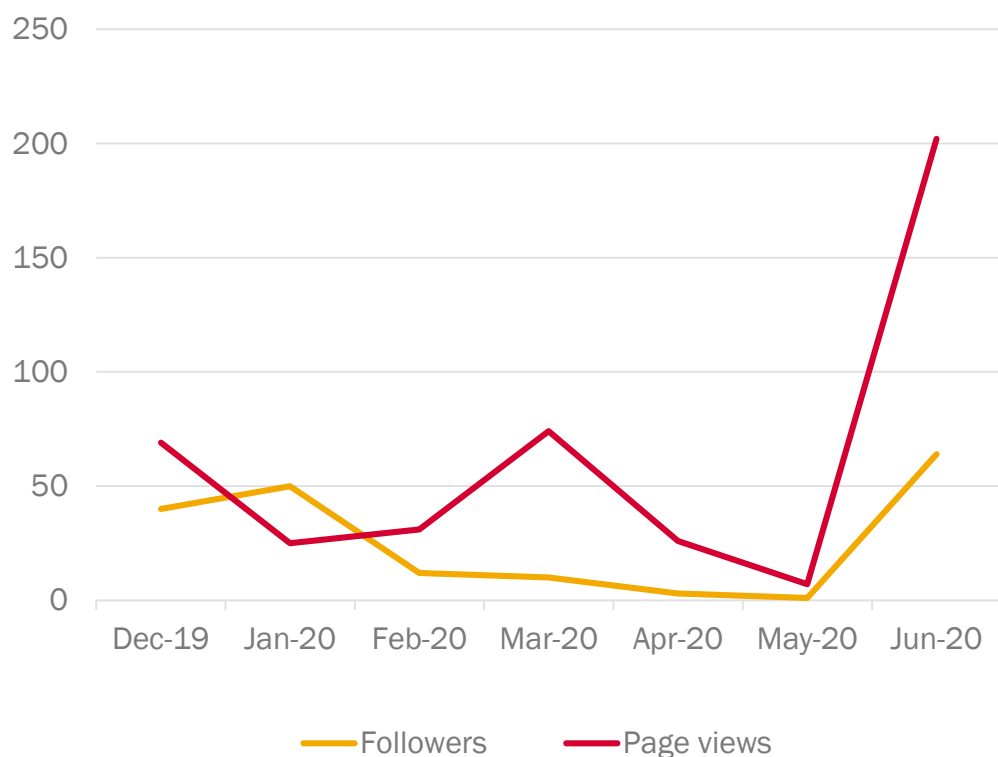
ETIPWind Communication Strategy

- ETIPWind communication analysis
 - Since June, impressions and followers have grown significantly;
 - 1-2 publications has been posted per day;
 - ETIPWind activities are more visible and popular on LinkedIn

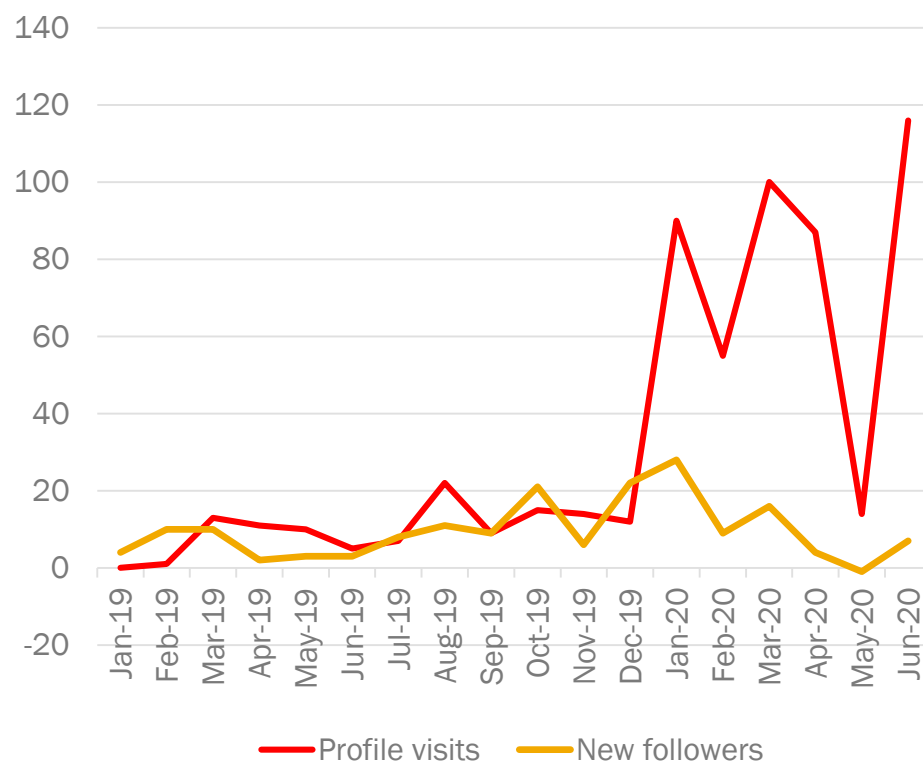


ETIPWind Communication Strategy

LinkedIn



Twitter



How to move forward?

- Increase collaboration between secretariat and members?
 - Work with communication department;
 - Promote R&I articles, abstracts, videos;
 - Promote wind energy events; and
 - Create audio-visual content, e.g. video.



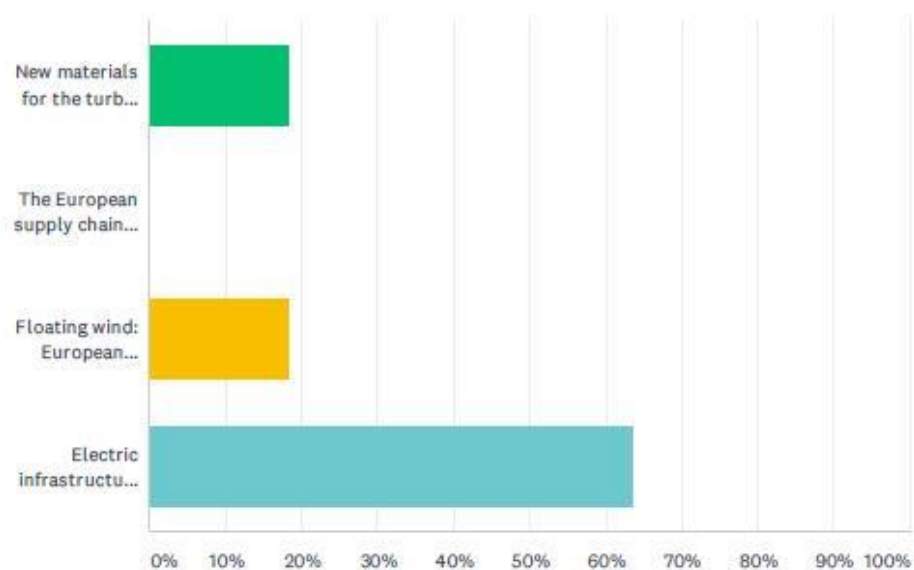
ETIPWind Factsheet 2021

ETIPWind factsheet survey (for EXCO members)

SurveyMonkey

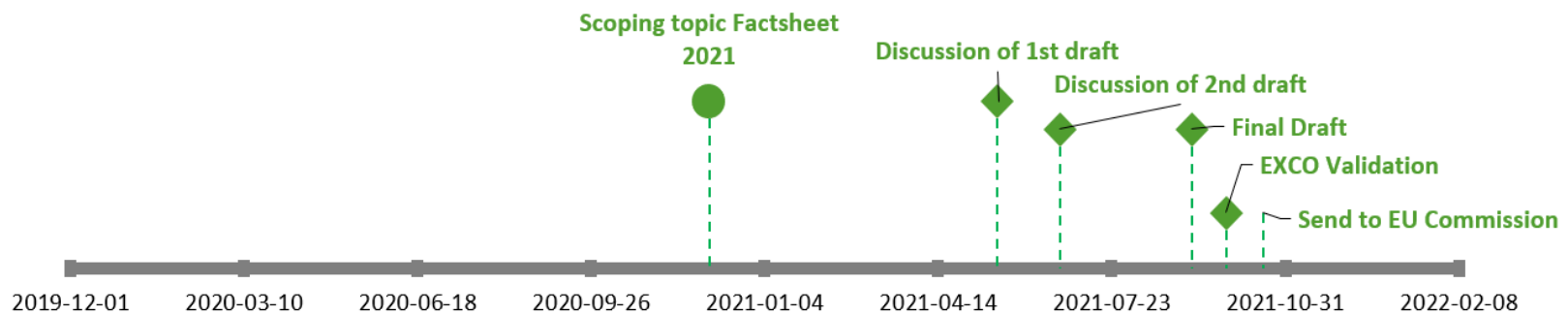
Q5 Which topic would you like to see addressed in 2021?

Answered: 11 Skipped: 0



ETIPWind Factsheet 2021

- Topic: Electrical infrastructure and balance of plant
- Delivery: October 2021



Milestones

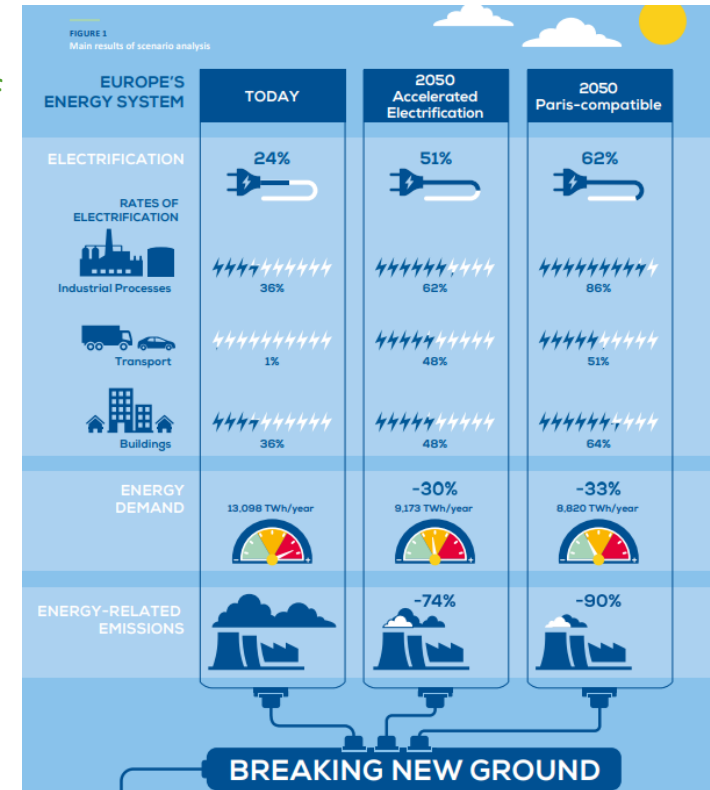
| Date | Label |
|------------|------------------------------|
| 2020-12-03 | Scoping topic Factsheet 2021 |
| 2021-05-18 | Discussion of 1st draft |
| 2021-06-23 | Discussion of 2nd draft |
| 2021-09-07 | Final Draft |
| 2021-09-27 | EXCO Validation |
| 2021-10-18 | Send to EU Commission |



2021 report: scope & objectives *discussion*

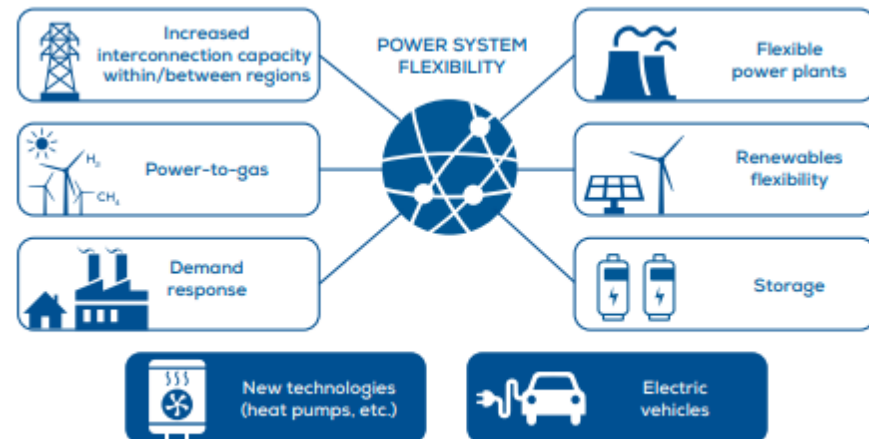
Objectives of the Report

1. Promote a series of regulatory changes and incentives that help accelerating the electrification of the energy system. Focus on the system interactions and infrastructure
 2. Promote the environmental and system benefits of certain solutions (storage, flexibility at generation, flexibility at demand, etc.)
 3. Identify innovation drivers
- Starting point:
 - Energy mix: EC's 2050 Roadmap- 1.5 Tech scenarios
 - Benefits of technologies and policy recommendations: WindEurope's Breaking new ground report (2018)



Use as starting point: The breaking new ground report

- Reform energy tax regimes
- Expand grid and introduce more Grid optimization technologies
- EV charging infrastructure deployment- Type and battery-to grid services
- Network charges regime for electrolyzers
- Demand-side flex incentives: Dynamic prices and time-responsive grid tariffs
- Grid development plans better adjusted to a decarb energy system
- Electrification Plans in the NECPs
- Electrification of Industrial processes.



Source: DNV GL for WindEurope

Brainstorm on the scope

- Electrolysers – tariffs exemptions, services to grid, and business case (e.g. Fuel supplier obligations)
- Power to gas- Injection of RES h2 into the natural gas pipeline
- Interaction with heat pumps (taxes, dynamic prices)
- Integration to heating networks and thermal storage
- Long-term storage (thermal, h2, CAES, etc.): incentives and innovation
- Grid expansion needs AND Grid optimization technologies
- Battery to grid services, Infrastructure needs at distribution for EV charging
- Flexibility as alternative to grid expansion (procurement of services, market access,)
- Wind farm flexibility (co-located storage, hybrids, ancillary services, grid forming converters)

Timeline and Governance

2-stage process

Key involvement of EXCO:

- Scope (sept)
- Kick-off meeting with consultants (Oct)
- Workshop (intermediary results) (Nov)
- Review final derivable (Dec)
- Report messages/ structure (Jan)
- Review advance/final draft (March)

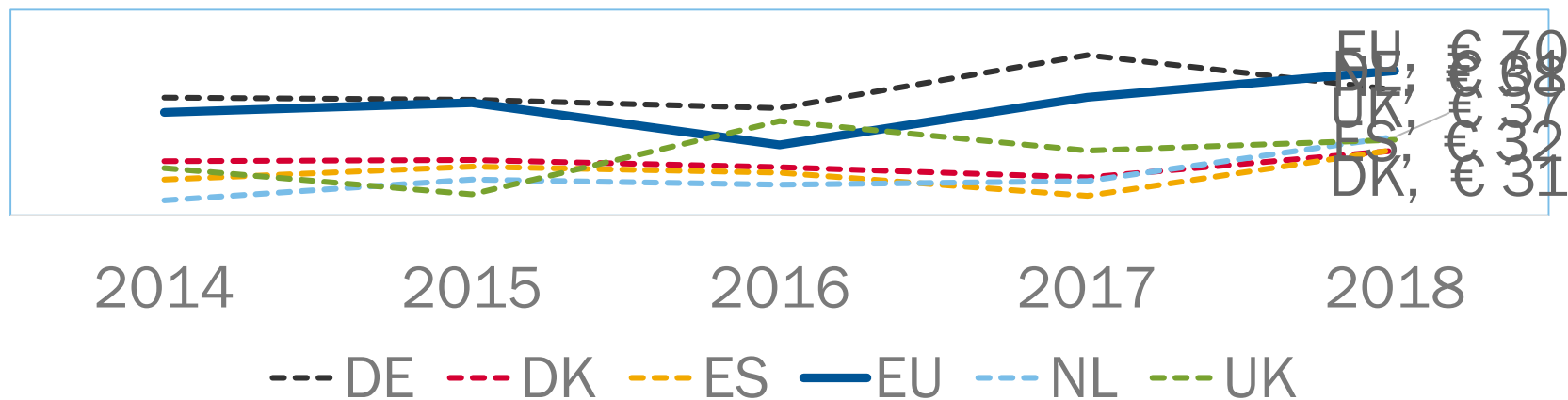
| | | 2020 | | | | | | 2021 | | | | | |
|-------------------------------|---|--------|------|--------|-----------|---------|----------|----------|---------|----------|-------|--------|--|
| | | June | July | August | September | October | November | December | January | February | March | April | |
| Phase 1 : Scope and narrative | | | | | | | | | | | | | |
| | Scope | 23-Jun | | | 07-Sep | | | | | | | | |
| | report structure | | | | 10-Sep | | | | | | | | |
| Phase 2: Engaging consultants | | | | | | | | | | | | | |
| | select winning proposals | | | | | 10-Oct | | | | | | | |
| Phase 3: research | | | | | | | | | | | | | |
| | Kick-off meeting/ Workshop | | | | | 22-Oct | | | | | | | |
| | workshop discussion | | | | | | 25-Nov | | | | | | |
| | Review | | | | | | | | | | | | |
| | Final deliverable | | | | | | | | 15-Jan | | | | |
| phase 4- Report | | | | | | | | | | | | | |
| | Internal Kick-off drafting team (def of messages and structure) | | | | | | | | 17-Jan | | | | |
| | EXCO sign-off : msgs and structure | | | | | | | | 28-Jan | | | | |
| | ETIP feedback | | | | | | | | | | | | |
| | Final sign-off | | | | | | | | | | | 14-Apr | |
| | Publication | | | | | | | | | | | 27-Apr | |
| | | | | | | | | | | | | | |
| | interaction with ETIP | | | | | | | | | | | | |
| | WindEurope | | | | | | | | | | | | |

*Dates are indicative

Shaping Europe's wind energy R&I policy to 2030

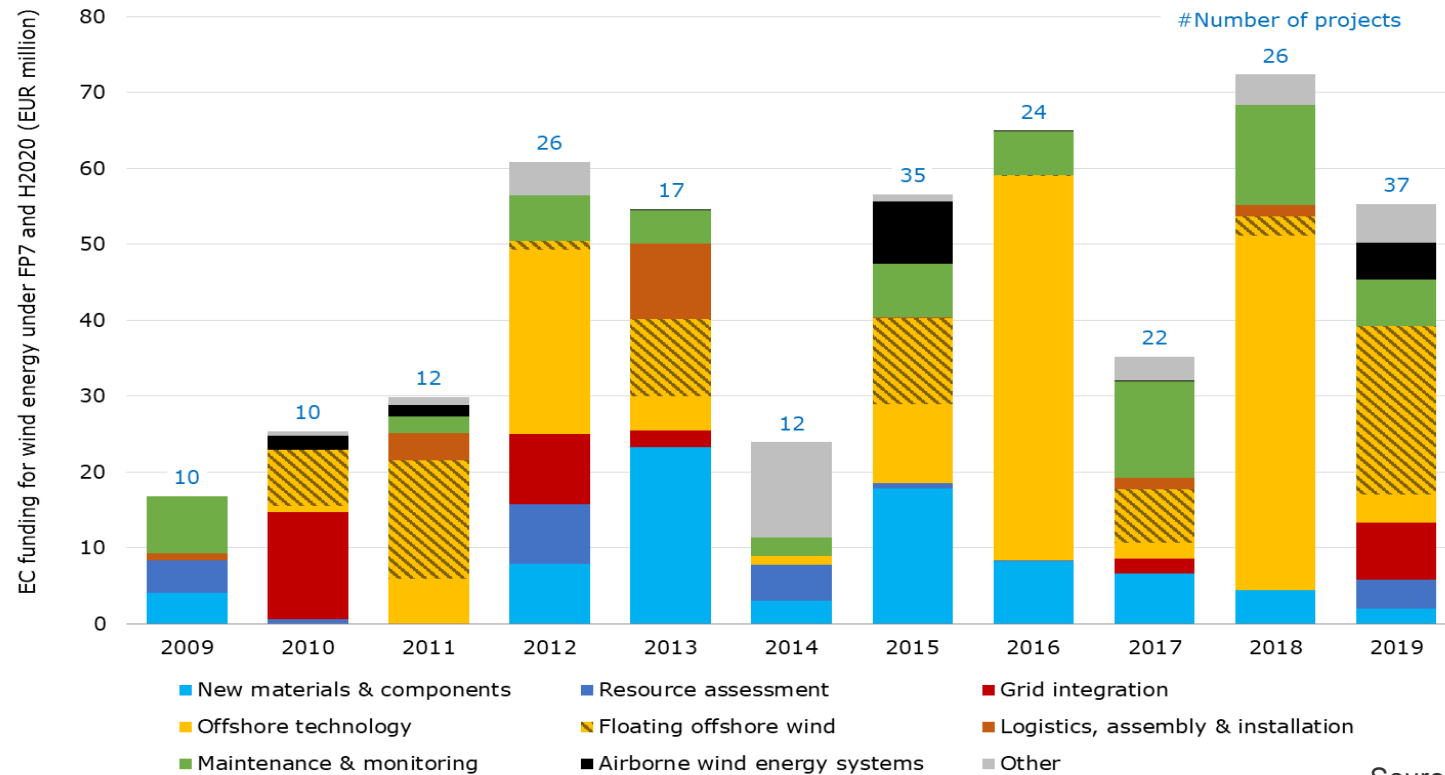
EU became Europe's biggest sponsor for wind R&D...

EU public funding for wind R&I 2014-2018
(in € million constant 2019 prices)



Source: IEA

...But mainly funds offshore wind R&D

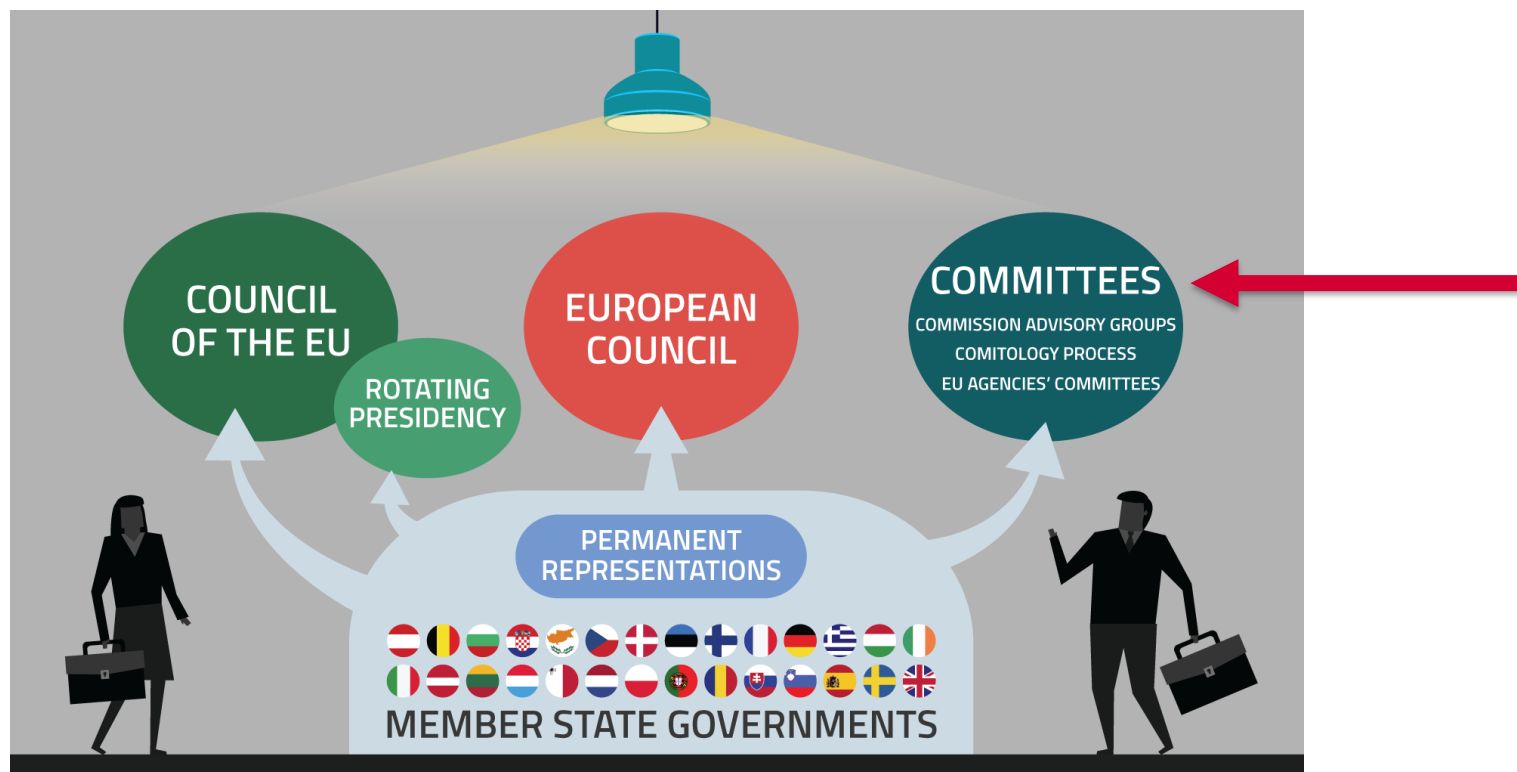


EU Council reduces budget for R&I

- 21 July Council meeting agreed on a €1.82 trillion recovery package
 - €1.074 billion EU budget
 - Horizon Europe -12.4%
 - InvestEU -65.8%
 - CEF Energy -32.5%
 - €750 billion Next Generation EU programme
 - Horizon Europe + €5 billion
 - InvestEU + €5.6 billion



EU policy is also made in national capitals



Launch of the H2020 Green Deal call



Levelised societal cost of energy *by Trinomics*

EERA JP Wind & SETWind Online Conference 2020

EERA JP Wind & SETWind Online Conference 2020 (in collaboration with ETIPWind)

- **Public EERA JP Wind sessions:**
 - Infrastructure for material and structural testing
 - Transforming the energy system and the impact to European citizens
 - Changing wind conditions and the impact to the wind turbine design
 - Accelerating offshore implementation after 2030
- **15 September: EERA JP Wind General Assembly** – open to all EERA JP Wind members
- **18 September: EERA JP Wind Steering Committee meeting** – only for EERA JP Wind Full members

Online Conference 2020

14th - 18th September



EERA JP Wind & SETWind Online Conference 2020 (in collaboration with ETIPWind)



ETIP Wind
EUROPEAN TECHNOLOGY & INNOVATION
PLATFORM ON WIND ENERGY

ONLINE WORKSHOP

R&I to deliver 450 GW of offshore wind

Date: 14 September 2020
Time: 14:00 - 16:00





AOB

Next steps



Thank you for your attention!



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