ETIP Wind

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

Executive Committee meeting minutes

By ETIPWind Secretariat

8 September 2020

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Table of Contents

1 Introduction and welcome

Adrian Timbus, Chair of the Executive Committee (EXCO), opened the meeting and presented the agenda.

2 Updates from the ETIPWind secretariat

2.1 Communication Strategy Highlights

ETIPWind secretariat presented the latest updates on the communication strategy, which started in June 2020. The presented data showed the increase of followers and views in ETIPWind's communication channels. Since June, ETIPWind attracted significantly more followers on social media, especially on LinkedIn (from 60 followers to 643). These promising results show that ETIPWind is reaching a larger and wider audience.

Action: Members, together with the secretariat, will create a Task Force to devise a comprehensive communication strategy. Members should have confirmed their interest to join the Task Force by Wednesday 16 September.

Action: Secretariat will prepare and circulate some ideas for material for social channels (e.g. possibility to record a three-minute video on one of the strategic Research & Innovation priorities and recommendations to policymakers).

Action: Members to share relevant materials (articles, videos, events, etc) on wind energy R&I that can be posted on ETIPWind channels.

2.2 2021 ETIPWind Factsheet: Process and next steps

The topic of the next ETIPWind factsheet was proposed in a survey in January 2020. The EXCO confirmed the results of the survey and decided that 'electrical infrastructure and balance of plant' would be the topic. This factsheet will be delivered in October 2021.

Members agreed to start working on the new factsheet from March 2021 (see timeline below).

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

3 2021 Flagship report: scope and objectives

Today, there are a lot of conversations at European level on electrification and how to achieve the ambitious 2030 and 2050 targets.

The idea is to explain how the system must transform to enable the ambitious volumes of wind and to promote the environmental and system benefits of a system with wind energy as the building block as well as of certain solutions such as storage, flexibility at generation, flexibility at demand, etc.

The report will promote a series of technologies, regulatory changes and market incentives that help speed up the electrification of the energy system, with a strong focus on the system interactions and infrastructure.

The flagship report will build on existing knowledge and other reports (European Commission (Energy mix: EC's 2050 Roadmap-1.5 Tech scenarios), JRC, Battery Alliance, ETIP SNET, DNV GL, Eurogas, etc.) and focus on the enabling technologies for a climate-neutral and wind-driven energy system.

Secretariat and EXCO members will work together to gather all the ideas and set up the structure of the flagship report. ETIPWind secretariat will circulate a 1-pager to hammer out the final discussion points and possible structure.

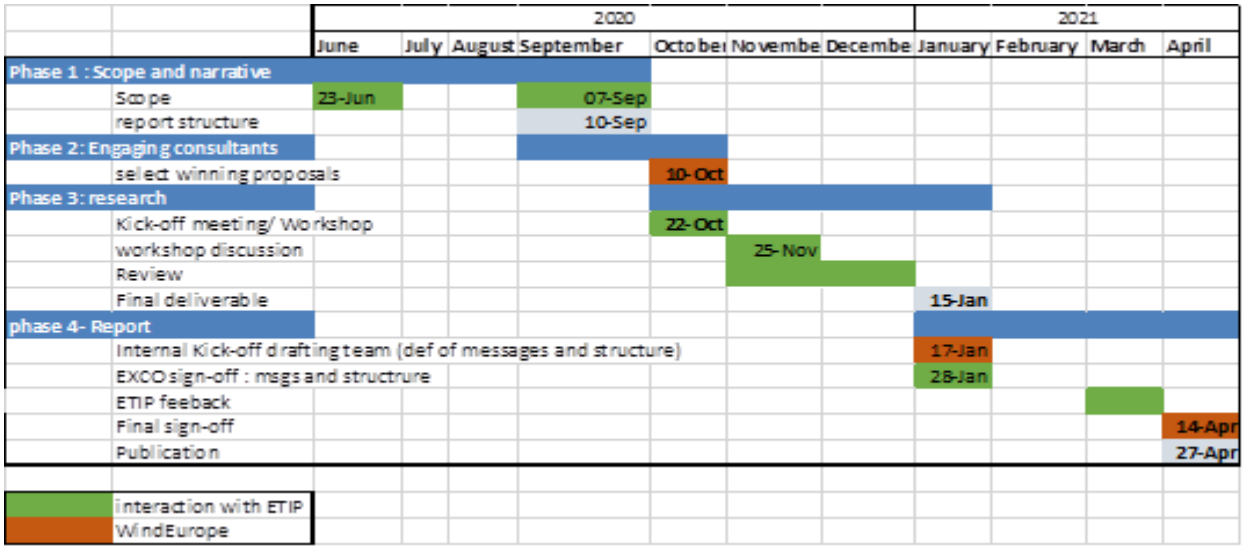
The proposed flagship will be carried out between ETIPWind EXCO and WindEurope. ETIPWind will provide the technology approach, and WindEurope will bring the regulatory recommendations. Secretariat will formulate ETIPWind opinion on the most effective energy transition.

The report is due in April 2021. An indicative action timeline can be found below.

Action: Members will provide a written feedback on the 1-pager defining the scope and expected impact of the report **by Friday 25 September**.

Action: Secretariat will set up a dedicated telco with interested members in October to discuss the next steps.

Action: Secretariat will review the EXCO meeting on Thursday, 3 December 2020 and align the new date with the report timeline (below).



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

The final position on the Horizon Europe budge will take place on September 29. This meeting will gather national research ministers from member states.

On 28 September the programme committee on 'Climate, Energy & mobility' will discuss the first draft of the Horizon Europe work programme.

To ensure a more robust wind R&I budget, members need to reach out to their national ministries asking for an increase to the Horizon Europe budget. ETIPWind will support the initiative. The message needs to be clear and concise:

- Retain the budget for "Climate, Energy and Mobility" (Pillar 2, cluster 5) as proposed by the European Commission (15 billion).
- Horizon Europe is a vital instrument to cement the EU's recovery long-term and embed it in the transition to climate neutrality by 2050 – rightfully a key policy priority of the EU.
- With a smaller Horizon Europe budget, the EU must invest sensibly. It must prioritise funding for those technologies that will deliver on the EU's energy & climate targets.

Action: members to reach out to national representatives (and inform the secretariat).

Action: members to share any intel/documents on upcoming programmes such as Horizon Europe and LIFE+ in particular.

5 Levelised societal cost of energy

Matthew Smith, Senior Consultant at Trinomics, gave a presentation on "Energy Costs, Taxes, Subsidies and Investment". The Energy Costs work is part of a series of flagship studies carried out for European Commission DG Energy on a regular basis, usually every two years. The aim of the work is to provide DG Energy with a complete and consistent set of data on energy generation costs, system costs and the costs of externalities. It will also account for the taxes, subsidies and investments in the energy section.

The full study will be published with the summary report in the upcoming months (October-November). The project is led by Trinomics in collaboration with Enerdata, Cambridge Econometrics, VITO, TML and WENR.

External cost of energy

The study on external cost of energy provides the full range of disaggregated external costs data, together with estimates of the legal and regulatory costs of different technologies. The approach was based on a) life cycle assessment, b) country customisation and monetisation and c) analysis and reporting. The overall approach was scaled on EU and Member States level.

The study shows that from the different types of energy, biomass and fossils have the highest external cost. By contrast, wind and hydropower have the lowest external costs (3 €/MWh) of all energy technologies in the EU-

27. This is five times less than solar PV and nuclear, 20 times less than Natural Gas and 50 times less than other fossil fuels. The normalised external cost of electricity in the EU-27 was 59 €/MWh.

When calculating the total cost of energy, onshore wind is the cheapest source of electricity in the EU-27, followed by hydropower and offshore wind.

The total external cost of energy (electricity and heat) in the EU27 is €306 billion, whereas at a global level, the total cost is €4,000 billion. China accounts almost 50% of the global total external cost of energy.

Energy subsidies

In the EU subsidies are increasing, this is caused by both an increase in support for renewables and a stagnation of subsidies for fossil fuels. In spite of the rhetoric the EU and its Member States still provide €50 billion to fossil fuel in subsidies each year. This is the same amount as 10 years ago.

In terms of support for renewables, the increase was fastest between 2008 and 2012. This was driven by support to solar power. However, since 2013 support to wind energy has been growing, whereas support for solar has plateaued. Looking at solar power, the support per MWh is declining significantly, but it is still the highest (248 €/MWh in 2018).

6 R&I to deliver 450 GW of offshore wind workshop

EERA JP Wind and SETWIND Annual Event

The **EERA JP Wind & SETWIND Annual Event** (14-18 September) offered knowledge exchanges, networking opportunities and inspiration on new research topics. Its various sessions and workshops focused on R&I priorities and technology development visions for the wind energy research community. For further information, visit their website.

ETIPWind workshop

The **ETIPWind workshop on "Research & Innovation to deliver 450 GW of offshore wind"** is now available online. The workshop was in collaboration with the EERA JP Wind and SETWIND Annual Event 2020. Experts from the industry and the research community discussed the technology pathways to deliver 450 GW of offshore wind in Europe. Together with the participants they identified how to scale up offshore technology and how to successfully install and manage these large volumes of offshore wind. See the video here.

7 AOB

No other topics were raised by the EXCO members.

8 Closing remarks & next steps

Adrian Timbus suggested to set up a next call to discuss the 2021 publication in more details. The call should be in October and scheduled as soon as possible so that agendas can be cleared.

The next online meeting was scheduled to be on Thursday 3 December 2020. The secretariat might propose an alternate date to better suit the timeline of the 2021 publication (see above).

9 List of participants

Organisation	Representative
ABB	Adrian Timbus
Acciona	Mikel Sojo
DNV GL	Lars Landberg
EAWE	Johan Meyers
EDF	Anastasiya Shapochkina
EERA (DTU)	Nicolaos Cutululis
EERA (DTU)	Niels Peter Hauge Madsen
EERA (DTU)	Mattias Anderson
EERA (ForWind)	Stephan Barth
EERA JP Wind (Fraunhofer IWES)	Arno van Wingerde
EERA JP Wind (ORE Catapult)	Paul Mckeever
EERA (SINTEF Energy Research)	John Olav Tande
EERA (TNO)	Peter Eecen
ENEL Green Power	Giancarlo Potenza
Equinor	Hanne Wigum
Iberdrola Energía Renovables	César Yanes Baonza
InnoEnergy	Javier Sanz
LM Wind Power	John Korsgaard
MHI Vestas Offshore Wind	Anders Bach Andersen
Ørsted Wind Power	Jørn Scharling Holm
RES	Mike Anderson
RWE Renewables International	Victoria Dahmen
Shell Energy Europe (observer)	Wouter Haans
Siemens Gamesa Renewable Energy	Aidan Cronin

Trinomics (speaker)	Matthew Smith
UL	Thomas Neumann
WEAMEC (observer)	Florent Vince
WindEurope	Alexander Vandenberghe
WindEurope	Daniel Fraile
WindEurope	Raquel Alemañ
WindEurope	Viktoriya Kerelska
ZF	Bert Verdyck