

ETIP Wind Steering Committee meeting



Funded by
the European Union

19 November 9:30-12:00

Online

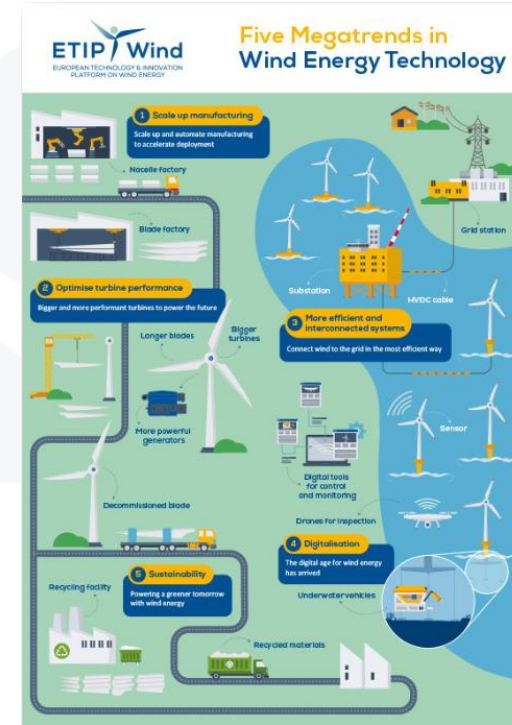
Welcome & Introduction

Stephan Barth
ForWind Managing Director
ETIPWind Vice-Chair

Key achievements since last meeting



Public workshop in Brussels on long-term R&I priorities



Dissemination at external events



New publications (factsheet and joint report on offshore renewables)

Offshore renewables paving the way for a competitive and climate-neutral Europe by 2050



etipwind.eu

Objectives of today's meeting

- Validate the methodology to develop the ETIPWind's roadmap
- Start establishing the Working Groups to develop the ETIPWind's roadmap
- Clarify our proposal to establish a wind R&I partnership's and discuss next steps in terms of advocacy

Agenda

9:30-9:40	Welcome & Introduction <i>Inc. key achievements since last meeting</i>	Stephan Barth, ETIPWind Vice-Chair
9:40-10:00	EU policy update <i>Inc. different reports, hearings, update on Horizon Europe calls, Innovation Fund results</i> <i>10mn presentation + 10mn Q&A</i>	ETIPWind Secretariat
10:00-10:30	ETIPWind Roadmap – Presentation of objective, methodology and timeline	ETIPWind Secretariat
10:30-11:00	ETIPWind Roadmap – Discussion and composition of Working Groups	ETIPWind Secretariat
11:00-11:15	<i>Coffee break</i>	
11:15-11:45	Update on Wind R&I partnership's advocacy <i>Based on clarifying notes shared in advance, report from meetings we had with DG RTD, etc.</i> <i>15mn presentation + 15 Q&A</i>	ETIPWind Secretariat
11:45-12:00	ETIPWind work programme 2025 <i>Inc. event with policymakers, C&D activities, etc.</i> <i>5mn presentation + 10 Q&A and additional suggestions</i>	ETIPWind Secretariat
12:00	Closing remarks	Stephan Barth, ETIPWind – Vice-Chair

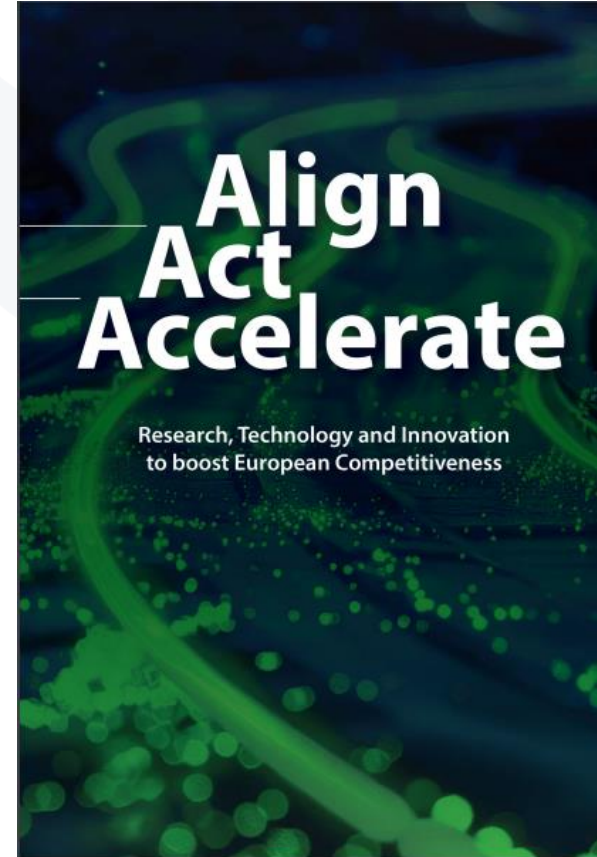
EU Policy update

Capucine Vannoorenberghe
ETIPWind Secretariat

Competitiveness as the main priority for the new Commission



Mario Draghi delivers his report on the future of European Competitiveness to Ursula von der Leyen.



Heitor report on the role of Research, Technology and Innovation to boost European Competitiveness

New Commissioners hearings



Hearing from **Stephane Séjourné**, Designate Executive Vice-President for Prosperity and Industrial Strategy

Hearing from **Dan Jørgensen**, Commissioner for Energy and Housing



Hearing from **Teresa Ribera**, Designate Executive Vice President for the Clean, Just and Competitive Transition

New Commissioners hearings



Hearing from **Wopke Hoekstra**,
Designate Commissioner for Climate,
Net Zero and Clean Growth

Hearing from **Ekaterina Zaharieva**, Commissioner for
Startups, Research and Innovation



Update on the next Horizon Europe Work Programmes

Horizon Europe Work Programme 2023-2024

-Still two ongoing calls for proposals for wind energy:



Demonstrations of innovative floating wind concepts

Deadline: 4 February



Minimisation of environmental, and optimisation of socio-economic impacts for offshore wind farms

Deadline: 4 February

Horizon Europe Work Programme 2025

- Will be officially published early next year.
- 3 calls for proposals on wind energy:



Innovative manufacturing of wind energy technologies

Deadline: end of 2025

Budget: €21m, 3 projects



Improved reliability and optimised operations and maintenance for wind energy systems

Deadline: early 2026

Budget: €15m, 3 projects



Understand and minimise the environmental impacts of offshore wind energy

Deadline: early 2026

Budget: : €15m, 3 projects

Results from the last Innovation Fund call



- Results from the last call launched in 2023.
- 6 wind energy projects got funding from the clean tech manufacturing window.
- EU contribution between €20m and €160m.

➤ **Next IF Call will open on 3rd December 2024!**

Next Gen Wind project	Manufacturing wind turbine power trains	Germany
NEMO project	Manufacturing offshore wind turbines	Denmark
PRIVOT project	Manufacturing and assembly of the most powerful offshore turbines	Denmark
CASTRO project	Pilot to design and build a turbine with a new rotor design	Denmark
WINDPL project	Manufacturing XXL offshore wind towers	Poland
NEFO project	Manufacturing of wind turbines	Spain

ETIPWind Roadmap

Capucine Vannoorenberghe
ETIPWind Secretariat

Objectives of the roadmap

1. Our main document **to advocate for a partnership on wind R&I**, basis for the partnership programme
– *Main doc to get Commission and Member States involved*
2. Provide **recommendations on optimisation of EU funding programmes** – *Serve as a position paper for next EU Budget (2028-2034)*
3. Clear description of wind sector R&I needs to achieve long-term targets (key R&D milestones)
– *To clarify our needs to the European Commission*

Suggested structure of the roadmap

Chapters	Content	Objective
1) Introduction	Context, reminder of EU policies and targets, key role of R&I for competitiveness, the SET Plan and the IWG Wind targets. 2 pages	Set the scene, remind the EU policy context, and clarify the role of the SET Plan.
2) Current funding support for wind R&I	<ul style="list-style-type: none"> - Summary of the EU funding programmes' in-depth analysis (full analysis in Annex 1) - Examples of projects funded by the Member States (outcomes of the IWG Wind's survey). 3 pages 	<p>Assessment of funding gaps, acknowledgment of what has been done, identification of what does not work in the EU funding programmes.</p> <p>= Arguments of why we need to boost R&I efforts.</p>
3) R&I needs to achieve long-term targets	Defined based on ETIPWind SRIA and EERA JP Wind long-term research programme 6 pages	Description of what we need concretely in each R&I areas to achieve our long-term targets (e.g. big demo projects, market incentives, basic research)
4) Implementation	The role of each stakeholder in the implementation of the R&I priorities (EU, MS, sector) and proposed tools and framework to address that: recommendations for optimisation of EU funding programmes, partnership on wind R&I. 4 pages	Provide recommendations to the European Commission for the next MFF and make the case for our partnership on wind R&I.
5) Conclusion	One pager with our key recommendations – 1 page	Sweet and short summary

Methodology to develop the roadmap

Chapters	Content	Who is in charge
1) Introduction	Context, reminder of EU policies and targets, key role of R&I for competitiveness, the SET Plan and the IWG Wind targets. 2 pages	Secretariat
2) Current funding support for wind R&I	<ul style="list-style-type: none"> - Summary of the EU funding programmes' in-depth analysis (full analysis in Annex 1) - Examples of projects funded by the Member States (outcomes of the IWG Wind's survey). 3 pages	Secretariat
3) R&I needs to achieve long-term targets	Defined based on ETIPWind SRIA and EERA JP Wind long-term research programme 6 pages	Secretariat ETIPWind Working Groups
4) Implementation	The role of each stakeholder in the implementation of the R&I priorities (EU, MS, sector) and proposed tools and framework to address that: recommendations for optimisation of EU funding programmes, partnership on wind R&I. 4 pages	Secretariat ETIPWind taskforce
5) Conclusion	One pager with our key recommendations – 1 page	Secretariat

Methodology to develop the roadmap

Chapter 3 – R&I needs

ETIPWind Working Groups (WGs):

- **Objective:** Define the R&D milestones needed to achieve long-term targets. Based on strategic docs previously developed.
- **Format:** 5 thematic WGs on 5 main R&I areas.
- **Participants:** At least 5 experts (inc. representatives from industry and from EERA (preferably people in charge of drafting SRIA and NeWindEERA docs).
- **Meetings:** 2-3 WG calls from December to February 2025.

Chapter 4 – Implementation

ETIPWind Task Force (TF):

- **Objective:** To agree on key recommendations to optimise EU funding programmes.
- **Format:** Only one TF.
- **Participants:** SC members or colleagues knowledgeable or with experience with EU Funding programmes. Organisations who already submitted proposals for IF or HEU.
- **Meetings:** 1-2 TF call from December to February 2025.

Example of R&I needs to achieve long-term targets

For the R&I area on Sustainability & Circularity (inc. 2 first topics)

Reminder: Wind energy long-term targets by 2050, agreed during last ETIPWind workshop

1. The European wind industry is healthy and competitive at the global scale.
2. The European industry harnessed the potential of digitalisation, automation with high cybersecurity standards.
3. Wind is the backbone of a climate-neutral energy system centered around electrification.
4. Wind farms are fully recyclable and have a positive environmental impact.
5. Society actively supports and recognises wind energy as indispensable for European prosperity and climate-neutrality.

Sustainability and Circularity

€550m

Material substitution

€105 million



Develop and demonstrate new materials to further reduce wind energy's environmental impact and lower dependency on critical raw materials.



Recycling methods for wind turbine materials

€110 million



Develop and demonstrate recycling and re-use solutions for all wind turbine materials. R&I should assess pathways to closed-loop circularity.

Lifetime extension

€80 million



Develop new tools to better assess the condition and performance of wind turbine components and materials to facilitate validation for lifetime extension, re-use or re-purposing.

New decommissioning tools

€120 million



Develop new tools and methods to decommission retired assets with lower environmental impacts and more opportunity to reuse and recycle components and materials.

Biodiversity solutions

€135 million



Fundamental research to assess (cumulative) environmental impacts from wind energy installation and operation procedures. Demonstration of nature-positive strategies and technologies including new mitigation technologies for wildlife.

Sustainability and Circularity



Inspired by IEA Wind and ETIPWind activity, this R&I priority theme focuses on several topics including environmental co-design, social aspects of wind energy development, sustainable materials, and reuse and recycling. It also identifies the need to research end-of-life management, life cycle assessment, and new business models for reusing materials.

PRIORITY SUB-THEMES



**Material substitution
for decarbonisation**



Recycling methods



**Lifetime extension
via re-using,
refurbishing and re-
purposing**



**New
decommissioning
tools and methods**



**Biodiversity
solutions**

RESEARCH TOPICS

Sustainable materials in design and recyclability by design

New components and materials

Material durability and protection

Alternative design solutions

Blade recycling, sustainability assessment and technologies to lower CO2 footprint

Reliability of secondary materials

New recycling process

Holistic life cycle assessment

New business models

Solutions for lifetime extension,

End-of-life management

Assessment of the damage state of turbine properties

Decommissioning methods and tools for offshore wind

Technologies for environmentally friendly decommissioning

Processes and components to ease reuse and recycling

Economic model for full decommissioning project cycle

Environmental co-design

Impact on ecosystems and biodiversity

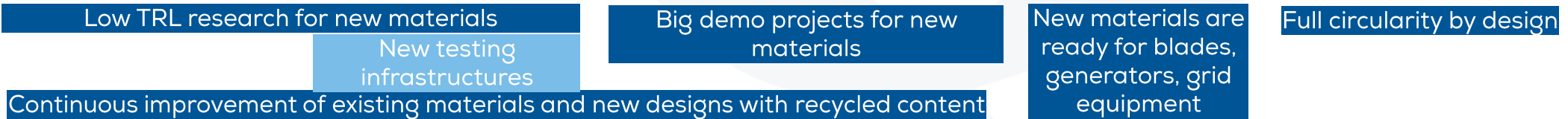
Noise reduction

Long-term target: By 2050, wind farms are fully recyclable and have a positive environmental impact

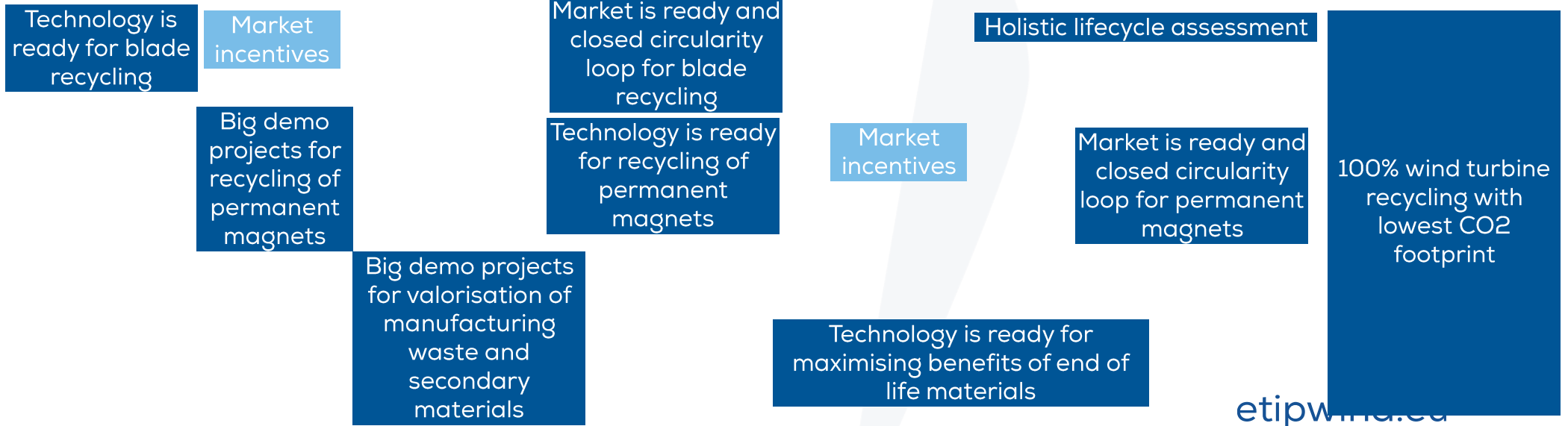
Policy / Capacity targets
 R&D milestone / Key activities
 Other needs



Material substitution

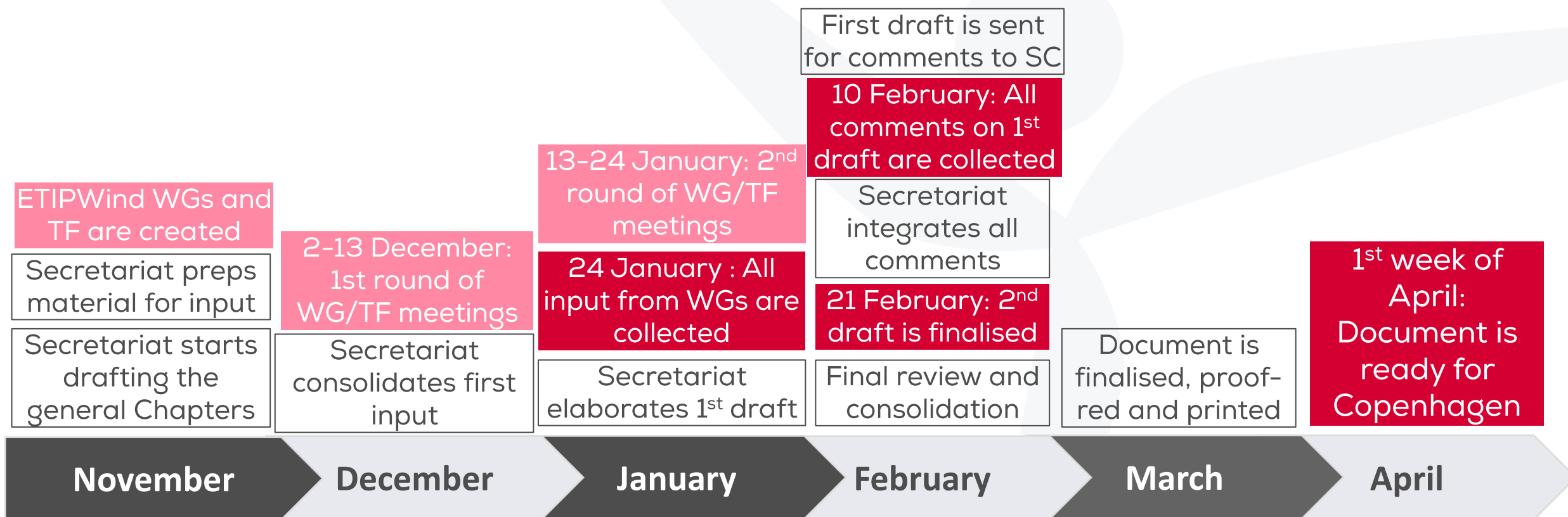


Recycling methods



Continuous research for scaling up recycling processes and new methods

Expected timeline for the roadmap



Q&A / Discussion time

Do you agree with the suggested objective, process and timeline to develop the ETIPWind roadmap?

Composition of the Roadmap Working Groups (WGs)

- You'll be able to register in Working Groups and Taskforce via **this shared registration file**.
- You can register **yourself and/or nominate an expert** from your organisation if needed (technical expert or in charge of EU funding)
- You can register in **one Working Group or more**.
- The registration file will also be shared via email, you'll have **until Wednesday 27 November** to register.

Coffee break 11:00-11:15

Update on Wind R&I partnership's advocacy

ETIPWind Secretariat + Stephan Barth,
ETIPWind Vice-Chair

Proposal for a large-scale partnership on wind R&I

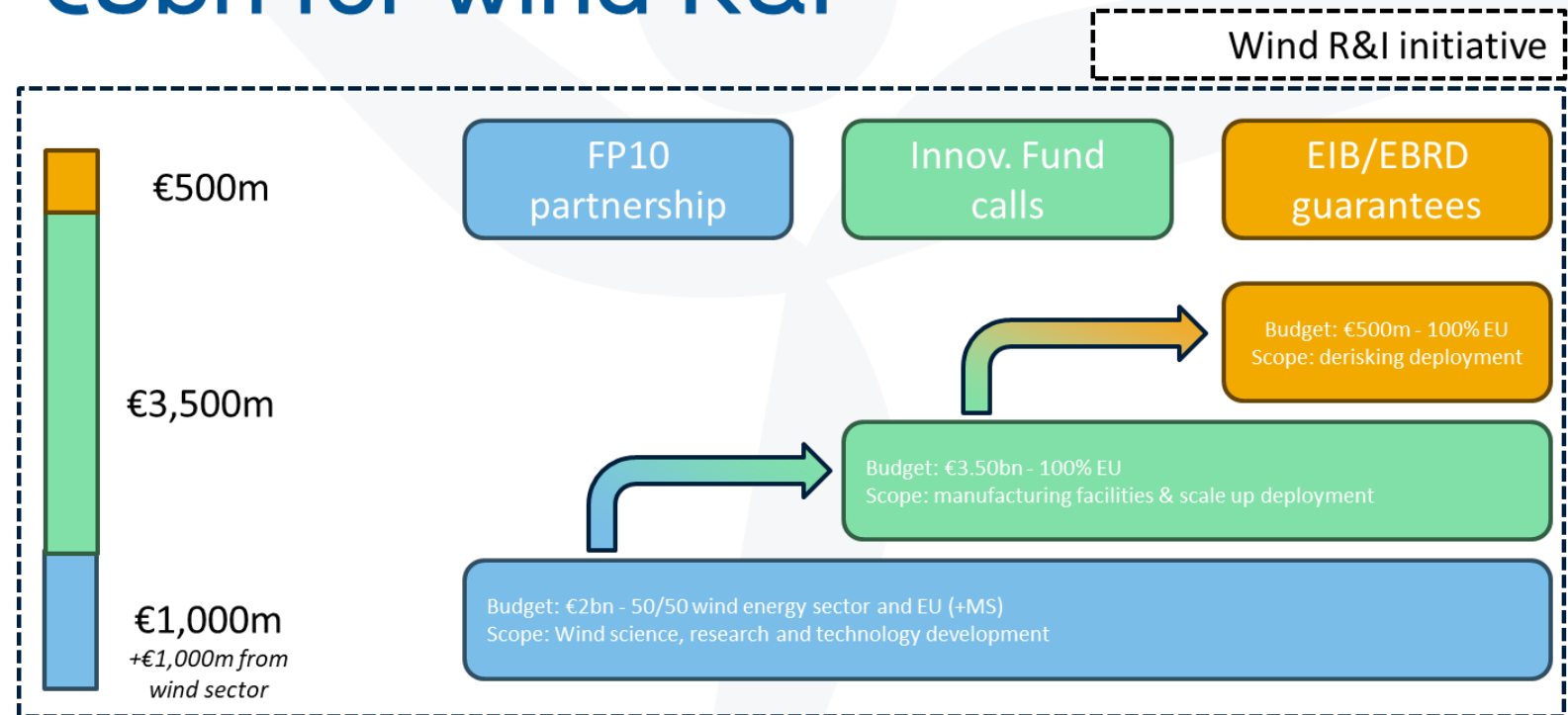
Context:

- EU R&I funding is **limited, difficult to secure, and diluted** across many small projects.
- **Lead times** are long and the **administrative processes**, both at application and actual project execution, are **cumbersome**.
- ETIPWind provides **recommendations** on the sector's R&I priorities. But no direct say on how much EU funding is made available and how it is allocated.
- **EU support for ETIPs** will reduce and is expected to end soon.

Proposal for a large-scale partnership on wind R&I

- A public-private partnership between industry/research, and European Commission.
- €1bn of EU funding between 2028 and 2034.
- Industry/research need to match the EU contribution with in-kind contributions.
- Additional €4bn funding unlocked through other EU tools (EIB, Innovation Fund, etc.)

€5bn for wind R&I



Clarifying notes on partnership's concept and possible structure

- **Rationale:** techno-specific budget, upfront visibility, wind sector co-decides what will get funding.
- **Legal structure:** Need separate legal entity which works like a mini-agency of the Commission.
- **Commitment:** Need to commit to an equal amount on R&I expenditure through signing a Memorandum of Understanding.
- **Governance:** Including a governing board, executive director, stakeholder group and Member State group.

Clarifying notes on partnership's concept and possible structure

But it also includes...

- List of other public-private partnerships
- Members in the existing public private partnerships
- Different types of contributions within a partnership
- Different governance structures within a partnership

Report on meeting with European Commission

Participants:

- **Rosalinde van der Vlies**, Director “Clean Planet”, DG RTD
- **Davide Amato**, Deputy Head of Unit, DG RTD (replacing Bernd Biervert)
- **Mathieu Fromentin**, Policy Officer, DG RTD

Report on meetings with European Commission (EC)

Key outcomes from discussion:

- The EC agrees with the partnership's idea and objective. Going forward, we should not be fixated on the terminology "**partnership**" as it is likely that all partnerships get rebranded in next EU Budget (2028-2034).
- We need to formalise the **Member States' engagement** on the need to establish a partnership on wind R&I. This is critical for the EC to move forward.
- The EC investigates whether they could pilot a **co-funded innovation action in the next Horizon Europe WP 2026-2027**. Including contributions from industry, Member States and EC.
- The EC is currently revising the **governance of the SET Plan**. They asked our input on how to revise the IWGs' roles and responsibilities.
- We discussed the potential benefits of more **real-size test benches to accelerate testing of innovations**. She was concerned about the issue.

Report on meetings with European Commission (EC)

Key action points from this meeting:

- We'll provide our **ideas of key challenges** that could be funded with a co-funded innovation action in next Horizon Europe WP.
- We'll identify **the EU Member States who can commit** on strengthening European collaboration for wind R&I.
- The **ETIPWind roadmap should focus on the implementation** of R&I priorities and have the endorsement from Member States.
- We'll provide a **list of recommendations** to improve the efficiency of the IWGs and overall governance of the SET Plan.
- We'll provide a **list of the existing testing infrastructures** available in Europe.

Next steps on wind R&I partnership's advocacy



**EU Member States
(Ministries/IWG Wind)**

Ensure R&I agenda is aligned with national priorities

Contribute with additional R&I projects at national level

Provide state aid or support for deployment / facilities



European Commission

Co-decides on EU funding allocation

Contributes with cash contributions

**Wind energy sector
(ETIPWind)**

Develops R&I agenda

Co-decides on EU funding allocation

Contributes with In-kind contributions

Large scale partnership on wind R&I



Next steps on wind R&I partnership's advocacy

Objective: Ensure the partnership for wind R&I is integrated in the European Commission's proposal for the next multi-annual framework programme 2028-2034. The proposal will be drafted by June 2025.

- **Additional meetings with European Commission:** DG ENER, DG GROW, DG CLIMA.
- Discuss with the industry how their **R&D contributions aligned with SRIA** could be calculated within the partnership.
- Engage with a group of EU Member States **to formalise their commitment** to boost European collaboration for wind R&I (at WindEurope's annual event in Copenhagen?)

Q&A / Discussion time

Is there anything still unclear regarding our proposal to establish a partnership on wind R&I?

Any remark on the outcomes of our meeting with DG RTD?

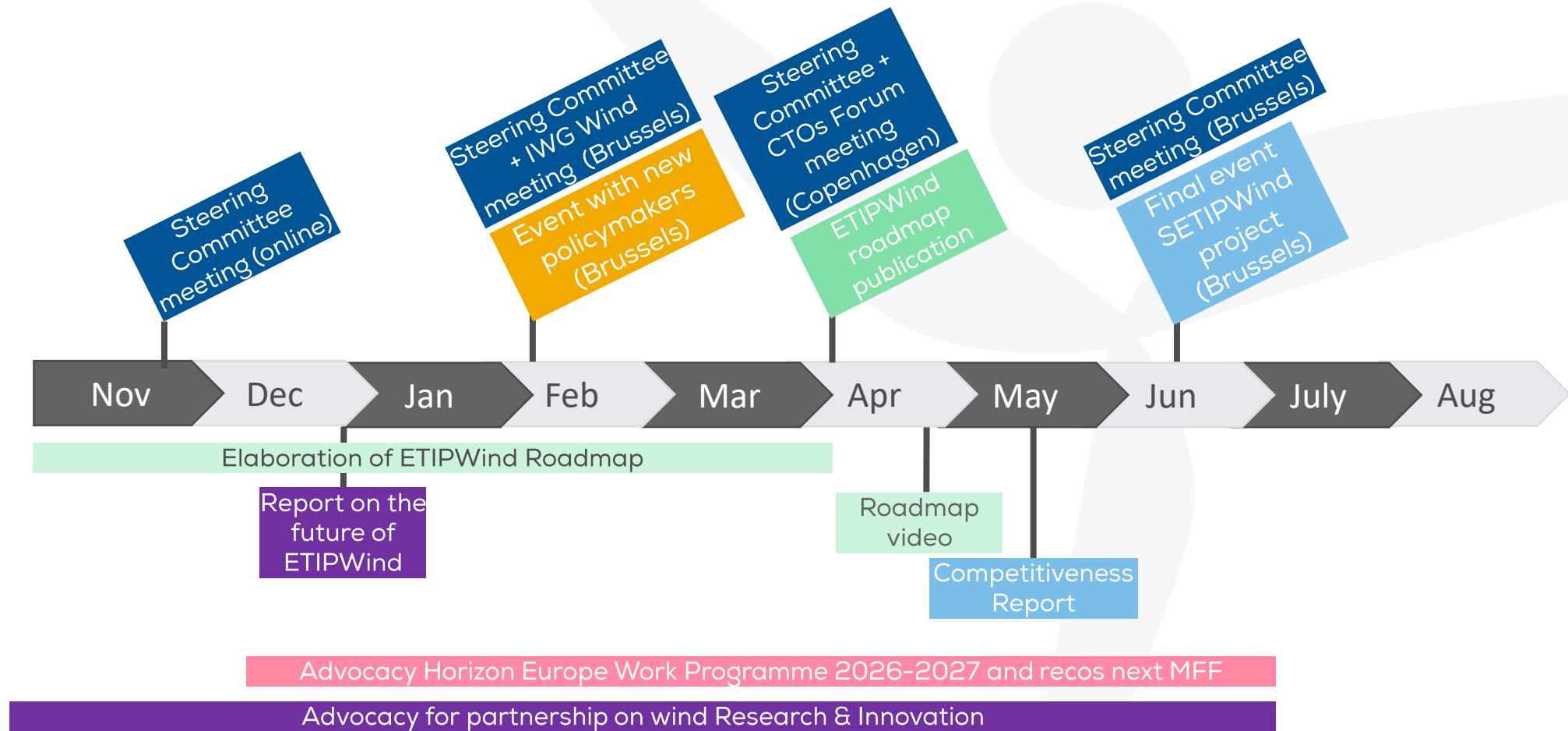
ETIPWind work programme 2025

Capucine Vannoorenberghe
ETIPWind Secretariat

Planned ETIPWind activities 2025

1. Roadmap elaboration and dissemination
2. Future of ETIPWind and advocacy for partnership
3. Advocacy next Horizon Europe Work Programme and optimisation of EU funding programmes
4. Engagement with new EU policymakers
5. Additional activities: SC meetings and ad-hoc reports

Upcoming activities and meetings



Closing remarks

Stephan Barth
ForWind Managing Director
ETIPWind Vice-Chair

Time for a group picture!

THANK YOU

Contact: secretariat@etipwind.eu