

ETIPWind Online Steering Committee meeting

Welcome & Introduction

Adrian Timbus
Vice President Portfolio and Market
Strategy - ETIPWind Chair

etipwind.eu

The ETIPWind roadmap: why?



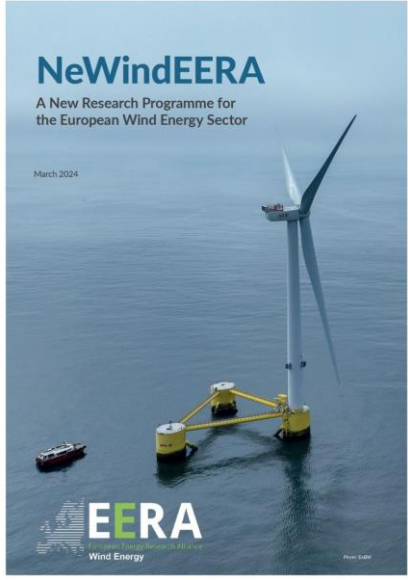
EU funding is not optimal, we need to change the mindset!
There's momentum (e.g. Draghi and Heitor reports). We need to provide recommendations on how to optimise EU funding in the next FP10.

The European wind sector agrees on a common R&I agenda by 2050. We need to show clarity and alignment on a common R&I programme. But we also need to align with EU Member States and the Commission.



Accelerate R&I efforts thanks to the establishment of a long-term R&I initiative. We need a document that explains why we need this initiative in the next EU budget 2028-2034, how it will help us achieve our long-term targets.

From the SRIA to the ETIPWind roadmap



Strategic Research
& Innovation Agenda
2025-2027
November 2023



| Strategic R&I Agenda | Roadmap |
|--|---|
| Describe short-term R&I needs for 2025-2027 | Describe R&I milestones to achieve long-term targets by 2050 |
| Focus on R&I activities (project level) | Focus on implementation (programme level) |
| Very detailed and prescriptive | Broader angle, long-term vision |
| Mostly text | Mostly visual (timeline) |
| Document only about R&I topics | Will also include policy recommendations |



ETIPWind
Roadmap

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Objectives of today's meeting

- Review the **R&I timelines and KPIs** developed by the ETIPWind Working Groups.
- **Gather all comments** from Steering Committee members so the Secretariat can consider them in developing the final version of the timelines / KPIs.
- Give an **update on the next steps** before finalisation of the ETIPWind roadmap.

Agenda

| | | |
|--------------------|---|--|
| 9:30-9:35 | Welcome & Introduction | Adrian Timbus, ETIPWind Chair |
| 9:35-9:50 | WG1 Timeline and KPIs <ul style="list-style-type: none">- Presentation (5mn)- Discussion (10mn) | ETIPWind Secretariat |
| 9:50-10:05 | WG2 Timeline and KPIs <ul style="list-style-type: none">- Presentation (5mn)- Discussion (10mn) | ETIPWind Secretariat |
| 10:05-10:20 | WG3 Timeline and KPIs <ul style="list-style-type: none">- Presentation (5mn)- Discussion (10mn) | ETIPWind Secretariat |
| 10:20-10:35 | WG4 Timeline and KPIs <ul style="list-style-type: none">- Presentation (5mn)- Discussion (10mn) | ETIPWind Secretariat |
| 10:35-10:50 | WG5 Timeline and KPIs <ul style="list-style-type: none">- Presentation (5mn)- Discussion (10mn) | ETIPWind Secretariat |
| 10:50-11:00 | Next steps and closing remarks | ETIPWind Secretariat + Adrian Timbus, ETIPWind Chair |

The background features a dense, repeating pattern of light blue line-art icons. These icons include wind turbines, solar panels, gears, lightbulbs, a globe, a pie chart, a bar chart, a leaf, a lightning bolt, a battery with a plus-minus sign, a magnifying glass, a checklist with 'R&I' at the bottom, and the letters 'EU'.

Review of R&I timelines and KPIs

ETIPWind Secretariat

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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 | Assessment of funding gaps, acknowledgment of what has been done, identification of what does not work in the EU funding programmes. = Arguments of why we need to boost R&I efforts. |
| 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 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 |

Reminder

R&I milestones - to achieve our long-term target by 2050

Definition: A R&I milestone can be defined as a major step that would be a gamechanger for the European wind energy sector. An innovation that must happen to reach our long-term target by 2050.

- To be defined based on previous documents.
- Limited number of milestones.
- Milestones are part of a long-term vision.

Example: Floating wind fully reaches commercial-scale, installation of offshore turbines have no negative impact on biodiversity.

Key Performance Indicators – to measure the progress towards the achievement of the milestones

Definition: measurable indicators that will help us track the progress towards our R&I milestones.

- Max 1-2 KPIs
- Should be easy to measure
- Should be general enough to cover all the R&I milestones

Example: manufacturing capacity (in GW), number of turbines installed

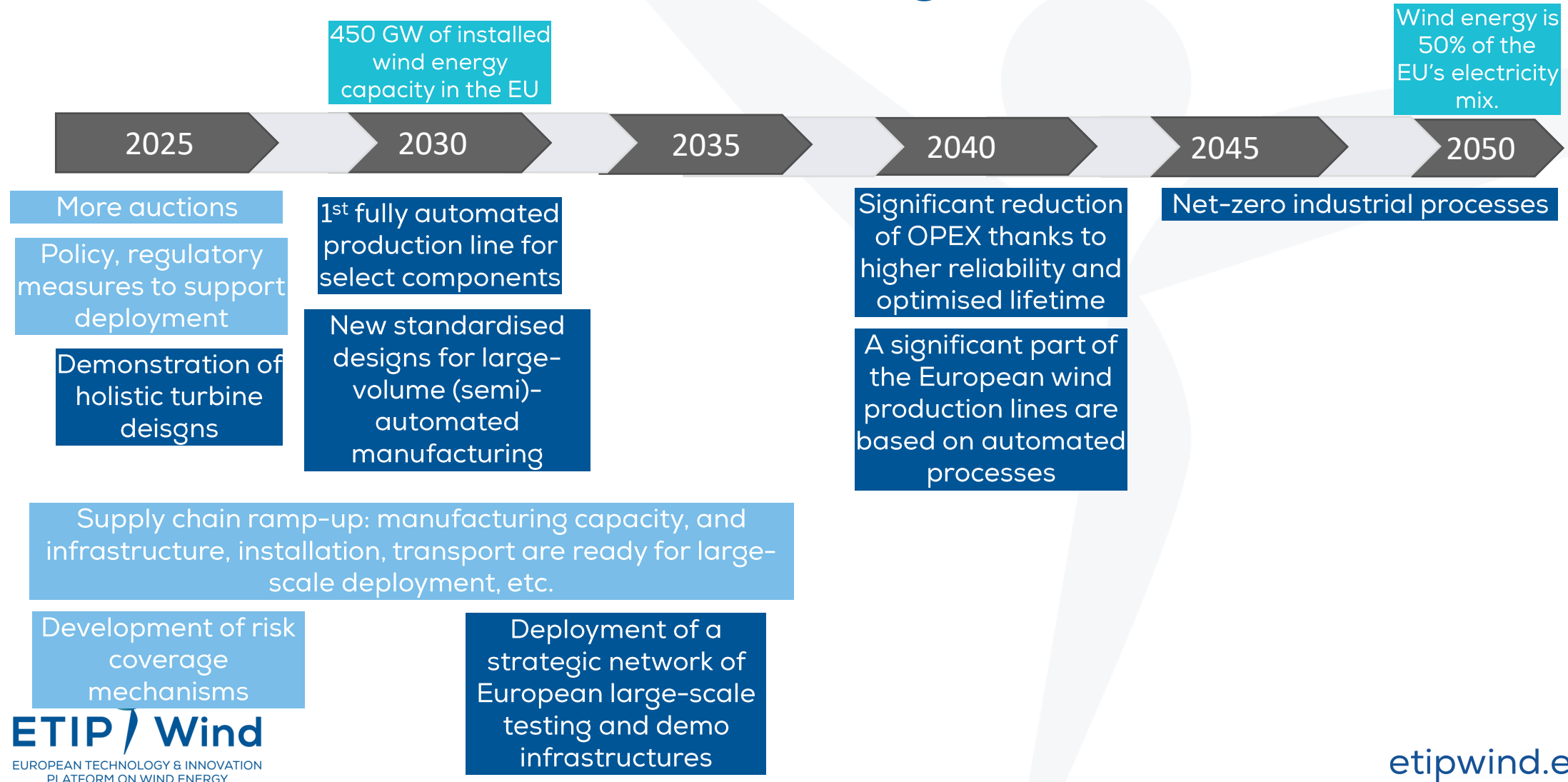
Long-term targets by 2050

1. By 2050, the European wind industry is healthy and competitive at the global scale.
2. By 2050, the European industry harnesses the full potential of AI, digitalisation, automation with high cybersecurity standards.
3. By 2050, wind is the backbone of a climate-neutral European energy system centered around electrification.
4. By 2050, wind farms are fully circular and have a positive environmental impact.
5. By 2050, society actively supports and recognises wind energy as indispensable for European prosperity and climate-neutrality.

WG1 – Industrialisation, scale-up, competitiveness

By 2050, the European wind industry is healthy and competitive at the global scale.

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



KPIs to measure R&I impact

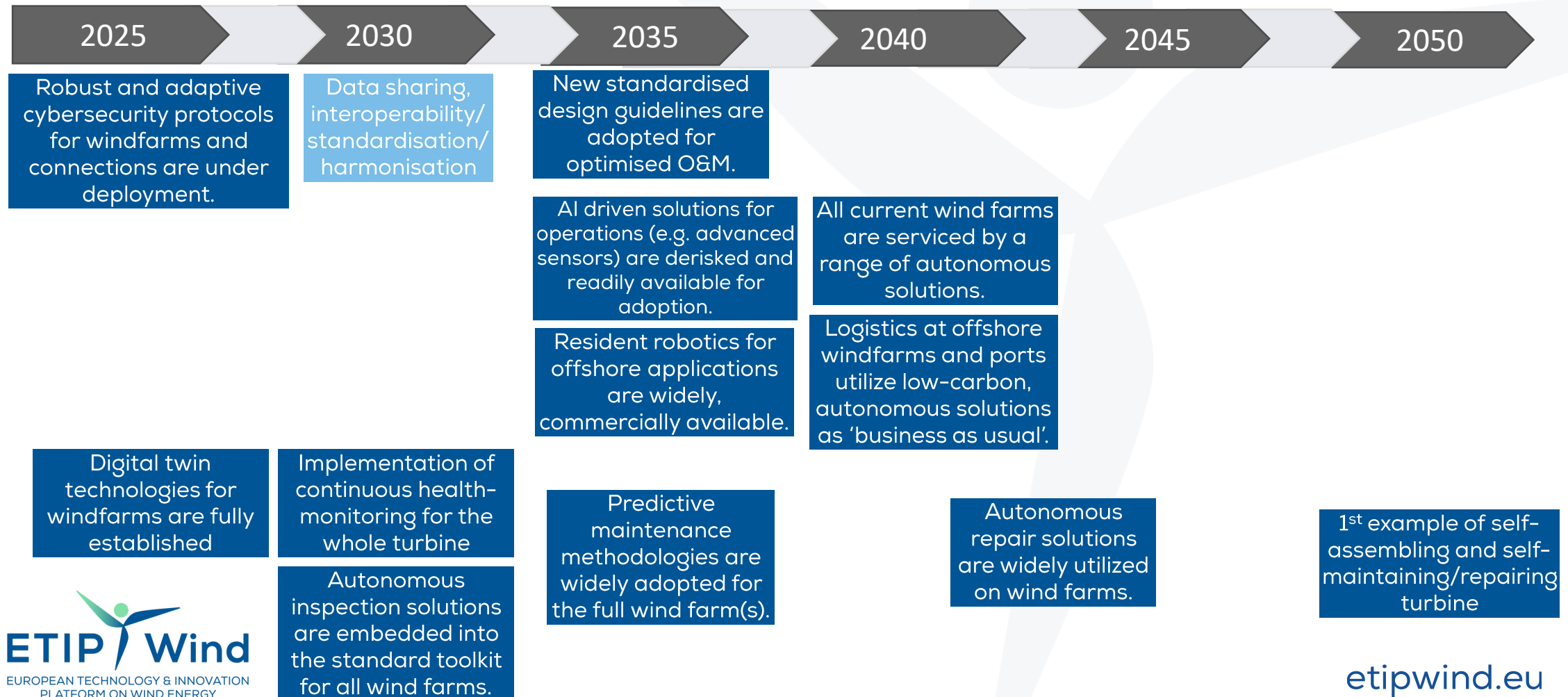
Industrialisation, scale-up and competitiveness:

- Turbine manufacturing capacity (MW per year). E.g. by 2030, Europe has doubled its wind manufacturing capacity. Installed capacity.

WG2 – Optimisation and further digitalisation of Operations & Maintenance

By 2050, the European industry harnesses the full potential of AI, digitalisation, automation with high cybersecurity standards.

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



KPIs to measure R&I impact

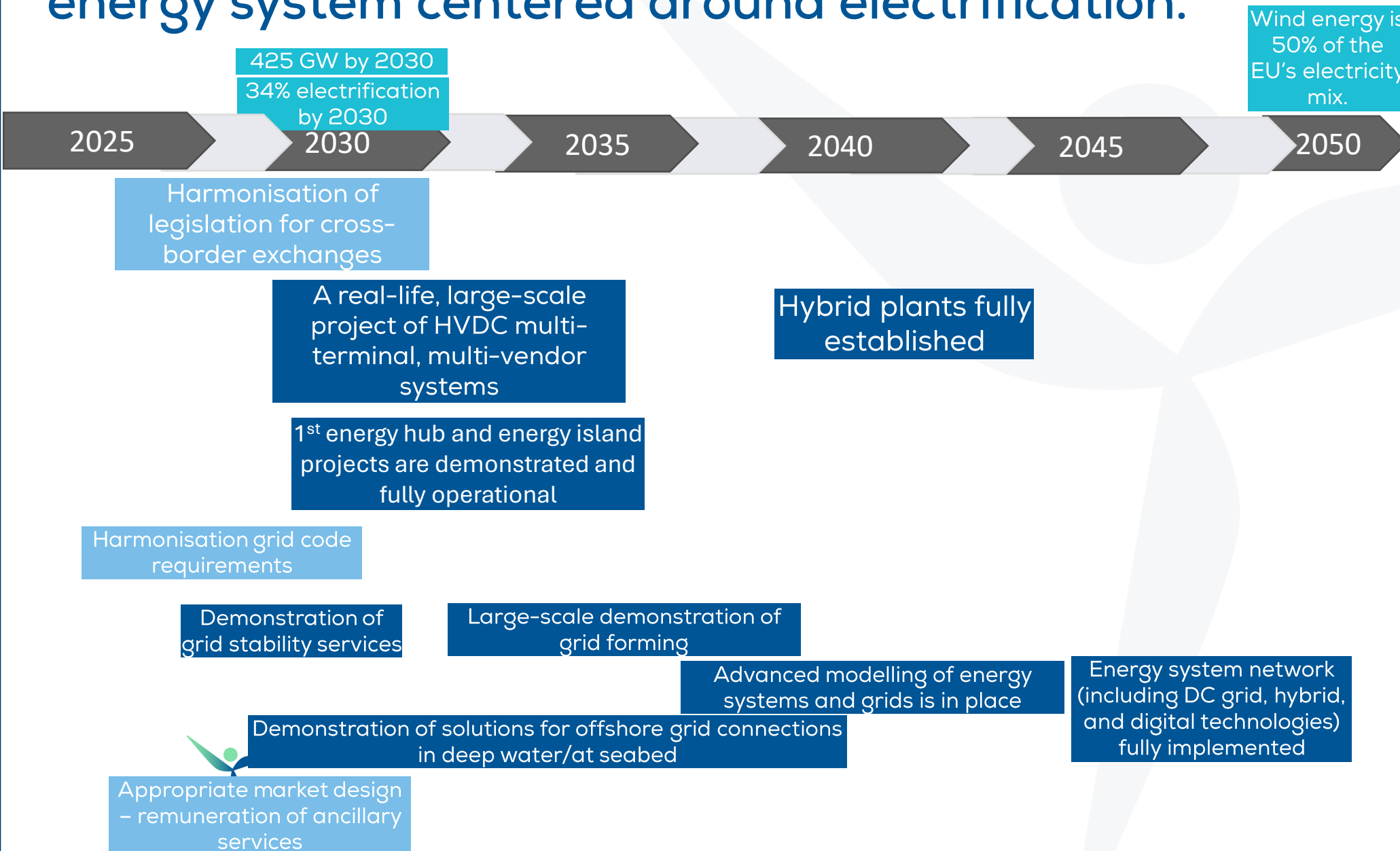
Optimisation and further digitalisation of Operations & Maintenance:

- Generation loss in MWh in the year based on wind turbine component downtime
- Cost-reduction of O&M activities (€/kW)

WG3 – Wind energy system integration

By 2050, wind is the backbone of a climate-neutral energy system centered around electrification.

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



KPIs to measure R&I impact

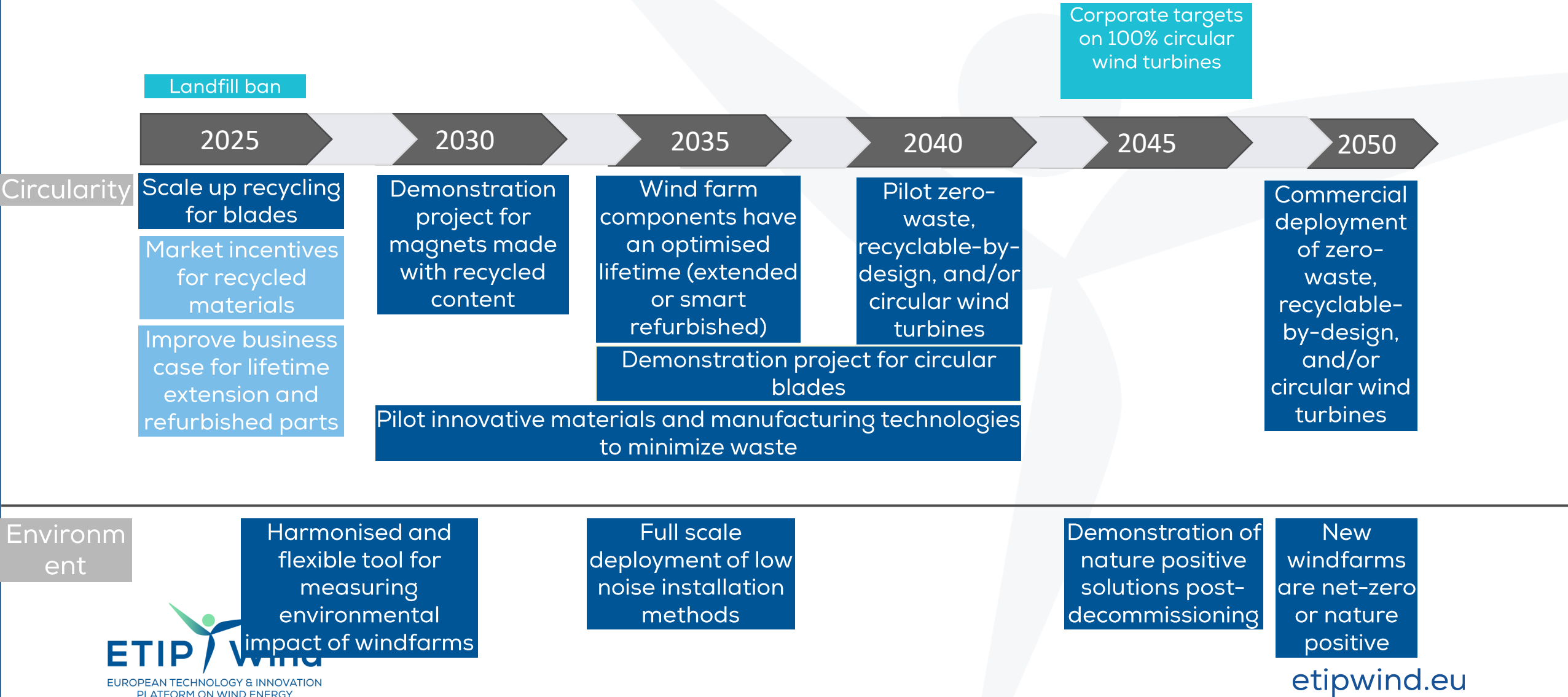
Wind energy system integration

- Increased share of wind energy integrated in the electricity mix.

WG4 – Sustainability & Circularity

By 2050, wind farms are fully circular and have a positive environmental impact.

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



KPIs to measure R&I impact

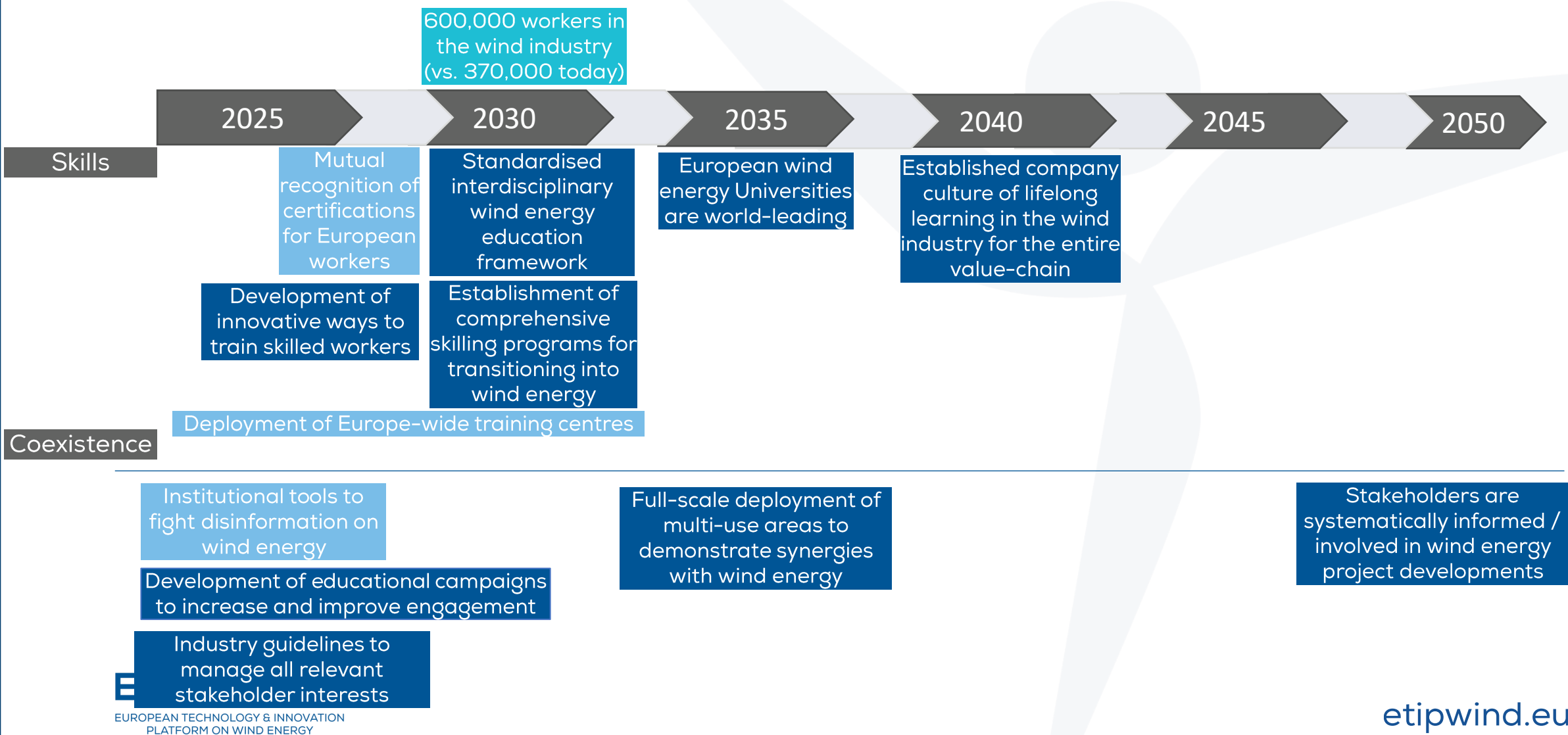
Sustainability and circularity

- Increase of circularity indicators for new turbines.
- Life-cycle assessment tools shows a reduction of carbon footprint of wind farms.

WG5 – Skills and Coexistence

By 2050, society actively supports and recognises wind energy as indispensable for European prosperity and climate-neutrality.

| |
|--------------------------------|
| Policy / Capacity targets |
| R&I milestone / Key activities |
| Other needs |



KPIs to measure R&I impact

Skills and Coexistence:

- **On skills:** 75% of workers received trainings by 2030. This should increase to 90% by 2040.
- **On education:** At least 4 European Universities are in the top-10 of the global wind energy education ranking.
- **On coexistence:** By 2050 all wind energy projects clearly communicate the benefits of wind energy for society and environment.

Next steps and Closing remarks

**ETIPWind Secretariat + Adrian Timbus,
ETIPWind Chair**

Next steps

ETIPWind roadmap:

- Roadmap first draft: ready by last week of February.
- Review of the first draft by Steering Committee: until beginning of March.

Save-the-date:

- Event at the European Parliament, 4 March (9:00-11:00), Brussels
- ETIPWind in WindEurope's annual event in Copenhagen, 8 April

Sponsored conference session: 11:15-12:15

ETIPWind Steering Committee + CTOs meeting: 14:00-16:00

Thank you!