



Wind Implementation Working Group

Online meeting

2 June 2023 (14:00-16:00)



Introduction

Objectives of the meeting today:

- Finalise the new SET Plan targets for wind energy
- Discuss our recommendations for the revision of the NECPs

Since our last meeting:

- Terms of Reference finalised
- New SET Plan targets discussed
- New IWG Wind member joined the group!

Agenda

14:00-14:05 **Welcome & Introduction**

14:05-14:15 **EU Policy Update** (NZIA, CRMA, RED, Revamp of the SET Plan)

New SET Plan targets for wind energy

14:15-15:25

Presentation of the proposed targets (15mn)

Discussion (45mn)

Finalisation and approval from IWG Wind members (10mn)

Recommendations for the revision of the NECPs

15:25-15:45

Tour de Table on status of the NECPs revision (10mn)

Discussion on a set of recommendations (10mn)

15:45-16:00

Conclusion and next steps

Welcome to our new member!

➤ **Dr. Bálint Hartmann**, Centre for Energy Research



Welcome to our new member!

➤ **Xavier Montagne**, MESR-DGRI





EU Policy Update



EU Net Zero Industry Act



- ❑ **36 GW target for annual wind turbines production**
- ❑ **Governments mandated to use up to 30% non-price criteria in auctions:**
 - Environmental Sustainability
 - Innovation
 - Energy System Integration
 - Supply chain resilience

BUT carve-outs if costs increase more than 10%
- ❑ **No Funding / Financing announcements**
 - These are left for the EU Sovereignty Fund
 - EU Innovation Fund not reshaped to support wind supply chain
 - Flexible EU State aid rules can help in the short-term only with CAPEX support

EU Critical Raw Materials Act



- ❑ Strict focus on **raw materials** e.g. rare earths, copper, lithium
 - Glass fibre fabrics / steel not in
- ❑ **2030 targets** for:
 - Mining capacity = 10% EU's annual consumption
 - Processing capacity = 40% EU's annual consumption
 - Recycling capacity = 15% EU's annual consumption
- ❑ Progressive approach to min. recycled content for **permanent magnets**
- ❑ Fast permits and easier financing for **Strategic Raw Materials Projects** in Europe or third countries

Final deal on EU permitting rules (in RED)

Revision of the Renewable
Energy Directive

#EUHaveyourSay



- ❑ **Overriding public interest**
- ❑ **Faster permitting** in & outside 'acceleration' areas
- ❑ Clarity on **deadlines**: deadlines & content
- ❑ **Population based approach**

Revamp of the SET Plan

- ❑ Increase **participation** and make it more **transparent**
- ❑ Renewed **SET Plan Steering Group**
- ❑ KPIs of the **Implementation Plan** will be revised
- ❑ Changes for some IWGs (e.g **Hydrogen, HVDC**)
- ❑ **Cross-sector issues** to be better addressed (digitalisation, skills, market uptake)
- ❑ Foster **collaboration** between ETIPs and IWGs.



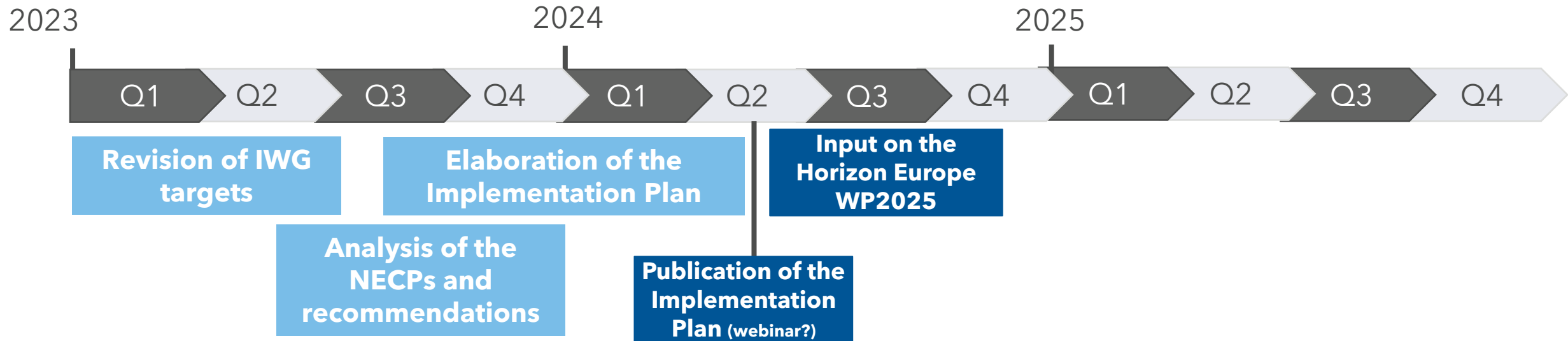
Revision of the SET Plan targets for wind energy



Guidelines for defining new SET Plan targets

- The new targets must contribute to the IWG Wind's main mission: **accelerating the wind energy deployment in Europe.**
- The new targets must be:
 - easy to **quantify**
 - easy to **monitor** (so the IWG Wind can report to the SET Plan Steering Group)
 - easy to **implement** at the national level.

Revision of the SET Plan targets for wind energy



Proposal of new SET Plan targets


1. **Above 3% of the total national Research & Innovation budget / or at least €X million must be dedicated to wind energy** or to research areas that contribute to accelerate the deployment of wind energy (technological or non-technological).
2. **A 2% increase of wind energy penetration must be reached by 2025 at the national level** supported by the implementation of R&I grid-related projects (HVDC, storage, flexibility solutions, hybrid projects, substations equipment, smart energy solutions, etc).
3. **At least 2 GW of wind manufacturing capacity must be added per year within the IWG Member States**, supported by the implementation of projects supporting wind manufacturing capacity (automation, optimisation of manufacturing processes, optimisation of materials use, logistics, supply-chain etc).
4. **At least 3 demonstration project dedicated to blade recycling with a total of €X million funding** must be implemented at the European level by 2025.
5. **At least 100 000 workers must be trained by 2025 at the EU level**, supported by national funding dedicated to researchers, universities, training centres, etc.
6. **At least one research project leading to decrease the permitting approval time for wind energy projects (below 2 years for onshore, below 3 years for offshore) must be implemented per year at the national level.** Research activities can include environmental impact assessment, co-use of spaces, acceptability, system integration, digitalisation, better design of turbines, etc.

Target 1 - R&I budget

Above 3% of the total national Research & Innovation budget / or at least €X million must be dedicated to wind energy or to research areas that contribute to accelerate the deployment of wind energy (technological or non-technological -> O&M and installation,).

New proposal: At least X% increase in the R&I funding spent on wind energy / year at national level or to research areas that contribute to accelerate the deployment of wind energy (technological or non-technological).

Based on IEA methodology



IEA table + OECD library



Analysis rationale



Proposal

Target 2 - Wind energy penetration

A 2% increase of wind energy penetration must be reached by 2025 at the national level supported by the implementation of R&I grid-related projects (HVDC, storage, flexibility solutions, hybrid projects, substations equipment, smart energy solutions, O&M and installation, etc).

New proposal: At least a 0.5% increase of wind energy penetration / year at the national level (to contribute to the target of 440GW of installed capacity by 2030 at the EU level) supported by the implementation of R&I grid-related projects (HVDC, storage, flexibility solutions, hybrid projects, substations equipment, smart energy solutions, etc).



Data per country



How we track it

Target 3 - Wind manufacturing capacity

At least 2GW of wind manufacturing capacity must be added per year **within the Member States**, supported by the implementation of R&I projects supporting wind manufacturing capacity (automation, optimisation of manufacturing processes, optimisation of materials use, logistics, supply-chain etc).

Measuring the additional capacity added by the projects at the national level. Project coordinators will have to estimate the additional capacity of their projects (exploitation plan?)

In line with the latest proposal for a Net Zero Industry Act.

Exploitation guidelines from the EC?

https://research-and-innovation.ec.europa.eu/strategy/dissemination-and-exploitation-research-results_en

Target 4 - Recycling

At least 3 demonstration project dedicated to blade recycling with a total of **€X million** funding must be implemented at the European level by 2025.

Every MS needs a dedicated budget on technologies for materials recovery including recycling .

Aligned with CRMA: By 2030 + rare earth materials or critical raw materials.

Target 5 - Jobs & Skills

At least 100 000 workers must be trained by 2025 at the EU level, supported by national funding dedicated to researchers, universities, training centres, etc.

<https://ec.europa.eu/social/BlobServlet?docId=24824&langId=en>

In line with the Partnership for Offshore Renewable Energy Skills.

Target 6 - Permitting

At least one research project leading to decrease the permitting approval time for wind energy projects (below 2 years for onshore, below 3 years for offshore) must be implemented per year at the national level.

Research activities can include environmental impact assessment, co-use of spaces, acceptability, system integration, digitalisation, better design of turbines, etc.

In line with the latest developments of the Renewable Energy Directive.

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Recommendations for the revision of the National Energy & Climate Plans (NEPCs)





Tour de Table

What is the status of the NECPS revision at your national level?

Discussion on a set of recommendations

- Guidelines from the European Commission
- New SET-Plan targets for wind energy
- WindEurope's analysis of the previous NECPS

Conclusions and next steps

- The Secretariat will provide a **final version of the SET Plan targets**, to be agreed as soon as possible.
- **NECPs revision**: The Secretariat will adapt recommendations for the NECPs revision. IWG Wind members will forward recommendations to their national governments.
- **Next IWG Wind meeting**: In September to discuss the analysis of the revised NECPS.
- Next **SET Plan Conference, 13-14 November** in Barcelona -> **Please save the date for in-person IWG Wind meeting!**
- Invitation to participate to the **online meeting of the new TWG on Green Hydrogen** (5 June, 10:00-11:00)
- **SET Plan progress report 2023**: Input by 16 June.

Wind Implementation
Working Group

Thank you!

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