

Increasing wind energy investments in the Energy Community

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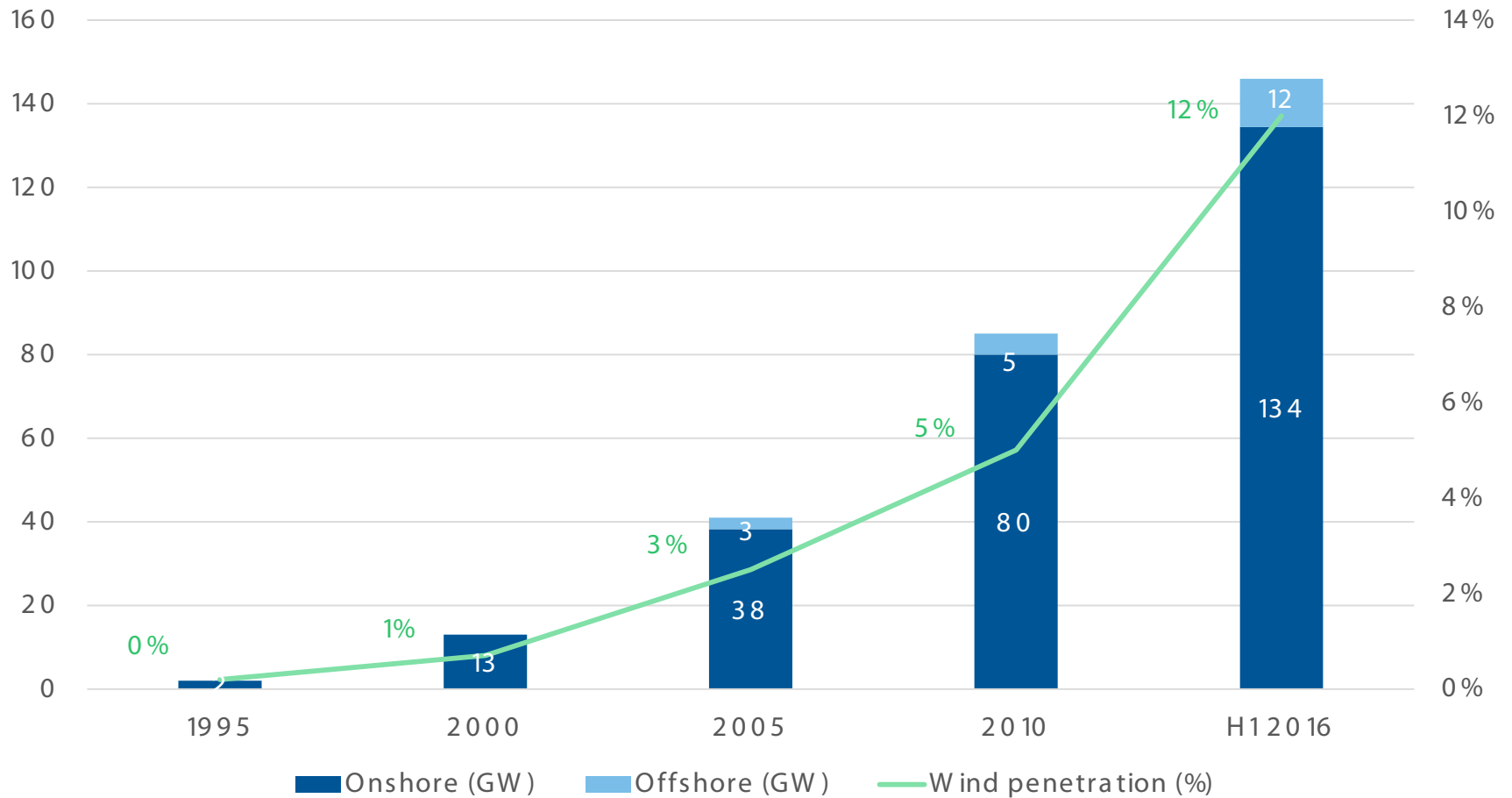
40+
COUNTRIES

500+
MEMBERS

- Component/Materials/Equipment manufacturer
- Developer/Asset owner/Power producer
- Installation/Logistics
- Insurance/Banks
- Operations & Maintenance
- R&D/Universities/Institutes
- Shipyards/Ports
- Associations (wind and renewables)

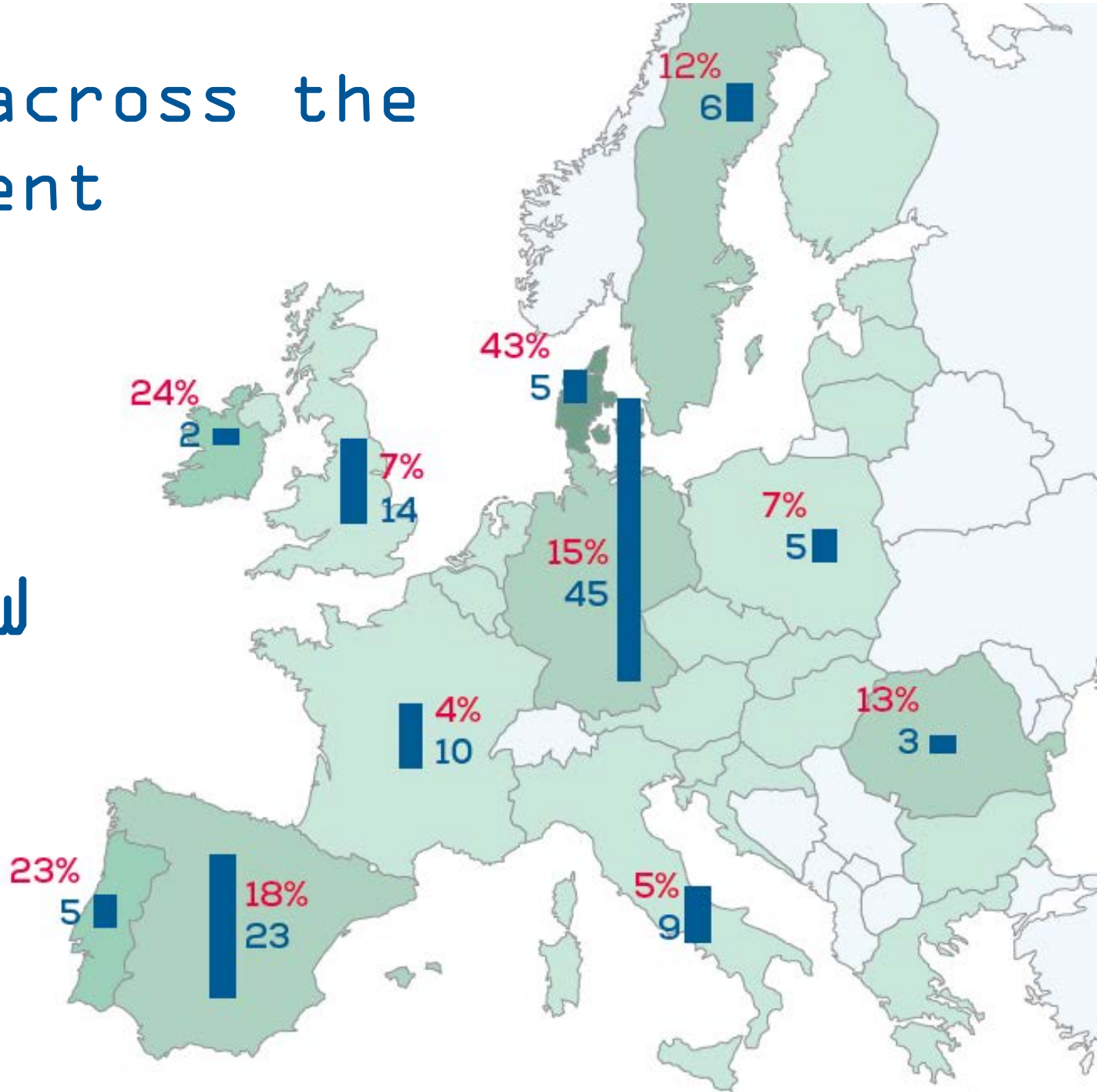
The state of Europe's wind industry

Decades of growth

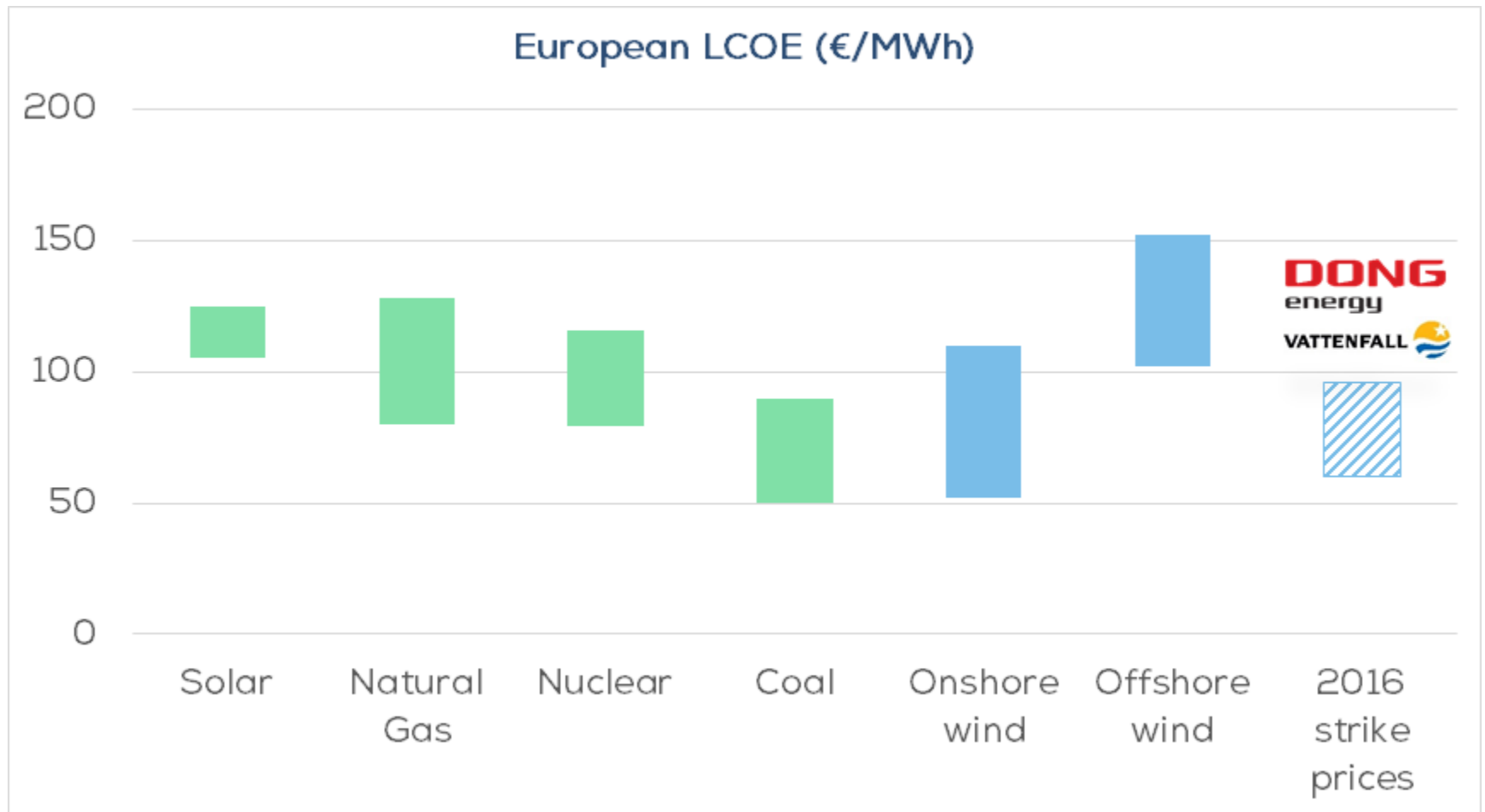


Power across the continent

146GW

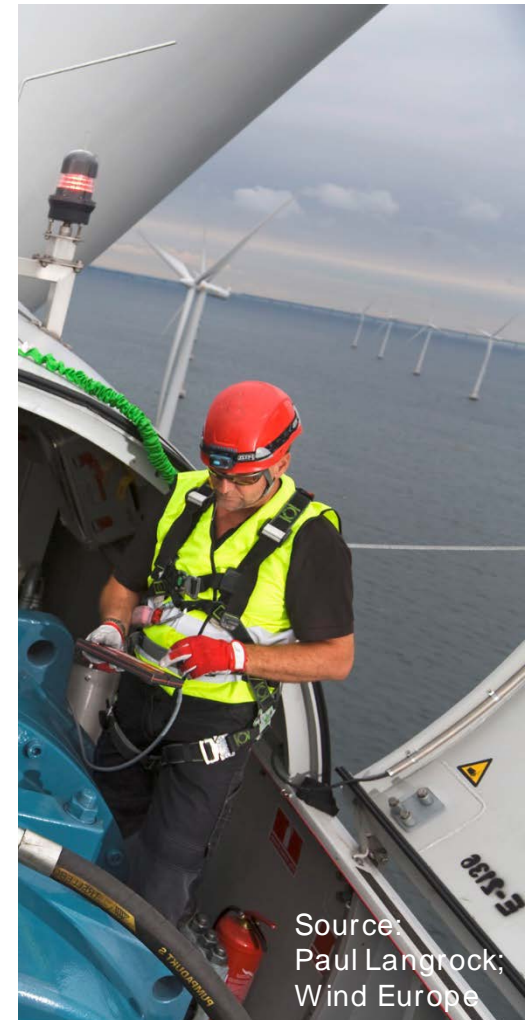


Fully competitive



Economic output

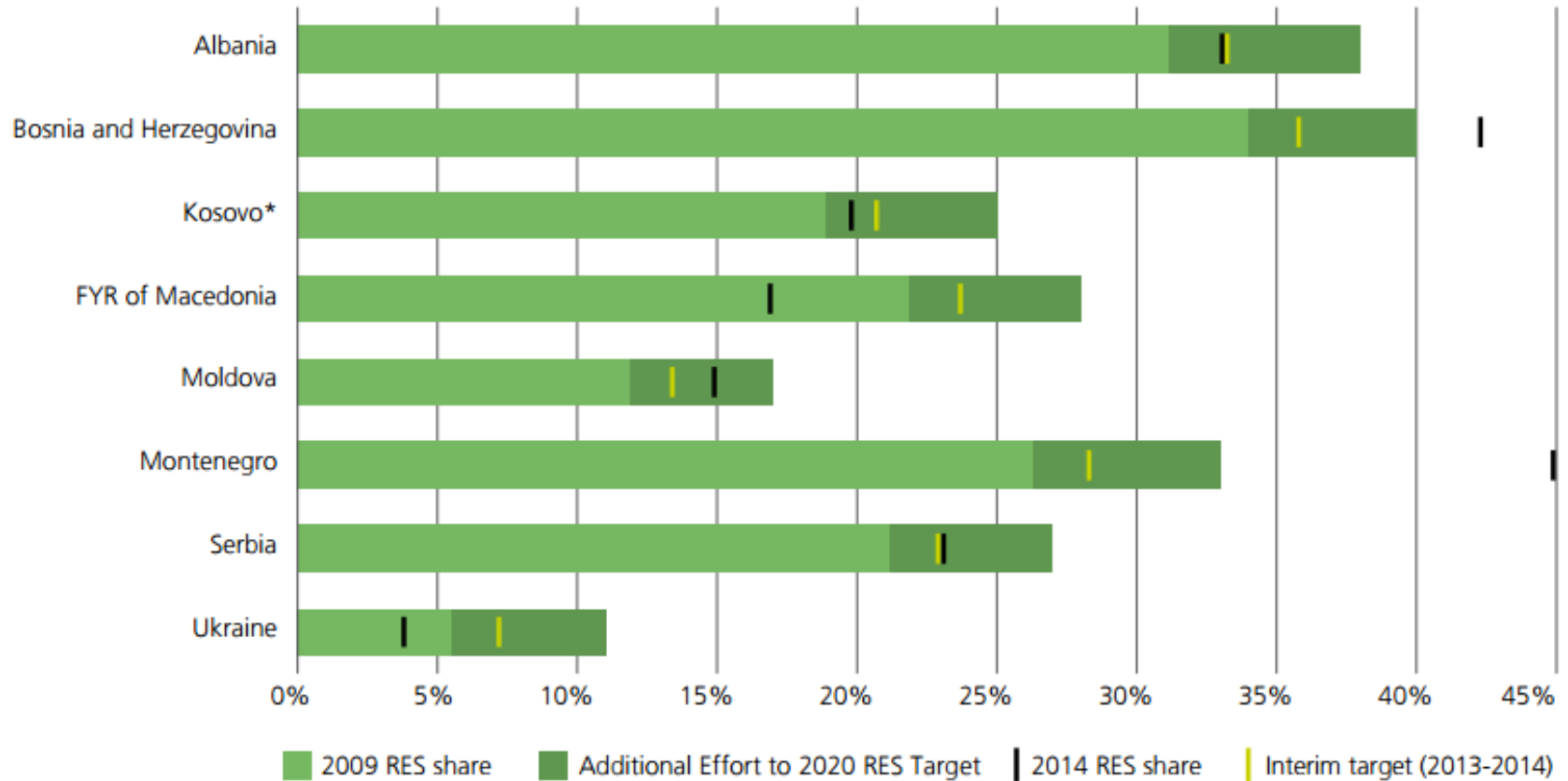
- €26bn invested in 2015
€150bn invested since 2010
- €72+bn 2015 turnover
- 330,000+ jobs



Wind deployment in the Energy Community

Ambitious RES targets

Energy Community Renewable Energy 2020 Targets



Source: EUROSTAT

1.1 GW

pipeline of
wind projects

Modest deployment due to:

- Administrative barriers
- Changing support schemes
- Grid connection quotas

Administrative barriers

Average lead times for onshore wind

Lowest  Highest
Average

Total lead time



Administrative lead time



Grid access lead time



Recommendations

Administrative procedures

- Set deadlines for the administrative process
- Set one-stop-shop
- Provide clear requirements for the EIA
- Ensure early citizen's involvement

Grid access procedures

- Develop grid infrastructure through international cooperation
- Provide transparency on the characteristics of the grid and the realistic timelines for connection

Tenders

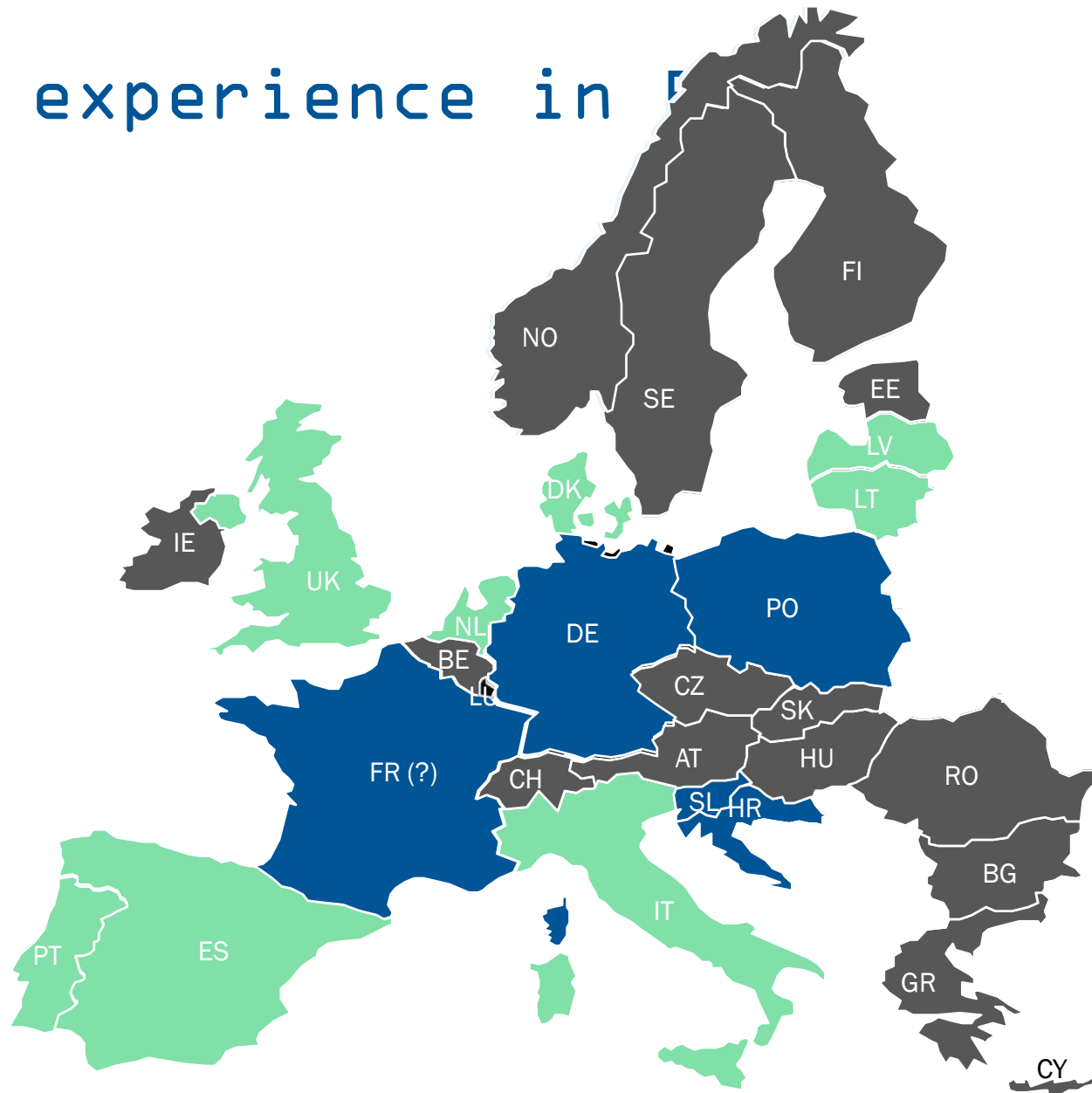
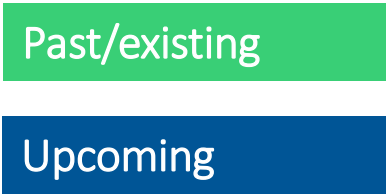
Background

2014-2020 State Aid Guidelines

- EC reference when assessing the compatibility of national support mechanisms with internal market rules
- EC considers tenders to be the best system to ensure cost-effective deployment of renewables
- Tenders will be a reference model for all RES starting in 2017



Tendering experience in Europe



Mixed results

Netherlands

Borssele 1&2

€72,7/MWh



Spain

500 MW auction

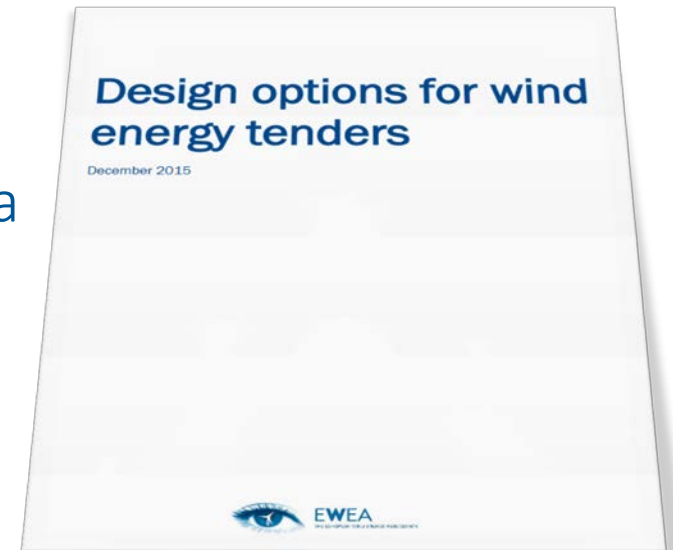
€0/MWh



Auction design is crucial for outcome!

Recommendations

- Organise regular auction rounds
- Ensure coordination between different administrative levels
- Prioritise technology-specific tenders
- Set up adequate prequalification criteria
- Calibrate penalties





NEXT YEAR, THE **WIND INDUSTRY**
WILL BE MEETING IN

AMSTERDAM

28 - 30 NOVEMBER 2017

Amsterdam RAI Exhibition and Convention Centre

Wind[•]
EUROPE

**CONFERENCE
& EXHIBITION
2017** 28-30 NOVEMBER
AMSTERDAM

windeurope.org/confex2017

Thank you!

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