



Council of the European Union
General Secretariat

**Interinstitutional files:
2023/0081 (COD)**

Brussels, 31 October 2023

WK 13887/2023 INIT

LIMITE

COMPET

WORKING PAPER

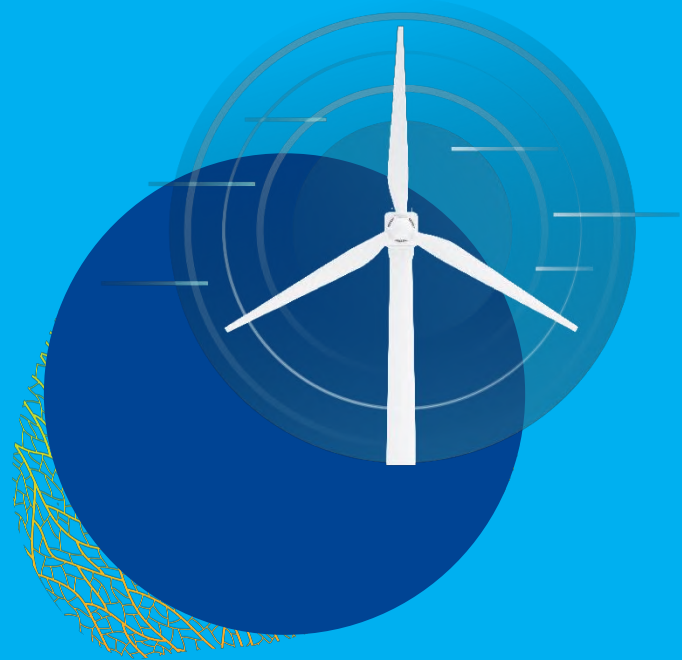
This is a paper intended for a specific community of recipients. Handling and further distribution are under the sole responsibility of community members.

MEETING DOCUMENT

From:	General Secretariat of the Council
To:	Working Party on Competitiveness and Growth (Industry)
Subject:	European Wind Power Package (agenda item 2.), Commission presentation Working Party on Competitiveness and Growth (Industry) meeting on 31 October 2023



PUBLIC



European Wind Power Action Plan

EWP 26 October 2023

Importance of wind energy in the EU

- EU target for renewables in 2030: 42.5% of the energy mix – almost double the current share (22%)
- According to projections, it will require in 2022-30:
 - share of wind-based electricity to increase: 16% → 34%
 - wind capacity to grow 2.5x (204 GW → 500 GW)
 - annual installations to increase 16GW → 37GW
- Wind sector offers between 240.000 to 300.000 jobs in the EU
- Wind equipment: 4 out of 10 biggest manufacturers are based in the EU. Another 4 in China.
- EU companies hold 85% of EU market share and 35% of global market share (decreasing from 42% in 2020)

Difficulties and their drivers

- Despite bright outlook, wind industry has faced difficulties. E.g. all largest EU wind turbine manufacturers reported operating losses in 2022. Impacts for other parts of wind supply chain in EU and on projects execution.
- Drivers:
 - Insufficient and uncertain demand for wind turbines – slow and complex permitting
 - Inflation and commodity prices
 - Design of national tenders for renewables
 - Growing pressure from international competitors
 - Availability of skilled workers

Key elements of our response so far

- Revised Renewable Energy Directive. Emergency regulation on permitting.
- Electricity Market Design
- Green Deal Industrial Plan. Net-Zero Industry Act. Critical Raw Materials Act.
- State Aid Framework including Temporary Crisis and Transition Framework
- Innovation Fund. InvestEU. Cohesion policy. Just Transition Fund. Strategic Technologies for Europe Platform.
- Technical Support Instrument

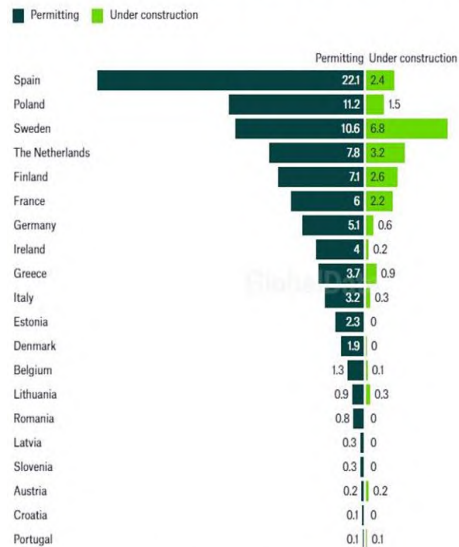
Six main pillars of action



1. Acceleration of deployment

The EU has four-times more wind capacity in permitting than under construction

Top 20 EU countries by wind pipeline capacity, broken down by development stage (GW)



Only wind projects with more than 5MW of capacity are represented in visual
Source: GlobalData

Accele-RES initiative – speedy and simple permitting:

- ✓ Speedy implementation of the Renewable Energy Directive
- ✓ Focus on digitalisation and trainings;
- ✓ Dedicated online tool to support MS;
- ✓ Guidance on renewables acceleration areas
- ✓ Update of recommendations on permitting
- ✓ Stronger cooperation via expert group on permitting and SMET



Better visibility of project pipeline

- ✓ MS pledges on wind deployment
- ✓ EU digital platform for auctions
- ✓ Stronger regional cooperation
- ✓ NECPs recommendations and 10-year plans



Grids Action Plan

2. Improved auction design

- Dialogue with Member States and stakeholders on auction design → Commission Recommendation and Guidance
 - Ensuring high value for money, full and timely project execution
 - Pre-qualification criteria (cybersecurity, sustainability, ability to deliver)
 - Strengthening non-price award criteria;
 - Exploring European code of business conduct;
 - Assessing consequences of negative bidding and price ceiling
- Commission will support co-legislators to strengthen NZIA
- Identify and assess cybersecurity risks relevant to wind energy installations and related infrastructure
- Increase the use of strategic procurement in the context of the Global Gateway



3. Access to finance

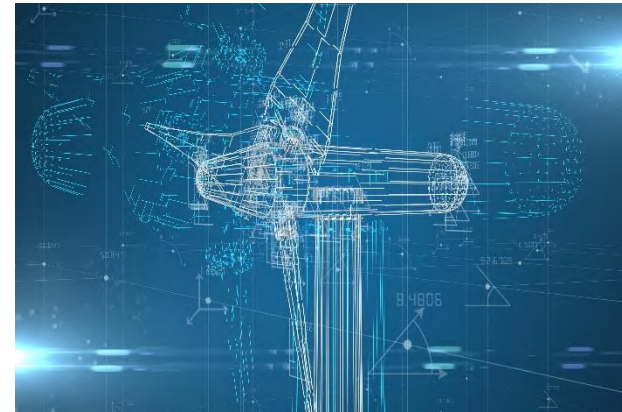
- Doubling the budget of the Innovation Fund clean tech manufacturing window (EUR 1.4 bln)
- European Investment Bank to provide de-risking tools and counter-guarantees for EU wind companies
- Member States to make full use of flexibility provided under State aid rules
- Strengthening dialogue with investors to foster the attractiveness of investments in the EU's wind sector

PUBLIC



4. Fair and competitive international environment

- Facilitate EU manufacturers' access to foreign markets via trade agreements, development of rulebook on subsidies, International Procurement Instrument
- Protect internal market against trade distortions and threat to security and public order. Foreign Subsidies Regulation. Foreign Direct Investments Screening Regulation.
- Promote adoption of standards in the wind sector



5. Skills

- The Large Scale Skills Partnerships for Renewable Energy and for Offshore Renewable Energy
 - ✓ Mapping the skills needed in the sector
- Net-Zero Academies

PUBLIC



6. Industry engagement and MS commitments

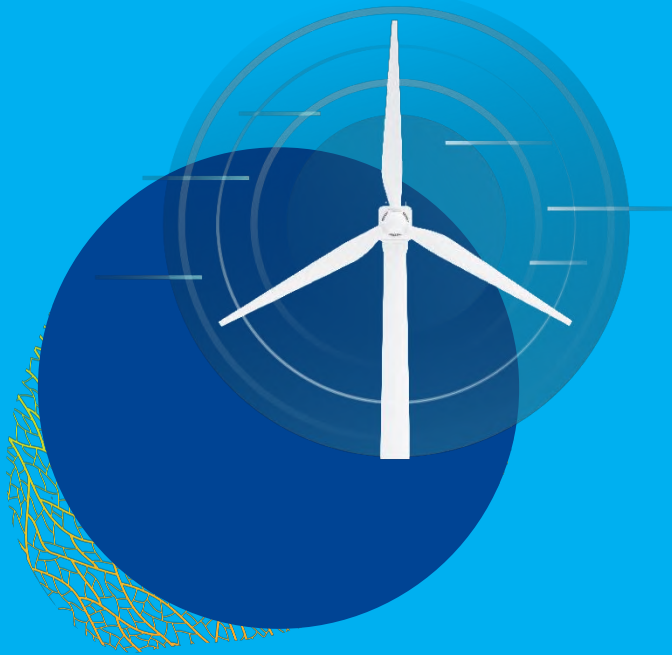
PUBLIC

- Wind Charter: Commission invites Member States and wind industry representatives to sign up to voluntary commitments by end 2023 in order to
 - ✓ align and swiftly implement the actions
 - ✓ demonstrating a common and coordinated effort to improve the enabling conditions for the European wind industry
- Industry to step up investments and ensure the expansion of its manufacturing capacity, in order to meet increased demand





PUBLIC



Thank you