



EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION



European Wind Industry perspective on Good Practices for Grid Access and Permitting procedures

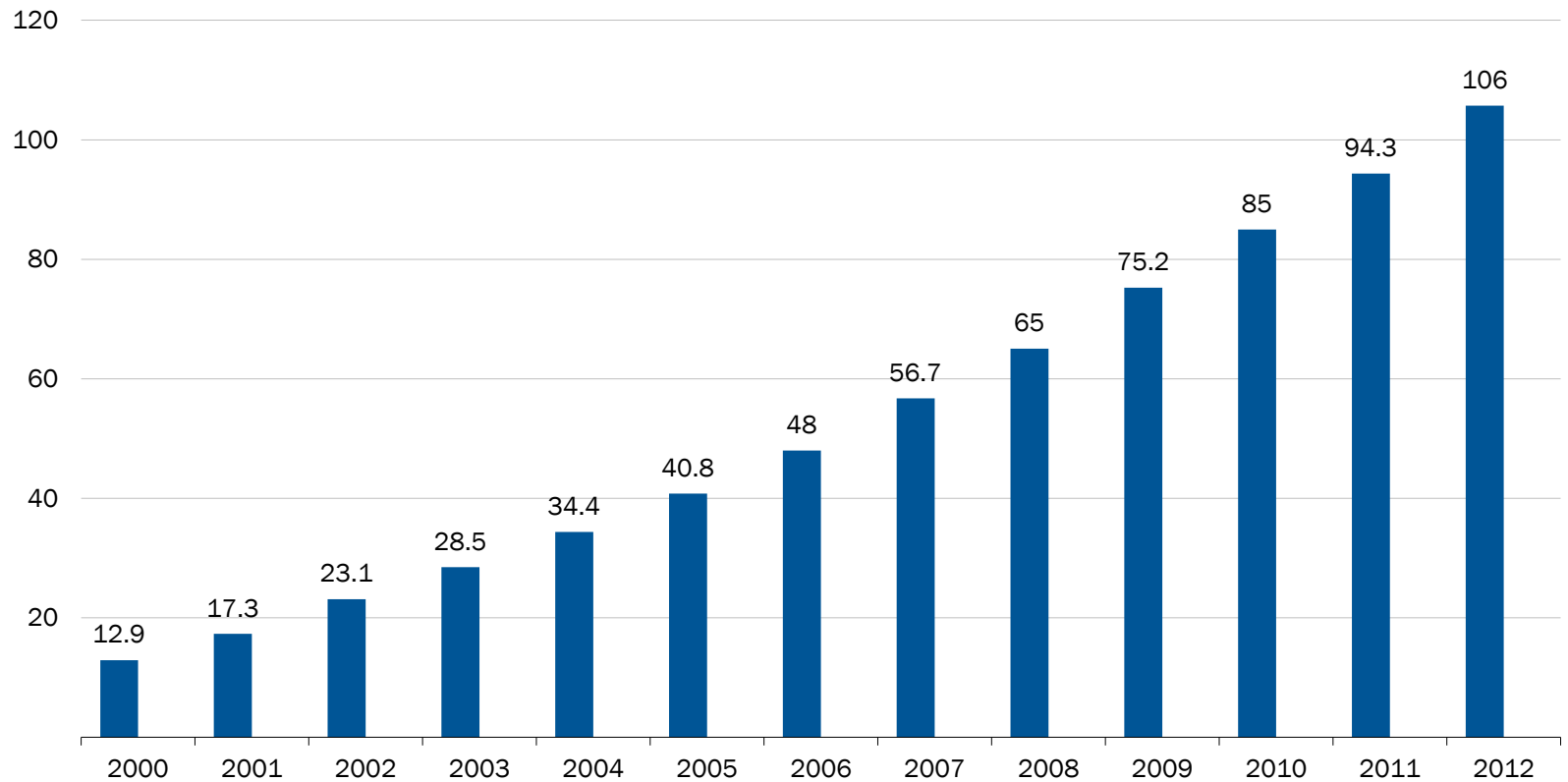
Pierre Tardieu – EWEA Regulatory Affairs Advisor

27 March 2013

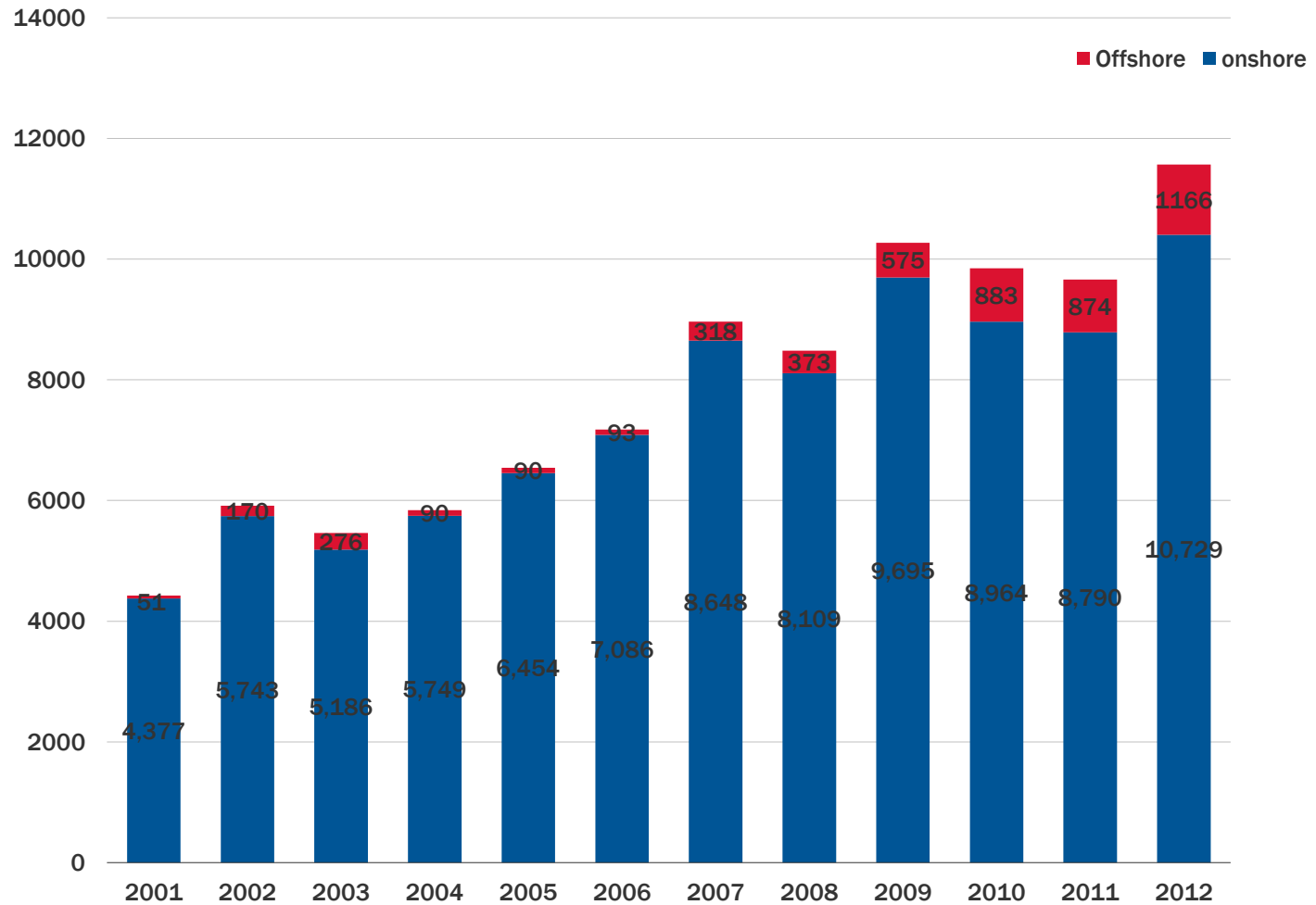
EWEA's leading members



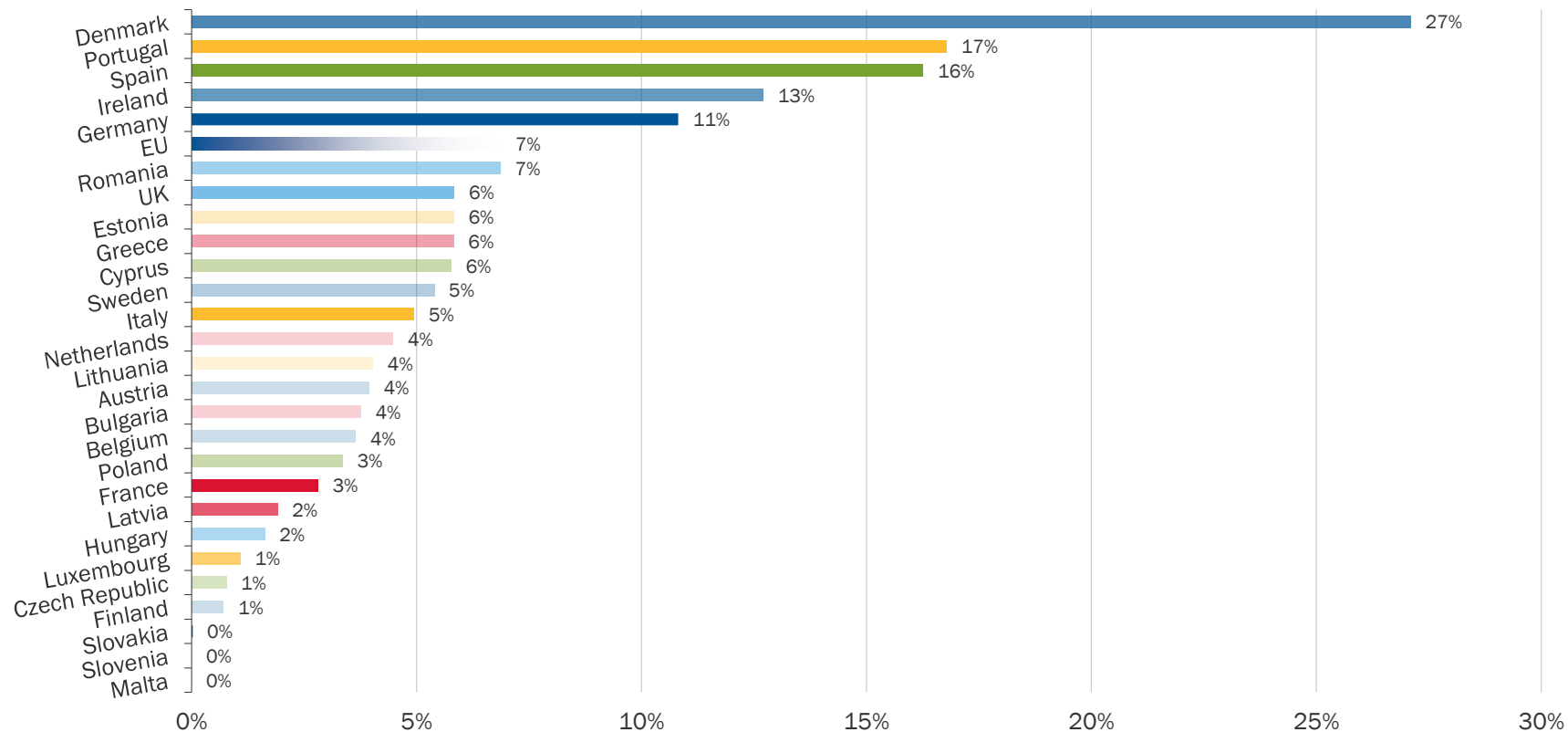
Cumulative wind power installations in the EU (GW)



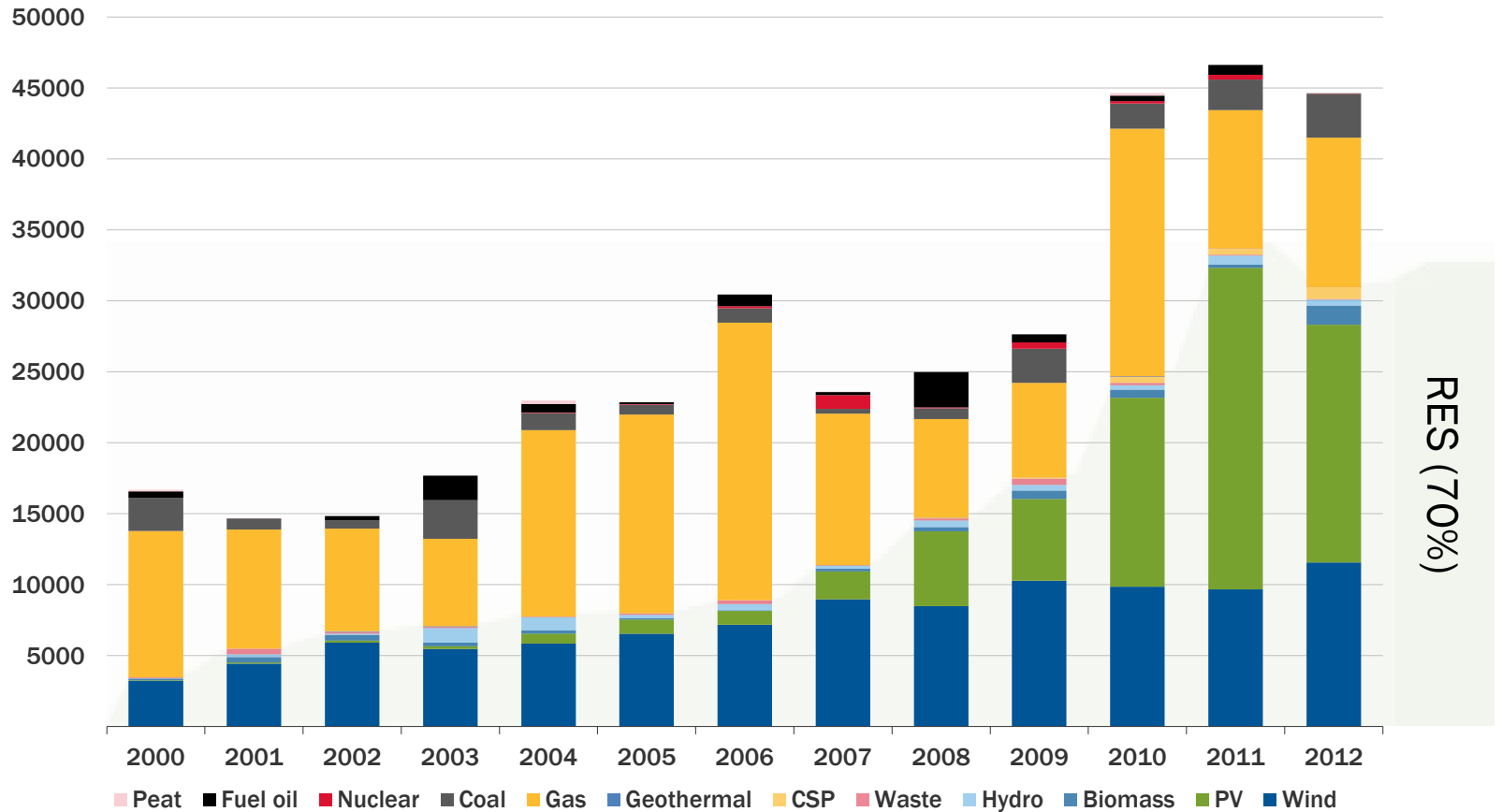
Annual onshore and offshore installations (MW)



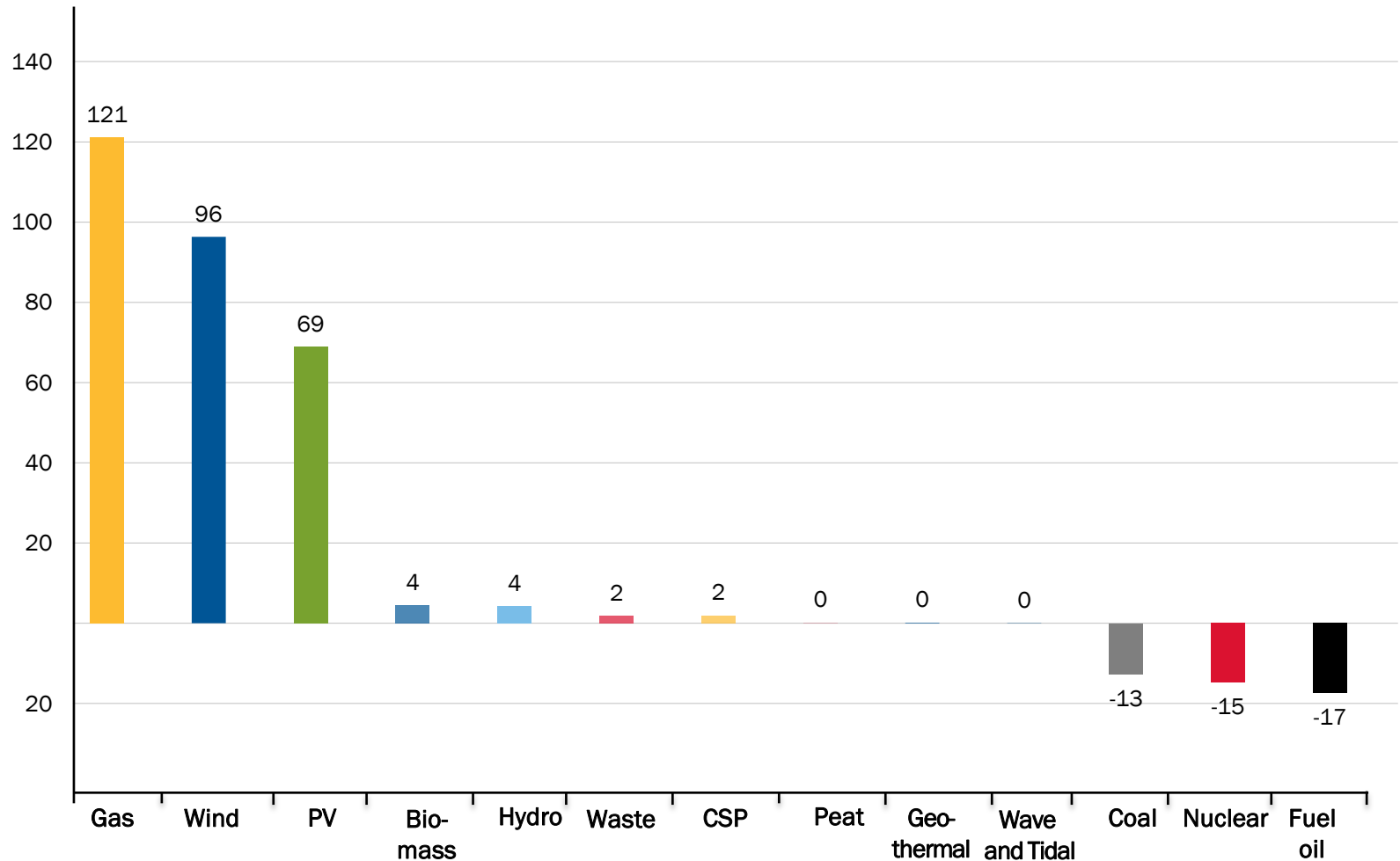
Wind power share of total electricity consumption in EU (7%) and in member states



Installed power generating capacity per year in MW and RES share (%)



Net electricity generating installations in EU 2000-2012 (GW)



Administrative and Grid access barriers

EU project Wind Barriers

Objectives:

1. Monitoring the implementation of the Renewable Energy Directive, particularly **Art. 13** (administrative procedures) and **Art. 16** (access to grid),
2. Compute statistical parameters and compare performance of countries or regions
3. Gathering comprehensive information on the administrative and grid access barriers
4. Quantify lead times for projects installed over **12 months** (both onshore and offshore) across EU 27,
5. Data gathered cover:
 - The timeframe for getting the necessary permits
 - the costs linked to the process,
 - the number of actions involved
 - success and failure rate of the applications

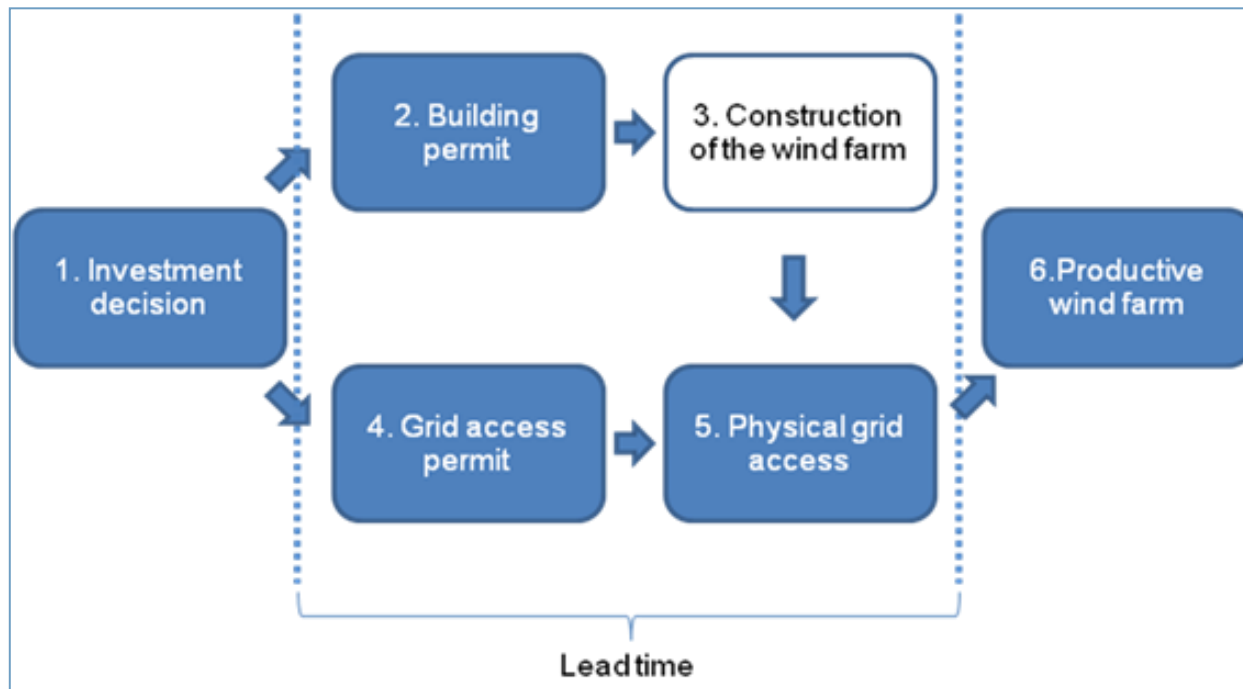
Wind barriers: expected results

- 22 MS analysed, at least 10 wind power plants per country less for offshore
 - More than 200 projects in total
- Quantifiable data on administrative and grid barriers
- Tested Methodology to be used by the European Commission and Member States to monitor the implementation of the RES Directive
- Tool to raise awareness of decisions-makers at local, regional, national and European level
- Recommendations made towards each Member States



Wind barriers: expected results

Under scrutiny: The process of getting the permit to build and connect a wind turbine



Wind barriers: main results

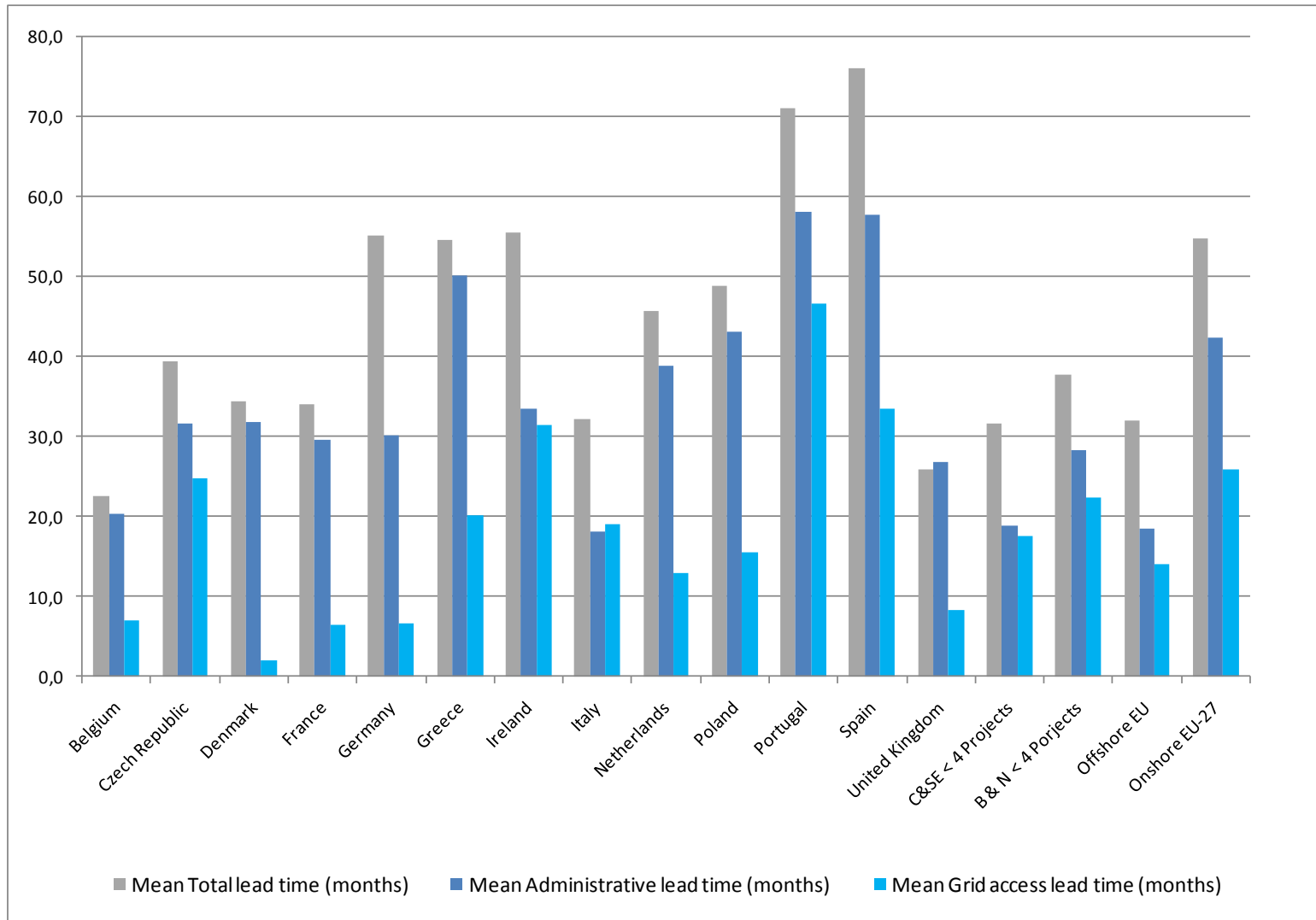


- Average total leadtime:
 - 54,8 months onshore
 - 32 months offshore – MSP, public acceptance
- Average administrative lead time: 42 months onshore and 18 months offshore, but:
 - Large disparity, from 2 to 154 months between projects and countries (GR, PT, ESP)
- Barriers:
 - Number of authorities to be contacted
 - 18 on average - direct and indirect - 30 in FR, FI and GR
 - Building permit:
 - 100 months in Spain for example
 - Lack of sufficient trained civil servants
 - Offshore: EIA and other users of the sea

Wind barriers: main results

- Average grid access lead time: 25,8 months onshore and 14 months offshore
 - Much lower than administrative lead-time
- Barriers
 - Lack of grid capacity/information
 - Lack of planning of future extension and reinforcement
 - Problems with land ownership: evacuation line
 - EIA
- Main issue not so much definitive refusals but lack of binding deadlines, delays and lack of transparency

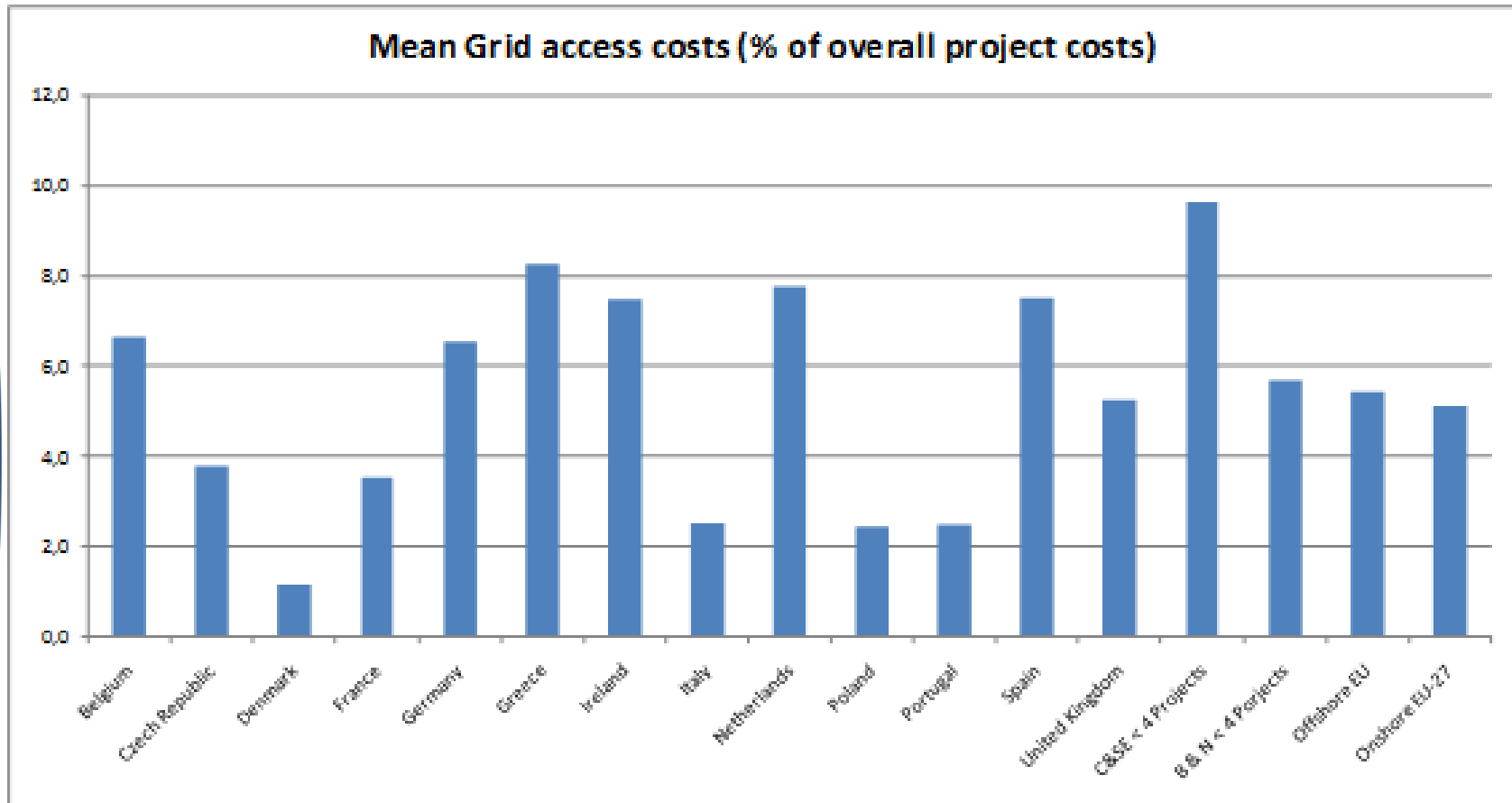
Overview on main results



Main results on grid connection costs



- On average its represents 5,13% of total project costs onshore and 5,43% offshore, but large variety between countries and also grid tariff structures



Source: AEE and Fraunhofer ISI 2010, for WindBarriers

Recommendations: administrative process



EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION

- Set deadlines for the administrative process.
- One-stop-shop
 - Train and allocate enough civil servants to handle applications
- Clear Requirements on Environmental Impact Assessments
 - fixed deadlines, number of EIAs depending on size and location of park
 - 40% of projects slowed down by law suits during EIA
 - Encourage authorities to make relevant data available
- Develop spatial planning by defining the most appropriate locations and wind development areas
- **Reduce the average total lead time in the EU to 24 months.**

Recommendations: grid access

- Develop grid infrastructure
 - Standardised grid codes across EU
 - International cooperation on reinforcing on and offshore transmission systems
 - Make occupying land for interconnection infrastructure easier (with appropriate compensations)
- Clear information about grid connection costs
- System operator to cover or contribute to grid connection cost
- Transparency:
 - Publicise info on characteristics of grid
 - Realistic timeline for connection
- Reduce the average grid connection lead time in the EU to six months.



EWEA
THE EUROPEAN WIND ENERGY ASSOCIATION

Thank you

www.ewea.org

EWEA
80 RUE D'ARLON
B-1040 BRUSSELS

T: +32 2 213 1811
F: +32 2 213 1890
E: ewea@ewea.org