

The future for the HYDROPOWER EUROPE Forum as a common and permanent voice in Europe

The Important Role of Hydropower in the Energy Transition

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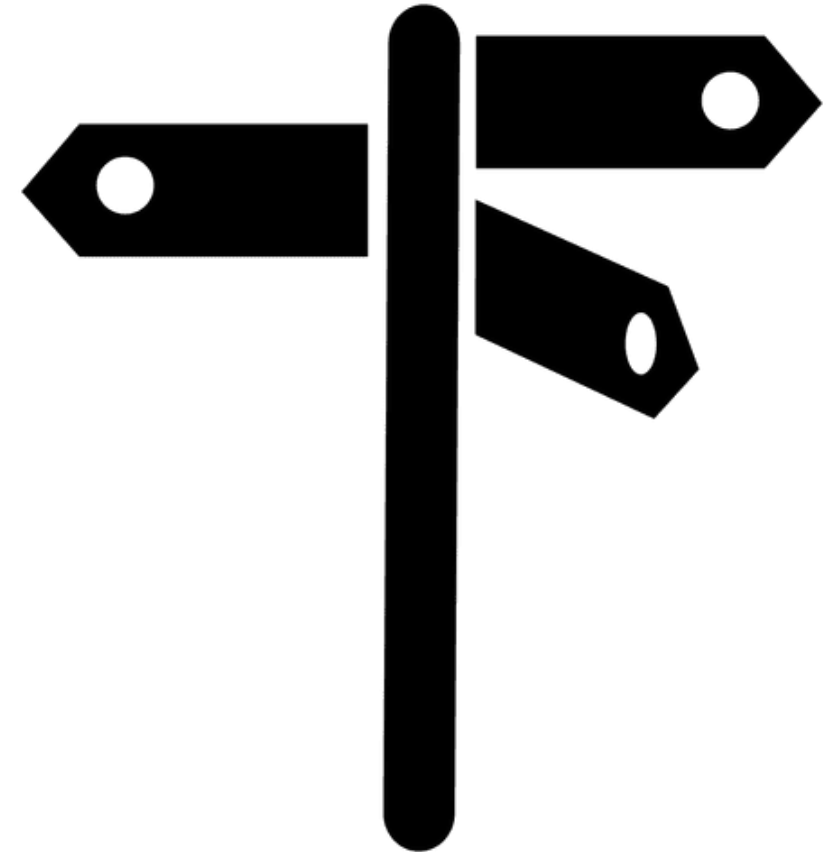


Ruppoldingen run-of-river powerplant, Switzerland

Where are we heading?

The HYDROPOWER EUROPE project was funded by the European Commission to – amongst other things – establish a Forum which provided a platform for all members of the hydropower community across Europe to express their views.

The HYDROPOWER EUROPE Forum is currently giving a voice to **over 600 members** drawn from a wide array of sectors and countries,



Over the past 3 years we have:

- Created the framework to support the Forum
- Encouraged participation in a wide programme of consultation events
- As we've just seen, identified and prioritised issues for research and industry action – leading to publication of the RIA and SIR
- Hosted events to discuss and help raise awareness on hydropower's role in the clean energy transition, and the need for hydropower to address environmental and sustainability goals



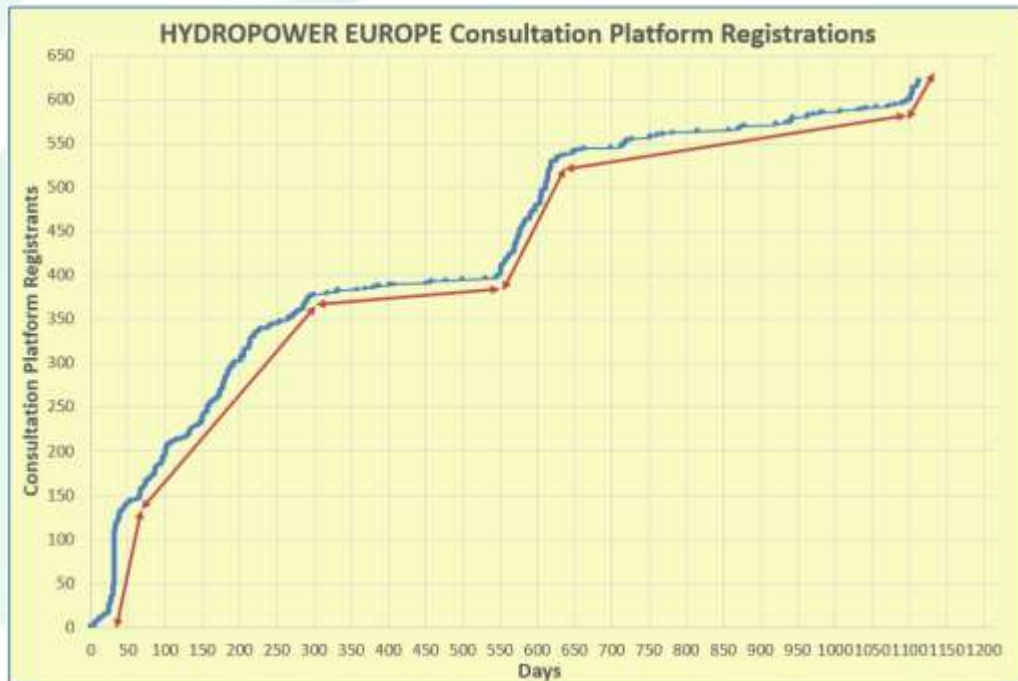
HYDROPOWER EUROPE & EERA JP HYDRO joint event
 Dates: 02/09/2021 09:30 CET - 02/09/2021 11:00 CET
 Description: Sustainability and acceptability of hydropower as part of the clean energy transition
 A fundamental challenge of the energy transition is the cost-effective integration of variable renewables and assurance of the security of supply. This session will show how pumped and storage hydropower can address environmental and social issues more sustainably.
 The main goal of the Sustainable Energy Day session is to address hydro-generated environmental and social impacts and to underline hydropower's role in the sustainable energy transition. To do so, pumped-storage hydropower shall play an essential role in balancing variable renewable energy sources.
 To demonstrate that hydro has a place within the SET-Plan, the session shall involve policy makers, the energy industry, and civil society in discussions about successful case studies provided by hydropower as well as with a wider audience working on the topic.
 The session will start with a brief introduction followed by keynote speakers. The panel discussion will be moderated by experts in the field. Interactive elements include voting options to foster the interactivity of the event in general and the panel discussion. The audience will be encouraged to give input through interactive polls, commenting, and asking questions.



The HYDROPOWER EUROPE Forum

During the 3 yr programme of HYDROPOWER EUROPE the Forum has grown to over 600 registrants, with ~70% from the EU27.

Surges in registrations reflect different consultation and dissemination events



No	EU Country	CP Reg
1	Austria	30
2	Belgium	30
3	Bulgaria	6
4	Croatia	2
5	Cyprus	0
6	Czech Republic	4
7	Denmark	0
8	Estonia	0
9	Finland	6
10	France	109
11	Germany	55
12	Greece	10
13	Hungary	2
14	Ireland	6
15	Italy	46
16	Latvia	0
17	Lithuania	2
18	Luxembourg	1
19	Malta	0
20	Netherlands	19
21	Poland	3
22	Portugal	24
23	Romania	6
24	Slovakia	1
25	Slovenia	7
26	Spain	21
27	Sweden	50
Total		440

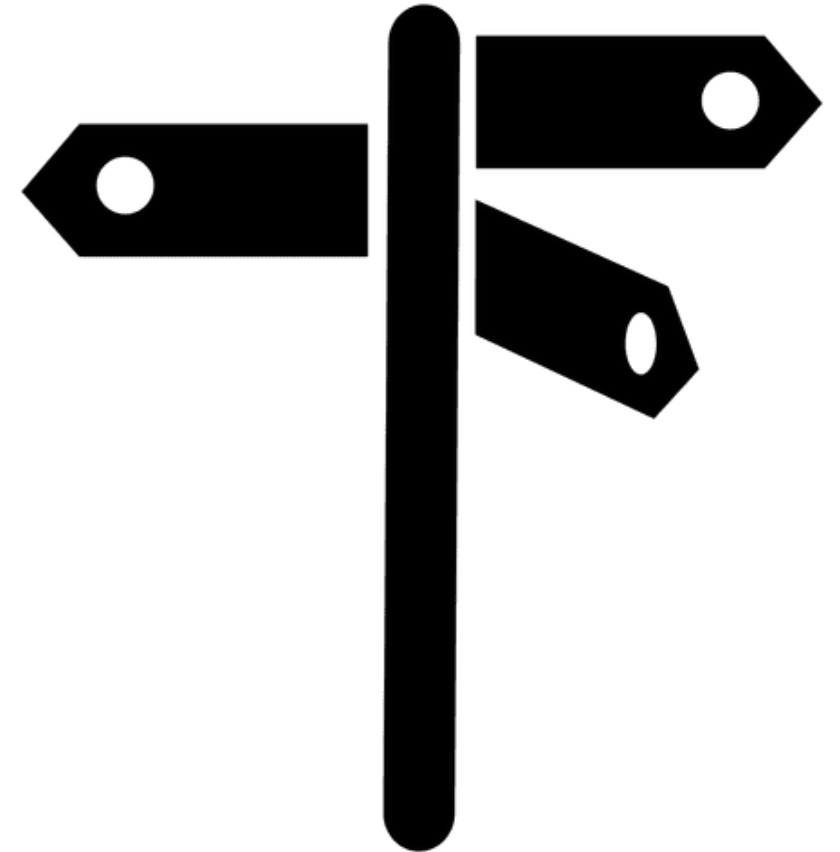
No	Non EU	CP Reg
1	Albania	6
2	Afghanistan	1
3	Australia	1
4	Bhutan	1
5	Bolivia	1
6	Bosnia & Herzegovina	4
7	Brazil	1
8	Canada	2
9	China	1
10	Colombia	1
11	Georgia	1
12	Iceland	1
13	Indonesia	1
14	Japan	1
15	Kosovo	1
16	Laos	2
17	India	9
18	Macedonia	11
19	Moldova	2
20	Montenegro	1
21	Nepal	6
22	New Zealand	1
23	Norway	18
24	Pakistan	6
25	Peru	1
26	Russia	2
27	Serbia	2
28	Sri Lanka	1
29	Swaziland	1
30	Switzerland	51
31	Turkey	13
32	Uganda	2
33	UK	18
34	Ukraine	1
35	USA	8
36	Vietnam	1
Total		181

Future Direction

So, where from here?

Two roles / services have been identified:

- (1) Providing a platform for a unified voice in Europe
- (2) Facilitating the implementation of priority research and strategic actions through promoting and supporting industry collaboration

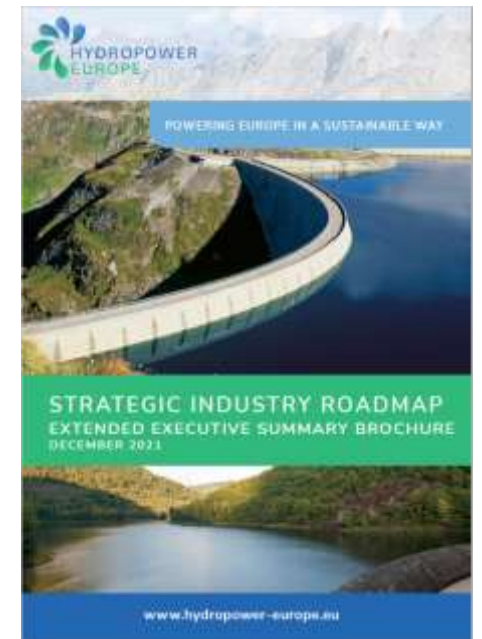


The Focus

In both of these actions we need to:

- Continue to raise awareness of hydropower and the essential role it can play in the clean energy transition
- Support and facilitate implementation of the Research & Innovation Agenda priorities
- Support industry in addressing the issues highlighted by the Strategic Industry Roadmap

With the HYDROPOWER EUROPE Forum established – and growing with each consultation event – we need to focus that base of expertise and representation into helping to deliver these goals – but in a sustainable way.

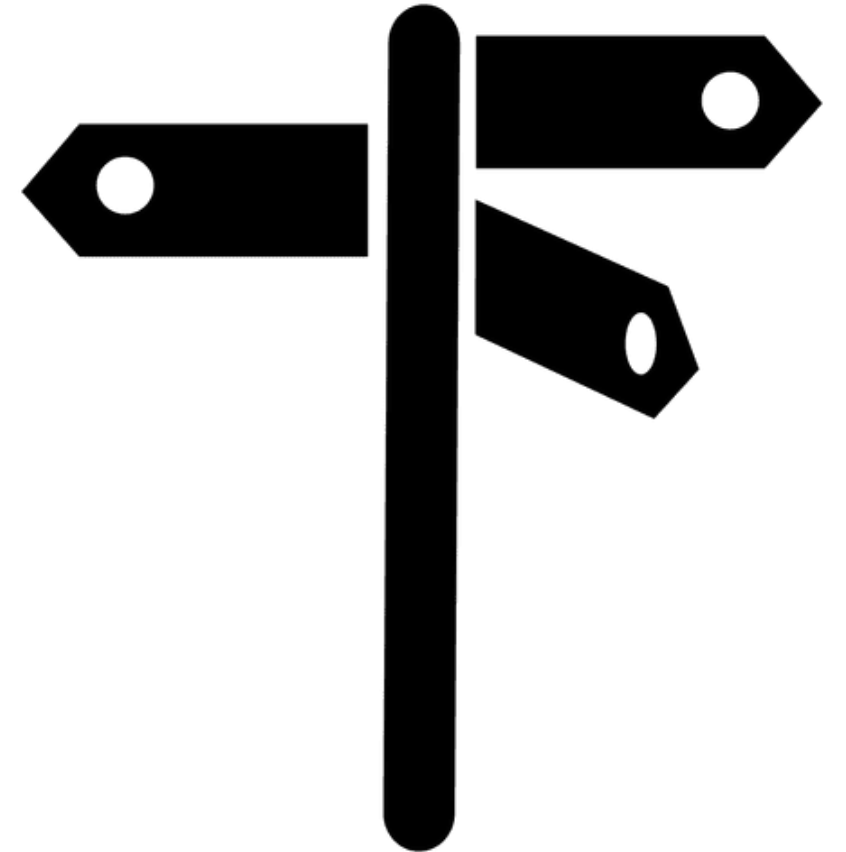


Future Direction

Industry has expressed interest and support for both of these actions over the past few years

Now we must refine, finalise and implement a sustainable business model which:

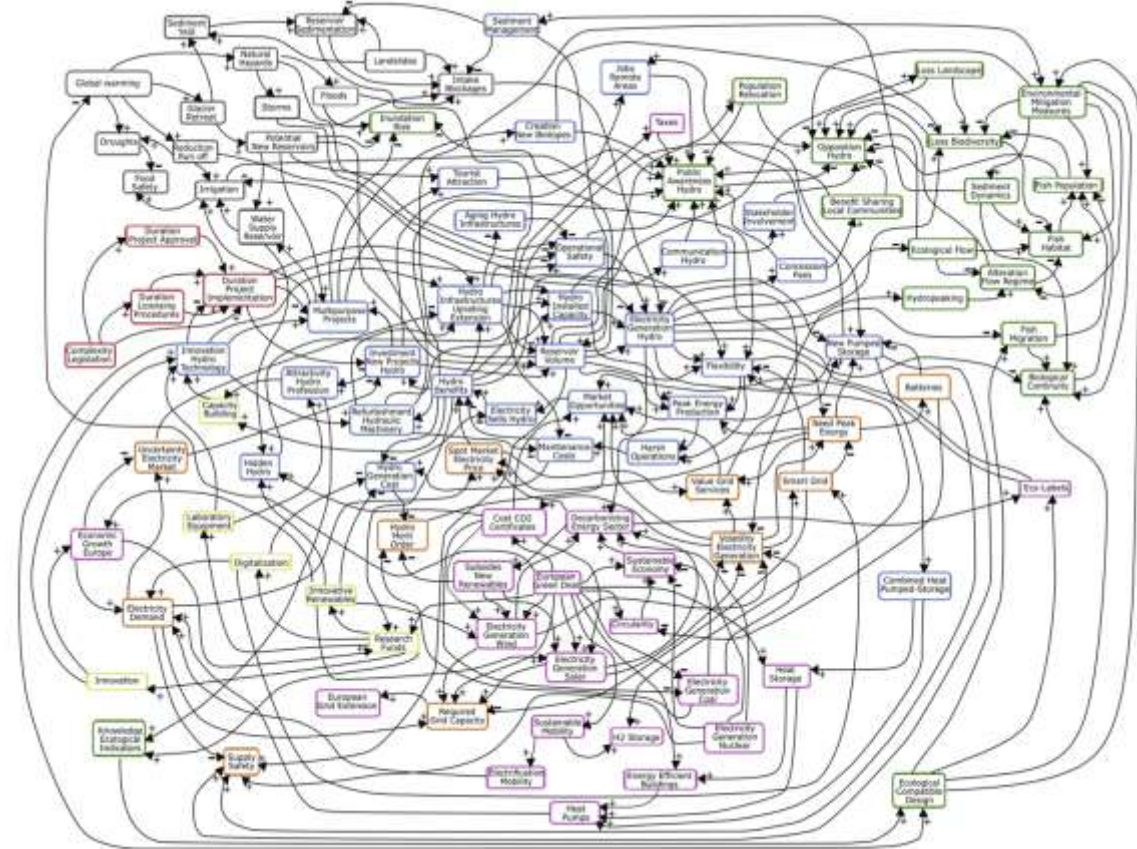
1. Meets specific industry needs
2. Does not duplicate the role of existing associations
3. Supports the clean energy transition
4. Facilitates achieving RIA and SIR objectives



The Approach

So, the approach being taken is:

- To develop the detailed approaches / options for unified representation and R&I facilitation in conjunction with further industry consultation
- Balancing potential benefits against potential costs / sustainability model
- Implement...



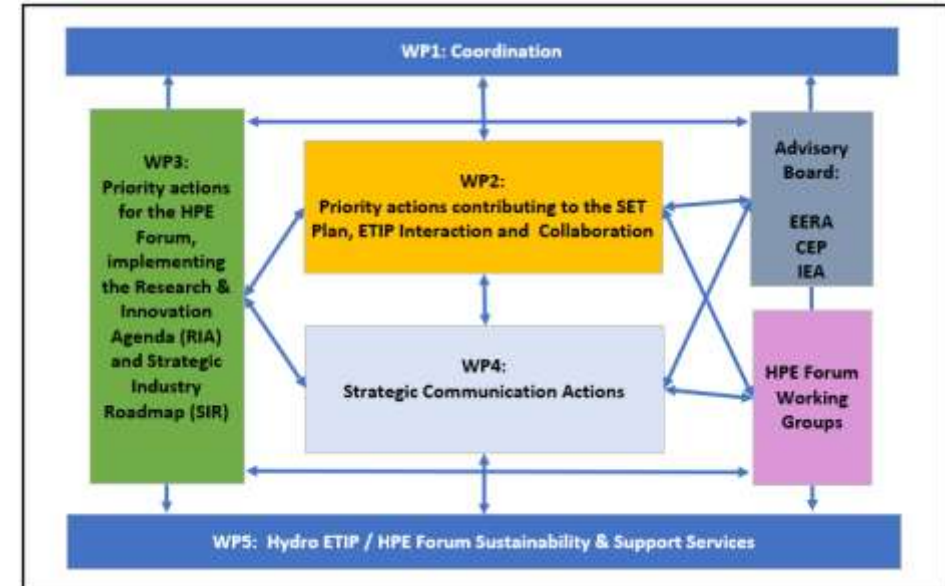
ETIP HYDROPOWER

ETIP HYDROPOWER:

An opportunity arose within the recent Horizon Europe programme to seek support for an ETIP HYDROPOWER.

This would support greater integration of hydropower within the European Strategic Energy Technology (SET) Plan whilst also supporting the creation of self sustaining association. → →

News on this approach should come early Summer 22



Considering in more detail:

(2) Facilitating implementation of priority research and strategic actions through promoting and supporting industry collaboration

- This is of immediate interest and value to many hydropower industry organisations
 - Hence is a mechanism where organisations could pay to participate, with these costs outweighed by the value gained through the research collaboration process
- This is not intended to replace or duplicate existing funded research programmes
 - rather, to facilitate industry collaboration on priority issues not yet being funded , or funded enough, or addressed quickly enough, elsewhere
 - hence it should complement and extend R&I actions not replace or duplicate

Facilitating Industry R&I Collaboration

So - the goal here is to provide a service to the hydropower industry...

- Supporting easier more cost effective access to priority R&D through, for example:

- More detailed tracking of R&I actions, priorities etc. → maintained signposting...

- Participation in small projects programme → collaboration on directly commissioned priority small projects

- Facilitating collaborative R&I actions between industry partners:
 - Highlighting Individual Organisation Priorities
 - Potential for Individual Funding Contributions
 - Building sufficient momentum and commitment for action
 - Implementing
 - Repository for R&I information / actions

- Flagging National, European & International research funding opportunities – encouraging collaboration

Signposting...
Continuous mapping & tracking of EU, National and Industry research initiatives and funding opportunities

Small Projects Programme

Co-funded Projects Programme

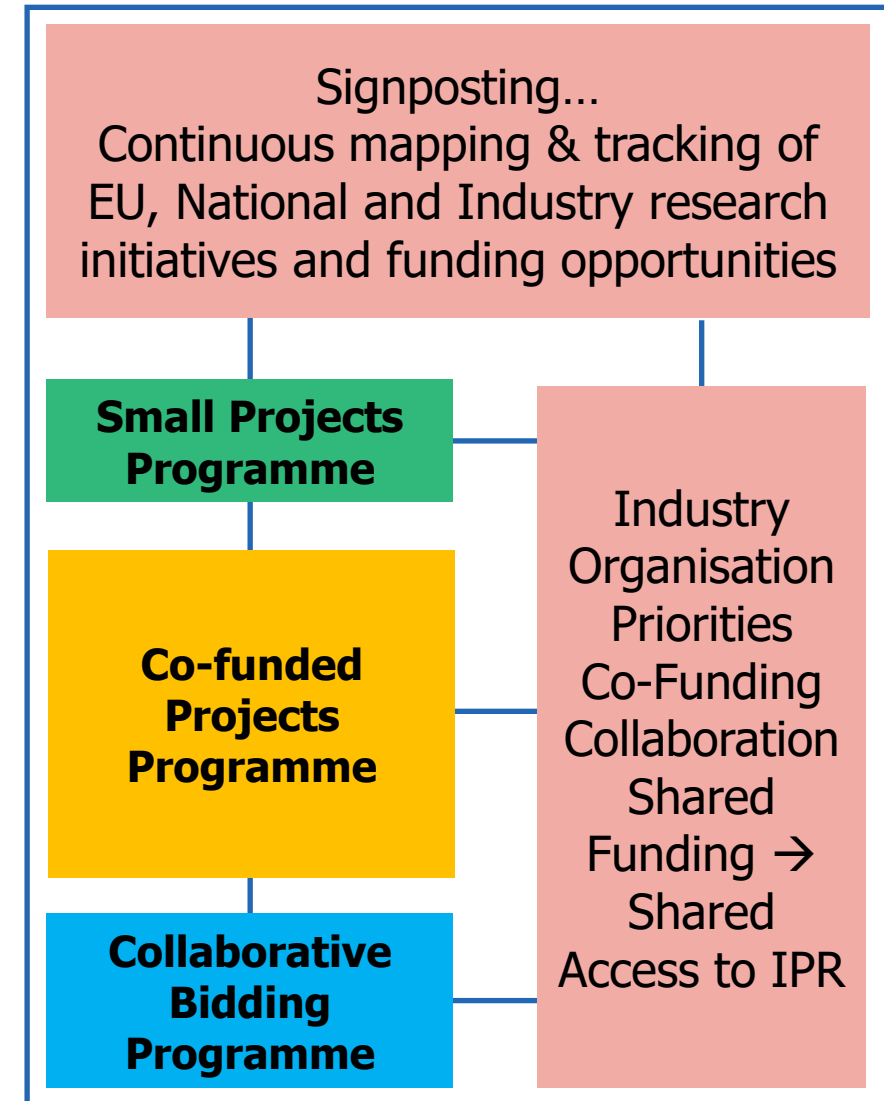
Collaborative Bidding Programme

Industry Organisation Priorities
Co-Funding Collaboration Shared Funding → Shared Access to IPR

Facilitating Industry R&I Collaboration

Avoiding:

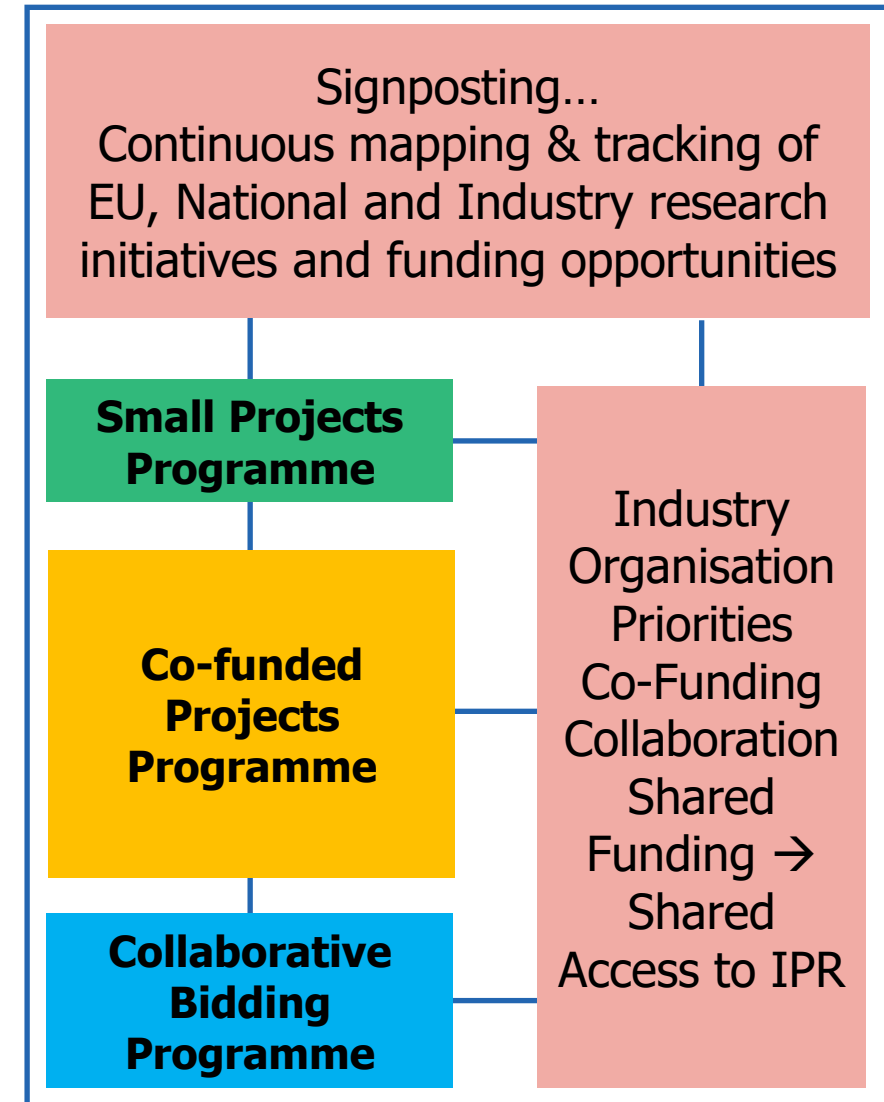
- Duplication of existing association / network roles and services
- 'Cliff edge' implementation
 - (through phased implementation during ETIP programme)



Timeframe and approach...

Our proposed approach is to:

- Introduce these ideas for industry feedback Autumn 2021 (now!)
- Seek EC funding for a hydropower ETIP
 - The opportunity exists now – if successful, funding from ~mid 2022 for, say, 3 yrs
 - under which both ETIP activities and this business model would be implemented
 - Advantage of staged implementation – for example, perhaps:
 - Structuring and setup in Yr 1 (2022-23)
 - Industry participation at 0% cost Yr 2 (2023-24)
 - Industry participation at 50% cost Yr 3 (2024-25)
 - ETIP concludes; HYDROPOWER Forum continues under full business model (2025 →)



In conclusion:

1. We propose a self sustainable future for the HYDROPOWER EUROPE Forum
2. Focus on (i) unified voice in Europe and (ii) facilitating industry priority R&I
 - Business model to be refined and confirmed via further industry consultation 22/23
3. Greater visibility and action within the European SET Plan
4. Transition via ETIP HYDROPOWER
 - Funding position should be clear by early Summer 22

