Outline of presentation

• Introducing EWEA

• Romania’s Wind Market 2008

• The EU Renewable Energy Directive
  – National renewable energy targets for 2020
  – National Action Plans
  – Cooperation & flexibility mechanisms
  – Administrative & grid issues
WHAT IS THE EUROPEAN WIND ENERGY ASSOCIATION?

EWEA is the voice of the wind industry, actively promoting the utilisation of wind power in Europe and worldwide.

Resources are focussed on lobbying, communication and policy activities, and responding to enquiries from our member organisations.
MORE THAN 600 MEMBERS FROM OVER 60 COUNTRIES

- Manufacturers covering 90% of the world wind power market
- Component suppliers
- Research institutes
- National wind and renewables associations
- Developers
- Electricity providers
- Installation & logistics
- Operation & maintenance
- Finance and insurance companies
- Consultants
Member companies
European Offshore Wind Conference & Exhibition
14 – 16 September 2009, Stockholm, Sweden
www.eow2009.info
Wind power in Europe 2008

Wind power installed in Europe by end of 2008 (cumulative)

European Union: 64,935 MW
Candidate Countries: 452 MW
EFTA: 442 MW
Total Europe: 65,933 MW
## Wind Power’s Share of Electricity Demand

![Bar chart showing the percentage of electricity demand covered by wind power in different European countries as of 2007. Denmark leads with 21.3%, followed by Spain at 11.8%.](image)

<table>
<thead>
<tr>
<th>Country</th>
<th>Wind Power's Share of Electricity Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>21.3%</td>
</tr>
<tr>
<td>Spain</td>
<td>11.8%</td>
</tr>
<tr>
<td>Portugal</td>
<td>9.3%</td>
</tr>
<tr>
<td>Ireland</td>
<td>8.4%</td>
</tr>
<tr>
<td>Germany</td>
<td>7.0%</td>
</tr>
<tr>
<td>EU-27</td>
<td>3.8%</td>
</tr>
<tr>
<td>Greece</td>
<td>3.7%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.4%</td>
</tr>
<tr>
<td>Austria</td>
<td>3.3%</td>
</tr>
<tr>
<td>UK</td>
<td>1.8%</td>
</tr>
<tr>
<td>Estonia</td>
<td>1.8%</td>
</tr>
<tr>
<td>Italy</td>
<td>1.7%</td>
</tr>
<tr>
<td>Sweden</td>
<td>1.3%</td>
</tr>
<tr>
<td>France</td>
<td>1.2%</td>
</tr>
<tr>
<td>Lithuania</td>
<td>1.1%</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>1.1%</td>
</tr>
<tr>
<td>Latvia</td>
<td>0.9%</td>
</tr>
<tr>
<td>Belgium</td>
<td>0.7%</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>0.5%</td>
</tr>
<tr>
<td>Poland</td>
<td>0.4%</td>
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<tr>
<td>Czech Republic</td>
<td>0.4%</td>
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<tr>
<td>Hungary</td>
<td>0.4%</td>
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<tr>
<td>Finland</td>
<td>0.3%</td>
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<tr>
<td>Slovakia</td>
<td>0.0%</td>
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<tr>
<td>Romania</td>
<td>0.0%</td>
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<tr>
<td>Slovenia</td>
<td>0.0%</td>
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<tr>
<td>Malta</td>
<td>0.0%</td>
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<tr>
<td>Cyprus</td>
<td>0.0%</td>
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</tbody>
</table>

Source: EWEA 2007
The EU Renewable Energy Directive

- The EU Renewable Energy Directive 2009 – 2020:
  - Binding Romanian renewable energy target of 24%
  - National Action Plan to be submitted June 2010
  - Administrative & planning issues
  - Grid issues
  - Cooperation & flexibility mechanisms
Differentiated National Targets

- 2005 RES share
- Flat increase of 5.5%
- Additional effort based on GDP
- Adjustment for early start bonus

Countries: BE, BG, CZ, DK, DE, EE, EL, ES, FR, IT, CY, LV, LT, LU, HU, MT, NL, AT, PL, PT, RO, SI, SK, FI, SE, UK
Indicative trajectory: Romania & EU

- **Romania:**
  - 2005: 8.5
  - 2011-2012: 10.8
  - 2013-2014: 11.95
  - 2015-2016: 13.675
  - 2017-2018: 15.975
  - 2020: 20

- **EU average:**
  - 2005: 17.8
  - 2011-2012: 19.0
  - 2013-2014: 19.7
  - 2015-2016: 20.6
  - 2020: 24

The graph shows the indicative trajectory of wind energy adoption in Romania compared to the EU average. The data indicates a steady increase with Romania aligning closer to the EU average by 2020.
### National Action Plans - timeframe

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>June ‘09</td>
<td>Binding format for the National Action Plans is made available by Commission</td>
</tr>
<tr>
<td>Summer ‘09</td>
<td>Directive enters into force 20 days after publication in the Official Journal. New installations and increased capacity from refurbished installations may take advantage of joint projects aspects</td>
</tr>
<tr>
<td>December ‘09</td>
<td>Member States send a forecast document to Commission indicating whether they will have a surplus or import needs to meet interim trajectory</td>
</tr>
<tr>
<td>June ‘10</td>
<td>Member States send National Action Plan to Commission outlining “appropriate measures”</td>
</tr>
<tr>
<td>Summer/Autumn ‘10</td>
<td>Member States transpose the Directive’s provisions into national law &amp; communicate this to the Commission</td>
</tr>
<tr>
<td>December ‘10</td>
<td>Commission evaluates the National Action Plans.</td>
</tr>
<tr>
<td>December ‘11</td>
<td>Member States report on progress made in reaching established national objectives (every 2 years)</td>
</tr>
</tbody>
</table>
National Action Plans

The binding template to be published by the Commission will include:

- Gross final energy consumption in electricity, transport and heating and cooling for 2020;
- National sectoral 2020 targets and estimated shares of RES in each sector in 2020;
- The estimated trajectory to 2020;
- The ways these sectoral targets will be achieved, including:
  - an overview of all policies and measures concerning the promotion of RES;
  - the specific steps that will be taken to address administrative procedures and grid access, including the need to extend and/or to reinforce existing infrastructure to facilitate the integration of the quantities of renewables needed;
  - the total contribution expected of each renewable energy technology to meet the national overall target.
Administrative Procedures

- Romania will have to make sure that the authorisation process for renewable energy projects is proportionate, necessary and transparent and at the appropriate administrative level;
- the respective responsibilities of national, regional and local administrative bodies for authorisation, certification and licensing procedures including spatial planning are clearly coordinated and defined;
- Transparent timetables for determining planning applications;
- comprehensive information on the processing of an authorisation and assistance available to applicants must be made available at the appropriate level;
- administrative charges paid by planners are transparent and cost-related.
Grid issues

In order to help develop renewable electricity Romania is required to:

• Take the appropriate steps to develop:
  – transmission and distribution grid infrastructure,
  – intelligent networks,
  – storage facilities
  – the electricity system
• speed up authorisation procedures for grid infrastructure;
• ensure that TSOs & DSOs guarantee the transmission and distribution of renewable electricity; and
• provide for either priority access to the grid system (connected generators of renewable electricity are sure that they will be able to sell and transmit their electricity) - or guaranteed access (ensuring that all electricity from renewable sources sold and supported gets access to the grid) - and priority during dispatch.
Flexibility & cooperation mechanisms – between EU countries

Member States may agree a statistical transfer of a specified amount of RES between themselves, if:

- such a statistical transfer does not affect the achievement of the national target by the Member State; and
- the European Commission is notified by all Member States involved in the transfer.

Two or more Member States may cooperate on a joint project and this cooperation may involve private operators. However:

- only projects that become operational, or increased capacity of an installation that was refurbished, after the Directive EIF;
- The Member State involved must notify the Commission of the proportion or amount of energy produced by any joint project in its territory which is to be regarded as counting towards the national overall target of another Member State.

Two or more Member States may decide to join or partly coordinate their national support schemes. RES is allocated to national target by a statistical transfer or by a distribution rule agreed by the participating Member States.

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An opportunity for Romania

Achieving the 2020 RES target of 24% through the National renewable Energy Action Plan should be seen as an opportunity for Romania:

– Clean power production
– Energy security
– Reducing GHG emissions
– Job creation
– Opportunity for providing surplus RE for export
Thank you very much for your attention