



IWEA Annual Spring Conference 2019

12th & 13th March 2019

Clayton Hotel,
Burlington Road,
Dublin

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SENVION
We make wind perform.



Status & Outlook for the Wind Industry

DAVID CONNOLLY, CEO, IWEA

WIND ENERGY IN IRELAND ANNUAL REPORT 2018 - OUR BEST YEAR YET



29%

In 2018 wind energy met a record 29 per cent of our electricity demand – the second highest in Europe.



330 MW

of new wind capacity installed in the Republic of Ireland in 2018.

19

New wind farms built in 2018.

Now

3,566 MW

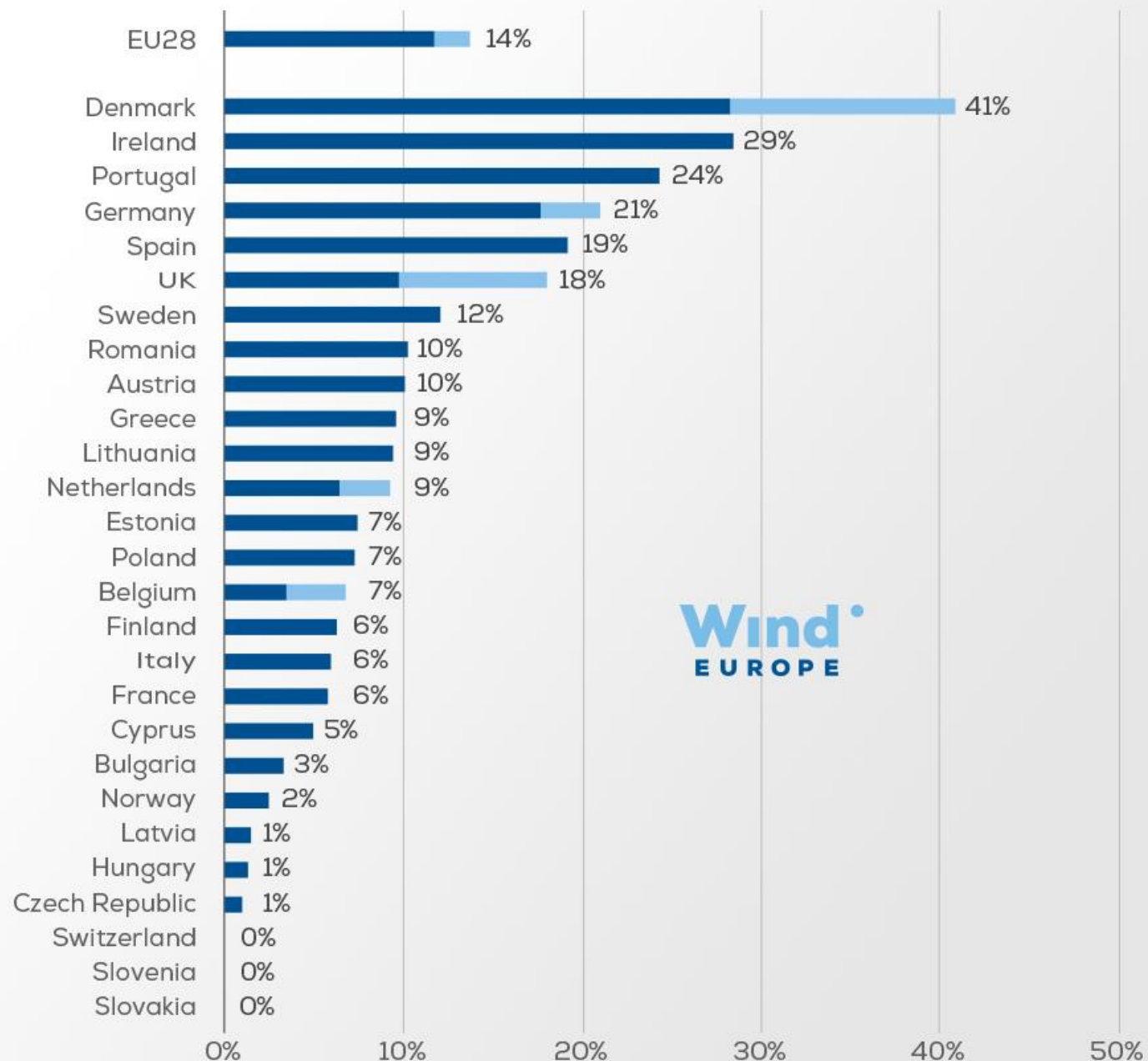
of installed wind capacity.

In January 2018 wind energy out performed gas **over a full month** for the first time.

Record for the most wind on the all-island system **broken three times** in 2018.

Ireland is now #1 for Onshore Wind

Percentage of the average annual electricity demand covered by wind



Wind
EUROPE

Total REFIT Pipeline ~4400 MW

	Total Installed	Total in Category	Number of Projects	Investment	Non-Compliance Costs	Jobs	CO2	% RES-E	% RES
	MW	MW		Million Euro	Million Euro		tCO2/year		
End 2017	3225								
Low Risk Projects 2018	3725	500	>20	1000	95	750	659,236	4.2%	1.0%
Low Risk Projects 2019	4000	275	6	550	52	413	362,580	2.3%	0.5%
Medium Risk Projects	4100	100	4	200	19	150	131,847	0.8%	0.2%
High Risk Projects	4400	300	13	600	57	450	395,542	2.5%	0.6%
Total for All Projects		1175	>43	2350	224	1763	1,549,204	10%	2%

But At least 200 MW of this is now very unlikely by 2020
So max for 2020 is ~4200 MW

REFIT Grace Period Request Declined



- Request:
 - Extend the 'energisation date' for REFIT2 projects from 31st March 2020 to the end of 2020
- Justification:
 - All projects connected in 2020 count towards the targets
 - Would result in Ireland meeting its 2020 renewable electricity target (SEAI latest forecast indicate a shortfall)
- Declined due to:
 - Previous extension provided
 - Not all delays deemed grid related
 - Better value with RESS and Corporate PPAs
 - Lower value of 2020 vs. 2019 contribution to target



We are now ~1 year away from the end of Ireland's most successful renewable policy framework to date



Wind Industry 2020

Target:
40% RES-E

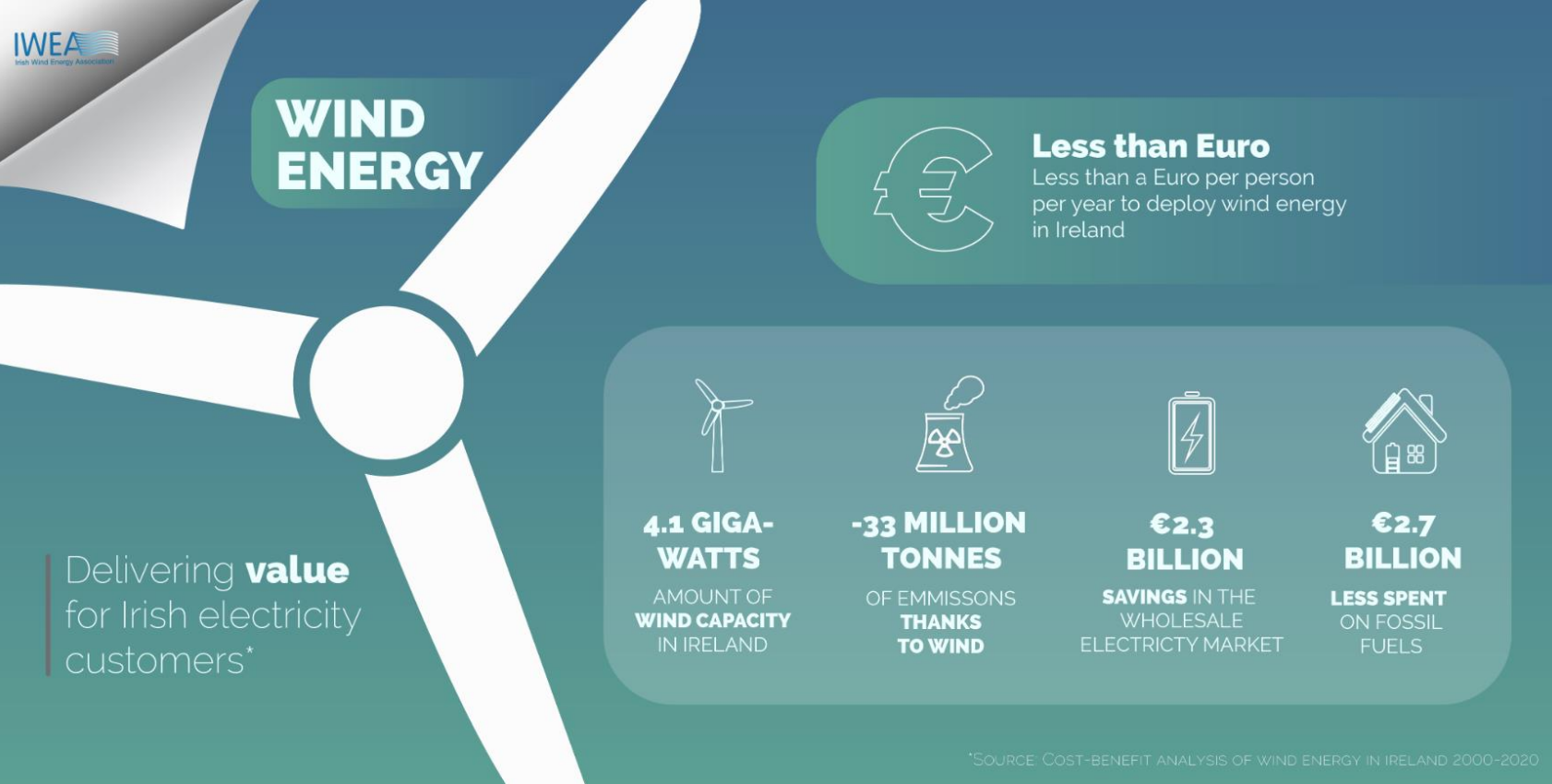
Financing:
REFIT

Grid:
Gate 3

Planning:
WEGs
2006

2020 Framework was Good Value:

€1/person/year OR
€2/ton carbon



Yates Country

Wind energy can provide
a silver-bullet solution to
€600m EU climate fines

**Blow me down! Wind
energy has cost only
€1 a year per person**

All Efforts Now on 2030 Policy Framework

ANOTHER DECADE OF GROWTH IS AHEAD OF US

Pillars of Wind Industry: 2030

Policy to Support Wind Energy to 2030

Target:
32% RES/
70% RES-E

Financing:
RESS /
Corporate
PPAs

Grid:
ECP

Planning:
WEGs
2018/
MAFA



Target = Volume

- First Draft of NECP released in Dec with 55% RES-E target but good news on volumes:
 - **Proposes 6500-7000 MW onshore and 1800 MW offshore by 2030**
 - IWEA key response was request for 70by30 – target supported by all renewable associations
- Reports suggest that 70by30 will be one of the recommendations from the Climate Action Committee (a question for **Session 2 tomorrow!**)



CLIMATE ACTION AND RENEWABLE ENERGY - PANEL SESSION
Deputy Hildegard Naughton, TD - Chair of the Oireachtas Special Committee on Climate Action
Deputy Eamon Ryan, TD, Leader, Green Party
Marie Donnelly, Renewables Ireland
Jim Gannon, Chief Executive, SEAI
Peter Harte, Director, Statkraft Ireland
Questions & Answers

Plans Plans Plans



- Climate Action Committee
 - Due mid March (70by30?)
- ‘All of Government’ Plan
 - Due end of March

TOP THREE OPPORTUNITIES FOR 2030 – PANEL SESSION	
Paddy Hayes, Managing Director, ESB Networks	
Aoife MacEvilly, Commissioner for Regulation of Utilities, CRU	
Peter Lynch, Head of Renewable Energy, Coillte	
Paul O'Donnell, Partner, Greencoat Renewables	
Peter Baillie, Managing Director, Energia Renewables	
Questions & Answers	
Lunch	

- NECP:
 - See timeline →



Renewable Electricity Support Scheme (RESS)



IWEA

- We have formalised positions on RESS1 fundamental principles, led by Markets Committee:
 - Price certainty; duration; risks; revenue stacking; delivery dates
- Now formalising more complex IWEA positions for auction design: qualification criteria; intervention levers; volumes/timings
- **COMMUNITY: IWEA is working on proposals for engagement, benefit, and shared investment**

TIMING

- No clear timelines from DCCAE for publication of Detailed Design – expected after the All of Government Plan, which would suggest at least April
- DCCAE still aiming for RESS 1 to take place before the end of the year (State Aid?)

Session 3:

MARKETS FOR OUR RENEWABLE ENERGY FUTURE

David O'Sullivan, Regulation Manager,
Brookfield Renewable Ireland

DCCAE

Evie Doherty, Senior Consultant, Cornwall Insight Ireland

John Melvin, Director, Energy Markets, CRU

Grid Connections: ECP (January Policy Forum)



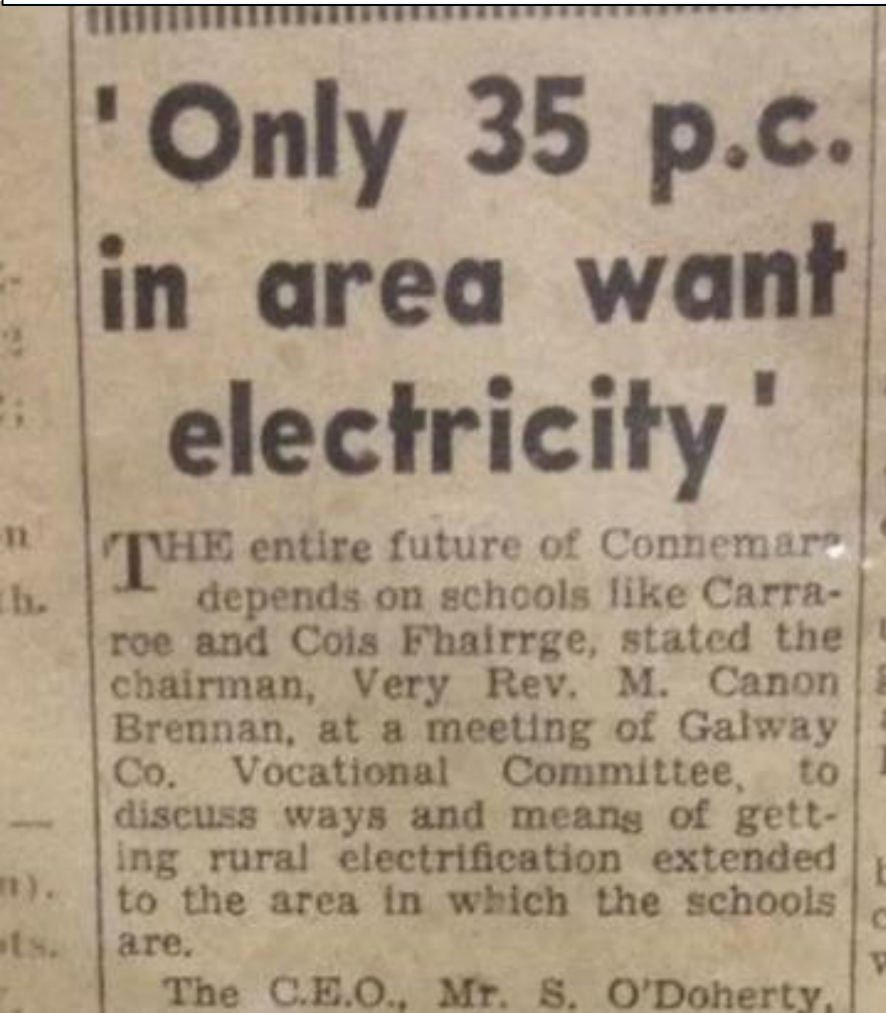
ECP1 – ONLY 580 MW WIND

	DSO	TSO	Total Applications	Total MEC (MW) ²
DS3				
Battery	10	7	17	351
Hybrid		1	1	20
Non-DS3				
Biomass	1		1	2
CCGT		2	2	33
CHP	2		2	9
Gas	1		1	2
Solar	40		40	252
Wind	18	3	21	294
Total new applications				963MW
Non-GPA fold in				
Solar	9	11	20	842
Wind	1		1	1
				843MW
Relocations				
Solar	25		25	156
Wind	6	3	9	280
				436MW
	113	27	140	

ECP2 – WORK UNDERWAY IN CRU

- CRU starting work on ECP-2
- IWEA has created a paper with our short and medium term priorities (Grid Committee)
- Stresses the need for a batch in 2020 – to avoid lengthy consultation proposed to use ECP-1 “batch 2”
- Short term priorities: prioritisation of renewables, prioritisation criteria for onshore to be date of planning grant, capacity handback, facilitating offshore, suggested batch size, community renewables

OVERCOMING CHALLENGES IN DEVELOPING NEW PROJECTS
Brian Keville, Environmental Director, MKO
Shane Carr, Director, Irwin Carr
Donal O'Sullivan, Head of Development, Statkraft Ireland
Ken Boyne, Director, Ionic Consulting
Questions & Answers



Wind Energy Guidelines (Will be in Session 4)

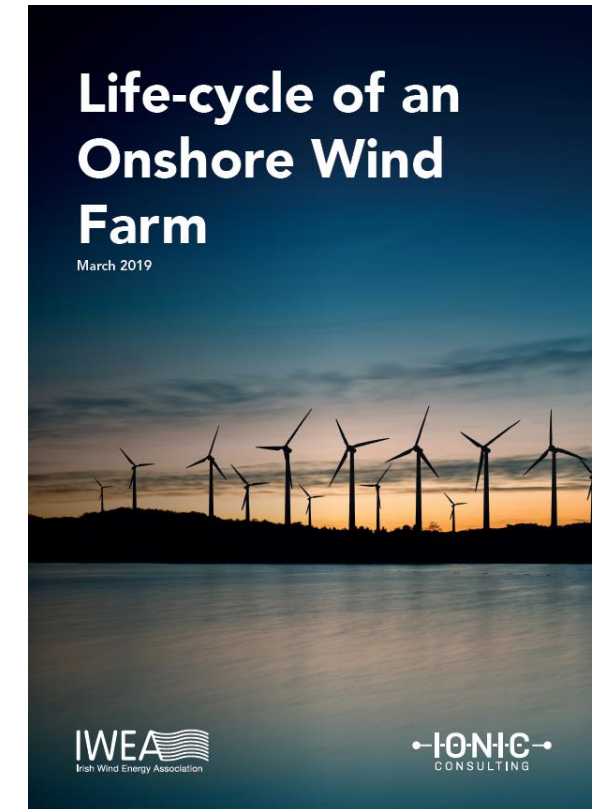
- Expected out very soon for consultation (within weeks)
- Most likely in line with '[Preferred Draft Approach](#)' from June 2017
- Delayed by World Health Organisation (WHO) noise guidelines released in [October 2018](#) – recommends $<45\text{bDL}_{\text{den}}$
- IWEA Planning Committee is trying to assess the impact on:
 - Curtailment
 - Cost to the consumer
 - Potential for future onshore wind
- Essential to account for balance between comfort of near neighbours and national decarbonisation objectives
 - 75% of people living <4 km wind farms supportive (NUIG research)

New Report Available Today (Session 4)

1.2 Wind Farm life-cycle stages

The life-cycle of a wind farm project is described in the following stages with each corresponding to a chapter in this report:

- Feasibility
- Planning and Permitting
- Pre-Construction
- Construction
- Commissioning
- Operation
- Decommissioning



Planning for Offshore – MAFA/Grid (and more in Session 1 tomorrow)



SESSION 1

TIME	OUR OFFSHORE WIND ENERGY FUTURE
9.45	Stephen Wheeler, Managing Director, SSE Ireland
9.55	Robbie Aherne, Head of New Connections, EirGrid Group
10.05	Philip Nugent, Principal Officer, Marine Spatial Planning Section, DHPLG
10.15	Drew Milne, Senior Policy Officer – Marine Planning (Offshore Renewable Energy) Marine Scotland
10.25	Jim Dollard, Executive Director, Generation Trading ESB
10.35	Questions & Answers
11.00	Tea, Coffee & Exhibition Viewing

- Key Benefits in Ireland

Large Sea Area/Potential

High Wind Speeds

High Capacity Factors

Sites Located Close to Shore

EU Benefits from Irish Location

Rates

- IWEA recently met with Valuation Office
- Commissioner will consider an IWEA proposal for a methodology that could be applied for wind farm rates
- Currently being prepared by Rates Working Group in the Asset Management Committee:
 - Will be arranging a Rates workshop for all members who want to attend – contact ross@iwea.com to attend



Pillars of Wind Industry: 2030

Policy to Support Wind Energy to 2030

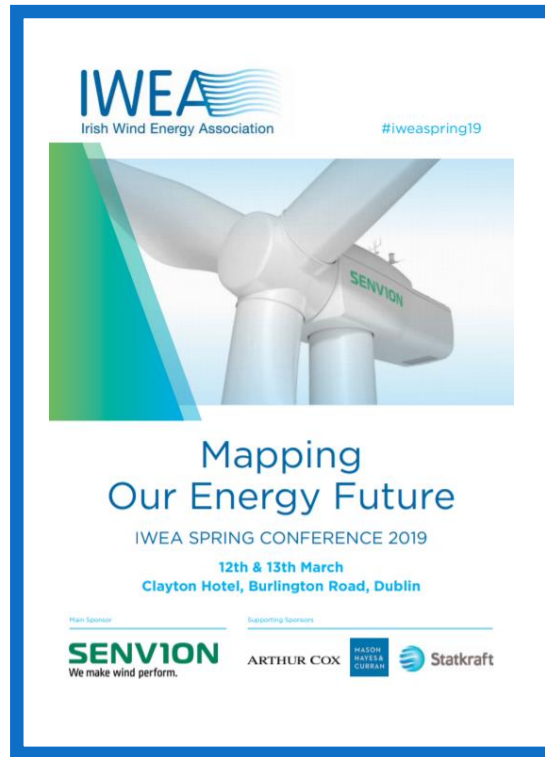
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Thank You

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- IWEA Chairs
- IWEA Members
- IWEA Staff