



ETIP HYDROPOWER

General Assembly 3rd meeting

December 1st, 2025



Funded by
the European Union

www.etip-hydropower.eu

Introduction - Agenda

Ref	Items	Time	Speaker / Action
1	Welcome <ul style="list-style-type: none"> - Introductory word from the Governing Board chairing team - Welcome by the Secretariat and overview of the current composition of the General Assembly 	09:30	Denis Aelbrecht (EDF)/ Peter Stettner (Andritz) / Anton Schleiss (ICOLD)
3	Working groups update <ul style="list-style-type: none"> - Current activities of the 3 working groups & next steps 	09:40	Lee Estrellado (vgbe), Tasniem Jawaid (EREF), Andrej Misech (EUREC)
4	Scientific Advisory Board update <ul style="list-style-type: none"> - Current focus and activities 	10:10	Anton Schleiss (ICOLD)/Ole Gunnar Dahlhaug (NTNU)
5	ETIP HYDROPOWER Business plan <ul style="list-style-type: none"> - Status of the business plan for a self-sustainable ETIP HYDROPOWER platform 	10:20	Anton Schleiss (ICOLD)/ Jean-Jacques Fry (ICOLD)
5	Brussels Hydropower Day 2026 update <ul style="list-style-type: none"> - Outlook to Brussels Hydropower Day 2026 	10:35	Iraia Nunez (Zabala) & Anton Schleiss (ICOLD)
6	Q&A	10:40	ALL
7	AoB	10:50	ALL
	Meeting end	11:00	

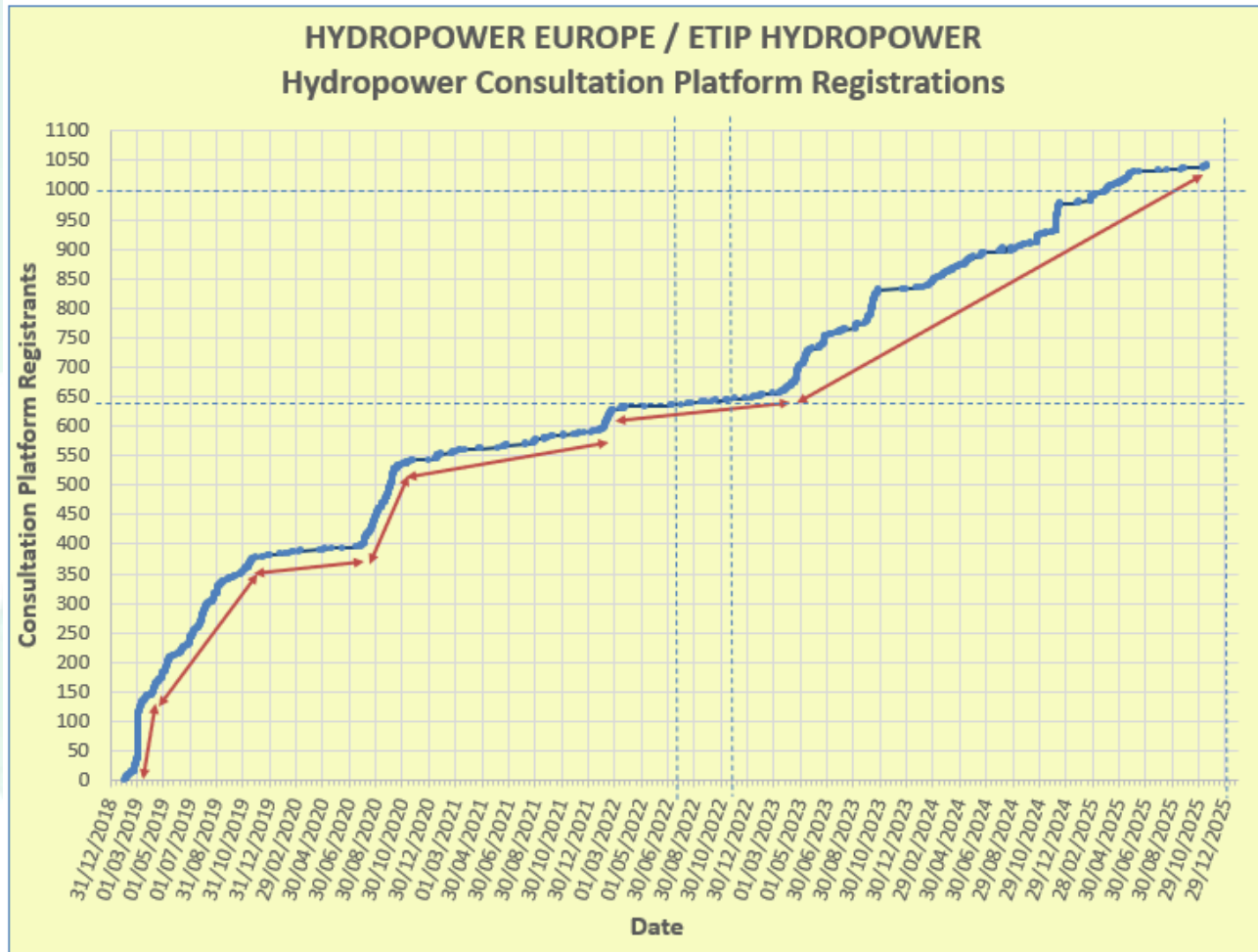
Welcome & introduction

Purpose of the Annual General Assembly meeting

- 1) Receive update about the:
 - ETIP HYDROPOWER platform and its on-going and future activities
- 2) Discuss issues and ask any questions you might have

Welcome & introduction

Overview of the current composition of the General Assembly



Country	Reg	Country	Reg	Country	Reg
Albania	11	Greece	27	Poland	6
Austria	48	Hungary	2	Portugal	34
Belgium	60	Ireland	8	Romania	14
Bosnia & Herzegovina	5	Italy	83	Serbia	7
Bulgaria	10	Kosovo	1	Slovakia	4
Croatia	2	Latvia	0	Slovenia	11
Cyprus	0	Lithuania	3	Spain	38
Czech Republic	5	Luxembourg	2	Sweden	53
Denmark	0	Macedonia	12	Switzerland	73
Estonia	2	Malta	1	Turkey	19
Finland	9	Moldova	2	UK	34
France	221	Montenegro	3	Ukraine	3
Georgia	3	Netherlands	23		
Germany	78	Norway	30		
				Total	947
				40 Countries	90.9%

CP registrants across the European Region

Country	Reg	Country	Reg	Country	Reg
Afghanistan	2	Egypt	1	Pakistan	10
Argentina	2	Ethiopia	2	Peru	1
Australia	3	Guatemala	1	Russia	2
Bhutan	1	Iceland	2	Sri Lanka	1
Bolivia	1	India	15	Swaziland	1
Brazil	4	Indonesia	1	Uganda	2
Cameroon	1	Japan	3	Uruguay	1
Canada	4	Kenya	1	USA	12
Chile	1	Korea	1	Uzbekistan	2
China	3	Laos	2	Vietnam	1
Colombia	2	Nepal	7		
Ecuador	1	New Zealand	1		
				Total	95
				34 countries	9.1%

CP registrants outside of the European Region

Total CP Registrants 1042



ETIP HYDROPOWER

Working Group Updates

December 1st, 2025



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ETIP HYDROPOWER: Working Groups

- Established in Spring 2024 and began meeting in Summer 2024
- To support the achievement of the overall missions and goals of ETIP HYDROPOWER
- Consisting of all interested stakeholders and experts from different hydropower sectors and stakeholder groups

Working Groups: Tasks

- Per the Terms of Reference, the tasks of the thematic working groups comprise among others:
 - To identify, prioritise and draft the key Hydropower R&I topics / messages based on the Research and Innovation Agenda (RIA) to achieve the Energy Transition and the REPowerEU targets;
 - To draft White papers to increase public awareness of hydropower based on the Strategic Industry Roadmap;
 - To propose urgent R&I topics to the European Commission to help achieve the European Green Deal;
 - To draft technical statement reports;
 - To update existing R&I documents including the RIA;
 - To facilitate strategic actions from the Strategic Industry Roadmap.

Established Working Groups

ETIP HYDROPOWER has established 3x topic-specific and 1x cross-cutting Working Groups (WG) :

- **WG1: Hydropower role for flexibility and storage**
- **WG2: Hydropower and Biodiversity**
- **WG3: Hydropower and Climate change (adaptation and mitigation)**
- **WG-A: Overview on past and current European R&I projects for hydropower - Horizon Projects: follow-up and results dissemination**

WG1: Hydropower role for flexibility and storage

General Scope

- Establish and communicate with accessible language what flexibility and storage needs mean
 - Show the key and increasing role of Hydropower in response to these flexibility and storage needs, including market evolution consideration
 - Identify implications for operation, maintenance and resilience of existing equipment, identify the potential of innovations: XFLEX-Hydro innovations deployment, needs of new assets (pumped-storage), etc.
-
- **WG1 kicked off on June, 20th 2024**
 - **Working Group Members:
73 (plus Chair Team)**

	Name	Surname	Organization	Country
Chair	Eduard	Doujak	TU Wien	AUSTRIA
Co-Chair	Liv R	Hultgreen	FME HydroCen - NTNU	NORWAY
Co-Chair	Irena	Beloreshka	Technical University of Sofia	BULGARIA

→ Supported by vgbe energy

WG1: Status of Activities

To work more efficiently, the WG was divided into 3x Sub-Groups (SG)

- SG1: Flexibility Definition
- SG2: Technical Aspects
- SG3: Economic Aspects

Group	Full Working Group	Sub-Group 1: Definition	Sub-Group 2: Technical	Sub-Group 3: Economic
Meeting 1	10.02.2025 13:00 – 15:00	30.01.2025 13:00 – 15:00	27.01.2025 14:00 – 15:30	31.01.2025 14:00 – 15:30
Meeting 2	17.03.2025 13:00 – 15:00			
Meeting 3	18.08.2025 13:00 – 15:00			
Meeting 4	01.12.2025 13:00 – 14:30			

Key questions being explored

- **What are Europe's needs for flexibility?** Incl. regional differences in supply/demand, need for grid update/upscale, security of energy supply
- **Hydropower can offer operational flexibility:** Hydropower's advantage in offering flexible supply of power/energy, compared to wind/ solar/ thermo-plants/ etc. Pumped storage, short start-time, duration of flexibility, ...
- **Hydropower can offer flexibility with respect to multi-purpose use of hydropower:** Power, drinking water, industry water, irrigation, flood mitigation, ...
- **Hydropower can offer grid regulation flexibility:** Hydropower's ability to regulate and deliver good grid flexibility

WG1: White Paper – Timeline

Timeline:

- Mid-February → The WG concluded its work on the White Paper
- 26.02-16.03 → White Paper was sent to the GB for commenting
- 17.03-23.03 → Small adaptations made
- **24.03-30.03 → GB Approval voting (online)**
- 09.04 → GB meeting after Brussels Hydropower Day
 - Discussed how to proceed with the White Paper → creation of a “Task Force” from the GB
- Mid-May – Mid-July → Task Force exchanges / revisions
- 15.07-07.08 → Resubmitted for approval to GB
 - **Approval Received!**
- 10.09 → Soft release of White Paper at the IHA International Forum on Pumped Storage Hydropower
- **08.10 → Full release of White Paper with Webinar !**
- 08.10 onwards → Dissemination activities
 - LinkedIn, emails, presentations at events, etc.

WG1: White Paper – Release

The White Paper was officially released on October 8th

- A first version was shown at the **IHA Pumped Hydropower Forum (Sept. 9th)**, however, the final release was coordinated with the Webinar
- The webinar was well attended with

292

Viewed registration page

141

Registered

99

Attended

3

Cancelled registrations

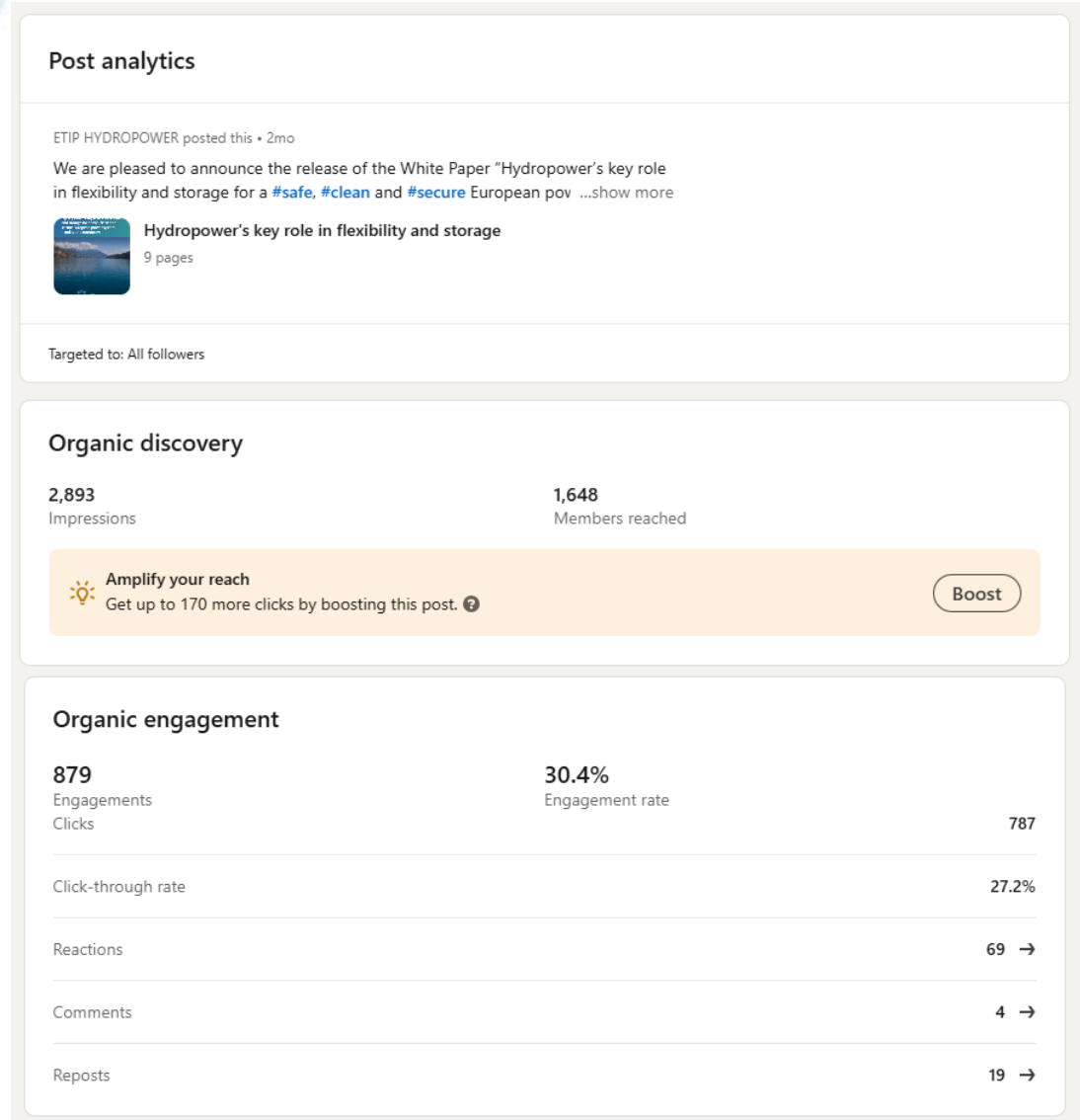
Thank you to **Eduard, Irena and Iraia**
for supporting the webinar!



The screenshot shows a webinar interface. The main slide has a blue background with a mountain landscape and white text: "HYDROPOWER'S KEY ROLE IN FLEXIBILITY AND STORAGE FOR A SAFE, CLEAN AND SECURE EUROPEAN POWER SYSTEM – TODAY AND TOMORROW WHITE PAPER PRESENTATION". At the bottom of the slide, it says "Working Group 1", the ETIP HYDROPOWER logo, and "October 8, 2025". On the right side, there is a vertical list of participant video feeds with names: Lee William Estrellado, Irena Beloshika, Iraia Nunez, Doujak, Eduard, and Marla Rodriguez. At the bottom right, there are icons for "JC" and "+27".

WG1: White Paper – Dissemination

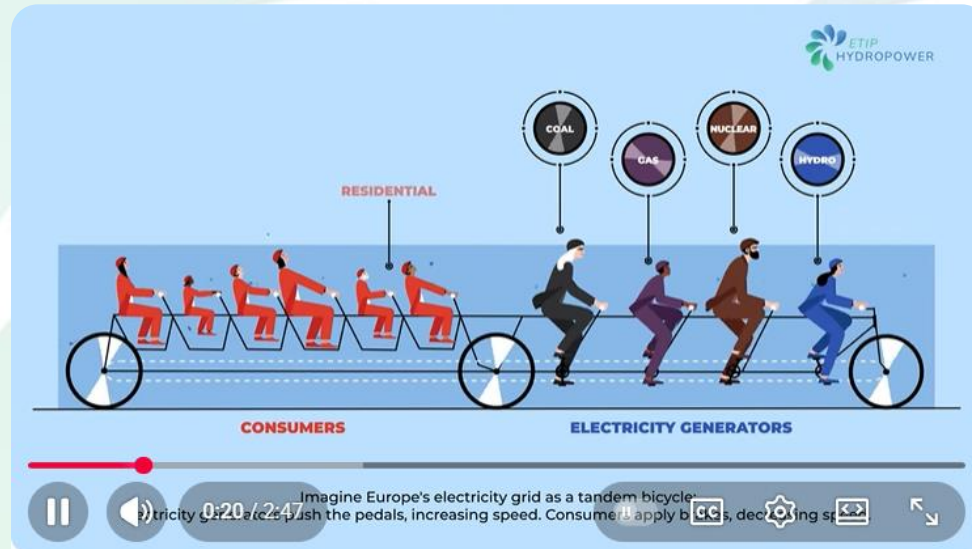
- LinkedIn, emails, etc.
- Presentation at HydroES 2025
(Thanks to Maryse Francois)
- Presentation at AQUAWATT
(Thanks to Leonardo Nibbi and Antonella Frigerio)
- Presentation at ExCo Meeting IEA
HYDRO and ENLIT
(Thanks to Anton Schleiss)



WG1: White Paper – Links

- **White Paper download:**
https://etip-hydropower.eu/assets/White-Papers/WG1_WHITEPAPER_FINAL.pdf
- **Webinar recording:**
<https://www.youtube.com/watch?v=xO-HpEJR4lc>
- **LinkedIn post:**
https://www.linkedin.com/posts/etiphydropower_hydropowers-key-role-in-flexibility-and-activity-7374000418806403072-zKRn

- Video was released on May 7th



Hydropower's Role in Ensuring Flexibility and Storage



675 views 6 months ago

ETIP HYDROPOWER Working Group 1 has developed an engaging video that showcases hydropower's vital role in supporting flexibility and storage across Europe, exploring how hydr ...more

Press Release

For Immediate Release
7th May 2025

New Video Highlights Hydropower's Critical Role in Ensuring Flexibility and Storage

Brussels, Belgium — The ETIP HYDROPOWER project is excited to announce the launch of a new, engaging video that showcases hydropower's vital role in supporting **flexibility** and **storage** across Europe. The video, produced by **Working Group 1**, explores how hydropower can meet the growing demands of Europe's electricity grid, ensuring a stable, flexible, and resilient energy system.

In the video, hydropower is compared to a "cyclist" helping to maintain the **balance** of the grid. Just as cyclists adjust their effort to keep a tandem bicycle at the right speed, hydropower plants help adjust power generation in response to the changing demand for electricity. With the increasing integration of variable renewable energy sources, such as wind and solar, hydropower's ability to provide **grid stability** is more important than ever.

The video highlights key advantages of hydropower, including:

- **Flexibility:** Hydropower can rapidly adjust power output, making it a critical resource for grid balancing.
- **Energy Storage:** Pumped storage hydropower systems act like batteries, storing excess energy for later use.
- **Multi-purpose Benefits:** Hydropower also provides water for drinking, industry, irrigation, flood control, and much more.

ABOUT ETIP HYDROPOWER

ETIP HYDROPOWER is committed to advancing its Research and Innovation Agenda (RIA) and Strategic Industry Roadmap (SIR), which focus on addressing current and future energy challenges. By uniting stakeholders from academia, industry, and research, ETIP HYDROPOWER aims to highlight the strategic role of hydropower in achieving **climate neutrality** and ensuring the long-term sustainability of Europe's energy systems.

Working Group 1 "Hydropower's role in flexibility and storage" explores the evolving flexibility and storage needs of the power system, highlighting hydropower's key role and examining implications for operations, innovation, and future assets.

Link to the video here:

For more information about ETIP HYDROPOWER, please contact:

Iraia Núñez
Email: inunez@zabala.eu

Janire García
Email: janiregarcia@zabala.eu



WG2 Topic: Hydropower & Biodiversity

General Scope

- Highlight in accessible language state-of-the-art hydropower plants and existing solutions to key biodiversity issues politically discussed at national and EU level: Implementation of RED III and the Nature Restoration Regulation at national level; CIS WG discussion on ***free-flowing rivers, e-flows, sediment management, water quality in reservoir, GHG emissions***, etc.)
- Produce concise white-papers, fact-sheets etc. with actual representative case studies and update/maintain bibliography of scientific articles
- Identify needs for developing environmentally compatible solutions, incl. eco-design solutions, environmental footprint and LCA issues
- Foster the cooperation with national and European decision-makers and regulatory agencies
 - Help work on social acceptance of hydropower infrastructure

WG2: Status of Activities

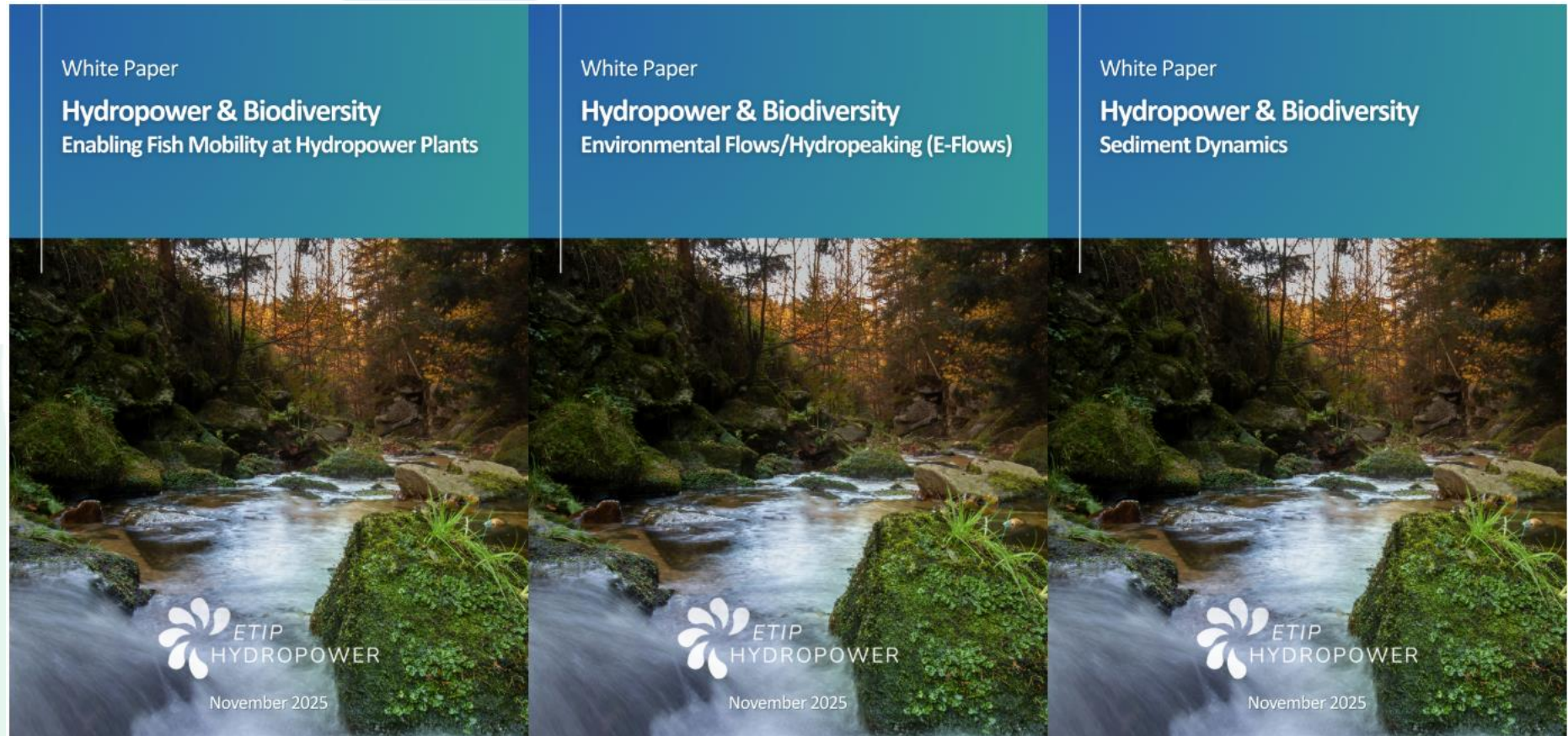
- **Kick-off:** 25.06.2024
- **Chair:** Christoph Hauer (BOKU University Vienna, Austria)
- **Co-Chairs:** *Natalie Rojko* (Energyminer GmbH, Germany) and *Anastasius G. Youtsos* (Energy & Environment Scientific Committee of the National Research & Innovation Council, Greece)
- **Around 30 Members** (plus Chair-Team): Broad professional and national background to cover the WG 2 spectrum in 3 Sub-Working Groups (SWGs).
- WG2 is supported by EREF (European Renewable Energy Federation)

SWG	SWG Topic	SWG-Chair
SWG-A	Environmental impacts and good practise	Christoph Hauer
Team A1	Fish Mobility	Jeffrey Tuhtan
Team A2	Instream Flows	Klaus Jorde
Team A 3	Sediment Dynamics	Christoph Hauer
SWG-B	Legislative Follow-Up	Natalie Rojko
SWG-C	Scoping of the topic <i>Biodiversity and Hydropower</i> plus identifying RI needs	Tassos Youtsos

WG2: White Paper Release

The 3 White Papers have been finalised on 18.11.2025 and released on **20.11.2025**.

All White Papers can be downloaded on the **ETIP HYDROPOWER Website**.



WG2: Webinar for the White Papers

- **20.11.2025;** 14.00-15.30h
- **98 participants** (more than 140 registrations)
- **Presenters:**
 - Jeffrey Tuhtan
 - Klaus Jorde
 - Christoph Hauer
- **Moderation:**
 - Tasniem Siegfried Jawaid
- **Technical Set Up/Q&A:**
 - Iraia Nuñez



General Scope

- Scope covers both climate **adaptation** (resilience) and climate **mitigation** (reduction of GHG emissions)
- Establish and communicate with accessible language what are the **key issues in relation to climate change**, both in terms of **risks and opportunities** :
 - Risks: reduction of inflows in some regions and uncertainty on flow risk evolution
 - Opportunities: increase of inflows in some other regions and new equipment in periglacial areas; hydropower reservoirs as multi-purpose tools to increase the resilience of combined Hydro-Solar, Hydro-Wind power solutions to reduce GHG emissions in power generation; etc.
- Illustrate issues with some representative **case studies**
- Identify **R&I needs for increasing knowledge** and develop **solutions to limit climate change risk**, and foster **climate-induced opportunities**

WG3: Status of Activities

The WG was divided into 3x Sub-Groups (SG) during the White paper development to work more efficiently:

- Sub-WG1: **Adaptation**
- Sub-WG2: **Mitigation**
- Sub-WG3: **Water-energy nexus**

Chairing team				
	First Name	Surname	Organization	Country
Chair	Benjamin	Graff	CNR (Compagnie Nationale du Rhône)	FRANCE
Co-Chair	Ibrahim	Halil Demirel	Batman University	TURKEY
Co-Chair	Silvia	Richard	CONEXIG	FRANCE
Total number of members		43		

[Supported by EUREC]

Group	Full WG	Sub-WG1	Sub-WG2	Sub-WG3
Meeting 1	20 Jun 2024	14 Oct 2024	7 Oct 2024	21 Oct 2024
Meeting 2	5 Aug 2024	8 Nov 2024	30 Oct 2024	29 Jan 2025
Meeting 3	27 Sep 2024	31 Jan 2025	27 Nov 2024	
Meeting 4	8 Nov 2024		10 Jan 2025	
Meeting 5	27 Feb 2025		6 Feb 2025	
Meeting 6	6 Nov 2025			

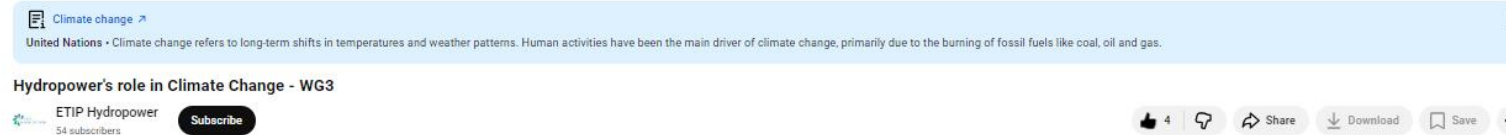
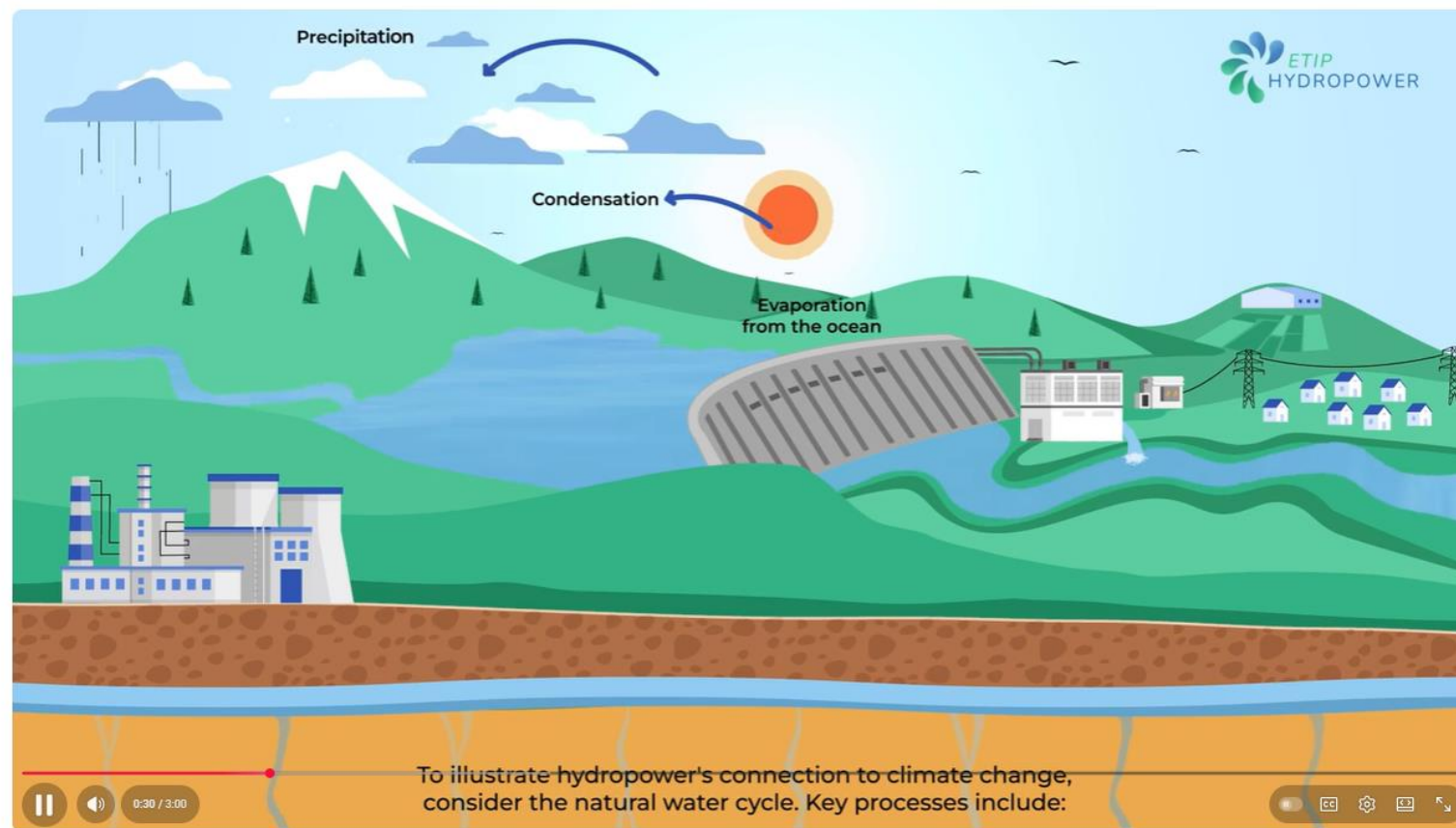
WG3: Status of Activities

Key recently completed & current activities:

- List of definitions and limits (i.e. scope of each sub-WG)
- SWOT Analysis: a SWOT analysis to identify the Strengths, Weaknesses, Opportunities, and Threats related to the area of interest
- Use SWOT analysis to formulate key take-away messages and technical recommendations
- Prepare presentation on the outcomes of the above for the Brussels Hydropower Day 2025
- Video development
- White paper development (based on the SWOT analysis)

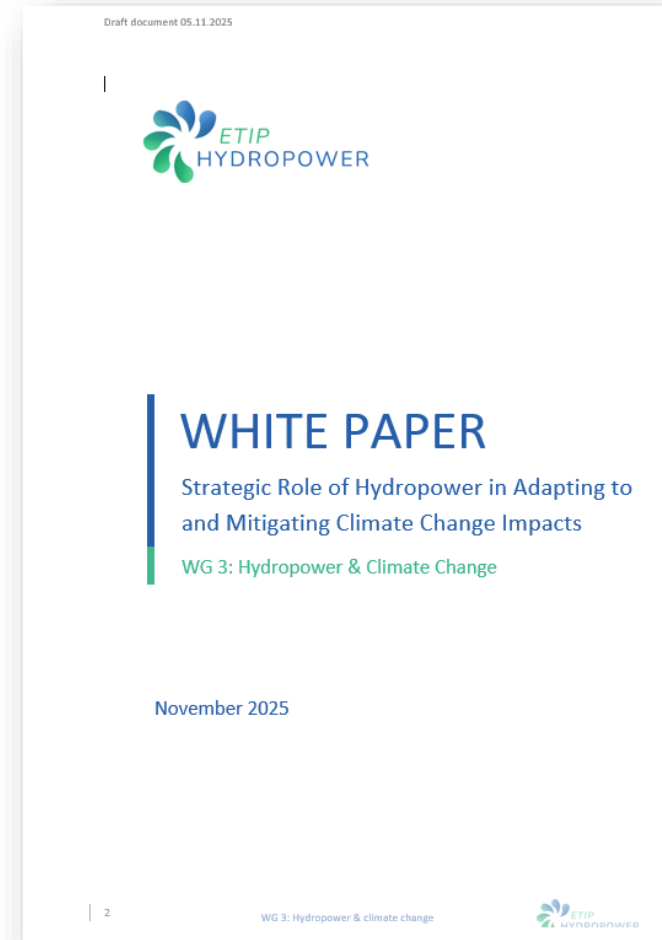
WG3: Status of Activities

- Video development – **finalised**
- Video has been published on Monday 10 November [[link](#)]
- The video is currently being shared with relevant stakeholders as done with WG-1 video



WG3: Status of Activities

- WP preparation – final review & approval in the Governing Board – **completed!**
- The document has undergone several rounds of reviews by WG-3 members and some GB members.
- Its tone has been revised to adopt a more positive approach throughout.
- Final formatting of the document will commence in the coming days (i.e. including the cover page).
- Launch webinar for the WP will be organised in January 2026.



WG-A: Overview on past and current European R&I projects for hydropower - Horizon Projects: follow-up and results dissemination

General Scope

- Follow-up the Horizon projects related to hydropower: **Cluster Hydropower created**
- Motivate and facilitate the organization of Special sessions at conferences with hydropower as a topic on the outcomes of these projects.
 - A first session moderated by ETIP HYDROPOWER could be hold during HYDRO 2025 (October) in Thessaloniki in Greece “European Initiatives Supporting Hydropower”.
 - Presence with booth/banners at Brussels Hydropower Day (April), PSH Forum in Paris (September) and ENLIT EUROPE in Bilbao (November).
- Create a discussion forum among these projects with short webinars (after 3 in 2024):
 - 26. 2. 2025: **Boosting Hydropower IV: Best practices for research**
 - 14. 5. 2025: **Boosting Hydropower V: Best practices for research**

Next Webinars: February and Mai 2026

Organization

ETIP Secretariat: ICOLD

Confirmed Members: ~20

WG-A

Chair:	Emanuele Quaranta, JRC, Italy
Co Chairs:	Stevcho Mitovski, University Ss C&M, Macedonia Lias Zafeiropoulos, Ubitech Energy, Belgium

WG Next Steps: Deliverables

- **White Papers**

- Will be finalised and launched through webinars, if this has not already been done

- Other activities specific to the Working Groups and to the interests of their members
 - Being supported by Secretariat partners

More detailed discussions on the future activities across WGs will be held in the coming weeks.

Scientific Advisory Board

Activities in 2025:

➤ Meeting 4 on February 19, 2025

The main purpose was to discuss 1) the results of the survey of EERA and ETIP members for feedback on research priorities Horizon Europe 2026 Call and the procedure for the preparation of the R&I statement with priorities to be sent to EC, 2) the result of the questionnaire regarding hydropower education in Europe done in the framework of a COST action. After the meeting the SAB members had the opportunity to participate to the MEP cocktail in the evening which was organized by ETIP HYDROPOWER.

➤ Meeting 5 on July 2, 2025

The main purpose was to discuss the process for giving input to Framework Programme FP10 and the preparation of a SRIA in view of the creation of an SET-Plan implementation working group

Workshop on October 9, 2025

SAB participated to the joint workshop EERA JP Hydropower & ETIP HYDROPOWER: Towards a shared vision with the purpose to prepare a position paper “Hydropower for a Resilient, Secure, and Competitive Europe -Maximizing Impact Through FP10 and a Dedicated SET Plan Implementation WG” and “Recommendations for future calls of Research and Innovation projects for hydropower technologies”.



ETIP HYDROPOWER

ETIP HYDROPOWER Business plan
(for a self-funded organisation)

1st December 2025



Funded by
the European Union

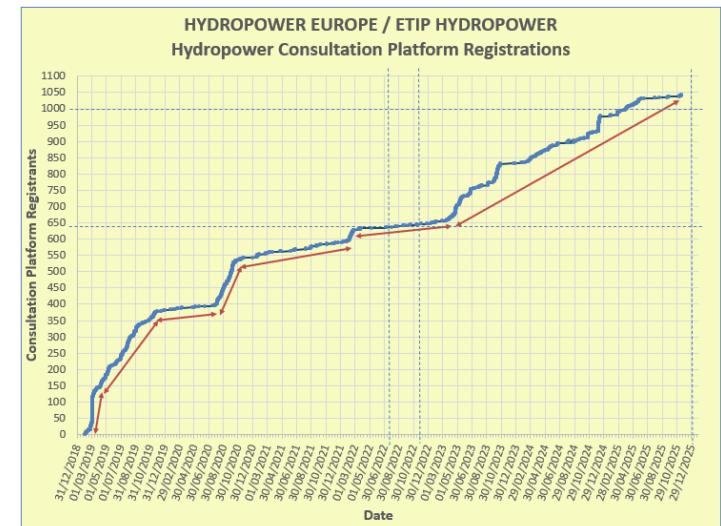
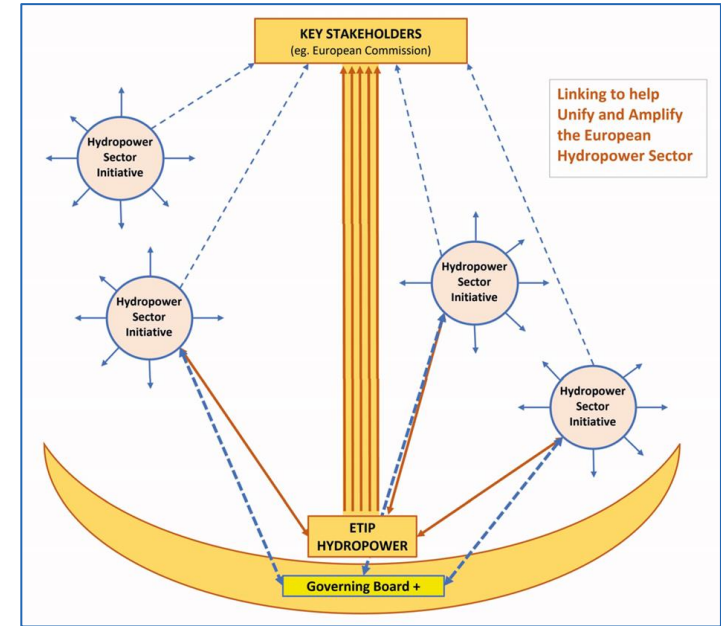
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Business Plan for a Sustainable ETIP HYDROPOWER

The action to plan for a sustainable ETIP HYDROPOWER in the form of a business plan is embedded in the current work programme, prompted by the EC call text.

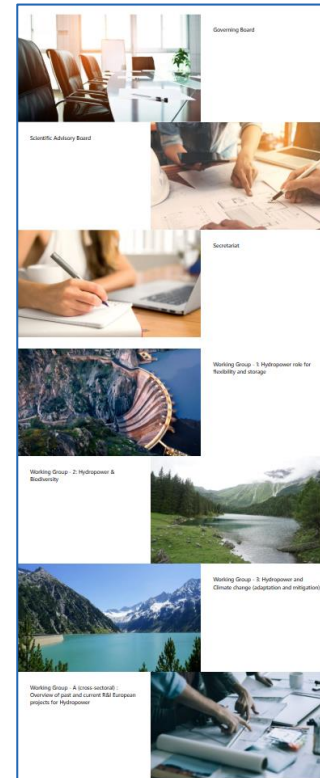
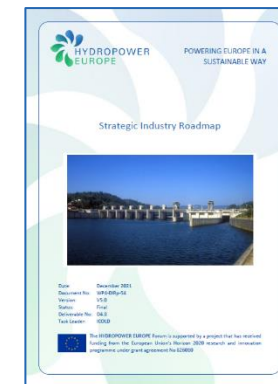
During 2025 we have been working with the Governing Board to:

- Refine service level options
- Investigate potential interest



A reminder: What Does the ETIP HYDRO do for us?

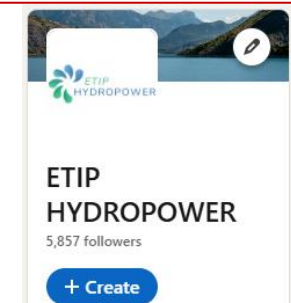
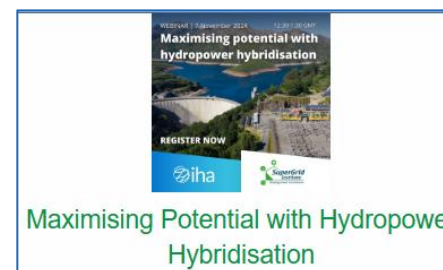
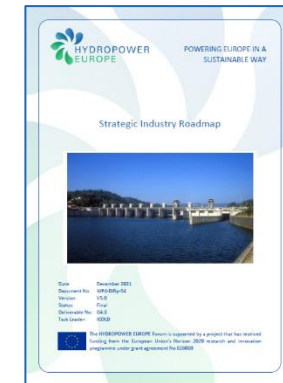
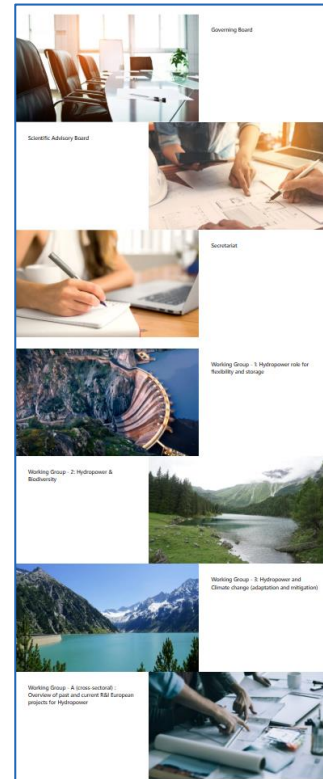
- Helps unite the *Hydropower in Europe Community*
- **EC SET Plan** representation / engagement with other RE ETIPs
- Supports the ETIP Governance structure
 - GB / SAB / WGs etc
- Created and implements the annual **Brussels Hydropower Day**
- Developed the **Research & Innovation Agenda (RIA)**
- Developed the **Strategic Industry Roadmap (SIR)**



A reminder: What Does the ETIP HYDRO do for us?

- Supporting Research & Innovation
 - HERI Platform
- Raising awareness of hydro with outreach via
 - Webinars
 - Social media, news, consultation...

All funded to date by the EU...

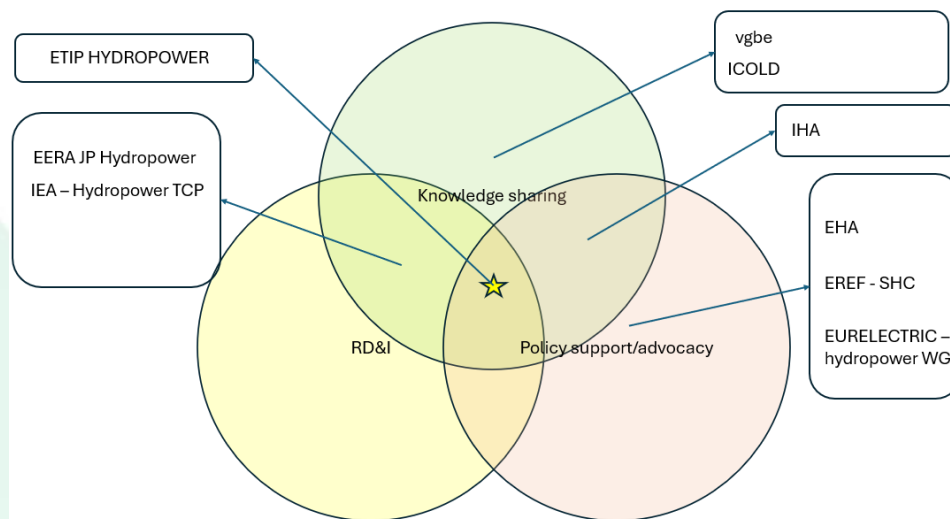
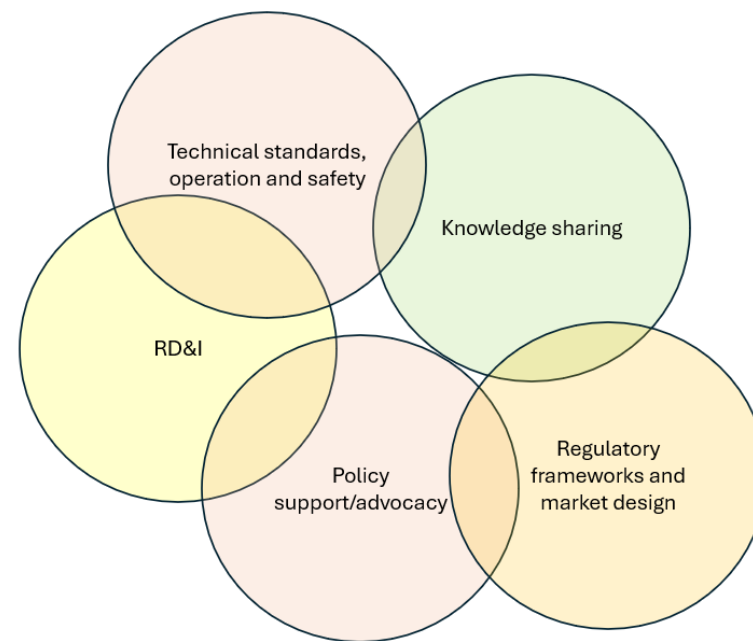
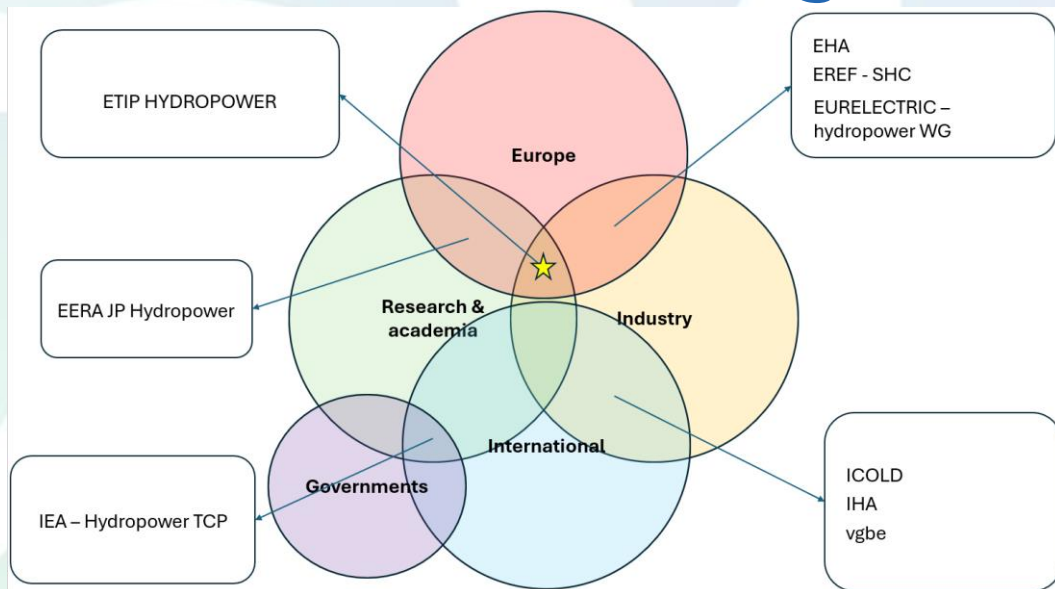


What are the other industries doing ?

- Every other energy industry in Europe has a double-based organization : ETIP + an independant association

Industry	ETIP	Association
Solar PV	ETIP-PV : https://etip-pv.eu/	Solar-Power-Europe : https://www.solarpowereurope.org/
Wind	ETIP-Wind : https://etipwind.eu/	WindEurope : https://windeurope.org/
Batteries / Storage	Batteries-Europe : https://batterieseurope.eu/	BEPA / Batt4EU (PPP) : https://bepassociation.eu/ EASE : https://ease-storage.eu/
Hydrogen	?	HydrogenEurope : https://hydrogeneurope.eu/
Smart Grid / demand flexibility	ETIP-SNET : https://smart-networks-energy-transition.ec.europa.eu/	Smart-EN : https://smarten.eu/
Nuclear	[SNETP : https://snetp.eu/]	SNETP : https://snetp.eu/

What are other hydropower associations doing?



Different potential ETIP service levels

Following consultation and discussion we have condensed ideas for the future of the ETIP into 5 service level options.

These range from doing less to more than we currently do.

Annual cost estimates are calculated.

Service Level	Benefits	Cost/yr
[0] 75% Current Service Level	Scope similar to [1] below, but at a reduced (-25%) rate of activity No new development actions for R&I facilitation or new initiatives.	€250K/yr
[1] ETIP at Current Service Level (i.e. ETIP HYDROPOWER 2022-2025)	<ul style="list-style-type: none"> Hydropower participation in the EC SET Plan & responding to EC on policy issues HYDRO ETIP Governance (GB, SAB, WGs, GA) & ETIP HYDROPOWER network (via Consultation Platform) Annual Hydropower Day R&I facilitation – maintaining & developing HERI Raising awareness of hydropower – public & industry – webinars & participation in events 	€333K/yr
<i>Service Levels 2-3-4 require an Association to be established. Add service levels, benefits and costs cumulatively.</i>		
Establishing an Association & Providing a minimum 'ETIP' service	<ul style="list-style-type: none"> Creation of a Hydropower Association (legal entity, ToR etc) and Annual Management of membership (registration, fees etc.). ETIP Hydro participation in SET Plan & responding to EC on policy issues ETIP Governance (GB, SAB, WGs, GA) Annual Hydropower Day 	€25K setup €100K/yr
[2] Focus on Facilitating Hydropower Industry Collaboration on R&I	<ul style="list-style-type: none"> Create digital versions of RIA and SIR / update annually online. Expand HERI to offer wider services (RIA & SIR, WGs etc). Annual R&I facilitation workshop (in series with Hydropower Day); annual midyear online meeting. Facilitate industry collaboration on R&I actions by identifying priority R&I actions (not addressed elsewhere), organisations interested to co-fund and / or co-implement. Implement priority projects through direct collaboration / contracting. Provide updates on potential R&I funding opportunities. Facilitate industry collaboration on R&I funding opportunities (i.e. collaborative proposal development). Small projects (€50-100K) programme; all participating members contributing; implement 1-2 small projects per year 	€75K setup €215K/yr
[3] Focus on Raising Awareness of Hydropower in Industry, Public & NGOs	Communication activities (webinars, video, social media, news etc.): <ul style="list-style-type: none"> Industry Awareness: social media & website content; webinars Public Awareness: 2 online events / yr linked with social media campaigns NGO Awareness: 2 online events / yr linked with social media campaigns 	€125K/yr
[4] Focus on Capacity Building for the Hydropower Industry	Capacity building activities comprising: <ul style="list-style-type: none"> Shared lessons: 2 online events per year Technical visits: 1 event per year Universities innovation competition: Annual event Training professionals on emerging issues: 2 webinars per year 	€125K/yr

Service levels options

Report Ref	Service Level	Service Level Title	Annual cost k€/yr	one-time setup cost k€	Financed by	More detailed key elements of service level
1	1	ETIP Continues with its Current Service Level	333		EC 2022-25	see current ETIP activity : RIA and SIR updates, Hydropower day, WG's management, webinars, SET-Plan support
0	2	ETIP Service Level at reduced ambition	250		EC 2026-28*	see current ETIP activity at reduced ambition
Assoc	2b	Minimum ETIP-like management support (GB, SAB, WG's, Hydropower day)	100	25	Association	Minimum ETIP-like management support to ETIP-like activities : GB, SAB, WG's, Hydropower day, 1 or 2 webinars/yr, SET-Plan support
2a	3a	A Focus on Facilitating Research & Innovation	100	60	Association	Online RIA and SIR ; HERI platform expanded
2b	3b	(3a +) Implement Industry Collaboration on R&I Priorities	90	15	Association	3a + management of industry-driven co-funding R&I projects (projects are implemented by members or contractors, or a mix)
2c	3c	(3b +) Small projects programme	25		Association	3b + Definition and development of a "small projects" programme (1 or 2 / yr)
3	4	Focus on Raising Awareness of Hydropower in Industry, Public & NGOs	125		Association	Increased activities on webinars, video, social media, ...
4	5	Focus on Capacity Building for the Hydropower Industry	125		Association	Increased training, networking and knowledge transfer activities

Service levels scenarios

Report Ref	Service Level	Service Level Title	Annual cost k€/yr	one-time setup cost k€	Financed by	Scenario A	Scenario B	Scenario C	Scenario D	Scenario E	Scenario F	Scenario Fb
1	1	ETIP Continues with its Current Service Level	333		EC 2022-25	1	0	0	0	0	0	0
0	2	ETIP Service Level at reduced ambition	250		EC 2026-28*	0	1	0	0	0	1	0
Assoc	2b	Minimum ETIP-like management support (GB, SAB, WG's, Hydropower day)	100	25	Association	0	0	1	1	1	0	1
2a	3a	A Focus on Facilitating Research & Innovation	100	60	Association	1	1	1	1	1	1	1
2b	3b	(3a +) Implement Industry Collaboration on R&I Priorities	90	15	Association	1	1	1	0	0	1	1
2c	3c	(3b +) Small projects programme	25		Association	1	1	1	0	0	1	1
3	4	Focus on Raising Awareness of Hydropower in Industry, Public & NGOs	125		Association	1	1	1	1	1	0	0
4	5	Focus on Capacity Building for the Hydropower Industry	125		Association	1	1	1	1	0	0	0
					Total Annual Cost	798	715	565	450	325	465	315
					EC financing	333	250	0	0	0	250	0
					Association financing	465	465	565	450	325	215	315

WHY THE HYDROPOWER SECTOR NEEDS COLLABORATIVE PROJECTS?

- ❑ The **budget required** from 2021 to 2030 for the proposed R&I themes and their respective topics is between **19 M€/year** and **31 M€/year**.
- ❑ The **current Research & Innovation budget** from 2021 to 2024 funded by the Horizon EU calls is in average: **11 M€/year**.
- ❑ **There is a lack of investment between 6 M€/year and 20M€/year !**
- ❑ **In 2030 most of topics (>50/75) will not be funded !**
- ❑ **The sector has to find this amount in kind funding.**
- ❑ Collaborative projects can implement projects that will not be funded by the European Commission (innovation proposed by a member, small projects bringing together motivated companies, and R&D projects divided into lots, joint projects with National Research Funds).
- ❑ The collaborative projects have been running for almost 30 years in North America at CEATI. They are profitable and are attracting more and more companies.



CEATI IN CANADA



Generation



Transmission



Distribution



Utilization

12 European companies have joined CEATI They could implement their collaborative projects in ETIP HYDROPOWER



For more information regarding our Programs, Events and Publications, visit www.ceati.com

Why European companies have interests to implement a European CEATI in ETIP HYDROPOWER?

Examples of projects funded at CEATI which could not be funded by EC:

1. Spillway gate function reliability
2. Erosion and Breach processes
3. Non-Destructive Testing of Bar or Cable Anchors
4. Debris management in reservoirs and rivers
5. Multifractals estimates of extreme floods
6. Dam safety performance monitoring and data management
7. Comparison of flood hazard estimation methods for dam safety
8. Landslide generated waves
9. Seismic Hazard and Risk for Dams
10. Grouted post-tensioned anchors assessment
11. Investigating cracked concrete dams

1. CEATI projects are focused on small US utilities
2. Developments and needs are driven by US regulator : the FERC
3. European utilities are looking for projects focused on European regulations
4. This kind of cooperation is a cornerstone for a successful Energy Transition of Hydropower

Current position

- 1) Detailed mapping of existing organisations / associations and their roles
 - This is to ensure complementarity and to avoid any duplication
- 2) Two routes for financing being investigated:
 - Direct membership fees in response to specific service levels
 - Creation of a **new association** etc.
 - The potential to align with existing organisations / associations as an additional supporting service **in the framework of a consortium**, with membership & costs addressed via those organisations / associations
- 3) In parallel, funding from the EU for an additional 2 years of ETIP operation has been sought under a recent Horizon Europe call.
 - Response to proposal expected by early Feb 2026 (latest)
 - Potential funding is at 75% of the current annual budget, and for 2, not 3 years, hence a reduced scope of action – and why finding a sustainable business solution remains very important



Hydropower Day 2026 update

Iraia Nuñez & Anton Schleiss



Funded by
the European Union

www.etip-hydropower.eu

Update Hydropower Day 2026

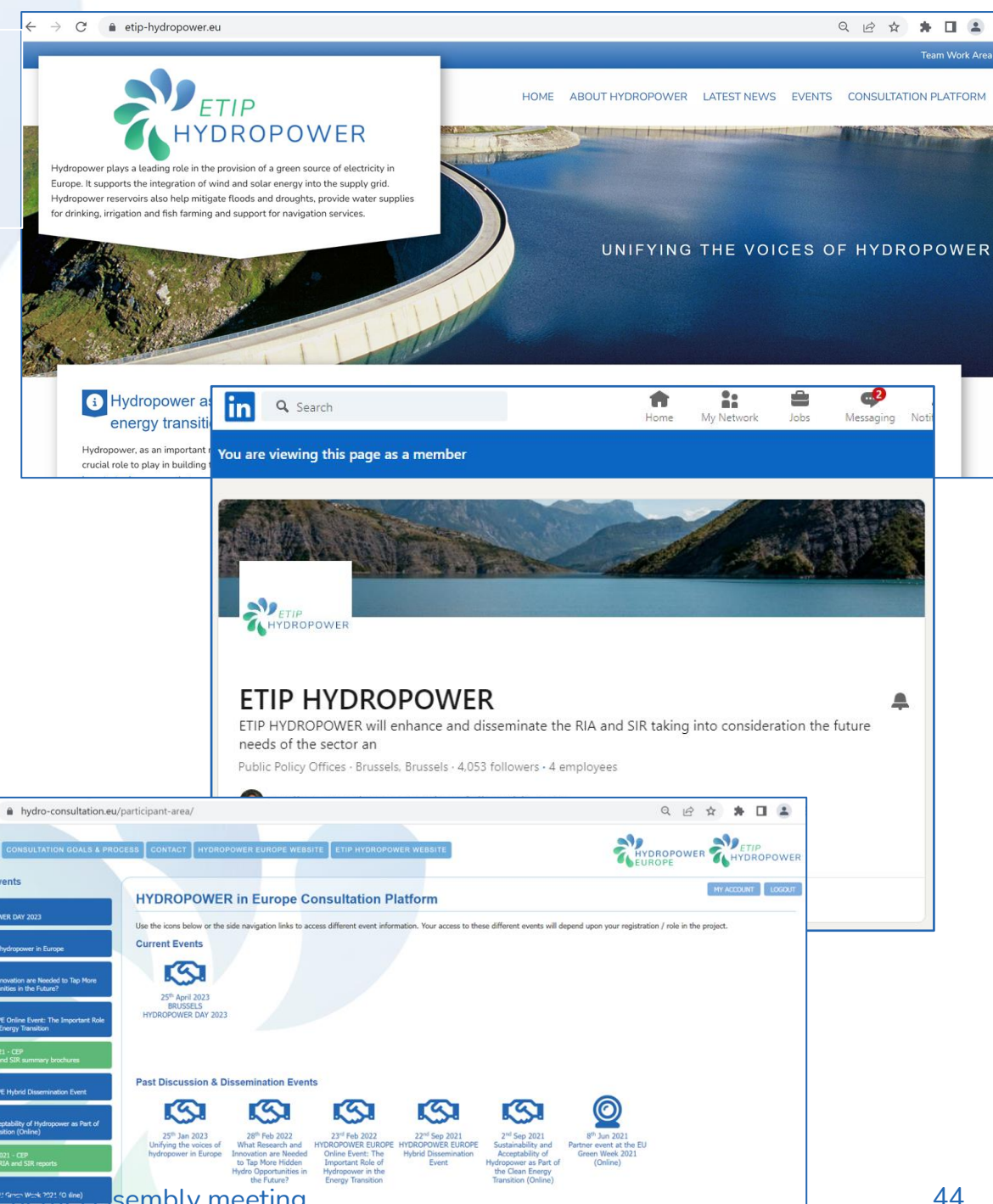
- The event will be held on the **week of the 29th June – 3rd July**
- This time, it will be organized in partnership with **some of the Horizon Europe projects ending in 2026, with the opportunity to showcase its final results on digitalization and modernization.**
- **Topics:**
 - Biodiversity
 - Climate change
 - Grid flexibility
 - Strategic autonomy and security
- Registration opening in January 2026 (Save the date)
- **More news to come:** lottery, evening reception...



AOB & close of the meeting

A reminder that

- We provide information via our website at www.etip-hydropower.eu
- We have active social media accounts such as LinkedIn:
- We undertake consultation and communication events via our consultation platform at <https://hydro-consultation.eu> (currently 1042 consultees/members registered...)



The image displays three overlapping screenshots of digital resources for ETIP HYDROPOWER.

- Top Screenshot:** The ETIP HYDROPOWER website homepage. It features the organization's logo, a navigation menu (HOME, ABOUT HYDROPOWER, LATEST NEWS, EVENTS, CONSULTATION PLATFORM), and a large banner image of a dam with the tagline "UNIFYING THE VOICES OF HYDROPOWER". A text box highlights the role of hydropower in providing a green source of electricity and supporting the integration of wind and solar energy.
- Middle Screenshot:** The LinkedIn profile page for ETIP HYDROPOWER. It shows the company's name, a brief description of its mission, and statistics such as "4,053 followers" and "4 employees".
- Bottom Screenshot:** The "hydro-consultation.eu/participant-area/" page. It lists various consultation events, including "BRUSSELS HYDROPOWER DAY 2023" and "HYDROPOWER EUROPE Online Event: The Important Role of Hydropower in the Energy Transition". It also features a section for "Past Discussion & Dissemination Events".

AOB & close of the meeting

For further information please contact:

secretariat@etip-hydropower.eu

or visit:

www.hydropower-europe.eu

www.etip-hydropower.eu