



TRACER in Wales: Results of the stakeholder consultation on R&I priorities in the Welsh energy sector

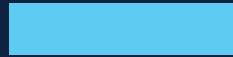
TRACER online meeting

Wednesday, December 1st, 2021



Part 1

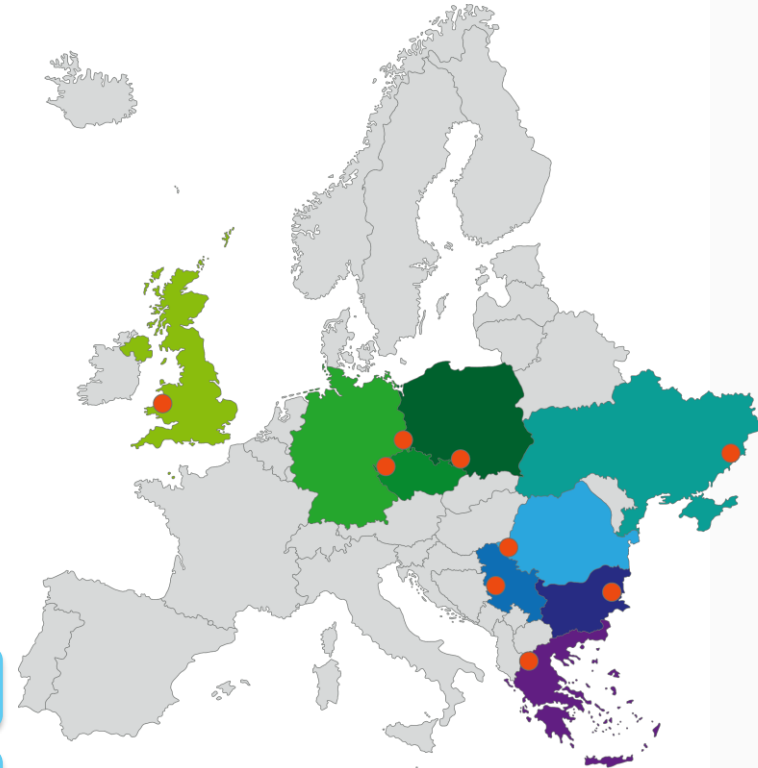
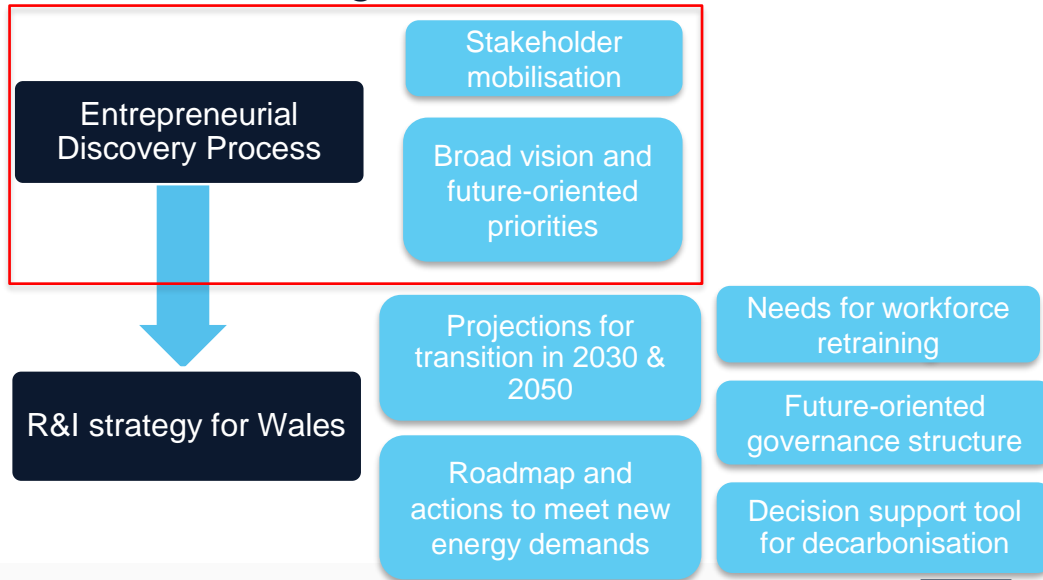
Context & Mobilisation



CONTEXT: THE TRACER PROJECT

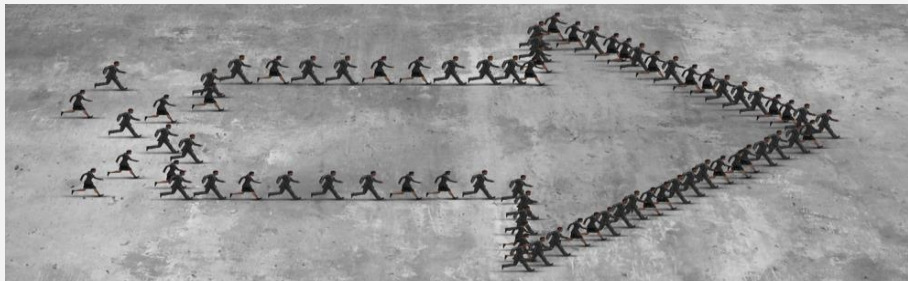
Smart Strategies for the Transition in Coal-intensive Regions

- Innovation policies in Europe mobilised to respond to regional societal and environmental challenges



AIM OF THE CONSULTATION

- **Develop a vision** on the energy transition and an R&I strategy that is shared by a broad range of stakeholders, experts and decision-makers (EDP-approach)
- **Collect their views on:**
 - 1) Perceptions of the existing situation in (parts of) Wales
 - 2) Regional opportunities and challenges
 - 3) What needs to be done (priorities)



CONSULTATION METHODS

Data Collection and Analysis

- **30 interviews** with gov. bodies, third sector, civil society, business and education institutions
- **This workshop** to sense-check the first results & identify priorities
- **Close collaboration** with Welsh government & TRACER partners (e.g. interview design)
- COVID impact on fieldwork



“THERE IS A FUNDAMENTAL STRUCTURAL SHIFT IN THE COMMITMENT BY THE WELSH AND UK GOVERNMENTS TO MOVE TOWARD A NET ZERO CARBON FUTURE IN 2030.”

Part 2

Fieldwork results



PERCEPTIONS OF THE COAL TRANSITION

A tale of two transitions

Identification of two transitions with separate temporal, geographical and cross sectoral incidence

Transition
out of coal

Transition to
renewable
energy sources

They differ in terms of technologies, R&I needs, policy context and territorial incidence.

“THE ENERGY TRANSITION HAS BEEN FAIRLY SUCCESSFUL, WHEREAS THE TRANSITION AWAY FROM COAL HAS HAD EXTENSIVE LOCALISED EFFECTS.”

STAKEHOLDERS' PERCEPTIONS OF THE TRANSITION

Regional Strengths

- Natural resources favourable for renewables, tourism & green industries
- Existing value chains with repurposing potential
- R&I and renewable energy clusters and collaborative networks with net-zero commitment

Regional Challenges

- High demand for heat
- Capacity of electricity and gas grids, and (public) transport networks
- Long-term deprivation in coal mining communities
- Skills mismatch (incl. in other sectors)
- Managing the costs of renewable technologies

EXAMPLES OF FUTURE VISIONS



	Areas of Need	Areas of Opportunity
Political, regulatory & financial incentive frameworks	<ul style="list-style-type: none"> • Mapping of energy needs and R&D in Wales • Align Welsh needs with UK and potentially other funding and development sources 	<ul style="list-style-type: none"> • Public procurement & seed funding • Local leadership (e.g. city-region deals)
Infrastructural & sectoral investments	<ul style="list-style-type: none"> • Improving public transport • Investment in energy storage 	<ul style="list-style-type: none"> • Retrofitting houses & building design • Mix of renewables
Labour market, skills & community support	<ul style="list-style-type: none"> • Public ownership of energy transition • Identify locational dynamics (e.g. job & residence location) 	<ul style="list-style-type: none"> • Create and/or promote “centres of excellence” in energy • Community energy projects

Part 3

Where next?



CONCLUSIONS & NEXT STEPS

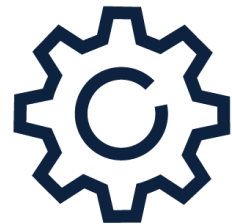
- **Wales has important strengths:**
 - research expertise
 - industrial bases
 - internal and external linkages
 - collaborative networks



- Interviewees' visions highlight the need for **political leadership and collective effort** in the just transition. Recognising mistakes of the past is necessary to seize present and future opportunities
- A sustainable energy transition faces significant infrastructure and technological barriers. A **shift in policy focus** is needed to address governance, unequal access and societal involvement

CONCLUSIONS & NEXT STEPS

- A **just** energy transition: what does this mean to the affected communities?
- Move from “narrative of victimhood and dependence” to **agents of change**
- Industries and sub-regions have different transition pathways
→ **place-based approach**
- New developments and policy changes
 - Post-Brexit and post-COVID
 - New Welsh Government Policy initiatives
- Inform next phases of **TRACER**
 - R&I strategies for energy and environment
 - Skills for the energy transition



Thank you!

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