

Minutes
European Solar Thermal Industry Federation aisbl
General Assembly

Friday 1 December 2017, 09.30 – 13.00

**Press Club Europe, Rue Froissart 95,
1040 Brussels, Belgium**

FINAL AGENDA

Opening

1. Welcome and approval of agenda
2. Approval of minutes of the 2 December 2016 General Assembly

Reports

3. Approval of final 2016 accounts
4. Policy developments in 2017
5. Activity report 2017 & provisional 2017 accounts

Rebranding

6. Presentation on rebranding
7. Statutory issues: Approving the change of name of European Solar Thermal Industry Federation (ESTIF) into Solar Heat Europe-European Solar Thermal Industry Federation (Solar Heat Europe/ESTIF)

Priorities and budget

8. Priorities for 2018 & approval of 2018 budget

Solar thermal market development

9. Market development: update and discussion

General Assembly Closing

10. Date of the next Ordinary General Assembly
11. Any other Business
12. Closing

LIST OF PARTICIPANTS

ASSOCIATIONS

ATTB/ Belsolar
BDH
BSW
EBHE
ENERPLAN
Holland Solar
Swissolar

WimPersoons (WP)
Lothar Breidenbach (LB)
Manuel Battaglia (MB)
Costas Travasaros (CT)
Mathilde Emery (ME)
Marcel Cloosterman (MC)
David Stickelberger (DS)

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Stephan Fintelmann (SF)
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Isabel Pfeil (IP)
Kaj Pischow (KP)
Robin Welling (RW)

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DELEGATION OF VOTE (PROXIS)

Austria Solar
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GUESTS

ASIT
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Pascual Polo (PP)
Panagiotis Kenterlis (PK)
Thessalia Frantzi (TS)
Gerard van Amerongen (GvA)

ESTIF Staff

Geoffroy Cazenave (GC)
Pedro Dias (PD)
Stefano Lambertuci (SL)

ABBREVIATIONS USED

BoD – Board of Directors; **CEN** – European Committee for Standardisation; **CEP** - Clean Energy Package; **CSP** – Concentrated Solar Power; **DH** - district heating; **EC** – European Commission; **EE** - Energy Efficiency; **EED** - Energy Efficiency Directive; **EP** – European Parliament; **EPBD** - Energy Performance of Buildings Directive; **EPC** - Energy Performance Certificates; **ERP** – Energy Related Products regulations (Energy labelling and Ecodesign); **ESTESC** - European Solar Thermal Standards and Certification Working Group; **ESTTP** - European Solar Thermal Technology Panel; **GA** – General Assembly; **H&C** - Heating and Cooling; **IEA-SHC** – IEA Solar Heating and Cooling Programme; **RES** – Renewable Energy Sources; **RES-E** – RES Electricity; **RHC (or RES-H&C)** - Renewable Heating and Cooling; **RHC-ETIP** - European Technology and Innovation Platform on Renewable Heating & Cooling; **SKN** - Solar Keymark Network; **ST** – Solar thermal; **TC** – Technical Committee.

1. Welcome and approval of agenda

The President, Robin Welling, welcomed the members to the General Assembly. He referred that it was a pleasure to meet again the members and to have the opportunity to discuss about the sector, as it was done in the events of the previous day and as it would be done in the event taking place after the GA. He explained that the General Assembly was concentrated in the morning period only, so that such events comprising interesting debates with external speakers would be possible.

RW mentioned the relevance of meeting and discussing the sector knowing the current situation of the market. He also expressed his opinion that new approaches, such as the rebranding of ESTIF, being voted at the GA, signal also changes for the sector.

2. Approval of minutes of the 2 December 2016 General Assembly

Pedro Dias asked the members if there were any comments to the minutes of the previous General Assembly. There weren't any comments. The minutes were ratified unanimously.

3. Approval of final 2016 accounts

The Secretary General, Pedro Dias (PD) presented the 2016 accounts. He reminded the members that, as this was the only GA of the year, the accounts being presented referred to the previous year, 2016. PD pointed out that the documents distributed previous to the meeting and that are relevant for the approval of the accounts are the Balance Sheet, the Profit & Loss Accounts and the overview of payables & receivables (clients & suppliers).

PD reminded that the expectation for the year was to achieve a balanced budget. He highlighted that the results were better than budgeted, with a positive result of EUR 9478, about seven thousand Euros better than budgeted. Furthermore, the total reserves would reach almost 230 thousand euros (€229 462.11).

The positive result was possible in spite of a drop on income coming from membership fees, as a result of exceptional incomes and a strong reduction on operating costs, mainly in staff costs. He noted that the accounts included a provision for doubtful debts related to unpaid membership fees, which totalled €10 880.

He pointed out that the rate of coverage of running costs was 84% in 2016. This is well below the target and indicates the needs for adjustments.

PD opened the floor for questions or comments. There was a question regarding the open debts related to membership fees, which was promptly answered.

Then, the 2016 accounts were put forward for vote and were approved by unanimity.

4. Policy developments in 2017

This point started with a presentation on policy, by Stefano Lambertucci (SL), focusing on the policy developments during 2017.

SL referred that the main policy developments are linked to the Clean Energy Package (CEP) for all Europeans, though several other issues have been followed in parallel, such as the debate on the electrification and the review of the Energy Labelling Directive.

He pointed out that, overall, the overarching targets of the CEP are positive at this stage, with the EU Parliament voting an increase in the ambition for both the renewable and energy efficiency targets, and a solid governance framework. The most relevant elements of the CEP have thus been presented.

On the RES Directive, the main achievement is a new measure to streamline deployment of RHC, aiming at a 2pp increase yearly up to 2030. Additional wins are the reinforcement of the minimum levels of RES in new/renovated buildings, the provision of information on RES alternatives while replacing boilers, and other measures to promote DH greening. On the Energy Performance of Buildings Directive, the main achievements have been stronger rules for building renovation strategies, reinforcing the role of Energy Performance Certificates, while avoiding excessive administrative burdens, improving the proposal on inspections of heating systems. Finally, on the Energy Efficiency Directive, main wins are the eligibility of savings from RHC installations in Energy Efficiency Obligations and, limiting the scope of the revision of the primary energy factor, which would have benefited mostly electric devices.

Another important development for 2017 has been the debate on the electrification of H&C, where Solar Heat Europe/ESTIF published two joint papers with other RHC associations, which have been key in promoting our views, mainstreaming the concept of 'wild' electrification in the debate, building broad coalitions of stakeholders and reaching policy makers, with some very concrete results at the end of the year.

The third big development of the year has been the revision of the framework for energy labelling, which most notably contained the rescaling and the creation of a EU database. There, successes have been obtained in safeguarding the industry positions, by delaying the rescaling for heating products. There, important synergies with the Solar Heat Europe led Labelpack A+ project have been exploited.

Finally, Solar Heat Europe also dealt with specific issues from a policy perspective, such as financing for RHC, promoting synergies with the tools deployed for the energy efficiency sector, or the review of the Energy Statistics regulation, where a clarification of the distinction between solar thermal and CSP has been promoted.

KT asked for Solar Heat Europe/ESTIF to support EBHE more on the issue of gas subsidies in the Greek market, regretting the limited involvement of the association on this national issue. Solar Heat Europe/ESTIF could create material to support the national association and create alliances to tackle the issue. PD answered that on one side, there is no legal ground to contrast the Greek government decision, on the other, Solar Heat Europe/ESTIF did some action where it could, such as on the support for gas boilers in EED. Anyway, in future Solar Heat Europe/ESTIF might be looking more into national issues such as this one, as discussed under 2018 priorities.

NC asked clarifications on the EU statistics. SL clarified that this was on clarifying the different role of ST and CSP on EU regulation, which is a different matter from the issue of Eurostat rules on debt accounting of Energy Performance Contracting.

JK asked what would be the impact of the electrification of the heating by 2030. SL replied that it has been defined as a major competition agent for the ST sector, as it also emerged clearly from the workshops on 30 November. RWV added that it is difficult to quantify how it will impact the industry, but under certain perspectives could also be an opportunity for ST, as RES-E could leave a gap that ST could fill. NC added that this debate could also have the positive effect of limiting electricity to high-temperature industrial needs, leaving low-temperature domestic needs to ST. PD added that while there is a clear trend in favour of electrification, there is now more awareness on its limitations, and on alternatives such as ST.

5. Activity report 2017 & provisional 2017 accounts

a. Activity Report 2017

Pedro Dias presented the activity report for the year 2017. He started pointing out what the main priorities, namely within the main area Policy, Labelling and Membership.

In terms of Policy, one of the main points was the positioning solar thermal in the 2050 EU energy mix. From this debate, involving the ESTIF BoD and experts, one of the main outcomes was the need to promote thermal storage and smart thermal grid as critical concepts, that will enable more solar thermal in the future. These concepts need to overflow to other sectors, including those that are also competing with solar thermal, in order to bring a faster deployment of such solutions into the market, which at the end will be beneficial for solar thermal. This reflection was done in parallel with the work on the White Paper on Solar Heating and Cooling, being complementary.

Pedro Dias referred also the relevance of the work aiming at achieving a good framework for solar thermal in the 2030 legislative review, one of the main priorities. This work concentrated a relevant part of the efforts of the team, mainly on policy, from SL but also the rest of the team. PD stressed the event organised in cooperation with ECI, on renewable heating and cooling and with extremely relevant speakers from EP, EC and Estonian Presidency. On this topic and also on another important priority regarding the positioning of solar thermal in the electrification of heating sector debate and the path towards the 2020 target, PD complemented the previous presentation, where SL addressed results, with an overview of what it implied in terms of work.

Regarding the Energy Labelling priority area, PD provided an assessment of the work done in the promotion of a better roll-out of the package label in the market and in the quest for an improved framework for solar heating and cooling. This involved assessing the implementation in main markets, regular interaction with institutions and relevant associations, following the review of the Energy Labelling overall framework. A particular focus was placed on concrete topics related to thermosiphons; collector label and the labelling framework. This work was mainly done in the framework of ESTESC, Labelpack A+ and SKN. In fact, one of the main issues related to stimulating synergies regarding labelling requirements between ERP and Solar Keymark, which included development and improvement of free to use tools.

PD referred that regarding the third main priority area, membership, the main highlights should be given to the rebranding process but also to the new website, launched mid-year. This was an important development that provides new capabilities, relevant for the secretariat but also for the users and projects a new image of the organisation. PD pointed out some of the novelties that were developed for the benefit of the members. Regarding the extension of the ESTIF support base, PD referred that the results were not positive, as it didn't result in a large increase in terms of membership and the approach to this work shall have to be done in a different way.

He also provided an overview of the work done in other areas, such as the Research & Innovation, namely the ESTTP and the RHC-ETIP. This work included proposals for H2020, monitoring relevant projects for solar thermal, among other aspects. PD continued referring the work done in relation to the Solar Keymark and Solar Certification Fund, on the administration aspect but also in a broader way, in what concerns the strategy for SKN and communication and promotion of the scheme.

The floor was opened for questions. There was only a question on plans regarding the work on thermal storage. PD proposed to address the topic when discussing the priorities for 2018.

b. Provisional 2017 accounts

The ESTIF Secretary General presented an update of the 2017 accounts. He pointed out that this point was only for information. PD referred the expectations were to reach a

neutral budget, with a limited positive or negative result. He clarified that to a large extent, the execution would depend on the capacity to collect the pending membership fees. Answering a request, PD referred which where the members with an outstanding membership fee for 2017. There were no questions from the floor and the point was closed.

6. Presentation on rebranding

Geoffroy Cazenave, ESTIF's Communication Manager, provided an update on the rebranding process, which included the change of the logo, a new corporate image, a new website and the promotion work. He pointed out that this work was done in-house, as this was one of the requirements defined by the Board of Directors, taking into account comments from members in the preceding discussions. GC provided an overview of the work done, also in relation to the general communications work and also on the political communication. He stressed the work done on the development of services for members, improving the current ones, such as the newsletter and the briefing service but also developing new ones, such as the business opportunities section or monitoring members in the media.

GC provided some information on activities focused on political communication, on awareness raising and providing increased visibility to the sector. Some examples included the Decarb Europe campaign, lead by ECI and involving several RES and EE solutions or the #RenEUable campaign with other RES associations.

Costas Travasaros, from EBHE, requested that some of the services are open to their own members. Robin Welling referred that it was important to distinguish also for manufacturers that there was an additional value of being directly member of Solar Heat Europe/ESTIF. GC and PD complemented that the plan was to become more attractive to other companies, in order to motivate them to become directly members. RW referred that Solar Heat Europe/ESTIF would always be open to organise joint actions with national associations addressing their members, supporting the work of the associations but without giving them the same benefits as for existing members.

7. Statutory issues: Approving the change of name of European Solar Thermal Industry Federation (ESTIF) into Solar Heat Europe-European Solar Thermal Industry Federation (Solar Heat Europe/ESTIF)

Pedro Dias provided a short overview of the process and explained what the proposed changes were. He highlighted that it was decided to combine the new and the old name, for marketing reasons, as ESTIF was a well established name in Brussels and in the sector but also for practical reasons, regarding for instance existing contracts or relations with suppliers. There will be eventually in the future the conclusion of the process by changing the name to Solar Heat Europe only.

He clarified that the current decision regards the change of the official name of the association, by approving a change to the relevant article (Art. 1) in the statutes. PD pointed out that the statutory deadlines had been respected and that the change required a simple majority of votes.

He then proceeded for a new confirmation of the quorum. He informed that there were forty-nine votes present or represented, 51% of the total votes and 58% of the valid votes (i.e., of the members that have paid their membership fee).

JK mentioned that he supported the change, though he'd like to understand the main motivation for the change. PD and RW provided an overview of the process, from the initial discussions related to the name change of partner associations at European level to the discussion with members in the 2015 General Assembly. RW stressed that the Board of Directors debated the topic and considered that this was the right time to propose the change.

The President of the Board opened the vote on the proposed statutory changes comprising the name change. The proposed changes to the statutes were voted and approved. There were zero votes against, there was one abstention (one vote) and forty-eight votes in favour.

8. Priorities for 2018 & approval of 2018 budget

Priorities 2018

PD presented the priorities for 2018, under the motto of “Building up our strengths”, within an overarching goal of “Position solar heating and cooling in the future European energy mix”. The priorities were mainly divided in three main areas: Membership & organisation; Policy Framework; Industry’s competitiveness.

PD explained that “Membership & organisation” was presented in first place as this area had to increase in priority and time allocation in terms of the internal work, as there is a strong need to increase membership and engage current members. This work includes also actions related to the increase of Solar Heat Europe/ESTIF’s and the sector’s visibility and improving services provided to its members.

The next main work area was linked to the policy framework. This ongoing priority will have a particular focus on the work with the national level, be it with a medium term (2030) approach or addressing short term (2020) results. It involves some emphasis on the cooperation with members in addressing the Clean Energy Package implementation at national level, on promoting the deployment of incentives for solar heat at national level focused on the 2020 targets. It also includes actions to explore opportunities for

improved financing mechanisms addressing solar heat, developing position papers on the expansion of solar heat market segments.

The third priority area would address “Industry’s competitiveness”. This area is cross cutting to SHE work and will include actions to strengthen the message on the relevance of thermal storage and also having a stronger focus on concrete needs and challenges for specific solar heating and cooling market segments, be it residential, solar district heating or solar heat for industrial processes.

PD also presented some of the proposals regarding other work areas, such as Solar Keymark Network; RHC-Platform & ESTTP, Labelpack A+ and project acquisition, as well as events in cooperation with other trade associations, within solar or renewable heating and cooling. He also pointed out foreseen activities related to policy and advocacy, media and communication or market intelligence.

In this regard, it is planned to set up working groups on “Market” (including market intelligence and marketing aspects) and on “Policy”. Likewise, task-forces would address topics more specifically related to Solar Heat for Industrial Processes; Solar District Heating and Solar Heat in Buildings.

MC stressed the relevance of the work in relation to thermal storage and its relevance for solar thermal and the energy system. PD agreed, referring as example the strategy adopted in the association for highlighting the thermal storage potential and its role. Such work will continue in 2018. Furthermore, MC questioned if the overall approach would not lead to solar thermal being overshadowed by other technologies. PD commented that policy approach addresses different solutions, not technologies in specific, and our approach as sector needs to be adapted to such reality. Regarding the need for better market data, MC questioned if Solar Heat Europe/ESTIF could provide a blueprint for this work at national level. PD stressed that it should be the result of a sharing of experiences that could also be done in the scope of the Market Working Group.

CT mentioned the importance of addressing export markets and that it would be important for Solar Heat Europe/ESTIF to play a bigger role. As an example, he wanted to see the association providing a stronger support to Global Certification and to explore opportunities for European exports. RW referred some of the initiatives from the association, though he stressed the limited engagement of European industry, giving the example of SHC conference. PD referred that the association is engaged on work regarding the competitiveness of the European renewable’s industry, namely bringing to the floor the relevance of the focus on SMEs and the internal market.

NC pointed out the relevance of the discussion of financing. In concrete regarding the topic of de-risking, as debated the previous day, he referred the importance of collecting more information and data, to add to the existing data, for instance in the website Solar Thermal World.

CT also mentioned that it was important to address the questions related to standards and to the work within CEN TC312. In particular he referred the shared concerns that standards were not developed in a friendly manner to manufacturer, which are mainly SMEs. As such, he called for Solar Heat Europe/ESTIF to cooperate with CEN TC312 in such discussion and in the joint organisation of a workshop, if possible with financing from SCF. RW asked for this to be discussed after the discussion on the budget.

Budget 2018

PD presented the budget proposal for 2018. He pointed out that it was a negative budget, totalling EUR 24 945. This imbalance was resulting from the need to keep running costs at the current level, while there was a continued reduction on incomes, both from membership fees and from projects.

It is proposed to maintain the current level of running costs, as additional cuts would affect the current staff, which is considered essential for the organisation to have a relevant role and some impact. He showed a graph illustrating the evolution of costs and incomes over the years and how running costs have already been reduced. He pointed out that 2018 is seen as a year to capitalise on some of the work done on communication and other areas, in order to increase the number of member and other options, for instance, cooperating with projects in terms of communication work.

There were no questions from the floor on the budget proposal.

CT recalled his proposal for an event with CEN TC312, exploring the options for SCF support, not to burden Solar Heat Europe/ESTIF budget. This point was agreed and shall be followed up by the Secretariat.

PD opened the vote on the budget for 2018. The budget was unanimously approved.

9. Market development: update and discussion

PD provided an overview of the situation regarding the different markets, based on the information collected from national solar trade associations. For 2017 and 2018 there are three markets presenting interesting numbers: Greece, Spain and Netherlands. Portugal is expected to be stable in both years. Poland is expected to be very negative this year but with more positive prospects for 2018. Germany, France, Austria and Switzerland are expected to be rather negative both years, in 2017 and 2018.

The situation per country was presented and, in most cases, discussed.

Note: a more detailed report on the market based on this session is available for the members.

There were some concerns voiced regarding the criteria used for public tenders in Poland. It was referred that this question of the tenders and the criteria to be used in order to promote clear and transparent procedures, should be discussed, also in the context of SKN, in order to provide public authorities some guidance.

10. Date of the next Ordinary General Assembly

Pedro Dias presented the proposal from the Board of Directors to hold the next General Assembly on the 30th November 2018. On the 29th November there will be different meetings or workshops and the official dinner. The location is not confirmed yet, as it is possible for members to send proposals regarding the hosting of the meeting.

The members approved the proposal to hold the 2018 General Assembly on the 30th November 2018.

11. Any Other Business

No points were addressed.

12. Closing

Robin Welling thanked the Secretariat for the organisation and the members for their participation. RW considered it was a very positive General Assembly, with the change of name confirmed and with very constructive discussions. He invited the members to remain for the debate organised in the afternoon.

He then closed the meeting.

*Minutes approved by the Solar Heat Europe/ESTIF Board of Directors,
at their meeting of 5 February 2018.*