



European
Solar
Thermal
Industry
Federation

ACTIVITY REPORT 2016

ESTIF
European Solar Thermal Industry Federation

*Challenging answers for a challenging
context*

Version 1.2
November 2016



SUMMARY

We have summarised the objectives for 2014 as **“Resetting for new challenges”**. This was clearly a transition year. We had to adapt ESTIF for the challenges ahead, while still delivering to our industry over the duration of the year. This meant changing the wheels of a moving car. Looking back we believe we have achieved to a large extent the objectives of the year. We have taken important steps in creating a positive framework to be explored in the coming years. Obviously more needs to be done.

For 2015, the focus was on **“Coming out of the starting blocks”**. This was based on the perception that ESTIF, on behalf of the sector, was on a race to make things right for our industry. This included the need to push for concrete policies addressing renewable heating and cooling and in preparing for the important milestone in September 2015, with the regulations on energy labelling affecting space heaters (Lot1) and water heaters (Lot2) coming into effect. Internally ESTIF needed to rebuild competencies within its staff, after all the changes in the preceding period.

In 2016, we were looking for **“Challenging answers for a challenging context”**. The energy system is changing very fast and this change is creating disruption. This affects all sectors, from electricity to heat, from centralised generation to self-consumption, from renewables to fossil fuels. As a sector we needed (and still need) to find adequate answers for these new challenges. Internally we needed to find new ways of reaching out to the sector, of attracting new members and interact better with our members.

Summarising the year, it was a very intense and interesting year in terms of policy work. The launch in February of the European Heating and Cooling Strategy shed some light into what were the measures ahead that could support the uptake of RES-H&C and solar thermal in the short term (2020) and medium term (2030). This debate helped to open a “Pandora box”, the ‘electrification of heating’. This topic grew in relevance for our work, were we tried to promote the concept of sensible or efficient electrification rather than other options that would just aim at dumping electricity into the heating sector, generating a strong increase in market demand. Finally we had to dedicate a lot of our efforts into the consultation processes regarding the review of several important legislative pieces for our sector: the Energy Efficiency Directive (EED), the Energy Performance of Buildings Directive (EPBD) and the Renewables Directive (RES-D).

In terms of energy labelling, ESTIF continued the work from the previous year, namely in the framework of the Labelpack A+ project, developing tools for the calculation of the package



label, preparing information and training materials and following the implementation in the market. ESTIF also supported the work in the framework of SKN and its synergies with energy labelling, including on the debate on the strategies for the development of SKN.

With regard to membership, we are glad with the improvements done in our main communication tools. Following the inputs from members at the last General Assembly, we have revised the Members Briefing Service and the Solar Heat News. This was done in spite of the internal limitations, in terms of human resources, regarding the communication area for most of the year. The membership recruitment campaign did not work. ESTIF has two new members but lost other members. In the meantime, there is also an effort to improve the perception of the value of ESTIF membership. One of the examples is the Extended market report for members only, with a short summary made available. This process had suffered several delays but shall set a new stage in terms of market reports in ESTIF.

In this report we will summarise the main achievements of the year and also the shortcomings. It was intended to keep this document short. Still, as always, the ESTIF Secretariat is available to provide additional clarifications to its members on any of the points addressed below or other.

2016 PRIORITIES

Policy

- Achieve a good framework for solar heating & cooling
 - Explore positive aspects of EC Heating & cooling strategy
 - Strive for legal frameworks reflecting appropriately solar heating & cooling needs (RES-D, EPBD, EED)
 - Advocate for enabling measures for renewable heating and cooling: financing tools, support schemes, consumer awareness, qualified installers
 - Promote an adequate 2030 governance framework for heating & cooling
- Increase political awareness and visibility for solar heating and cooling
 - Carry out both joint and individual actions addressing policy makers (EC, EP, MS)
 - Develop stable cooperation frameworks with relevant stakeholders
 - Increase cooperation and coordination with national trade associations

Energy Labelling

- Support the good roll-out of the package label in market
 - Development and improvement of adequate tools



- Promote capacity building at national level
- Monitor implementation in main markets
- Work on an improved framework for solar heating and cooling
 - Feedback on implementation to institutions
 - Contribute to a positive framework on overall labelling
 - Stimulate synergies between ERP, SK, CE marking
 - Coordinate sector preparation for regulation (Lot 1 & Lot 2) review

Membership

- Improving the services provided by ESTIF to its members
 - Improve information tools, with varied options in terms of scope and timing;
 - Promote stronger Member's involvement in different areas of work;
 - Increase visibility of sector and members.
- Extend ESTIF membership base
 - Improve membership value proposition;
 - Extend networking to reach to potential members;
 - Improve visibility of ESTIF work and actions

OVERVIEW OF WORK PER AREA

Policy

- Following up on the European heating and cooling strategy
 - Document launched by EC in February 2016
 - Some follow up work on the strategy, in relation to measures towards 2020, namely financing of investments in RES
 - Internal discussion with ESTIF members on measures to promote ST
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- Active contribution to the ongoing legislative review: RES-D, EPBD, EED, governance
 - Participation in all steps of the consultations process
 - Targeted proposals, based on previous and newly developed positions
 - Interaction with members, launching several consultations
 - Cooperation with different associations, with joint positions and joint actions
- Monitoring and lighter contribution to other topics relevant topics



- Keeping track of potentially relevant topics, for the sector as a whole or for specific areas
- Interaction with members, either with information or feedback
- Cooperation with other associations, supporting their efforts in issues of relevance where there were common positions (eg: energy labelling)
- Monitoring main topics at national level and cooperating with members when needed
 - Contribution to a joint evaluation on support schemes (FROnT project)
 - Consulting national associations on national implementation of European regulations
 - Cooperation with national associations on specific national policy issues (ex.: STA on RHI evaluation)
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- Developing a more strategic approach on policy
 - Working on strategic policy priorities with RES-HC associations (FROnT)
 - Streamlining policy proposals taking into account different dimensions: short/long term; combining EE and RES-HC, ...
 - Partnering for the development of a White Paper on Solar Heating and Cooling
- Addressing challenges posed by the discussion on electrification of heating
 - Active contribution on the PEF debate
 - Raising awareness about the risks of wild electrification
 - Establishing broader partnerships

Shortcomings on Policy

- Political awareness and visibility for solar heating and cooling
 - Contacts with EC and EP harder than expected
 - RES-HC overshadowed by RES-E and EE
 - Need for “catchier” messages and support elements (data, infographic, etc.)
 - More time needs to be allocated to “corridor” work
 - More work needs to be done to reach out to Member States (both representations in Brussels, and national governments)

Energy Labelling

- Support to the implementation of the package label, though not as much as expected/planned
 - Development and improvement of tools (LPA+)



- Promoting capacity building at national level (LPA+)
- Assessing implementation in main markets (LPA+)
- Work done on an improved framework within Energy Labelling for SHC
 - Contact with institutions and relevant associations
 - Promote discussion on synergies between ERP and Solar Keymark
 - Following the Energy Labelling (overall framework) review in cooperation with EHI
 - Kick-starting some initiatives related to expert work on labelling related topics

Shortcomings on Energy Labelling

- Limited action on several relevant topics
 - Difficulty to engage stakeholders, namely from industry
 - Limited availability from “usual” committed experts
 - ESTESC activities frozen

Membership

- Improvement of services provided to ESTIF members
 - Improve information tools, with varied options in terms of scope and timing;
 - Opening room for more interaction, namely on consultations on relevant topics
 - First efforts to increase members’ visibility (market statistics, factsheets)
 - New initiatives to increase perception of membership value, including additional “Members-only” services

Shortcomings on Membership

- Extending ESTIF membership base
 - Membership recruitment campaign not successful
 - Limited results in networking and improving visibility of ESTIF work and actions

Other areas

Achievements

- Achieving visibility through project activities and outcomes for ESTIF and solar thermal at the national and EU level
- Developing important resources for the renewable heating and cooling sector, and namely solar thermal, via several activities in the framework of European projects:



- FROnT LCoHC calculation tool, LabelPack A+ package label online calculation tool,
- Promoting awareness on RES-H&C with policy makers and other relevant stakeholders
 - FROnT high level conferences, materials and communication campaigns
- Management and coordination of IEE, H2020 projects and SCF (Solar Certification Fund) management
 - call for proposals, contracting, reporting, evaluation, coordination of Steering Group, etc.
- Promotion of standards and certification through providing secretarial support to SKN, SCF and coordinating subgroup of ESTESC
- Promotion of Research & Innovation in solar heating and cooling, including support to ESTTP, cooperation with regard to Horizon 2020 and SET-Plan
 - Coordinate contribution to consultations, engage ESTTP contributions, updating the Solar Thermal Roadmap, organization of several workshops, meetings and webinars throughout the year
- Monitor RHC development via coordinating the ESTTP, participating at RHC-Platform and implementing the RHC tender.
- Improved communication tools addressing members
 - New Membership Briefing Service and Solar Heat News

Shortcomings

- Decreasing participation at the ESTTP, few contributions to consultations: lack of motivation of experts not addressed successfully;
- No successful project acquisition
- Old and hard to operate website
- Limited action in terms of external communication for ESTIF, SKN, ESTTP.