

ACTIVITY REPORT 2018

Solar Heat Europe/ESTIF

Building up our strengths

Version 1.1
November 2018

SUMMARY

We believe that 2018 was an important year for our sector. The opportunities that have been opened by the Clean Energy Package and the prospects for new market segments are reasons to be optimistic in the future of our sector and to remember 2018.

It was proposed that in 2018 the focus would be on **“Building up our strengths”**. One of our many strengths is the untapped potential of our technology, namely in developing market segments, such as Solar District Heating and Solar Heat for Industrial Processes.

During this year, Solar Heat Europe started a process of addressing more directly the needs of such market segments, as well as the largest one, Buildings. This focused approach allowed to identify more clearly the specific needs of each segment and to pinpoint the main actions that should to be taken with the involvement of Solar Heat Europe.

Also in 2018, we have relevant studies confirm that solar heating and cooling as an important role to play, even stating that it can cover 3 to 6% of renewable heating and cooling in Europe by 2030, as expressed in a report of IRENA in cooperation with the European Commission.

Besides our policy work, we have also built on our strengths in terms of communication work, with more exposure in social media and media outlets, giving notoriety to our organisation and our sector.

The negative note on the year was related to the recruitment campaign, where the results were below expectation. This is an aspect where additional work is needed, namely gaining visibility to Solar Heat Europe’s achievements and potential, considering a more focused approach to the needs of the different segments.

Internally, we have met the inevitability of changes within our staff, using it as an opportunity to redefine some of the work done within the Secretariat. While having such changes leads inevitably to a loss of experience and knowledge, it also brings new ideas, new approaches that can be beneficial to our work.

We believe to have largely covered the priorities that had been set for this year. Over the next pages, we provide a summarized overview of the work done under the main priorities defined for the year. As usual, we have closed some processes that have led to new challenges, while we continue to address ongoing ones.

And 2018 has brought some new and interesting challenges for our sector, that we shall strive to address, in cooperation with our members.

PRIORITIES 2018

Membership & organisation

- Recruiting new members for Solar Heat Europe
- Increase Solar Heat Europe's and the sector's notoriety
- Improving services provided by Solar Heat Europe to its members
- Enhance member's engagement

Policy framework

- Cooperate with the members in addressing the Clean Energy Package implementation at national level
- Promote measures at national level to bridge the gap on 2020 targets for solar heat
- Explore opportunities for improved financing mechanisms addressing solar heat
- Develop position papers on the expansion of solar heat market segments

Industry's competitiveness

- Promote storage solutions and smart thermal grids as central to the future energy system
- Gather and promote essential information on solar heat projects, best practices and LCoH
- Promote a better framework for solar heat in the package label

OVERVIEW OF WORK PER AREA

Membership & organisation

Membership & Organisation

- **Recruiting new members for Solar Heat Europe**
 - Recruitment campaign below expectations: three new members recruited; over one hundred organisations reached;
 - Retention of members & member's engagement: four resignations in 2018; improvements in Member's area and several opportunities for member engagement, with limited response;
 - Work with new partners to enhance the visibility of Solar Heat Europe in order to recruit new members: CEN TC312, EuroHeat & Power, RHC-ETIP.

- **Increase Solar Heat Europe's and the sector's notoriety**
 - Solar Heat Europe has been involved in main events for the sector: Eurosun, ISEC, SDH conference, EHI conference on Buildings, EC High Level Event on Decarbonisation of Heating & Cooling;
 - Several partnerships with other organisations on heating & cooling thematics: CoolingEU, DecarbHeat, DearbEurope, Higher Ambition Coalition and other.
 - Different communications campaigns were designed and implemented along the year: #NoWildElectrification, #CheckYourHeating, DecarbEurope and other policy relates actions;
 - Transforming Solar Heat News into an open publication, with some restricted content, distributed to hundreds of subscribers;
 - Almost 50 articles were published this year referencing Solar Heat Europe and its work in the press.

- **Improving services provided by Solar Heat Europe to its members**
 - Improving security of Member's Area, allowing also for better monitoring and new services;
 - Enhancement of the business opportunities section in the website;
 - Reducing size of the Member Briefing Service to fit members' requests
 - More exclusive content for members, including possibility to access recordings of relevant meetings.

- **Enhance member's engagement**

- Increase of the number of options and channels for engagement: working groups, workshops and task forces;
- Increased opportunities to participate to policy consultations.

Policy framework

Policy Priorities 2018

- **Cooperate with the members in addressing the Clean Energy Package implementation at national level**

- SHE followed all major discussions (trilogues etc.) and lobbying on most relevant topics (PEF, Renewable Heat Obligation etc.);
- Coordination of policy event in cooperation with ECI and other RES H&C, RES in general and other relevant players;
- Targeted communication towards policy makers (eg.: factsheets);
- Participation in the revision of Annex VIII: mapping of H&C in Europe;
- SHE engaged with members, setting up a “Policy Working Group”. The WG focused mainly on the national actions towards 2020 and the implementation of the Clean Energy Package;
- Consultation with BoD, members and experts, especially for SHE contribution to the 2050 EU long term strategy consultation, and the Solar Heat Manifesto.

- **Promote measures at national level to bridge the gap on 2020 targets for solar heat**

- Support upon request to Member's efforts at national level;
- Following evolution in terms of support policies in main markets;
- Policy and PR work to strengthen solar thermal's position in the European debate and bring H&C higher in the policy-makers agenda;
- Involvement in the European Commission's Clean Energy Industrial Forum;
- Political partnerships with several organisations, mainly focused on heating & cooling;



- Cooperating within DecarbHeat on the organisation of the high-level event organized by the EU Commission on the decarbonization of the heating sector.
- **Explore opportunities for improved financing mechanisms addressing solar heat**
 - Assessing possible measures that can impact the market namely financing mechanisms being put into place, at European level or local level;
 - Lobbying for provisions that can allow ERDF and Cohesion Funds to have a stronger role on the switch to RES-H&C at regional and local level;
 - Advocating for stronger investment in R&D for solar heat and thermal storage;
 - Lobbying for a focus on climate and energy in the next research programme Horizon Europe;
 - Interview with BPIE addressing the opportunities and risks for the heating and cooling sector, on decarbonizing the European building stock;
 - Report on financing mechanisms relevant for solar heat.
- **Develop position papers on the expansion of solar heat market segments**
 - Dedicated task-forces for the main market segments: solar heat for industrial processes (SHIP); solar district heating (SDH); solar heat in Buildings. Identification of priority actions;
 - Workshop promoting solar district heating to utilities;
 - Cooperation with paper industry to promote SHIP;
 - Report on developments in SDH and SHIP market segments.

Industry's Competitiveness

- **Promote storage solutions and smart thermal grids as central to the future energy system**
 - Promotion of thermal storage as a policy and technology enabler in different for a and in relevant documents, including Clean Energy Industrial Forum;
 - Efforts to establish partnership with sectoral organisation.

- **Gather and promote essential information on solar heat projects, best practices and LCoH**
 - Report on market segments and financing instruments;
 - Contacts with several relevant projects, collecting data for report and future factsheets.

- **Promote a better framework for solar heat in the package label**
 - Work with sector experts (task-force) on the labelling aspects, following the discussion on the review of Lot1 & Lot2;
 - Contributing to work of EC consultants during process;
 - Development of a formal contribution from Solar Heat Europe;
 - Development and improvement of online tools addressing the package label and the solar device, under Labelpack A+ project;
 - Coordinating and preparation of several documents assessing the implementation of the package label, some of its shortcomings and proposing recommendations, under Labelpack A+ project.

Other areas: ongoing activities and support areas

Continued support to key structures for Solar Heating and Cooling and key support areas for Solar Heat Europe work. We indicate below some highlights, covering some of the main actions and activities.

▪ **RHC-ETIP and ESTTP**

- Supporting work of the RHC-ETIP Board and the activities of the ESTTP:
 - inputs to Horizon 2020,
 - elections ESTTP,
 - review of RHC-ETIP structure,
 - contribution to RHC-ETIP Horizontal Working Groups
- Joint work on tender for European Commission on RHC R&I
 - monitoring of the SHC roadmap implementation,
 - monitoring R&I projects done,
 - contribution to report on H&C market,
 - inputs to report on consumer behaviour
- Cooperation with EC on conference addressing R&I investment in Solar Thermal.

▪ **Standardisation & Certification**

- Promoting Solar Keymark Network and quality assurance as a relevant framework for the sector in Europe;
- Supporting the functioning and administration of SKN; including the management of the Solar Certification Fund and the implementation of its communication strategy;
- Standing cooperation with TC312 and joint organisation, with SKN support, of a workshop on the future of standardisation for solar thermal;
- Cooperation with TC312 and several members on an initiative to address standardisation of hybrid systems.

▪ **Communication:**

- Improvement to the Solar Heat Europe website, in content and functionalities;
- Publication of Solar Heat News, as an open Newsletter;
- Continuation of the bi-weekly Membership Briefing Service, with a revised concept, based on member's inputs.