

Minutes
Solar Heat Europe/ESTIF
General Assembly
Friday 30 November 2018, 09.00 – 14.15

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

FINAL AGENDA

Opening

1. Welcome and approval of agenda
2. Approval of minutes of the 1 December 2017 General Assembly

Reports

3. Approval of final 2017 accounts
4. Activity report 2018 & provisional 2018 accounts

Statutory issues

5. Vote on changes to the Working Rules regarding membership geographical scope

Elections for statutory bodies

6. Election of the Solar Heat Europe/ESTIF Board and of the Solar Heat Europe/ESTIF President
 - a. Procedure
 - b. Selection of observers for the electoral process
 - c. Presentation of candidates
 - i. Solar Heat Europe/ESTIF President
 - ii. Solar Heat Europe/ESTIF Board
 - d. Election (secret ballot)
7. Election of the Internal auditor
8. Declaration of election results

Policy framework for renewable heating and cooling

- 9. Address by External guest
- 10. Debate session

Priorities and budget

- 11. Priorities for 2019 & approval of 2019 budget

Solar thermal market development

- 12. Market development: update and discussion

General Assembly Closing

- 13. Date of the next Ordinary General Assembly
- 14. Any other Business
- 15. Closing by Solar Heat Europe/ESTIF President

LIST OF PARTICIPANTS

ASSOCIATIONS

ATTB/ Belsolar
BDH
BSW
EBHE
Holland Solar
SPiUG

Wim Persoons (WP)
Lothar Breidenbach (LB)
Jan Knaack (JK)
Costas Travasaros (CT)
Marcel Cloosterman (MC)
Janus Starościk (JS)

INDUSTRY

Ernst Schweizer
GREENoneTEC
KBB
Resol

Andreas Haller (AH)
Martin Fasod (MF)
Stephan Fintelmann (SF)
Isabel Pfeil (IP)

SERVICE PROVIDERS

IGTE (ITW/TZS)
Trenkner Consulting

Harald Drück (HD)
Uwe Trenkner (UT)

SUPPORTER

CENER

Jorge Molina Villanueva (JMV)

DELEGATION OF VOTE (PROXIES)

BSW
SPF
ENERPLAN
Janus Energy

Jan Knaack
Andreas Haller
Uwe Trenkner
Costas Travasaros

Solar Heat Europe / ESTIF Staff

Geoffroy Cazenave (GC)
Irene di Padua (IdP)
Julien Tate-Smith (JTS)
Leopoldo Micò (LM)
Pedro Dias (PD)

ABBREVIATIONS USED

BoD – Board of Directors;

CEN – European Committee for Standardisation

CEN TC312 - CEN Technical Committee on solar thermal products

EU - European Union

ISEC - International Sustainable Energy Conference

LCoH - Levelised Costs of Heat

GA – General Assembly;

PEF - Primary Energy Factor

RES – Renewable Energy Sources

RHC (or RES-H&C) - Renewable Heating and Cooling

RHC-ETIP - European Technology and Innovation Platform on Renewable Heating & Cooling

SDH - Solar district heating

SHE - Solar Heat Europe/ESTIF

SHIP - Solar heat for industrial processes

SKN - Solar Keymark Network

1. Welcome and approval of agenda

The SG introduced Harald Drück, which has been proposed by the Board to chair the General Assembly. SG requested members to welcome HD as chairman, which was agreed.

HD thanked the members and welcomed everyone to the General Assembly. He presented the apologies by Nigel Cotton, which, as Vice-President of the Board has been the Acting President since the resignation of the former President, Robin Welling.

HD invited to Solar Heat Europe Secretariat to introduce themselves.

HD presented the agenda of the meeting has proposed by the Board. The agenda was approved without changes.

2. Approval of minutes of the 1 December 2017 General Assembly

HD 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 2017 accounts

Harald Drück introduced the point and reminded the members that the 2017 accounts would have to be voted. He invited the Treasurer Stephan Fintelmann (SF) and the Secretary General, Pedro Dias (PD) to present the 2017 accounts, that had to be voted by the members. SF stressed that the result was positive in spite of some of the challenges that had to be deal with. He praised the SG for the work done.

PD 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 main 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 5 267, about three thousand Euros better than budgeted. Furthermore, the total reserves reached almost 235 thousand euros (€234 729).

The positive result was possible in spite of a drop on income coming from membership fees in comparison with 2016, even though the final amount was above the budgeted amount by EUR 8 200, being the main reason for the positive result registered.

The Internal Auditor, Wim Persons presented his report, recommending the approval of the accounts.

HD opened the floor for questions or comments, though no one took the floor.

The Chair put the 2017 accounts for vote. The accounts were approved by unanimity.

4. Activity report 2018 & provisional 2018 accounts

a. Activity Report 2018

Harald Drück gave the floor to the Board member Andreas Haller, in order to present the activity report for 2018. He started pointing out what the main priorities Membership & organisation; Policy framework, and; Industry's competitiveness.

He pointed out that one of the main challenges was to increase the membership of the organisation and the related income, the work in relation to the package label and pushing for the policy priorities that can help the competitiveness of the sector. He also pointed out that from the Board perspective, another relevant point was to address the resignation of the President.

He then gave the floor to the Solar Heat Europe Secretariat in order to present the work done in the different areas in more detail.

The reporting on the 2018 membership & organisation priority was presented by Geoffroy Cazenave (GC). This priority was encompassing four categories of actions in 2018: (1) recruiting new members, (2) increasing Solar Heat Europe's and the sector's notoriety (3) improving services provided by Solar Heat Europe to its members, and (4) enhancing Solar Heat Europe's member's engagement.

After over one hundred organisations reached, the member's recruitment campaign went below the expectations with three new members recruited, while four members resigned during 2018. In order to strengthen the efforts of the membership campaign, Solar Heat Europe also worked closely with external partners to promote his services during a certain number of conferences or webinars (i.e. CEN TC312; EuroHeat & Power, RHC-ETIP) which were targeting Solar Heat Europe's member-base audience.

To increase the solar thermal sector and Solar Heat Europe's notoriety, the organisation was involved in the main events of importance for the sector, among them, Eurosun, ISEC, SDH conference, EHI conference on Buildings, EC High level event on Decarbonisation

of Heating & Cooling. Being present at such events offered Solar Heat Europe the possibility to showcase the positive side to the sector and open potential new partnership opportunities.

In order to strengthen the actions triggered by the participation to these events, Solar Heat Europe has also invested into strengthening and developing partnerships with different organisations, such as CoolingEU, DecarbHeat, DecarbEurope or the Higher Ambition Coalition.

To highlight the sector's work and position, several communication campaigns were led in 2018 to support the sector's interests, among them #NoWildElectrification, #CheckYourHeating and DecarbEurope communications campaigns. It is also important to specify that almost 50 press articles were published this year mentioning Solar Heat Europe and its work. By opening to the public some articles of the organisation's newsletter, the Solar Heat News, Solar Heat Europe has also reached a different audience than previously targeted and increase the promotion of its work.

Solar Heat Europe in 2018 has dedicated its time to improve its services to members. By improving the Member's Area's security section of the website, Solar Heat Europe is also able to identify the diverse sections of the website which are the most visited and attract most of the members' interest. Based on this newly acquired knowledge, it will be easier in the following month to improve the organisation's services. Two services provided by Solar Heat Europe have been improved with the size reduction of the Member Briefing Service, a request that was made by the members, and the Business opportunity service has been enhanced to find better opportunities that correspond to our members' needs. Furthermore, the process of archiving the different workshops and meetings for the members is becoming a cornerstone of the organisation to build a multimedia library for the sector and Solar Heat Europe members, which can be consulted anytime.

Members' engagement in Solar Heat Europe activities, in these last years, has been relatively shy. To tackle this particular issue, Solar Heat Europe has developed and organised different online events to allow its members to provide its feedback. Working groups, workshops and taskforces were the main tools to reach them in addition to the different consultations opened to the members. Furthermore, with the possibility to replay these different meetings using the website's archives section, members also have the opportunity to provide Solar Heat Europe staff with their feedback and additional comments.

There was a question regarding the results of the membership recruitment campaign and the main difficulties identified in getting members on board. GC referred that there were also diverse issues, though the budget limitations of the companies were a common barrier.

Answering another question on the changes on membership, GC and PD clarified that the new members were SPIUG, EBHEK and Absolicon and the resignations were from Kingspan, TiSUN, HEWALEX and Resol.

The policy reporting for 2018 was introduced by Irene di Padua (IdP) which presented the four main areas of SHE intervention. The first one was related to the Clean Energy Package and its national implementation. In this context SHE followed all the major discussions (trilogues etc.) and created targeted communication towards policy-makers to lobby for the most relevant issues (PEF, renewable heating schemes, ST in urban planning...) also in cooperation with other RES associations. IdP presented also SHE participation in the revision of Annex VIII process, stressing the importance of the obligation which will create an extensive mapping of the EU heating sector and its potentials. Finally, she briefly introduced the new Policy Working Group, SHE 2050 vision and the updated Manifesto of the association to the members.

The second area of intervention focused on the short-term perspective, and the measures to bridge the gaps for 2020 targets. SHE closely followed the evolution of this topic, and proactively lobbied to strengthen solar thermal's position in the EU debate and policy makers' agenda. These efforts resulted in two high-level opportunity, the Clean Energy Industrial Forum and the Decarb Heat event, where SHE – with other RES associations – brought its expertise and perspective to assist the work of EU institutions.

The third relevant development covered the topic of financing. IdP presented the file on ERDF and cohesion fund (CF), and the lobbying activity SHE is conducting to have more effective provisions and strengthen the RES-H&C role at local level. Furthermore, SHE advocated for a major role and further investments for thermal storage and investigated possible improvements for the next EU research programme Horizon Europe. SHE is also working on an in-house report on the topic of financing the renewable heating transition, focusing on mechanisms relevant for solar thermal.

Finally, IdP explained the last area of action: the development of solar heat market segments and the establishment of dedicated task forces on solar heat for industrial processes (SHIP), solar district heating (SDH) and solar heat in buildings. SHE also organised a workshop to promote SDH to utilities and will host an event on SHIP in cooperation with the EU paper industry (CEPI).

There were not any questions from the floor. AH gave the floor to PD to present the work done in relation to the third priority, on Industry's competitiveness, which included promoting storage solutions and smart thermal grids as central to the future energy system, gathering and promoting essential information on solar heat projects, best practices and LCoH and promoting a better framework for solar heat in the package label.

Regarding the work on storage, PD referred that while SHE managed to stress thermal storage as a policy and technology enabler in different for a and in relevant documents,

including Clean Energy Industrial Forum, it was not possible to establish a partnership with the sectoral organisation, as they didn't regard thermal storage as a priority. Additionally, the SHE team has worked in gathering and promoting essential information on solar heat projects, best practices and LCoH. He pointed out a report on market segments and financing instruments and established contacts with several relevant projects, collecting data for report and future factsheets.

PD presented one of the main priorities, which referred to the package label, namely promoting a better framework for solar heat in the regulations. For this they have worked with sector experts (taskforce) on labelling aspects, following the discussion on the review of Lot1 & Lot2. This taskforce contributed to the work with EC consultants and developed a formal contribution from Solar Heat Europe. In addition, SHE worked on the development and improvement of online tools addressing the package label and the solar device, under Labelpack A+ project. Under this project they have coordinate and prepared several documents assessing the implementation of the package label, some of its shortcomings and proposing recommendations.

He also pointed out the work done on other relevant topics for the organisation, that they consider support areas, such as standardisation & certification; the support to the Solar Keymark Network, and the work on communication. Regarding the later, PD pointed out the improvement to the Solar Heat Europe website, in content and functionalities, the publication of Solar Heat News, as an open newsletter, and the continuation of the bi-weekly Membership Briefing Service, with a revised concept, based on member's inputs.

There was a question in regard to the Solar Keymark, in particular the data on reference area (gross or aperture). HD clarified the changes that had happened, and AH referred that this shall also be followed up by the Secretariat.

b. Provisional 2018 accounts

Stefan Fintelmann (SF) presented the update on the execution of the 2018 budget, noting that this point was only for information. He noted that a negative result was expected, around 20 000 euros, though better than initially budgeted. SF pointed out some of the developments in terms of the execution/

There was a question regarding the changes in the contributions from projects and Solar Keymark. Pedro Dias explained that the main reference should be the net contribution from the projects, as often the change in incomes related to projects was caused by lower expenditures, hence resulting in a similar net contribution.

5. Statutory issues: Vote on changes to the Working Rules regarding membership geographical scope

Harald Drück introduced the proposal for change in the Working Rules regarding membership geographical scope. He explained that this was related to Brexit and the need to consider how the United Kingdom would be considered. This required a change in the working rules as proposed. Furthermore, the Board discussed what would be the relevance of extending the possibility to non-European members. As such they proposed to open that possibility on the basis of a case-by-case assessment of the BoD.

There were some comments from members regarding opening the possibility to have non-European members with some members expressing the preference for a stricter application and other members supporting the flexibility based on the decision of the Board.

After the short discussion, HD has put the proposal for vote. The proposal was approved with one abstention and no votes against.

6. Election for statutory bodies

Harald Drück introduced the point explaining that this procedure would be chaired by the SG. Pedro Dias explained the process. He explained that the election would be done first for the President and for then the rest of the Board, as stated in the statutes.

PD requested the audience for two candidates to be observers to the election process. Uwe Trenkner and Jan Knaack have volunteered and were accepted by the plenary.

The candidates have presented themselves to the plenary, explaining the motivation for their candidatures.

The first presentation was from the only the candidate for President of the Board, Costas Travasaros (CT), nominated by EBHE. He presented his long experience in the sector and in trade associations in Greece and Europe. He stressed the importance of the work that is done by these associations, in particular when the market is dropping. On the other hand, he referred that there was a lot of work done by SHE, though membership was decreasing. He defined as a priority to revert such trend.

The subsequent presentations were from the candidates to the remainder Board positions, in the following order:

- Associations:
 - Lothar Breidenbach, BDH
 - Marcel Cloosterman, Holland Solar

- Industry:
 - Stephan Fintelmann, KBB Kollektorbau
 - Andreas Haller, Ernst Schweizer
- Service Providers
 - Harald Drück.

These candidates were up for re-election, apart from Mr. Cloosterman, who was a first-time candidate.

After the speeches by the candidates, a period of questions and answers was opened. There was a question on procedural matters but no question for the candidates.

The quorum was re-established. There were seventeen members present or represented, totalling 46 votes. Then members proceeded immediately for the vote.

Election of the Internal auditor

Regarding the internal auditor, the members expressed their gratitude to Wim Persoons for his work as internal auditor. There was a call for candidates for internal auditor. Wim Persoons mentioned that he would be available to continue the work. Members acclaimed Wim Persoons, from ATTB/Belsolar as internal auditor for one more term.

Declaration of election results

Pedro Dias invited the candidates to come to the front and offered them, on behalf of Solar Heat Europe/ESTIF, a souvenir of their mandate in the Board, thanking them for their dedication to the organisation. PD also thanked David Stickelberger that was ending his mandate but could not be present. PD also noted his appreciation for the work and dedication from the previous President, Robin Welling, which resigned earlier in the year, after several years as Board member or President. He also referred that it had been for him a privilege to work with Mr. Welling over that period.

The SG proceeded to present the results of the elections. He announced that all candidates had been elected. CT was elected unanimously. The same happened for Lothar Breidenbach, Andreas Haller and Harald Drück. As for the other candidates, Marcel Cloosterman and Stephan Fintelmann received respectively 95% and 89% of the votes.

7. Policy framework for renewable heating and cooling

This session included an external guest, Paula Abreu Marques, Head of Unit in DG ENER, responsible for Renewable Energy and CCS. Mrs. Abreu Marques was accompanied by Eva Hoos, Policy Officer in charge of Heating and Cooling for the renewables unit.

Mrs. Abreu Marques provided an overview of the Clean Energy Package and its main provisions, stressing how comprehensive this package was, covering several dimensions of the energy policy of the European Union. The completion of this package, which included the Energy Performance of Buildings Directive, the Energy Efficiency Directive and the RES Directive, all of them promoting the use of renewable energy, namely solar energy. This package included provisions to promote the engagement of consumers and the additional use of RES in buildings. The completion of the Clean Energy Package represented a major achievement for renewables and energy efficiency in the European Union. Mrs. Abreu Marques invited also her colleague Eva Hoos to explain some of the main outcomes from the perspective of solar heating and cooling.

There were some questions from the audience. One of the questions referred the , namely regarding the lack of binding national targets, the potential for the use of solar heating and cooling as part of demand side management in the ETS and the proportion of support given to PV with feed-in tariffs.

Mrs Hoos and Mrs Abreu Marques addressed the questions, noting that there was a national target and a governance process to ensure that the target would be met, noting that the ETS was applicable for larger scale and it was not foreseen in the CEP to expand it to the residential sector, on heating and cooling and the fact that CEP should provide a level playing field for different renewables and defend the stability for investors.

Another question addressed the role of solar heating and cooling in the 2050 vision. The reply to this question is that the contribution from several RES heating and cooling solutions is relatively limited today while, in parallel, there is a great focus on RES electricity. The RES-H&C sector needs to needs to explain that it has a great potential and can play a role in the future and confirm it is able to get to a bigger level of deployment. Furthermore, it was noted that the modelling for heating and cooling needs to be improved, as it is still in its infancy and a more granular approach is needed.

Finally, Mrs Abreu Marques and Mrs Hoos stressed the positive narrative that renewable heating technologies should bring in the debate, and the relevance of the solar thermal sector, especially at local level.

8. Priorities for 2019 & approval of 2019 budget

Priorities 2019

PD presented the priorities for 2019, under the motto of “Re-energizing solar heat”. He referred that the motto meant the need to point out the sector’s strengths and achievements, both internally and externally. PD referred that in the solar thermal sector there is a strong belief in the merits of the technology and its untapped potential. As such, it was important to be better and more assertive in bringing the message to decision or opinion makers.

This means also that the sector needs to learn from the approaches of other sectors to communicate better. Assuming a role as an essential technology, building trust in its capability to contribute to decarbonisation and as a no-regrets solution. PD referred that Solar Heat Europe would focus on this challenge and mobilise the sector towards the need for more positive messaging.

Another priority would be the competitiveness of the sector. SHE can contribute by continuing to work on addressing the specific needs of the three main market segments. Furthermore, solar heat will have more opportunities if storage solutions and smart thermal grids become central to the future energy system. SHE can further contribute to the sector's reputation and competitiveness by creating conditions for trust in the technology based on data from existing projects, including best practice examples, and enabling stakeholders to better assess the risk of different solutions.

IdP presented the priority related to the Policy Framework. As usual, in particular in the context of new EC policies for energy, working on putting in place an adequate policy framework, both at national and European level, shall also deserve a special attention. As referred in the previous session with the European Commission, the Clean Energy Package, approved at the end of 2018, opened new opportunities for renewable heating and cooling, namely implementing proposed measures at national level. The combination of this process with the Multi-Financial Framework negotiation, including a new set of European funds, will open opportunities for improved financing mechanisms addressing climate change, including renewable heating and cooling, investment at regional and local level.

GC presented the priority related to the need to improve the capacities of the organisation. Growing the membership base is important to increase of financial resources and in order to increase the representativeness of the organisation and increase the expertise base. Increasing the interaction with members will be part of the same process, keeping members informed of essential issues but also being able to collect inputs. Better servicing will contribute to increase the value members attribute to Solar Heat Europe membership, helping to retain members but also to become more attractive to other entities. This includes also improving SHE's image and notoriety, within and outside the sector.

PD provided also an overview of the different support areas, followed by a period of questions and answers.

The elected President made a comment supporting the work with other trade associations, recommending working with sectors such as tourism. He also stressed the need to work more in terms of promoting exports from Europe to other regions, supporting members and engaging EC in this process. The elected Board member Marcel Cloosterman (MC) stressed the need to push for a level playing field and aiming for solar thermal to a similar level of support as done for PV and other technologies

over the years. MC also referred the need to work with national associations and support them in their work on the promotion of solar thermal.

Budget 2019

PD presented the budget proposal for 2019. He pointed out that it was a negative budget, totalling EUR 24 640.

The proposed negative result was related to the need to keep running costs at the current level, namely in terms of staff costs. This option was also taking into account that there was a continued reduction on incomes from membership fees and that it was needed to invest in terms of the capacity to work on membership and on project acquisition. The fact that the level of results will be, by the end of 2018, at an expected level of €215 000, lead to the Board to consider that the proposed loss could be covered from the reserves, seen as an investment, while the reserves at the end of 2019 would still be at a high level (approximately 190 thousand euros).

HD reiterated the Board position of the Board, regarding the need to consider the investment and also taking into account that the income level projected was very conservative. HD opened the floor for questions.

There was a question from the elected President regarding the options for additional activities. The SG stressed that the options to increase income, from membership and from projects, were on the table and those could release resources for additional activities.

HD opened the vote on the budget for 2019. The budget was unanimously approved.

9. Market development: update and discussion

HD informed that the market session would be led by Lothar Breidenbach (LB) and PD and he concluded is role as chair of the GA.

LB provided an overview of the situation regarding the different markets, based on the information collected from national solar trade associations. For 2018 and 2019 there are several markets presenting prospects for an increase in both years: Greece, Spain and Portugal with a moderate increase and Poland and Denmark with stronger increases. In Netherlands a decrease was expected for 2018 but the prospects for 2019 were quite positive. Other markets presented negative prospects for both years, such as Germany, France, Austria and Belgium.

The situation per country was presented in more detail and several countries were discussed in more detail, by the participants.

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 29th November 2019. On the 28th 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 2019 General Assembly on the 29th November 2019.

11. Any Other Business

No points were addressed.

12. Closing

Pedro Dias thanked his colleagues from the Secretariat for the organisation. He thanked in particular Geoffroy Cazenave that was going to leave Solar Heat Europe and Brussels by the end of the year, to take new professional challenges. This was supported by an acclamation from the plenary.

The SG then closed the meeting.