

IEA SHC & Solar Thermal Trade Association Web Meeting

June 24, 2019

Participants

Pascual Polo Amblar - Asit Solar, Spain

Nigel Cotton – European Copper Institute, Belgium/IEA SHC ECI

Pedro Dias - Solar Heat Europe, Belgium

Bärbel Epp - Solrico, Germany

Ken Guthrie - IEA SHC Australia

Richard Hall - UK Solar Trade Association/IEA SHC United Kingdom

Fred Ishugah - East African Centre for Renewable Energy and Energy Efficiency (EACREEE)

Jaideep Malaviya - Solar Thermal Federation of India (STFI)

José Vitor Mamede - ABRASOL, Brazil

Daniel Mugnier - IEA SHC France and IEA SHC Executive Committee Chair

Pam Murphy - IEA SHC Secretariat

Edwige Porcheyre-Gautier - ENERPLAN, France

Costas Travarasos - EBHE, Greece

Werner Weiss - IEA SHC Austria

1. Welcome – Nigel Cotton

2. Snapshot of the IEA SHC – *Daniel Mugnier*

- 20 country members + the EC; 4 sponsor members (ECI, ECREEE, RCREEE, ISES)
- 8 current projects, the newest will start in September on Solar Neighborhood Planning
- SHC 2019 is being held together with SWC 2019 on November 4-7 in Santiago. Early bird registration ends August 31.

3. Trends in the World Market - IEA SHC report, *Solar Heat Worldwide* – *Werner Weiss*

- 2018 important trend change occurred – positive growth rates recorded in 9 of the top 20 countries
- Important to note: 90% of the market share remains small-scale residential systems
- Growing but still niche markets: large scale solar systems, SHIP, solar cooling and PVT
- Full report available at, <https://www.iea-shc.org/Data/Sites/1/publications/Solar-Heat-Worldwide-2019.pdf>

4. Results of Trade Association Survey (13 responses/10 countries + Solar Heat Europe) – Nigel Cotton

Which top 3 trends (challenges/opportunities) in your markets do you think we as associations have in common?

- Opportunities – many different opportunities were noted, but the key ones were:
 - To level playing field
 - To improve how solar thermal is promoted, public relations
 - Financing

- Challenges – many different challenges were noted, but the key ones were:
 - System integration
 - Market conditions in many countries
 - Financing
 - Promotion of solar thermal – e.g., in national Energy and Climate Plans (it was noted that in Europe discussions on this issue are currently underway) and within in the building sector

How could the IEA SHC better support market development?

- R&D in materials, thermal storage, and price reductions for storage and collectors
- Assess synergies between solar heating and cooling and electrification
- Facilitate the assessment of financiers for SHC projects and building trust in the technology and confidence in the results
- Work on standards for components, digitalization, and integration of smart grids.
- Provide high-quality, reproducible content for promoting solar heating and cooling and information for final users on the technology and its use
- Show more benchmarks and scientific statements to better influence policies
- Spread positive messages about ST beyond its use in the residential sector
- Lobby

What could industry and IEA SHC do together to move the market forward?

- Collaborate to improve products and services to support industrial, large-scale installations
- Improve communication, e.g., information for financiers on existing solar heating and cooling solutions, promote successful projects, conduct market studies and disseminate their results
- Support legislation for ‘solar water heating first’
- Work towards internationalization of standards
- Provide a platform for companies to explore opportunities in different markets
- Organize lobbying actions targeting international influencing organizations (e.g., IEA, IRENA, RE100, World Bank)
- Hold regular events

Is it time for a Global Solar Thermal Industry body?

- Majority (7) stated “Yes” 7 and 4 stated “Maybe”

5. Discussion

Global Solar Thermal Industry body

- Ken Guthrie suggested that since ST is just one part of building technology perhaps other associations should be included e.g., AC and refrigeration. Nigel Cotton added that the industry leaders will be those that control buildings' thermal comfort and no individual technology is able to handle this. He suggested including the AC industry as a starting point.
- Daniel Mugnier suggested that since the ST markets are quite fragile we start with a clear, common message and then develop a strategy for a global approach.
- Pedro Dias suggested that global cooperation be done informally through activities like this meeting and then see how the collaboration evolves. He noted that the European industry and associations still facing difficult times.

What could industry and IEA SHC do together

- Pedro Dias proposed focusing only on the issues that **impact our sector directly and provide global examples (e.g. smart cities integration, digitalization)**, cost competitiveness and financing (upfront investments and impact of interest rates, financiers need to better understand the technology to consider lower interest rates and different financing mechanisms. Increase awareness for specific target groups.
- Jaideep Malaviya noted that in India technologies are not reliable so need to focus on **R&D**.
- Richard Hall proposed exploring the concept of a **professional body for solar engineers** as they are not recognized in the existing engineering bodies. Fred Ishugah supported this idea and noted that this is case in Africa. Daniel Mugnier added that such an association could give confidence in the technology to building owners, customers, financiers, etc. Costas Travasaros supports the idea certification training for installers as there is a growing need for them and an professional engineering body.
- Edwige Porcheyre-Gautier noted that in France the issue has not been reliability of the technology, but communication and lack of financing. Proposed that we together work on **communications activities** to highlight ST within specific projects, means to reach decarbonization targets, reasons why project owners (large scale and single-family) should consider ST, performance guarantees of large systems.
- **PVT** a 1M square meters sold. In France the main driver for customers is the PV component.

Recap

Main focus areas were:

- Increase confidence in technologies, particularly large systems
- Financing
- Cost competitiveness (finance and R&D)
- Professional bodies 1) solar installers and 2) solar engineers
- Global PVT development – tendering, bids, auctions
- Communication – targeting financiers, project owners, building sector and residents

Next Steps

- Trade Association Task Force (TATF) responsible for carrying these ideas forward. First activities should be to 1) plan a meeting in conjunction with SHC 2019 in Santiago (November 4-7) and 2) draft work plan and budget.
 - TATF members: Nigel Cotton, Daniel Mugnier, Edwige Porcheyre-Gautier, Ken Guthrie, Richard Hall, Fred Ishugah, Jaideep Malaviya, Werner Weiss
- Next web meeting week of September 23, and if needed, a follow up meeting the week of October 7
- Pam Murphy will send out a Doodle Poll for the September meeting date.