

European Solar Thermal markets

Developments and framework conditions

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Introducing ESTIF

- European Solar Thermal Industry Federation
- Representing the solar heating and cooling sector at EU level
- 105 members, representing >95% of the market
- A founding member of EREC
- Based in the Renewable Energy House, Brussels



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Thanks!!!

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Intelligent Energy  **Europe**



Transfer of experience for the development of Solar thermal products

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Building + solar thermal: the old add-on approach



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Integrating solar thermal into buildings



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Integrating solar thermal into buildings



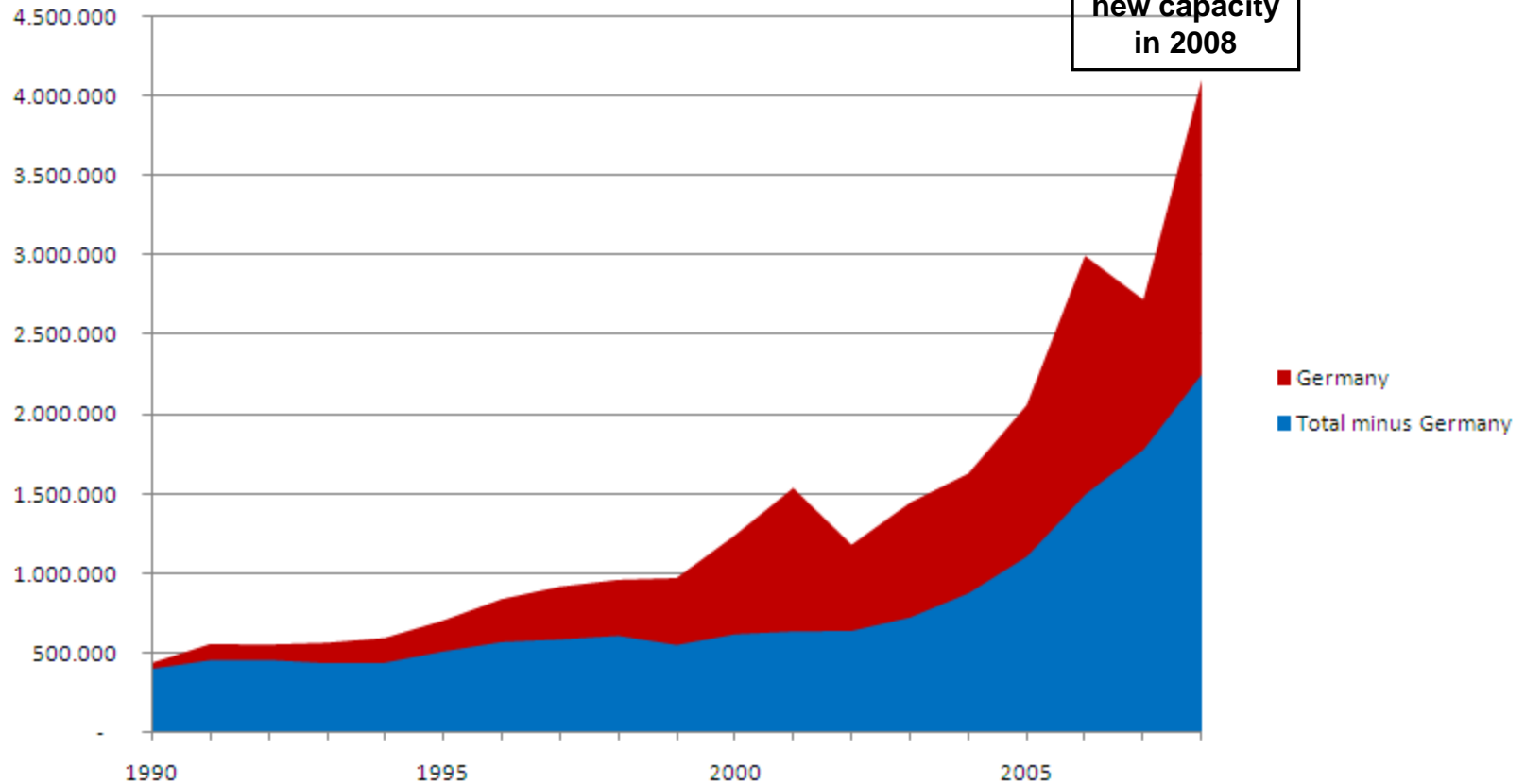
Integrating solar thermal into buildings



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EU Solar Thermal market 1990-2008*

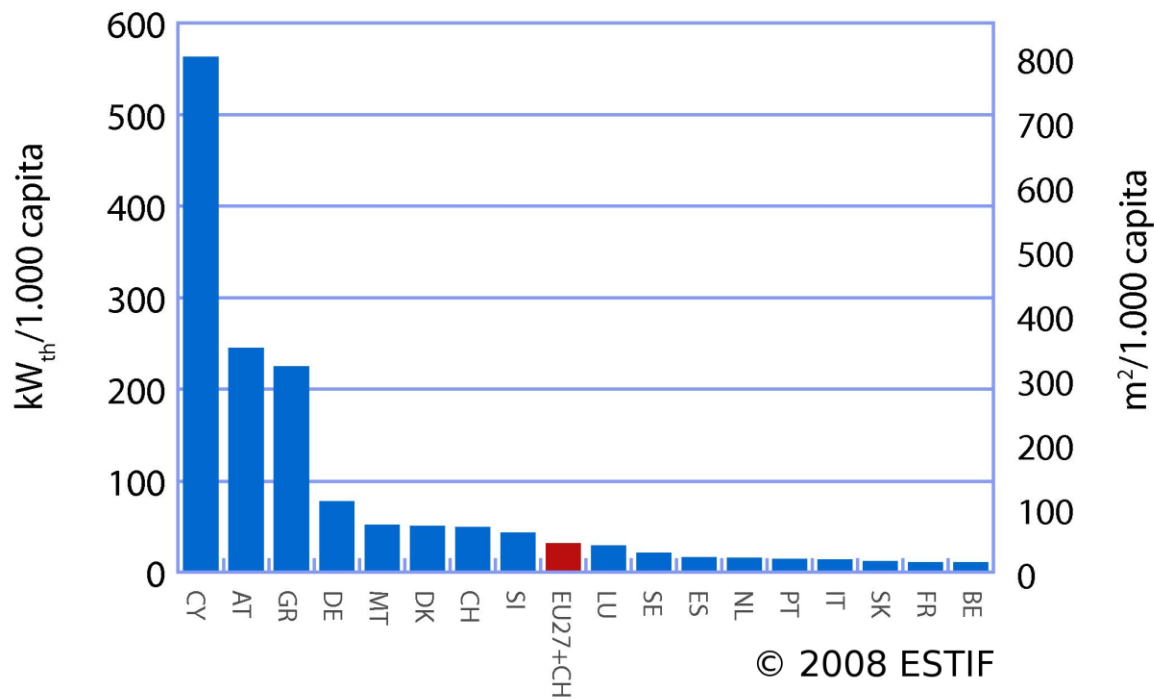
m² of collector area



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Great disparities in Europe

Solar thermal capacity in operation per 1.000 capita in 2007



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Ambitious national target + coherent measures



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EU Renewables Directive

- Agreed by European Parliament and Council in December 2008
- Formal adoption in April 2009
- Transposition into national law within 18 months



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Main concepts of the RES-Directive

- 20% EU RES-target by 2020
- Mandatory national targets
(CZ: 6.1% in 2005 -> 13% in 2020)
- National Renewable Energy Action Plans:
 - national targets for the shares of energy from renewable sources in transport, electricity and heating and cooling in 2020
 - adequate measures to be taken to achieve these national overall targets



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Major boost for solar thermal

- Renewable heating/cooling at the same level as RES in electricity and transportation
- RES obligation in new and existing buildings by 2015
- Exemplary role of public buildings
- Qualification of installers
- European standards and certification



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Next steps – NATIONAL IMPLEMENTATION

- National Renewable Energy Action Plans
 - high target for RES heating/cooling
 - best possible RES obligation
 - qualification/certification of installers
 - information to professionals
 - reduction of administrative barriers
 - exemplary role of public buildings



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The new policy and market frameworks will be a key topic at the

4th European Solar Thermal Energy Conference

estec (2009

Munich, Germany • 25-26 May



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