

Impact Report 2020



A new dawn for UK solar



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This year, we're taking a major leap forward as a trade association. We're evolving into Solar Energy UK, a more modern trade body with serious ambition for our industry, aiming for at least 40GW of solar and energy storage by 2030. Solar Energy UK will also generate more clout, attract more members and build better partnerships.



Our re-brand goes right to the heart of who we are and what we stand for, with three new core values – commitment, collaboration and credibility – which our members agree are reflected in our approach. It all comes with a new [website](#), a major work-plan and an annual impact report.

We hope you'll agree that our new look better showcases what we're about. We're the leading specialist association for solar and energy storage in the UK, and we want our members to feel proud as we roll-out our new brand and enter a new era together.

Our purpose
To catalyse the collective strengths of our members to build a clean energy system for everyone's benefit



2020 tested our resilience but not our resolve

Jonathan Selwyn, Chair

Well, that was not quite the year we all expected. Last January, there was a real air of anticipation in the UK solar industry. The underlying economics suggested the imminent roll out of subsidy free solar parks, renewed interest in commercial rooftop and growing residential demand. We looked forward to the UK hosting the global COP26 climate change summit. The only major uncertainties were Brexit and a new government.

"We have ridden out the storm and have reasons to be optimistic."

What unfolded was a global pandemic, which has had an unprecedented social and economic impact in the UK. Yet our industry is resilient, and the pandemic has demonstrated something powerful about solar technology and the players in this business. We have ridden out the storm and have reasons to be optimistic.

Solar companies had to rapidly adapt their working practices and business models. The Solar Energy UK quickly pivoted to online, providing a regular flow of webinars, working groups and events, which have been very well attended. Where members have struggled with cashflow, we have been flexible with payment terms. For the vast majority, however, business has picked up well in the second half of the year. Indeed, membership growth has continued, with over 230 companies now on board.

In May, our spirits were lifted by solar's contribution to UK electricity supply peaking at over 30% and creating a record of 11% of all UK electricity coming from solar. We glimpsed the future that some had argued would crash the grid. The developers of new large-scale projects have a rapidly growing pipeline of over 13GW – a quarter with planning and

connection agreements in place. In the rooftop market, commercial installers are delivering ever-larger projects and, whilst many in the residential segment were forced to furlough staff for a time, installation rates have now bounced back to pre-pandemic levels.

"We glimpsed the future that some had argued would crash the grid."

Another welcome development has been how we captured the public imagination with the idea of a green economic recovery to accelerate the transition to a low-carbon future. This has helped us to successfully lobby for the opening up of Contracts for Difference (CfD) auctions to solar, £2bn funding for public sector decarbonisation and the Green Homes Grant encompassing solar thermal. These are major achievements.

So, the optimism we started the year with has not dimmed. If anything, there is a greater demand for solar projects which I am confident will come to fruition next year, keeping us on track for 40GW of solar in the UK by 2030.

2020 was a challenging but rewarding and occasionally exhilarating year for the industry and we look can look forward to an exciting future as the lowest cost renewable energy at the forefront of the transition to a net-zero economy.

The association does fantastic work. It has kept the voice of the industry alive and works tirelessly to support members through difficult times. And soon, the association is evolving to better serve its fantastic member businesses to flourish in the new era ahead. To borrow from an old advertising slogan, the future is bright; and the future is very much solar.

Edited by Jack Dobson-Smith
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www.solarenergyuk.org

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2020's highlights

We put in considerable effort to secure remuneration for small-scale solar generators following the closure of the export tariff. Today solar owners can receive up to 11p/kWh through the SEG.

Smart Export Guarantee kicks in



JANUARY

Extensive lobbying contributed towards a Government decision to make Pot 1 technologies eligible for clean power auctions again. The next allocation round will take place in 2021.

Solar made eligible for CfDs



MARCH

Business Secretary Alok Sharma formally approved plans to build the 350MW Cleve Hill Solar Park in Kent. The park will feature battery storage and through considered land management will produce a 65% biodiversity uplift.

UK's largest solar park approved



MAY

As a result of industry efforts on the issue, battery storage is no longer subject to Nationally Significant Infrastructure Planning rules, enabling larger projects to be developed under local planning frameworks.

Planning laws relaxed for large-scale storage



JULY

Following an industry appeal an extension to the deadline for pre-registered and pre-accredited solar PV installations was granted to mitigate the impact of COVID-19.

FIT validity period extended



SEPTEMBER

We showcased best industry practice in development, O&M and asset management at our annual Solar Quality event, including the publication of comprehensive new guidance on the maintenance of rooftop solar.

Best industry practice showcased



NOVEMBER

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Joint membership benefits announced with MCS

We revealed a generous offer to installers to help kickstart the year, with membership discounts and certification credits available to all installer members.

UK solar peak generation record broken

Optimal weather conditions contributed to a record-breaking generation peak of 9.68GW at 12:30 on April 20. High solar outputs helped deliver a record coal-free period spanning more than 60 days.

CCC recognises solar role in green recovery

Solar was correctly identified as a key contributor to a green economic recovery in the Committee on Climate Change's annual report to Parliament. We had engaged with the committee in the weeks prior.

Solar thermal included in Green Homes Grants

The Government announced the inclusion of solar thermal in the Green Homes Grants scheme for residents. Both thermal and PV are eligible under the local authority component.

Coalition calls for solar rates reform

We led a coalition of business associations in calling on the Chancellor to provide business rates exemption for onsite renewable technologies.

Solar pipeline grows to over 13GW

There is a vast array of ground-mount projects in various stages of planning. More than half of projects in the pipeline sit at 49.9MW in scale.



Solar parks offer cheapest power

New forecasting published by the Department for Business, Energy and Industrial Strategy places solar as the cheapest source of new power generation for the coming years. Between 2025-2040, solar parks will be more cost effective than offshore or onshore wind, gas, nuclear and other technologies.



Residential solar bounces back

Following a period of uncertainty brought about by the coronavirus crisis, the residential market has grown by 33% in Q3 compared to pre-pandemic levels in March. More than 4000 systems were installed in October compared to a low of just 500 in April.

PPAs continue to drive growth

Major power purchase agreements have driven deployment this year, with corporate deals already accounting for over 200MW in the UK. To support growth, three RE-Source UK virtual events were held this year, gathering over 250 buyers and sellers from the technology, food and drink, and local authority sectors.



Smart solar can flatten peak demand

This year we compiled a groundbreaking new report featuring pioneering research by CREST at Loughborough University which reveals that installing solar PV, battery storage and intelligent energy controls in 4.4 million homes would deliver enough grid flexibility to flatten peak demand. The analysis was produced in partnership with Advance Future Energy.





The year ahead

Chris Hewett, Chief Executive

Solar energy in the UK has reached a tipping point for sustained growth over the rest of this decade. Our sector has shown great resilience throughout the pandemic and I firmly believe that by 2030 the UK will have at least 40GW of solar capacity installed. We will publish a report in early 2021 on how this vision can be achieved.

As the industry enters a new era, we are taking a new name and a new look to help us create those partnerships for industry growth. Our new identity, Solar Energy UK, reflects our diverse and growing membership of more than 230 companies. We will continue to represent and showcase the whole value-chain of solar power, heat and storage.

"We will continue to work with energy buyers to stimulate solar uptake."

Corporate and public sector energy procurement is helping to drive growth. Next year, we will be working with techUK to promote opportunities to their 800 member companies, as well as addressing the role of data technology, alongside working with other proactive sectors, including water, which has recently committed to deliver up to 3GW of onshore renewables by 2030.

Next year will see solar projects compete in a CfD auction for the first time in six years, with the promise of more to come. This will further help stimulate the solar. Not all investors will rely on long-term contracts, however, the anticipated growth of flexibility markets will create other revenue streams for zero-carbon technologies including energy storage.

Solar plays a vital role in addressing the climate emergency, naturally, and there's growing evidence of solar parks using good land management to create opportunities for nature recovery. We will be working closely with ecologists to promote best practice within our membership.

"We will show how retrofitting a home with solar can drive positive financial value."

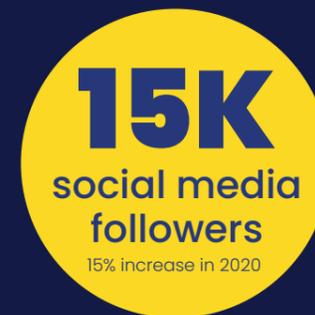
The residential market showed great resilience in 2020, and the combination of new building regulations and the extension of the Green Homes Grant to solar could drive significant growth. Our flagship research project in 2021 will collate evidence of how retrofitting a home with solar, energy storage and other zero-carbon technologies, can drive financial value.

We will also be doing more to engage the finance sector. In partnership with the Green Finance Institute, we will develop a confidence checklist for finance providers to help consumers manage the upfront investment to create smart solar home via green mortgages and other products.

In the 2010s, this industry needed Government support. The 2020s will see solar, energy storage and other renewables gain more independence and flourish.

That is how Solar Energy UK, relaunching in advance of COP26 and a major year for climate action, will help the sector triple solar capacity to 40GW in a decade.

Our 2020 in numbers



Meet the team



Cherry Parker
Business Development

- Business Opportunities
- Membership Services
- Local Authorities
- Partnerships

cparker@solarenergyuk.org



Cameron Witten
Policy

- Solar Parks
- Asset Management
- Networks and Grid
- Energy Storage

cwitten@solarenergyuk.org



Jack Dobson-Smith
External Affairs

- Media Engagement
- Crisis Management
- Lobbying
- Digital Communications

jdobson@solarenergyuk.org



Kevin McCann
Policy

- Solar Roofs
- System Maintenance
- Smart Homes
- Micro-Grids

kmccann@solarenergyuk.org



Kara Davies
Business Engagement

- Membership Support
- Events and Webinars
- Renewals
- Welsh Affairs

kdavies@solarenergyuk.org



Rachel Hayes
Policy

- Natural Capital
- Emerging Technologies
- Solar Heat
- Scottish Affairs

rhayes@solarenergyuk.org

Working group activity

Our working groups provide a valued opportunity for members to have in-depth discussion about shared problems and work together to influence government policy. We currently have nine working groups with each typically meeting three times a year.

Over two thirds of members agree that our working groups are well organised, deal with the right issues and provide them with ample opportunity to contribute. More importantly, a majority of members agreed the working groups they attend are effective.



PV Rooftop

Chair: Jonathan Bates (Photon)

PV Rooftop group members have helped coordinate evidence and input to our work lobbying the Government on initiatives designed to support the take-up of solar as part of the UK's green recovery from Covid-19. This notably includes the Green Homes Grant, a multi-billion pound scheme designed to help cover the cost of solar for homeowners. The STA's efforts have led to the inclusion of PV in the Local Authority element of the scheme, which was also extended by a year in November 2020. This makes it a much more viable prospect for members should PV be included, which we will continue to push for in 2021.

- **Smart Export Guarantee, with tariffs reaching 11p/kWh**
- **Green Homes Grant local authority component**

Rooftop O & M

Chair: Steve Williams (Clean Solar Solutions)

The Rooftop O&M group produced the first edition of our Industry Best Practice Manual for the operation and maintenance of rooftop solar systems. This one-stop guide provides an overview of key issues which members recommend owners and operators take into account to ensure the safe monitoring, maintenance and cleaning of their solar systems. Doing so can help to prolong system life and ensure maximum return on investment.

- **Produced first best practice guidance for rooftop maintenance**
- **Initiated positive dialogue with the insurance sector**

Small-Scale Storage

Chair: Mike Lanigan (Moixa)

The Small-Scale Storage group has focused on how to build up the domestic battery storage market. This has included estimating the potential to create jobs as part of the expansion of the UK supply chain. We have had several meetings with officials from BEIS on this topic, who have a workstream on removing barriers to domestic storage, and we will continue to feed into this in 2021.

- **Produced Smart Solar Homes Report**
- **Lobbying on domestic storage VAT**

“ It is great to see the group of different companies bringing their expertise and knowledge to ensure safe working practices as a blanket across the industry. ”

C. Silvester
Ecolution



Large-Scale PV

Chair: Matt Black (Solivus)

Three major issues have been the focus of the Large-Scale group this year: the re-inclusion of solar in the Contracts for Difference Scheme, technical discussions around planning and in particular the issue of measuring capacity with regards to National Strategic Infrastructure Projects, and issues relating to ongoing network charging reforms. Each of these issues could have a significant impact on the viability of merchant projects, and the working group has been focused on driving reforms to expand the utility scale market.

- **Solar returned to CfD scheme with increased capacity**
- **Lobbying for fair planning treatment of solar**

O&M and Asset Management

Chair: Will Hitchcock (Above Surveying)

This group has undergone a transformation over the year. Over the period of the first lockdown, this group responded swiftly to help coordinate and communicate industry O&M needs to support continued site operations. Its remit has now been expanded to focus more on issues of technical asset management as well as O&M. The STA would like to thank Angus Campbell for his valuable contribution as chair in the first half of the year.

- **Pooled resources across O&M group members during first lockdown**
- **Showcased best industry practice at Solar Quality 2020**

Utility Scale Storage (with Renewable UK)

Co-Chair: Roberto Castiglioni (Ikigai Capital)

The joint Utility Scale Storage group has focused on addressing drivers, barriers and policy reforms needed to facilitate access to flexibility markets and revenues, how to create a level playing field for low carbon storage and flexibility, specifically through advocating for the decarbonisation of flexibility markets. In the coming year the group will also be addressing inter-technology competition and how to further stimulate a growing industry.

- **50MW NSIP threshold for energy storage projects scrapped**
- **Lobbying to increase renewable storage's access to and share of flexibility markets**

Solar Heat

Chair: Dr Richard Hall (Energy Transitions)

This year the Solar Heat group focused on persuading policy makers that it was in the national interest to include solar thermal within the Green Homes Grants scheme and pushed for an extension to the NDRHI in light of the imposed COVID-19 restrictions.



- **Solar thermal included in entire Green Homes Grants scheme**
- **Non-Domestic RHI and GHG schemes extended to March 2022**

New Build

Chair: Paul Hutchens (Eco2Solar)

One of the major policy issues the New Build group has worked on in 2020 are the Government's intended changes to planning law and building regulations. With a Government target of 300,000 new homes to be built each year, the automatic inclusion of onsite generation capacity in new build homes – which in many cases would mean solar power – could create a huge market for the solar industry by default.

- **Submitted detailed evidence on energy standards in new homes**
- **Provided insight and analysis on potential market growth**

Local Authorities

Chair: Matt Sandell (GRIDSERVE)

This year the Local Authorities group has shifted its focus towards producing comprehensive guidance for councils looking to invest in solar and energy storage. This is expected to include understanding how to navigate power purchase agreements, utilising procurement frameworks and deploying solar on social housing and public sector estate. The group was pleased with the announcement of the £2billion Public Sector Decarbonisation Scheme which will support the uptake of renewable energy technologies across the country.

- **£2billion Public Sector Decarbonisation Fund**
- **Webinars on public sector procurement frameworks and tender schemes**

Natural Capital

This group was established in July 2020 to provide advice, support and guidance in the enhancement of natural capital within the solar industry. The group's main objectives for the year ahead are to work towards a certification/accreditation standard and to develop a Natural Capital Industry Best Practice Manual, with a view to launching this in Q3 2021. Additionally, the group will work towards achieving a greater public understanding of solar's synergy with biodiversity through concerted stakeholder engagement.



- **Best practice in land management guidance**
- **Developing a biodiversity scorecard**

“

The association covers a very broad range of solar topics in great depth, reflecting the important issues impacting the industry.

”

J. Stokes
GRIDSERVE

Scotland

Chair: Thomas McMillan (Savills)

This year the Scotland group focused on supporting members north of the border to navigate the challenge of COVID-19, with the devolved Scottish government applying rules distinct from other UK administrations. It praised the extension of the Home Energy Scotland scheme, which provides interest-free loans for green home improvements including solar PV and thermal, to feature a cashback reward of up to 75%, with further details expected in due course.

The group also spent this year finessing policy asks across several key areas, including non-domestic rates, planning and new building standards, with a view to expanding engagement with Scottish Government and other key stakeholders in the new year, building on the dialogue established with Energy Minister Paul Wheelhouse, among others.

After three years at the helm, Chris Clark (Emtec Energy) will be stepping down as Chair of the Scotland group. Thomas McMillan (Savills) will be taking his place, and Josh King (AES Solar) will take on the role of Vice-Chair. The group would like to extend its thanks to Chris for his efforts and commitment.

- **Extension of the Home Energy Scotland scheme**
- **Solar statement by Energy Minister Paul Wheelhouse at All-Energy 2020**

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Our members' achievements



| | |
|--|--|
| Most solar PV installations Eco2Solar | Most solar thermal installations AES Solar |
| Biggest private sector PPA Low Carbon 150GWh deal secured with Tesco | Biggest public sector PPA Volitalia Deal secured with City of London |
| Largest merchant risk solar park built Next Energy Capital 50MWp - Staughton Solar Plant | Largest solar park approved Hive Energy 350MWp - Cleve Hill Solar Park |
| Most technologically advanced solar park GRIDSERVE York Hybrid Solar Farm - bifacial solar modules and single-axis sun tracking | Largest battery park built Gresham House 75MWh - Thurcroft, South Yorkshire |

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Our members' views



of our members agree that this is the MUST-JOIN trade association for solar energy.



of our members would recommend membership to other companies.

This year our members gave us top marks for

- Providing business critical information in a timely manner (72%)
- Responding swiftly and appropriately to new matters arising (78%)
- Representing your business concerns to government and regulators (66%)

What our members value most

- 1 In-depth discussion about shared problems in working groups
- 2 Bulletins and webinars providing market news and insights
- 3 Working together to influence policy makers

Among other things, our response to the coronavirus crisis was praised:

“ Very impressed by the way the association stepped up its webinars during COVID-19. ”
D. Harris
Bright Renewables

“ Keeping updates and useful information flowing through the lockdowns. ”
M. Quatraro
Gravis Capital

“ Communication has been frequent and informative over a challenging year ”
P. Roberts
BSR O&M

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With over 20 years of experience, we are one of the leading ecological consultancies in the UK with a particular specialism in the survey, assessment and monitoring of large, and small scale PV arrays. Our team of expert ecologists provide the full range of ecological survey and consultancy services in respect of planning and land management.

We invest time and energy into better understanding how PV arrays can achieve best results for biodiversity and collaborate with academic institutions and industry partners to conduct pioneering research into the effects and benefits of solar arrays. This includes publication of our annual report 'Solarview' on the outcomes of ecological monitoring studies completed that year. To date Solarview has presented the collated results from over 100 different solar arrays from across the UK.

If you would like to know more about the monitoring surveys we conduct, or if you are promoting a new solar site, please get in touch with Tom, Belinda or Hannah about how we may be able to assist you.



Medium Consultancy of the Year



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T: 01934 712500

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A warm welcome to all of our new members in 2020

| | | | |
|-----------------------------|----------------------------|------------------------------|------------------------------|
| AceOn Group | GoodWe | Pearl Safety Solutions Ltd | Terrapinn |
| Anglo Renewables | Green Power Systems Ltd | Pearl Training Solutions Ltd | Trust Renewables Ltd |
| Black Mountain Developments | Greentech Services Limited | Pinsent Masons | Watt Energy Saver |
| Clarkson and Woods Ltd | Ineco Energy | PKsolar | Weightmans LLP |
| EcoPartners | Infinis | Push Energy | Wild Power |
| Encome Energy Performance | JA Solar | Roythornes Solicitors | Wokingham Borough Council |
| Ethical Power Connections | LHW Partnership LLP | SCS Groundcare Ltd | Yorkshire Energy Systems Ltd |
| Eternity AG | Mowland Ltd | Steag Solar Energy Solutions | Zenigo Ltd |
| Falck Renewables | Nerfsky | Solarkinetics Ltd | |
| FIMER UK | Olympus Power | Solarport Systems Ltd | |
| | Pathfinder Clean Energy | Statkraft | |

Thank you to all those who renewed memberships in 2020

| | | | |
|----------------------------|----------------------------|-----------------------------|----------------------------|
| 33kv | Elgin Energy Ltd | Lightsource BP | Solar Consulting |
| Above Surveying Ltd | Emtec Energy | Little Green Energy Company | SolarEdge |
| Active Building Centre | Energi North East | Locogen Energy Servies Ltd | Solar Farm Cleaning |
| AES Solar | Energy for London | Logan Installations | Solar Green Ltd |
| AlSi Consulting Limited | Energy Transitions | Logic Certification Ltd | Solar Kingdom Ltd |
| Amberside Energy | EnergyMyWay | Low Carbon Ltd | Solar Shed |
| Amelio Solar Energy | Enlightened Solar Ltd | Marubeni Europower | Solar UK |
| Armstrong Energy Corp | Ennoviga Solar Ltd | Meadowcroft Ltd | Solar2 Ltd |
| Bauder | Environment Logic | Midsummer Energy | Solarsense UK Ltd |
| BayWa r.e | Equitix Ltd | Moixa | Solarwatt |
| Beaufort Asset Managers | Erova Energy | n3rgy | Solein Energy UK Ltd |
| Beba Energy | FES Group | Naked Energy | Soltropy |
| Belltown Power Ltd | Foresight Group LLP | Naked Solar | Sonnex UK Services |
| Blackrock | Forster Energy Ltd | Narec Distributed Energy | Sonnen |
| Bluefield Partners LLP | Four Wood Services Ltd | Natural Power | Stern Energy |
| Bluefield Services | Fronius UK | NES Roofing and Energy | Sun4Net |
| BRE Group | GenFit | Neuville Grid Data Limited | SunGift Solar |
| Bright Renewables Ltd | Gillespie Macandrew LLP | NextEnergy Capital Ltd | Sunpower |
| Brighter Green Engineering | Gowling WLG | Northburn Solar Ltd | Sustainable Bright |
| British Solar Renewables | Gravis Capital Management | Oakapple RE | Tepeo |
| Burges Salmon LLP | Gravitricity | Octopus Investments | Tesvolt GmbH |
| Cambridge Solar | Green Nation | Optisol Services | Tethys Energy Ltd |
| Caplor Energy | Greencoat Capital LLP | Photon Energy | The Small Solar Company |
| CC Solar | Greenshop Solar Ltd | Plentiful Energy | Think Green Partners |
| Ceiba Renewables | Greensolver | Pollock Associates Ltd | Toucan Energy Services |
| CREST, Loughborough Uni | Gresham House Holdings | Powerhug Ltd | Treadlighter Ltd |
| Centrica plc | Gresham House RE VCT2 PLC | Powersun Ltd | Twig Group |
| Chelsfield Solar | GRIDSERVE | Powervault | Ty Pant Renewable Energy |
| Chiltern Solar Ltd | Harvest Green Developments | PSH Operations Ltd | Uavonic |
| Clean Solar Solutions | HBS New Energies | Public Power Solutions | Van der Valk Solar Systems |
| Cubico | Helios O&M Ltd | PV CYCLE aisbl | Vector Renewables |
| DNV GL UK | HIES | Quintas Energy | Vikram Solar |
| Downing LLP | High Voltage Technical Ltd | REEN Performance Energy | Viridian Solar |
| EA Technology | Hive Energy | RES | Voltair Energy |
| Eco Power Innovations | Huawei | Revolution Energy | Voltaia UK Ltd. |
| Eco2Solar Limited | ICB (Projects) Ltd | Ridge Clean Energy | Wagner Renewables Ltd |
| Ecolution | iChoosr | Savills | Waxman Energy Ltd |
| Ecovision Asset Management | Ikigai Capital | SCS Ggroundscare Ltd | Wise Energy |
| Ecovolt | iPower Energy Ltd | Segen | Wychwood Biodiversity |
| Eden Renewables | JBM Solar | Shire Energy Services | Zestec Asset Management |
| Eden Sustainable | John Laing Group plc | Silverstone Green Energy | Zhyphen |
| EDF Energy Renewable | K2 Systems | Solarbarn Ltd | |
| Electricity North West | Kingspan | Solarcentury Holdings | |