A new dawn for UK solar
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 purpose
To catalyse the collective strengths of our members to build a clean energy system for everyone’s benefit

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.

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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 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.
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.

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.

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.

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

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

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

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

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.

We showed our support for the Committee on Climate Change’s annual report to Parliament. We had engaged with the committee in the weeks prior.

We unveiled 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.

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

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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.

Coalition calls for solar rates reform

We led a coalition of business associations in calling on the Chancellor to provide business rates exemption reform 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 made eligible for CFDs

UK’s largest solar park approved

Planning laws relaxed for large-scale storage

FIT validity period extended

Best industry practice showcased

Joint membership benefits announced with MCS

UK solar peak generation record broken

CCC recognises solar role in green recovery

Solar thermal included in Green Homes Grants

Coalition calls for solar rates reform

Solar pipeline grows to over 13GW

2020’s highlights
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.

“Our 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.

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.
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

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

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

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C. Silvester
Ecolution

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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

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

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

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

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

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

J. Stokes
GRIDSERVE
Our members’ achievements

<table>
<thead>
<tr>
<th>Most solar PV installations</th>
<th>Most solar thermal installations</th>
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<tbody>
<tr>
<td>Eco2Solar</td>
<td>AES Solar</td>
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Biggest private sector PPA

Low Carbon
1500GWh deal secured with Tesco

Biggest public sector PPA

Voltalia
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

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

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
A warm welcome to all of our new members in 2020

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

Thank you to all those who renewed memberships in 2020

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