THE CURRENT PERSPECTIVE FOR CSP IN EUROPE

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CONTENT

1. The ESTELA action main lines (how, what, why, what, where)

2. A 3-fold approach to the deployment of CST aiming at bridging:
   - Information to EU institutions (EC EP) on CST globally
   - Specific national policy environment(s)
   - The CSP industry & R&D perspective

3. Preliminary lessons learnt
Promoting the role of CST in both the decarbonisation of the power system and the fight against climate change (that re-introduced the concept of system integration)

At EU level:
- No a priori discarding the technology based on a LCOE approach in statements, studies, cost comparisons, etc.
- No limitation of the concept of system integration to gas & electricity
- Support to relaunch a European home market for CST via
  - Opening financial support blends (CEF, IF,..)
  - Further defend the EU technology leadership via further support to R&D

At national level:
- Novel tendering processes for RES procurement (CO2 free night time energy)
- Use of cooperation mechanisms
- Looking at the contribution of CST for bulk amounts of storage
- Fair cost comparisons with other storage options (P2X, Batteries)
HOW?
Formally, acting today as competence centre of the Implementation Working Group on CSP within the Strategic Energy Technology Plan (SET Plan) of the European Commission,

WHY?
To thoroughly inform European national entities at political, legislative, and institutional level about the impact of solar thermal energy.

WHAT?
Opening doors for the best procurement of CST solutions and achieving increased public funding for close to market CST related R&D activities.

WHERE?
In “relevant” European countries (such as Spain, Italy, Germany, Turkey, France, the Netherlands, Luxembourg, Portugal, etc., that show natural, technological or industrial capabilities for the STE/CSP markets, and/or as potential off-takers.
THE METHODOLOGICAL APPROACH

• Need for manageable RES energy & their respective strategies on its procurement
• Possible (future) changes in the relevant framework conditions

Map & Match
• Contacting national political decision-makers
• Cross-checking with R&I community and other projects/activities

Meeting with national main stakeholders officials
• Preparation of agendas and documents
• Setting up of delegations
• Pre-briefing
• Presentation of potential solutions using STE/CSP

The Outcome
• Media outreach
• country reports
• Events: Joint Industry-R&I events, site visits, EU Coop Event

Analysing and assessing relevant countries’ energy needs & stakeholders
How to decarbonize power generation in Spain?

Electrical decarbonisation in sunny countries cannot happen without a solid contribution of thermal solar energy..

The not explored thermal storage features and cost comparisons with other alternatives...

5 GW new CSP over the next 10 years in Spain would clearly be a game changer for the technology on the electricity side?
Turkey doesn’t “close the door” to CST
Cost remains an essential criteria, but still working towards to assess the ratio cost/value (“LCOE dogma”)
Energy policy sets 3 key conditions for the industry:
- Use of national technological capacities
- Localisation of industrial deployment
- Matching current power system + economy needs on the way to reduce env. footprint
Regulatory and financing reported a high degree of flexibility along the governmental energy policy guidelines, new legislation is in preparation about storage and hybrid projects;
TSO foresee specific storage needs of the power system to accommodate with more VarRES
PRELIMINARY FINDINGS ABOUT PORTUGAL

Ahead of meeting with the DGEG (Secretary of State)...

Main point and ‘strong recommendation’ received so far to see some change in technology choices in Portugal is to present a ‘narrative’ sketching what makes the deployment of CST in Portugal of added value for Portugal’s economy at large, building on the same “trilogy” already heard:

1. Use of Portuguese technological competences
2. Local content provided, benefits for Portuguese companies and workers.
3. Matching the specific needs of the Portuguese power system and/or the needs of Portuguese industry (most probably heat)
4. Progressive deployment program demonstrating 1-3 and increasing the appetite of private investors.
HOW DO MINISTRIES LOOK AT NUMBERS CRUNCHING..

Which are the expected winners (and losers) in each country at macro-economic level:

- among large corporations having a direct impact on policy
- downside business impact (SMEs)
- on R&D entities (if existing)

In case of x-border projects:

- Can a fair balance of benefits in the respective countries be proposed?
- Do cross sector or geopolitical “barter possibilities” exist?

Which is the expected impact on jobs?

- globally
- regionally (especially in case of stressed regions..)
- short term
- longer term
POSSIBILITIES FOR A NEW ACTION FOCUS IN EU FOR CSP?

- More political lobbying at national level?
- Then relayed into EC/EP (and not vice versa..)
- Seek to integrate CSP into main-stream industry lobbying streams
- More pre-commercial cooperation across the CSP industry (cost level info)?
- Refocus R&D capacities on country-based analysis?
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THANK YOU