



# CEO Town hall

19 April 2022





# Agenda

1. Progress in 2021
2. Plan for 2022
3. Industry outlook



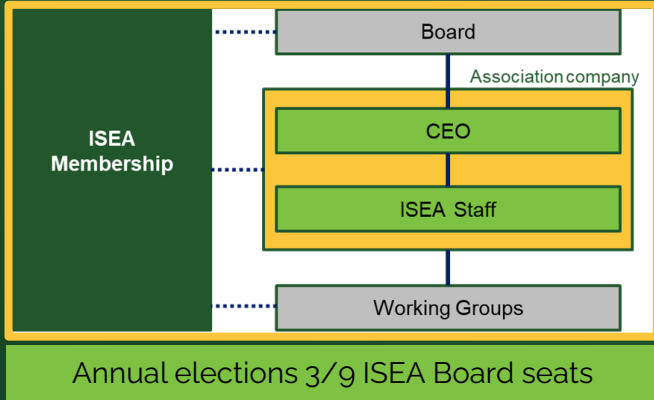
# Progress in 2021

Establishing foundations



# 2021 in review

## Association & corporate governance



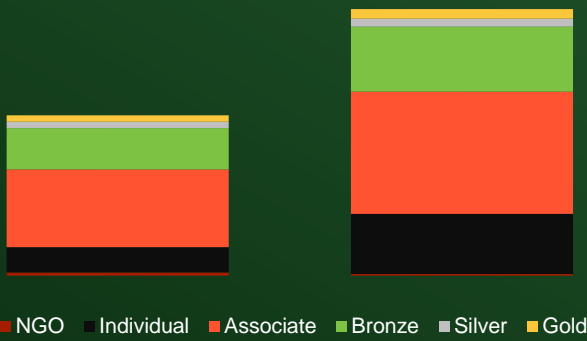
## Step up in association visibility



## Core team



## Membership



## Stakeholders

- CRU
- ESB Networks
- EirGrid
- DECC
- SEM Committee
- DHLGH
- Oireachtas members

## Policy highlights

1. RESS 2 timing
2. RESS 2 Evaluation Correction Factor
3. Microgeneration scheme

# Development areas

<b>Strengths</b>	<ul style="list-style-type: none"> <li>Growing membership</li> <li>Benign perception tech.</li> <li>Pipeline</li> <li>RESS 1 performance</li> <li>Growing coverage</li> <li>Flexibility</li> </ul>	<ul style="list-style-type: none"> <li>Technology understanding</li> <li>Lean resourcing</li> <li>Oireachtas links</li> <li>Regulatory-markets engagement</li> <li>Current deployment</li> </ul>	<b>Weaknesses</b>
	<ul style="list-style-type: none"> <li>Behind the meter</li> <li>RESS 2-4</li> <li>Assets energising</li> <li>Solar in varied settings</li> <li>Hybrid sites</li> <li>Diversify stakeholders</li> <li>Membership development</li> </ul>	<ul style="list-style-type: none"> <li>Connection approach &amp; plans</li> <li>Planning regime</li> <li>Wider perception of solar as "marginal"</li> <li>Costs</li> <li>Slow delivery timelines</li> </ul>	

## Key lessons

- Targeted and evidence-based
- Approaching from perspective of non-industry participants
- Specific calls to action
- Media success linked to surgical placement of stories
- Regular cadence of communication with members

# Plan for 2022

How do we build on year 1



# Policy priorities\*

Policy area	Policy objective
RESS 2	Competition ratio set so that 75% of solar capacity could progress through auction
Capital Acquisitions Tax	Budget 2023 to include language weakening the 50% threshold
Private wires	Amendment in train to delete relevant clause in Electricity Regulation Act
Network charging	CRU Network Tariff Review to favour a shift towards a largely per MWh use of system charging
Shaping Our Electricity Future	Document either not binding, or binds in such a way that 1GW threshold does not become firm. Updated analysis to align with Climate Action Plan 2.5GW figure at a minimum.
Clean Energy Package	Decision given effect in advance of RESS 2
Microgeneration	Focus on implementation of policy and easing of planning restrictions



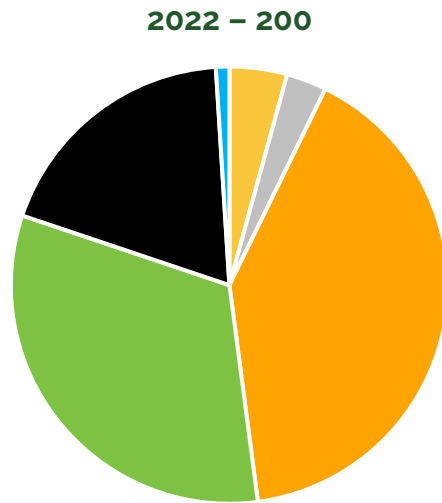
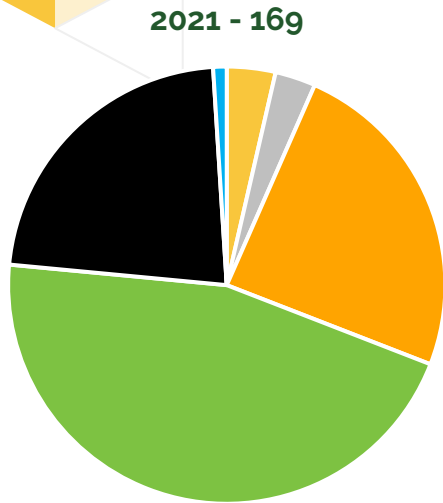
## Building data to support lobbying

1. Solar data survey
2. Residential rooftop research
3. Consumer focused information sheets
4. Under consideration (subject to budget)
  - a. Update planning best practice
  - b. Grid project – likely planning standards
  - c. C&I/non-residential rooftop





# Developing membership offering



- Reviewing benefits – increase value to existing members
- Reviewing membership tiers
- Grateful for member views**

# External engagement

## Stakeholders

Deepening and expanding relationships with specific categories of stakeholder e.g. regulators, Oireachtas members, Governmental departments, local authorities, C&I customers.

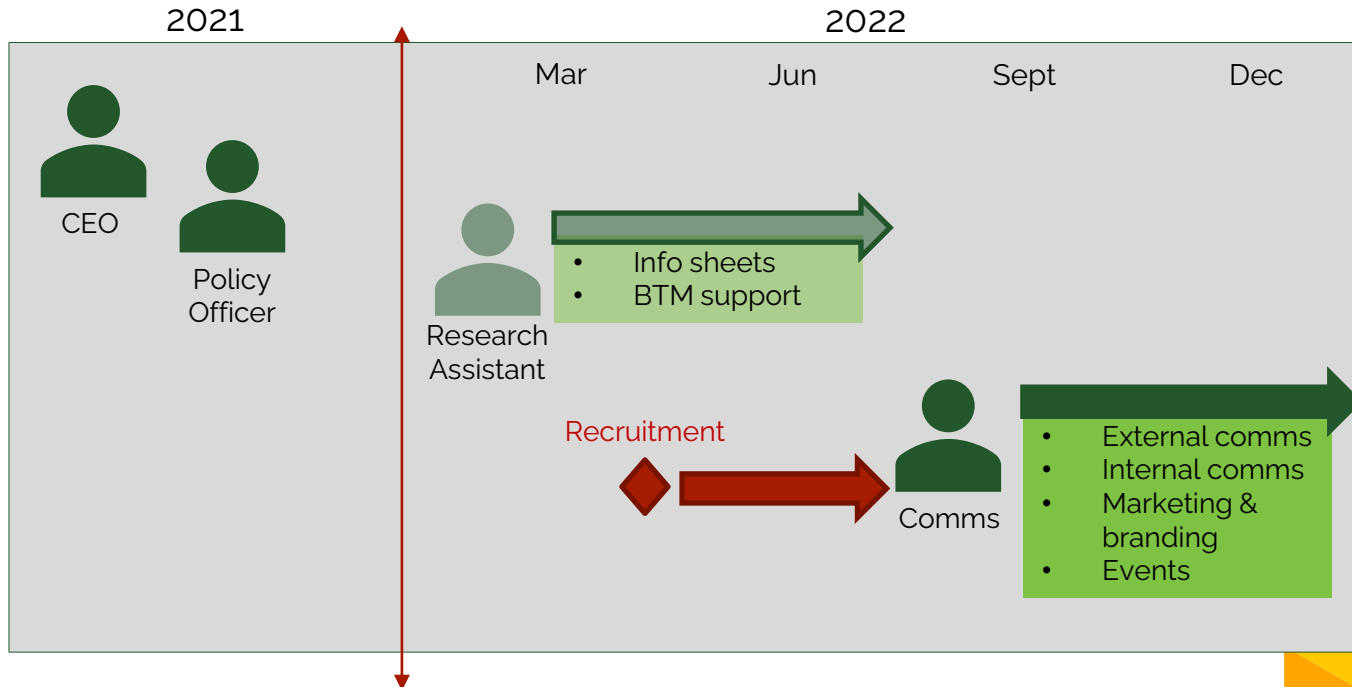
## Media

Lifting the industry's profile and visibility. Solar-related stories appearing in more media sources on a more regular basis. Diversifying the types of media in which ISEA and solar appears.

## Communications

More frequent drip feed of communications to the wider world. A steadier drumbeat of our messaging and building visibility across a range of settings.

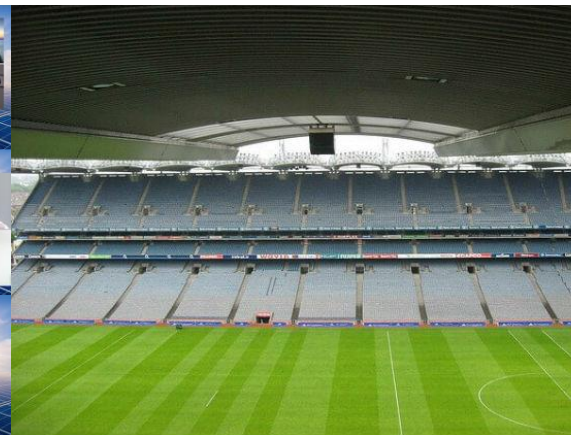
## Resourcing – reviewing requirements





# SOLAR IRELAND 2022

CROKE PARK | 13TH OCTOBER



□ Agenda coming soon

[Registration open](#)



## Association leadership and governance

- Board elections & AGM  
November
- EGM in May/June due  
to change in financial  
year

Your association needs you!

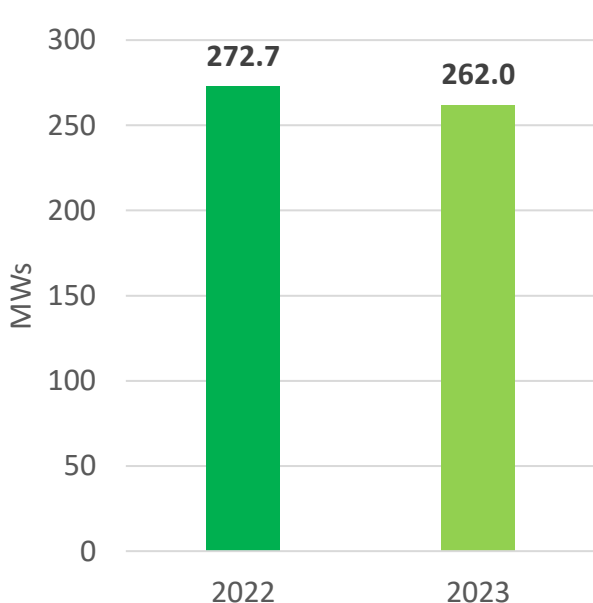


# Outlook

Where is the industry going?



## Solar RESS 1 – project delivery status



	MWs	Projects
Progressing	534.62	32
50:50	28.94	6
Not progressing	185.45	14
Unclear	47.29	11
<b>Total</b>	<b>796.3</b>	<b>63</b>

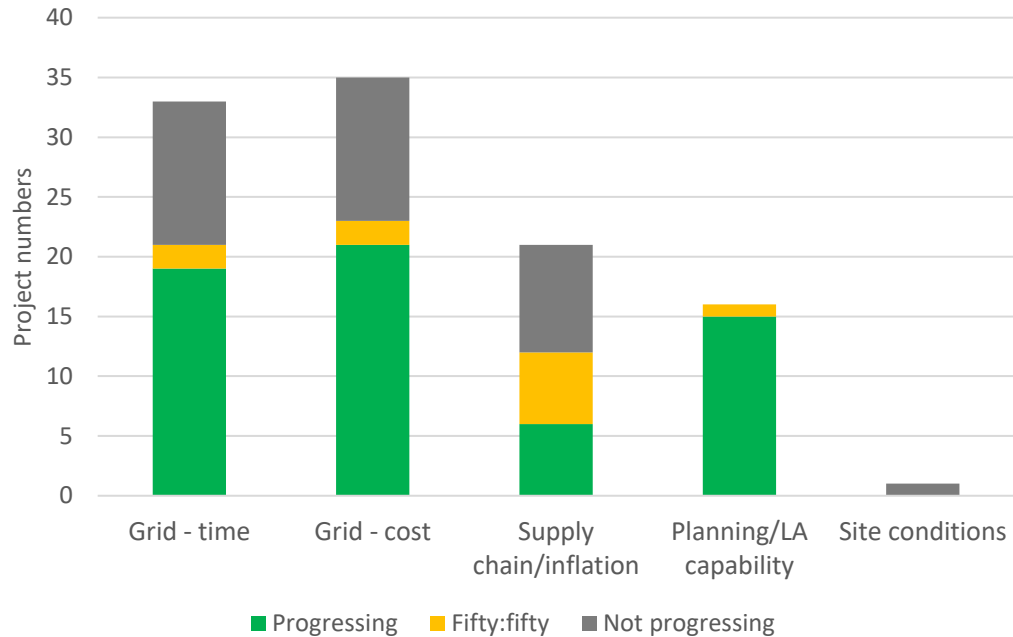
- Survey of 52 projects or 94% of awarded capacity in first half of February
- Issue no. 1 reported across projects related to either grid cost or timelines



## Breakdown of issues across projects

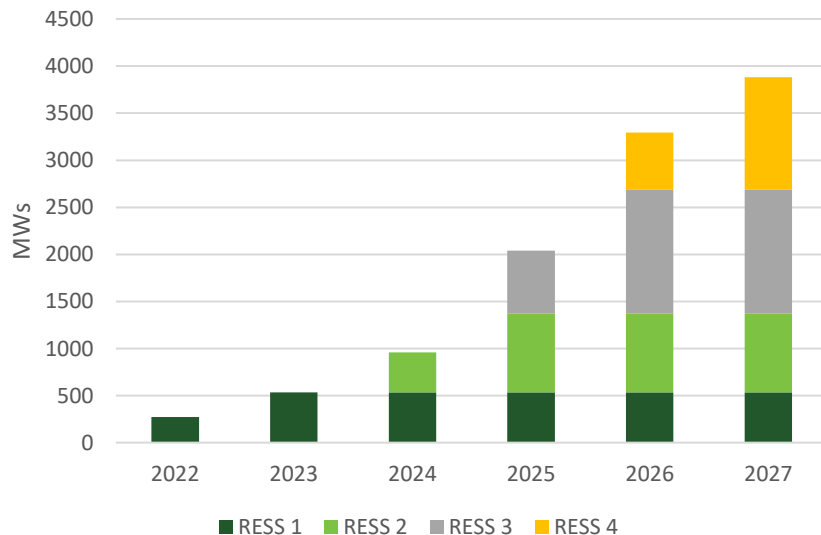
### Projects not progressing note:

- Deviations from offer price
- Unviable cable routes due to planning standards
- Offer dates beyond RESS delivery dates





# Outlook



- Assuming RESS 1 proportion of awarded capacity, attrition rate and delivery timelines
- Varying all these nos. arrives at conclusion: policy underestimates the technology

## Next year:

- Solar data survey;
- Rooftop figures included

## 2022 policy developments

- RESS 2
- Clean Export Guarantee
- Small Scale Solar
- Rooftop planning
- Private wire consultation
- European Commission
  - Solar policy
  - Permitting
- Clean Energy Package
- Budget 2023
- CPPA policy
- Shaping Our Electricity Future v2



2022 is the breakout year  
for solar in Ireland

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