

Insights, Opportunities and Challenges in a Changing Community Energy Landscape



Banister House Solar

Community Energy

State of the Sector 2019

Community Energy Overview

1.96 MW

Heat Generation
Capacity

£978,000

Community Benefit Spending
in 2018

168 MW

Electricity Generation
Capacity

Generating enough
electricity to supply
64,000 UK Homes



29

Low Carbon
Transport projects

92

Communities Improving Local
Energy Efficiency

33

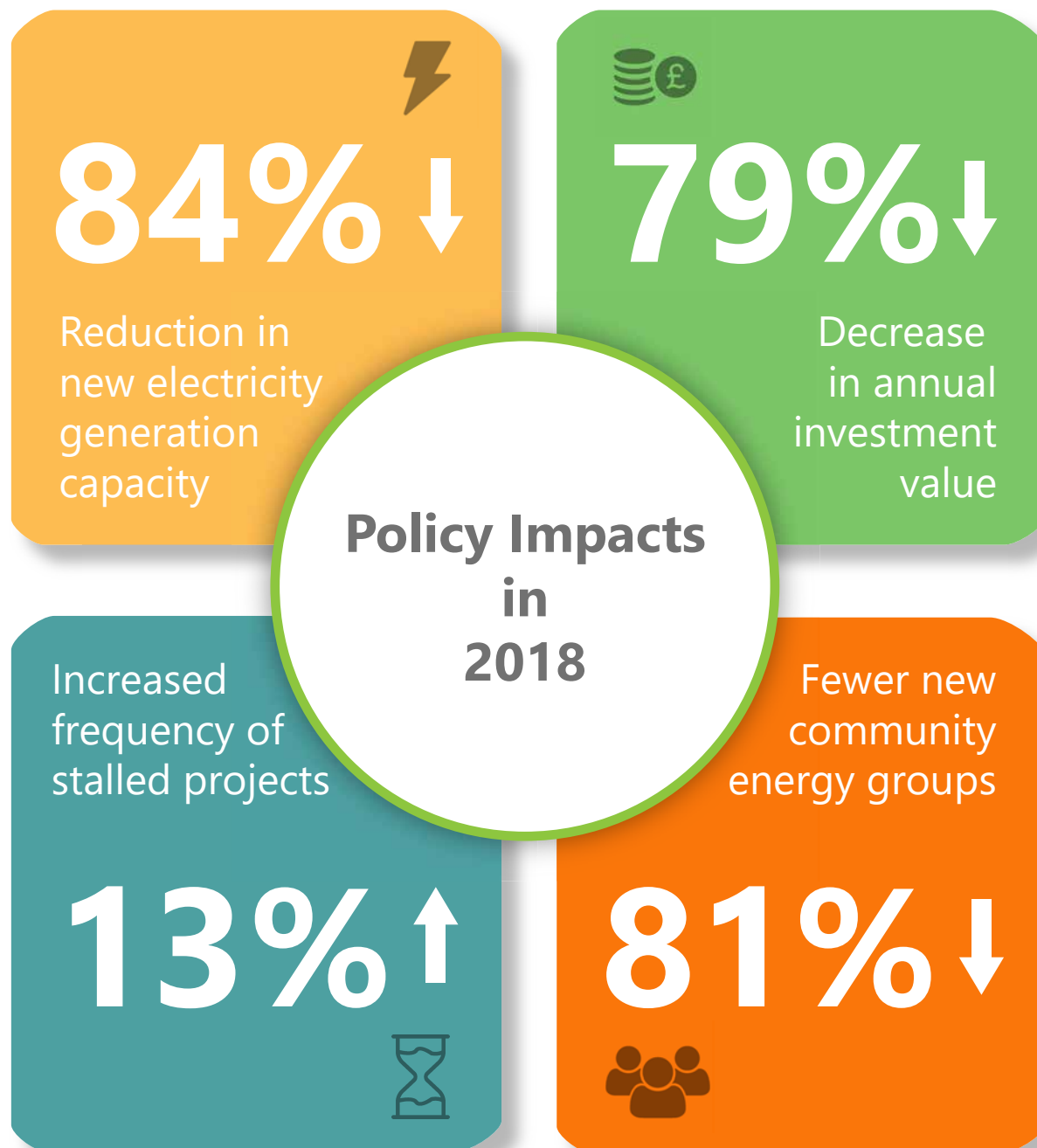
Energy Storage
Projects

Community Energy State of the Sector 2019

Policy Impacts in 2018

"[We need a] focus on building new capabilities and markets in the context of local energy supply, flexibility services and testing the potential for subsidy free Solar PV project development."

"We have accepted that we will not undertake any further generation projects in the current policy climate. We will concentrate on improved energy efficiency and tackling fuel poverty."





Community Energy State of the Sector 2019

In 2018, Successes in the Community Energy Sector Included....

Successes in 2018



7.9 MW

Electricity Generation
Capacity Installed



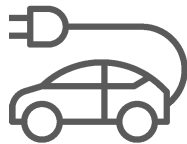
144 kW

Heat Generation
Capacity Installed



33

Communities involved in
Energy Storage Projects



29

Communities involved in
Low Carbon Transport Projects



92

Communities delivering
Energy Efficiency projects

Community Energy State of the Sector 2019

2018 Project Focus



North Kensington Community Energy

Supported by umbrella group Repowering London, North Kensington Community Energy launched its first community-owned renewable energy enterprise in 2018. The project comprises an 86 kW-peak solar panel system, installed across the rooftops of 2 primary schools and a local community centre. Over its 20-year lifetime the solar panels will generate a community fund of £28,000, used for the benefit of local groups, to support educational initiatives, work experience, and more.



CORE Partners & Yealm Community Energy

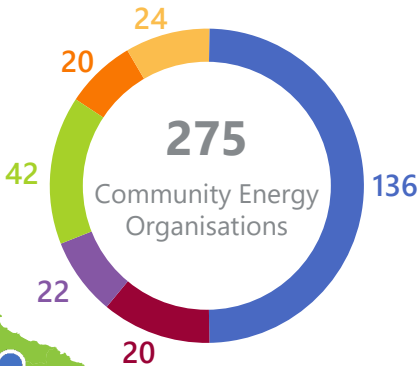
Community Owned Renewable Energy (CORE) Partners is a £40m investment programme funded by Big Society Capital and Power to Change. In partnership with community energy organisations, it acquires solar assets across England, to be restructured for community ownership and income. In January 2017, CORE acquired a 5MW solar farm near Plymouth on behalf of Yealm Community Energy, which generates enough renewable electricity to power 2000 homes.

Within 3 years, Yealm will take entire ownership of the project. Over its lifetime the solar farm is expected to generate approximately £1.4 million for its community-owned fund and has already distributed £20,000 to local causes.

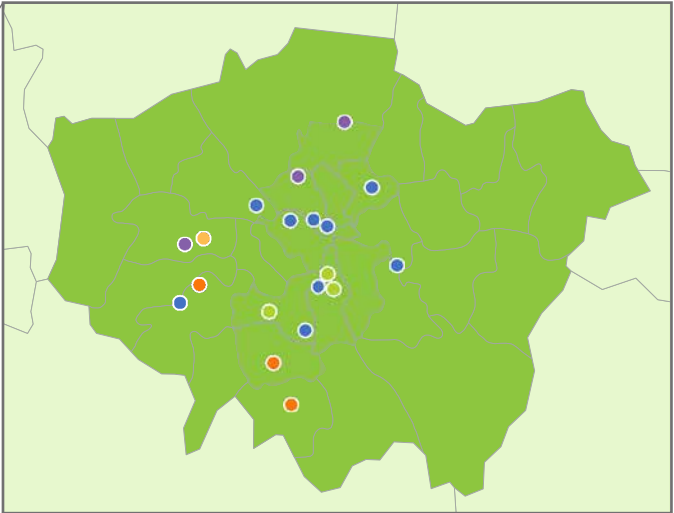


Community Energy

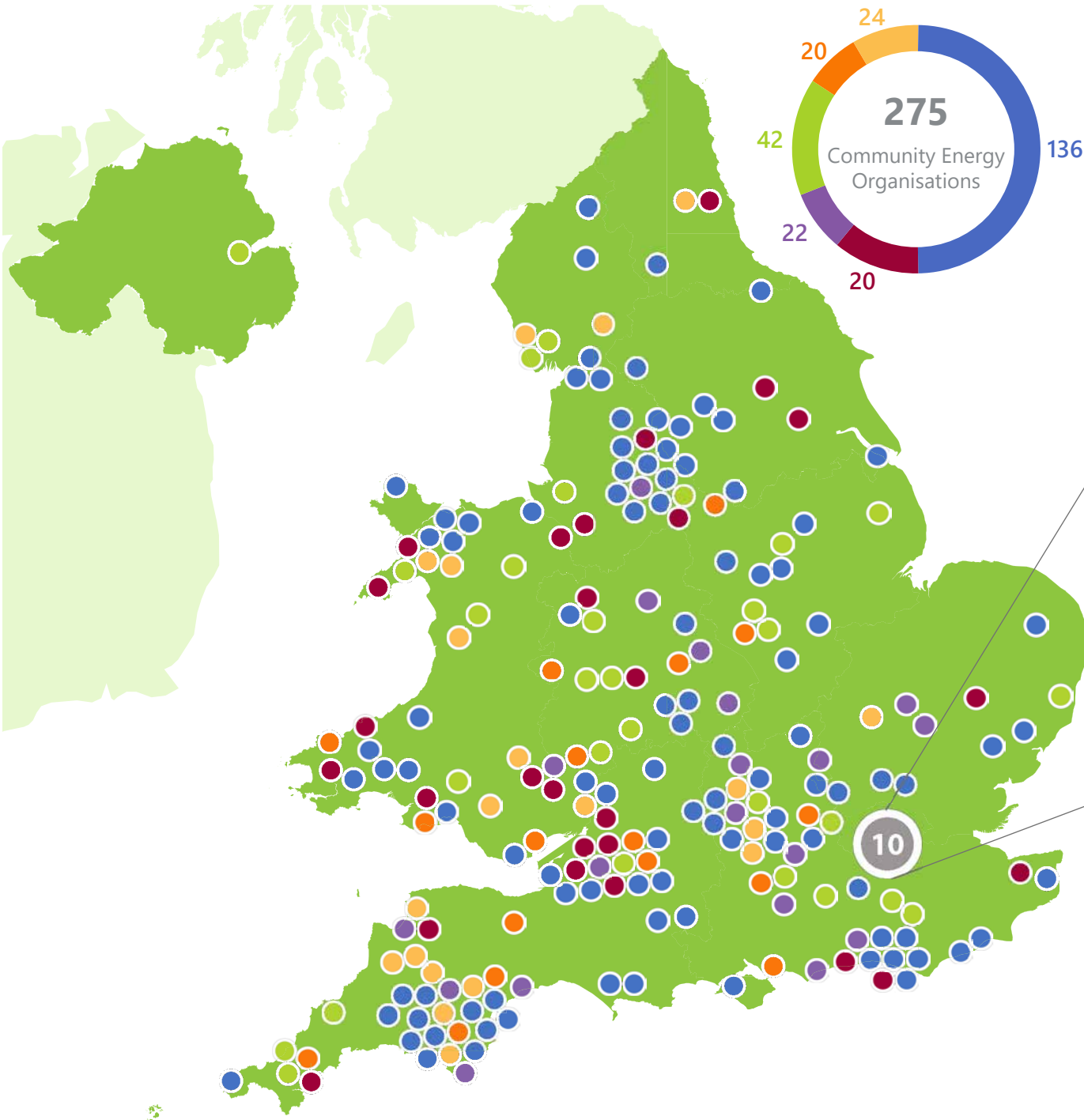
State of the Sector 2019



Community Energy in England, Wales and Northern Ireland



- Co-operative
- Community Interest Company (CIC)
- Community Benefit Society
- Unregistered / Unincorporated
- Charity
- Other





Community Energy State of the Sector 2019

In total community energy organisations
were found to have....

People & Communities

205



Full-Time
Employees

46,000



Members

68,000

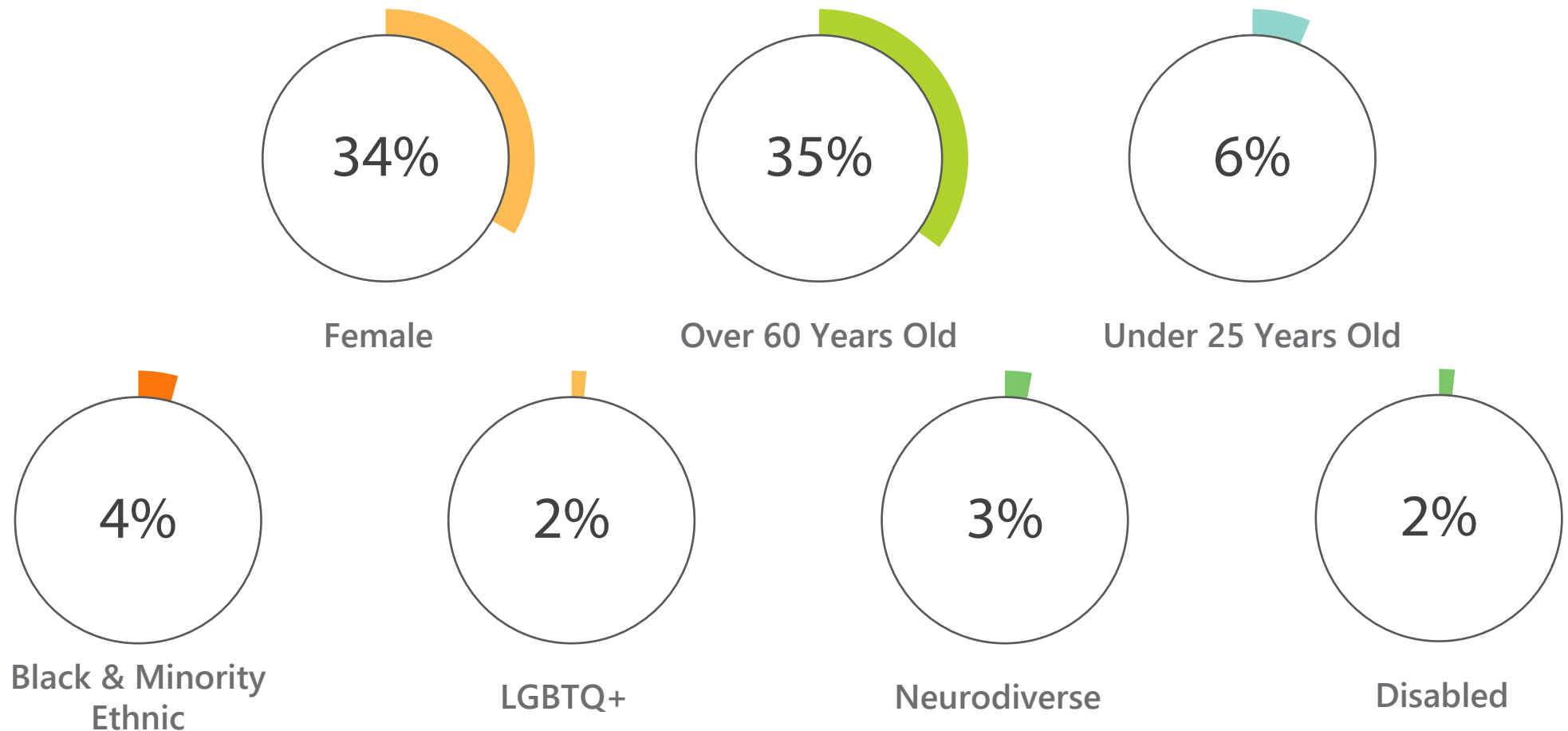


Mailing List
Members

Community Energy State of the Sector 2019

On average community energy organisations members and volunteers were found to be...

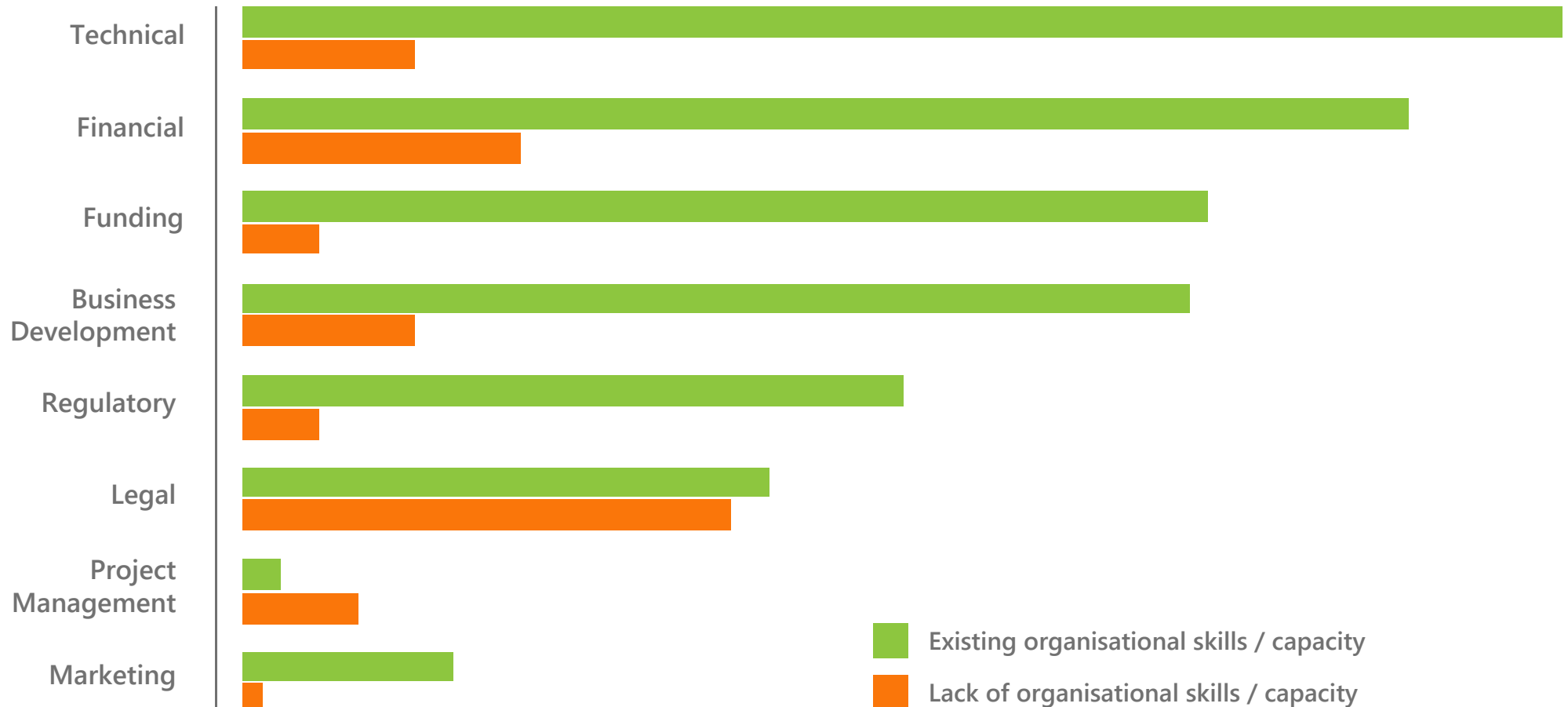
Diversity & Community Energy



Community Energy State of the Sector 2019

Communities were found to have access to a diverse variety of skills and experience, including...

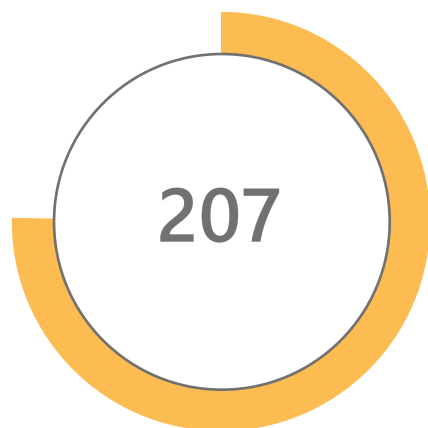
Organisational Capacity



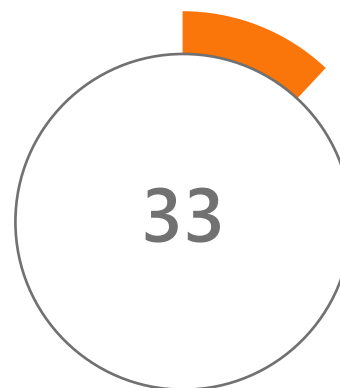
Community Energy State of the Sector 2019

Communities are involved in a number of low carbon activities, including...

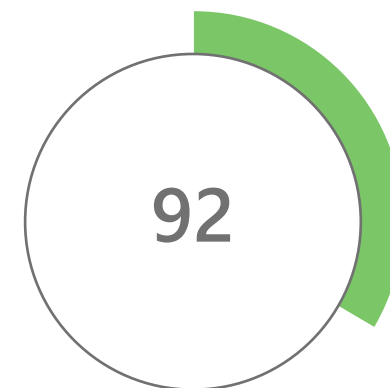
Low Carbon Activities



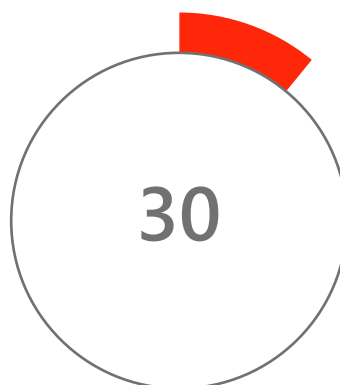
Electricity Generation



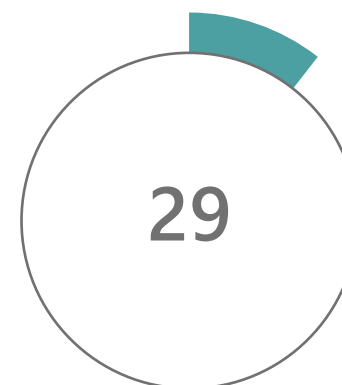
Energy Storage



Energy Efficiency



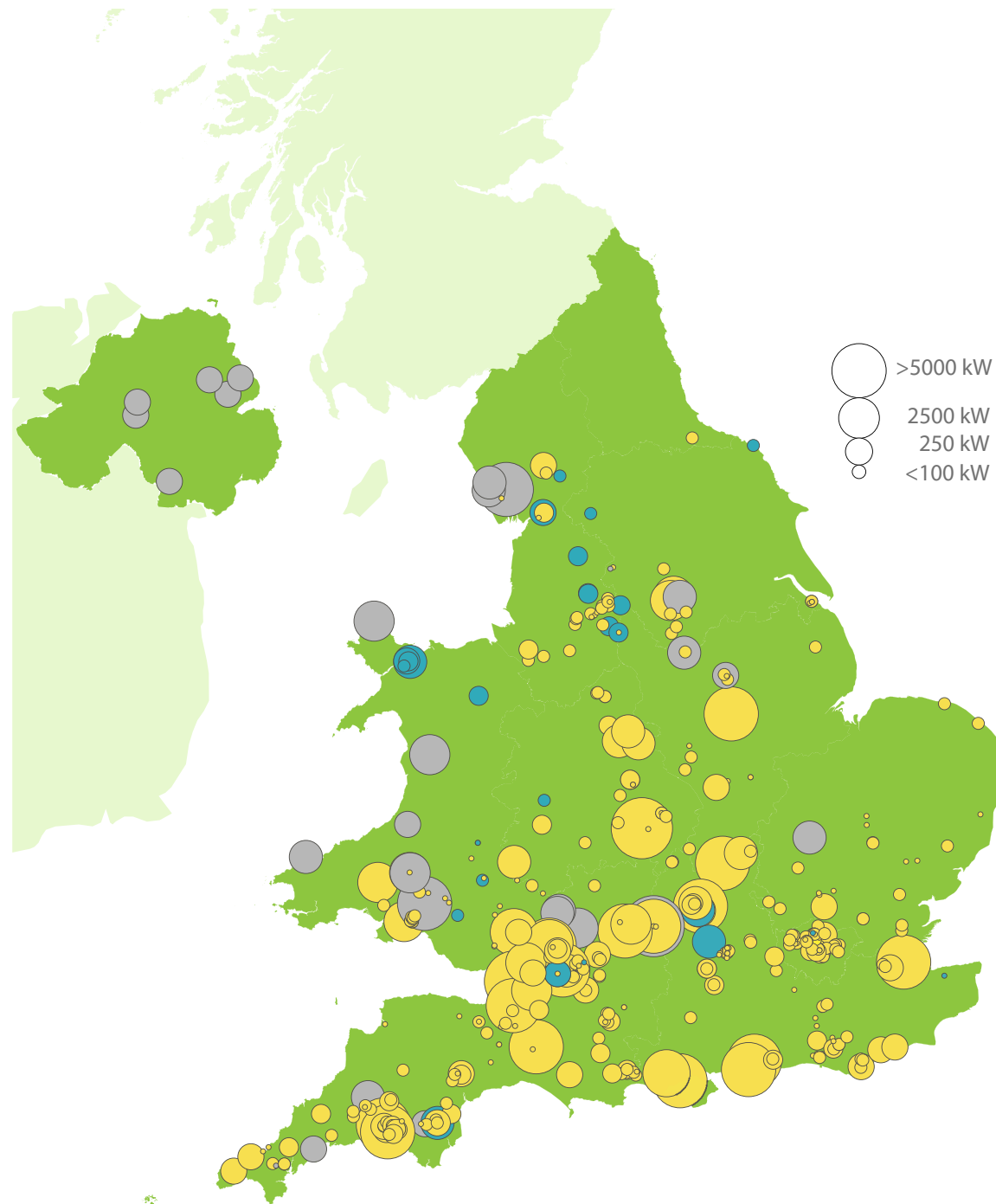
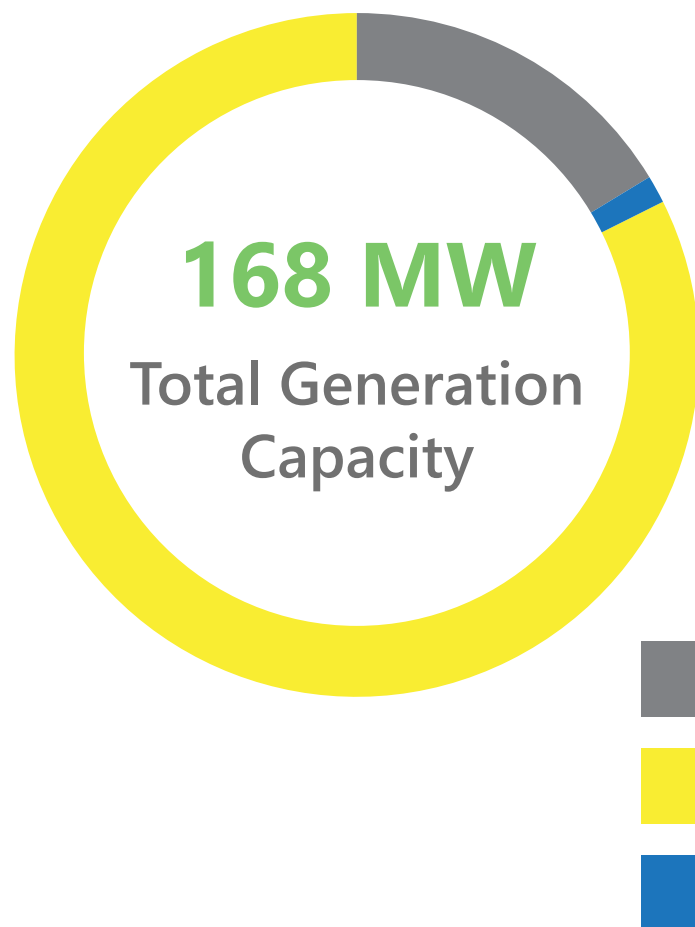
Heat Generation



Low Carbon Transport

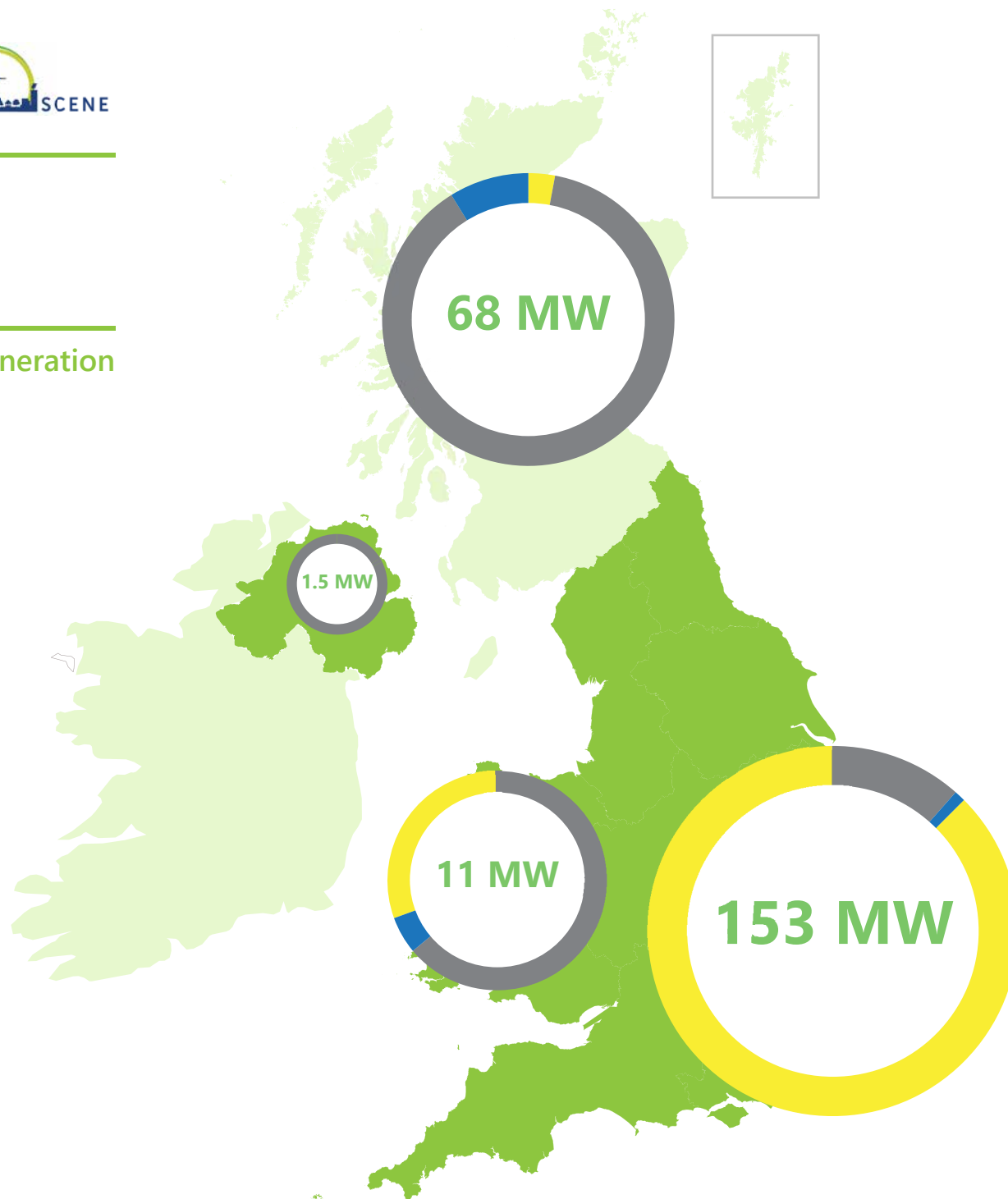
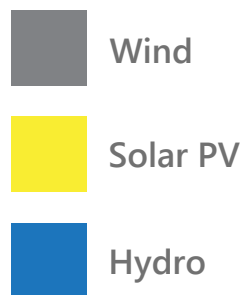
Community Energy State of the Sector 2019

Electricity Generation



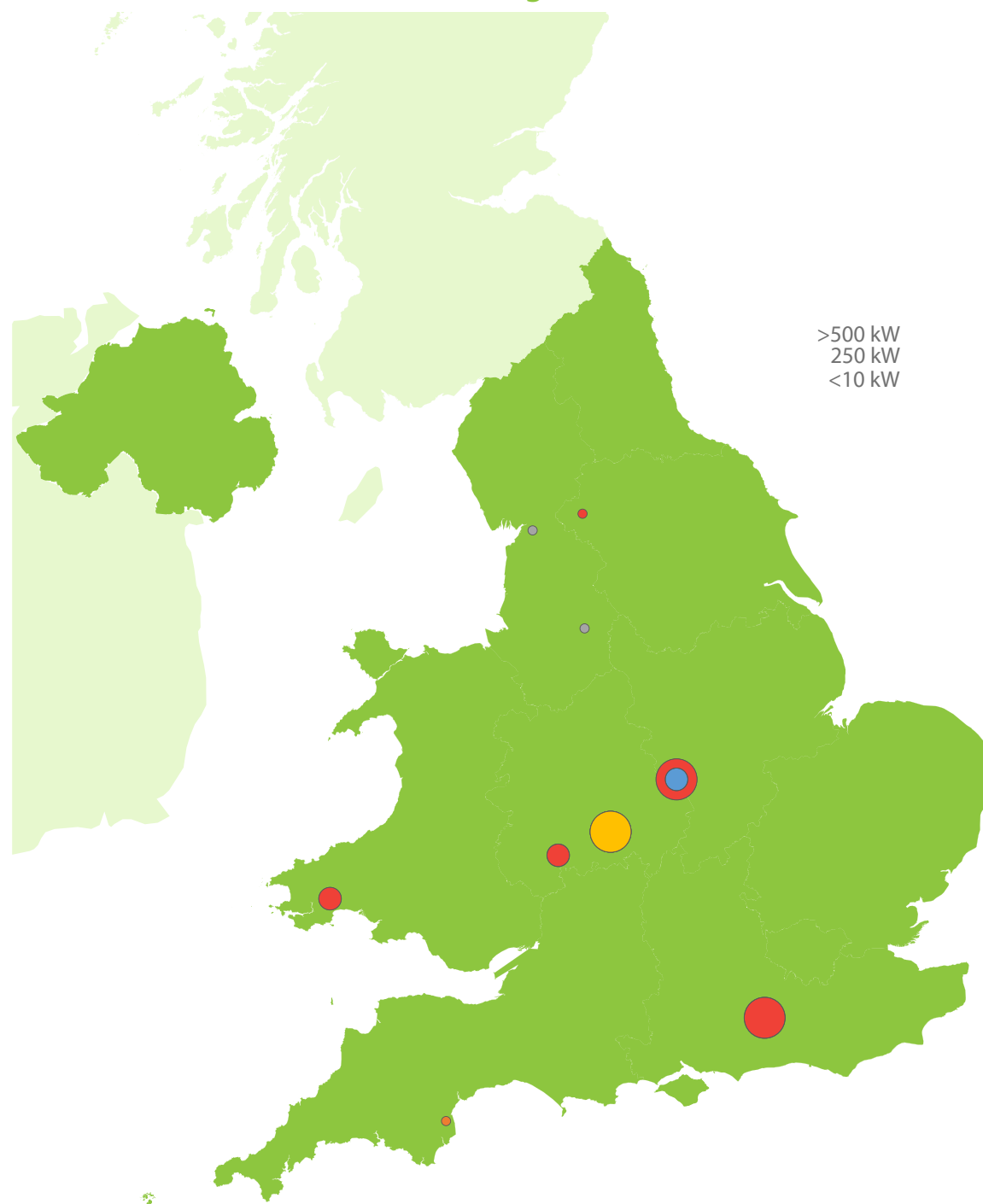
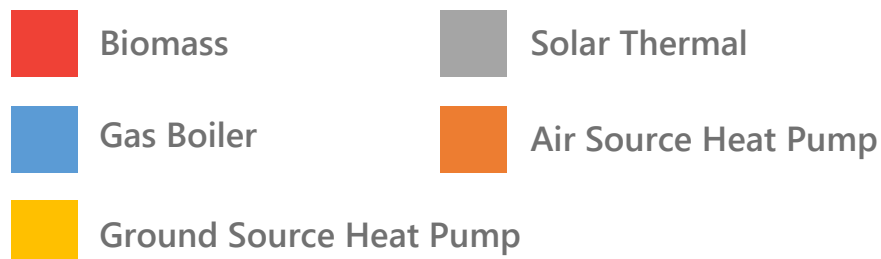
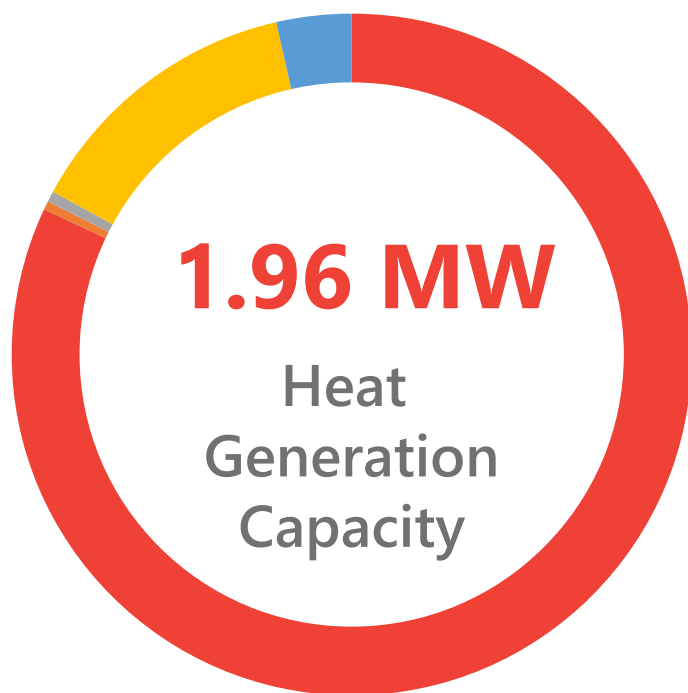
Community Energy State of the Sector 2019

UK Electricity Generation



Community Energy State of the Sector 2019

Heat Generation



Community Energy State of the Sector 2019

Energy Storage



33

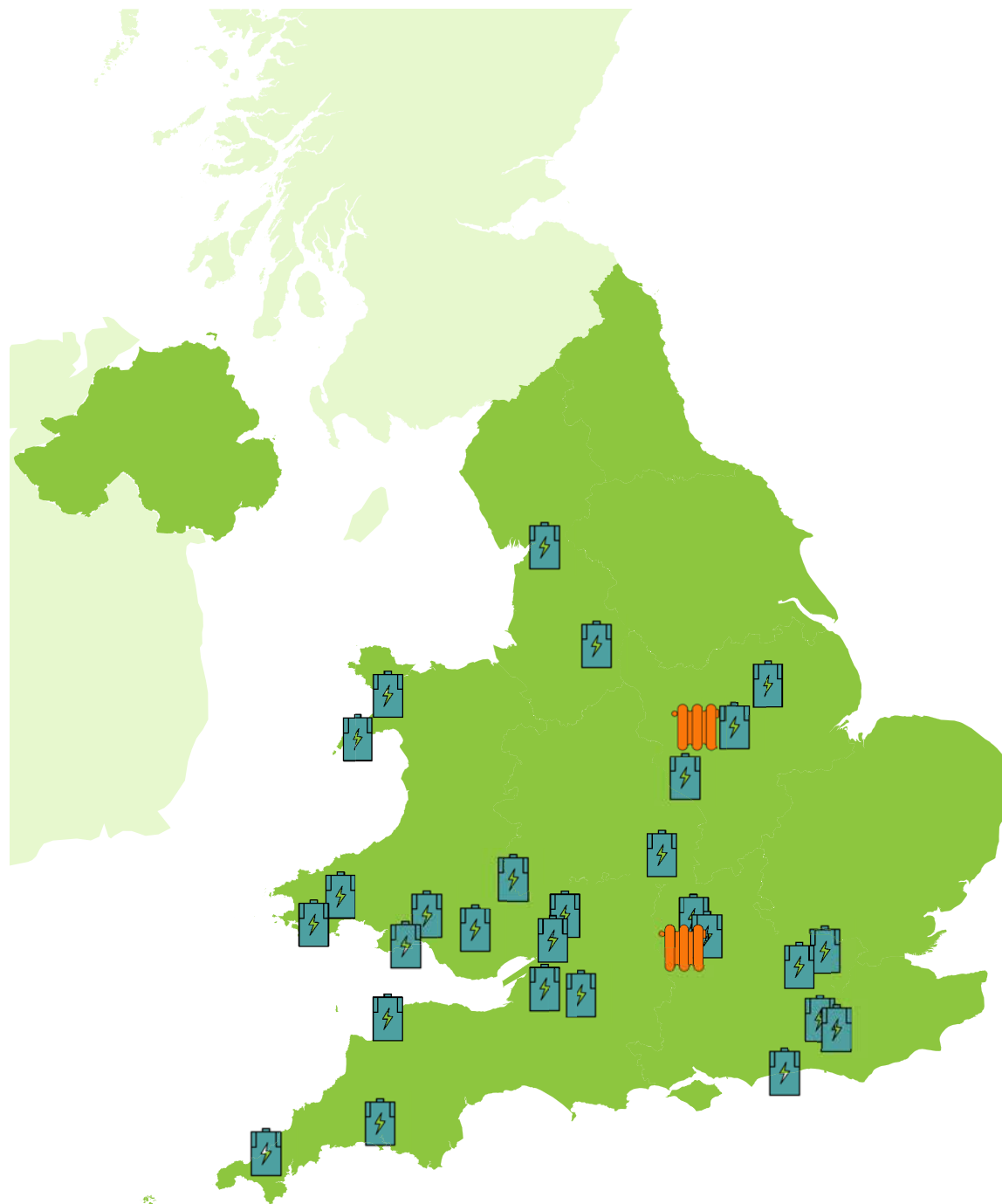
Community energy
storage projects
in 2018



Heat Storage



Battery Storage



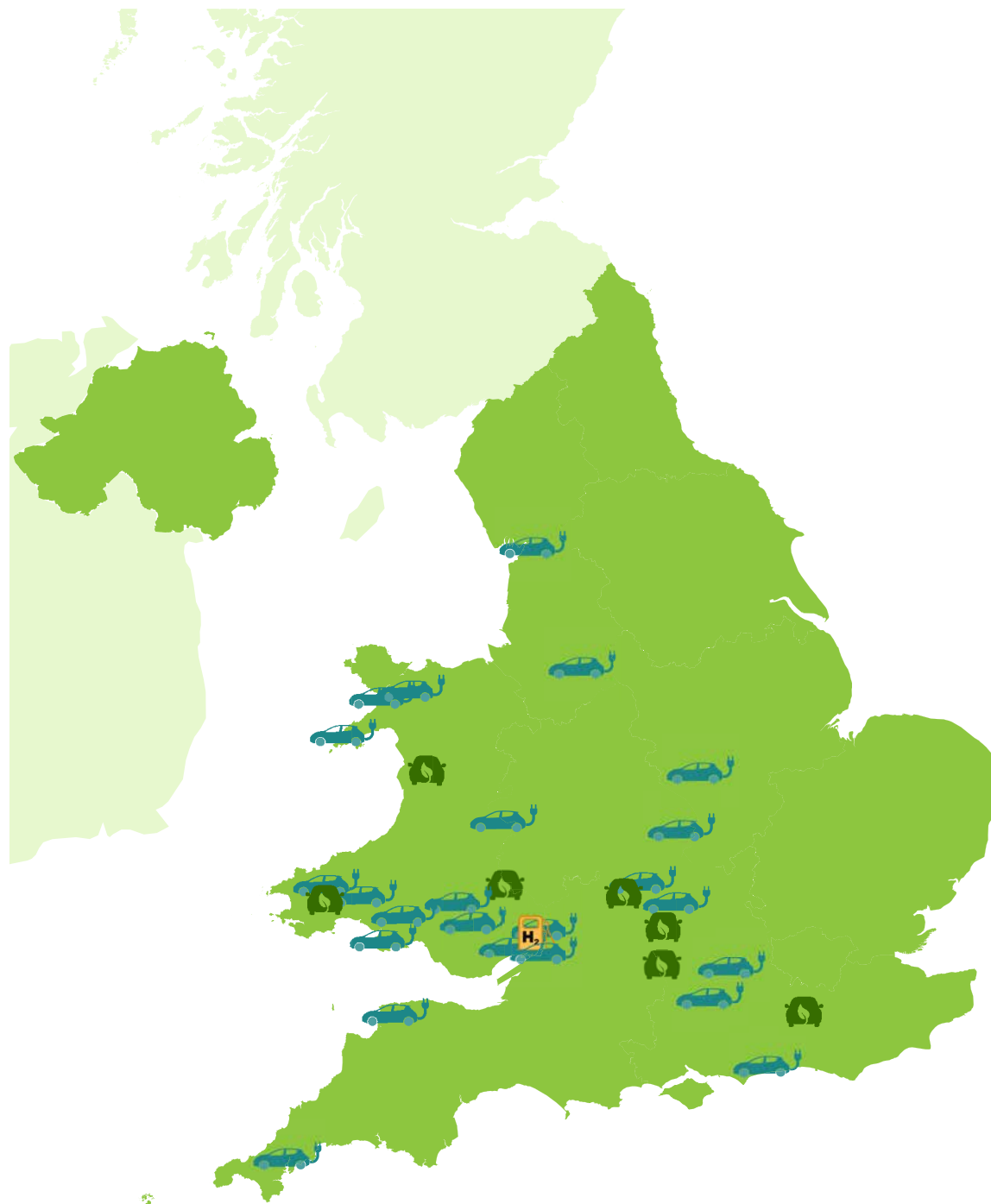
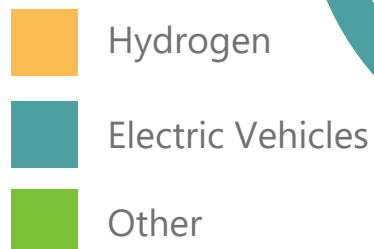
Community Energy State of the Sector 2019

Low Carbon Transport



29

Community involved in
low carbon transport
in 2018



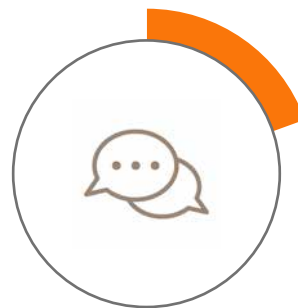
Community Energy State of the Sector 2019

128,000 Local people engaged by
Energy Efficiency projects in 2018

Energy Efficiency



Energy Audits



Advice &
Workshops



Energy Efficient
Lighting



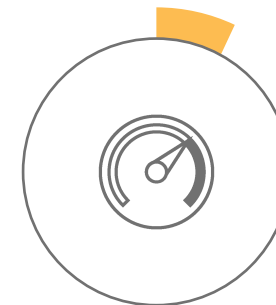
Insulation



Energy
Switching



Energy Cafés



Smart Meter
Installation



Community Energy State of the Sector 2019

Funding

"We need financial support to allow innovative action and pay for staffing costs to increase capacity"



£2.3 million
development funding used in 2018



Ynni
Cymunedol Cymru
Community Energy
Wales



Community Energy State of the Sector 2019

Investment

"We are self-financing through ownership of 8 Solar PV installations and use the Feed-in Tariff to support our activities."



£40 million

Finance raised in 2018 to support
community energy projects

Community Energy State of the Sector 2019

Community Motivations



"Our motivation is to create a decentralised, decarbonised, and democratised energy system"

Community Energy State of the Sector 2019

Challenges

"Feed-in Tariff [removal] will be an issue post-March 2020 after building under preregistering ends. Loss of tax relief is another issue."



- Removal of Feed-In Tariffs
- Removal of Export Tariffs
- Lack of funding
- Insufficient subsidy support
- High grid costs



- Lack of expertise
- Lack of organisational capacity
- Time constraints
- Limited public support
- Access to a suitable site

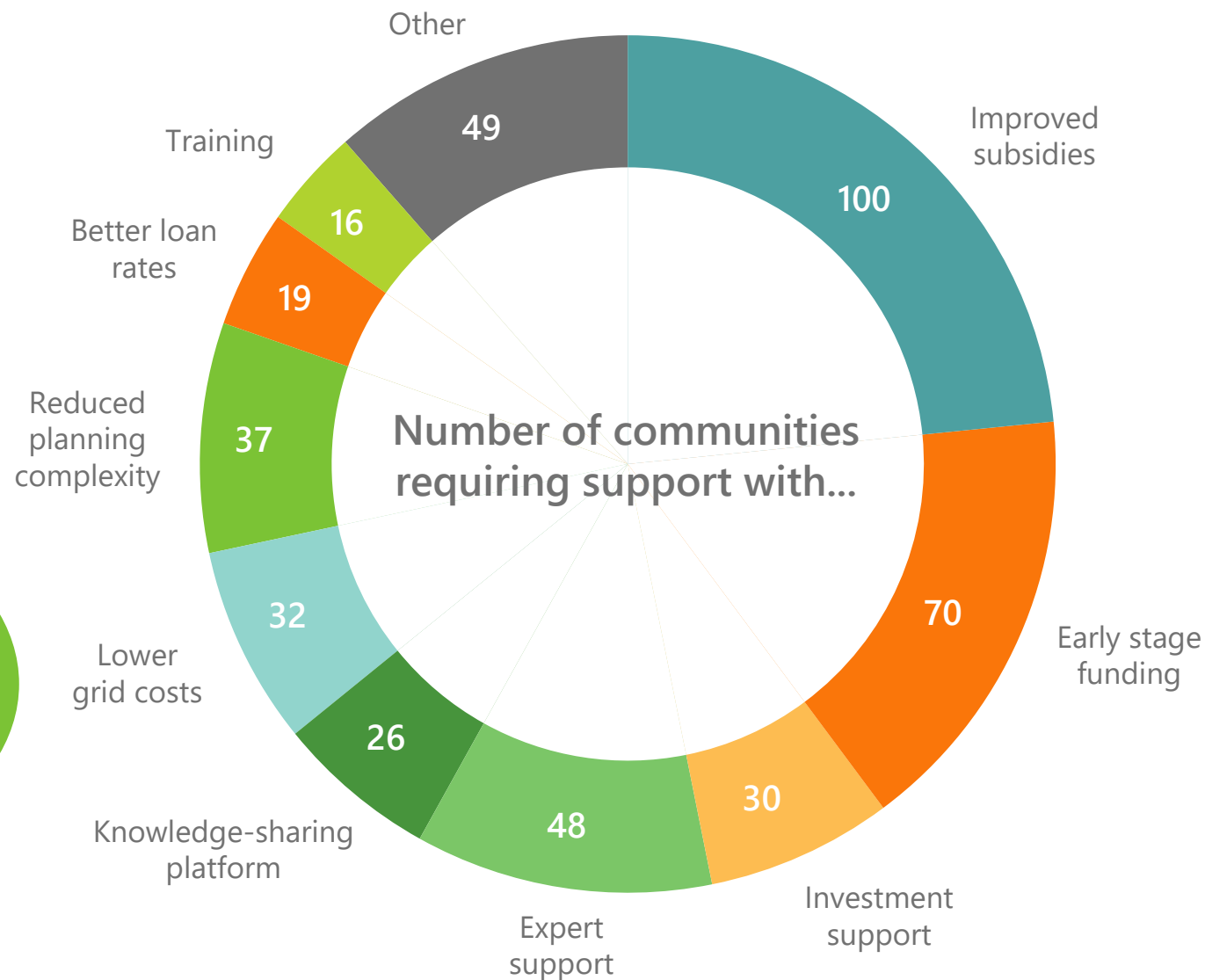


- Lack of policy support
- Securing planning permission
- Lack of innovation support
- Lack of support from local authority

Community Energy State of the Sector 2019

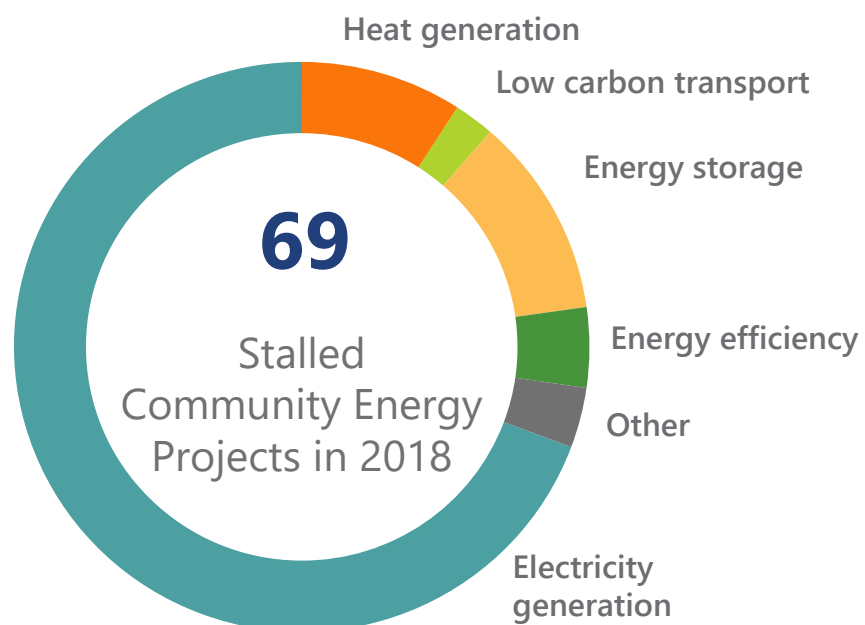
Supporting Communities

"Collaborative relationship with supportive local administrations. More commercial interest and commitment to the local community"

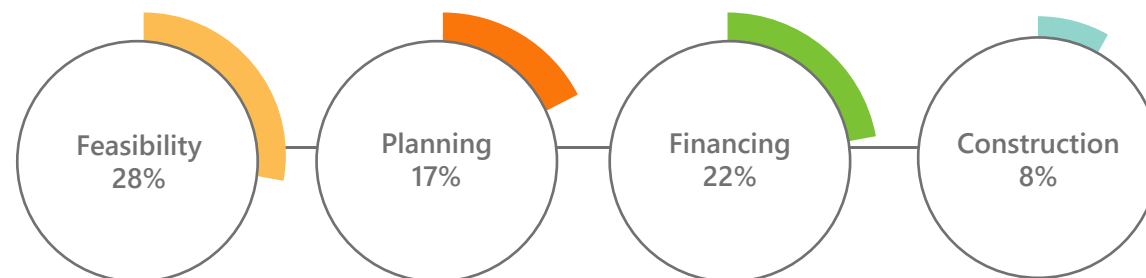


Community Energy State of the Sector 2019

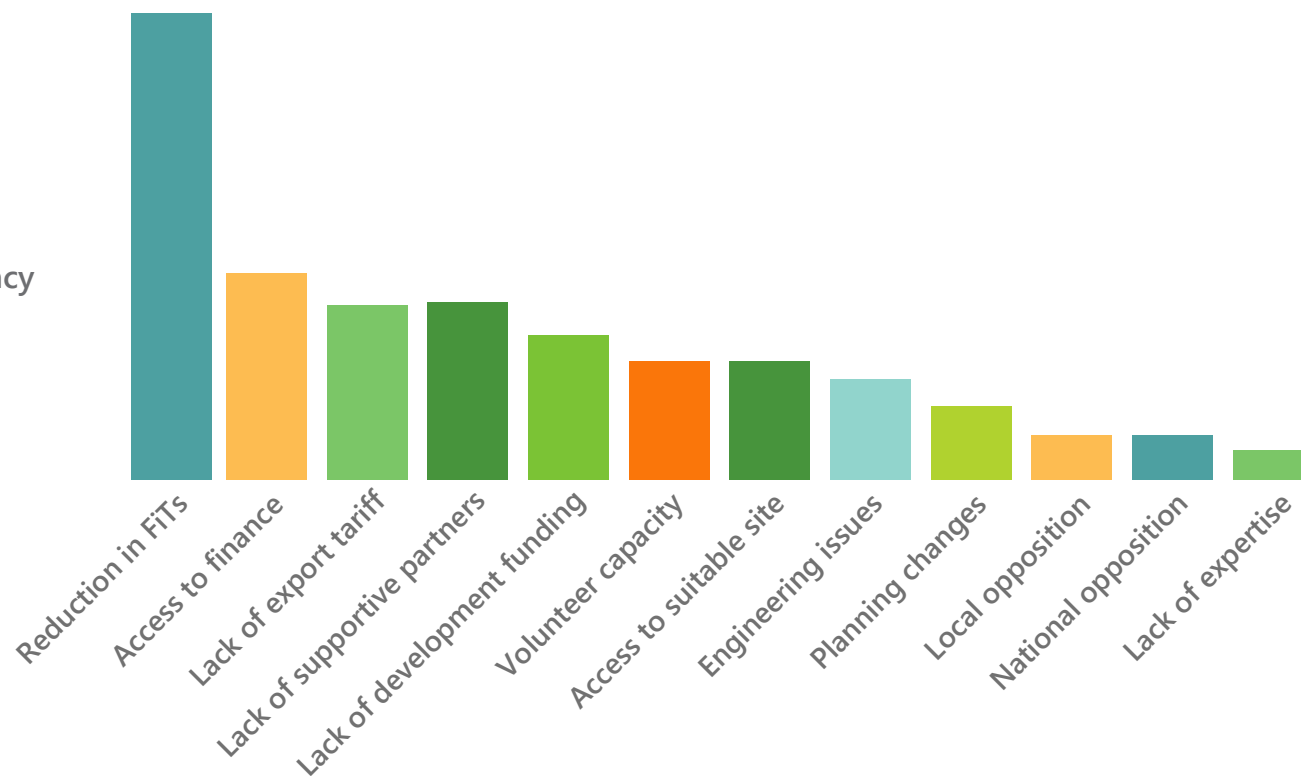
Stalled Projects



At the stage of...



Due to...





Ynni
Cymunedol Cymru
Community Energy
Wales



Community Energy

State of the Sector 2019

Community Benefit

£978,000

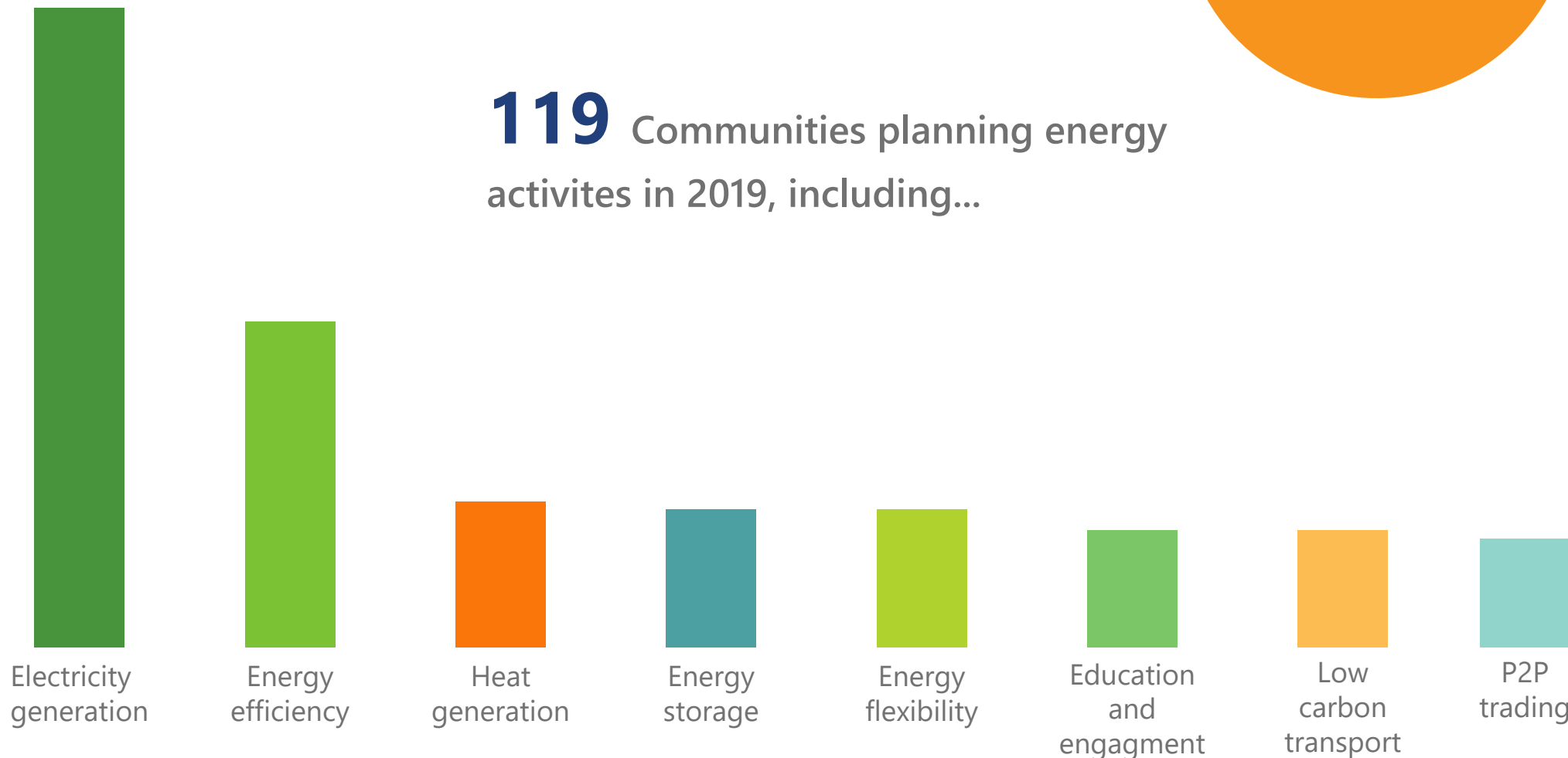
Community benefit funding spent in 2018
on local community developments, including...



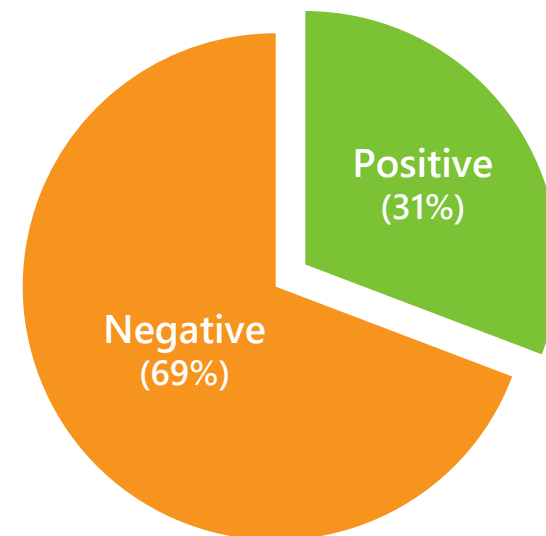
Community Energy State of the Sector 2019

Future of Community Energy

119 Communities planning energy
activities in 2019, including...



Community views on
the future of the
community energy sector



Community Energy State of the Sector 2019

Case Studies



Harbury Energy Initiative

In 2015, Harbury Energy Initiative introduced an electric car club in association with partners at E-Car Club, parking two Renault electric vehicles near Harbury village library and café. This trial was made possible through a successful £18,000 grant from the Department for Transport's 'Developing Car Clubs in England' challenge.



Schools' Energy Cooperative

The Schools' Energy Co-operative is an iconic community energy group leader, partnering with and installing solar arrays on over 48 schools across the UK. The co-operative now has over 250 members and has supported the installation of nearly 2 MW of solar PV. The Schools' Energy Co-operative project delivery model works in partnership with other community energy organisations and local councils.

Meadows Ozone Energy Services (MOZES)

Between 2014 and 2018, the Meadows Ozone Energy Services (MOZES) social enterprise group investigated the potential to use energy storage to reduce its local community's fuel costs and energy use. This Horizon 2020 funded 'Sensible Project' was made possible through the group's partnership with the Universities of Nottingham, Oporto, Seville, and Nurnberg. The demonstration aimed to show how effective energy storage can be in reducing grid demand as well as energy costs for the residents. Having secured new funding, the project will be extended for another year.





Ynni
Cymunedol Cymru
Community Energy
Wales



Community Energy State of the Sector 2019

Community Viewpoints

Communities generally have a negative view of the future of the community energy sector, balanced by a high level of resilience and optimism.

"The reduced feed-in tariffs make the financial attractions marginal. Without a stronger financial case it will prove difficult to obtain commitment."

"There appears to be a revival in the sector as groups innovate solutions to post subsidy generation, grid innovation, aggregation and demand management are starting to be taken up by some groups."

"The removal of the FIT is forcing community energy groups to think differently about their role and diversify their services and look beyond generation projects."

"There is no long-term vision for the energy transition in the UK, despite consensus in other countries. This is shocking given the evidence on climate breakdown."

Awel Co-op Windfarm

Find out more at:
hub.communityenergyengland.org



Community Energy England

The Workstation
15 Paternoster Row
Sheffield
S1 2BX
www.communityenergyengland.org



info@communityenergyengland.org



+44 (0)114 312 248



@Comm1NRG



info@communityenergywales.org



+44 (0)2920 190 260



@CommEnergyWales

Community Energy Wales

17 West Bute Street
Cardiff
CF10 5EP
www.communityenergywales.org

