

## SOLTHERM EUROPE - CAMPAIGN GUIDELINES

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## Foreword

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Solar heating can make a significant contribution to meeting the EU's Kyoto targets for CO<sub>2</sub>-emission reduction. The Soltherm Europe Initiative is the central action network that provides a common umbrella for all parties to make an important contribution to EU's Campaign for Take-Off target to realise 15 million m<sup>2</sup> of total installed collector area in 2004.

The most promising market segments for a solar thermal market development strategy are the renovation market of water heaters in single houses, collective water heating systems, combined solar space and water heating systems and solar water heaters for new housing. A crucial link in the market development is to give potential buyers good information and to guide them to trained and motivated sales and installation organisations. The Soltherm Europe Initiative aims to create this link in all EU countries by creating a co-operation between sales and installation companies and info centres and information campaigns. Synergy can be gained by co-operation at the European level and by collaboration with existing initiatives.

In these Campaign Guidelines, the experience from a number of important market stimulation initiatives throughout Europe has been brought together and translated into recommendations, lessons and campaign examples. In this way, new market stimulation campaigns and actions are able to make better use of the experience that has been made in the past decade.

Soltherm Europe is also making available several other resources and tools for market actors in the solar thermal branch:

- ☀ A central web-site, [www.soltherm.org](http://www.soltherm.org), with general information
- ☀ An on-line database of tools and resources used by market actors and campaign organisers throughout Europe. Each tool is accompanied by a concise description on how and when to use it, in English and in the language of the tool.
- ☀ Market Reports on EU level and for ten countries plus 3 regions that give an overview and analyse the present market situation.
- ☀ An overview of quality management tools relevant to solar thermal products and installation

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## SUMMARY

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In this report, recommendations, guidelines and successful examples are given for campaigns and actions to enlarge the market for solar heating products in Europe. These have been based on the experiences of campaigns that have made a significant contribution to the growth of the solar heating market in European countries in the past decade. Campaigns and market stimulation actions can take various forms and sizes, and can be initiated by very different parties, including authorities, energy utilities, consultants and energy agencies.

In a good market stimulation campaign, sufficient attention should be paid to both the demand side and the supply side. In promotion and publicity (the 'demand side'), sufficient attention needs to be paid to the lifestyle aspect and to process-oriented planning. It has proven important to involve all parties with an interest into the campaign and to ensure excellent communication between these parties. Intensive and well-designed marketing and coaching of the customers is required to bring the customer from a usually low level of familiarity and knowledge to a preparedness to invest in solar heating. Effective and customer-friendly integration of incentives can make an important change on the cost aspect.

On the supply side, action has to be taken to ensure that consumers can easily find high-quality products and contact installers that know not only how to install but also how to sell a solar product. This implies well-designed selection of products and installers as well as good channeling of leads. In campaigns when intensive marketing is performed, central tendering for the hardware and the installation work can be an attractive option.

Another main issue for solar campaigns is quality management: to ensure that the products and the installation work are of such quality that they will contribute to a good image of solar heating. The main structures available are the CEN Standards, the Solar Keymark and national certificates, guidelines and test reports. Other important ways to control the quality are tendering, specific courses and/or selective incentives.

In these Guidelines, a number of successful campaigns in Europe of the past period of market development have been presented as examples for use in new campaigns. Each campaign is briefly presented and analysed in a 'campaign sheet', detailing its effects, special aspects, success and failure factors (both internal and external), and recommendations for those who would like to initiate similar campaigns. Also a checklist for campaign organisers is included, into which the most important aspects of effective campaigns have been integrated.

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## 1 Introduction

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*These Campaign Guidelines give recommendations, tips and examples for campaigns and other actions that have the goal to enlarge the market for solar heating products in Europe. These have been based on the experiences of parties in ten European countries, that have made a significant contribution to the growth of the solar heating market in Europe in the past decade.*

The cumulative solar collector area installed in the EU by 2001 is about 11 million m<sup>2</sup>. Collector sales in 2001 have amounted to well over 1,000,000 m<sup>2</sup>, however there are considerable changes between different countries and even regions. Even though international trade is rising, the markets are still mainly national. In the Soltherm European Market Report and accompanying country reports [1] [2] an analysis of the markets is given.

It is expected that the market will continue to grow, but a steep market growth will be needed to meet the European White Paper target of 100 million square meters of solar collectors installed by 2010. Extra supporting measures are necessary to further accelerate the European solar thermal market to meet this goal. This includes:

- increased efforts to perform targeted, local/regional and national market stimulation campaigns and knowledge exchange between such actions,
- support for well-organised demonstration projects in smaller markets,
- knowledge transfer and training programs towards installers and
- more powerful quality management.

This report aims to provide recommendations and guidelines for any party involved in or interested to perform market enlargement actions for solar heating products in Europe. It unites the experiences from a number of parties that have played active roles in developing the solar heating market to the state it is in now. The different approaches that these parties have used have been analysed and condensed into guidelines to organise marketing campaigns and actions in European countries. It is interesting to note that in many cases, rather original solutions have proven to be more successful than simple application of standard marketing rules. Apparently, the solar heating market is a special one in some aspects. Some of these aspects may be the large dependency of the market on external factors like government policies, energy prices and environmental awareness.

In this report, the word ‘campaign’ is used to describe an organised action to promote, market and/or sell solar heating products.

In some markets like Germany, Austria, Denmark and Switzerland, there is a considerable penetration of ‘solar combisystems’ that combine solar water heating and solar space

heating. As the marketing dynamics for these systems are not so different from those for 'pure' solar water heaters, the guidelines of this report can also be considered for combi-systems. In fact, they will also be valid to a certain degree for other solar heating technologies.

These Soltherm Campaign Guidelines are structured as follows:

- ☀ In **chapter 2**, the **parties** that can be active in campaigns are described together with their position, interests and importance with regard to the stimulation of solar heating technology.
- ☀ One of the points that these guidelines aim to press, is that it is essential to properly design and organise a solar heating marketing campaign on both the supply side and the demand side. Therefore, **chapter 3** details guidelines concerning the **demand side** of campaigns and **chapter 4** gives information on the **supply side**.
- ☀ Also, **quality control** is an essential component of responsible market stimulation, as the product is very sensitive to the confidence that the consumer has in it. Chapter 5 is devoted to this issue.
- ☀ In these guidelines, a number of 'campaign models' or good examples of successful approaches from the last decade of market growth are analysed and presented. An **introduction** on how to read and use these models is given in **chapter 6** and the **campaign models** themselves are given in **chapter 7**.
- ☀ Soltherm Europe supports organisers of campaigns for marketing of solar heating products in several other ways; these **campaign tools and materials** are presented in **chapter 8**.
- ☀ The campaign guidelines end with **conclusions** in **chapter 9**.
- ☀ The most important points of attention that are presented in these guidelines are summarised in the form of a **Checklist for campaign design: Annex A**.



## 2 Who can be involved in a campaign

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*Experience shows that campaigns and market stimulation actions can be initiated by a large number of different parties. In this chapter it will be discussed who is invited to set up solar campaigns and what roles different parties can play. In chapter 3 “Designing the Demand Side” as well as in chapter 6 “Introduction to campaign models” many useful things to consider when initiating a solar campaign are described in more detail.*

### 2.1 Initiators

As the different Soltherm National campaign reports [2] show, many different parties can take the initiative for a market action or campaign. The following list of organisers of solar water heater campaigns demonstrates the variety of organisations/institutions that have already organised successful campaigns to promote solar energy.

- ☀ Energy utilities
- ☀ Municipalities
- ☀ Energy agencies
- ☀ Consultancy companies
- ☀ Associations for the development of renewable energies
- ☀ Local authorities

Their roles can be manifold. The above mentioned parties can act as

- ☀ Policy makers
- ☀ Financial subsidies providers
- ☀ Co-ordinators
- ☀ Information provider
- ☀ Steering committee
- ☀ Contact keepers/Networkers
- ☀ Technical support
- ☀ Evaluators of suppliers and installers offers
- ☀ Consultants for expert knowledge on procurement and integration in building designs

For example, in the famous German campaign “Solar – na klar!” B.A.U.M. as the leading green economy association in Germany, realised that it was in a good position to propose and initiate the German solar water heater campaign. With 450 company members active in the field of environmental management, as well as an established political lobbying network, B.A.U.M. was capable to spread and transport a social vision and economic challenge and to bring together economic, policy and social actors in an action network.

Also a solar industry association, an installer association or a trade guild, or even a powerful ecological association could be the initiators in other countries.

Parties that can be involved in campaigns are:

### **2.1.1 Governments**

As seen in France with the “Plan Soleil” and a number of other national and regional initiatives, the government can launch very successful campaigning programmes with the help of state agencies specialised in the field of (renewable) energy. Driven by international and national agreements on reduction of greenhouse gas emissions, energy saving and so on, governmental bodies still remain an important factor for SWH market development. An effective policy, much more than favourable local climatic conditions, boosts the penetration of solar energy. On the one hand that is encouraging: the market can effectively be influenced. On the other hand it means that without governmental support it is still hard to develop solar heating markets.

Several levels of governments can be active in the solar market:

#### **☀ European Commission**

The Commission is, through its different programs to stimulate research, demonstration, awareness campaigns and market introduction, an important background factor for the solar water heating market as well as for individual campaigns, as can be seen in some of the Campaign Formats (see chapter 7).

#### **☀ National governments**

National governments can (and in many cases do) play an important role by endorsing SWH in awareness campaigns, incentives and regulations, and by including solar water heating in their energy saving or climate protection programs. Also governments can directly support market development campaigns.

#### **☀ Regional and Local Governments**

Local and regional governments can specifically support SWH by including them in energy saving plans, by endorsing SWH through local regulations and by realising own projects.

### **2.1.2 Solar heating industry**

The Solar Water Heater industry and related branch organisations (on regional and national level as well as on the European level: ESIF and ASTIG (currently merging into ESTIF)) are doing important work in adopting and promoting the European standards

([3], [4] and [5]) and the Solar Keymark presently under development. Extra attention is however needed in a number of countries, to further inform the solar industry of these developments.

Also, more coherent action should be taken toward regional, national and European governments to give solar heating a higher place on political agendas.

As the market will become more professional, the industry should further grow towards large-scale production and professionals should become more familiar with tendering and offering procedures. A good example is the following evaluation of a SWH project that included tendering of individual SWH:

'... (The procurer) is so far satisfied with the result of the project. This is mainly due to the fact that (the procurer) spent a lot of time in the design phase and on the evaluation of tenders. A major recommendation for future projects is that manufacturers/contractors should be able to offer complete and simple systems with an ensured performance.'

### *2.1.3 Installers*

Installers are an important factor for the market development of SWH. In a starting market, installation errors are a major cause of malfunctioning systems, which are destructive to the confidence of the consumers. In a well-developed market, installers should become the prime selling link for solar products. That means that they must be motivated and involved much more than they are now. As the installation branch is very large and distributed over many parties, such involvement must be reached through different channels:

- ☀ General awareness campaigns to increase the knowledge about, and the image of solar water heaters with individual installers.
- ☀ Courses and workshops
- ☀ Involvement of branch organisations of installers
- ☀ Development of guidelines and certificates (preferably in co-operation with the branch organisations).

Several subsidy programmes, including those in Denmark, France, Belgium, have successfully raised the knowledge level of installers by combining the subsidy with quality requirements of installers (having followed solar water heater installation courses, certificates) as well as education programs. The Altener Qualisol project [3] is taking the first steps toward development of courses and workshops as well as guidelines.

Because of the importance of installers for solar heating, their motivation, interests and margins must not be neglected. Installers with no previous experience with solar heating have often charged high prices on first projects in order to cover unforeseen risks. This can make solar heating unattractive to the first customers. Subsidies and demonstration projects should be established to cover these 'learning expenses'.

#### ***2.1.4 Roofers and carpenters***

In a number of cases, specialised roofers and/or carpenters are involved in the installation of solar heating plants, for instance when the installer is not able to do the work on the roof. This means that these parties too should be sufficiently knowledgeable on the specific requirements of solar technology, and should build up sufficient positive experience to be motivated to take part in solar projects.

#### ***2.1.5 Energy utilities***

Energy utilities can have many different roles in relation to solar heating, and the motivation behind these roles may also differ. Some utilities effectively discourage the use of solar heating, others offer subsidies or generate publicity and some have become market parties that offer solar heaters in leasing or contracting schemes. Motivation may result from regulations, covenants and/or market signals.

Energy utilities can thus be an important promoter of solar energy, if they adopt it either as part of an environmental protection program or as a means to extend their position in a liberalised energy market. In several markets they have played a very important role in the realisation of the present market.

#### ***2.1.6 Branch organisations of consumers***

Branch organisations, including organisations of private consumers but also of housing associations, of the care sector, of the sports sector, of the hotels sector and other organisations of potential consumers of solar heating products, can be important promoters. In a few cases such umbrella organisations take own initiatives for promotion of solar heating, but generally they are a good party to involve in promotion campaigns.

#### ***2.1.7 Architects***

Architects almost only play a role in the dissemination for new building developments, but in that phase their co-operation is very important to promote the technology. Architects and engineers are a good channel to reach project developers and housing associations.

The image of solar heating technology is not as prominent as that of solar PV applications. Architects have made very interesting building designs with integration of PV; but there are not as many good examples of integration of solar thermal products. Architects should therefore be stimulated to become more conscious of the energy saving possibilities of solar heating as well as aesthetically pleasing ways to include solar water heaters in new building designs and renovation projects.

#### ***2.1.8 Engineers***

Engineers play an important role as designers of large systems. Education for this group is still insufficient. Even in a well-developed market like Germany, for large systems, education and information for engineers is more important than for installers; presently

the manufacturers cope with this situation by having their own engineering and planning services as a substitution for the lack of supportive engineers.

### ***2.1.9 R&D Institutes***

In a number of European countries, test institutes are assessing the quality and measuring the performance of solar water heaters. These institutes are often an important source of objective product information for the market and most have also contributed to product improvement and innovation.

Many test institutes combine the testing and information activities with consultancy-like work; in that role they may also be seen as ‘promoters’.

### ***2.1.10 Energy agencies***

Energy agencies (national, regional or local) have played a decisive role in the development of the Austrian, French, Dutch and Spanish solar heating market, and also in several other countries they are playing increasing roles. They are strongly motivated and have comparatively good channels to financing of marketing campaigns. Energy agencies are seen as a prime target group for Soltherm Europe.

### ***2.1.11 Other important parties and promoters***

There are many other important parties that could support solar campaigns or be a failure factor if they are not considered duly:

- ☀ NGO's
- ☀ Owners and runners of renewable energy plants
- ☀ Communication agencies
- ☀ Solar Industry Associations
- ☀ Universities
- ☀ Environmental organisations
- ☀ Consumer organisations
- ☀ Manufacturers
- ☀ Banks (providing credits)
- ☀ Local trade guilds

Promoters are a mixed group that often contains a large expertise on solar water heaters and may be very useful for marketing purposes. Parties in this group can well initiate marketing campaigns for solar water heaters, as numerous examples have shown. They can offer the publicity or the expertise in other parties' activities.

## **2.2 Some examples for successful involvement of different actors**

Within the French campaign “Plan Solaire Régional Rhône Alpes” association for the development of renewable energies played the important role as information provider for local authorities and private individuals. They also carried out feasibility studies for owners.

Ecofys, as an external consultant, initiated, developed and co-ordinated most of the campaigns in the Netherlands. During the campaigns they always look for a close collaboration with local authorities, utilities, suppliers and installers, all under supervision of Ecofys.

In Austria a “Self-building-group-initiative” in the beginning was carried out by a group of idealists free of charge. Later on these groups were supported by different official institutions. Afterwards a nation-wide organisational and technical guidance of self-building groups resulted from the establishment of an advisory service infrastructure throughout Austria. This shows that often ministries/governmental departments can give initiators of campaigns useful nation wide support.

In Greece a public organisation for the consumer protection, the Greek Consumer Institute (INKA) was involved, which had a positive effect on the campaign results.

Most of the Soltherm Europe national campaign reports emphasise the importance of involving many different market actors and end users. It’s not always easy to actively involve the installers within campaigns. In Italy for example, problems still seem to arise from bad experiences with solar heating installations during the 80ies. Here a major effort is necessary to motivate and train installers of new solar heating systems, and to provide good examples (demonstration projects) to show the consumers the reliability of the current technology.

It can be concluded that to raise the public awareness of the environmental problems, the support of solar thermal energy by the government, the development of creative market strategies by several public or private market actors and the active participation of suppliers and potential users seem a successful strategy.

Figure 1 shows an example of how basic different parties in a solar campaign can cooperate. This example is of the campaign ‘Solarenergie Kommt!’ in Hannover, Germany; this campaign is also described as one of the Campaign Examples, see section 7.3.1.

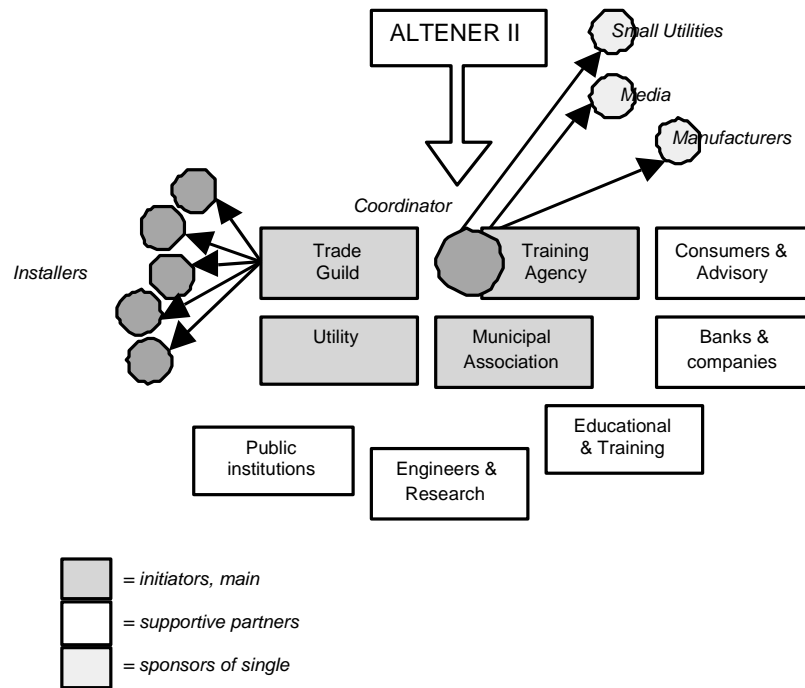


Figure 1: Links between the parties in the campaign 'Solarenergie Kommt!' in Hannover, Germany.

## 3 Designing a Campaign: Demand Side

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*The campaign models of Chapter 7 will show that for a successful solar water heater campaign great attention has to be paid to the demand side. Intensive promotion, publicity, incentives and support are necessary to make a campaign successful. Emphasis should be put on a good planning of a campaign and the involvement of all relevant market actors.*

### 3.1 Introduction

A good market stimulation campaign has two sides: sufficient attention should be paid to both the demand side and the supply side. When one of these sides is neglected, the chances of success drop strongly. This could be expressed as follows in a ‘campaign success factor’ [18]:

CSF	=	S	* D
Campaign Success Factor	=	Supply	* Demand

Where supply and demand could be elaborated further:

<b>Supply side:</b>	<b>Demand side:</b>
1. Qualified product ?	1. Selection of target group ?
2. Qualified installer ?	2. Incentives ?
3. Good price performance ration ?	3. Remove possible barriers ?
4. Product and installation guarantee ?	(like building regulations, streamlining of subsidies etc.)
5. ? ?	4. Well organised and executed communication plan ?
+ _____	5. ? ? +
Total 1,00	Total 1,00

In this chapter, the actions on the demand side are discussed. The supply side actions are discussed in the next chapter.

### 3.2 Actions used in the campaigns

#### *Actions on the demand side*

There are many ways of promotion, publicity and incentives to support solar campaigns.

The campaign models clearly show that the most common action on the demand side is to give general information to consumers and take care of publicity. Subsidies and incen-



tives are second in ranking, followed by the installation of products and with little interval to the sales of products – both as part of the campaign. Also the promotion of specific products is quite frequent.

Pretty rarely the following actions are applied in the described marketing campaigns but can be good ideas to be developed: Solar contracting as part of the campaign, financing support with standardised/arranged bank loans for solar heating systems, assistance for obtaining tax reductions for installations and price reductions.

#### *Media, publicity and promotion actions used in the campaigns*

Press releases and brochures (sales folders, promotional leaflets) are utilised mostly in the campaign models. They are comparatively easy and favourable to produce but none the less effective. On the second place in the range of publicity instruments used within solar campaigns you can find event marketing and promotion events like fairs and conferences followed by Internet marketing, related to informative and vivid web sites. Quite a few campaign organisers state the use of articles in relevant journals, newspapers, newsletters or specialised print media in general. Only few declare – or can afford – to exert targeted media work through advertisements like billboards, radio-, TV- or cinema-spots. Stated only once in the national campaign models are the following actions: editions of books, road shows in municipalities, visits to solar installations, business meetings, direct mailing, questionnaires, meetings with citizens, call centres.

#### *Solar heater and energy saving packages*

A good idea is also to offer solar technology in balanced packages, which can include for example:

- ☀ large scale hardware and installation tendering,
- ☀ quality control (embedded in tendering procedures, inspections, solar result guarantee),
- ☀ high quality solar energy systems and back-up heating systems,
- ☀ financial, logistic, installation and after sales services.

The solar product package might be interesting for suppliers as well as for organisations that want to promote, sell or lease/rent solar systems. They can concentrate on promotion or sales, do not have to be specialists on solar thermal energy and need little preparation time.

As already mentioned a key aspect in a Solar Water Heater Campaign is efficient publicity. Publicity should be strategically planned and different measures should be combined. Besides general information it proved to be successful to select certain target groups (e.g. districts with private homes that are 10 or more years old) and send them a direct mailing. In these districts most of the conventional heating systems have reached the replacement age which leads to good opportunities for the sale of a new heating system including solar. Additionally an information market can be organised or the visit of an expert is offered who checks, if the installation of a Solar Water Heater is suitable.

### 3.3 General information for designing a campaign

In the following section you will find some general tips how to set up marketing activities or campaigns, derived from basic marketing knowledge.

In the German campaign “Solar na klar” a guideline for regional solar initiatives was created. The results of this guideline are considered as well.

#### 3.3.1 *Solar marketing is social marketing*

Successful marketing means to take the view of the client and this view should influence the choice of the marketing instruments. For a successful solar campaign, simple promotion activities are not enough; it is also required to create a positive social climate and favourable framework conditions (e.g. subsidies) for solar technology.

#### 3.3.2 *Selection of target group*

First of all it is important to select and clearly define the target group. All further activities should be target-oriented and convincing for this specific group. The better the marketing instruments are adapted to the target group the greater will be the success of the campaign.

Experience suggests that in most cases, rather intensive publicity and advertisements are needed. The customer has in general very little a priori knowledge of solar heating, and time and intensive communication are needed to guide him to the purchase of an installation. If budget is limited, it is better to focus on a smaller region / municipality and have intensive communication there, than to have a small amount of communication in a whole country or province.

The target group of a campaign can be delimited by market sector (for instance: barbers in a whole country) but also very well by geographic choice (for instance: house-owners in a specific city). In the Dutch campaigns for existing dwellings, a limited number of homeowners in a certain municipality or region are selected, and this group is further defined as home-owners who are about to renovate their heating installation (for instance, by choosing a district with houses of about 15 years old). A general information campaign is started, followed by a mailing to the selected district. One week after the mailing, an information market is organised. From the start of the general campaign until two weeks after the market, people can register for a visit of an expert who checks if their situation is suitable for the installation of a Solar Water Heater and presents an offer.

#### 3.3.3 *Lifestyle Solar heater*

Convincing rational arguments are important to sell solar technology. However, one shouldn't forget that solar collectors are part of the living area. Therefore all communication activities should also consider a certain life style or feeling. This can be for example:

- ☀ Life in harmony with nature
- ☀ A conscious attitude towards human life with nature

- ☀ Considerate behaviour towards future generations
- ☀ High living quality and comfort
- ☀ Combination of naturalness and economy

### 3.3.4 *The 4 Ps of marketing*

In classical marketing the 4 Ps- Product, Price, Promotion and Placement- are distinguished, which are also relevant for solar marketing.

#### *Product*

In a solar campaign different aspects have to be addressed. Besides the real product (e.g. solar collector) also emotional aspects (see above) or solar services (information and counselling) should be communicated.

#### *Price*

Through an emotional communication in a solar campaign, the price of a solar plant can be placed in the background, because the benefit or a certain life-style that is associated with solar energy has more weight.

Recommendations of users of solar energy or credible personalities or celebrities can show that the money spend on solar energy is worthwhile.

On the other hand, consumers are often sensitive to temporary 'special offers' that can be created by central procurement, efficient installation and/or by arranging a special subsidy, for instance from the municipality in a local campaign.

#### *Placement and distribution*

Important for the placement is to make sure that both, the products and the services are easily and in high quality available.

It is an important advantage to the consumers if an action in which installations are sold and/or installed, also the handling and paperwork around subsidies can be taken out of the hands of the consumers as far as possible. Ideally, the organisation organising the action makes special arrangements with the bodies issuing subsidies for central handling, so that the subsidies can be subtracted from the price communicated to the customer.

#### *Promotion*

Main point of promotion activities is to create and stabilise a demand for the product or the service. Therefore it is important to find out through which media (advertising, articles in magazines, events etc.) the target group can be addressed in an effective way. The better the instruments are adapted to the specific target group the more successful they will be.

### 3.3.5 *Process oriented planning of content*

Interest in a topic always depends on the phase a person is in. Information and marketing activities should therefore have a strategic orientation. Possible decision phases are:

- ☀ Non Sales Phase: The client has no interest to buy a Solar Water Heater
- ☀ Pre Sales Phase: The client starts to deal with the subject and prepares a purchase decision
- ☀ Sales Phase: The real purchase phase (choice of supplier, definition of concrete product, price etc.)
- ☀ After Sales Phase: The person has bought a Solar Water Heater, central point is now further service and avoidance that the client regrets his decision

In general, buying a SWH can take a long decision process, where the client is undergoing the different phases. Marketing should gradually guide the clients from (often) a first contact to the technology to a certain familiarity and enthusiasm on the technology. A marketing campaign has to consider these phases and employ the required instruments as listed below:

1. Awareness: Advertising to make the client attentive towards solar collectors
2. Information and counselling: Specific information (brochures, leaflets, internet) and public relations
3. Decision and purchase: direct contact is helpful to convince the client (e.g. events, fairs, counselling etc.)
4. Order and installation: trained installers, high quality offers are required
5. Use: further support (e.g. trouble shooting) can avoid that the client regrets the decision

Another way to formulate taking the consumer perspective, is given by the following questions that may be encountered from consumers, and means to answer them:

- |                                |                           |
|--------------------------------|---------------------------|
| ☀ "A solar what?"              | basic campaign            |
| ☀ Why?                         | basic campaign            |
| ☀ Where can I get information? | info centres              |
| ☀ How do I get a good offer?   | info centres              |
| ☀ Gosh, that's expensive!      | scale, subsidies, finance |
| ☀ How does it look on my roof? | integration technology    |
| ☀ Where does the storage go?   | integration technology    |
| ☀ Was it installed right?      | QC, installers education  |
| ☀ Does it work?                | monitoring                |
| ☀ How long does it last?       | Durability                |

Figure 2 describes the communication process in the Solar na Klar campaign in Germany.

### Customer oriented 3-steps communication process within “Solar - na klar!”

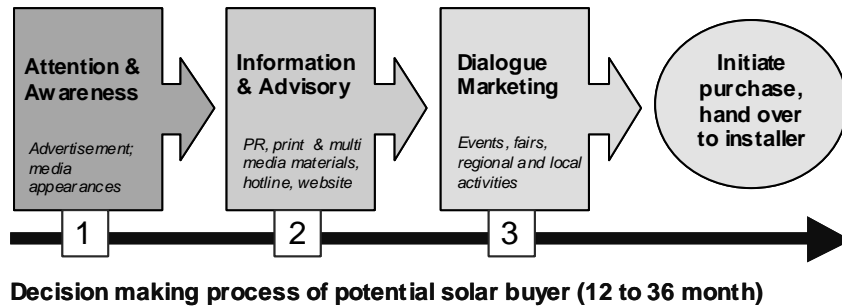


Figure 2: Process-oriented planning in the 'Solar na klar' campaign.

#### 3.3.6 Design of a campaign

A good example for a design of a campaign can be found in the guidelines of “Solar na klar Regional” [9]. The design of the campaign is described below. The central task of the campaign was defined as follows: to raise the awareness of the public and the target group, to provide information and to lead to a purchase decision.

All external-oriented activities build up the campaign. The campaign was divided in three parts: advertising, public relations and events. The different elements of the campaign complement each other and support interested clients through all purchase phases - from a raised awareness till the decision of purchase.

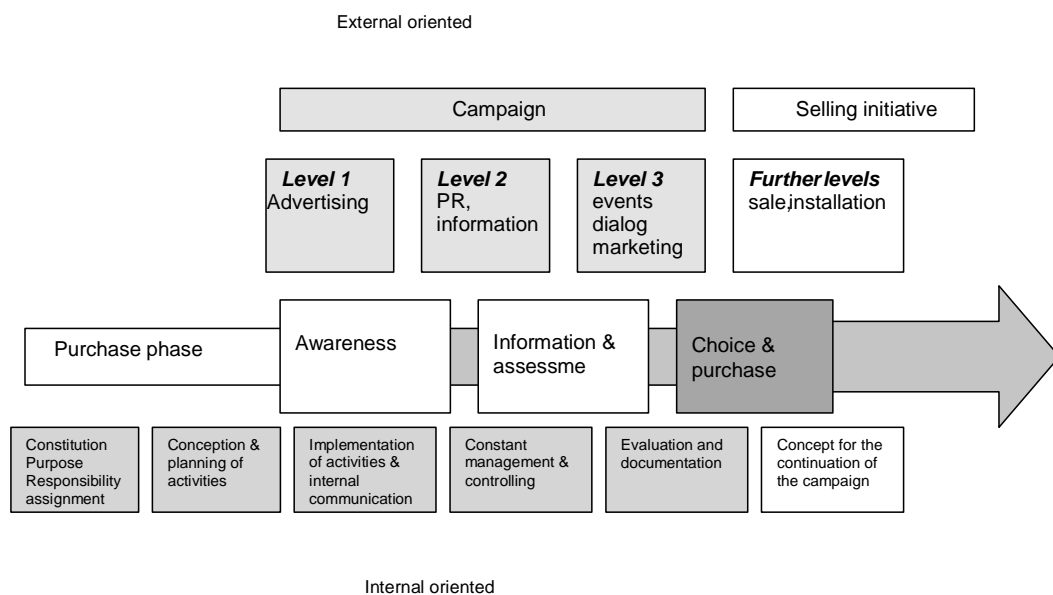


Figure 3: Campaign schedule of the Solar Na Klar! Regional Guidelines [9]

### **3.3.7 Corporate Design**

A campaign should have a central message. This message should be communicated both through the contents and the Corporate Design. Corporate Design means that all instruments have a uniform layout. Through this the recognition and memory of the contents is simplified.

Also a memorable and appealing name for the campaign or initiative is recommended.

### **3.3.8 Sponsoring**

Institutions and companies who don't deal with solar energy in their own business segment might still have an interest in supporting a solar campaign because it gives them the opportunity to create an environmentally-friendly or innovative image. The acceptance of a solar campaign can be enhanced if economical or socially important sources support it. Potential sponsors are banks, insurance companies, building associations, municipalities, branch organisations, utilities etc. These parties could endorse a campaign, contribute to it by financing for instance an extra subsidy, or co-operate in the field of regulations.

It is especially worthwhile to involve municipalities and utilities that want to promote solar water heaters in the existing private housing market. Most of these organisations have environmental goals, but also have a lack of instruments, ideas and experience to achieve these goals.

### **3.3.9 Incentives**

Incentives are in most countries still needed to increase profitability to levels acceptable to larger groups of consumers. Some campaigns or market development programs are organised in order to efficiently accompany incentives to the market, like the French Plan Soleil and the Soltherm market development program of the Belgian Walloon region.

The level of a government incentive is often less important than the fact that the government endorses solar heating. The existence of incentives or other endorsement by trusted parties like governments and utilities alone is seen by the consumers as a certain quality reassurance. However, incentives have to fulfil a number of requirements because several examples have shown that a badly organised incentive can destroy a market (Source: [6]).

One example are subsidy programmes that are announced and do not become operative or programmes with too low budget or short duration. These can cause a 'stop and go'-market and thus become contraproductive.

The level of incentive should not be so high as to invite low-quality products on the market. For the same reason there should always be sufficient requirements on the quality and performance of the products, in order to obtain the incentive.

It is however important that an incentive, be it a subsidy, a tax incentive or otherwise, must be easily accessible for the target groups and it should be given sufficient promotion. In some countries, extremely complicated application procedures make

incentives practically ineffective. The following guidelines can be given for the design of a regional subsidy programme:

- ☀ The subsidy programme should be designed, budgeted and financed on long-term (for at least 5 years). The finances available for the subsidy programme should be sufficient and stable, in order to ensure a continuous operation of the programme. The expected market growth in the programme period should be taken into consideration.
- ☀ The subsidy programme should become operative soon after its announcement, in order to avoid 'stop-and-go' effects.
- ☀ The financial contribution should not be excessively high. Depending on the climate and energy costs, a financial contribution of about 30 % of the total investment is often sufficient. The contribution can be linked to the solar collector area or the heat output (calculated in a standardised way).
- ☀ Requirements on the minimal quality of the hardware and installation should be integrated into the subsidy programme, but tests and procedures to fulfill these should not be bureaucratic or very expensive. See also Chapter 5.
- ☀ The documents necessary for applying for the subsidy should be limited to a simple fill-in form and a price offer of a supplier or installer. It is very helpful if the organiser of a campaign has the possibility to collect the subsidy centrally, so that he can take the paperwork out of the hands of the end-users or the installers.
- ☀ It should be continuously possible to enter applications. The approval or disapproval should not be communicated later than two months after the entry of the application.
- ☀ The subsidy should be payable after the confirmation of the installing company that the solar heating plant has been correctly installed and taken into operation and after the compilation of the invoice by the investor and the prove that he has paid the total amount.

Another useful instrument is to establish an incentive for the support of solar water heater campaigns, as has been done by the Novem in the Netherlands in the last decade.

### ***3.3.10 Regulations***

'Solar-positive regulations' e.g. exemption from building permit, energy performance in building regulations, obligation for implementation have a generic, long-term effect (less susceptible to political influences than subsidies) [14].

It is important that governments (national, regional, local) are encouraged to check building regulations and other laws for bottlenecks that unnecessarily hinder SWH introduction. In a number of cases, regulations - that are otherwise useful - are not adapted to SWH. In the EU Thermie Project "Untapped market opportunities for solar water heaters in Europe" [16] it was concluded that in general, present energy policies in the investigated countries are slightly favourable to not favourable at all

towards SWH. In France, Italy and Spain, policies are largely seen as unfavourable towards SWH, although new developments can change this in the near future. Therefore it is important to ensure that regulations on building permits are not an unnecessary barrier for solar water heating. In Italy, the procedures are so costly and complicated, that many solar installations are built without permit, which means that the existing subsidies can not be used and that all involved parties take unnecessary risks. In many other countries, there is significant cost and/or work connected to arranging all necessary permits or documents sufficiently proving the reliability, durability or cost-effectiveness.

### ***3.3.11 Multipliers***

Multipliers are often institutions or persons who influence the public opinion on a certain topic. They can be understood more as an intercessor than a participant of the campaign. These can be for example mayors, politicians, celebrities etc.



## 4 Designing a Campaign: Supply Side

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*For a campaign to promote solar water heaters, the attention that has to be paid to ‘the supply side’ is a very important aspect. Especially in less developed markets, it has to be assured that consumers that have become interested in solar heating products are brought into contact with high-quality products and well-educated installers that are motivated to sell solar water heaters at reasonable prices.*

A number of examples of the past decade in Europe have shown that when a campaign pays insufficient attention to the supply side, it can fail to have a noticeable market effect. When the awareness and demand is stimulated, consumers will become interested and some of them will be interested in purchasing an installation. If for these consumers no adequate arrangements have been made, they will be left on their own to find installers and select products. In most European solar heating markets that is not an easy task; good and motivated installers are often still hard to find. In many cases, installers discourage consumers that ask about solar heating because of lack of knowledge and experience. This easily leads to the result that the campaign brings no noticeable increase of sales of solar water heaters.

It is therefore important to take good care of the supply side in a project. This has many aspects that can be divided in three parts:

1. The supply of the hardware of solar water heaters
2. The installation of solar water heaters
3. The information, sales and ordering process

Within these three parts several different issues of importance can be distinguished.

### 4.1 The supply of solar water heaters

#### 4.1.1 *Quality of solar water heaters*

If a campaign directly sells or promotes solar water heaters, it is of paramount importance that these products are of high quality (especially regarding expected lifetime) so that the confidence of consumers in solar water heaters is increased, not damaged. Solar water heaters are a product that requires a large up-front investment, which is compensated over its lifetime. If the consumer has any doubts on whether the product will have the promised lifetime, or whether the product will require a lot of maintenance, he will be strongly discouraged to do the investment. Therefore, if a solar water heater campaign would be successful in selling low quality solar water heaters, these could seriously damage the market for a long time. In some countries in Europe, the market is still suffering from the news generated by malfunctioning installations decades ago.

Also, low quality solar water heaters may save less energy than better ones which undermines the basic goal behind solar water heater campaigns. Therefore, especially if official bodies support a campaign, it is important that the installed solar water heaters are of such quality that they will establish (or contribute to) a good image of solar water heaters.

The selection of solar water heaters can be combined with obtaining a low price for solar water heaters in a purchase tender (see 4.1.3). In order to manage the quality of products, the following resources are available:

- ☀ CEN Standards
- ☀ The Solar Keymark
- ☀ National certificates, guidelines and test reports
- ☀ Constructions like guaranteed results and solar contracting.

Campaigns should make use of these quality criteria whenever possible. In Chapter 5 these quality resources are explained in more detail.

#### *4.1.2 Price of solar water heaters*

A low price lowers the threshold for consumers to buy solar water heaters. Besides that, the possibility to offer the solar water heater for a temporary special discount price can attract buyers by giving them the feeling that the next opportunity to buy a solar water heater will be more expensive. Arranging such a 'temporary special price' can make the proposition very attractive to the consumer.

Low prices for solar water heaters and conventional heaters can be obtained through a purchase tender; such tenders are also good structures to assure the quality of the products (see the sections on the European standards and the Solar Keymark).

A solar water heater can also be more attractive when sold in combination with a conventional water heater, especially if also conventional heaters are sold for a discount price in the same action. The additional price for a solar water heater in that case, compared with only the purchase of a heater outside the campaign, is then lowered with the discount for both the solar water heater and the discount for the conventional heater!

#### *4.1.3 Central tendering*

In a well-organised solar water heater campaign where actual sales are part of the campaign, it can be expected that a large number of solar water heaters and (conventional) heaters will be sold in a relatively short period. This creates a situation where central procurement / tendering can be an attractive option for both the hardware and the installation work.

Suppliers and installers will be motivated to join such tenders because of the expected large sales in a short period of time and/or in a relatively small area. Also, they will save on marketing costs because the campaign creates leads for them. If a limited number of products are offered, the supplier and installer will also be able to work more efficiently

on those products. In countries with a less developed market for solar water heaters, suppliers and installers will be especially motivated not to miss the chance to take part in the new development.

These considerations give the organiser of a tender a relatively strong position in negotiating with suppliers. This position can be used to be able to procure good quality solar water heater for discount prices to be sold in the solar water heater campaign.

In a purchase tender for a solar water heater campaign, suppliers that can supply solar water heaters (preferably with the option of a combined offer of a solar water heater and a conventional heater) are invited to make an offer for the expected number of solar water heaters. It is very well possible to establish rules in the tender regarding the quality of the products (see chapter 5). Suppliers are told in advance that only the best offers will be accepted and only those suppliers are allowed to sell their products in the solar water heater campaign. In the invitation to make an offer for solar water heaters, information can be requested about products, prices, quality and other items mentioned below. In a negotiation round, further information can be asked and prices and terms can be negotiated. More than one supplier can be selected to sell (some of) his products in the campaign. Advantages of selecting more than one supplier in a campaign are:

1. more choice for the customer,
2. more installers wanting to take part in the campaign,
3. More security regarding delivery capacity.

Depending on the products to be sold, the installation work can be standardised into one or more standard packages for which fixed prices can be negotiated. Extra work on top of these packages can also for a part be arranged against standard prices (for instance: the installation of extra piping can be given a fixed price per meter of pipe)

#### ***4.1.4 Other issues concerning the hardware of solar water heaters***

While investigating the suitability of a brand and type of solar water heater to be sold and installed in a solar water heater campaign, the following issues are useful to check:

1. Reliability of the supplier: continuity (bank guarantee)
2. Delivery time
3. Maximum number of deliveries per month
4. Terms of delivery (can be negotiated)
5. Quality check after installation
6. Used materials

The first three items are meant to ensure that the supply of solar water heaters in a project will be as smooth as possible. But not everything can be prevented. It has happened that suppliers have stopped selling a type of solar water heater, without selling a comparable

type instead, during a campaign. Little can be done about such a thing, because there is little chance that a supplier will inform the market of such a decision long in advance.

The terms of delivery contain the terms of guarantee and have therefore often a lot to do with the overall quality of the product. More information on guarantees and quality checks can be found in Chapter 5..

The used material can say something about the quality of the collector and storage tank. It can, for example, also say something about the quality of the (drinking) water or possible effects for the environment (use of HCFC's for example).

To streamline the process later on, also various technical data, like dimensions, can be asked immediately when asking for offers of suppliers.

## 4.2 The installation of solar water heaters

Installers often constitute a difficult part of market promotion activities for solar water heaters. Especially in an economy where there is enough work for installers, installers are not always inclined to enthusiastically promote a relatively new product that they have to learn to install, with an unclear demand and an unclear margin. Therefore especially for countries with a newly developing solar water heater market and sales directly to customers (instead of, for instance, sales to construction companies) installers should be involved in a good way in a solar water heater campaign.

Arguments for an installer to take part in a solar water heater campaign can be:

1. Direct increase of work and sales (also of conventional heaters) in a limited period and/or a limited region
2. New regular customers
3. Free publicity and promotion
4. Free education on installing solar water heaters (if provided in the campaign)
5. The possibility to distinguish in a positive way by selling renewable energy
6. Obtaining experience with the installation of new heating technologies – in the future, other new products like heat pumps and low temperature heating installations can be expected to enter the market.

Concerning the installation of solar water heaters, three issues are of major importance:

1. Quality of the installation work
2. Price
3. Positive attitude of installers towards solar water heaters

#### ***4.2.1 Quality of installation***

For most installers in Europe, installing a solar water heater is not yet standard work, and therefore mistakes are still made. This, most of the times, results in solar water heaters that are not working as well as they could. As indicated before, it is very important to the market that solar water heating systems operate as expected.

Sometimes the solar water heater can be damaged by bad installation work and in exceptional case large damage is caused by water leakage. For more information see also 5.2.

#### ***4.2.2 Price of installation work***

The price of the installation of a solar water heater constitutes a significant part of the total price for a solar water heater. In a campaign where specific systems and/or installers are promoted, it is therefore important to control the installation price.

Because of the aforementioned advantages for installers to participate, the organiser of a solar water heater campaign should be in a position to attract installers, wanting to take part in a campaign. Of course, when selecting, all installers should work for the same prices under the same conditions. Often the organiser of the solar water heater campaign fixes that price. The determination of the height of the prices for installation is a delicate matter. If the prices are too low, too little installers will be prepared to take part in the campaign or if they do, they give low priority to the campaign activities. If the prices are too high, the interest of consumers decreases. As mentioned, it is important also to agree upon prices for non-standard work, otherwise this can become a money-spinner for the installer.

#### ***4.2.3 Positive attitude of installers toward solar water heaters***

There is a risk (as practice shows in several campaigns) that installers take part in a solar water heater campaign to sell both solar water heaters and conventional boilers, but, to the leads they get, sell far more single heaters than solar water heaters or packages of solar water heaters and boilers.

This can partly be prevented by not only teaching installers how to install solar water heaters, but also how to sell them. This should include pointing out sales arguments (advantages of solar water heaters) and how to bring these to the customer. A good approach is to register and compare the sales results of all installers involved in a campaign and to confront them with each other's results. If applicable, the installers with the worst results can be left out from future campaigns.

### 4.3 The information and sales process

A crucial aspect of a solar water heater campaign that promotes or sells actual products is not to lose the people whose interest for a solar water heater is aroused due to the campaign. This implies that the campaign should provide:

1. A clear, easy to reach, campaign centre where information can be obtained and a quotation for a solar water heater can be asked for.
2. A clear, convenient path for the consumer starting with the first publicity up to the installation of a solar water heater and application for subsidies.
3. Fast and clear responses to all requests of consumers.

Point two can also imply that if building permits are necessary, it should be agreed upon with the municipalities involved, that they are dealt with in a fast and easy way or even (partly) not be compulsory. Sometimes the application for subsidies can be eased a lot by doing the paperwork for the customer or even deduct the subsidy from the price of the solar water heater to the customer and taking care of the subsidy centrally. The least a campaign organiser can do is to send all forms necessary together with an instruction, and provide assistance upon request.

Point three doesn't only imply that employees who answer the telephone are well informed and requested documents are sent as fast as possible, but also that installers make appointments with customers within settled periods of time and don't delay the process in any other way. For this purpose the progress should be monitored and action should be taken if there are installers that have too many customers waiting.

## 5 Quality control

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*As mentioned in the previous chapter, it is of paramount importance that a high quality level of products and installation work is ensured, so that the confidence of consumers in solar water heaters is increased, not damaged. In this chapter it will be discussed what quality requirements should be met and how these can be implemented. The main ways to control the quality of the products (solar heating installations and components) and of the installation work are discussed.*

### 5.1 Quality of solar heating products

In the past, the quality requirements that have been put on solar heating products differed per country and sometimes even per region. This means that it was not easy for a customer or a campaign organiser to obtain objective information on the available products. Also manufacturers have spent large amount of time and money on testing and approval costs. This situation is now changing, although slowly, with the arrival of European quality requirements in a set of CEN Standards and the European Solar Keymark label.

Despite the Solar Keymark and other certificates, standards and tests it is in general a good idea not to sell completely newly developed solar water heaters in a large solar water heater campaign. It is better to have new solar water heaters prove themselves in practice on a small scale so as to avoid the risk of disappointing a large number of consumers and damaging the reputation of a large campaign and of solar heating in general.

If selling rather new solar water heaters in a project it can be wise to demand additional guarantees. Guarantees are another way to get a grip on the quality of solar water heaters in a campaign. The longer the period of guarantee the more confidence the supplier seems to have in his product. Guarantee definitely is an issue to take into account while selecting or negotiating on solar water heaters in a purchase tender (see also below)

#### 5.1.1 CEN Standards [3], [4], [5]

Published in 2001, a set of European standards on solar heating products has been published. These European standards provide a common base of quality requirements and test methods for



- ☀ Solar Collectors [3],
- ☀ Factory Made Systems (solar water heaters that are brought on the market as standard 'kits') [4] and
- ☀ Custom Built Systems (solar heating installations that are assembled and designed for a specific location, both single-family and large installations) [5].

The standards contain quality requirements, connected quality tests and performance tests to determine and report the output of collectors and solar water heaters. Systems that comply with these standards can be expected to have a good quality level and their performance is presented in ways suitable for objective comparison. Compliance to these standards is therefore a good indication of the quality of products throughout Europe. All European countries are obliged to adopt these standards as national standards and discard conflicting national standards, and many have already done so.

As these European standards will also be the base for the European ‘Solar Keymark’ certificate (see below), their role in the market is bound to grow further.

Campaign organisers are advised to refer to these standards and/or to the Solar Keymark when selecting products to be promoted and/or sold in a campaign, subsidy scheme or market action.

The CEN secretariat is located in Brussels [7] and all national Standardisation bodies are members.

### ***5.1.2 The Solar Keymark***

The European Keymark for solar thermal products, called the Solar Keymark, is a European certificate to select quality solar collectors and systems conforming to the European standards [7]. The Solar Keymark is the result of a voluntary certification scheme supported by the European solar industry associations ESIF and ASTIG. The scheme is operational from the beginning of 2003. The basic elements in the certification scheme are:



- Certificates are delivered by empowered certification bodies
- Test reports are delivered by accredited test laboratories
- The products are delivered by licensed manufacturers fulfilling the requirements for factory production control

The CEN certification mark - The Keymark - is a general voluntary mark, developed by the European Committee for Standardisation (CEN). The clear and simple message of The Keymark is that the product complies with the European Standard(s) covering the product.

The Solar Keymark will be issued in combination with a co-operating national certificate; national certificates are adopted / developed in the framework of this co-operation.

### ***5.1.3 National certificates, guidelines, test reports***

National certification schemes / quality labels exist or are being developed that can be used to judge the quality of products. Some of them fulfil the requirements for the Solar Keymark. Also other guidelines for quality assessment may be available and local test institutes often issue test reports. As the Solar Keymark is now in its development phase, these local certificates are recommended as quality determination tools in campaigns.



An overview of important national / regional certificates:

- ☀ In Austria the Austrian ecolabel: "Das Österreichische Umweltzeichen" is in operation. Adopting the Solar Keymark is under consideration.
- ☀ In Belgium the "Walloon Code of Conduct" includes the product certification scheme. There is a list of certified products. The new national branch organisation BelSolar uses strict quality criteria for the products of its members.
- ☀ In Denmark certification schemes for solar thermal products has been operated in the period 1981 - 2001 by the Danish Solar Energy Centre. Right now the scheme is being reorganised. There is a list of certified products.
- ☀ In France, the Scientific and Technical Centre for Building (CSTB) operates certification schemes for solar thermal products. Guidelines have been published to define which products could benefit from the public support. There is a list of certified products.
- ☀ In Germany, DIN CERTCO operates the certification scheme for solar collectors. Like the Solar Keymark, the scheme is based on the European standards.
- ☀ In Greece, there is no fully developed certification scheme for products, but they have to fulfil the requirements listed in "Greek Standards", which are based on the European ones. Most likely the Solar Keymark Scheme will be adopted when ready by the end of 2002.
- ☀ In Italy, in order to qualify for the upcoming regional subsidy programmes starting in spring 2003, collectors must be tested by an accredited European testing laboratory. Starting in 2004, collectors will have to comply with CEN standards and the manufactures are required to be ISO 9000 certified. In parallel to this, the Italian solar industry association Assolterm, has introduced a new quality label for suppliers and installers of solar heating systems, the so called "Solar Pass" and "Solar Pass Installa". In the long run, harmonisation with the European Solar Keymark is planned.
- ☀ In Portugal a certification scheme is in preparation at INETI and will be based on the European Standards and include the requirements in the Solar Keymark scheme.
- ☀ In Spain there is an ongoing certification scheme with Spanish standards for solar products performed by INTA.
- ☀ In the Spanish region of Catalonia, the Association of professionals of renewable energies (APERCA) in collaboration with ICAEN has developed a voluntary quality certificate.
- ☀ In the Netherlands, TNO has developed a product certificate that is connected to the Keymark.

## 5.2 Quality of installation of solar water heaters

Installing a solar water heater is not extremely difficult. However, it is a new technology that requires some extra attention or actions. Small mistakes in installation can strongly influence the performance or the lifetime of the solar water heater.

The first step to increase the quality of installation is to organise courses for installers. This can be a separate activity, but in campaigns where solar water heaters are directly sold and installed, installers can receive a course as a part of the solar water heater campaign. It is an option to have the courses organised by the suppliers who are able to give the best instructions of how to install their products. This will have a lasting effect beyond the scope of the campaign.

In further developed markets where the number of installers with experience in solar heater installation is high, a campaign could only accept or promote the services of installers who can show that they have taken (official) courses and are experienced in installing solar water heaters.

A third option to improve the quality of installation is to provide the buyers of solar water heaters with technical checklists that enable them to check whether their solar thermal system has been correctly installed. Checks on correct installation can also be done by (or on behalf of) the campaign organisation, for instance by sampling one out of every 10 installations.

Some solar water heaters are provided with gauges or indication lights that give a warning on major malfunctions, so that major problems can be detected. Another option is to include performance-monitoring equipment with the solar water heaters. Disadvantage is that it takes some knowledge and effort to be able to tell whether the yield is as high as it should.

### 5.2.1 *Altener Qualisol project*

In the framework of the EU Altener program, the Qualisol project has worked on an improved and broadly disseminated installer qualification specialised on solar heating systems in the participating countries, leading to an increased know-how of installers, improved quality and a larger number of qualified solar heating installers. The project has partners in Italy, Portugal, Germany and the Netherlands and has been concluded in November 2002.

The final summary of the project can be downloaded from the Soltherm web-site: [www.soltherm.org](http://www.soltherm.org).

### 5.2.2 *Other quality criteria for installers*

While selecting installers to take part in a solar water heater campaign it is wise to request information about:

1. Number of solar water heaters installed (experience and attitude)
2. Courses taken (names of employees)
3. Capacity available for the campaign

4. (Planned) reaction time to leads
5. Number of employees (continuity)
6. Terms of delivery, guarantees
7. Conformation to campaign prices and conditions

### **5.3 Guarantees, Guarantee of Solar Results, contracting, leasing**

There are several other ways to ensure good quality of products and installation. To start with, suppliers and installers should be asked to give sufficient guarantees on the quality of their products and work. A point of attention is the demarcation between the responsibility of the supplier and that of the installer.

There are also more powerful methods to ensure the complete quality of the installation and its performance. These take most or all risks out of the hand of the consumer and thus motivate the supplier and installer to deliver good quality.

For large solar heating plants, Guarantee of Solar Result (GSR) constructions are often used in some countries, like France and Spain. The energy output of the installation is measured and periodically compared to a minimal acceptable output for the plant. In the comparison process, correction is made for climatic differences and/or differences in hot water consumption. If the minimal acceptable output is not achieved, the customer is financially compensated. This requires a contract between the parties that are responsible for the functioning of the plant, often a hardware supplier, an installer and an engineering company. Often the maintenance is also taken over by these parties, so that they have better control over the quality. This is an excellent way to increase the confidence of the customer, because if the installation does not perform as promised the customer will be compensated. However certain costs have to be made for the measurements and recalculations and there is a higher risk for the supplying parties. For these reasons, GSR is applied mainly on large installations and in markets where the customer confidence is relatively low. GSR is often an important ingredient in lease constructions or other Third Party Financing (TPF) schemes, where the user of the solar heat is not the same party that carries the investment costs.

A variety of TPF is Solar Contracting: not selling the installation, but the heat it produces to the customer. Examples of Solar Contracting can be found a.o. in Austria, Germany and the Netherlands. The customer pays a regular amount that is based on the measured performance of the solar heater. This construction is even applied to complete boiler houses with boilers for space heating and water heating in combination with a collective solar water heater.

## 6 Introduction to campaign examples

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*In this chapter general recommendations are given with the goal to prevent campaign organisers from making the same mistakes that made other campaigns fail. Furthermore it comprises general remarks on how to use the campaign examples of Chapter 7. Models and formats cannot be just applied without critical consideration and adaptation to one's own situation.*

### 6.1 General recommendations

#### *Regional and cultural differences*

The following Austrian example is to demonstrate that campaign models can not always be applied one-to-one in every country.

From 1982 to 1998 self-building-groups were very successful in Austria. Besides more than 400.000 m<sup>2</sup> collector surface arisen through self-build-groups, a fit Austrian solar market could be created through intensive and long lasting public relations work. But as transfer projects to other countries have shown it is not that easy to be successful with the same system somewhere else. Among other aspects certainly factors like different market situations, energy policies and price levels as well as different mentalities of the population play an important role.

#### *Restricted budget*

Some of the national campaign organisers declare that adequate aftercare operations and/or support for the target groups in implementing first pilot- and demonstration projects could have brought positive effects. Unfortunately, this often can not be done within the campaign because of the restricted budget.

#### *Networking*

It is important to involve a maximum of actors in the campaigns, i.e. associations of building trade professionals (installers, architects, etc....). National solar campaigns must be co-operative and participative from the beginning of their conception, in order to make sure that all available important expertise and support is considered and integrated. All levels of the society and the market have to be consulted and accurately involved into an organisational process that grows in a structured manner. The networking, which is very often a hidden and invisible work, is very important to keep up the visible campaigning.

However, to co-ordinate many different actors means also a lot of organisation work, which shouldn't be underestimated. All partners should be integrated in all activities and in the information exchange. It is important to define who is responsible for what and to create a clear and simple organisation structure.

### *Communication*

The conception of a communication program over several years is more than advisable. For a public campaign that carries a social topic of the relevance and complexity of energy the targets must be very clear, not only within the internal partner circle, but also towards media and social actors outside. Therefore, the communication of the targets and the central messages must be very precise and accurate (avoid spreading unrealistic expectations, they usually fall back on to the emitter). When carrying out a campaign involving a lot of partners, make sure that you provide them with centrally designed but customisable marketing tools to enable them to easily spread and multiply the central messages as well as to individually adapt and use communication instruments.

### *Project management*

The project co-ordinator must secure an impartial, objective and participative decision making process as well as provide a transparent and professional project management. Interaction, moderation and mediation capacities in terms of personnel and time should be sufficiently considered in the project plan. Always ensure that there is enough professional, full-time personal in charge for the co-ordination. Finally, co-ordinating the establishment of (big) social networks that foster social innovations requires endeavour, convincing power and patience, as well as policy, mediation and conciliation skills.

### *Time and market*

The German campaign “Solar – na klar!” clearly showed the success factor “time”. There were several developments in the region before the start of the campaign, which clearly indicated that “the time was right”.

The Solar Water Heater Campaigns in the Netherlands are always held in the months March till June and September till November. In these periods you have the natural moments of the start of sunny weather and the replacement of the condensing heaters. The campaign itself lasts approximately three months.

The criteria that define a solar initiative in a geographical sense can be very different. You can decide to start the campaign in one or more cities, municipalities, regions etc. Be sure that the market has the right size for your campaign. In the German campaign “Solarenergie kommt!” for example the region of Hannover was neither too big nor too small including a major city of 500,000 as well as rural surroundings with 12 minor municipalities. However, an “optimal” size for a solar initiative does not exist.

An important consideration is that the promotion should guide the consumers through several phases of familiarity and motivation, as described in 3.3.5.

### *Role of manufacturers and installers*

Since solar campaigns always deal with industry products, it is certainly a good idea to involve the manufacturer and the installer organisations. In Austria, the co-operation of adult education institutions has proved to be very effective. By arranging the lecture for

installers to be presented by a local citizen who knows everyone in the area, the fear of the unknown is largely overcome and a great interest results.

### *Quality*

In large-scale projects only use systems which have been proven to be reliable in projects for several years. Define good selection criteria for the solar water heater systems and for installers in the preparation phase. Monitor the results of the campaign weekly so that changes in the publicity plan can be made on time. See also Chapter 5.

### *Dialogue*

Regarding the domestic sector large scale advertising campaigns (tv, press) can take place with significant success, if they take into account and underline the environmental impact and the consumer comfort. A promotion campaign can actively create demand for solar water heaters, if the promoters are able to approach and motivate the citizens in the right way. Solar initiatives should be based on strong environmental and social principles and intend to create a direct relation and an open dialogue with the consumer, who often is the real protagonist of the campaign.

### *Framework conditions*

The existence of financial incentives and a labelling of solar thermal equipment could assist the sales development and consequently the research and development on solar technology. When operating with administrative authorities try to make the use of a solar water heater mandatory.

An original initiative has been taken in the Belgian Walloon region: the renewable energy campaign there features ‘facilitators’, one individual for each renewable energy technology. Their mission is to facilitate and stimulate the development of the market of that technology through central independent information expertise, bringing together actors, advising the government on priority actions and so on. No evaluation is yet available.

It is also often worth trying if the authority is interested in sponsoring a campaign by means of a special subsidy; see also Chapter 3.

## **6.2 How to choose a campaign example**

The Campaign Examples of Chapter 7 provide the best information about campaigns of more than a decade in European countries. However, once more, experience has proven that campaign replications often do not work without change in other places or circumstances. Therefore, the campaign models should be used with caution:

- ✿ Select one or more models that seem most applicable to your situation
- ✿ Consider them critically; check for points in which your present situation differs from the situation for which the model campaign was successful
- ✿ If necessary, combine elements from different models
- ✿ Take contact with the parties involved in the chosen campaigns.

- ☀ Check recommendations and guidelines, success and failure factors from this and other chapters, for possibilities to improve the campaign concept.
- ☀ Check the on-line tools database for useful tools and additional information for the campaign concept.

### 6.3 Experiences from the campaign examples

Success factors for campaigns can be categorised in four groups:

- ☀ Public awareness
- ☀ Availability and accessibility of products and solar installers
- ☀ High quality
- ☀ Regulatory framework: legal, institutional and financial incentives.

In the following paragraphs, the most important success and failure factors of the model campaigns are analysed. This provides good input for designing new campaigns.

#### 6.3.1 *Public awareness*

##### *Communication*

If more than one decision maker is included, it may take long before a consensus is reached. Also, for the different decision makers different arguments may play a role and therefore the communication must be very flexible. Especially, if for example in a municipality the choice of a SWH is not mandatory, the property developer has to be convinced with other arguments.

Take care that all communication activities are synchronised and the campaign has a clear and consistent appearance (e.g. recognition effect through logo).

Include all partners in information and communication activities. It is important to both define who is responsible for the internal and external communication and to harmonise the planned activities.

Concerning the external communication: Devote big efforts on convincing and making people understand solar thermal benefits. The underlining of the consumer comfort through campaigns is often very effective.

In most national markets the following barriers for solar technology exist:

- ☀ lack of awareness
- ☀ insufficient information
- ☀ inadequate qualification and quality of products

During the design of a campaign these and further barriers should therefore be considered. For the planning of contents that will be communicated in the campaign the knowledge of barriers is important to find counter-arguments. For example:

*Barrier:*

Lack of information  
Lack of know-how of planners  
Optical appearance

*Counter argument:*

Information package  
Information, support  
Reference projects, good architectural solutions

*Publicity*

Efficient and intensive public relations work during a short time period and one central information point at a time for the clients are strong points of campaigns. Make sure to devise a long term topical PR-plan, that provides several well dosed culmination points that assist the other campaign instruments and activities.

You should keep in mind that an important aspect of public relations is to raise the awareness of the clients and cause acceptance for solar energy. All activities should be already planned in the forefront of the campaign. Both financial means and qualified staff (if possible also involve external experts) are required.

*Environmental awareness/Image*

Low environmental sensitisation can cause the failure of a campaign. A previous analysis of the target and market potential can avoid false assessment of the communication axes and requirements by campaign managers.

Do not only focus on rational arguments or technological attributes why someone should buy a SWH. Include emotional aspects and try to create a kind of “life style” which is associated with solar energy. For example the image creation of an “environmental friendly” industry gives an added value.

*Aesthetics*

Sometimes integration of solar thermal technologies in the architecture can pose an obstacle in promotion campaigns. The aesthetics of the products promoted should therefore be taken into account using attractive photo material showing aesthetical solar building integration examples.

*Price*

A solar campaign should aim at designing the investment for a SWH in a way that clients are willingly to pay it. One-dimensional discussions of the price should be avoided and be replaced through an appealing communication with the client who emphasises the life-style aspects and added value of solar technology.

Furthermore tax reduces or other financial benefits are a great plus for encouraging campaign results.



### *References, testimonials*

Most people are imitators, before they start something new they ask for references. Therefore it makes sense to promote successful, interesting reference projects which can serve as models.

The Catalonian campaign “Replication of Solar Ordinance” showed that once the first two solar ordinances were approved, the rest of municipalities started to think of replicating the same in their towns. The result was that four more municipalities had approved a solar ordinance based on the Barcelona’s one but adapting it to its own characteristics. Recommendations of persons who already have experiences with solar energy can be very convincing. Also statements of credible personalities or celebrities who vote for solar energy can support a campaign efficiently.

### *Regularity*

The activities of a campaign should stretch across a big enough time period to ensure a sensible attendance of the clients through their decision process. A continuous communication during a solar initiative means also continuous orders for the involved installers. The scale and regularity of orders (typically over a period of a year or longer) can also result in lower manufacturing costs.

A large project also offers the opportunity for systematic control of the quality of installation. Training is worthwhile for the installer, and the repeated installation causes a learning effect.

### *Follow up actions*

With a budget and ideas for a follow up some of the campaigns could have been much more successful and long lasting.

In general it is recommended to aim at a continuous communication to avoid information gaps or to fall behind with the campaign. As already mentioned in Chapter 3 the decision process of clients to purchase a SWH can be very long. A long-lasting campaign and follow up actions ensure the success of the initiative.

## ***6.3.2 Availability and accessibility of products and solar installers***

### *Products and Quality*

Take care that the producers and products advertised during a campaign are of high quality and easy available.

When offering solar systems previously selected by the campaign management, focus on a fixed, low price, high quality systems, good availability and systematic quality control. Check opportunities for replacement of the heating system together with installation of the solar system.

### *Installers*

Often the installers are not enough involved in the campaigns. Sometimes installers are also not enough motivated to promote solar energy. In the German campaign “Solarenergie kommt!” the concept of the campaign was not only commercially oriented and thus led to reservations from the installer’s side. In the beginning the same campaign only included members of the local trade guild (Innung). The accreditation of installers included proof of technical qualification, but did not include proving marketing and sales skills.

In general a lack of training of installers causes many problems. To be a success factor for the campaign the installers must be trained, enthusiastic and capable of sales-techniques.

In the beginning of the Austrian self-building groups almost every installer was against the initiative, although only few of them offered solar systems. After some time they realised that a lot of public relations was done within the campaign which led to great interest by one-family-house owners who were not disposed to build a solar system on their own. These „non-self-building-groups“ were then in fact served by local installers. Over the years the price level of solar systems offered by installers sank drastically so that the price advantage for a do-it-yourself-construction was no longer attractive.

### **6.3.3 High quality**

#### *Quality*

In Greece and Italy for example the main obstacle was the implementation of bad industrial solar thermal technologies in the past, when the technological level was quiet inadequate. These projects were the worst promotion for solar systems, making the potential stakeholders distrustful.

Also inadequate labelling was mentioned of being an obstacle.

### **6.3.4 Regulatory framework: legal, institutional and financial aspects**

#### *Framework conditions and market situation*

Both the general situation of the market (e.g. negative trends in the housing market) as well as unfavourable framework conditions (e.g. subsidies) have an important influence on the success of solar campaigns.

#### *Finances*

In general marketing budgets in the solar branch are still too small. To raise money creative ideas are necessary or alliances have to be build. But this can also have some drawbacks as a Dutch example shows: In almost all Dutch Solar water heater campaigns the publicity is done by the municipality itself, because the municipality has its own (free) ways of publicity. This reduces the costs needed for publicity but it also restricts the effectiveness of the publicity. Press releases, advertisements and articles are for instance not always published in the way they had been developed.

### *Subsidies*

The extra subsidy for a solar water heater given by a municipality is sometimes not clear at the start of the campaign. This can be a weak point of the campaign because extra subsidy stimulates the sales of SWH's.

In most campaigns where subsidies were included they turned out to be a decisive success factor for the whole initiative. If subsidies are available, they should be integrated in the campaign and be promoted in all communication activities.

### *Different interests*

It is recommended to involve as many actors as possible in a campaign, but this can also lead to difficulties as interests of different actors may collide. For example: The energy and environmental department of the municipality (which is normally involved) has different objectives than the building inspection department (making profit). The building inspection department normally has more impact on the property developers.

Carefully map out the single motivations of the actors that wish to support the action. Open or hidden rivalries will always threaten the project – a more or less “neutral” campaign co-ordination is very helpful. Always ensure that there is professional, full-time personal in charge for the co-ordination.

To motivate potential partners to participate in the campaign the benefit for each single partner should be identifiable and made transparent.

### *Project plan*

A good project planning throughout the project time is an essential aspect for a successful campaign. The project plan should comprise goals, measures, financial and personnel aspects.

### *Project management*

An efficient project approach and a small decisive project team that consists of fully employed staff are of great importance. One central contact point should be established.

Main tasks of this centre are for example:

- ✿ Organisation and co-ordination of information exchange, meetings etc.
- ✿ Development of concepts for mutual tasks
- ✿ Co-ordination of activities
- ✿ Presentation of the initiative
- ✿ Look for further partners and sponsors
- ✿ Budget planning and management

### *Documentation and controlling*

All activities of a campaign should be documented and evaluated. For a successful continuation of a campaign a regular analysis of all activities is crucial. This helps to reduce and eliminate weaknesses. A systematic evaluation should also include a cost-benefit



analysis.

All positive results and effects of the campaign can be used for public relations work and should be disseminated.

## 7 Campaign Examples

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*In this chapter, a number of important and/or successful campaigns in Europe are presented as examples for use in new campaigns. Each campaign is shortly presented and analysed concerning success and failure factors (both internal and external), and recommendations are given for those who would like to replicate a campaign. In Chapter 6, an analysis of the most important success and failure factors is given.*

### 7.1 Introduction

In the following tables, an overview is given of the campaigns presented in this chapter. They have been grouped into

- National campaigns (Table 1)
- Regional level campaigns (Table 2)
- Local campaigns (Table 3).

Table 1: Overview of campaign examples with a national scope.

<b>Ref.</b>	<b>Campaign</b>	<b>Target groups</b>
7.2.1	'Plan Soleil' (France)	Private house-owners, builders of new buildings, architects, engineers, public collectivities, installers, owners of flats
7.2.2	'Solar – Na Klar' (Germany)	Private house-owners, builders of new buildings, installers, public institutions
7.2.3	Promotion of the use of solar thermal collectors (Greece)	Private house-owners
7.2.4	'The sketch plan scheme' (Denmark <sup>1</sup> )	Public buildings owners, housing associations

Table 2: Overview of campaign examples with a regional scope.

<b>Ref.</b>	<b>Campaign</b>	<b>Target groups</b>
7.3.1	'Solarenergie kommt!' (Hannover region, Germany)	Mainly private house-owners, builders of new buildings
7.3.2	Voluntary sector agreement for the promotion of solar heating (province of Lecce, Italy)	Owners of residential, commercial or industrial buildings, installers, planners

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<sup>1</sup> Could also be used in regions of large countries

7.3.3	Solar Ordinance - replication (Catalonia region, Spain)	Municipalities, builders of new buildings
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Table 3: Overview of campaign examples with a local scope.

Ref.	Campaign	Target groups
7.4.1	Do-it-yourself groups (various in Austria)	Private house-owners
7.4.2	Renewable Energy Day – RED (city of Oederan, Germany)	Private house-owners, builders of new dwellings, housing associations, installers
7.4.3	‘A solar collector on every roof’ (municipality of Monsano, Italy)	Private house-owners, dwellings / condominium administrators, builders of new buildings, installers, suppliers
7.4.4	Project Approach for new housing (various in the Netherlands)	Builders of new buildings, housing associations, installers, architects, municipalities / regions
7.4.5	Solar Water Heater campaigns (various in the Netherlands)	Private house-owners, installers, municipalities

The reader is encouraged to use these campaign examples for new initiatives, but only after analysing his own situation and adapting the examples to that situation. See Chapter 6 for details.

The campaigns are presented as ‘fact sheets’ for quick analysis and comparison. They are grouped into campaigns on national, regional and local (municipalities) level.

## 7.2 Campaigns on national level

### 7.2.1 'Plan Soleil' (France)

<i>Target groups</i>	Private house-owners, builders of new buildings, architects, engineers, public collectivities, installers, owners of flats
<i>Goals</i>	<p>Sensibilisation and information of the public about solar thermal energy and the national program Plan Soleil (actions, subsidies, ...). In 2002, 2003 and 2004, ADEME will like to give a new dimension to this campaign aiming at the following objectives:</p> <ul style="list-style-type: none"> <li>- Extend communication at the national level, while taking into account the maturity condition of the market within each region,</li> <li>- Continue general public awareness campaigns and stimulate solar boiler purchase, without acting as a substitute for the market players</li> <li>- Ensure the promotion of the solar heating applications within the collective type buildings,</li> <li>- Enhance the awareness work aimed at the prescribers and the relay public, namely the general press and the house press,</li> <li>- Federate the installers which have already signed the Qualisol charter,</li> <li>- Implement the promotion of the solar heating individual and collective applications over the year.</li> </ul>
<i>Parties, organisation</i>	ADEME (policy maker, general definition of the aim of the campaign, financial subsidies provider with regional partner), Communication agency ALSBDDP, free number recallers
<i>Strategy, activities</i>	<p>In order to accompany the financial aid scheme of the Plan Soleil, since 2000, ADEME is implementing a strong yet progressive communication and awareness campaign.</p> <p>A first campaign has thus been launched in 2000 over 5 regions; then a second one in 2001, covering 9 regions.</p> <p>The 2002 campaign aimed at the general public on the individual solar boiler (primary target: 35/64 year-old – households belonging to an average/upper socio-professionnal class, owners of their detached house) will be running over two periods (May- June and September – October). It combines a TV-based scheme (commercials on national and regional TV), press operations in papers dedicated to the house and the garden as well as a toll-free telephone platform. Following the telephone contacts or the return of a coupon, material (brochures, small practical guide-books, and list of equipment and installers) will be sent. This campaign is implemented with most of the regions in conjunction with the regional councils.</p> <p>At the same time and to accompany the campaign, specific communication actions will be implemented aimed at prescribers and different re-</p>

	<p>lay public, with 3 separate targets: Architects, engineering offices and companies from the building industry; Local authorities (regional councils, general councils and town councils); Installers (heating engineers/plumbers) and manufacturers. For the building industry professionals, 3 sections have been planned: a professional press campaign in important journals, the creation of an Architect contest, press relations</p> <p>For the local authorities and the partly state-owned bodies of social housing type, and for informing the technical (equipment and environment) managers about the Plan Soleil, and also the elected representatives responsible for providing the impetus, a 3-point plan is also planned:</p> <ul style="list-style-type: none"> <li>☀ A press campaign,</li> <li>☀ A special solar boiler for local authorities kit, associated with materials to be stick in the receiving facilities and a press announcement,</li> <li>☀ Mailing reminding the local authorities special kit will be sent to the main elected representatives in charge of collective equipment and the environment</li> </ul> <p>Emphasis has thus been put on quality on two ways during the elaboration of the Plan Soleil scheme. Through the selection criterion for eligible equipment and by the implementation (and the follow up) of the Qualisol charter. At first, these measures may seem to be restrictive to foreign manufacturers, yet they are the fruit of the previous programmes experiences made for establishing a solar heating market in the building industry in France.</p>
<i>Duration</i>	1998 – 2006
<i>Budget</i>	<p>Financed by Ademe in 2002: 1,8 M€ for TV, newspapers ads and communication tools (major part for TV) (Equivalent amount obtained back with press contacts: 1,28 M€)</p> <p>Indication of prevision for 2003: 1 M€</p>
<i>Results</i>	<p>The second Plan Soleil communication campaign launched in April 2001 in nine regions has reached a large public of private individuals, and also prescribers and owners (namely people in charge of public housings).</p> <p>Over 15 900 useful calls from private individuals made to the tool-free number have been processed within two months.</p> <p>The markets in the targeted regions are rising steeply.</p>
<i>Internal success and failure factors</i>	<p>Intensive, complete approach.</p> <p>Strong quality management. The negative point remaining to date is the persistence of a weak or non-existent number of Qualisol installers in some departments</p> <p>Arrangements of subsidies are still a bottleneck.</p>
<i>External success and failure</i>	<p>Large budget available</p> <p>Strong support by central government</p>

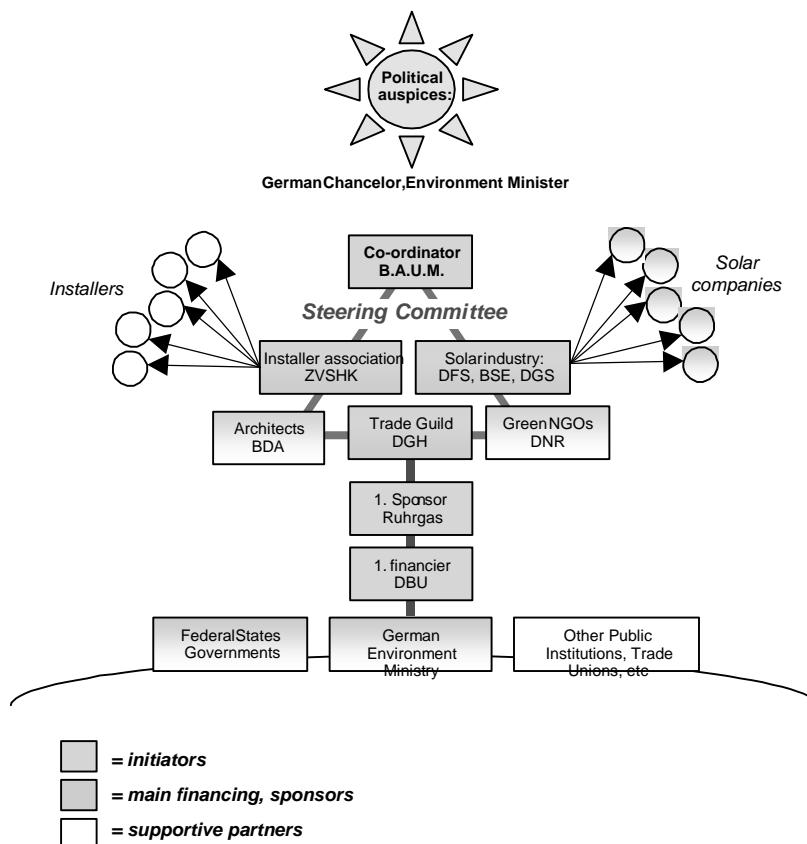


<i>ure factors</i>	Among the restricting points vis-à-vis the private individuals, the persistence of the individual solar boilers' high prices seem to significantly dampen the will to make the purchasing act after a first request of information.
<i>Recommendations for new actions</i>	The previous waves of the Plan Soleil campaign have shown both how difficult it was to implement this type of awareness actions on subjects little-known by the general public, and the need to favour simplicity in the messages, to work towards a continuity in actions. The in-depth work which has begun in 2000 with the implementation of some strong catch points such as the logos, the campaign slogans, the Qualisol chart, the toll-free telephone number will be extended and enhanced over the whole the territory.
<i>Contact Info</i>	M.Patrice Grouzard ADEME Valbonne Phone: 0033-4-93-95-79-00 www.ademe.fr

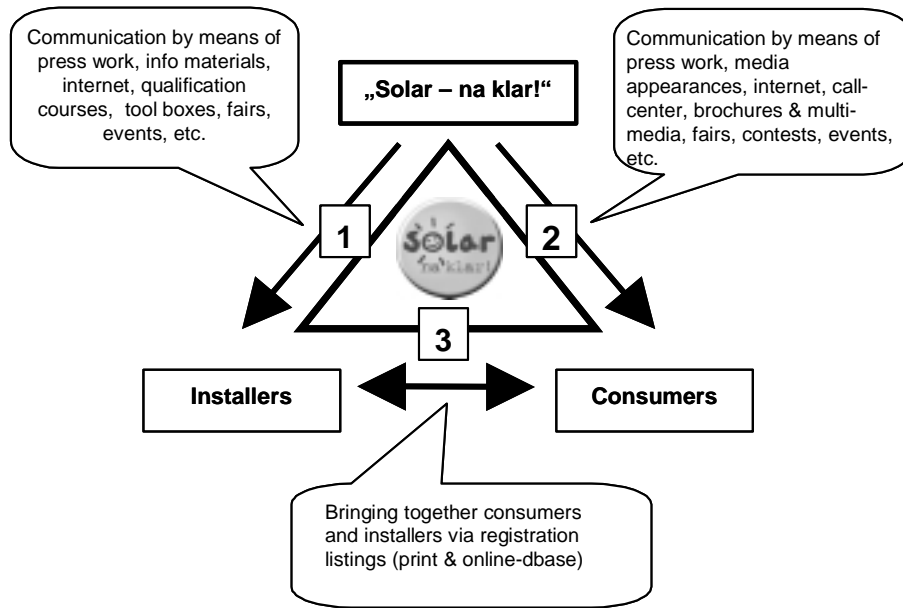
### 7.2.2 'Solar, Na Klar' (Germany)

<i>Target groups</i>	Private house-owners, builders of new buildings, installers, public institutions
<i>Goals</i>	<p>In the second half of the nineties, German markets for solar power and solar heat generation were standing at the brink of a break through. In 1998, B.A.U.M. initiated the solar campaign "Solar, na klar!" as a comprehensive information and direct-action market program to increase the use of solar thermal systems by private households, installers, municipalities and companies. The goal of "Solar, na klar!" was to trigger the awaited boost of demand by bundling all market and social force:</p> <ul style="list-style-type: none"> <li>☀ Stimulation of an uprising spirit and setting out into the solar age</li> <li>☀ Market break-through for solar heat</li> <li>☀ Climate and environmental protection</li> <li>☀ Creation of sustainable employment</li> <li>☀ Raising international competitiveness of German industry</li> </ul>

### Organisational structure of "Solar - na klar!"



<p><i>Parties, organisation</i></p>	<p>The concept to kick-start the implementation of “Solar – na klar!” was provided for by B.A.U.M. (Bundesdeutscher Arbeitskreis für umweltbewusstes Management e.V.). As project co-ordinator, B.A.U.M. e.V. further developed the concept to an operational campaign plan together with the members of the steering committee, two communication agencies and the regional steering board. In the chart, main parties and co-operation structure are given.</p>
<p><i>Strategy, activities</i></p>	<p>The communication strategy was founded on three major pillars:</p> <ol style="list-style-type: none"> <li>1. <u>Expert Program</u> for solar manufacturers, installers, engineers and architects.</li> <li>2. <u>Public Program</u> for house and building owners with comprehensive and free of charge information materials on solar heat.</li> <li>3. <u>Regional Program</u> to tie in and co-operate with regional and local solar initiatives.</li> </ol>
<p><i>Duration</i></p>	<p>Preparation phase: September 1997 – September 1998 Public campaign phase: October 1998 – December 2001</p>
<p><i>Budget</i></p>	<p>The direct overall budget of the campaign amounted to 4,6 million Euro for the time period from April 1998 to December 2001.</p>
<p><i>Results</i></p>	<p>The direct impact of the campaign on the development of solar sales and the market as a whole is difficult to assess exactly; there is an obvious influence of “Solar – na klar!” on the important German solar market increase registered between 1999 and 2001. 130.000 info kits (comprehensive Brochure, VHS-Video, local installer list) were distributed to interested consumers and 100.000 brochures were distributed on fairs and public events. With 8.700 registered installers nation-wide, 20% of the installers were implicated in the campaign action and offered a nationwide qualification and training programme – some see this as success, others would even expect a higher participation level of German installers.</p>
<p><i>Internal success and failure factors</i></p>	<p>“Solar – na klar!” strategically linked the offer side and the demand side of the German solar heat market within a market activation network campaign. The kick financing of Deutsche Bundesstiftung Umwelt (Osnabrück) was crucial. The campaign was directly collaborating with more than 10.000 partners on all levels of society – This helped to compensate and outweigh its extremely limited budget for mass-media advertising action. Through its existence, the campaign was co-ordinated by a full-time employed professional team at B.A.U.M. Hamburg. The task of managing competing interest and multi-lateral decision processes turned out to be complex and demanding; internal conflicts within the steering committee arose and put the campaign under ‘stress’. Synchronising and harmonization processes got quite time consuming.</p>



<p><i>External success and failure factors</i></p>	<p>During the project development process, the public support level for renewable energies was not particularly developed nor did the government see their immediate market potential. Solar companies got increasingly impatient in their starting blocks. These circumstances strongly helped to group the founding members and investors around the initial campaign concept.</p> <p>The solar campaign, the manufacturers and the installer organisations provided steady marketing support for installers to motivate them to engage into solar energies.</p> <p>The planned budget for mass-media advertising action could not be raised from the major solar market players because marketing budgets in the solar branch are still too small. An initially intended broad cooperative communication concept to compensate the inherent budgetary restrictions did not work out. Thus, besides a few PR-highlights, the access to audio-visual mass media remained limited.</p> <p>Beside the sponsor Ruhrgas, no major industry sponsor could be gained to support “Solar, na klar!”. A reason for this is that the communication and image transfer advantage was not compatible enough with the marketing target systems of big consumer brands.</p>
<p><i>Recommendations for new actions</i></p>	<p>National solar campaigns aiming for strong network effects must be cooperative and participative. Carefully map out the single motivations of the actors that wish to support the action.</p> <p>A more or less “neutral” campaign co-ordination is very helpful. The project co-ordinator must secure an impartial, objective and participative decision making process as well as provide a transparent and professional project management.</p> <p>All partners should be integrated in the information exchange. It is im-</p>

	<p>portant to define who is responsible for what and to create a clear and simple organisation structure.</p> <p>The communication of the targets and the central messages of the campaign must be very precise and accurate (avoid spreading unrealistic expectations, they usually fall back on to the emitter).</p> <p>Provide centrally designed but customisable marketing tools for partners to enable them to easily spread and multiply the central messages as well as to individually adapt and use communication instruments.</p>
<p><i>Contact Info</i></p>	<p>Olivier Drücke (campaign initiator, co-ordinator at B.A.U.M. until 07/2000)          Phone: 0049-172-4560065          E-mail: olivier.druecke@door2energy.com</p> <p>Gerhard Stryi-Hipp (director of DFS, now BSi, founding member of the campaign steering committee)          Phone: 0049-30-28482245          E-mail: stryi-hipp@dfs.solarfirmen.de</p>

### 7.2.3 Promotion of the use of solar thermal collectors (Greece)

<i>Target groups</i>	Private house-owners
<i>Goals</i>	The general goal was the promotion of the use of Solar Thermal Collectors.
<i>Parties, organisation</i>	CRES (Co-ordinator) GREEK SOLAR INDUSTRY ASSOCIATION (Principal contractor) PUBLIC POWER CORPORATION (Partner – Supporter)
<i>Strategy, activities</i>	This campaign included two actions: TV campaign & Direct mailing through the bills of PPC. <b>TV action:</b> a TV spot has been produced, aiming at the promotion of the use of solar thermal collectors to the general audience. In parallel, a large press campaign was forwarded in order to strengthen the interest of the general public and to inform the general public from the other EU Member States. <b>Direct mailing action:</b> This involved a campaign for the promotion of the use of solar thermal technologies by disseminating informative leaflets to the general public. This leaflet promoted the use of solar thermal domestic water heaters.
<i>Duration</i>	2 years (1994-1996) in total: - TV campaign on November – December 1994 - Mailing from January – April 1996
<i>Budget</i>	TV action: 150.000 € Advertising action: 73.000 € <b>TOTAL: 223.000 €</b>
<i>Results</i>	The leaflets were disseminated through the bills of the Greek PPC (Public Power Corporation) to 3.500.000 receivers.
<i>Internal success and failure factors</i>	Physically, the campaign setting-up, the internal communication & the execution of the campaign had no problems. We have to point out the since now co-operation between CRES & EBHE as an effective follow-up of this well-done campaign. There weren't enough possibilities for following-up actions or innovative ideas, since the work programme was certain, especially when the circumstances were still favourable for the continuation of such actions. More over and according a final evaluation of the entire campaign, the involvement of a public organisation for the consumer protection such as the Greek Consumer Institute (INKA), could assist for the provision of increased added value of the campaign results.
<i>External success and failure factors</i>	This campaign succeeds especially according to the characteristics of the promoting technology. Solar thermal technologies were finally mature and economically reasonable for purchasing & installation. The pay back period for such investments would be short and of course

	<p>the existence of tax reduce was a plus for encouraging campaign results. Additionally, the underlining of the consumer comfort through the campaign was very effective.</p> <p>The major external weaknesses are concentrated to:</p> <ul style="list-style-type: none"> <li>☀ Low environmental sensitisation (1994-1996)</li> <li>☀ Inadequate labelling</li> <li>☀ Training needs for installers</li> <li>☀ Integration of solar thermal technologies in the architecture.</li> </ul>
<i>Recommendations for new actions</i>	<p>Regarding the domestic sector, which was the target sector of the campaign, a large scale advertising campaigns (TV – press) could take place with significant success, if they take into account &amp; underline the environmental impact &amp; the consumer comfort.</p>
<i>Contact Info</i>	<p>Dr. T. Tsoutsos (Marketing Manager CRES)          Phone: 0030-1-603          E-mail: office@cres.gr</p>

#### 7.2.4 'The sketch plan scheme' (Denmark)

<i>Target groups</i>	Public building owners, housing associations
<i>Goals</i>	To promote the use of solar heating systems in public buildings and in housing organisations. The idea was to overcome the lack of knowledge about solar heating of building owners and administrators and their usual consultants, and to ease the further decision on establishing a solar heating system.
<i>Parties, organisation</i>	Esbensen Consulting Engineers A/S, Project leader, and several other consulting companies.
<i>Strategy, activities</i>	<p>Owners and administrators of public buildings and housing organisations could order a free sketch plan. The sketch plan was performed by a solar heating expert and gave performances and economy for the use of solar heating at the specific building.</p> <ol style="list-style-type: none"> <li>1. Information on the project was given in articles sent to relevant journals</li> <li>2. Interested persons with contact to relevant buildings ordered a one-page application form, which they completed with data of the building and returned to the project administrator.</li> <li>3. The project administrator decided if the application was valid and returned a list of the solar heating experts included in the scheme. (the above companies)</li> <li>4. The applicant chose and contacted an expert from the list</li> <li>5. The expert visited the building and drew up a sketch plan giving performances and economy for the use of solar heating.</li> </ol> <p>The further decision and the work to establish a solar heating system was not part of the project</p>
<i>Duration</i>	3 years.
<i>Budget</i>	113.000 Euro
<i>Results</i>	<p>The result of the project is not yet estimated, but an earlier project from 1991-1994 resulted in that app. 25 % of the buildings having a sketch plan realised a solar heating system.</p> <p>The fraction of middle sized and larger systems compared to single-family systems is estimated to be relatively high compared to other countries as a result of the project.</p>
<i>Internal success and failure factors</i>	The project group consisted of consultants who had solar heating as a business area and therefore were enthusiastic about the project.
<i>External success and failure factors</i>	<p>The project had to be financed by external sources (was financed by the Danish Energy Agency).</p> <p>A weak point might be that there was no follow up after delivery of the sketch plan.</p>





<i>Recommendations for new actions</i>	It is recommended to continue/duplicate the action.
<i>Contact Info</i>	Lotte Gramkow Esbensen A/S Møllegade 54-56 6400 Sønderborg Denmark

### 7.3 Campaigns on regional level

#### 7.3.1 'Solarenergie kommt!' (Hannover region, Germany)

<i>Target groups</i>	Mainly private house-owners, builders of new buildings
<i>Goals</i>	<ul style="list-style-type: none"> <li>☀ Increase awareness, information and acceptance of solar thermal, and later on also photovoltaic, technologies.</li> <li>☀ Kick-start the market in the region</li> <li>☀ Offer advisory services for consumers and training for installers</li> <li>☀ Facilitate internal communication of network members</li> </ul>
<i>Parties, organisation</i>	The concept as well as an ALTENER proposal to kick-start the implementation was provided for by Target GmbH. An initial, strong support came from the municipality association (Kommunalverband), the local utility (Stadtwerke) as well as the local trade guild of plumbers (SHK Innung).
<i>Strategy, activities</i>	<p>The campaign was planned according to a yearly marketing strategy and included an advertisement phase, with ads on billboards, TV, radio, cinema and the like. Information material like brochures and flyers were produced and disseminated. There was a call centre with a telephone hotline and a web site. Activities included fairs, smaller events, conferences, lectures, "solar week" as well as one major "solar happening" each year. People were informed about the application possibilities in general, incentives and were given the list of accredited installers. No product information or direct sales activities were included in the campaign.</p> <p>The main conceptual marketing, advertising, and PR expertise was provided for by in-house employees at Target. External services were reduced to printing of material and inserting costs for advertising. In addition to the founding members, who contributed the main financing, partners like banks, trade associations, educational and environmentally oriented initiatives, consumer associations were involved. All these more than 20 additional partners contributed only minor financing, but actively promoted the campaign were possible by providing non-financial support. Through their trade association, the guilds, more than 40 solar thermal and later more than 30 photovoltaic installers were involved in the campaign. In order to participate, they had to complete a 5-day course of training.</p>
<i>Duration</i>	1999 – still ongoing
<i>Budget</i>	Through out the first three years (1999, 2000, and 2001) a budget of 150,000 – 170,000 Euro was spent on campaign activities. The budget was cut down in 2002.
<i>Results</i>	No good data on additional sales available.

<p><i>Internal success and failure factors</i></p>	<p>Strong points:</p> <ul style="list-style-type: none"> <li>☀ Co-ordination by a professional, full-time employed team.</li> <li>☀ Co-ordination by small, privately owned company made it flexible, lean and service-oriented.</li> <li>☀ The kick-financing of ALTENER was very crucial</li> <li>☀ The simple concept of a marketing network and a campaign has proven to be suitable in a rather clear-cut regional setting.</li> </ul> <p>A bottleneck was always the support and involvement of the installers. Their expectations were very high and were disappointed after one year of campaigning. After this “enthusiastic” phase they tended to be reluctant to finance the campaigning or even use the merchandising materials provided by the campaign. The concept of the campaign was not only commercially oriented and thus led to reservations from the installer’s side. At its height, the campaign included more than 70 installers, this number dropped to around about 50 official members, but not more than 15 very active installers at the end of 2001. The campaign from the start only included members of the local trade guild (Innung), because this organisation was founding member and thus was never open to non-members. The accreditation of installers included proof of technical qualification, but did not include proving marketing and sales skills.</p>
<p><i>External success and failure factors</i></p>	<p>Well-sized region for campaign. Environmentally friendly technologies and energies are quite widely accepted in the administrative and commercial sector of Hannover, partly due to the event of the World Exhibition EXPO in the year 2000. There were several developments in the region before the start of the campaign, which clearly indicated that “the time was right”. The municipal association implemented a major climate protection scheme (KLEX) and the local utilities founded a climate protection fund (proKlima), which launched several financing schemes directed to private investors.</p> <p>After the EXPO year of 2000, the enthusiasm and political support for these kinds of activities lessened. However, in 2002 the Klimaschutz-agentur Hannover Region (Climate Protection Agency) was founded and took on the campaigning after three quite successful years. The change in the structure as well as cut down in budgets led to a weakening of campaign activities. The novelty of such a campaign has obviously worn out and more thought will need to go into securing support from the involved partners in order to re-vitalise commitment. This would certainly include a focus on the installers.</p>
<p><i>Recommendations for new actions</i></p>	<p>Carefully map out the single motivations of the actors that wish to support the action. Open or hidden rivalries will always threaten the project – a more or less “neutral” campaign co-ordination is very helpful. Always ensure that there is professional, full-time personal in charge for the co-ordination.</p>



<i>Contact Info</i>	<p>Andreas Steege (campaign initiator, co-ordinator 1999-2001) Phone: 0049-511-90968830 e-mail: <a href="mailto:steege@targetgmbh.de">steege@targetgmbh.de</a></p> <p>Marion Schönherr (campaign co-ordinator 2000, 2001) Phone: 0049-341-3061990 E-mail: <a href="mailto:mail@marionschoenherr.de">mail@marionschoenherr.de</a></p> <p>Christoph Urbschat (campaign initiator, co-ordinator 1999) Phone: 0049-392-4628693 E-mail: <a href="mailto:cu@eclareon.com">cu@eclareon.com</a></p>
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### 7.3.2 Voluntary sector agreement for the promotion of solar heating (province of Lecce, Italy)

<i>Target groups</i>	Owners of residential, commercial or industrial buildings, installers, planners
<i>Goals</i>	<ul style="list-style-type: none"> <li>☀ Agreement between market actors regarding quality aspects</li> <li>☀ Technical training of planners and installers</li> <li>☀ Raise awareness and provide information to end users</li> <li>☀ Reduce barriers</li> <li>☀ Promote fiscal and financial incentives</li> </ul>
<i>Parties, organisation</i>	All partners of the agreement: Province of Lecce, University of Lecce, 9 provincial municipalities, 2 environmental organisations, 3 syndicates, 7 consumer organisations, 3 manufacturers of solar heating systems and others.
<i>Strategy, activities</i>	<p>Main phases:</p> <p>A – Preliminary actions</p> <p>B – Implementation of the agreement</p> <p>C – Training</p> <p>D – Dissemination</p> <p>Particular attention has been given to correct consumer information, compliance of the installation with legal requirements, durability of components and guardianship of consumer's interest with an installation contract.</p> <p>All participants of the agreement have to respect the following rules:</p> <ul style="list-style-type: none"> <li>☀ Use of certified products;</li> <li>☀ 5 years guarantee on solar collectors;</li> <li>☀ 2 years guarantee on the entire system;</li> <li>☀ Preparation of a plant book describing initial plant parameters (including collector efficiency) and periodical maintenance works.</li> <li>☀ Italian manual for use and maintenance</li> <li>☀ Preparation of a maintenance contract respecting a price list agreed with Energy Agency.</li> </ul>
<i>Duration</i>	1 year.
<i>Budget</i>	Estimated budget: 31 500 Euro.
<i>Results</i>	The additional amount of solar collectors installed due to the campaign can not be estimated.
<i>Internal success and failure factors</i>	This is one of the first broad Italian promotion campaigns for solar heating systems involving many different market actors and end users. The results of this campaign will provide important knowledge for the development of future campaigning activities in Italy. At the time being, however, it is too early to draw general conclusions. Experiences of the first months show the difficulty to actively involve installers within the campaign.

<i>External success and failure factors</i>	Problems still seem to arise from bad experiences with solar heating installations during the 80ies. Here a major effort is necessary during the next months to motivate and train new installers of solar heating systems.
<i>Recommendations for new actions</i>	It is too early to draw general conclusions.
<i>Contact Info</i>	Agenzia dell'Energia di Lecce Antonio De Giorgi Phone: 0039/0832/683801 E-mail: <a href="mailto:info@agenergialecce.it">info@agenergialecce.it</a> <a href="http://www.agenergialecce.it">www.agenergialecce.it</a>

### 7.3.3 Solar Ordinance - replication (Catalonia region, Spain)

<i>Target groups</i>	Municipalities, builders of new buildings
<i>Goals</i>	To increase the implementation of m <sup>2</sup> of solar thermal
<i>Parties, organisation</i>	Municipalities Regional Government
<i>Strategy, activities</i>	<ol style="list-style-type: none"> <li>1) Definition of the local characteristics: housing typology, property, energy consumption, solar radiation, legal frame ....</li> <li>2) Economics of the relevant typologies: ST systems for the derived typologies, costs, estimated production and savings</li> <li>3) How to provide the necessary complementary or accompanying services (suppliers, installers, training promoters, architects, installers, municipal technicians)</li> <li>4) Appropriate financial schemes: conventional and green bank loans, leasing, ESCOs ...</li> <li>5) Proposals to municipalities, regional governments: model of a ordinance, recommendations for the process of implementing</li> </ol>
<i>Duration</i>	As long as wanted.
<i>Budget</i>	Not known.
<i>Results</i>	The additional amount of solar collectors installed due to the campaign cannot yet be estimated.
<i>Internal success and failure factors</i>	<p>To devote big efforts of convincing and making people understand solar thermal benefits, starting a debate and taking the final decision of making compulsory solar thermal in the municipality.</p> <p>To reach a consensus in the municipality and to believe in solar thermal and that it's good for the community may take too long.</p>
<i>External success and failure factors</i>	<p>When there was no solar ordinance in any municipality, it took years until all policy makers at all levels, with the support of solar thermal sector came to a firm decision to go ahead with making compulsory solar thermal energy for new buildings.</p> <p>Once the first two solar ordinances were approved, the rest of municipalities started to think of replicating the same in their towns. The result is that four more municipalities have approved a solar ordinance based on the Barcelona's one but adapting it to its own characteristics, mainly the threshold energy demand above which it's compulsory to install solar thermal. Many others are now planning to approve also a solar ordinance.</p>
<i>Recommendations for new actions</i>	Any solar thermal consultancy company can help the municipality to start such an initiative.



<i>Contact Info</i>	ICAEN Mrs Gema Torres i Serra Av. Diagonal 453 bis, àtic 8036 Barcelona Spain Tel: +39 43 6220500 Fax: +34936220501 E-mail: <a href="mailto:renovables.icaen@menta.net">renovables.icaen@menta.net</a>
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## 7.4 Campaigns on local level

### 7.4.1 Do-it-yourself groups (various in Austria)

<i>Target groups</i>	Private house-owners
<i>Goals</i>	Wide implementation of competitive but high quality solar systems
<i>Parties, or-organisation</i>	Started from grassroots, AEE INTEC (itself a result of the groups) has co-ordinated many other groups. Co-operation with other organisations (environmental, energy saving groups, agricultural colleges, ÖAR, adult education classes)
<i>Strategy, activities</i>	Wide implementation of competitive but high quality solar systems, widespread, independent community lectures about the use of solar energy, visits to installations, with the opportunity to discuss experiences with the users, sizing the system, setting up groups with 10 - 50 members, absorber production, technical and organisational backup for groups during construction and installation.
<i>Duration</i>	Duration of 1 group: 6 months
<i>Budget</i>	In the beginning this initiative was carried out by a group of idealists free of charge. Later on these groups were supported by different official institutions.
<i>Results</i>	By the end of 1997, about 42.000 solar devices with a total collector area of approx. 400.000 m <sup>2</sup> had been installed by use of the strategy described above.
<i>Internal success and failure factors</i>	The co-operation of adult education institutions has proved to be very effective. By arranging the lecture to be presented by a local citizen who knows everyone in the area, the fear of the unknown is largely overcome and a great interest results. The effectiveness of this approach is indicated by the fact that from 10 lectures an average of 8 groups are formed, each with a membership of between 10 and 50 people. According to the results of a survey commissioned by the Austrian Ministry for Science and Research, 91% of all solar system users said that they would, under present circumstances, be prepared to construct another system through a self build group.
<i>External success and failure factors</i>	In the beginning of these self-build groups almost every installer was against the initiative, although only few of them had solar systems under offer. After some time they realised that a lot of public relations was done within this campaign which led to great interest by on-family-house owners who were not disposed to build a solar system on their own. These „non-self-build-groups“ were then in fact served by local

	<p>installers. Over the years the price level of solar systems offered by installers sank drastically so that the price advantage for a do-it-yourself-construction was no longer that attractive. Moreover, after a campaign period of almost 15 years the potential of strenuous self-builders was somewhat exhausted. Both aspects were responsible for a decrease of demand of self-build-systems and an increase of effort to fund new self-build-groups. In the end nineties the organisational activities of this initiative almost stopped. A few organisations still carry on solar-self-building on a small scale. Therefore in the year 2001 yet nearly 6.000 m<sup>2</sup> collector surface area in Austria was built by self-build-groups.</p>
<p><i>Recommendations for new actions</i></p>	<p>In Austria solar do-it-yourself-groups were very successful. Besides more than 400.000 m<sup>2</sup> arisen through self-build-groups, a fit Austrian solar market could be created through intensive and long lasting public relations. It is not easy to explain why exactly this model worked so well in Austria. As transfer projects in other countries have shown it is not that easy to be successful with the same system elsewhere. Among other aspects certainly factors like different market situations, energy politics and price levels as well as differences in mentality of the population play an important role.</p>
<p><i>Contact Info</i></p>	<p>AEE INTEC          Feldgasse 19          A-8200 Gleisdorf          Phone: 0043-3112-5886          Fax: 0043-3112-5886-18          E-mail: office@aee.at</p>

#### 7.4.2 Renewable Energy Day (Oederan, Germany)

<i>Target groups</i>	Private house-owners, builders, housing associations, installers
<i>Goals</i>	Sensitisation and information
<i>Parties, organisation</i>	The idea for this campaign originally comes from the City of Oederan (Saxonia). But now the Renewable Energy Day (RED) is held in many cities and municipalities. Normally, local authorities and NGO's are working together. The City of Oederan is co-ordinating the activities.
<i>Strategy, activities</i>	Every year on the last Sunday in April owners and runners of renewable energy plants present their plants to the public and citizen can get information about renewables directly from the experts: the owner and the installer. Often there are exhibitions, presentations and lectures about different 'renewable energy topics'.
<i>Duration</i>	One day from 10:00 to 16:00, regularly every year
<i>Budget</i>	Most work is voluntarily done, therefore it is not possible to give exact details about the costs. But for sure it is a low-budget promotion activity: public relation is prosecuted by newspaper articles and some special (cheap) publications, but there are costs like postage and telephone.
<i>Results</i>	The additional amount of solar collectors installed due to the campaign can not be estimated.
<i>Internal success and failure factors</i>	<ul style="list-style-type: none"> <li>☀ Citizens are interested in renewables but in general there is a lack of information about facts and mistrust. So the RED meets the needs of citizen.</li> <li>☀ The campaign is very cheap</li> <li>☀ It's a regular event</li> <li>☀ The idea was new and innovative</li> <li>☀ The campaign shows best practice directly – it is not talking about things but showing that things work</li> <li>☀ Many actors are involved, control over the actions might get lost, if there is no bundling of actions and support of the local authority</li> </ul>
<i>External success and failure factors</i>	<ul style="list-style-type: none"> <li>☀ General economic conditions</li> <li>☀ Legal framework for the implementation of renewables</li> <li>☀ Parallel actions on this day</li> </ul>
<i>Recommendations for new actions</i>	<ul style="list-style-type: none"> <li>☀ Combination with financial incentives by the local authority for the summer period, weaving in a long-term concept and combining with basic information on renewables in advance.</li> <li>☀ Co-operation with installers</li> </ul>
<i>Contact Info</i>	Stadtverwaltung Oederan Mr. Ohm Markt 5, 09569 Oederan Phone: 0049-372-9227-100 Fax: 0049-372-9227-270

### 7.4.3 'A solar collector on every roof' (municipality of Monsano, Italy)

<i>Target groups</i>	Private house-owners, dwellings / condominium administrators, builders of new buildings, installers, suppliers
<i>Goals</i>	To raise awareness among the citizens about the importance to contribute to environmental protection and to inform about the potential benefits of solar water heaters. Installation of a large number of systems. On the longer run, the co-operative MonsanoInforma intends to extend the campaign to other municipalities all over Italy.
<i>Parties, organisation</i>	Municipal co-operative MonsanoInforma srl, that in particular manages the relationship with citizens. The Agenzia per il Risparmio Energetico srl (Energy Agency) of Ancona is the technical advisor. The Province of Ancona supports the initiative and finances the information campaign, in particular the feasibility study.
<i>Strategy, activities</i>	The main steps of the campaign are: <ol style="list-style-type: none"> <li>1. Information of citizens of Monsano and collection of a two page questionnaire (motivation, existing infrastructure, heating costs, etc.);</li> <li>2. Mailing of detailed information to interested citizens;</li> <li>3. Collection of the adhesions and successive definition of number and type of required SWH systems;</li> <li>4. Call for tender, selection of best offer, proposal to buyer group;</li> <li>5. Possible training of local installers, in co-operation with selected supplier;</li> <li>6. Selected supplier and installers present definite offer to each buyer;</li> <li>7. Each buyer decides if he wants to purchase the system;</li> <li>8. The co-operative orders all systems on behalf of the buyers as a package;</li> <li>9. Quality checks of selected installations and guaranteed maintenance by the Energy Agency.</li> </ol>
<i>Budget</i>	Province of Ancona granted 20.000 Euro for the awareness and information campaign, in particular for the realisation of the feasibility study.
<i>Results</i>	The adhesions of the citizens are already relatively numerous (about 40).
<i>Internal success and failure factors</i>	The campaign is in the course of realisation, therefore it is not yet possible to assess weak and strong points of this specific case. However, this campaign approach is a good and encouraging example of how a promotion campaign can actively create demand for solar water heaters, if the promoters are able to approach and motivate the citizens in the right way. The initiative is based on strong environmental and social principles and it intends to create a direct relation and an open dialogue with the consumer, who is the real protagonist of the campaign.

<i>External success and failure factors</i>	It is too early to draw conclusions as the campaign is in the middle of its course.
<i>Recommendations for new actions</i>	The co-operative MonsanoInforma intends to extend this initiative beyond the municipality, aiming at a national dimension.
<i>Contact Info</i>	<p>www. villaggiotelematico.it/pannellisolari.htm  Monsanoinforma srl: 0039-0731-60966  Agenzia per il Risparmio Energetico srl (Ancona): 0039-071-2077575</p> <p>Ambiente Italia  Mr Martin Ménard  Via Carlo Poerio 39  20129 Milano  +39 02 277440</p>

#### 7.4.4 Project Approach for new housing (various in the Netherlands)

<i>Target groups</i>	Builders of new buildings, housing associations, installers, architects, municipalities / regions
<i>Goals</i>	Increasing the market, high quality systems, lower price, knowledge transfer. For each project a clear target of number of installations is set.
<i>Parties, organisation</i>	If initiator is a municipality: Utility, technical support and subsidies. Consultant for expert knowledge on procurement, integration in building designs, evaluation of suppliers and installers offers. If initiator is an utility: Municipalities, contacts with and network of property developers. Consultant for expert knowledge on procurement, integration in building designs, evaluation of suppliers and installers offers.
<i>Strategy, activities</i>	The 'project approach' is a demand-side action. The primary cost reduction is achieved in the cost of sales (one contract for a large number of systems) and installation (efficient layout of connections, streamlining of the process). The scale and regularity of orders (typically over a period of a year or longer) can also result in lower manufacturing costs. A large project also offers the opportunity for systematic control of the quality of installation. Training is worthwhile for the installer, and the repeated installation causes a learning effect. This learning effect turns out to be an important side effect of the 'project approach'. It appears that, once acquainted with Solar Water Heaters, project developers, housing associations, architects and contractors incorporate Solar Water Heaters in future building activities more easily.
<i>Duration</i>	Preferable start in the plan phase of a new building development. Duration of the project depends on the completion of dwellings, however the most important phase is the designing phase when the decision is made for the application of the SWH and the SWH is integrated in the design.
<i>Budget</i>	For project with a scale of 300 to +1000 systems a typical budget of € 50,- per system is required for the project consultant. Investment of municipality and or utility hours is normally limited (100 – 150 hours per project).
<i>Results</i>	Installations of SWH in project-wise new construction projects. On several occasions, project developers are motivated to install SWH's in later projects.
<i>Internal success and failure factors</i>	Efficient project approach Small decisive project team The energy and environmental department of the municipality (which is normally involved) has different objectives than the building inspection department (making profit). The building inspection department normally has more impact on the property developers.

<i>External success and failure factors</i>	<p>High quality systems, Low price, Extra subsidies, Systematic quality control</p> <p>The choice for a SWH is not mandatory, so the property developer has to be convinced by other arguments.</p>
<i>Recommendations for new actions</i>	<p>Start the project as soon as possible, preferably in the planning phase. In general the sooner the SWH is introduced, the sooner and easier it will be adopted.</p> <p>In large-scale projects only use systems that have proven to be reliable in projects for several years.</p> <p>Try to make the use of a SWH mandatory</p>
<i>Contact Info</i>	<p>Ecofys          Giel Linthorst          Kanaalweg 16-G          P.O. Box 8408          3503 RK Utrecht          Netherlands          Phone: 0031-30-2808316          Fax: 0031-30-2808301          E-mail: G.Linthorst@ecofys.nl</p>

#### 7.4.5 Solar Water Heater campaigns (various in the Netherlands)

<i>Target groups</i>	Private house-owners, installers, municipalities
<i>Goals</i>	<p>The ‘Solar Water Heater Campaign’ has been developed to assist municipalities and utilities that want to promote solar water heaters in the private existing housing market. Most of these organisations have environmental goals, but also have a lack of instruments, ideas and experience to achieve these goals.</p> <p>Within the campaigns an effective effort has been made to tackle the main market barriers. Within this approach solar technology is offered in balanced packages combining:</p> <ul style="list-style-type: none"> <li>• the economy of scale quality control</li> <li>• high quality solar energy systems and back-up heating systems,</li> <li>• selective marketing focussed on the target group,</li> <li>• financial, logistic, installation and after sales services.</li> </ul>
<i>Parties, organisation</i>	Mainly responsible is an energy utility, municipality or local energy agency. Support by external consultant. During the campaigns there is a close collaboration with local authorities, utilities, suppliers and installers, all under supervision of the consultant.
<i>Strategy, activities</i>	<p>In the preparation phase suppliers are invited to participate in the tendering procedures, and selected on proven quality, price and way of implementation of their system.</p> <p>Local installers are invited to participate and selected on knowledge and experience, price and agreement on how to deal with clients and how to make an offer. During the preparation phase they can learn how to sell and install solar water heaters.</p> <p>During the installation phase the installers are assisted by the supplier who even inspects many of the systems.</p> <p>In this way the Solar Water Heater Campaigns effectively triggers long-term market development. This takes place by the numerous follow-up projects and knowledge transfer to organisations and installers participating in the various campaigns.</p> <p>A key aspect in a Solar Water Heater Campaign is the efficient publicity. First a district with many 10-20 years old private homes is selected. In these districts most of the conventional heating systems have reached the replacement age, which leads to good opportunities for the sale of a new heating system including solar. A general information campaign is started, followed by a mailing to the selected district. One week after the mailing, an information market is organised. From the start of the general campaign until two weeks after the market, people can register for a visit of an expert who checks if their situation is suitable for the installation of a Solar Water Heater and presents an offer. If the offer is</p>



	accepted, the system will be installed. A similar project approach is developed for new housing development.
<i>Duration</i>	Campaigns are always held in the months March till June and September till November. The campaign itself lasts appr. 3 months.
<i>Budget</i>	For a campaign in the province Limburg with 20 municipalities the total budget required was EURO 175.000,- (including EURO 100.000 for subsidies). Related to the goal in that campaign (250 Solar Water Heaters) the budget is EURO 700,- (including EURO 400,- for subsidies) per SWH.
<i>Results</i>	Since 1995 Ecofys initiated, developed and co-ordinated 44 Solar Water Heater Campaigns in which in total app 20.000 solar water heaters are installed. About 100 municipalities, 6 utilities and hundreds of installers participated in the campaigns so far. Due to these SWH campaigns sales in the existing houses market segment have grown from a few hundred to near 5000 systems per year and are responsible for 80% of all sales in the private housing sector at this moment (see figure 2). Ecofys co-ordinates most of these Solar Water Heater Campaigns.
<i>Internal success and failure factors</i>	<p>Key success factors of the campaigns are:</p> <ul style="list-style-type: none"> <li>☀ focus on replacement of heating system</li> <li>☀ fixed, low price</li> <li>☀ efficient publicity in short period and one central information point for the clients</li> </ul> <p>Internal failure factors are:</p> <ul style="list-style-type: none"> <li>☀ The publicity in mostly all campaign is done by the municipality itself, because the municipality has his own (free) ways of publicity. This reduces the costs needed for publicity. But it may also restrict the effectiveness of the publicity.</li> <li>☀ The extra subsidy for a SWH given by a municipality is sometimes not clear at the start of the campaign. This can be a weak point of the campaign in that municipality.</li> </ul>
<i>External success and failure factors</i>	<p>The high subsidy for SWH. In most campaigns three subsidies were added, i.e. subsidy from the government, municipality and energy utility. In total these subsidies can be more then € 1100,-</p> <p>The installers are always an important factor for the success of the campaign. The installers must be trained, enthusiastic and capable of sales-techniques.</p>
<i>Recommendations for new actions</i>	<p>Recommendations to other parties are:</p> <ul style="list-style-type: none"> <li>☀ Define good selection criteria for the solar water heater systems and for installers in the preparation phase.</li> <li>☀ Make a clear publicity plan with all actions that have to be done by all participants</li> <li>☀ Monitor the results of the campaign weekly so that changes in the publicity plan can be made on time.</li> </ul>
<i>Contact Info</i>	Ecofys



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## 8 Soltherm campaign support

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*In addition to these Guidelines, there are several other ways that the Soltherm Europe Initiative supports marketing campaigns for solar heating products. On the central web-site [www.soltherm.org](http://www.soltherm.org), a database of relevant campaign tools and materials can be searched, an overview of standards and certificates in Europe is given, market analysis reports can be downloaded and general information can be found.*

### 8.1 Tools and materials database

As a part of the activities for the Soltherm Europe project a database with campaign tools has been put together. In the database, tools from ten participating countries are listed. The tools vary from reports about past campaigns and campaign strategies to courses for installers to books about solar energy and architecture and from folders and books to of web pages with all kinds of information. The database has a search facility that can be used in a number of European languages. To make searching in the database easier, the tools have been categorised in tool type, user (whom is the tool meant for), for what action is the tool meant, applicable country, in what language(s) the tool is described.

The database presently contains over 150 unique tools and is continuously growing. Of all tools, next to the category and divisions mentioned before, the tool's in and outputs, strength and limitations, product/market and conditions of use are represented. Also ordering info can be found, where possible direct download addresses are given.

Most tools can be used in all European countries, although sometimes a translation would be necessary. The power of the database is that when searching for tools that are useful for a particular country, it also suggests tools from other countries that may be useful. In this way, a campaign organiser can find the results of the work in other countries that could be useful for his campaign. This makes the database a very useful key to information for all Soltherm partners and other parties involved in solar thermal energy in Europe.

The database can be found at [www.soltherm.org](http://www.soltherm.org) under 'Tools and guidelines'.

### 8.2 Market reports

A European Market analysis report as well as 10 Country and 3 regional Market reports can be downloaded from the central Soltherm web-site. These reports contain not only market data, but analyse the market and its underlying structures so that new campaigns and marketing actions can build on a good understanding of the market. Also, the most important factors that have led to the growth of these markets to their present size have been described.

### **8.3 Network and publicity**

Soltherm has about 50 Associate partners that will be invited to share and learn from each others experiences on what worked and what did not work in certain circumstances. Further, Soltherm Europe has an electronic newsletter and regularly makes publicity at conferences, in magazines and through other media. In this publicity, example campaigns are often presented to peer professionals and other interested organisations and authorities.

### **8.4 Quality structures overview**

On [www.soltherm.org](http://www.soltherm.org), a section is devoted to give an overview of the most important European, national and regional quality structures that are relevant for solar heating technology. Certificates and standards are listed for products and for installation work.

### **8.5 National co-ordinators**

A network of 10 National Co-ordinators has been established in the framework of Soltherm, that co-ordinates information flows around marketing and sales campaigns. Presently, the National Coordinators are: AEE Intec for Austria, 3E for Belgium, Ellehauge for Denmark, Ademe for France, DFS for Germany, CRES for Greece, AI for Italy, Novem for the Netherlands, TRAMA for Spain, BRE for the UK. The latest list plus contact information can be found on [www.soltherm.org](http://www.soltherm.org).

### **8.6 Advice**

On request, members of the Soltherm team can be invited to participate in workshops or otherwise give tailored advice on campaigns and other marketing activities. For contact data see the central website.

## 9 Conclusions

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In this report recommendations, tips and guidelines are given for campaigns and actions to enlarge the market for solar heating products in Europe. These have been based on the experience of parties that have made a significant contribution to the growth of the solar heating market in European countries in the past decade. Campaigns and market stimulation actions can be (and have been) initiated by very different parties. It is important to include all parties with an interest into the campaign and to take care that there is good communication between these parties.

A good market stimulation campaign has two sides: sufficient attention should be paid to both the demand side and the supply side. When one of these sides is neglected, the effects of the campaign on actual market enlargement may not be optimal.

### 9.1 Demand side

The campaign models of Chapter 7 show that for a successful solar water heater campaign great attention has to be paid to the demand side. In promotion and publicity, sufficient attention needs to be paid to the lifestyle aspect, to process oriented planning, and to bringing the customer from a usually low level of familiarity and knowledge to a preparedness to invest in solar heating. The latter requires intensive and well-designed marketing and coaching of the customers through several phases.

Some campaigns or market development programs are organised in order to efficiently accompany incentives to the market, like the French Plan Soleil and the Soltherm market development program of the Belgian Walloon region. Other campaigns, like the local/regional campaigns in the Netherlands, are organised in such a way that they take the work of obtaining subsidies etc. out of the customers' hands as much as possible.

'Solar-positive regulations' e.g. exemption from building permits, energy performance in building regulations, obligation for implementation have a generic, long-term effect (less susceptible to political influences than subsidies). A fine example is the 'Solar Ordinance' that is being applied by a number of Spanish authorities.

### 9.2 Supply side

The attention that has to be paid to 'the supply side' is another important aspect. Especially in less developed markets, action has to be taken to ensure that consumers can easily find and contact high-quality products and well-educated installers, that know not only to install but also to sell a solar heating installation. This requires thought on selection of products and/or installers and on the channeling of leads.

In a solar water heater campaign where intensive marketing is performed, central procurement / tendering can be an attractive option for both the hardware and the installation work. Suppliers and installers will be motivated to join such tenders because of the expected large sales in a short period of time and/or in a relatively small area. If a limited number of products are offered, the supplier and installer will be able to work more efficiently on those products. Points of attention in tenders are the co-operation between manufacturers and installers (for instance by including course by the selected manufacturers to the selected installers) and well-designed quality management.

### 9.3 Quality management

Solar heating installations are a product that requires a large up-front investment. If the consumer has any doubts on whether the product will have the promised lifetime and performance, or whether the product will require a lot of maintenance, he will be strongly discouraged to do that investment. Low quality installations can thus seriously damage the market for a long time. Therefore, it is important that the products and installation work are of such quality that they will establish (or contribute to) a good image of solar water heaters. The main structures to assess the quality of products are the CEN Standards, The Solar Keymark and National certificates, guidelines and test reports. No European-level certificate or standard for installation work of solar heating products exist, but in campaigns the quality can be controlled through tendering, specific courses and/or selective incentives.

### 9.4 Campaign examples / models

In these Guidelines, a number of the most important and/or successful campaigns in Europe of the past period of market development have been presented as examples for use in new campaigns. The campaigns have been structured into national-level, regional-level and local campaigns. Each campaign is shortly presented and analysed in a 'campaign sheet, detailing its effects, special aspects, success and failure factors (both internal and external), and recommendations for those who would like to replicate a campaign. In Chapter 6, more guidelines are given on how to select and adapt these examples for use in designing new campaigns.

In addition to these Guidelines, there are a number of other ways that the Soltherm Europe Initiative supports marketing campaigns for solar heating products. On the central web-site [www.soltherm.org](http://www.soltherm.org), relevant campaign tools and materials can be found, an overview of standards and certificates in Europe is given and market analysis reports can be downloaded. The Soltherm network allows campaigners to share and learn from each others experiences, and publicity is made including the presentation of example campaigns to peer professionals and other interested organisations and authorities. A network of 10 National Co-ordinators has been established to co-ordinate and support new campaigns and actions in their respective countries.

## References and further reading

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- [1] Soltherm Europe – European market report, February 2003, downloadable from [www.soltherm.org](http://www.soltherm.org)
- [2] Soltherm National Market Reports are available for ten countries: Austria, Belgium, Denmark, France, Germany, Greece, Italy, the Netherlands, Spain and the UK, and for three regions: Catalonia (Spain), Rhône-Alpes (France) and Upper Austria (Austria). They are downloadable from <http://www.soltherm.org>.
- [3] EN 12975: Thermal solar systems and components – Solar Collectors – Part 1: General Requirements and Part 2: Test methods
- [4] EN 12976: Thermal solar systems and components – Factory Made Systems – Part 1: General Requirements and Part 2: Test methods
- [5] ENV 12977: Thermal solar systems and components – Custom Built Systems – Part 1: General Requirements, Part 2: Test methods and Part 3: Performance characterisation of stores for solar heating systems
- [6] SOLHAS – Market Strategy, B. van der Ree, J.P. van Aken, M.J. de Bruijn, M. Schulz, J. Backes, S. Gajewski-Schneck, EU Altener project XVII/4.1030/Z/99-554, Ecofys nr E10056, Utrecht, October 2001
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- [15] RES-AREA, Extensive coverage of Energy Demand Using RES in Urban Residential Areas, Final Report, Ambiente Italia, July 2001, downloadable from [www.ambienteitalia.it/fsdownload.htm](http://www.ambienteitalia.it/fsdownload.htm)
- [16] Untapped market opportunities for solar water heaters in Europe – EU Thermie Project STR/209/98-FR, Synopsis, France, downloadable from [www.itpower.co.uk/swhmarket/](http://www.itpower.co.uk/swhmarket/)
- [17] Energiezuinig bouwen met zonneboilers – Leidraad zonneboilers voor projectmatige nieuwbouw (Energy efficient buildings with solar water heaters – guidelines for solar water heaters in new construction projects), Ecofys by order of Novem, Utrecht, Oktober 2000
- [18] Source: Ronald Voskens, Ecofys, 2002



## Annex A: Checklist for campaign design

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***This checklist can be used to check the quality of the design of a marketing campaign for promotion of solar heating products. It has been based on combined experience of campaign organisers in Europe as presented in the ‘Soltherm Europe campaign guidelines’.***

*Tip: Please explain the ‘partly’ or ‘no’ answers in the designated areas. After filling in, it is advisable to consider the questions that have been answered with ‘partly’ or ‘no’, and give thought to how those aspects could be improved.*

Date:	Campaign name:
Author:	Financier:

*Note: N/A = Not applicable*

### General

- It is clear who initiates and leads the campaign  Yes  Partly  No
- All useful parties are involved (authorities, energy agencies, industry / installers organisations, sponsors, ...)
- The interests of parties have been mapped and benefits have been made clear  Yes  Partly  No
- The division of roles is clearly defined  Yes  Partly  No
- There is a sufficient budget for organisation and management  Yes  Partly  No  N/A
- There is sufficient budget for after-care, follow-up and handling of customer requests  Yes  Partly  No  N/A
- There is a small decisive project team  Yes  Partly  No  N/A
- The project team workers have good management / interpersonal skills  Yes  Partly  No  N/A
- There is a clear project planning  Yes  Partly  No
- The campaign models (chapter 7 of the Soltherm Campaign Guidelines) have been considered care-  Yes  Partly  No  N/A



fully.

The campaign activities are documented and evaluated.

Yes  Partly  No  N/A

*Explanation on 'Partly' or 'No' answers:*

**Demand Side**

The target group has been well defined

Yes  Partly  No

The target group has the right size for the campaign: small enough so that intensive, repeated communication can take place

Yes  Partly  No  N/A

The solar products are offered / promoted in combination with high-efficiency conventional heaters and/or other energy saving packages

Yes  Partly  No  N/A

There is a clear overview of relevant incentives / subsidies

Yes  Partly  No  N/A

It is clear what the barriers for implementation are (regulations, subsidies, availability of good products or installers)

Yes  Partly  No  N/A

Subsidies are handled centrally by the campaign organisation, taking the paperwork out of the customers' hands or even deducting the subsidy from the sales price and taking care of it centrally

Yes  Partly  No  N/A

Local / regional authorities are involved in order to check regulations for 'solar-friendliness', and to handle requests for permits fast and adequately

Yes  Partly  No  N/A

Sponsors give a subsidy on the campaign and/or on the products

Yes  Partly  No  N/A

*Explanation on 'Partly' or 'No' answers:*

### Supply Side

- The products sold / promoted are qualified (Solar Keymark, CEN standards, national certificates / guidelines) or carefully selected for proven reliability  Yes  Partly  No  N/A
- Products sold / promoted have a good architectural appearance  Yes  Partly  No  N/A
- The installers whose services are sold / promoted are qualified (Qualisol, national certificates / guidelines)  Yes  Partly  No  N/A
- The price / performance of the products is attractive, f.i. through purchase tendering of the products and installation work  Yes  Partly  No  N/A
- The solar products are offered / promoted in combination with high-efficiency conventional heaters and/or other energy saving packages  Yes  Partly  No  N/A
- When hardware is sold, the suppliers are well checked for continuity, delivery time, delivery capacity, terms of delivery, quality checks  Yes  Partly  No  N/A
- A guarantee on the products is given  Yes  Partly  No  N/A
- A guarantee on the installation work is given  Yes  Partly  No  N/A
- Installers are involved and educated in such a way that they are motivated and able to install but also sell the products  Yes  Partly  No  N/A
- The campaign ensures that large solar heating systems or non-standard installations are designed by a professional solar planner  Yes  Partly  No  N/A

*Explanation on 'Partly' or 'No' answers:*

### Promotion and communication

- There is a clear, well organised and appropriate communication plan  Yes  Partly  No  N/A
- The marketing approach takes the view of the client  Yes  Partly  No  N/A

- A positive social climate is created  Yes  Partly  No  N/A
- Apart from rational arguments, a certain life style or feeling is connected to the products  Yes  Partly  No  N/A
- The campaign takes the prospects along the path of decision phases:  
 Non-sales (raising awareness) → Pre-sales (interest, specific information) → Sales (decision, choice of supplier / installer) → After-sales (service, good reaction to complaints)  Yes  Partly  No  N/A
- Several different media are used in relation to the above phases (mailing, internet site, folders, advertisements, ... )  Yes  Partly  No  N/A
- There is a clear central message  Yes  Partly  No
- The Corporate Design and logo reflects the central message  Yes  Partly  No  N/A
- There is a memorable and appealing campaign name  Yes  Partly  No  N/A
- Multipliers (mayor, politician, celebrity) and testimonials are used to influence the opinion  Yes  Partly  No  N/A
- There is a clear, easy way to reach the information centre  Yes  Partly  No  N/A
- It is ensured and monitored that all requests of consumers (to installers as well as to the information centre) are answered fast and adequately  Yes  Partly  No  N/A
- In a campaign with many partners, centrally designed but customisable marketing tools are used  Yes  Partly  No  N/A
- The timing of communication is well designed (season, connection to other developments)  Yes  Partly  No  N/A
- The results of the campaign are monitored frequently  Yes  Partly  No  N/A
- Positive results of the campaign (f.i. 100<sup>th</sup> system installed) are used for further dissemination  Yes  Partly  No  N/A

*Explanation on 'Partly' or 'No' answers:*