



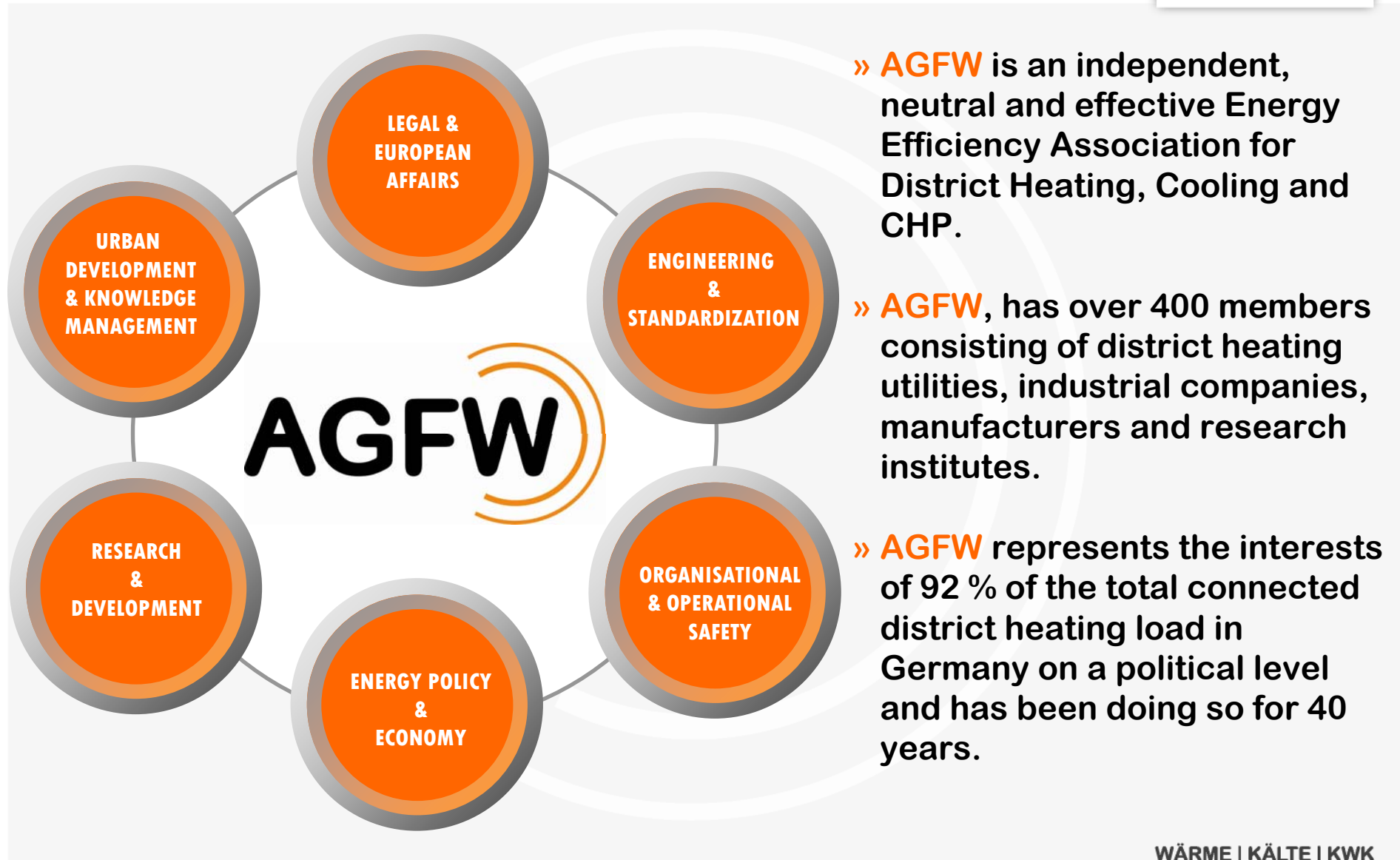
The District Heating Barometer, why and how
European DHC statistics – Towards better documentation and analysis,
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» AGFW: A brief introduction



» **AGFW** is an independent, neutral and effective Energy Efficiency Association for District Heating, Cooling and CHP.

» **AGFW**, has over 400 members consisting of district heating utilities, industrial companies, manufacturers and research institutes.

» **AGFW** represents the interests of 92 % of the total connected district heating load in Germany on a political level and has been doing so for 40 years.

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» AGFW: A brief introduction

AGFW promotes the development and extension of energy-efficient district heating, cooling and combined heat and power in Germany and internationally.

- » Key strength: Skilled work on a **technical, economical and juridical** level for the whole sector
- » Professional and competent **contact for policy makers**
- » Developing **engineering standards and rules**
- » Preserving **specialist knowledge** as well as **qualifying** the sector's employees
- » Basis for guaranteed **quality standards**
- » National and international tasks in the field of **research and development**
- » The sector's **communication centre**

» What is the District Heating Barometer?

- » The District Heating Barometer is a tool to measure the development of District Heating on national markets
- » The District Heating Barometer is a quick reaction tool, providing early access to the sentiment of the sector
- » The District Heating Barometer is meant to complement statistics on District Heating in Europe and on national markets
- » The District Heating Barometer provides data and assessments for policy makers

» Why develop a District Heating Barometer?

- » District Heating statistics are often not available in a timely and precise fashion
- » An overview of the development of the sector is important for policy makers when planning legislative measures
- » Such an overview is also beneficial for the sector itself, providing a quick and different insight
- » Tool provides flexibility and more possibilities for communication

» How to develop a District Heating Barometer?

- » Create a working group of national experts
- » Identify and define key parameters
- » Coordinate with other sectors and stakeholders
- » Develop a tool to collect and disseminate the information

» Challenges faced during development

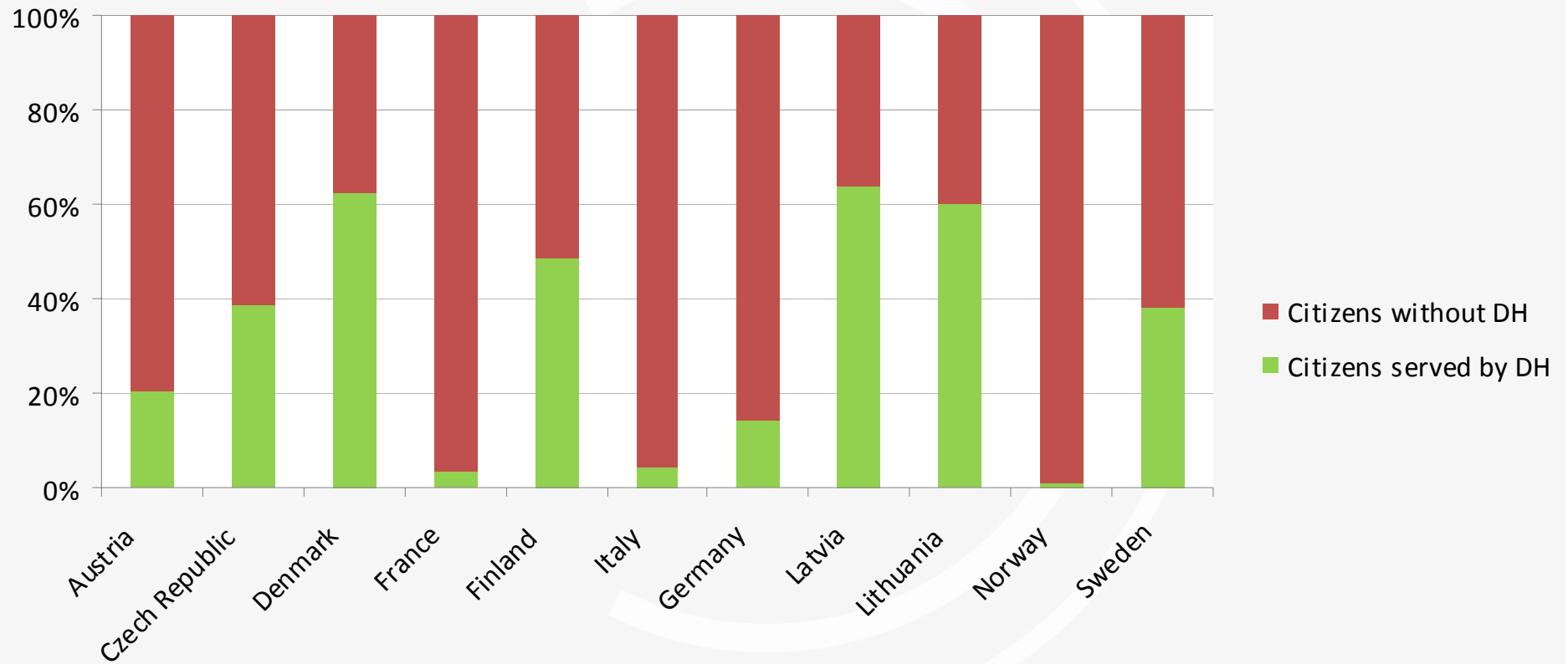
- » **Creating a working group of experts from different countries was not difficult, however incorporating those countries which do not already have a developed infrastructure proved difficult**

- » **Identifying and defining key parameters was very difficult**
 - » **Data is gathered differently in different countries for historical reasons or due to different frameworks**
 - » **Most participants as associations rely on voluntary contributions of their member companies**
 - » **Data processing also differs from country to country**
 - » **Striking a balance between hard facts and the sentiments of the sector**
 - » **Time restrictions**



» The key parameters identified for the first round

Citizens served by District Heating

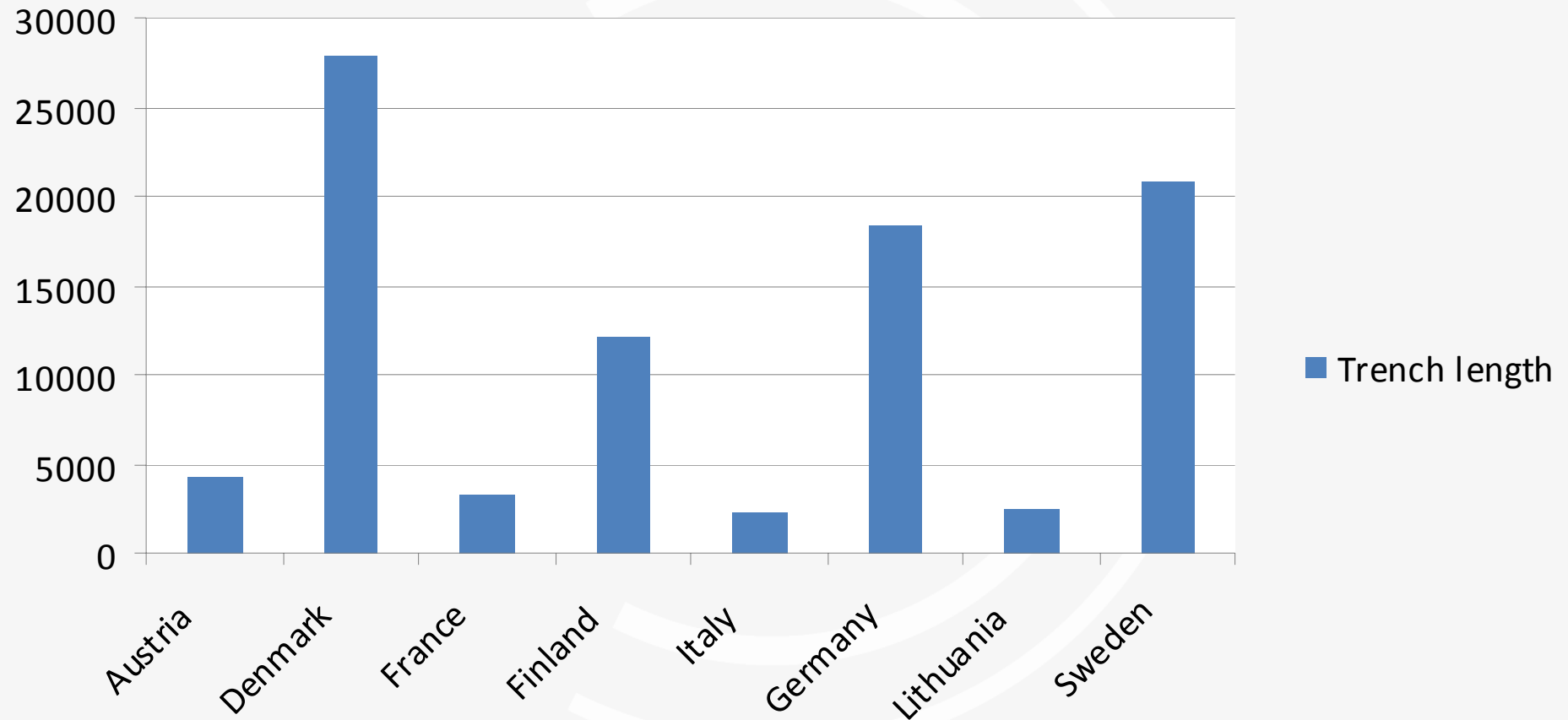


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» The key parameters identified for the first round

Trench length (km) in 2009

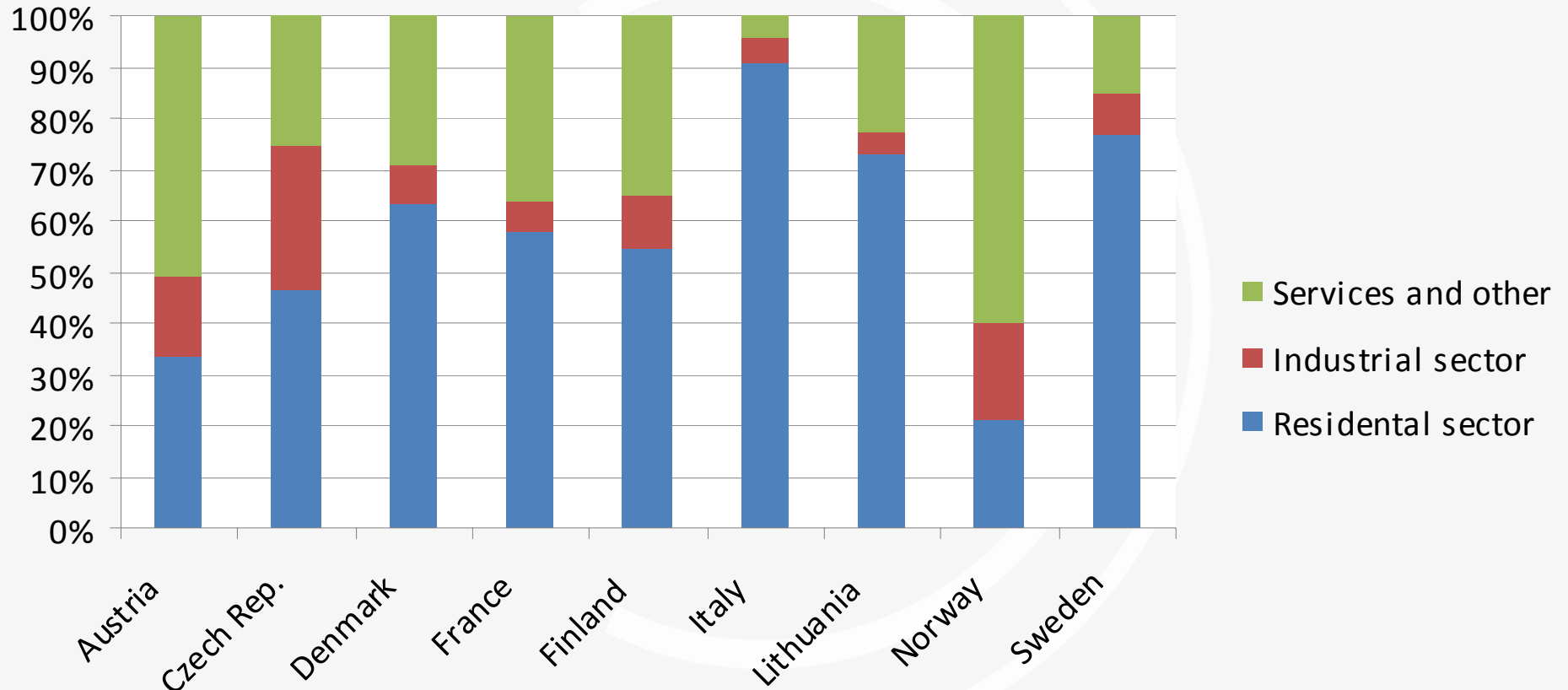


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» The key parameters identified for the first round

District Heating sales to customers (TJ) in 2009

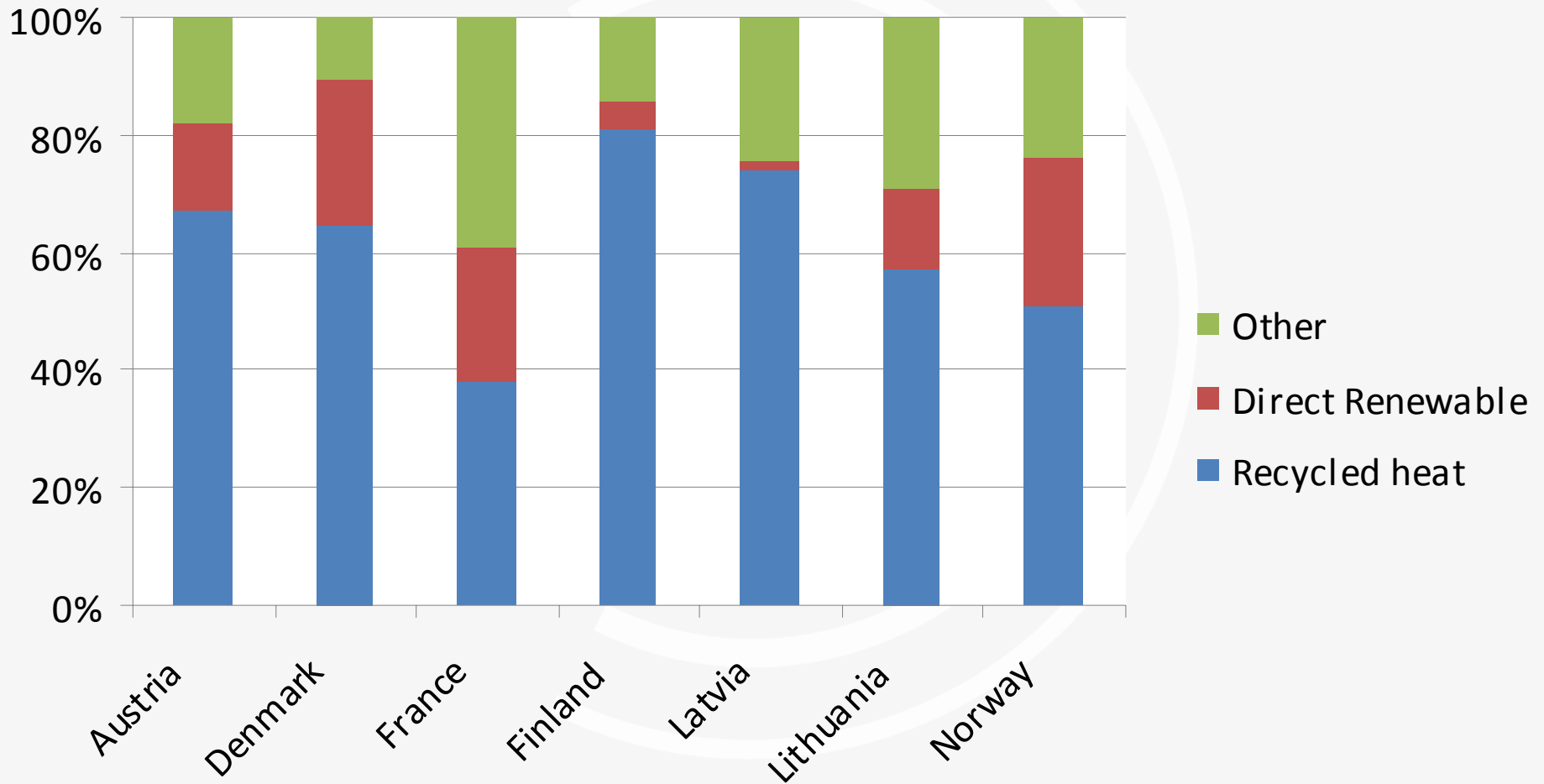


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» The key parameters identified for the first round

Energy supply composition in 2009

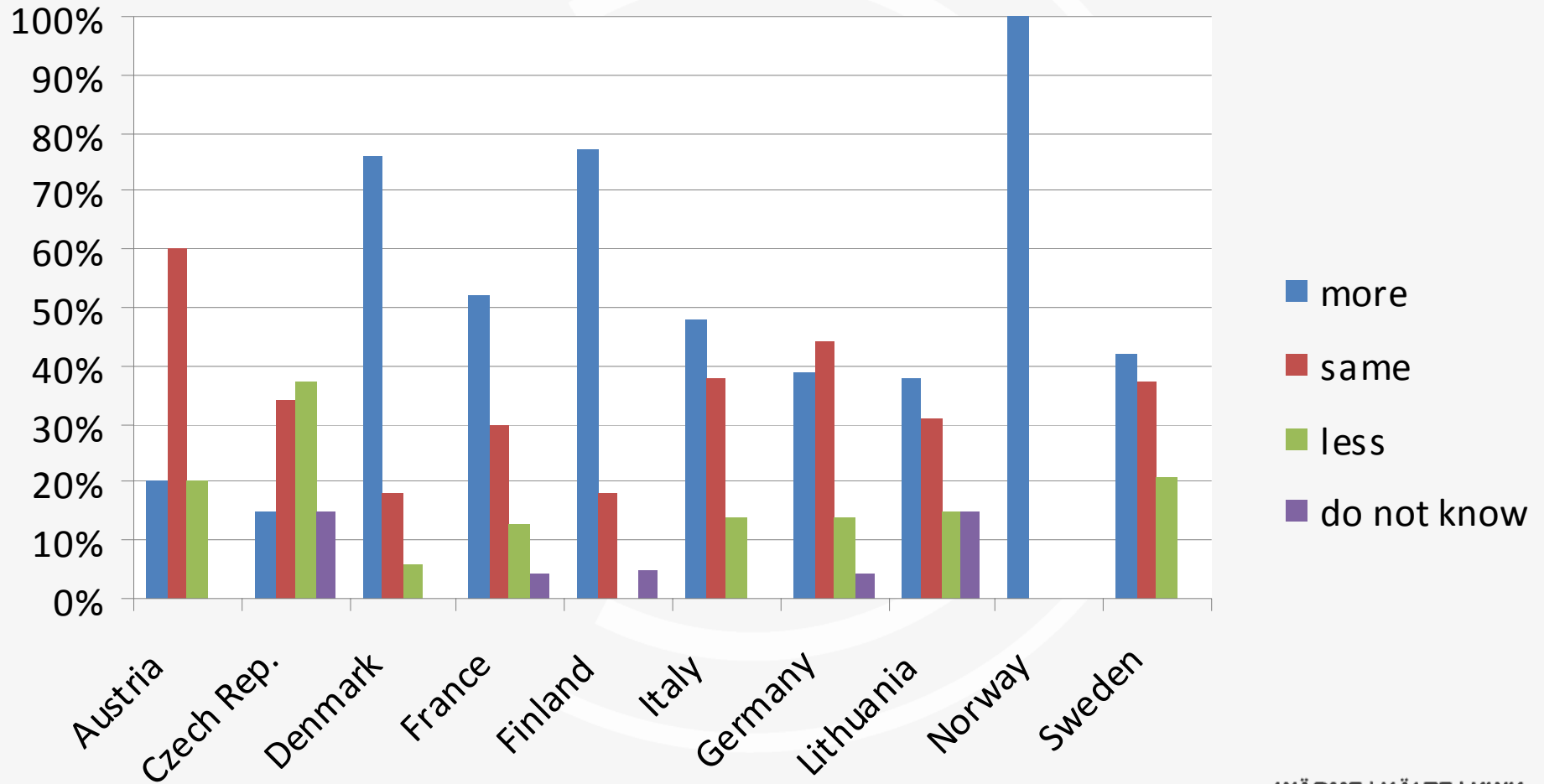


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» The key parameters identified for the first round

Business growth in the next 5 years

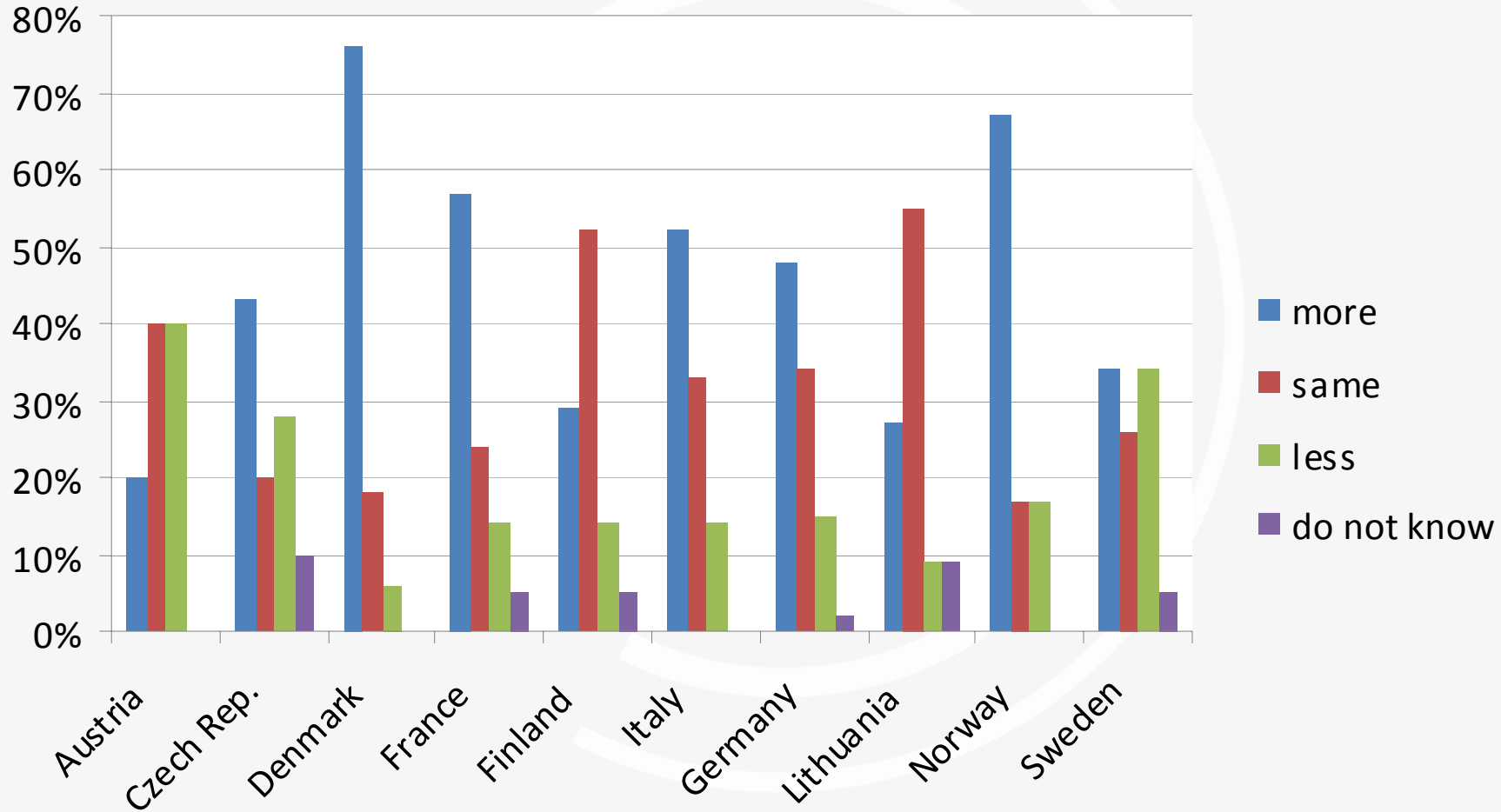


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» The key parameters identified for the first round

Investments in the next 5 years

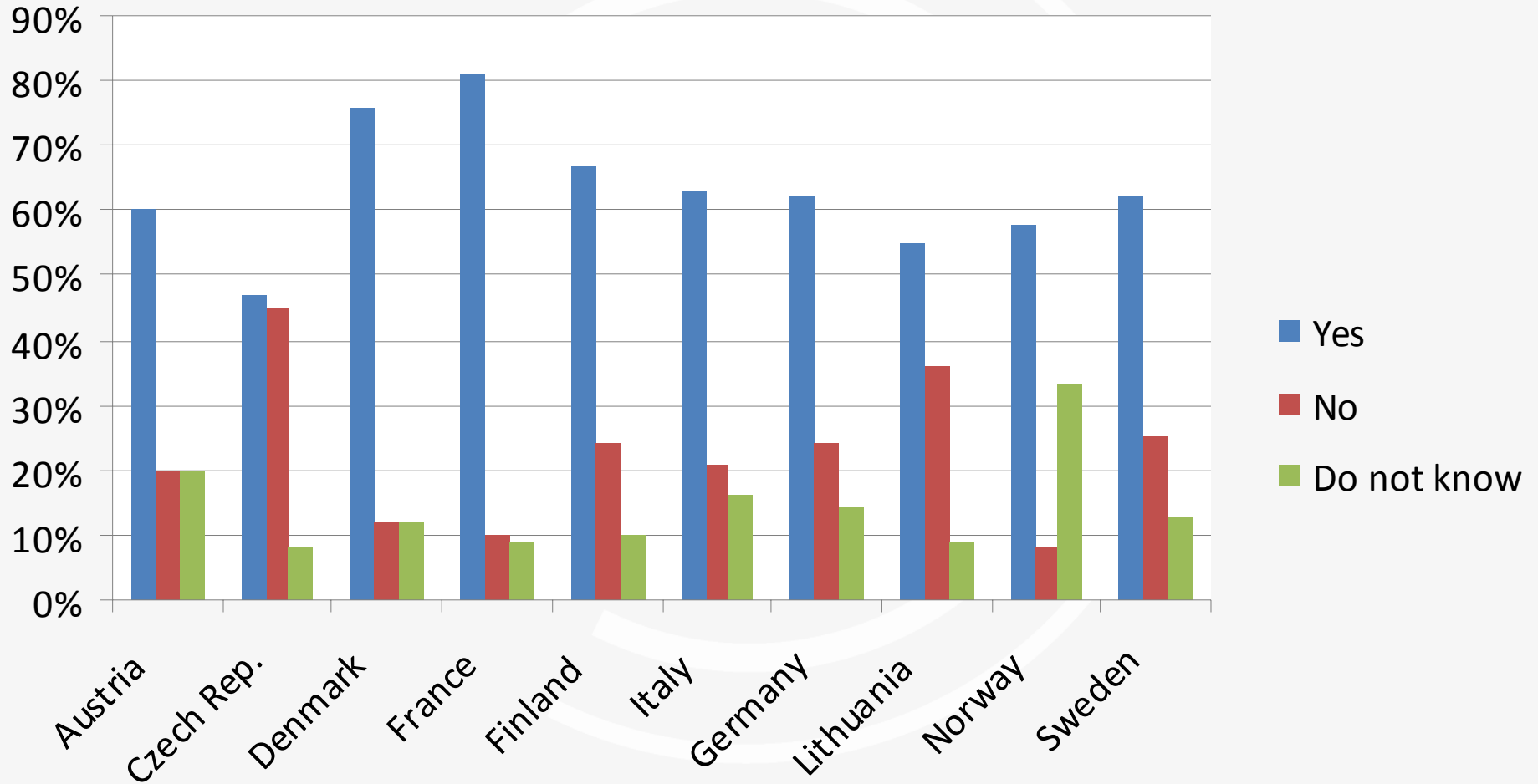


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» The key parameters identified for the first round

RES investments in the next 5 years?

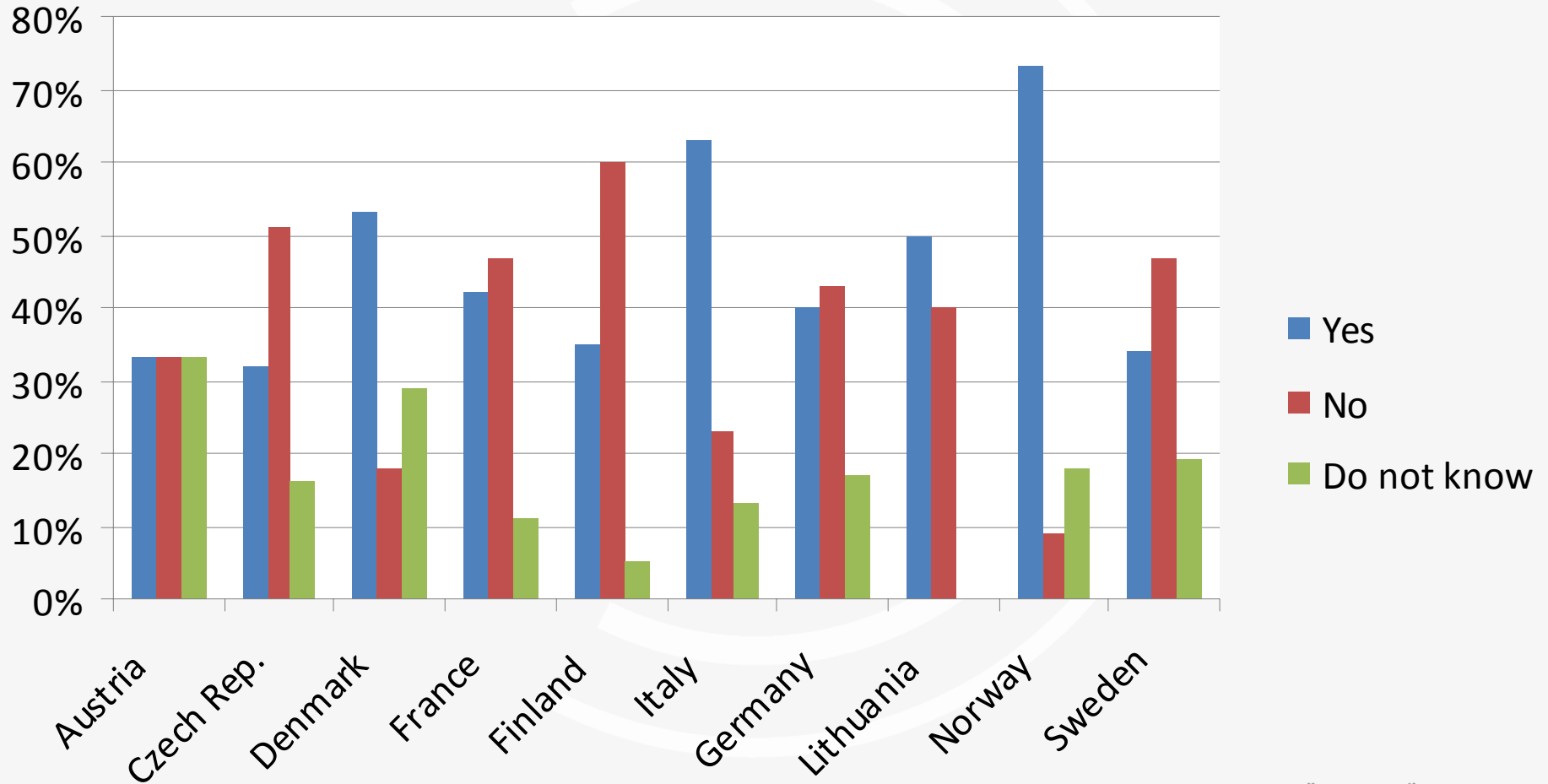


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» The key parameters identified for the first round

District Cooling as a growing business?

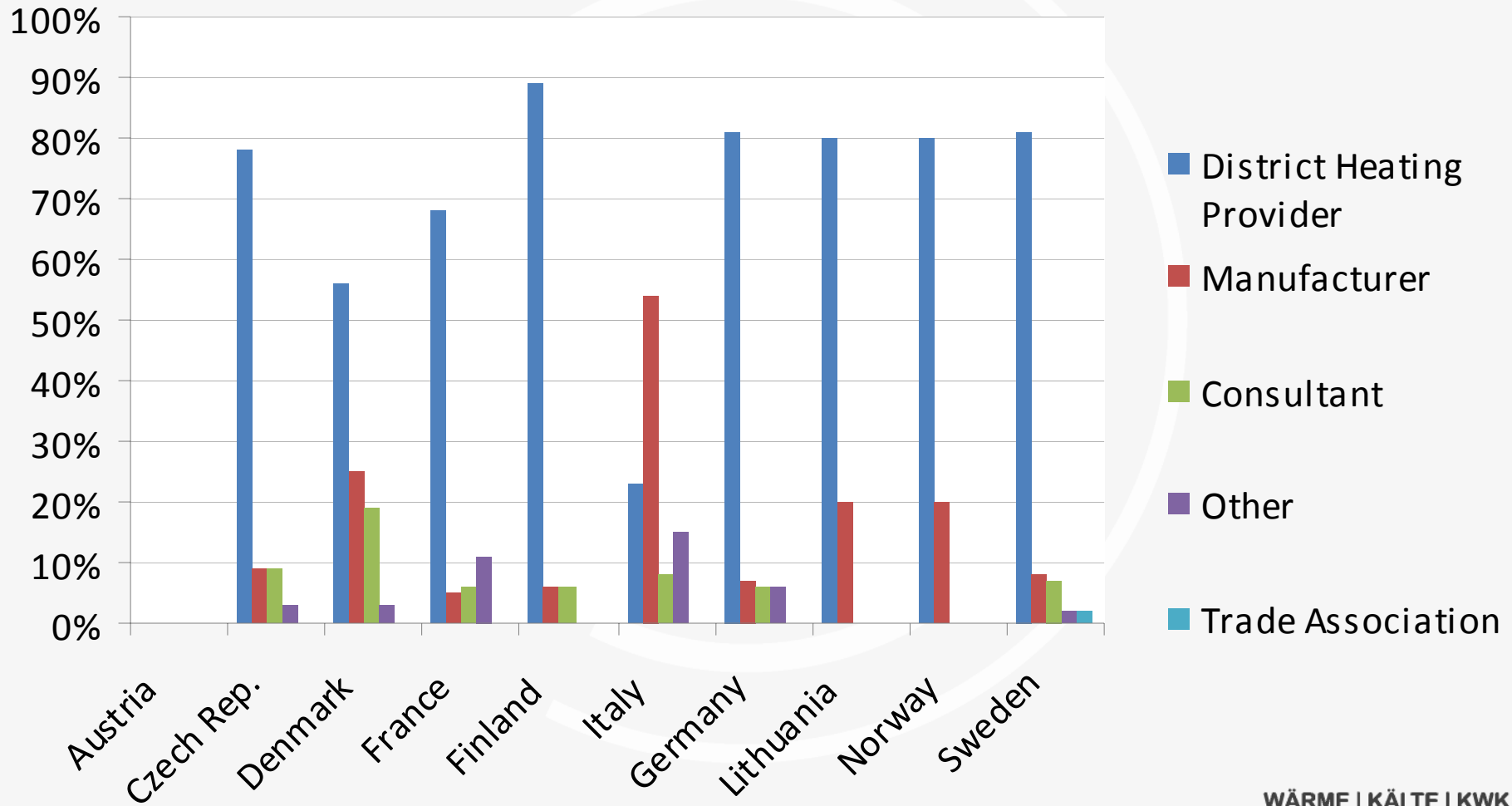


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» The key parameters identified for the first round

District Cooling as a growing business?



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» **Lessons learned**

- » **Formulating questions needs to take into account translations into different languages, which might distort the original message**

- » **Tailoring questions towards stakeholders which are not utilities (science, industry, administration)**

- » **Possibility of adding remarks for further analysis**

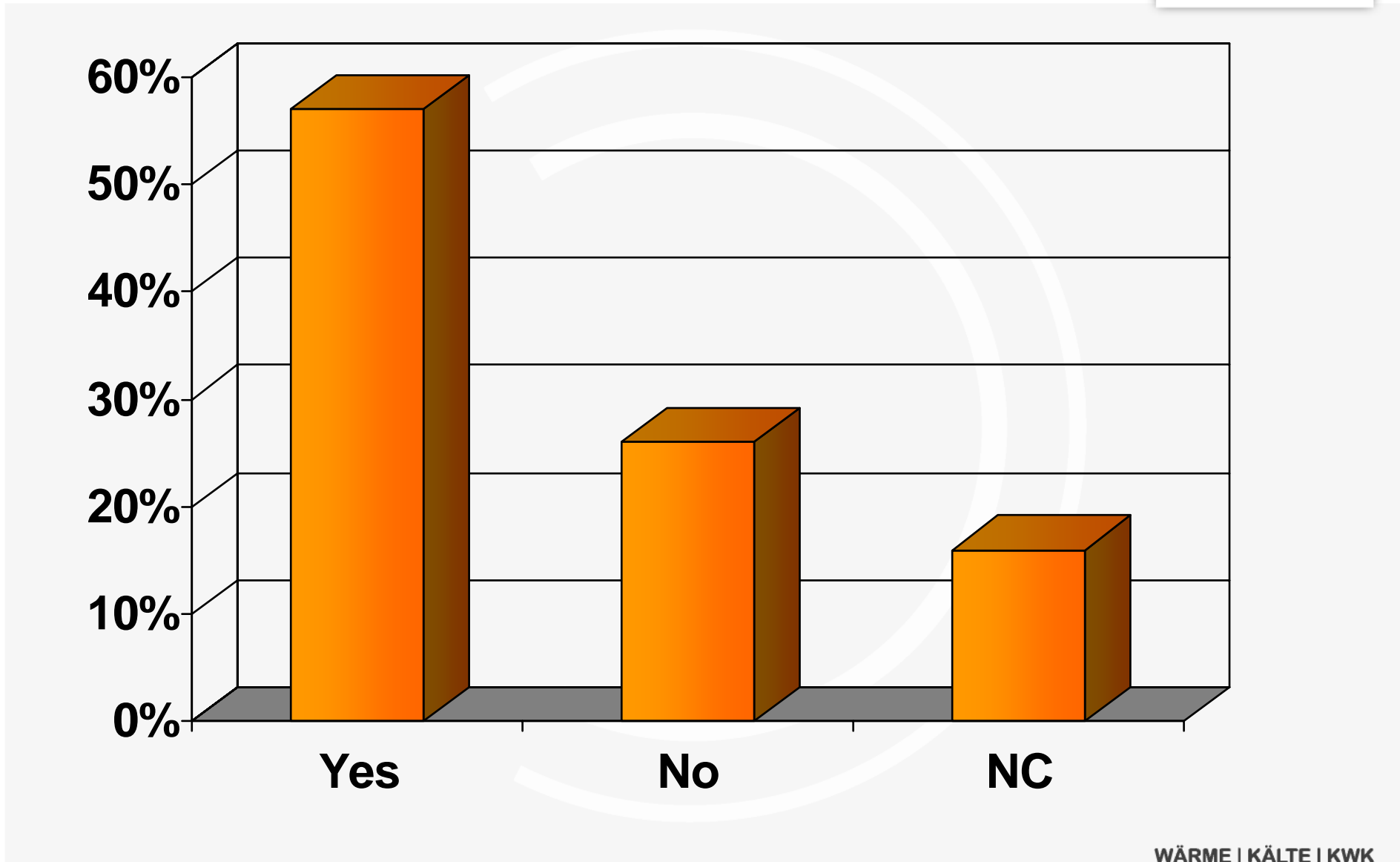


» **Data collection (German example)**

- » **Around 1,500 recipients**
- » **Around 200 completed surveys within a full day**
- » **Over 10 % return rate**
- » **Over 80 % completion rate**



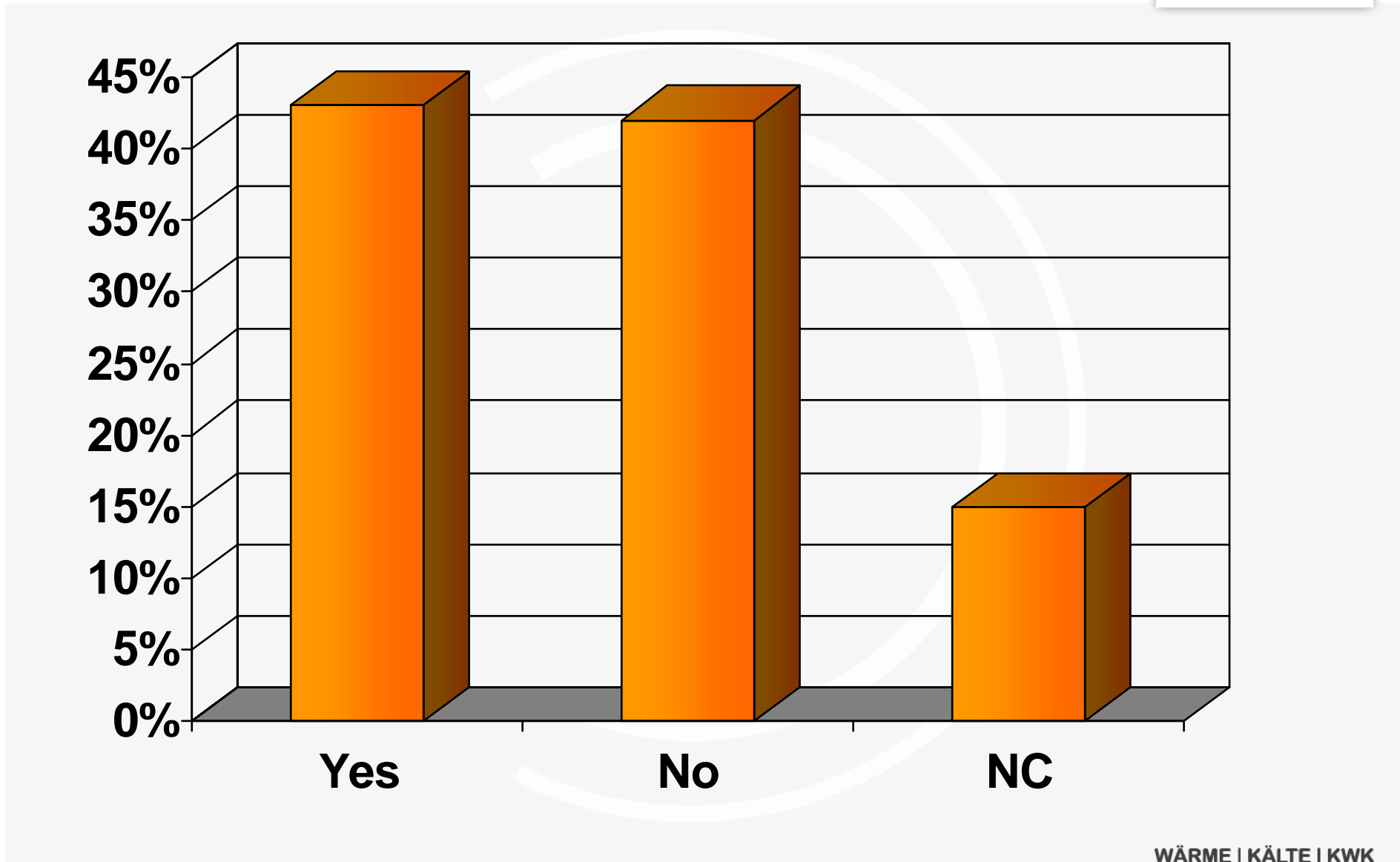
» Investments in RES in the next 5 years?



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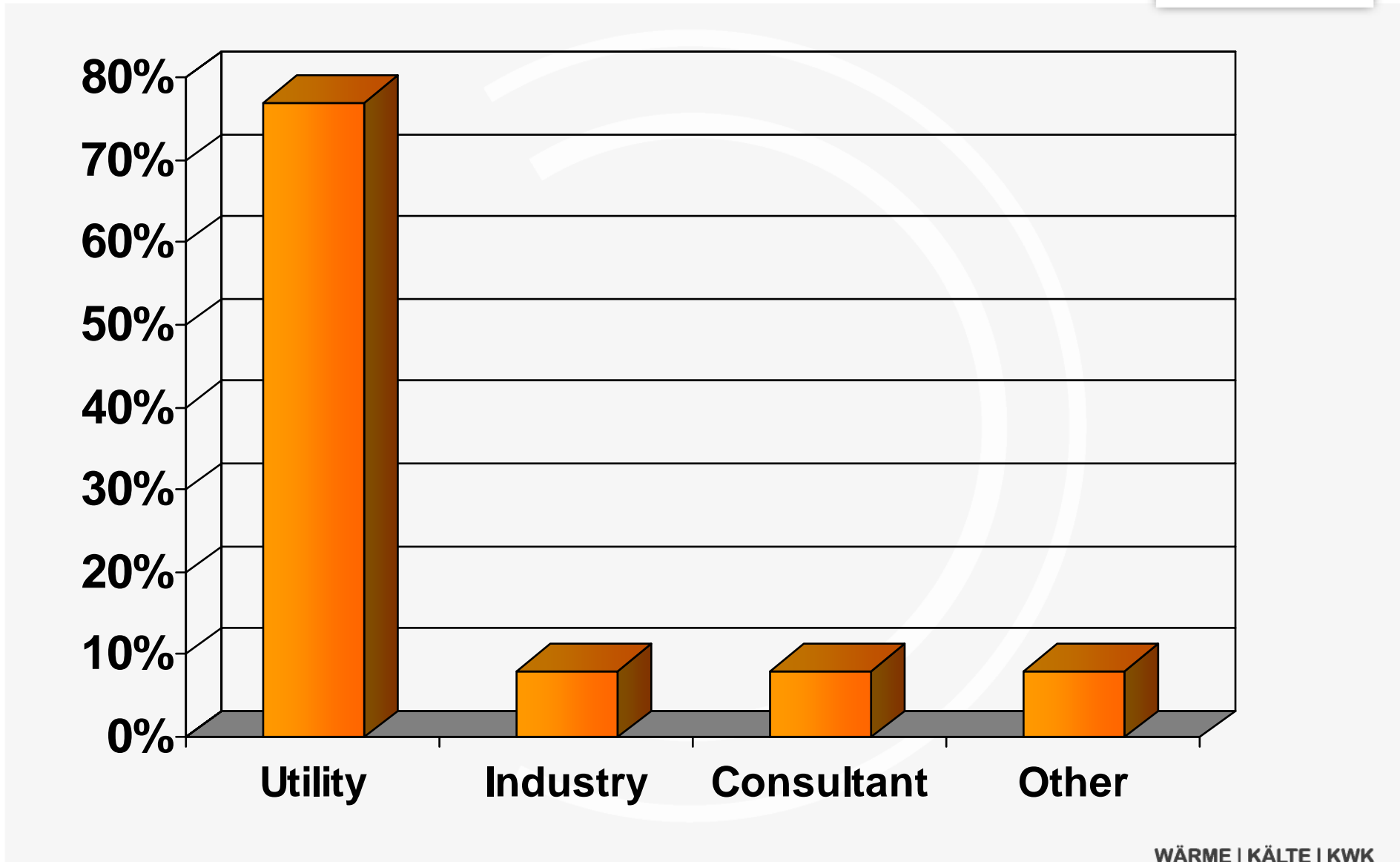
» DC a growing business?



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» Role in the DHC business?



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» Future challenges

- » Increase compatibility within the sector
- » Increase comparability with other sectors
- » Develop the tool further
- » Follow-up on current development
- » Increase the coverage of the tool from the current 11 countries

Thank you for your attention!

fernwärme 
rein ins haus.

District Heating ...

clean and smart heat for my home

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