Policies (in Europe) for driving heating systems decarbonisation


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Governance and market structure matters

- Central planning and state led delivery more accepted in certain regions.
- Federal systems and municipal structures imply more local rule setting.
- More economically ‘liberal’ regions may rely more on pricing and financial measures.
Geography increasingly important for communal solutions

https://www.iea.org/reports/net-zero-by-2050
Fig. 1: Global historic heat pump sales and IEA net zero 2050 pathway.

From: [Heating up the global heat pump market](#)

- Blue line: Heat pumps installed to 2020
- Orange line: Trend based on 2010–2020
- Grey line: IEA net zero pathway

Global stock of heat pumps through to 2020 (blue line) and growth to 2030 under a continuation of past trends (orange line), versus the number of units installed under the IEA’s net-zero pathway (grey line).
Massive heat pump deployment requires coordinated policy packages

Heat pump policy toolkit, upcoming, RAP
Conclusions

• Heat decarbonisation policy requires multiple tools including governance reform, local planning, economic reform and regulation.
• We are still quite early in learning what works, particularly in the move away from gas.
• This all needs to be considered alongside building thermal (fabric) energy efficiency.