



The key role of heat pumps in the Energy Transition – The European perspective

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About EHPA

230 members representing the entire value chain

- Heat pump and component manufacturers,
- National associations,
- Test labs,
- Utilities and consultancies,
- Research institutes and universities.

32 countries

International cooperation with

Comprehensive Economic Cooperation Agreement (CECA)
International Energy Agency - Heat Pump Centre (IEA HPC)
International Renewable Energy Agency (IRENA)
Heat Pump and Thermal Storage Centre of Japan (HPTCJ)

Our vision:

In a fully decarbonised Europe, heat pump technologies are the number one heating and cooling solution. They are a central part of a renewable, sustainable and smart energy system.

More: ehpa.org

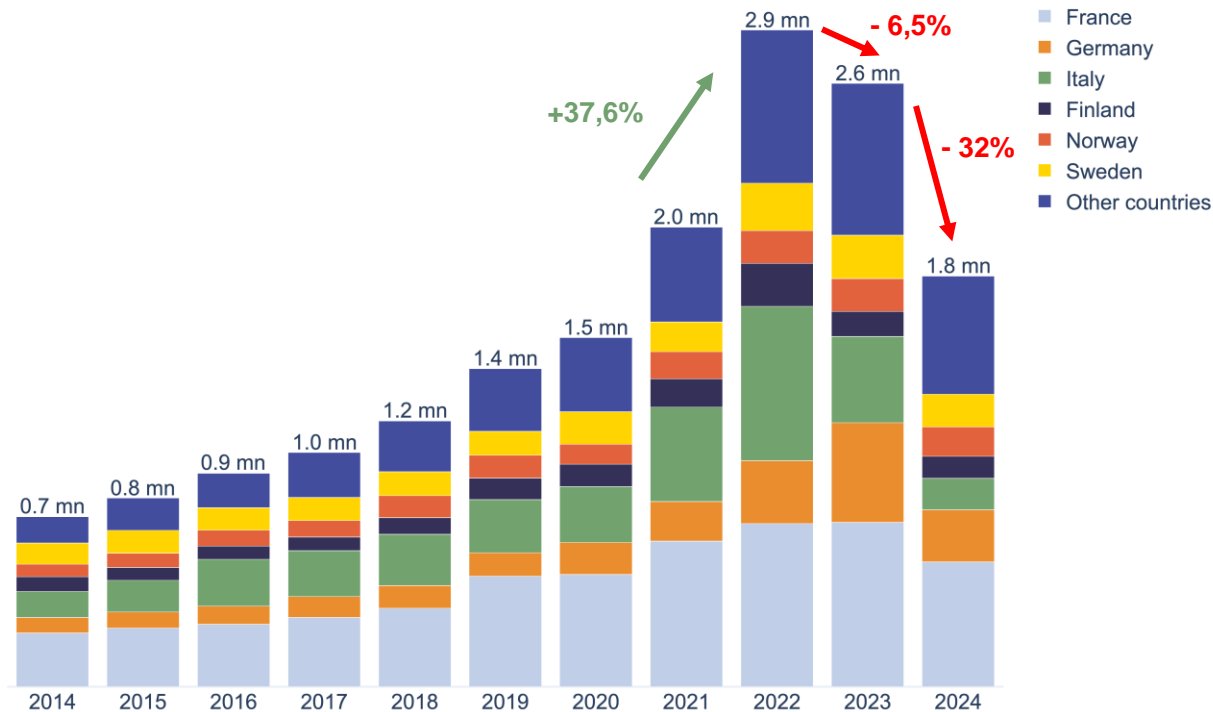


**Founded in 2000,
this year is 25th anniversary**



Total sales from 2014 to 2024 in 14 European Countries

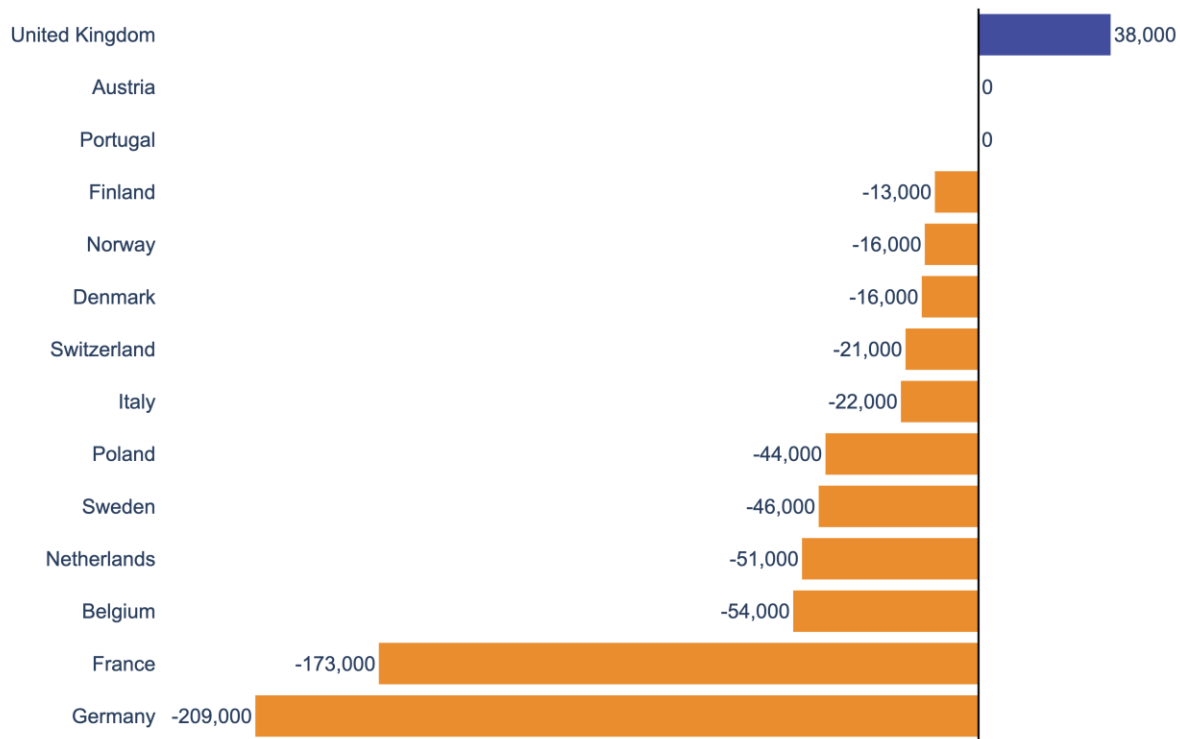
- Sales dropped 32% in 2024 vs 2023
- Reasons: Energy price & subsidy changes
- All but 1 country



Source: European Heat Pump Association

Heat Pumps Sales Comparison (2024 vs 2023)

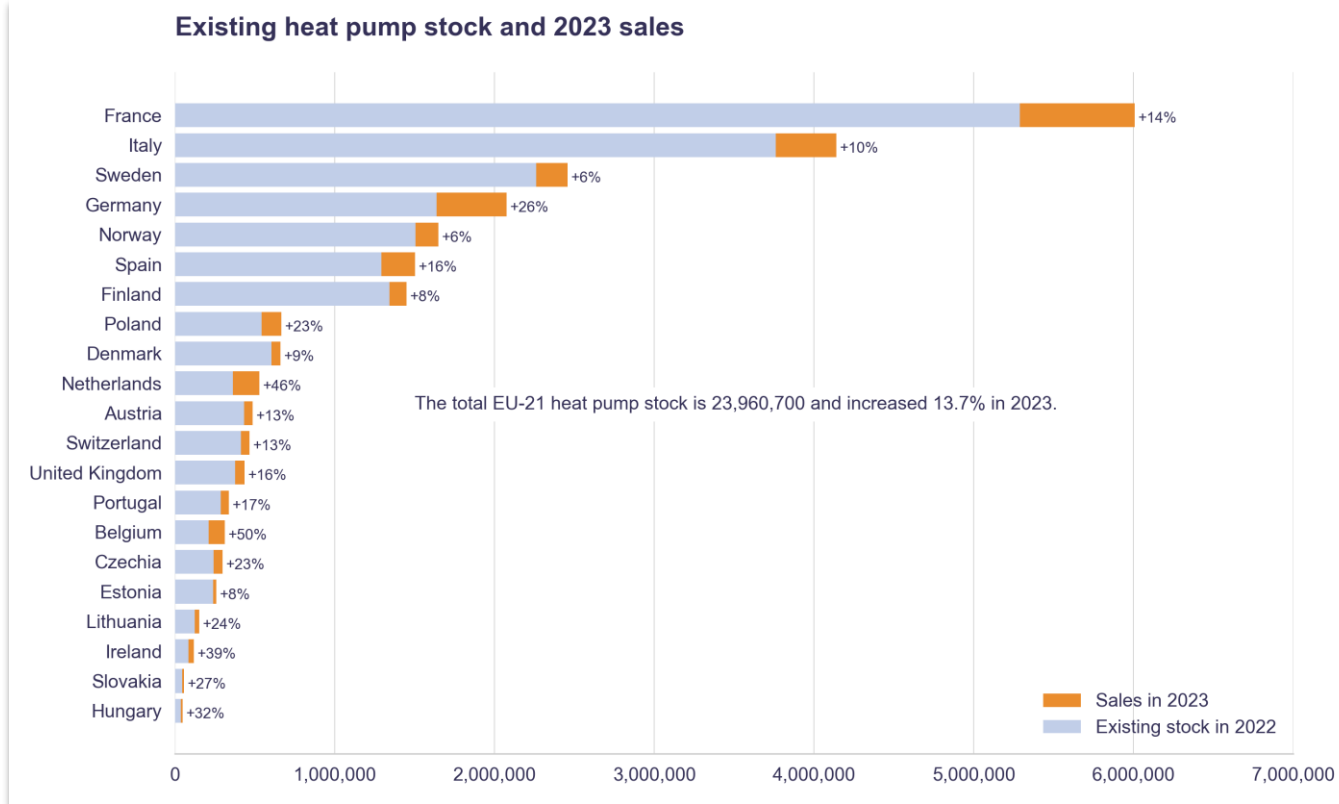
Change in heat pump sales (2024 vs 2023)



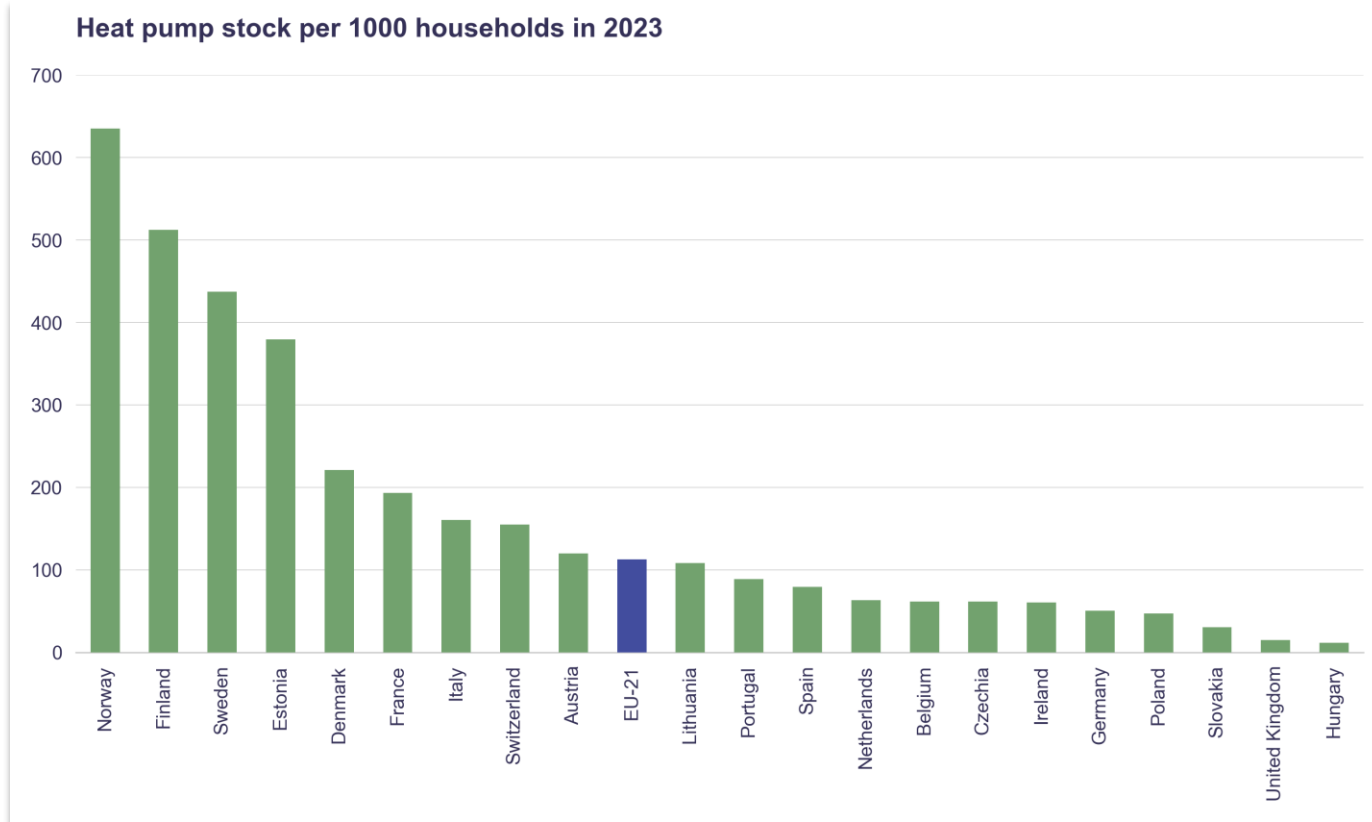
Source: European Heat Pump Association



Larger countries generally represent most sales...

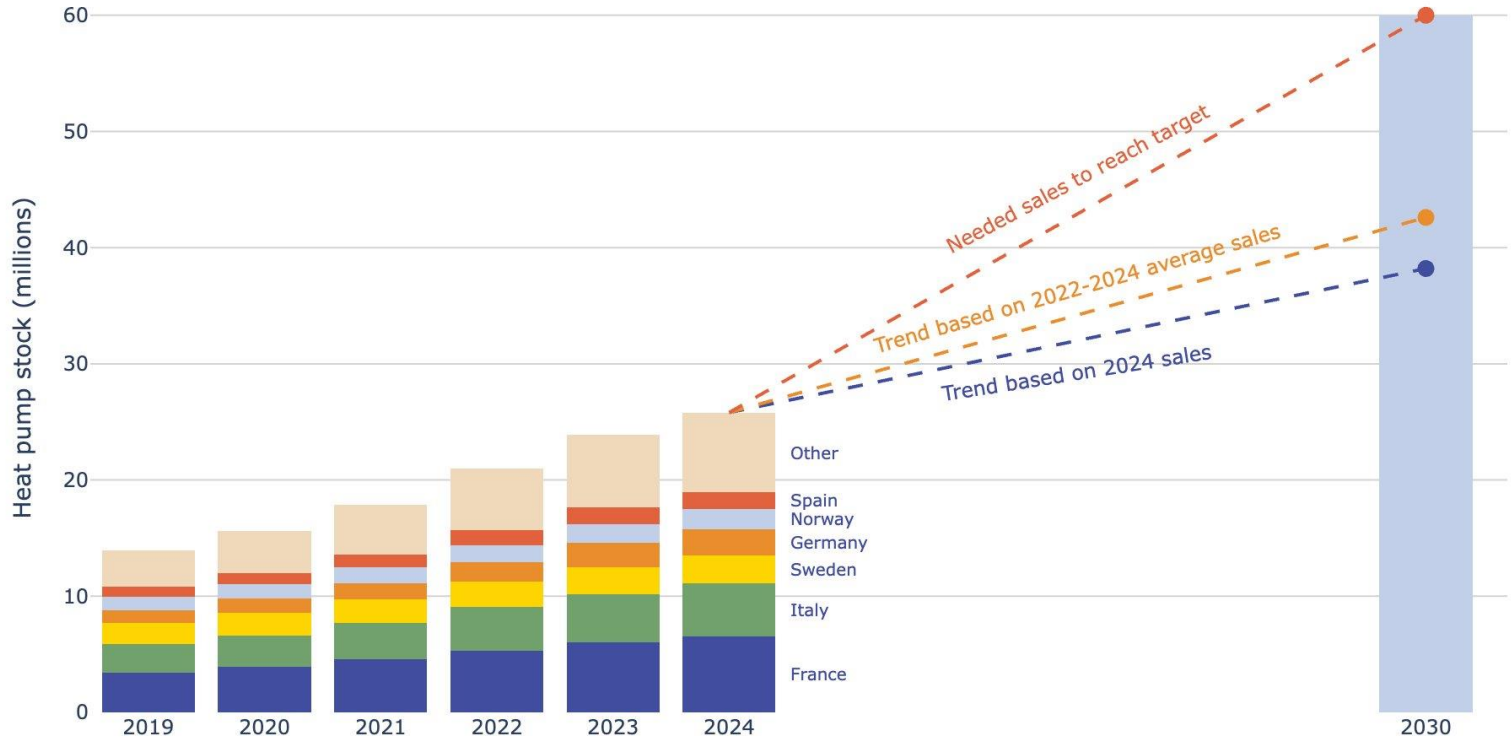


... But colder climates are the most mature markets



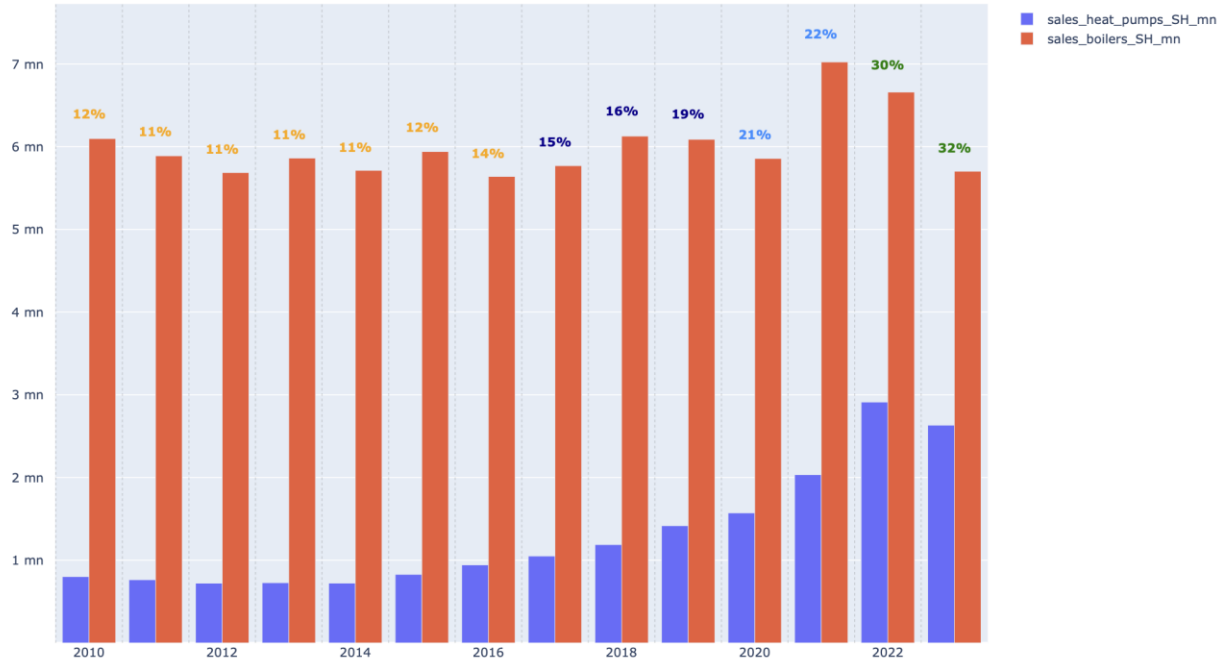
Missed opportunity to build momentum for a complete shift?

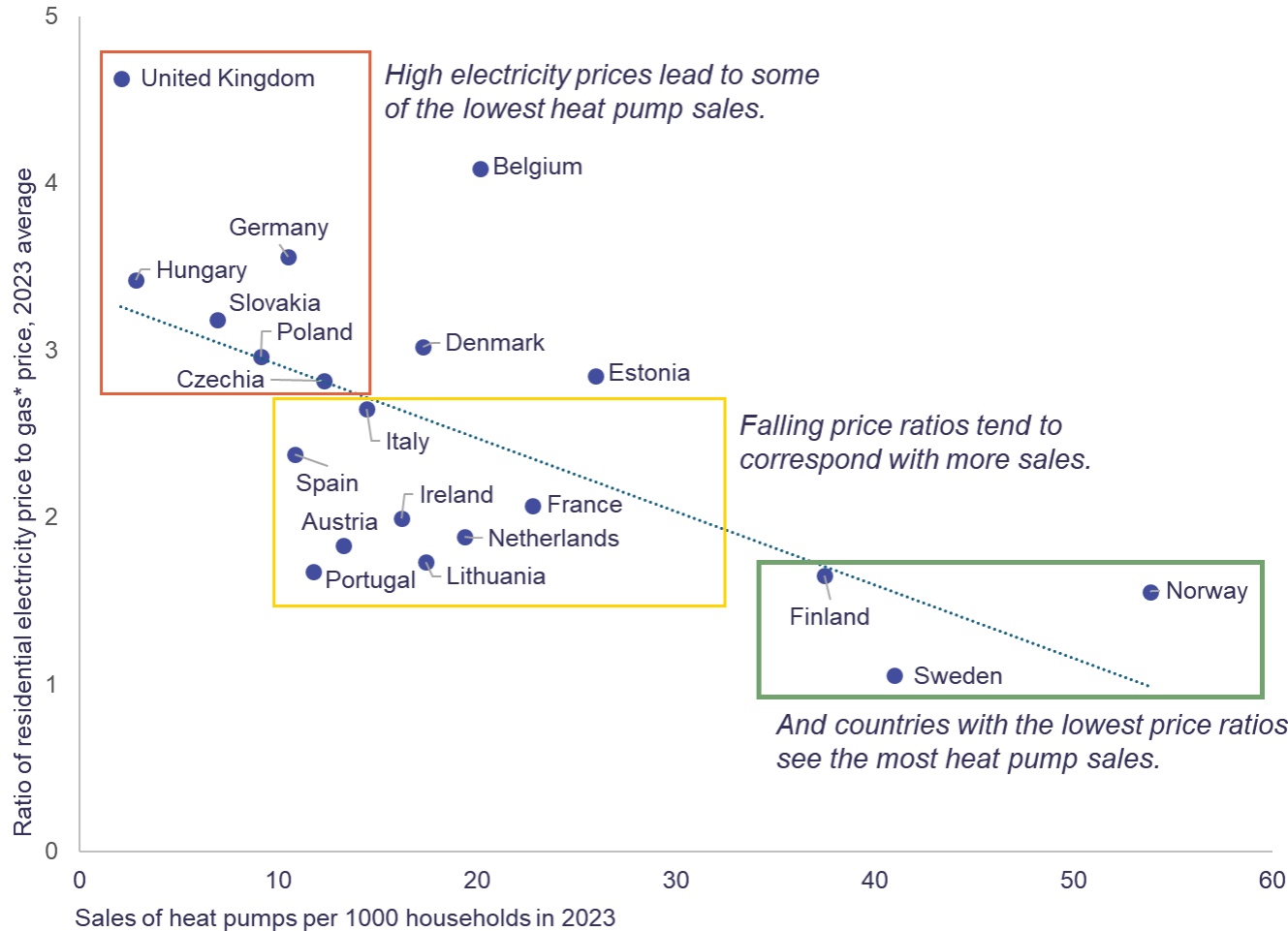
Current Growth of Heat Pump Stock Will Miss European Targets



Despite market morosity, heat pumps see continuous increase in market shares vs. gas boilers

Space heating sales by year: Heat pumps vs Boilers





How to create demand?



Long term policy clarity:

- Clear communication from policy makers
- Clear targets & long term planning



Affordability:

- Opex: electricity to gas price ratio & ETS2 & ETD
- Capex: VAT to 0% & dedicated funding for low income households



Information & skills:

- Correct info on opportunities and cost savings
- Train installers

Is a country “heat pump ready”? A checklist



- Large share of single-family buildings with **hydronic heat distribution**,
- Dominance of **low energy buildings** (to be heated with 55°C),
- Skilled labour, training installers,
- Sufficient capacity in the distribution grid,
- Low electricity / fossil price ratio**,
- No fossil fuel subsidies,
- Commitment to phase out gas / apply CO2 price to gas price,
- Flexible electricity tariffs,
- Commitment to heat pumps for heating and cooling,
- Ambitious energy and climate targets (clear communication, long term planning),
- Support for end-users: correct info on opportunities and cost savings.

IN 2022

Over 3 million heat pumps were installed across Europe, employing around **170,000 full-time equivalent workers.**



BY 2030

Doubling the deployment of heat pumps will require more skilled workers including engineers and installers.

The Heat Pump Accelerator Platform

The Platform is a dynamic EU-wide initiative that aims to speed up the roll-out of heat pumps in buildings, industry, and district heating.

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Rolling out heat pumps is central to the clean-energy transition and to achieving carbon neutrality in line with the goals set in the European Green Deal and the REPowerEU Plan.

The Platform is designed to bring together key players to collaborate, share ideas, experiences and best practices to promote sustainable heating solutions.

Objectives

https://energy.ec.europa.eu/topics/energy-efficiency/heat-pumps/heat-pump-accelerator-platform_en

Monitor and assess training programmes for HP installers

Objectives of the task:

- Monitor training programmes for heat pump installers across all EU Member States
- More than 50 training courses monitored across the EU

Know of any heat pump installers training programs?

Please let us know
hpacceleratorplatform@ehpa.org

1	Course	Country/Scope	Provider	Sources	E
2	Certified heat pump/solar thermal/ photovoltaic/Comfort/Ventilation Installer and planner	Austria	ait.ac.at// wfi.at	https://res.eu.eu/schemes/austria	
3	Certification of installers of small scale renewable energy solutions	Belgium	Renewable Energy Systems Certification Organisation (RESCERT)	https://res.eu.eu/schemes/belgium	
4	Heat pump basic training	Belgium	Various	https://res.cet.be/fr/wie-doot-wa/arkende-colidingsinstelling	
5	Heat pump refresher training	Belgium	Various	https://res.cet.be/fr/wie-doot-wa/arkende-colidingsinstelling	
6	7 modules on RES: PV Systems, Mini-wind, Heat Pumps, Biomass, Solar Thermal, HVAC, Hybrid Systems	Bulgaria	EnEffect	https://bulgaria.res.eu.eu/wp-content/uploads/2014_7_full_version.pdf	
7	Certification of installers for small RES systems	Croatia	Ministry of Construction	https://res.eu.eu/schemes/croatia	
8	Qualification Scheme for small scale RES installers	Cyprus	Energy Service of the Ministry of Energy, Commerce, Industry & Tourism	https://res.eu.eu/schemes/cyprus	
9	Solar thermal systems installer	Czech Republic	narodnikvalifkace	https://res.eu.eu/schemes/czech-republic	
10	Approval for renewable energy sources installer	Denmark	Danish Energy Agency	https://res.eu.eu/schemes/denmark	
11	Renewable Energy Installers in Estonian Qualification Framework	Estonia	kutsekoda // Ministry of Economic Affairs and Communications	https://res.eu.eu/schemes/estonia	
12	The voluntary certification system for the installers of the renewable energy systems	Finland	Motiva Ltd	https://res.eu.eu/schemes/finland	
13	Recognized as a guarantee for the environment (RGE)	France	Cofrac	https://res.eu.eu/schemes/france	
14	Exercise of a skilled crafts subject to a licence pursuant to the Crafts Code.	Germany	Chambers of skilled crafts and guilds of skilled crafts, acting as state authorities.	https://res.eu.eu/schemes/germany	
15	Heat pump online training - climate protection and heat pumps	Germany	BWP (German heat pump association)	https://ecoleam.eu/bsp/02/index.html	
16	Planning and installation of heat pump systems according to VDI 4645 Cat. PE	Germany	Various	https://res.eu.eu/schemes/germany	database
17	Training on VDI 4645 Sheet 1 Category PE "Planning and Construction" for heat pump systems for single-family and multi-family houses	Germany	Various	https://res.eu.eu/schemes/germany	database
18	Heat pump training according to VDI 4645 Sheet 1 Category P "Planning" + 1 day basic training on heat pumps and heating technology	Germany	Various	https://res.eu.eu/schemes/germany	database
	Expertise Category II for heat pumps and split air conditioning systems.	Germany	TÜV Rheinland Akademie GmbH	https://akademie.tuv.com/weiterbildungen/sachkunde-kaet-ii-uer-waerme-pumpen-und-split-klimatechnik	

Renewable Energy Skills Partnership

To empower workers with skills needed for manufacturing, installation and maintenance of heat pumps.

Actions:

- **EU Skills map:** quantify the HP workforce and the gap to reach HP targets
- Introduction of **financial incentives** at national level for installers to receive training
- Share a **checklist for installers** to simplify installation and reduce time.
- Carry-out EU-wide and national level **marketing and awareness raising campaigns**
- Encourage MS to develop **new categories and skills descriptions for use in educational schemes** for installers to better define the responsibilities and skill requirements and to attach new profiles.
- Support the **recruitment/training of staff in local public bodies** to enable them to carry out local heat planning.

EuropeON: Setting up the framework for attractiveness campaigns



« J'ai envie d'innover, de mettre en œuvre des nouvelles techniques »

Pauline

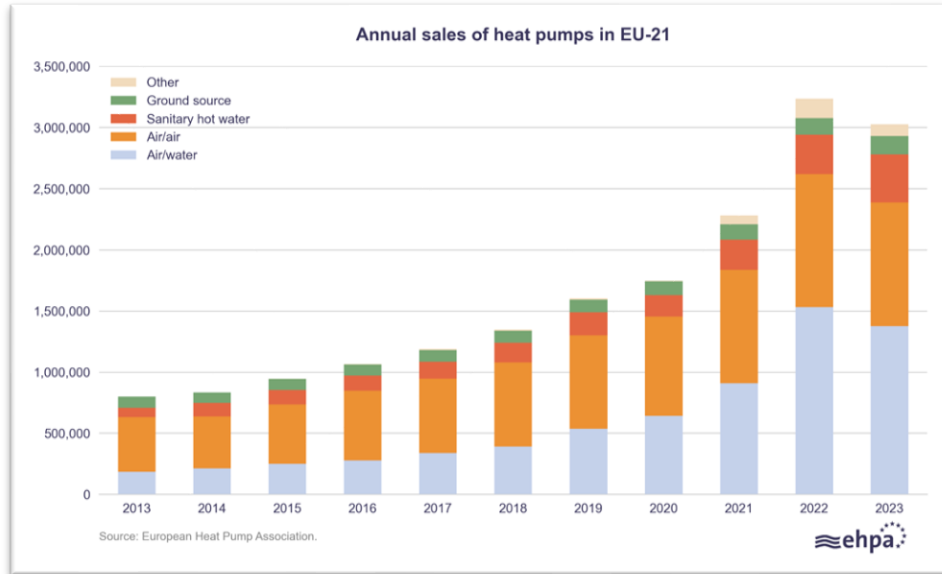


	Name of the campaign	"You can do so much more with technology" ("je kunt zo veel meer in de techniek")	Invisible Power ("Nakymaton voima")	Install Tomorrow	Enlightened ("Upplyst")	A - Recharge Electrical Skills
						B - Electrician Plus
Country	Netherlands	Finland	Belgium	Sweden	England	
Objective	Boost the awareness and attractiveness of technical education and jobs	Boost the awareness and attractiveness of technical education and jobs Making electricity-related jobs "visible"	Show the assets of the installation sector and the advantages of a technical education	Improve gender equality and inclusion in the electrical trade	Lack of <u>qualified</u> workers to deliver on Net Zero objectives	



EHPA Market Report 2025 will soon be available

Check and get the latest market data!



Do you want to know more about heat pump policies?

Check our overviews and reports on EHPA website.



[@helloheatpumps](https://twitter.com/helloheatpumps)



[European Heat Pump Association](https://www.linkedin.com/company/european-heat-pump-association)



[@EuropeanHeatPumpAssociation](https://www.youtube.com/channel/UC...)



www.ehpa.org

