organisatie duurzame energie

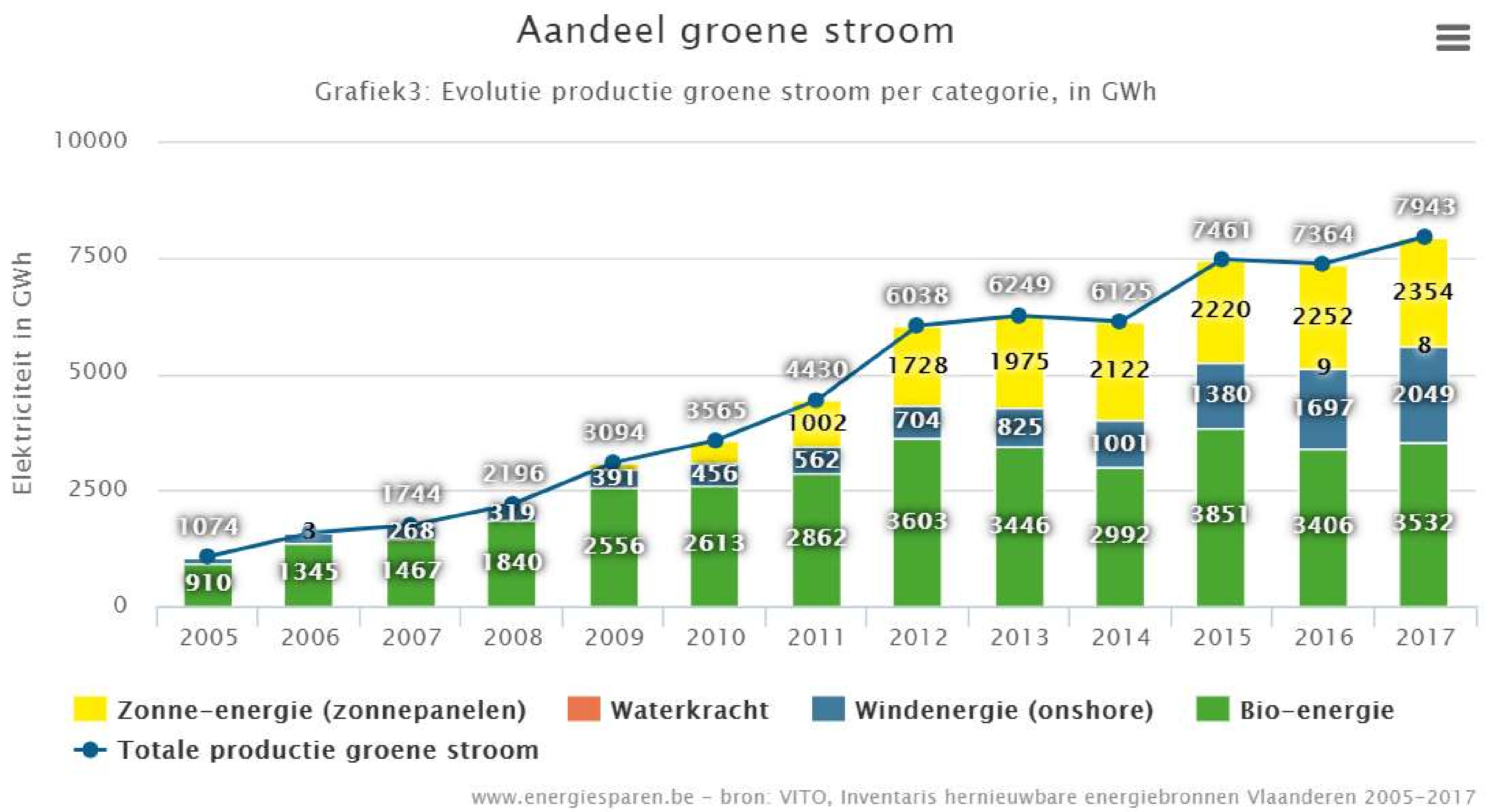
Solar market fluctuations

Lessons learnt from Flanders, Belgium

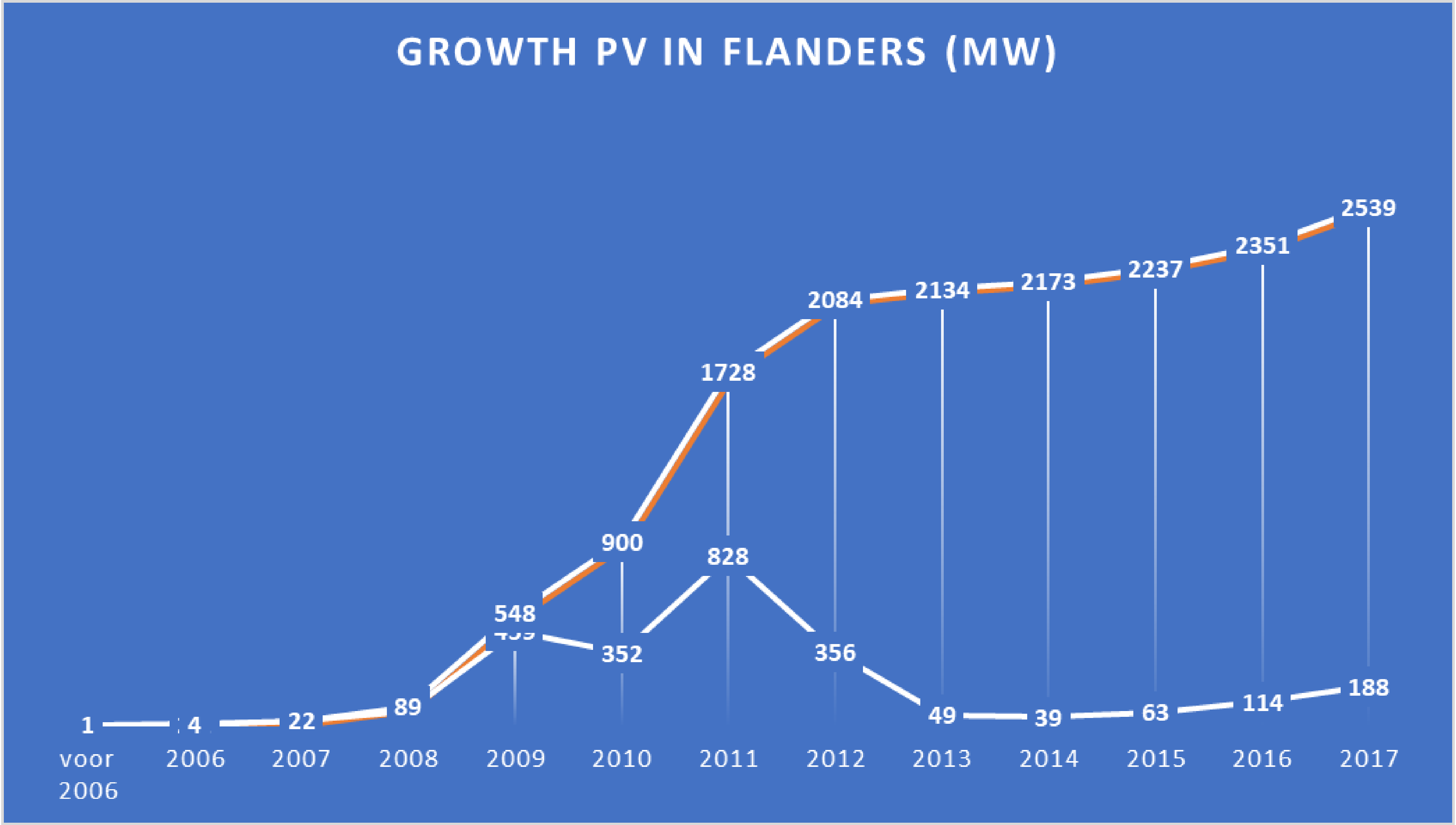
Solarise workshop, 12/9/2018, Portsmouth, UK

100% RENEWABLE

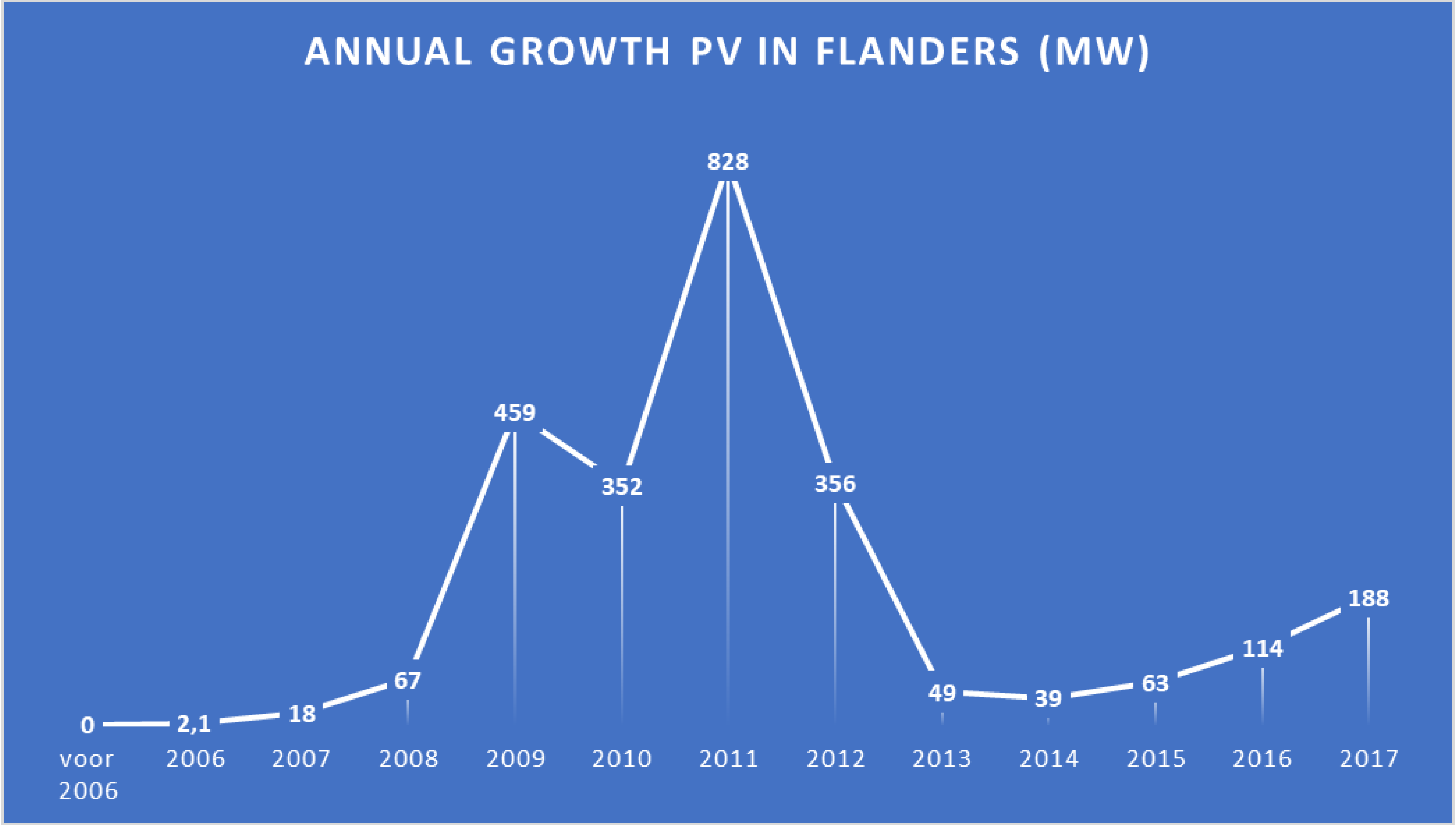
Solar PV in Flanders



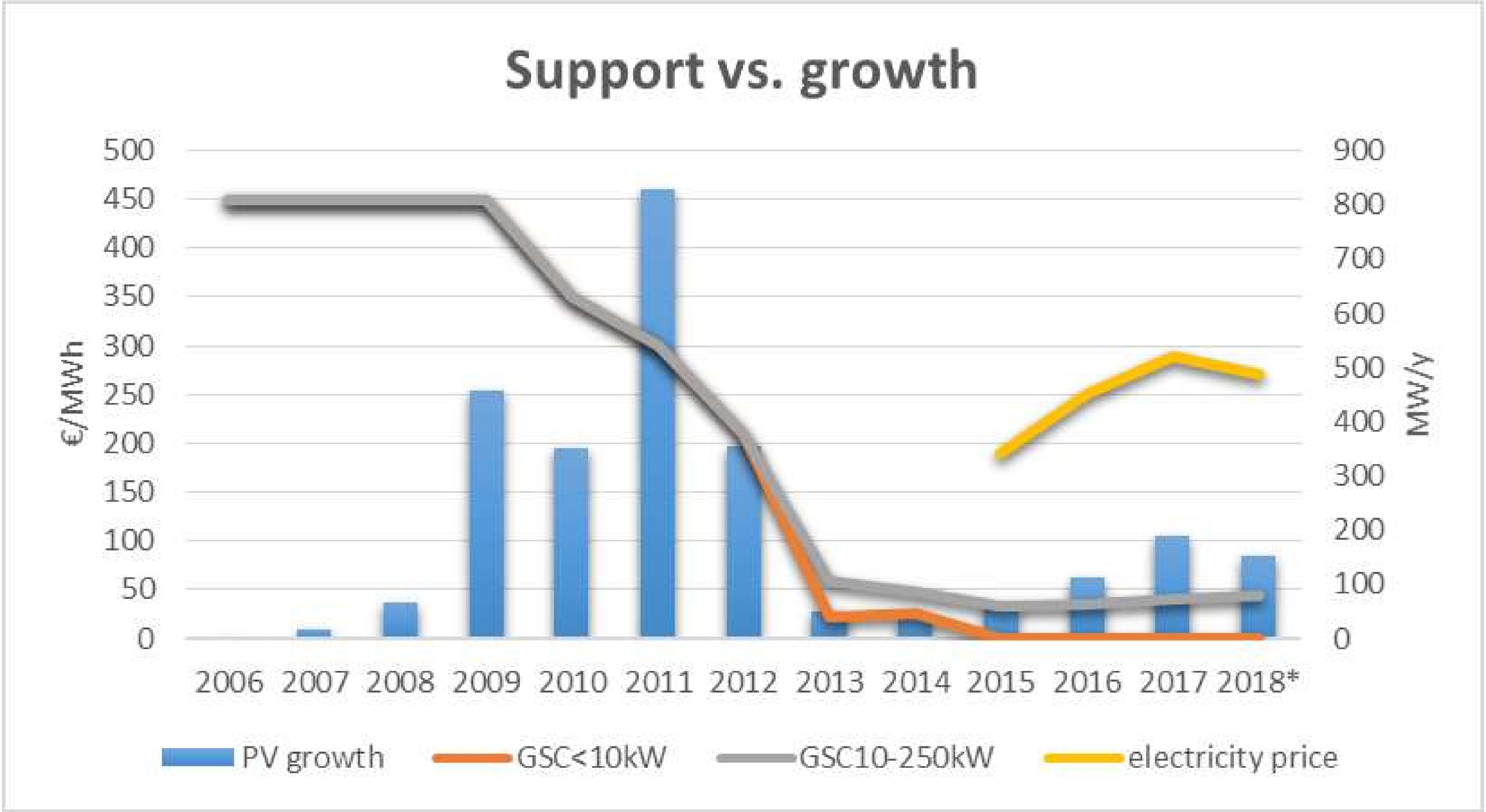
organisatie duurzame energie



ode
organisatie duurzame energie



organisatie duurzame energie



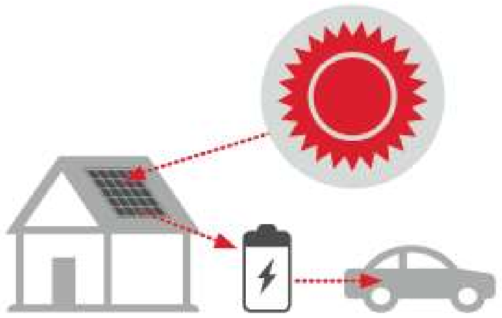
ode
organisatie duurzame energie

Aantal PV installaties Vlaanderen	≤ 10 kW	10 – 250 kW	>250 kW	Totaal
2016	268.549	5.085	987	274.621
2017	311.052	5.268	984	**317.304**
Aangroei	42.503	183	-3	42.683

- Residential PV is recovering, based entirely on simple net metering
  - Payback times of 6-8 years
  - Drivers: group purchases and electricity suppliers offering low cost installs and customer comfort
- Better recent support for mid-range projects
  - One mega project under construction – 100MW

ode
organisatie duurzame energie

Outlook

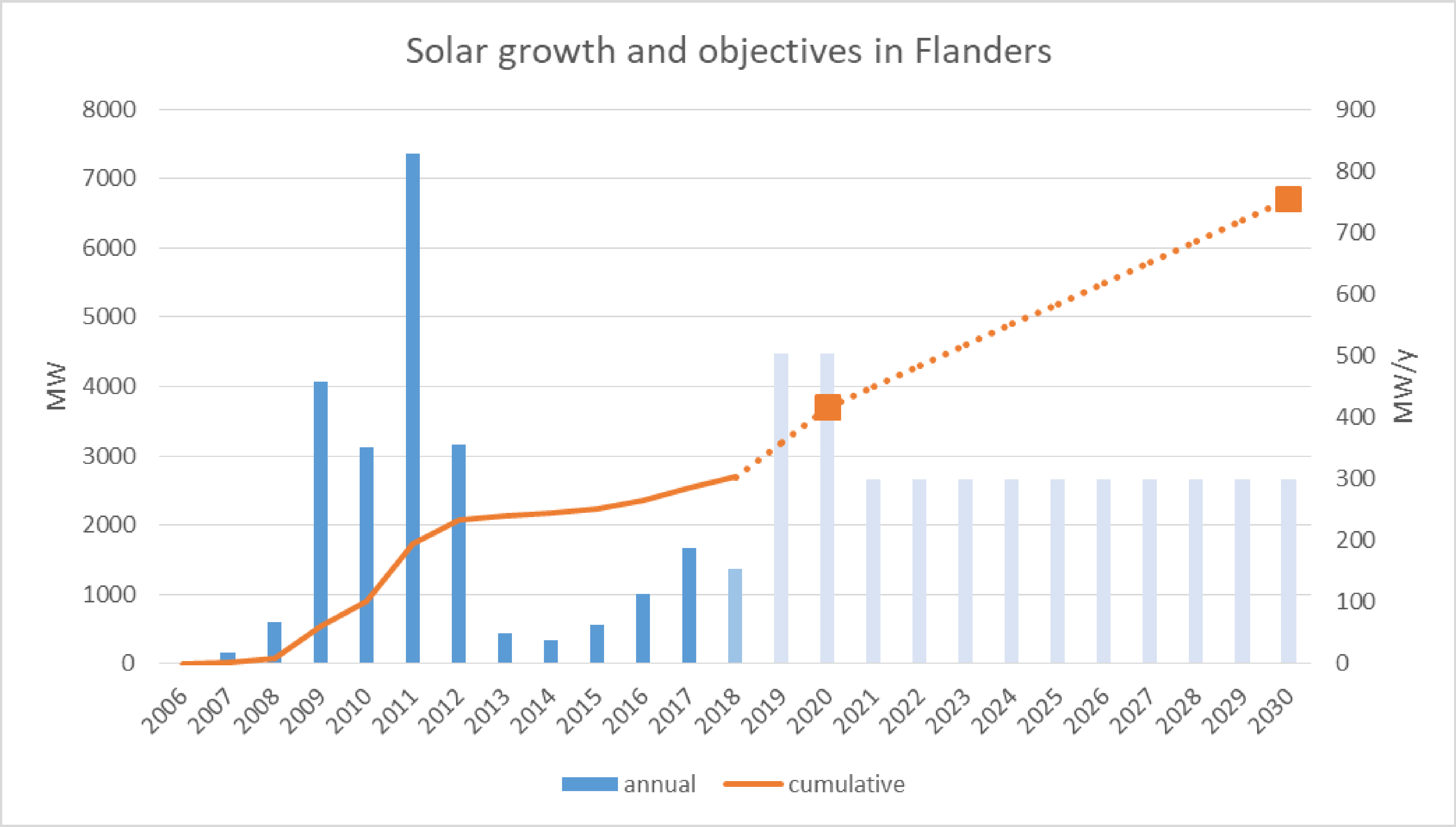


- Risks
  - pending (capacity) tariff changes
  - digital metering and end of simple net metering
  - tax shift from electricity to natural gas / heating oil

regulatory uncertainty

- Opportunities
  - Natural inclusion energy performant buildings (+heat pumps, storage, EMS…)
  - Further decreasing costs (end of Chinese import tarriffs)?
  - European attention to local energy communities – desire for customers to turn away from grid utilities
    - New business models / actors?

ode organisatie duurzame energie



ode
organisatie duurzame energie

Solar sharing

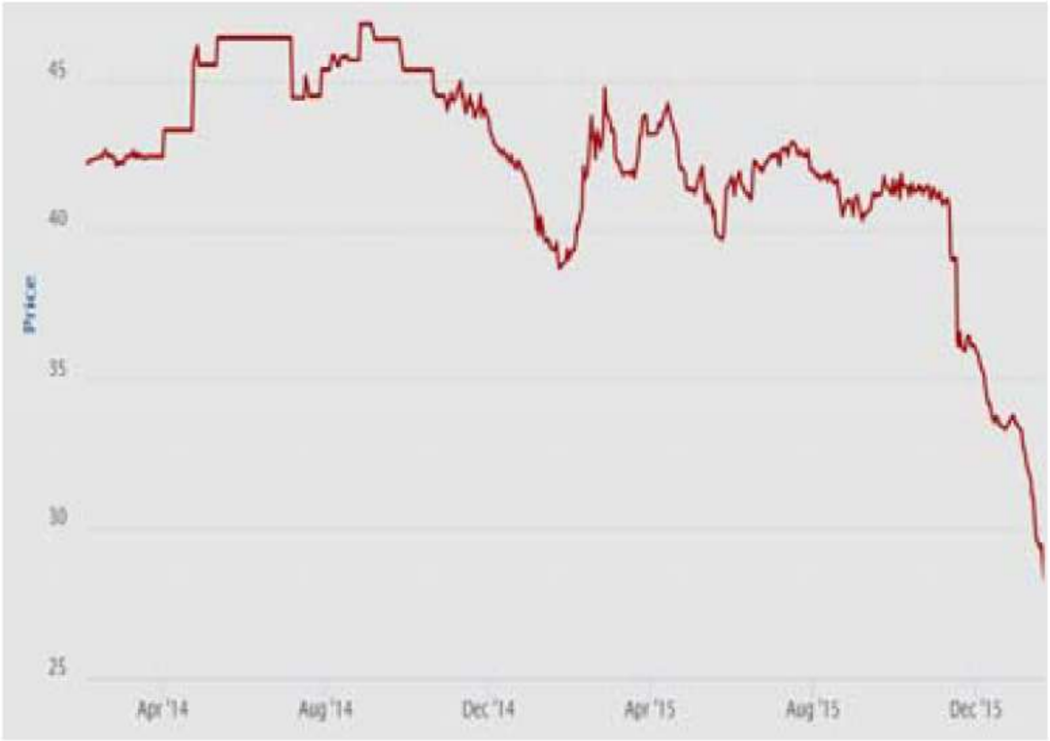
Current	Additional
Currently via **third party financing** taking the risk and the hassle (Co-operatives, ESCO's) IRR depends on % self consumption at solar site	**Virtual net metering** No business case if only energy Value increases if energy and grid fees (cfr. FR – local and digital) €13-16 c/kWh
	Direct lines
	Blockchain

organisatie duurzame energie

Reduce overcapacity of inflexible (baseload) capacity

Nuclear lifetime extension hampers investments in necessary new generation capacity and energy transition

Graph 1 Belgian Power Base Load Futures, Cal17
€/MWh



Federaal Planbureau, WP 9-16, Oktober 2016

organisatie duurzame energie

Bram Claeys, www.ode.be, bram.claeys@ode.be, @bramcla

organisatie duurzame energie