



Future of Solar Power in Europe: Perspectives for the Contracting Parties of the Energy Community

Alexandre Roesch, Policy Director

Energy Community – Renewable Energy Coordination Group – 10 November 2016

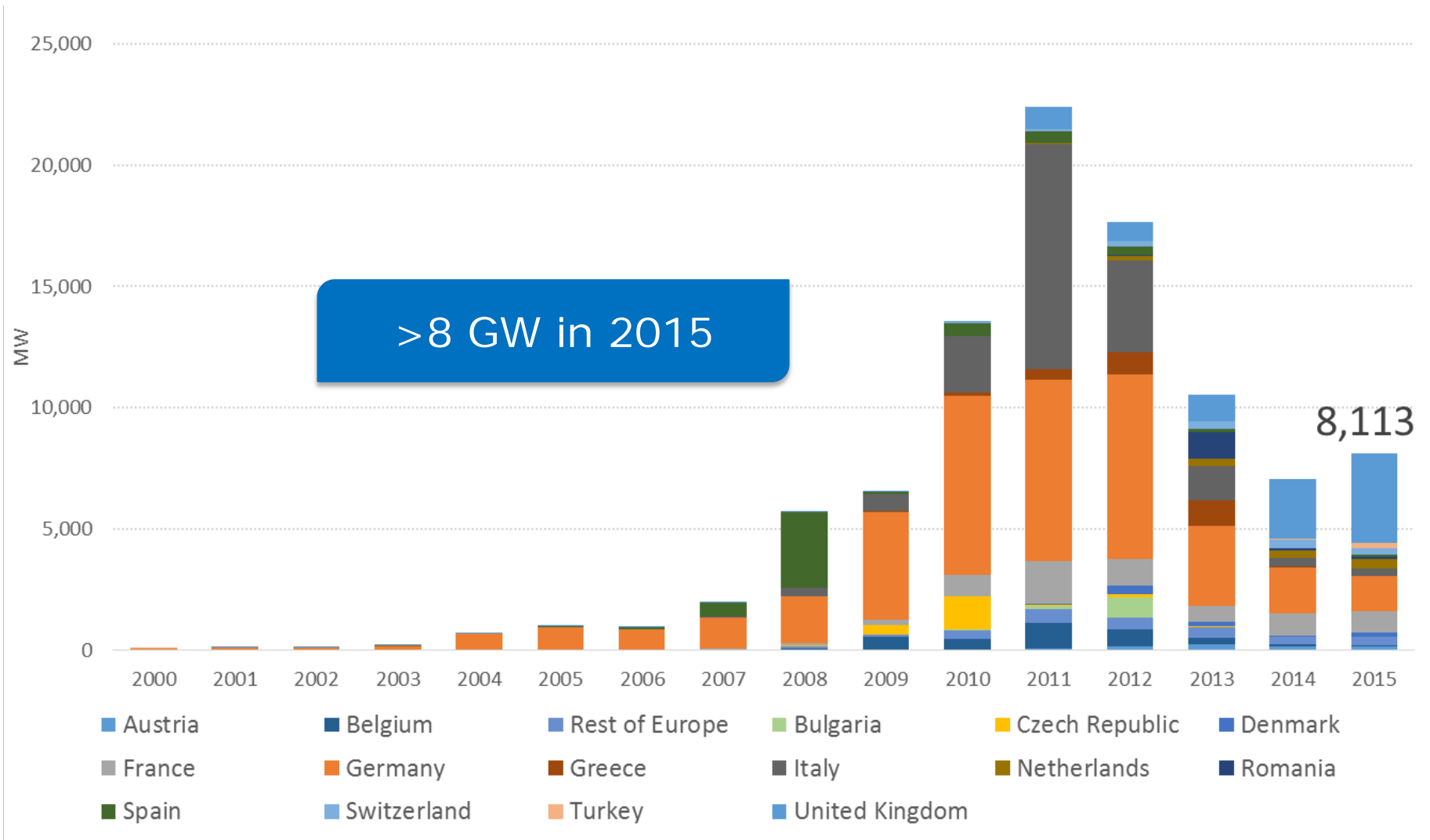
Who we are?



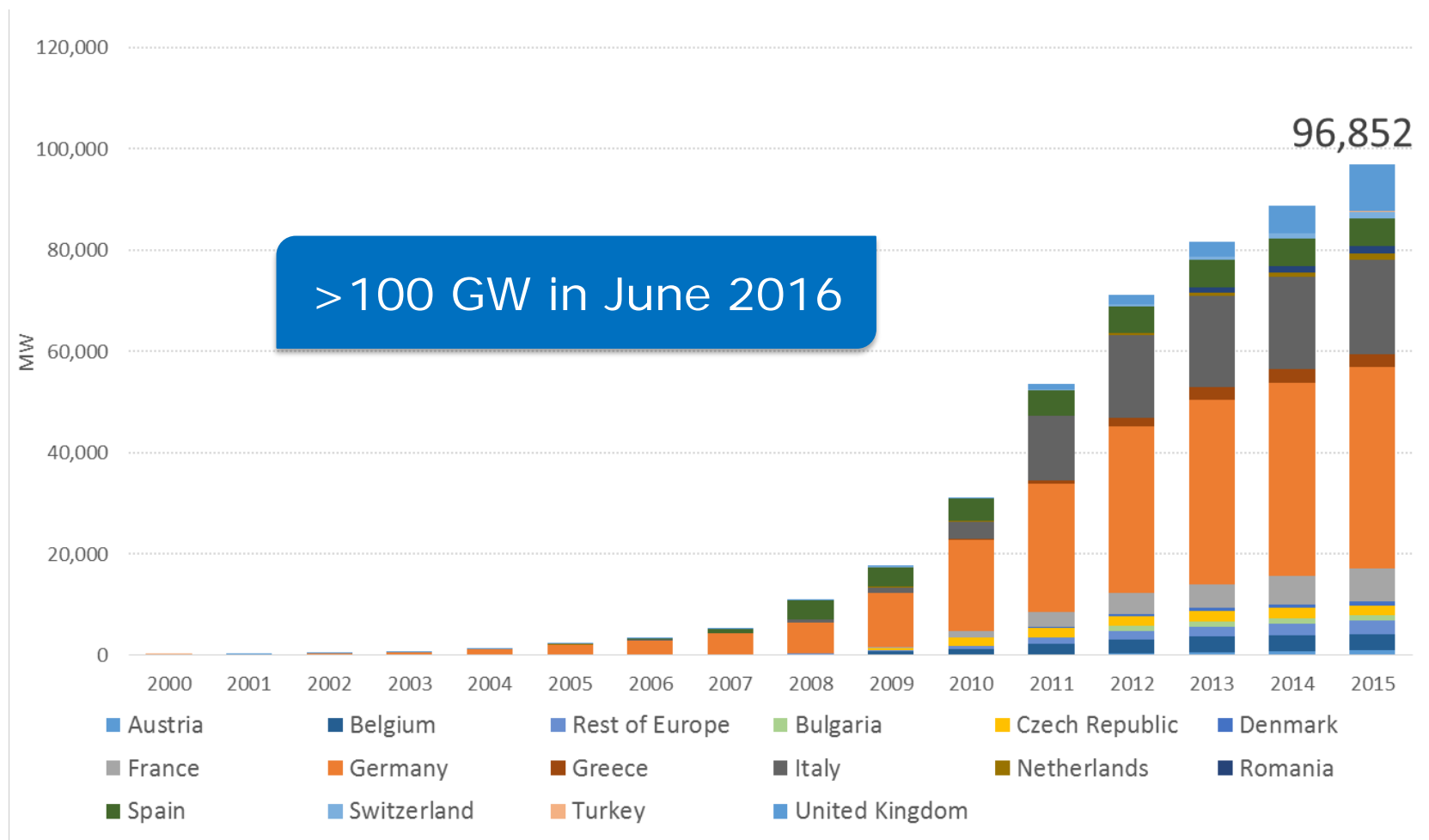
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European solar PV annual grid connection 2000 - 2015

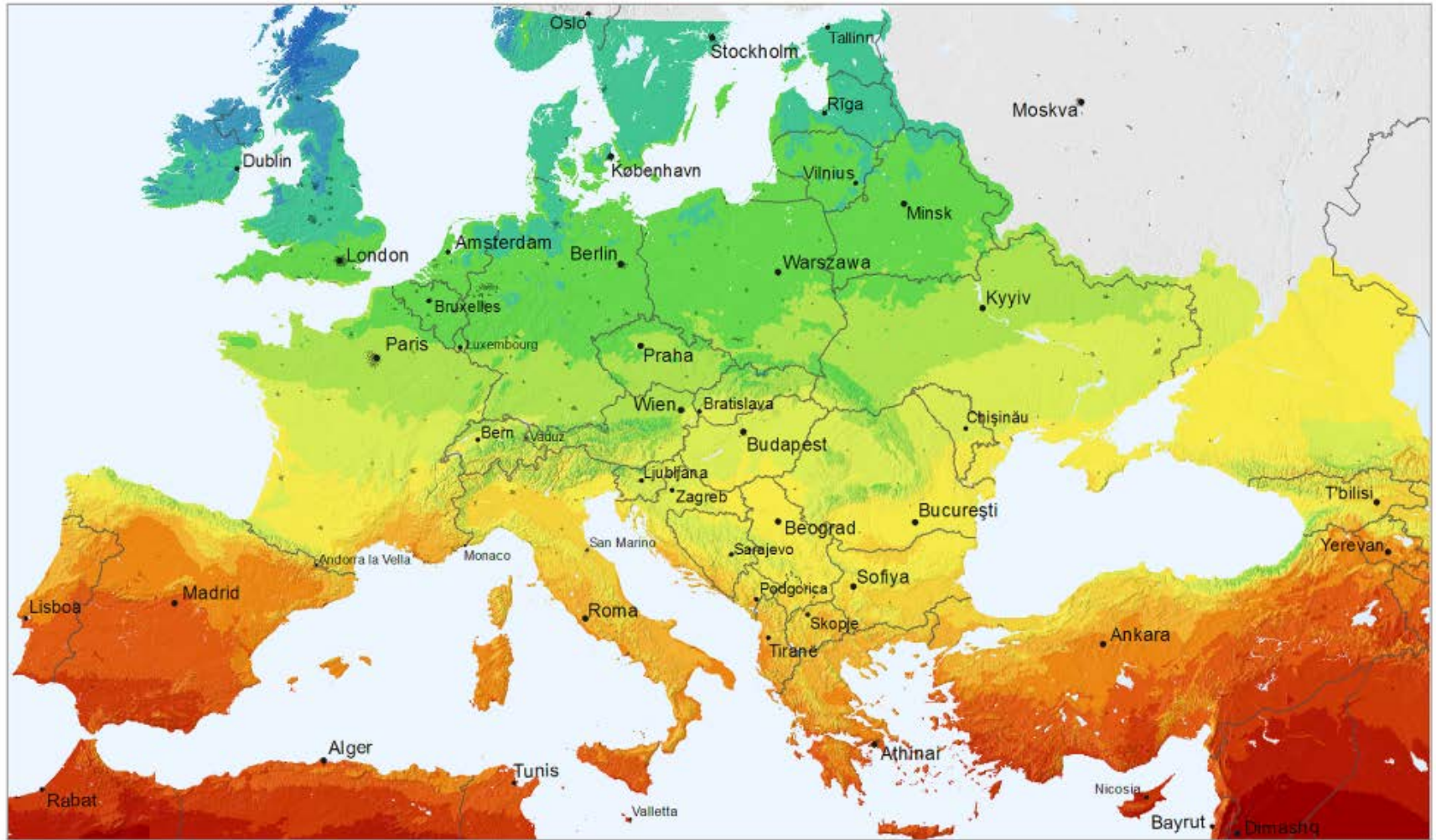


The European solar market: the 100 GW cap reached!

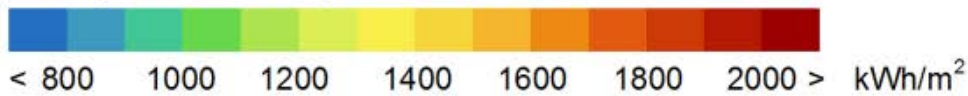


Global Horizontal Irradiation (GHI)

Europe



Average annual sum, period 1994-2010

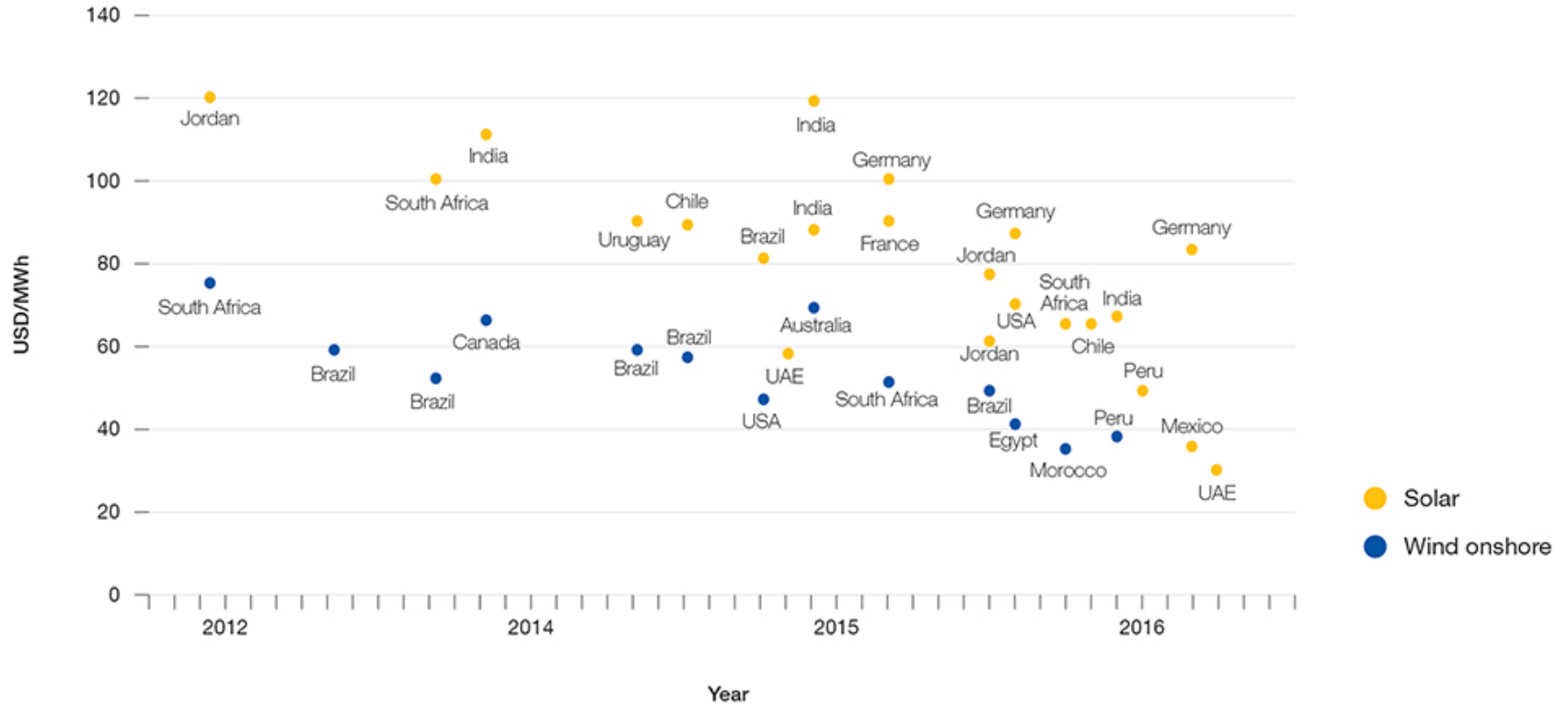


0 400 km

GHI Solar map © 2014 GeoModel Solar

Solar power: one of the cheapest power source

FIGURE 1 PPA PRICE OFFERS FOR SOLAR PV AND WIND ONSHORE POWER PLANTS IN DIFFERENT COUNTRIES



Source: International Energy Agency 2016

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Source: Global Market Outlook for Solar Power 2016-2020

New business models: make solar accessible to all

New trends:

- Self-consumption schemes (including collective ones)
- Joint purchasing programmes
- Third-party leasing financing
- Crowdfunding



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Great Solar Scheme Results

Solar Together Norfolk has been a huge success with over 800 householders accepting their personal offer of this council-led solar scheme. In the coming months all solar panels will be fitted on the rooftops of houses in Norfolk.

UK's first council-led collective solar scheme

Thank you for your interest and contribution to make Norfolk one of the 'greenest' counties.



Register for upcoming schemes!

Find out more about Solar Together

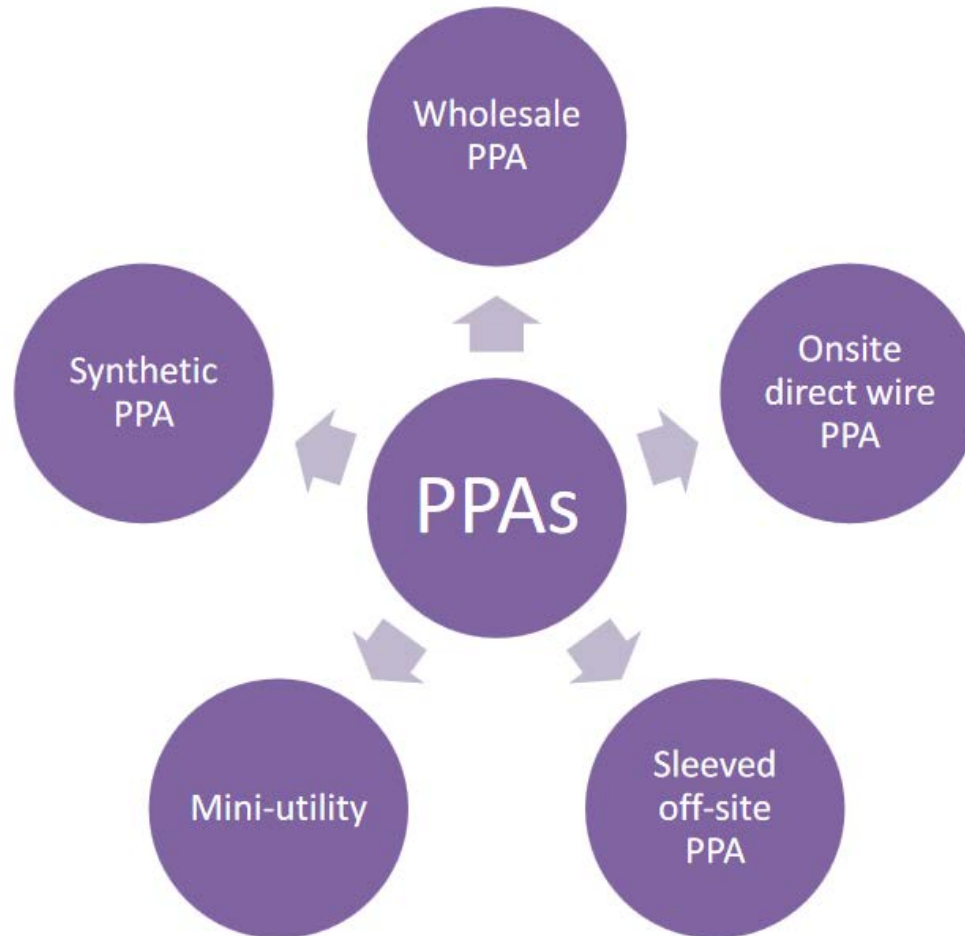
Auction results



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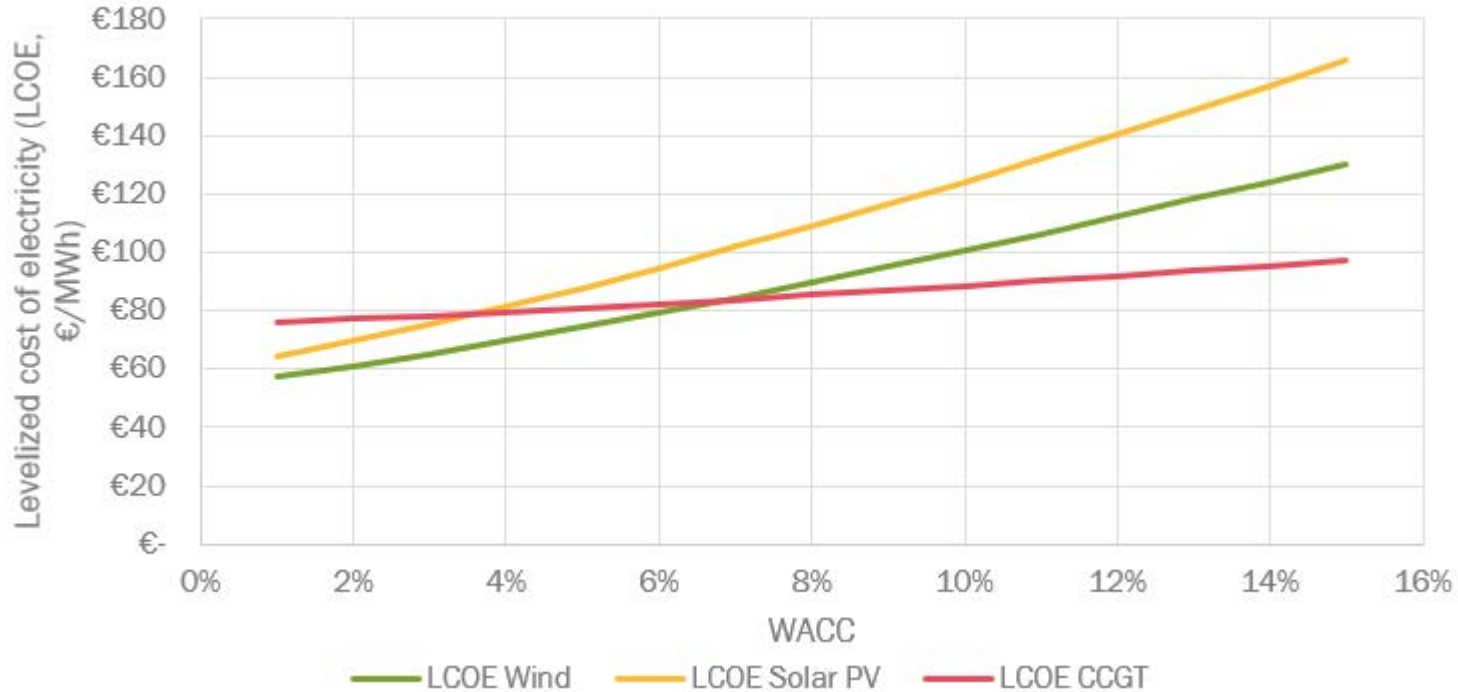


New business models: provide long-term remuneration certainty via PPAs



How can the regulatory framework help?

MESSAGE #1: Cost of capital is a key driver of generation cost



Levelized Cost Of electricity (LCOE) in function of the Weighted Average Cost of Capital (WACC)

Source: Market4RES project

MESSAGE #2: soft costs can be addressed via one-stop shops

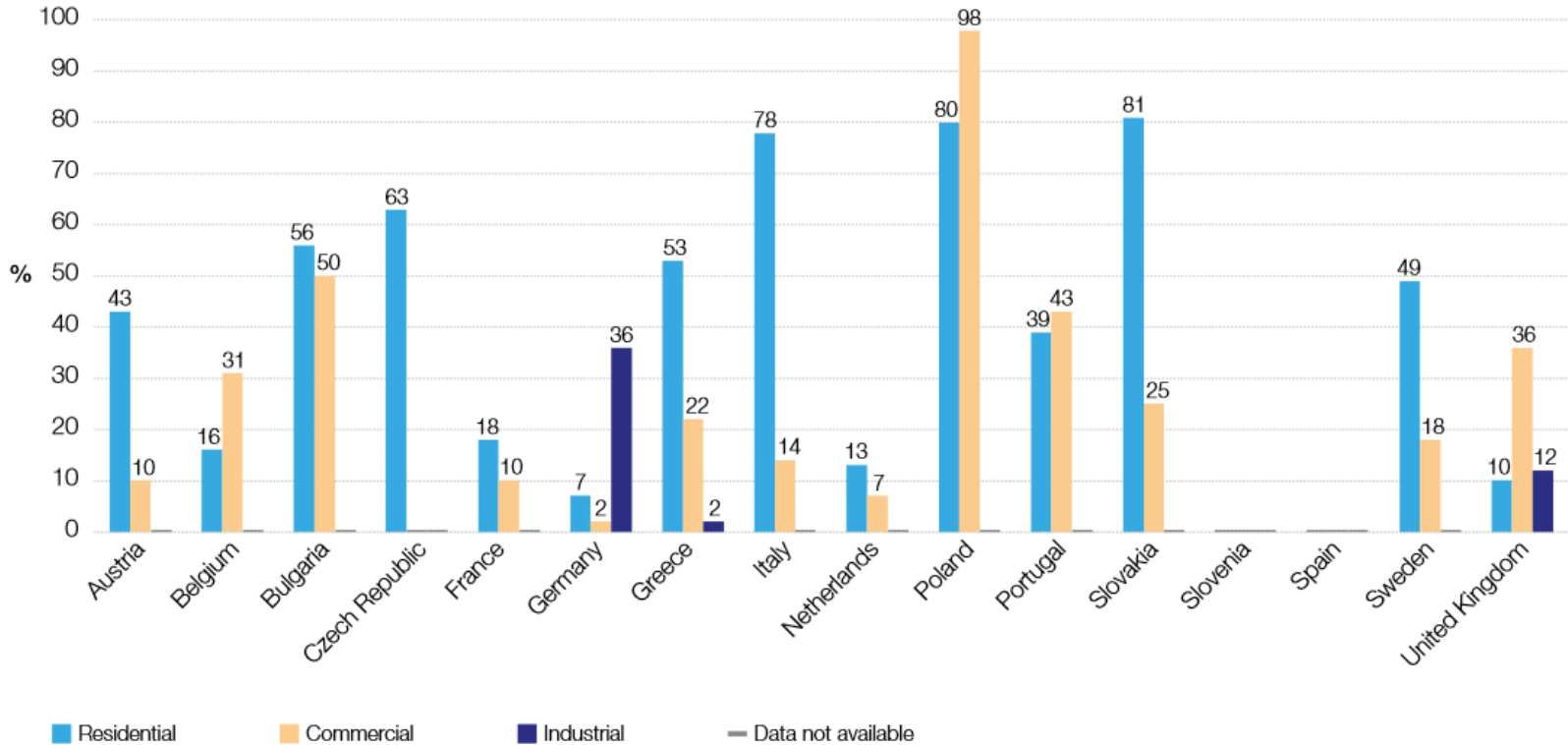
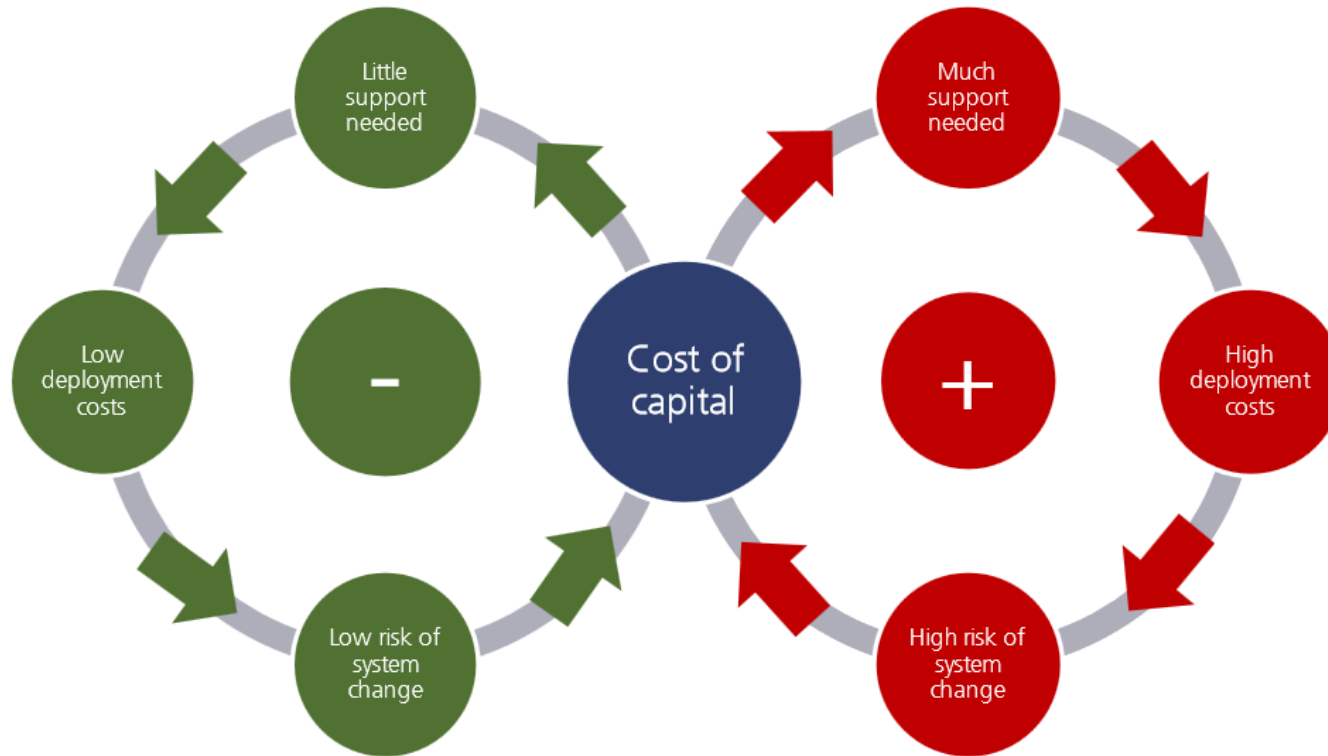


Figure 1.1 - PV project development: Legal-administrative Cost Share

MESSAGE #3: visibility and stability for investors is key up to and beyond 2020



De-risking (CAPEX intensive) investments will make the energy transition cheaper

Policy recommendations: where to focus the efforts?

1) Large-scale solar: technology specific tenders

- Transparent, multi-year roadmap of auctions (visibility on frequency and volumes)
- Strong pre-qualification criteria to exclude non-serious players
- Price-only tenders as the standard schemes
- Strong monitoring process and staggered liability approach

2) Small-scale solar: enabling framework for self-generation and consumption

- Encourage business models addressing upfront investments
- Allow for collective self-consumption models
- Ensure grid tariffs and tax regimes are fit for the energy transition

3) For all segments: reliability of the regulatory framework

- No retroactive measures!
- Reduce soft costs (administrative processes, grid connection procedures)

4) Market design: ensure remuneration from the market

- Liquid intraday and balancing markets
- Encourage flexibility provision - solar can deliver system services

JOIN THE ENERGY TRANSITION

Alexandre ROESCH, Policy Director
a.roesch@solarpowereurope.org

