



# **Solar energy FOR and BY the people in the Netherlands**

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Board Member Holland Solar

Dutch association for solar energy

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130 members from all segments of the Dutch solar supply chain

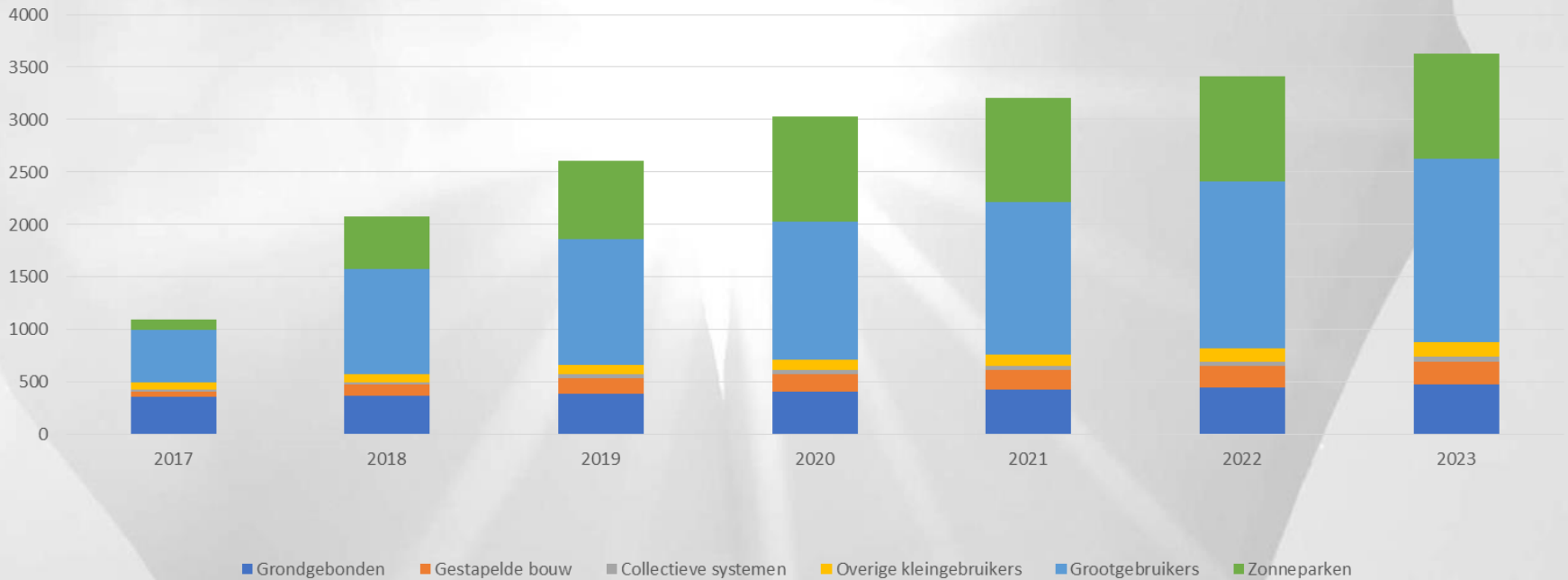
- Installers
- Distributors
- Consultants
- Manufacturers
- Research institutions





# Estimate Dutch market 2017-2023

Verwachtingen PV-markt 2017-2023





# Segmentation of the Dutch solar market by financial driver/subsidy scheme

## **Net metering market**

- Private households
- Apartment buildings
- SMEs with that qualify as “small consumers”

## **“Postcode rose”**

- Energy cooperatives generating energy for private members and SMEs locally

## **SDE+ market**

- Companies that qualify as “large consumers”
- Solar parks



# Motivations for projects financed by (groups of) individuals

## **Motivations for solar BY the people (projects initiated and managed by private individuals and local initiatives)**

- Investment
- Promote (local) renewable energy
- Promote local employment

## **Motivation for solar FOR the people (initiated by professional parties)**

- Get local buy-in for large solar projects
- Get development upside by developing community financed project
- Support core business (of utilities)



## How solar FOR and BY the people fits into the Dutch market segments

	<b>Ground mount and large commercial roofs (&gt; approx. 1 MW)</b>	<b>Small commercial roofs (&lt; approx. 1 MW)</b>	<b>Residential roofs</b>
<b>Business case based on</b>	<b>SDE+ subsidy (feed-in tariff)</b>	<b>Postcode rose and SDE+</b>	<b>Net metering</b>
<b>BY the people</b>	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
<b>FOR the people</b>	Slice of large project made available for crowd funding by developer	Energy cooperative initiated by professional party	Operational lease



# Example large system with slice of community financing

**Project:** Wieringermeer

**Size:** 27.5 MWp

**Sponsor:** Nuon

**Business case based on:** SDE+

**Community participation:** Local community



	Ground mount and large commercial roofs (> approx. 1 MW)	Small commercial roofs (< approx. 1 MW)	Residential roofs
<b>Business case based on</b>	SDE+ subsidy (feed-in tariff)	Postcode rose and SDE+	Net metering
<b>BY the people</b>	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
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# Example small commercial roof – BY the people

**Project:** DE Ramplaan

**Size:** 370 kWp

**Sponsor:** Local energy cooperative

**Business case based on:** Postcode rose

**Community participation:** Local community 100%



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<b>Business case based on:</b>	SDE+ subsidy (feed-in tariff)	Postcode rose and SDE+	Net metering
<b>BY the people</b>	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
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# Example ground mount – BY the people

**Project:** Zonnewijde Breda

**Size:** 1.7 MW

**Sponsor:** Local energy cooperative

**Business case based on:** SDE+

**Community participation:** Local community 40% (60% debt)

**Crowd funder:** Zonnepanelendelen



	Ground mount and large commercial roofs (> approx. 1 MW)	Small commercial roofs (< approx. 1 MW)	Residential roofs
<b>Business case based on</b>	SDE+ subsidy (feed-in tariff)	Postcode rose and SDE+	Net metering
<b>BY the people</b>	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
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# Example Postcoderoos – FOR the people

**Project:** Volkswagen-Audi dealership Amersfoort

**Size:** 300 kWp

**Sponsor:** Postcodestroom

**Business case based on:** Postcode rose

**Community participation:** Local community



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Business case based on	SDE+ subsidy (feed-in tariff)	Postcode rose and SDE+	Net metering
BY the people	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
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# Example residential systems FOR the people

**Project:** Solease lease portfolio

**Size:** 200 systems

**Sponsor:** Solease

**Business case based on:** Net metering

**Community participation:** National



	Ground mount and large commercial roofs (> approx. 1 MW)	Small commercial roofs (< approx. 1 MW)	Residential roofs
<b>Business case based on</b>	SDE+ subsidy (feed-in tariff)	Postcode rose and SDE+	Net metering
<b>BY the people</b>	Too large to develop by cooperative	Energy cooperative initiated by local community	Self financed or with loan
<b>FOR the people</b>	Slice of large project made available for crowd funding by developer	Energy cooperative initiated by professional party	Operational lease



## Trends

- Crowdfunding will be increasingly important to get buy-in of local communities for large ground mount projects
- Banks will increasingly focus their DD on the crowd funders
- Professional parties will take the lion's share of developments with (a slice of) crowd funding



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