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Flanders leading the way in Belgium with photovoltaics

In February 2010, Flemish (Belgian) PV market grew by almost 220 MWp to an accumulated capacity of 312 MWp. Netherlands-based Polder PV screened in detail the world's 6th market as of 2009. During the night of March 10/11, the four, long-awaited, new pdf documents suddenly appeared, seemingly having updated automatically on the website of the Flemish energy market regulator VREG. These documents are the key to ongoing research by Dutch analyst Polder PV (The Netherlands) into this rapidly growing solar market, representing the situation in 2009 for 90% of the whole of Belgium(which consists of the Flemish Region, the Walloon Region, and the Brussels Capital Region).

By Peter J. Segaar



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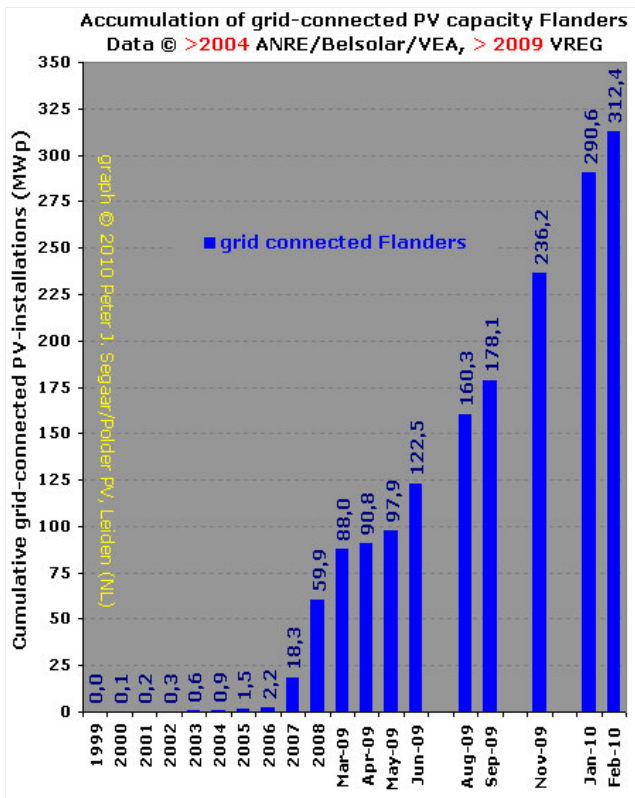
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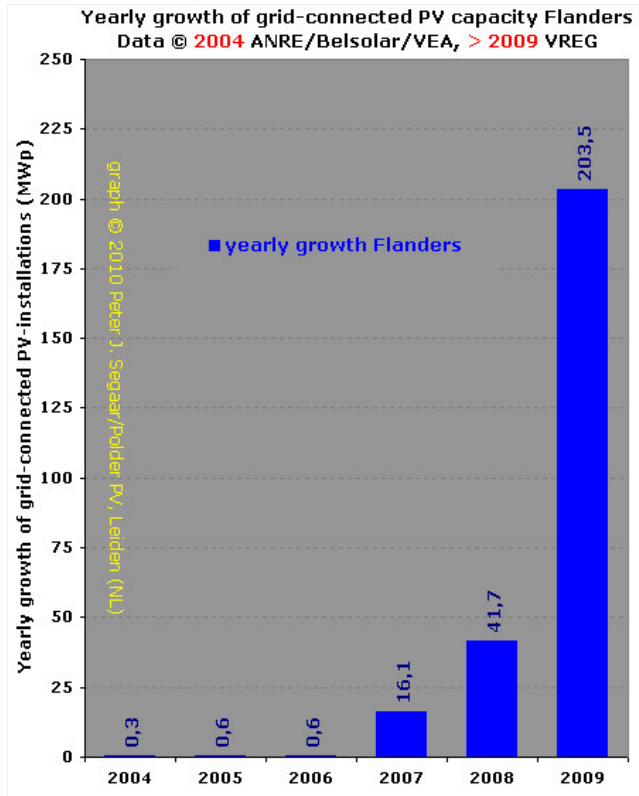
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The Dutch speaking (Flemish) northern part of Belgium, Flanders (in Dutch: "Vlaanderen"), with a population of approximately 6.2 million (excluding the Flemish population in the capital, Brussels, which is administered separately), has shown strong growth in its appetite for photovoltaics since the region's government initiated its extremely appealing package deal in 2006. This consists of a combination of 45 eurocents/kWh in green certificates that can be easily exchanged with the local net manager for private market net metering up to an annual balance of zero and a maximum installation size of 10 kWp together with tax incentives. The latter have even been temporarily improved under the terms of a "crisis" package. These can be seen as a bonus on top of what is already a lucrative incentive regime.



Graph adapted from data for the Belgium statistics page on www.polderpv.nl, showing the annual and monthly accumulation of grid-connected PV capacity for Flanders alone. The end of December 2009 value interpolation is 263.4 MWp on the basis of data provided by VREG (the report for 2009 is not yet available). At the end of February 2010, the accumulation already reached was 312.4 MWp. All illustrations: Flanders data from VREG; graphs made by Polder PV.

The results of the combined incentives were staggering. Specifically, this was because of the apparent effectiveness of mouth-to-mouth advertising in this small country, and the information campaign on renewables conducted by various organizations also seems to have been highly successful (accurate information presented with clarity and in a stimulating way). Alongside high interest from the press and a growing installation sector, PV modules quickly became a "normal" element in many Flemish streets and were even awarded the title of "product of the year 2009" by readers of the newspaper "De Standaard." The administrators in the small VREG office were soon overwhelmed by the rapidly growing market, and it was not long before a large number of industrial roof size projects were also added to this. Many of these were of considerable size, ranging from a few dozen up to a few hundred kWp per installation. Some large free field installations appeared, culminating in the largest installation of all in Heusden-Zolder with a capacity of 4,704 MWp. Even installers from the world market of Germany and from the Netherlands were attracted to get much of the work done. Growth in 2009 was so intense that VREG was unable to produce an update report for each month. Nevertheless, it was possible to monitor market growth in Flanders at a high level of detail—albeit with an occasional time lag of (at most) two months—and this growth has been published and repeatedly updated on the Polder PV website.



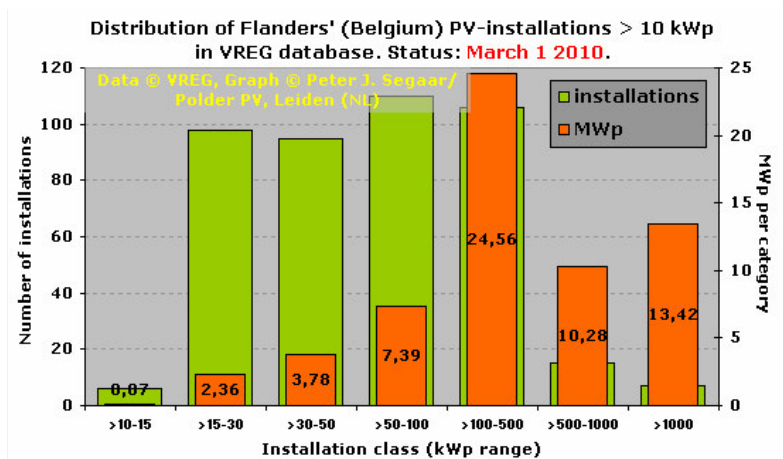
Annual growth of the Flanders grid-connected market for the period 2004-2009. Annual market growth has increased significantly since the start of the feed-in regime in 2006, particularly in 2009.

The Flemish market to date

In 2009, the market grew from approximately 204 MWp to an accumulation of over 263 MWp by the end of the December of that year. The average monthly growth percentage was in the double-digit range (approx. 15% average in relation to capacity added). New PV-systems installed amounted to approx. 41,500: nearly 3,500 a month with an end-of-year accumulation of more than 52,000 PV systems. At the end of 2009, average system size was approximately 4.9 kWp (including all larger installations).

Thanks to the new monthly reports produced by VREG containing updated figures for the end of February 2010, PV accumulation was already amounting to 312.4 MWp of nominal capacity, thus signaling once again growth of approximately 24.5 MWp a month in the 2010. An important footnote to this is that a legally defined transition period has been in force up until the end of February 2010 whereby full updates and approvals under the former 45 eurocents/kWh regime applied to installations with modules already on roofs as of December 31, 2009, but still lacking an inverter (as they were hard to obtain in that period). For twenty years as of January 1, 2010, all new installations will "only" receive 35 eurocents/kWh (certificate value). Nevertheless, with this combination of incentives together with major discounts in module prices, Flanders remains an extremely attractive PV market. As of now, Flanders alone has already realized 50.7 Wp per capita in accumulation.

By January 2010, the accumulated capacity of PV installations in Flanders already had the largest amount of nominal power in relation to all other renewable energy alternatives. Naturally enough, this was not the case in terms of energy output (the reason being due, in part, to the frequently forgotten or ignored fact that nothing can be expected from a light harvesting energy system at night). All the same, the number of green certificates issued by the overworked VREG office has risen dramatically in just a short period of time, already amounting to 188 GWh by the end of February 2010 and with a large backlog of certificates yet to be issued.



Detailed analysis of the large market segment in Flanders: installations > 10 kWp. 437 installations by the end of February 2010 with a total capacity of 61.86 MWp and a high impact on the > 100 to 500 kWp category.

The largest new PV system reported in the February 2010 update was the 770 kWp installation with multicrystalline Scheuten Solar modules at the JUMA Beton industrial hall in Lommel. To date, however, only 730 kWp have been registered by VREG for that PV-system. VREG keeps an intriguing track record for installations larger than 10 kWp. Polder PV has analyzed this in detail. The largest segment of that market is that of installation sizes between 100 and 500 kWp: 106 installations accumulated (16 new in the February 2010 report) with a total capacity of 24.6 MWp (3.4 MWp new in February 2010 update).

From these detailed data, it was possible to extrapolate details concerning the "small" market of installations up to 10 kWp: by the end of February 2010, already accumulated a total of 57,756 "small" installations with a capacity of 236.77 MWp and an average system size of 4.1 kWp, assuming that the basic VREG data used are correct (additions and corrections may be incorporated later).

Walloon Region, Brussels Capital Region, and Belgium as a whole

From data gathered by the market regulators CWAPE (Walloon Region) and BRUGEL (Brussels Capital Region), it became apparent that growth was also occurring rapidly there (different incentives, different details). In 2009, the Walloon Region may have grown by 21 MWp in 2009 to an accumulated total of 30 MWp. The Brussels Capital Region accumulated 3 MWp with 2.3 MWp of new PV systems in that year. In 2009, total market growth for the whole of Belgium may have been in the order of 227 MWp and an accumulation of 296 MWp. Other sources mention higher accumulations for the whole country: 233 MWp (BelPV) or even 275 MWp (Photon International, February 2010). However, in its market overview published on March 30, 2010, EPIA reports slightly less: 292 MWp. It is still unclear which "administrative" year will be allocated to the enormous 40 MWp Katoen Natie project at 4 different locations in Flanders (possible final realization in February 2010). It has not yet been published officially in the VREG records, and several other major projects are also absent. The huge 4.2 MWp project at the Balta Group complex in Sint-Baafs-Vijve (Enfinity installation) and the Willebroek Noord 2.6 MWp project (Solar Access installation, financed by the Dutch nuclear power plant co-owner Delta and sustainable bank ASN) cannot yet be found in the VREG statistics.

The Belgian PV market (and, within this, the Flemish PV market in particular) is anticipated to continue growing with considerable speed. In its February 2010 issue, Photon International mentioned possible growth for Belgium in 2010 of 500 MWp according to predictions made by its independent sister organization Photon Consulting in Boston. Photon International rated the small nation of Belgium as the sixth top PV market for 2009. As regards the private market, Belgium is already in second place with respect to installation numbers according to Germany's renowned and informative PV-installation dominated European Sonnenertrag database. This records the monthly production data for 615 Belgian installations (mostly Flemish) as being good for 2.7 MWp (average size: 4.4 kWp; status as of March 30, 2010).

Edora, the Belgian sustainable energy organization, which claimed 304 MWp of photovoltaic accumulation for Belgium in 2009, predicted in a recent study that PV could reach an accumulation of 3.44 GWp in 2020 and even 16-18% of total energy consumption by all renewable resources, this being co-dependent on the success of efficiency measures and/or economic growth factors.

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Detailed PV-market data from Belgium with graphs on the Dutch website Polder PV:
http://www.polderpv.nl/PV_Belgie_marktcijfers.htm

Installations registered with Europe's largest (mostly private) photovoltaic installation database and probably also the largest of its kind in the world:
http://www.sonnenertrag.eu/eu_vergleich.php

Official website of VREG (market regulator of Flanders, Belgium):
<http://www.vreg.be/nl/index.asp>

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