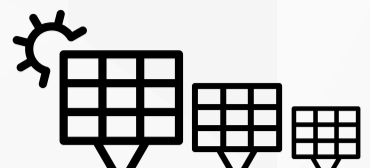


STATE OF DUTCH SOLAR

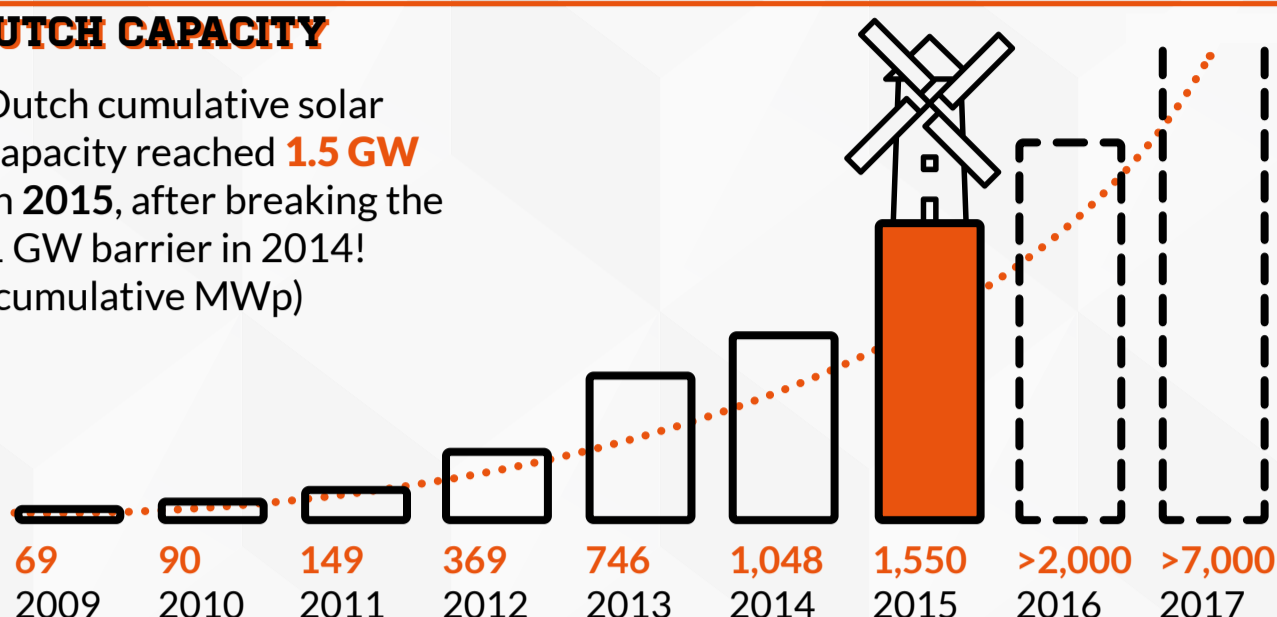
NEW SYSTEMS

2014: 75,500 new residential solar systems
 2015: ~ 125,500 new residential solar systems
 2016: ~ 135,000 new residential installations expected



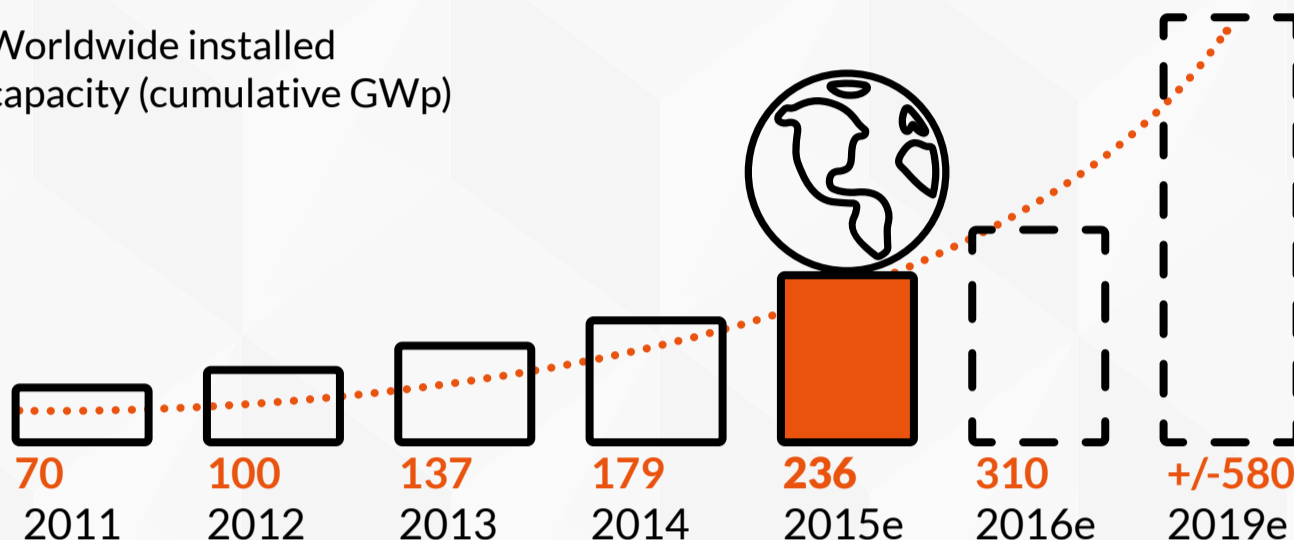
DUTCH CAPACITY

Dutch cumulative solar capacity reached **1.5 GW** in 2015, after breaking the 1 GW barrier in 2014! (cumulative MWp)

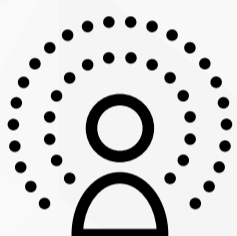


GLOBAL PERSPECTIVE

Worldwide installed capacity (cumulative GWp)



SOLAR CAPACITY PER INHABITANT



Cumulative: 1,550 MWp
 Wp / Dutch inhabitants: 92 Wp



For comparison, situation in Germany:

Cumulative: 39,700 MWp
 Wp / German inhabitant: 488 Wp



SOLAR ENERGY IN THE MIX

Generated solar as a percentage of our total energy consumption:

2015: (1,525 MWp) ≈ 1.3%
 2020: (7,000 MWp) ≈ 6.2%



REMARKABLE TRENDS

Projects are becoming bigger

Multiple 10+ MWp parks announced
 (See Solarplaza's top 25)

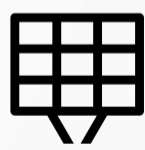
Largest project announced (85MW) almost 15x current largest project (Ameland, 6MW)



More ground mounted projects

2015: 6 vs 3 in 2014
 (See Solarplaza's top 25)

2016-2017: 19 ground mounted projects
 (See Solarplaza's top 25)



Growth cooperative projects

Large growth co-op projects expected by Hieropgewekt. nl, huge growth next year
 2015: 50 co-op projects realised, 100 projects cumulative (5 MW)
 2016: 55 co-op projects expected, 155 projects cumulative (25 MW)



New panel applications

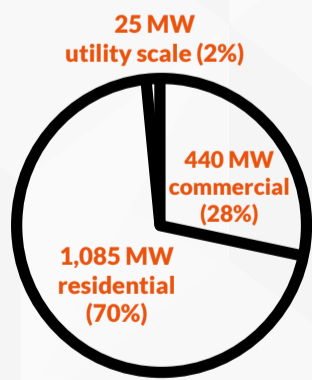
Floating: 3 (or 4) floating projects upcoming, pilots currently running. Benefits: extra space, water reflection, cooling effect of water
Two sided panels: utilize light reflected by water surface, way more energy production for almost same amount of money.



FACTS & FIGURES

Market segmentation 2015:

~ 25 MW utility scale (>1MW), 1,085 MW residential (70% of 1550), 440 MW commercial.



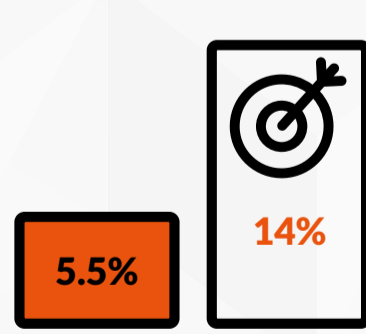
Percentage of houses with solar panels

Around 350,000 residential solar systems in NL. Based on 5 million family houses in NL means ca. 7% (more than 1 out of 20) dutch family houses have a roof with PV panels

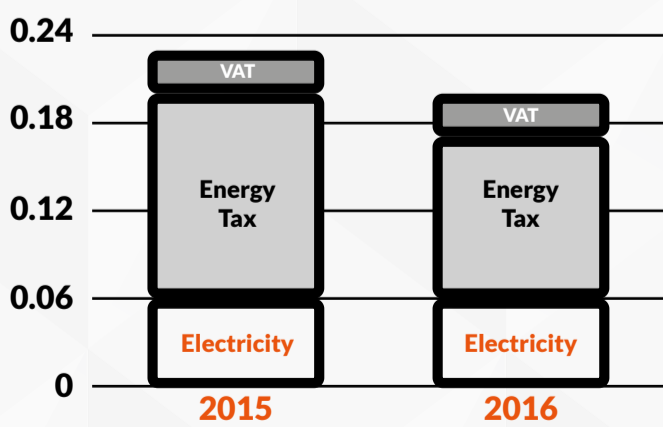
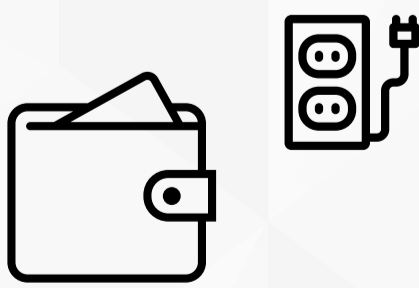


EU Renewables Target

EU renewable target (14% RE usage for every EU country by 2020): NL at 5.5% in 2014, still 8.5% to go



ELECTRICITY PRICES



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Sources: CBS, Klimaatmonitor, Analyst Peter Segaar/PolderPV, SolarPowerEurope, IHS, Tennet, Hieropgewekt, ECN, MilieuCentraal, Fraunhofer ISE

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