

2013-12-05

Welcome to Solar Weekly Insight, presenting the most important developments in the global solar industry, ranging from significant industry trends, policies, research, and new technologies to markets and pricing.

This week's edition focuses on solar policies in Europe and Ontario, Japanese PV demand, and new market developments.

## Quarterly Japanese PV module demand rises above 2 GW, with imports making up more than half



This week the Japan Photovoltaic Energy Association released figures for PV shipments in the nation, finding a 27% sequential increase in PV module demand from July through September 2013 to 2.07 GW. Imported PV met more than half of demand during the quarter. [More](#)

*Picture left: Shipments to utility-scale PV projects, like Kyocera's Kagoshima project, increased more than 10x year-over-year to 747 MW. (Kyocera)*

## EU solar policy: EU Member States approve “price undertaking”, Bulgaria considers 20% PV tax, Spanish court suspends energy reform measure, UK updates PV “strike prices”



This was a big week for European solar policies. First, Member States of the European Union approved the price undertaking agreement over imports of Chinese PV products, as well as approving anti-dumping and anti-subsidy duties on PV products which fall outside of the deal. [More](#)

*Picture left: The deal sets a maximum import level for Chinese PV products*



In Bulgaria, a major threat to the nation's PV industry has emerged in the form of legislation to impose a 20% tax on the output of PV and wind installations. The Bulgarian Photovoltaic Energy Association (BPVA) held a series of rallies to protest the measure, which has been condemned internationally. [More](#)

*Picture left: BPVA notes that over 2,000 companies have invested more than EUR 4 billion in the nation's PV sector*



In Spain, an attempt by the ruling Popular Party to force PV system owners into a system whereby they must sell their power under a competitive bidding system has been suspended by the courts. However, the Spanish government says that it will move ahead. [More](#)

*Picture left: ANPIER says that the ruling has “paralyzed” electricity sector reform*



Meanwhile, the UK has updated solar PV strike prices under its Contracts for Difference mechanism. While the initial prices are lower than the solar industry had asked for, the long-term prices are higher. [More](#)

*Picture left: The Contracts for Difference program will only apply to UK PV plants larger than 5 MW (Lark Energy)*

### Ontario creates new bidding system through long-term plan



Policy news also comes from the Canadian province of Ontario, where the government has released its long-term energy plan. The plan creates a new public bidding system for PV projects larger than 500 kW, part of a plan to deploy 340 MW of PV annually. [More](#)

*Picture left: Ontario plans to procure 140 MW of utility-scale PV through the bidding process both in 2014 and 2015. (Canadian Solar)*

### Soft costs rise to 64% of U.S. residential PV system costs



Meanwhile, in the United States researchers have published a new report which finds that non-hardware “soft costs” rose to 64% of residential PV system costs in the nation, and 57% of commercial system costs. The report also looks deeply into the categories that make up those costs, including a focus on third-party financed systems. [More](#)

*Picture left: The report found that installation labor was the second-largest soft cost at USD 0.55 per watt. (Vivint Solar)*

## Trina Solar to expand capacity through JV



To return to Asia, late last week Trina Solar announced that it would expand its PV module manufacturing capacity through a partnership with Yabang. The partnership will acquire the PV production assets of a Yaban subsidiary and upgrade them, which will allow Trina to gain 500 MW of PV module capacity. [More](#)

*Picture left: Through the JV Trina will expand its PV module production*

## Developing markets: Enel awarded contracts for PV, wind plants in Chile



Also late last week, Enel announced that it had been awarded contracts through a government bidding process for four power plants totaling 161 MW, including two PV projects. As Enel did not disclose more details it is not possible to know the size of the PV projects, but all four will sell electricity in to the nation's Central Grid (SIC) at USD 0.128/kWh. [More](#)

*Picture left: The four projects will supply electricity into the Chile's Central Grid (SIC), which powers most of the nation including Santiago (Victor San Martin)*

## Hanwha SolarOne enters into USD 574 million credit agreement, partners with ZTT to build PV projects in China



This week Hanwha SolarOne made two announcements related to its PV project development business in China. In the first, the company announced a USD 574 million credit agreement with the Bank of Beijing to fund such projects. [More](#)

*Picture left: Draw-downs of the credit will be subject to Bank of Beijing approval*



A few days later, Hanwha SolarOne announced a partnership with ZTT to build PV projects, with a 150 MW PV module supply deal for a distributed generation project in Jiangsu as the first step. [More](#)

*Picture left: The announcement comes only days after Hanwha SolarOne announced a USD 574 million credit agreement with the Bank of Beijing*

Promotion

## 8<sup>th</sup> PV Fab Managers Forum - Roadmap to manufacturing excellence and greater productivity!



The [PV Fab Managers Forum](#) is the most important forum where suppliers and manufacturer meet and discuss current challenges and future requirements. It brings together the whole manufacturing supply chain better and offers such a dense line-up of presentations from industry professionals.

It will address burning issues, crucial success factors shared by the community and point out needs for combined efforts by PV manufacturers, equipment and materials suppliers and academia community.

- Topics:**
- PV Market and Manufacturing Technology Outlook
  - new edition of [International Technology Roadmap for PV \(ITRPV\)](#)
  - Cost Reduction Potentials in Cell and Module Manufacturing
  - Efficiency Increase Potentials in Cell and Module Manufacturing

**Location:** Kerry Hotel, 1388 Huamu Rd, Pudong, Shanghai, China

## African solar: Juwi to build 86 MW PV plant in South Africa



Finally, late last week Juwi announced that it will provide EPC services for an 86 MW PV plant in South Africa's Northern Cape province. The project was awarded through the third round of South Africa's REIPPP process, and is larger than any operational solar plant in the continent. [More](#)

*Picture left: Site of the Mulilo Sonnedix Prieska PV plant (Juwi)*

Thanks for your interest in the Solar Weekly Insight. Stay posted for next week's industry highlights.

**For free subscription, registration and recommendation please visit:** [www.solarserver.com/registration](http://www.solarserver.com/registration)

**Follow Solar Server on twitter like over 4,300 solar stakeholders do:** <http://twitter.com/solarserver>

**Solar Server: The Gateway to Solar Power around the world:** [www.solarserver.com](http://www.solarserver.com).

**Solar Daily Insight: Breaking news at:**  
<http://www.solarserver.com/solar-magazine/solar-news.html>

**Publisher:**

**Heindl Server GmbH**  
Kaiserstraße 137  
D - 72764 Reutlingen

Tel.: +49 (0)7121-69681-30  
Fax: +49 (0)7121-69681-38

Register of corporations-Nr:  
HRB 382398 Handelsregister des Amtsgerichts Stuttgart

CEO / Editor in Chief: Rolf Hug; [rolf.hug@solarserver.de](mailto:rolf.hug@solarserver.de)

**Solarserver North America Representation**  
One Embarcadero Center, Suite 1060  
San Francisco, CA 94111

Toll-Free: + 1 877 SUN 7077  
or +1 877 786 7077  
Fax: +1 415 627 9169

For recommendation / registration please visit  
[www.solarserver.com/registration](http://www.solarserver.com/registration)

***We respect your privacy.*** If you do not like to receive future e-mails from us, please opt-out by sending an e-mail with re "no newsletter" to: [info@solarserver.de](mailto:info@solarserver.de)