



ROUNDTABLE DISCUSSION ON SOLAR OPPORTUNITIES IN THE NETHERLANDS

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PÖYRY IN BRIEF

Pöyry is an international consulting and engineering company. Our vision is to be the most recommended advisor for the energy transition



ENERGY

Thermal Power & Renewable Energy
Hydro, Transmission & Distribution,
Nuclear Energy



INDUSTRY

Forest Industry
Chemicals & Biorefining
Mining & Metals



INFRASTRUCTURE

Transportation
Water
Environment

Ranked

#6

in power generation in the world
(Source ENR 2016)

Ranked

#1

in pulp & paper in the world
(Source ENR 2016)

More than

1,000km

of transportation tunnels in
the last decades

90%

of key utilities and investors
in Europe ask for our regular advice

Delivered projects for

90%

of the World's major pulp & paper
companies

Conducted

2,000+

environmental due diligences in
the last decade



10,000

projects delivered p/a
across ~ 100 countries



5,500

experts across
70 nationalities



130

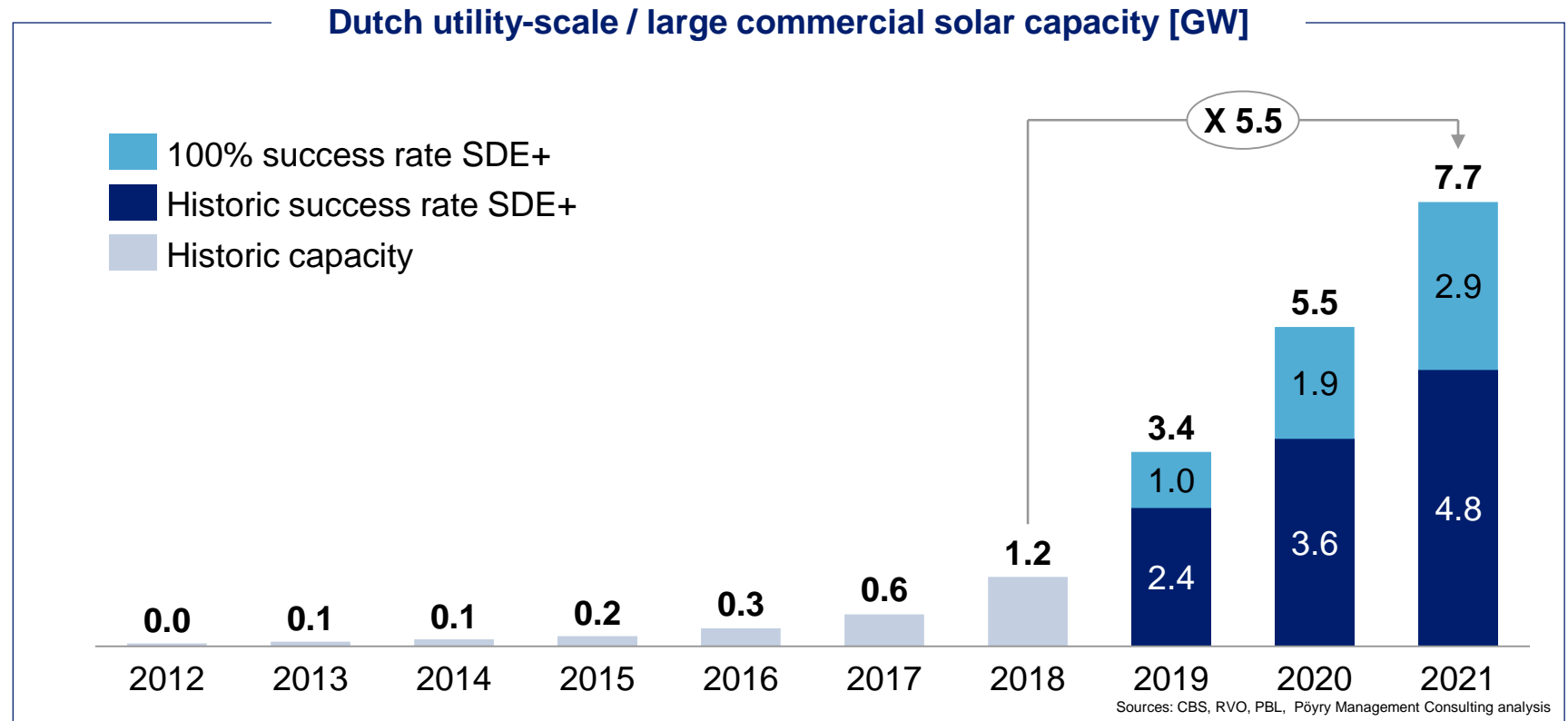
offices in 40 countries



~60

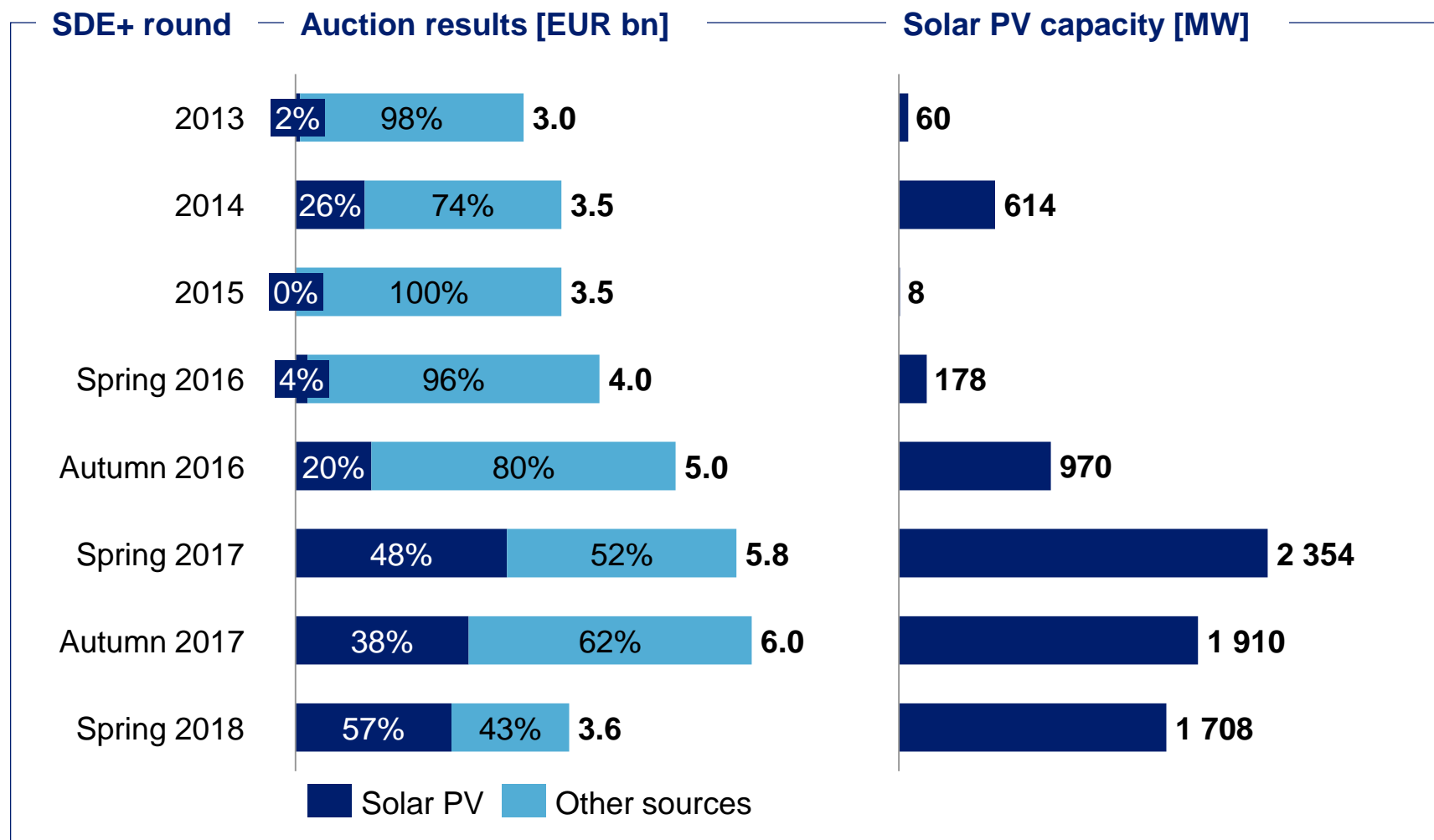
years

DUTCH SOLAR PV CAPACITY IS EXPECTED TO INCREASE MORE THAN 5-FOLD IN THE NEXT THREE YEARS

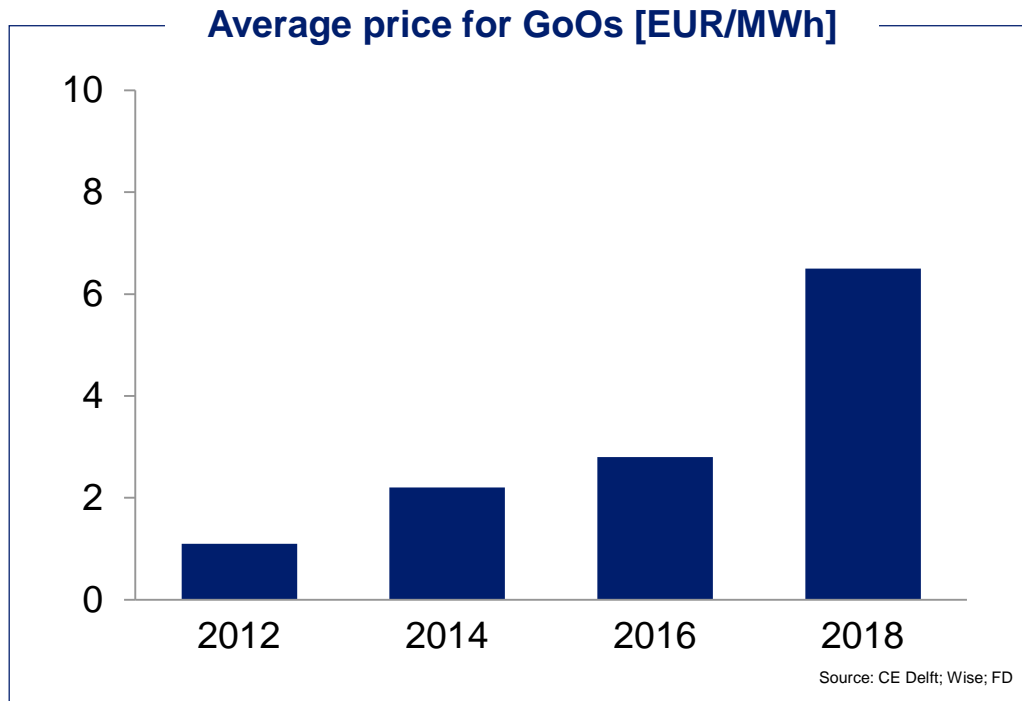


Around 6.5GW of capacity is in various developmental stages, not all of which will be built

SINCE AUTUMN 2016 SOLAR PV HAS OBTAINED FUNDING IN THE SDE+ AUCTIONS, ENABLING THIS GROWTH



SOLAR PV ALSO BENEFITS FROM THE HIGH PRICES FOR GoOS (GUARANTEES OF ORIGIN)



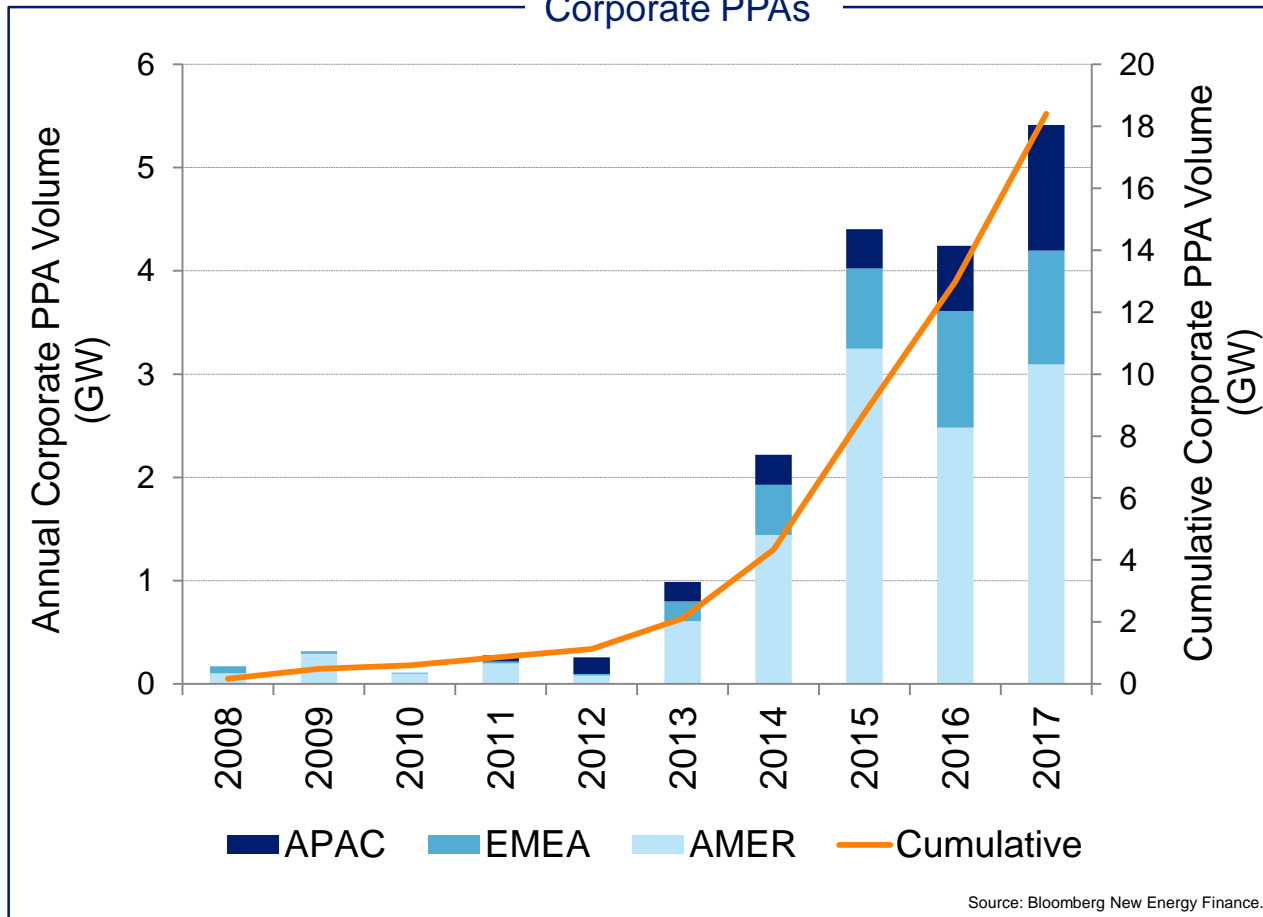
- The value of GoOs has significantly increased since 2016, prices have been quoted between **EUR 5-10 / MWh**
- The Netherlands is implementing a system of full disclosure, which could further increase demand for local green GoOs
- Demand for local green electricity high, also due to municipalities wanting local energy
- The market remains dependent on public willingness to buy local green energy, and the market is not transparent or liquid. It relies for a large deal on PPAs



The Netherlands **produced 12.4TWh** of renewable electricity, compared to a renewable electricity **demand of 48.6TWh** (2016), driving up the value of local renewables

COMPANIES BASED IN THE NETHERLANDS ARE STARTING TO BUY DUTCH SOLAR PV

Corporate PPAs



Google signs 10 year PPA with Netherlands' largest solar farm (10-Jul-'17)



Vattenfall/Nuon signs 3 PPAs for 38 MW of PV in the Netherlands (16-Feb-'18)



Friesland Campina buys solar-GoOs from hundreds of members (21-Aug-'17)





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