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Looking for dialogue. During the panel discussion on the current state of the PV market, the exhibitors did not shrink back from critical comments on the part of the audience. However, these comments did not reach the politicians that were conspicuous by their absence.



Italian, including, however, also subsidiaries from international players. The Italian newcomers at PV Rome Mediterranean 2008 were confident to grow with the solar energy market.

However, according to the report "The Italian Photovoltaic Market 2008, Overcoming Obstacles" published by market research company EuPD Research from Bonn, Germany, the domestic module manufacturers had until May

2008 delivered only 13 % of the total installed PV capacity in Italy. As became clear during the exhibition, the production capacities of the new manufacturers currently arrive at volumes between 10 MW and 20 MW maximum. Other than many international players, a lot of the Italian manufacturers have entered the market rather late. Opportunities are still good as many domestic manufacturers are active in both, retailing and project planning, and bring in their pre-

vious experience with the licensing procedures.

In particular, the stands of newcomers such as Convert Italia SpA, DG Energy Srl and AV-Project Srl enjoyed high popularity. Oliviero Armezzani, from Business Development at Convert Italia SpA with seat in Rome, took the opportunity to introduce his company to the visitors: "We have been active in the telecommunications and electronics sector since the early 1980s. In 2005, we made our entry in the PV market and have since been retailing and planning PV open space and on roof systems on commercial buildings." Convert Italia has targeted a total volume of 3.5 MW for 2008 and for the next year a capacity of 20 MW has already been commissioned, said Oliviero Armezzani. The group that continues its traditional lines of business presently has a workforce of about 70 employees. At the time of the exhibition, Convert Italia's portfolio included for the first time also manufacturing: "Our tracking solution MX1 is manufactured in the region of Rome", said Armezzani. The tracker has until now been installed in three open space systems. Another 1.2 MW plant has been partially connected and two more are still under construction.

Besides conglomerates such as Convert Italia, the exhibition also attracted newcomers with focus on module manufacturing. One was DG Energy Srl from Calabria whose owners Francesco Donnis and Luigi Gazzaruso are already familiar with the difficult situation for doing business in Southern Italy. "The fact that



With their company DG Energy, Gerardo Capilupo and Luigi Gazzaruso entered the module manufacturing segment in the southern region of Calabria: "This has been almost a small miracle!"



Gianni Chianetta, President of Assosolare, saw no reason to be reserved: Impediments in the licensing of PV plants are often related to the regional governments. Chianetta pointed to a number of disillusioning examples.

we were able to start up a company at the most southern tip of the Italian boot is a small miracle. Without strong will and equity it is a thing almost impossible to do", said Luigi Gazzaruso. With a current staff of 20 employees, the two entrepreneurs were able put together a mid-sized company in a region where high unemployment rates are part of everyday life. Donnisi and Gazzaruso started their careers in the construction sector. When it comes to reselling the company's poly crystalline modules, the two businessmen trust in the experience of CEO Gerardo Capiluppo. The DG6M48 modules come in sizes of 170 to 185 Watts. The high performance module DG6M54 is sold with outputs between 190 and 210 Watts. Donnisi and Gazzaruso in 2008 want to sell a capacity of 3 MW. But also AV Project Srl from Avellino near Naples launched a new module production this year. "We are ambitious about the economic potentials of solar energy production in Southern Italy", said Katia Solomita of the Marketing Division. The company also entered the market from building construction where parent company Gruppo AV has been an experienced player. The company retrieves its solar cells from different manufacturers, among them Gintech Corp. from Taiwan. "However, we are also in touch with Italian cell manufacturers", added Solomita. In 2008, the production capacity of AV Project will be at around 10 MW. In 2009, that volume will be raised to 25 MW.

Italy's solar industry only gradually scaling up

The presence of newcomers at PV Rome Mediterranean 2008 shows that Italy has become an attractive ground for module manufacturers. According to EuPD Research, 22 module manufacturers had been active at mid-year. Experts believe that the market is meanwhile shared by up to 30 manufacturers.

Some of the companies that have been active in the construction sector are also experi-

The team around module manufacturer Renegies Italia S.r.l. held an ambitious attitude towards their competitors. "We are looking forward to meeting challenging and serious new competitors", said CEO Alberto Volonté (second from left).



enced in the field of energy efficient building construction. Other manufacturers have previously been active in the electronics sector or in system retailing. These companies not only build on an existing infrastructure but also on their previous business contacts when floating their products.

That way the solar sector is becoming increasingly important for the national economy. Gianni Chianetta, President of Associazione dell'Industria Solare Fotovoltaica (Assosolare) – one of two PV associations in Italy – sees good opportunities for the sector: "Any future government will have to deal with the weight of the solar energy market. Strategies to downgrade renewables will not only create distrust in the public but also strong resentment in the industry." Gert Gremes, President of the other PV association, Gruppo Imprese Fotovoltaiche Italiane (GIFI), believes that about 150 companies are currently active on the market. But the start-up conditions for newcomers are hardly always perfect. Not many companies have so far been able to profit from the incentive "Industria 2015" through which the first investment grants became available in 2007. The programme envisages energy efficiency measures in the range of € 200 million and explicitly encourages the collaboration between economy and science in the PV industry. Former Minister of Environment Alfonso Pecoraro Scanio emphasised the important role that the commitment of the industry members plays: "I hope that the individual companies will not wait for incentives to pop up but rather bring in own initiative." In most cases, the seed capital for starting up businesses comes from activities in other sectors such as building construction. This is literally the only way to enter the highly specialised and rapidly growing sector. "Many companies are in a process of industrial restructuring while they enter the market, which often leaves not enough time for orientation", said