

ANNUAL REPORT

2023/2024



REPORT PREAMBLE

The Annual Report of the South African Photovoltaic Industry Association (SAPVIA) is a comprehensive review detailing activities of the 2023/24 financial year. The purpose of this report is to provide SAPVIA's stakeholders with an overview of the Association's operations and financial performance over this period while communicating successes, challenges, and opportunities. We are committed to being transparent and accountable to our members and stakeholders and with this report we aim to share valuable insights into SAPVIA's strategy and goals; highlight all major projects and initiatives that the Association has undertaken over the past year; provide valuable information on the Association's services, members, and market position while also providing a sense of the its financial health.





CHAIRPERSON'S REPORT

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The energy crisis in South Africa presents one of the greatest existential challenges facing the nation and region today. The crisis also presents an opportunity for South Africa to leapfrog some of its legacy structural challenges through adoption of new technologies to address energy security cost and carbon impact. Resolving the energy deficit could also address the chronic unemployment challenges the country faces. Efforts to open up the energy sector and crowding private sector capital is beginning to bear fruit. Recent developments to further liberalise the regulatory framework including opening up wheeling and introducing tax incentives will accelerate adoption of alternative energy solutions. New technologies for energy storage and efficiencies have been a key enabler for solar adoption in the country and catalyst for a just transition programme. Eskom is also embracing innovation, albeit it at a snail's pace. There is no transition without transmission.

Load shedding has been devastating for South Africa's economy, weakening the Rand and contributing to inflation. South Africa's central bank estimates that load shedding has cut 2% from the country's economic growth rate this year. In April 2023, some 80% of public healthcare facilities said they were now affected by power cuts. We have seen how the changes to regulations have had an incredible positive impact on the C&I space, opening the renewable energy (solar) market. It has changed lives and actively contributed to the improvement of the GDP through rooftop, ground mounted, and utility-scale installations.

Rooftop solar capacity has increased by 349% in a little over a year in South Africa

Cumulative rooftop solar connected to the South Africa grid (MW)

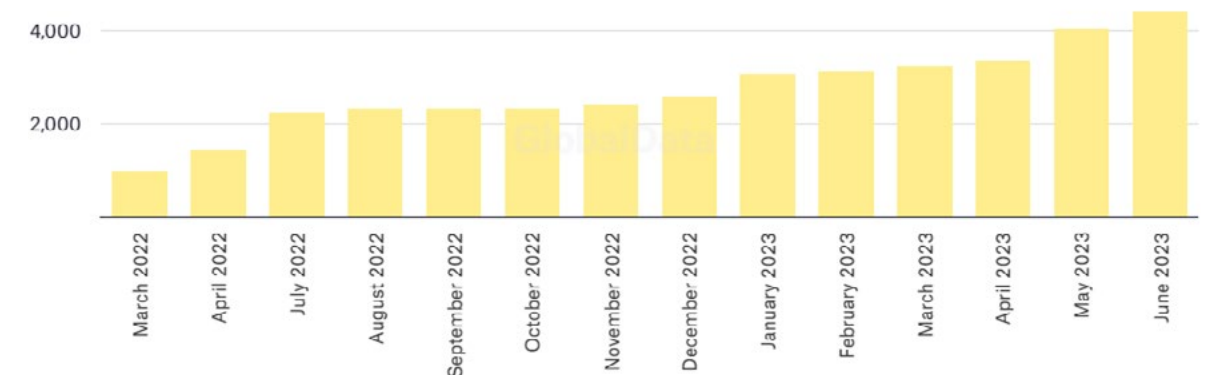


Figure 1: Increase in rooftop solar capacity in South Africa – Source (Eskom/Anton Eberhard)

Households and businesses are adopting alternative sources of energy as load shedding intensifies. What may not be known is that many municipalities are in the game too, providing off-grid energy sources to the poorest households.

Eskom is expected to increase its tariffs by an average of 18.65% as of 1 April 2023. The heavily indebted power group had requested an increase in tariffs of over 32%, citing higher fuel costs, higher procurement from independent power producers (IPPs) and depreciation of its power generation assets. This exacerbates the impact on South African citizens. Therefore, deployment of solar to homes, offices, factories and hospitals is now key to mitigate escalating energy costs. Solar PV prices have dropped from 28 US cents per watt to 11 US cents per watt in the past 18 months, thereby effectively rendering solar as the cheapest form of energy for South Africa.

We applaud the government's concerted effort to finding a lasting solution to the energy crisis. Under-investment in the energy infrastructure dates back to more than 30 years and there are no quick fixes, especially for the issues of energy generation. The appointment of a dedicated Minister of Electricity affirms government's commitment to resolving the crisis. Additionally, government has extended national Solar Tax Incentives for Individuals and substantially expanded tax rebates and other benefits for businesses. Under the expanded incentive structure, businesses will be able to claim a 125% deduction in the first year for all renewable energy projects with no thresholds on generation capacity. The adjusted incentive will only be available for investments brought into use for the first time between 1 March 2023 and 28 February 2025.

Unfortunately, the tax incentive for individuals who install rooftop solar panels contained in Budget 2023 was relatively modest. That said, government incentives that offset initial investments and reduce solar payback periods should be welcomed under any circumstances.

It is very clear that amid a crisis opportunities arise in a myriad of ways. SAPVIA members continue to capitalise on the opportunities, ensuring that they play a role in mitigating the energy crisis – a source of immense pride for myself personally, and for SAPVIA as an institution..

Additional opportunities have arisen because of the opening of the energy market, and we are pleased to note the increase in the number of energy traders being awarded NERSA licences. This raises hopes for the overall renewable energy market and continues to open doors for conversations around carbon footprints, renewable energy technology, and sustainability.

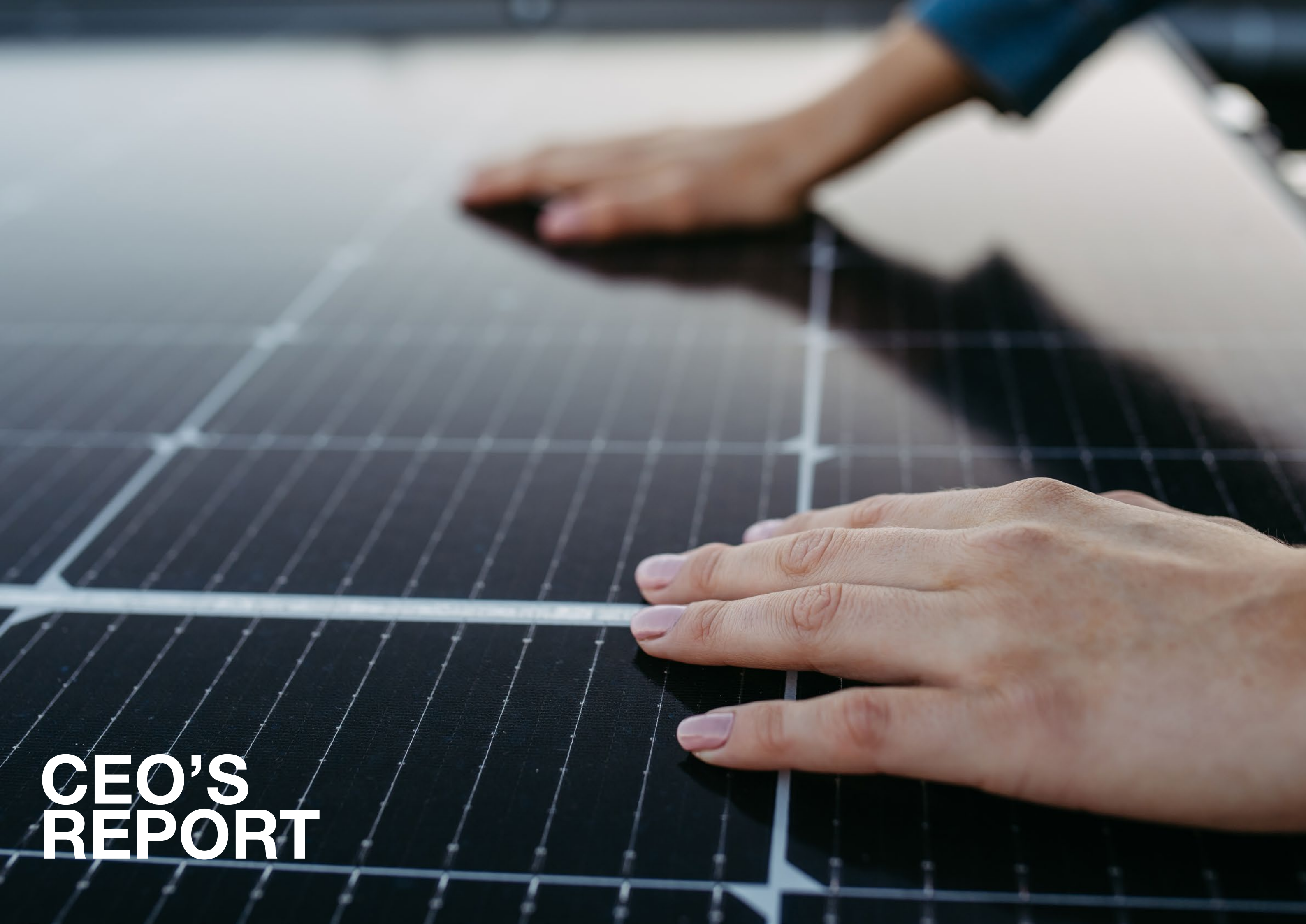
Our resilient members continue to diligently drive the narrative to ensure solar energy takes its rightful place within the market of South Africa. This dynamic industry is one that I am incredibly proud to be part of and it is heartening to see how our members have adapted and evolved as they seek to capitalise on the opportunities available.

One clear example of this is in the growth of the PV Green Card programme, where membership has increased rapidly, in a reflection of the increased interest and appetite across the nation to adopt solar PV as an alternative to traditional f energy sources.

It is a testament to the team that this programme, designed to instil best practice and quality standards, is going from strength to strength.

I'm delighted to have worked with the board and teams at large during this period in fostering and steering the solar narrative across South Africa and I continue to be encouraged by the vast strides that SAPVIA members are making.





CEO'S REPORT

CEO'S REPORT



Reflecting on all that we've achieved fills me with sense of optimism. Whilst I have been at the helm of SAPVIA for just over two years, I am standing on a solid foundation that was established over 10 years ago. It is befitting to celebrate 10 years of SAPVIA, honouring its founding members, current members, our local and international partners, and those who embarked on this journey from the outset, and the challenging early period. In the past year, I have deliberately focused on building closer relationships with our members and partners, as strong connections are the cornerstone of a formidable organisation.

SECTOR AND MEMBERSHIP GROWTH

We are living in historical times, in the past year, the solar PV sector in South Africa has grown exponentially. We estimate that that rooftop solar additions ranged between 2 to 3 GW in 2023, while globally, installations are expected to top 520 GW this year. South Africa is projected to become the 10th largest solar PV market globally.

In times of unprecedented growth positioning ourselves as thought leaders is paramount to protecting the sector's credibility, and to ensuring that the role it plays is well-understood. This expansion is mirrored by membership growth at SAPVIA. Our goal is to retain our long-standing and trusted members as we increase our footprint across the entire solar PV value chain.

DATA AND THOUGHT LEADERSHIP EFFORTS

One of our notable achievements has been our ability to gather and analyse data that benefits our members and the industry. For example, we launched a data portal that captures installed capacity with data up to the first quarter of 2023, using satellite imagery and machine learning to accurately represent installed capacity across the country. In our view data is invaluable. It points to where future growth opportunities lie, and is a cornerstone for informed decision-making, whether for corporates or our banking members. Data aids our members in understanding market opportunities, helps municipalities in infrastructure planning, and equips corporates with information about deployment potential for solar PV. We commit to continuously providing such insights to our members.

As thought leaders, we play an immensely important role, especially in clarifying misconceptions surrounding solar PV. We aim to be a rational voice demonstrating the benefits of solar PV across various market segments. This became particularly evident as we addressed how solar PV can provide energy security - not only at a national level but for the individual households and businesses bearing the brunt of load shedding. With declining costs of solar PV (and financial solutions available), it has become a viable option for energy needs across the board. Aligning with technologies like solar PV is essential for a sustainable energy future, and it was key for us to convey that message as thought leaders. As such we have worked hard to communicate this across different platforms. In the past year, we were featured in hundreds of print, broadcast, and digital media publications, as well as on social media channels.

We continue to gather data to bolster SAPVIA's standing in the industry. In the past couple of months, we have yet again embarked on a survey alongside Eskom and SAWEA to measure the industry for the pipeline of projects. Thanks to our efforts, this intelligence has become a respected resource within the sector - transforming raw data into a format that's easily comprehensible and useful for our members, partners, and the broader sector. We use our data and influence to inform government stakeholders and to quantify the need for policies and instruments that can increase the roll-out of solar PV to wider income brackets, including for marginalised groups.

RESEARCH AND POLICY ADVOCACY

We believe that policy development needs to be underpinned by credible research. It is for this purpose that we collaborated with our European counterparts to further unpack a localisation roadmap, identifying investment opportunities for South Africa's solar PV manufacturing imperatives.

In the same light, we are acutely aware that with the rapid deployment of solar, a secondary market is likely to emerge; one that will be crucial for reusing components that are no longer fit for commercial use but still fully operational and effective. They could still serve purposes in other markets. Our goal is

not only to ensure compliance with EPR regulations but also to explore second-use opportunities and develop a comprehensive strategy for waste management. Together with SPE, we have developed a concept, and plan to embark on a comprehensive study that will inform policy and devise best practices around the end-of-life management of waste from discarded solar PV components.

QUALITY AND SAFETY INSTALLATIONS

Eight years on, we remain committed to addressing the quality and safety of installations, especially in the residential market where our PV Green Card initiative plays a vital role. Our aim is to build trust with end-users, banking members and insurance partners. We’ve tightened our compliance checks and controls, ensuring that every installation by PVGC-approved companies adheres strictly to the regulations, which are now robustly enforced. It aims to apply the same standards of safety and quality across all installations, regardless of the setting. With the support of our Sponsor member Absa, we’ve also invested in digital infrastructure, making it easier for customers to find accredited installers and for us to track and manage new installations.

Research that informs policy remains a priority for us, as such we have partnered with international partners Solar Power Europe to ensure alignment with international best practices, as well as to take learnings from other countries.

We are acutely aware of the importance of managing solar module waste and other components when they reach the end of their life. We’re actively encouraging our members to comply with the Extended Producer Responsibility (EPR) regulations that were introduced a few years back. This involves a commitment to the sustainable management of component waste, an area we are prioritising. We are also in discussions with Solar Power Europe, our European counterpart, to develop best practices for managing solar PV waste, which we aim to publish in this current financial year.

LOOKING AHEAD:

Over the next year, our focus will be on advocating for more widespread deployment of solar PV, accruing more economic benefits to the sector, and reinforcing the implementation of the South African Renewable Energy Master Plan. Localisation and manufacturing of components will be key for economic growth and job creation. Additionally, we want to roll out more skills development initiatives and expand our membership to include energy users, not just producers and service providers. We also plan to demystify power purchase agreements for potential energy off-takers and work with relevant stakeholders to unlock grid access, particularly in resource-rich areas.

TEAM AND FINANCIAL HEALTH

Lastly, but certainly not least, all these efforts and work would not have been possible without the support of a strong, knowledgeable team - the backbone of any successful organisation. We have been building a team versed in all aspects of the industry, from technical to finance, residential to commercial. With capable people, we can provide better services to our members, be more agile in our operations, and engage more closely with members, which is vital for our advancement. I am also grateful for the support and the guidance of SAPVIA's governing committee, our trusted partners and stakeholders. We remain in good financial health and are well-gearred to grow and diversify our revenue stream in the coming year.





SAPVIA OVERVIEW

The South African Photovoltaic Industry Association (SAPVIA) is a non-profit industry association formally registered in 2013 to promote, develop and grow the solar Photovoltaic (“PV”) industry as part of the wider renewable energy sector in South Africa. As the voice of solar PV in South Africa, SAPVIA provides market and legislative interventions and programmes across market segments, i.e., in the utility, industrial, commercial and domestic markets.

SAPVIA represents the needs of almost 800 members who operate across South Africa’s solar Photovoltaic value chain. A core objective of SAPVIA is to increase the deployment of Solar PV technology in South Africa. In partnership with government departments, development agencies, and some of the world’s leading players in the PV sector, SAPVIA is committed to promoting the growth of this country’s Solar PV electricity market. The end goal is to provide access to viable, clean, and affordable energy to all citizens.

OUR VISION

Our vision is for solar PV to be a significant and reliable contributor to the energy mix of South Africa. By the year 2035, there is:

- Energy Security, where we use solar PV as a renewable daily resource.
- Policy and Market Alignment, where clear laws and policies complement one another, and public-private partnerships enable the growth of the solar market.
- Environmental & Market Sustainability through decarbonised energy and social impact awareness.

OUR MISSION

Our mission provides us with the route to realising our vision. We know that we are building towards our vision when we make choices that amplify our efforts in the below mission-building pillars. These pillars will form the bedrock of how we decide what to do.

As the voice of the solar PV industry in South Africa, SAPVIA’s mission is to support and represent our members. We:

- Shape and influence regulations and policy development
- Inform and educate members and other stakeholders
- Facilitate partnerships and collaboration
- Promote higher usage of solar PV in the public & private sector

Through our support, our members:

- Deploy and invest in quality solar PV
- Facilitate greater accessibility and affordability of solar PV
- Create jobs, economic opportunities and develop skills

OUR VALUES:

COHESION:

We embrace diversity.

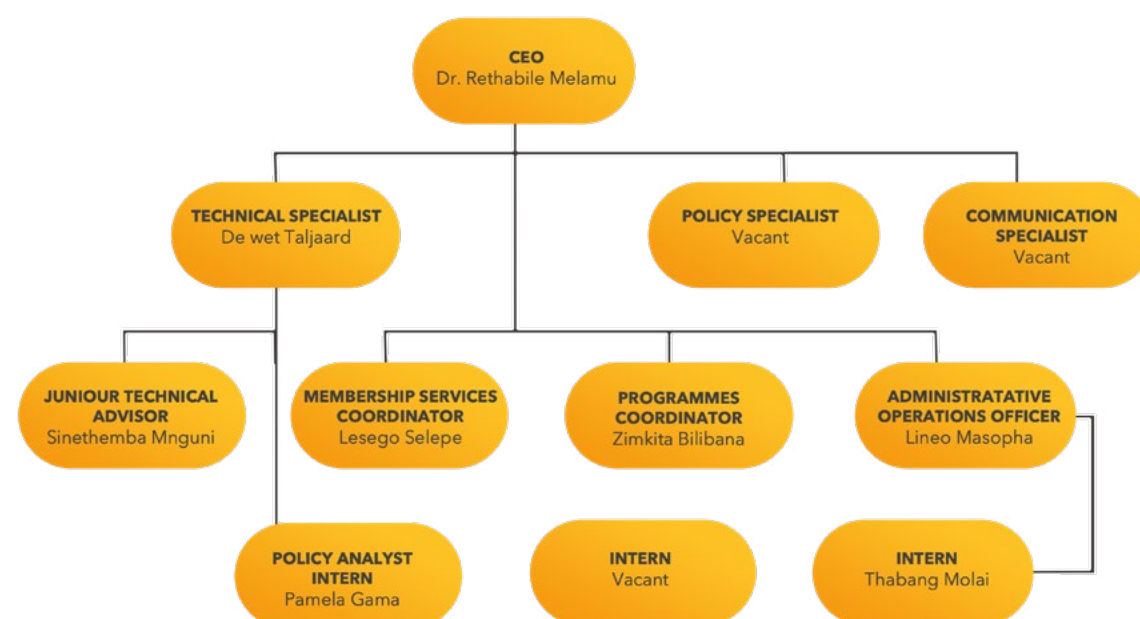
CONSISTENCY:

We say what we mean, and we do what we say.

COLLABORATION:

We don’t walk fast on our own. We walk with our stakeholders, so we can walk further, together.

ORGANISATIONAL STRUCTURE



SAPVIA GOVERNING COMMITTEE

SAPVIA is governed by a board of ten Commissioners, one of who is elected as a Chairperson elected democratically on an annual basis by its members at the Annual General Meeting. All appointments align with our Constitution. The Governing Committee shall from one of their number elect the Chairperson, Vice-Chairperson, Treasurer, and Spokesperson.

Composition by: Gender – 7 Males, 3 Females

Changes to the Committee:

Below is information on Committee members who resigned during the reporting period and those who were appointed during the period:

- Ms Lena Chirwa (Enel Green Power) resigned on 09th June 2023
- Ms Avra Moodley (Mulilo) was appointed to the Committee during a Special Meeting held on 30 August 2023.

MANAGEMENT COMMITTEE MEMBERS



NORMAN MOYO

Chairperson

Norman is currently the Group CEO of Distributed Power Africa, a pan African renewable energy and technology group. Having begun his career journey at Standard Chartered Bank, he moved into the Telecommunications industry when GSM Technology was introduced in Africa

PHEMELO MITCHELL

Deputy Chairperson

Phemelo Mitchell is the Chief Operations Officer at SunElex Group (Pty) LTD. Phemelo has extensive experience in the energy sector as an Engineering Professional in the fields of Project Management, Engineering Procurement and Construction, with additional experience in the manufacturing sector.



MELISSA HILL

Treasurer

Melissa Hill stands at the forefront of driving sustainable change within the renewable energy sector. With an impressive career that spans over a decade, Melissa has dedicated her professional life to advancing renewable energy projects (utility-scale wind and solar PV).

MALOBA TSHEHLA

Spokesperson

Maloba, a loudly proud Mosotho, is the Head of Strategy and Growth at ED Platform. He is responsible for managing inter-team collaborations to improve the business' value offering and efficiency, as well as driving strategy to ensure successful growth in current and new markets. Maloba is also charged with fostering innovation across the company's units, as well as ensuring optimal team performance.





JONATHAN FRICK

Deputy Treasurer

Jon Frick is a Business Development Director at Globeleq where he has been leading the renewables team in securing new wind and solar projects in Southern Africa for seven years. Jon has led teams in competitive bids in eight countries and has overseen the successful award of 1.5GW through competitive processes. Globeleq's partnership and acquisition approach requires Jon to forge and maintain industry-wide relationships



MTHO XULU

Commissioner

Mtho Xulu is the Group CEO of Nashua Mpumalanga Group, the largest Mpumalanga based ICT company. Since inception, Nashua has evolved to offer more solutions, more services and more innovative technology; but one thing will always remain constant – a commitment to live our iconic tagline every single day: "Saving you time. Saving you money. Putting you first."

FRANK SPENCER

Deputy Spokesperson

Frank, with an MSc in Engineering and a BPhil in Sustainable Development, is an engineer by background with 20 years' experience in the solar industry. He was instrumental in the installation of some of the first on-grid and off-grid solar PV projects in Southern Africa. In addition he has founded a local C&I solar PV business, and has been actively involved with SAPVIA since its inception. He is well known in the industry for being an ethical and passionate supporter of renewables.



AVRA MOODLEY

Commissioner

Avra Moodley is a lawyer with experience in both the public and the private sectors in energy, infrastructure, procurement, banking/finance, corporate and commercial law since 2002. Following completion of her law degree, she served her articles at Bowmans in Johannesburg. Her career included in-house legal counsel for Absa Bank, Legal Manager at Primedia (Ster-Kinekor), specialist Legal Advisor at the IPP Office, energy advisor to the National Treasury Cities Support Programme



DEVILLIERS BOTHA

Deputy Spokesperson

DeVilliers Botha, co-founder and COO of Solareff, and Management Committee member of SAPVIA since 2021. As former member of the Johannesburg Bar, DeVilliers uses his extensive experience as a practising Advocate and a Solar industry participant for 13 years, to add value to the industry by actively driving for sensible, enabling, and inclusive regulations.



KHOTSO SELOKOMA

Commissioner

Khotso is responsible for building and maintaining positive relationships between SOLA and its various stakeholders, such as Energy Regulators, Municipalities, JV partners, Government, and the community. His role is to act as a bridge between SOLA and the communities it operates in, responsible for building and maintaining positive relationships with community members, local organizations, and other stakeholders. He has a strong Local government and community engagement, public relations, and communication background.



**OUR
STRATEGY**

OUR STRATEGY

SOLAR PV FUTURE: OUR TARGETS FOR 2035

ENERGY SECURITY

- There is no load shedding or power outages.
- Solar PV contributes over 40% to the energy mix.
- There is sufficient electricity supply.
- Solar PV is an enabler of economic growth.

POLICY & MARKET ALIGNMENT

- There are clear laws and policies in place, that complement one another and enable the growth of the market.
- Policies are understood, and can be engaged in by all stakeholders, including industries.
- Policies are positively implemented.
- Successful PPP.

ACCESSIBILITY & AFFORDABILITY

- There are innovative financing solutions for all consumers to access solar PV.
- Fit-for-purpose technology is available for all consumers to adopt solar PV.
- There is accessible and affordable infrastructure that enables solar generation and use.
- There is a new solar finance regime that enables public procurement.

SUSTAINABILITY

- There is a decentralised energy industry/market.
- South Africa is meeting and exceeding the NDC.
- Air pollution is reduced.
- We transition from fossil-fuel based livelihoods to renewable energy-based ones.
- We identify and build skills required for the future of solar energy generation and supply.

QUALITY & SAFETY

- Solar PV is a safe, reliable, dependable source of electricity supply.
- Standards and regulations that allow for easy access and installation of mass installation.

Our 2023/24 strategy was centred around amplifying member value. We aimed to:

- Place our members at the centre of our current concerns.
- Clarify the value of our membership fees both in philosophy and practice.
- Ensure that our mission is evidenced through our members.
- Create an enabling environment for our members to compete successfully in the marketplace.
- Do all the work required to advance their interests and market impact.

STRATEGIC FOCUS AREAS FOR 2023/24:

STRATEGIC FOCUS AREAS FOR 2023/24:	THEMATIC STRATEGIC FOCUS
SF1 - Shape and Influence Regulations and Policy	Advocating & Lobbying
SF2 - Inform and Educate Members and Other Stakeholders	Research & Publications
SF3 - Facilitate Partnerships and Collaborations	Clue Up on Glue Up
SF4 - Promote Higher Usage of Solar PV in Private and Public Sector	Market Visibility

STRATEGIC TARGETS (SHORT & MEDIUM TERM)

	SHORT TERM	MEDIUM TERM
Strategic Focus	Milestone checkpointt 1: 2026	Focus Milestone checkpointt 2: 2030
SF1	Lobby for updated IRP & IEP Advocate for national wheel framework Advocate for municipalities to allow SSEG SANS 10142 – infinity sign Drive authority of PV GreenCard Drive financial sustainability of PV GreenCard Drive PC and storage localisation Implement off-sector codes and charters Drive inclusion in the sector	Fully liberated energy market Support, input, and drive for amended ERA to unlock liberalised energy market Municipalities are F.I.T (fit for purpose) Have established local PV module recycling/end of life
SF2	Research and data collection about members Alternate revenue stream from market intelligence reports Annual solar PV reports SAPVIA converts to a data portal/database of all relevant industry information	Outreach programme – internships Repository of policy and regulation tracker
SF3	Have a stakeholder engagement monitoring framework Have a clear needs-addressing goal/analysis that aligns to the needs Establish credible and structured platforms for engagement	SAPVIA is a proactive and pre-emptive sought after collaborator in the market There is continuity of relationships and projects People agnostic – both internally and externally Profiles of members are distinguished and differentiated
SF4	All installers have a PV Green Card All installations are safe and installed to standard There exist various platforms for collaboration and communication	Government and IPPO are aligned with IPPs Communication is transparent, high degree of cooperation and quality information available about grid, regulations etc Transparent Eskom No loadsheddingload shedding, sufficient access to electricity nationally Clear policies on REIPP versus private Queuing rules in place and they're effective

THE YEAR IN REVIEW

PERFORMANCE HIGHLIGHTS	2023/24
Revenue (audited)	
Members (including PV GreenCard)	783
Sponsor Members	6
PV GreenCard trained individuals	1378
PV GreenCard assessed individuals	117
PV GreenCard approved training centres	18
PV GreenCard approved assessment centres	14
Press Releases Issued	21

OTHER HIGHLIGHTS

- Launch of the Solar PV Installed Capacity Data Dashboard.
- Together with EWSETA, we provided 20 individuals a grant opportunity to pursue a Solar PV Installation course.
- Launch of the new PV GreenCard website.





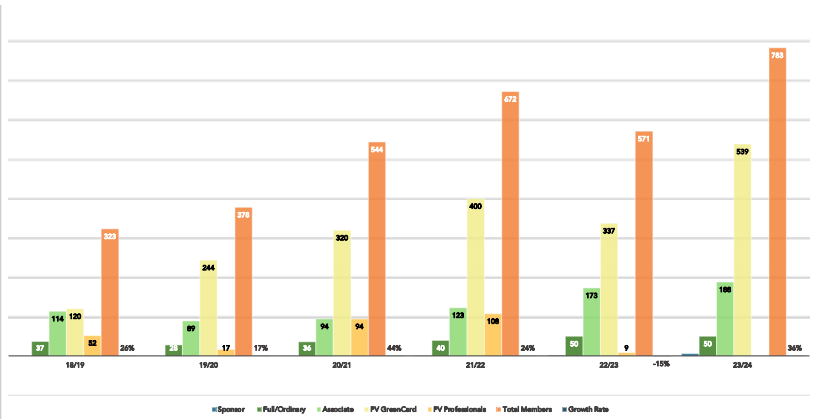
OPERATIONS REPORT

MEMBERSHIP

SAPVIA experienced a significant membership growth from 581 members in the 2022/23 financial year to 783 members in the financial year ending 31st March 2024. Several factors contributed to this notable increase, reflecting both internal and external dynamics within the organisation and the broader industry.

REASONS FOR THE GROWTH:

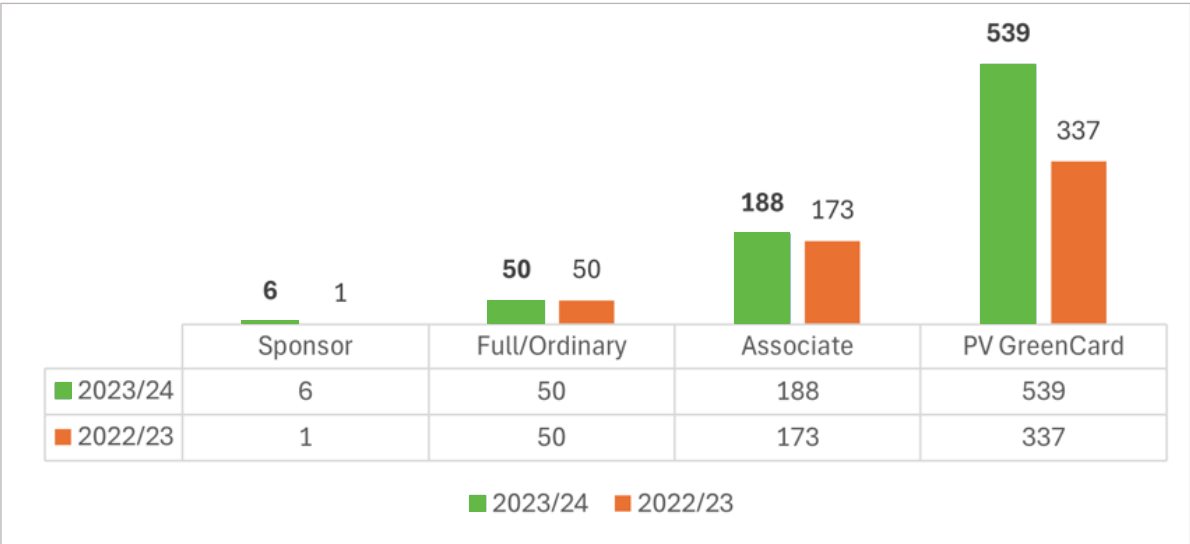
- **Increased Awareness and Adoption of Solar Energy:** Growing awareness of the benefits of solar energy among individuals, businesses, and policymakers has led to a surge in demand for solar solutions. This heightened interest prompted many stakeholders to join the Association to stay informed and connected within the industry.
- **Policy Support and Regulatory Environment:** Favourable government policies and regulatory frameworks supporting renewable energy, including solar, have provided a conducive environment for industry growth. Members joined the association to leverage its advocacy efforts in shaping and influencing policies that impact the solar sector.
- **Networking and Collaboration Opportunities:** SAPVIA offered valuable networking platforms, events, and collaboration opportunities for stakeholders across the solar value chain. Members have been attracted to the prospect of connecting with peers, sharing knowledge, and exploring potential partnerships to drive business growth and innovation
- **Industry Growth and Market Expansion:** The solar industry in South Africa has experienced overall growth during the 2023/24 financial year, driven by factors such as higher stages of load shedding, declining costs of solar technology and expanding market opportunities.



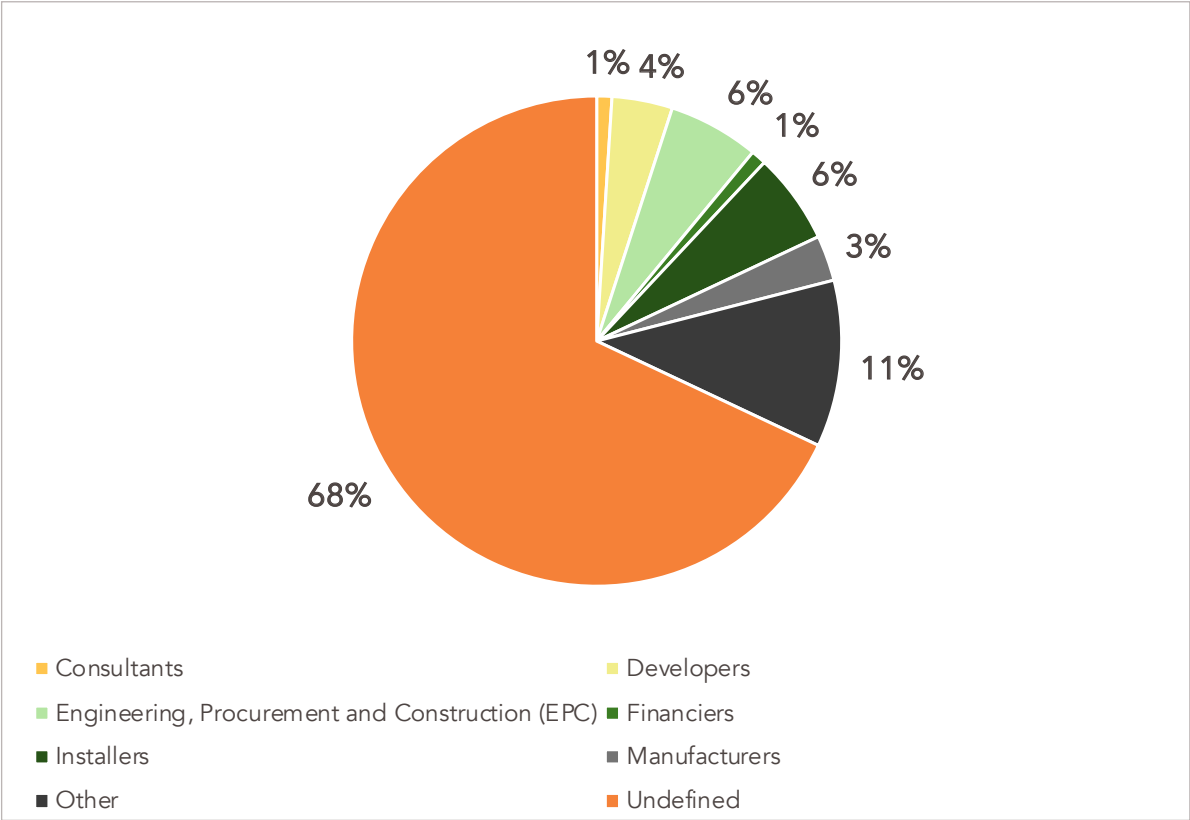
In conclusion, SAPVIA's membership growth of 36% reflects the broader trends and dynamics shaping the solar energy landscape in the country.

Membership Growth Chart

OUR MEMBERS:



OUR MEMBERSHIP BREAKDOWN ACROSS THE SOLAR PV VALUE CHAIN:



- **Consultants:** Consultants play a vital role in providing expert advice, market analysis, and strategic planning for solar projects. Their expertise is crucial for guiding decision-making processes and ensuring project success.
- **Developers:** Developers are responsible for identifying, planning, and executing solar energy projects. Their involvement is essential for driving project development, securing financing, and navigating regulatory requirements. Developers play a pivotal role in expanding solar infrastructure.
- **Engineering, Procurement, and Construction (EPC):** EPC companies are integral to the implementation and construction phase of solar projects. They handle engineering design, procurement of equipment, and construction activities to bring solar installations to fruition. Their 6% representation within the SAPVIA membership underscores their significance in project execution.
- **Financiers:** Financiers provide the necessary capital investment for solar projects to proceed. Whether through loans, equity financing, or other mechanisms, their role in funding solar initiatives is critical for overcoming financial barriers and driving industry growth.
- **Installers:** Installers are responsible for the physical installation of solar panels and associated equipment. Their expertise ensures the proper functioning and efficiency of solar systems, making them essential contributors to the deployment of renewable energy infrastructure.
- **Manufacturers:** Manufacturers produce solar panels, inverters, and other components essential for solar energy systems. Their role in supplying high-quality equipment directly impacts the performance and reliability of solar installations, highlighting the importance of their representation.
- **SMME's (PV GreenCard):** Small, Medium, and Micro Enterprises (SMMEs), particularly those involved through the SAPVIA initiative, PV GreenCard members represent the majority of SAPVIA's membership. Their significant presence highlights the role of local businesses and entrepreneurship in driving solar adoption, fostering job creation, and supporting economic development.
- **Other:** This category includes a diverse range of other players within the value chain such as operations & maintenance companies, research/academic institutions, market aggregators, and importers. While individually smaller in percentage, collectively, they contribute to various aspects of the solar ecosystem, from policy advocacy to education and innovation.

Each group plays a unique and indispensable role in advancing renewable energy initiatives, addressing challenges, and capitalising on opportunities for sustainable development.

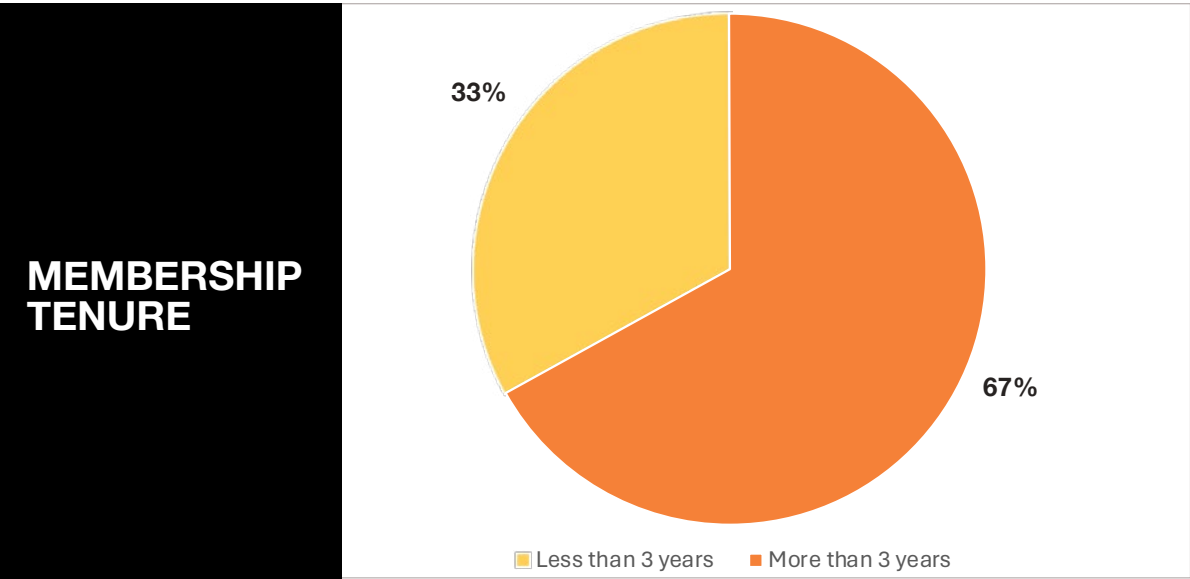
As a member-driven Association, we are committed to improving our services and support to our members. To ensure we are meeting their needs and expectations, we invited our members to participate in the inaugural SAPVIA Members Satisfaction Survey. This feedback was crucial in helping the Secretariat understand member experiences, identify areas for improvement, and enhance the overall member value.

This survey covered various aspects of membership experience, including communication, events, and advocacy efforts. Based on that survey, we received the following feedback:

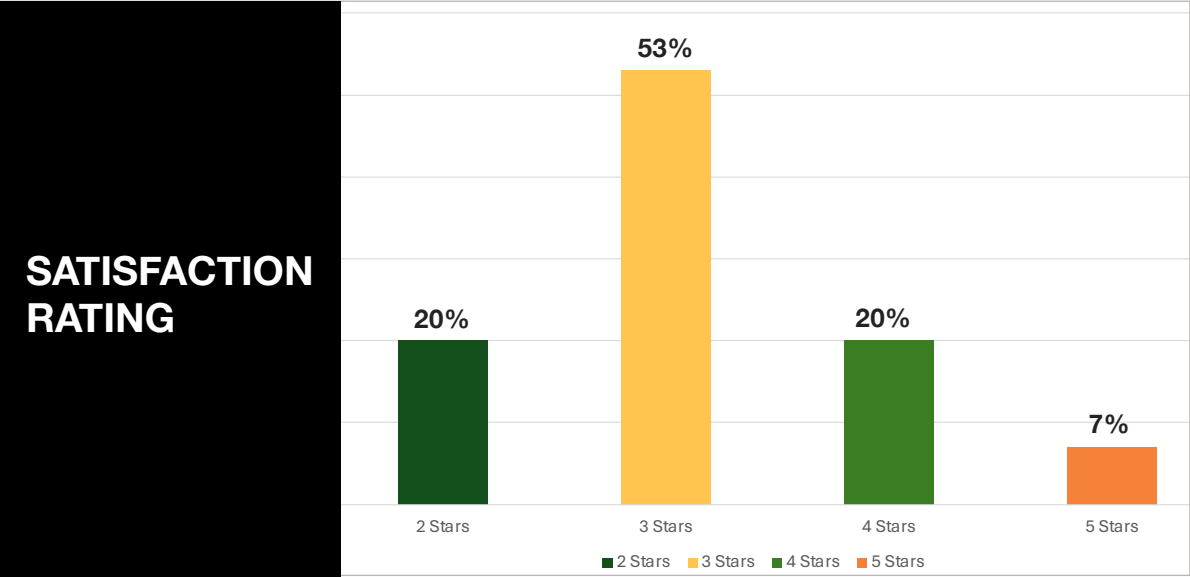
MEMBERS SATISFACTION SURVEY

KEY INSIGHTS:

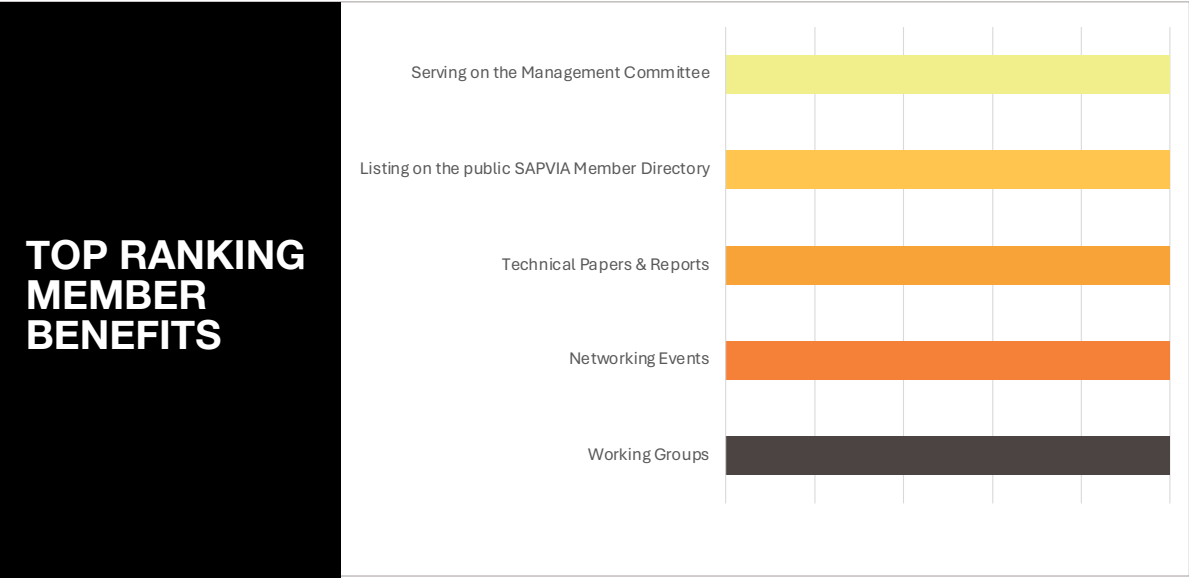
Membership Tenure: A significant portion of survey participants, accounting for 67% of members, have maintained their membership with SAPVIA for more than three years, reflecting a strong sense of commitment and loyalty within the association.



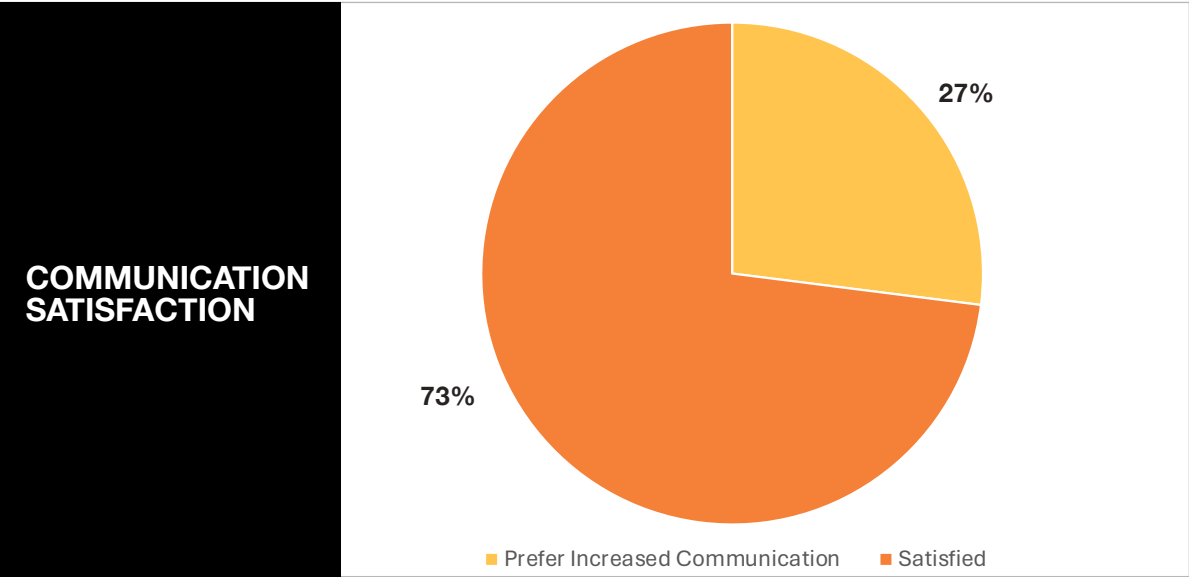
Satisfaction Ratings: When asked to rate their level of satisfaction with their SAPVIA membership, 53% of respondents awarded a 3-star rating, indicating moderate satisfaction. Additionally, 20% rated their satisfaction level as 4 stars, another 20% rated it as 2 stars, while 7% expressed complete satisfaction by giving a 5-star rating.



Top-Ranking Member Benefits: The survey identified the most valued member benefits, with Working Groups, Networking Events, Papers & Reports, listing on the public SAPVIA Member Directory, and Serving on the Management Committee emerging as the top-ranking benefits, highlighting the significance of collaboration, networking opportunities, and access to industry insights.



Communication Satisfaction: A majority of respondents, constituting 73% of members, expressed satisfaction with the level of communication from SAPVIA. However, 27% indicated a preference for increased communication, suggesting an opportunity for the association to further enhance its communication strategies to meet member expectations.



Overall, the survey results provide valuable insights into member perspectives, highlighting areas of satisfaction and areas for improvement, which can inform SAPVIA's efforts to better serve its members and strengthen its value proposition.





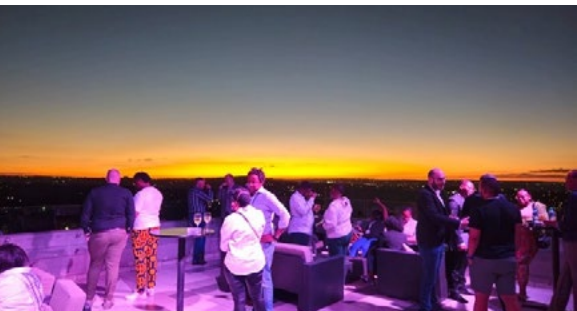
MEMBER ENGAGEMENTS

SAPVIA is dedicated to fostering a robust and collaborative solar photovoltaic (PV) industry. One of the key aspects of this mission is engaging our members through various initiatives and channels:

NETWORKING EVENTS

Networking events are a cornerstone of our engagement strategy, providing members with invaluable opportunities to connect, collaborate, and share insights. Over the past year, SAPVIA has organized several networking events:

EVENT	PURPOSE	FREQUENCY	DATES
Networking Mixers	Informal gatherings aimed at fostering connections and facilitating business relationships within the PV industry.	Quarterly	<ul style="list-style-type: none">30 May 2023 (CPT &JHB)12 December 2023 (JHB)
Webinars	Hands-on sessions focusing on technical skills, regulatory updates, and market trends.	N/A	<ul style="list-style-type: none">06 June 2023 – Renewable Energy Grid Survey23 November 2023 – Solar PV Installed Capacity Dashboard31 January 2024 – PV GreenCard Revamped Website Launch
Industry Roundtables	In-depth discussions on current industry challenges and opportunities, with input from a diverse range of stakeholders.	N/A	<ul style="list-style-type: none">07 March 2024 - CEO Roundtable (CPT)13 March 2024 - IRP 2023 Member Roundtable (CPT & JHB)
Virtual New Member Induction Sessions	Designed to provide new members with a comprehensive understanding of SAPVIA’s mission, activities, benefits, and opportunities.	Quarterly	<ul style="list-style-type: none">17 May 202301 February 2024



NEWSLETTERS

Our newsletters serve as a vital communication tool, keeping members informed about the latest industry news, SAPVIA activities, and upcoming events. Key metrics and content highlights include:

- **Industry News:** Key developments and trends in the solar PV sector.
- **Member Spotlights:** Features on member achievements and innovations.
- **Event Announcements:** Information on upcoming SAPVIA and industry events.
- **Policy Updates:** Summaries of regulatory changes and advocacy efforts.
- **Technical Articles:** Insights into new technologies and best practices.

TENDER NOTIFICATIONS

Providing timely and relevant tender notifications is crucial for helping our members stay competitive and seize new business opportunities. Our tender notification system includes:

Coverage: National tenders relevant to the PV industry.

Categories: Installation, maintenance, consulting, and supply tenders.

DISTRIBUTION

Frequency: Weekly updates to ensure members receive the latest opportunities.

Channels: Email notifications and members-only section on the SAPVIA website.

SAPVIA's commitment to member engagement through networking events, newsletters, and tender notifications has strengthened our community and provided significant value to our members. Moving forward, we aim to enhance these initiatives based on member feedback and industry developments, ensuring that SAPVIA remains at the forefront of supporting the South African PV industry.





SHAPING AND INFLUENCING REGULATIONS AND POLICY DEVELOPMENT

PV GREENCARD 2.0

Renewal, Realignment and Reestablishment. These 3 words encompassed the past year of the PV GreenCard programme. The year was marked by significant changes to the programme primarily due to the implementation of a set of strategic interventions collectively termed the PV GreenCard 2.0 initiative. The initiative was aimed at reestablishing the PV GreenCard as the premier private sector skills development and quality assurance marker for solar PV in South Africa.

The PVGC 2.0 initiative has three core focus areas.

1. Clearly defining the position of the PVGC programme in the legislative and regulatory framework pertaining to electrical installations in South Africa and the implementation and enforcement of requirements based on the regulations.
2. Creating a clear operational structure and operational relationship between the PVGC operational team; the approved PVGC training and assessment centres; and the certified PVGC installation companies and PVGC members.
3. Focus on enforcement and monitoring of compliance with existing requirements, as well as the implementation of new requirements to drive uniformity and standardisation across approved PVGC training and assessment centres.

Further to the core focus areas listed above, three key accomplishments of the PVGC 2.0 initiative during the FY23/24 are worth mentioning: The successful updating of the PVGC training and assessment centre requirements; the strict enforcement of the regulatory requirement that all certified PVGC installation companies must be registered electrical contractors with the department of employment and labour; and finally, the successful revamping, updating and implementation of the PV GreenCard As-Built report, (previously also referred to as a PV GreenCard). The PV GreenCard As-Built report is issued to a Solar PV system owner by a certified PV GreenCard installation company on the completion of a solar PV installation. The PV GreenCard captures equipment, system design and performance information.

The PV GreenCard programme achieved growth in the FY 23/24. The number of certified installation companies grew by 16% from 455 to 528 by the end of March 2024. While the number of PV GreenCard As-Built reports issued saw a quarterly growth rate of 167% from Q3 to Q4 in FY 23/24, coinciding with the launch of the new PVGC digital infrastructure and the launch of the revamped PVGC As-Built report.

The PVGC programme will move into a consolidation phase in the FY 24/25. Key focus areas will include increased stimulation of institutional demand for the PV GreenCard programme through engagement with commercial banking members of SAPVIA and increased marketing of the PVGC programme and the associated quality assurance mechanisms amongst end users and insurance industry stakeholders.

The PVGC programme will look to expand the network of approved training centres and assessment centres to currently underserved areas including Mpumalanga, the Northern Cape, and the South Coast. SAPVIA will closely monitor the demand for PVGC training and assessment in areas with existing training centres and assessment centres, thus trying to balance supply and demand to promote operational sustainability amongst existing centres. In that respect no new training centre or assessment centre applications are being processed in Gauteng, greater Durban, or greater Cape Town until such time that the supply-demand dynamics require new centres.

The successful implementation of the PVGC 2.0 initiative was made possible with the buy-in from legacy PVGC training centres and assessment centres and the PVGC operational team. The continued success of the PVGC 2.0 initiative will hinge upon the ongoing compliance with both existing and newly introduced requirements.

LAUNCH OF NEW PV GREENCARD DIGITAL INFRASTRUCTURE

The successful implementation of the PV GreenCard 2.0 initiative is in no small part due to the revamp and renewal process of the PV GreenCard digital infrastructure. The digital infrastructure includes the PV GreenCard website, the PV GreenCard installer web portal, and the PVGC mobile application. Both the website and the web portal have been successfully launched in the last quarter of the FY 23/24, while the mobile application launch is due in Q2 of the FY 24/25. SAPVIA and the PVGC operational structures are grateful for the ongoing support of Absa and the direct financial support that made the much-needed upgrades to the PVGC digital infrastructure possible.

The digital infrastructure has been a critical part of the PVGC programme from a compliance monitoring, operational efficiency, and member engagement perspective.

A focus area of the digital infrastructure rebuild was streamlining and updating the PVGC administration systems and processes with an emphasis on the user interface. The updated registration process also enables the direct capturing of information related to regulatory requirements including registered electrician and electrical contractor details. This information is stored in a way that allows easy access verification, identification, and export by the PVGC operations team. This information is crucial for continual compliance monitoring, member verification, and dispute resolution.

PV GREENCARD: UPDATING OF THE KNOWLEDGE EXAM AND STREAMLINING OF THE TRAINING AND ASSESSMENT CENTRE OPERATIONS

The PV GreenCard skills development material was initially developed in 2016 and disseminated to approved training and assessment centres. The material has not been formally updated since the initial release in 2017. Individual training centres have made amendments and updates to the training material throughout the years to keep the PVGC training relevant for a changing industry. The shift from grid-tied to predominantly hybrid systems with battery energy storage systems, was one such industry change that required an update to the PVGC training material.

Subsequently, the assessment material also became outdated compared to what was happening in the industry. However, the focus of the assessment remained on fundamental electrical and solar PV design principles and installation competency and thus remained relevant. An update of the assessment material was deemed necessary. The training material would be updated sequentially, starting with the knowledge exam, followed by the practical assessment, and finally the training material would be updated to reflect the new assessment requirements and adequately prepare candidates for the PVGC assessment.

The Knowledge Exam was updated by a sub committee made up of a selection of current PVGC assessment centre staff, including registered PVGC assessors, and moderators. Streamlining and simplification of the Knowledge Exam were key outputs of the process. The Knowledge Exam was reduced to a 100-point multiple choice format. This also futureproofs this exam for online assessment delivery. The exam format also allows for the development of a pool of questions that can be used to generate unique exam papers in a short space of time. Furthermore, the format allows for continuous updating of the exam by updating the base questions to reflect changes in the industry or regulatory requirements. The knowledge assessment focus areas were streamlined to accurately reflect changes in the solar PV installation industry while assessment topics specific to installation electricians were removed.

The Knowledge Exam focus has shifted to compliance with existing regulatory requirements outside of the responsibility of a registered person in terms of the occupational health and safety act, the installation electrician. A focus on the identification of risks associated with the current regulations, standards and municipal SSEG requirements, was also introduced thus removing any perceived or legitimate overlap between and clearly defining the roles and responsibilities of the registered person

and the solar PV installer or PV GreenCard assessed individual.

The updated exam will be introduced to all assessment centres once the sequential updating of the practical exam and training material has been completed. The targeted introduction of the introduction of the suite of interventions highlighted is by the end of the 2024 calendar year.

The operational relationship between the PVGC operational team and the approved PV GreenCard training centres and Assessment Centres, respectively, has been defined with a view to increasing consistency of communication and implementation of the PVGC 2.0 initiative. Furthermore, the relationship encourages regular communication between the approved training centres and assessment centres and the PVGC operational structures.

The introduction of PV GreenCard accreditation letters with defined terms of accreditation, human resources, location and operating company information further legitimised the relationship between the PV GreenCard operating structures and the training and assessment service providers.

Finally, the introduction of a regular operational meeting between the PVGC operations team and the centres further cemented the new operational relationship and structure. The meeting has been well received by the training centres and assessment centres and has been a key enabler of the PVGC 2.0 initiative.

NUMBER OF PV GREENCARD-TRAINED INDIVIDUALS

	Gauteng	Limpopo	Western Cape	Eastern Cape	KZN	North West	Free State	Online	Nigeria	Total
March						31	13			44
April								15		15
May							20			20
June	91		7		12					110
July	70	2	18	8	27					125
August	115	5	47	11	39					217
September	104	1	33		21		9			168
October	169		28		7				29	233
November	133		33		18					184
December	38		35			15				88
January	41		8		6					55
February	54		25		19					98
March	21									21
Total	836	8	234	19	149	46	42	15	29	1378

NUMBER OF INDIVIDUALS COMPLETED PV GREENCARD-ASSESSMENT

	Gauteng	Limpopo	Western Cape	Eastern Cape	KZN	North West	Free State	Online	Nigeria
March						31	13	0	0
April								15	0
May							20	0	0
June	91		7		12			0	0
July	70	2	18	8	27			0	0
August	115	5	47	11	39			0	0
September	104	1	33		21		9	0	0
October	169		28		7			0	29
November	133		33		18			0	0
December	38		35			15		0	0
January	41		8		6			0	0
February	54		25		19			0	0
March	21							0	0
Total	836	8	234	19	149	46	42	15	29
Certificate Issued23/24	793	8	196	19	127	45	41	0	0
Certificates Issued2023	676	8	159	19	104	45	41	0	0
Certificates Issued2024	117	0	37	0	23	0	0	0	0

INFORM AND EDUCATE MEMBERS AND OTHER STAKEHOLDERS

EWSETA PILOT PROJECT

SAPVIA together with The Energy and Water Sector Education and Training Authority (EWSETA) partnered to improve the technical capacity of the Small-Scale Embedded Generation (SSEG) market in South Africa, through a Solar PV training programme that aimed to impart solar PV skills to 20 electricians. The goal is to increase the pool of upskilled electricians and PV GreenCard certified installers with experience in accessing Solar PV GreenCard training and assessment.

The SSEG market of the solar PV sector in South Africa is growing exponentially and as it expands, safety and quality installation remain paramount. With the increasing demand for secure, affordable, and sustainable power solutions, there is a need for training programmes that provide electricians and individuals with the skills and knowledge in PV design, installation, and maintenance.

The Solar PV GreenCard training programme seeks to bridge the gap between AC and DC skills in the South African solar PV industry by equipping participants with relevant training to enable them to comply with regulations, adhere to safety standards, and conform to global best practices. The training includes theoretical and practical sessions to ensure that all the participants can handle all parts of solar PV installation work. Training will commence in November 2023.

The programme identified 20 electricians to undergo this training and assessment. 18 learners successfully completed the assessment

RESEARCH AND MARKET INTELLIGENCE

Installed capacity project

In October 2022, SAPVIA embarked on the task to accurately quantify the number of Solar PV installations in South Africa. SAPVIA, in collaboration with GeoTerra Image and PrimeThought concluded an agreement to develop, market and launch a Solar PV database and Data product to the market in 2023.

The project aims to accurately quantify the installed capacity of solar PV in South Africa by feeding satellite imagery into a machine learning algorithm that classifies and quantifies the location, number of panels, and the size of the Solar PV system. The algorithm captures systems from Domestic to Commercial and Industrial to utility scale.

The data project was released to the public in October 2023 in the form of a publicly accessible dashboard. It tracks the total installed capacity per quarter and breaks down the total installed capacity according to 4 SAPVIA defined market segments and system size groupings, namely residential (0-30kWp), commercial and industrial SSEG (30kWp – 1MWp), C&I large scale and utility scale (1MWp – 50MWp) and pure utility scale (Larger than 50MWP).

The project captured the installed capacity data for quarter 4 of 2022 and quarter 1 of the 2023 calendar year. The delay to the updating of the data dashboard has been predominantly due to the high cost of high-resolution satellite imagery and the availability of high-resolution imagery for the entire country. SAPVIA is currently investigating funding models to sustain the installed capacity project.

The release of the dataset has been well received by SAPVIA members, industry stakeholders, and by public sector stakeholders alike. The dataset allowed SAPVIA to accurately state the rate of distributed generation capacity additions in comparison to capacity allocations presented in the draft IRP 2023. Furthermore, the availability of the installed capacity datapoints have allowed SAPVIA to engage meaningfully with municipal distribution entities regarding the success of SSEG registration processes throughout the country.

Finally, the dataset has allowed SAPVIA to build new and strengthen existing partnerships and relationships in the industry by making portions of the dataset available for publication in partner reports. One example is the SALGA status of SSEG report. The installed capacity dataset provided insight into the real rate of SSEG deployment in the country and enabled an evaluation of the programmes initiated by municipal distributors to encourage the registration of SSEG systems. Furthermore, the installed capacity dataset in conjunction with the Eskom rooftop PV dataset, the only other publicly available dataset quantifying the installed solar PV capacity in South Africa, allowed SAPVIA to calculate the likely residential BESS installed storage capacity in South Africa for use in various applications.

The applications of the installed capacity dataset are wide-ranging especially when analysed in conjunction with other GIS data points that use building type, available roof area, building age, as well as living standards means or spending power metrics. Thus, it enables a much deeper and specialised analysis of the South African solar PV market for both private and public sector applications.

SAPVIA would like to thank the installed capacity project partners, GeoTerra Image and PrimeThought software solutions for their technical support and subject matter expertise that made the project a success.

State of South African Manufacturing Report; its potential and resources for further development of PV value chain and potential export to the European Union. SAPVIA believes that there is value in localising the manufacturing of some components to bolster national industrialisation imperatives, create much-needed jobs, and possibly export to other jurisdictions including Europe. It is for this reason that we embarked on a study with our European counterparts to unpack opportunities following our initial study concluded in 2022.

The Study, building on a report released by SAPVIA in 2022 titled **the localisation potential of the South African solar photovoltaic (PV) industry and recommendations to support local manufacturing in South Africa**, focuses on an updated analysis of South Africa’s solar PV manufacturing value chain, aiming to inform public policies and private investments for strengthening local manufacturing and assembly. This research further aligns with the European Union’s renewable energy goals, to diversify and integrate the global solar supply chain while strengthening private sector collaboration between the EU and South Africa to bolster solar PV industrial development.

Further, the research seeks to inform policy makers of the global interconnected structure of the solar PV value chain, showcasing the nature and extent of industrial policy support for component manufacturing in various global markets. These policy interventions have driven the rapid rise and subsequent concentration of solar PV component manufacturing in China. This development underscores the need for strategic policies and investments to capitalize on manufacturing opportunities in the solar PV market in South Africa and to leverage global shifts in renewable energy demand and supply.

In conjunction, understanding the local dynamics within the South African PV sector is essential for gauging the potential for localization. Issues such as regulatory hurdles, supply chain constraints, and skills shortages must be collectively addressed through appropriate and workable policy support mechanisms and interventions to unblock the identified opportunities.

Leveraging this study, SAPVIA and the project partners recommend practical and sustainable policy approaches for South African policy makers. This requires collaboration with the private renewable energy sector to promote achievable solar PV industry localization.

SAPVIA wishes to thank the project partners, Solar Power Europe for sharing in the vision for a diversified global solar PV value chain. We would also like to acknowledge GIZ through the South African - German Energy Partnership for their financial and holistic support throughout the development and dissemination of the study.

FACILITATE PARTNERSHIPS AND COLLABORATION

KEY PARTNERSHIPS

In the past year, we have engaged extensively with various stakeholders, continuing to proactively target key parties to ensure that solar PV’s benefits are widely recognised.

We are widening our international footprint by collaborating on the following initiatives:

- Solar Power Europe research initiatives
 - BSW (German Solar Association)
 - UNDP on private PPAs
 - GIZ engagements on various initiatives
 - Clean Energy Council of Australia
- Global Solar Council
 - European Delegation
 - Res4Africa
 - Various international embassies

Our standing engagements across the year included:

- IPPO
 - Minerals Council
 - BUSA
 - NEDLAC
 - Global Solar Council Meeting
 - Solar Power Europe
 - Eskom
 - Energy Council of South Africa
 - University of Cape Town
- CSIR
 - GreenCape
 - ECA
 - Small Enterprise Financing Agency
 - SALGA
 - DFFE
 - SAPOA
 - LSF
 - BravoScan

We also enjoy positive working relationships with key government bodies and representatives and have standing meetings with IPPO, SAREM and BUSA .

To ensure solar PV plays a central role in South Africa’s energy mix, we have joined the Energy Council and co-lead a grid access working team.

STAKEHOLDERS

Key Group	What they expect	How we create value
Current Members	<ul style="list-style-type: none">• Membership value• Networking opportunities• Technical assistance aligned with best practice.• Formal representation at industry organisations and forums	<ul style="list-style-type: none">• Review of member benefits• Networking events• Efficient Working Groups
Potential Members	<ul style="list-style-type: none">• Increased understanding of SAPVIA's role in advancing the sector	<ul style="list-style-type: none">• Value proposition aligned to their needs
Employees	<ul style="list-style-type: none">• Good working environment• Fair remuneration	<ul style="list-style-type: none">• Fair remuneration• Retention strategy
Policy Makers	<ul style="list-style-type: none">• Participation in commentary on policy	<ul style="list-style-type: none">• Provide access to knowledge and opinions of the industry
Partners	<ul style="list-style-type: none">• Sharing of relevant information with SAPVIA members	<ul style="list-style-type: none">• Increased brand awareness through mutual alignment
Service providers	<ul style="list-style-type: none">• Prompt payment• Fair procurement processes	<ul style="list-style-type: none">• Prompt payment• Adherence to procurement policy



WORKING GROUPS

WORKING GROUPS

Our working groups are instrumental in driving the growth, sustainability, and professionalism of the solar energy industry in South Africa. This year we were intentional about the direction the Working Groups would take. We conducted research on industry and non-industry associations on their WG model to ensure we address pressing industry issues and align with our key strategic objectives. With our member-focused approach, we profiled our Working Groups members on our website where chairpersons of the working groups shared their vision and mission for their respective groups

DISTRIBUTED GENERATION



DEVILLIERS BOTHA – CHAIRPERSON
SOLAREFF

The Distributed Generation Working Group (WG) is focused on driving industry market access and quality for all stakeholders, particularly the end user. In so doing, the group is tasked to work with government, local municipalities and other relevant stakeholders such as Eskom and NERSA, in the creation of a viable and sustainable embedded PV market in South Africa.

The WG had the following focus areas:

Private PPA <ul style="list-style-type: none">• Bankability• Aggregators/Traders• Wheeled vs Embedded• Project financed (big) vs balance sheet funded (small)	Utility/Administrative Engagements <ul style="list-style-type: none">• CAA engagements• NERSA engagements Standardization <ul style="list-style-type: none">• Civil Aviation Authority Rules• EPC Contract	Regulatory Engagements <ul style="list-style-type: none">• DFFE• Eskom Grid Access & Engagements Incentives <ul style="list-style-type: none">• Tax breaks• Tariff stimulus
Wheeling <ul style="list-style-type: none">• Municipal Framework• Eskom Wheeling		

WORD FROM THE CHAIRPERSON

Distributed Generation, which includes SSEG, EG, Wheeling Projects, BESS, in broad terms is the future solution for energy supply, locally and also internationally. The reason is that on-site or localised generation (i.e. generation closer to load centres) from alternative and mostly RE resources is fast becoming cheaper than the traditional vertically integrated energy supply systems. Vertical systems also mostly rely on fossil fuels which we must transition away from, in the interests of sustainability.

“Everyone has a duty to plough back into the industry within which they operate”. This working group provides the opportunity for members from various backgrounds to become involved and contribute in fields wherein those individuals have expertise and could make a difference. It also creates the opportunity where participants in our industry get to know each other, thereby building their network to be able to share knowledge and gain insights. One proviso is however that this is a “working group”, not a sitting group, committee, or passenger group. If you don’t contribute and intend to just gain and not share then this group might not be for you.”

This working group has diversified work streams that focus on specific topics, and overall there is focus on a broad scope of industry interests. Feedback from these focused groups is then provided back to the larger working group, ultimately to the benefit of the industry at large.

GRID ACCESS

ZAYD VAWDA – CHAIRPERSON
WSP



The GAWG is focused on addressing matters related to grid connections. The working group is tasked to work with Government, the National Energy Regulator of South Africa (NERSA), Eskom and local municipalities to promote viable and sustainable grid access for Renewable Energy (RE) plants – specifically focusing on the large-scale (REIPPPP) market segment, as well as other RE market segments as required (e.g. mid-scale market for Wind and solar PV projects in the 5 to 50MW range, as well as embedded solar PV).

The Working Group focus areas as as follows:

- Transmission IPPs
- Clarity on Grid Capacity Allocation Rules
- Applications for Above 132 KV Transmission for Direct Access
- Investigation into Cost Estimate Letters
- Addressing Understaffing in Grid Access Units and Distribution: Advocating for increased staffing levels with Eskom
- Enhanced Engagement with Developers
- Meter Applications for Smaller Projects
- Reimbursement for Electricity Fed into the Grid
- Validity of Allocation Guarantees

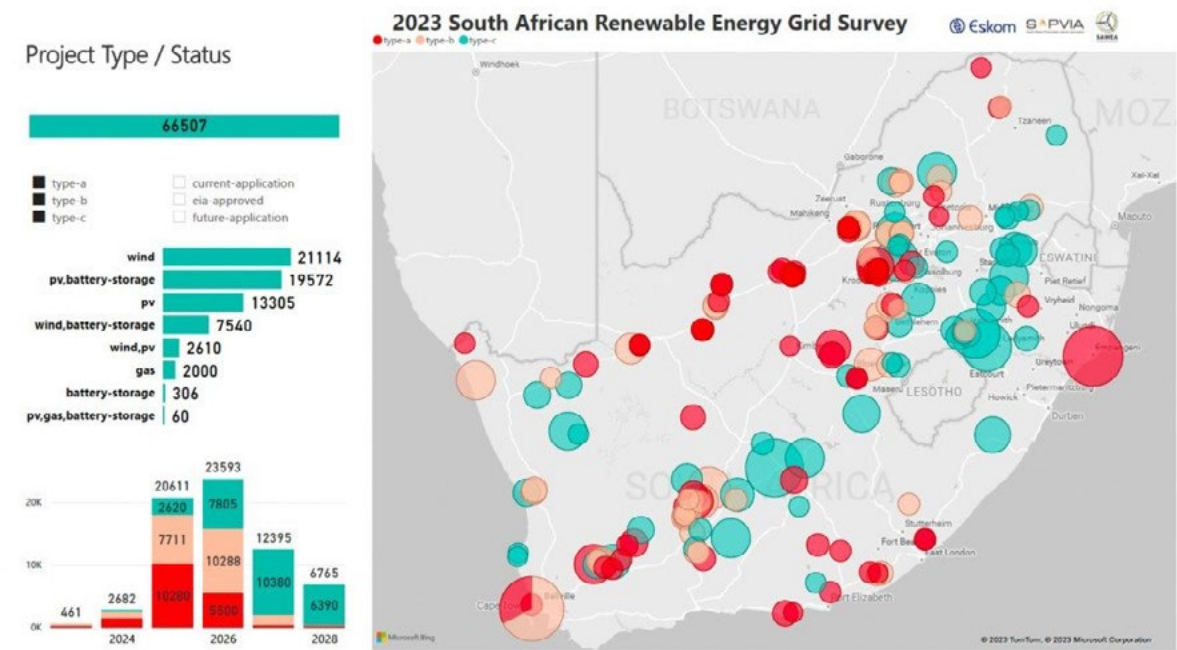
WORD FROM THE CHAIRPERSON

Grid Access is the single greatest challenge for the integration of renewables into the grid, at home in SA and also across the planet. This working group seeks to provide a platform for industry to support each other in all matters related to grid access, grid capacity, and Eskom/industry discussions as well as keep up to date on the latest grid access rules.

Understanding the rules regarding grid access isn’t always easy. This group is a great place to touch base with other industry colleagues, and to share knowledge, insights, and tips, as well as get access to the latest developments and updates in the transmission grid access space. We also provide updates from the Energy Council and NECOM discussions with Eskom. We are also the creators and custodians of the National Annual Renewable Energy Grid Survey which is in the 3rd year of its existence. The national grid survey has become a key document to inform upcoming Eskom Transmission Planning studies such as the GCCA and TDP.

Participation by anyone in the industry with an interest in doing grid access applications is encouraged. Future working groups will encourage grid managers from IPPs to assist with sharing knowledge from their experience.

Working Group Achievement
3rd annual South African Renewable Energy Grid Survey (SAREGS)



The Grid Access WG to lead on the development of the 2023 South African Renewable Energy Grid Survey, compiled by Eskom in collaboration with the South African Wind Energy Association (SAWEA) and the South African Photovoltaic Industry Association (SAPVIA), the survey was published on 6th June 2023 on the following platforms:

- <https://www.engineeringnews.co.za/article/renewable-energy-grid-survey-points-to-66-gw-development-pipeline-in-south-africa-2023-06-06>
- <https://www.esi-africa.com/renewable-energy/renewable-energy-grid-survey-pinpoints-66gw-of-opportunities-in-sa/>
- https://www.news24.com/fin24/climate_future/energy/sa-can-add-30gw-of-wind-energy-in-10-years-but-grid-challenges-will-be-our-undoing-expert-20230619

SKILLS FOR PV



**ANTJE KLAUSS-VORREITER – CHAIRPERSON
GREEN SOLAR ACADEMY**

The Skills for PV Working Group focuses on skills development for capacity development. Looking at scarce skills and opportunities to create a suitably qualified workforce in solar PV. The WG is engaging with various stakeholders, including EWSETA, merSETA, SAQA, QCTO, Academia, NBI, Harambe and other relevant institutions to direct and support key initiative to achieve this mandate.

The WG focus areas for the financial year are:

- PV GREEN Card Assessment to promote as industry standard,
- The updating of Training and Assessment content, and develop a road map for continued development
- ECA-SAPVIA Alignment

WORD FROM THE CHAIRPERSON

The PV industry is growing yet also lacking in key skills. This group works to fill the gap and identify the skills that are needed in the PV industry, and drive the development of training programmes and their quality assurances.

The group also works to ensure that the training guidelines developed are in line with the needs of the industry.

The development of road maps for solar PV training in different educational levels from schools, TVET colleges, and universities, is another key focus area. The group also works to ensure that the quality of the training meets the standards and demands of the industry

ENVIRONMENTAL



**PATRICIA SCHRÖDER – CHAIRPERSON
URBAN ELEMENTS**

PATRICIA SCHRÖDER - CHAIRPERSON URBAN ELEMENTS

The Environmental WG focuses on the environmental impact of renewable energy. Identifying responsible solutions to address environmental challenges caused by the deployment of renewable energy technologies. The WG should also quantify the positive impact the renewable energy offers, including avoided carbon emission as well as providing strategic review and comment on permitting/regulatory aspects of solar/wind energy development/implementation/operation and environmental aspects of the solar/wind energy industry in general.

Focus areas for this Working Group:

- Permitting and licensing
- EPR
- Regulatory updates

WORD FROM THE CHAIRPERSON

The Environmental Working Group is important as it keeps members informed with information regarding any new regulations applicable to the industry, regulatory changes or amendments, environmental best practices and compliance, trends, and any other relevant topics.

The participants are passionate about making a difference and serving the sector for the best environmental results. The working group presents opportunities to learn and gain experience in areas outside of their own expertise and to share their knowledge. Participants and their specific expertise provide credibility to the work achieved in the working group.

The working group will closely follow the demands of an ever-changing industry, and adapt its knowledge base and skill set accordingly.

MANUFACTURING



PATRICK GOVENDER – CHAIRPERSON
ENEL GREEN POWER SOUTH AFRICA

The Manufacturing Working Group focuses on specific issues that relate to the development of local PV value-chains, and to contribute to a meaningful definition and position of local content as it relates to the REIPPPP and other government-led procurement programme. The WG is made up of local manufacturers, OEMs, and component distributors.

The focus areas for this WG are:

- Protection of local manufactures
- There is little to no regulations for local Manufactures.
- Incentivizing of manufactures for job creation and local innovation
- Development of local standards for Specifications
- Specification documents for importing components and assembly components

WORD FROM THE CHAIRPERSON

The goal is to raise awareness among all stakeholders that buying locally manufactured products will ensure that the money spent by citizens stays in the country. It will also assist the country in growing the economy, safeguarding jobs, and creating more jobs.

The benefit of this group’s work is lies in mutual learning, and collaboration with experts. Each member will have something they can give the other team members. Local Manufacturing Members can get to understand the industry’s needs and requirements. End users will be able to understand what locally produced equipment is available in the market and share their requirements with the group.

The working group is expected to be able to engage with all industry stakeholders and offer solutions for all locally produced equipment and services at competitive rates.

GENDER DIVERSITY



NOMFUNDO MBIJEKANA – CHAIRPERSON
SOLAR GROUP

The GDWG promotes focused attention by key stakeholders in the industry to address gender representation. The success of this initiative requires champions from the industry, of all genders, to contribute their time, skills and knowledge for the benefit of the industry.

The Department of Mineral Resources and Energy (DMRE)’s “Women Empowerment and Gender Equality (WEGE) Strategy” aimed at ensuring that women become active participants in the Energy Sector.

The WEGE Strategy is framed on the following four pillars:

- Enabling Environment: Create an enabling policy environment for translating government commitment to gender equality into reality.
- Equality of Opportunities: Work towards achievement of equality of opportunities and treatment within the DMRE, SOEs, the energy sector and broader society.
- Gender Mainstreaming: Ensure that gender considerations are integrated effectively into the DMRE, SOEs and energy sector policies, programmes, and projects.
- Barrier Free Workplaces: Advocate for the promotion of new attitudes, values, behaviours, and a culture of respect for all human beings in the sector.

WORKING GROUPS ACHIEVEMENTS

Generation Renew

The joint SAPVIA and SAWEA Gender Diversity Working Group hosted an event called “Generation Renew,” which aim the to address the barriers to entry information with students within in the Renewable Energy space. The event addressed the different career choices available within the sector and unpacked further opportunities under the theme: “Accelerating youth skills and entrepreneurship in renewable energy.”



The WG further highlighted young women to be on the lookout for in the RE industry focusing on the 2023 internship cohort.



ECONOMIC DEVELOPMENT WG



The purpose of this Working Group is to provide the industry (both wind and solar) with the necessary support to enable the best possible social and economic outcomes for communities. The working group is also a platform to develop and disseminate the information, monitor progress and assess impacts, promote good relationships amongst communities and IPPs and last but not least to demonstrate the power and benefits of the renewable energy industry (wind and solar) to the general South African citizens.

Focus areas for the Working group are:

- BBB-EE Sector Codes
- ED Subcommittees
- Just Energy Transition (JET)

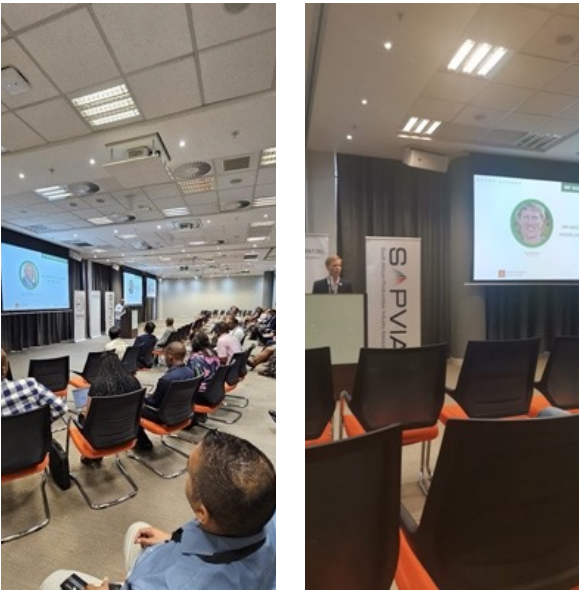
POLICY AND ADVOCACY RELATED EVENTS

IRP Inputs

SAPVIA and SAWEA hosted a roundtable to engage members on the Integrated Resource Plan (IRP) 2023 which was launched in January 2024 and provides an opportunity for members to provide verbal feedback, ahead of the written feedback submission deadline.

SAPVIA has been actively engaged in providing inputs and comments to shape this essential roadmap for our country’s energy future. SAPVIA has a long history of supporting and contributing to the IRP process.

Since the release of the Draft IRP 2023 on 04 January 2024, SAPVIA has participated in various stakeholder engagement sessions to gather industry inputs and formulate a comprehensive response.



Through these extensive consultations, SAPVIA has consolidated the views and recommendations of its diverse membership to put forward a robust submission aimed at optimizing the final IRP 2023.

SAREM

SAPVIA has been involved in the project Steering Committee overseeing the creation of the South African Renewable Energy Master Plan on targets and signing off on negotiating targets among the various stakeholders. A draft document was distributed for feedback in the fourth quarter of 2023, subsequently approved, and scheduled for presentation in December 2023, although this was postponed to early 2024.

PARTNERSHIPS & COLLABORATIONS



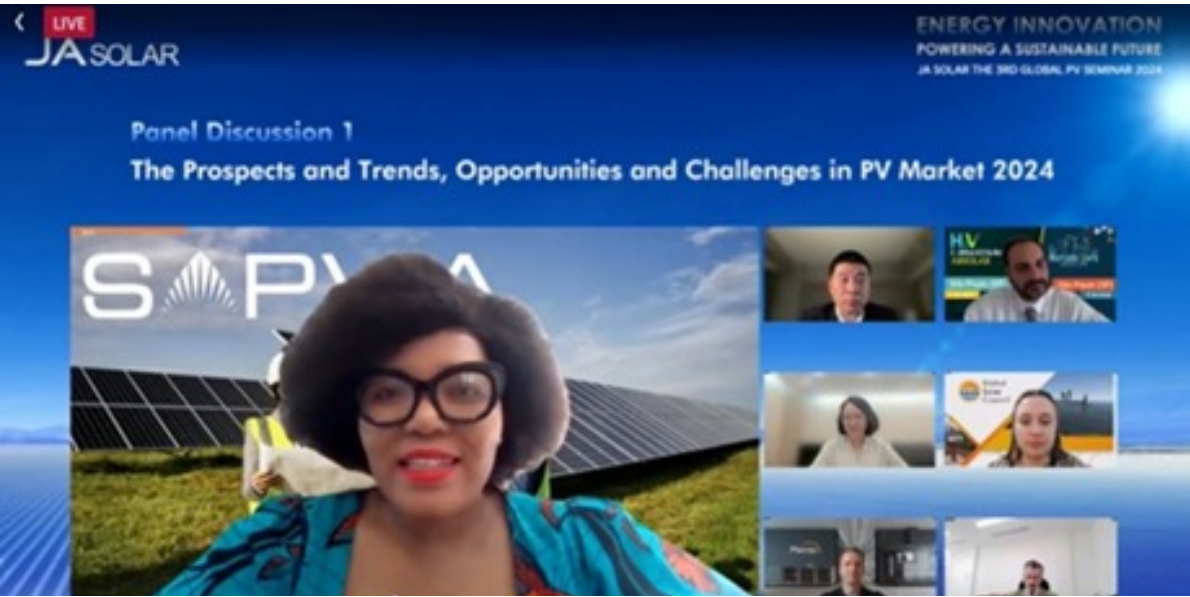
SAPVIA/SAWEA MDP Final presentation and closing ceremony

The 2023 Wits Business School Management Development Programme (MDP) for Women in the RE Industry cohort final presentation and ceremony took place on 13th October 2024

LIMPOPO INVESTMENT CONFERENCE 2023

The event introduced potential and existing investors to the Limpopo investment opportunities in Mining & Mineral beneficiation, Agriculture & Agro-processing, Tourism, Green Energy, Industrial Infrastructure and the Automotive Sector.

ESI AFRICA ON BEHALF OF JINKOSOLAR



The CEO had the opportunity to speak at the ESI Africa webinar on the topic: How to reduce C&I and utility-scale solar LCOE and O&M costs

- Designing the plant for success and LCOE and O&M cost models
- Reliability and reducing unexpected O&M costs
- Technical solutions to maximise the asset value
- Available technologies to improve plant efficiencies
- Case studies in sub-Saharan Africa

THE SOLAR SHOW



SAPVIA partnered with Solar & Storage Live Africa and The Future Energy Show Africa, which took place between 18 – 20 March at the Gallagher Convention Centre. Ten of our Training and Assessment centres participated in their Installer University segment.



SOLAR POWER SUMMIT
Dr Melamu speaking at The Solar Power Summit 2024 Mission Solar topic covered “Emerging solar markets - tracking changes and spotting opportunities for investments in Africa”

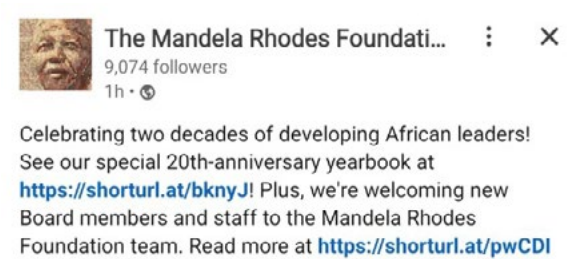
SCATEC SITE VISIT



CEO BREAKFAST



SAPVIA and SAWEA hosted a CEO breakfast together with GWEC and Get Invest, to engage with CEOs/Leaders of wind and Solar PV Project Developers. The roundtable discussion focused on investment Challenges and Opportunities affecting the South African renewable energy market.



THE MANDELA RHODES FOUNDATION
Dr Melamu appointed as a board member of the Mandela Rhodes Foundation.



SANEA

Participated in The South African National Energy Association (SANEA) and WBS as a panelist for a discussion on the highly anticipated updated Integrated Resource Plan (IRP)



ENEL GREEN POWER CAREER AND BURSARY EXPO PRIESKA

SAPVIA attended the Building a Sustainable South Africa - Career and Bursary Expo held at the Gariep High School in Prieska on the 22nd of February 2024. This event formed part of EGP's Sustainability and Community Outreach programme. The event connected learners in EGP's operational areas with opportunities in the renewable energy sector and raised awareness about the bursaries offered by EGP as well as future career prospects for learners in Grades 10, 11 and 12 around Prieska. SAPVIA supported EGP by sharing information about the South African Solar PV industry and the opportunities presented by SPAVIA members and initiatives including the PV GreenCard programme.



TAIWAN AFRICA BUSINESS FORUM



In November we participated in the 2024 Taiwan Africa Business forum. A 5-day trade and investment tour to Taiwan facilitated by the Taipei Liaison office for economic development. We presented at the 2024 Taiwan-Africa CEO, a highlight of the forum events. The presentation showcased the renewable energy and solar PV market and investment landscape in South Africa and was used to drive a localisation and local manufacturing agenda. The forum included trade visits to local research and development institutes and renewable energy manufacturers.

SOLAR POWER EUROPE & GIZ

We partnered with Solar Power Europe to conduct a follow-up study quantifying resources and investment required to unlock manufacturing along the value chain.

This project is financially supported by GIZ and research is conducted by a consulting company, Blueprint.

Through our partnership with Solar Power Europe, SAPVIA had the opportunity to attend and at the Solar Power Summit cover the topic “Global Manufacturing and CRM – Opportunities for Supply Chain Integration between the EU and Africa”.

PROMOTE HIGHER USAGE OF SOLAR PV IN PUBLIC AND PRIVATE SECTOR

MEDIA SUMMARY	
Print	214
Online	358
Broadcast	26
Total number of clips	608
Total AVE	R 29 056 427,30
Total reach/circulation	502 788 708
Content pieces developed	21
Media queries	17

SAPVIA SOCIAL MEDIA GROWTH

Platform	2023	2024	Growth
LinkedIn	15 990	19 320	21%
X (formerly Twitter)	5 636	5 723	1.5%
Facebook	3 067	3 457	17.83%





HUMAN RESOURCES

2023/2024

NEW TEAM MEMBERS

Sinethemba Mnguni: In November 2023, Sinethemba joined our team as a Junior Technical Specialist. Sinethemba has enhanced technical capacity and capabilities, to deliver high-quality technical support and expertise to our members.

Pamela Gama: Pamela has joined the team as Policy Analyst Intern, she was previously an intern through the Wind Industry Internship Programme (WIIP) initiative, run by SAWEA. Her performance during her internship was good, and we are confident that she will continue to make valuable contributions in her new capacity.

FUTURE RECRUITMENT PLANS

Communication and Marketing Professional: In line with our strategic goal to strengthen communication across a social media engagement and strengthen the SAPVIA brand, we also aim to recruit a dedicated marketing professional. This addition will help us effectively communicate our initiatives, achievements, and the value we provide to our members.

Policy Specialist: To further solidify our policy and advocacy efforts, we plan to recruit a full-time Policy Specialist in the current financial year. This role is crucial in ensuring our participation in policy and regulatory reviews, and strengthening our research efforts whose aim is to inform future policy.

COMMITMENT TO YOUTH EMPOWERMENT

WIIP Internships: Continuing our commitment to empowering young individuals with skills in the solar space, we have taken on another intern through SAWEA's WIIP initiative this year. This initiative is integral to our mission of fostering the next generation of professionals in the renewable energy sector, and we are proud to support and develop emerging talent.

These developments are a testament to SAPVIA's dedication to enhancing our organizational capacity and delivering value to our members.

SECRETARIAT	Gender	Race
Dr Rethabile Melamu	Female	Black
Lineo Masopha	Female	Black
Sinethemba Mnguni	Male	Black
Lesego Selepe	Female	Black
De Wet Taljaard	Male	White
Zimkita Bilibana	Female	Black
Interns		
Pamela Gama	Female	Black
Thabang Molai	Female	Black
Phuti Moabelo	Male	Black

We look forward to the positive impact these new team members and initiatives will bring to SAPVIA and to our continued success in 2024 and beyond.

SAPVIA is committed to building a strong, dynamic, and skilled team. Our ongoing efforts in recruitment and youth empowerment are designed to ensure we stay at the forefront of the solar PV industry. We are excited about the future and the new opportunities these developments will bring.





FINANCIAL INFORMATION

STATEMENT OF FINANCIAL POSITION: 2023 – 2024 FINANCIAL STATEMENTS

This report highlights our net asset value, revenue growth, operating expenses, and strategic sponsorships during the financial year.

NET ASSET VALUE

SAPVIA's net asset value as of 31 March 2024 stands at R7 million, a positive increase from the previous year's R5 million. This growth is primarily attributed to healthy cash balances and a rise in membership revenue by 34% in 2024.

OPERATING EXPENSES

Our operating expenses increased by 12% compared to the prior year. The key drivers behind this increase include:

- **Secretariat Expansion:** The Management Committee strategically planned to expand the Secretariat. During the second half of this financial year, we appointed a Junior Technical Specialist. Additionally, three resources who joined six months into the prior financial year now have their salaries recorded for the full financial year.

STRATEGIC SPONSORSHIPS

ABSA'S CONTINUED SUPPORT

We extend our heartfelt gratitude to ABSA for their unwavering support over the last year. Their sponsorship of the PV GreenCard programme has been instrumental in advancing our initiatives. We are pleased to announce that ABSA will continue supporting the programme in the new financial year, further enhancing its impact.

WELCOME EWSETA

In addition, we are excited to welcome our new sponsorship partner, EWSETA. Through our partnership, EWSETA has funded 18 learners to complete their PV GreenCard training and assessment. We aim to expand this collaboration in the years to come, empowering more individuals in the renewable energy sector.

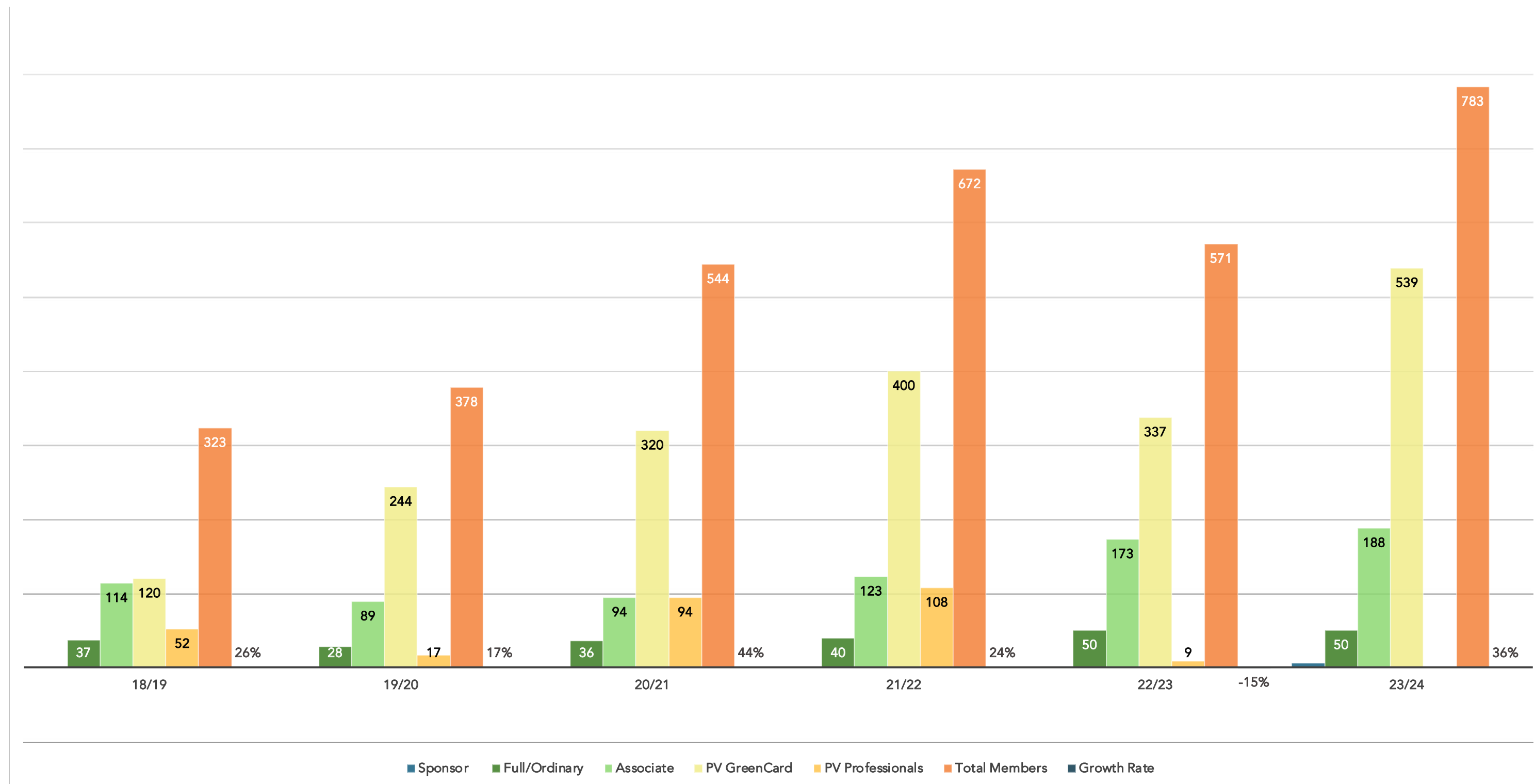
SAPVIA remains committed to promoting sustainable energy solutions and fostering strong partnerships. We appreciate your continued support and look forward to achieving even greater milestones in the future.



Financial Year	2018/19	2019/20	2020/21	2021/22	2022/2023	2023/2024
Income Statement	Audited	Audited	Audited	Audited	Audited	
Revenue	2 419 131.00	2 338 386.00	3 131 411.00	4 080 574.00	4 400 795.00	6 574 359.00
PVGC Revenue	52 647.00	136 705.00				
Sponsorship	5 200.00	53 662.00	756 765.00	385 000.00	1 437 737.00	487 795.00
Other Income	-	-		2 696.00	14 231.00	1 959.00
Interest Received	35 181.00	56 584.00	47 079.00	84 189.00	224 337.00	480 832.00
Total Income	2 512 159.00	2 585 337.00	3 935 255.00	4 552 459.00	6 077 100.00	7 544 945.00
Operationg Expenses	- 1 837 791.00	- 2 583 763.00	- 2 700 814.00	- 3 302 649.00	- 5 674 308.00	- 6 467 459.00
PVGC Estimated Expenses	-260 644.00	-289 131.20	304 539.00	92 541.00		
Profit/Loss	413 724.00	- 287 557.20	1 234 441.00	1 249 810.00	402 792.00	1 077 486.00
Balance Sheet	2019	2020	2021	2022	2023	2024
Assets	822 178.00	1 180 648.00	3 251 478.00	3 251 039.00	4 924 290.00	7 461 217.00
Liabilities	270 277.00	916 304.00	1 795 310.00	447 286.00	1 717 749.00	3 177 190.00
Equity	551 901.00	264 344.00	1 456 168.00	2 803 753.00	3 206 541.00	4 284 027.00



ANNEXURES



ASSOCIATE MEMBERS



ASSOCIATE MEMBERS



ASSOCIATE MEMBERS



FULL MEMBERS



FULL
MEMBERS



SPONSOR
MEMBERS



MEMBERSHIP

OUR VALUE PROPOSITION

	Sponsor Membership: aimed at organizations that wish to financially contribute to the costs involved in running the Association and its programmes		Ordinary/Full Membership: Members can upgrade to Sponsor Membership for additional benefits.		Associate Membership: Members can upgrade to Full or Sponsor Membership for additional benefits.
	<u>Sponsor Platinum</u> Fees	<u>Sponsor Gold</u> Fees	<u>Ordinary/Full – Premium</u> Fees	<u>Ordinary/Full – Corporate</u> Fees	Fees
Grow Your Business					
Brand placement (banner) across the SAPVIA website (with click through to company own website)	•				
Brand placement (banner) across the PVGC website (with click through to company own website)	•	•			
Logo + 100-word company description on the website	•	•			
Social media mentions: company profile, initiatives and company post on LinkedIn, Facebook, and Twitter (combined following of over 13 000 followers)	•	•			
Branding at all PV GreenCard /SAPVIA networking events, workshops, and webinars	•	•			
Marketing material at all SAPVIA Networking event or relevant workshop	•	•			
Company’s description email sent to SAPVIA membership (200 words)	•	•			
Product/Services presentation at all SAPVIA Networking events and relevant workshops	•	•			
Sponsor press release submitted to SAPVIA Marketing & Comms team for publishing	•	•			
Feature in the SAPVIA monthly newsletter (advertorial)	•	•			
Company profile on the online members directory	•	•	•	•	•
1 x news per month to be included in our newsletter	•	•	•	•	•
Company news on SAPVIA website and related post on our social media	•	•	•	•	•
Weekly PV-related tender notifications	•	•	•	•	•

MEMBERSHIP

OUR VALUE PROPOSITION (cont.)

	Sponsor Platinum	Sponsor Gold	Ordinary/Full – Premium	Ordinary/Full – Corporate	Associate
Insight & Thought Leadership					
Guide and direct targeted research outcomes	●	●	●		
Working Groups	Max. 5 participants	Max. 5 participants	Max. 3 participants	Max. 2 participants	Max. 1 participant
Access to our technical resource – private meetings	●	●			
Technical Support (via email)	●	●	●	●	●
Free participation to thematic webinars	●	●	●	●	●
Networking & Events					
Priority invitations to speak at industry events	●	●			
Exclusive invitation to SAPVIA’s bi-annual CEO breakfast	●	●	●		
Attendance to exclusive networking events	●	●	●	●	●
Influence					
Able to propose a webinar subject	●	●	●		
Eligible to serve on the SAPVIA Management Committee	●	●	●	●	If nominated by Sponsor or Full Member
Access to position papers and reports	●	●	●	●	●
AGM voting privileges	6 votes	6 votes	3 votes	3 votes	1 vote

GENERAL INFORMATION

Registered address: Eastgate Office Park, Block A, South Boulevard Road, Bruma, Johannesburg, 2198 South Africa

Email address: info@sapvia.co.za


NPO Number: 129-644 NPO

Bankers: First National Bank (FNB)

Auditors: BVA Audit and Assurance

BEE Level:

Social Media:

 linkedin.com/company/south-african-photovoltaic-industry-association

 x.com/SAPVIA

 web.facebook.com/sapvia.co.za