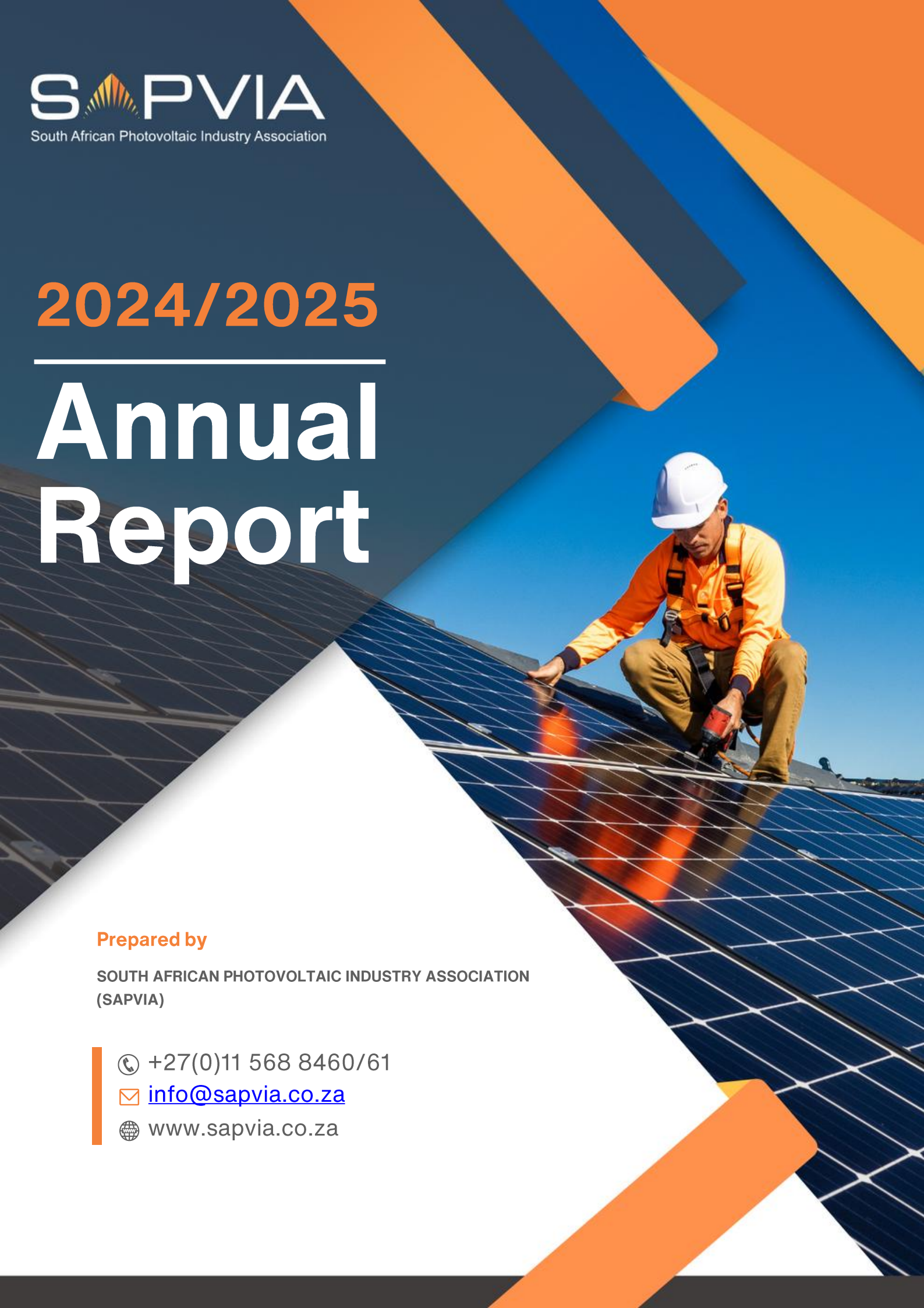
SAPVIA
South African Photovoltaic Industry Association

2024/2025

Annual Report



Prepared by

SOUTH AFRICAN PHOTOVOLTAIC INDUSTRY ASSOCIATION (SAPVIA)

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SAPVIA

South African Photovoltaic Industry Association

The Association's Information

Registered name: The South African Photovoltaic Industry Association (SAPVIA)

Registration number: 129-644 NPO

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Report Preamble

The 2024/2025 period brought significant positive developments for the South African Photovoltaic Industry Association (SAPVIA), reinforcing our commitment to championing the growth and sustainability of the solar PV sector. Amid evolving energy policies, regulatory shifts, and increasing demand for renewable energy, SAPVIA remained steadfast in its commitment to driving industry excellence, advocating for a just energy transition, and fostering innovation.

This annual report highlights our collective achievements, challenges, and milestones, reflecting our progress toward a resilient and sustainable energy future. It showcases our strategic initiatives, key partnerships, advocacy efforts, and SAPVIA's tangible impact on the renewable energy landscape.

Through policy engagements, market development, and capacity-building programs, SAPVIA has solidified its role as the leading voice for the solar PV industry.

We extend our heartfelt gratitude to our members, industry stakeholders, and partners—your invaluable support and collaboration advance the solar PV industry and accelerate South Africa’s energy transition.

Together, we are shaping a brighter, more sustainable future.

Celebrating
15 Years of Impact

CHAIRMAN'S Foreword

South Africa Solar Development 2024

As we reflect on the progress achieved in South Africa's solar energy sector, I am proud to highlight the remarkable strides made towards a sustainable and resilient energy future. This year marks a significant milestone, with the commissioning of several large-scale solar projects substantially contributing to the country's renewable energy capacity, supporting both economic growth and environmental stewardship.

"I am proud to highlight the remarkable strides made towards a sustainable and resilient energy future."

Highlights include the successful deployment of over 2 GW of new solar capacity, increased private sector investment, and the integration of innovative technologies like battery storage, enhancing grid stability and energy security. These developments underscore South Africa's commitment to diversifying its energy mix and reducing fossil fuel reliance.

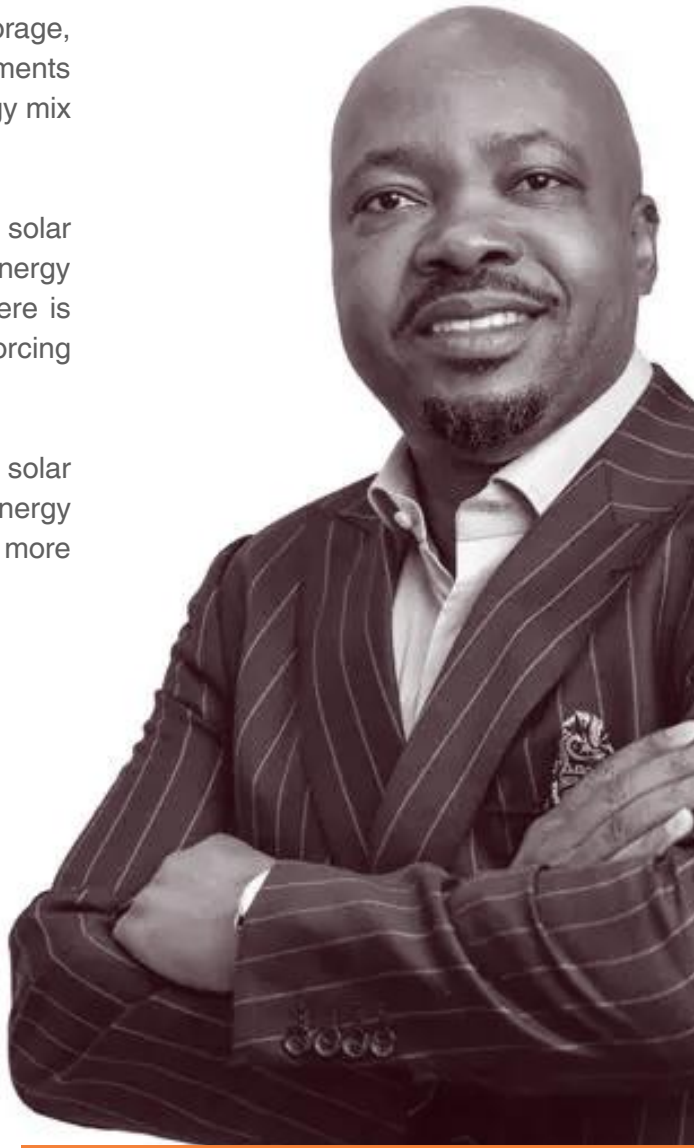
The opportunities ahead are vast. The abundance of solar resources presents a unique advantage for domestic energy production, job creation, and local industry development. There is also considerable potential for regional solar exports, reinforcing South Africa's role as a renewable energy hub in Africa.

Over the past 18 months, South Africa has seen landmark solar energy developments and significant updates to renewable energy regulations, shaping the country's transition toward a more sustainable energy future.

Here's an overview of key milestones:

Landmark Solar Developments
Several large-scale solar PV projects have been completed and integrated into the national grid, including projects under the Renewable Energy Independent Power Producer Procurement Programme (REIPPP). Notable examples include the 100 MW Nxuba Solar Power Project and other projects contributing hundreds of megawatts to South Africa's renewable capacity.

Private Sector Participation and Investment
The sector has seen increased participation from independent power producers (IPPs), with private investments totaling billions of rand. New solar farms are being developed across different provinces, particularly in the Northern Cape, Free State and Limpopo, leveraging South Africa's abundant sunlight.



Norman Moyo
SAPVIA Chairperson

Grid Modernisation and Storage Integration
Several projects have integrated battery storage solutions to improve grid stability, mitigate intermittency issues, and enable more reliable renewable energy supply. This marks a significant step toward a more resilient power system.

South Africa's First Utility-Scale PV and Hybrid Projects:
The launch of hybrid projects combining solar with wind or storage has expanded the renewable energy portfolio, demonstrating innovative approaches to optimize generation and supply.

Future of solar energy in South Africa is bright

Key Renewable Energy Regulations and Policy Updates

Renewable Energy Roadmap and Integrated Resource Plan (IRP) 2019-2030 Updates:

Although the IRP was initially published in 2019, updates and reviews over the past 18 months have reaffirmed commitments to expanding renewable capacity, including solar, wind, and other clean sources. The IRP emphasizes increasing renewable share to meet climate commitments and energy security goals.

Renewable Energy Independent Power Producer Procurement Programme (REIPPPP) Reinvigoration:

The government has expanded the REIPPPP, with new bidding rounds announced, encouraging more private investment and competition in solar power procurement.

Renewable Energy Policy for Off-Grid and Rural Electrification:

Policies have been enhanced to promote solar mini-grids and off-grid solutions in rural areas, improving access to electricity and supporting socio-economic development.

Introduction of Embedded Generation Regulations (2021 & 2023):

These regulations facilitate small-scale and distributed renewable energy projects by simplifying licensing procedures, enabling businesses and communities to generate their own power and feed excess energy back into the grid.

Carbon Tax and Emission Reduction Commitments:

South Africa's commitment to reducing greenhouse gas emissions has led to regulatory frameworks aimed at incentivizing renewable energy adoption and carefully phasing out coal dependency over time.

However, challenges remain. The sector faces hurdles related to policy consistency, financing of residential systems, grid infrastructure constraints, and effective socio-economic interventions. Addressing these obstacles will require continued collaboration between government, industry stakeholders, and communities to ensure inclusive and sustainable growth.

Looking forward, the future of solar energy in South Africa is bright. With ongoing technological advancements, supportive policies, and a shared vision for a greener economy, we are confident that solar will play a pivotal role in powering South Africa's sustainable development for years to come.

On behalf of SAPVIA , I reaffirm our commitment to advancing solar innovation and fostering partnerships that will unlock the full potential of renewable energy for South Africa's prosperity.

Norman Moyo
Chairperson

CEO'S Message

South Africa Solar Development 2024

This year marks 15 years since the establishment of SAPVIA, born from the bold vision of a small group determined to unlock the potential of solar energy. What began at the fringes of rural electricity supply has grown into a core pillar of South Africa's energy future with thousands of active industry partcipants.

Today, we proudly reflect on what has been achieved through collective effort and shared purpose.

15 Years of Impact

Over the past decade and a half, our sector has driven transformation at scale:

- 9 GW of installed solar PV capacity, enough to power over 3.6 million homes
- 14 GW of private genaration registered with NERSA, 9.9 GW of whic
- Thousands of installers trained and certified through SAPVIA's PV GreenCard since 2017, ensuring quality and safety of small-scale embedded generation (SSEG) projects
- 50% reduction in licensing timelines in three provinces through sustained regulatory engagement
- Loadshedding mitigation through record solar installations during peak energy crises
- Significant job creation and the growth of SMMEs across the value chain.

These milestones are more than statistics—they represent homes lit, businesses supported, and investment attracted. They demonstrate that solar energy delivers both energy security and economic opportunity.

Private Sector Participation and Investment

The Present Opportunity

The 2024/2025 period is pivotal. Solar PV now stands at the heart of South Africa's energy transition.

On the policy front, SAPVIA has actively contributed to the development of the South African Renewable Energy Masterplan (SAREM), the Integrated Resource Plan (IRP), and the South African Wholesale Electricity Market (SAWEM). Our input is shaping the frameworks that will define the future of energy in South Africa.

Dr Rethabile Melamu

SAPVIA Chief Executive Officer

Through the South African Renewable Energy Grid Survey (SAREGS), we are helping inform critical infrastructure planning. Our work with municipalities is fostering more consistent approaches to Small-Scale Embedded Generation (SSEG), making it easier for households and businesses to adopt solar.

The PV GreenCard remains the benchmark for quality, providing consumer confidence and protecting the industry's integrity. Our skills development initiatives continue to advance transformation—40% of newly certified installers now come from previously disadvantaged communities.

Keys to the Future

Looking ahead, SAPVIA's strategic focus will build on strong foundations:

- **Policy certainty:** Work with government and business stakeholders to conclude the IRP and contribute to the development of the Integrated Energy Plan (IEP).
- **Skills & enterprise development:** Expand PV GreenCard training with a focus on rural areas provinces
- **Market liberalisation & policy implementation:** Support the finalisation of SAWEM and the national wheeling framework to unlock over private investment and improve grid stability.
- **Industrial development:** Support the implementation of SAREM, prioritising PV components that can significantly contribute to job creation and strengthening supply chains i

Our partnerships remain central to our success, both locally, across the African continent and internationally We are proud to be part of the German-funded Renewable Associations project, strengthening collaboration with global peers like BSW and contributing to the Global Solar Council. In the next year, we will continue to foster closer ties with fellow industry associations across the continent.

A Collective Achievement

To our members: your dedication has driven our progress. From informing policy to leading on-the-ground implementation—your work has made a difference.

To our government partners: DMRE, NERSA, IPPO, SAREM, ITAC, and others, thank you for your collaboration in shaping a more resilient, sustainable energy landscape.

The next chapter of solar energy will not be written by any one organisation, but through the continued collaboration that has brought us this far. With the foundations we've laid and the partnerships we've built, I am confident that solar PV will remain central to South Africa's sustainable and prosperous future.

Dr Rethabile Melamu
Chief Executive Office

SAPVIA

South African Photovoltaic Industry Association

SAPVIA Overview

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 over 700 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.

Vision

For solar PV to be a significant and reliable contributor to the South African electricity mix; by 2050, there is:

- Energy Security, solar PV is used as an infinite daily energy resource
- Policy and Market Alignment, where clear laws and policies complement one another, and public-private partnerships enable the growth of the solar market, and
- Environmental & Market Sustainability through decarbonized energy and creation of economic development opportunities

Mission

As the voice of the solar PV industry in South Africa, our 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 walk with our stakeholders,
so we can walk further,
together.

The SAPVIA

GOVERNING COMMITTEE

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 by being part of Econet Wireless Zimbabwe team. Thereafter he moved to Celtel International as Commercial Director in Zambia before landing the job of Chief Marketing Officer in Nigeria.

Devilliers Botha - Deputy Chairperson

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.

Mtho Xulu - Treasurer

Adv. Mtho Xulu holds LLB and LLM degrees from UNISA, specialising in Commercial Law and Corporate Governance. Admitted as an Advocate of the High Court in 2011, he is a prominent business leader. He serves as CEO of Nashua Mpumalanga Group, President of SACCI, and sits on several boards including SAPVIA, the Bombela Concession Company, and the South African Statistics Council. He also chairs the BRICS Business Council Trade and Investment Working Group and is a member of the IoDSA. His past roles include board memberships at SEDA and BUSA.

Frank Spencer - Spokesperson

Frank Spencer is a well-known Renewable Energy personality in the South African Renewable Energy Space. He currently heads up Cainmani's South Africa business, where he leads on the development of Greenfield Utility-Scale Renewables Power Projects for Private Sector offtake. With a Master's Engineering degree in Electrical Engineering and a Philosophy degree in Sustainable development, he is passionate about addressing the multi-faceted challenges of Climate Change, Electrification and SED in Africa, as well as the electricity challenges closer to home in South Africa.

AntjeKlauss-Vorreiter - Deputy Spokesperson

Antje has a comprehensive German engineering education. Her professional life has been focused on environmental engineering and, for the last 20 years, on renewable energy. She has more than 25 years of professional experience as a project manager, training developer and trainer in the field of environmental engineering and renewable energy. In 2019, together with Vivian Blümel, she founded the GREEN Solar Academy as a spin-off of Maxx Solar Energy.

The SAPVIA

GOVERNING COMMITTEE

Jonathan Frick - Deputy Spokesperson

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 with developers, lenders, investors, government stakeholders and suppliers.

Claude Peters - Commissioner

Claude is an accomplished director and experienced shareholder of commercial entities in both South Africa and the United Kingdom. Drawing from a wide scope of leadership and business development experience, Claude's focus remains the continued and sustainable development of clean energy. Born and bred in the Free State, Claude spent 16 years managing businesses across Europe. His renewable energy journey began in 2011 in Cambridge, later partnering with RenEnergy UK, established in 2006.

Nicola Cencelli - Commissioner

Nicola Cencelli is a seasoned energy professional with 18 years' experience spanning Eskom hydro operations, consultancy, project development, and utility-scale wind and solar construction. Known for her technical expertise, strategic vision, and creativity, she currently serves as Senior Business Development Manager at JUWI Renewable Energies. Nicola holds undergraduate and master's degrees in mechanical engineering from the University of Stellenbosch. Her deep industry knowledge and leadership make her a strong asset to the SAPVIA board and its stakeholders.

Khotso Selokoma - Commissioner

Khotso leads stakeholder relations at SOLA, engaging with regulators, municipalities, JV partners, government, and communities. With a strong grasp of renewable energy policy and technical systems, he has played a key role in securing grid connection approvals and NERSA licenses over the past 3.5 years. He has also supported municipalities in developing embedded generation policies and by-laws. Khotso brings valuable expertise in local government engagement, public relations, and community development strategy.

Mantwa Mathebula - Commissioner

Mantwa is a seasoned natural scientist with 16 years' experience in environmental permitting and business development in infrastructure and renewable energy. She heads Sustainability at Enel Green Power SA, having started as a Permitting Lead and later a Business Developer. Mantwa oversees environmental licensing from project inception to operation and is known for her passion for renewable energy, self-motivation, and results-driven approach in a dynamic energy landscape.

Our Strategic Pillars

Shape & Influence Regulations & Policy

- Advocate for updated Integrated Resource Plan (IRP) & Integrated Energy Plan (IEP) and any relevant legislations such as ERA
- Lobby for national wheeling framework to enable energy trading.
- Drive for a widespread municipal approval processes of Small-Scale Embedded Generation (SSEG).
- Strengthen PV Green Card (PVGC) authority and financial sustainability.
- Promote localisation of PV components and storage manufacturing.
- Implement sector codes and charters to drive inclusive industry growth.

Inform & Educate Members & Stakeholders

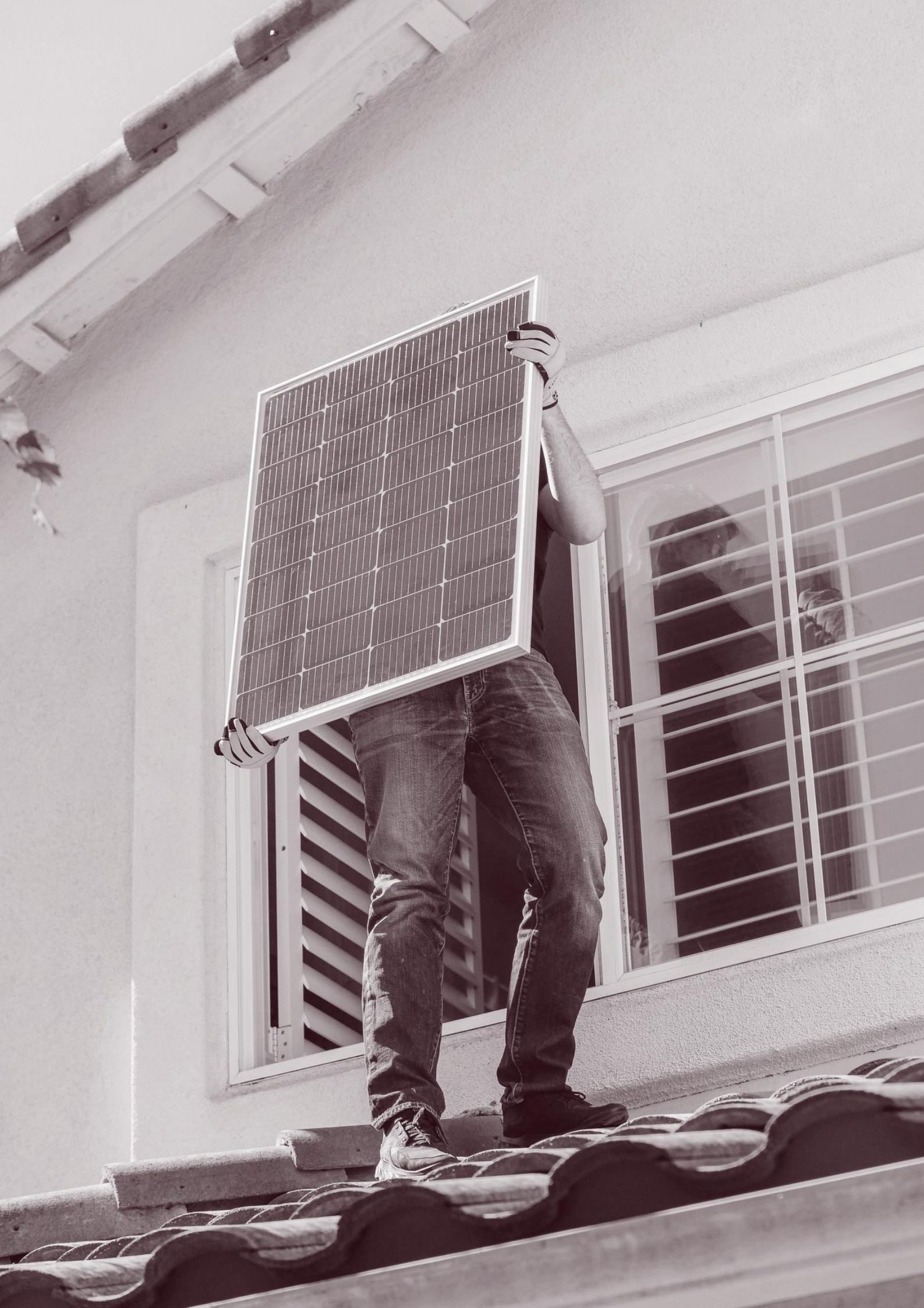
- Expand research and data collection on member needs and market trends
- Develop market intelligence reports as an alternative revenue stream
- Publish annual Solar PV Industry Reports for sector insights
- Transform SAPVIA into a centralized data portal for industry information
- Launch a complaint/escalation platform to address member challengesg

Facilitate Partnerships & Collaboration

- Implement a stakeholder engagement monitoring framework
- Align engagements with clear, needs-driven objectives
- Establish structured platforms for industry collaboration

Promote Solar PV Adoption

- Drive adherence to safety and quality standards across all installations
- Expand industry collaboration platforms for knowledge sharing
- Priority Actions: This year, we focus on delivering tangible progress through:
- Finalising critical policy frameworks for energy trading and small-scale generation
- Onboarding 5,000 installers to the enhanced PV Green Card system
- Establishing three public-private partnerships for local manufacturing



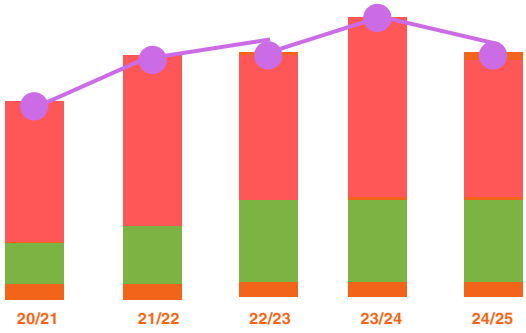
SAPVIA

South African Photovoltaic Industry Association

Membership Overview

Membership Growth & Development

Membership declined from 783 in the 2023/24 financial year to 701 in 2024/25. This overall reduction reflects broader industry trends, as the slowdown in solar uptake — from just over 2 GW to just over 1 GW year-on-year — has similarly affected membership growth.



Membership Growth

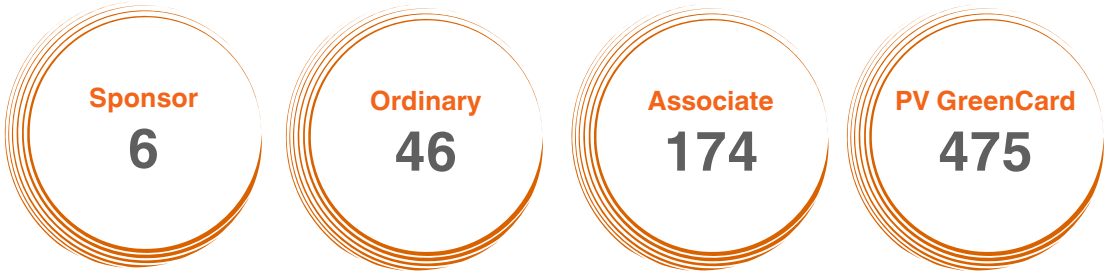
PV GreenCard	320	400	337	539	475
Associate	94	123	173	188	174
Full/Ordinary	36	40	50	50	46
Sponsor		1	2	6	6
Total	450	564	562	783	701

Several sector-specific headwinds contributed to this decline in both membership growth and retention:

Economic pressures: Businesses across the solar value chain — particularly small, medium, and micro enterprises (SMMEs) — faced significant financial strain and limited cash flow, which affected their ability to sustain and pay memberships subscription.

Reduced loadshedding-driven demand: A marked decrease in loadshedding incidents during the year led many corporate and residential consumers to delay or scale back solar investments. This decline in demand impacted companies across the value chain — especially installers, component suppliers, and service providers — many of whom experienced a slowdown in project pipelines and revenue growth.

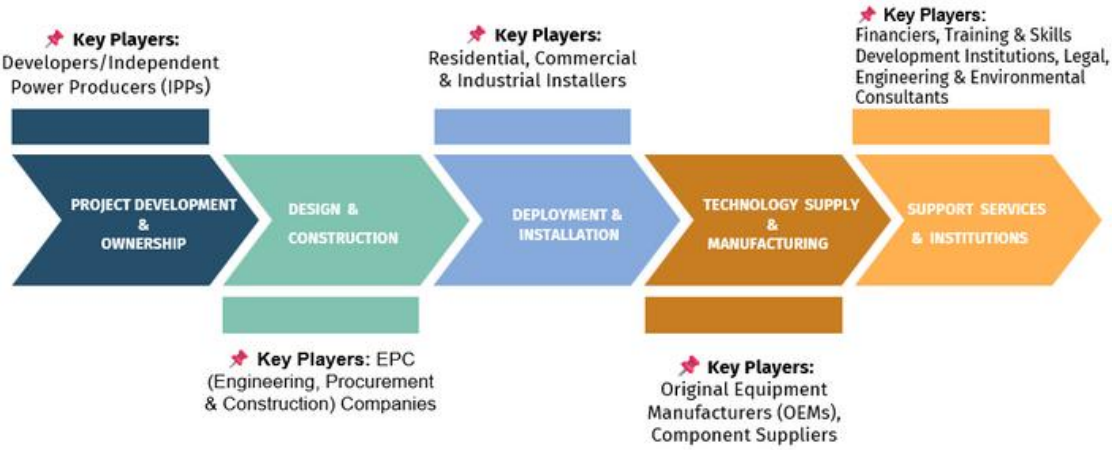
Members by Category



Membership Growth & Development

SAPVIA members include a wide variety of stakeholders across the solar PV value chain, reflecting the full ecosystem of the sector:

SAPVIA Membership Across the Solar PV Value Chain



Project Development & Ownership
Developers / IPPs: This segment represents a smaller portion of the membership, reflecting the capital-intensive nature of large-scale solar projects.

Design & Construction
EPCs (Engineering, Procurement & Construction) Companies: EPCs make up a modest percentage of SAPVIA's membership. This reflects the specialised nature of their work, where a limited number of larger companies oversee multiple projects, often partnering with local installers for on-the-ground execution.

Deployment & Installation
Installers – Residential, Commercial & Industrial: Installers constitute the majority of SAPVIA's membership, underscoring the sector's strong focus on deployment. This dominance highlights the decentralised, hands-on nature of the industry and the growing demand for skilled labour across residential, commercial, and industrial markets.

Technology Supply & Manufacturing
Manufacturers & Suppliers (OEMs): A smaller segment of the membership, this reflects the global nature of solar manufacturing.

Support Services & Institutions
Finance, Training, Advocacy, Research, Consultants & Professionals: This category includes a diverse range of members – from financiers and training institutions to advocacy bodies, legal experts, and engineers. While individually smaller, together they form a critical support ecosystem that enables policy, capacity building, and professional guidance across the solar value chain.

Events and Networking

SAPVIA's events and networking initiatives play a vital role in fostering collaboration, sharing knowledge, and driving the collective advancement of South Africa's solar PV sector. Through targeted engagements, we create platforms that bring together industry leaders, policymakers, financiers, developers, service providers, and other key stakeholders.

Throughout the year, SAPVIA hosted and participated in a variety of events designed to educate, engage, and empower our members:

Industry Conferences & Summits:

Between April 2024 and March 2025, SAPVIA participated in key industry events, including a strategic partnership and exhibition at Enlit Africa, as well as an active presence at Solar & Storage Live

Member Networking Sessions & Roundtables:

Between November and December 2024, SAPVIA hosted two in-person member networking sessions—one in Cape Town and another in Johannesburg. These sessions were designed to foster meaningful relationship-building, peer-to-peer learning and the exchange of industry insights. They also served as a valuable platform for promoting business development and identifying collaborative opportunities across the solar PV value chain..

Workshops & Technical Training Events:

Focused on capacity building, these sessions equipped members with the latest technical knowledge, regulatory updates, and best practices. Topics ranged from SSEG and utility-scale project development to ESG compliance, finance, and grid integration.

Stakeholder Engagements & Public Forums:

SAPVIA actively engaged with government departments, regulators, and industry partners through open forums and consultations. These platforms allowed members to voice concerns, influence policy, and stay informed on regulatory and legislative changes.

Our events not only strengthened the industry's collective voice but also positioned SAPVIA as a trusted convenor of credible, impactful dialogue. A full list of key events from the past year is included on the following page. Looking ahead, our events strategy will continue to prioritise member value, foster inclusivity, and expand our reach across the solar PV landscape.

The Electricity Wheeling Conference - 4 - 5 April 2024 - Cape Town (South Africa)

Enlit Africa – May 28 to May 30, 2024 – Cape Town (South Africa)

Intersolar Europe – 19-21 June 2024 – Munich (Germany)

BUSA and NAFBI Workshop – 26 November 2024 – Johannesburg (South Africa)

2024 Gauteng Climate Change Indaba – 27 November 2024 – Johannesburg (South Africa)

C&I Energy Storage Summit (Panel: Optimising the energy mix) – 19 – 20 November 2024 – Johannesburg (South Africa)

SANEA inaugural leadership conference – 6 - 7 November 2024 – Johannesburg (South Africa)

6th Annual Coal & Energy Transition Day - 23 July 2024 – Johannesburg (South Africa)

Inaugural Atlantis SEZ Women in Greentech Round Table Breakfast – 30 August 2024 – Cape Town (South Africa)

AOW: Investing in African Energy – 7-10 October 2024 – Cape Town (South Africa)

Doug Banks Renewable Energy Vision (DBREV) and SANEA NPC – 09 October 2024 – Cape Town (South Africa)

Africa Energy Indaba - 4 - 6 March 2025 - Cape Town (South Africa)

Intersolar Summit Africa – 12 – 13 March 2025 – Nairobi (Kenya)

Berlin Energy Transition Dialogue – 18 – 19 March 2025 – Berlin (Germany)

The Solar & Storage Live Africa - 25 - 27 March 2025 - Johannesburg (South Africa)

SAPVIA

South African Photovoltaic Industry Association

SAPVIA's Operational Report

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State of the Industry Challenges

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Reflections on key strategic interventions

-Shaping & Influencing Regulations and Policy Development
-Informing and Educating Members and other stakeholders
- Facilitating Partnership and Collaborations
- Promoting higher usage of Solar PV in the public and private sectors

The state of South Africa's Solar PV Industry

South Africa remains the largest solar PV market on the African continent, demonstrating leadership in driving renewable energy adoption across the region. However, Africa's contribution to global solar PV growth remains small, accounting for only 0.5%.

Installed solar PV capacity

In 2024, South Africa's total installed solar photovoltaic (PV) capacity grew by 11.9%, reaching 8.97 GW. This included 2.8 GW from public procurement programmes and 6.1 GW from private-sector projects, reflecting strong growth in decentralised energy generation. An additional 375 MW is expected to be added in 2025. By October 2024, the private sector alone had contributed 961 MW, underscoring the sector's resilience in the face of regulatory delays, grid connection backlogs, and limited financing access for SMEs. Nearly 500 MW of utility-scale projects were under construction, pointing to a positive outlook for the sector. SAPVIA anticipates continued growth in solar-plus-storage systems and microgrids.

Key Procurement Programmes and Storage

The REIPPPP (Renewable Energy Independent Power Producer Procurement Programme) remains central, allocating 5.5 GW of solar PV across seven rounds by December 2024. This programme has significantly reduced costs and shows a trend towards solar-plus-storage hybrid projects. While the REIPPPP aims for local content, inconsistent enforcement and policy uncertainty hinder full localization.

Bid Window	Capacity (MW)	Energy (MWh)	Status
Bid Window 1	360 MW	1,440 MWh	Commercial close in late 2024
Bid Window 2	615 MW	2,460 MWh	Preferred bidders announced (Dec 2024)
Bid Window 3	616 MW	2,464 MWh	Preferred bidders announced (30 May 2025)

Local Manufacturing

The notable milestone for local manufacturing in the previous year has been the adoption of the South African Renewable Energy Masterplan (SAREM) by cabinet. SAREM is a social compact between, industry and other social partners

SAREM provides a strategic roadmap to support industrialisation and inclusive economic growth by strengthening local manufacturing capacity in the renewable energy sector, particularly solar PV.

While the introduction of a 10% import duty and rebate on PV modules aimed to stimulate local manufacturing, its effectiveness has been limited due to the mismatch between current local production capacity and growing market demand.

Employment and Socio-Economic Impact

The solar PV industry is also emerging as a powerful economic catalyst, driving job creation and skills development initiatives. For example, SAPVIA's collaboration with the National Business Initiative and Absa helped train 100 solar installation companies to meet surging demand. Notably, the Operation and Maintenance (O&M) segment is emerging as a high-value employment area, offering sustained local job creation as South Africa's installed PV base continues to grow and age.

Looking ahead, solar technologies hold significant employment potential. Under a solar PV and Concentrated Solar Power (CSP) are projected to deliver the largest share of renewable energy jobs—with an estimated 245,000 jobs by 2030 and 2050, respectively. This underscores the strategic role of solar in advancing South Africa's just energy transition and inclusive economic development.

Challenges Specific to the Solar Industry

Despite its rapid growth and immense potential, the solar PV industry in South Africa continues to face a range of structural and systemic challenges that could hinder further progress if not addressed:

Grid Constraints

South Africa's national grid infrastructure remains a major bottleneck, especially in regions with high solar resource availability. Grid access limitations are delaying new connections and project rollouts. Eskom has begun exploring curtailment strategies temporarily reducing generator output as a short-term congestion relief measure. However, long-term investment in grid infrastructure remains critical to unlocking new capacity and enabling broader market participation. he TDP 2024 provides a crucial framework for overcoming grid constraints, identifying the need for 14,500 km of new transmission lines over the next decade.

Policy and Regulatory Uncertainty

While recent reforms have boosted private-sector participation, policy uncertainty remains especially in areas such as licensing, municipal integration, and localisation obligations. These ambiguities create an unpredictable environment for investors and developers, slowing momentum and complicating project planning.

Municipal Capacity and Inconsistent Rules

Many municipalities lack the internal capacity and frameworks needed to manage complex mechanisms such as wheeling—the transfer of energy across the grid. Additionally, small-scale embedded generation (SSEG) tariffs and wheeling rules vary significantly between jurisdictions, causing confusion and delays for both developers and customers. A harmonised national framework would provide much-needed clarity and consistency.

Manufacturing Competitiveness and Market Perception

Local manufacturers face cost and scale disadvantages compared to international suppliers, particularly from Asia. Negative perceptions persist regarding the quality, reliability, and certification of locally produced components, which limits their uptake. Targeted interventions such as third-party certification and government-backed quality assurance can help address these concerns and build confidence in South African-made products.

Underdeveloped Regulatory Environment for Energy Storage

For behind-the-meter (BTM) lithium-ion battery systems, the regulatory landscape remains underdeveloped, with significant gaps in safety standards, installation protocols, and certification processes. As storage becomes central to energy resilience and self-consumption, clear technical regulations and guidance are urgently needed.

Skills Shortages

The rapid expansion of the solar sector has outpaced the availability of skilled labour. There is a pressing need to train battery technicians, PV installers, engineers, and site workers. Developing strong training pipelines through vocational education, industry partnerships, and certification programs will be critical to sustaining growth.

Financing and Access to Capital

High upfront costs and limited access to financing continue to constrain adoption, particularly for small businesses, municipalities, and residential customers. Financial innovation such as green banks, concessional lending, and aggregation models could help unlock broader participation and accelerate deployment.

SAPVIA

South African Photovoltaic Industry Association

Shape and Influence Regulations and Policy Development

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Regulatory Frameworks

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Policy & Advocacy Engagements

- Integrated Resource Plan (IRP)
- Parliamentary Portfolio Committee
- International Trade Administration Commission (ITAC)
- South African Renewable Energy Masterplan
- South African Wholesale Electricity Market
- Electricity Regulation Amendment (ERA) Act

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PV Greencard

Strengthening Regulatory Frameworks Across Market Segments

SAPVIA's advocacy efforts span all major market segments—utility-scale, commercial, industrial, and domestic. A central focus has been the development of a harmonised, national regulatory framework for Small-Scale Embedded Generation (SSEG) and Battery Energy Storage Systems (BESS). SAPVIA believes that such a framework is vital to addressing South Africa's energy trilemma of security, affordability, and sustainability.

Advancing Equitable Grid Access and Infrastructure Reform.

SAPVIA continues to advocate for equitable, transparent, and rules-based access to grid infrastructure. The Association supports efforts to build the capacity of both Eskom's Grid Access Unit and the National Energy

Regulator of South Africa (NERSA) to ensure consistent and fair grid connection processes.

During the period under review, SAPVIA collected industry feedback on the Interim Grid Capacity Allocation Rules (IGCAR) and actively engaged stakeholders to address inconsistencies and clarify interim procedures. This work is essential to unlock new project development and facilitate the timely integration of solar PV capacity into the national grid.

Policy & Advocacy Engagements

Influencing the Integrated Resource Plan (IRP) and National Energy Policy

The Integrated Resource Plan (IRP) is South Africa's official policy framework that defines the trajectory for electricity generation and capacity expansion. As a forward-looking and indicative document, the IRP reflects government priorities and plays a pivotal role in shaping the national energy landscape.

Recognising its strategic importance, SAPVIA prioritised influencing the revision of IRP 2019 as a core pillar of its advocacy agenda during the reporting period. Government has acknowledged the need to update the IRP, and SAPVIA actively contributed to this process through structured stakeholder engagements and data-driven policy submissions.

In November 2023, SAPVIA published an updated study on the South African solar PV manufacturing value chain, building on its foundational 2022 research. This body of work provides a comprehensive, evidence-based assessment of the local industry's capabilities and growth potential. It informs both public policy and private sector investment decisions, ensuring recommendations are rooted in industry realities.

A key policy recommendation by SAPVIA is the integration of industrial policy within the revised IRP. Specifically, the Association advocates for the annual procurement of at least 2 GW of solar PV capacity. SAPVIA's research underscores the importance of aligning localisation and local content policies with empirical data—ensuring that industrial development goals are both feasible and impactful. This targeted approach promotes greater policy coherence and supports the growth of a competitive and sustainable local solar PV manufacturing sector.

SAPVIA's Advocacy at the Portfolio Committee on Electricity and Energy

On 13 November 2024, the SAPVIA presented to the Parliamentary Portfolio Committee on Electricity and Energy, highlighting urgent challenges and opportunities in the Small-Scale Embedded Generation (SSEG) market.


CREAMER MEDIA'S ENGINEERING NEWS

SAPVIA calls for incentives for SSEG market

SAPVIA CEO Dr Rethabile Melamu

The presentation addressed a significant decline estimated at 60–80% in residential solar PV installations following the suspension of load-shedding and raised concerns around low registration and compliance rates across municipalities.

SAPVIA called for targeted incentives such as tax benefits and grants for middle-income households to reignite market demand. The association also advocated for the development of a national online registration portal to standardize compliance and streamline system registration.


CREAMER MEDIA'S ENGINEERING NEWS

Industry organisation the South African Photovoltaic Industry Association (SAPVIA) has made a presentation to Parliament's Portfolio Committee on Electricity and Energy in which it called for solar investment incentives that offer tax benefits and grants for installations, specifically targeting middle-income households.

"We believe a national small-scale embedded generation (SSEG) framework will help standardise system registration and compliance across municipalities," said SAPVIA CEO Dr Rethabile Melamu.

Additionally, SAPVIA raised concerns regarding the 10% import duty on PV modules introduced in July 2024, particularly the lack of consultation and the administrative inefficiencies in the rebate process.

SAPVIA reiterated its support for local manufacturing growth through realistic localisation policies aligned with the SAREM and emphasised the need for policy clarity to unlock the full potential of solar PV in supporting energy security and economic development.

International Trade Administration Commission Engagement

In response to ITAC's Notice 3142/2025 which proposed a comprehensive tariff review across key renewable energy components SAPVIA coordinated a consolidated industry submission on 5 June 2025.

Drawing from member input and previous localisation research, the submission provides:

- Evidence-based proposals on tariff structures, rebate mechanisms, and local content thresholds aligned with actual domestic capabilities and market dynamics.
- Highlighted concerns over the lack of alignment with national strategies, such as SAREM, the IRP, and South Africa's climate commitments.
- Emphasised that most job creation occurs in installation and deployment, not through automated manufacturing of panels.
- Called for industry engagement and rigorous value chain analysis before imposing new duties, to ensure tariffs effectively support localisation without undermining deployment and affordability.


ANNOUNCEMENTS / MEMBER NEWS

SAPVIA's Submission to ITAC on Tariff Review

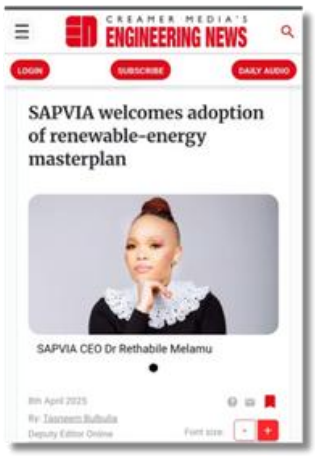
Dear Members,

Following the recent publication of Notice 3142 of 2025 by the International Trade Administration Commission (ITAC) regarding the proposed review of tariffs on input materials, components, and final products used in the renewable energy value chain, SAPVIA reached out to its members and key stakeholders to gather comments and insights.

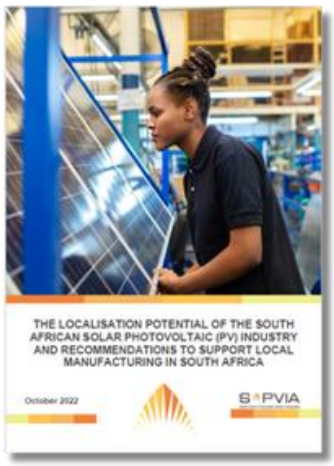
This coordinated effort underscores SAPVIA's role as a proactive industry partner seeking to shape trade policy in a manner that balances industrial development, energy security, and market growth.

Informing and Supporting the Renewable Energy Masterplan

A major milestone was Cabinet's adoption of the South African Renewable Energy Masterplan on 28 March 2025. SAPVIA, having advised on its development, welcomed SAREM's focus on inclusive value-chain growth, industrial capacity, and skills development through tools like a sector-specific B-BBEE scorecard.



SAPVIA actively participated in shaping SAREM, engaging in consultations and providing technical input on localisation, industrial capacity, and value chain development.

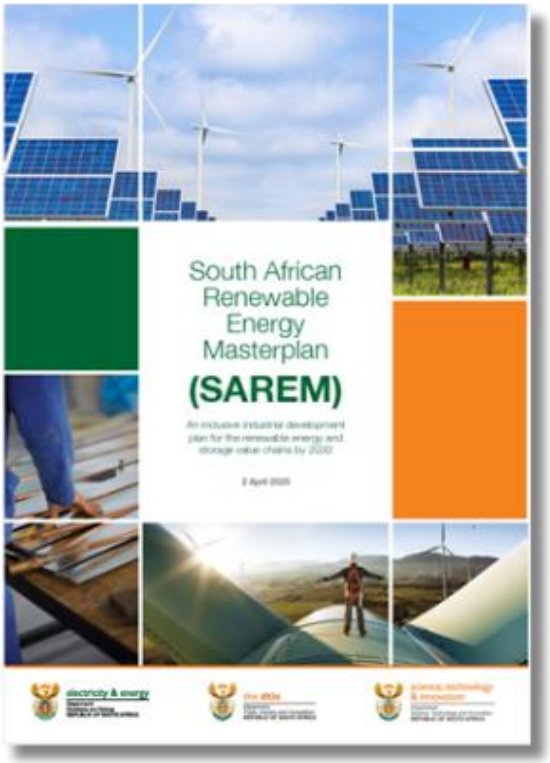


As a key industry representative, SAPVIA has contributed strategic input through policy advice, stakeholder coordination, and evidence-based research to ensure that SAREM reflects the needs and realities of the solar PV sector.

Both studies underpin SAREM's key goals; boosting local demand, fostering inclusive development, and building capabilities for long-term energy resilience and economic growth.

Evidence-Based Contributions

Study 1: "State of South African Manufacturing and Resources for PV Value Chains" - mapped local manufacturing capacity, gaps, and investment needs.



Study 2: "Localisation Potential of the South African Solar PV Industry" – modelled job creation, market impact, and provided actionable recommendations.

The Electricity Regulation Amendment (ERA) Act

SAPVIA welcomed the ERA Act during the State of the Nation Address, echoing President Ramaphosa's support for a competitive wholesale electricity market and transmission investment.

The Association recommended accelerating the rollout of private sector participation, establishing a competitive wholesale electricity market, and expanding grid infrastructure to support renewable energy uptake. SAPVIA also underscored the importance of embedding skills development and localisation measures particularly in the solar PV industry to ensure the Act delivers inclusive growth and maximises the economic and environmental benefits of a reformed electricity sector.


energize

Energy stakeholders welcome SONA reforms but urge swift action on implementation

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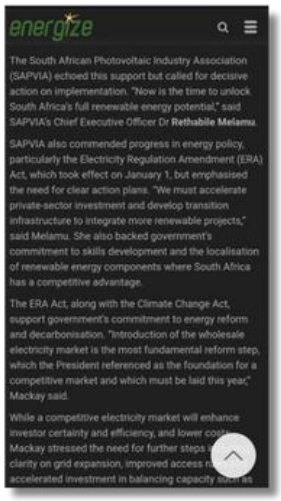
South Africa's energy sector stakeholders have – for the most part – welcomed reforms announced in the State of the Nation Address (SONA) delivered by President **Cyril Ramaphosa** last Thursday (February 6) in Cape


energize

The South African Photovoltaic Industry Association (SAPVIA) echoed this support but called for decisive action on implementation. "Now is the time to unlock South Africa's full renewable energy potential," said SAPVIA's Chief Executive Officer Dr **Rethabile Melamu**.

SAPVIA also commended progress in energy policy, particularly the Electricity Regulation Amendment (ERA) Act, which took effect on January 1, but emphasised the need for clear action plans. "We must accelerate private-sector investment and develop transition infrastructure to integrate more renewable projects," said Melamu. She also backed government's commitment to skills development and the localisation of renewable energy components where South Africa has a competitive advantage.

The ERA Act, along with the Climate Change Act, support government's commitment to energy reform and decarbonisation. "Introduction of the wholesale electricity market is the most fundamental reform step, which the President referenced as the foundation for a competitive market and which must be laid this year," Mackay said.

While a competitive electricity market will enhance investor certainty and efficiency, and lower cost

Mackay stressed the need for further steps

clarity on grid expansion, improved access

accelerated investment in balancing capacity such as

SAWEM Code Evaluation

SAPVIA reviewed the draft SAWEM Code and proposed key improvements to enhance solar PV participation. Recommendations included introducing sub-hourly settlement systems, designing an ancillary services market, and refining network tariff models to better support distributed generators. SAPVIA also advocated for greater demand-side flexibility, forward market design, and mechanisms to ensure revenue certainty for solar projects—ensuring a fair, inclusive, and solar-ready electricity market.


SAPVIA

South African Photovoltaic Industry Association

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DRAFT

Date: 21 October 2024

SUBJECT: Evaluation of SAWEM Code and Suggested Improvements for High Solar PV Penetration

SAPVIA

South African Photovoltaic Industry Association

PV GreenCard

32

PV Greencard 2.0

33 & 34

Training & Accreditation

PV GreenCard 2.0: Renewing the Standard for Quality and Skills

This year's PV GreenCard (PVGC) programme activities were anchored in the continued rollout of PV GreenCard 2.0, a set of strategic interventions aimed at revitalising the programme's relevance and impact in the Small-Scale Embedded Generation (SSEG) space.

Building on the foundation laid in the previous financial year, the initiative focused on re-establishing the PV GreenCard as the industry's leading private-sector-driven quality assurance and skills development standard for solar PV in South Africa. **The following key developments were implemented:**

Trademark Registrations: As part of our ongoing efforts to strengthen and protect the PV GreenCard brand, SAPVIA has initiated the process of trademark registration for both the PVGC logo and word mark. Legal counsel has been appointed to guide and manage the application process, which is scheduled to formally commence in the next financial year. This strategic move aims to enhance brand recognition, ownership, and credibility.

Elevating Installer Standards – Training and Professionalisation: SAPVIA has actively contributed to industry-wide efforts to professionalise solar PV installation standards. We have engaged in the PV Professionalisation Committee led by GreenCape and contributed to the ECA Think Tank, a key technical forum that supports continuous improvement of installer competencies.

Digital Tools – PVGC Mobile App Launch: On 31 October 2024, we launched the PVGC Mobile App to improve usability for installers in the field. The app enables real-time reporting and documentation of PVGC-compliant installations directly from the installation site, further streamlining quality assurance and compliance processes.

SSEG Registration Process: To support public understanding of solar PV installation guidelines, we published a document detailing the full process for registering a Small-Scale Embedded Generation (SSEG) system. It also clearly outlines the responsibilities of each stakeholder involved, including the homeowner, installation company, and the relevant authority such as the local council or Eskom.


SAPVIA

Small Scale Embedded Generation (SSEG) Registration Process

For Eskom and Municipal Connected Customers

Understanding SSEG – What It Is and Who Needs to Register

Important Definitions

SSEG

Embedded Generation

Off-Grid Installation

Distributor

Prosumer

NERSA

Legal and Regulatory Framework

Training & Accreditation Statistics

The PV GreenCard Programme maintained a strong national presence in 2024/25 through a network of 12 registered and endorsed Training and/or Assessment Centres operating across several provinces and municipalities. Collectively, this network includes 19 training centres and 13 assessment centres, providing widespread access to accredited solar PV installer training and evaluation services.

These centres are located across key metropolitan and district municipalities, including the City of Johannesburg, City of Tshwane, Ekurhuleni, eThekwini, City of Cape Town, Nelson Mandela Bay, Buffalo City, Mangaung, Dr Kenneth Kaunda, King Cetshwayo, and Bojanala Platinum. This wide distribution supports skills development in both high-demand urban markets and underserved regions.

Training/Assessment Centre	Province	Location(s)- City	Municipality
Nepoworx	Gauteng	Johannesburg	City pf Johannesburg Metro.
Green Solar Academy	Western Cape, Eastern Cape, Gauteng, KwaZulu Natal, Gauteng	Cape Town, Gqeberha/Port Elizabeth, Johannesburg, Durban, Pretoria	City of Cape Town, Nelson Mandela Bay Metro, City of Johannesburg Metro, Ethekwaine Metro, City of Tshwane Metro.
GC Solar	Gauteng, Western Cape	Johannesburg, Cape Town	City pf Johannesburg Metro. City of Cape Town Metro.
Skills Proficiency	Eastern Cape	East London	Buffalo City Metro.
Noltrix Pty Ltd	Gauteng	Pretoria	City of Tshwana Metro.
PowerPro	Gauteng	Nigel	Ekurhuleni Metro.
Smart Energy and Technology Solutions t/a KZN IEETR (DUT)	KwaZulu Natal	Durban	eThekwini Metro.
Med-Tech Engineers	Gauteng	Pretoria	City of Tshwana Metro.
Solana Training Academy (Pty0 Ltd	KwaZulu Natal	Richards Bay	King Cetshwayo Dist.
CS Electrical Training Centre	Free State	Bloemfontein	Mangaung Metro
SunCybernetics	Northwest. Gaiteng, Free State	Potchefstroom, Johannesburg, Bloemfontein	Dr Kenneth Kaunda Dit, Ekurhuleni Metro, Mangaung Metro
Infinix Training Center	Northwest	Rustenburg	Bojanala Platinum Dist

PV Greencard Endorsed Training and/or Assessment Centres

The endorsed Training and/or Assessment Centres include reputable providers such as Nepoworx, GREEN Solar Academy, GC Solar, Skills Proficiency, Noltrix (Pty) Ltd, PowerPro, Smart Energy & Technology Solutions t/a IEETR (DUT), Med-Tech Engineers, Solana Training Academy, CS Electrical Training Centre, SunCybernetics, and Infinix Training Center. These institutions play a critical role in delivering quality solar PV training aligned with national standards and the PV GreenCard programme's quality assurance objectives.

However, several provinces and municipalities especially in rural and under-resourced areas still lack access to training or assessment centres. Addressing this gap remains a priority. The PV GreenCard Programme is actively expanding its reach through strategic partnerships and outreach efforts aimed at establishing new centres and providing mobile or regional training interventions in underserved regions.

PVGreenCard

These initiatives reflect SAPVIA's ongoing commitment to inclusivity, equitable skills development, and the professionalisation of South Africa's solar PV industry nationwide.

SAPVIA

South African Photovoltaic Industry Association

Informing and educating members & stakeholders

The 3rd edition of the SAREGS revealed a renewable energy project pipeline totaling 133 GW

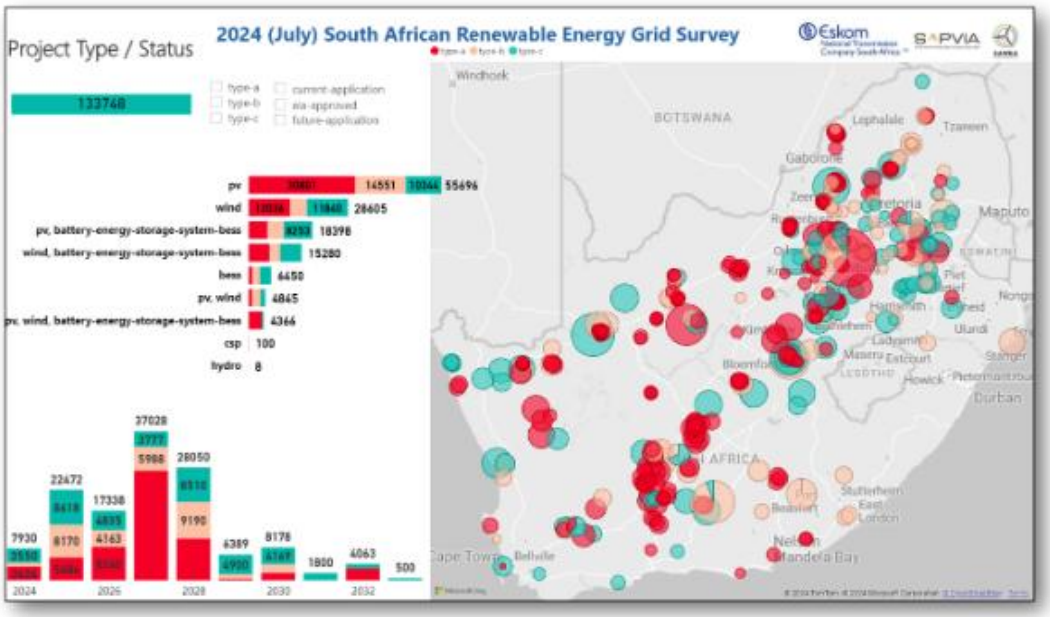
The Grid Access Working Group led the third annual SA Renewable Energy Grid Survey (SAREGS), released on 19 August 2024 during a virtual media briefing co-hosted by SAPVIA, SAWEA, and the NTCSA. The survey is a collaborative effort involving SAPVIA, SAWEA, Eskom, the NTCSA, the Energy Council of South Africa, independent power producers, municipal utilities, and other stakeholders. It offers a comprehensive view of grid capacity demand over the next three to ten years.

Findings were presented by the Strategic Grid Planning Manager at the NTCSA, detailing projected renewable energy development by category solar, wind, gas, and hydro by timeline, and by location relative to existing transmission network regions.

The survey guides Eskom and NTCSA in grid capacity assessments and transmission planning, while helping the renewable energy sector shape investments. This year's data points to a project pipeline of 133 GW more than double 2023 total. About 60 GW is expected to be grid-ready within three to five years.

Industry support for the survey increased significantly, with 483 submissions compared to 209 in 2023.

- Solar PV led growth with a 120% increase to 76 GW, surpassing all capacity submitted in the previous year.
- Wind energy projects also grew, reaching over 48 GW a 50% increase from 30 GW in 2023 with notable expansion into new regions such as KwaZulu-Natal and the Highveld, including Mpumalanga. This marks progress in the just energy transition and is expected to boost socio-economic growth.
- Battery energy storage submissions, primarily in hybrid wind and/or solar projects, rose by 77%.
- The survey also highlights shifting geographical demand. The Northern Cape saw a 218% increase in projected demand over 10 years, while Gauteng experienced a nearly tenfold rise in grid connection submissions.
- This annual survey plays a critical role in informing grid expansion and planning, benefiting REIPPPP, private generation, and wheeling initiatives. For the NTCSA, it offers essential insights into grid access demand and supports strategic planning, including ancillary service requirements, as South Africa transitions to a new energy future.



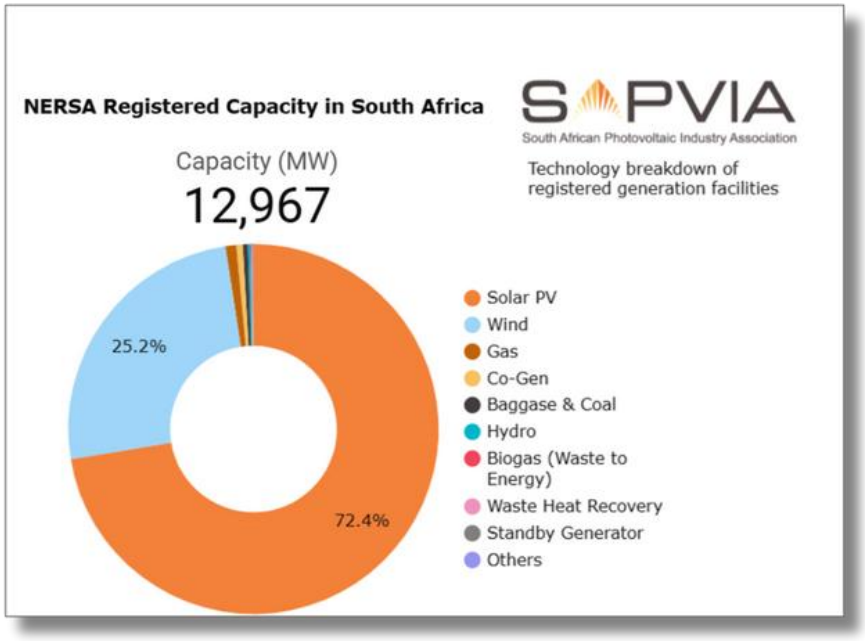
NBI-ABSA Partnership

One of SAPVIA's core strategic objectives is to inform, empower, and build capacity among its members and broader industry stakeholders. In line with this goal, and as part of our commitment to inclusive sector transformation, SAPVIA partnered with the National Business Initiative (NBI) and ABSA to implement a national skills development programme during the year under review.

This initiative focuses on upskilling 100 qualified youth electricians across eight provinces, through accredited Solar PV GreenCard training. The programme aims to close the technical skills gap in the solar industry while advancing youth employability and entrepreneurial participation in the green economy.

NERSA Registered Capacity in South Africa in 2024/25:

The year under review ended in March 2025, at that point, renewable energy registered with NERSA had reached a 12GW milestone with solar PV adding 3235MW for this financial year. Solar PV still dominates the RE energy space with over 9GW for the total registered plants



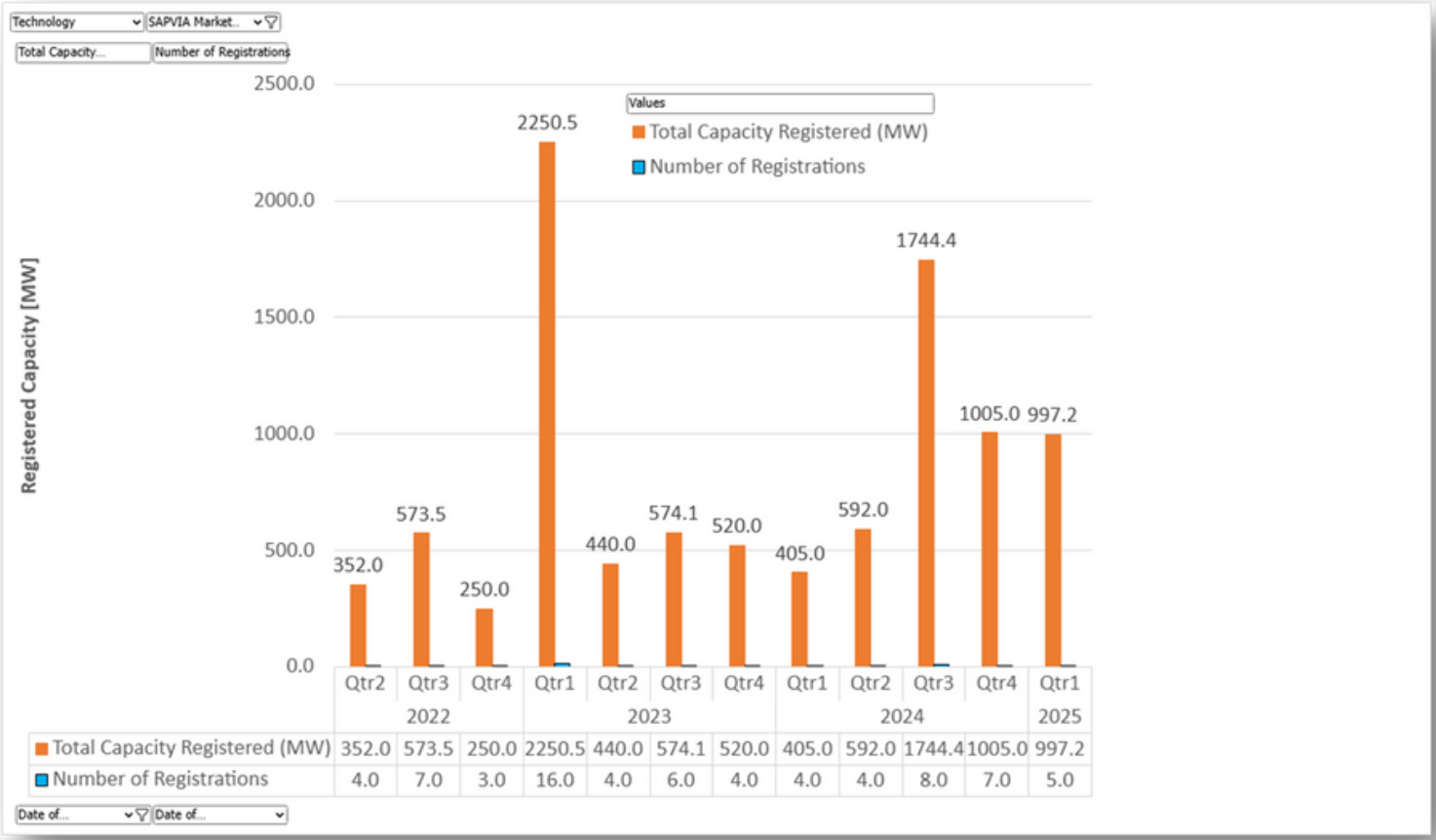
Minimum Size of Projects Registered: 100 kWp
•Solar PV: 72,4% (9384,58 MW)
•Wind: 25.2% (3267,58 MW)
2023 Registrations: 4529 MW
2024 Registrations: 3235 MW

- SA PV (and wind) market was initially dominated by public utility-scale procurement through the REI4P
- Demand has swung from reliance on REI4P utility scale projects towards private projects
- Large scale commercial and industrial (C&I), Smaller scale embedded generation (SSEG) and Residential
- REI4P projects likely to remain major part of SA demand but private projects will be of a similar magnitude
- 4461MW of Solar PV Capacity likely designed for wheeling. 44% of the Total registered capacity and 73% of the Total Solar PV registered capacity.

Private Utility Projects

As part of the private utility-scale project developments, NERSA registrations have played a critical role in enabling project implementation, driven by regulatory requirements under the Electricity Regulation Act (ERA) and as a key step toward financial close. During the reporting period, 55 private utility projects exceeding 50MW in size were successfully registered, with a combined capacity of 7,463MW most notably in Limpopo (2,251MW), Free State (1,662MW), and North West (1,382MW). These developments were supported by an increasingly enabling environment, following the 2021 amendment to ERA Schedule 2, which lifted licensing requirements from 1MW to 100MW and later removed them entirely in December 2022.

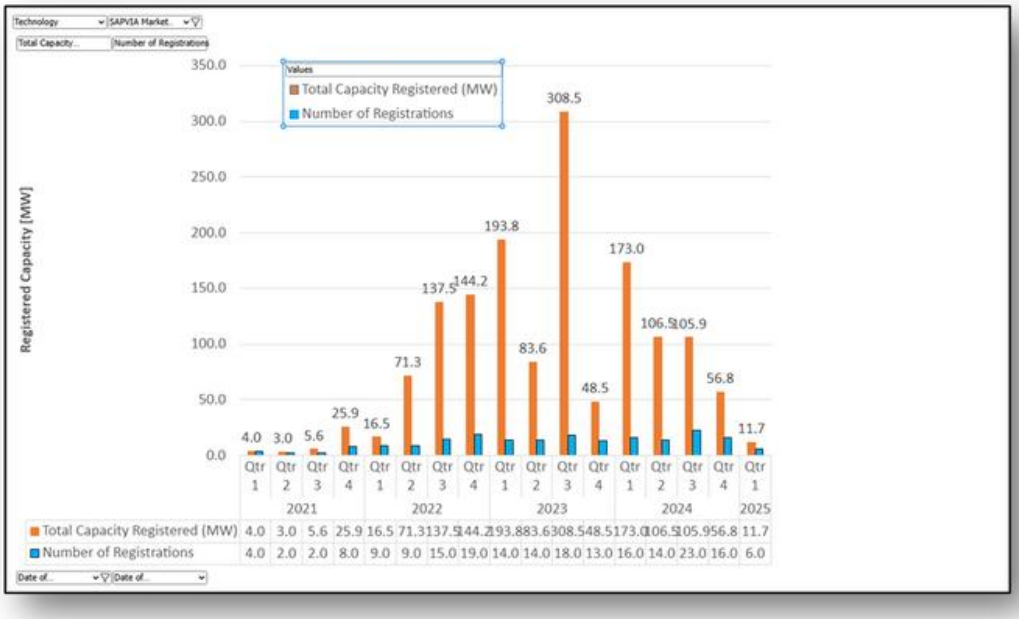
NERSA Registered Utility Scale Solar PV Projects (>50MW)



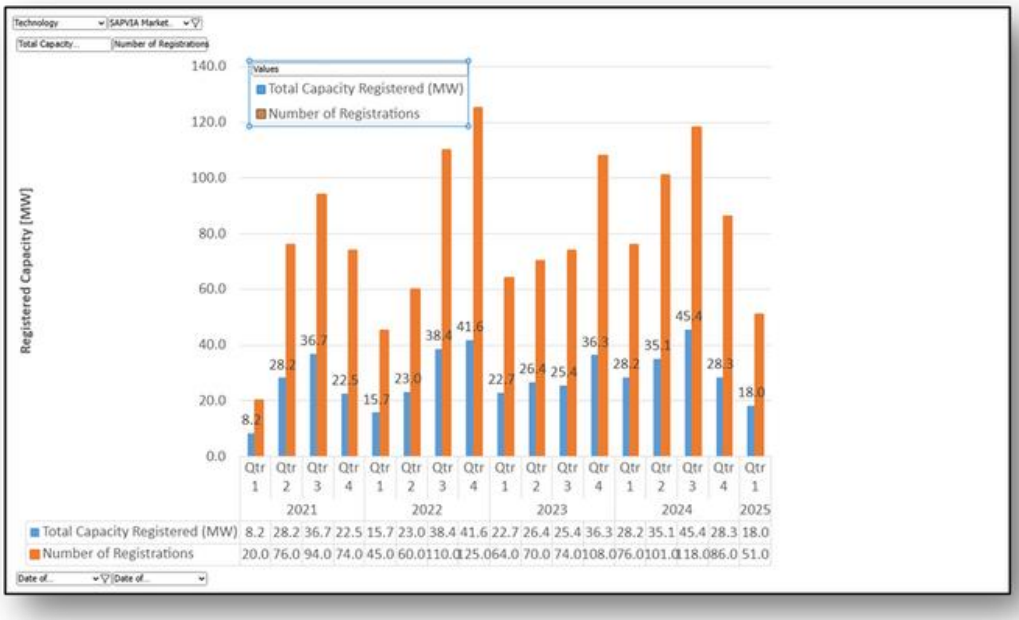
C&I Solar Projects Registered With NERSA

NERSA-registered Commercial and Industrial (C&I) large-scale solar PV projects (1–50MW) continue to show robust growth, reflecting increased private sector investment in energy generation. At the same time, Small-Scale Embedded Generation (SSEG) projects under 1MW have also contributed meaningfully to the energy landscape. Recent trends, illustrated by the rolling average, indicate a steady and consistent rise in sub-1MW registrations, highlighting growing adoption of decentralised solar solutions across various sectors.

NERSA Registered C&I large Scale Solar PV Projects (1-50MW):



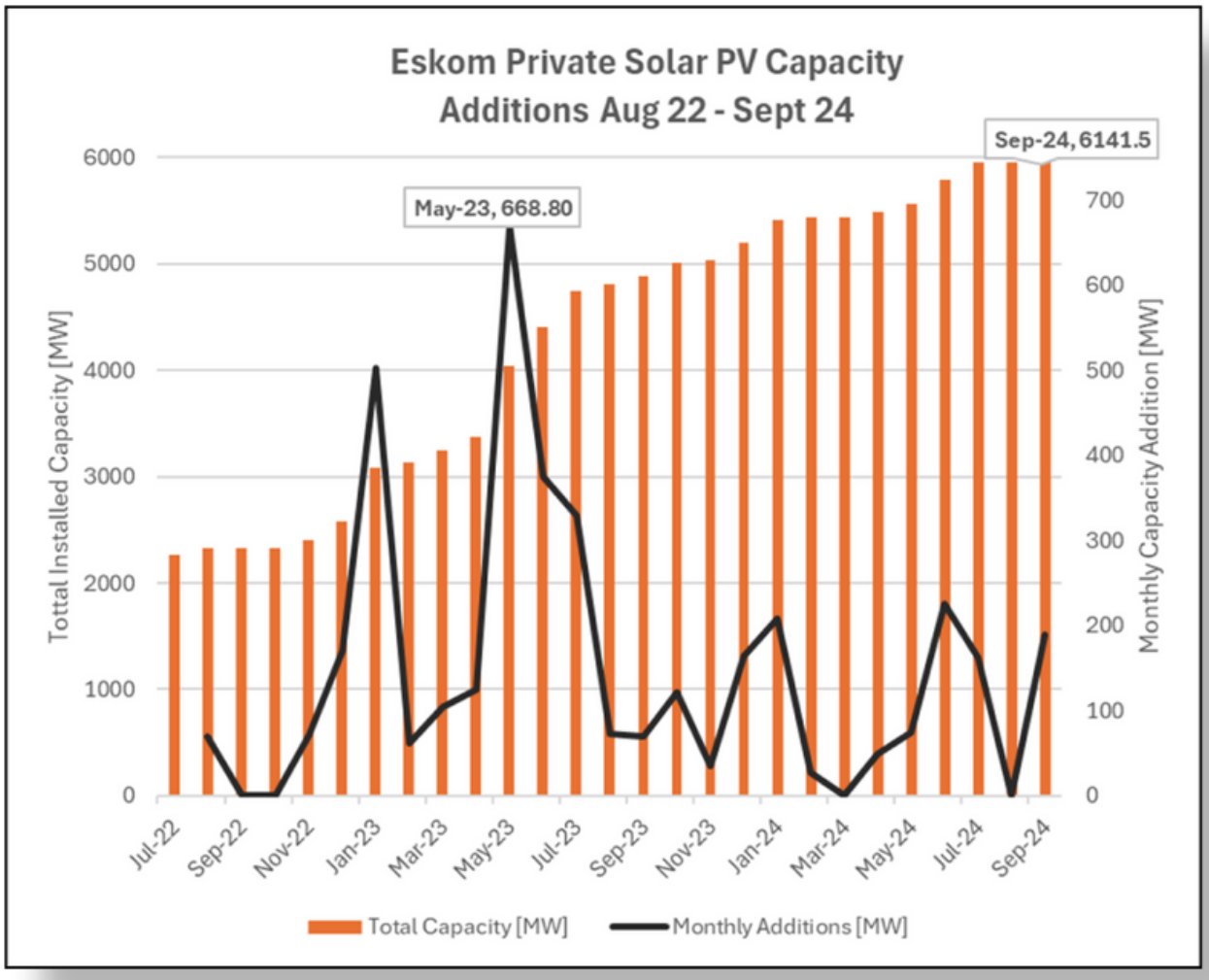
NERSA Registered SSEG Solar PV Projects (<1MW):



Private Solar Capacity Additions

The Eskom/NTCSA methodology for estimating installed solar PV capacity relies on load forecasting analyses conducted by the System Operator, which compares residual load patterns between sunny and cloudy days. This approach captures all private sector capacity additions across residential, commercial and industrial (C&I), and utility-scale installations. The data, published weekly in Eskom's system status reports, provides a transparent view of market growth. In 2023, a total of 2,629MW was added, with an average monthly addition of 220MW. As of 2024 year-to-date, 937MW has been added, averaging 104MW per month. Cumulatively, South Africa's operational solar PV capacity now stands at 8,969MW, comprising 2,287MW from REI4P (including 375MW from Round 5 expected in 2025), 540MW from RMIPPPP, and 6,142MW from private sector installations.

PRIVATE SOLAR CAPACITY



SAPVIA
South African Photovoltaic Industry Association

Collaborations and Partnerships

Strategic partnerships and meaningful collaborations remain central to SAPVIA's mission of delivering tangible value to members while advancing the growth and sustainability of South Africa's solar PV sector. Over the past year, SAPVIA has deepened its engagement with longstanding partners and forged new alliances, strengthening our collective ability to influence and shape the industry.

These collaborations span both public and private sectors and are designed to unlock market opportunities, promote knowledge sharing, and accelerate the achievement of industry objectives. Our partnership approach is not just cooperative—it is transformative. By fostering multi-stakeholder engagements, we are addressing systemic challenges, promoting inclusive development, and building a foundation for long-term impact across the solar PV value chain.

Aligned with SAPVIA's strategic priorities, our partnership strategy is focused on:

- Enhancing energy access and security through technical collaboration and policy advocacy.
- Supporting a just energy transition by investing in local skills development and capacity building.
- Unifying Africa's voice in global renewable energy platforms to drive continental leadership.

Key Collaborative Initiatives

SAPVIA continues to expand its footprint through strategic partnerships with the following stakeholders and initiatives:

Public Sector & Industry Bodies:

- IPPO, Eskom, NEDLAC, SALGA, DFFE, SAPOA, CSIR, ECA, Small Enterprise Financing Agency (SEFA), Minerals Council, and the Department of Trade, Industry and Competition (DTIC).

Business & Advocacy Platforms:

- BUSA, Energy Council of South Africa (where SAPVIA co-leads the Grid Access Working Team), and BravoScan.

Academic and Research Institutions:

- University of Cape Town, GreenCape, and collaborative research with the CSIR.

International Engagements & Global Forums:

- Global Networks: Global Solar Council, SolarPower Europe, Clean Energy Council of Australia, RES4Africa, and BSW (German Solar Association).
- Development Partners: GIZ (on multiple initiatives), UNDP (on private PPA frameworks).
- Diplomatic Engagements: Various international embassies and the European Union Delegation.
- Conferences and Bilateral Forums: Participation in the Global Solar Council Meeting and other international dialogues.

SAPVIA also maintains active working relationships with key government entities and holds standing engagements with IPPO, SAREM, and BUSA to ensure alignment on national policy and implementation frameworks.

Through these partnerships, SAPVIA continues to play a leadership role in shaping the market, supporting local content development, and driving South Africa—and Africa—toward a secure, inclusive, and sustainable energy future.

Collaboration with Univen

SAPVIA Supports Solar PV Skills Development at UNIVEN's NZEB Summer School

From 03 to 14 March 2025, the University of Venda (UNIVEN), in collaboration with the Departments of Science and Innovation and Defence, hosted the NZEB Summer School at the 15 SAI Battalion Vuwani Base. Led by the Green Technology Confucius Institute (GTCI), the programme trained 20 young individuals in Solar PV Technology through a blend of theory and hands-on experience. Key sessions included lectures on skills development for South Africa's just energy transition and on the future of solar PV, retrofitting challenges, and the role of industry in policy advocacy. SAPVIA's Junior Technical Specialist, Sinethemba, contributed as a guest speaker in the latter, sharing insights on current sector trends, challenges, and opportunities, helping to build local capacity for a sustainable energy future.

PowerUp

SAPVIA is also a key partner in PowerUp, a digital platform bridging the gap between education providers, employers, and industry to address critical skills shortages and improve employment outcomes in the green economy.

We are proud to partner with the Energy and Water Sector Education and Training Authority, GreenCape, South African Wind Energy Association (SAWEA), Department of Higher Education and Training (DHET), DMRE, @MERSETA, NAACAM, PCC, Quality Council for Trades and Occupations (QCTOZA), CHE, TIPS (NPC), UK PACT (Partnering for Accelerated Climate Transitions), Yes4Youth, and many more in driving skills development and preparing South Africa's workforce for a sustainable future!

Government & Private Sector Collaborations

SAPVIA has demonstrated its commitment to addressing industry challenges related to grid access, import duties, and market design improvements. These efforts aim to create a conducive environment for solar PV deployment, enhance energy security, and support the growth of South Africa's renewable energy sector.

IPPO Engagement

SAPVIA and the Independent Power Producer Office (IPPO) have established a collaborative working relationship to advance renewable energy initiatives in South Africa. Both organisations have expressed a strong commitment to working together to address challenges and unlock opportunities within the renewable energy sector. As part of this commitment, quarterly meetings have been proposed to exchange updates, tackle challenges, and discuss industry-wide issues. Key discussion points include:

- Efforts to improve Request for Proposals (RFPs) for future bid windows, aiming to enhance opportunities specifically for solar PV and wind projects.
- The reallocation of capacity from wind to solar PV in Bid Window 7, recognised as a strategic adjustment to better meet demand.
- The development of the Infrastructure Transmission Programme (ITP), with ongoing discussions focused on structuring the programme and exploring credit enhancement facilities.
- A review of proposed amendments to the Electricity Regulation Act to support the implementation of the ITP.
- Planned workshops and consultations to ensure alignment and progress toward shared objectives.

Engagements with Deputy Minister of Energy on SAREM & Solar PV Growth

Key Focus Areas of the discussions included:

- Positioning SA's solar PV sector for global and local industrial opportunities
- Leveraging SAPVIA's localisation studies to strengthen renewable energy value chains
- Boosting local manufacturing in trackers, mounting systems and cables
- Smart tariff implementation to support domestic production
- Expanding solar access to underserved communities
- This productive dialogue reinforced our shared commitment to energy security and economic growth through renewable energy development. We look forward to continued collaboration!

Conclusion

SAPVIA's comprehensive policy and advocacy work has made a significant impact on the development of South Africa's solar PV industry. From influencing national energy policy and advancing industrial development strategies to driving regulatory reform, grid access, and skills development, SAPVIA continues to shape a more sustainable, inclusive, and secure energy future.

Through evidence-based recommendations, strategic partnerships, and continuous industry engagement, SAPVIA remains committed to creating an enabling environment for solar PV deployment — anchoring the sector's role in South Africa's just energy transition.

SAPVIA

South African Photovoltaic Industry Association

Promote Higher usage of solar PV in Private and Public Sectors

47 - 50

Key Collaborative Initiatives

Promoting the uptake of solar PV across both the public and private sectors is central to our mandate. Over the past year, SAPVIA continued to provide thought leadership through active engagement in digital, print, and broadcast media. Our communications strategy aimed to elevate the industry's voice, shape public discourse, and position solar PV as a vital contributor to South Africa's energy future.

Media Engagement

The year under review saw consistent distribution of editorial content to media, to showcase the work of SAPVIA as the voice for the solar PV industry.

Between July 2024 and May 2025, **348 pieces of coverage were recorded**. An **AVE of R13,954m was achieved** and an estimated **audience reached of 248,359m**. (Reporting for the month of June was not available at the time of compiling this annual report.) Key publicity and **Annual PR Monthly Overview** highlights are shared below:

348
Pieces of Media Coverage

248,359m
Audience Reached

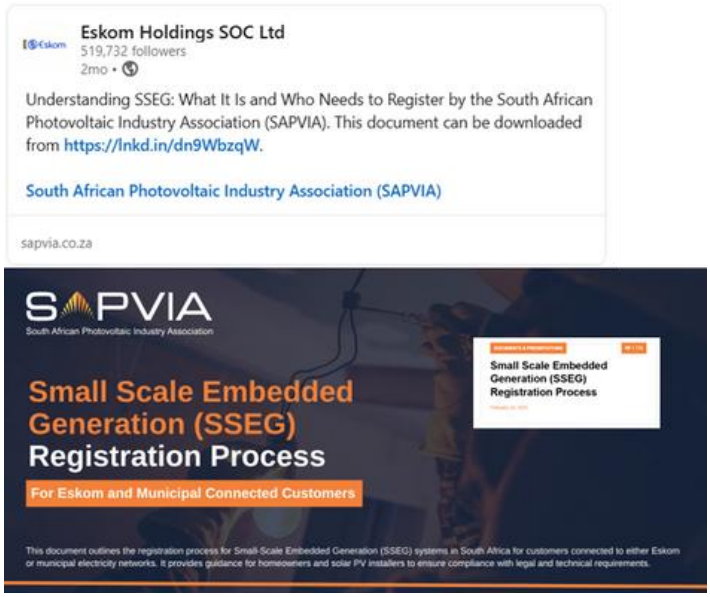
R13,954m
AVE Value

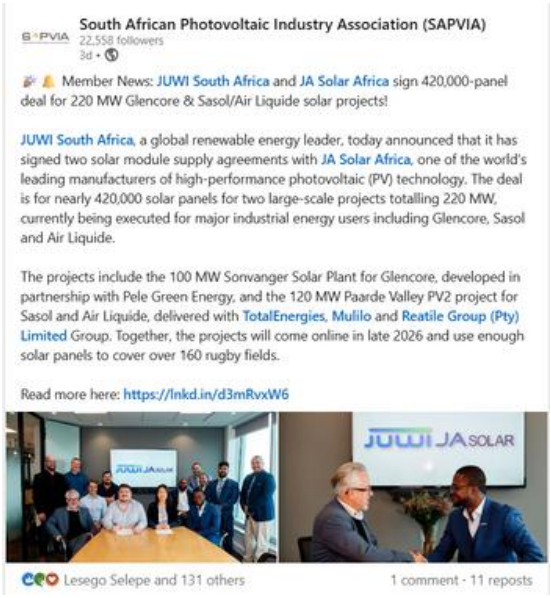
KEY PUBLICITY / PR HIGHLIGHTS

Digital Presence (Online Presence)

	Current Following |LinkedIn	Current Following | Facebook
SAPVIA	22 60	864
PV Green Card	890	1109

Snapshot social media highlights





Executed Bi-monthly

Dear Valued Member,

As the year charges ahead, the renewable energy sector's momentum continues unabated, with SAPVIA at the center of critical conversations, policy breakthroughs, and transformative industry events.

Now, as we gear up for our **AGM and Awards Ceremony on 3rd of July,** the momentum only grows stronger. Whether you are reflecting on key takeaways from recent industry gatherings or looking ahead to the next big event, this edition is packed with insights to fuel your work and vision.

From breakthroughs to partnerships, the renewable energy sector is writing its boldest chapter yet—and you're a vital part of it. Let's shine a light on what's moving us forward.

SAPVIA calls for one flat rate for all users of electricity in Joburg

We are urging the City of Johannesburg to rethink its electricity tariff structure. Postpaid customers are being charged over R1,000 more than prepaid users each month — before even switching on a light.

Patrick Narbel, PhD, our Residential PV Working Group Chairperson, is calling for a fair, flat rate for all Joburg residents, in line with principles of equity, transparency, and affordability.

Read the full article here


inter solar
connecting solar business
SUMMIT AFRICA
Panel Discussion:
Lighting the Way Forward for Solar in Africa
March 12, 11:15 am
Register today
Panelist
Dr. Rethabile Melamu
Chief Executive Officer
South African Photovoltaic Industry Association (SAPVIA)


SAPVIA
INDUSTRY-WIDE WEBINAR
EXTENDED PRODUCER RESPONSIBILITY (EPR) REGULATIONS
DATE
22 AUGUST 2024
TIME
12:00PM - 14:00PM
SCAN ME
WEBINAR AGENDA
12:00 - 12:05 Opening and Welcome
12:05 - 12:25 EPR Policy overview & Regulations
12:25 - 12:40 EPR – Registration & reporting requirements
12:40 - 12:55 EPR Compliance & Enforcement
12:55 - 13:10 EPR Portal and Functionalities
13:10 - 13:20 EPR for EEE & Lighting
13:20 - 13:30 Improving reporting on jobs by PROs and Producers
13:30 - 13:50 Q & A
13:50 - 14:00 Way forward & Closure
RSVP: https://app.glueup.com/event/industry-wide-webinar-on-extended-producer-responsibility-epr-regulations-117131/


BERLIN ENERGY TRANSITION DIALOGUE 25


INSPIRED COMMUNITY TRUSTS


BERLIN ENERGY TRANSITION DIALOGUE 25


SAPVIA
INDUSTRY WEBINAR
From Compliance to Sustainability:
The Role of NRCS and NRS
Understanding how NRCS and NRS Requirements Shape Safety, Quality, and Renewable Energy in South Africa
COMPLIANCE
Wed, 26 February 2025
11:30 AM - 13:00 PM
Scan here to register
For more information or if you have any questions, feel free to reach out to us at info@sapvia.co.za
This Webinar is brought to you by SAPVIA's Manufacturing Working Group
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Advisory Board Member
De Wet Taljaard
Technical Specialist
South African Photovoltaic Industry Association
"I truly believe that renewable energy can be utilised to achieve sustainable development"


SAWEA
05
03
25
CEO Roundtable
Breakfast for Policy and Industry Leaders
"Transforming the renewable energy market through policy-driven sector reforms"
WESTIN, CAPE TOWN
07:30 - 09:30
EVENT PARTNERS
GWEC
GWEC
SAPVIA


EWC
4TH ELECTRICITY WHEELING CONFERENCE 2025
16 -17 April 2025 Cape Town
The Capital 15 On Orange Hotel
Theme: Electricity Wheeling:
A Tool for African Nations
Brought to you by
Sponsor
Media Partner
Exhibitor
CPD Credits
MILLASA
BASF
Economy
ECSA Validated Activity
Credits: 2 ECSA CPD Points

Working Groups

Working Groups

The South African Photovoltaic Industry Association is committed to advancing the solar PV industry in South Africa by fostering collaboration, advocating for policy improvements, and driving industry-wide best practices. One of the key ways we achieve this is through our Working Groups, which bring together experts, industry leaders, and stakeholders to address challenges, develop solutions, and create opportunities for growth.

Our Working Groups serve as specialized platforms where professionals from various sectors of the solar PV industry can exchange insights, engage with policymakers, and contribute to the development of regulations and standards. Each group focuses on a critical aspect of the industry, from grid access and manufacturing to residential PV solutions, skills development, gender diversity, and environmental impact.

At SAPVIA, we believe that through collaboration, knowledge-sharing, and proactive engagement, we can drive the solar PV industry forward and support South Africa's transition to a cleaner, more sustainable energy future. Whether you are a manufacturer, installer, developer, financial institution, policymaker, or technical expert, there is a Working Group suited to your expertise and interests.

- **Distributed Generation (DG):** Focus on embedded generation, wheeling innovation, and storage integration.
- **Environmental:** Streamline permitting, compliance, and coexistence challenges.
- **Gender & Economic Development**: Promote inclusivity and equity in the energy transition.
- **Grid Access:** Address bottlenecks in project connection processes.
- **Manufacturing:** Boost local production and green job creation.
- **Residential PV:** Enable growth in the residential solar market responsibly.
- **Skills for PV:** Build a trained workforce to meet solar demand.

Working Group Chairpersons

The leadership structure of SAPVIA Working Groups ensures that each group is guided by experienced professionals who are committed to advancing the solar PV industry. By fostering collaboration and proactive engagement, these leaders contribute to South Africa's transition to a cleaner, more sustainable energy future.

Distributed Generation Working Group

Purpose

The Distributed Generation Working Group (DGWG) is committed to promoting quality and market access across South Africa's embedded generation landscape, with a particular focus on end-user benefits. The group collaborates with government departments, municipalities, Eskom, NERSA, and other key stakeholders to establish a robust and sustainable distributed PV market that supports commercial, industrial, and residential applications.

Leadership:

Oliver Johnson
Chairperson

Jigisha Mandalia
Deputy Chairperson

Dermott Murphy
Deputy Chairperson

Key Focus Areas

The DGWG operates through four targeted workstreams, each addressing critical facets of the distributed generation ecosystem:

Embedded Projects Workstream	• Focuses on on-site renewable energy systems for C&I and residential use. • Key issues: Small-Scale Embedded Generation (SSEG), use-of-system approvals, PPA structures, reverse feed tariffs. • Engages with municipalities and Sustainable Energy Africa to resolve process barriers and standardisation gaps.
Wheeled Projects Workstream	• Tackles off-site energy supply via bilateral and virtual wheeling agreements. • Focuses on developing tariff structures, reconciliation methods, and municipal wheeling frameworks. • Collaborates with Eskom and municipalities to align practices with market needs.
Regulatory & Policy Engagement Workstream	• Interfaces with Eskom, NERSA, and government on relevant regulatory developments. • Provided sector input into the Integrated Resource Plan (IRP), retail tariff reform, and tax incentives. • Advocates for distributed generation in national energy planning and policy formulation.
Technical Workstream	• Addresses grid code compliance, storage integration, and equipment standards. • Supports technical feasibility and innovation in embedded and wheeled generation. • Engages with RETEC and the Grid Code Advisory Committee (GCAC) to shape practical compliance protocols.

Key Achievements (2024–2025)

- NERSA Net-Billing Commentary:
- Submitted detailed feedback on Annexure B of the Net-Billing Rules, focusing on:
- Standardised export credit methodologies to balance municipal revenue protection with solar PV incentives.
- Proposals for prosumer inclusion in wheeling and net-metering models.
- Policy and Market Design Initiatives:
- Developed recommendations for export tariff methodologies and implementation consistency.
- Worked with SAPVIA members and NERSA to refine billing models aligned to real market conditions.
- SAWEM Code Evaluation:
- Reviewed the South African Wholesale Electricity Market (SAWEM) Code.
- Suggested enhancements for increased solar PV participation, including:
- Sub-hourly settlement systems.
- Ancillary services market design.
- Improved marginal participation models to support distributed generators.
- Conference Representation:
- DGWG Chairperson represented SAPVIA at the 4th Electricity Wheeling Conference 2025, delivering a key presentation on:
- Wheeled vs embedded energy models.
- Impacts of the Retail Tariff Plan approval on wheeling.
- Integration of energy storage with wheeled generation supply.

Residential PV Working Group

Established in 2025

Purpose

The Residential PV Working Group was launched in 2025 to address the rapid expansion and evolving needs of the residential solar market in South Africa. The group serves as a collaborative platform for service providers, municipalities, regulators, and end-users, with the aim of building a sustainable, compliant, and consumer-focused residential PV sector.

Leadership

Patrick Narbel
Chairperson

Vincent Maposa
Chairperson

Agreepa Mangalani
Deputy Chairperson

Our Mission

- Develop a unified voice for the residential PV industry.
- Establish a sustainable and regulated framework for sector growth.
- Promote quality assurance, compliance, and consumer protection.
- Strengthen collaboration between municipalities, service providers, and regulatory bodies.

Key Focus Areas

Regulation and Compliance

- Advocate for transparent and effective residential PV regulations.
- Collaborate with PV GreenCard, NERSA, municipalities, and other key entities to improve technical and installation standards.
- Support the development of clear approval processes and SSEG registration protocols.

Consumer Protectionnd process maps to support installers and regulators.

- Promote consumer education and awareness around quality solar PV systems.
- Address market concerns such as substandard installations, misinformation, and contractor accountability.
- Drive the adoption of verified service provider frameworks.

Data-Driven Advocacy	• Commission research studies, white papers, and position papers to support evidence-based engagement with stakeholders. • Use data insights to shape policy and regulatory reform, especially at municipal and national levels.
Standardization	• Push for consistent standards across municipalities for installations, compliance, and safety. • Collaborate on best-practice templates, checklists, and process maps to support installers and regulators.

Key Achievements (2025)

As a newly established group, the Residential PV Working Group has laid a strong foundation for future impact:

- Convened its inaugural national roundtable, bringing together municipalities, installers, and compliance bodies.
- Initiated a stakeholder mapping exercise to identify priority partners and regulatory gaps.
- Started drafting a position paper on residential PV permitting and approval processes across metro municipalities.
- Partnered with PV GreenCard to align on minimum installer competency requirements for residential projects.

Plans for 2025–2026

Residential PV Policy Roadmap:
Develop a strategic roadmap outlining key milestones for regulation, incentives, and quality control in the sector.

Installer Accreditation Engagement:
Work with training institutions and PV GreenCard to raise the standard of service providers and improve consumer confidence.

Municipal Engagement Toolkit:
Design tools and templates to support municipalities in streamlining their PV approval and oversight processes.

Data & Insight Publication:
Release SAPVIA's first Residential PV Insight Report, compiling market data, policy trends, and consumer challenges.

Public Awareness Campaign:
Launch a public campaign to educate consumers on selecting verified providers, understanding SSEG approvals, and maintaining system performance.

Environmental Working Group

Purpose

The Environmental Working Group supports the responsible development of renewable energy by addressing the environmental impacts associated with solar and wind energy deployment. The group focuses on developing sustainable solutions to ecological challenges, quantifying the positive environmental impact of renewable energy—particularly in reducing carbon emissions and advising on regulatory and permitting frameworks.

The Working Group provides expert review and feedback on environmental permitting, compliance, and co-existence issues, ensuring that environmental considerations are integrated into the full lifecycle of renewable energy projects from planning through operation.

Leadership

Patricia Schröder
Chairperson

Andrea Siebritz
Deputy Chairprson

Kakale Munamati
Deputy Chairperson

Key Focus Areas for 2025

Environmental Permitting and Licensing	• Address bottlenecks in Environmental Impact Assessments (EIAs) and registration processes. • South African Defence Force (SANDF) Permit • Advocate for efficient and predictable timelines for obtaining SANDF no-objection permits. • Propose clear guidelines to support consistent implementation.
Compliance and Enforcement	• Engage with the Department of Forestry, Fisheries and the Environment (DFFE) to discuss compliance challenges during construction and operational phases.
Water Use License Applications (WULAs)	• Tackle inconsistencies in licensing, especially regarding Conservancy tank approvals. • Collaborate with the Department of Water and Sanitation (DWS) to standardize and improve WULA processes.

Mining Permits and Coexistence Agreements

- Address overlapping land rights and coexistence issues with mining and gas operations.
- Work with the Department of Mineral Resources and Energy (DMRE) and the Petroleum Agency of South Africa (PASA) to seek alignment on coexistence frameworks.

Extended Producer Responsibility (EPR) Regulations

- Drive awareness and compliance in the solar PV industry regarding EPR requirements.
- Host educational events and issue regular updates on EPR regulation amendments and obligations.
- Compile a detailed list of environmental permits and licenses relevant to the renewable energy industry.
- Extended Producer Responsibility (EPR) Regulations Webinar
- Chairperson Ms Patricia Schröder moderated the session, which featured key presentations from DFFE on:
- EPR policy overview and compliance expectations
- EPR enforcement procedures and use of the national portal
- The event addressed the responsibilities of stakeholders who:
- Import solar PV equipment commercially
- Export solar PV equipment into South Africa
- Strengthened partnerships with DFFE, DWS, GreenCape, DMRE, and PASA.
- Initiated sector dialogue on the intersection of EPR and the growing solar PV ecosystem.

Plans for 2025–2026

- Finalize and publish the Environmental Permitting & Licensing Handbook for solar PV developers.
- Conduct targeted workshops on compliance readiness for large-scale and embedded generation projects.
- Expand engagement with municipalities and provincial authorities to ensure alignment on EIA and WULA processes.
- Collaborate with stakeholders to develop a framework for renewable energy–mining coexistence agreements.
- Release a 2025 Environmental Impact Summary Report highlighting renewable energy's contribution to emission reductions and biodiversity preservation.

Gender & Economic Development Working Group

Purpose

The Gender and Economic Development Working Group is a dynamic SAPVIA initiative committed to fostering gender diversity, economic inclusion, and sustainable community development within South Africa's renewable energy sector. The group serves as a collaborative platform for driving systemic change through strategic advocacy, capacity building, and stakeholder engagement.

Leadership

Jenelle Krishna
Chairperson

Tebogo Marufu
Deputy Chairperson

Liana Braxton
Deputy Chairperson

Focus Areas
The Working Group advances two core pillars:

Gender Diversity: Promoting equality and inclusion by operationalizing the Department of Mineral Resources and Energy's Women Empowerment and Gender Equality (WEGE) Strategy across the industry.

Economic Development: Driving community upliftment, financial inclusion, digital transformation, and meaningful progress on Broad-Based Black Economic Empowerment (BBBEE) compliance.

Objectives

Gender Diversity Charter:

- Implement the WEGE Strategy to foster enabling environments, equal opportunities, and barrier-free workplaces.

Economic Development Initiatives:

- Support financial inclusion, digital skills development, and BBBEE compliance to empower businesses and individuals.

Key Activities

Gender Diversity Charter

- Promote inclusive workplace policies, leadership buy-in, and equal pay initiatives.
- Support career development programs and family-friendly cultures.
- Encourage community-driven diversity initiatives and remove systemic barriers.
- Triple BBBEE Compliance
- Develop and advocate for strategies enhancing economic inclusion within the renewable energy sector.
- Collaborate with industry and government stakeholders to drive compliance and measurable outcomes.
- Financial Inclusion
- Raise awareness of affordable and accessible financing solutions for renewable energy projects.
- Support SMEs and entrepreneurs in navigating financial and regulatory landscapes.
- Digital Transformation
- Promote adoption of digital technologies to improve operational efficiencies.
- Facilitate mentorship, training, and upskilling to address the digital skills gap.
- Plans for 2025–2026
- Launch a Gender Diversity Toolkit for industry employers to support WEGE Strategy implementation.
- Host regular Economic Inclusion Forums to share best practices and foster cross-sector collaboration.
- Develop a Financial Access Guide tailored to renewable energy SMEs.
- Initiate a Digital Skills Accelerator Program focusing on underrepresented groups in the sector.
- Advocate for enhanced reporting and transparency on BBBEE and gender diversity metrics within SAPVIA member companies.

Grid Access Working Group

(GAWG) is a collaborative platform focused on resolving challenges related to connecting renewable energy projects to the national and municipal grids. The group engages with key stakeholders, including the Department of Mineral Resources and Energy (DMRE), the National Energy Regulator of South Africa (NERSA), Eskom, and local municipalities, to promote feasible and sustainable grid access solutions—primarily for large-scale projects under the REIPPPP, but also extending support to other renewable market segments.

Leadership

Zayd Vawda
Chairperson

Wayne Smith
Deputy Chairperson

Key Achievements (2024–2025)

Mine Infrastructure Repurposing Feasibility Study

In collaboration with the Minerals Council and Eskom Distribution (Dx), the Working Group assessed the potential for repurposing mine infrastructure for solar PV generation. Outcomes included:

- Identification of typical electrical layouts and connection capacities at South African mines.
- Technical feasibility of using existing Eskom Dx infrastructure for generation-only connections.
- Regulatory assessments on wheeling, municipal offtake models, and aggregator structures.

2024 South African Renewable Energy Grid Survey (July Edition)

A national review of renewable energy projects by development stage and technology:

- Total Contracted Capacity: 133,748 MWac
- Installed Capacity: 172,422 MWac
- Technology Leaders: PV (55,696 MWac), Wind (28,605 MWac), BESS (6,450 MWac)
- Top Regions: Northern Cape, Free State, Hydra Central
- Ancillary Services: Assessment of reserve capacity, reactive control, and black start readiness
- Development Categories: Type A (advanced), B (under development), C (early-stage)

Plans for 2025

1.Transmission IPPs
- Provide feedback to the IPP Office on the Transmission RFI process.
- Encourage member participation in shaping the Transmission Development Plan (TDP).

2. Grid Capacity Allocation Rules
- Monitor updates to Eskom's IGCAR and batching framework.
- Engage on industry concerns related to guarantees, allocation revocations, and milestone obligations.

3. High-Voltage Applications (Above 132 kV)
- Support IPPs seeking direct access connections and shared collector substations.

4. Reimbursement Mechanisms
- Address the absence of contractual reimbursement clauses for excess electricity fed into the grid.
- Develop a formal Working Group position on the issue.

5. Curtailment and Compensation
- Continue engagement with Eskom on wheeling project curtailment.
- Advocate for compensation frameworks and transparency in curtailment criteria.

6. 2025 SA Renewable Energy Grid Survey (Second Edition)
- Expand project participation and improve granularity of grid connection data.

7. Grid Code & Compliance
- Provide industry feedback on the SAWEM Market Code.
- Track updates from GCAC on legacy projects, EMT validations, and proposed code amendments.

8. Embedded Projects & Wheeling Excess Energy
- Explore the technical and commercial implications of wheeling surplus energy.
- Draft a concept note for industry and regulator consultation.

Manufacturing Working Group

Purpose

The Manufacturing & Localisation Working Group drives local manufacturing and services within the solar PV sector to support industrialisation, job creation, and sector sustainability. The group promotes compliance with industry standards and collaborates with stakeholders to unlock opportunities for local businesses.

Leadership

Gareth Burley
Chairperson

Govender Patrick
Chairperson

Objectives

- Promote local production of PV components and services.
- Conduct market and trend analysis to guide stakeholders.
- Facilitate skills development and job creation.
- Advocate for favourable policy and funding frameworks.
- Strengthen after-sales services to support system longevity.

Key Activities

- Hosting technical webinars, industry workshops, and public awareness campaigns.
- Publishing white papers and market intelligence reports.
- Collaborating with government, financiers, and regulators to support localisation.
- Developing accreditation pathways for service providers.

2025 Focus Areas

- Skills Development: Support technician training and placement to address shortages.
- Policy Engagement: Drive dialogue with government on incentives, compliance, and quality standards.
- After-Sales Support: Promote establishment of local repair and maintenance capacity.
- Market Intelligence: Expand access to data that supports local manufacturing and procurement.
- Key Achievements (2024–2025)
- Webinar – From Compliance to Sustainability
- Hosted with BravoScan, this session clarified the roles of NRCS and NRS in regulatory compliance and technical standards. Over 150 industry participants attended, including municipalities, installers, and manufacturers.
- Research & Market Intelligence Highlights
- 2022 Localisation Potential Study: Identified PV value chain opportunities for economic impact and localisation.
- State of South African Manufacturing Report (GIZ, SolarPower Europe): Updated PV manufacturing status and potential.
- O&M Best Practice Guidelines: Adapted global quality benchmarks to South African conditions.
- Installed Capacity Data Portal (Oct 2023): Launched as a public tool for national PV data access.
- RE Survey of IPPs (2023): Informed the national Transmission Development Plan.
- Upcoming: SAREGS 2025 Survey to expand market data and planning insights.

Skills for PV Working Group

Leadership

Antje Klauss-Vorreiter
Chairperson

Dr. Gift Mphefu
Deputy Chairperson

Faure van Schalkwyk
Deputy Chairperson

UNIVEN – NZEB Summer School

Key Outcomes:

- Co-led by the Department of Science and Innovation and Department of Defence.
- SAPVIA participated as guest lecturers, training 20 youths in solar PV systems.
- Contribution to local capacity building and awareness of solar PV career paths.

PowerUp Platform

- In partnership with Green Cape

Objectives:

- A national initiative bridging education providers and industry.
- Addresses workforce gaps in the green economy.
- Supported by over 12 institutions including QCTOZA, Yes4Youth, UK PACT, and DHET.
- “PowerUp is a landmark initiative to connect talent with opportunity in the renewables sector.”

HUMAN RESOURCES

Report

For Year Ending 31 March 2025

This HR report reflects on our human capital developments during the 2024/2025 financial year, highlighting strategic appointments, transitions, and future resourcing plans to strengthen our organizational capacity.

Strategic Recruitment

During the reporting period, SAPVIA successfully expanded its team with key additions to support high-impact areas:

Communications and Marketing Specialist:

We welcomed a dedicated Communications and Marketing Specialist, Ms. Wendy Mogale to the team. This role has been instrumental in improving the Association's visibility, stakeholder engagement, and brand alignment. Through targeted campaigns and enhanced media relations, we have been able to amplify our voice on critical policy and industry matters.

Junior Policy Specialist

We also transitioned the Policy Intern Ms. Pamela Gama, into the role of Junior Policy Specialist to enhance our effectiven to shape and influence policy and regulations. Advocacy workstream. This role has provided vital support in coordinating inputs member working groups, and stakeholder coordination, allowing the team to deepen its engagement with government and industry partners and respond to regulatory developments.

Following the departure of our Technical Specialist, we initiated a recruitment process for a replacement with expanded responsibilities.

Building a Stronger Secretariat

Looking ahead, we recognise the need for a more robust and well-resourced Secretariat. As the demands on the Association grow and the solar PV industry expands, our ability to deliver value to members, influence national policy, and implement flagship initiatives will depend heavily on our internal capacity. We are in the process of developing a more ambitious HR plan aimed at building a strong, versatile, and mission-driven team. This includes identifying critical functions, enhancing organisational structure, and securing the resources necessary for sustainable growth.

The past year has been one of measured growth and strategic investment in our people. SAPVIA remains committed to building a Secretariat that reflects the Association's strategic vision and is capable of driving sector transformation. As we move forward, our focus will remain on attracting and retaining top talent, fostering a high-performance culture, and aligning our human resources with the evolving priorities of the renewable energy sector.

Organogram

Dr Rethabile Melamu
Chief Executive Officer

Vacant
Technical Specialist

Zimkita Bilibana
Programmes Coordinator

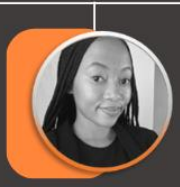
Lineo Masopha
Operations
Administrative Officer

Lesego Selepe
Member Services Coordinator

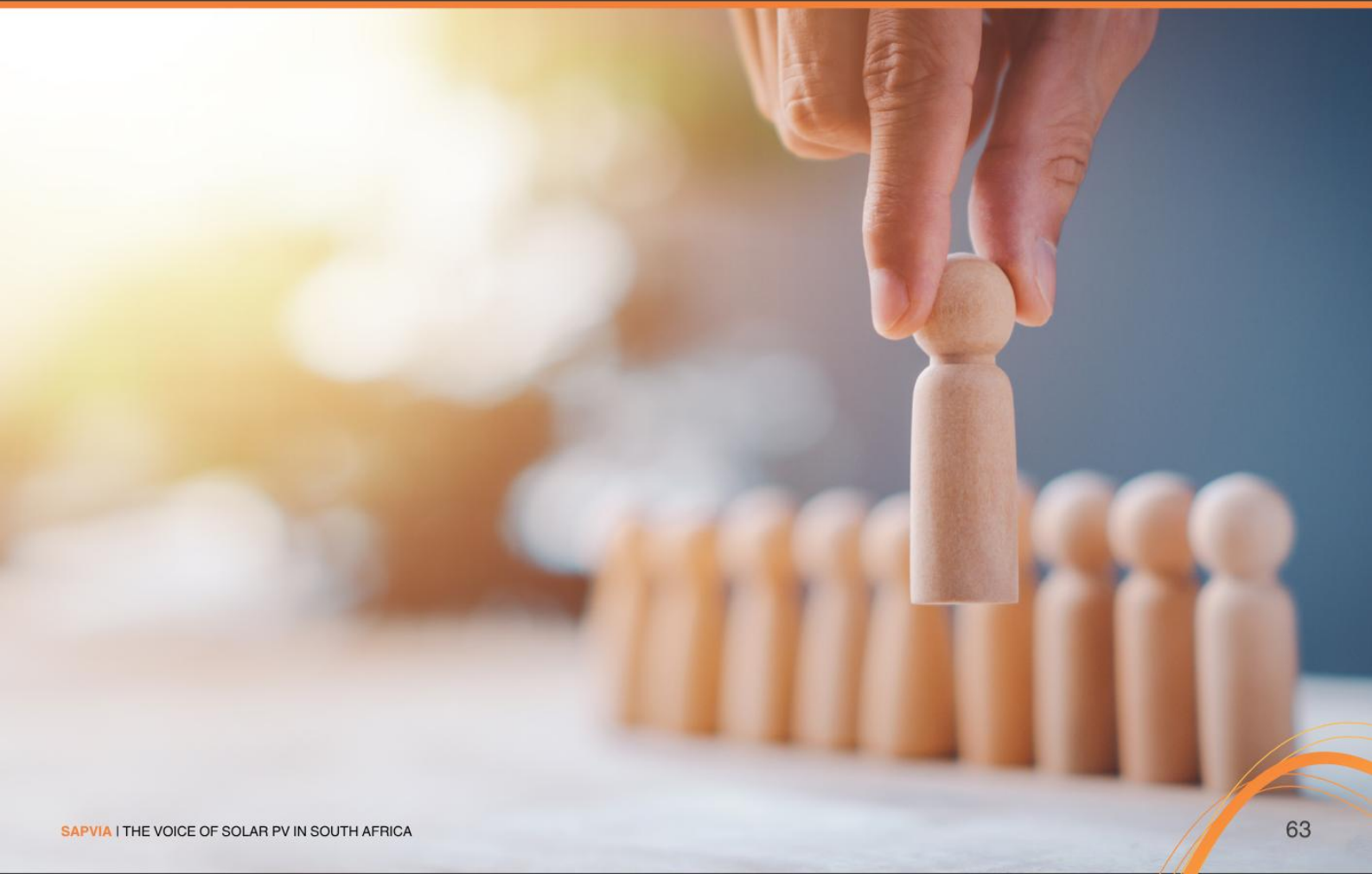
Wendy Mogale
Marketing & Communications
Specialist

Sinethemba Mnguni
Junior Technical
Specialist

Pamela Gama
Juniour Policy
Specialist



Thabang Molai
Intern



SAPVIA

South African Photovoltaic Industry Association

Financial Highlights

Adv.Mthokozisi Xulu
Treasurer at SAPVIA

Treasurer's Report

For the Financial Year Ending 31 March 2025

I am pleased to present the Treasurer's Report for the financial year ending 31 March 2025. The figures reflect SAPVIA's ongoing commitment to sound financial management and operational sustainability, even amid a challenging market environment.

Financial Year	2019/20	2020/21	2021/22	2022/2023	2023/2024	2024/2025
Income Statement	Audited	Audited	Audited	Audited		
Revenue	2 338 386,00	3 131 411,00	4 080 574,00	4 400 795,00	6 786 222,00	7 476 244,00
PVGC Revenue	136 705,00					
Sponsorship	53 662,00	756 765,00	385 000,00	1 437 737,00	397 795,00	334 528,00
PartnershipOther Income	-		2 696,00	14 231,00	1 959,00	200 000,00
Interest Received	56 584,00	47 079,00	84 189,00	224 337,00	480 832,00	569 943,00
Total Income	2 585 337,00	3 935 255,00	4 552 459,00	6 077 100,00	7 666 808,00	8 580 715,00
Operationg Expenses	- 2 583 763,00	- 2 700 814,00	- 3 302 649,00	- 5 674 308,00	- 6 497 878,00	- 7 486 038,00
PVGC Estimated Expenses	-289 131,20	304 539,00	92 541,00			
Surplus/Deficit	- 287 557,20	1 234 441,00	1 249 810,00	402 792,00	1 168 930,00	1 094 677,00
Balance Sheet	2020	2021	2022	2023	2024	2025
Assets	1 180 648,00	3 251 478,00	3 251 039,00	4 924 290,00	7 469 334,00	7 941 874,00
Liabilities	916 304,00	1 795 310,00	447 286,00	1 717 749,00	3 093 858,00	2 471 721,00
Equity	264 344,00	1 456 168,00	2 803 753,00	3 206 541,00	4 375 476,00	5 470 153,00

Financial Overview

Income Overview

10.2%

Increase in total income

Total income increased by approximately 10.2%, from R6.79 million in 2023/2024 to R7.48 million in 2024/2025. This growth is encouraging given the notable slowdown in the residential market. Despite the pressures, SAPVIA maintained solid revenue through strategic interventions, including membership fee adjustments and increased collaboration with stakeholders.

Expenditure and Surplus

15.2%

Increase in Operating expenditure

Operating expenditure rose by 15.2%, increasing from R6.50 million to R7.49 million. This increase is primarily due to the introduction of the Association's Gala Dinner, an expansion in the staff complement, and increased participation in industry events and stakeholder engagements. As a result, the annual surplus experienced a slight decline of 6.4%, moving from R1.17 million in 2023/2024 to R1.09 million in 2024/2025. This still represents a healthy margin, achieved through careful cost containment and prioritisation.

Statement of Financial Position

25%

Increase in retained income

Total assets grew by 6.3%, from R7.47 million to R7.94 million, reflecting improved liquidity and asset management. At the same time, total liabilities decreased by 20.1%, from R3.09 million to R2.47 million, due to the recognition of previously deferred income and improved financial discipline. Notably, retained income increased by 25%, from R4.38 million to R5.47 million, reflecting sustained operational surpluses.

SAPVIA remains in a strong financial position, with solid reserves and reduced liabilities. While income and surplus growth may not yet match our ambition, we are moving in the right direction and remain committed to responsible stewardship, transparency, and long-term sustainability.

I would like to thank the Board, the Secretariat, and all our members for their continued support and trust.

Adv. Mthokozisi Xulu
SAPVIA Treasure

The Year Ahead: Priorities & Progress

This year's progress has set the stage for even greater collective achievements. As we look ahead, our focus remains on creating tangible value for our members while advancing South Africa's solar revolution.

In the year ahead, SAPVIA will:

- Drive policy certainty by supporting finalisation of the IRP, IEP, and national wheeling framework.
- Improve grid access through expanded grid surveys and engagement with Eskom, NERSA, and NTCSA.
- Advance localisation by supporting SAREM implementation and promoting local PV component manufacturing.
- Scale skills development with a goal of certifying 5,000 new PV GreenCard installers, prioritising rural and youth inclusion.
- Enhance quality assurance through PV GreenCard 2.0 and improved training compliance.
- Deliver market insights via expanded data tools, research publications, and working group outputs.
- Promote inclusivity by driving transformation, supporting SMMEs, and expanding access to solar in underserved areas.

With renewed momentum, SAPVIA is ready to lead the solar PV sector through its next chapter—ensuring meaningful growth, resilience, and impact for South Africa.

Our Commitment to Progress

SAPVIA remains dedicated to:

- Delivering tangible value to our members and partners
- Promoting solar energy as the cornerstone of South Africa's energy security
- Creating an inclusive, sustainable energy future for all

SAPVIA will continue to lead with **innovation**, **inclusivity**, and **actionable partnerships**—ensuring solar energy powers not just homes and businesses, but South Africa's broader economic transformation.

Acknowledgments

To Our Members & Industry Partners:

SAPVIA's achievements in 2024/2024 would not have been possible without the active engagement of our members, whose expertise and dedication drive innovation and advocacy across the sector.

To Our Strategic Partners:
We extend sincere appreciation to [list key partners, e.g., government bodies, NGOs, sponsors] for their pivotal role in [specific initiatives, e.g., policy reform, training programs, or events like the Solar Show Africa].

To Our Team & Leadership:
A special acknowledgment to SAPVIA's Board, working groups, and staff for their tireless efforts in steering the association's mission forward.

To the Broader Renewable Energy Community:
Thank you to all stakeholders who continue to champion solar PV as a cornerstone of South Africa's just energy transition. Together, we are powering change.

We look forward to strengthening these partnerships in the year ahead as we work toward a more inclusive, resilient, and sustainable energy landscape.

Best Regards
SAPVIA

SAPVIA

South African Photovoltaic Industry Association

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Annexures

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