



Bundesministerium
für Wirtschaft
und Klimaschutz

Large PV roof-top systems

Legal framework and market dynamics in Germany

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Legal Framework in Germany

- No building permit required except for protected buildings (Denkmalschutz)
- Construction and Operation of RES are in the „overriding public interest“ and „serve public safety“ (§ 2 EEG)
- Priority for grid connection (§ 8 EEG)
- But: from 135 kW onwards technical requirements (NC-RfG)

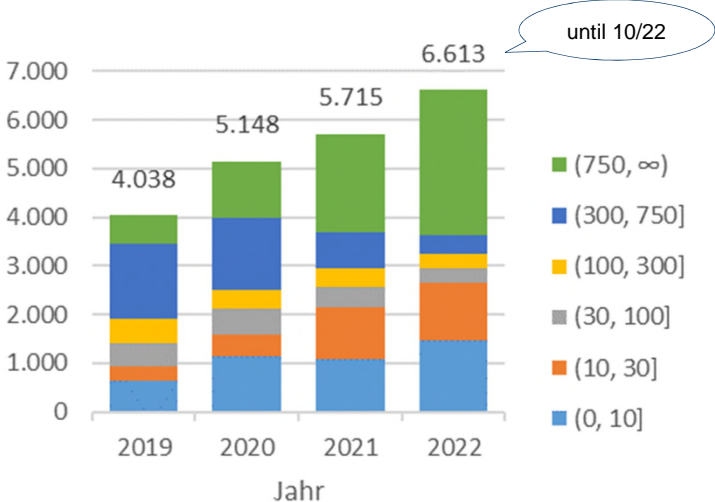
Support: EEG

- From 1.1.2023: Tender for Solar roof-top systems from 1 MW installed capacity (before 750 kW)
- Following table shows feed-in tariffs (calculated on a pro rata basis)

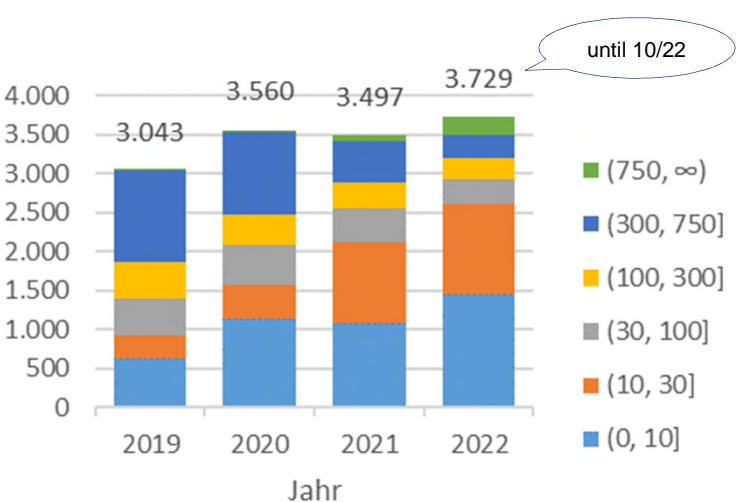
| Commissioning | Systems on residential buildings, noise barriers and other buildings (§ 48 para. 2 and 2a EEG 2023) | | | | |
|--------------------------------|--|-----------|------------|------------|----------|
| | bis 10 kW | bis 40 kW | bis 100 kW | bis 400 kW | bis 1 MW |
| from 01.01.2023 bis 31.01.2024 | | | | | |
| Partial feed-in | 8,60 | 7,50 | 6,20 | 6,20 | 6,20 |
| Full feed-in | 13,40 | 11,30 | 11,30 | 9,40 | 8,10 |

Market Development until 10/2022

All pv installations [MW]



Only pv roof-top installations [MW]



- strong growth of free-field-installations
- strong growth of small pv-installations

- shrinking market segments between 100 and 750 kW
- low growth of larger roof-top systems (tenders)

Main barriers

- Process initiated to identify main barriers:
 - Workshops organised to identify barriers
 - Analysis of statements and papers of associations
- Complicated EEG regulation & auctions until end of 2022: not suitable for large PV roof-top segment
- Increasing prices (supply-chain problems), increasing interest rates and increasing direct marketing costs
- Certification process for technical requirements slow (NC-RfG)
- Currently difficult investment conditions

Outlook

- Complicated support regulation -> *solved by EEG 2023*
 - Increasing costs -> *Processes to stabilize industry, inflation rates, supply chains*
 - Other barriers -> *PV Strategy*
- Currently working on a „PV Strategy“:
- will identify barriers and solutions
 - specify measures, e.g. for large roof-top PV

Thank you for listening!