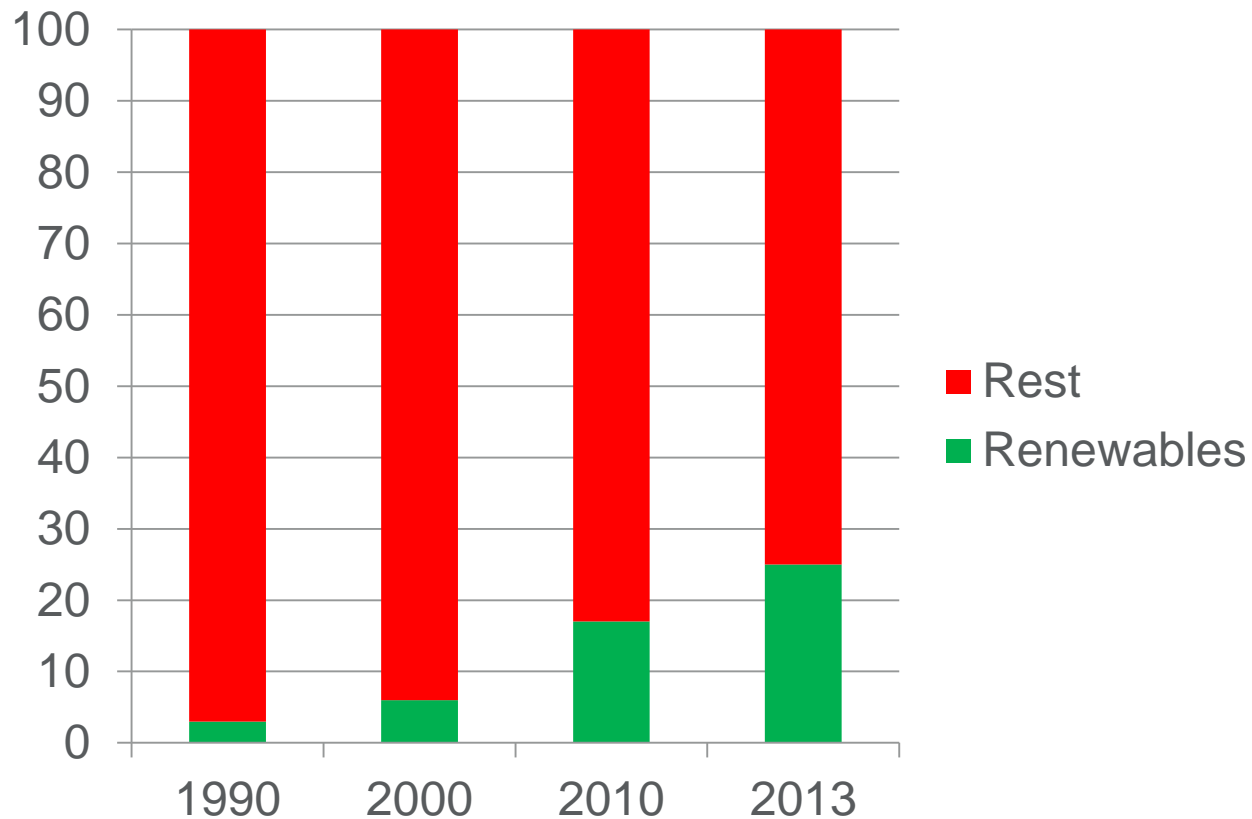


Input Presentation Intersolar Mumbai 2014

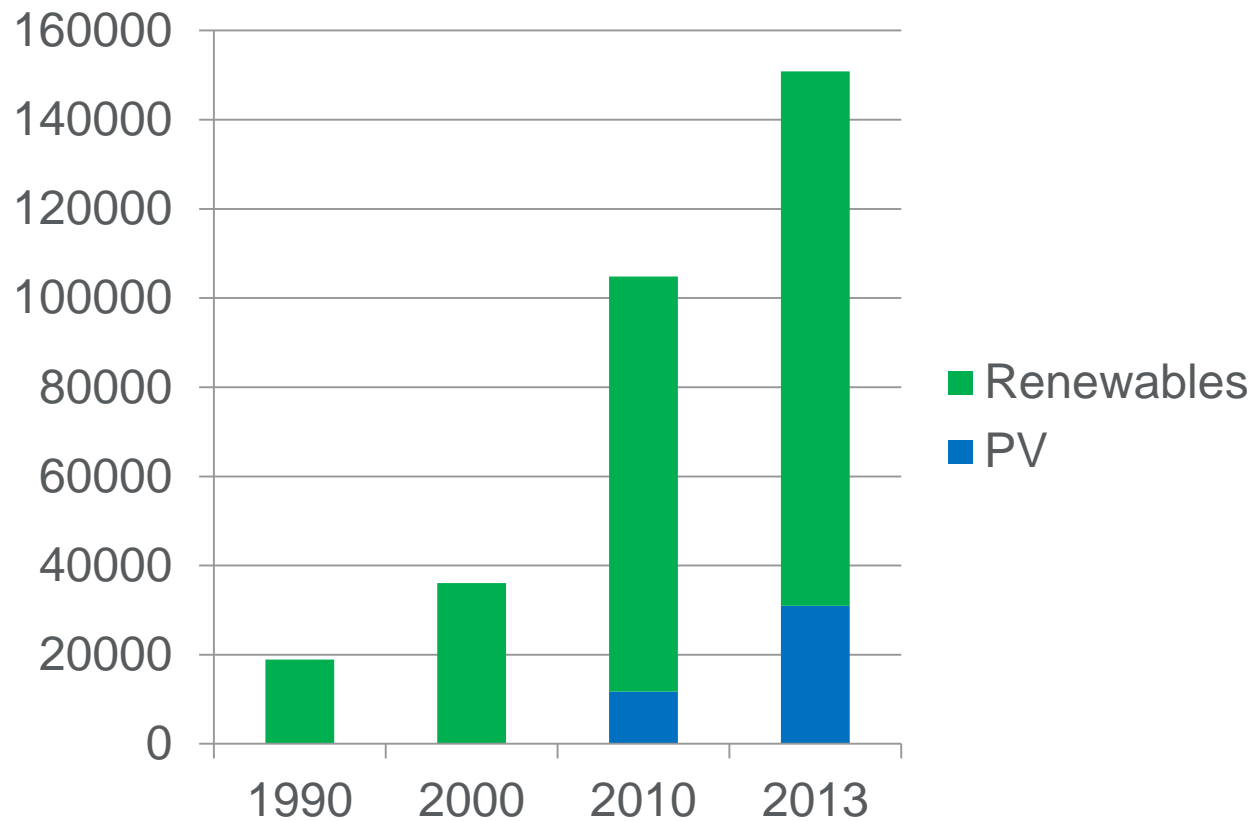
# THE GERMAN EXPERIENCE AND THE EFFECTS TO THE LABOUR MARKET

# Renewables share in electricity production in %



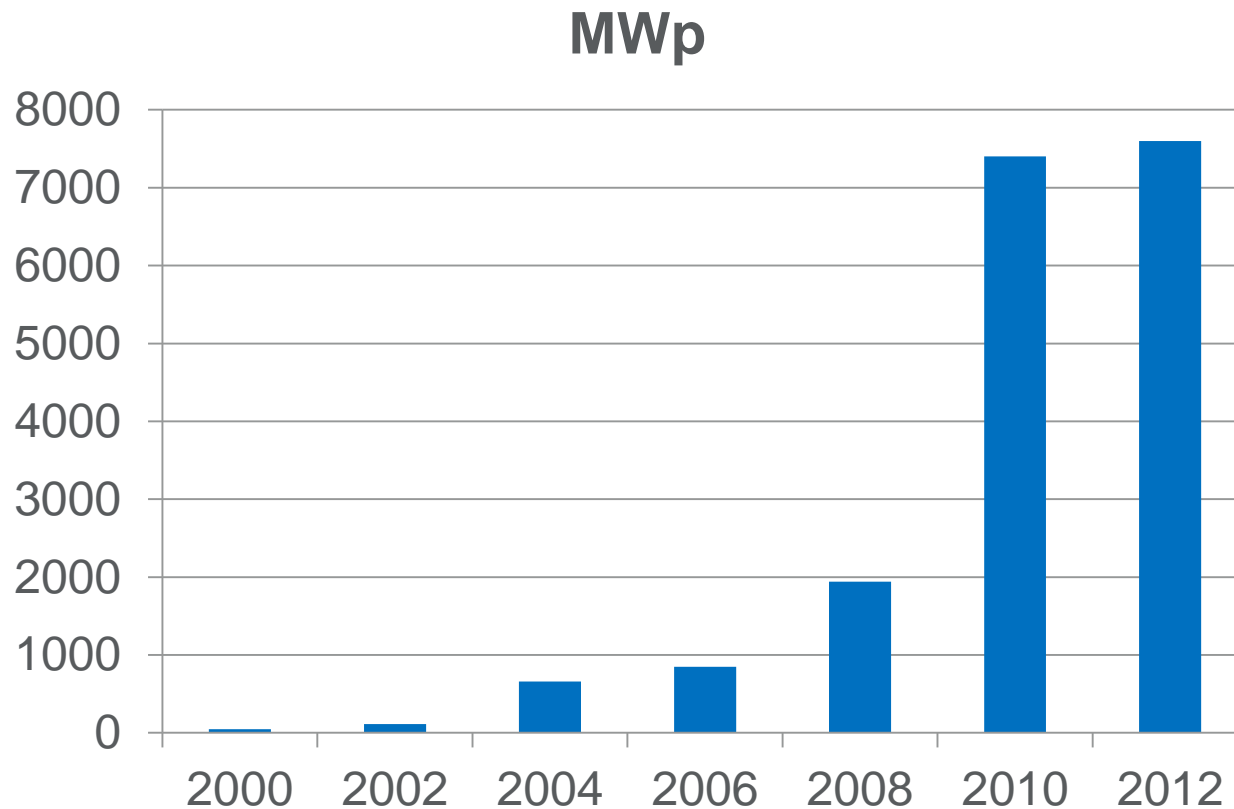
Source: BMWi

# Produced energy in GWh



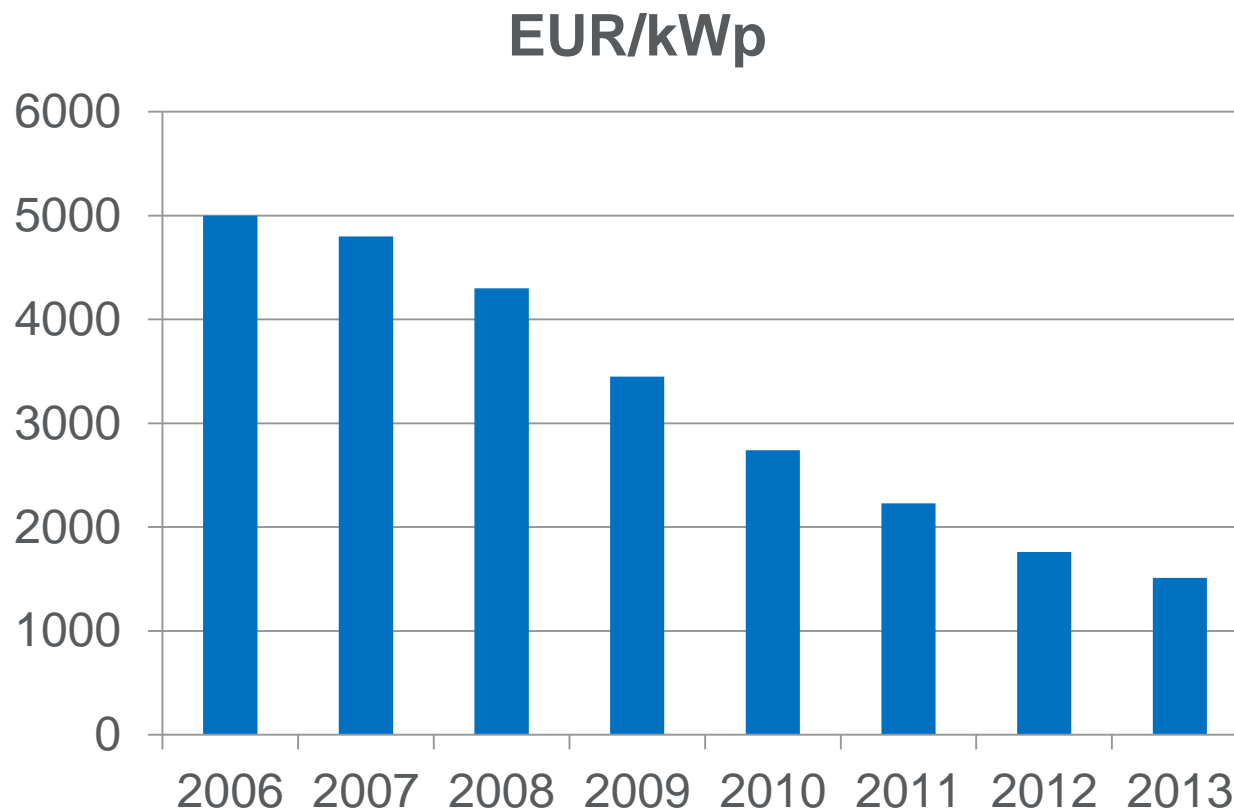
Source: BMWi

# New installed PV capacity



Source: BSW

# PV system prices for up to 100kWp

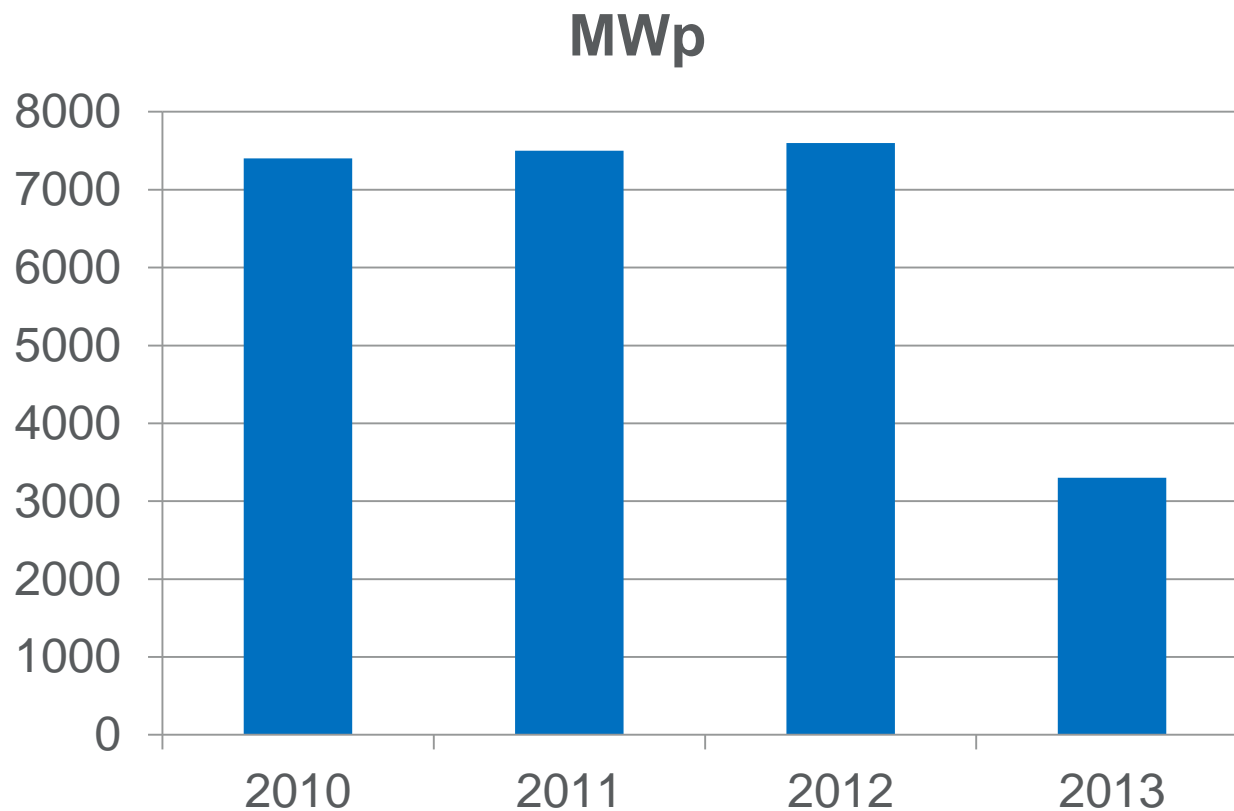


Source: Photovoltaikumfrage

# Milestones and impacts in PV market

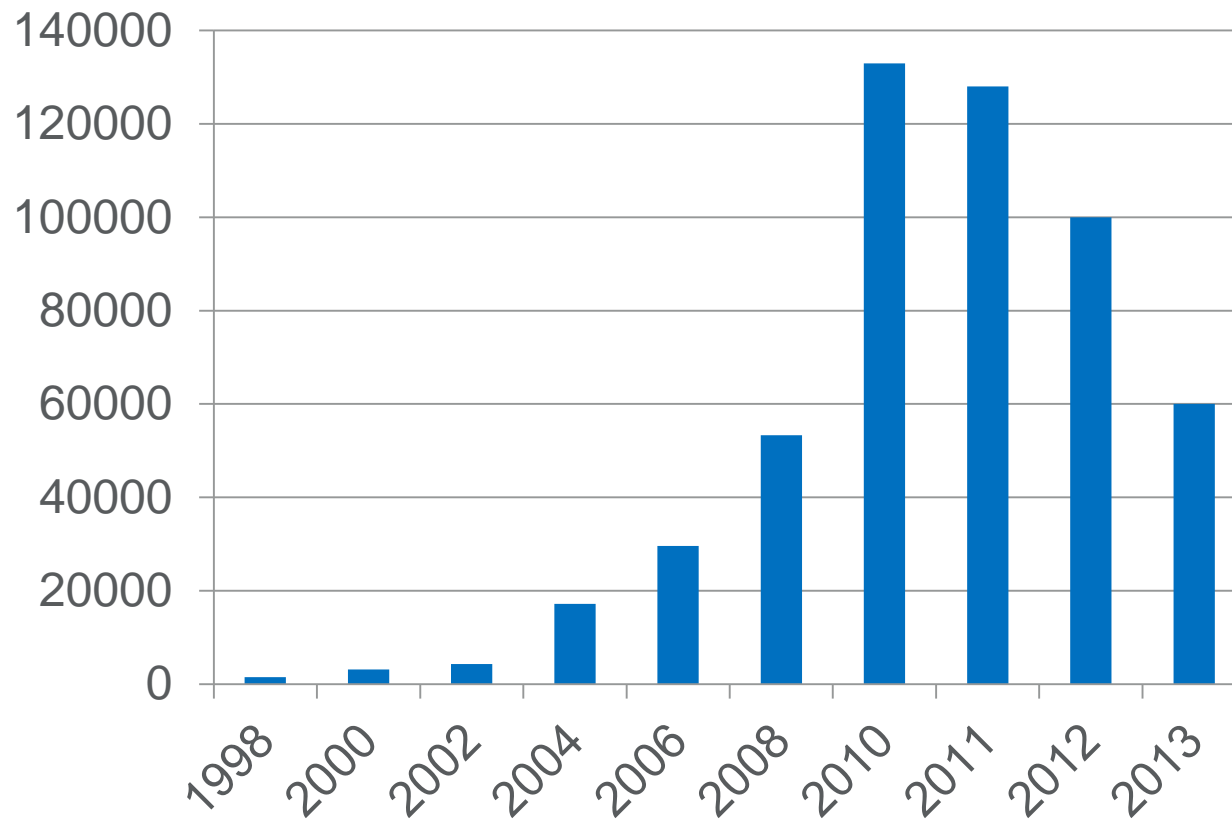
- Stromeinspeisegesetz 1991 – Fixed tariff system for Renewable Energies
- Erneuerbare Energien Gesetz 2000 – Improved fixed tariff system
- Photovoltaik Novelle 2012 – Drastic cut of tariffs
- 2013 antidumping duty against Chinese solar cells within EC

# New installed PV capacity



Source: BSW

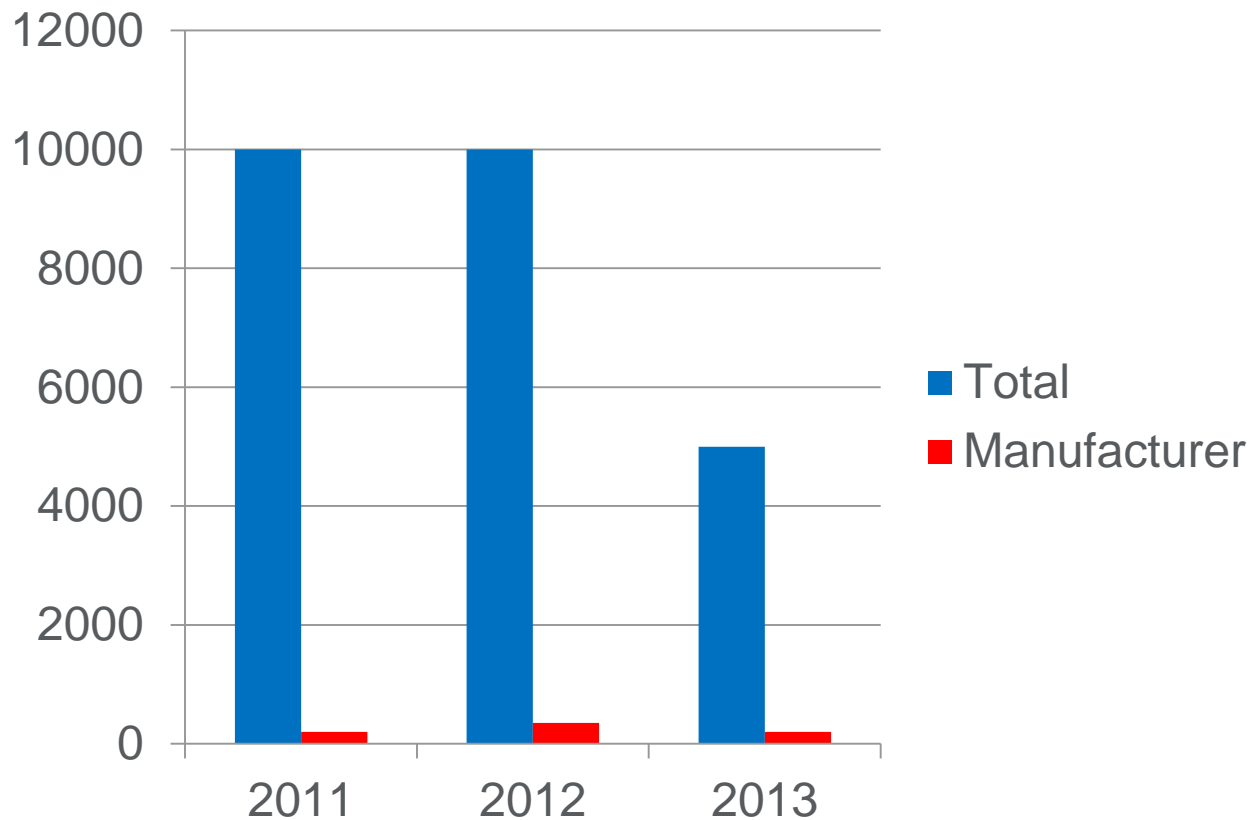
# Employees in PV business



Source: Statistica

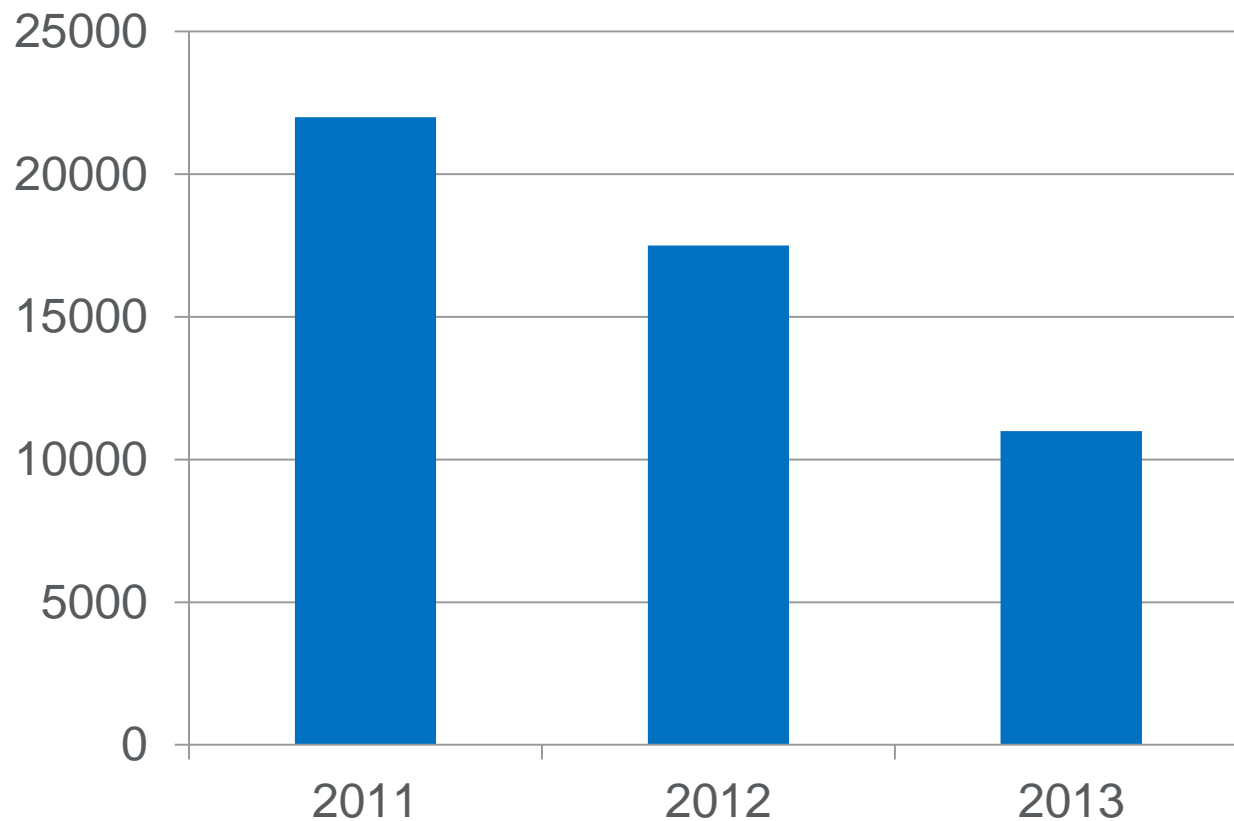


# Companies in PV business



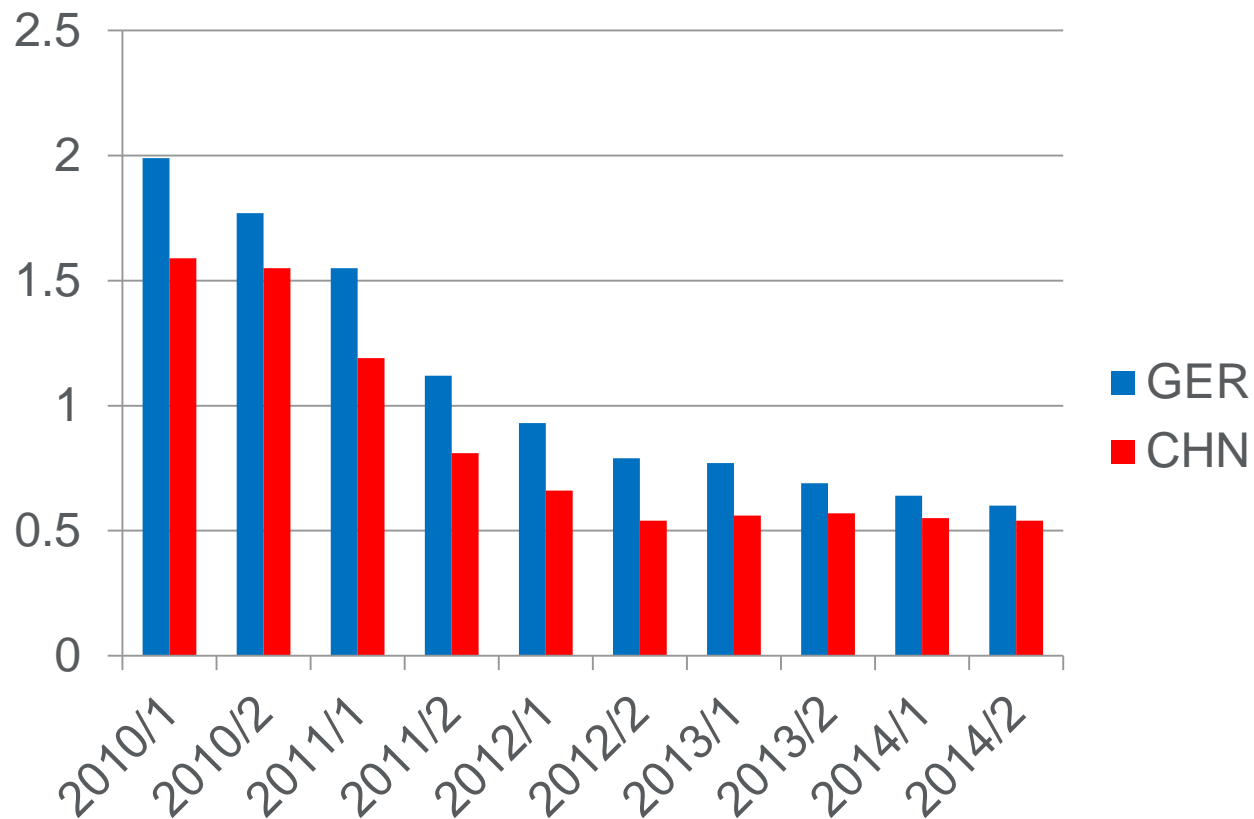
Source: BSW

# Employees of PV manufacturers (modules + inverters)



Source: BSW

# Module wholesale prices EUR/Wp



Source: pvXchange

# Results in German Market (tariff drop + Antidumping duty)

- Protection of manufacturers did not work so far
- No further price reduction for PV systems
- PV system prices higher than international market price: Not attractive for investors
- Drastic market drop
- Many insolvencies: Q-Cells, Solon, Centrotherm, Conergy, etc.
- Number of employees cut by 50%

# Open questions for Indian PV market

- Why protecting Indian solar module manufacturers?
- How to protect without creating higher system prices?
- How to support Indian manufacturers to be internationally competitive?
  
- DCR: Limited market, limited competition → Higher prices! Quality?

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