Global Solar Policy Tracker

Customer Service
Email: energycs@opisnet.com
North America
+1-888-301-2645 (toll-free within the U.S.)
International
+1-301-966-7270

OPIS A DOW JONES COMPANY

U.S. Policies

Region	State	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
State	California	Apr-2025	Net Metering Program (NEM 3.0); AB942	A bill proposes breaking 20-year contracts of legacy net-metering customers and moving their compensation structure to the less-lucrative rates established under the third iteration of the state's net-metering program, called NEM 3.0, which was approved in late 2022. Gov. Gavin Newsom issued an executive order in October that, in part, ordered the California Public Utilities Commission to identify underperforming programs and find ways to cut electricity bills. The CPUC released a report earlier this year saying that legacy net-metering contracts from before the 2022 rate change are costing state taxpayers $8.5 billion in additional energy bills. The bill, AB942, would force a change on those customers.	July 1, 2026 if enacted, for eligible customers who entered into a legacy contract. January 1, 2026 for customers who assumed a legacy net-metering contract through a property purchase.	Hearing scheduled for April 30 in front of the Assembly Committee on Utilities and Energy	State legislation	California has reduced its net metering program significantly in recent years. In late 2022, state energy regulators at the California Public Utilities Commission voted to approve the third iteration of the law, which lowered compensation rates by around 75%. The California Solar and Storage Association released a report saying change resulted in a 77% to 85% drop in rooftop solar sales in the state in 2023. Given California's dominance in this sector, that drop drove a decline in residential installations nationwide month-over-month of about 37%, SEIA reported in the third quarter of 2023. AB942, if passed, would be just the latest step away from that sector for the state.	Given the change in rates would apply to systems installed more than ten years ago and legacy contracts, it should not have significant impact on demand for residential and C&I-scale modules in the state.	Steve Campbell, Vote Solar Western Regional Director, issued the following statement: "Changing the rules after the fact isn't just unfair—it risks eroding public confidence in the integrity of California's regulatory system. More than a million Californians signed contracts and state-issued guides in good faith, trusting that regulators would keep their word. Retroactively breaking those agreements would set a dangerous precedent for all consumer protections in California." More than 100 organizations signed a letter urging lawmakers not to pass AB942: "California leaders should stop blaming consumers for the errors and missteps of the state's private utility companies and the inability for the CPUC to rein in their out of control spending. Reneging on two million contracts would not only be unfair but it would reduce energy choices for consumers, and threaten a promising solution to rein in future costs."	https://legiscan.com/CA/text/AB942/id/3189086
National		Apr-2025	AD/CVD	Department of Commerce issues final determination affirming allegations that Chinese solar suppliers in four southeast Asian countries participated in dumping behavior, or selling at less than fair value. The filing includes the final CVD and AD tariff rates that will apply if the ITC finds material injury to module manufacturers in the U.S. One of the petitioners in the case, the South Korea-based Hanwha Q Cells, is facing a 14.64% tariff on its modules produced in Malaysia. Jinko is facing a 40.3% tariff in Malaysia and a 244.95% tariff in Vietnam, where JA Solar is facing a 120.69% tariff. Trina was hit with a 375.19% tariff in Thailand and a 201.69% tariff in Vietnam, where Boviet was hit with a 307.78% rate. A handful of companies in Cambodia, including Hounen, are staring down a tariff of more than 3,500%. Non-specified companies could contend with tariffs to the tune of 651.85% in Cambodia, 375.19% in Thailand, 395.85% in Vietnam, and 34.41% in Malaysia.	June 9, 2025 pending the International Trade Commission's (ITC) final determination.	Ongoing - The ITC will issue its own final determination on June 2. If they affirm that the alleged activity has materially injured American manufacturers, the new boosted rates will take effect following an issuance of orders on June 9. If they don't find injury, the investigation is over.	Trade investigation	The filing brings the probe one step closer to completion. Tim Brightbill, attorney for the petitioners, has suggested an similar petition to investigate suppliers in Laos and Indonesia could follow if import data shows manufacturers have moved there to bypass new tariffs.	The AD/CVD investigation into solar suppliers in Vietnam, Malaysia, Cambodia and Thailand began a year ago, and many suppliers have since moved out of the subject countries into nearby countries in the region to continue selling to the U.S. In February, total module imports from the four countries in question totaled less than 1 GW, down from an April 2024 peak of more than 5.3 GW, according to an OPIS analysis of ITC data. The boosted tariffs, therefore, should not have a profound impact on module sales or their origin. However, the growth of new U.S. module production capacity that unfolded largely alongside the AD/CVD probe has left American suppliers still reliant on suppliers in the region for cells, namely Malaysia, meaning the rates could push prices up on U.S.-assembled modules.	Tim Brightbill, attorney for the petitioners, which include First Solar, Mission Solar, Meyer Burger, Qcells, and more, called the determination a "decisive victory for American manufacturing." At a hearing with the ITC prior to the release, Abby Hopper, President and CEO of SEIA, the industry's largest trade group, argued the expansion of American solar manufacturing is proof the domestic industry has not been harmed. The group has previously argued that steep tariffs -- and overall trade policy uncertainty -- on modules threaten climate and clean energy goals. In a social post highlighting her appearance at the hearing, Hopper said, We are in the midst of an American manufacturing renaissance. Lets take the win and simply let solar surge."	https://www.trade.gov/final-affirmative-determinations-antidumping-and-countervailing-duty-investigations-crystalline
National		Apr-2025	IRA	Federal judges order IRA funding unthawed. In response to a lawsuit from six non-profits, District Judge Mary McElroy of Rhode Island has ordered the EPA and other agencies to begin disbursing climate grants from the Infrastructure Investment and Jobs Act and the Inflation Reduction Act, claiming their pause as a result of a Trump executive order in January was unlawful. At the same time, District Judge Tanya Chutkan of D.C. ordered the release of around $625 million in climate grants through the so-called "green bank." Chutkan's order is now stayed, subject to appeal. McElroy applied her decision to all IRA and IIJA grants, not just those held in limbo for the non-profits: "It would be anathema to reasonable jurisprudence that only the named Nonprofits should be protected from the irreparable harms of the likely unlawful agency actions."	Apr-2024. McElroy granted a "preliminary injunction—a temporary court order requiring the agencies to turn the funding spigots back on, at least while their case is pending."	An appeals court stayed Chutkan's decision the following day, and upheld the stay later in the month. A hearing is set for May 19.	Judicial order	The executive order pausing allocated funds in the two Biden-era bills was one of Trump's first acts in office, and represented a shift away from Biden's climate policy. The pause, especially on the $7 billion Solar For All program, caused widespread uncertainty for project developers and communities expecting funds. The Trump administration's ability to unilaterally cancel funding going forward is called into question by the order. McElroy, a Trump appointee, said "broad powers that (the agencies) assert are nowhere to be found in federal law."		EPA Director Lee Zeldin made clear the agency will continue fighting the appeal, asserting the funds are liable to fraud and abuse. Regarding the stay to Chutkan's order, Beth Bafford, chief executive of Climate United, which recieved $7 billion in grants, told the NYT: "If this freeze continues, we will continue to lose trust, lose projects, and lose capacity to operate."	https://rhodeislandcurrent.com/wp-content/uploads/2025/04/gov.uscourts.rid_.59116.45.0.pdf https://www.scribd.com/document/851013697/circuit-court-stay

U.S. Policies												
Region	**State**	**Date of Update**	**Policy / Legislation**	**Policy / Legislation Detail**	**Expected Implementation Date**	**Status**	**Type of Policy**	**Impact on energy policy**	**Impact on solar markets**	**Reaction**	**Links/ Notes**
State	Texas	Apr-2025	Bill to place tighter restrictions on solar and wind projects	The bill would require renewable developers of projects over 10 MW to file an application for a determination of public interest with the Texas Public Utilities Commission before interconnecting to the grid, because "balancing private property rights, the need to increase electric generation, and the need to mitigate unreasonable impacts of renewable energy generation facilities on wildlife, water, and land in this state is in the public interest." The application must include, among other materials, authorization from the Texas Commission on Environmental Quality or the Parks and Wildlife Department. The bill would also nix property tax abatements for such projects, and set new setback minimums.	September 1, 2025 if enacted	Passed Senate vote 22-9, currently before State Affairs Committee in House	Proposed state legislation	If passed, the bill would mean stricter control over renewable projects for a state where solar and wind so far thrived. Taken in combination with Senate Bill 388, which is also before the State Affairs Committee and seeks to require 50% of all new generation capacity in the state's energy grid to come from "dispatchable" resources, it could spell a high water mark and eventual slowdown of solar installations that have made Texas' deregulated market a renewable energy leader in the U.S.	Texas ranks only behind California in solar installations to date, with more than 41 GW currently on the grid, largely thanks to its deregulated and competitive market. Adding more steps and restrictions along the path to operation for certain technologies could slow development forecasts there, which the Solar Energy Industries Association (SEIA) projects as another 41 GW over the next half-decade.	Daniel Giese, SEIA's director of state affairs in Texas, issued this statement: "With energy demand rising fast, Texas needs every megawatt it can generate to keep the lights on and our economy strong. We cannot afford to turn away from the pro-energy and pro-business policies that made the Lone Star State the energy capital, but that's exactly what SB 819 does. Solar is a $50 billion industry in Texas and is one of the fastest and most affordable sources of energy to build. We urge the Texas House to reject this bill." In testimony to the Senate, Jeff Clark, President of the Advanced Power Alliance in Texas, said "Senate Bill 819 is designed to stop renewable energy development… everywhere in Texas. If it was intended to protect wildlife and to preserve habitat and sensitive areas, it would apply to all activity, including the most dangerous, most polluting, and most disruptive forms of development."	https://capitol.texas.gov/BillLookup/History.aspx?LegSess=89R&Bill=SB819
National		Apr-2025	Bill to phase out Investment Tax Credit (ITC) and Production Tax Credit (PTC) by 20% over five years	Rep. Julie Fedorchak of North Dakota proposed the bill, dubbed the "Ending Intermittent Energy Subsidies Act," saying that wind and solar are "no longer emerging technologies—they're mature, market-proven, and widely deployed." Their incentivization distorts the market in a time when new dispatchable baseload generation is needed for grid stability, Fedorchak said. The bill would also end transferability. No changes would be made to the tax credits as applied to other forms of electricity production like nuclear, hydropower, and geothermal.	If made law, the phase down "shall apply to taxable years beginning after" its enactment.	Proposed	Proposed federal legislation	Since Trump's election, the solar industry has agonized what changes the new administration would make to Inflation Reduction Act tax incentives. But in recent months, most policy watchers believed modifications would come through the budget process. Fedorchak's bill was introduced the same day the House voted to approve the Senate's budget framework and Speaker Mike Johnson expressed hope of getting a bill to the President's desk by Memorial Day, suggesting the GOP could try to modify the IRA outside of those proceedings, or at least kick the issue down the road for the time being. However, Rep. Chip Roy, in explaining his vote for the Senate framework, said Trump and party leaders assured him they would commit to deeper cuts, including "efforts to fully repeal the damaging 'green scam' subsidies in the Inflation Reduction Act."	Any change to the IRA's tax incentives would mean a slowdown in solar installations and domestic solar manufacturing, as the tax credits have driven record amounts of both in recent years. The mere threat of change drove some companies over the winter to safeharbor their eligibility by spending at least 5% of their projected project costs on modules and other equipment, or starting work on-site. Changes to the tax credits would lower demand for domestic content modules, which could scuttle some manufacturing plans in the U.S.	The proposed bill did not recieve much reaction. The month prior, some Republican lawmakers expressed unease with efforts to dismantle or modify the tax credits in a letter to Speaker Johnson.	https://fedorchak.house.gov/sites/evo-subsites/fedorchak.house.gov/files/evo-media-document/fedorchak-ending-intermittent-energy-subsidies-act-of-2025.pdf
National		Apr-2025	"Reciprocal" tariffs	The United States has applied 'reciprocal' tariffs to nearly all global trading partners. Southeast Asia countries with major solar manufacturing capacity were hit with the highest "reciprocal" tariff rates announced Wednesday by President Trump on scores of trading partners as part of a sweeping push to "strengthen the international economic position of the United States and protect American workers." Polysilicon and wafers are on the list of exempted goods; modules and cells are not.	April 5, 2025 - 10% general rate April 9, 2025 - "Reciprocal" rates April 10, 2025 - 90-day pause on "Reciprocal" rates alone July 9, 2025 - Last day of 90-day pause on "Reciprocal" rates	General rate still in place "Reciprocal" rate paused	Executive Order	Some relevant rates are as follows: Laos (48%), Cambodia (49%), Indonesia (32%), India (26%), Vietnam (46%), Thailand (36%), Malaysia (24%), China (34%) and South Korea (25%). Most rates are additive to existing tariffs, though Canada and Mexico are exempt as long as the 25% rate announced in February remains in place, and the new rates do not apply to goods already targeted for sector-specific tariffs like steel and aluminum.	The price of modules imported from Laos, Indonesia and India is likely to see a noticeable jump (with one source saying he expects a hike of $0.05/wp "if not more"), the reciprocal tariffs are not exactly cause for celebration for U.S. module assemblers, who are still largely reliant on imported cells and will face much of the same price pressure. A source with a leading Chinese module supplier called the current situation "a mess." The CEO of a company producing domestic content modules in the U.S. told OPIS he felt "too much of anything is never good." "Right now everyone is assessing their inputs and does not matter if they are imported or domestic – the domestic components are ALSO going up in price at par with their imported competition," the CEO said. "Too early to say the exact effect besides that all costs are going up."	Many market sources said they are still assessing the fallout of the situation, and solar trade groups like Solar Energy Industries Association (SEIA) and Solar Energy Manufacturers for America (SEMA) Coalition did not issue statements on the news.	https://www.whitehouse.gov/presidential-actions/2025/04/regulating-imports-with-a-reciprocal-tariff-to-rectify-trade-practices-that-contribute-to-large-and-persistent-annual-united-states-goods-trade-deficits/
State	Texas	Mar-2025	Bill on new generation capacity	Texas has passed a bill requiring 50% of all new generation capacity in the state's energy grid to come from "dispatchable" resources other than battery storage. If passed, utilities and power generators would need to satisfy the 50% rule or else purchase dispatchable generation credits through an ERCOT trading program. According to the text, the bill's intent is to "encourage the development, construction, and operation of new natural gas energy projects ... that have the greatest economic potential for capture and development of this state's environmentally beneficial natural gas resources."	Jan 1, 2026	Referred to the State Affairs Committee on April 22. Sent to Texas House for consideration on March 20. If passed, the bill would go to Gov. Abbott's desk for signing.	State legislation	Texas trails only California as a leading state for solar development, owing to abundant land and sun, as well as a deregulated energy market and an interconnection process generally considered less burdensome compared to other regional grids. If passed, SB388 directs the state Public Utilities Commission to implement a credit trading program if it "determines that dispatchable generation may provide less than 55 percent of all new generating capacity installed in the ERCOT power region after January 1, 2026." The bill would in effect subsidize more traditional forms of generation and acknowledge solar and other renewables' cost advantage on the open market.	If passed, the bill would likely slow the rate of new solar development in the state, as utilities would be required to balance new renewable capacity additions with natural gas projects. According to SEIA, there is 41 GW of solar installed in the state at the moment and another 41 GW are expected to come online over the next five years, as costs have dropped 42% in the last decade.	State Senator Phil King said the bill is a flawed approach to the real issue of grid stability, and recommended a 'no' vote: "Instead of allowing free-market competition to determine the best energy mix, the bill picks winners and losers by mandating an artificial share of dispatchable energy while ignoring the root cause of the problem: federal and state renewable energy subsidies." Texas energy analyst Doug Lewin, in his newsletter, predicted that the 35% increase in power generation Texas has seen in the last four years would be less than 10% in the next four years. "It is the most heavy-handed, anti-market kind of legislation," Lewin said.	https://legiscan.com/TX/text/SB388/2025

U.S. Policies											
Region	**State**	**Date of Update**	**Policy / Legislation**	**Policy / Legislation Detail**	**Expected Implementation Date**	**Status**	**Type of Policy**	**Impact on energy policy**	**Impact on solar markets**	**Reaction**	**Links/ Notes**
National		Mar-2025	Amendment to Defense Production Act (DPA)	President Trump rolled back a Biden-era order qualifying solar components for support under the Defense Production Act (DPA), saying the rescission restores "common sense to the Federal Government." Biden's 2022 order of the DPA framed the invocation for solar — along with heat pumps, fuel cells and more — as a bid to boost production and safeguard national security.	Immediate	In effect	Executive Order	The IRA appropriated some $500 million for the executive branch to deploy under the DPA to boost production in key industries. But according to the "IRA Tracker" run by Columbia University's Law School, the funds had to be spent by September 2024. DOE allocated roughly $254 million, and DOD allocated roughly $155 million for "critical mineral supply chain development," by the deadline. No funds remain as the deadline has passed, according to Columbia. If new money is appropriated for the DPA, solar component manufacturers would not be eligible.	The impact appears mostly limited, as the money in question is dwarfed by the tax credits in the IRA, which total more than $270 billion and are being watched anxiously by all sectors of the solar market. Considering it was the administration's first swipe aimed exclusively at the solar industry, the executive order could be significant as a sign of things to come.	Reaction to the move was muted. Major solar trade groups like Solar Energy Industries Association (SEIA) and Solar Energy Manufacturers for America (SEMA) Coalition did not react to the executive order.	https://www.federalregister.gov/documents/2025/03/20/2025-04866/additional-rescissions-of-harmful-executive-orders-and-actions
National		Mar-2025	AD/CVD post-preliminary rate increases	DOC released its preliminary determinations in a countervailing duty (CVD) case filed on solar suppliers in four Southeast Asia countries (Cambodia, Malaysia, Thailand, and Vietnam) on October 1. Petitioners filed additional subsidy allegations against suppliers in Vietnam and Malaysia regarding the cross-border provision of Chinese solar wafers, silver paste and solar glass for "less than adequate remuneration." Commerce officials confirmed their findings in March.		Ongoing - Final determinations of the AD/CVD investigation are expected in April 2025.	Trade investigation	Trade officials filed preliminary determinations into the AD/CVD case in the fall, and have hiked rates four times since following new allegations of unfair market activity. The investigation is scheduled to wrap up in April.	Companies impacted by the CVD rate increase include JA Solar, Boviet, Jinko and Trina in Vietnam, and Jinko in Malaysia. Although the most recent rate increase was more drastic for some companies--Boviet for example, saw its rate increase from 0% to 157%--the overall impact should be limited. Considering anti-dumping rates established in the fall, and the general risk of doing business in the four subject countries under U.S. scrutiny, the investigation has all but re-shaped the global supply chain already. Imports from the countries dropped 87-99% from January 2024 to January 2025, according to the petitioners, and companies have largely relocated to Laos and Indonesia to continue selling into the U.S.	Following similar increases filed in February, attorney for the petitioning companies Tim Brightbill said, "After the initial anti-dumping (AD) and countervailing duty (CVD) findings were released, we predicted the tariff rates would rise as more data became available ... We expect these strong results to continue when the final decisions are announced in April."	https://americansolartradecmte.org/press-release-latest-solar-import-data-show-preliminary-tariffs-from-solar-ad-cvd-case-are-working/
National		Feb-2025	Tariffs on aluminum and steel	President Trump signed executive orders modifying Section 232 tariffs first established in 2018 on steel (25%) and aluminum (10%). The order brings the aluminum tariff to 25%, ends country-specific exemptions to the tariffs and terminates the product exclusion process.	March 12, 2025	In effect	Executive Order	The proclamations state that the intent behind the modifications are to protect U.S. national security and "allow U.S. aluminum producers to restart production and to incentivize new capacity."	The new tariff could raise prices on solar projects, as aluminum is the primary material used in the manufacture of frames for solar modules, and both steel and aluminum are used to make mounting, racking, and other components.	- Distributors tell OPIS they expect the news could raise prices on module imports in the coming months. - Origami Solar, the only steel frame manufacturer in the U.S., used the news to announce the start of production at its Arkansas facility. - Heliene announced a deal to use Origami's frames in its domestic content modules starting in April.	https://www.whitehouse.gov/presidential-actions/2025/02/adjusting-imports-of-aluminum-into-the-united-states/ https://www.whitehouse.gov/presidential-actions/2025/02/adjusting-imports-of-steel-into-the-united-states/
National		Jan-2025	"Unleashing American Energy"	President Trump signed the executive order which, among other measures, requires all federal agencies to immediately pause disbursement of funds allocated under Inflation Reduction Act and the Infrastructure Investment and Jobs Act, and "review their processes, policies, and programs for issuing grants, loans, contracts," and more.	Immediate	In effect	Executive Order	The order represents a break with the climate and clean energy agenda of the Biden administration, abolishing the White House Office on Clean Energy Innovation and Implementation, which was established by Biden's order to oversee the "policymaking process with respect to implementing the energy and infrastructure provisions" in the IRA.	While the tax credits that have been the major drivers of new demand in recent years are not covered by the funding pause, the order has the solar industry on edge, as they wait to see what, if anything, is done to the ITC, the PTC, the domestic content bonus, and clean energy manufacturing tax credits. Resciding or modifying those tax credits will include Congressional approval. Companies continue to safe harbor their projects, hoping to lock in ITC eligibility before any modifications are made to the incentive.	-Since the passage, states have noted their inability to access funds through the Department of Energy's low-income Solar For All program. -Solar trade groups organized a "lobbying blitz" in Washington D.C. in early February to stress the importance of clean energy tax credits in the IRA, which are helping to reduce "U.S. reliance on foreign adversaries," employing Americans, and supplying the grid with low-cost power, the Solar Energy Industries Association (SEIA) said in a release. The organizations that took part in the meetings with lawmakers represent more than 2000 energy companies.	https://www.whitehouse.gov/presidential-actions/2025/01/unleashing-american-energy/
National		Jan-2025	IRA - Domestic Content Bonus Credit. Notice 2025-08	Treasury releases update to Elective Safe Harbor guidance on Domestic Content Bonus Credit Amounts outline in Notice 2024-41. The Assigned Cost Percentages to Solar PV is now distinguished between PV Ground-mount projects and PV Rooftop projects, with additional associated cost percentages for modules using c-Si PV cells with domestically produced wafers. Additional clarity on floating solar projects	Dec 31, 2024	Law - Public Law No: 117–169, Inflation Reduction Act of 2022	Tax incentive	The update also includes: - Modifications to naming in Land-based Wind components, though associated cost percentages are unchanged - Updated assigned cost percentages for the manufactured components relating to the Battery Electric Storage System (BESS) - Qualifying facilities placed in service after Dec 31, 2024 can use the updated classifications to qualify for domestic content bonus - Updated definitions for applicable projects	The Updated Assigned Cost Percentages for Solar PV account for the expected significant cost premium for domestic wafers. The guidance's explicit aim is to spur new wafer capacity in the U.S. The lack of accuracy in the previous classification risked under-crediting a component created domestically, while over-crediting other components.	Mike Carr, Executive Director of the Solar Energy Manufacturers for America (SEMA) Coalition, said the inclusion of wafers in the guidance is significant, but the overall approach is "overly complicated." A developer source was also skeptical that the updated guidance would kickstart new manufacturing, noting the long lead times needed to plan and build wafer facilities, and the ability to hit domestic content thresholds with the existing safe harbor tables.	https://home.treasury.gov/news/press-releases/jy2788
National		Nov-2024	AD/CVD	U.S. Department of Commerce has imposed preliminary anti-dumping rates on solar manufacturers in 4 SE ASian countries (Cambodia, Malaysia, Thailand and Vietnam) in an ongoing antidumping/countervailing duties (AD/CVD) investigation. These findings are separate from the preliminary findings issued in October 2024.	Nov 29, 2024	Ongoing - Final determinations of the AD/CVD investigation are expected in April 2025.	Trade investigation			There's a general sense that rates are higher than expected and could lead to a jump in import prices, but also potentially a hike in prices across the board as unaffected companies could look to take advantage of the situation.	https://www.trade.gov/preliminary-determinations-antidumping-duty-duty-investigations-crystalline-photovoltaic-cells

U.S. Policies

Region	State	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
National		Oct-2024	AD/CVD	U.S. Department of Commerce has imposed preliminary anti-dumping rates on solar manufacturers in 4 SE ASian countries (Cambodia, Malaysia, Thailand and Vietnam) in an ongoing antidumping/countervailing duties (AD/CVD) investigation.	Oct 1, 2024	Ongoing - Final determinations of the AD/CVD investigation are expected in April 2025.	Trade investigation		The filings affirm petitioners' claim that that solar manufacturers in SE Asia benefit from "unfair subsidies," including "cross-border" support from the Chinese government, as part of the ongoing AD/CVD investigation. The decision sets new tariff rates. Expected price hikes on imported modules have yet to materialize in a major way, as manufacturers have re-established plants in other non-subject countries in the region, like Laos and Indonesia, and global oversupply has persisted.	The reaction from the solar industry was muted, as AD tariffs were still outstanding at the time, and anti-dumping rates are generally the most impactful. The biggest news was the affirmation of critical circumstances allegations, which allow the rates to be levied retroactively on Thailand and Vietnam going back 90 days, a prospect that loomed anxiously over the industry during the summer.	https://www.trade.gov/commerce-preliminary-countervailing-duty-investigation-crystalline-photovoltaic-cells-cambodia
State	Massachusetts	Nov-2024	Massachusetts S.2967, Act promoting a clean energy grid, advancing equity, and protecting ratepayers	Governor Maura Healey signs Climate Law 'to advance clean energy transition, create jobs, and lower costs.' The legislation includes major reforms to the siting and permiting process for wind, solar, storage, and other electric infrastructure like substations and transmission, including establishing a 12-month deadline for municipal permitting. State permits will be issued together by the Energy Facilities Siting Board (EFSB) after a 15-month period.	Nov 21, 2024	Law	State legislation	Other key measures include the expansion of offshore wind tax credits, an increase in the maximum length of offshore wind and battery contracts to 30 years from 20, authorizing gas companies to sell geothermal heat which was previously restricted under company definitions, and updating appliance standards around electric vehicle chargers to improve access	The law should provide solar developers in the state with much-needed clarity around project timelines, allowing for more deployment. The bill also directs utilities to solicit for new battery storage resources, which could provide the grid stability needed for new renewable projects.	Business leaders largely welcomed a quicker and more streamlined permitting process	https://www.mass.gov/news/governor-healey-signs-climate-law-to-advance-clean-energy-transition-create-jobs-and-lower-costs
State	Michigan	Nov-2023	Michigan Public Act 233 of 2023	Law allowing state of Michigan to overrule local objections to the siting of large scale solar (>50MW) and wind (>100MW) projects came into effect.	Nov 29, 2024	Law	State legislation	Aim to fasten deployment of renewable energy by speeding up approvals. Michigan law requires all energy produced in the state to be 'clean' by 2040.	Local opposition to renewable projects has been effective at blocking local permits necessary for the construction of solar projects. In recent years, pushback has been especially vocal in Midwest states. This law should give developers and landowners who have opted in to wind and solar projects some security in Michigan. The framework was first demonstrated by New York's Office of Renewable Energy Siting, among the country's leaders in solar deployment.	Nearly 80 Michigan counties and townships are suing the state regulator Michigan Public Service Commission's (MPSC) effort to implement the law.	https://www.legislature.mi.gov/documents/2023-2024/publicact/htm/2023-PA-0233.htm
National		Dec-2023	IRA - 45X Advanced Manufacturing Production Tax Credit	The U.S. Treasury has released the final rules for the locked in rates for the 45X first established Inflation Reduction Act, which allows a tax deduction based on the amount of eligible components sold in a year. The final rates: $3 per kilogram of poly; $12 per square meter of wafers; the product of $0.04 multiplied by the cell's capacity; and the product of $0.07 multiplied by the module's capacity	2022, phase out to begin in 2030	Law - Public Law No: 117–169, Inflation Reduction Act of 2022	Tax incentive		The passage of the 45X credit two years ago has already resulted in record amounts of new module production in the U.S., but the confirmation of rates could provide an added sense of security for companies banking on the credit.		https://www.federalregister.gov/documents/2024/10/28/2024-24840/advanced-manufacturing-production-credit
National		Oct-2023	CHIPS Act of 2022 - Advanced Manufacturing Investment Credit, Section 48D and 50	U.S. Treasury expands definition of 'semiconductor' to encompass ingots and wafers, which qualify these manufacturers for the 25% Advanced Manufacturing Investment Credit. The incentive is available for facilities that start construction before end of 2026.	Dec 23, 2024	Law - Public Law No: 117-167, Chips Act Of 2022	Tax incentive	While the focus on the Chips Act is to promote domestic semiconductor chip manufacturing, the modifications include provisions to incentivize the domestic production of solar ingots and wafer crucial to solar panel manufacturing.	Ingot and wafer component production have lagged in the U.S. solar supply chain, compared to the boost given to module assemblers by the Inflation Reduction Act. Access to the credit could be the push needed for producers to set up shop in the U.S. According to the SEIA, since the passage of the Inflation Reduction Act, there have been 21 GW of wafer announcements and 10 GW of ingot announcements, yet only 3.3 GW of ingot and wafer capacity is now being built.	The SEIA said the final rules will encourage the upstream development of the solar supply chain, as the U.S. currently has no ingot and wafer production in operation.	https://www.federalregister.gov/documents/2024/10/23/2024-23857/advanced-manufacturing-investment-credit-rules-under-sections-48d-and-50

Europe Policies

Geography	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
European Union	Apr-2025	E.U. Response to U.S. Tariffs	The U.S. has paused a 20% "reciprocal" import tariff on almost all EU exports to the U.S. until July 9, but a baseline 10% tariff remains. The EU already faces 25% tariffs on steel, aluminium and automobiles. The bloc had been discussing counter measures which included plans to charge import duties of up to 25% on selected list of U.S. products, but this is on pause in response to the U.S.'s "90-day pause". The single market is instead discussing incentives for tariff negotiations, and potential retaliatory tariffs, if negotiations fail. Incentives: "Zero-for-zero" duty on industrial goods, lower car import duty, increased energy investment, easing EU regulations. Potential retaliatory tariffs, if negotiations fail: slapping tariffs on a new list of U.S. goods (specific goods not detailed) over targeting services like Big Tech or Wall Street.	April 5, 2025 - 10% general rate April 9, 2025 - "Reciprocal" rates April 10, 2025 - 90-day pause on "Reciprocal" rates alone July 9, 2025 - Last day of 90-day pause on "Reciprocal" rates EU - U.S. Tariff Negotiations: Preparations Ongoing	Tariff Negotiations: Preparations Ongoing	Tariff Response/Trade Policy	Higher import costs for key components needed to fuel Europe's energy transition is putting the region's renewables goals at risk, with the industry citing the need for a resilient supply chain. Automotive and EV associations (e.g. ACEA, AVERE) have also highlighted that 25% U.S. duties on EU cars will disrupt integrated supply chains for electric vehicles.	According to an OPIS survey, the immediate impact of the new U.S. tariffs on solar PV will be limited as Chinese manufacturers are not reportedly needing to dump excess inventory in Europe. However, growing uncertainty resulting from the tariff announcement has created a cautious "wait-and-see" approach among European renewable energy source (RES) investors and developers, which could slow the development of new solar projects. However, other markets, such as Malaysia and India, could expand their solar manufacturing and introduce a new competitive dynamic to Europe's solar industry.	EU solar sector exports to the U.S. are small in general but could be significant for individual companies involved in inverter and BOS activities. Members of SolarPower Europe are not expecting any big changes given existing U.S. trade policies on Southeast Asia's solar industry (Section 301), however there is concern that an EU response to the U.S. tariffs could inflict further harm on EU manufacturers.	https://ec.europa.eu/commission/presscorner/detail/en/ip_25_740
Germany	Apr-2025	German Coalition Agreement: 'Responsibility for Germany'	Germany's newly-elected CDU/CSU and SPD coalition government presented their five-year action plan: a) Emphasis is on Germany's competitiveness: reduce electricity tax to EU minimum, introduce industrial electricity price and lower levies/grid fees; b) Climate: reaffirm EU's commitment to climate neutrality by 2045, cross-border European Energy Union and even to currently politically-volatile topics such as 90% emissions reduction target by 2040 and the expansion of EU ETS (ETS 2) to road transport and heating; c) Focus on CCS/CCU for 20GW of gas-fired power plants by 2030, but coal phase-out by 2038 reaffirmed; d) Supply chain: LkSG legislation to be replaced by new law for low-bureaucracy EU CSDDD implementation.	May, 2025 expected government formation; specific policy implementation timelines vary.	Agreement Reached	National Policy Agenda	Potentially lower power prices/grid fees. Broader agreement with EU climate objectives supports green energy initiatives. However, emphasis on business competitiveness could work against these stated objectives.	The plan supports continued renewables expansion (solar included) but aims for pragmatic, market-based financing. Nonetheless, the focus on synchronising grid and renewables expansion could delay projects.	Industry sees continuity/competitiveness focus but seeks clarity. Environmental groups criticize focus on gas/CCS/CCU.	https://www.koalitionsvertrag2025.de/sites/www.koalitionsvertrag2025.de/files/koav_2025.pdf
UK	Apr-2025	NESO Grid Connection Reform (TMO4+) Approval	UK energy regulator Ofgem approved grid operator NESO's TMO4+ plan to reform grid connections. Uses 2-gate system (Gate 1 indicative, Gate 2 firm offer) based on Readiness Criteria (land/planning) & Strategic Alignment Criteria (CP30 plan). Aims to clear queue, axe 'zombie' projects.	Approved 15 Apr, 2025. Licence standstill until Jun 10, 2025. Queue realignment process begins after. Gate 2 offers will arrive by the end of 2025. First projects, under current reform, will be connected to grid from 2026.	Approved	Regulatory Reform	Major reform to accelerate connection of strategically important generation/storage, crucial for meeting Clean Power by 2030 goals and enabling net zero transition. Actively shapes UK electricity generation mix.	Significant positive impact expected. Aims to unlock 65GW of utility-scale solar (up from 39GW). Accelerates BESS connections vital for solar integration. Raises bar for developers.	Positive from Ofgem, NESO, DESNZ, ENA, Solar Energy UK, developers. Acknowledges potential short-term uncertainty and market consolidation.	https://www.ofgem.gov.uk/decision/decision-connections-reform-package-tm04
European Union	Apr-2025	EU CEF Energy Cross-Border Funding	EU launched a €600 million funding call for key cross-border energy projects (PCIs and PMIs) covering electricity, hydrogen, and CO2 networks. CEF Energy has a total grant budget of €5.84 billion for the period 2021-2027.	Sep 16, 2025 application deadline. Results early 2026.	Launched	Funding	Supports development of integrated EU energy infrastructure crucial for accommodating higher renewable shares and new energy carriers (H2, CO2 for CCS).	Potential positive impact by funding grid reinforcements needed for large-scale solar integration, and hydrogen infrastructure linked to solar electrolysis.	Essential for cross-border European Energy Union, competitiveness, security, costs.	https://cinea.ec.europa.eu/news-events/news/cef-energy-launches-eu600-million-call-energy-infrastructure-projects-2025-04-02_en
France	Apr-2025	France's Code de l'énergie (Energy Code): Article L311; Law No. 2025-336 of April 14	The French National Assembly and Senate have adopted a law allowing existing coal plants (emitting >550g CO2/kWh) to convert to lower emissions to be treated as 'new installations', facilitating access to support mechanisms. Mandates conversion plans for state-owned operators by end 2026.	Effective upon future decree linked to Finance Law 2025.	Enacted	Legislation / Regulation	Facilitates coal phase-out (target 2027) by enabling conversion (e.g., to biomass/gas) rather than immediate closure, maintaining some dispatchable capacity on the grid.	Supports grid stability needed for intermittent renewables like solar, but potentially extends life of some fossil fuel infrastructure (if converted to gas).	Industry potentially supportive of legislation for asset reuse. Environmental groups potentially critical of conversion vs. full replacement.	https://www.legifrance.gouv.fr/codes/id/LEGIARTI000051467358/2222-02-22
European Union	Apr-2025	EU Directive 2025/794	The European Parliament and Council voted to delay sustainability reporting and due diligence obligations, which were about to be fully rolled out, for specific categories of in-scope companies. Corporate Sustainability Reporting Directive (CSRD) was postponed by two years and Corporate Sustainability Due Diligence Directive (CSDDD) by one year.	Immediate	Enacted	Legislation / Regulation (Amendment)	Adjusts timelines for corporate sustainability reporting and due diligence, affecting immediate actions taken by companies across sectors, including energy, in preventing carbon emissions and forced labour.	Separate EU Forced Labour Regulation tracks supply chain due diligence, especially relevant for Xinjiang-linked materials in solar, but this will only be effective in 2027, compounding the slow legal implementation. Voluntary initiatives like the Solar Stewardship Initiative (SSI) aims to provide independent certification for manufacturers not complicit in forced labour.	Multiple businesses/trade associations have raised concerns the delay could be used to reopen the legislation, following intense pressure on the bloc. Many companies have already invested significant resources towards implementation, leaving them vulnerable to their non-implementing competitors.	https://eur-lex.europa.eu/eli/dir/2025/794/oj/eng
European Union	Apr-2025	ESMA Common Supervisory Action (CSA) on ESG Disclosures under Benchmarks Regulation (BMR)	European Securities and Markets Authority (ESMA) aims to work with the European Commission to streamline rules for ESG benchmark administrators. The objective is to make comparisons across multiple ESG benchmarks easier.	Recommendations submitted to European Commission. Amendment timeline TBC.	Recommendations Published	Regulatory Guidance / Proposed Rule Change	Potential to lead to a reallocation of green investment across energy projects as what is considered "green" becomes better defined.	Potential to redirect capital of funds investing in solar/renewables via benchmarked indices as what is considered "green" becomes better defined.		https://www.esma.europa.eu/press-news/esma-news/esma-makes-recommendations-simplify-esg-disclosure-rules-benchmarks

Europe Policies

Geography	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
UK	Apr-2025	Voluntary Carbon and Nature Markets Integrity Principles - Consultation Launch	UK DESNZ launched 12-week consultation to improve the integrity of voluntary carbon and nature market credits. Outlines 6 principles (quality, transparency, supplementarity, claims accuracy, cooperation, transition alignment). Aims to build trust, unlock private finance, position UK as green finance hub.	Jul 10, 2025 consultaion closes. Policy implementation TBC post-consultation.	Launched	Government consultation	Aims to increase credibility and scale of VCMs, potentially influencing corporate climate strategies.	High-integrity VCMs could provide additional revenue streams for solar projects offering co-benefits like agrivoltaics, which often have higher costs or complexities than standard solar farms and might not be profitable without carbon finance.	VCMI & ICVCM reiterated support for high-integrity carbon and nature markets, welcoming consultation and requesting more clarity from the UK leadership.	https://www.gov.uk/government/consultations/voluntary-carbon-and-nature-markets-raising-integrity/voluntary-carbon-and-nature-markets-raising-integrity-consultation-document-accessible-webpage
UK	Apr-2025	Second Hydrogen Allocation Round (HAR2)	UK DESNZ shortlisted 27 hydrogen projects for potential government funding.	TBC funding decisions and project timelines.	Shortlisted	Funding	HAR2 and HAR1, which saw 11 projects being allocated over £2 billion in government funding, will together ensure UK green hydrogen viability amidst a spate of global project cancellations.	Demand for solar PV could increase due to support for green hydrogen production (using renewable electricity like solar).	Both Hydrogen Energy Association and Hydrogen UK stressed the need for HAR subsidies for their members to green light projects.	https://www.gov.uk/government/news/new-hydrogen-power-projects-to-boost-growth
Spain	Apr-2025	State Aid Scheme for Renewable Hydrogen Production	European Commission approved, under State Aid rules, a €400m Spanish scheme using the European Hydrogen Bank's "Auctions-as-a-Service." Supports up to 345MW electrolyser capacity / 221k tonnes H2 production. Aid via direct grant per kg of H2 for max 10 years. Competitive bidding process concluded Q1 2025.	Q1 2025 - Aid awarded via auction. Projects to be implemented over the next few years.	Approved	Funding	Supports REPowerEU, EU Hydrogen Strategy, RED III targets (RFNBOs). Helps Spain meet national 12GW electrolyser target by 2030. Accelerates industrial decarbonisation.	Strong positive impact by directly funding green hydrogen production, potentially creating significant demand for dedicated renewable electricity, including solar PV.	Subsidy welcomed by renewable industry to prevent cancellations of green hydrogen projects.	https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1059
UK	Apr-2025	HyNet CCS Project - Financial close	Eni announced financial close with UK DESNZ for the CO2 Transport & Storage (T&S) system of the HyNet industrial cluster, operated by Eni.	Project construction/operation phase proceeds.	Approved	Funding	Demonstrates UK financial and policy support for CCS as a key decarbonisation lever in the power and industrial sectors.	CCS is seen as a competitor to renewable technologies, and could displace these both in low-carbon power and hydrogen production.		https://www.eni.com/en-IT/media/press-release/2025/04/eni-and-uk-reach-financial-close-for-the-liverpool-bay-ccs-project.html
UK	Apr-2025	Great British Energy (GBE) Funding	UK brought forward a £300m initial funding via Great British Energy (GBE) to invest in domestic offshore wind supply chains (e.g., floating platforms, cables). Part of Industrial Strategy. Aims to mobilise private investment, de-risk projects.	End 2025 - Open for application for funding available over current Labour government's term.	Not Open	Funding	Reinforces commitment to offshore wind expansion as key part of industrial, energy security and renewables strategy.	No direct impact on solar, but strengthens overall renewables ecosystem and industrial base. May need to compete for investment/resources.	GBE, RenewableUK, Siemens Energy, trade association Offshore Wind Industry Council all welcomed the move.	https://www.gov.uk/government/news/prime-minister-launches-major-boost-for-uk-clean-energy-industry
European Union	Apr-2025	EU LIFE Programme 2025	Launch of 2025 calls under the LIFE Programme, totalling €600 million. Includes €91.4m for Clean Energy Transition sub-programme (via CSAs). Supports projects on nature, circular economy, climate mitigation/adaptation, energy transition.	Sep-Oct 2025 expected. Application deadlines vary by sub-programme.	Launched	Funding	Provides significant EU funding for projects supporting climate action and environmental protection, including accelerating the clean energy transition.	Dedicated funding of €91.4m available for projects supporting clean energy transition, potentially including solar-related initiatives (e.g., policy implementation support, market uptake).		https://cinea.ec.europa.eu/news-events/news/life-calls-proposals-2025-claim-your-share-eu600-million-and-help-create-sustainable-future-europe-2025-04-24_en
Austria	Apr-2025	Austrian Ministry of Economic Affairs and Energy's EAG Investment Grants Ordinance, Electricity - 'Made in Europe' Bonus	Austria's 2025 EAG funding for solar and associated storage has been cut to €60 million, part of a €70 million (2024: €150 million) total budget for all RES investment grants covered by the ordinance. Notably, the ordinance grants an additional layer of up to 20% (depending on the amount of components used) funding for projects that utilize solar (modules, inverters) and associated energy storage components that are manufactured in Europe and ETICS certified. RES projects do not need to use a minimum percentage of these in order to qualify.	June 3 – July 7, 2025 funding round	Announced	Funding	Aims to tackle "unfair global competition". Complements existing policy focus on solar PV, storage, hydro. Shift towards targeted funding for specific supply chain elements. However, overall budget cuts could hit RES deployment.	Incentivizes use of European components in Austrian solar/storage projects, providing additional demand for solar PV manufacturers. Supports deployment of European tech. However, overall budget cuts could hit solar deployment.		https://www.eag-abwicklungsstelle.at/
Austria	Mar-2025	VAT, Energy Economy Act	The Austrian photovoltaic association, PV Austria, has called on the country's recently elected government to preserve VAT exemptions for smaller systems under 35 kW, which had been temporarily removed in early March. Additionally, the association emphasized the urgent need to pass the pending Energy Economy Act, which is designed to streamline grid access, energy storage, and infrastructure development.	TBD	Ongoing	Lobbying	The uncertainty surrounding Austria's VAT exemptions and the stalled Energy Economy Act could disrupt national energy policy implementation.	Potential VAT increases are making small-scale installations less financially attractive for consumers and businesses. Without the grid access improvements promised in the Energy Economy Act, solar projects could face increasing connection bottlenecks, longer approval timelines, and higher development costs, ultimately slowing Austria's solar capacity expansion.		https://pvaustria.at/

Europe Policies

Geography	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
European Union	Feb-2025	Clean Industrial Deal	The EU Commission has tabled a fresh list of non-legally binding proposals in response to shifts in global geopolitics, and as a follow up to the European Green Deal, aimed at boosting EU industrial and clean-tech competitiveness while simultaneously reaffirming its commitment to carbon emissions reduction. The policy intends to finance industrial decarbonisation, secure demand for EU-made clean tech products, boost raw materials circularity and slash energy costs for EU businesses to ensure a level playing field with competing economies. Progress will be monitored in the Annual Single Market Competitiveness Report.	Q1 2025 - Q4 2026	Launched February 26, 2025	Industrial incentives	1) Proposal to establish €100bn Industrial Decarbonisation Bank (Q2 2026) 2) The Action Plan on Affordable Energy (COM/2025/79) proposal aims to slash energy costs by €260bn a year by 2040 through these measures: a) Recommend lower electricity taxes for decarbonising, energy-intensive industries (Q4 2025); recommend unified design for network charges (Q2 2025). b) Reduce reliance on imported fossil fuels, instead encouraging electrification via single market. c) Guarantee corporate Power Purchase Agreements (PPAs) via €500 million EIB pilot programme to help businesses secure predictable energy prices (Q2 2025). d) Propose legislation on easing existing Gas Storage Regulation targets to reduce gas price hike risk (Q1 2025). e) Propose €1.5bn EIB grids manufacturing package to strengthen EU-made grid supply chain components.	1) Support Industrial Decarbonisation Accelerator Act (Q4 2025): a) Establish a low-carbon label for industrial products b) Apply minimum EU content requirement in public and private procurement 2) Revise Public Procurement Directives (Q4 2026): a) To bring in non-price criteria to create demand for EU-made clean-tech products 3) Support European Grids Package (Q1 2026): A proposal to modernise EU's energy grid to integrate renewables, including solar power.	The roadmap lacks practical actions, the impact on industries is still to be seen. Clear decarbonisation commitments from beneficiary companies are missing. According to SolarPower Europe, the preference for EU-made products in public procurement should strengthen the Net-Zero Industry Act, but it urgently needs to complement that with financing support for the building and operating of factories.	https://commission.europa.eu/topics/eu-competitiveness/clean-industrial-deal_en
Switzerland	Feb-2025	Federal Act on a Secure Electricity Supply from Renewable Energy Sources (ESO)	The new regulations introduce updated tariffs, encourage battery storage, and allow local electricity trading.	Jan-2026	Approved	Regulation	The new regulations encourage self-consumption and the storage of solar production peaks to ease pressure on the electricity grid.	The new rules set new remuneration tariffs based on a realistic share of self-consumption; PV system operators encouraged to expand self-consumption through storage batteries or electromobility	The Swissolar trade union believes incentives for local consumption remain too low	
Germany	Feb-2025	Solarspitzen (Solar Peak) scheme	Scheme suspends the feed-in remuneration for new PV systems when electricity prices are negative	Mar-25, after publication in Federal Law Gazette	Approved	Subsidy	PV system owners that install a smart meter will benefit from a compensation scheme under the new rules. This should accelerate the roll out of smart metering systems	Operators of existing pv systems are asked to switch to the new regulation on a voluntary basis. As an incentive to switch, they will receive an increase in the feed-in tariff of €0.006 ($0.003)/kWh.	German PV association BSW said the new measures will not not significantly affect the profitability of new photovoltaic systems.	
France	Feb-2025	France Federal Budget Law	France new 2025 Budget Law to reduce VAT to 5.5% (from 10%) for PV systems up to 9kW	Oct-2025 at earliest	Approved, but implementation needs to be confirmed by another ministrial decree, due by October 2025	Tax reduction		Previously, France allowed projects under 3 kW to claim a preferential VAT rate of 10%; current revision will stimulate new installations. Homeowners might delay new installations till Q3, 2025.	This decree will ensure installations maximize self-consumption, meet energy efficiency goals, and adhere to environmental performance standards, according to Groupement Des Particuliers Producteurs D'electricite Photovoltaique (GPPEP), a French association of small power producers	https://www.aft.gouv.fr/en/state-budget#PLF
Czech Republic	Jan-2025	Law on agrivoltaics - Decree No. 425/2024 Coll.	The law defines two categories of permissible agrivoltaic systems: (1) horizontal systems must be at least 2.1 meters high to allow farming activities underneath and keep a minimum 95% of the total project area agriculturally significant. (2) vertical systems to feature rows of photovoltaic modules spaced at least six meters apart.	Immediate	Approved and published	Legislation / Regulation	The new law facilitates installation of agri PV and is expected to drive the market	The integration/collaboration between energy producers and farmers sets a new standard for the whole industry and will drive the market		https://ceenergynews.com/renewables/czechias-new-legislation-agrivoltaics/
Norway	Dec-2024	New regulatory framework for energy communities	Energy communities will be allowed PV systems up to 5 MW in size to sell power and share surplus energy within specific industrial areas	Jul-2025	Under public consultation	Regulation	The new rules are expected to boost Norway's renewable energy share without straining the power network	The new provisions will be particularly relevant for PV systems deployed in industrial areas		
The Netherlands	Nov-2024	Phase out the country's net metering scheme from 2027 onwards	The netting scheme (salderingsregeling) for solar panels, where the energy supplier pays small volume solar users compensation for the difference between electricity fed back into the grid and consumed, will end start 2027.	Jan-2025	Approved by Parliament	Incentive system	Current payback time for a residential PV system is seven to nine years. Without net metering, this could extend to 12 to 17 years	Phasing-out of the scheme will increase the payback time to deploy PV systems, thus making them unviable for low-income households	Trade group Holland Solar welcomed the move, saying it will bring clarity and enable PV companies to plan future strategies. Dutch association of electricity and gas network operators, and Energy Storage NL suggested the phasing-out of the net-metering regime, in combination with a rebate program for storage systems.	https://business.gov.nl/amendment/netting-scheme-solar-panels-ends/

Europe Policies

Geography	Date of Update	Policy / Legislation	Policy / Legislation Detail	Expected Implementation Date	Status	Type of Policy	Impact on energy policy	Impact on solar markets	Reaction	Links/ Notes
Germany	Oct-2024	Amendments to Renewable Energy Sources Act (EEG Industry Act) - Oct 2024	Electricity market reform; Proposal to reduce subsidies for solar power.	End 2025, but depending on the German elections	Ongoing negotiation between political parties	Incentive system	Revision of the EEG Industry Energy Act could open the door to other energy related changes, especially with new government and new political focus on climate and energy related domains. Proposed reforms for the electricity market focus on: - the investment framework for renewable energy sources, - the investment framework for controllable capacities,capacity safeguarding mechanism through peak price hedging - locational signals, including temporally / regionally differentiated grid fees and demand response in congestion management - the flexibilisation of demand, enable price response through dynamic tariffs, adapt grid fee stystem to promote flexibility	Small systems users will only be rewarded if their electricity is worth something. In times of negative pricing, they will no longer receive subsidy. Previously, systems up to 100 kilowatts have benefitted from guaranteed feed-in tariffs. The limit is now revised down to 90 KW for systems installed in 2026. For systems built in 2027 the limit is 75 KW and from 2028 the limit is 25 KW. New systems with more kilowatts would have to sell their electricity at current market prices. New systems under 25 KW would only receive a guaranteed feed-in tariff if the market price for electricity is positive.	The German solar trade association (BSW) has criticised government proposals to amend its EEG Energy Industry Act, which it said could hamper the deployment of commercial rooftop solar installations.	https://www.bmwk.de/Redaktion/EN/Publikationen/Energie/20240801-electricity-market-design-of-the-future.pdf?__blob=publicationFile&v=4
Spain	Sep-2024	National Integrated Energy and Climate Plan (PNIEC) Update	By 2030, Spain expects to have installed 76 GW of photovoltaics (of which 19 GW from self-consumption) in updated 2023-2030 PNIEC	Immediate	Approved by Spanish Government	Energy Target	Total investment of €308 billion forecast by 2030. Increase in energy independence - the PNIEC 2023 targets boosting domestic energy production to 50% of the total supply (vs 27% in 2019). This shift is expected to generate savings of €86.75 billion in fossil fuel imports throughout the plan's duration. Renewable energy to account for 48% of final energy consumption—rising to 81% for electricity.	By 2030, Spain expects to have installed 62 GW of wind energy (including 3 GW from offshore wind), 76 GW of photovoltaics (19 GW of which will come from self-consumption), 1.4 GW of biomass, and 22.5 GW of energy storage, also factoring in contributions from solar thermal power. The new plan will increase the electrification of the economy, setting a target of 35%, up from the 32% outlined in the original plan.	Spanish solar trade associations welcomed the updated targets and ambitions.	https://clusterenergia.cat/news/the-spanish-government-approves-the-2023-2030-pniec-to-increase-energy-independence-and-boost-renewables/
Italy	May-2024	Federal Decree Article 5 on urgent provisions for agricultural, fishing and aquaculture enterprises, and for strategic national interest enterprises	Introduction of a ban on the installation of new photovoltaic systems with modules placed on the ground and on increasing the extension of existing ones, in areas classified as agricultural by urban planning	Immediate	Approved by Italy's Council of Ministers in May 2024	Legislation / Regulation	Measures to strengthening agricultural interest enterprises, to support agricultural work and combat unfair practices	Ban on new ground-mounted PV installations and extensions of existing ones on agriculatural land. Exception for the implementation of Italy's PNRR (National Recovery and Resilience Plan), those relating to agrovoltaic projects and those to be built in quarries, mines, areas under concession to Ferrovie dello Stato and airport concessionaires, buffer zones of the motorway strip, areas within industrial plants	Italy's solar association suggests this decision could hinder Italy from reaching its 2030 decarbonisation targets, stating the law is "contradictory to the objective of tripling renewable energy by 2030 recently signed by Italy	https://www.governo.it/it/articolo/comunicato-stampa-del-consiglio-dei-ministri-n-80/25642
France	Apr-2024	Federal Decree 2024-318	Legislation on new conditions to install solar panels on agricultural, natural or forest land	Immediate	Approved and published in Official Journal April 8	Legislation / Regulation	Limitation on expansion Agrivoltaic PV - PV installations are not allowed to cover more than 40% of an agricultural plot surface	Agrivoltaic installations, except for livestock farming, must ensure that agricultural production achieves at least a 90% yield per hectare compared to a designated control zone. Area for agrivoltaic installation does not exceed 10% of the total area covered. Installations <10 MW peak are not subject to fixed coverage rate, projects >10 MW the coverage rate must not exceed 40%.		https://www.legifrance.gouv.fr/jorf/id/JORFTEXT000049386027#:~:text=des%20installations%20...-,D%C3%A9cret%20n%C2%B0%202024%2D318%20du%208%20avril%202024%20relatif,terrains%20agricoles%2C%20naturels%20ou%20forestiers