SolarCitizens

RAISE the ROOF

ROOFTOP SOLAR PLEDGE

COP30 YELLOW BOOK

November 2025

Join the Rooftop Solar Alliance

Solar Citizens is inviting civil-society and NGO partners across the Asia-Pacific to join the Rooftop Solar Alliance. Get in touch to learn more.

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Executive Summary

Solar Citizens' Raise the Roof campaign calls on the Australian Government and nations across the Asia-Pacific region to make a 'Rooftop Solar Pledge' at COP31, aligned to their Nationally Determined Contributions (NDCs), and to fulfil the pledge made at COP28 in Dubai to double renewables and triple energy efficiency.

A Rooftop Solar Pledge for Australia

Australia leads the world in rooftop solar, with more than four million homes generating their own power—a national achievement built on decades of innovation and community leadership. Yet millions of Australians are still locked out of solar savings, including renters, apartment dwellers, and low-income households. Solar Citizens is calling on the Federal Government to double Australia's rooftop solar capacity to 54 GW by 2035, backed by storage. To achieve this, the pledge focuses on three key priorities:

1. **Unlocking Solar for Renters** – Expanding incentives and financing options so renters and landlords can share in solar savings.
2. **Unlocking Solar for Big Roofs** – Empowering commercial and industrial buildings to host large rooftop systems that share clean power with surrounding communities.
3. **Activating Urban Renewable Energy Zones (UREZs)** – Creating local clean-energy hubs where households and businesses can generate, store, and share renewable electricity.

This roadmap will cement Australia's leadership in people-powered energy, delivering lower bills, stronger grid resilience, and emissions reduction opportunities by 2035.

Global Rooftop Solar Pledge

Rooftop solar and battery storage are already the lowest-cost forms of new energy generation across the Asia-Pacific (APAC) region, yet access remains uneven and many nations lack the policies, funding commitments and partnerships needed to scale household renewables equitably. The Raise the Roof campaign calls for nations across the APAC region to follow Australia's lead and commit to a Rooftop Solar Pledge by COP31, that is ambitious, achievable and measurable. Solar Citizens recommends that Asia-Pacific governments embed rooftop solar and battery targets in their Nationally Determined Contributions, along with a comprehensive action plan that includes policy mechanisms to support all households and communities.

Rooftop Solar Alliance

Solar Citizens invites other civil society groups to join a Rooftop Solar Alliance—a collaborative network supporting nations to adopt their own Rooftop Solar Pledges. Together, Alliance members will share expertise, coordinate advocacy, and build political momentum to integrate rooftop solar and storage into national climate commitments at COP31.

Heidi Lee Douglas

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CEO

Genevieve Kelly

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CHAIR

Acknowledgement of Country

Solar Citizens acknowledges the Traditional Custodians of the lands on which we live, work and campaign for a cleaner future. We pay our deepest respects to all Aboriginal and Torres Strait Islander Peoples and to Elders past and present, and recognise that their sovereignty was never ceded.

Solar Citizens acknowledges the long-standing and continuing leadership of First Nations peoples in caring for and protecting Country and fighting for a safe climate for current and future generations.

About Solar Citizens

Solar Citizens is an independent, community-based charity and not for profit organisation working to accelerate Australia's transition to a clean, fair, and renewable-powered future, to create a brighter future and protect our environment. Since our founding in 2013, we've grown into a national movement of everyday Australians with more than 200,000 active supporters who are united by the belief that clean energy should benefit everyone, not just those who can afford it.

Our mission is to ensure that households, communities, and small businesses are at the heart of Australia's energy transition. We campaign for policies that make solar, battery storage, and electrification accessible to all, and that drive down energy bills while cutting emissions. Solar Citizens gives everyday people a voice in shaping our nation's energy future.

We are proudly independent and non-partisan, funded by donations from thousands of Australians who care about a cleaner, more affordable energy system. We've helped make Australia a world leader in rooftop solar—powering one in three homes—and we're now expanding our impact globally through the Raise the Roof campaign.

Mock wedding of our mascots Mr Battery and Ms Solar Power - 1 July 2025

Introduction

Australia's rooftop solar journey is a global success story. It began in a Sydney university lab in 1983, and is one of the world's most powerful examples of people-powered climate action. Today, more than one in three Australian homes generate their own electricity, with household solar and batteries driving record cuts in emissions and energy costs. But this transformation cannot stop at our shores. Through 'Raise the Roof' Solar Citizens is calling to scale rooftop solar success across the Asia-Pacific.

Sydney apartment renter Sharpa advocates for access to rooftop solar at Solar Citizens' Sun Day event, September 2025

Within Australia, we are asking our own Federal Government to double national rooftop solar capacity backed by storage by 2035–and in doing so, inspire neighbouring countries to do the same. This is not just about panels on roofs; it's about energy equity, regional collaboration, and the empowerment of everyday people to create a movement that leads the clean energy transition over the next decade and beyond.

Raising the Roof on Australia's Ambition

The Rooftop Solar Pledge: Raising the Roof on Australia's Ambition

Australia leads the world in rooftop solar, with over four million systems already installed and a rapidly increasing number of home batteries. But more than half of the population are still missing out on clean energy savings—including renters and apartment residents who face barriers to installing solar and other consumer energy resources (CER).

Climate Change and Energy Minister Chris Bowen celebrates the announcement of the Cheaper Home Batteries Program with Solar Citizens mascots 'Ms Solar Power' and 'Mr Battery', April 2025

Solar Citizens is calling for the Australian Federal Government to step up their ambition on household renewable energy leading into COP31. Specifically, we are advocating for a commitment or pledge from Prime Minister Anthony Albanese to double rooftop solar capacity by 2035, backed by battery storage.

Solar Citizens are asking for the following policies to achieve this target:

1. **Unlocking Solar for Renters**
2. **Unlocking Solar for Big Roofs (commercial and industrial)**
3. **Activating Urban Renewable Energy Zones**

Sydney apartment resident Carolin Wenzel (and Ruby) with Solar Citizens CEO Heidi Lee Douglas and National Advocacy Lead Charlie Rodrick, February 2024

Double Rooftop Solar backed by storage in Australia by 2035

Australia's estimated rooftop solar potential is enormous, with just 21% so far realised. Of the 27 Gigawatts (GW) installed rooftop solar capacity so far, about 22 GW is on residential houses, with the commercial and industrial (C&I) sector accounting for the other 5 GW.

That leaves a further ~100 GW of untapped rooftop solar potential, (39 GW residential; 23 GW C&I; and the remainder on other building types). Plus, with millions of new homes and new commercial developments planned in the next five-to-ten years, Australia's rooftop solar potential will only continue to grow.

Solar Citizens is calling for an ambitious commitment from our Federal Government to maintain its global leadership on rooftop solar by pledging to double rooftop solar capacity from 27 GW to 54 GW by 2035. This will avoid an estimated 35 Megatonnes (Mt) CO_2 emissions annually.

To achieve these targets, we propose the following roadmap, complete with interim 2030 targets:

By 2030:

- Additional 20 GW rooftop solar capacity, totalling 47 GW, unlocked through:
  - 4 GW on rental houses (unlocking 1 million or 30% of rental homes)
  - 4.4 GW across all new builds and 30% of existing apartments (owned/ rented)
  - 6.2 GW within the C&I sector (totalling 40% of C&I rooftops)
  - 5.4 GW on freestanding owner-occupied homes (conservative estimate)

By 2035:

- Additional 7 GW rooftop solar capacity, totalling 54 GW, unlocked through:
  - 2 GW solar capacity on rental homes (totalling 50% of all rentals and apartments)
  - 2.8 GW C&I (unlocking a total 50% of C&I capacity)
  - 2.2 GW of solar capacity on owner-occupied households (conservative estimate)

Battery Empowered Homes

Behind-the-meter battery storage has a significant role to play in a CER-driven energy grid, especially when coordinated as part of a virtual power plant (VPP)–in an electricity grid with high levels of rooftop solar. Home batteries soak up excess energy during the day, allowing solar owners to use their cheap, clean energy during the evenings when the sun is no longer shining. This helps to reduce peak demand as less people are drawing energy from the grid during peak demand periods. Importantly, it also lowers power prices for all consumers. Rooftop solar energy stored in a battery and exported to the grid is cheaper than coal-fired electricity.

On 1 July 2025, the Federal Government started the next chapter of Australia's consumer energy trajectory, with the launch of the hugely popular Cheaper Home Batteries Program. In the first four months of the program 800 batteries per day have been installed, reaching a total of 100,000 by the end of October. In 2025 the Australian Government also committed to enabling one million household batteries nationally by 2030.

Rooftop solar, battery and EV owners Philippa and Mike England at their home in Brisbane, August 2024

To support the doubling of rooftop solar, Solar Citizens is calling for a scaling up of ambition to achieve 1.8 million behind-the-meter batteries by 2035. We're calling for stronger policies and consumer protections to ensure the high levels of VPP uptake required for smarter coordination of CER. And we're calling for government incentives and policies to accelerate the uptake of vehicle-to-grid technology, to unlock EVs as smart, coordinated batteries-on-wheels.

Going Global: Recommendations for Asia-Pacific

The Rooftop Solar Pledge: Building an Asia-Pacific Alliance

Global renewable energy capacity is expected to more than double by 2030, with solar PV predicted to account for more than 80% of the additional generation capacity. Rooftop solar and battery storage remains the lowest-cost option for new energy generation in most countries.

As part of the wider APAC region, Australia is uniquely placed to share its lessons and support neighbouring countries on their own path to a renewable future. APAC is home to around 60% of the world's population, and many nations across the region are blessed with the same abundant sunshine and renewable potential that has powered Australia's rooftop revolution.

What happens here matters globally: progress in the Asia-Pacific will determine not just regional prosperity, but the speed and scale of the global energy transition. By translating Australia's experience into regional action, we can help ensure that our neighbours–from Indonesia to the Pacific Islands–are also leaders in clean, affordable, and secure energy systems.

While China leads the way in rooftop solar uptake globally, other APAC nations are also making impressive strides.

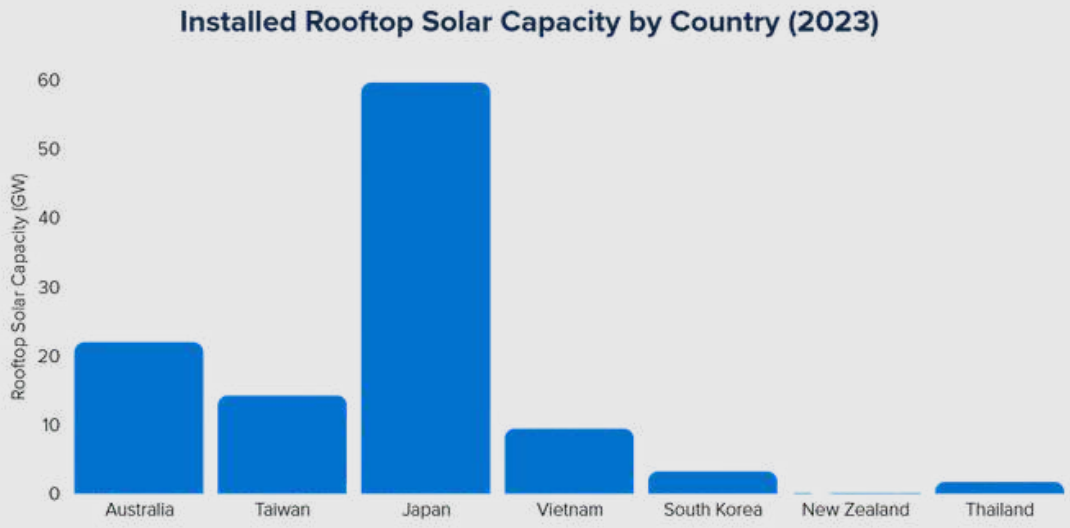
- By the end of 2023, Japan had successfully grown its rooftop solar capacity to 59.6 GW through a phased feed-in tariff approach that gradually reduces rates while keeping demand high.
- Taiwan is also progressing steadily, reaching around 14.3 GW of solar capacity by 2024 and a national target of 20 GW by 2025.
- Vietnam had a total rooftop solar capacity of 9.5 GW in 2023 and plans to add 2.6 GW more by 2030.

These countries demonstrate how well-designed policies and sustained support can drive rapid solar adoption.

Other countries in the region are still in the early stages of rooftop solar uptake.

- Indonesia had installed just 140 MW rooftop solar capacity by December 2023, far below its 3.6 GW target for 2025.
- Thailand has achieved roughly 1.8 GW rooftop solar capacity by 2022
- South Korea's distributed rooftop solar capacity was estimated at 3.3 GW in 2022.

These figures illustrate the uneven pace of adoption across APAC and the potential for accelerated growth if lessons from the region's leaders are applied.



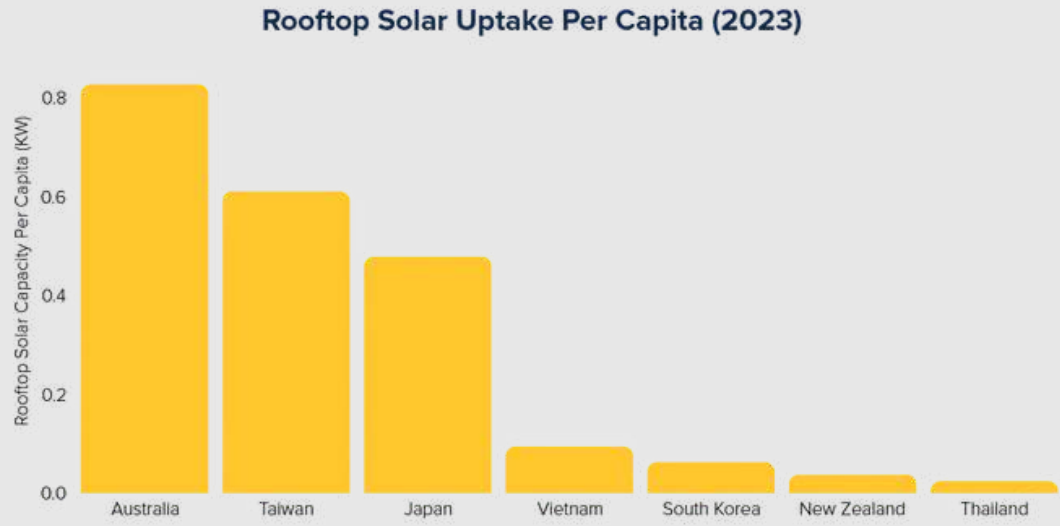


Figure 2: A comparison of installed rooftop solar capacity (GW) by country in 2023
Figure 3: Installed rooftop solar capacity relative to the population size of each country (kilowatts/ kW per person)

Local resident Mayumi advocates for rooftop solar access at Sun Day event, September 2025

Driving Rooftop Solar Ambition across the Asia-Pacific

The overarching mission of Solar Citizens' 'Raise the Roof' initiative is to create a world where every household in the Asia-Pacific Region can access affordable, renewable energy through rooftop solar and battery storage—cutting emissions, reducing energy poverty, and empowering communities to take charge of their energy future.

Building on Australia's world-leading rooftop solar success, we aim to translate proven, people-powered models into regional impact. The Rooftop Solar Pledge contributes to a just and equitable response to climate change by ensuring the clean energy transition is community-led, reduces cost-of-living pressures, and shares the benefits of renewable energy with everyone—not just those who own a roof.

At its core, the pledge encourages countries to adopt national rooftop solar and storage commitments as part of their NDCs. While the specifics will differ for each country, all pledges should be ambitious and backed by policies and incentives that address energy equity and drive uptake. The initiative also calls for the integration of CER into climate finance and just-transition mechanisms, recognising citizens not only as consumers, but as active participants and everyday heroes shaping the renewable energy future.

The following principles provide a roadmap for governments seeking to make rooftop solar backed by storage a central part of their clean energy transition.

The Rooftop Solar Pledge must be:

- Ambitious: Set an ambitious goal for both rooftop solar and household battery storage uptake by 2030 and 2035
- Achievable: accompanied with a comprehensive action plan that includes specific policy mechanisms to help make the pledge a reality by 2035
- Measurable: ensure that rooftop solar uptake can be measured
- People-focused: help low income households, renters apartment residents, young people, indigenous people, and others facing disadvantage
- Climate-safe: align with NDCs and contributes significantly to achieving substantial emissions reduction as quickly as possible

Join the Asia-Pacific Rooftop Solar Alliance

Solar Citizens is building an alliance to support nations across the Asia-Pacific to adopt their own Rooftop Solar Pledge. The Rooftop Solar Alliance will help coordinate not-for-profit organisations already active in the region, empowering them to work directly with governments, unions and industry partners to implement and follow through on national rooftop solar pledges.

The Rooftop Solar Alliance will provide a platform for partners to share resources, research, and expertise, while coordinating action to build political momentum for scaling rooftop solar across APAC ahead of COP31.

Local family at Sun Day event with Solar Citizens CEO Heidi Lee Douglas, September 2025

Solar Citizens will support alliance members and co-lead initiatives, including the development of a Regional Rooftop Solar Pledge Campaign Plan. Co-authored by the Rooftop Solar Alliance partners, the plan will make the case for ambitious commitments, effective government policies, and both public and private investment—all aimed at driving emissions reductions, energy equity, and cost-of-living relief in the region. The Campaign Plan will serve as a powerful advocacy tool, helping to secure political support and ensure governments deliver on their rooftop solar commitments.

In parallel, Solar Citizens will co-produce the COP31 Yellow Book with the Rooftop Solar Alliance. It will build the case for regional Rooftop Solar Pledges, and help partners identify local opportunities, shape effective policies, and mobilise public support for national rooftop solar pledges. Together, these initiatives will provide a practical, coordinated blueprint for scaling rooftop solar and battery storage across APAC, supporting a faster, fairer, and more equitable clean energy transition.

Join the Rooftop Solar Alliance

We're inviting you to join the Rooftop Solar Alliance to help us drive the clean energy transition across the Asia-Pacific. This invitation is open to not-for-profit and non-governmental organisations (NGOs).

By joining the Rooftop Solar Alliance, you'll share knowledge, build international connections, access helpful resources and learn from the successes and challenges experienced in other nations including in Australia;

The Rooftop Solar Alliance aims to help you secure a Rooftop Solar pledge for your nation–one that is ambitious but achievable, and if delivered on, is guaranteed to improve energy equity outcomes for people and emissions reduction for the planet.

To learn more and express your interest in joining the Rooftop Solar Alliance in the lead up to COP31, please get in touch with our CEO, Heidi Lee-Douglas: **heidi@solarcitizens.org.au**

Solar Citizens staff, board members and volunteers, September 2025

Your action today can transform your country's energy future.

Case Study: How Pakistan's Rooftop Solar Journey Became People-Led

Unlike Australia's carefully designed rebate and feed-in-tariff schemes, Pakistan's rooftop boom began without major government subsidies.

- There was no national rooftop solar target and no consistent incentive program.
- People installed solar because of blackouts and unaffordable grid power, not because of a policy push.
- The state only formalised net-metering after uptake was already spreading informally.

This makes the movement bottom-up: the people moved first; the government followed later.

From 2022 onward, Pakistanis faced severe electricity price hikes (over 60% in two years) and daily load-shedding that left homes without power for hours.
In response, households began pooling savings, forming local cooperatives, and buying solar panels directly from Chinese importers or neighbourhood installers.

- The rise of small installation companies — often family-run — became the backbone of deployment.
- Informal word-of-mouth networks replaced government marketing.
- Mosques, schools, and local businesses became early adopters, inspiring copycat installations in nearby homes.

Solar spread as a community practice, not a state program.

- Solar module imports skyrocketed from 3.5 GW in 2022 to 16.6 GW in 2024, mostly purchased by local distributors and small installers.
- Over 90% of rooftop systems were privately financed — with people sourcing panels, inverters, and batteries themselves.
- Many installers are trained informally; some even learned through YouTube tutorials and peer networks.

Local resident cleaning a Solar Panel, Lahore, Pakistan, December 2022 source: pexels.com

This decentralised market means innovation and deployment are happening without central control — a classic people-powered transformation.

When Pakistan introduced net-metering regulations in 2015, it created a pathway for citizens to become energy producers. By 2025, more than 4 GW of rooftop solar capacity was registered under net-metering — with thousands more unregistered systems operating independently.

Citizens — not utilities — are now selling power back to the grid, changing their relationship with energy entirely. This shift from "consumer" to "prosumer" is a key marker of a people-led energy transition.

Without large-scale subsidy programs, households got creative:

- Many installed panels in stages — starting small and expanding as they could afford it.
- Informal credit networks and community lending groups financed installations.
- Overseas remittances from the Pakistani diaspora became a hidden driver — families abroad sending money home for solar systems to stabilise power supply for relatives.

That's what makes it people-led: the capital, the initiative, and the motivation all came from citizens themselves.

Pakistani journalists, YouTubers, and tech influencers played a major role in normalising rooftop solar. They shared installation tutorials, cost breakdowns, and success stories — making the idea accessible to middle-class families.

In a country where trust in government is low, this peer-to-peer communication helped solar spread faster than official channels ever could. In Pakistan, it's framed as independence, survival, and dignity — freedom from unreliable grids, corrupt billing systems, and rising costs.

That emotional driver — taking power into your own hands — has made rooftop solar a social movement as much as a technological one.

Small-scale solar enterprises and community energy initiatives have opened opportunities for women entrepreneurs and young technicians. Training programs in Punjab and Sindh have equipped hundreds of youths with solar installation skills — turning an energy crisis into livelihoods.

Pakistan's rooftop solar journey is people-led because:

- **It began with citizens acting, not waiting for government.**
- **It's financed by households, not subsidies.**
- **It's coordinated by communities, not utilities.**
- **It's communicated through social networks, not official campaigns.**
- **And it's powered by a collective will to gain independence from a failing energy system.**

Aligning the Rooftop Solar Pledge with the Belém Action Mechanism

At COP30 in Belém, civil society is calling for the creation of the Belém Action Mechanism (BAM)—a new framework under the UNFCCC designed to accelerate Just Transition by connecting global ambition with community-led action. The BAM aims to coordinate support, share knowledge, and mobilise finance for countries and communities advancing fair and inclusive transitions to renewable energy.

The Rooftop Solar & Storage Pledge directly aligns with this vision. It offers a concrete, people-powered example of how the principles of BAM can be put into practice—demonstrating how fairness, affordability, and participation can drive climate ambition.

Through the Asia-Pacific Rooftop Solar Pledge Initiative, Solar Citizens and partners are already building the kind of network that BAM is designed to enable: a regional alliance of civil society groups, councils, and community organisations supporting governments to adopt national rooftop solar pledges and deliver practical just-transition outcomes from the ground up.

Like BAM, Raise the Roof centres justice, inclusion, and participation. It focuses on the people who are too often locked out of clean-energy opportunities—renters, apartment residents, and social housing tenants—and creates new pathways for them to share in the benefits of the transition. By doubling rooftop solar backed by storage by 2035, countries can reduce emissions, cut energy bills, and ensure that no one is left behind as we move to clean power.

Both initiatives share the same core purpose: to make the energy transition financeable, participatory, and fair. The Rooftop Solar Pledge provides a measurable and achievable commitment—a national goal embedded within NDCs—while BAM offers the global coordination and support needed to scale such efforts internationally.

Together, BAM and Raise the Roof form two halves of the same equation: one setting the global architecture, the other demonstrating community-level delivery. By linking these efforts, Solar Citizens and the Rooftop Solar Alliance can help ensure that BAM launches with real-world proof of what a just, distributed, and people-powered transition looks like in practice.

In Belém, we have the opportunity to show that justice and ambition can rise together—and that the world's clean-energy future can be built not only by governments, but by communities, households, and everyday people generating power from their own rooftops.

Australia's Rooftop Solar Success Story

Few nations have transformed sunshine into energy quite like Australia. What began as a laboratory breakthrough in Sydney in 1983 has evolved into a global clean energy success story—one that now powers one in three Australian homes.

This transformation is the result of world-class innovation, smart policy, and community action. Decades of targeted incentives, falling technology costs, and passionate advocacy have turned solar power from a niche passion for early adopters into a mainstream, household investment. Along the way, it has slashed energy bills, cut millions of tonnes of carbon emissions, and empowered Australians to take control of their energy future.

As Australia enters its next clean energy chapter—marked by a huge uptick in home batteries, electric vehicles, and virtual power plant connectivity—the rooftop solar revolution stands as proof of what's possible when innovation and government incentives meet. Our challenge now is to build on that success: to ensure every household, renter, and community can share in the benefits of clean, affordable solar power backed by storage.

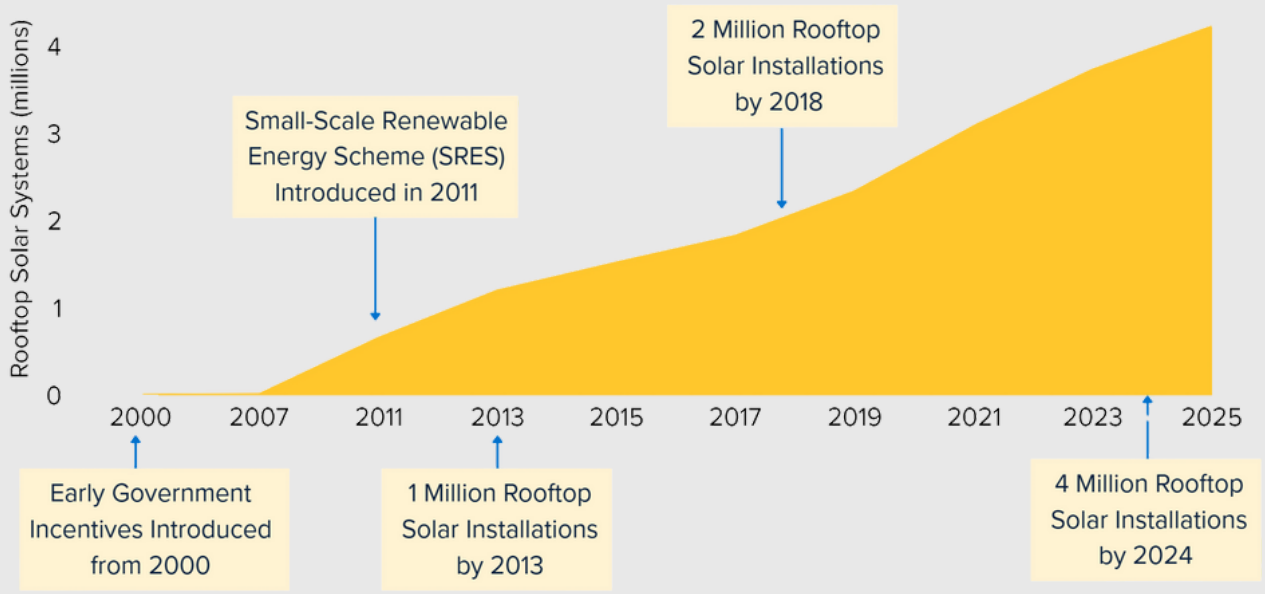


Figure 3: Number of rooftop solar installations over time, with milestones and key contributing factors such as government incentive programs.

Australia's Solar Success Story Over Time

1980s – The University of New South Wales (UNSW) Breakthrough
Australia's solar journey began with world-leading innovation. In 1983, Professor Martin Green and his team at UNSW developed the most efficient silicon solar cell in the world. Their pioneering research laid the foundation for affordable, efficient solar panels and the global solar industry.

2000–2007 – The Spark (~10,000 installations by 2007)
In 2000, the Federal Government's Photovoltaic Rebate Program was introduced, encouraging early adopters to install rooftop solar. This incentive program was backed in by the Renewable Energy Target (RET) introduced in 2001. Systems were still expensive, but with strong government policy, incentives and increasing solar PV imports available from the growing Chinese solar market, a fledgling domestic rooftop solar market was born.

Photovoltaic Rebate Program (2000 - 2007)
The Photovoltaic Rebate Program (PVRP) was Australia's first major federal policy to kickstart the domestic rooftop solar market. Introduced in 2000 under the Howard Government, it offered cash rebates to households and community organisations that installed small-scale solar photovoltaic (PV) systems—helping to offset the high upfront cost of early solar technology.

At the time, solar panels were still expensive and largely unfamiliar to most Australians. By providing direct financial assistance of up to several thousand dollars per system, the PVRP played a crucial role in seeding early demand and building public confidence in rooftop solar.

Renewable Energy Target (2001 - 2011)
The Renewable Energy Target (RET) was a national policy introduced in 2001 under Prime Minister John Howard to increase the share of Australia's electricity generated from renewable sources. It worked by requiring electricity retailers to source a certain percentage of their power from renewable energy–creating a guaranteed market for clean energy generation.

Renewable energy producers—whether large-scale wind and solar farms or households with rooftop solar—earn Renewable Energy Certificates (RECs) for every megawatt-hour (MWh) of electricity they generate. Electricity retailers had to buy a set number of these certificates each year to meet their legal obligations, effectively funding the rebates and incentives that made rooftop solar affordable for hundreds of thousands of early adopters.

2007–2010 – The Boom Begins (~250,000 installations by 2010)
Generous energy feed-in tariffs and government policies and rebates triggered Australia's first rooftop solar boom. Falling panel prices after 2007—driven largely by Chinese mass production—made rooftop solar financially attractive, even as tariffs were reduced. Households could sell surplus power to the grid, transforming solar from an eco-choice into a smart investment.

Fixed-Rate and Net Feed-in Tariffs (2000 - 2010)
Feed-in Tariffs (FiTs) are financial incentives that pay households for the excess electricity their rooftop solar panels export to the grid. Under FiTs, energy retailers or governments pay system owners a set rate for each kilowatt-hour (kWh) exported.

Introduced in Australia in the mid-2000s, FiTs were a cornerstone of early solar policy. They transformed rooftop solar from an environmental gesture into a sound financial investment, driving the first national solar boom between 2007 and 2010. During this period, many state governments offered generous, fixed-rate "gross" FiTs, where solar owners were paid for all electricity generated by their system, not just what they exported. Rates could exceed 40–60 cents(c)/kWh, far higher than retail electricity prices, which meant households could recover their solar investment in just a few years.

In the 2010s, most states transitioned from gross to net tariffs, paying only for surplus electricity exported after household use. This change reduced overall payments but reflected a maturing market where solar was increasingly cost-competitive.

Solar Homes and Communities Plan (2007 - 2009)
The Solar Homes and Communities Plan (SHCP) marked the first large-scale expansion of federal support for household solar in Australia. It was introduced in 2007, during the transition from Prime Minister John Howard's government to Prime Minister Kevin Rudd's, and became one of the most impactful early solar programs in shaping Australia's clean energy future.

The SHCP offered cash rebates of up to AUD $8,000 for households, schools, and community organisations installing small-scale rooftop solar systems up to 1 kW in capacity. The rebate was designed to cover a significant portion—often 40–50% of total installation costs, at a time when a 1 kW system typically cost between $12,000 and $15,000.

Queensland rooftop solar owner Bianca, 2025

Between 2007 and 2010, the SHCP helped drive Australia's first major rooftop solar boom, resulting in approximately 250,000 installations nationwide.

Solar Credits Scheme (2009 - 2011)
The Solar Credits Scheme was an Australian Government initiative introduced in 2009 under Prime Minister Kevin Rudd as part of reforms to the national Renewable Energy Target. Depending on system size and certificate prices, households typically received $4,000 to $7,000 off the cost of a 1.5–3 kW solar system.

The Solar Credits Scheme played a short but crucial role in bridging Australia's early solar rebate programs and the modern incentive system that still drives rooftop solar uptake today.

2011–2015 – Costs Plunge, Uptake Soars (~1.5 million installations by 2015)

The Small-scale Renewable Energy Scheme was introduced on 1 January 2011, replacing the RET and the Solar Credits Scheme to offer households a generous discount on rooftop solar systems. Global demand, leveraging Australian technology, drove rooftop solar system prices down by over 70%. By 2014 - 2015, rooftop solar had become the cheapest source of household power.

Small-scale Renewable Energy Scheme (2011 - 2030)
The Small-scale Renewable Energy Scheme (SRES) offers upfront discounts on solar panels through Small-scale Technology Certificates (STCs), which represent the energy a system is expected to generate before the scheme ends in 2030.

In 2011, households installing a 3.3 kW solar system (8-10 solar panels) could receive rebates worth around $6,000 to $7,000, covering nearly half the total installation cost at the time. By 2025, a typical home installing a 3.3 kW system now receives about $1,500 to $1,800 off the total price, depending on location and certificate values. However solar panels have become far cheaper and more efficient, keeping payback periods short despite the reduced rebate.

The SRES began in 2011 under Prime Minister Julia Gillard and has continued through a total of six successive governments, gaining widespread bipartisan support and undergoing various regulatory changes to improve the scheme. It became a cornerstone of Australia's household solar policy, contributing to over a million installations within a few years.

In 2025, this rebate has undergone regulatory change and is now inclusive of home batteries, under Prime Minister Anthony Albanese's Cheaper Home Battery Program (see page 20 for more details).

Solar Citizens CEO Heidi Lee Douglas in front of a suburban home covered in solar panels.

2016–2020 – Solar Goes Mainstream (~3 million installations by 2021)
Rooftop solar became a standard feature of new homes. States like Queensland, South Australia, and New South Wales (NSW) led adoption, pushing national capacity past 10 GW

Market-based Feed-in Tariffs (mid 2010s - 2020s)
During the mid-2010s, state regulators and energy retailers began transitioning away from fixed rate/ net FiTs and replaced them with market-based FiTs–whereby the price per kWh was based on wholesale electricity prices and could fluctuate daily and seasonally. This tied solar rewards more closely to the real-time value of energy in the grid, determined by the basic economics of supply and demand. As a result average FiT rates dropped from 40–60 c/kWh to more modest levels around 6–12 c/kWh in most states.

While this reduced the direct export income for households, it coincided with dramatically falling solar installation costs. Overall system payback periods remained competitive at 5-8 years for most households and continued to deliver excellent returns because owners used more of their generation on-site and bought less electricity from the grid.

As battery storage entered the mix, some states (like Victoria and South Australia) introduced time-varying or dynamic market-based FiTs, rewarding exports when the grid most needs power—usually late afternoon or early evening. This change to FiT structures has been an impetus for many solar owners to install a battery and take advantage of the higher FiTs during evenings and peak demand periods.

2021–2024 – A Solar Nation (Over 4 million installations)
Australia now has the highest per-capita rooftop solar uptake in the world, with roughly 1 in 3 homes generating their own electricity. Combined with home batteries, electric vehicles, and smart energy management, rooftop solar is transforming the grid from centralised generation to community-powered energy. Rooftop solar curtailment was first implemented in South Australia in 2021 to maintain grid stability.

Rooftop Solar Curtailment
Rooftop solar curtailment occurs when excess solar electricity generation is restricted from entering the grid, usually due to low demand or grid stability constraints. This is done to prevent overloading the network, maintain voltage stability, or avoid blackouts. Curtailment ensures safe grid operation but means that some potential solar energy is temporarily wasted instead of being used or exported. The answer to this is battery storage, outlined on the next page.

2025 & Beyond – The Battery Boom
With cheaper home batteries, VPP technology, vehicle-to-grid and smarter energy management, Australia is improving grid resilience while continuing to expand rooftop solar and household energy independence and interconnectedness. On 1st July 2025, the Australian Federal Government launched the Cheaper Home Batteries Rebate Program enabling households to soak up their excess energy to be used at night, helping to bring down energy prices for everyone, support the electricity grid, and reduce reliance on coal-fired power.

Between 1 July 2025 and 31 October 2025, over 100,000 behind-the-meter batteries were installed in Australia, demonstrating the enormous success of this program. This rapid uptick in installations has more than doubled the storage capacity to the National Electricity Market (NEM), adding an additional 2GWh. The average household battery system size has also increased to 18.5kWh during this time. This larger size is due to households taking advantage of the subsidy to invest in greater capacity, as larger systems can offer better value per kilowatt-hour.

Solar Citizens' former Campaigns Director Joel Pringle; CEO Heidi Lee Douglas; 'Mr Battery' mascot; DER Expert Dr Gabrielle Kuiper; and Global Solar Council Director Danny Kennedy, November 2024

Cheaper Home Batteries Program (2025)
The Cheaper Home Batteries Program is a federal government program offering financial support to households for installing home battery systems. It lowers upfront costs by at least 30%, encourages energy storage adoption, and increases resilience by enabling households to store and manage their solar energy efficiently. The program allows for eligible systems with a nominal capacity between 5 kWh and 100 kWh. The rebate covers the first 50kWh of a battery's usable capacity, and the battery must be able to connect to a VPP.

Case Study

Ken and Corinne Enderby are retired teachers living in Sydney, New South Wales. They first installed solar in 2012 and since then have installed a home battery, an electric heat pump hot water system and an efficient induction cooktop which allowed them to disconnect their home from gas entirely. The Enderby family made use of government incentives like the SRES to install their solar panels, battery and heat pump.

In 2024 Ken and Corinne replaced their petrol car with a plug-in electric vehicle, and around the same time they installed a second, larger solar system backed up with a behind-the-meter battery. They power their house and their car from their home solar panels and batteries, and are saving thousands of dollars on energy and fuel bills annually.

Challenges and Lessons from Australia's Rooftop Solar Success

Challenge: Integrating Solar into the Grid

- High rooftop solar penetration if not combined with battery storage can create grid stability issues, sometimes requiring solar curtailment when supply exceeds demand.

Lesson: Storage Matters

- Home batteries, virtual power plants, and smart energy management reduce curtailment, improve grid stability, and allow households to use more of the solar energy they generate on their rooftops.

Challenge: Ensuring Energy Equity

- In Australia more than one-third of the population rent or live in apartments, making it harder for them to access rooftop solar and storage solutions.

Lesson: Government Support is Key

- Early policy intervention and targeted programs—such as SolShare, social housing rooftop solar initiatives, and battery rebates—are essential to ensure that all households, not just homeowners, benefit from the transition to clean energy. Solar Citizens Raise the Roof Australian campaign is aiming to secure policies that address this inequity.

Solar Citizens supporters, November 2024

Challenge: Scaling Technology Across Households

- As rooftop solar adoption rose (2011–2015), the grid and installers faced scaling challenges, from supply bottlenecks to technical issues.

Lesson: Infrastructure and Industry Readiness Matter

- Supporting a skilled installer network and robust supply chains ensures rapid adoption without delays or quality issues.

Challenge: Managing Rapid Growth on the Grid

- By 2020, rooftop solar had reached millions of homes, occasionally creating voltage and stability issues.

Lesson: Smart Coordination is Critical

- Virtual power plants, smart inverters, and energy management systems help integrate distributed generation without compromising grid reliability.

Expert View

Tristan Edis - Challenges and Lessons

“The evidence shows that solar system curtailment due to excessive voltage is relatively minor at present and there is scope to better manage voltage at modest cost to integrate additional solar capacity.

Distribution networks vary in their physical characteristics across different locations, and some are more readily equipped than others to handle high levels of rooftop solar penetration.

Once batteries become more widespread, this will substantially mitigate the voltage rise created by solar– because once a battery is coupled to the solar system it soaks up almost half of the generation that would otherwise be exported to the grid.

Rooftop solar, if it is increasingly coupled with battery storage, could be a very valuable tool in decarbonising our electricity sector rapidly and importantly, also injecting greater competition into the electricity market and lowering household energy costs.

But we also perceive a risk that is seen by some policy makers as an uncontrollable, nuisance weed, whose growth needs to be curtailed.”

“We certainly need to be more thoughtful about how we roll-out solar and the importance of coupling it with batteries and other demand management tools. But it could be so much more useful than an uncontrollable, proliferating weed if we introduced new policies to help roll-out technologies that can shift electricity demand to make better use of solar.”

Tristan Edis is the Director of Analysis and Advisory at Green Energy Markets, and is a leading expert on the economics of Australia’s renewable energy transition.

Beyond Freestanding Houses: Unlocking New Rooftops

Virtual Power Plants

2025 has seen Australia at a turning point in its consumer energy trajectory – boasting over four million solar homes and businesses, thousands of batteries being installed every week since 1 July, and the exciting potential of vehicle-to-grid technology just beginning to be realised. Flexible, distributed and coordinated energy solutions are key to integrating high levels of renewable energy and giving consumers more control over their electricity.

By aggregating the shared energy potential of these assets and leveraging Artificial Intelligence (AI) to control loads and outputs in response to the needs of the grid, VPPs have enormous potential to completely reshape how we generate, use, and share electricity – now and into the future.

A VPP is a network of distributed energy resources, such as rooftop solar panels, home batteries, and smart appliances, that are centrally coordinated to operate like a single large power plant. VPPs allow households to store, share, and sell electricity, help balance the grid, reduce peak demand, and create new revenue streams for participants, while supporting the integration of renewable energy.

In fact the Australian Energy Market Operator forecasts that by 2030, 60 per cent of consumer storage capacity will be “coordinated” – requiring a huge uptick in VPP uptake as well as rapid progress towards Australia’s target of one million batteries.

Mr Battery and Ms Solar Power visit a Sydney home with solar and a home battery, March 2025

Done right, VPPs can help democratise our energy system. They can turn homes into active participants in the wholesale electricity market, help bring down bills for homes and businesses, and share the benefits of clean energy with renters, apartment dwellers, and social housing tenants. But to get there in Australia, we need more transparency, fairness, and enforceable consumer rights for VPPs–so VPPs actually work for the people powering them, not the profits of big energy retailers.

Peer-to-peer Energy Trading

Peer-to-peer (P2P) energy trading allows households with rooftop solar to sell excess electricity directly to neighbours or other consumers, often using blockchain or digital platforms. It decentralises energy markets, empowers consumers, and helps match local renewable generation with local demand, reducing strain on the wider electricity grid.

P2P energy trading is rapidly emerging as a promising way to share locally generated solar electricity between households, enabling neighbours to directly buy and sell excess energy. While the concept is gaining attention, its widespread adoption in Australia is still constrained by limited regulatory frameworks, network rules, and market access for smaller-scale participants.

Case Study

Mamoon Reza installed solar panels and a battery to his home in Sydney, to help his family save money on their energy bills. As he learnt more about the financial and environmental benefits rooftop solar brings, he realised that many people in society are missing out and he wanted to help change that.

He came across peer-to-peer energy trading and has established a small energy sharing network which allows solar to be shared between houses. Mamoon helps his neighbour who isn't able to install solar by selling his excess solar energy to her at an affordable price so that she too can access cheap clean energy.

Batteries-on-Wheels

In Australia, vehicle-to-grid (V2G) is an emerging technology that holds promise for empowering electric vehicles to be “home batteries on wheels”, enhancing grid stability, managing peak demand, and integrating renewable energy sources, with significant financial benefits for all energy consumers, including those without an EV.

V2G technology allows electric vehicles (EVs) to send stored electricity from their batteries back to the grid. When connected, EVs can help balance supply and demand, support renewable integration, reduce peak electricity costs, and provide additional revenue opportunities for owners. Essentially, EVs act as mobile energy storage units, turning everyday transport into a flexible grid resource.

Solar Citizens CEO Heidi Lee Douglas outside Federal Parliament with members of ‘Parliamentary Friends of EVs’, February 2024

It has been estimated by the Australian Renewable Energy Agency (ARENA) that if enabled, V2G could account for over a third of total energy storage by 2030, deferring the need for $94 billion in large-scale battery storage investment.

To fully realise these benefits, Australia needs broader deployment, supportive policies, and streamlined market participation, ensuring these technologies can scale and deliver cheaper, cleaner, and more resilient energy for all.

Unlocking Every Rooftop

In 2025 approximately 39% of households in Australia have installed rooftop solar. Renting or living in an apartment is a major reason for not having rooftop solar–and as a result uptake has so far been much lower amongst these demographics.

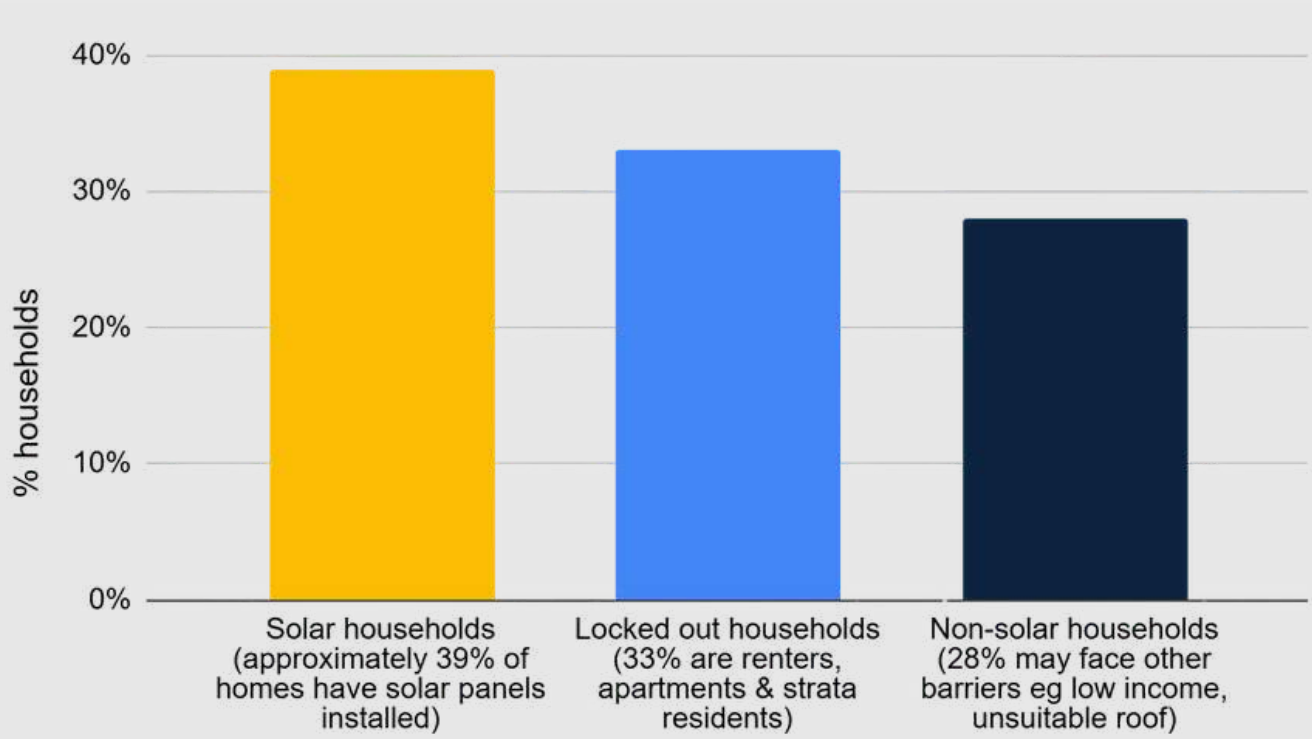


Figure 4: A graph showing the percentage of: Australian homes with rooftop solar; homes without solar due to renting or living in an apartment; and homes without solar for other reasons

One-third of Australians rent, live in an apartment or social housing and do not have complete ownership of their home's rooftop, and there have been a lack of policies to support uptake of rooftop solar on rental properties. As a result, solar PV uptake rates amongst these groups are currently significantly lower compared to owner-occupied standalone dwellings.

47% of apartment residents are also renting which creates a split incentive not only between landlord and tenant, but with the owner's corporation too. This also applies to social and community housing, whereby residents are technically renters and the state government or community housing provider plays the role of the landlord. Many social housing properties are also multi-dwelling apartments.

There is an opportunity for Australian governments of all levels to better support renters, strata and apartment residents to retrofit, electrify and decarbonise their homes, and this may take the form of financial incentives, providing informative resources, and strata policy change.

Apartments & Strata

For the four million Australians living in a strata scheme, making sustainability and efficiency upgrades can be challenging. In 2024, just 3.3% of strata schemes in Greater Sydney have rooftop solar compared to over 32% of residential houses.

Strata refers to multi-unit residential or commercial buildings—like apartments, retirement living, and townhouses—where occupants own individual lots but share common infrastructure such as roofs or car parks. Strata is managed by an owners' corporation or strata association, which makes decisions on shared property and collects levies from lot owners to fund maintenance, upgrades, and shared services.

In energy policy, strata often presents challenges for solar and other upgrades because decisions must be made collectively by owners' corporations and residents may choose to vote against an upgrade being made.

Apartment living in Australia has increased by 78% over the last 25 years, resulting in one in ten Australians now living in an apartment. In urban areas such as the City of Sydney, it's as high as 80% of the population. High-rise living in particular is becoming increasingly popular in Australia, making up over a quarter of all apartment dwellings.

To support apartment residents in accessing renewable energy, Australian governments have introduced targeted programs and incentives.

Solar Citizens' Community Organiser Tahlia Munro at Sun Day event, September, 2025

Solar Citizens take action at NSW Parliament to support cheap, clean, solar power, November 2023

SolShare

Allume Energy's SolShare technology was invented in Melbourne and first installed in 2017. SolShare allows a single rooftop solar system to be shared across multiple units within a strata building. It works by monitoring and distributing solar energy to each apartment unit in real time. This enables residents to access cheaper, cleaner electricity without installing individual systems, overcoming common barriers in multi-unit buildings and making rooftop solar more equitable for renters and apartment dwellers. SolShare has since expanded across Australia, providing a scalable shared-solar solution.

Solar for Apartments Rebates

In both Victoria and New South Wales, the Solar for Apartments programs provide generous rebates of up to 50% for rooftop solar systems that must be shared among all units in a building–typically using SolShare technology. This ensures all residents—including renters—benefit from cheaper, cleaner electricity. These initiatives overcome the barriers of individual rooftop access in strata buildings, helping urban Australians reduce energy bills, cut emissions, and participate in the clean energy transition even without owning a home.

While these programs are effective, current rebate schemes reach fewer than 2% of strata schemes, highlighting the need for continued investment.

Community Solar Banks

The Australian Federal Government's Community Solar Banks Program, with co-funding from State Governments, supports shared solar projects with the goal of helping 25,000 apartment residents, renters, and low-income households to benefit from solar energy.

In the Australian Capital Territory, the "Solar for Apartments" program will help about 2,100 apartment households access shared rooftop solar via grants/interest-free loans.

In NSW, the program supports two streams: a shared 'Solar for Apartments' program utilising Solshare technology, and funding for locked out households to access energy bill savings via a 'Solar Garden'.

Tahlia engaging with local residents at Solar Citizens Sun Day event, September 2025

Solar Gardens

Solar gardens let people who can't install panels at home—like renters or apartment dwellers—buy or subscribe to a share of a larger, off-site solar farm. They receive credits on their electricity bills for the energy generated. Haystacks Solar Garden in New South Wales is Australia's first large-scale example, enabling over 300 households to benefit from shared solar power without rooftop access.

High Rise Apartments

The challenge of installing rooftop solar is greater for high-rise apartment buildings, than for low to mid-rise buildings. Taller and narrower buildings provide limited roof area for solar technologies, relative to the number of dwellings and total building size.

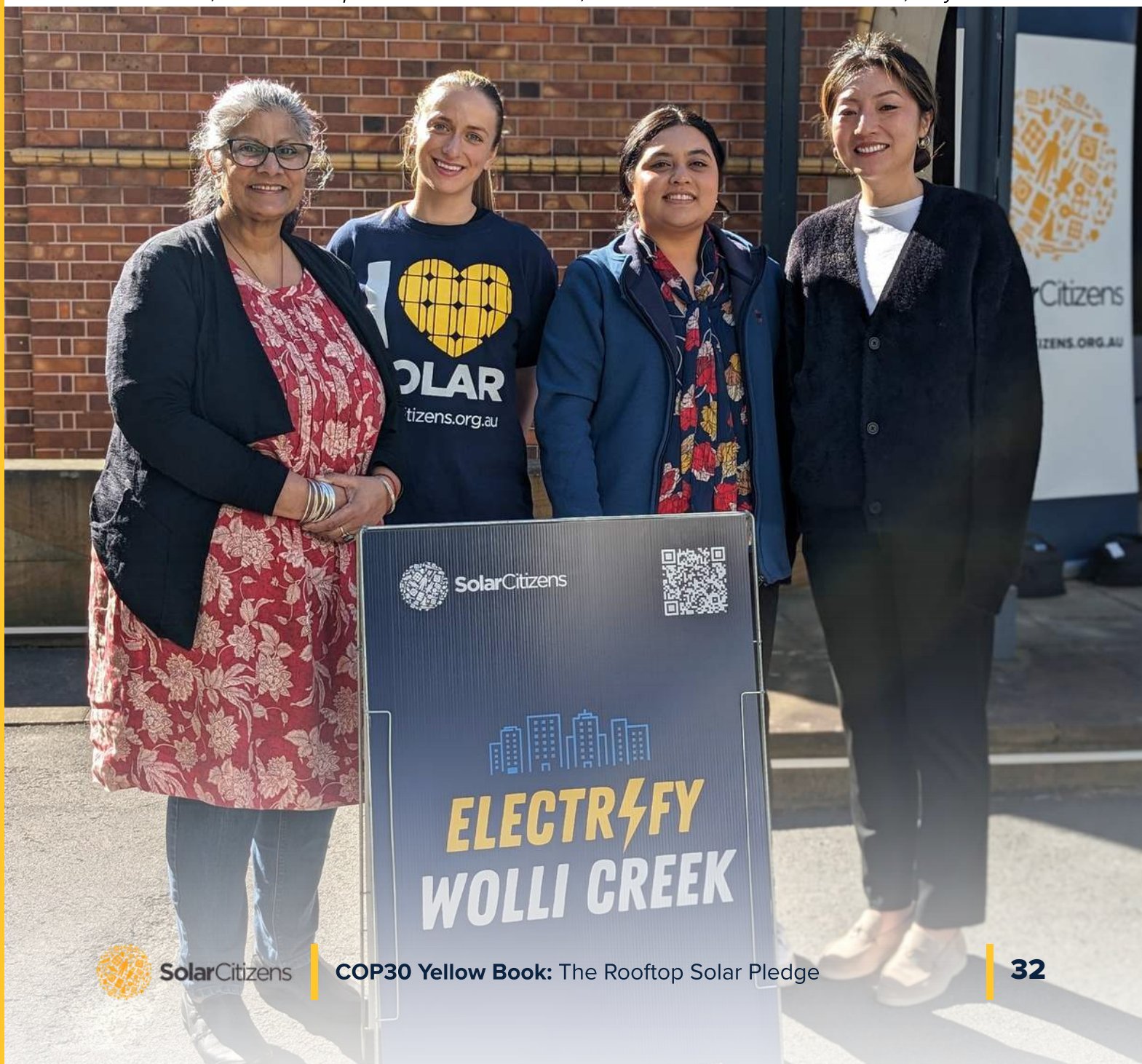
To date there has been no government incentive program targeted at supporting high-rise buildings, and technologies such as Solshare are less suitable for larger buildings especially where roof space is limited.

Case Study

Electrify Wolli Creek is a community advocacy project led by Solar Citizens to highlight the issues faced by high-rise apartment residents when they try to retrofit rooftop solar and electrification upgrades.

The project focuses on Wolli Creek, in Sydney's south, where 98% of residents live in an apartment, the vast majority of which are high-rise. Throughout this project, Solar Citizens works closely with local residents to (a) identify the key barriers to electrification; (b) explore the available solutions, and (c) highlight the specific policies required from local, state and federal governments to enable locked out households to access the benefits of renewable energy and clean transport.

Sydney Community Forum Executive Officer Asha Ramzan; Solar Citizens' National Advocacy Lead Charlie Rodrick; and workshop facilitators Nusrat Islam, and Lina Chen Pan in Wolli Creek, May 2024



Social Housing Energy Performance Initiative (SHEPI)

SHEPI is a federal program co-funded by states and territories to improve the energy efficiency of social housing. It supports upgrades like insulation, efficient appliances, rooftop solar and batteries, reducing bills and emissions while making homes healthier and more comfortable for low-income Australians.

Unlocking Solar for Renters

There are almost three million rental homes in Australia, yet to date there has been no assistance from the Australian federal government to progress to enable renters to have access to rooftop solar or other household renewables. Most renters remain excluded because they don't control their dwelling, and while some states have begun trialling targeted incentives, these programs provide only limited reach.

Queensland's Supercharged Solar for Renters program will support up to 6,500 landlords and tenants to install solar and share the benefits, while Victoria's Solar for Renters scheme has provided landlords with rebates and low-interest loans, so far helping over 5,000 renters access solar savings.

While many renters live in an apartment, there are 2.2 million freestanding homes–which together could host up to 12 GW of solar potential—enough to make a significant dent in energy bills and emissions if landlords were supported with incentives. Much more needs to be done: expanding community solar banks, scaling shared solar schemes, and introducing stronger rooftop solar incentives for landlords are essential to ensure renters can benefit from cheaper, cleaner energy. Without significant action, the majority of renting Australians will continue to miss out on the financial and environmental benefits of household renewables.

Solar Citizens' National Advocacy Lead Charlie Rodrick in Wolli Creek, July 2025

Case Study

Annie Loo lives in Perth, Western Australia. Despite the state's abundant sunshine, Annie has never been able to install solar because she doesn't own her home.

After a decade of renting and faced with rising living costs and energy bills, she often feels frustrated at being unable to access the financial and environmental benefits of rooftop solar. She's calling for more government funding and programs that make solar and other energy upgrades accessible to renters—so everyone, not just homeowners, can cut bills and benefit from clean energy.

Urban Renewable Energy Zones

An Urban Renewable Energy Zone (UREZ) is defined as “a zone within an urban area that supports high levels of small-scale and medium-scale renewable energy penetration, facilitates the decarbonisation of cities, helps the wider energy system and drives local socio-economic benefits.”

Some building types can only meet 5% of their energy needs through rooftop solar (e.g., high-rise residential apartments and offices) - while some Commercial and Industrial (C&I) buildings such as warehouses and factories have potential to meet 500% - 1000% of their energy needs with rooftop solar.

However, there is currently a lack of incentive or systems in place in Australia to enable the C&I sector to export clean, cheap energy to the local community.

Incentivising oversized solar and battery systems on large urban and suburban C&I buildings will help to create more clean energy supply within the local distribution network which can then be exported to locked out households (renters, apartment residents etc) and high-rise buildings (residential and commercial) where the lack of roof space is a limiting factor.

The New South Wales Government has committed funding to establish Australia’s first UREZ in the Illawarra region. Additional investment and policy initiatives are required from Federal, State and Territory Governments to ensure that all cities and towns can benefit from locally produced clean, cheap energy, as soon as possible.

Strong coordination is required from governments to ensure that UREZ pilots and longer-term projects are set up to be fair, transparent and consumer-centric, with a key outcome being reduced energy bills for local homes and businesses.

Unlocking “Big Roofs” - Commercial and Industrial solar

Commercial and Industrial CER remains an untapped opportunity in Australia. The C&I segment comprises businesses and organisations - including manufacturing facilities, warehouses, offices and retail outlets – which typically have larger roof spaces and also consume significantly more energy than residential and small business users.

As of June 2025, the installed rooftop solar capacity totalled 24 GW within the Australian National Electricity Market (NEM) states - with the C&I sector accounting for an estimated 5 GW (21%) of this. The unrealised potential for C&I rooftop solar in the NEM currently sits at 23 GW - almost as much as what is currently installed therefore representing a significant opportunity for the grid, for emissions reduction, and for communities.

Unlocking large C&I solar and storage and establishing UREZs in cities and towns will help to achieve a fast and fair transition to 100% renewable energy, by:

- Providing additional low-cost generation and storage capacity to replace coal
- Utilising the exciting distribution network rather than requiring new transmission infrastructure (that is costly and too often delayed due to social license issues)
- Ensuring the cost-of-living benefits of locally generated clean energy are shared with local households and communities.

Australian-made energy storage company RedEarth, based in Queensland

Case Study

David Stuart, Managing Director of Colormaker Industries is a shining example of how the commercial and industrial sector can lead on clean energy solutions. The Sydney factory runs entirely on renewable energy, powered by a 100 kW solar array and backed by a custom-built battery. They've switched to electric vehicles for local deliveries, removed microplastics from products, and turned cardboard waste into packaging with a mega shredder.

The excess solar energy produced on-site is stored in the factory's battery where it can be used in the evenings, or sold back into the grid, ready to be shared with neighbouring homes including rental properties and apartments. More government support and stronger standards are required to better enable more businesses like David's to play a role in supporting the community with clean energy production.

Expert View

“Commercial and industrial businesses have enormous potential to host solar and batteries but are consistently overlooked by policy and are stuck in limbo.

One of the biggest hurdles is convincing businesses to participate, followed by the tenant versus owner-occupier issue, which is especially challenging in commercial property. Even once a business is ready, the connection process is so expensive, slow and inconsistent that it can make projects commercially unviable.

With the right policy and regulatory settings, commercial rooftops could become one of the fastest, cheapest and most socially acceptable sources of new renewable energy.

“Unlocking C&I resources could avoid $11 billion in network costs by 2040 while giving businesses lower bills and governments the reliability they need. It’s a win-win-win.”

Stephanie Bashir is the CEO of Nexa Advisory and is one of Australia’s leading experts when it comes to evidence based policy to accelerate the clean energy transition.

Conclusion: The Peoples' Power Revolution

Australia's rooftop revolution proves that bold policy, community leadership, and technological innovation can transform an energy system from the ground up. But the next phase of this transformation must be regional—and inclusive. Raise the Roof calls on governments and citizens across the Asia–Pacific to unite behind a shared pledge: to scale rooftop solar and battery storage so that every household–from Sydney to Suva; Tokyo to Taipei; Bangkok to Busan and Hong Kong to Ho Chi Minh City–can access clean, affordable energy.

As we look ahead to COP31, this campaign will build a coordinated alliance, deliver a shared policy blueprint, and drive tangible commitments that double rooftop solar capacity and democratise clean energy access. Together, we can make rooftop solar not just an Australian success, but a defining achievement for the entire region–a global model for people-powered climate action.

Mascots Mr Battery, Ms Solar Power and Sunny promote the benefits of solar power and home batteries

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Join the Rooftop Solar Alliance

Solar Citizens is inviting civil-society and NGO partners across the Asia-Pacific to join the Rooftop Solar Alliance. Get in touch to learn more.

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