

A global business

Pressure is also mounting on the balance-of-system costs. The market for mounting systems is increasingly becoming an international logistics operation

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o Highlights

- While the production of solar cells has always been very capital-intensive, mounting systems were long considered a means of low-threshold access allowing small enterprises to enter the solar business.
- This has, however, changed: those who really want to get involved need to be internationally active and not just be able to supply large projects, but also plan and build them.
- Medium-sized companies can manage this with skill and dedication, however the competitive pressure and cost pressure is enormous.

GameChange Solar LLC isn't afraid of making a bold statement. »Repowering the Planet« is the slogan used by the mounting system manufacturer headquartered in New York. Founded in 2012 and active on the market since 2013, the company claims to have sold substructures for 1.3 gigawatts of photovoltaic capacity by early November 2013. Its own credo is the manufacture of »the simplest, strongest, easiest to assemble, lowest cost solar racks in the industry«.

Barron Group Holdings LLC is the company behind GameChange, which has made investments with a volume totaling around US \$480 million since 2002, the majority of them in the cleantech industry. Andrew Worden, founder and CEO of GameChange, is also a manager at Barron. GameChange is announcing new sales success stories in rapid succession and is thereby arousing the attention of the media to an extent which even manufacturers of solar

cells rarely enjoy, and which is completely alien in the mounting system sector. »GameChange Racking's Smart Push on Dumb Racks in Solar« was the title in »Forbes« in May 2015, which reported about »a better rack at lower cost«. Systems for greenfield arrays on a power plant scale »can come in at 18 to 24 cents per watt, all-in«, therefore including the cost of labor for assembly.

It is safe to assume that the managers at the ambitious mounting system newcomer present quite different figures to their negotiating partners in the project business. Because 18 to 24 cents are simply far too little to change the game.

While prices for solar power systems do indeed vary widely in different countries, on a megawatt scale in particular, the differences – with exceptions such as Japan – are not as large as for medium-sized systems, or for the rooftop segment. This, in turn, is due to the fact that the

cost pressure on part of the project planners is particularly high. The target for a turnkey solar park is therefore no more than \$1,000 per kilowatt in all significant markets. This is the net price that must not be exceeded for projects involving several hundred kilowatts. So too do systems between approximately 30 and 100 kilowatts now have to keep to this limit, and it is now the target price in Germany, for example, for the typical small arrays erected on single-family detached homes.



32MW GameChange system type mentioned in Photon article