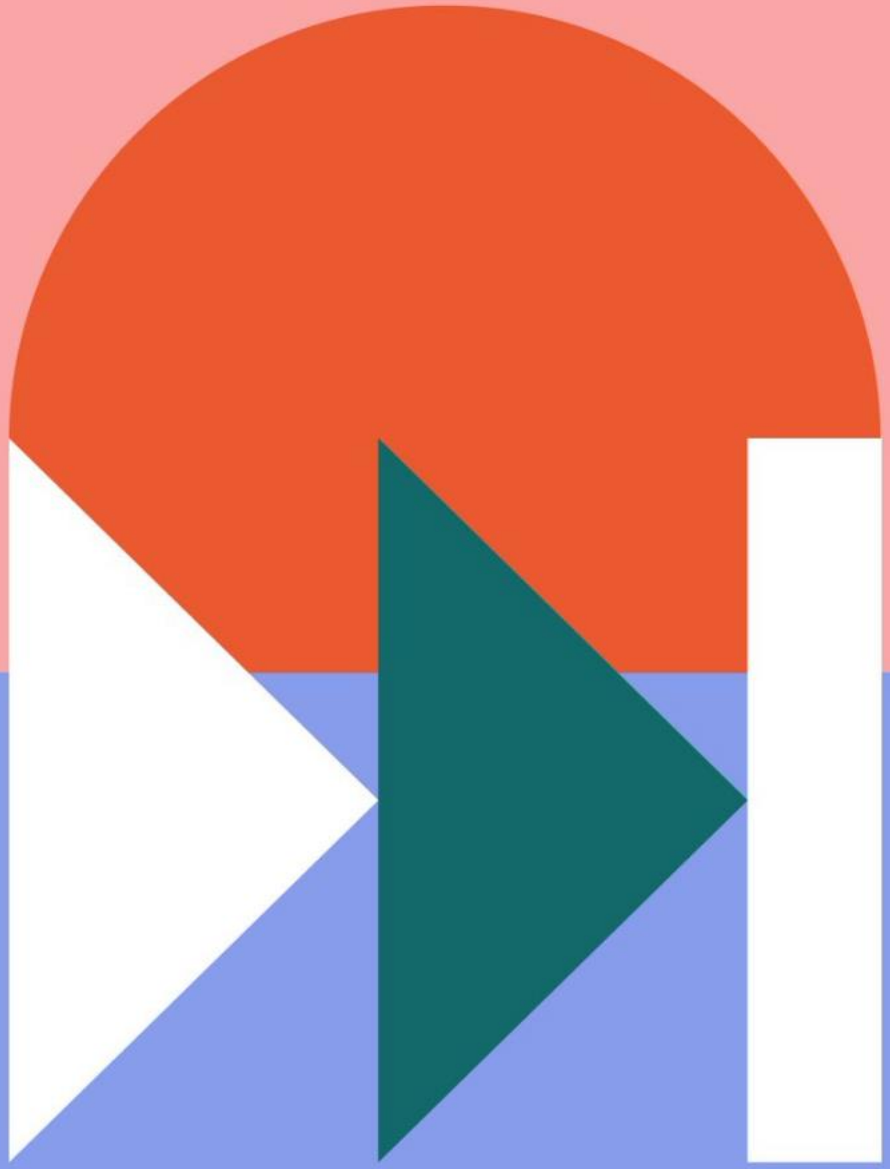
A European industrial strategy for PV

Eufores - 21&22 October 2023, Berlin

22nd Inter-Parliamentary Meeting on Renewable Energy and Energy Efficiency, 21&22 October, Berlin, Germany

Walburga Hemetsberger

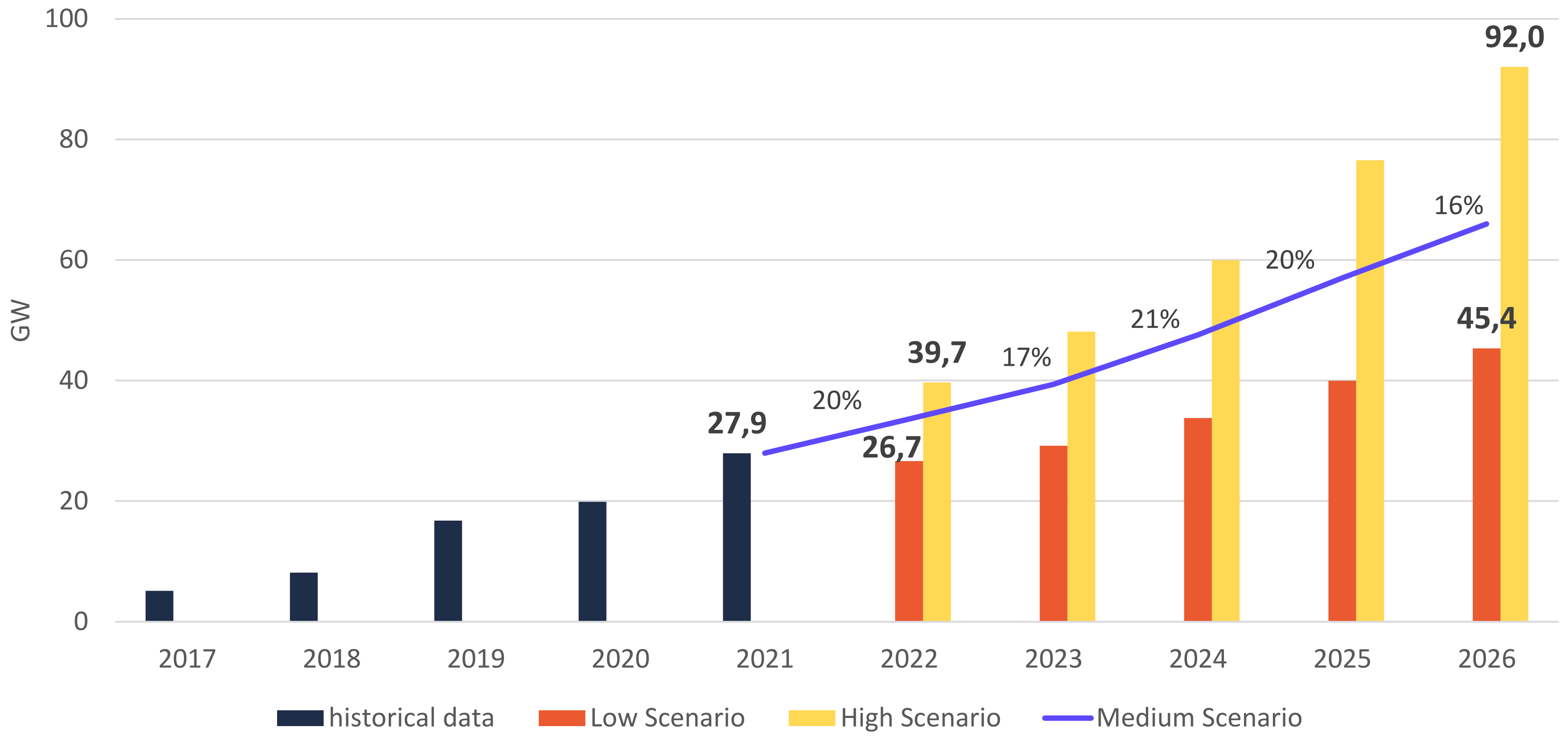
CEO SolarPower Europe



REPower EU – only "fast forward" will get us out of the crisis

- 45% Renewable target
- Ambitious Solar Rooftop mandate
- Faster Permitting
- Skills

Versatile Solar PV can support EU energy independence - fast



Our May forecast sees EU solar market to add in High Scenario 40 GW in 2022, a 60 GW market as soon as 2024 and 92 GW new capacity in 2026. That’s already way too conservative

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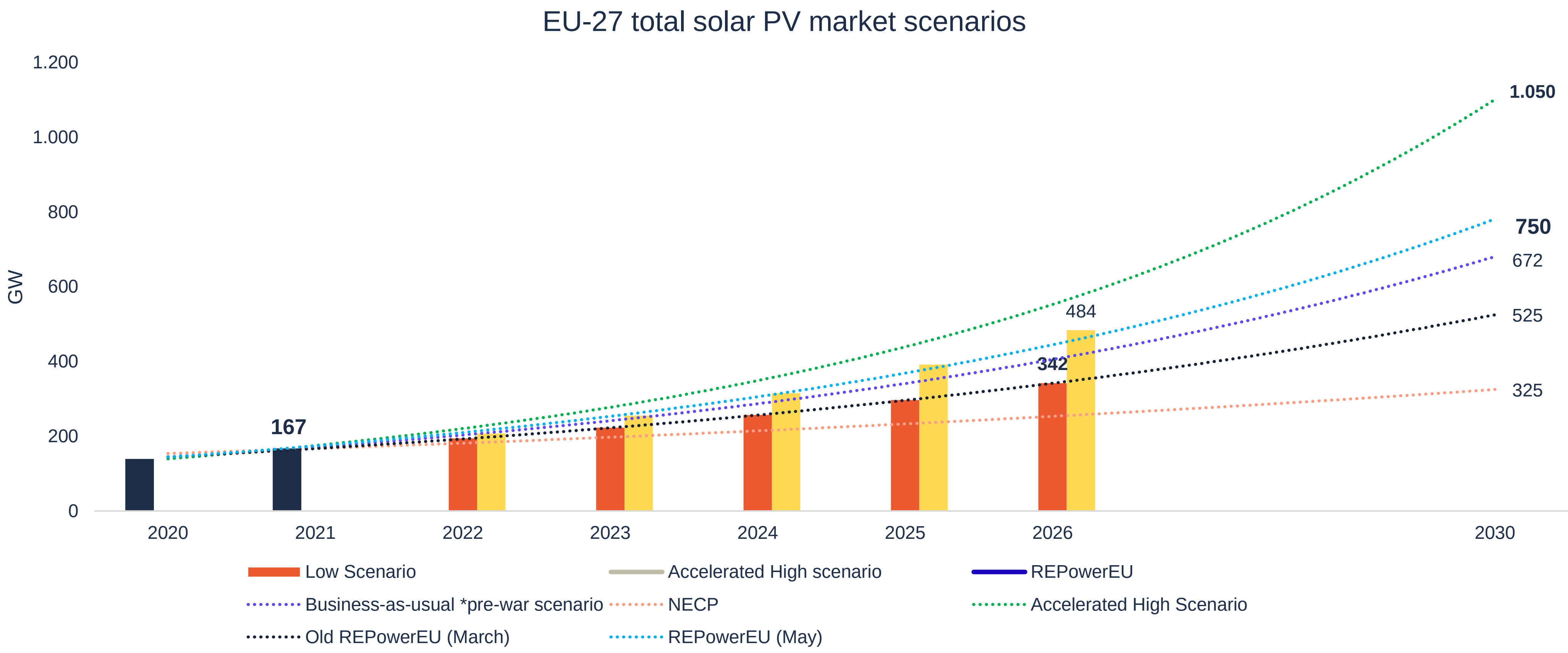
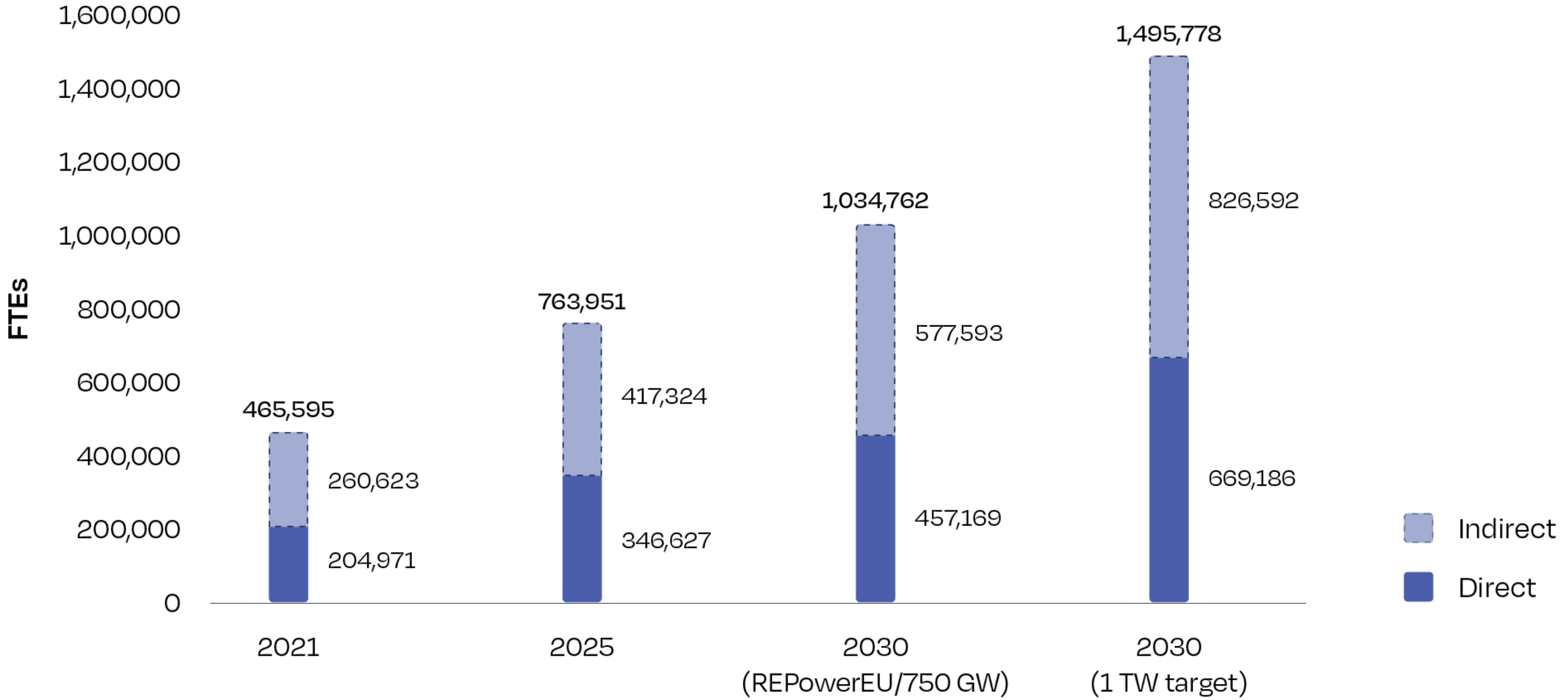
With the right policy framework solar PV can reach 1 TW by 2030



1 TW solar by 2030 corresponds to 117 bcm saved per year

Providing more than 1 Million Jobs – latest by 2030



Under the REPowerEU scenario, solar jobs more than double compared to 2021, reaching 1 millions FTEs in 2030. However, with a 1 TW target solar jobs would further increase to 1.5 millions FTEs by the same year.

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REPowerEU

EU Solar PV Industry Alliance

- EU Solar PV Industry Alliance targets 30 GW domestic manufacturing by 2025
- Should translate to annual/biannual ministerial meetings (like Battery Alliance)
- Will map & co-ordinate EU funding potential - including Innovation Fund
- Supports efforts to establish IPCEI for Solar

#EUSOLARSTRATEGY

A NEW EU SOLAR PV INDUSTRY ALLIANCE

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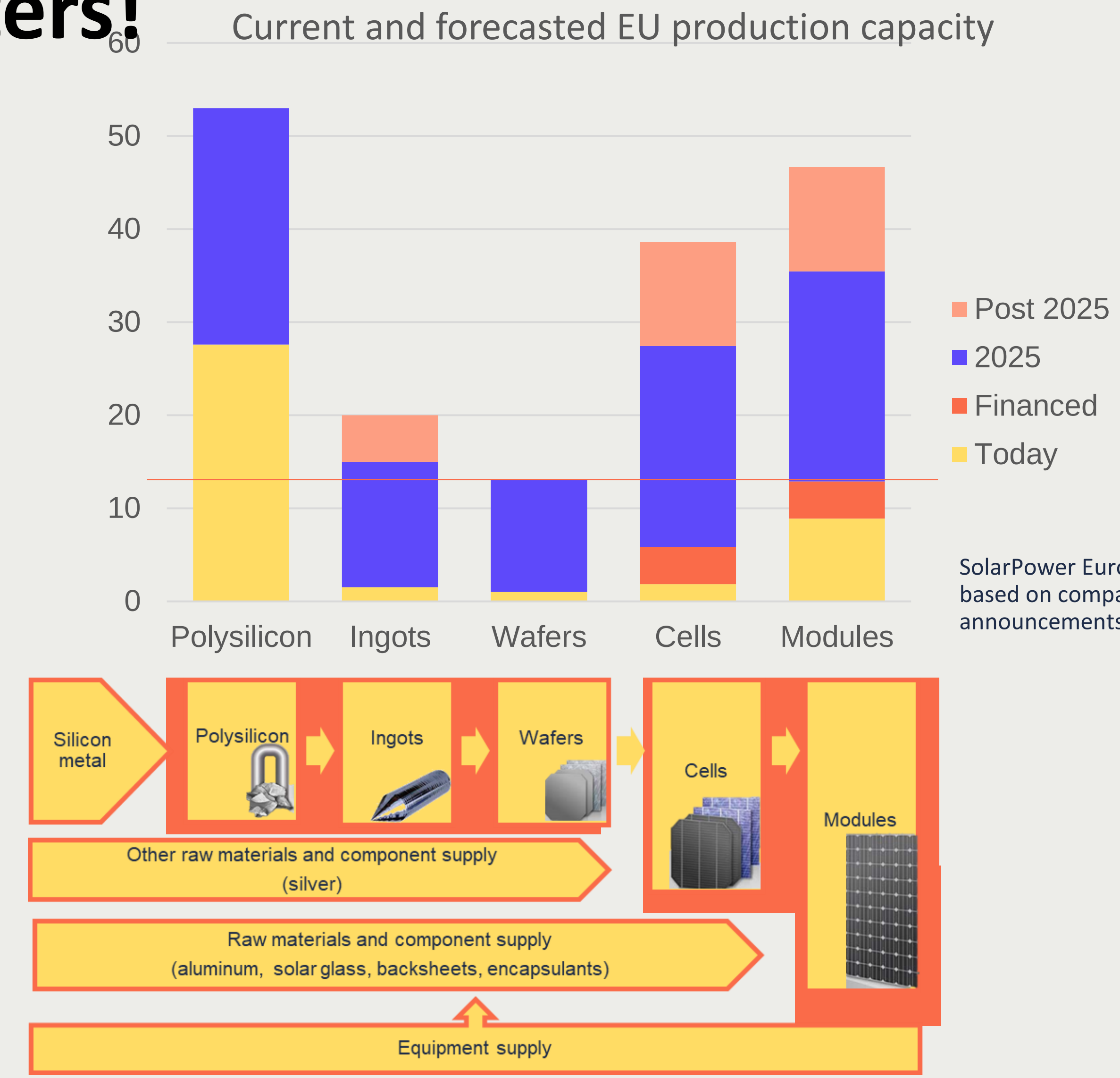
Why EU PV Industy Alliance asks for 30 GW production until 2025? – Scale matters!

Investments are needed along the value chain

In certain segments today's production levels are low to sub-GW level, e.g. ingots and wafers



SolarPower Europe's estimates based on company announcements.

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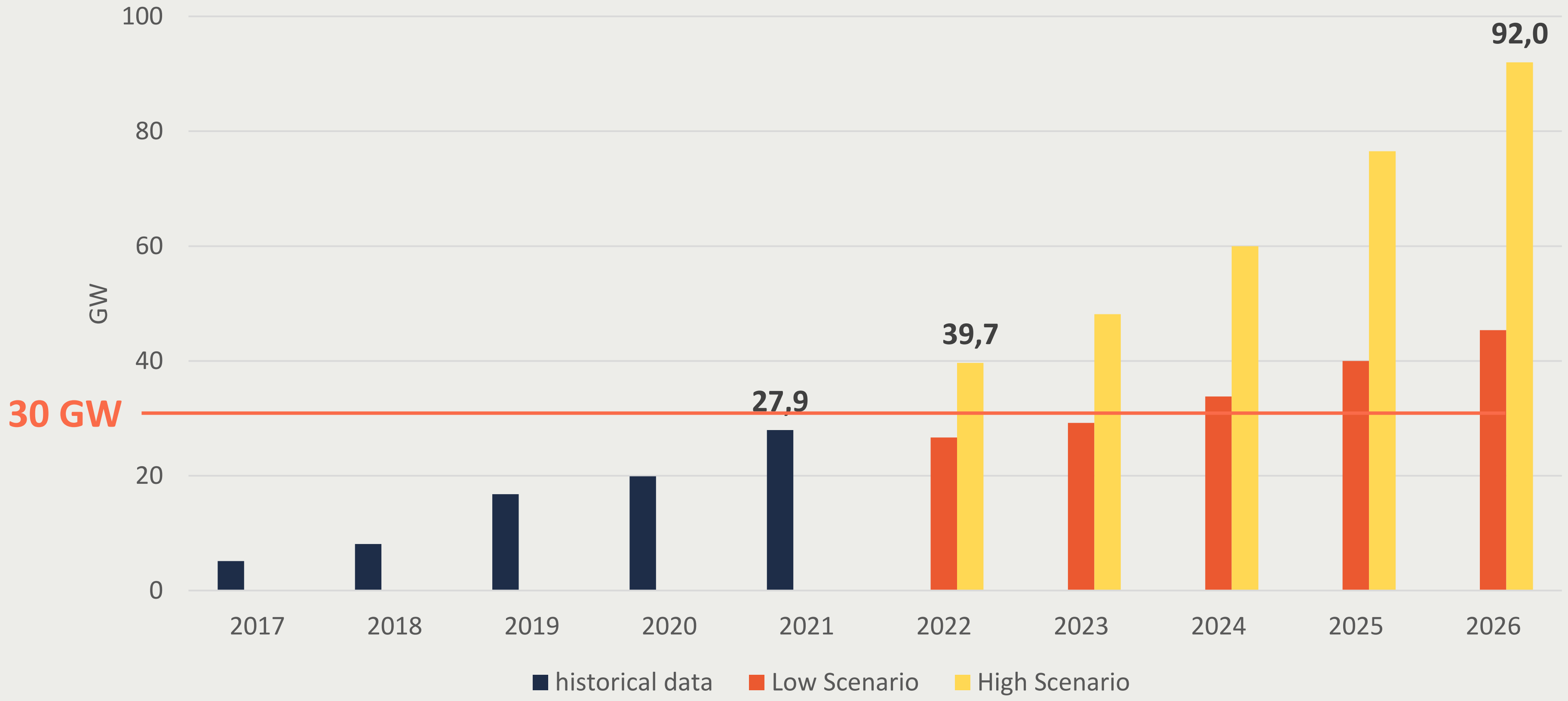
Though very ambitious from today's perspective, 30 GW production capacity would provide strategic resilience

Serving over 50% of EU market in 2025 in Medium Scenario



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The start of EU solar manufacturing renaissance?

Enel secures EU funds to scale up Italian heterojunction PV module factory to 3 GW

An unspecified sum is being provided by the European Union to help Enel become a large-scale PV panel manufacturer. The Italian company secured the funds through the Innovation Fund

NOVEMBER 17, 2021 EMILIANO BELLINI

HIGHLIGHTS MARKETS MODULES & UPSTREAM MANUFACTURING ITALY

Enel Green Power's factory in Catania.
Image: Enel Green Power

29.04.2022 - CORPORATE

Meyer Burger is developing additional production capacity for solar modules in Germany, thereby optimizing the expansion to 1.4 gigawatts for 2023

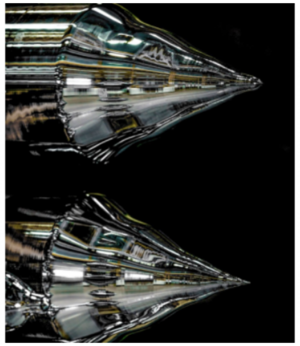
NEWS

REC Solar wins EU grant to build 2GW HJT plant in France

By Jonathan Tourino Jacobo
July 13, 2022

Financial & Legal, Manufacturing, Modules

Europe



Strategic Collaboration For Over 4 GW European Ingots Production By 2025

European Union's EIT InnoEnergy Invests In Norwegian Crystals To Support European Upstream PV Manufacturing

Wednesday, 07 Sep 2022

Norwegian Crystals (NCR) has secured a strategic investment from a European Union (EU) body EIT InnoEnergy that's aimed at accelerating European silicon ingots production from the company's site at Glomfjord in Northern Norway.

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Identifying right key support tools for EU PV Manufacturing

European Commission

INNOVATION FUND

Driving clean innovative technologies towards the market

Funding Demo Projects for innovative low-carbon technologies

- Two large-scale calls (>€7.5 mn projects) closed with solar being awarded 1 project in each call (Enel, REC

European Commission

Important Projects of Common European Interest (IPCEI)

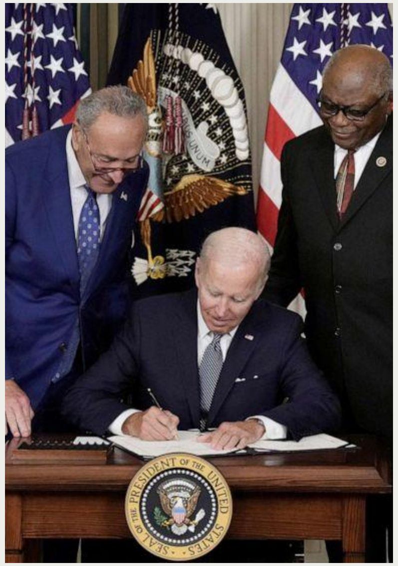
Support scheme providing exemption to European State-Aid rules

Learning from others?

India's Production Linked Incentive Scheme

- 10 GW Module production (3 Bio Eur support)
- 65 GW silicon-to-module projects
- Basic custom duty (25% cell imports, 40% modules)

Support worth 3 bio Eur

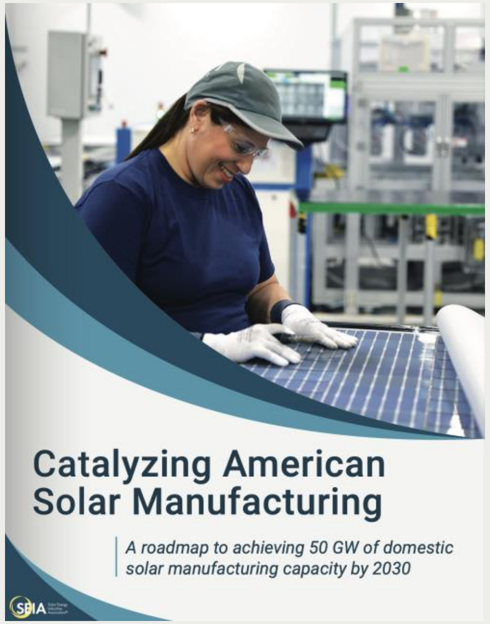


US Inflation Reduction Act

- Production tax credit available on all segments of the value chain and calculated on a USD/Wp basis
- Additional financing support for manufacturing
- Additional tax credit (30% + 10%) at installation step for bids with domestic content (100% iron and steel, 40% increasing for manufacturing goods)

$369 billion total support

IRA creating rapidly solar manufacturing momentum in USA



First Solar Reveals 4th US Solar Manufacturing Facility

Thin Film Panel Maker First Solar To Build New 3.5 GW Factory In Southeast US; May Plan Further Expansions

Aug 30, 2022

Solar Wafer Production In US Soon

SPI Energy Intends To Set Up 1.5 GW Solar Wafer Manufacturing Capacity In 2023 In USA

Friday, 26 Aug 2022

As per the US Department of Energy (DOE), there has been no production of solar wafers in the country since 2016, but it could change soon as SPI Energy has signed a letter of intent to secure solar wafer manufacturing equipment for 1.5 GW capacity, and increase it to 3 GW by 2024.

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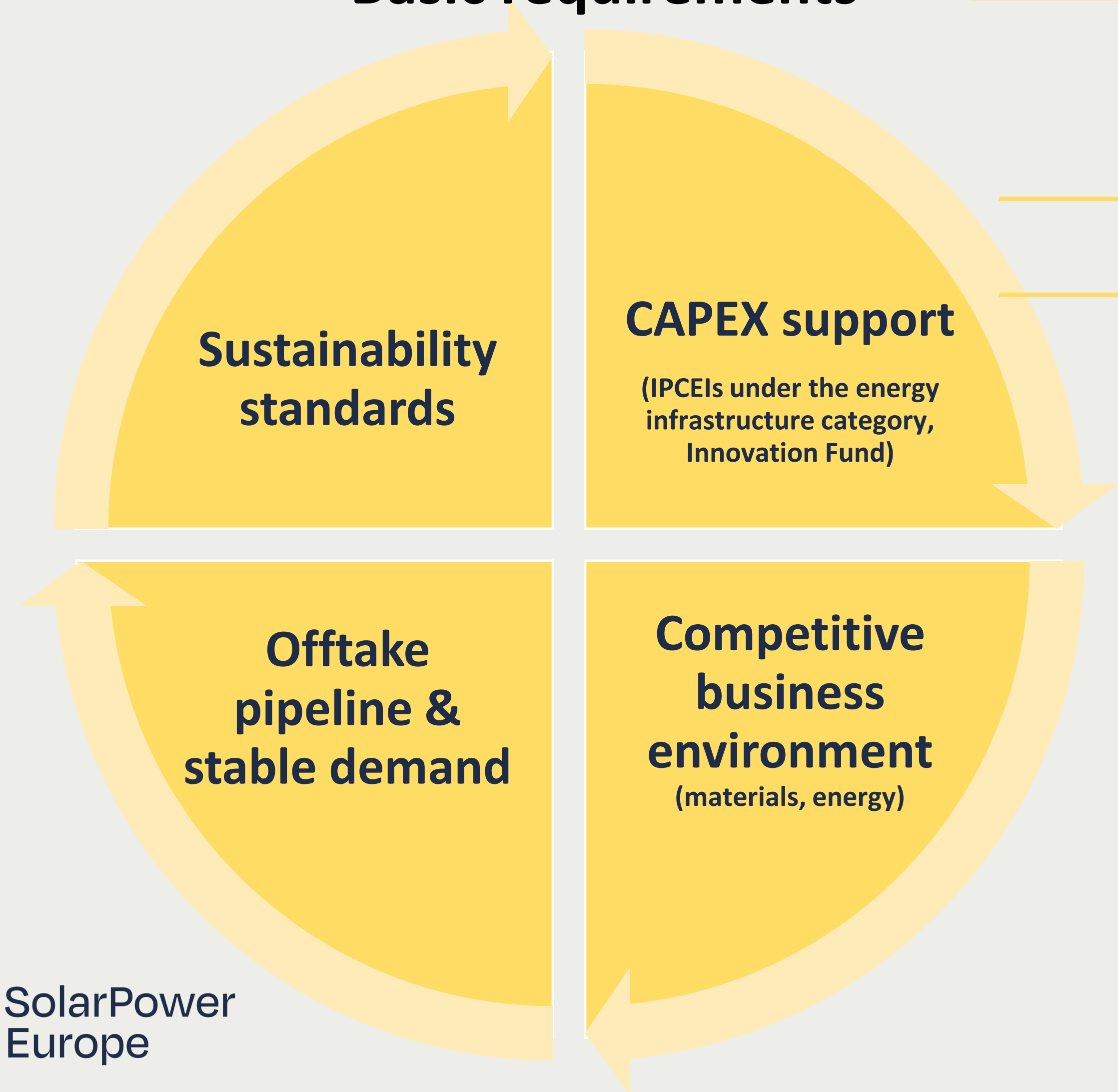
EU PV Industry Alliance – make it a success!

Basic requirements → **Acceleration**



→ Deliver a true **solar PV industrial strategy**

→ Come up **short-term** with a dedicated solar PV **manufacturing support scheme inspired by EU Chips Act,** flanked by competitive OpEx support for the entire supply chain, in particular the energy-intensive production of polysilicon and ingots/wafers

Thank you!

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