



Photo: VOLTEC SOLAR

ESMC'S QUARTERLY RECAP

The fourth and final quarter of the year proved to be the most eventful. In this communication, we look back and reflect on the organization's activities from October-December 2022.

The European Commission acknowledged the imminent threat that the Inflation Reduction Act (IRA) constitutes to the European clean tech sector. From an initially critical attitude to Biden's act, the Commission started to seriously consider the possibility of temporarily lifting the state aid rules for these strategic industries. This was shared publicly by President of the European Commission Ursula von der Leyen in a speech the December 4th, in which she addressed the topics of Europe's competitiveness in a new context and accelerating the clean transition with a strong industrial base. She opened for the opportunity to take a fresh look at how the EU supports whole value chains, down to mass production, of the most strategic green-tech solutions and clean end-products.

December's highlight was the launch conference for the European Solar PV Industry Alliance (ESIA) and we proudly saw our members actively getting involved by attending the event and signing the joint statement of the Alliance. ESMC will manage your trust as part of the ESIA Steering Committee, and by that work to improve the conditions for companies and organisations that are part of the European PV manufacturing industry.

ESMC's backbone proposals for the ESIA have been handed to the Commission as a result of a thorough internal process of collecting your priorities amongst several measures and policies. The ESMC will based on your will advocate for a combination of concrete policies to promote European-made products and their low carbon footprint, the avoidance of forced labor and short transportation ways, a dedicated financial vehicle and tax breaks. Until the AGM this spring, these points will as well function as internal guidance on how to align and prioritize our work.

In addition, we are happy to announce that the organization continues to grow. We see the fact that we are able to welcome new members at the current rate as a receipt of how actualized the issue of European PV manufacturing has become.

Dr. Johan Lindahl
Secretary General

To strengthen our inter-organizational communication, we have introduced a quarterly Recap, in which we summarize ESMC's activities, any important updates from our members, and information about any upcoming events.

Please, see this communiqué as an invitation to interact with ESMC team and board and influence our further work. If you have any additions to the recap or if you want an invitation to any of our Working Groups, feel free to contact our Secretary General Dr. Johan Lindahl:
lindahl@esmc.solar

FOLLOW ALONG WITH US



“Our state aid frameworks exist to preserve our precious Single Market. But if investments in strategic sectors leak away from Europe, this would only undermine the Single Market. And that is why we are now reflecting on how to simplify and adapt our state aid rules”

President of the European Commission Ursula von der Leyen
December 4, 2022

Third Innovation Fund Large-Scale Call

November 3rd marked the launch of the [third large-scale call of the EU Innovation fund](#). Pushed by us, and in the end to our great delight, the call includes a dedicated window for “Large Scale Projects – Clean-tech manufacturing” with a budget of € 700 million. The objective of this topic is to support innovative clean-tech manufacturing projects, focused on components for hydrogen production, renewable energy, and energy storage in order to build industrial capacity, technology leadership, supply chain resilience, and strategic autonomy on these decarbonization technologies. In collaboration with DG Clima, ESMC hosted a member-exclusive workshop and a Q & A - session on the topic. See the presented material [here](#).

ESMC backbone policy proposals

Timely before the launch of the ESIA, ESMC sent a [letter](#) to the European Commission with [eight key proposals](#) to create a competitive European PV manufacturing ecosystem as soon as possible. The key takeaways from the backbone proposals are that speed is of the essence in this fast-moving industry and that a holistic support approach is required for the framework to be impactful. The basis of these proposals was the questionnaire that was sent out to all ESMC members.

EU Solar PV Industry Alliance

“The new European Solar PV Industrial Alliance is a key initiative to decrease dependencies and boost EU manufacturing capacity of solar PV technologies to 30 Gigawatt annually by 2025 across the full value chain”

– **Thierry Breton**
Commissioner for Internal Market.

On December 9th, the [ESIA launch conference](#) was arranged in Brussels. At the event, the European Commission, the ESMC, and the rest of the ESIA Steering Committee presented the [Joint Statement](#) of the Alliance, setting immediate priorities for 2023. Together with many of the signatories from the European PV Industry, a united industry was displayed, sending a strong message to the Commission.

[APPLY FOR ESIA MEMBERSHIP](#)



BRUSSELS December 9th 2022. Group photo at the launch of the European Solar Photovoltaic Industry Alliance. Pictured amongst others: Commissioner for the Internal Market Thierry Breton, ESMC Secretary General Johan Lindahl and ESMC Policy Director Žygimantas Vaičiūnas.

Building a competitive solar-PV supply chain in Europe

December 13, 2022 | Report

MCKINSEY REPORT

– Can European businesses achieve a competitive position in the global solar-PV supply chain and strengthen Europe's energy transition and resilience? These topics are explored in McKinsey & Company's relevant [cost and policy analysis report](#), covering the European PV manufacturing Industry. ESMC and our members have served as a reference group in the preparation of the report. With China, USA and India as benchmarks, European PV manufacturers' competitive position in the global solar-PV supply chain is evaluated. One take-away from the report is that it is clear that ESMC's members are actively committed to bring PV manufacturing back to Europe. This is especially evident in the breakdown of the existing industrial landscape and project pipeline in Europe. [Read the report here.](#)

A SPECIAL WELCOME TO OUR NEW MEMBERS JOINING IN Q4 2022!

ENVELON
A Member of Grenzebach

 **FuturaSun**[®]

exateq
experience aided techniques

 **SYSTOVI**[®]

 **tubesolar**
ENERGY. NEXT LEVEL.

 **AGP**

RCT
solutions

NEW WORKING GROUPS

In light of the last months' developments, two new internal ESMC working groups have been formed. Representatives from all ESMC Member companies and organisations are welcome to join the groups and participate in the meetings. Notify your interest to join [here](#).

The groups are:

- WORKING GROUP ON INTEGRATED PV
- EUROPEAN SOLAR PV INDUSTRY ALLIANCE (ESIA) WORKING GROUP

pv magazine

WORDS FROM OUR POLICY DIRECTOR ŽYGIMANTAS VAIČIŪNAS

"If Europe is to come up with its own Inflation Reduction Act moment, and incentivize a return of EU solar manufacturing leadership, it must lift state-aid related restrictions on the PV manufacturers who have announced a willingness to build 30 GW of production lines." – these are the words of our Policy Director Zygimantas Vaičiūnas in his special in PV Magazine Global.

As written in the PV Magazine Special by our Policy Director Žygimantas Vaičiūnas, ESMC argues that the answer for EU is to take temporary, emergency action to help European solar manufacturing get onto its feet without abandoning, in the longer-term, the EU's core values. European companies stand ready to develop 30 GW of solar production capacity – along the supply chain – within three years, but only if the right conditions are put in place for finance, and help is provided with capital investment and operational costs. Manufacturers would also need to believe demand will exist for their products.



[READ THE PV MAGAZINE SPECIAL](#)

ESMC BOARD MEMBER PORTRAITS

- Get to know our Board Members in ESMC-exclusive interviews

In an effort to highlight our competent Board, we have introduced a series of portraits, where the [ESMC Board Directors](#) get the opportunity to share their insights of the current European Industry Development, their background, as well as to highlight the unique parts of their respective companies or organisations. In Q4, we had the pleasure to interview Stephan Abermann (AIT Austrian Institute of Technology) and Eicke Weber (MCPV).



**ABERMANN
STEPHAN**

Head of Competence
Unit Energy
Conversion &
Hydrogen

AIT Austrian Institute
of Technology

[READ THE ARTICLE](#)



**WEBER
EICKE**

Chairholder,
Co-founder
and Senior advisor

MCPV

[READ THE ARTICLE](#)

UPCOMING EVENTS

ESMC takes pride in recommending and collaborating with the most relevant conferences for our members. Find below two current conference collaboration partners, both with inspiring and interesting agendas.

ESMC GENERAL ASSEMBLY

On March 13, it is time for our annual General Assembly Meeting (GAM). To create travel synergies, we organize our GAM in connection to, and in collaboration with, the conference [PV CellTech 2023](#). Not only will we discuss and agree on strategies, budget, and membership fees for the next organizational year during this meeting, but it is also a great opportunity to meet each other. Considering that the organization currently has 54 members within the European PV manufacturing industry, ESMC itself now constitutes a rich industry network.

We, therefore, encourage you to attend the **GAM physically in Berlin on March 13th, 2023**. It will, however, also be possible to attend the meeting remotely. As always, a networking dinner will be held after the GAM, which is the evening before the PV CellTech 2023.

PV CELLTECH 2023

The PV CellTech 2023 is taking place in Berlin on March 14-15, 2023.

It is our pleasure to offer a €500 discount per person for the conference ticket for all members stating the code "[ESMC 1199](#)" when booking. The offer for €1199/ticket includes the two-day Berlin conference, buffet lunches, refreshments and drinks reception, speaker presentation as PDFs (subject to speaker approvals), money-back guarantee for COVID-19 disruption, and streamed video and session recordings. More information will be distributed continuously through [LinkedIn](#).



CLICK HERE TO SAVE THE DATE:
[ESMC GENERAL ASSEMBLY](#)

EU PVSEC

ESMC has had a fruitful collaboration with EU PVSEC for years, and 2023 is no exception. The EU PVSEC is the largest scientific Conference on PV Solar Energy in Europe and at the same time, it is a state-of-the-art PV Exhibition, where specialized PV Industry partners present technologies, innovations and new concepts in the upstream PV sector. PV Manufacturing is experiencing a revival in Europe and this spirit was felt with an increasing number of exhibitors and a sold-out exhibition hall in 2022.



We are happy to offer all ESMC members a 10% discounted price¹ when booking a conference booth. See the [Exhibition & Sponsorship Brochure](#) for more information.

[GO TO EU PVSEC EVENT PAGE](#)

¹ Cannot be combined with other discounts

OFFICIAL MEETINGS IN Q4

Date	Contact	Title	Topic
12 Oct	Dietmar Gründig Dirk von der Hude	DENA Coordinator, Stilpe Process BMWK Coordinator, Stilpe Process	Stilpe cross-section meeting on financing
11 Nov	Kerstin Jorna	Director General, DG GROW	Presentation of a PV manufacturing production cost benchmark study
21 Nov	Kurt Vandenberghe Daniel Gerber Matija Matokovic Ignacio Asenjo Eszter Batta Demos Spatharis	Member of the Cabinet, President U- von der Leyen Policy Officer, GROW.I.3, DG GROW Policy Officer, GROW.I.3, DG GROW Policy Officer, ENER.C.1 DG ENERGY Policy Assistant, Cabinet of the Commissioner Thierry Breton Head of Unit, COMP.H.2, DG COMP	Presentation of ESMC milestone proposals for the European Solar PV Industry Alliance; Investigation of General Block Exemption Regulation opportunities for PV-IPCEI projects
23 Nov	Stefanie Sifft Marek Schaller	Director at Saxony Liaison Office Brussels Desk Officer Energy, Climate Protection, Environment and Agriculture at Saxony Liaison Office Brussels	Coordinating regional effort for PV manufacturing
6 Dec	Maive Rute Jacek Truszczynski Matija Matokovic Daniel Gerber Ignacio Asenjo	Deputy Director-General, DG GROW Deputy Head ,GROW.I.3, DG GROW Policy Officer, GROW.I.3, DG GROW Policy Officer, GROW.I.3, DG GROW Policy Officer, ENER.C.1, DG ENERGY	Endorsment of the official goals of ESIA
9 Dec	Thierry Breton	EU Commissioner for the Internal Market	Industrial and Member States' views on opportunities and challenges along the value-chain

OFFICIAL PRESENTATIONS IN Q4

Date	Conference	Organiser	ESMC Representative
27 Oct	Solar power for a more democratic access to power	European Union IRENA	Žygimantas Vaičiūnas
3 Nov	5th International workshop on Silicon Heterojunction solar	INES	Johan Lindahl
10 Nov	3rd International Conference On Optics, Photonics, and Lasers"	USG-United Scientific Group	Eicke R. Weber
21 Nov	Q&A stakeholder session with European Commission Executive Vice-Presidents ahead of third TTC Ministerial	European Commission	Žygimantas Vaičiūnas
21 Nov	Supporting the Next IPCEI European Champions in Solar Industry	Official Spanish Chamber of Commerce in Belgium and Luxembourg	Žygimantas Vaičiūnas
9 Dec	Panel discussion: Scale up challenges for manufacturing of solar PV in Europe	European Solar PV Industry Alliance (ESIA)	Carsten Rohr Lucas Weiss Stefan Rinck Peter Fath Marc Rechter Johan Lindahl