

# Q2 2022- Q1 2023 ACTIVITY CATALOGUE



The European Solar Manufacturing Council (ESMC) is the organisation representing the interests of the European PV manufacturing industry. The Council relies on key industrial companies, organisations and research centers active in the PV sector rooted in Europe. ESMC aims at promoting and supporting the PV manufacturing industry and its value chain at the European level.

## WORDS FROM THE SECRETARY GENERAL

ESMC has grown significantly during 2022, welcoming our 57th member to the organization at our last Board meeting for the organizational year (Q2 2022 – Q1 2023). Simultaneously, the issue of European PV manufacturing has become increasingly actualized. In preparation of the General Assembly Meeting in March, this report lists ESMC's activities and achievements over the past year, both focused on our advocacy work and the deliverables in our working groups. In addition, the official meetings are listed as well as ESMC's conference participation during the year.

The introduction of extensive national support measures overseas, the invasion of Ukraine, reports of forced labor in China, and remaining turmoil from the worldwide pandemic are all factors shaking both Global and European PV industries. Consequently, we see an energy crisis occurring in Europe with Member States setting modern records for high energy prices. The European Commission hopes to curb the situation by breaking dependence on Russia and deploying large amounts of renewable power in the short term. This is dealt with in the comprehensive conversion package REPowerEU, which as a part includes the EU Solar Energy Strategy. At the same time, there have been reports of disruptions in the global value chain and high material prices throughout the year, and both the market and the industry in Europe have had difficulty getting access to hardware at the right time, and not to be neglected, at the right price. This has shed light on ESMC core mission, to diversify the global hyper-concentration of PV manufacturing. In both India and the US, we see extensive support packages to stimulate domestic manufacturing of our technology, which is a key strategy for the green transition.

Unfortunately, the EU is lagging behind and is just now realizing the cruciality of having a strong local industrial PV value chain. This has resulted in a reality, where actions developed in 2023 will be detrimental to the willingness of investors to invest in European PV manufacturing. A strong and holistic approach to the support of the industry is essential. Tax breaks, exemptions from the state aid rules and a guaranteed uptake of the products are, in short, what needs to be in place as soon as possible to create a level playing field for our members.

On the positive side, the European Commission is including directed support measures in the Green Deal Industrial Plan for the Net-Zero Act, and the European Solar Industry Alliance (ESIA) has taken off effectively with the formation of several relevant working groups. We see, and make sure, that these topics being discussed at the highest political level at the special European Council, which can be seen as nothing else than acknowledgment of the strategic importance of Europe's clean-tech industries.

As another receipt of what a pivotal year it has been for the industry and the organization, ESMC has grown by 66% compared to the same time last year, welcoming 23 new members to ESMC. For the second full year as Secretary-General, I thank all of you for the confidence in me and my secretariat team to represent you in the continuous dialogue with Europe's political and industrial stakeholders.



**Dr. Johan Lindahl**  
Secretary General

FOLLOW ALONG WITH US



# ESMC SECRETARIAT



**Johan Lindahl**  
Secretary General  
lindahl@esmc.solar

**Core responsibilities:**

Johan provides strategic leadership for the secretariat, represents the organisation externally, is the first point of contact to ESMC Members and industry stakeholders, and reports to the Board of Directors.



**Žygimantas Vaičiūnas**  
Policy Director  
vaiciunas@esmc.solar

**Core responsibilities:**

Žygimantas has an executive role as responsible for ESMC's overall policy portfolio with a special focus on relationships with the European Commission and financial policies. He also manages the PV-IPCEI.



**Jens Holm**  
Sustainability Policy Director  
holm@esmc.solar

**Core responsibilities:**

Jens is responsible for the sustainability policies, he is newly appointed and in charge of defining ESMC's further work on EcoDesign, Energy Labelling, the Carbon Border Adjustment Mechanism (CBAM) and Forced Labour Regulations.



**Amelia Oller Westerberg**  
Market Analyst & Communications  
westerberg@esmc.solar

**Core responsibilities:**

Amelia performs communication and market analysis, especially the data analysis of dominant PV trade flows in Europe, the management of the BIPV Working Group and ESMC's social media channels and website.

# BOARD OF DIRECTORS 2022/2023



CO-CHAIR  
**EICKE WEBER**  
MCPV



CO-CHAIR  
**GAËTAN MASSON**  
BECQUEREL INSTITUTE



CO-CHAIR  
**CARSTEN ROHR**  
NORSUN



VICE-CHAIR  
**VINCENT BÈS**  
PHOTOWATT



BOARD DIRECTOR  
**ANIS JOUINI**  
INES



BOARD DIRECTOR  
**KATHRIN THEELEN**  
EVOLAR



BOARD DIRECTOR  
**RADOVAN KOPECEK**  
ISC KONSTANZ



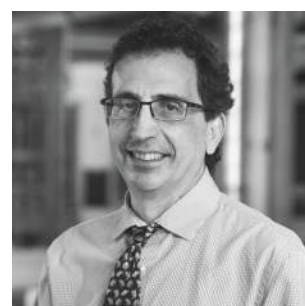
BOARD DIRECTOR  
**STEPHAN ABERMANN**  
AIT



BOARD DIRECTOR  
**LUCAS WEISS**  
VOLTEC SOLAR



BOARD DIRECTOR  
**DAVOR SUTIJA**  
NEXWAFE



BOARD DIRECTOR  
**CHRIS CASE**  
OXFORD PV



BOARD DIRECTOR  
**ANDREAS BETT**  
FRAUNHOFER ISE



BOARD DIRECTOR  
**RICHARD MORETH**  
VITRONIC



BOARD DIRECTOR  
**TORGEIR ULSET**  
REC



BOARD DIRECTOR  
**STEFAN RINCK**  
SINGULUS

# ESMC MEMBERS





# EU SOLAR PV INDUSTRY ALLIANCE

The EU Solar Energy Strategy, which formation ESMC strongly advocated for, included the creation of the EU Solar PV Industry Alliance (ESIA). This consortium aims at bringing together industrial actors, research institutes, consumer associations and other stakeholders with an interest in the solar PV sector, including the emerging circularity industry. It aims to build resilience and strategic autonomy for Europe's Solar PV value chain. The work will be focused on identifying and coordinating investment opportunities, project pipelines and technology portfolios and establish pathways for the solar industrial ecosystem in Europe.

As the organization representing the upstream part of the PV Industry, ESMC is part of its Steering Committee, along with the European Commission, InnoEnergy and SolarPower Europe. Timely before its launch, ESMC proposed guiding principles for the ESIA as well as a summary of the issues to be addressed without delay to ensure fast deployment of European PV manufacturing capacities along the full value chain and across the whole EU. In this Alliance, ESMC especially focuses on getting the message across that while foreign schemes like the IRA are well-designed support systems, they constitute high risks for the longevity and development of the European PV Industry if not met with appropriate actions.

ESMC is the 'Sherpa'-leader of the project group on EU Regulations and incentives for Supply Chain, Materials & Equipment development (WG2) and will as well have representatives in all the remaining three groups; WG1 Non-pricing conditions (Demand Side Policies), WG3 Financing and WG4 Skills.



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.

## ESIA WORKING GROUP

Additionally, ESMC has issued an internal working group on ESIA-topics. It offers monthly updates about the ESIA work and discussions on critical topics. As the case with all ESMC Working Groups, 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](#).

# EU SOLAR PV INDUSTRY ALLIANCE

13 June 2022

## Framework proposals for the EU Solar PV Industry Alliance

European Solar Manufacturing Council (ESMC) expresses strong support for the proposed EU Solar PV Industry Alliance in the recently adopted EU Solar Energy Strategy. We would like to stress the need for the Solar PV Industry Alliance to start the work towards establishing a concrete support program for PV manufacturing industry as soon as possible, preferably so that the implementation guidelines of the Alliance already are set in 2022. The measures investigated and taken should ensure fast European PV manufacturing capacity deployment along the full value chain and across the whole EU where viable. For the effective kick-off of the Alliance, we are proposing some guiding principles and the issues to be addressed without delay.

### I. GUIDING PRINCIPLES

Transparency, involvement of as big part of the European PV manufacturing industry as possible, effective management structure, fast actions supporting the PV manufacturing industry and de-risking investments should be absolute priorities of the Alliance, which are in line with the mandate of the EU Solar Energy Strategy. A proper governance framework should ensure the balanced functioning of the Alliance and avoid potential conflicts of interests.

### II. ISSUES TO BE ADDRESSED

- Mapping of existing and prospective European PV manufacturing capacities along the full value chain and identifying structural and financial factors influencing the developments
- Mapping of the existing and potential financial support instruments (ways and measures to de-risk the financing of the private investments) with a view to ensure the most effective and timely investments and addressing both – capital costs and operational costs.
- Creating the appropriate ecosystem and ensuring structural factors for a long term off-take demand for PV hardware manufactured domestically in the EU
- Promoting a policy framework that allows for for well as sets EU standards addressing CO<sub>2</sub> footprint the like to ensure a more level playing field and the EU level.
- Ensuring that mature manufacturing projects are for a timely implementation of projects, and avoid delays.
- Setting-up concrete long-term goals for PV markets

### III. GOALS TO BE ACHIEVED

- Risk of deployed or installed PV capacities should European PV production capacities in 2025 and 2030
- A special strategic financial vehicle to at least implement immediately in order to attract and scale-up of the EU PV manufacturing industry for the establishment of new PV manufacturers
- Regulatory, financial and other stimulating action full value chain in Europe (not less than 50% to be competing with the most advanced parts of the

European Commissioner for the Internal Market Thierry BRETON  
European Commissioner for Energy Kadri SIMSON



30 November 2022

Dear Commissioner BRETON,  
Dear Commissioner SIMSON,

### ESMC MILESTONE PROPOSALS FOR THE EU SOLAR PV INDUSTRY ALLIANCE

The European Solar Manufacturing Council (ESMC), uniting 30 members of the European PV manufacturing community, welcomes the constant efforts of the European Commission to support the creation of a long-term competitive European PV manufacturing landscape. We highly appreciate the European Commission's preparedness to address the strategic importance for Europe and our joint work in this direction during recent years.

The forthcoming launch of the European Solar PV Industry Alliance (Alliance) marks an important cornerstone in developing a competitive European PV manufacturing industry across the full PV value chain and securing the PV deployment in line with the ambitious targets declared in the EU Solar Energy Strategy. ESMC welcomes with high interest and appreciation the establishment of the Alliance and expects that this will be a decisive factor to create a long-term competitive ecosystem for the European PV manufacturers and the substantial European industrial suppliers. While implementing these goals, the ESMC strongly proposes the Alliance to complement the 30 GW European PV manufacturing target for 2025 by at least an 80 GW manufacturing target for 2030.

It is absolutely clear that the success and the deliverables of the Alliance will depend on fast, concrete, mature and comprehensive support measures to ensure the global competitiveness of the European PV manufacturing industry. On a global scale, the European PV manufacturing industry currently is almost non-existing, due to fierce competition and an uneven playing field. Currently, the possibilities for European PV manufacturers to attract investments are challenging, and support measures from other potential global circumstances, the incentives and support schemes, historical opportunity for Europe to play a role in the effect of the incentives for the European PV ecosystem possible to non-EU manufacturers, so that the open chain will be competitive globally. Now there is a scale-up of the European PV manufacturing capacity European PV industry.

By this letter and the enclosed 8 concrete proposals a general guideline for the Alliance to take the following to the creation of a € 20 billion special for effective off-take agreements for local production or subsidization, CO<sub>2</sub> footprint and circularity.

ESMC is prepared to spare no efforts and dedicate it as well as of our individual members to take the concrete positive changes of the European PV manufacturing

ENCLOSURE: European Solar Manufacturing Council Industry Alliance IS pages.

On behalf of the European Solar Manufacturing Council

Co-Chair Eicke Weber, Co-Chair Galstan Masson, Co-Chair Carster

JUNE 2022

## FRAMEWORK PROPOSALS

ESMC highlights that the measures investigated and taken should ensure fast PV manufacturing capacity deployment along the full value chain and across the whole EU.

NOVEMBER 2022

## LETTER TO BRETON & SIMSON

ESMC send direct goal statements and policy proposals to Commissioner Thierry Breton and Commissioner Kadri Simson before the official high-level launch conference of the ESIA.

## EUROPEAN SOLAR MANUFACTURING COUNCIL (ESMC) MILESTONE PROPOSALS FOR THE EU SOLAR PV INDUSTRY ALLIANCE

### SUMMARY

The EU needs a holistic industrial policy approach – an entire package of support measures targeting different important areas. For this reason, different support layers should be developed addressing the current bottlenecks to facilitate a well-functioning European PV manufacturing ecosystem. The EU PV manufacturing industry critically needs these key measures to be adopted by the European Solar PV Industry Alliance:

1. **EQUALIZED CONDITIONS TO IRA:** The US Inflation Reduction Act (IRA) framework should be transposed into an EU PV manufacturing support framework, to ensure strong European response. The equalizing measures could be implemented in two alternative directions: a) through implementation of a tax incentive model; b) by direct grants to manufacturing projects.
2. **TAX EXEMPTIONS, STATE GUARANTEES, CAPEX AND OPEX SUBSIDIES:** An access to low interest capital and OPEX subsidies to support (venture) capital investments (for risk mitigation) to foster investment into production facilities. Concrete mechanisms on lowering equalizing the price for energy (for example, electricity and natural gas) should be developed – competitive and plausible energy prices are particularly critical for the production poly-Si solar glass, wafers, etc.
3. **OFF-TAKE AGREEMENTS:** Securing significant demand for EU-made PV products through off-take agreements, including pre-payments for local production. This measure would catalyze investments in large-scale PV manufacturing capacities in Europe. An effective insurance system should be created both for the buyers (in case of non-off take) and producers (in case of non-delivery) for the situations when the agreements can't be entirely fulfilled.
4. **EU STANDARDS:** EU standards for imported PV (eggs, wafers, hidden subsidies, carbon footprint, and circularity any component of the imported product do not meet EU standards).
5. **SUPPORT FOR INNOVATIONS:** The establishment of an ap European technologies is critical for the European PV market should pursue the support for the development and further impact for the EU strategic autonomy and PV manufacturing
6. **SPECIAL FINANCIAL VEHICLE:** Creating and developing following the example of the European Chip Act, and allow mechanisms, e.g. National Recovery and Resilience Plans.
7. **PERMITTING PROCEDURES:** Reduce the red tape for pv construction of industrial PV manufacturing plants. Easy access will save time – a critical element in the current global competition.
8. **EU REGULATIONS:** Adoption of policy measures to specify integrated PV solutions would have a cumulative positive impact.

All these measures should be implemented not separately, but ensure both short-term and long-term competitiveness of E to be taken to ensure 30 GW PV manufacturing capacities as ambition to raise the target to 80 GW PV manufacturing capacity demand side.



NOVEMBER 2022

## BACKBONE PROPOSALS

ESMC states that EU needs a holistic policy approach and provides an entire package of support measure proposals, and also addresses bottlenecks to facilitate a well-functioning and balanced European PV industry.



## High level launch conference of the European Solar PV Industry Alliance Joint statement

The European Solar PV Industry Alliance, a pillar of the EU Solar Energy Strategy, aims to re-develop the photovoltaics (PV) industry in Europe across all segments of the value chain, and to create its competitive position in the context of booming demand for solar PV in Europe and globally.

On the occasion of the launch of the European Solar PV Industry Alliance on 6 December 2022 and beyond, particularly in view of setting out the priorities for 2023, we the undersigned:

1. Agree with the objectives, principles and working mechanisms set out in the Alliance Declaration;
2. Agree with the objective of the European Solar PV Alliance to reach 30 GW of certified European manufacturing capacity by 2025, across all the value chain segments (Polysilicon, Ingress, Wafers, Cells, Modules, Components);
3. Note that reaching the objective would deliver 60 bn Euros of new GDP per year in Europe and the creation of more than 400,000 new jobs (direct and indirect);
4. Recall that companies in the European solar PV value chain have already committed to investments that will increase the current European capacities, confirming investors' appetite for solar PV assets;
5. Remind that existing projects, as well as capacity collaborations or new companies to be created, require supportive conditions that would ensure the attractiveness of Europe as an investment destination;
6. Will work jointly, as members of the Alliance to develop and implement the Alliance's Strategic Action Plan, to accelerate and de-risk investment decisions across the EU Solar PV industrial value chain;
7. Will actively contribute to the Alliance's efforts, with the following priorities in 2023:
  - a. Mobilising public and private finance for European solar PV manufacturing projects to scale up capacity, making best use of all existing and new European financing instruments, notably the Innovation Fund (next technology manufacturing window in the current large-scale call, the REPowerEU chapter in the national recovery and resilience plans, the EBF contribution to expanding the EU's clean energy technology manufacturing capacity in the context of REPowerEU).
  - b. Ensuring a sustainable level playing field and stimulating demand for competitive, efficient and sustainable PV products and systems.
  - c. Working on the multi implementation of modernisation requirements for PV systems and products and on public procurement actions.
  - d. Anticipating the skills requirements of this new industry with the start of the European Solar PV Industry Alliance Academy.
  - e. Identifying the research and innovation gap for creating a European pipeline of innovative and competitive solar PV solutions and systems.
  - f. Maintaining inter-national partnerships and resilient global supply chains.

DECEMBER 2022

## ESIA JOINT STATEMENT

Before the launch of ESIA, the Steering Committee and members undersigned a joint statement of goals and principles, including a PV manufacturing capacity target of 30 GW until 2025.

See also the Alliance registration form

# IMPORTANT PROJECTS OF COMMON EUROPEAN INTEREST - THE IPCEI FOR PV MANUFACTURING

The Treaty on the Functioning of the European Union open the possibility of approving state aid for 'Important Projects of Common European Interest' (IPCEI). IPCEIs allow European Member States to jointly support transnational cooperation projects with major synergies that make an important contribution to economic growth, jobs and the competitiveness of the EU industry and economy.

One of ESMC's main goals is to create an IPCEI for PV manufacturing. ESMC initiated a process and a working group in the spring of 2021, in collaboration with the European Solar Initiative. Since mid-2021, the IPCEI consortia attracted over 60 European companies and research organizations, all actively engaged in forming an IPCEI for PV manufacturing under the lead of ESMC. The possibilities to join already formed projects or to propose new projects based on innovative PV technologies are still open.

In 2022, the work has been focused on the Project Groups and the projects have matured to a level that allows for some to initiate the preparatory work for the pre-notification. This process is coordinated and supported by european economics (consulting firm speciliasing in EU-project finance).

Additionally, the support from the European Commission has also been cemented and to our pleasure, clearly expressed in several official communications from the European Commission. In May 2022, ESMC hosted a launch conference in Brussels in proximity to the launch of the EU Solar Strategy. ESMC is also actively advocating for easier permitting processes and rules for state aid support, amongst them facilitated IPCEI-processes.

Project title	Confirmed partners
Industrializing heterojunction cell and module technology to the gigawatt scale	
Manufacturing of TOPCon PV cells and silver paste	
Industrializing Tandem PV technology to the Gigawatt scale	
PV integrated solutions	
Circular PV production	
Industrializing IBC solar cell and module technology to Gigawatt scale	

# ECODESIGN AND ENERGY LABELLING

The European Commission is considering introducing environmental policies for PV and other markets, ESMC promotes a specific position aiming at mandatory policies rather than voluntary schemes, with a preference for a strong EcoDesign scheme. The inclusion of CO<sub>2</sub>-footprint, in addition to other environmental requirements, is a key success for ESMC, and we actively follow the development, both in an internal working group and in collaboration with partner organizations.

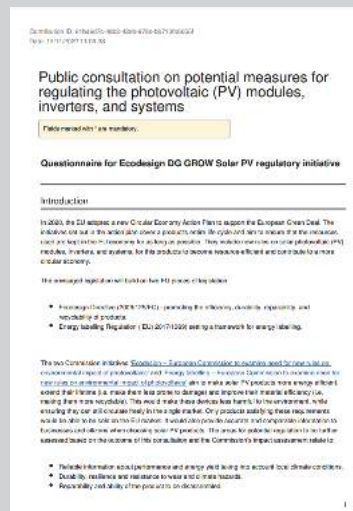
Following the JRC preparatory study, ESMC initiated a Joint Mission Group under ETIP-PV to join forces with Solar Power Europe, PV Thin and IECRE (IEC System for Certification to Standards Relating to Equipment for Use in Renewable Energy Applications) to engage in the policy development process and provide expert input.

In 2022, the process has reached a step of internal processes in the European Commission and ESMC have actively, both on our own and in different constellations, submitted feedback in all possible regulatory steps, as well as participated in the high-level stakeholder meeting.

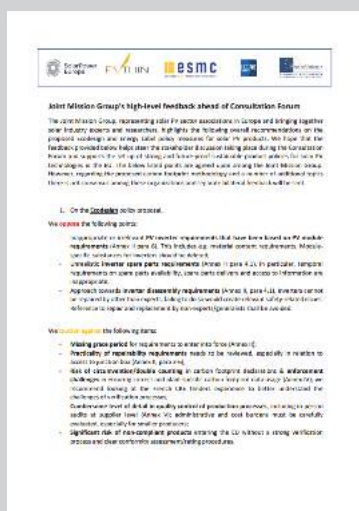
**DEC 2022**  
Signed letter for harmonised green public procurement rules for solar PV products



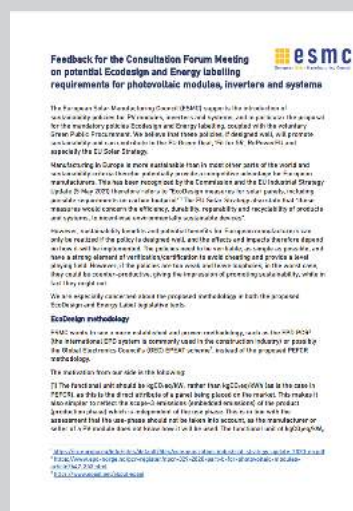
**NOV 2022**  
ESMC Questionnaire Answers – Public consultation EcoDesign initiative by DG GROW



**JUNE 2022**  
Joint Mission Group's high-level feedback ahead of Consultation Forum.



**JUNE 2022**  
Feedback for the Consultation Forum Meeting: EcoDesign and Energy Labelling requirements.



## GREEN DEAL INDUSTRIAL PLAN

In February 2023, the Commission presented a Green Deal Industrial Plan to enhance the competitiveness of Europe's net-zero industry and support the fast transition to climate neutrality. The Plan aims to provide a more supportive environment for the scaling up of the EU's manufacturing capacity for the net-zero technologies and products required to meet Europe's ambitious climate targets.

The Plan builds on previous initiatives and relies on the strengths of the EU Single Market, complementing ongoing efforts under the European Green Deal and REPowerEU. It is based on four pillars:

- 1) A predictable and simplified regulatory environment
- 2) Speeding up access to finance
- 3) Enhancing skills
- 4) Open trade for resilient supply chains.

ESMC has provided input to the European Commission and has **openly communicated** an expectation for PV manufacturing to be prioritized among these strategic sectors, as well as in the upcoming legislative proposals of the European Commission

## NET-ZERO INDUSTRY ACT

The Commission has also proposed a Net-Zero Industry Act to identify goals for net-zero industrial capacity and provide a regulatory framework suited for its quick deployment, ensuring simplified and fast-track permitting, promoting European strategic projects, and developing standards to support the scale-up of technologies across the Single Market.

Central to ESMC, the Commission started consulting the Member States on an amended Temporary State aid Crisis and Transition Framework and revising the General Block Exemption Regulation in light of the Green Deal, increasing notification thresholds for support for green investments. Among others, this could contribute to further streamlining and simplifying the approval of IPCEI-projects.

In direct communication with the Commission, ESMC provided concrete proposals and arguments on how the act, and specifically state aid exemptions, could support the European PV Industry.



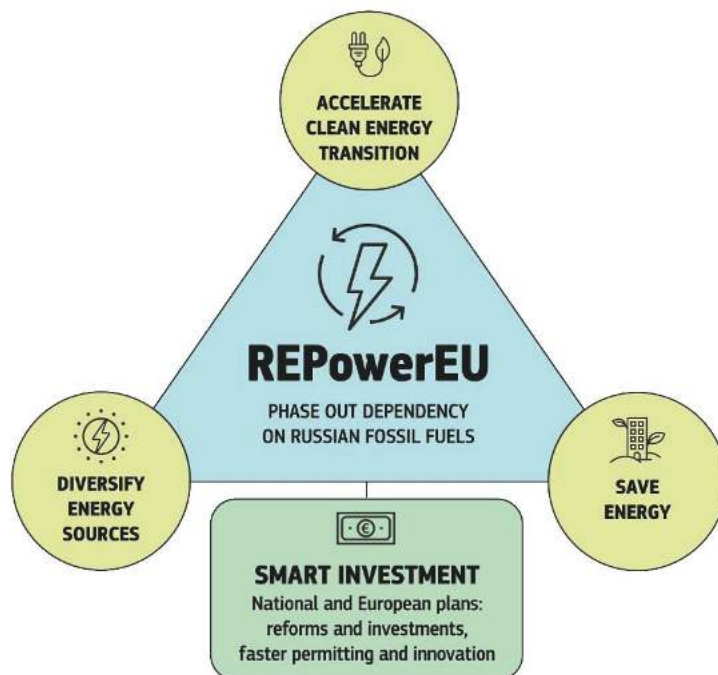
# RRF & REPOWEREU

The REPowerEU Plan is a response to the hardships and global energy market disruption caused by Russia's invasion of Ukraine. It was released on 18 May 2022. The background was the double urgency to transform Europe's energy system: 1) ending the EU's dependence on Russian fossil fuels, which are used as an economic and political weapon and cost European taxpayers nearly €100 billion per year and 2) tackling the climate crisis.

ESMC has followed the development of framing this support package, as well as the implementation in the Member States, as a continuation of the extensive RRF effort in 2021/2022. Amongst other communications with the Commission, ESMC released a statement in March, before the package was released, and requested quick and dedicated measures for the European solar PV manufacturing industry.

On 1 February 2023, the European Commission presented Guidance on Recovery and Resilience Plans in the context of REPowerEU and on 21 February adopted the communication Recovery and Resilience Facility: Two years on A unique instrument at the heart of the EU's green and digital transformation, in which the Commission strongly encourages EU Member States to include simple and effective measures to provide support to strategic net-zero industries in their REPowerEU chapters, and by that boost their competitiveness in the context of the net-zero industry transition. The amending regulation to the REPowerEU was adopted by the European Parliament on February 27.

In both official and direct communication to the Member States, ESMC has highlighted the critical momentum to use the available REPowerEU €20 billion financing through dedicated activities in the Member States' respective national Recovery and Resilience Plans (RRPs).



# INNOVATION FUND

As part of the REPowerEU Plan, the European Commission doubled the funding available for the 2022 Large Scale Call of the Innovation Fund to around EUR 3 billion. ESMC joined forces with several other Renewable Energy Associations to approve the evaluation procedure. Apart from the general call for proposals, pushed by ESMC, and in the end to the association's great delight, the call included a dedicated window for "Large Scale Projects — Clean-tech manufacturing" with a budget of € 700 million.

The objective of this dedicated window 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 also joined forces with several renewable energy associations in a letter, calling to rebalance the Innovation Fund to better include renewable energy.

## RENEWABLE ENERGY DIRECTIVE (REDIII)

The recast of the Renewable Energy Directive (REDIII) provides a unique scale-up opportunity for innovative renewable technology. ESMC has joined a coalition of industry and research actors in a call on the EU's indicative target aimed to ensure that at least 5 % of newly installed renewable power and heating and cooling capacity until 2030 shall be of innovative renewable energy technologies. A report on the same subject has been published.

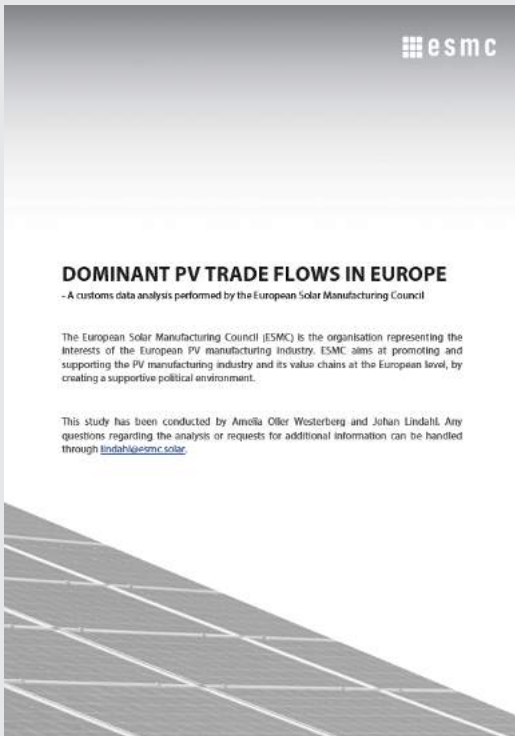


## FORCED LABOUR ISSUE ACKNOWLEDGEMENT IN THE EU

ESMC has previously [condemned](#) the situation of the Uighur minority in the Xinjiang province and the relation between reports of forced labour and the solar industry in China. Forced labour is absolutely deplorable, and any PV modules or components which may have been produced with forced labour should be banned from entering the European Union market. The EU has an extensive regulation on human rights, working environment rules and social standards, and import of any products not complying with these conditions undermines these EU rules and creates an unfair competition.

In the autumn of 2022, ESMC expressed appreciation for the actions of the European Bank for Reconstruction and Development (EBRD) to [request higher supply chain transparency](#), to be able to carry out thorough due diligence processes, so that Chinese Photovoltaic (PV) modules, using polysilicon that is suspected to be produced by forced labour, no longer will be eligible for EBRD funding.

# DOMINANT PV TRADE FLOWS IN EUROPE



In the yearly ESMC trade flow analysis, the most dominant trade flows of PV modules and cells are mapped out, as well as the monetary value of the trade. This analysis is based on customs data from the International Trade Centre (ITC).

As the disruption of supply and silicon shortage have been further actualized in recent years, the REPowerEU sets ambitious deployment targets.

Part of ESMC's mission is to communicate to the policymakers that while the regional market is growing, Europe is becoming more dependent on third-party countries.

## BIPV VALUE CHAIN MAPPING AND WORKING GROUP

In the autumn of 2022, ESMC started a project in collaboration with Chalmers University, Sweden, with the aim to map the European BIPV value chain. In light of the ESIA development, an ESMC Working Group has been formed to discuss and concretise the specific challenges and opportunities in that part of the European PV Industry.

## MCKINSEY REPORT

Can European businesses achieve a competitive position in the global solar-PV supply chain and strengthen Europe's energy transition, resilience and sovereignty?

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.](#)

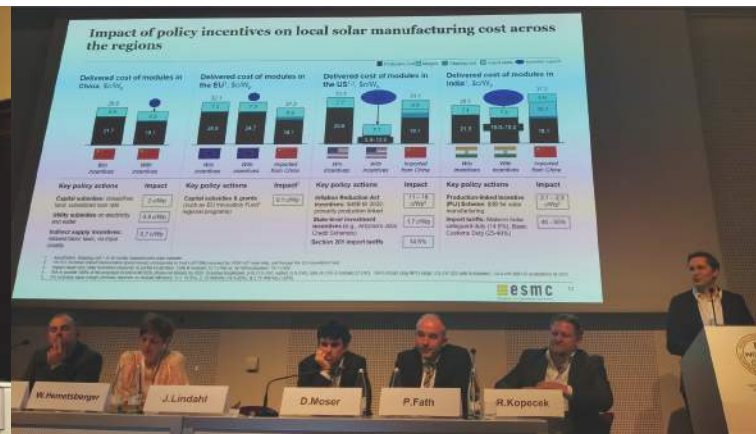


**Building a competitive solar-PV supply chain in Europe**

# OFFICIAL PRESENTATIONS SINCE THE LAST GENERAL ASSEMBLY MEETING

(Preliminary version: to be updated by the GAM)

Date	Conference	Organizer
6 Apr	Solar for Net-Zero	Clean Energy Ministerial Secretariat (CEM)
8 Apr	1st International Integrated PV Workshop	SERIS Singapore
4 May	Strengths of PV and ongoing initiatives	ETIP-PV
12 May	Meet the European PV Manufacturing industry	European Solar Initiative (at Intersolar)
20 May	PV-IPCEI launching event	ESMC
25 May	Lithuanian Davos 2022	Democracy Development Fund
28 Jun	Made in Europe: Bulking up, building out	PV Magazine
14 Jul	Next steps for Jiu Valley transition from coal	TRACER project
31 Aug	New Technologies in Solar Manufacturing	ISA Roundtable - Africa
15 Sep	Policy Actions for the PV manufacturing in Europe	Solitek
21 Sep	German-Spanish Solar Initiative	Cámara de Comercio Alemana para España
26 Sep	European Sustainable Energy Week	European Commission
26 Sep	Industry summit	WCPEC
27 Sep	NB8 Forum III „Energy	Honorary Consuls of NB8
27 Oct	PV -for a more democratic access to power	European Union, IRENA
3 Nov	5th International workshop on Silicon HJT	INES
10 Nov	3rd Conference On Optics, Photonics, and Lasers	USG-United Scientific Group
21 Nov	Q&A stakeholder session	European Commission
21 Nov	Supporting the Next IPCEI	Official Spanish Chamber of Commerce
9 Dec	Scale up challenges for PV Industry in Europe	European Solar PV Industry Alliance
26 Jan	Solar Talk on preliminary position paper	Saxony Liaison Office Brussels



**Left:** PV-IPCEI Event, May 20th, Walburga Hemetsberger (SolarPower Europe), Žygimantas Vaičiūnas (ESMC), Kadri Simson (European Commission) & Eicke Weber (ESMC), **Right:** ESMC Secretary General Johan Lindahl (right) at the Industry Summit at the 8th World Conference on Photovoltaic Energy Conversion, Milano.,

# OFFICIAL MEETINGS SINCE THE LAST GENERAL ASSEMBLY MEETING

(Preliminary version: to be updated by the GAM)

Date	Meeting participant
20 Apr	Philippe Malbranche, Programme Director of International Solar Alliance
14 Jun	Maurizi Massimiliano, Responsible for Logistics and Energy at Invitalia Cristina Ottaiano, Renewable Energy Specialist at Invitalia Parrinello Donato, High-tech FDI Specialist at Invitalia Robbe Lorenzo, Project Manager - International companies and investors at Invitalia
27 Jun	Davide Polverini, Policy Officer at DG Grow, European Commission
21 Jul	Dietmar Gründig, DENA Coordinator, Stilpe Process Dirk von der Hude, BMWK Coordinator, Stilpe Process
25 Jul	DG for Enterprise, Ministry of Economy and Finance
7 Sep	Consortium of Europe's RES Associations' Secretary Generals
14 Sep	Joscha Müller, Dena Coordinator, PV Working Group Uwe Sukowsky, BMWK Coordinator. PV Working Group
16 Sep	Arno Gattinger, Austrian Federal Ministry for Climate Action, Environment, Energy, Mobility ... Maximillian Mansbart, Austrian Federal Ministry for Climate Action, Environment, Energy, Mobility ...
22 Sep	Clean Energy Ministerial (CEM)
26 Sep	Catharina Sikow-Magny, Director of ENER.C at DG Energy, European Commission
28 Sep	Matija Matokovic, Policy Officer, DG GROW, Green and Circular Economy (GROW.I.3) Jacek Truszczyński, Deputy Head of the Green and Circular Economy Unit, DG GROW
30 Sep	Eszter Batta, Policy Assistant, Cabinet of the Commissioner Thierry Breton Barbara Glowacka, Member of Cabinet, Cabinet of the Commissioner Kadri Simson
12 Oct	Dietmar Gründig, DENA Coordinator, Stilpe Process Dirk von der Hude, BMWK Coordinator, Stilpe Process
11 Nov	Kerstin Jorna, Director General, DG GROW, European Commission
21 Nov	Kurt Vandenberghe, Member of the Cabinet, President U- von der Leyen Daniel Gerber, Policy Officer, GROW.I.3, DG GROW, European Commission Matija Matokovic, Policy Officer, GROW.I.3, DG GROW, European Commission Ignacio Asenjo, Policy Officer, ENER.C.1 DG ENERGY, European Commission Eszter Batta, Policy Assistant, Cabinet of the Commissioner Thierry Breton Demos Spatharis, Head of Unit, COMP.H.2, DG COMP, European Commission
23 Nov	Stefanie Sifft, Director at Saxony Liaison Office Brussels Marek Schaller, Desk Officer Energy at Saxony Liaison Office Brussels Schaller
6 Dec	Maive Rute, Deputy Director-General, DG GROW, European Commission Jacek Truszczyński, Deputy Head ,GROW.I.3, DG GROW, European Commission Matija Matokovic, Policy Officer, GROW.I.3, DG GROW, European Commission Daniel Gerber, Policy Officer, GROW.I.3, DG GROW, European Commission Ignacio Asenjo, Policy Officer, ENER.C.1, DG ENERGY, European Commission
9 Dec	Thierry Breton, EU Commissioner for the Internal Market
25 Jan	Consortium of Europe's RES Associations' Secretary Generals
25 Jan	Peter Van Kemseke, Member of the Cabinet, President Ursula von der Leyen Thomas Woolfson, Member of the Cabinet, EVP Margarete Vestager Angelika Gruber, Policy Assistant, Commissioner Thierry Breton Cabinet Matija Matokovic, Policy Officer, GROW.I.3 Green and Circular Economy, European Commission Virginijus Sinkevičius, Commissioner for Environment, Oceans and Fisheries Simonas Šatūnas, Head of Cabinet, Commissioner Virginijus Sinkevičius

[www.esmc.solar](http://www.esmc.solar)  
Energy Hub – 146 Rue Royale  
1000 Brussels, Belgium



**Dr. Johan Lindahl**  
Secretary General  
[lindahl@esmc.solar](mailto:lindahl@esmc.solar)

**Žygimantas Vaičiūnas**  
Policy Director  
[vaiciunas@esmc.solar](mailto:vaiciunas@esmc.solar)

**Jens Holm**  
Sustainability Policy Director  
[holm@esmc.solar](mailto:holm@esmc.solar)

**Amelia Oller Westerberg**  
Market Analyst  
[westerberg@esmc.solar](mailto:westerberg@esmc.solar)