



ESMC'S QUARTERLY RECAP

Q3 has come to an end, and we look back at months with high activity in several of our policy areas. In this communication, we summarize ESMC's last three months' highlights, deliveries, new members and working group results.

We have seen the United States value the critical and strategic importance of its domestic PV Industry and support it accordingly through the Inflation Reduction Act. With several US\$-¢ in manufacturing credits per W_p of manufactured p-Si, wafers, cells and modules, this packaged large support is expected to effectively stimulate the American upstream PV industry. Similarly, manufacturing in China and India is well supported. At ESMC, we continue to advocate for similarly strong measures, but adapted to the special opportunities and limitations of the European Union.

Timely, the European Commission is actively working on finalizing the details of the EU Solar PV Industry Alliance and we hope that it will strengthen the position of the European PV Industry. Internally, we are preparing for the task of being part of the Steering Committee of the Alliance, both by collecting feedback on policy measures and by performing an inventory of our active working groups and the need for new ones. These measures are taken not to lose time and to be prepared to make the most of the direct channel between the European Commission and the PV industry that the Alliance will provide.

ESMC continues to grow, both in size and in representational scope. This is a pleasing development as we aim for ESMC to reflect the whole European PV industry, equally in terms of market segment applications, technology, value chain and geographical distribution.

Lastly, it was wonderful to meet so many of you at the 8th World Conference on Photovoltaic Energy Conversion (WCPEC-8) in Milano. We also continued the tradition of organizing a networking event with a local theme, which in the case of WCPEC-8 was an evening with Italian food and wine. Thanks to all members and friends who participated, and until next time!

Dr. Johan Lindahl
Secretary General

To strengthen our interorganizational 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





Photo: ESMC Board Director Andreas Bett (Fraunhofer ISE), ESMC Co-chair Gaëtan Masson (Becquerel Institute) and ESMC Secretary General Johan Lindahl, in the ESMC Member Booth at WCPEC-8 in Milano September 26th.

"To meet Europe's renewable energy objectives — and avoid replacing a dependency on Russian fossil fuels with new dependencies — we are launching an industrial alliance for solar energy. With the alliance's support, the EU could reach 30 GW of annual solar energy manufacturing capacity by 2025 across the full PV value chain..."

-Commissioner Thierry Breton

EcoDesign and Energy Labelling

The European Commission is advancing on EcoDesign and Energy Label as mandatory regulation for PV modules and inverters, in addition to voluntary Green Public Procurement. Following the consultation forum, in which ESMC participated and provided **feedback**, the **public consultation** is now open. From 23 September 2022 to 16 December 2022, all members are welcome to submit individual input to the European Commission.

Innovative renewable technologies in 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 which in a **letter** call on the EU's indicative target aimed to ensure that at least 5 % of new installed renewable power and heating and cooling capacity until 2030 shall be of innovative renewable energy technologies. A **report** on the same subject has also been published.

Third Innovation Fund Large Scale Call

As part of the **REPowerEU Plan**, the European Commission will double the funding available for the 2022 **Large Scale Call of the Innovation Fund** this autumn to around EUR 3 billion. ESMC has joined forces with several other Renewable Energy Associations to approve the evaluation procedure. Apart from the general call for proposals, three 'specific REPowerEU windows will support (1) innovative electrification and hydrogen applications in industry, (2) innovative clean tech manufacturing (such as electrolysers and fuel cells, **innovative renewable equipment**, energy storage or heat pumps for industrial uses), and (3) mid-sized pilot projects for validating, testing and optimizing highly innovative solutions. The call will be launched in November and ESMC is planning to host a member-exclusive event with European Commission representation in December, and information will follow via email.

EU Solar Strategy and the EU Solar PV Industry Alliance

Since the last recap, the European Commission has formally **endorsed the new EU Solar PV Industry Alliance** (part of the **EU Solar Energy Strategy** that was adopted on May 18th). Its launch is planned for December. This marks an important step in creating scaled and long-term competitive PV manufacturing capacities in Europe, as concrete actions have been made from the strategic acknowledgement of the need of a competitive and sustainable PV manufacturing industry in Europe.

ESMC **commented** the endorsement saying that the fact that Europe imported an unprecedented 26 GW of PV modules in 2021, and has very ambitious goals of 600 GW PV deployment by 2030 clearly confirms the critical need for Europe to establish competitive PV manufacturing capacities domestically. Moreover, **concrete framework proposals** were presented for the Alliance.

Additionally, ESMC is foreseen to be part of the Steering Committee and is preparing internally for the task.

Conferences

September brought the opportunity to participate in **WCPEC-8** (Milano) and the **European Sustainable Energy Week, EUSEW** (Brussels). ESMC was represented in both conference exhibition fairs. In Milano, we collaborated with **Solar United** and joined members of both our organizations in an opportunity to share the booth with colleagues in the European PV Industry.

See sections “Official presentations in Q3” and “Official meetings in Q3” to read more about our activities at these two conferences.

Important Projects of Common European Interest (IPCEI)

ESMC initiated IPCEI process for PV in summer 2021 in collaboration with the **European Solar Initiative**. The **PV-IPCEI** framework has already attracted over 60 European companies and research organizations under the chair of ESMC. The possibility to join already formed projects or to propose new projects based on innovative PV technologies is still open.



Photos: ESMC Policy Director Žygimantas Vaičiūnas, Executive Vice-President Margrethe Vestager (left picture) and ESMC Market Analyst Amelia Oller Westerberg at EUSEW 2022.

In May 2022, the **PV-IPCEI** received the European Commission’s support in the **EU Solar Energy Strategy** and several **EU Member States support** the framework, with **Spain leading the process**. ESMC presented the PV-IPCEI on **EUSEW 2022**, providing visibility to the framework and arranging meetings with political stakeholders.

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



Forced labour issue acknowledgement in the EU

The European Parliament has passed a **new resolution** condemning human rights abuses in China's Xinjiang region and has called the European Commission to enact tougher trade sanctions on the country.

ESMC certainly endorses this step made by the European Parliament. It is entirely in line with our previous **communication**, stating the issue of forced labour as one reason why we need to establish a full PV value chain in Europe as fast as possible, as forced labour is not only morally deplorable, but also distorts competition.

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. First out are **Andreas Bett** (Fraunhofer ISE), **Lucas Weiss** (Voltec Solar) and **Bernhard Krause** (Singulus Technologies).

There are several more articles to come, stay updated through our **website** and **LinkedIn-page**.



PROF. ANDREAS BETT

Director
Fraunhofer ISE

Location:
Freiburg, Germany

No. years in the industry:
35 years

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DR. LUCAS WEISS

Chief Executive Officer (CEO)
Voltec Solar

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Alsace, France

No. years in the industry:
16 years

Company webpage:
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BERNHARD KRAUSE

Spokesperson
Singulus Technologies

Location:
Kahl, Germany

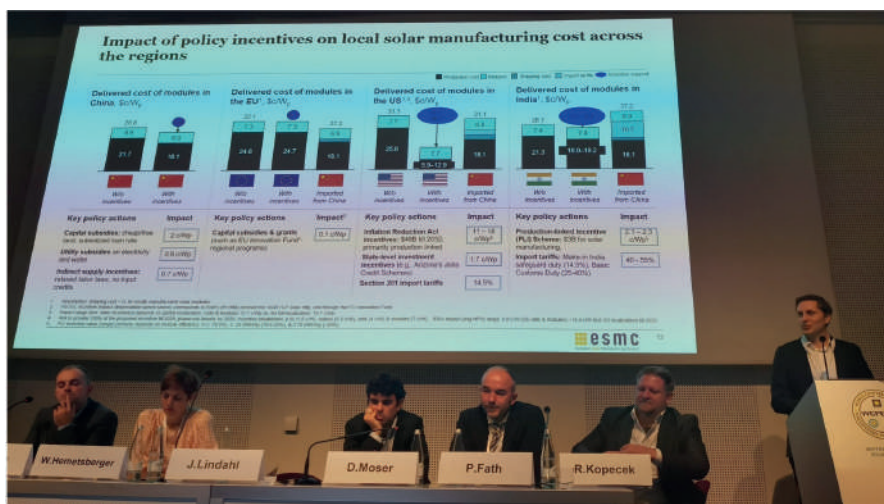
No. years in the industry:
15 year

Company webpage:
www.singulus.com

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OFFICIAL PRESENTATIONS IN Q3

Date	Conference	Organizer	ESMC representative
14 July	Next steps for Jiu Valley transition from coal	TRACER project	Johan Lindahl
31 Aug	New Technologies in Solar Manufacturing	ISA Roundtable - Africa	Eicke R. Weber
15 Sep	Solitek Annual Conference - Policy Actions for the PV manufacturing in Europe	Solitek	Žygimantas Vaičiūnas
21 Sep	Roundtable Energy4Europe: German-Spanish Solar Initiative	Cámara de Comercio Alemana para España	Žygimantas Vaičiūnas
26 Sep- 29 Sep	European Sustainable Energy Week (EUSEW)	European Commission	Žygimantas Vaičiūnas Amelia Oller Westerberg
26 Sep	Industry summit	WCPEC	Johan Lindahl
27 Sep	NB8 Forum III „Energy security and climate change – how Northern Europe deals with this dramatic challenge”	Honorary Consuls of NB8	Žygimantas Vaičiūnas



ESMC Secretary General Johan Lindahl (right) at the Industry Summit at the 8th World Conference on Photovoltaic Energy Conversion, Milano.

OFFICIAL MEETINGS IN Q3

Date	Meeting	Title	Topic
21 July	Dietmar Gründig Dirk von der Hude	DENA Coordinator, Stilpe Process BMWK Coordinator, Stilpe Process	Stakeholder dialogue for industrial production capacity for the energy transition
25 July	Alexandre Israelian	DG for Enterprise, Ministry of Economy and Finance	Potential participation of France in PV-IPCEI framework
7 Sep	Donagh Cagney Dirk Hendricks Pedro Dias Greg Arrowsmith Iván Pineda Mark Morris Jozefien Vanbecelaere Sanjeev Kumar Dries Acke Penelope Nabet	Policy Director, Ocean Energy Europe Secretary General, EREF Secretary General, Solar Heat Europe Secretary General, EUREC Director, Innovation at Wind Europe Director, Samui France Head of EU Affairs, European Heat Pump Association Head of Policy, EGEC Director at SolarPower Europe Policy Officer at EIT InnoEnergy	Meeting of RES association Directors Study on higher RES +EE 2030 targets Innovation sub-target in RES Directive Innovation Fund 3rd call
14 Sep	Joscha Müller Uwe Sukowsky	Dena Coordinator, PV Working Group BMWK Coordinator. PV Working Group	Stilpe Working Group - PV
16 Sep	Arno Gattinger Maximillian Mansbart	Austrian Federal Ministry for Climate Action, Environment, Energy, Mobility, Innovation and Technology	PV-IPCEI framework and Austrian participation in the initiative
22 Sep	Clean Energy Ministerial	Clean Energy Ministerial	Launch of the Transforming Solar Supply Chains Initiative at the 1st Global Clean Energy Action Forum
26 Sep	Catharina Sikow-Magny	Director of ENER.C at DG Energy, European Commission	General EU energy policy topics, including EU Solar PV Industry Alliance
28 Sep	Matija Matokovic Jacek Truszczynski	Policy Officer, DG GROW, Green and Circular Economy (GROW.I.3) Deputy Head of the Green and Circular Economy Unit, DG GROW, European Commission	EU Solar PV Industry Alliance
30 Sep	Eszter Batta Barbara Glowacka	Policy Assistant, Cabinet of the Commissioner Thierry Breton Member of Cabinet, Cabinet of the Commissioner Kadri Simson	EU Solar PV Industry Alliance, PV-IPCEI framework