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■ Activity Catalogue

■ Q2/2023 - Q1/2024

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

For the third full year as Secretary-General, I want to extend my deepest gratitude for your unwavering confidence in myself and the dedicated team at the secretariat to represent you in the continuous dialogue with Europe's political and industrial stakeholders.



Dr. Johan Lindahl
[Secretary General]

lindahl@esmcsolar

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.

ESMC has grown significantly during 2023, welcoming our 77th member to the organization at our last Board Meeting for the organizational year (Q2 2023 - Q1 2024) and have hence cemented a position as the voice of the European PV manufacturing industry. Simultaneously, the issue of European PV manufacturing has become increasingly actualized.

With the Annual General Meeting concluded in March, this report lists the European Solar Manufacturing Council'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 and event participation during the year. The autumn and winter have been crucial in shaping my retrospective view of the year.

As early as in June 2023, we started to notice a rapid decrease in the prices of imported Chinese modules and warned the European Commission about the consequences for the industry of this

development. There are several partial explanations for this price trend and its impact on the European market. Firstly, it is the result of a very aggressive Chinese industry strategy. China's state-guided economy spent nearly \$80 billion on clean-energy manufacturing last year, around 90% of all such investment worldwide. The rapid growth of China's new breed of green exports — which rose 30% year-on-year to \$139.3bn in 2023 — has boosted the world's second-largest economy as it struggles with a real estate bubble, deflationary pressure, and low investor confidence. With significant subsidies and a strategic focus on net zero technologies, China is effectively solidifying its position as a dominant force. This industry strategy has resulted in a huge overcapacity — an estimated annual production capacity of about 800 GW as compared to the global annual market of approximately 450 GW in 2023. It is perhaps needless to say, but one can conclude that the Chinese PV manufacturing capacity expansion have not reflected market signals but has been driven by opportunism and state subsidies.

ESMC Secretariat



Žygimantas Vaičiūnas
[Policy Director]

vaiciunas@esmcsolar

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, Member State Representatives, and financial policies. He also manages the PV-IPCEI initiative.



Jens Holm
[Sustainability Policy Director]

holm@esmcsolar

Core responsibilities:

Jens is responsible for the sustainability policies and in charge of defining ESMC's further work on Ecodesign, Energy Labelling, the Carbon Border Adjustment Mechanism (CBAM), Corporate Sustainability Due Diligence Directive (CSDDD), and Forced Labour Regulation.



Amelia Oller Westerberg
[Market Analyst & Communications]

westerberg@esmcsolar

Core responsibilities:

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

Secondly, identifying the risk it means to be completely depended on China for the energy transition, two of the other global superpowers — and major PV markets — the US and India has started to close their markets towards China by introducing import tariffs on Chinese modules (and are given attractive subsidies to new PV manufacturing projects). In addition, US has banned the import of Chinese modules linked to Xinjiang, resulting in streams of rejected modules connected to forced labor being redirected to Europe. The closure of these two markets and the huge overcapacity is the reason for and over supply of PV modules in Europe, which has led to current unsustainable low module prices, which are below the manufacturing costs of also the major Chinese producers.

This has created an extremely pressured situation for our members and have forced a number of to completely close down production for good. While this picture is bleak, it's the reality we're currently facing, and much of our effort is focused on easing this situation and demonstrating to the European Commission that if we bridge this gap, we have very good prospects of becoming competitive once the Net-zero Industry Act (NZIA), the CAPEX support from some member states, the forced labor regulation and the EcoDesign directive is fully implemented.

We have consistently communicated to policymakers the necessity of a comprehensive approach, encompassing with short term emergency measures, OPEX support, long-term political commitment, measures against forced labour, and models for guaranteed market demand for EU-made products. However, despite our persistent efforts, we acknowledge the lack of decisive action from European political leaders, and share in your frustration.

As we look ahead, let us remain steadfast in our pursuit of a level playing field for the European PV manufacturing industry. ESMC will of course continue to advocate for the interests of our members and the advancement of our shared objectives.

Thank you for your continued support and dedication.

Board of Directors 2023/2024



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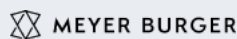
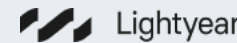
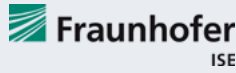
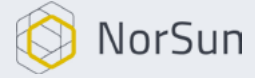


Torgeir Ulset
[Board Director, REC]



Christoph Podewils
[Board Director, Meyer Burger]

Members



Emergency measures

Short-term support in response to the ultra-low prices of imported modules from China

Since the beginning of summer 2023, ESMC has consistently presented proposals, issued warnings, and communicated with the European Commission about the challenges facing our members.

We've emphasized the need for specific measures to prevent disruptions or complete shutdowns of European module manufacturers' operations due to the unsustainably low prices of imported Chinese modules. Particularly after the summer, as insolvencies and production halts were announced, the entire European solar industry rallied together in an industry call initiated by ESMC to support the sector.

Since then, we've been closely monitoring developments, providing both quantitative and qualitative [analyses](#) to the European Commission and Parliament, supported by surveys and communications with our module manufacturing members.

Our primary arguments revolve around establishing a level playing field, currently absent as China allocates significantly more funding compared to their GDP towards industry support than the EU, particularly in strategic net-zero technologies like Solar PV manufacturing. Consequently, manufacturing in China, exempt from stringent environmental regulations and fair labor standards that European manufacturers gladly adheres to, benefits from generous CAPEX and OPEX support, including subsidized electricity. Similar support systems exist in other major competing markets such as the USA, Turkey, and India, all striving to bolster their domestic solar manufacturing. This support to get a levelled playing field can manifest in various forms, and ESMC has been transparent and constructive regarding the methods of implementing such support. We have put forward numerous proposals for tangible measures aimed at addressing these challenges.

Moreover, there's a crucial link to energy supply security in times of global conflicts, where renewable energy technology stands as a strategic asset.

The EU has legally and morally binding targets for renewable energy deployment which are currently close to fully dependent on imports from third countries. Notably, only the necessity for substantial volumes of PV modules within a decade or two to repower existing large-scale PV parks in Europe underscores the urgency to safeguard and increase the domestic PV industry. To decarbonize the current electricity system and expand it to accommodate widespread electrification across various sectors is a key target for politicians and officials across the Union, and the PV manufacturing industry in Europe is an important variable in that equation.

Additionally, the connection to state-enforced forced labour practices against the Uyghur population in western China and the consequent low prices of PV modules is addressed in another section of this annual report — but it is concerning that products manufactured cheaply through forced labour can infiltrate the European market and be falsely marketed as sustainable.

Our analyses highlight a clear import dependency, particularly from China, which shows no signs of diminishing. While we've established an understanding on this matter with the European Commission, we continue our tireless efforts to translate dialogue into political action. Please refer to the next page for our communications, supported by numerous official and unofficial meetings, communications with policymakers, email exchanges, and press releases.

A significant development just before the Annual General Meeting was our Secretary General's invitation to a Working Lunch on the State of the Solar Power Sector in Europe, alongside Commissioner for Energy Kadri Simson and Energy Ministers from the Member States (or representatives). During this event, our Secretary General had the opportunity to directly present the current status of the European PV manufacturing industry. Following this, the secretariat is now diligently working on the follow-up actions.



○ Brussels Monday March 4th 2024.

Picture from the Working Lunch on the State of the Solar Power Sector in Europe, alongside EU Energy Commissioner Kadri Simson and EU energy ministers.



**July 2023
ESMC NOTE**

ESMC warns the European Commission that the EU PV manufacturing plans are under pressure from sharp drop in prices for solar modules from China.



**September 2023
JOINT INDUSTRY CALL**

ESMC organised a joint industry call, following bankruptcy announcements, to warn that the future of the European solar industry and a resilient European energy supply are in utmost danger, accompanied by an [ESMC position paper](#).



**November 2023
JOINT INDUSTRY CALL**

Members of ESMC convened to advocate for a more sustainable low-carbon economy by the potential of the Net Zero Industry Act as it was framed by the ITRE Committee.



**January 2024
PRESS CALL**

Following announcements of bankruptcy and closedowns, ESMC expresses grave concern over the current state of the European solar PV manufacturing industry, citing a lack of favorable market conditions.



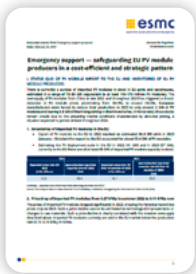
**January 2024
ESMC LETTER**

ESMC sent a letter and report to the European Commission outlining the status of EU PV module producers, highlighting existing industry harm, inventory concerns, and suggesting emergency measures.



**February 2024
ESMC HIGH-LEVEL LETTER**

A follow-up letter was sent on behalf of ESMC to the President, Executive Vice-Presidents, and Commissioners, with a firm statement on the urgency of putting emergency measures in place.



**February 2024
ESMC LETTER**

ESMC submits an emergency support proposal ahead of the EU ministerial meeting on how the European Commission and the member states can safeguarding EU PV module producers in a cost-efficient and strategic way.

Safeguard measures

A critical last-resort action for the survival of the industry

If emergency measures aren't put in place in time, and if the European Commission and other legislative authorities in the Member States can't figure out how to provide the necessary support, ESMC will consider using all available measures, including safeguards.

In late 2023 and early 2024, ESMC initiated the feasibility evaluation of implementing an official safeguard investigation. This process involves the consideration of provisional measures, which can be imposed for a maximum of 200 days in critical circumstances, provided a

preliminary determination presents clear evidence of harm or impending harm.

The initial stages included gathering support within the industry, as well as from the European Commission and to identify possible Member States that could put forward the request. By conducting surveys on price declines and exploring potential explanatory models beyond unfair practices, we ensured the robustness of our case in preparation for presenting it.

ESIA: The EU Solar PV Industry Alliance

In the EU Solar PV Industry Alliance (ESIA), the entire European PV Value chain is brought together, including manufacturers, researchers, wholesalers, installers, and distributors, under the leadership of the European Commission, IET Innoenergy, ESMC, and SolarPower Europe.

The aim is to collectively formulate recommendations and proposals to strengthen the European manufacturing value chain and achieve the goal of a 30 GW capacity along the full solar value chain within Europe's borders by 2030. By the end of the organizational period in 2023/2024, the alliance had been active for about a year, with ESMC overseeing the Supply Chain Working Group, WG 2.

Additionally, we've had representatives actively contributing to the work in the other Working Groups: WG1

Demand Side Policies, WG3 Financing, and WG4 Skills, as well as serving on the Steering Committee.

Throughout this year, ESMC has actively participated in producing all ESIA recommendation papers, including those directly related to the Working Group we manage, as well as initiating or contributing input to the others. See the recommendation papers to the right for your reference.

In addition, ESMC has represented the European PV manufacturing industry at the ESIA Forum during Intersolar 2023, participated in various ESIA exchanges with the European Commission, and attended a ministerial meeting.

Our focus and mandate in ESIA is always to spotlight the challenges and opportunities specific to our members.

Policy Update Meetings

Originally an internal working group focused on ESIA topics, has now evolved into a monthly policy-update meeting accessible to all ESMC member affiliates. The meeting takes place on the last Tuesday of each month, with invitations sent shortly beforehand.

As with all ESMC Working Groups, representatives from all member companies and organizations are encouraged to participate. If you're not listed as a contact for your organization with ESMC, reach out to the secretariat, and we'll ensure you receive an invitation.



September 2023 RECOMMENDATIONS PAPER SERIES I
Recommendations on financial mechanisms to fill the cost gap and restore the PV industry in Europe



October 2023 RECOMMENDATIONS PAPER SERIES II
Addressing uncertain antimony content in solar glass for recycling



November 2023 RECOMMENDATIONS PAPER SERIES III
Effective and practical implementation of non-price criteria in specific public procurement, public auctions, and residential market segments for solar PV systems



March 2024 RECOMMENDATIONS PAPER SERIES IV
Stance against forced labour & a Due Diligence Guide for Solar PV Supply Chains



March 2024 AN IN-DEPTH LOOK AT THE INGOT-WAFER SUPPLY CHAIN
Final report summarizing the findings of interviews conducted for the supply chain gap study

Ecodesign and Energy Labelling

For several years, ESMC has been closely monitoring the progress of introducing Ecodesign and energy labeling for PV modules and inverters. Ecodesign entails establishing a minimum set of criteria that both imported and EU-made PV modules must meet. Energy labeling involves affixing consumer labels on products to inform consumers about energy performance and assist them in making more sustainable choices.

The process for implementing these measures for PV modules has been lengthy, during which ESMC has provided considerable feedback to the European Commission. ESMC actively tracks these developments through an internal

Working Group and partnerships with other organizations.

In 2023 and 2024, the process primarily involved internal procedures within the European Commission. ESMC has been providing input throughout this stage.

The notable successes during this period include the advancement of an informational requirement for antimony in solar glass within the Ecodesign legislation and around discussions on potentially utilizing the EPEAT methodology instead of the PEFCR methodology for calculating the CO₂ footprint of solar PV modules. However, it remains uncertain whether the proposed methodology change will be

approved.

The latter achievement resulted from collaboration with Fraunhofer ISE, which conducted a scientific comparison of the two methodologies following initiation by ESMC.

Additionally, ESMC has mobilized the industry and scientific community to jointly address policymakers regarding the importance of selecting a robust methodology. This is crucial for ensuring that the Ecodesign and energy labeling schemes effectively set transparent minimum requirements and guide consumers toward sustainable choices.



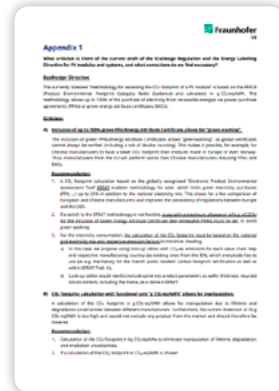
April 2023

Feedback on Ecodesign and Energy labelling for PV modules, inverters and systems.



October 2023

ESIA Webinars – Carbon Footprint Calculation Methodologies. A presentation of the study performed by Fraunhofer ISE, initiated by ESMC.



February 2024

APPENDIX: *What criticism is there of the current draft of the Ecodesign Regulation and the Energy Labelling Directive for PV modules and systems, and what corrections do we find necessary?* Prepared by Fraunhofer ISE.



February 2024

Letter from the European PV manufacturing industry: A request for Ecodesign and Energy Label legislation that serves the environment and European solar PV manufacturing.

The Net-Zero Industry Act

Accelerating the transition to climate neutrality

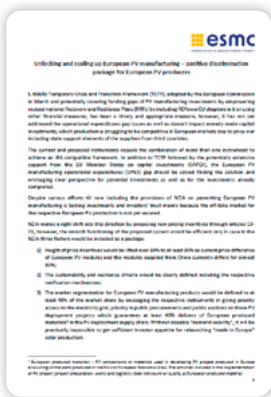
The NZIA is an initiative aimed at bolstering European manufacturing capacity for net-zero technologies and overcoming barriers to scaling up production. The measures outlined in the regulation intend to enhance the competitiveness of the industrial base for net-zero technologies and strengthen the EU's energy resilience.

ESMC has been actively involved throughout the entire process, from conception to adoption of the act. During the latter part of 2023 and throughout 2024, significant attention was directed toward the interinstitutional negotiations, or trilogues, involving the European Commission, the European Council, and the European Parliament. While there were both positive and negative aspects to these discussions, the compromise was naturally worse than the best of the three presented positions. Once the resulting text was released, all ESMC members received [an analysis](#) detailing the outcomes of the trilogues and how they relate to PV manufacturing.

During the very last weeks during the organisational year 2023/2024, the focus shifted to the implementation phase, where the specifics of how the provisions will be applied will be presented. Another key focus is advocating for critical Member States to implement the resilience provisions in the NZIA sooner than stipulated in the Act.

The work with the NZIA marked the primary phase of the policy sprint that we observed during 2023 and 2024, with ESMC directing considerable effort towards mobilizing the industry, both through the ESIA and within ESMC, to present a unified voice to the European Commission and other political stakeholders.

Below are some of the main public comments we have made during 2023/2024 regarding the Net-Zero Industry Act, supported by various press releases and other forms of media positions.



June 2023

Public Consultation Feedback on the Net-Zero Industry Act: Unlocking and scaling up European PV manufacturing – positive discrimination package for European PV producers



November 2023

Die Uhr tickt: Qualitative Kriterien müssen als zentrale Bausteine einer industriepolitischen DNA und einer sozial gerechten Transformation verbindlich



November 2023

The Clock is Ticking: Industry Call to Endorse of the Balanced Text Approved by the ITRE Committee



February 2024

Report from our Policy Director Žygimantas Vaičiūnas & our Sustainability Policy Director Jens Holm.

Social sustainability

Upholding human rights across the global PV value chain

To foster an ethical political environment and address worker exploitation in the PV manufacturing industry, ESMC established a working group focused on eliminating forced labour and promoting a socially sustainable supply chain in 2023.

Social sustainability is crucial in the solar PV industry due to its far-reaching implications for both people and the planet.

Fair labour conditions at every stage of the value chain, worldwide, are a cornerstone of ESMC's efforts in this area. Ensuring equitable and safe working conditions globally not only upholds human rights but also fosters industry growth by attracting a skilled and motivated workforce. It mitigates exploitation, reduces inequality, and empowers communities.

By championing fair labour conditions, the European solar PV industry not only drives sustainable energy adoption but also sets a powerful example for responsible global commerce.

State-enforced forced labor exists in our solar PV value chains, and we strongly condemn it as completely unacceptable. The work on this topic was intense throughout 2023 and 2024, as the EU initiated the process of creating a Forced Labour Regulation and drove it through to the finalization of trilogues during our organizational year.

Below are our central publications and actions on this topic, which are further supplemented by various media appearances and conference participations.

Deliveries from this working group:



- **September 2023** Position paper: [A solar PV supply chain without forced labour](#)
- **September 2023** OpEd: [Don't Let China Dump Its Unethical Solar Panels in Europe](#)
- **November 2023** One pager: [Ahead of interinstitutional negotiations on forced labour](#)
- **December 2023** Letter: [Ahead of Working Party meeting on forced labour \(COM 2022 453\)](#)
- **January 2024** Letter: [PV Manufacturers Demand a Robust Forced Labour Regulation](#)

ESMC Events focused on Forced Labour in the Solar PV Supply Chain



○ Brussels, February 16th 2024.

From right: Reinhard Bütikofer, Member of European Parliament, Adrian Zenz, Victims of Communism Foundation, Anja Lange, First Solar, Rushan Abbas, Campaign for Uyghurs, Johan Lindahl, ESMC, Patricia Carrier, Coalition to End Forced Labour in the Uyghur Region.

1. May 2023, **ESMC Sustainability coffee break — An opportunity for ESMC members to learn more and get acquainted with our Sustainability Policy Director Jens Holm.**

2. September 2023, **ESMC Webinar on Combating Forced Labour Within the Solar Supply Chain.**

3. February 2024, **Trilogue focused on state-sponsored forced labour in the clean energy supply (arranged by ESMC & First Solar).**

Solar PV Manufacturing Package

In October, ESMC advocated for the European Commission to prepare and adopt a “solar PV manufacturing Package” given that the European Commission adopted ‘Wind Power Package’ shortly before. The rationale is to enhance the competitiveness of European PV manufacturing in current critical circumstances of oversupply of imported PV modules from China.

The background is that while the Net-Zero Industry Act goes into the right direction by introducing resilience criteria in auctions and public procurements, the committed capacities for European-produced PV modules should be clearly defined by both legislative and non-legislative decisions, so that European PV manufacturers get a clear segment of market for their resilient PV production.

The Solar PV Manufacturing Package proposal includes:

- Safeguard off-take of European-produced PV products.
- Ensure supply chain resilience by incorporate extra points for European-produced PV modules as resilience and ESG criteria.
- A ban of PV products produced with forced labour.

Despite having achieved a level of understanding among European legislators during this time, we did not receive direct support for this proposal. However, following discussions in March, just before our annual meeting in 2024, the issue was brought back on the political agenda, and a “European Solar Charter” entered development shortly thereafter.



October 2023

ESMC Proposal

EU ‘Wind Power Package’ should be complemented by the ‘Solar Manufacturing Package’ — Including 5 key milestones to include in the ‘European Solar Manufacturing Package’.



Temporary Crisis and Transition Framework

& REPowerEU

In early March 2023, the European Commission adopted the [Temporary Crisis and Transition Framework \(TCTF\)](#) to support Net-Zero industries during times of crisis. ESMC played an active role in advocating for exemptions to state aid rules and maintained continuous communication with the European Commission leading up to this decision.

One [communication effort](#) by ESMC aimed at clarifying a common misunderstanding regarding the timeline of the TCTF framework. While one condition for aid is that it must be granted by December 31, 2025, it's important to understand that this date

marks the deadline for Member States to inform the European Commission about their chosen aid framework. The actual disbursement of aid, whether for capital expenditures, tax advantages, loans, or state guarantees, has no set time limit, as confirmed by the European Commission.

ESMC's analysis reveals a significant advantage of the TCTF measure that hasn't been fully recognized: the absence of a time limit. This aspect could make the TCTF even more attractive for revitalizing the European PV industry than initially anticipated.

ESMC also urged EU Member States and European PV manufacturing companies to swiftly secure financial support through the [REPowerEU](#) chapters of the revised national Recovery and Resilience Plans. This offered a rapid and practical financing opportunity for the European PV manufacturing industry. The €20 billion REPowerEU financial envelope presents an appropriate financing mechanism to develop competitive PV manufacturing capacities across Europe.

Market reports



Shining light on European BIPV — A survey of dependence and fragmentation in the emerging European value chain for building integrated photovoltaics

Presented by Gerardo López Pinto and Fredrik Özaras from Chalmers University of Technology, who were responsible for executing the project, under the supervision of our Secretary-General Johan Lindahl.



Dominant PV Trade Flows In Europe 2022

Right after the AGM 2023, ESMC published its annually updated trade flow report for the previous year, revealing the import and export of PV modules into and out of EU27, along with national trade flows for the top 10 deployment markets within the EU.

DPP — Domestic Production Portfolio Label

Given the challenges that the European PV Manufacturing industry faces and the subsequent widening gap between the prices of imported PV modules and the cost of domestically produced ones, ESMC initiated a new Working Group in January 2024. Inside this Working Group, the “Domestic Production Portfolio” (DPP) scheme is being developed.

The DPP label encourages a shift towards procuring domestically produced PV modules by offering a voluntary commitment label. This commitment involves off-takers subscribing to the program and gradually increasing the

share of European modules in one’s sales portfolio. It proposes mechanisms like price leveraging to mitigate the cost difference between European and imported modules — to establish a complete European value chain covering 40% of the market by 2030. Ultimately, as European PV production costs become competitive, the relevance of the DPP label may decrease, potentially becoming obsolete after 2030.

The target is for the DPP scheme to undergo a pilot launch by 2025, with quotas progressively increasing each year and varying levels of local content. This strategy aims to encourage the adoption

of domestically produced modules, ultimately reaching the designated targets by 2030.

By the end of the organizational year 2023/2024, the scheme had not been publicly communicated, taking into account the ongoing policy discussions and the need to maintain focus on resilience efforts as directed by policymakers.

[Here is the internal one-pager for initial bilateral discussions with stakeholders who may become involved in the DPP Label.](#)

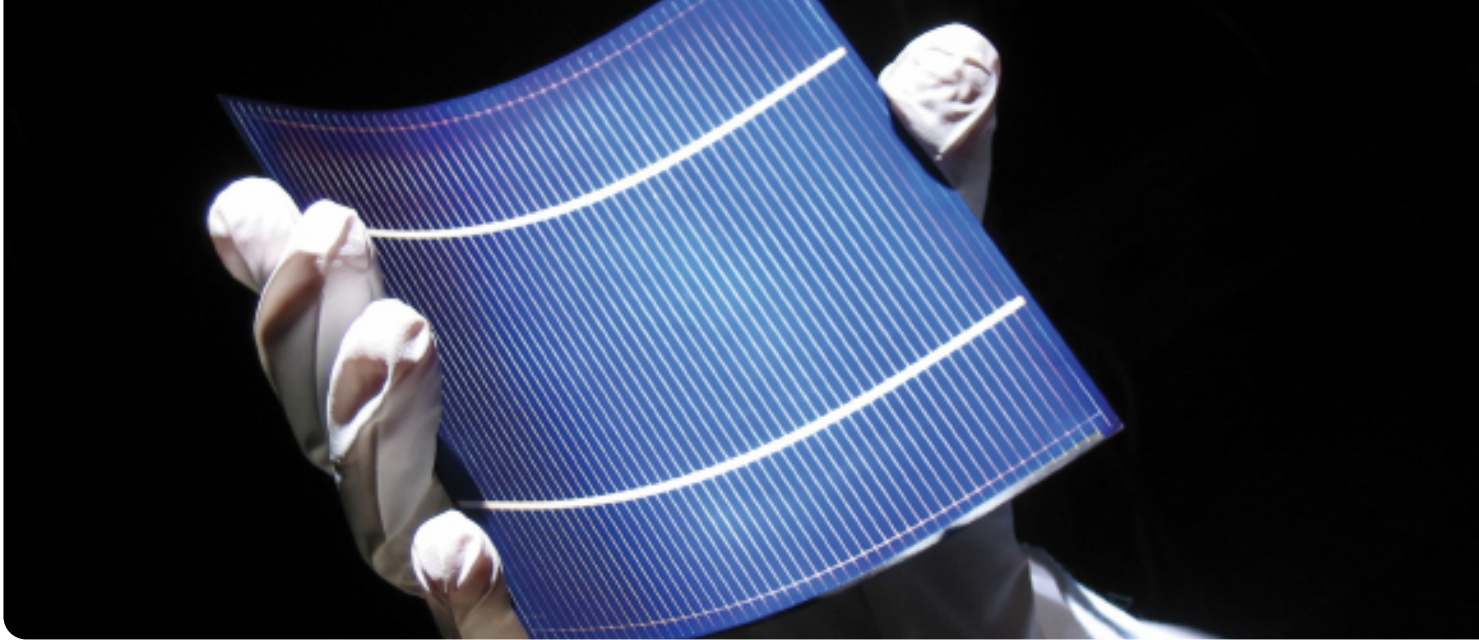
A new EPEAT Label for low-carbon PV-modules

In March 2023, a new global certification of low-carbon embedded modules was launched. This significant achievement was made possible by the non-profit organization [Global Electronics Council](#), with funding from the [Ultra Low-Carbon Solar Alliance](#) (ULCSA).

ESMC has actively participated in this initiative alongside other key stakeholders. In this milestone development, the Council has successfully integrated a set of criteria within the [Electronic Product Environmental Assessment Tool](#) (EPEAT) to effectively evaluate and label the climate impact of PV module manufacturing. This certification will serve as a vital resource for companies and individuals dedicated to reducing their carbon footprint and fostering sustainability in the PV industry.

Furthermore, ESMC strongly encourages the European Commission to consider adopting this methodology as the foundation for establishing CO₂ footprint criteria in the Ecodesign regulation. Not only is this approach robust and reliable, but it will also streamline the process for our members. We are glad to see that two out of the three [first manufacturers](#) that are pursuing EPEAT Ecolabel in 2023 are members of ESMC.





©imec

National Support Systems

ESMC has been actively engaged in communication with the national governments of the EU Member States to raise awareness of the opportunities that emerged with the Temporary Crisis and Transition Framework and the RePowerEU.

During the year, Spain allocated €1 billion dedicated to net-zero industries and the first call of €750 million [was announced](#) in late February. The Netherlands allocated €412 million through the National Growth Fund for the PV program [SolarNL](#), aimed at large-scale production of circular solar cells and solar panels in the Netherlands.

While there were initially promising signs of robust support from the German government, starting with a call for proposals for 10 GW of PV manufacturing — including a minimum annual production capacity of 2 GW of highly efficient low carbon modules — this initiative was hindered by national budget constraints. Additionally, there were subsequent setbacks, such as the blockage of resilience bonus payments.

Despite these challenges, ESMC remains committed to collaborating with our members in all Member States to influence national and regional policymakers.



Innovation Fund

€4 billion call for proposals for net-zero technologies

In December 2023, the EU Innovation Fund initiated a call for small, medium, and large-scale projects with budget of €4 billion. Notably, €1.4 billion of this funding was designated to support projects related to the manufacturing of innovative clean-tech components for hydrogen production/consumption, renewable energy, and energy storage.

Since several members of the ESMC, including Enel Green Power, Meyer Burger, Midsummer, REC Solar, and Norsun, have successfully secured funding for noteworthy projects within the European PV industry through the Innovation Fund, ESMC communicated this opportunity and encouraged our members to seize the chance.

Official Presentations Since the Last Annual General Meeting

DATE	Conference	Organizer
12 Apr	PV Market Insights 2023	EXCO, Korea Photovoltaic Society
10 May	Solar + Storage España	PV-MAGAZINE
10 May	ETIP-PV: PV Innovation - Assuring Europe's Energy Independent Future with Photovoltaics	ETIP-PV
11 May	VIPERLAB First Public event	VIPERLAB
14 Jun	ESIA Forum at Intersolar	European Solar PV Industry Alliance (ESIA)
15 Sep	ESIA Webinar on Ecodesign and labelling requirements	ESIA
18 Sep	Industry forum	EUPVSEC
26 Sep	How to stop forced labour in the solar PV supply chain	ESMC
17 Nov	EU - U.S. TTC Working Group 1: Technology Standards - Hybrid Event	EU - U.S. TTC
6 Dec	PV Magazine Roundtable — Supply chain spotlight: Prices & production prospects	PV-MAGAZINE
1 Feb	Global trends in the PV manufacturing industry	Solar Elmia
8 Feb	EU policy and legislation for PV - SolarNL Kick-off event	SolarNL
15 Feb	A Trilogue on Forced Labor in Clean Energy Supply Chains	ESMC
4 Mar	OECD - European Commission Foresight Workshop	OECD, European Commission



ESMC's Policy Director Žygmantas Vaičiūnas presenting at the Solar + Storage España, May 10th 2023.

Official Meetings Since the Last Annual General Meeting

DATE	Topic	Official contact/participant
3 Apr	ESIA Supply Chain WG	PV Industry representatives
11 Apr	ESIA Demand side WG	PV Industry representatives
11 Apr	ESIA Finance WG	PV Industry representatives
20 Apr	Net-Zero Industry Act	European Commission
26 Apr	ESIA Finance WG	PV Industry representatives
27 Apr	TCTF, IPCEI, General support for PV manufacturing, RRP revisions	RES Associations
27 Apr	ESIA Demand side WG	PV Industry representatives
28 Apr	Forced Labour prevention	DG Grow
9 May	Forced Labour prevention	Members of Parliament
12 May	IPCEI	Austrian federal Ministry of Climate Action
15 May	ESIA Demand side WG	PV Industry representatives
16 May	ESIA Supply Chain WG	PV Industry representatives
17 May	TCTF, RRP revision by inclusion of REPowerEU chapters	Invest NL
26 May	Forced Labour prevention	Members of Parliament
30 May	ESIA Finance WG	PV Industry representatives
12 Jun	ESIA	ESIA Steering Committee
14 Jun	ESIA Demand side WG	PV Industry representatives
15 Jun	ESIA Supply Chain WG	PV Industry representatives
20 Jun	ESIA	ESIA Steering Committee
21 Jun	Spanish Support for PV manufacturing	Dirección Energías Renovables (IDAE)
29 Jun	ESIA Finance WG	PV Industry representatives
30 Jun	ESIA Supply Chain WG	PV Industry representatives
7 Jul	ESIA Finance WG	PV Industry representatives
17 Jul	Antimony in Solar Glass	DG Grow, PV Industry representatives
16 Aug	Unsustainably ultra-low price of PV modules	DG Grow
21 Aug	ESIA	ESIA Steering Committee
7 Sep	General situation of European PV manufacturing	European Commission
8 Sep	Roundtable on Ecodesign, Energy Labelling and Circular Economy	RES Associations

8 Sep	ESIA Supply Chain WG	PV Industry representatives
13 Sep	ESIA	ESIA Steering Committee
14 Sep	Joint ESIA Supply Chain & Demand Side WG	PV Industry representatives
21 Sep	The EPEAT vs PEFCR carbon footprint methodology	DG Grow
22 Sep	Market data	DG Trade
25 Sep	TCTF	Member of the Cabinet, EVP M.Vestager
25 Sep	Emergency buy-out of European produced PV modules	DG Near
25 Sep	Possible EU Ministerial meeting, emergency measures	DG Internal Market
25 Sep	Net-Zero Industry Act	Wind Europe
26 Sep	Solar PV Manufacturing Package	DG Energy
26 Sep	REPowerEU, Inclusion of PV manufacturing into European semester	DG Energy
26 Sep	Solar PV Manufacturing Package	Member of the Cabinet, EVP M.Šefčovič
27 Sep	Letter from ESMC, fast-track actions	Commissioner T.Breton Cabinet
27 Sep	Anti-subsidy and anti-dumping investigations	Member of the Cabinet, EVP V.Dombrovskis, DG Trade
27 Sep	Emergency buy-out of European produced PV modules	DG Near
5 Oct	Joint ESIA Supply Chain & Demand Side WG	PV Industry representatives
6 Oct	Joint ESIA Supply Chain & Demand Side WG	PV Industry representatives
11 Oct	Joint ESIA Supply Chain & Demand Side WG	PV Industry representatives
13 Oct	Joint ESIA Supply Chain & Demand Side WG	PV Industry representatives
20 Oct	Communication around current market situation	Bundesverband Neue Energiewirtschaft e.V.
24 Oct	Net-Zero Industry Act	Commissioner T.Breton Cabinet
24 Oct	Key emergency measures for European PV manufacturing	DG Trade, DG Internal market, DG Grow
24 Oct	Safeguard measures	Head of the Cabinet, EVP V.Dombrovskis
25 Oct	General situation in European PV manufacturing industry	DG Trade
25 Oct	Solar PV Manufacturing Package	Member of the Cabinet, EVP M.Šefčovič
27 Oct	Discussion on endorsement of the Resilience document	DG Internal market, DG Grow
10 Nov	DG GROW - SPE - ESMC coordination	DG Grow, SolarPower Europe
13 Nov	ESIA	ESIA Steering Committee
14 Nov	Discussion on available industry data	DG Trade
16 Nov	EU - U.S. TTC Working Group	DG Internal market
17 Nov	ESIA Supply Chain WG	PV Industry representatives
21 Nov	ESIA	ESIA Steering Committee
1 Dec	Ministerial Meeting	Member States representatives, PV Industry representatives
8 Dec	ESIA Supply Chain WG	PV Industry representatives
11 Dec	InvestEU Advisory framework	European Investment Bank
20 Dec	ESIA	ESIA Steering Committee
10 Jan	Emergency (safeguard) measures for EU PV module manufacturers	DG Trade
12 Jan	ESIA	ESIA Steering Committee
17 Jan	Antimony in solar glass ban in EcoDesign legislation	DG Grow, PV Industry representatives
18 Jan	Emergency measures for EU PV module manufacturers	Member of the Cabinet, EVP M.Šefčovič
19 Jan	Key emergency measures for European PV manufacturing	DG Grow, PV Industry representatives

22 Jan	EcoDesign and Energy Label for PV modules	DG Grow, PV Industry representatives
22 Jan	ESIA Forced Labour Task Force	PV Industry representatives
23 Jan	Social Sustainability issues in the PV manufacturing Industry	Business and Human Rights Resource Centre
25 Jan	Potential emergency measures	Members of the European Parliament
25 Jan	ESIA Finance WG	PV Industry representatives
26 Jan	ESIA Supply Chain WG	PV Industry representatives
30 Jan	EIB financing frameworks and PV manufacturing projects	European Investment Bank, ESIA Steering Committee
1 Feb	ESIA Forced Labour Task Force	PV Industry representatives
2 Feb	Emergency measures for the EU PV module manufacturers	Head of the Cabinet, EVP V.Dombrovskis
2 Feb	ESIA	ESIA Steering Committee
7 Feb	Emergency measures for European PV manufacturing	DG Energy, DG Grow
9 Feb	State aid changes for OPEX financing	Head of the Cabinet, EVP V.Dombrovskis
9 Feb	Emergency (safeguard) measures for European PV manufacturing	Members of the Cabinet, EVP M.Vestager
9 Feb	Emergency (safeguard) measures for European PV manufacturing	DG Energy
12 Feb	Recyclability index, stakeholder meeting	DG Grow
12 Feb	Uyghur forced labour	Investors Alliance, Anti-Slavery International
12 Feb	ESIA	ESIA Steering Committee
14 Feb	Emergency (safeguard) measures for European PV manufacturing	Member of the Cabinet, President U. von der Leyen
15 Feb	Emergency measures for European PV manufacturing	DG Energy, DG Grow
15 Feb	ESIA Forced Labour Task Force	PV Industry representatives
15 Feb	Emergency measures for European PV manufacturing	Head of the Cabinet of Kadri Simson
15 Feb	The process of trialogues on the Forced Labour legislation	Office of MEP Maria-Manuel Leitao-Marques
16 Feb	ESIA Supply Chain WG	PV Industry representatives
19 Feb	Emergency measures for European PV manufacturing	Member of the Cabinet, EVP M.Šefčovič
23 Feb	The process of trialogues on the Forced Labour legislation	Political Advisor International Trade to MEP Jörgen Warborn
26 Feb	ESIA Supply Chain WG	PV Industry representatives
26 Feb	Net-Zero Industry Act	DG Grow
29 Feb	ESIA Demand side WG	PV Industry representatives
1 Mar	ESIA	ESIA Steering Committee
4 Mar	Ministerial working lunch on the state of the solar sector in Europe	EU Energy Ministers, Belgian Ministry, Commissioner for Energy
5 Mar	Dutch Public Buyer Group for Sustainable PV	Dutch public procurement agency, PIANOO
5 Mar	Sustainability criteria	Swedish public procurement agency
5 Mar	Emergency measures for EU PV manufacturing	Ministry for Industry and Energy, France



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