

## Fourth Meeting of the Regional Committee for Europe and the Others Region

21 - 23 June 2023

Brussels, Belgium

### Thematic Side Event 2: Concept Note

#### Private - Public Sector Roundtable on Solar Manufacturing

23 June 2023: 9:00 - 10:30 hours CEST

Registration: [https://isolaralliance.org/registration/RegionalCommittee\\_EO\\_SER](https://isolaralliance.org/registration/RegionalCommittee_EO_SER)

Title	Private- Public Sector Roundtable on Solar Manufacturing
<b>Day 2: Friday, 23 June 2023</b>	
<b>Context</b>	<p>The global cumulative installed capacity reached close to 1.2 TW in 2022, with around 175 GW of solar PV capacity installed globally in 2021, &amp; nearly 240 GW in 2022, with 23 countries installing more than 1 GW. In the last two years, the global PV market grew 64%, despite the turmoil created by the COVID-19 pandemic, such as price and delivery tensions on the supply chain.</p> <p>The solar PV market remained robust despite recent price shocks and delivery delays, while the leadership shifted from Europe to Asia in the last decade, especially China. At all steps of the solar PV value chain, production is largely focused in China, with:</p> <ul style="list-style-type: none"> <li>• 79% of polysilicon production</li> <li>• 99% of ingot/wafering</li> <li>• 86% of cell production</li> <li>• 80% of module production</li> </ul> <p>The extreme concentration of the solar PV supply chain presents multiple risks, geopolitical and economic. The development of local solar PV manufacturing across the globe would bring advantages to the entire sector, from end customers to project developers as well as public authorities. Furthermore, to achieve net zero targets, up to 1900 GW per year must be manufactured by 2030 (as per the “ambitious” scenario in ISA’s report on Building Resilient Solar Supply Chains). Therefore, it is imperative that other regions (re-)build their solar manufacturing supply chains. This increased demand growth also creates tremendous opportunities for local PV manufacturing.</p> <p>But the road to a more diversified and more resilient global solar PV supply chain remains full of obstacles. Firstly, investments on the order of \$150B globally which will be needed to develop the hundreds of GW of production capacities required along the value chain. Therefore, creating the conditions to unlock financing will be a major consideration for decision-makers. Secondly, the labour needs associated with the estimated production capacities’ expansions, particularly skilled labour, must be met. Thirdly, the availability and affordability of solar manufacturing equipment must be increased. To overcome these obstacles, Decision makers need to design holistic national strategies for solar PV, targeting both upstream and downstream parts of the value chain with specific measures with inputs from all stakeholders.</p>
<b>Key focus area</b>	<p>This workshop will have a presentation by Becquerel Institute on the ISA report “Building Resilient Global Solar Supply Chain” report &amp; present recommendations on how solar supply chains can be (re-)developed, with a particular focus on Europe &amp; Other Regions.</p>

<b>Objectives</b>	The ISA will lead a roundtable discussion for feedback on how to boost solar manufacturing in these regions. This workshop is designed to bring together policymakers, manufacturers, civil society organizations to discuss how solar supply chains can be developed, especially in developing countries, including what specific policy measures are required. It will help build linkages among countries to help aggregate demand & identify which countries are best suited for which steps of the supply chain.
<b>Partners</b>	SolarPower Europe Becquerel Institute
<b>Time and venue</b>	9:00 - 10:30 hours CEST Hotel Sofitel
<b>Medium of participation</b>	In-person: Hotel Sofitel Brussels, Paul Henri Spaak I Pl. Jourdan 1, 1040 Bruxelles, Belgium Virtual: <a href="https://isolaralliance.org/registration/RegionalCommittee_EO_SER">https://isolaralliance.org/registration/RegionalCommittee_EO_SER</a>
<b>Time (in CEST)</b>	<b>Agenda</b>
<b>09:00 - 10:30 hours</b>	<b>The side event will be for 90 minutes.</b>
09:00 - 09:05 hours	Official Welcome by Dr Mathur, DG, ISA
09:05 - 09:10 hours	Opening remarks by representative of the European Commission
09:10 - 09:25 hours	Presentation by Becquerel Institute on report Building Resilient Solar Supply Chains
09:25 - 10:50 hours	Panel Discussion on Solar Supply Chains <b>Moderator:</b> Dries Acke, SolarPower Europe <b>Panel members</b> <ul style="list-style-type: none"> <li>• Representative from First Solar (TBC)</li> <li>• Zygimantas Vacianas, ESMC (TBC)</li> <li>• Ruso Eliano, Enel (virtual)</li> <li>• Filiz Aktaş, Smart Solar</li> <li>• Representative from Solarge (TBC)</li> </ul>
10:25 - 10:30 hours	Summary and Closing Remarks by Alexander Hogeveen Rutter, ISA



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