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Solar is ‘Freedom Energy’ – Unless We Depend on Autocracies for the Technology!

The need to counter China’s dominance of solar manufacturing with a durable solar industrial policy is now more urgent than ever and does not seem lost on the European Commission. In fact, the European Commissioner for Energy, Kadri Simson, said earlier this year that the Commission would do “whatever it takes” to bring solar manufacturing back to Europe. We already have the technology and innovation needed to rapidly build the EU’s manufacturing capacity. What’s missing is the combination of trade and industrial policy necessary to level the playing field for domestic manufacturers while incentivising manufacturing. Given the right policies, Europe can rapidly become self-sufficient in solar panels. How rapidly? There are few better examples of how comprehensive policy, including trade safeguards, manufacturing incentives, and tangible clean energy goals, can spur domestic manufacturing than India. Today, India is looking at 50 gigawatts of new module capacity expected to come online by 2025. That’s twice as much as the capacity of solar modules installed across all 27 EU member states in 2021.

This is a direct result of the effective combination of tariff and non-tariff barriers, the Indian government’s ‘Production Linked Incentive Scheme’ for domestic manufacturing, and government clean energy targets that would see 25 gigawatts of new capacity deployed every year until the end of this decade. India’s approach is clearly working and is one that Europe and the US can learn from. The bind that democracies find themselves in today is arguably the result of decades of consistently shortsighted decision-making that squandered opportunities to build self-reliance. As the aftermath of the Russian attack on Ukraine has demonstrated, building independent energy supply chains after the fact, in a hurry, is not a good option. Europe’s leaders must face the risks and vulnerabilities in our renewable energy supply chains, act decisively, and ensure we do not repeat the same mistakes. Solar energy is “freedom energy” only if the supply of technology that converts photons into electrons renders democratic nations free to pursue policies that reflect our values and principles – without authoritarian influence. ■

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