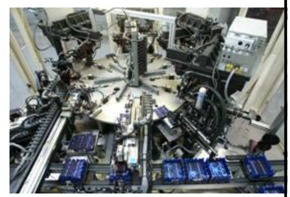


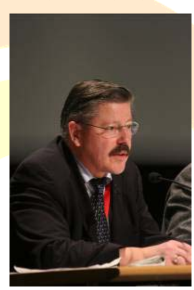
The strength of a single voice

Michel Viaud
General Secretary

WHO is EPIA?

- Exists since 1985
- 86 members: 72 full + 14 associate
- 72 full members : manufacturers on the overall value chain
- Budget 2006: 1.700.000 € (EC 1/3 + 2/3 members and other incomes)
- Secretariat in Brussels
- 8 Board members elected for 4 years
- President for the next two years:

2006-2007 Dr. Winfried Hoffmann



ABCDE: ASEAN-EU ENERGY COOPERATION NETWORKING FOR PRIVATE SECTOR – 12 July 2006, REH, Brussels

EPIA and its members

EPIA represents **95% of the photovoltaic European industry**,

and 80% of the Global photovoltaic industry

- Silicon feedstock: **Wacker …**
- Wafers and Ingots: **Crystalox, Scanwafer, Pillar, Podolsky, PV Silicon …**
- Cells: **Q-Cells, BP Solar, Isofoton, Shell Solar, SolarWorld ,…**
- Modules: **aleo, Schott Solar, Photowatt, Photovoltech…**
- Systems: **Tenesol, Naps Systems, Conergy, Phoenix,…**
- Inverters: **KACO, SMA, Sputnik, Sunways, Fronius…**
- Cabling: **Multi-contact…**

EPIA and its strategy

2003-2006 Strategy

Market oriented taking in account:

- all technological aspects
- cost reduction
- competitiveness

2003-2006 Strategy - **Mission statement**

“EPIA exists to deliver a distinct and valuable service driven from **the strength of a single voice**.”

2003-2006 Strategy - **Objectives**

EPIA has 3 objectives:

1. Become the most credible reference point for the PV Industry stakeholders
2. Help shape the development of new PV markets
3. Take the lead in positioning the photovoltaic industry within the European political context

2003-2006 Strategy - **Action fields**

To reach the 3 objectives, the EPIA strategic plan focuses on 3 action fields:

1. Market growth strategy
2. Products and services
3. Lobbying

Budget 2003-2006: 3 Million €

2003-2006 strategy - **results**

- The EPIA "*credible voice*" established but still needs improvement and greater external visibility
- The sector still needs a "market oriented" strategy
- The EPIA methodology of work is proven as effective and efficient
- Lack of external communication

EPIA current situation

– The results of the 2003-2006 strategy demonstrates the needs for a **continuity** and greater **visibility**

– PV Technology Platform: **a new EC tool** which has to be leaded by the Industry

– Some topics require now **partnerships** (ARE, BIPV, GPSC)

The new 2006-2010 Strategy

Framework

- "Market oriented" strategy will be based on 4 pillars: **Competitiveness, Innovation, Quality and Promotion**
- The EU PV Technology Platform is a new tool which must be integrated inside the EPIA Strategy to facilitate discussion with the **stakeholders**
- Some topics needs to be treated in **partnership** (International dimension, Rural Electrification, BIPV)

EPIA objective

In 2010, 7 million European families will produce clean and sustainable solar electricity.

(This corresponds to 2.7 GW newly installed systems per annum in 2010,

In a global market corresponding to 5.4 GW per annum in 2010)

The Action Plan

4 Pillars:

- Competitiveness
- Innovation
- Quality
- Promotion

The Action Plan (1)

1. Competitiveness

Objective: Mass production for cost reduction (1 to 1,5 € per W in 2012)

- EU Market (Topics: Enlarging market, socio-economic issues, industry policy, Tools: WG1 and WG2 PV Platform)
- Developing Countries (Topics: Rural electrification, Tools: Alliance for Rural Electification, WG4 PV Platform, IEA-PVPS)
- Other global markets (Topics: statistics and follow-up, Tools: GPSC, EPIA)

The Action Plan (2)

2. Innovation

Objective: Financing PV R&D in the FP7 (60 millions € / year) and globally in Europe (250 millions € / year)

- R&D (Topic: Dialogue with the R&D community, EPIA Roadmap, Tool: WG3 PV Platform, EPIA)
- BIPV (Topic: Products and market development, Tool: WG2 PV Platform, cooperation with the Construction Platform)
- Hybrid (Topic: Cooperation with other RES, Tool: Alliance for Rural Electrification, WG3 and WG4 PV technology Platform)

The Action Plan (3)

3. Quality

Objective: Demonstrate that the PV Industry can improve its image by taking greater responsibility for the well-being of the Society

- Performance (Topics: Pre-normative standardisation, standardisation, certification, guaranty and warranty, Tools: IEA-PVPS, EPIA)
- EHS (Topics: Waste and recycling, externalities, Tools: IEA-PVPS, WG2 PV Platform, EPIA)

The Action Plan (4)

4. Promotion

Objective: Improving EPIA as a visible « credible voice »

- Communication (Internal and external)
- Lobbying (National, European and International with GPSC)

Budget – Breakdown costs

Fixed costs **50%**
(Wages, office rent, etc…)

Policy **30%**
(Competitiveness, Innovation and Quality)

Promotion **20%**

4 Years budget: 10 million Euros

Partnerships

Memberships

- EREC
- IEA-PVPS
- CEFIC
- PV GAP
- ARE

Partnerships

- National PV associations
- National Energy Agencies
- SEMI
- European Organisations
- World Bank
- UNEP/UNDP

New headquarters in the heart of Brussels

Renewable Energy House
Rue d'Arlon 63-65
1040 Brussels
Belgium

www.epia.org

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