

# SEVENTH MEETING OF THE ISA REGIONAL COMMITTEE FOR EUROPE AND THE OTHERS REGION

10 - 12 JUNE 2026 | BRUSSELS, BELGIUM



## Building Diversified and Resilient Solar Value Chains: Europe and ISA Perspectives

11 June 2026, 10:45 – 12:15 Hours | Brussels, Belgium

### BACKGROUND

Over the last decade, solar photovoltaics have emerged as the backbone of the global clean energy transition, with cumulative installed capacity approaching 3 TW by the end of 2025. As deployment accelerates globally, the focus is increasingly shifting from capacity addition alone toward building diversified and resilient solar value chains capable of supporting long-term energy security, industrial competitiveness, and sustainable growth.

Recent geopolitical developments, including instability in West Asia and vulnerabilities linked to strategic trade routes such as the Strait of Hormuz, have further exposed the risks associated with concentrated industrial dependencies and supply chain disruptions. In this context, resilient and geographically diversified solar value chains are becoming a strategic priority for governments and industry alike.

As solar PV becomes central to future energy systems, resilient and geographically diversified solar manufacturing ecosystems are increasingly emerging as strategic priorities for governments and industry alike. Beyond deployment targets, countries are now focusing on trusted manufacturing partnerships, stable access to critical equipment and materials, lifecycle sustainability, circularity, and long-term industrial reliability across the solar value chain. For India, solar PV manufacturing has expanded rapidly, with cumulative module manufacturing capacity reaching approximately 210 GW and solar cell manufacturing capacity around 27 GW by the end of 2025. This creates a strong foundation for integrated manufacturing partnerships, technology transfer, and joint ventures across the solar value chain. At the same time, the global solar manufacturing ecosystem continues to remain highly concentrated in upstream segments such as wafers, ingots, polysilicon, and critical manufacturing equipment. This concentration has intensified discussions around industrial resilience, strategic autonomy, and trusted supply chain partnerships.

During the CEO Caucus organized under the Sixth Meeting of the ISA Regional Committee for Europe and the Others Region, stakeholders emphasized that diversified and resilient solar value chains cannot be built by regions acting in isolation. Discussions highlighted the need for stronger international cooperation, long-term policy certainty, aligned industrial frameworks, and sustained political leadership to accelerate resilient solar ecosystems globally. Key challenges identified included concentration of upstream manufacturing, shortages of skilled workforce, financing and de-risking gaps, limited market visibility, and insufficient industrial coordination mechanisms. European stakeholders also highlighted Europe's strengths in advanced solar technologies, high-quality manufacturing equipment, recycling and circularity, intellectual property systems, and financing instruments capable of supporting trusted industrial partnerships. (Summary attached)

Building on these discussions, the subsequent industry roundtable titled "Strengthening the Solar Manufacturing Ecosystem: From Scale to Sustainability", organized during Intersolar'26 at Gandhinagar - India, highlighted a growing disconnect between industrial ambition and commercial execution within the global solar manufacturing landscape. While Europe continues to possess technological excellence, advanced manufacturing capabilities, and strong industrial know-how, stakeholders noted that emerging markets are increasingly moving faster in deployment scale, industrial expansion, and market creation. India and several ISA member countries today represent some of the world's largest future demand centers for solar PV and storage, with growing willingness to invest in quality-driven and resilient manufacturing ecosystems. The discussions underscored that the challenge

is no longer whether diversified solar value chains are necessary, but whether industrial partnerships, financing mechanisms, and consortium-based delivery models can evolve at the speed and scale required by rapidly growing markets. In this context, Europe's future relevance within the next global solar industrial cycle may increasingly depend on its ability to transition from policy ambition toward coordinated industrial execution.

The consultations collectively reinforced that diversification cannot remain solely a policy aspiration or strategic narrative. Building resilient solar value chains will require long-term industrial partnerships, innovative financing mechanisms, lifecycle-based procurement frameworks, circularity integration, and trusted manufacturing ecosystems capable of operating competitively at global scale. Recent European industrial policy initiatives, including the Net-Zero Industry Act and emerging industrial acceleration frameworks, reflect growing recognition within Europe that maintaining industrial competitiveness in the global clean energy transition will require stronger coordination between policy, financing, manufacturing, and international partnerships.

As global markets increasingly prioritize resilient and diversified solar manufacturing ecosystems, the International Solar Alliance is convening this high-level strategic roundtable to facilitate a focused dialogue between European policymakers, industry leaders, financial institutions, and ISA member countries on the future of diversified solar value chains and Europe's role within the next phase of global solar industrial development.

## **OBJECTIVE**

The strategic roundtable aims to:

- Explore pathways for diversified and resilient solar value chains between Europe, India, and ISA member countries;
- Discuss consortium-based industrial cooperation and co-development approaches across the solar value chain;
- Recommend policy measures to revive EU PV manufacturing competitiveness
- Identify policy, financial and industrial bottlenecks limiting trusted manufacturing ecosystems;
- Explore opportunities for upstream manufacturing collaboration, recycling ecosystems, and low-carbon solar value chains;
- Assess how Europe and India can jointly develop competitive and bankable manufacturing partnerships under emerging trade and industrial cooperation frameworks.

## **PROPOSED FORMAT**

The session will be conducted as a closed-door strategic roundtable under Chatham House Rules to encourage candid, solution-oriented, and forward-looking exchanges among policymakers, industry leaders, and other strategic stakeholders.

## **KEY THEMES**

### **1. Strategic Autonomy and Industrial Resilience**

How can diversified solar manufacturing ecosystems support long-term industrial resilience and energy transition security?

### **2. Industrial Speed and Consortium-Based Models**

How can European industrial players organize faster and more effectively to meet emerging market timelines and scale?

### **3. Financing Diversified Solar Manufacturing**

What innovative financing and export credit mechanisms are required to support trusted and geographically diversified solar supply chains? Can export credit agencies, DFIs, and blended finance models support competitive non-concentrated supply chains?

#### 4. Circularity and Competitive Advantage

How can recycling, low-carbon manufacturing, and circular economy principles strengthen future supply chains and trade alignment?

#### 5. Workforce, Technology Transfer, and Industrial Capability

How can strategic partnerships accelerate upstream manufacturing capabilities, workforce development, and industrial stabilization?

### EXPECTED OUTCOMES

The strategic roundtable is expected to contribute toward:

- Establishment of a **Europe–ISA Working group on Solar Supply Chain Diversification**;
- Development of a **turnkey European Consortium model** under the India–EU trade framework for solar manufacturing and upstream equipment partnerships;
- Exploration of innovative financing and export credit structures for trusted manufacturing ecosystems;
- Identification of pilot cooperation opportunities in upstream manufacturing, circularity, recycling, and workforce development

### AGENDA

Time (90 mins)	Agenda Item	Speaker (s)
5 mins	Opening Remarks	Mr Ashish Khanna, Director General, International Solar Alliance
5 mins	Special Remarks	Mr Walburga Hemetsberger, CEO, Solar Power Europe
15 mins	Context setting	ISA and Dalberg
60 mins	High-Level Roundtable Discussion	Participants*
3 mins	Closing Reflections	Embassy of India
2 min	Way forward	ISA

#### \*Roundtable invitees (TBC):

- Solar Power Europe
- Global Solar Council
- European Solar Manufacturing Council
- European Solar PV Industry Alliance
- European Technology and Innovation Platform for Photovoltaics (ETIP PV)
- International Renewable Energy Agency (IRENA)
- Institut Photovoltaïque d'Île-de-France (IPVF)
- French Alternative Energies and Atomic Energy Commission (CEA)
- Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ)
- Interuniversity Microelectronics Centre (IMEC)
- Fraunhofer Institute for Solar Energy Systems (Fraunhofer ISE)
- 3SUN
- TotalEnergies
- Électricité de France (EDF)
- Enel
- Meyer Burger
- ENGIE
- BayWa r.e.
- RCT Solutions
- VDMA
- Becquerel Institute
- PV Cycle

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