



EPIA Strategy Executive summary

EPIA Board & Secretariat

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EPIA strategy

Executive summary

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EPIA Strategy for the next 3 years

EPIA Objectives:

“EPIA exists to deliver to its members a distinct and valuable service driven from the strength of a single European photovoltaic (PV) voice.

EPIA has 3 objectives:

- EPIA will become the most credible reference point for the European PV Industry stakeholders. EPIA will provide accurate information, statistics and feedback to both its members and the wider audience.
- EPIA will help shape the development of new PV markets both in Europe and export community.
- EPIA will take the lead in positioning the photovoltaic industry within the European political environment and supporting the member state association in their local objectives.”

EPIA Action programme:

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

- Market development
- Products and services
- Lobbying

For the three fields, the methodology consists to create work packages, including their own tasks, budget, planning, EPIA members' commitment and external partners' cooperation (if necessary).

This strategy will be implemented for the next 3 years, with a particular attention for the first year, and will integrate the appropriate Work Package of PV Catapult proposal (if accepted by the EC).

1) Market growth strategy (EM/EL)

Objective both in Europe and in Export:

- To observe continuously and in time the market situation.
- To understand trends and evolutions.
- To support the decision-process.

Work plan:

Work package 1: Opportunities, Perspectives, Potentials, and Hurdle in the enlarged EU Market*

The objectives are to identify the opportunities, perspectives and potentials in the enlarged EU market for photovoltaic.

Barriers need to be identified and solutions (**position papers, White book, etc.**) must be promoted.

The basis is statistical information available in various **EU countries** to analyse national **PV situation and profiles**.

Work package 2: Export in developing countries and other OECD countries*

The objectives are to identify the opportunities, perspectives and potentials in the off-grid market in developing countries but also on-grid solutions in non-EU OECD countries (e.g. USA). **Regional market profiles and position papers** could be produced.

In the off-grid market in developing countries, an export strategy must be defined (e.g. EREC position paper on Mediterranean countries).

Therefore different kind of PV system types are necessary to meet the demand, e.g. mini-grids to supply villages, Solar Home Systems, and hybrid systems which might include a combination of PV generator, hydro generator, biogas, Wind converter and/or Diesel generator.

On-grid solutions in non-EU OECD countries (e.g. USA) an offensive export strategy could be defined to compete on solvent and vast markets.

Work package 3: Socio-economic and financial issues*

The current price situation, coupled with information on market trends and on expected price decreases will lead to a forecast of the future markets.

A new range of investment and financing products need to be urgently developed for the solar electricity sector specificity (these will include private equity, venture capital, ESCOs, etc), coupled with international and bilateral lending bodies (such as the World Bank, IFC etc), as well as Export Credit Agencies (ECAs) .

Work package 4: State-of-the-Art & SWOT Analysis*

The objectives are to generate a variety of strategies to identify alternative ways that the PV branch can use its specific strengths to capitalize on opportunities or to avoid threats and to overcome its weaknesses. The so-called SWOT analysis provides a matrix illustrating how businesses can match the external opportunities and threats facing the sector with its internal strengths and weaknesses to yield in possible strategic alternatives. This method lends itself to brainstorming to create alternative strategies, which might not otherwise be considered. Through workshops final results will be discussed within an expert group.

* PV Catapult project

2) Products and services (SB/AM)

Objective:

- To provide internally and externally accurate data and information
- To develop a credible and reliable EPIA voice
- To supply an efficient communication action

Work plan:

Work package 1: Crystallizing the fruits of the European RTD *

Numerous research activities in the field of PV technology were undertaken and many are still on their way. The **EPIA Roadmap** and the project PV EC-Net provide valuable input about these research activities. The objective of this work package is to analyse the usual time needed for transfers in the past and to develop strategies to accelerate this process in the future.

Work package 2: Engaging the Construction Industry in PV*

The integration of PV in buildings (BIPV) presents a major market potential in Europe. To increase market share it is necessary to engage the construction industry in PV. This project will enhance **interaction between PV industry and construction industry** towards future innovative products and concepts.

Work package 3: Communication tools*

Permanent internal and external tools must be developed and ensured as:

- EPIA companies profiles
- Web site
- Press release and appropriated dissemination
- Solaris newsletter

Work package 4: Costs and prices trends

The EPIA members and the stakeholders need to have periodically the trends concerning various (from feedstock to systems) PV costs and prices.

This could be the object of a periodical **publication**.

Work package 5: Certification and standards

PV GAP was established by the three Industry Associations (EPIA, JEMA and SEIA) and is supported by the World Bank, UNDP and other organizations. The purpose of the formation of PV GAP was to create a simple recognition of quality PV products, a Quality “Mark” for PV components and a Quality “Seal” for PV systems.

The objective will consist to define the best **conditions for EPIA members to get the certification** and to promote it to the general audience and to try to oblige it in the public call for tenders.

* PV Catapult project

3) Lobbying action areas (WH/MC)

Objective:

To influence the “political” decision process at the national, European and international level:

- At the national level, to reinforce the PV in the mix energy policies
- At the European level, to ensure the PV position in the various directives
- At the international level, to create a frame facilitating the PV export for the EU industry

Work plan:

Work package 1: EU institutions Lobby

The objectives consist to follow the future directive and to ensure the PV position inside but also to promote EU directives, which could participate to the EU PV development on the EU market and to export.

The main targets are the European Commission and the European Parliament.

Work package 2: National Lobby in the EU countries

The objectives consist mainly to support national organisations to develop the PV in the national energy policies but also, consequently, to create, inside national governments, a favourable economical and social opinion of the PV to reinforce the European PV position.

Work package 3: Worldwide institutions Lobby

GEF, World bank, EBRD, etc. have energy policies for developing countries.

The objective will consist to promote the European PV industry to access in these worldwide programmes.

4) Coordination and management (EPIA Board and Secretariat)

Work package 1: Realization of Cross Fertilisation Potentials*

The aim of this work package is to actively promote the exchanges between the working groups as a means of boosting synergy effects and achieving an enlargement of the input being generated for individual topics.

Work package 2: Management of the strategy*

Financial, planning, secretariat, logistic, progress and achievement will be lead by the EPIA Secretariat under the Board control.

Each Work package will be chaired and lead by an EPIA (full or associate) member, opened to the other EPIA members and to relevant external partners.

Work package 3: Current activities

General representation, general accounting and audit, general expenses management, subscriptions, Board and AGM meetings, EPIA events, Secretariat travel & subsistence, miscellaneous will be lead by the EPIA Secretariat under the Board control.

* PV Catapult project

ORGANISATION

1) Board Members responsible and EPIA members leading WP

Market growth strategy (EM/EL)

Work package	Board member responsible	WP Leader
Work package 1	EM	WUT + (EPIA)
Work package 2	EL	FONDEM
Work package 3	EM	LIFE
Work package 4	EL	WIP

Products and services (SB/AM)

Work package	Board member leader	WP Leader
Work package 1	SB	ECN
Work package 2	AM	ECOFYS
Work package 3	SB	WSTTBC
Work package 4	AM	(Fraunhofer Institute)
Work package 5	MC	(GENEC)

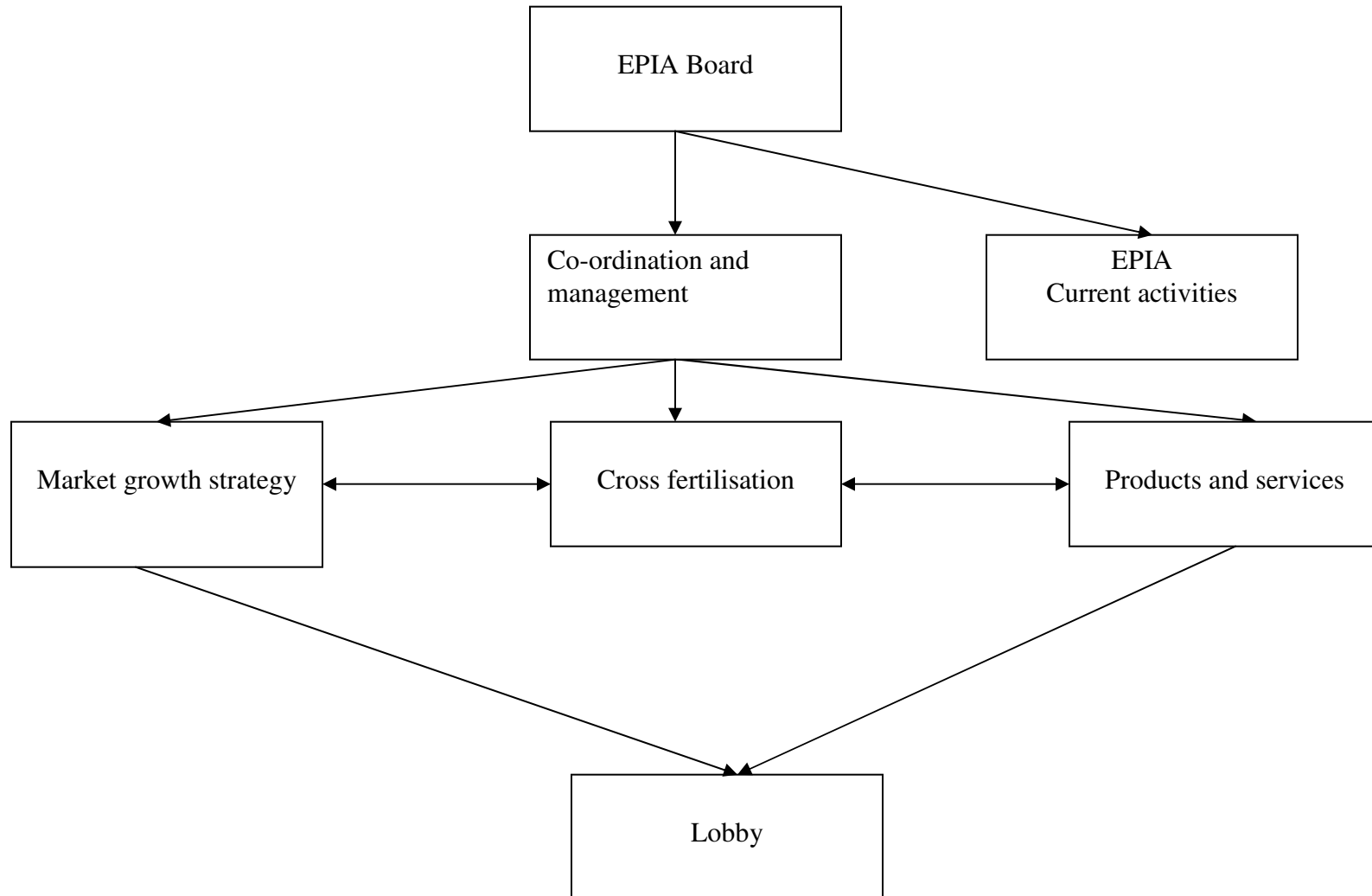
Lobbying action areas (WH/MC)

Work package	Board member leader	WP Leader
Work package 1	WH	(TEAM)
Work package 2	MC	(EPIA)
Work package 3	WH	(IT Power)

Coordination and management (EPIA Board and Secretariat)

Work package	Board member leader	WP Leader
Work package 1	(EM)	WIP
Work package 2	EM	EPIA
Work package 3	(EM)	EPIA

2) Organisation scheme



3) List of Members and Partners already involved in PV Catapult

EPIA, Belgium	<i>KOSOLCO, Germany</i>
WIP, Germany	LIFE, Italy
ADEME, France	FONDEM, France
ANIT, Italy	<i>Murphy&Spitz, Germany</i>
APE, Slovenia	NAPS, Finland
BP Solar, Spain	<i>PA ENERGY, Denmark</i>
<i>BJ CONSULTANT, France</i>	PHILIPS, The Netherlands
<i>CRES, Greece</i>	PHOENIX, Germany
ECOFYS, The Netherlands	PHOTOWATT, France
ECN, The Netherlands	<i>PHOTOVOLTEC, Belgium</i>
ENGCOTEC, Germany	PV SILICON, Germany
FREE ENERGY EUROPE, The Nether.	<i>SARASIN, Switzerland</i>
GENEC, France	<i>SOLART, Hungary</i>
<i>HAMMER AG, Germany</i>	<i>SOLATEC, Czech Republic</i>
<i>IPA SA, Romania</i>	<i>WUT, Poland</i>
ISOFOTON, Spain	WSSTBC, Belgium
ISOVOLTA, Austria	<i>ZED factory, United Kingdom</i>
IT POWER, United Kingdom	<i>Oeko-Invest, Austria</i>