Expanding U.S. Solar Manufacturing Leadership

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- Solar energy and national security
- Industrial policy and the Inflation Reduction Act
- Friends and allies
- Restoring balance
- 100 GW of solar manufacturing capacity by 2030

Solar Energy and National Security

Energy security is national security

Domestic solar manufacturing = energy resiliency

The industry needs to adjust its policy priorities



Image: Wacker Chemie

Industrial Policy and the Inflation Reduction Act



Image: Nevados Engineering

- Strategic state and federal investments designed to grow America's economy, strengthen national security, and reduce carbon emissions
- Technology leadership today
- Anchoring communities and the jobs multiplier
- Technology and the factory floor





Friends and Allies

European manufacturing equipment

• Indian inputs and finished goods

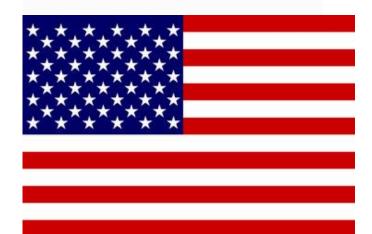
Export opportunities and alleviating energy poverty

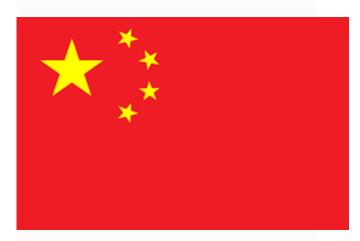
Restoring Balance

Mutual respect and win-win competition

Growing vulnerability of bifurcation

Reasonable guardrails on foreign government competition





100 GW of Solar Manufacturing Capacity by 2030



Image: Priefert Steel

- American solar energy independence
- All key segments must be healthy
- Deployment is no longer the sole objective
- Cleaner solar supply chains

Thank you

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