

Results of EU survey PV-installers

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84 % of European photovoltaic installers consider a solar industry producing in Europe in the future as very important (**69%**) or important (**15%**). Only **12%** of installers think that such an industry is totally unimportant (**7%**) or unimportant (**5%**).

66% of the installers in the 27 member states consider the European Commission's investigation as justified which follows the anti-dumping complaint. Just **16%** see no justification for the complaint against price dumping and unjustified subsidies in the area of solar modules, cells, wafers and glass. **15%** cannot judge it from their current perspective.

The proportion of labour cost in the solar production has a share between seven and ten percent globally. Still, installers in Europe can buy Chinese solar modules significantly cheaper than those of the European competitors. Regarding the reasons for this price advantage, **68 %** of those questioned name governmental subsidies, of which Chinese companies benefit. **65%** of the installers think that Chinese manufacturers have to fulfill less regulatory conditions at the production sites than in Europeans. **63%** presume that Chinese companies have better access to new capital, whereas **60%** believe that lower energy prices are the reason.

The questioned installers do not agree that the price advantage of Chinese producers has its origins in better production facilities or more efficient research and development. **60%** do not see advantages in research and development and **57%** do not consider the Chinese's production facilities as more modern than European ones.

If the European Commission decided in July that price dumping and unjustified subsidies are responsible for a competitive distortion, **65%** of the installers consider possible measures such as protective tariffs as adequate. **18%** appeal against protective tariffs whereas **13%** cannot judge the situation.

The reactions to possible measures of the European Commission turn out considerably different. With **57%**, the majority do not expect any immediate effects on their business. If protective tariffs were implemented, **15%** of the installers would change their product range

and increase the use of non-Chinese modules. **7%** would pursue another strategy and try to reduce the purchase price of other components such as inverters and mounting systems. More drastic measures, such as the dismissal of employees, would affect **10%**. Only **5%** of those questioned see the danger of having to shut down their company.

Europressdienst called 2303 photovoltaic installers between March 4th and March 18th in the 27 member states of the European Union; 532 participated in the survey. The number of questioned companies is proportional to the capacity of the newly installed PV systems in 2012. Most installers were questioned in the biggest European markets Germany, Italy and France. All in all, the participating companies installed 1,1 GWp during the last years. 2012, photovoltaic systems with an overall capacity of 16,5 GWp were installed. Experts estimate that the share of thin-film systems is about **8%**. The rest, 15,2 GWp, are crystalline module.