

The Ascent of China in the Si Photovoltaic Market

A hand is holding a blue silicon wafer. Overlaid on the wafer is a white map of China. The background of the entire image is a grid of white lines on a blue background, representing a solar cell layout.

21st European PVSEC

PV Industry Forum

September 4-8, 2006

Dresden, Germany

Frank Haugwitz / GTZ China

Focal Point: Rural Electrification

Pilot Phase (1999-2002)

Investment: 2 Mio. €

Inner Mongolia, Gansu, Tibet

Energy Supply for 50.000 people

Township-Programme (2002-2004)

Investment: 200 Mio. €

721 Townships in 8 Provinces

Energy Supply for 400.000 people

Village-Programme Phase 1 (2006-2010)

Investment: 3.2 Billion €

10.000 to 15.000 Villages

3.5 Mio. Households (incl. small-hydro) **gtz**

**Brightness
Programme**
1996 – 2010

Status: BIPV / Roof-Top

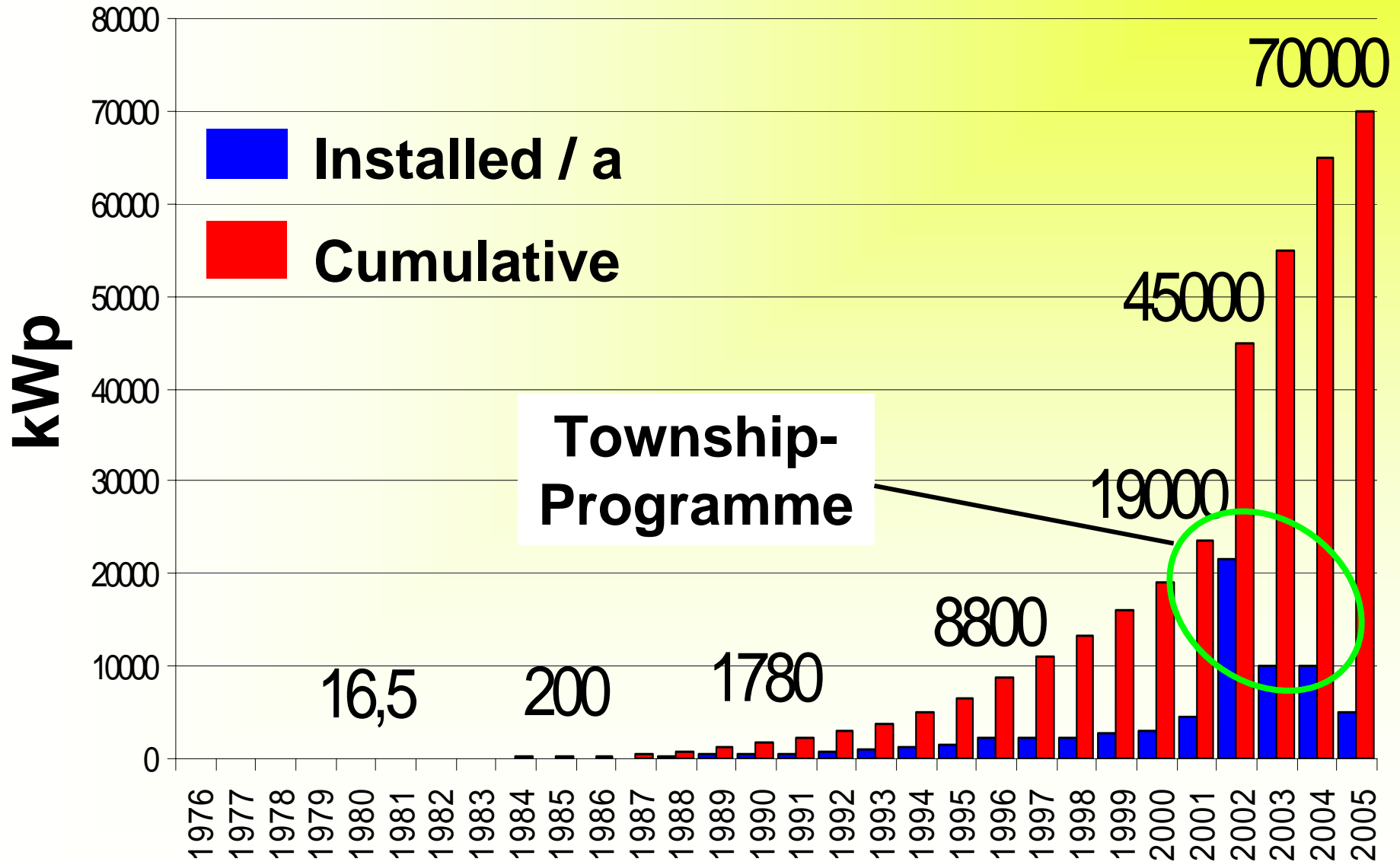
Demonstration Systems (e.g. Beijing, Shenzhen)

In total approx. 3 MWp installed!

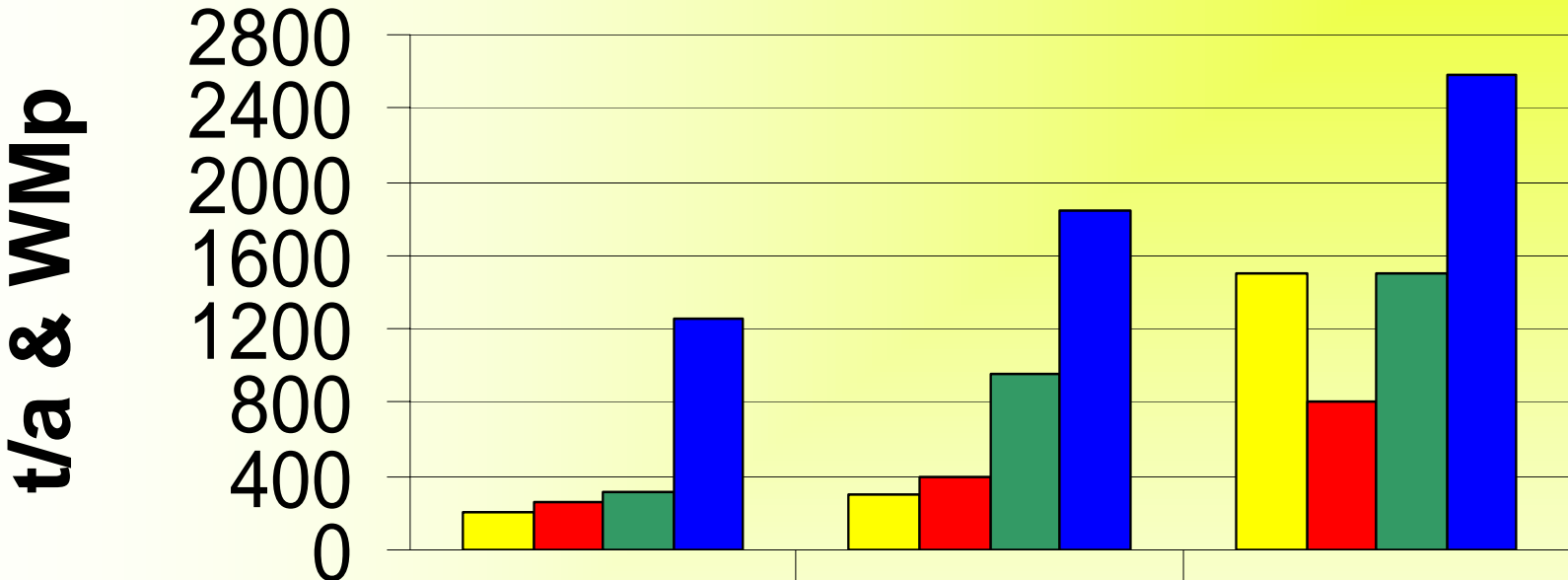
BIPV & Roof-Top Systems in Beijing



Installed PV-Capacity 1976-2005



PV-Industry Development 2005-2007



	2005	2006	2007
■ Silicon t/a	200	300	1500
■ Wafer (MW)	260	400	800
■ Cells (MW)	320	960	1500
■ Modules (MW)	1250	1850	2580

Future Drivers

Legislative Framework Conditions & Targets

- January 2006 RE-Promotion Law came into effect
- State Council established RE Development Fund
- National Energy Law under preparation
- Long-term target: 2 GW by 2020 to be installed

Regional Initiatives, Conference, Major Events

- By Law Shenzhen mandates SWH in 12Fl. Bldg.
- 2005-2007 Shanghai 100.000 Roof-Programme
- Sept. 2007 World Conf. on Solar Energy - Beijing
- August 2008 Olympic Games - Beijing
- 2010 Expo - Shanghai

Resümee and Perspectives

- Targets, Programmes & Investments confirms the political commitment to promote the utilization of PV
- Present Focus on Rural Electrification will in the mid-term be replaced by grid-connected applications
- Made in China / Made by China: More R&D
- Quality Assurance is high on the agenda
- Adjustment of RE-Law (Feed-in-Tariff/Quotas) could trigger a greater domestic market demand
- Expansion plans of PV-Industry are based on strong export orientation - recent acquisition of MSK !



Thank you for your attention !

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