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Photonic convergence: Earnings season, China PV heebee geebies, CIGS gets Time nod, and more

11 November 2008 | By [Tom Cheyney](#) | [Chip Shots](#)

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After a week-plus away from the blog, mainly because of print deadlines, family passings, and a certain minor electoral contest here in the States (cue up Sam Cooke's "A Change is Gonna Come" here), I'm back with a few tidbits of solar photonic convergence.

The flowers and weeds of the quarterly earnings season for publicly traded companies are in full bloom. Barclay Capital's Vishal Shah "Solar Energy Potential Catalyst Calendar" counts 17 announcements this week and another six next week, and his list doesn't include Applied Materials, Solar Power Inc. (not to be confused with Solar Power Industries, the other SPI), DayStar, or Day4Energy, and probably more.

Some of the biggies' and wannabes' balance sheets due for perusal and heinous overanalysis over the next couple of weeks include ersol, aleo, and centrotherm among those that refuse to capitalize the first letter of their company names, Q-Cells, Solon, Conergy, and Phoenix Solar representing Team Germany, and Suntech, Yingli, and JA Solar pushing forward into a glorious future for the Photovoltaic Republic of China.

But it's not a very glorious present for certain PRC companies, if we are to believe a new research report, discussed in [Monday's Tech Trader Daily blog at Barron's online](#). His TechTraderness Eric Savitz shares details of the latest broadside, er, analysis from Wedge MKI, the research arm (and leg if you're paying for it) of Hong Kong-based Wedge Partners.

Here are some bits. Suntech is "quietly laying off about 10% of its 10,000 employees, and has idled half its production lines" and has "put on ice" its capacity expansion plans for growth from 700 MW to 1.2 GW by the end of the year. As for JA Solar, half of its production lines have been closed down, according to the report, and "customer orders are "drastically down" and the company has "large volumes of inventory which will ultimately have to be sold at much-reduced prices."

Yingli and Trina Solar have put off hundreds of megawatts of planned capacity expansion, and Canadian Solar (one of the more peculiarly named essentially Chinese companies) may have slowed work on its polysilicon ingot plant, according to the Wedgesters.

Is the sky really falling on several of the Chinese heavyweight solar players, or might there be a hidden agenda here? None of the companies' sides of their stories are presented in the blog (not unusual), and among the comments posted in response to the piece is one that claims that "firms like Wedge partners serve clients who are short sellers (f#@* +&s!). You fail to mention that. You become an unsuspecting part of the scheme to bad mouth companies." The screen name of the commenter? "Anonymous," of course.

One company whose name may one day become an antonym for anonymous is Nanosolar, champions of printed copper-indium-gallium-(di)selenide thin-film PV. CEO Martin Roscheisen has been among the highest profile CIGS execs, both because of his penchant for publicity and raising copious investment funds (and industry colleagues' hackles). [Nano's naming as number 25 on Time magazine's list](#) of the 50 "Best Inventions of 2008" (sandwiched between bionic contact lenses and the Speedo LZR Racer swimsuit) does nothing to dampen the hype.

With a photo of Martin manhandling a full PV panel on his shoulder (I assume it's a Nano module, though probably not the one offered on eBay last year), the blurb gushes that "while silicon panels need to be baked in batches, Nanosolar's thin-film panels roll off the assembly line, as if from a printing press."

Now if only Martin and his minions would open their doors and kimonos to certain erstwhile reporters who could confirm that Nano's secretive manufacturing operation in San Jose is actually pumping out product by the megawatt and not hyperbole by the mouthful.

Speaking of megawatts, about 400 of them, a [ballot proposition for the March 3, 2009 election](#) that could lead to increased photovoltaicism in the City of the Angels was approved unanimously by the Los Angeles City Council last week. The initiative would pave the way for the L.A. Department of Water and Power (how's that for a generic utility company name) to install thousands of panels on acres of government, commercial, and industrial rooftops around town.

The jury is still out on whether the proposition is the right kind of renewable energy public program or not, although some business and green groups' concerns were supposedly addressed in the final version voted on by the council. Given the experience around the recently defeated California Proposition 7 initiative, a poorly written boondoggle of a ballot measure opposed by almost every industry and environmental organization, just because something "promotes" solar power doesn't make it a shoo-in for approval by the electorate.

But what about something that promotes solar power in a more direct way, like cleaning the *schmutz* off of one's PV panels? Which brings me to one of my favorite new products on Planet Photovoltaica, the SolarWash automated solar-panel cleaning system from [OCS Energy](#). Touted as the first of its kind, the microprocessor-controlled glorified sprinkler system snaps onto the arrays and automatically lays down a cleaning fluidic flood over the modules' surfaces.

The company says SolarWash's return on investment is about three to five years for a system facing at least 5% degradation from grimy buildups of pigeon guano, bug guts, tree debris, and the like. The cleaning units work even better on larger, multimegawatt power arrays, adding more kilowatts to the energy flow and bottom line, courtesy of those clean modules.

After all, there's nothing worse than a dirty solar panel.

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