

# 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

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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

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- 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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