

Balancing Technology, Price, and ESG in Europe's PV Market



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Europe 2025



Current Role: Procurement Manager, Elgin Energy (Solar & BESS)

Experience: 12+ years across facility management, utilities, energy sourcing, and renewables (IPP and EPC).

Expertise: Strategic procurement, supplier engagement, stakeholder management and contract negotiation across Solar, BESS, and Wind (O&M).

Track Record:

- Delivered >300MW in solar and BESS assets across the UK
- Supporting delivery of 1.2GW across the UK and Ireland in 24 months
- Managed MSAs and framework contracts with European and Chinese suppliers
 - Worked across full turnkey and split-scope models
- Past roles: Volitalia(Solar, BESS & Onshore Wind), Fluence, ScottishPower, JLL, Equans etc

Skills: Stakeholder management, IRR-aligned sourcing, vendor audits, SLA frameworks, and ESG-led procurement

Procurement Has Grown Up



From tactical buying
to strategic
leadership

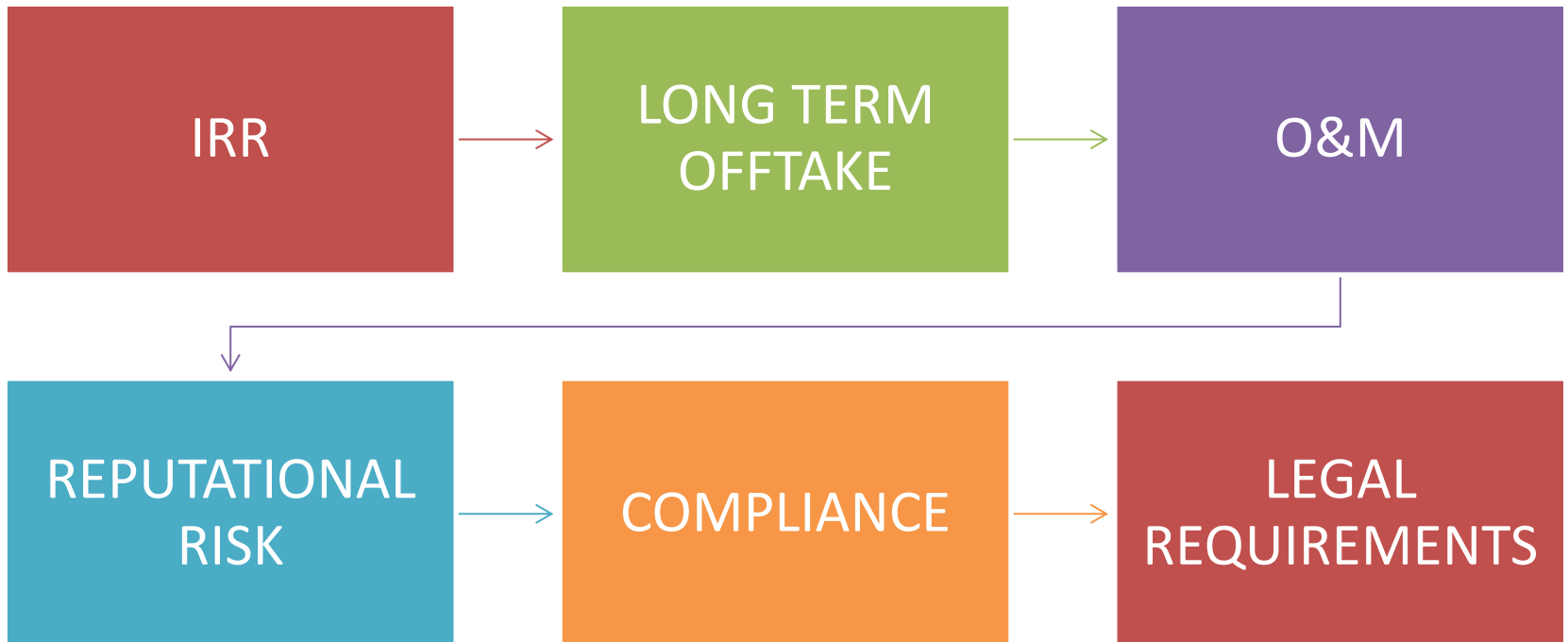


Not just picking
lowest cost, but
managing risk, ESG,
and IRR impact



Procurement now sits
at the boardroom
table

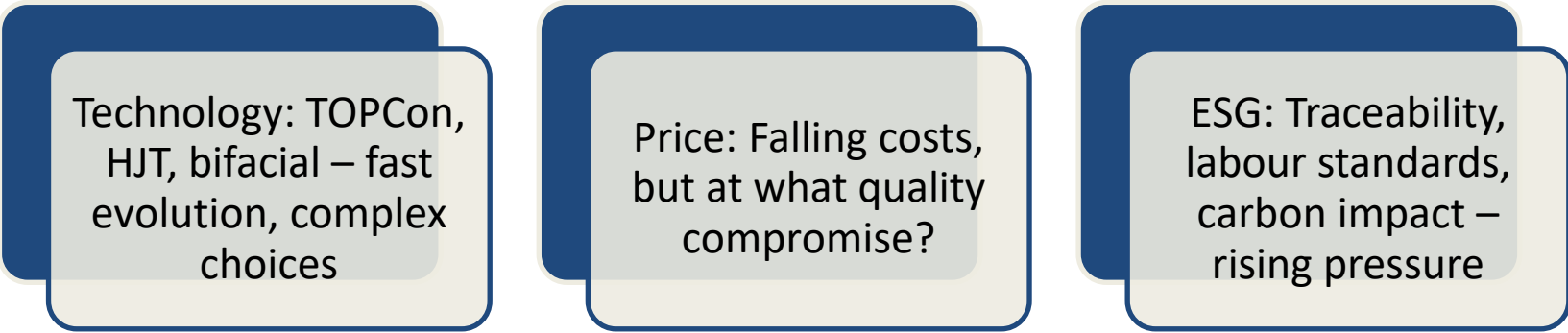
Why the Shift





The Triple Constraint

Procurement must balance, not trade off



Technology: TOPCon, HJT, bifacial – fast evolution, complex choices

The diagram illustrates the Triple Constraint in procurement. It features three overlapping boxes arranged horizontally. Each box has a dark blue top half and a light beige bottom half. The first box on the left is labeled 'Technology' and mentions 'TOPCon, HJT, bifacial' as fast-evolving technologies with complex choices. The middle box is labeled 'Price' and discusses falling costs versus quality compromise. The third box on the right is labeled 'ESG' and covers traceability, labour standards, carbon impact, and rising pressure. A solid purple horizontal line is positioned at the bottom of the slide.

Price: Falling costs, but at what quality compromise?

ESG: Traceability, labour standards, carbon impact – rising pressure

Why this is a Challenge for Buyers

01

Navigating
oversupply and
volatile pricing

02

Assessing claims
from emerging
tech players

03

Aligning internal
stakeholders
across finance,
legal, and ESG

04

Keeping
sourcing
frameworks
investor-ready

ESG



EU REGULATIONS



INVESTOR REQUIREMENTS

ESG

Balance between Investor requirements and EU regulations

Key Point: 2 layers of scrutiny. Linked not independent

- Some requirements we look out for:

- Compliance with EU regulations such as SFDR (mandate disclosure) and EU Taxonomy (Defines the criteria)
- Code of conduct, policies, management protocol etc. (Due diligence)
- Chain-of-custody documentation
- Third-party ESG audits
- Carbon disclosure must be part of supplier evaluation (Capture and measurement)



Price and Technology

What our
lenders
and off
takers are
checking



How do we stay on top
of rapid tech change?



What assurance do we
have beyond the
warranty document?



Which module suppliers
are genuinely bankable
today?



What frameworks help
align pricing with ethics?

We need clarity on long-term module performance under real-world conditions.

Price and Technology

Constant check and balance

We need clarity on long-term module performance under real world conditions.

Main Concerns

- Module pricing below €0.10/W looks attractive; but procurement must assess performance risks and warranty reliability.
- Emerging technologies (TOPCon, HJT, bifacial) require real-world data, not just spec sheets
- Stakeholders want assurance that tech decisions align with IRR models and delivery timelines.



Procurement Perspective: What We Need



Data: Field performance, degradation rates, ESG audits



Partnerships: Engage with compliance-led suppliers, not just lowest price



Internal buy-in: Empower procurement to push back where needed



Tools: Scorecards that include ESG, tech maturity, and price risk

Posing the Tough Questions

Tech: What else can you provide beyond datasheets?

ESG: How transparent is your supply chain – can you prove it?

ESG: How are you preparing for ESG regulations coming into force?

Price: How do you stand out if you're not Tier 1?

Let's Collaborate



Procurement doesn't operate in a vacuum.



Let's open the conversation between buyers, suppliers, lenders, and developers.



We want:



- More transparency in tech performance and ESG credibility



- Earlier procurement involvement in project design



- Joint problem-solving around traceability, delivery risk, and pricing pressure



Together, we move procurement from firefighting to future-proofing.

Final Thoughts

- The European PV module landscape in 2025 is shaped by intense price competition, rapid tech innovation (TOPCon, HJT, tandems, IBC), and increasing scrutiny on ESG compliance.
- Procurement professionals are no longer just negotiators—they are strategic risk managers, storytellers, and stewards of ethical value.
- How we source today shapes the energy market of tomorrow.





Any Questions



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Thank
you for
listening