

European EPC's still prominent as utility-scale solar markets move overseas

European engineering, procurement and construction contractors have built more than half of the world's solar power stations, even though less than 30% of this global capacity is in Europe^[2]. Figures released today by the authority Wiki-Solar.org^[1] show that eight of the top thirteen contractors come from Europe, led by German companies, which built 27% of the world's capacity.

"These figures show how Germany and Spain in particular are continuing to benefit from their earlier leadership in solar power deployment," says Wiki-Solar founder Philip Wolfe. "Although their home markets have now shrunk to a trickle, the expertise their companies built up in the last decade still gives them a competitive advantage in world markets today."

Top of the list, however, is the American module manufacturer First Solar, which also led the list of project developers published last week^[4]. "First Solar's strategy of vertical integration covering project development, EPC contracting through to Operations and Maintenance has proved a successful way of ensuring a sustained market for its solar modules", says Wolfe. Other contractors, which similarly produce their own modules, are Hanwha Q.Cells, SunEdison and SunPower Corporation.

The cumulative installed capacity of utility-scale^[3] power plants constructed by the leading EPC contractors at the end of 2014 was:

EPC contractor	No. of Plants	Capacity MW_{AC}
First Solar [US]	34	2,864.7
Juwi Solar [DE]	54	630.2
Enerparc [DE]	48	485.9
Activ Solar [AT] (builds projects in Ukraine)	11	468.8
Gestamp [ES]	8	401.0
Q-Cells [DE] (now: Hanwha Q.Cells)	17	400.9
SunEdison [US] (part of: MEMC)	20	378.7
Bechtel [US]	2	360.0
Fluor [US]	3	315.4
Martifer [PT]	30	311.1
Abengoa Solar [ES]	2	236.0
Belectric [DE]	19	230.4
SunPower Corporation [US]	15	215.9

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These top thirteen companies account for 20% of the capacity for which EPC contractors are identified



EPC contractors are identified against 43.7% of the operating capacity on the Wiki-Solar Database (of which these top 13 account for 20.3%). The total capacity for Project developers listed may therefore be on average up to twice that identified here.

Wiki-Solar points out that Chinese companies are under-represented on the list. This is because separate EPC contractors are seldom announced for projects in China, with the role often undertaken by the project developers' in-house construction team.

The EPC contractor is responsible for the engineering procurement and construction of the solar power plant, under a contract with the plant owner or project developer. Many EPC contractors go on to offer operation and maintenance services when the plant is in service.

T E X T E N D S

Notes for editors:

- [1] This release on the leading EPC contractors is available here:
http://wiki-solar.org/library/public/150323_Top_utility-scale_solar_EPC_contractors_Europe_and_US_lead.pdf
A longer list of top EPC contractors is available on the [Wiki-Solar website](#).
- [2] Global figures for utility-scale deployment at the end of 2014 were published earlier this month:
http://wiki-solar.org/library/public/150305_Utility-solar_2014_figures_set_multiple_records.pdf
- [3] Following an open consultation, Wiki-Solar defines 'utility-scale solar' as 4 MW_{AC} and above; see:
<http://wiki-solar.org/data/glossary/utility-scale.html>. A capacity rating of 4 MW_{AC} equates roughly to the consumption of 1,500 households in Europe.
- [4] The release on top project developers is available here:
http://wiki-solar.org/library/public/150323_US_dominates_utility-scale_solar_project_development.pdf
- [5] "Solar Photovoltaic Projects in the mainstream power market" was [published](#) in 2012.
- [6] Wiki-Solar's database covers over 4,000 utility-scale solar projects, of which about two-thirds are operational, and the remainder are under construction or development.

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