

No. 283/39/2025-GRID SOLAR

भारत सरकार / Government of India

नवीन और नवीकरणीय ऊर्जा मंत्रालय/ Ministry of New & Renewable Energy (MNRE)

ग्रिड सौर ऊर्जा प्रभाग / Grid Solar Power Division

Atal Akshay Urja Bhawan,
Lodi Road, New Delhi – 110003

Date: 12th September 2025

OFFICE MEMORANDUM

Sub: Request for comments on Draft Order for Implementation of ALMM (Approved List of Models & Manufacturers) for Wafers

Reference is invited to the 'Approved Models and Manufacturers of Solar Photovoltaic Modules (Requirements for Compulsory Registration) Order, 2019 issued by Ministry of New & Renewable Energy (MNRE) on 02.01.2019 and various clarifications / amendments thereto issued from time to time along with the Procedural Guidelines dated 28.03.2019 including clarifications / amendments thereto, issued under the ALMM Order.

2. As on date, ALMM (Approved List of Models & Manufacturers) mechanism is being implemented for solar PV modules and solar PV cells.
3. It is proposed to implement the ALMM (Approved List of Models & Manufacturers) mechanism for wafers as well.
4. A draft amendment to ALMM Order in this regard is enclosed at Annexure. MNRE seeks views / comments / suggestions from stakeholders on the proposed Draft at **Annexure**.
5. Views / comments / suggestions on the aforesaid draft amendment to ALMM Order may be sent **latest by 11th October, 2025** by email to the undersigned at karndhar.sg@nic.in



(Sanjay G. Karndhar)

Scientist-E

Email: karndhar.sg@nic.in

To: All Stakeholders

Copy to: Director (Technical), NIC, MNRE, for uploading on MNRE's website

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Atal Akshay Urja Bhawan,
Lodi Road, New Delhi – 110003Date: 12th September 2025OFFICE MEMORANDUM**Sub: Draft Amendment to ALMM Order for Implementation of ALMM for Wafers**

1. Reference is invited to the 'Approved Models and Manufacturers of Solar Photovoltaic Modules (Requirements for Compulsory Registration) Order, 2019' issued by MNRE on 02.01.2019 and various clarifications / amendments thereto issued from time to time along with the Procedural Guidelines dated 28.03.2019 including clarifications / amendments thereto, issued under the subject Order.

2. It is proposed to issue List-III of wafers under ALMM, which shall be effective from the **'Effective Date' (which shall be 1st June 2028)**, as per conditions detailed out in following paragraphs.

3. ALMM List-III for wafers will not be issued unless it contains at least three wafer manufacturing units which must operate independently and shall not be under common ownership or control, whether directly or indirectly, and the aggregate wafer manufacturing of such units is at least 15 GW per annum.

4. For enlistment in ALMM list of Wafers, the Wafer-Manufacturer should also have the ingot manufacturing capacity equivalent to the wafer manufacturing capacity that it intends to get enlisted in ALMM. Thus, the wafer manufacturing capacity enlisted in ALMM List-III shall actually reflect manufacturing capacity of ingots and wafers.

5. All projects falling under the purview of ALMM shall have to mandatorily source their solar PV modules from models and manufacturers enlisted in ALMM List-I for solar PV modules and such solar PV modules in turn shall have to use solar PV cells from amongst the models and manufacturers enlisted in ALMM List-II for solar PV cells, and such solar PV cells in turn shall have to use wafers from amongst the models and manufacturers enlisted in ALMM List-III for wafers, as per the details specified in following paragraphs.

6. Projects which are exempted from using ALMM enlisted solar cells will automatically get exemption from using ALMM enlisted wafers.

7. For all projects (including the projects bid out following the Guidelines issued by the Central Government under Section 63 of the Electricity Act 2003) which are mandated to use solar PV modules from ALMM List-I (for solar PV modules) and solar PV cells from ALMM List-II (for solar PV cells), if the last date of bid submission falls on or prior to the **'Cut-Off Date' (which shall be the date, which falls one month after the date of issuance of first list date of ALMM for wafers)**, such projects shall be mandated to use solar PV modules from ALMM List-I (for solar PV modules) and solar PV cells from ALMM List-II (for solar PV cells) but will stand exempted from the requirement of using wafers from ALMM List-III (for wafers), irrespective of their date of commissioning, i.e. such projects will be exempt from the requirement of using wafers from ALMM List-III, even if their date of commissioning is beyond the 'Effective Date'.

8. Projects wherein the Project Owner had submitted its bid or had signed PPA prior to the 'Cut-Off Date' and then issues tender for EPC / solar module supply / solar cell supply, post 'Cut-Off Date', the exemption from using ALMM enlisted wafers will continue to remain applicable.

9. All projects (including the projects bid out following the Guidelines issued by the Central Government under Section 63 of the Electricity Act 2003) that are covered under ALMM and where the last date of bid submission falls after the 'Cut-Off Date' shall have a clause in their tender documents / Request for Selection (RfS) documents that the solar PV modules, solar PV cells and wafers used in such projects shall be from the models and manufacturers included in ALMM List-I (for solar PV modules), ALMM List-II (for solar PV cells) and ALMM List-III (for wafers) respectively.

10. 'Effective Date' onwards, only such solar PV modules will remain in ALMM List-I (for solar PV modules) which are using solar PV cells from ALMM List-II (for solar PV cells), which in turn are using wafers from ALMM List-III (for wafers). Solar PV module manufacturers who fail to comply to this condition, will be liable to be delisted from ALMM List-I (for solar PV modules). However, from the 'Effective Date' onwards, separate,

- *ALMM List-I(a) (for solar PV modules using solar cells and wafers not enlisted in ALMM);*
- *ALMM List-I(b) (for solar PV modules using solar cells enlisted in ALMM but wafers not enlisted in ALMM); and*
- *ALMM List-II(a) (for solar PV cells using wafers not enlisted in ALMM);*

would be maintained and these lists would contain such solar PV modules / solar PV cells, which would cater to different categories of projects which are exempted from using ALMM enlisted wafers but are mandated to use either ALMM enlisted modules or ALMM enlisted (modules & cells).

11. Net-Metering Projects and Open Access RE Power Projects, which get commissioned prior to the 'Effective Date' shall be exempt from the requirement of using wafers from ALMM List-III, but the requirement of using ALMM enlisted (cells and modules) or ALMM enlisted modules, as may be applicable, will apply.

12. Net-Metering Projects and Open Access RE Power Projects, which get commissioned on or after the 'Effective Date', will have to use solar PV modules, solar PV cells and wafers from the models and manufacturers included in ALMM List-I (for solar PV modules), ALMM List-II (for solar PV cells) and ALMM List-III (for wafers) respectively.

13. Behind the meter, captive projects, owned by Government entities, are:

- i. mandated to use ALMM enlisted solar PV modules (as per extant provisions), but are exempted from using ALMM enlisted solar PV cells and ALMM enlisted wafers, if commissioned prior to 01.06.2026;
- ii. mandated to use both ALMM enlisted solar PV modules and ALMM enlisted solar PV cells, if commissioned on or after 01.06.2026 but prior to the 'Effective Date' as mentioned above;
- iii. mandated to use ALMM enlisted solar PV modules, ALMM enlisted solar PV cells and ALMM enlisted wafers, if commissioned on or after the 'Effective Date' as mentioned above;

14. Thin Film technology based Solar PV Modules enlisted in ALMM List-I and manufactured in Integrated Solar PV Module Manufacturing units enlisted in ALMM List-I, shall be considered to be in deemed compliance to the requirement of using wafers from ALMM List-III and solar PV cells from ALMM List-II.

15. Notwithstanding details in above paragraphs, there shall be no relaxation in the Domestic Content Requirement (DCR) provisions, wherever applicable in respect of MNRE's Schemes/

Programs like Components B&C of PM-KUSUM, PM Surya Ghar: Muft Bijli Yojana and CPSU Scheme Phase-II.

16. Procedural Guidelines for enlistment of Models and Manufacturers of wafers under ALMM List-III (for wafers) will be issued subsequently.

17. This issues with the approval of _____.

To: All concerned

Copy to: Director (Technical), NIC, MNRE, for uploading on MNRE Website