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Pick, Place and Perform: Navigating domestic content in a modular, mix-and-match market

7-MINUTE FIELD GUIDE

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Domestic content is no longer “all domestic or nothing.” It is a configurable procurement strategy.

OLD QUESTION

**Are domestic content
modules available?**

Single sourcing path



NEW QUESTION

**Which mix gets you to the 10%
adder — without adding cost,
delay or compliance risk?**

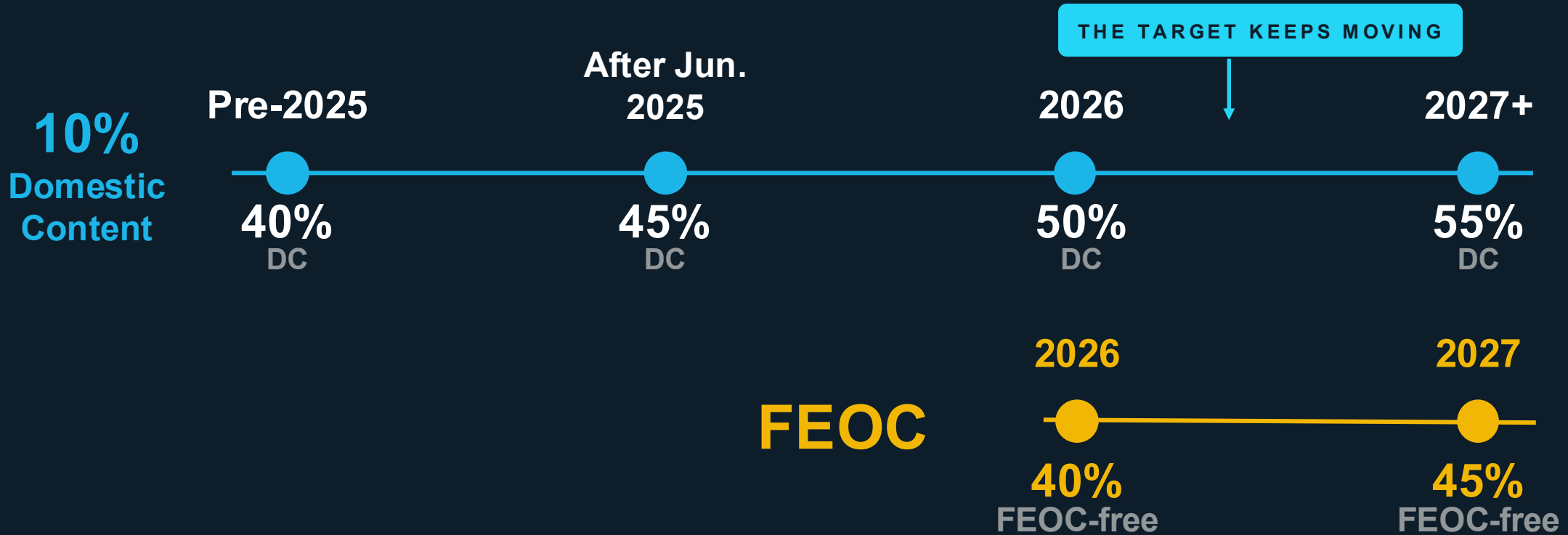
U.S. cells

Domestic
frame

Compliant
imports

Docs +
provenance

Policy dates, project dates and financing dates do not move at the same speed.



The strategic move is not to chase one percentage. It is to model the path that fits your placed-in-service window, financing assumptions and supply-chain proof.



What can actually build the DC stack to 50-55%?

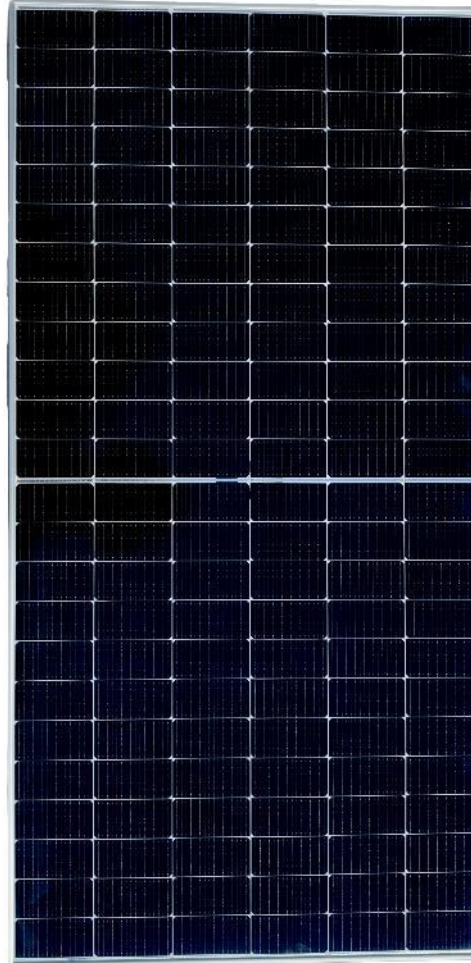
Domestic content value comes from understanding which U.S.-made components are available, which are constrained and how each one contributes to the 10% adder.

Solar cells
~31-53%

Frame
~5-8%

Backsheet
~3-5%

J-box & Other
~1-2%

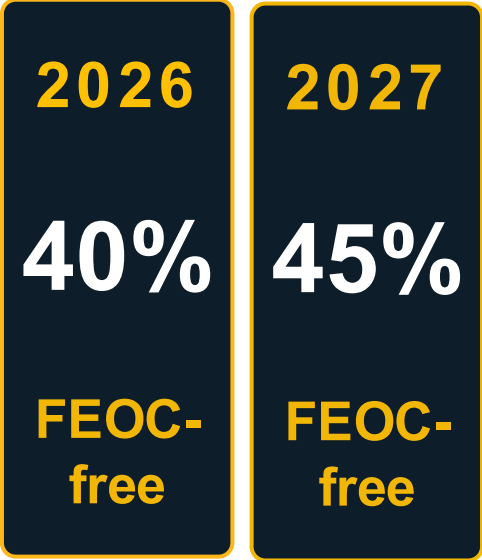


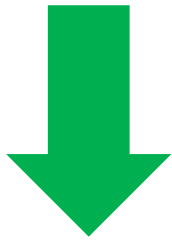
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Sourcing FEOC-compliant solar panels





2026

40%

FEOC-free

2027

45%

FEOC-free

ITC Safe Harbor 2025-08 (Update - Jan 2025)

Manufactured Component	Grd Mount Tracker	Grd Mount Fixed Tilt	Rooftop MLPE	Rooftop String
Module: Cells	38.0	53.2	31.1	38.5
Module: Frame	6.0	8.5	4.9	6.1
Module: Front Glass	6.0	8.4	4.9	6.1
Module: Encapsulant	3.8	5.4	3.1	3.9
Module: Backst/glass	3.8	5.4	3.1	3.9
Module: J-Box	1.0	1.4	0.8	1.0
Module: Edge Seals	0.3	0.4	0.2	0.3
Module: Pottants	0.3	0.4	0.2	0.3
Module: Adhesives	0.0	0.0	0.0	0.0
Module: Bus Ribbons	1.5	2.1	1.2	1.5
Module: Byps Diodes	0.4	0.6	0.3	0.4
Module: Production	4.7	6.7	5.8	7.2

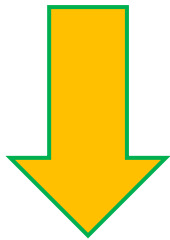
42.7%

59.9%

40.0%

45.7%

**ITC Safe Harbor 2025-08
(Update - Jan 2025)**



2026	2027
40%	45%
FEOC-free	FEOC-free

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46.5%	59.9%	45.7%	45.7%
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The profitability playbook

Domestic content is easiest to monetize when it is modeled early and documented continuously.

- 1 Model earlier**
Include DC adder in initial project pro forma
- 2 Procure options**
Evaluate multiple domestic supply paths early
- 3 Validate components**
Confirm FEOC compliance and domestic content %
- 4 Align capital**
Structure financing around the documented adder
- 5 Preserve optionality**
Design supply chain to adapt to policy changes

This is the shift:
Domestic content success comes down to three moves: pick the right configuration, place it into the project plan early and perform with documentation that stands up to diligence.



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Thank You

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