

PV CellTech USA 2026 • Panel Discussion • Oct 12, 2026

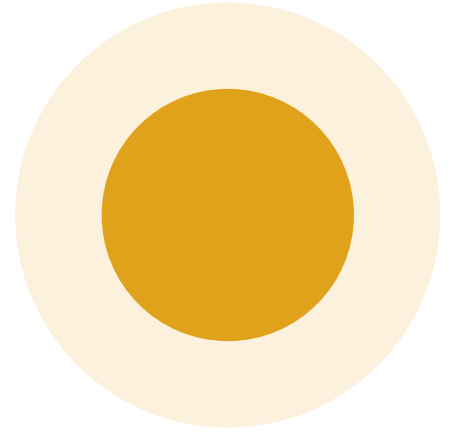
What does a bankable U.S. PV supply chain look like?

How technical advisors to banks and buyers test, audit and price
module risk so new U.S. supply is bankable

QA & QC, risk allocation and remedies — with two field examples

Jon Previtali

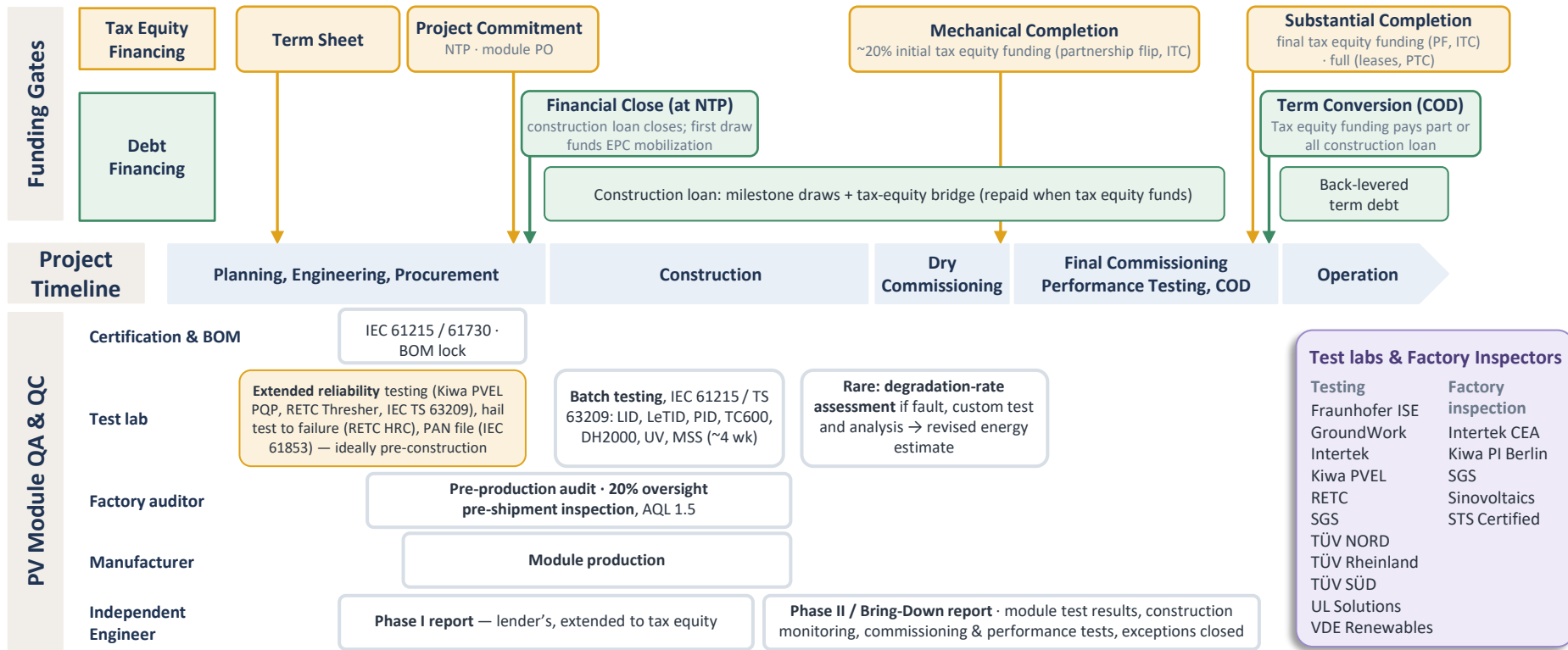
Founder & CEO, New Energy Diligence



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Third Party Module Quality Assurance & Control from PO to COD

Certification, extended testing, factory audits and batch testing — closed out before tax equity and debt fund



Test & audit pass criteria ≤5% degradation per extended sequence · 98.5% conforming at 95% confidence · AQL 1.5 = Acceptance Quality Limit (ISO 2859-1), ≤1.5% major defects

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Using Reliability Testing to Mitigate Risk



Outcome released when tests pass; on failure the IE re-estimates energy and the funding price drops by the NPV delta

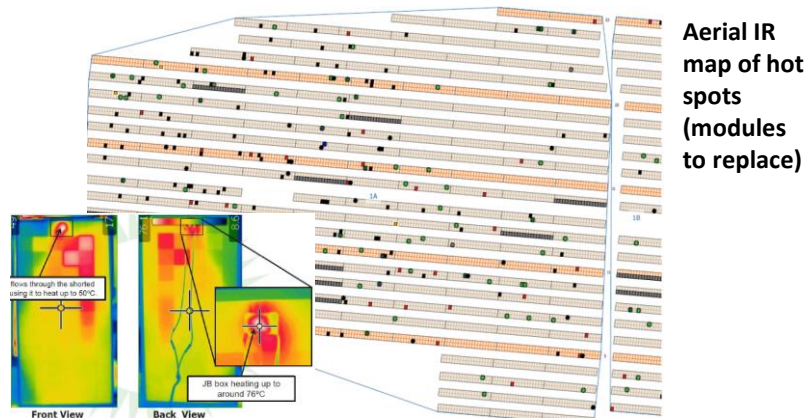
Compendium of Photovoltaic Degradation Rates



Two Detection & Remediation Examples

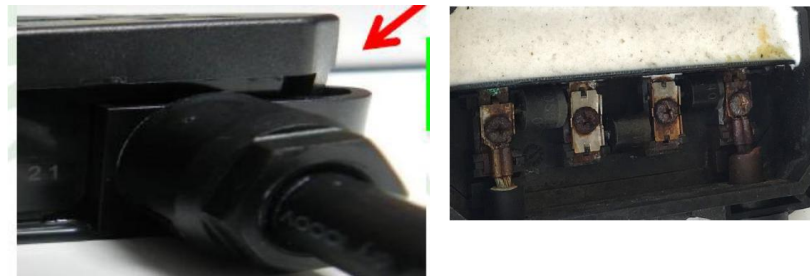
Predict → mitigate → monitor → remediate, in practice

1. Bypass diode failures



Predict	Diode fails at TC400, two at TC600; JB lid warps from diode heat
Mitigate	RCA, yield-impact estimate, yearly IR scans, extended warranty with serial-defect protection
Monitor	3 yrs in field: aerial IR imaging, confirmed by field IV tests
Remediate	Serial-defect warranty claim

2. Junction box lid failure



Predict	PPE (polyphenylene ether) lid fails DH1000 — found after many untested modules were already deployed
Mitigate	RCA, extended warranty, letter of credit, lid redesign + FEA, IE review, field inspections
Monitor	Original and replacement lids failing; corrosion on 3-yr coastal rooftop
Remediate	New-material lid passes DH2000 / HF100 / TC-HF with 0% failures; replacement program

New from NED



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**NOW
LIVE!**

NED Due Diligence Reports on PV Modules



A structured, sourced read on a PV module and manufacturer's bankability — public filings, Kiwa PVEL PQP results, analyst rankings, OEM- or IE-supplied material as available — reviewed and signed by a senior engineer.

50+ OEMs

Kiwa PVEL Top Performer universe

14 criteria

findings + risk rating each

Risk Matrix

risk scale + rating vs. peers

Gaps

open items to OEM, by materiality

The 14 criteria

- IE technical review
- Fleet track record
- Customer references
- Manufacturing & QA/QC
- Operations & service
- IP / escrow
- Unique spare parts
- Safety (toxicity, TRIR)
- Decommissioning & recycling
- Warranties
- Historical defects
- OEM financials
- Import risk & domestic tax credits

NEW

Inspection Analysis & Remedies with Raptor Maps



The same human expert + AI process, applied to Raptor Maps drone inspection data. Every finding is reviewed by a NED engineer — no AI-only output.

How it works

- Raptor Maps detects & classifies anomalies
- NED interprets: root cause + remediation options with risk & cost/benefit
- Advisory working sessions

Remedy options

- Do nothing · incremental fixes · proactive fix
- Warranty claim · self-perform · contract out / RFP

Lifecycle stages served

- Construction · commissioning · annual health checks
- Unplanned maintenance · end of warranty · acquisition

Follow-through material

- Warranty evidence packages · contractor lists · work instructions

Joint offering in development — pilot scoping in progress, beta clients wanted.

Also from NED

Due Diligence Expediting for IEs and deal teams (AI platform; subcontracted work under the IE brand) · **Direct Due Diligence** for investors, lenders and owners · **Advisory** — term sheets, underwriting, warranty & insurance claims, hail / NatCat · **Product Design & Commercialization**

Thank you.

Questions welcome.

Jon Previtali

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