

Operationalisation of ALMM List-II for Solar PV Cells

4 June 2026

The Ministry of New and Renewable Energy (MNRE) has operationalised the Approved List of Models and Manufacturers (ALMM) framework for solar PV cells with effect from 1 June 2026, thereby completing the two-tier sourcing structure that the ALMM regime had originally envisaged. While the framework, when introduced in 2019, contemplated approved lists for both solar PV modules and solar PV cells, implementation was initially confined to only solar modules, due to limited domestic cell manufacturing capacity at that time. With that capacity having grown considerably in recent years, MNRE, through its Office Memorandum dated 9 December 2024, provided for the operationalisation of ALMM List-II with effect from 1 June 2026, marking a significant step in India's efforts to strengthen domestic manufacturing capabilities and reduce reliance on imports.

In consequence, all projects that were required to comply with ALMM List-I, such as government and government-assisted projects, projects established under government schemes and programmes, projects awarded pursuant to competitive bidding guidelines issued under Section 63 of the Electricity Act, 2003, and open access and net-metering projects are now required to source solar PV cells from manufacturers enlisted under ALMM List-II.

The transition has been managed in stages. The first ALMM List-II was published on 31 July 2025 and has since undergone periodic revisions, resulting in an expansion of the approved manufacturer base. MNRE also provided further clarity on its applicability, confirming that projects which submitted bids on or before 31 August 2025 would be exempted from the requirement to source solar PV cells from manufacturers enlisted under ALMM List-II, even if commissioned after 1 June 2026. As the implementation day approached, MNRE has also confirmed that no blanket extension of the 1 June 2026 deadline would be granted to the projects. However, a limited relief is available for certain open access and net-metering projects that had achieved specified development milestones prior to 1 June 2026; such projects may apply for project-specific extensions, subject to prescribed eligibility criteria and review by an expert committee constituted by MNRE.

Comment

The operationalisation of ALMM List-II marks a pivotal development in the Government's systematic expansion of domestic sourcing requirements within the solar sector. This extension reflects both the increased availability of domestic manufacturing capacity and a continued policy emphasis on supply-chain localisation. Separately, MNRE has also proposed the introduction of ALMM List-III for solar PV wafers with effect from 1 June 2028. While the proposal is yet to be implemented, it provides an indication of the broader policy direction and suggests that localisation requirements may progressively extend to additional segments of the solar manufacturing value chain. Taken together, these developments reflect an increasingly integrated approach to domestic manufacturing policy, with regulatory requirements being progressively extended across successive stages of solar manufacturing.

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