Community Solar in Oregon

Charlie Coggleshall
Senior Policy Analyst
• Founded in 1981
• Mission is to make solar energy a significant energy source by expanding markets, strengthening the industry, and educating Oregonians about its benefits.

• Founded in February 2016
• Mission is to empower energy consumers by increasing access to affordable, reliable clean energy, maximizing existing opportunities and supporting opening new markets for community solar.
Process Overview

2016
SB 1547 is law (3/8/2016)

2017
Rules Adopted (6/29/2017)

2018

Stakeholder Engagement and Rulemaking

2017

Implementation

Rules Adopted (6/29/2017)

2018

Program Launch ??

2019
What we’re excited about:

- **160+ MW**
  - PGE – 93 MW; PAC – 63 MW; IDP – 3 MW

- **Fair rules with built in flexibility**
  - 3rd-party administrator; Implementation Manual

- **Project size and location**
  - 3 MW project limit within same service territory

- **Opportunities for all types of customers**
  - Residential/small commercial and low-income requirements
What we’re excited about:

• Hungry Industry
  • Solar capacity nearly doubled in Oregon in 2016
  • RETC Sunset
  • Community solar brings new opportunities
    • Developers; Installers; Financial analysts; Land owners; Civil engineers; Local organizations

• Motivated Consumers
  • Majority of customers don’t have option to go solar
  • Oregon ranks in top tier of “eco-friendly” states
  • Benefits reach beyond environment
    • Bill savings; tax revenues; lease payments
What we’re focused on now:

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For more information:

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Navigating the Complexities of Community Solar:

- Project Funding
- Land Procurement & Management
- Facility Construction
- Tax Credit
- Customized Marketing
- Consumer Financing

- Customer Acquisition
- Participant Contracts & Administration
- Customer Engagement
- On-Bill Crediting
- Legal and Tax Structuring
- Facility O&M
Oregon Market Overview

• Solar Installed: 276.2 MW (123.9 MW in 2016)
  • National Ranking: 20th (18th in 2016)
  • Percentage of State’s Electricity from Solar: 0.47%

• Solar Jobs and Ranking: 4,509 (13th in 2016)\(^3\)
  • Solar Companies in State: 160 companies total; 33 Manufacturers, 78 Installers/Developers, 46 Others

• Price Declines: 55% over last 5 years

• Growth Projections and Ranking: 1,549 MW over next 5 years (ranks 15th)
The community solar market is rapidly growing into the next major U.S. solar market segment.

While legacy U.S. solar market segments have stagnated or declined in 2017.

- Residential: -3%
- C&I\(^{(1)}\): -3%
- Utility-Scale: -25%

\(^{(1)}\) Excludes community solar

Sources: Average of GTM Research and National Renewable Energy Lab forecasts

Source: GTM Research & SEIA U.S. Solar Market Insight Q3 2017