

## CALIFORNIA

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With a 50% RPS and full retail net metering in place, SEIA is working to ensure the value of these victories is realized through continued work on RPS implementation, rate design and solar grid integration.

- SEIA is actively working across several rate cases to support workable time-of-use rates, prevent fixed charges and demand charges, and retain solar-friendly rate schedules. A decision on implementation of Time of Use rates is expected in mid-December.
- Legislation to allow for the creation of a regional independent system operator is expected in 2017 and SEIA will continue to work towards passage of legislation that has adequate governance provisions and guardrails that will promote solar development in California and throughout the west.
- SEIA is engaged in a number of potentially transformative proceedings, including grid modernization proceedings and the creation of a new carbon-based Integrated Resource Planning process, through which much of the RPS will be implemented.

## MASSACHUSETTS

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Upon successfully securing legislation that increases the statewide net metering caps in April 2016, and requires the development of a new solar incentive program, SEIA is working with the legislature, the governor's office, and administrative agencies on a number of implementation issues.

- SEIA is working to close the potential gap between the end of SREC II incentive program and the beginning of the new incentive program.
- We are engaging with state regulators to ensure the new proposed incentive program supports at least 1600 MW of solar development, and that incentive levels under the new program are known, predictable and support industry growth, at a reduced cost to customers and the state.
- SEIA is also developing legislation to once again increase the net metering caps beyond their current levels.

## NEW YORK

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SEIA is engaging with state regulators on their regulatory overhaul, known as Reforming the Energy Vision (REV), to promote solar, maintain support for solar programs, and develop interim successor tariffs for net metering. Areas of focus:

- SEIA is helping to design successor tariffs to net metering under the Commission's new compensation framework for distributed solar (VDER).
- SEIA filed one of the major proposals in the VDER case and is leading a coalition of stakeholders to fight for full compensation, strong grandfathering policy, and increased market opportunities for community and DG solar.
- SEIA helped ensure that the procurement guidelines for the 50% CES will be revisited to take into account factors beyond price in selecting CES resources, potentially providing new opportunities for utility scale solar.
- SEIA is engaged with New York's efforts to overhaul the utility business model, advocating for a fair playing field for solar companies as the utility business model evolves.

## TEXAS

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SEIA is actively engaged in dockets at the Public Utilities Commission of Texas and ERCOT that affect how utility-scale solar is treated in the Texas electric market. ERCOT predicts 14,000 – 27,000 MW of solar capacity additions by 2031. SEIA has begun to prepare for the 2017 legislative session, and will defend against any anti-solar proposals.

## NEW JERSEY

SEIA is working with the legislature and other stakeholders to guarantee continued solar growth in the state even with forecasts showing a flattening demand for energy.

- We are advocating for an SREC reform bill that has passed the upper house of the State Legislature and is awaiting action in the lower house, as well as the signature of the Governor.
- SEIA has provided design criteria for a proposed Community Solar bill to ensure a workable program. The bill now has traction in both houses setting the stage for activity during 2017.

## NEVADA

SEIA is continuing to fight to restore solar policies in Nevada. The PUCN's approval of a grandfathering settlement in September was a necessary first step. SEIA is preparing for the 2017 legislative session, where prospects have improved for productive legislation – as both houses have flipped back to Democratic control. SEIA has contracted with a lobbyist to engage in the 2017 legislative session, which many are billing as “the energy session.” Legislation is expected regarding the future of net metering, and on consumer protection issues, and on implementation of the consumer choice initiative that passed in November.

## ARIZONA

SEIA is re-engaging in Arizona. With co-investment support from a number of member companies, SEIA has contracted with attorneys and an expert witness to work on rate design in the APS General Rate Case. Initial testimony is due in January. SEIA is monitoring the Value of Solar case in Arizona, and working behind the scenes with allies including AriSEIA and Vote Solar. A decision on the VOS case is expected in late December.

## COLORADO

SEIA helped engineer a settlement agreed to by 22 of 26 stakeholders in three key regulatory proceedings. The PUC approved the Settlement in November. Key provisions include:

- Grid Usage Charge defeated. Instead, Xcel will offer a time-of-use rate as the primary residential rate structure in the future. Protections for existing net metering customers are provided.
- A doubling of the capacity in Xcel's Solar\*Rewards incentive program to 225 MW over the next 3 years.
- The Community Solar Gardens capacity was increased from a minimum of 6 MW/yr to a minimum of 15 MW/yr.
- For the first time, there will be specific program offerings for low income customers. These offerings include a rooftop solar program and a dedicated 4 MW/yr for low income community solar, among other provisions.

## SOUTHEAST STATES

SEIA is engaged across the south on both utility scale and DG solar. Recent developments:

- Florida: SEIA was involved with two big wins in Florida in 2016: a successful passage of Amendment 4 in August, and the defeat of utility-backed Amendment 1 on the general election ballot. The Amendment 1 defeat was especially demonstrative of the favorable popular opinion of solar energy, and a major black eye for utility interests that supported the deceptively-worded amendment.
- North Carolina: SEIA is a formal stakeholder in a quasi-legislative “Energy Working Group,” a large group of corporate energy consumers, utilities, agricultural interests, and clean energy advocates working on comprehensive energy legislation to be introduced in the 2017 legislative Session. Issues being discussed include third party sales of electricity, incentives for rooftop solar, an expansion of the state RPS, and utility rate design.
- South Carolina: Rooftop solar companies have coordinated with SEIA on ongoing consumer protection issues being surfaced by utility interests in the public forum and at the legislature. SEIA will use its existing consumer protection materials to educate local and national solar companies and the SC Office of Regulatory Staff in order to avoid overreach from the legislature.