

# *Fixing the Maryland SREC Market*



Implications for the Maryland Industry

EPC Perspective – jobs and activity

Residential rooftop market

Commercial market

Community Solar

Wholesale projects

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# Success Under the Sun

Renewable Generators Registered in GATSpa



Maryland RPS has delivered statewide in-service systems topping 612 MW

- ✓ Maryland PV Generation exceeding 2016 RPS goal 1.4% of State Load (200% of goal)
- ✓ 35,000 Systems
- ✓ 4,200 jobs
- ✓ 2016 on track for 200 MW
- ✓ This is Infrastructure scale.

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# Closer Look at 2016 – SRECs Matter

Residential Market is performing, however...

- ✓ Since June 2016 Maryland delivered an average of 9MW/Month
- ✓ Since March 2016 Maryland commercial sector effectively stalled

2016	GATS Registrations (as of 11/8/2016)		Ave Size kW
	MW/Month	No. of Systems	
Jan	35.5	1,217	29.2
Feb	33.2	1,541	21.5
Mar	18.7	1,553	12.0
April	13.2	1,231	10.7
May	26.8	1,738	15.4
June	12	1,311	9.2
July	11.6	1,232	9.4
Aug	10.7	1,137	9.4
Sept	9.1	980	9.3
Oct	4.7	500	9.4
Nov			
Dec			
Total:	175.5	12440	14.1

# A Little Sunblock needed from a new RPS

## LIFETIME MD GATS DATA

	No. of Systems		MW in Service		Percent of
					Lifetime
Res 1-20kW	33,696	33,696	275	275	<b>45%</b>
C&I 21kW -99kW	971	1,269	30	224	<b>37%</b>
C&I 100kW - 1MW	234		78		
C&I 1-4 MW	64		116		
<b>C&amp;I Total</b>	<b>1269</b>		<b>224</b>		
Utility Scale (4-30MW)	8	8	112	112	<b>18%</b>
<b>Totals:</b>		<b>34,973</b>	<b>611</b>	<b>MW</b>	

## 2016 PROJECTED FROM MD GATS DATA

	No. of Systems		MW in Service		Percent of
					2016*
Res 1-20kW	15,079	15,079	130.6	130.6	<b>64%</b>
C&I 21kW -99kW	240	268	6.7	29.4	<b>14%</b>
C&I 100kW - 1MW	16		6.7		
C&I 1-4 MW	12		16		
<b>C&amp;I Total</b>	<b>268</b>		<b>29.4</b>		
Utility Scale (4-30MW)	3	3	43	43	<b>21%</b>
<b>Totals:</b>		<b>15,350</b>	<b>203</b>	<b>MW</b>	

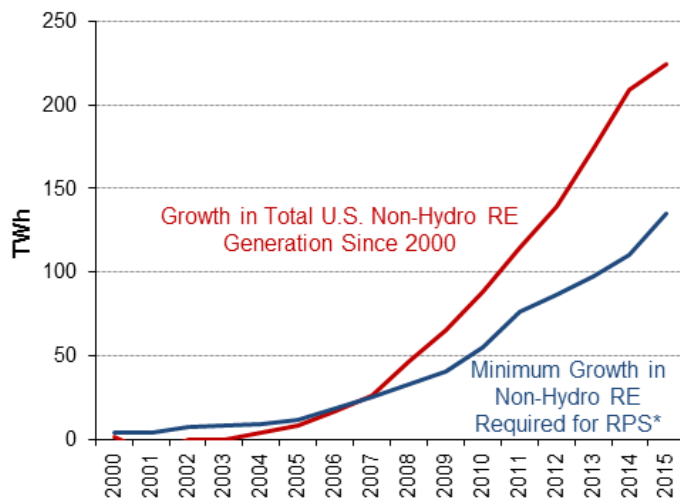


# The Maryland RPS

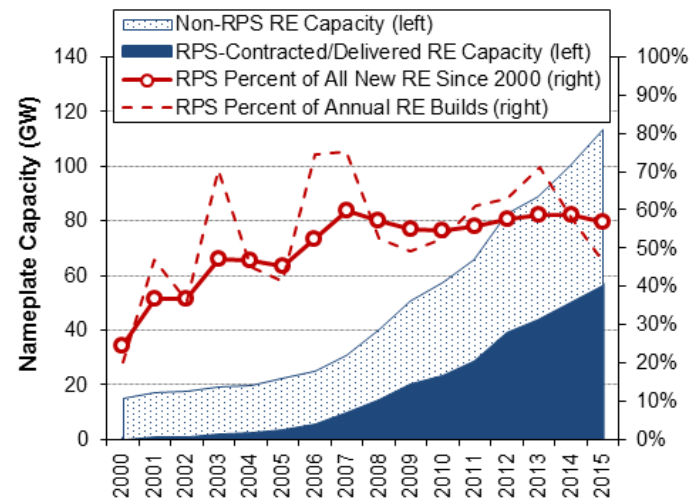
## RPS Policies Matter

### RPS Policies Have Been A Driver of Renewable Electricity Growth

RPS requirements comprised 60% of total growth in U.S. renewable electricity generation since 2000



More than half (57%) of all new renewable generation capacity is sold to entities with RPS obligations



Source: Barbose, Galen. 2016. "U.S. Renewables Portfolio Standards: 2016 Annual Status Report." Lawrence Berkeley National Laboratory. <http://rps.lbl.gov>

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# The Over-ride RPS (HB1106/SB0921)

25% by 2020, 2.5% Solar Carve-out



## 2017 PROJECTED FROM MD GATS DATA

	No. of Systems		MW in Service		Percent of 2016*
Res 1-20kW	15,079	15,079	130.6	130.6	<b>37%</b>
C&I 21kW -99kW	480	548	13.4	82.8	<b>23%</b>
C&I 100kW - 1MW	32		13.4		
C&I 1-4 MW	36		56		
<b>C&amp;I Total</b>	<b>548</b>	<b>548</b>	<b>82.8</b>	<b>82.8</b>	<b>23%</b>
Utility Scale (4-30MW)	6	6	140	140	<b>40%</b>
<b>Totals:</b>		<b>15,633</b>		<b>353 MW</b>	

Tier 1	2017	2018	2019	2020
Renewables-	11.95%	14.3%	18.45%	22.5%
Solar carve out:	1.15%	1.5%	1.95%	2.5%

# The Fix.



- Support Annapolis on a New RPS
- Stay engaged
- Keep building
- Promote cumulative success
- MDV SEIA Matters