National RPS Summit
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Carrie Hitt, Vice President State Affairs, SEIA
Introduction to SEIA

• SEIA is the voice of the U.S. solar energy industry
  – Founded in 1974
  – 1,000 member companies
  – Across the US, including NYSEIA
  – Largest solar companies in the world
  – We promote solar to the State Policy Makers, White House and Congress
  – Working with local chapters and other key industry players at the state level – for example, ELPC

• Mission: Build a strong solar industry to power America
RPS Increasingly Designed to Support Resource Diversity: Most Commonly Solar and DG

16 states + D.C. have solar or DG set-asides, sometimes combined with credit multipliers; 3 other states only have credit multipliers

Differential support for solar/DG provided in CT and RI via long-term contracting programs with legislatively-established budgets or capacity targets

Note: Compliance years are designated by the calendar year in which they begin

Source: Berkeley Lab

Ten states created solar/ DG set-asides since 2007:
DE, IL, MA, MD, MO, NC, NH, NM, OH, OR

Set-aside
Set-aside with multiplier
Multiplier
State Rankings by Q2 PV Installed Capacity

1- California 217 MW
2- Arizona 173 MW
3- New Jersey 103 MW
4- Nevada
5- Texas
6- Illinois
7- North Carolina
8- Massachusetts
9- New Mexico
10- Hawaii
11- New York
12- Tennessee
13- Pennsylvania
14- Maryland
15- Colorado
16- Oregon
17- Ohio
18- Florida
19- Missouri
20- Washington
21- Connecticut
22- Delaware
23- Wisconsin
24- DC
25- Vermont
Other

Source: SEIA/GTM Solar Market Insight “Q2 2012”
## State Rankings by Cumulative Installed Solar Electric Capacity as of Q2 2012

### Installed Solar Electric Capacity

<table>
<thead>
<tr>
<th>Rank</th>
<th>State</th>
<th>Capacity</th>
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<tbody>
<tr>
<td>1</td>
<td>California</td>
<td>2,235.5</td>
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<tr>
<td>2</td>
<td>New Jersey</td>
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<td>3</td>
<td>Arizona</td>
<td>622.2</td>
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<td>4</td>
<td>Nevada</td>
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<td>Colorado</td>
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<td>Other</td>
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<td>70.0</td>
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Source: SEIA/GTM Solar Market Insight “Q2 2012”
Top 20 Corporate Solar Users Have Systems from Coast to Coast

Source: SEIA “Top 20 Corporate Solar Users”
CSP Installations and Forecast

Source: SEIA/GTM Solar Market Insight “Q2 2012”
### 2013

**Challenges**
- Success – Hitting targets -
- Political challenges – “purple states”
- Broadening definitions – CT
- Legal questions – AZ, CO
- Policy substitutes?

**Opportunities**
- NY RPS review
- MA increase
- Capacity issues
- Declining cost/technical advancements