State of the Solar Industry

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Overview

Last two years show declining industry activity.

Significant amount of regulatory activity.

- Closing of PSIP
- New DER Order
- Grid Modernization
- Many Others…

Highlights and Lowlights

Next Steps

Questions

October 2015-2017 in Data

8765 Systems

- Total Systems Executed (May 2015-Nov 2017)
- 69% NEM, 28% CGS, 3% CSS

45.33%

- Pulled Permits (PV) down 2016/2017

-35%

- SHW Collector sales across all common sizes show flat to slightly declining growth over last 2 years

79%

- Most recent business survey indicating decrease of PV related business over 12 months

5395

- Number of solar variances approved

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Regulatory Activity

DER Docket (2014-0192)

- Recent order opening Smart Export and CGS+
- Clarification for Energy Storage + NEM
- More Guidance + Market Track Issues

Grid Modernization

- HECO filed final report mid year
- What's next for utility planning?

PSIP

CBRE

Demand Response

Rate Cases Galore!

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Highlights

New options for DER consistent w/ grid services and customer choice.

Clear direction from PUC for energy storage and realignment to “Inclinations”.

Market track issues give opportunity for more productive discourse.

CSS starting to pick up, success at Oahu DPP.

Advanced inverter functionality good for the grid.

Lowlights

Market uncertainty.

Low/slow adoption of CSS.

Difficulty in permitting and interconnection.

Clarification needed…

No significant bills passed in last few years.

Holy variance requests Batman!

What's next?

Jump start the market for Smart Export and CGS+

- NEM – CGS/CSS transition was rough…

Discussion about utility business model

Market track issues

Value of solar and/or grid services

Pass legislation for incentives to build for all customer classes

Clean up the variance

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Questions?

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