

Georgia Solar Assessment

2019-22

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Georgia Solar Market Forecast

A. Georgia Power Company

- I. 2019 *Approved* IRP:
 - a. 2,000 MWs of Utility Scale Solar
 - b. 210 MWs of Distributed Generation Solar

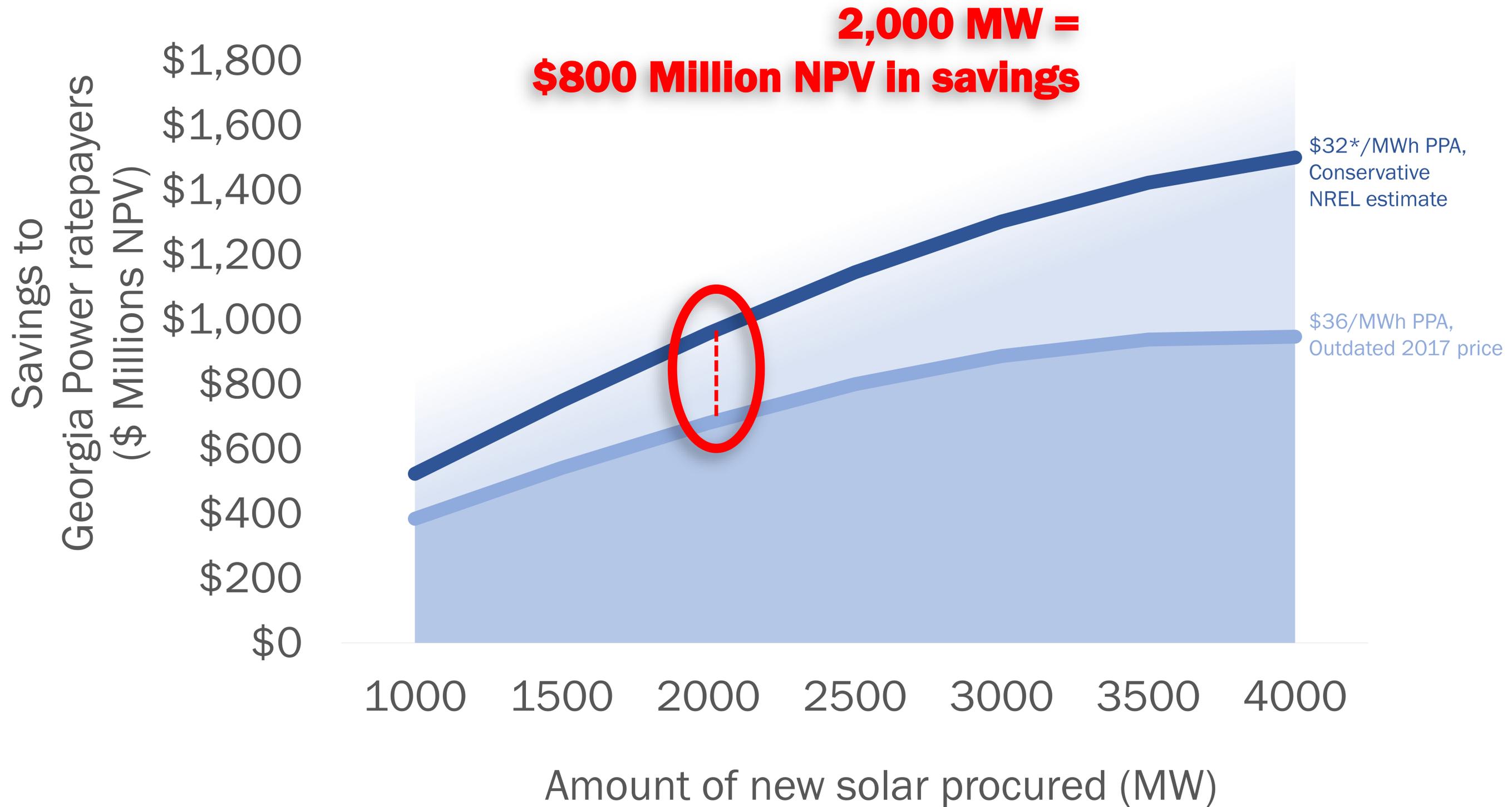
B. Electric Management Cooperatives (EMCs):

- I. 2019-22:
 - a. *Estimated* New MWs:
 - a. 350 Utility Scale
 - b. 50 Distributed Generation

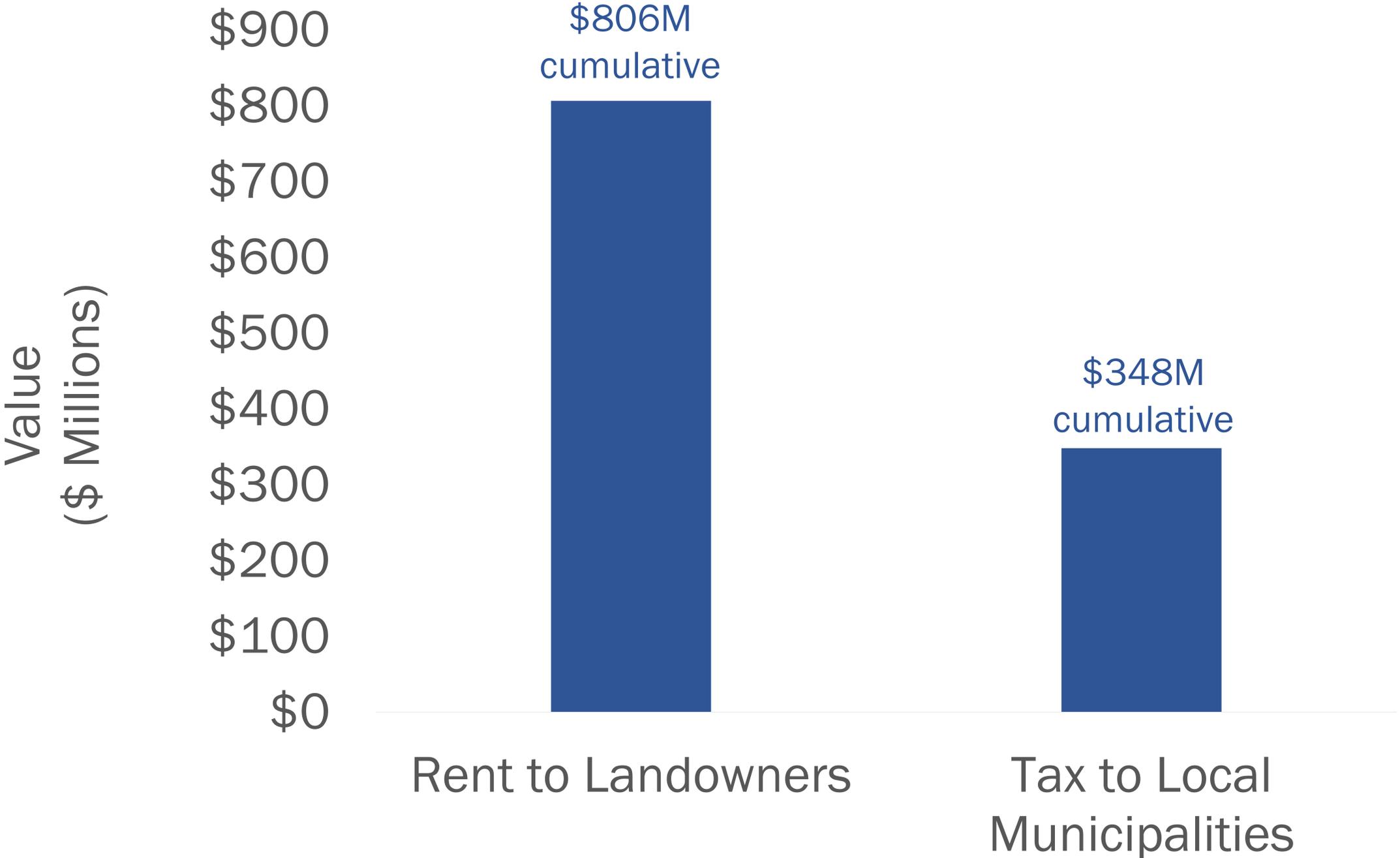
C. Municipal Energy Authority of Georgia (MEAG)

- I. 2019-22:
 - a. *Estimated* New MWs:
 - a. 300 Utility Scale

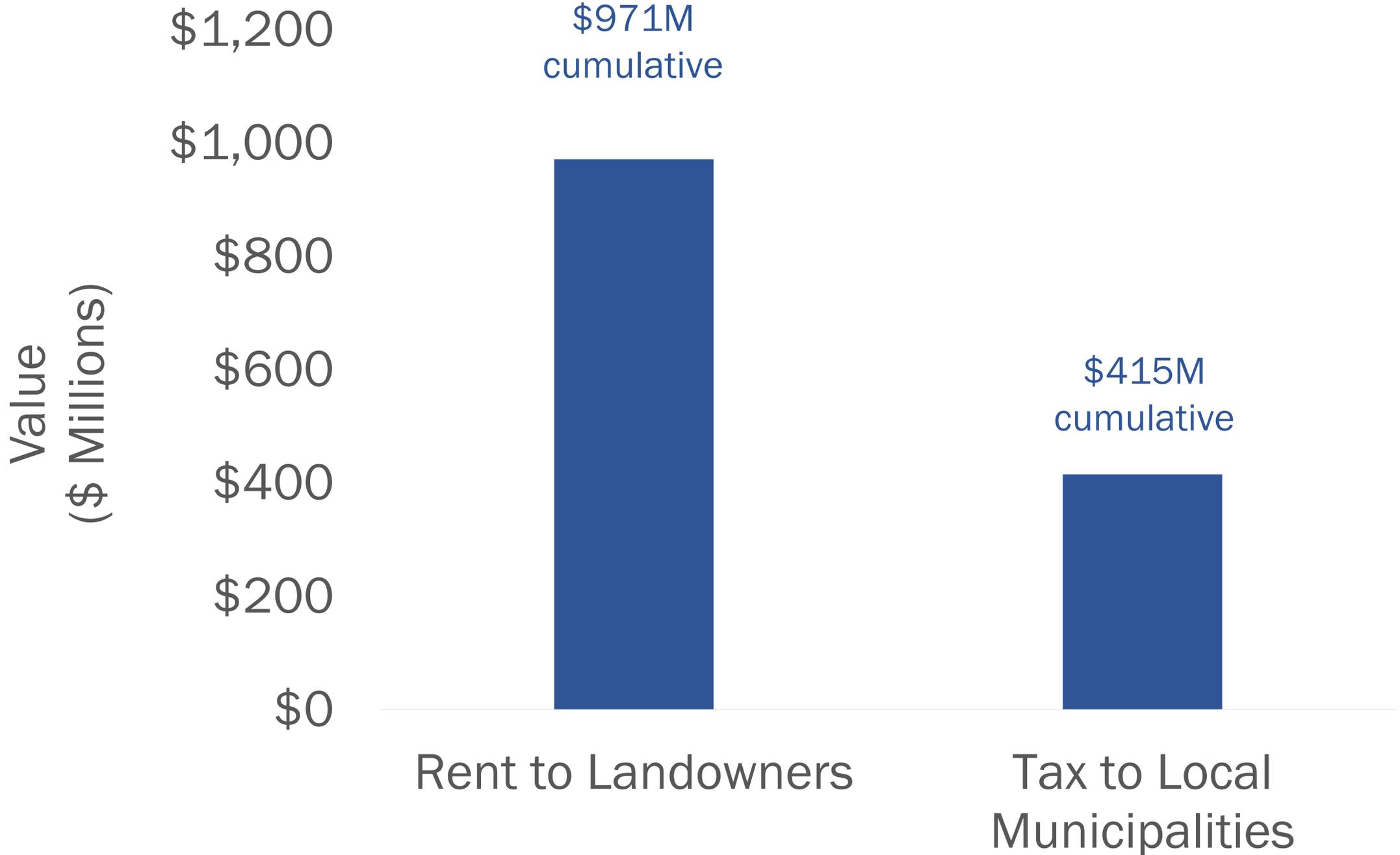
Georgia Solar IRP Economic Impact = at least \$800 Million in savings to Georgia Power ratepayers



\$1.15 Billion in external economic benefit to Georgia landowners and local municipalities- *GA Power Company Only*



\$1.386 Billion in external economic benefit to Georgia landowners and local municipalities *including EMC & MEAG*



Georgia Solar Market Impact

- **Industry Perspective**
- Southern Company is transitioning away from (retiring) coal because it is no longer cost competitive; gas, nuclear, solar will comprise most of the replacement generation in Georgia.
- Another 3 years of solar market expansion expected, which builds upon 5-6 previous years of growth. Skilled labor and inexpensive capital are now readily available to the GA solar market.
- Record low solar pricing expected even beyond the expiration of the federal solar tax credit.
- Georgia has become one of the most stable, competitive solar markets in the US, but permitting and zoning is an increasing concern as large projects compete for a finite number of viable project sites.
- No state-wide solar tax abatement. Rural, southern counties are in an 'arms race' as they compete to incentivize solar projects to their counties.

Georgia Solar Market Impact

- **County Perspective**

- *Rural Counties:*

- 15-20 new Utility Scale projects. Expected size: 1,000 -3,000 acres
- 75-100 Medium Sized Projects. Expected size 20-40 acres
- Rural Counties will begin experiencing this 3rd “rush’ of solar in the State before the end of this year
- 12,000 MWs of projects currently in the interconnection queue

- *Urban Counties:*

- Utility led (supply –sided) solar will not impact urban counties except at the peripheries
- 1-5 Medium Sized Projects projected
- Behind the Meter (rooftop) projects will be constrained by rate plan demand charge updates in the 2019 rate case.

Georgia Solar Permitting & Zoning

- Solar will continue to present challenges for local jurisdictions to regulate because:
 - A) Solar industry is new to Georgia
 - B) Multiple solar solutions available to Georgia market, which impact local jurisdictions in different ways
 - C) 159 Counties in Georgia with unique systems of governance
 - D) Solar applications will continue to evolve, creating new challenges for permitting as the technology improves.
- Result:* Standardized solar ordinance is not possible in Georgia.



Questions

