

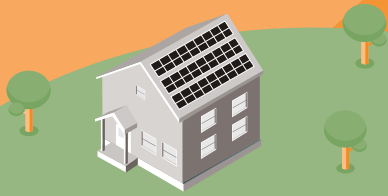
A THRIVING SOLAR INDUSTRY

RESIDENTIAL

COMMERCIAL

COMMUNITY

UTILITY



Residential solar often leads to more awareness of the importance of energy in our daily lives as it offsets energy load at the home. Residential market sector primary benefits include:

- Reduces energy bills
- Increased freedom to choose your energy
- Local jobs
- Reduces costs for utilities
- When paired with battery storage, creates resilience from natural disasters
- Rooftop solar uses available space on rooftops



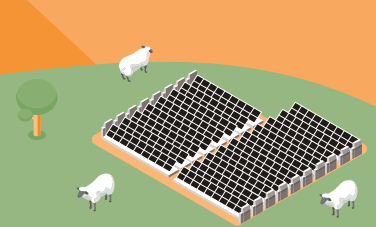
Industry and businesses embrace the idea that energy choices matter but a payback of more than five or ten years was simply “too risky.” Commercial market sector primary benefits include:

- Improve brand recognition and show commitment to a sustainable future
- Employee pride and satisfaction
- Hedge against electricity price volatility and inflation
- Same benefits as listed in residential market sector including reduced costs and increased resiliency



Community solar provides anyone with an electricity bill — residential or non-residential — with an opportunity to share in the costs and benefits of solar generation. The primary benefits of community solar include:

- Enables access to solar generation for customers unable to install solar due to property ownership or siting constraints
- Allows customers to leverage economies of scale and more optimal locations and configurations of larger-scale solar projects
- Ensures equitable opportunities for participation across customer type
- Requires at least 10% of program capacity to serve low-income customers



The utility solar sector is critical for reaching economies of scale and providing low cost solar power. The residential and commercial market sectors benefit greatly from the momentum created by this sector. Utility market sector primary benefits include:

- Lower cost energy
- Faster impact on carbon reduction from more MegaWatt's installed
- Achieves economies of scale

30-40%

of the solar job market in Oregon is employed by the residential sector

93%

of Oregon businesses say the length of the payback estimate is the most critical financial criterion for businesses considering installing a PV system¹

50%

of electric customers unable to install solar due to property ownership or siting constraints²

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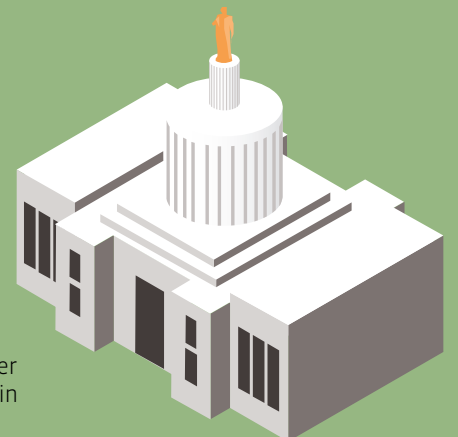
of Oregon solar was installed due to the 2016 Solar Development Incentive, a one-time incentive for utility solar³

NEEDS SUPPORT FROM STRONG LEGISLATION

Solar is clean energy. Oregon's solar industry supports four distinct market sectors: residential, commercial, community, and utility. Each market sector has unique attributes that provide benefits that strengthen Oregon's solar industry, Oregon's communities, and Oregon's electric system. When solar is paired with batteries and storage, the benefits include grid and community resilience. Solar plus batteries and storage will be a key component of disaster planning in communities.

While solar currently provides a small amount of Oregon's electricity, solar power is already making life better for thousands of Oregonians. An estimated 160 public and private businesses and organizations participate in Oregon's solar economy and employ over 3,900 Oregonians.

It is estimated that Oregon can achieve over 10% of our energy mix from solar in the near future. Good solar policy will be a key factor in achieving a smooth transition to a clean energy future, a strong and stable solar workforce, as well as grid and community resiliency in the face of natural disasters.



¹ Research to support a commercial and industrial solar marketing strategy. (pp III). (2014). <https://www.energytrust.org/wp-content/uploads/2016/12.pdf>

² Solar Development Incentive. Business Oregon. <https://www.oregon4biz.com/Oregon-Business/Tax-Incentives/Solar-Incentive-Program/>

³ Shared Solar: Current Landscape, Market Potential, and the Impact of Federal Securities Regulation. (pp 28). (2015). <https://www.nrel.gov/docs/fy15osti/63892.pdf>