Delaware, Maryland, Pennsylvania and Rhode Island

Eastern Distributed Solar Markets: Outlook and Analysis

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Policy Framework

State	Solar/DG Carve-Out (2012)	SREC Market	Total Market Scale	Long-Term Contracts	Prices	Geographic Limitations	Eligible for Other States
Delaware	0.4% PV (2012-2013)	Balanced – Oversupply?	40 MW (2012-2013); (~10 MW 2012 long-term contracts)	Statewide Program	Varies; fixed $240 - $260/MWh for small projects; trading prices currently much lower	In-state (BTM) or PJM delivery	Pennsylvania
Maryland	0.1% solar	~Balanced?	56 MW (2012) 114 MW (2013)	Not Generally Available	$180 - $218/MWh (SREC Trade)	MD distribution system	Pennsylvania, Delaware (grid supply)
Pennsylvania	0.051% PV (2012-2013)	Severe Oversupply	66 MW (2012-2013)	Periodic Utility RFPs	$10 - $30/MWh (SREC Trade)	In-state and PJM (limited MISO)	Ohio, Delaware (grid supply)
Rhode Island	Quasi-DG Carve-Out	N/A	15 MW (long-term contracts may include wind)	Bundled (FIT); accomodates net metering facilities	29.95 - 33.35 cents/kWh (2011 PV price ceilings)	In-state for FIT	New Hampshire

Policy Framework cont'd

State	Net Metering	Single Customer Meter Aggregation	Multiple Customer Aggregation	Interconnection	Rebate	Tax Credit	Property Tax
Delaware	19.5 (A)	All customers	All customers	18.5 (A)	State/Utility (varies)	No	No Exemption
Maryland	17 (A)	Gov't, NP	Not permitted	10 (B)	State ($0.50/W)	0.85 cents/kWh	BTM Exempt
Pennsylvania	18.5 (A)	All customers (2 miles)	Not permitted	9 (B)	No	No	No Exemption
Rhode Island	14 (B)	All customers (contiguous)	Municipal customers	4.5 (D)	No	Residential: 25% to $3,750 (currently expired for customer-owned systems)	Residential Exempt; also local option

Items to Watch

- Pending legislation
  - PA: HB 1580 (solar carve-out)
  - MD: HB 1187/SB 791 (solar carve-out); HB 864/SB 590 (community net metering)
  - DE: HB 247 (RPS freeze)
  - RI: HB 7820, SB 2407, SB 2408, HB 7159, SB 2112 (residential tax credit)
- Other
  - DE, MD, PA: PJM Net Metering Senior Task Force
  - DE: Contribution of fuel cells to solar carve-out, contracting results
  - RI: 2012 Distributed Generation Standard Contracts
  - PA: Ohio market for out-of-state SRECs, PA utility solicitations

Questions?