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How the Federal Government can Fuel Solar Growth in the U.S.
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Agenda

- What’s at Stake
- U.S. Market Projections
- Increasing the Momentum
- Summary
Growth Opportunity

- In 2000, China and the U.S. both had 5 solar equipment manufacturers.
Growth Opportunity

- In 2010, the U.S. has 10 solar equipment manufacturers....
Growth Opportunity

- ....China has 527
Federal PV Market Potential

- Total Physical Potential 5 - 10 GW
  - DoD controls 30 Million Acres of Land
  - Federal Government owns 1.5 Billion gross sq/ft of buildings

- Today Potential 1 GW
  - Assumes Current Incentives and Utility Rates
  - Assumes Agencies meet or come close to meeting EPACT goals
  - Assumes 20 year Contracting Authority
2008 - 2014 Federal Market Projections

Note: The data is based on both 3rd party numbers and SPWR estimates.
Increasing the Momentum

- Property Size Systems
  - Larger Systems Lead to a Higher Return

- Economics
  - Rebates
  - Radiation (Sun)
  - Rates

- Champion
  - Internal Solar Champion
System Sizing
Impact of Scale on Price

Bigger Systems Drive Costs Down and Increase Solar Momentum

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Lost Opportunities

100 kW

1,500 kW
Economics

Economic Factors

- High Solar Radiation
- Strongest state incentives
- High Rates
- Favorable Interconnection rules
Solar Champion

- Most agencies do not have a line item in their budget for solar.

- Most agencies do not have a team ready to plan & implement a project.

- Most agencies have not fully recognized all of the benefits of solar.
Summary

- **Property Size Systems**
  - Larger Systems Lead to a Higher Return

- **Economics**
  - Rebates
  - Radiation (Sun)
  - Rates

- **Champion**
  - Internal Solar Champion
"The days of inexpensive, convenient, abundant energy sources are quickly drawing to a close. We must act now to develop the technology and infrastructure necessary to transition to other energy sources."

U.S. Army Corps of Engineers
Army Engineer Research and Development Center (ERDC)