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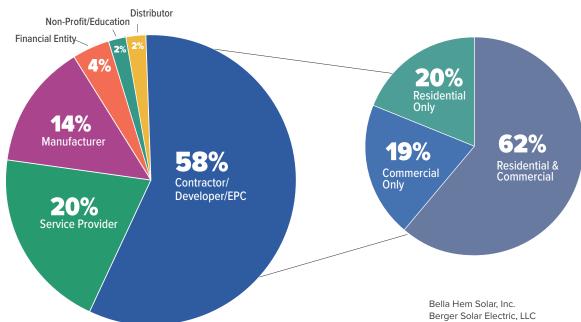
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5

THE NEM FIGHT

PUTTING IT ALL INTO PERSPECTIVE

Twenty years ago, in 2003, California had 5,000 net metered solar customers. The state's NEM program, still in pilot mode, had been available for only a few years, was capped at 0.5% of the utility's electricity demand, and consumers had to shell out \$70,000 for a simple residential system priced at well over \$12/watt. But the 2000/2001 Electricity Crisis spurred a change in people's thinking. Solar was no longer an expensive gadget of the environmental movement but an investment in self-reliance and cost-savings. Suddenly, solar had become common sense to mainstream consumers.

Three years later, California passed the Million Solar Roofs bill (SB 1 - Murray) which, among other things, increased the cap on NEM 10-fold. With this bill, California got serious about distributed solar, entering an era of steady growth during which the state added on average 200 MW annually for the next 8 years.

Come 2013, the price of solar had dropped 50% and nearly 5,000 people were going solar *every month*. With steady year over year growth, California's solar market and its suite of pro-distributed solar policies were the paragon of the clean energy world and the ire of utilities.

That ire found its way into a little known bill: AB 327 authored by Henry Perea, a young legislator out of Fresno. Here is where the cost shift concept debuted and where the many and varied attacks on distributed solar began. Buried in this bill was an order that the CPUC reform NEM, and three years later, despite a backdrop of ambitious 100% clean energy goals, the CPUC passed "NEM 2.0," reducing the solar market 20% overnight, not to recover until 2020.

As the readers of this Annual Report know, the attacks on NEM were far from over. The utilities were not satisfied with their 20% cut in the market. With their ever-rising prices combined with the emergence of energy storage, the threat distributed solar posed to their business model was now greater than ever. And so, in August 2020, the "NEM-3" proceeding began. For the next 2 years, the California solar industry would withstand the biggest and most well-funded attack on consumer solar ever experienced.

In response, we mounted our own powerful and unified effort, including mobilizing solar users through the Solar Rights Alliance and building a coalition that was 600 organizations strong, to beat back the solar tax, defend against retroactive changes to existing customers, and salvage a future for



Save Our Solar Jobs Rally in Los Angeles, January 13, 2022

solar plus storage. More than 6,000 people took to the streets – an unprecedented number for any clean energy movement – and 170,000 people signed public comments – also a record. We filed over 1,000 pages of legal arguments in favor of distributed solar and storage and we defended our businesses and customers on multiple fronts at the CPUC, in the legislature, and in various other state agencies.

The utility business model is not set up to embrace consumer generation and the more successful we become, the greater the resistance. They will come back. They already have with the newly unveiled fixed charge proposals. But so long as we keep evolving, keep working together, and keep providing quality products for our consumers, the utilities' backwards-thinking will ultimately fail.

Looking ahead, California needs 85 GW of additional capacity by 2035 – that's just 12 years from now. The majority of this new

capacity will need to be solar. It has taken California 25 years to build 30 GW– 50% of which is distributed. This means California needs a whole lot more distributed solar if it is to double its clean energy in half the time, to say nothing of what's needed for energy storage to tie it all together.

We must be proud of our efforts so far, wideeyed about the fights yet to come, and yet bullish about the future of our industry. Some say these past two years were the most critical, but we believe the next two -- 2023 and 2024 -- are going to be our real defining moment. This is when our mettle will truly be tested as we adapt to policy changes and set our sights on building a million solar-charged batteries by 2030.

2022 PROGRAM HIGHLIGHTS

Streamlined Permitting

For several years now, CALSSA has worked with the National Renewable Energy Laboratory (NREL), a branch of the federal Department of Energy, to create SolarAPP+, automated permitting software for residential solar and energy storage systems. In 2021, we won approval for a \$20 million grant program to help cities and counties adopt SolarAPP+. We then leveraged the grant program in 2022 to pass the Solar Access Act (SB 379, Wiener) mandating use of the program in nearly every city and county in the state by September 2023 and 2024, depending on population. As the solar industry gets squeezed on the economics of NEM, it is crucial we lower soft costs, especially for batteries, to keep providing maximum value to our customers.

Virtual Power Plants

At the end of 2022, there was 1 GW of customer-sited energy storage installed in California. This is collectively the biggest battery in the world, which stands ready to provide power and support our electric system both during energy emergencies and on a daily basis. CALSSA continued its groundbreaking work to create new programs enabling customers to receive compensation for discharging their batteries through this leading-edge approach. For example, the Legislature allocated and earmarked nearly \$2 billion for new programs on emergency reliability for the electric grid. CALSSA advocated for a portion of that money to pay battery-based virtual power plants to discharge when statewide supplies are tight.

Contractor Licensing

In 2021, the Contractors State Licensing Board voted to strip C-46 solar contractors of their ability to install energy storage. In response, CALSSA sued and won. In 2022, we continued to lead negotiations, build coalitions, resist irrational rules, and watchdog the agency. In June of last year, the CSLB voted to advance new rules to restrict C-46 from installing batteries larger

than 80 kWh. The agency was supposed to begin a formal rulemaking last fall but CALSSA, working with our law firm, Shute, Mihaly & Weinberger, submitted data on the challenges with those restrictions, especially for the off-grid market, and to call for the use of CEQA in considering the environmental impacts of limiting solar contractors and their workers from installing clean energy. As of yet, all new restrictions have been kept at bay. Meanwhile, California's solar contractors have installed more than 50,000 batteries since that original vote in 2021 without a single reported incident to justify licensing rule changes.

Consumer Protection

In 2022, CALSSA was the lead organization to push back on the CPUC's public "Watch List." The list on the CPUC's website was intended to be contractors who had violated the requirements or laws of the CPUC, CSLB or DFPI. Instead, many if not most of the more than 150 contractors placed on the list initially were there due to clerical or utility error. Thanks to our advocacy, dozens of our members were removed from the list. We are currently working with the Commission to clean up the process for listing contractors in the future.

Solar on Multifamily Housing

CALSSA fought for the expansion of solar on multifamily housing projects through several venues. First, we defeated SB 1385 (Cortese) which would have threatened the growth of California's multifamily solar housing initiatives by inserting utility-owned rooftop solar systems into the market, creating confusion and eroding benefits to renters and property owners alike. We also participated in a CPUC proceeding which, with our support, resulted in the elimination of step-downs in incentives for Solar on Multifamily Affordable Housing (SOMAH) projects. Finally, we convinced the CPUC not to include virtual net energy metering (VNEM) from its NEM-3 decision and recognize that VNEM and SOMAH



Photo courtesy of Grid Alternatives

programs are fundamentally different from other types of NEM tariffs. Through regulatory and legislative venues, we continue to advocate for a viable multifamily solar tariff and program.

Solar Water Heating

CALSSA has worked with SoCalGas for the last two years to launch and expand a solar water heating incentive program. After starts and stops, the program is now open with updated rules. Expansion to multifamily is underway. At the CEC, we have helped guide a proposal to expand the building standard to include mandatory solar water heating for homes that install heated pools or add heating to existing pools.

New Construction Mandate

In 2021, we worked with the California Energy Commission on the solar and storage mandate for new commercial and high-rise multifamily buildings. Ahead of the mandate taking effect in January 2023, we blocked potential rollbacks such as to the storage component for 208V 3-phase buildings. We also blocked three attempts in the legislature to rollback the solar mandate for new homes, which has been in place since 2020.

Codes and Standards

CALSSA engaged in the International Code Council's (ICC) process to develop the International Residential Code (IRC) and the structural provisions of the International Building Code (IBC), which California uses as the basis for its codes. In total, ICC considered 59 proposals that would directly impact the PV and storage industry, covering roof mounted PV, ground mounted PV, building integrated PV, solar carports, indoor batteries, outdoor batteries, and more. Overall, we made progress to remove barriers to installing solar PV and batteries as well as protected important existing provisions that allow for safe and efficient installations. Notably, the ICC approved our proposal to allow ESS to be placed on the side walls and top half of the back wall of garages without also installing bollards or curbs. This proposal went into effect in California in January 2023.

Legislative

CALSSA's lobbyist and legislative team tracked and analyzed over 3,000 bills to evaluate their effect on the solar industry. Of those, CALSSA monitored dozens of bills and took support or oppose positions on twenty bills during 2022. Significant wins included Governor Newsom vetoing AB 1078 (Patterson) to exempt homes destroyed by fire from the solar mandate when they rebuild and stopping SB 1385 (Cortese), a bill that would have confused the multifamily affordable housing market. Thanks to significant user mobilization, CALSSA also defeated the solar tax language within the Diablo Canyon extension bill. Despite valiant attempts by CALSSA advocates, members, and allies to stop it, the legislature passed AB 2143 (Carillo) which declares most commercial projects to be public works.

SUNPAC

In 2022, CALSSA organized PAC fundraisers for 6 members of the state legislature: Senators Atkins and Wiener and Assembly Members Aguiar Curry, Holden, Ward, and Wicks. These events were attended by local companies representing the solar industry in California and helped to educate members about the breadth and depth of our industry and workforce.

Our fact sheets and webinars are available on our website at **www.calssa.org/members-only.** Be sure to use these resources to stay informed.

OUR TEAM



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Brad HeavnerPolicy Director



Elise De GrandeOperations Director



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Justin McCarthyMembership Director



Meghan Vincent-JonesMarketing Director



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CALSSA'S

2022 EVENTS

CHAPTER MEETINGS

CALSSA resumed our in-person Chapter meetings in 2022. CALSSA's six Chapters are where professionals from across the storage, PV, and thermal value chain get together, network, share best practices, and learn about the latest industry developments. In 2022, we hosted 12 chapter events at local breweries around the state. Meetings are open to all employees at member companies so if you have not attended a meeting yet, make sure to join us in 2023! You can sign up for chapter updates on our website.



CALSSA Bay Area Chapter Meeting, photo courtesy of BLUETTI

VIRTUAL EVENTS

In addition to events related to NEM, CALSSA also organized a series of in-person and virtual events to educate our members about product offerings and the regulatory landscape.

In the Spring, we once again organized our Product Expo Series featuring thirty different companies taking part in short virtual demonstrations while being interviewed by industry experts that were spread out over five days. Presenters included software, racking/mounting, energy storage and module companies.

CALSSA organized nine different webinars over the course of 2022 with topics including NEM 3, Changes to Rule 21 Interconnection Process for Commercial projects, solar permitting and more.









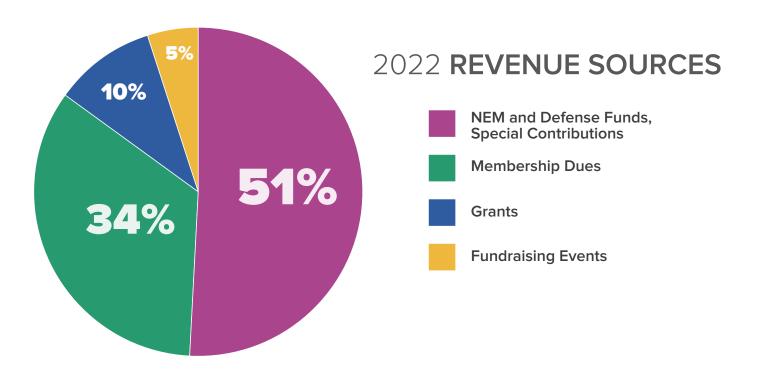






CALSSA's 2022 Online Product Expo

RESOURCES & EDUCATION



MEMBER EDUCATION

Member companies stayed ahead of the competition in 2022 with CALSSA's help by getting timely, detailed, and reliable information that they could use to navigate the tumultuous California market. In 2022, CALSSA members received:



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North Bay Solar Services North Coast Solar (Energy Equity) North State Solar Energy Northern Electric and Power LLC Northern Pacific Power Systems

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