Where Are We Now: Pandemic Impacts on the Southeast Energy Sector

October 20, 2020, 10 a.m.
Welcome!

Tell us your name and your favorite fall activity in the chat.
The Southeast Efficient Energy Alliance (SEEA) promotes energy efficiency as a catalyst for economic growth, workforce development and energy security across 11 southeastern states including Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee and Virginia.
Areas of Work

- Energy Efficiency Policy
- Built Environment
- Energy Efficient Transportation
- Regional Investments
Today’s Presentation

Agenda:
I. Regional Policy & Utility Program Updates
II. Energy Debt Crisis
III. Energy Industry Economic Impact
IV. Resources
V. Q&A

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Communications Manager

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Built Environment Project Manager
Regional Policy & Utility Program
Updates
Utility Disconnection Suspensions

May 2020

- Legislative Order
- Voluntary Agreement
- Commission Order

October 2020

- Expired
- Commission Order
Energy Efficiency Legislation Status

No Movement

Georgia
HR 1430

South Carolina
H 5335

Enacted or Approved

Florida
HB 7018

Mississippi
HB 1788
SB 3044
HB 1793

South Carolina
H 4940
Public Service Commissions

Elections:
Alabama PSC
Georgia PSC

Appointments:
Florida PSC
Mississippi PUS
South Carolina PSC

visit vote.org for election information in your area
Energy Efficiency Regulatory Proceedings

**Rate Cases**
- Arkansas
- Kentucky
- Mississippi
- North Carolina
- South Carolina
- Virginia

**EE Rules**
- Florida
- Louisiana

**DSM**
- Florida

**SEEM**
- Southeast Energy Exchange Market
Utility Energy Efficiency Programs

Paused
- Residential on-site programs

Adapted
- Energy efficiency savings kits

Innovative
- Targeting empty facilities
Utility Programs Impacts

Current Status of Disrupted Energy Efficiency Programs

- Fully Resumed
- Partially Resumed
- Not Operating

Introduction of New Energy Efficiency Programs or Adaptations

- Made No Adaptations
- Made Adaptations
- New Programs
Energy Efficiency Program Design

Wear masks in the field
Reduce points of contact
Additional safety measures
  • building-performance.org
Energy Efficient Transportation Policy & Program Updates

State Policy
- Alabama
- Florida
- South Carolina
- North Carolina
- Tennessee
- Virginia

Programs
- Utility Fleets
EV Charging Infrastructure

**ChargePoint**
- 2.5 million stations by 2025

**EVgo**
- 2,700 new stations next year

**Pivet**
- Largest DC fast charging installation in the Southeast

**Plug In SC**
- Standardize EV charging signage

**Electrify America**
- Expanding charging depots in the region
Energy Efficient Transportation Partnerships

Southeast EV Regional Initiative

Electric Transportation Information Exchange
What’s keeping you from business as usual?
Energy Debt Crisis
Utility Sector Economic Recovery Efforts

**Alabama**
- Huntsville Utilities & TVA

**Georgia**
- Georgia Power Project Share

**North Carolina**
- State funds to support utility bill payment

**Tennessee**
- Knoxville Utilities Board & TVA
Energy Insecurity before COVID-19

Experience any energy insecurity
- South: 15.4
- West: 8.1
- Midwest: 7.4
- Northeast: 6.2

Receive disconnect notices
- South: 7.5
- West: 3.2
- Midwest: 2.7
- Northeast: 3.8

Reduce consumption of food or medicine to pay for energy
- South: 10.8
- West: 5.5
- Midwest: 5
- Northeast: 4

Struggle to maintain healthy indoor temperature
- South: 5
- West: 2.5
- Midwest: 2.2
- Northeast: 3.1

Units: households (in millions)
We’re still collecting and analyzing data. What have we learned that can increase energy efficiency in homes? What are the barriers to long-term implementation of temporary programs and policies? How can we keep residents struggling with energy debt engaged in energy efficiency programs?
Commercial & Small Business Impacts

1 in 5 small businesses are closed
Paycheck Protection Program is largely gone
Economic recovery is losing momentum

Energy Insecurity in the Southeast
What would help you get back to business as usual?
Energy Industry Economic Impacts
Energy Efficiency Program Workforce

How much of your EE workforce (directly employed or indirectly contracted) has been affected by reduced hours or job losses?

Source: Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020, E4 the Future
Southeast Energy Efficiency Workforce

Cumulative CE Jobs Lost Mar-Sept 2020

Source: *Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020*, E4 the Future
Southeast Clean Energy & Energy Efficiency Workforce

% Clean Energy & Energy Efficiency Cumulative Job Losses by State

Source: Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020, E4 the Future
Southeast Energy Efficiency Workforce

% Job Growth in EE Workforce Sept 2020

Source: Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020, E4 the Future
Southeast Energy Efficiency Workforce

SE Job Losses and Gains Mar-Sept 2020

Source: Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020, E4 the Future
Southeast Energy Efficiency Workforce

SE Job Losses and Gains Mar-Sept 2020

Source: Clean Energy Employment Initial Impacts from the COVID-19 Economic Crisis, September 2020, E4 the Future
Many manufacturers are **moving forward**

Source: Cox Automotive Mobility
Energy Efficient Transportation Industry

3 states; over $1 billion invested; 1,210 jobs

Economic Development News

- Mercedes-Benz U.S. International
- SK Innovation
- Arrival
EV U.S. Sales Forecast

$8.5 M in new EV sales expected by 2025

Source: Cox Automotive Mobility
### EV Market Updates

#### Coming in 2021

<table>
<thead>
<tr>
<th>Model</th>
<th>Model</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ford Mustang Mach-E</td>
<td>Volkswagen ID.4</td>
</tr>
<tr>
<td>GMC Hummer EV SUT</td>
<td>Audi e-tron GT</td>
</tr>
<tr>
<td>Tesla Cybertruck</td>
<td>Volvo XC40 Recharge</td>
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<tr>
<td>Polestar 2</td>
<td>Rivian R1S</td>
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<tr>
<td>Nissan Ariya</td>
<td>Hyundai IONIQ Electric</td>
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<tr>
<td>Mercedes-Benz EQC</td>
<td>BMW iNext</td>
</tr>
</tbody>
</table>
EV Consumer Interest

55% of buyers are more interested in EVs post-COVID

Source: Cox Automotive Mobility
National Drive Electric Week

Socially-distant EVs at the Market
Photo Credit: Mark Bentley, Executive Director, Alabama Clean Fuels Coalition

Women and the EV Experience Virtual Panel
Photo Credit: Blue Ridge EV Club
Construction & Related Industries

Essential workers
• Most states, especially the Southeast

Delays
• Stem from additional safety protocols or supply chain issues

Virtual inspections & review processes
• Can take longer depending on interaction with the customer
Economic Impact to Commercial Buildings

Product type
• Determines demand and load

Improving energy efficiency
• Motivation to make commercial buildings more efficient
How long do you expect before normal business returns?
Resources
Q & A
Coming Soon

**Late October** – New COVID-19 Resources

**Mid-November** – Election Highlights

**December 8-10** – What’s Next Event Series
Our #IsolationCreations
We stayed home and got creative!

- Pumpkin Garden Helpers
- Home Office Upgrade
- Home School
- Painting
Our #IsolationCreations
We stayed home and got creative!

Drawing

Weekend walks to Deepdene Park
Thank You

SMART ENERGY. STRONG ECONOMY. FOR ALL.

WWW.SEEALLIANCE.ORG
Additional Resources

- Faces of EE from E4 the Future
  - Learn more: The stories beyond the numbers.

- Q3 Highlights: July – September 2020
  - Read more: For full legislative and regulatory updates

- Effects of COVID-19 on Utility Energy Efficiency Programs
  - Recording: Originally aired: August 18, 2020
  - Slides

- Southeast in Time of Crisis: Impacts and Innovations in Energy Efficiency
  - Recording: Originally aired: May 20, 2020
  - Slides
# Regulatory Procedures

<table>
<thead>
<tr>
<th>State</th>
<th>Commission Practices</th>
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</thead>
<tbody>
<tr>
<td>AL</td>
<td>Proceedings <em>live streamed</em></td>
</tr>
<tr>
<td>AR</td>
<td>Physical attendance discouraged; daily filings <em>posted online</em></td>
</tr>
<tr>
<td>FL</td>
<td>Proceedings <em>live streamed</em></td>
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<tr>
<td>GA</td>
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<tr>
<td>LA</td>
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<tr>
<td>MS</td>
<td>Proceedings <em>live streamed</em></td>
</tr>
<tr>
<td>NC</td>
<td>Most hearings <em>virtual</em>; some postponed</td>
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<tr>
<td>SC</td>
<td>Proceedings <em>live streamed</em></td>
</tr>
<tr>
<td>TN</td>
<td>Transitioning to <em>virtual</em></td>
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<tr>
<td>VA</td>
<td>Proceedings <em>live streamed</em></td>
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# 2021 Legislative Sessions

<table>
<thead>
<tr>
<th>State</th>
<th>Session Dates</th>
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<tbody>
<tr>
<td>AL</td>
<td>February 21 – May 31</td>
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<tr>
<td>AR</td>
<td>January 11 – April 24</td>
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<tr>
<td>FL</td>
<td>March 2 – April 30</td>
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<tr>
<td>GA</td>
<td>January 11 – April 24</td>
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<tr>
<td>KY</td>
<td>January 5 – March 31</td>
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<tr>
<td>LA</td>
<td>April 12 – June 10</td>
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<tr>
<td>MS</td>
<td>January 5 – April 2</td>
</tr>
<tr>
<td>NC</td>
<td>January 13 – June 30</td>
</tr>
<tr>
<td>SC</td>
<td>January 12 – June 15</td>
</tr>
<tr>
<td>TN</td>
<td>January 12 – May 7</td>
</tr>
<tr>
<td>VA</td>
<td>January 13 – February 13</td>
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