

Michael Cromer, Rick Moseley, Jim Robinson, Steve Krug, Eric Light, Mark Connolly, Elisabeta Dalea

## Generation / Solar / Smart Grid notes

### Generation

#### CHP

- ITC Feds by 12/25 Safe Harbor needed
- Works on its own with oct incentives
- Cheap gas equals cheap onsite electricity

#### Nuclear

- Need 20 plus years mix of energy types to get nuclear
- Waste hauling holds back industry
- Handled at utility scale level
- Difficult for SEI to impact

#### Peakers

- Driven by AI Data Centers
- Massive prime mover backlog for Jenbacher, CAT eef
- No incentives needed (business decision)
- Administration cutting regulations to promote on-site power plants

#### Solar

- Safe Harbor and construction start by July 2026
- Safe Harbor by 12/31/2025 to be in line for full 30% ITC
- ITC is weeding out the players
- Funding – C-PACE should benefit from ITC sunseting

#### Batteries

- Need to understand why the battery market doesn't work
- Presenter? / Topic?

Policy – Good topic for future across all

#### Micro-Grid

- Is this financing viable any longer?
- Option for off-grid data center

#### Data Center TOPIC

- Impacts to surrounding players and utilities