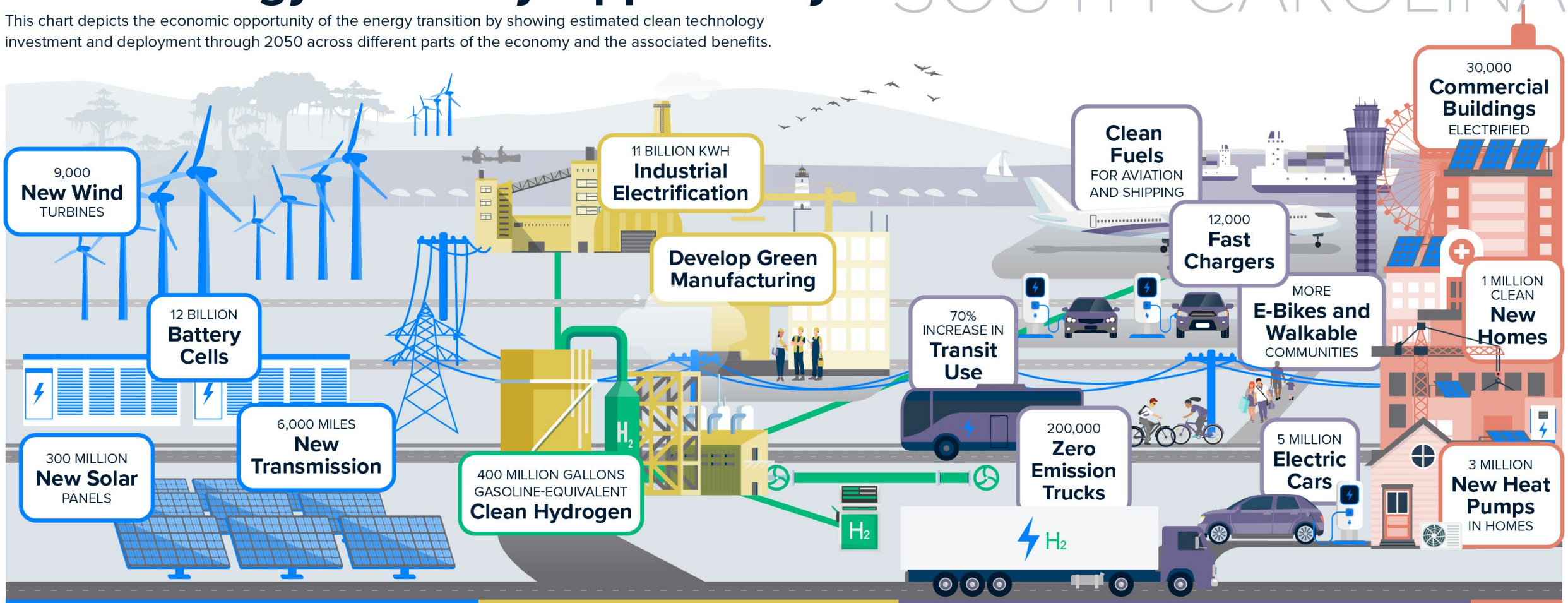
RMI
ENERGY. TRANSFORMED.

Toward a Clean Energy-Led Economic Development Strategy for South Carolina

Clean Energy Economy Opportunity

SOUTH CAROLINA

This chart depicts the economic opportunity of the energy transition by showing estimated clean technology investment and deployment through 2050 across different parts of the economy and the associated benefits.



Electricity 24 | **Industry** 20 | **Transportation** 33 | **Buildings** 4

Size of bars based on current annual greenhouse gas emissions (million metric tons CO_2e)

HUMAN IMPACT

60,000 New Clean Economy **JOBS**

$3 Billion per year saved from AVOIDED DEATHS

1,100 FEWER YEARLY **Asthma Attacks**

$11 Billion Potential Federal Investment from IRA

This data came from the Net-Zero America project and the Energy Policy Simulator and may not align with other state-specific modelling. Additional information at: rmi.org/state-graphics

Seizing the Clean Energy Opportunity in 'Three Cs'

Competitiveness

Industry Prioritization

Strategic Industrial Policy

Public-Private Coordination

Federal Incentive Uptake

Constraints

Policy Environment

Innovation Ecosystem

Capital Availability

Data Gaps

Education & Skills Gaps

Supply Chain Networks

Coordination

- Have a plan for **working with federal entities** to maximize the benefits from recent legislation.
- Coordinate between state agencies around **shared roadmaps, strategies, and solutions**.
- Develop **mechanisms for coordinating between policymakers and private industry** in strategic industries.
- Proactively **communicate with community groups** to understand and overcome local investment barriers.

Three Cs: Competitiveness

South Carolina has a **once-in-a-generation** opportunity to take advantage of private momentum and public incentives

South Carolina is likely to be more competitive in energy transition industries where it has **related existing capabilities.**

Most **states lack coherent or cohesive industrial strategies** for priority energy transition industries.

The use of incentives to attract strategic projects can bolster competitiveness and economic development in a region if targeted appropriately and when conducted with **best-practice program design**.

Three Cs: Constraints

South Carolina's economy and population is **booming**, creating capacity challenges and investment opportunities.

South Carolina has a competitive manufacturing industry that positions it well to **attract new cleantech investments**.

Corporate demand for 24/7 clean electricity and green supply chains is creating growing **siting, permitting, and transmission challenges**.

Growing demand is creating worker shortages and **skills gaps**.

Community opposition amid legacies of environmental pollution and economic inequality will have to be **proactively managed**.

"Valley of Death" challenges in converting academic knowledge and capacity to entrepreneurship and products are ongoing.

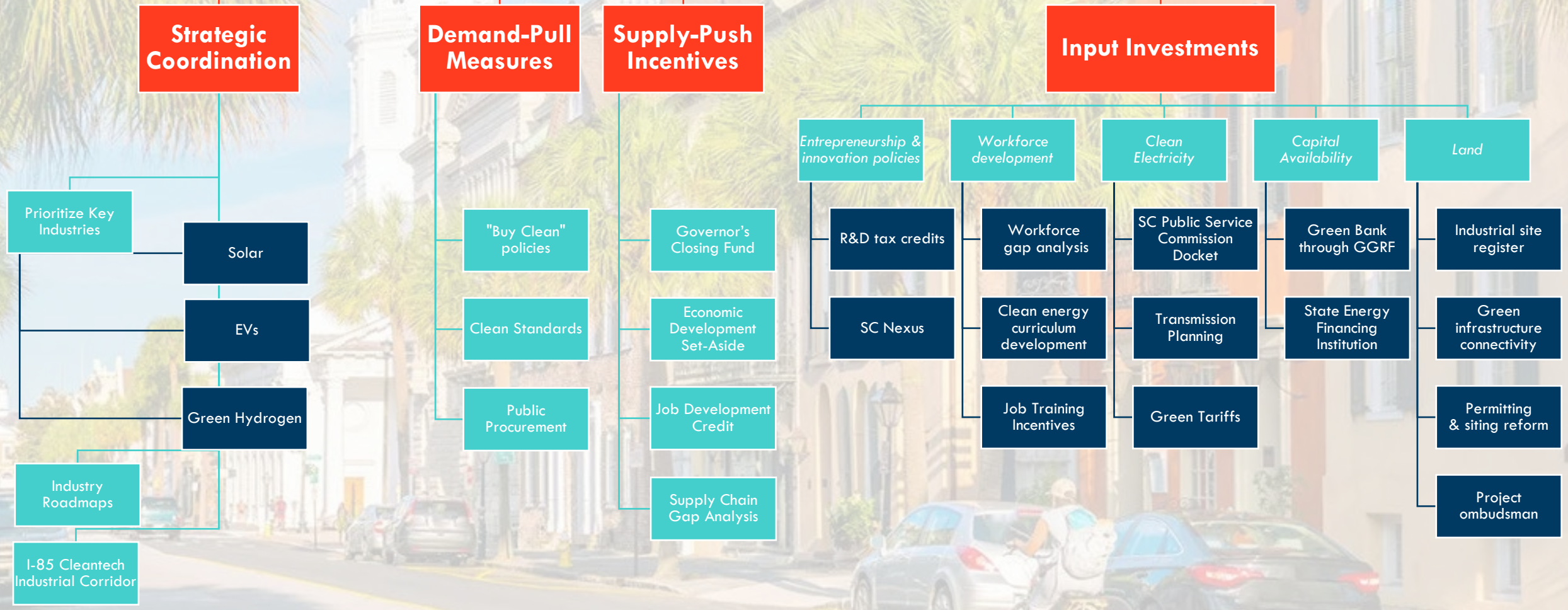
Three Cs: Coordination

South Carolina should increase its efforts to coordinate with the federal government to **maximize benefits of new legislation**.

Inter-agency coordination, in efforts such as PowerSC, can be powerful mechanisms of economic change.

Public-private coordination can help create **globally competitive clusters** in strategic industries, such as along the I-85 corridor.

A Clean Energy-Led Industrial & Economic Development Strategy for South Carolina



The IRA Is a Generational Opportunity for South Carolina

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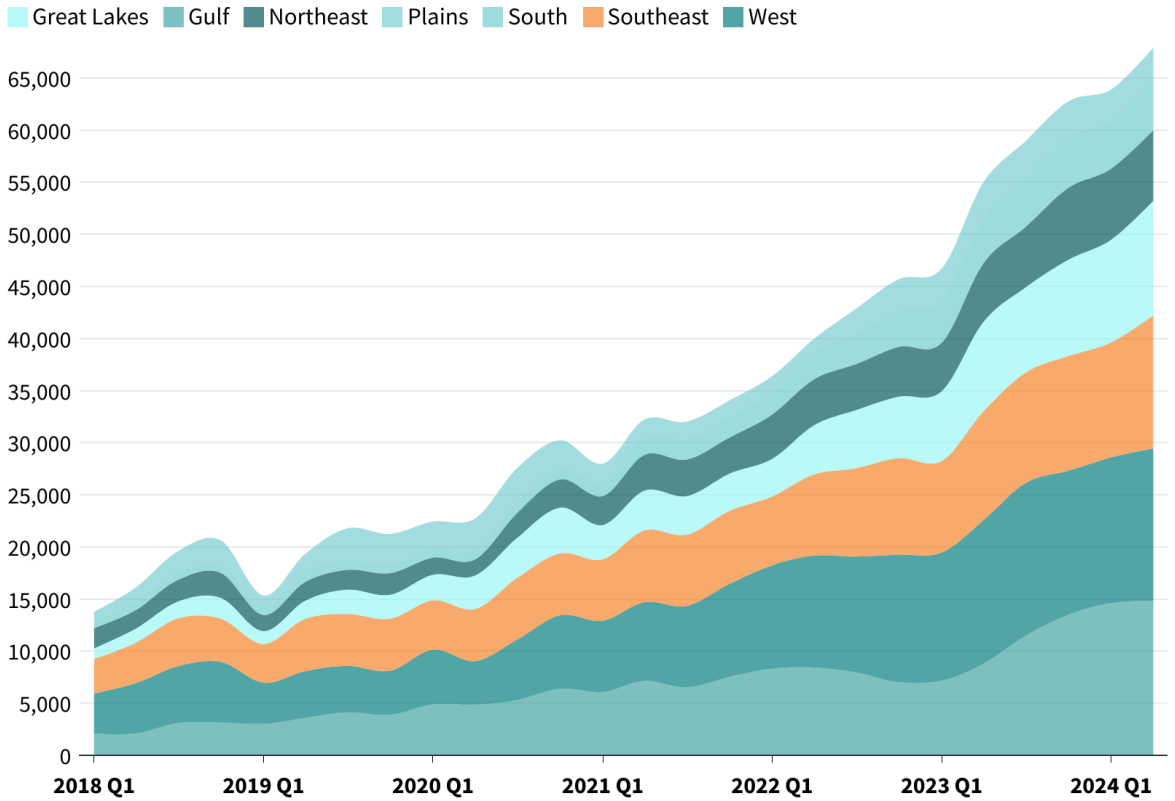
The clean energy economy is booming

There is a generational opportunity for South Carolina to get in on the ground floor of the energy transition

Clean energy investment in the United States is almost 5x that of 2018

In the Southeast, quarterly investment has more than doubled since the passage of the IRA in 2022, reaching $13B a quarter.



Investment in Millions USD.

Chart: RMI Graphic • **Source:** Clean investment Monitor

The big winners since the passage of the Inflation Reduction Act (IRA)

Growth in cumulative investment since 2018, indexed to Q2-2022. (2022-Q2=100)

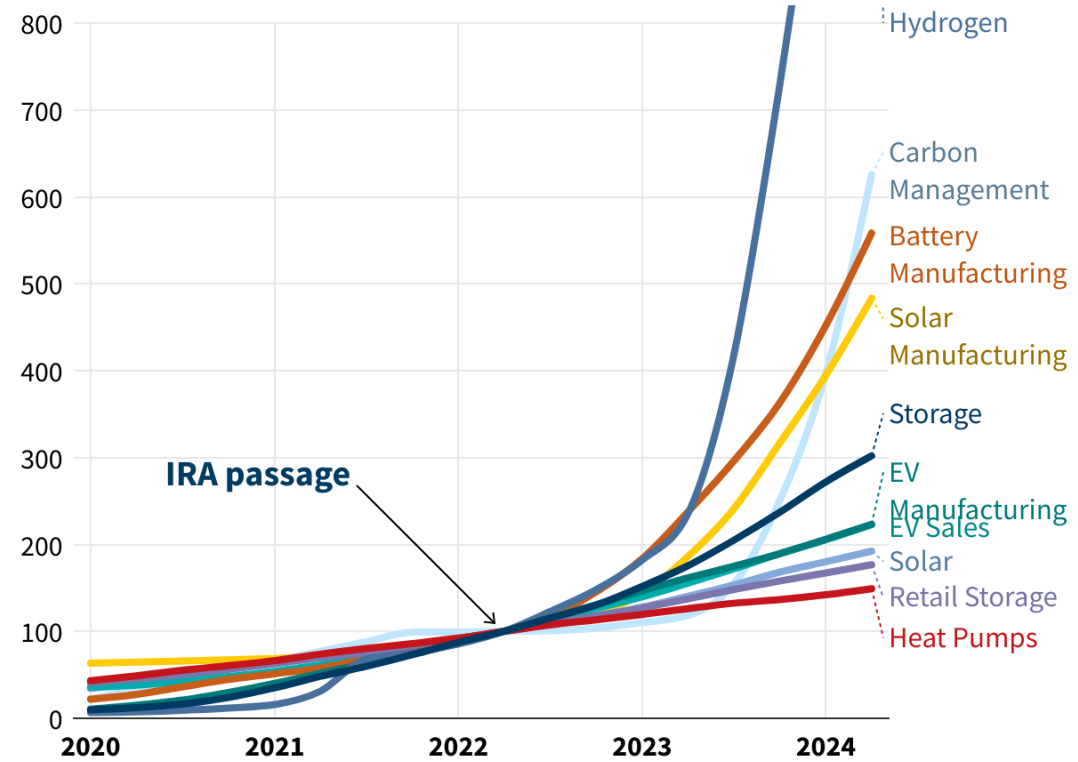


Chart: RMI Graphic • **Source:** Clean Investment Monitor

RMI

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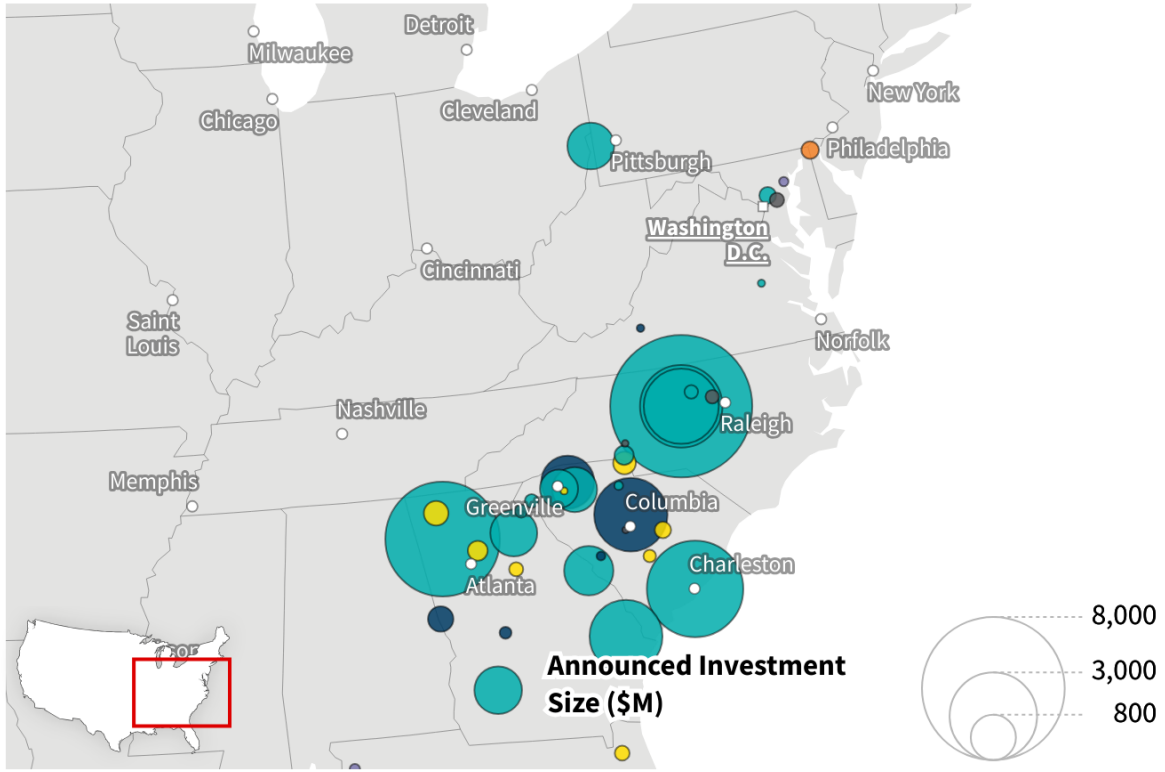
Especially clean energy manufacturing

South Carolina has already seen an explosion in manufacturing projects, showing the hype is real.

Cleantech manufacturing is booming in the Southeast

Batteries Electrolyzers Fueling Equipment Solar Wind Zero Emission Vehicles



Map: RMI • **Source:** Clean Investment Monitor

South Carolina has seen nearly $12B in cleantech manufacturing announcements, and over $3B in realized investment since the IRA

State	Total Manufacturing Announcements ($M, 2022–24)	Total Manufacturing Investment, ($M, 2022–24)	National Share (%)
Georgia	15,351	10,640	11.9%
North Carolina	14,210	7,138	8.0%
South Carolina	11,858	3,098	3.5%
West Virginia	796	507	0.6%
Delaware	81	86	0.1%
Virginia	415	66	0.1%
Florida	72	56	0.1%
Maryland	288	52	0.1%

Table: RMI • **Source:** Clean Investment Monitor

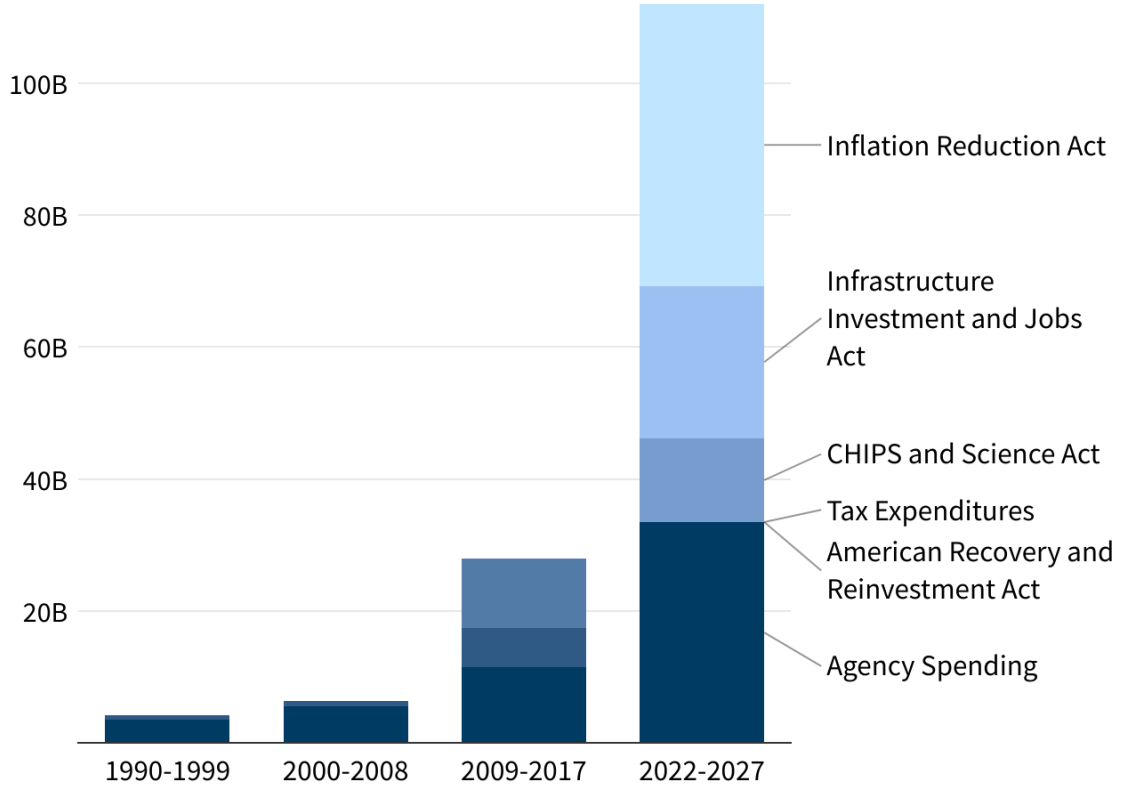
RMI

IRA + IIJA + CHIPS = A big deal

Unprecedented federal support puts US industries in a position to compete globally

Federal Spending on Climate Will Exceed $100B Annually

Spending will more than triple historic levels.

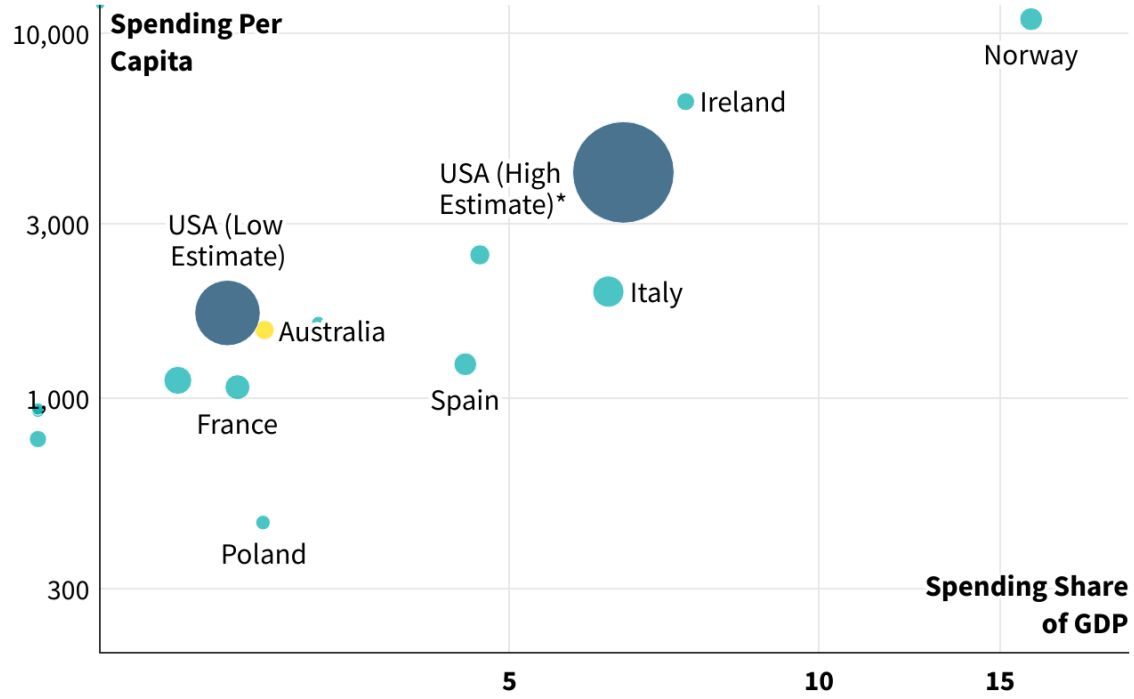


Average annual spending, adjusted for inflation. Note that the time periods shift from 2000--2008 to 2009--2017 to 1) consolidate the impact of the ARRA to one bar, and 2) address missing data between 2018 and 2021. Values are based on RMI estimates using agency spending data from the GAO, tax expenditure data from the JCT, and internal analysis on 2021-2022 legislation.

Source: RMI • Created with Datawrapper

Clean Energy Spending Among Developed Countries since 2020

Even using conservative estimates, the United States has dedicated the most spending towards clean energy policies since COVID and is among the highest spenders relative to population and GDP. This grows significantly when accounting for uncapped tax credits.

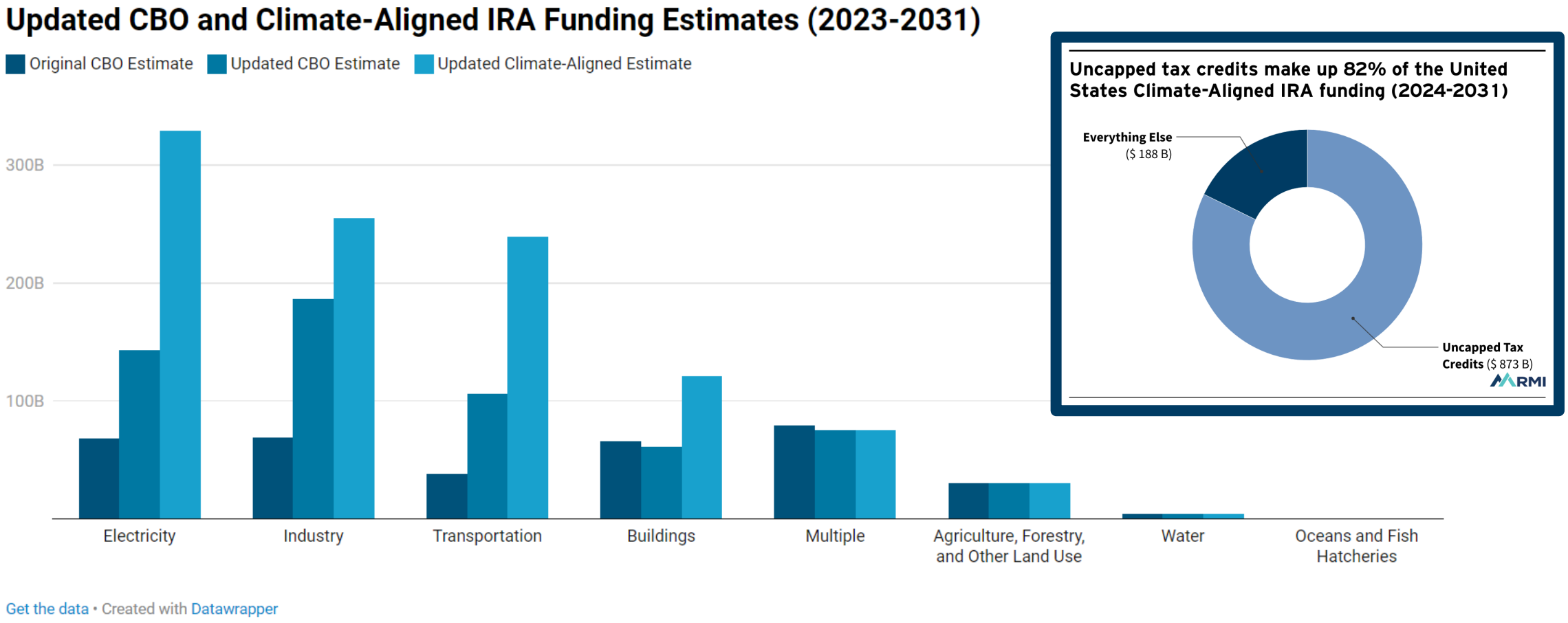


*Spending figures are for clean energy investment support only and exclude energy affordability measures. *Uses the Goldman Sachs $1.2 trillion estimate of overall IRA incentives, rather than the official CBO $369 billion estimate.*

Chart: RMI Graphic • **Source:** IEA Government Energy Spending Tracker • Created with Datawrapper

Headline IRA numbers undersell its potential

Uncapped tax credits could lead to ~$1 trillion spending bill



South Carolina's Clean Energy Economy

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Boom times for South Carolina

The Palmetto State is growing at a rapid pace, creating opportunities and putting pressure on infrastructure

Third-Fastest growing economy in the region

GDP growth since 2012, Index 2012=100

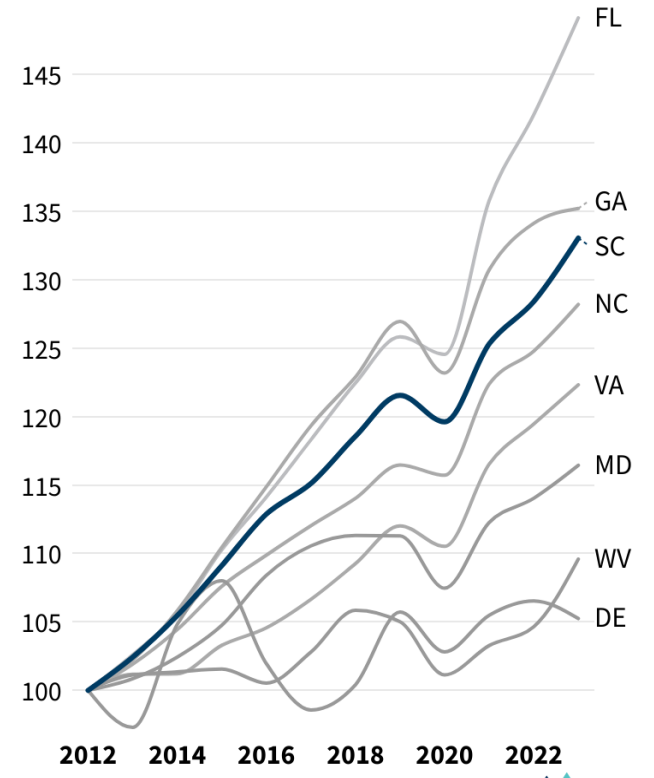


Chart: RMI • **Source:** BEA

Second-Fastest Growing Population in the Region

Population Growth since 2012, Index 2012=100

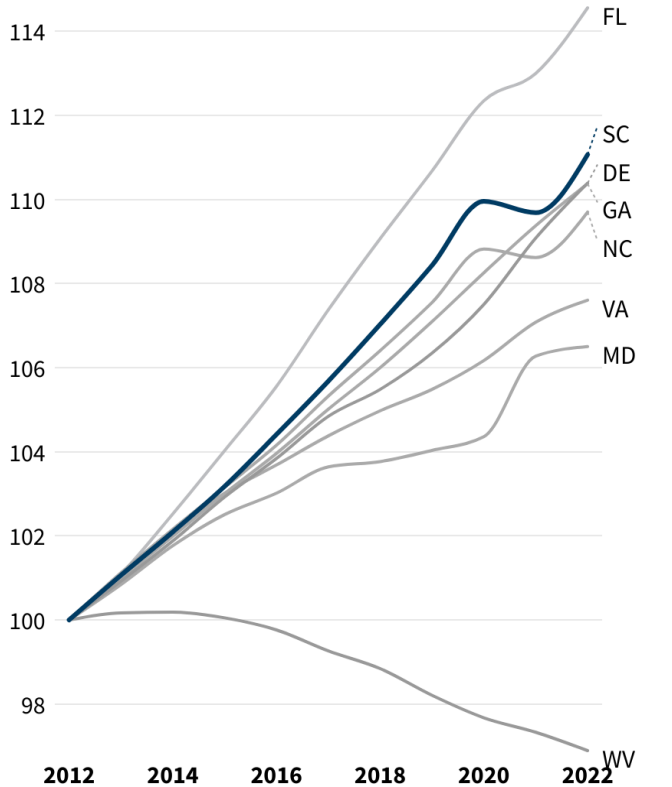


Chart: RMI • **Source:** BEA

Third-Fastest Energy Consumption Growth Within the Region

Energy Consumption Growth since 2012, Index 2012=100

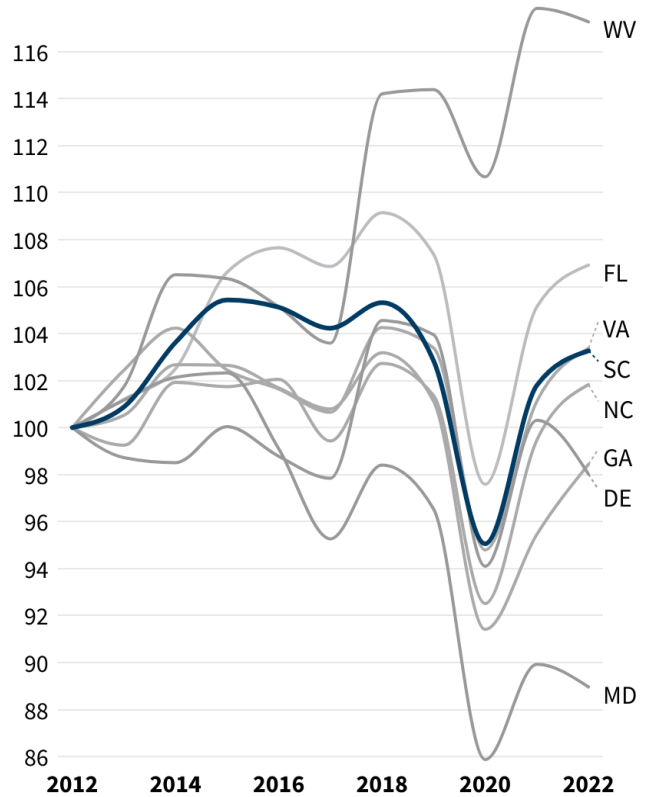
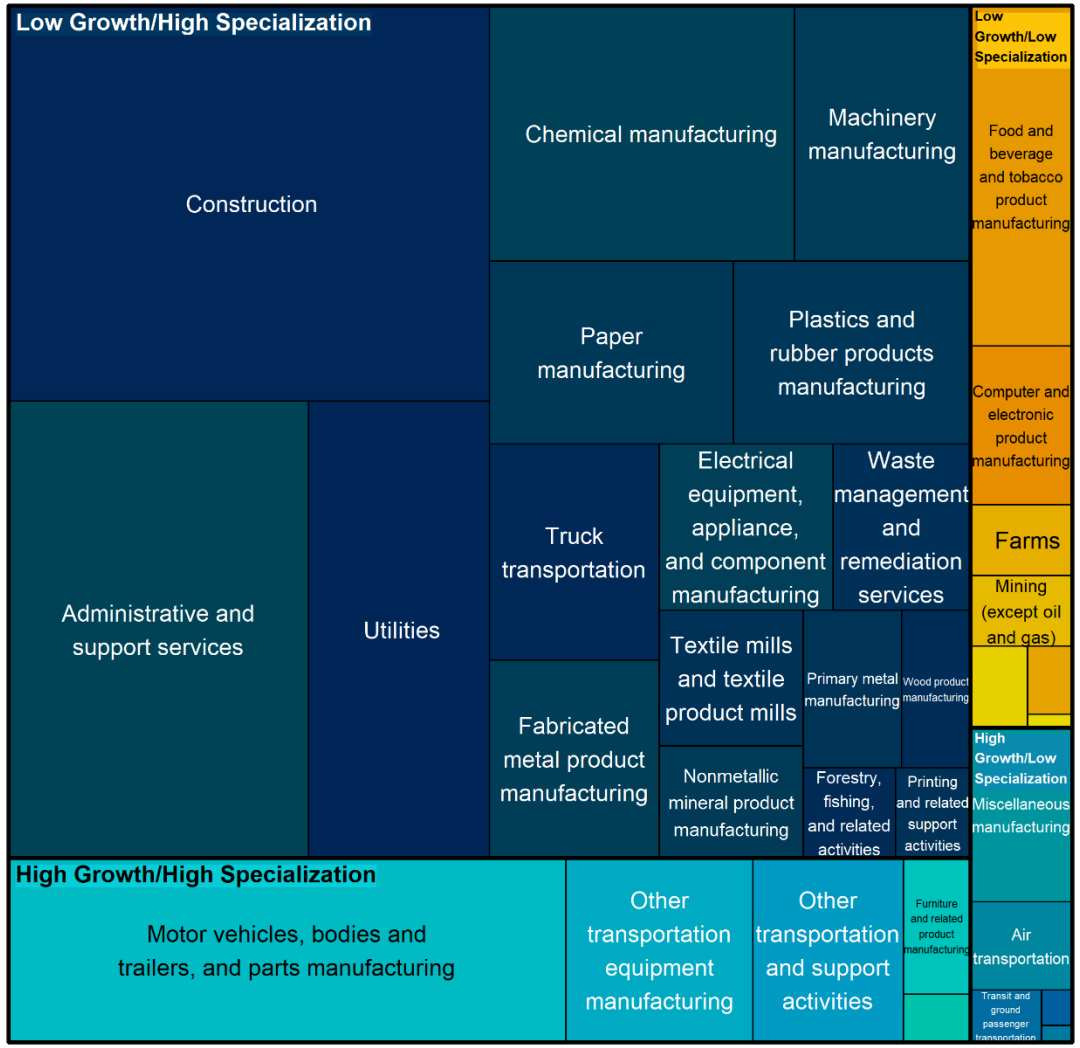


Chart: RMI • **Source:** EIA SEDS

South Carolina’s clean energy economy

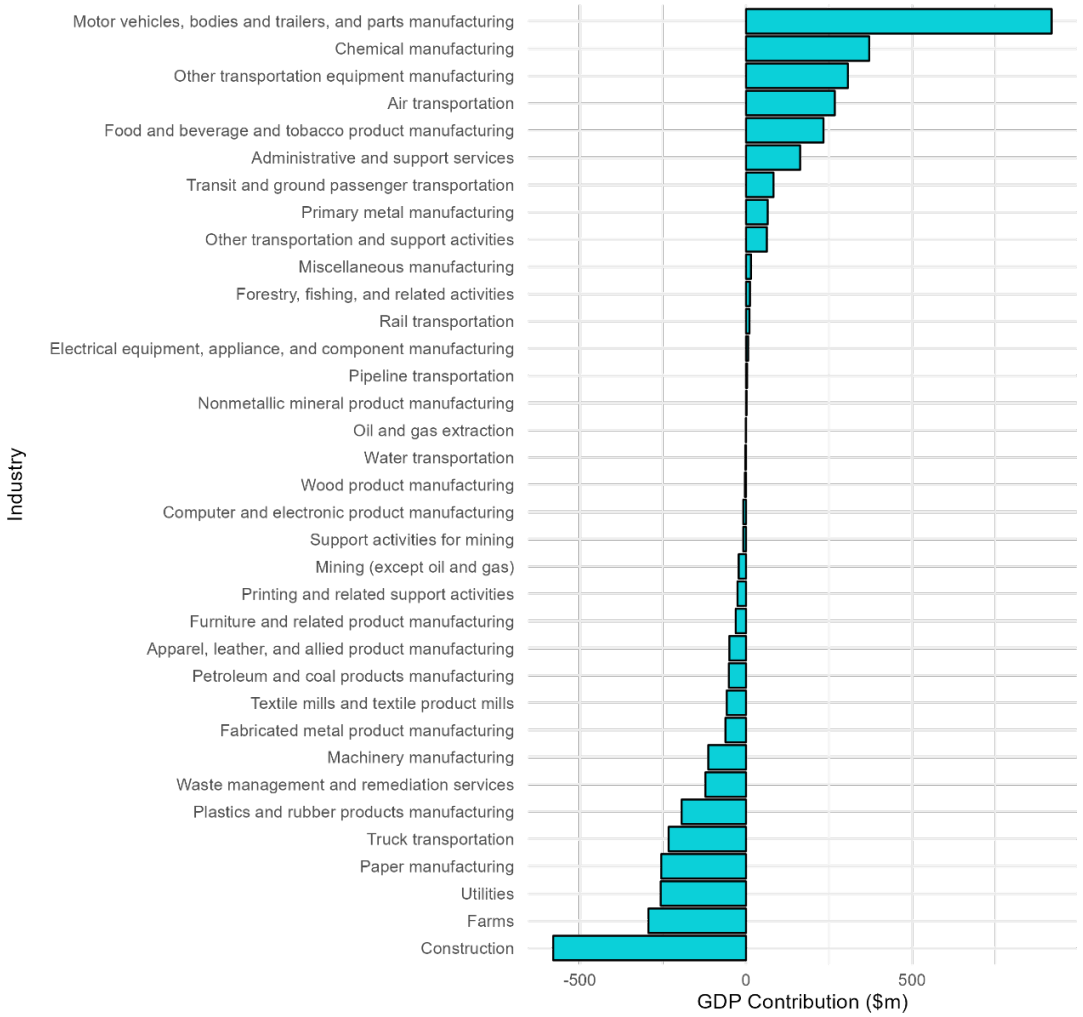
The largest segments of SC’s energy economy are in construction, utilities, and a range of manufacturing sectors. Its fastest growing sector in recent years has been motor vehicle manufacturing, while utilities and construction have shrunk.

South Carolina's Clean Energy Economy by Industry Growth and Specialization



2021-2022 GDP Contribution from South Carolina

Change in GDP by industry 2021-2022



South Carolina’s clean energy employment

South Carolina’s largest clean employers are in electric power generation and energy efficiency.

South Carolina's energy employment by technology

The state's largest overall energy employer is vehicles, while electric power generation and energy efficiency are tied for most clean jobs at around 20,000 each.

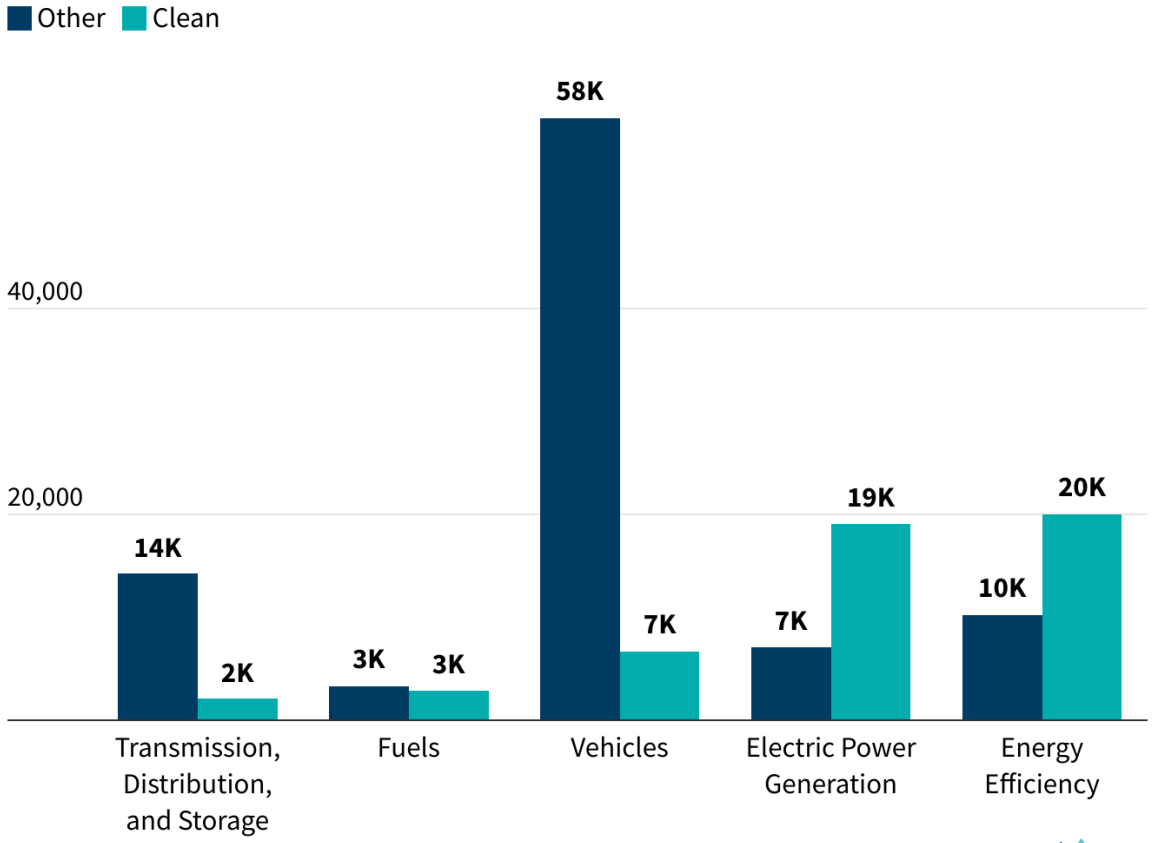


Chart: RMI • **Source:** 2024 U.S. Energy & Employment Jobs Report (USEER)

South Carolina's Energy Employment by Industry

Total jobs in energy industries across South Carolina

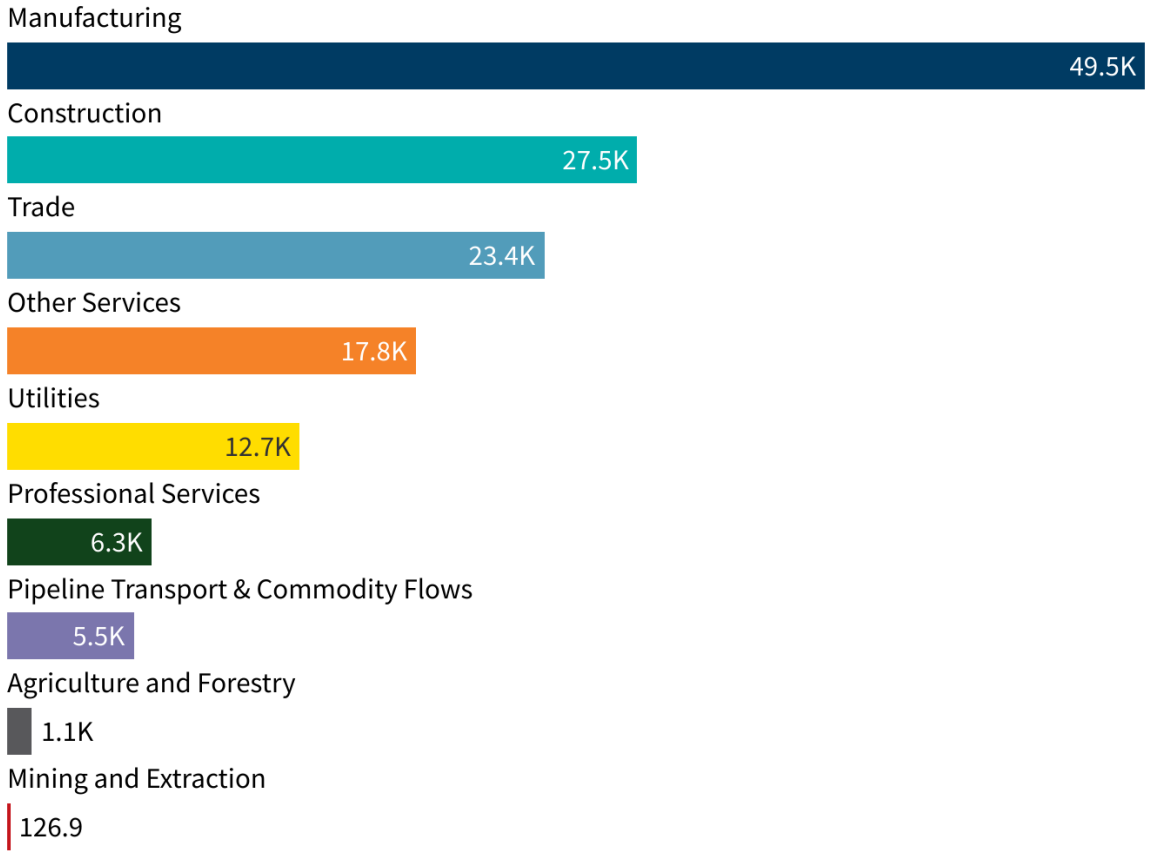


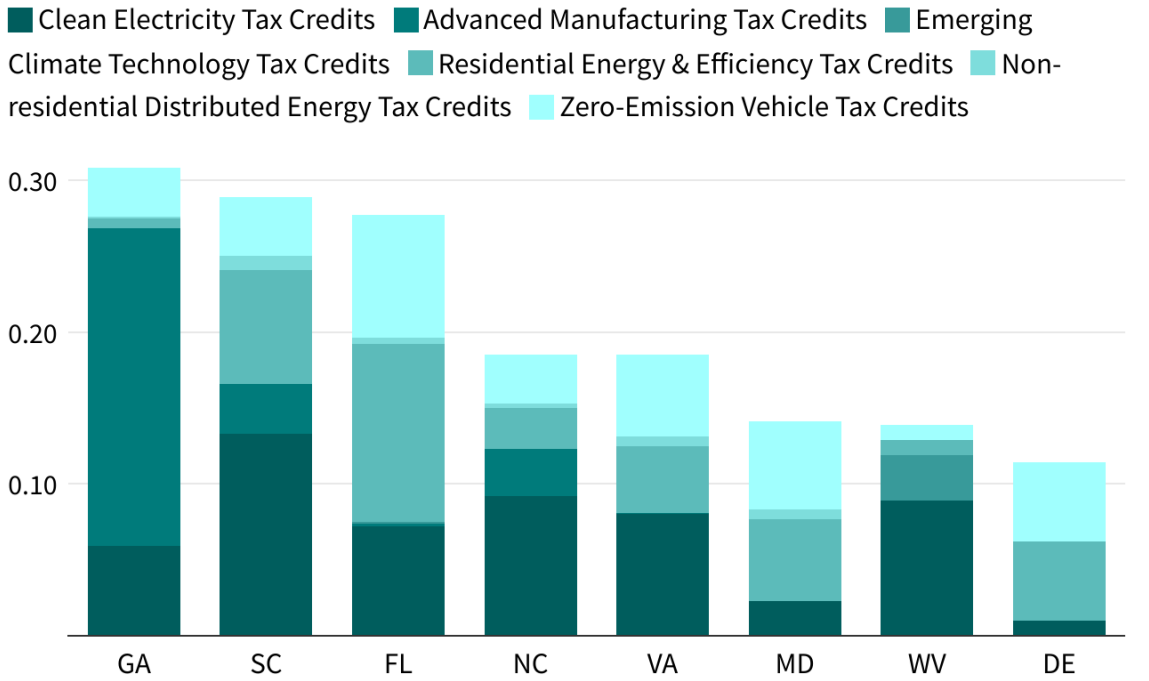
Chart: RMI • **Source:** 2024 U.S. Energy & Employment Jobs Report (USEER)

South Carolina has already received nearly $1 billion in federal clean energy investments

In a climate-aligned scenario, this could increase to $10-14 billion total by 2031 as clean electricity, manufacturing and vehicle tax credits stimulate growth in the state.

South Carolina has received some of the most clean energy public investments in the region

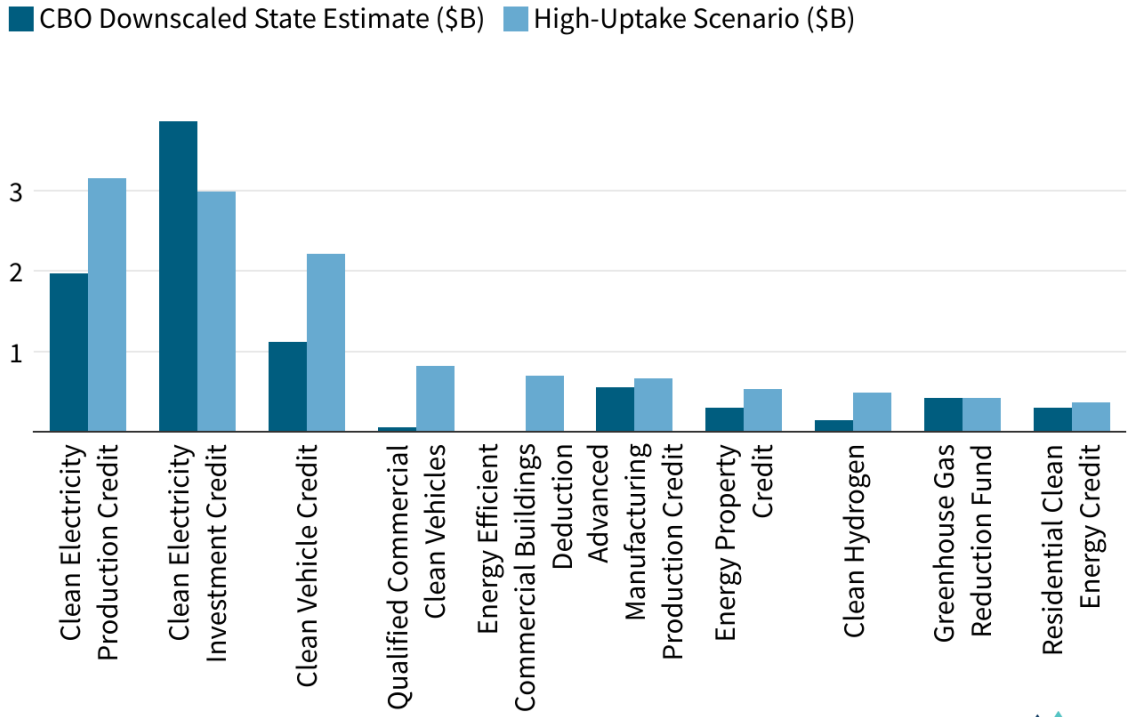
The largest contributors are clean electricity and residential efficiency tax credits (estimated investments since 2022 as a share of GDP)



Source: Clean Investment Monitor; Author Estimates

The state also has the potential to attract billions more in federal financing

Estimates of total federal funding to South Carolina by 2031 in a business-as-usual (CBO) scenario, and one in which the US meets its climate goals (High Uptake)



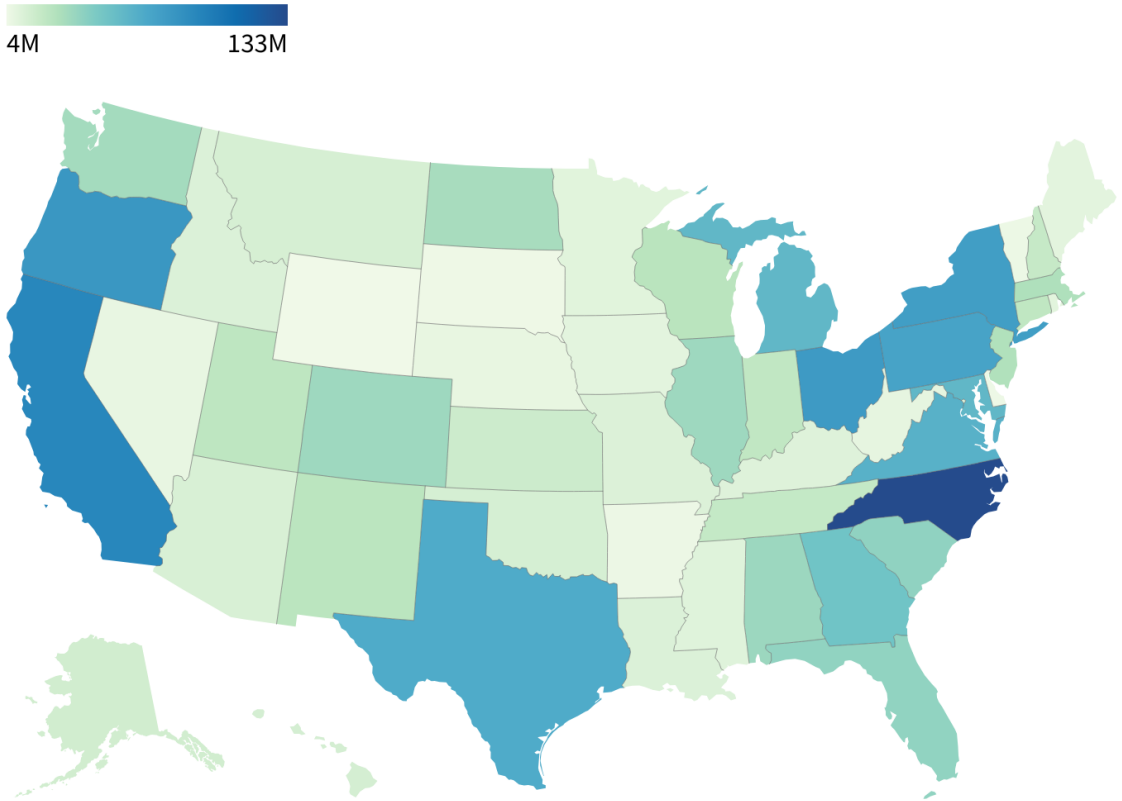
Source: Clean Investment Monitor; Author Estimates

A significant player in cleantech innovation

As entrepreneurs search for the next wave of clean energy technologies, South Carolina's relative strength in attracting federal R&D dollars and inventing new patents positions it well to capitalize.

Public Funding for Low Carbon Research and Development

South Carolina received nearly $40million in Federal RD&D grants from 2016-2021



Map: RMI • **Source:** ITIF

South Carolina is a regional power in manufacturing, transport, and wind patents

Number of clean energy patents, by sector, 2016-2021

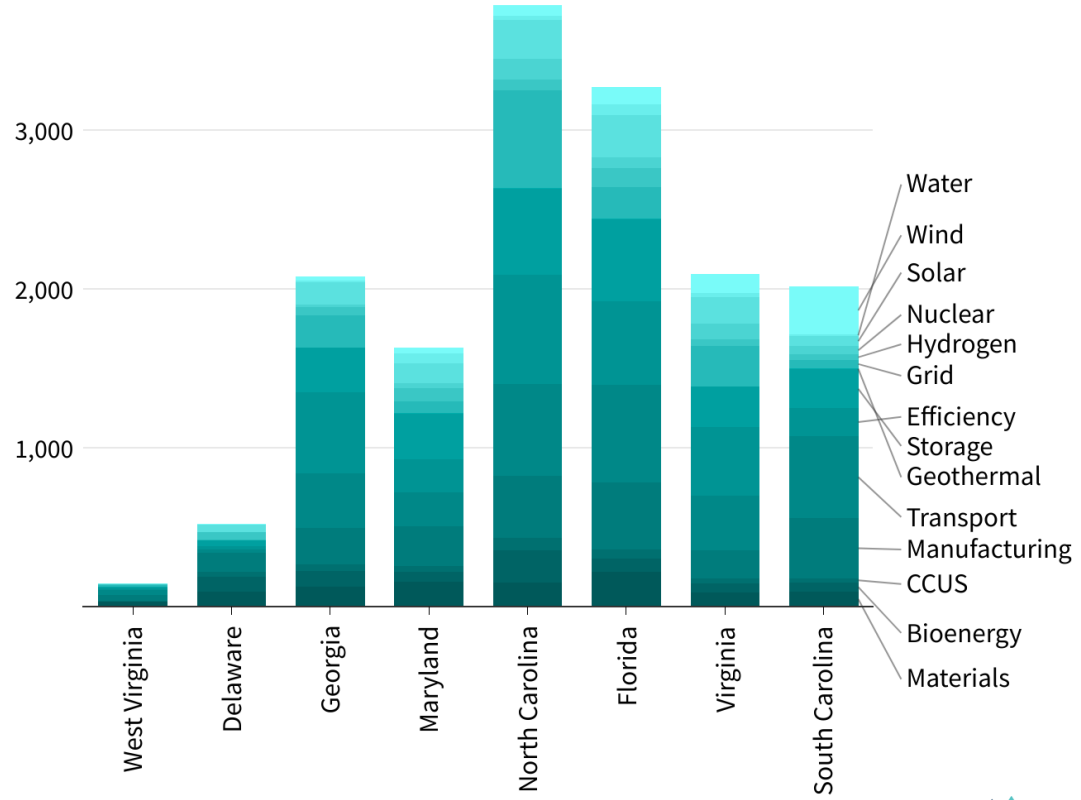


Chart: RMI • **Source:** ITIF

South Carolina is adding renewable electricity at a quick pace

As legislators have removed regulatory barriers to clean energy, the state has seen something of a boom in renewable electricity, especially solar, although this has been slower than in states like Virginia and Florida.

South Carolina has quadrupled its renewable electricity capacity since 2018

Growth in cumulative renewable electricity capacity relative to 2018, index 2018=100

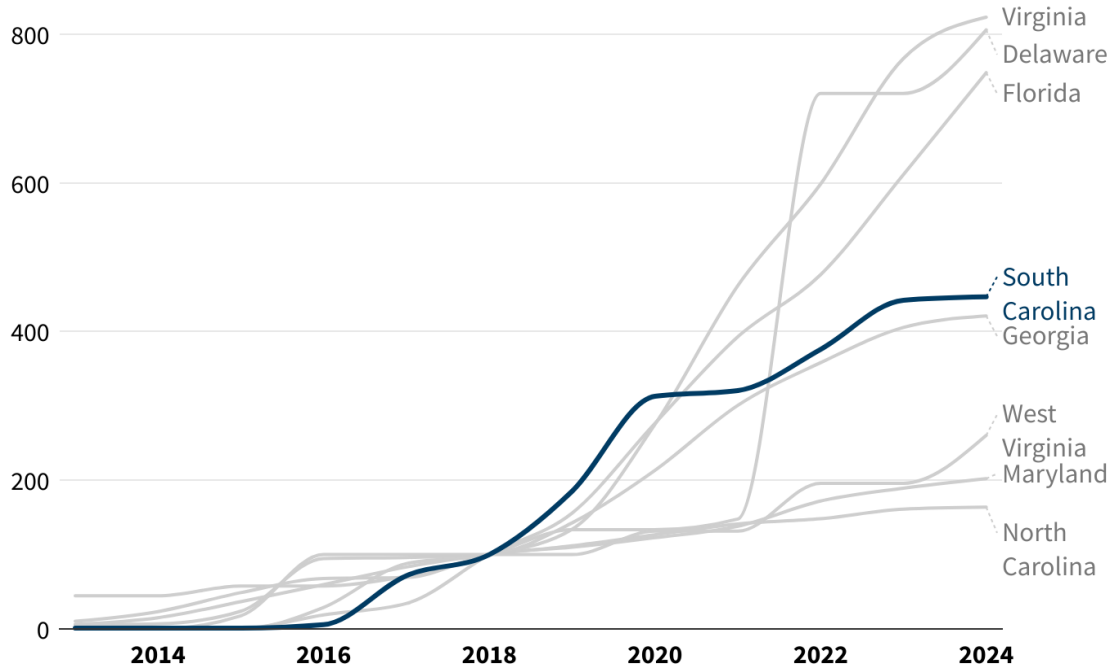


Chart: RMI • **Source:** EIA

Over 70% of planned electricity additions in SC are solar

Over 1GW of solar projects have received regulatory approvals but are yet to go into construction,

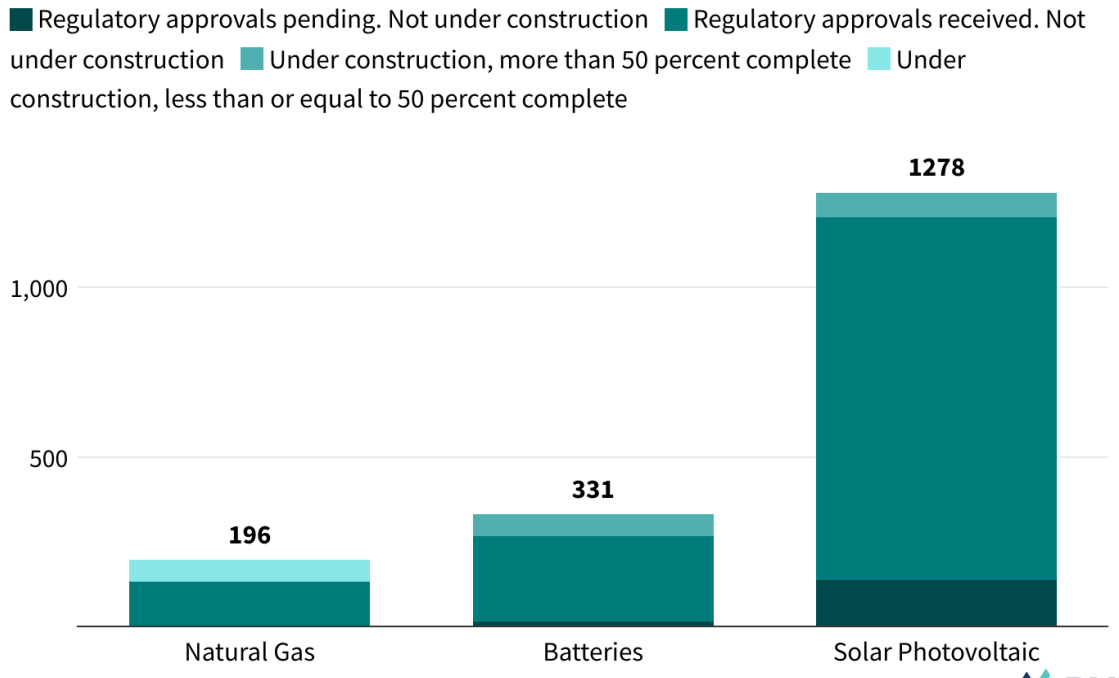


Chart: RMI • **Source:** EIA

RMI

Industrial energy use drives state economy, and electricity is among cheapest in the region

The price of energy for industrial users is a key competitiveness driver for the state, putting pressure on regulators and developers to maintain the pace of deployment even as the grid gets cleaner and more reliable.

South Carolina spends the most of its economic output on energy of any state in the region

Energy expenditures as a share of GDP, by state

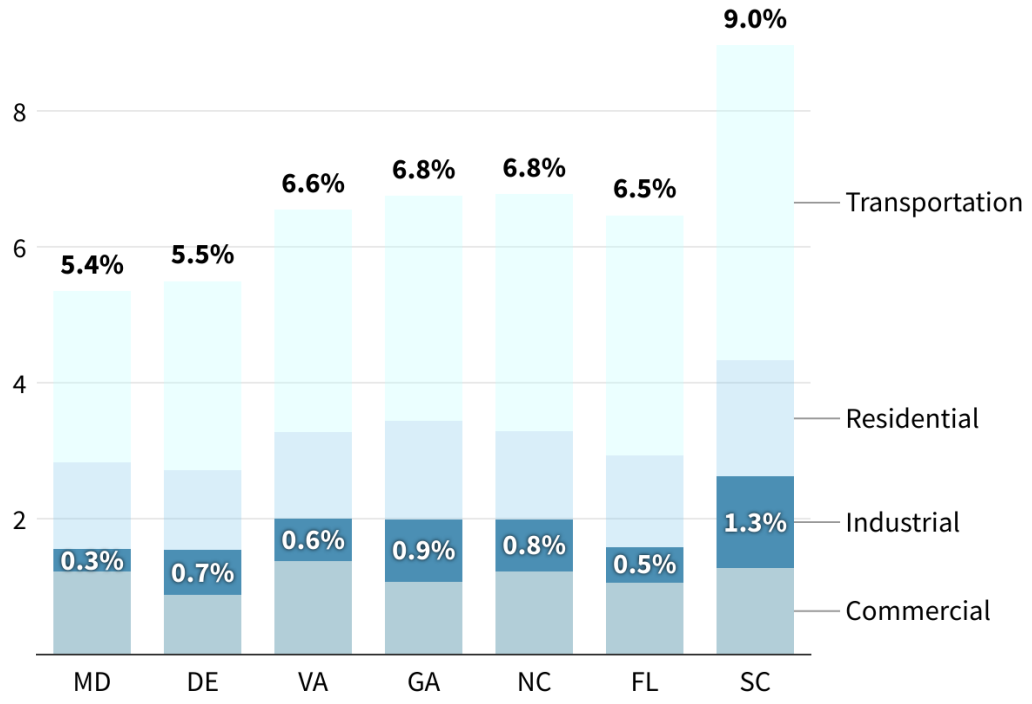


Chart: RMI • **Source:** EIA

South Carolina has consistently had among the lowest industrial electricity prices in the region

Industrial electricity prices, cents/kwh

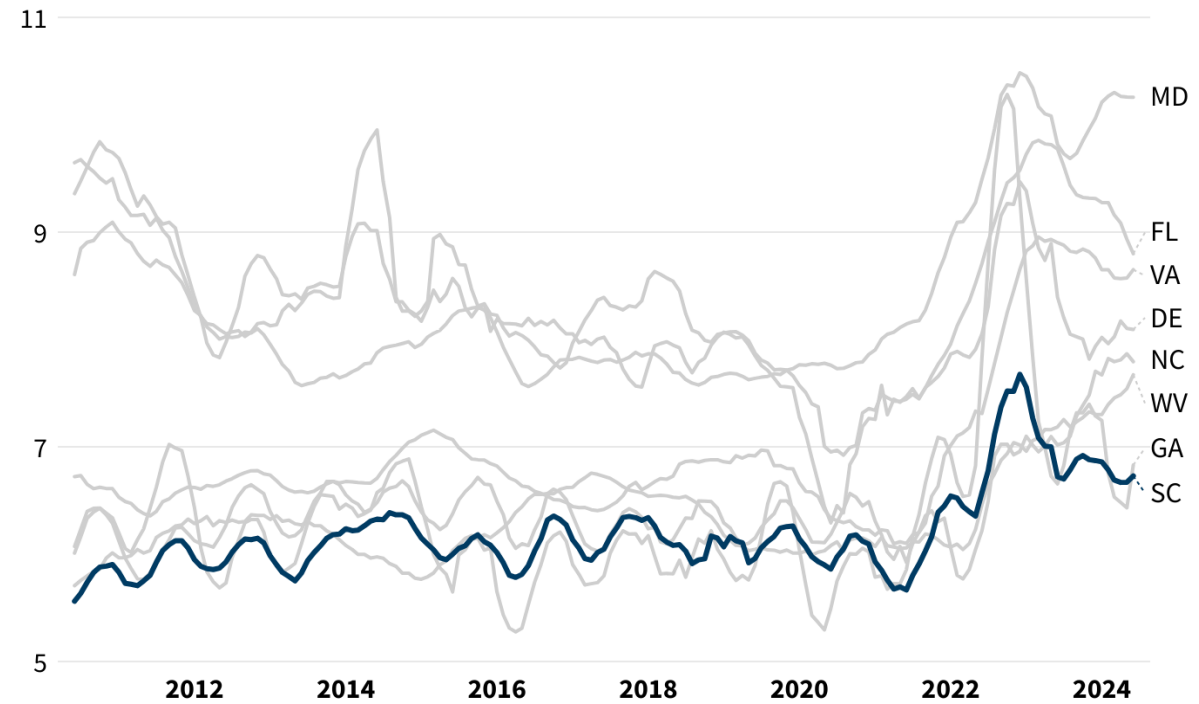


Chart: RMI • **Source:** EIA 861m

This is just the beginning…

RMI's Energy Policy Simulator forecasts continued strong growth in renewable electricity, however this pace varies significantly by scenario.

In an IRA-only Scenario, Solar Generation Surpasses Natural Gas Around 2030, but Never Catches Nuclear

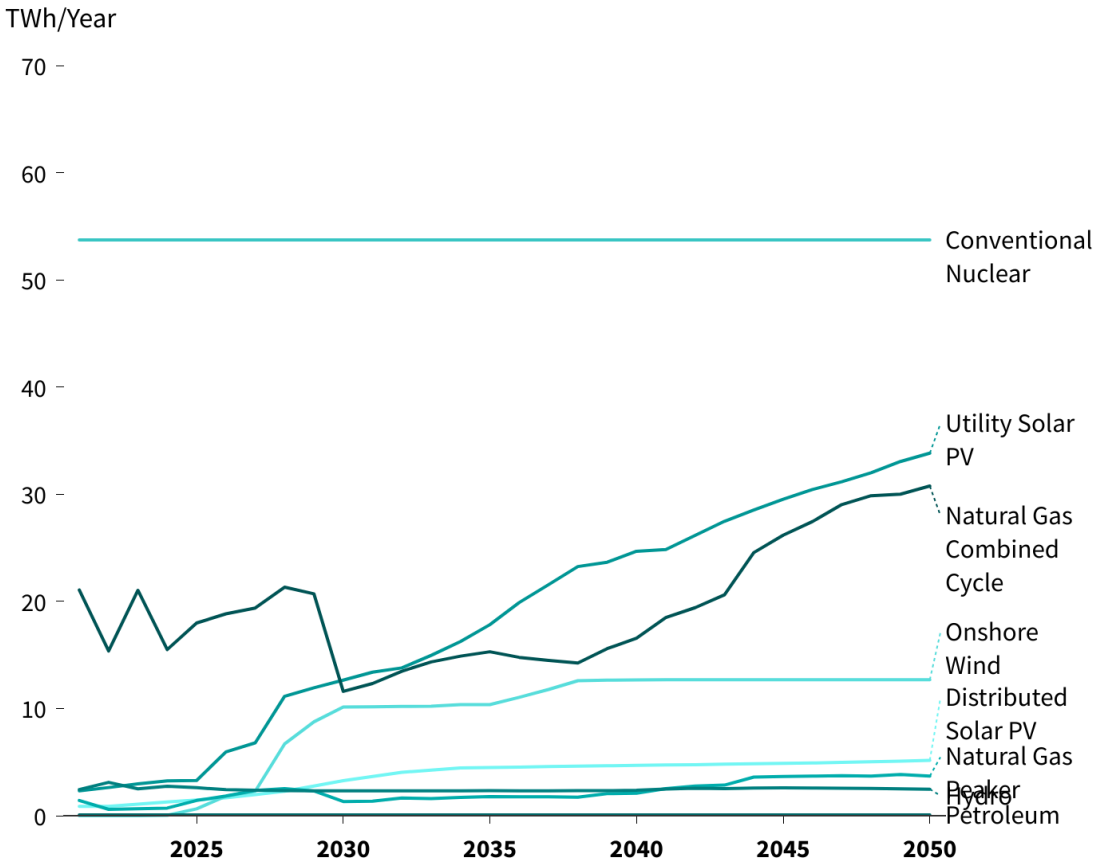


Chart: RMI • **Source:** Energy Policy Simulator

In a Climate-Aligned Scenario, Solar & Wind Generation Surpass Natural Gas around 2032 and Nuclear by 2045

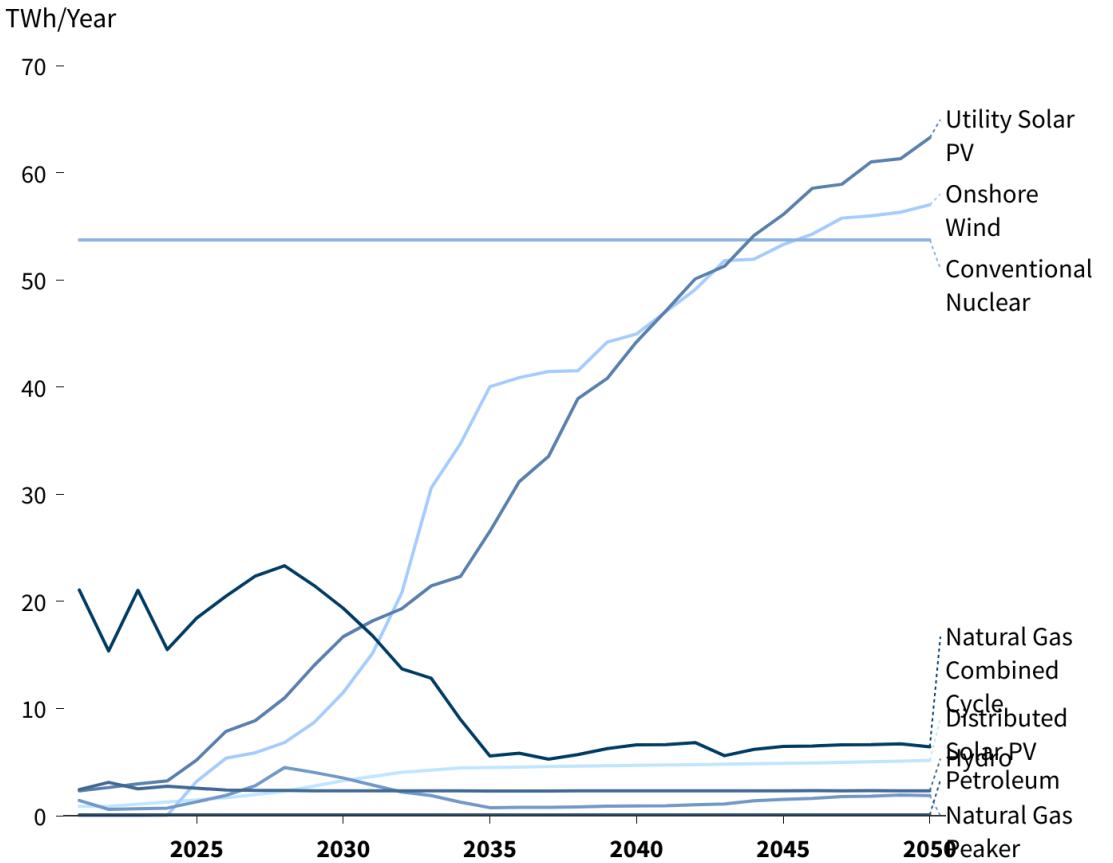


Chart: RMI • **Source:** Energy Policy Simulator

South Carolina's Clean Electricity Opportunity

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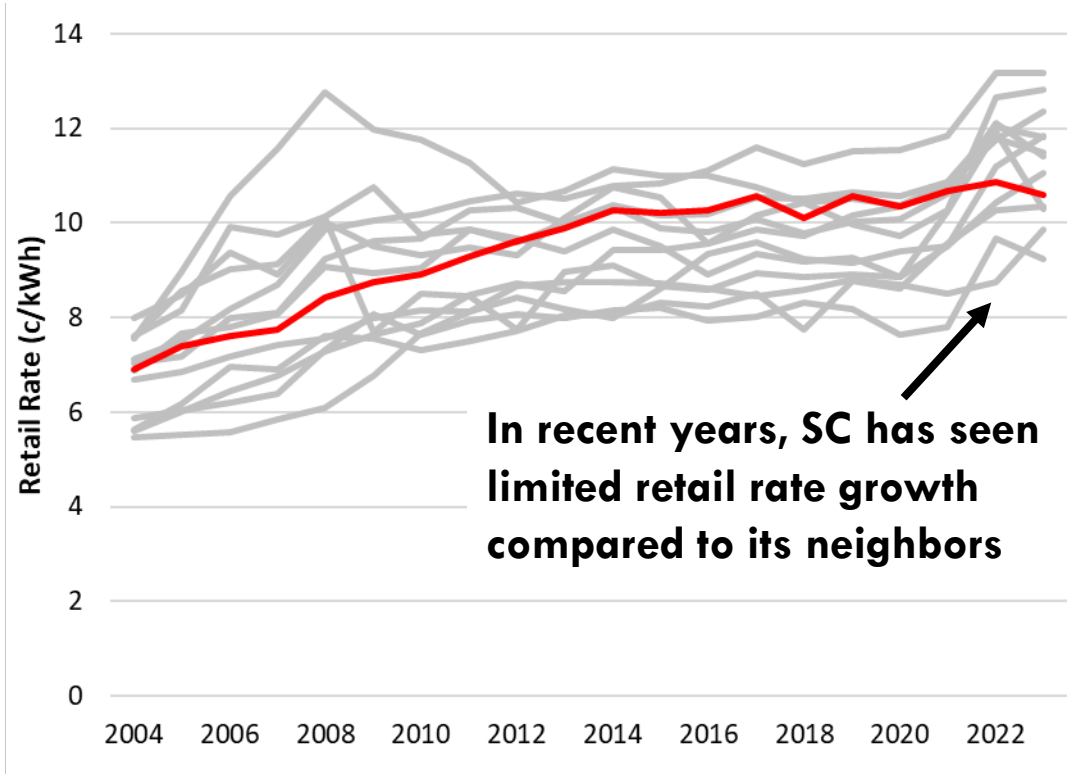
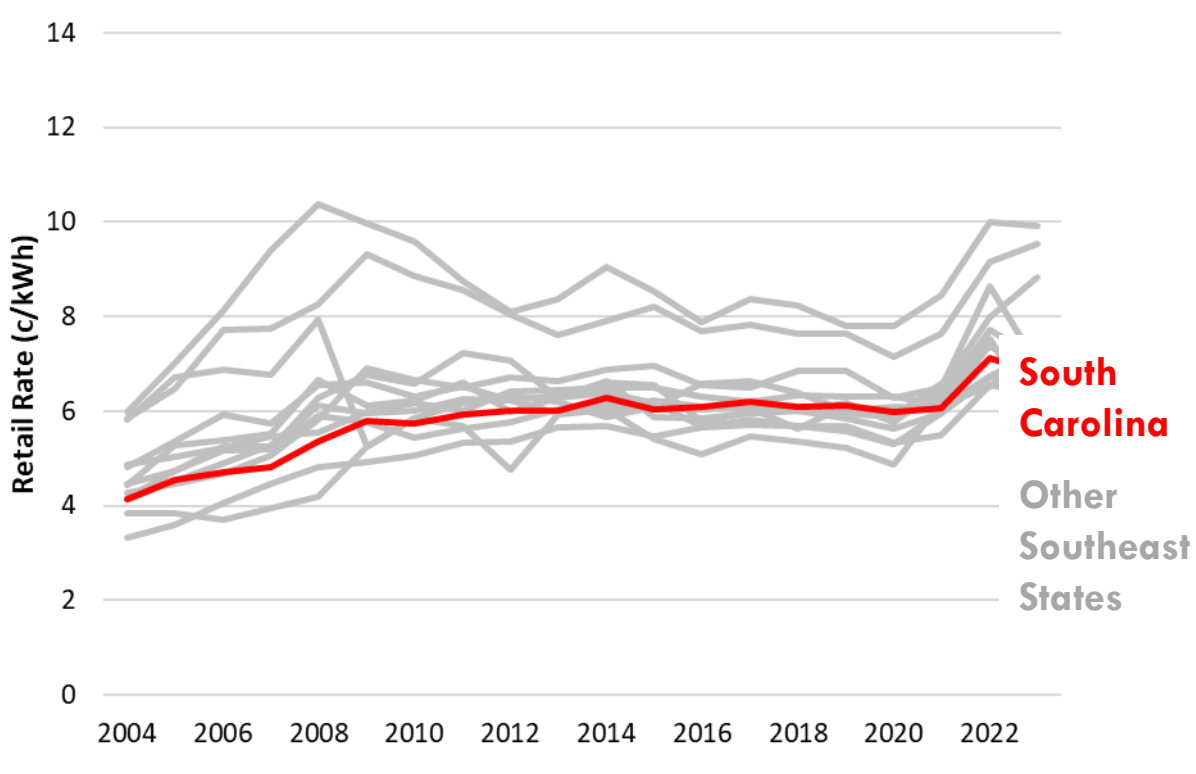
South Carolina offers relatively affordable power, especially as neighboring states' C&I rates rise

Commercial Customer Retail Rate



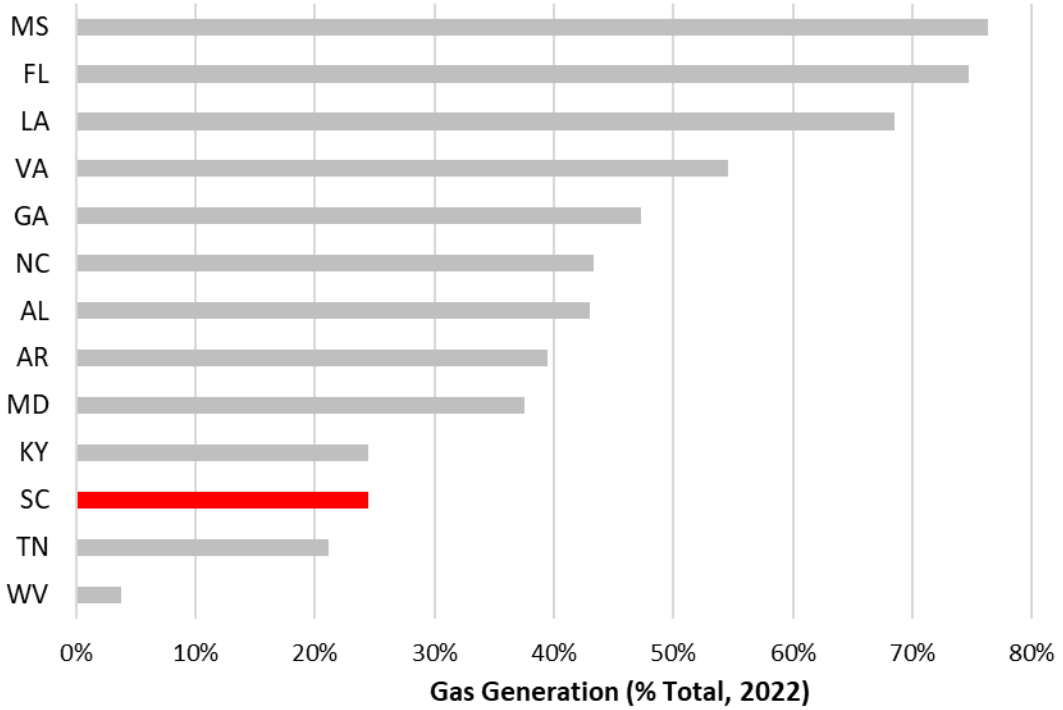
Industrial Customer Retail Rate



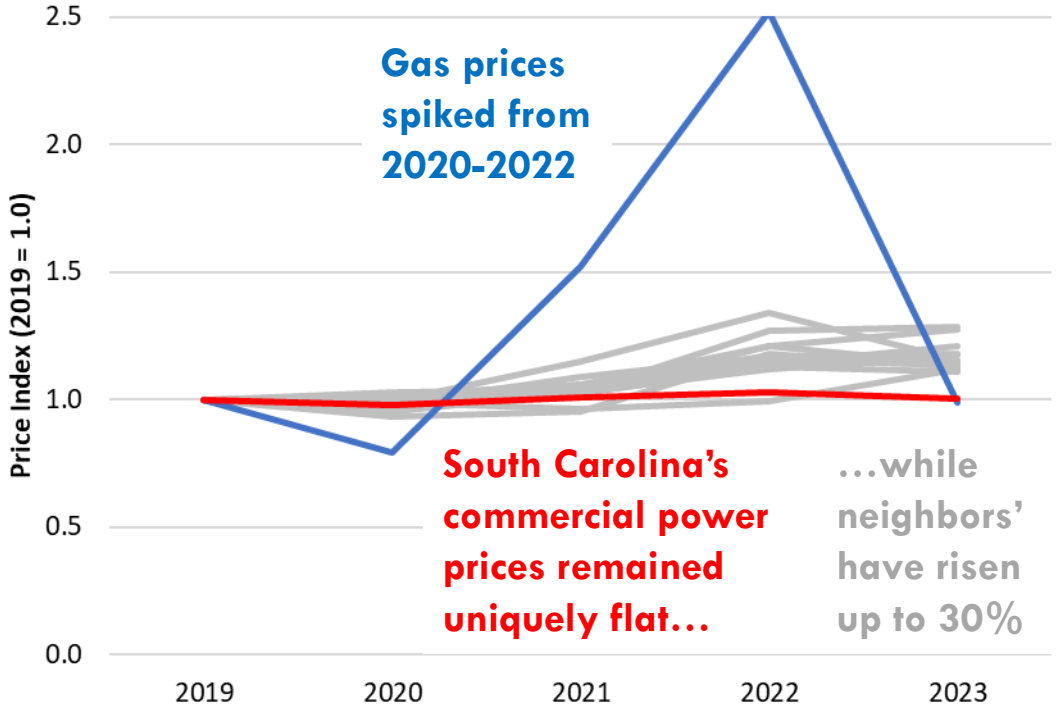
Source: EIA Average Retail Price of Electricity, Annual.

Limited exposure to gas may be helping South Carolina keep power rates low

Reliance on Gas for Power Generation



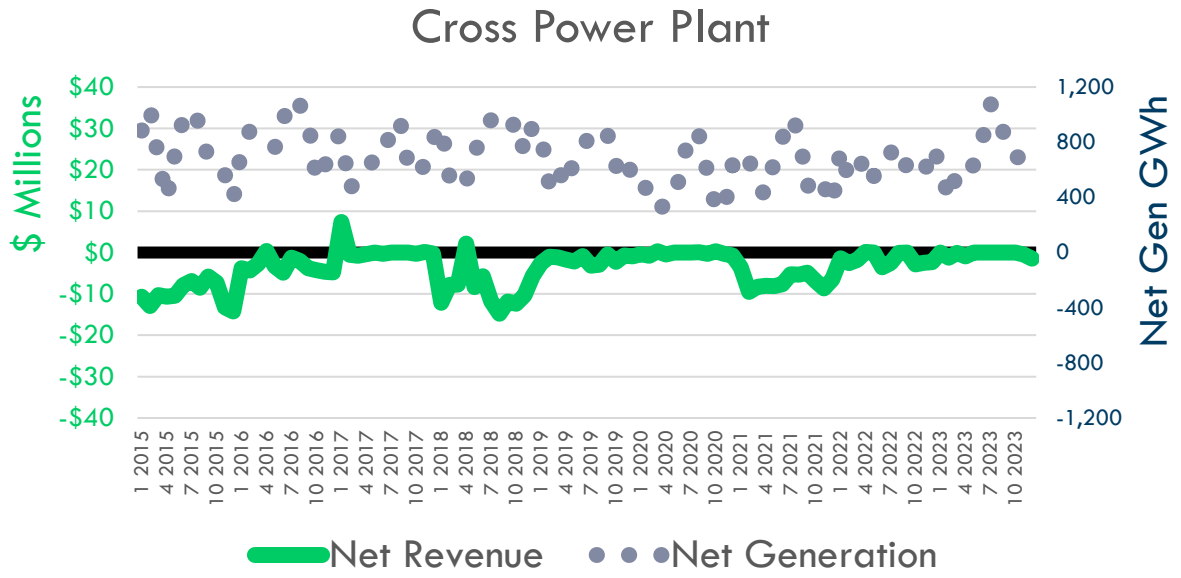
Gas and Power Price Growth (2019-2023)



Source: EIA State Electricity Profiles, Table 5. EIA Average Retail Price of Electricity, Annual. EIA Natural Gas (Henry Hub Natural Gas Spot Price).

However, electricity bills are negatively impacted by uneconomic coal operation

- SC utilities frequently operate coal resources at times when lower cost alternative resources (solar and battery storage) can be drawn upon to provide equivalent reliability and meet demand.
- This has led to $406M in net revenue losses for South Carolina's coal fleet, a cost borne by customers.

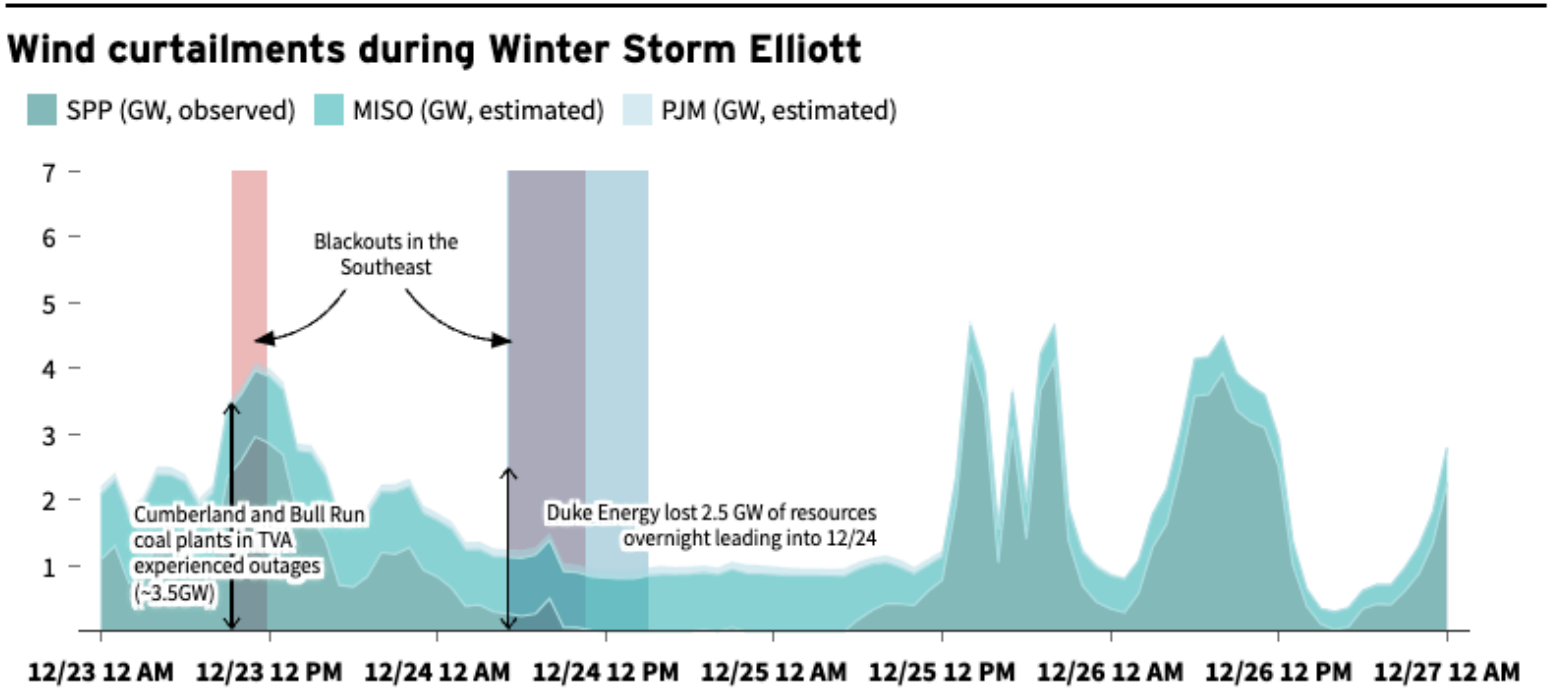


The Impact of uneconomic dispatch of coal 2015–2023 in South Carolina	
Gross losses	$961M
Annual household bill impact ($) per year*	$144
Avoidable CO_2 emissions	86M tons

** For customers of Santee Cooper*

During 2022's Winter Storm Elliot ~94,893 SC customers were affected by rolling blackouts

- Meanwhile, wind resources across the Eastern Interconnect that could have helped keep the lights on were curtailed (figure on right)*
- ACORE study found that 1 GW of additional transmission expansion between PJM and Duke's utility area could have provided customers with electricity valued at over $80M†



All times are in Central Standard Time. SPP reports the amount of wind curtailed in its footprint, while MISO and PJM do not explicitly do so. To estimate the amount of wind curtailed in MISO and PJM, the 2021 annual average curtailment rate from LBNL's "Land-Based Wind Market Report: 2022 Edition" was applied to the reported hourly wind generation profile in the two regions. TVA's periods of rolling blackouts are in red, while Duke Energy's outage period is in blue (purple indicates overlap).

Sources: PJM Generation, MISO Historical Generation Mix, SPP Historical Generation Mix, SPP Variable Energy Resource Curtailments, NC Policy Watch, AP News

* "Wasted Wind and Tenable Transmission during Winter Storm Elliott," RMI, 2023

† The Value of Transmission during Winter Storm Elliot, American Council on Renewable Energy, 2023

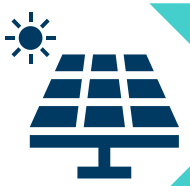
Investment approach to increase state's attractiveness via a cleaner power sector

Make it easier for companies to meet their goals

Make it easy for large, energy-intensive businesses to ensure their electricity demand is met with increasingly clean(er) electricity.

Incentivize cost reduction

Expose utilities, not only customers, to the cost of continued fossil fuel operations



Make the future grid cleaner

Grease the wheels for the rapid, scaled deployment of solar and grid-connected battery storage that utilities are planning for

Cost-effectively plan for reliability

Explore transmission and distribution infrastructure solutions that increase regional interconnection and enable greater interconnection of solar + storage

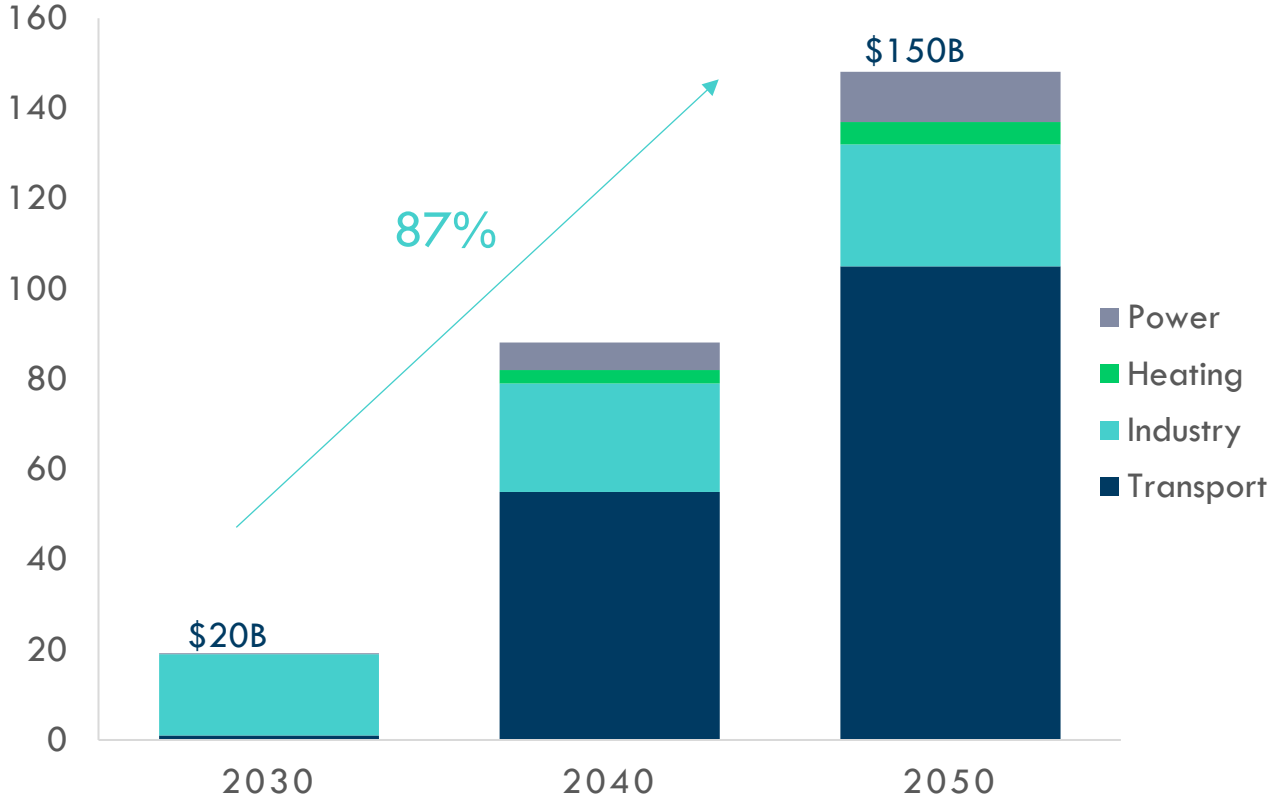
South Carolina's Green Hydrogen Opportunity

RMI – Energy. Transformed.

Hydrogen's versatility in decarbonizing multiple sectors unlocks a US economic market potential of $150B and upward of 3.4 million jobs by 2050

H2 Total Addressable Market (TAM)

$ Billions



Federal funding supporting industrial decarbonization

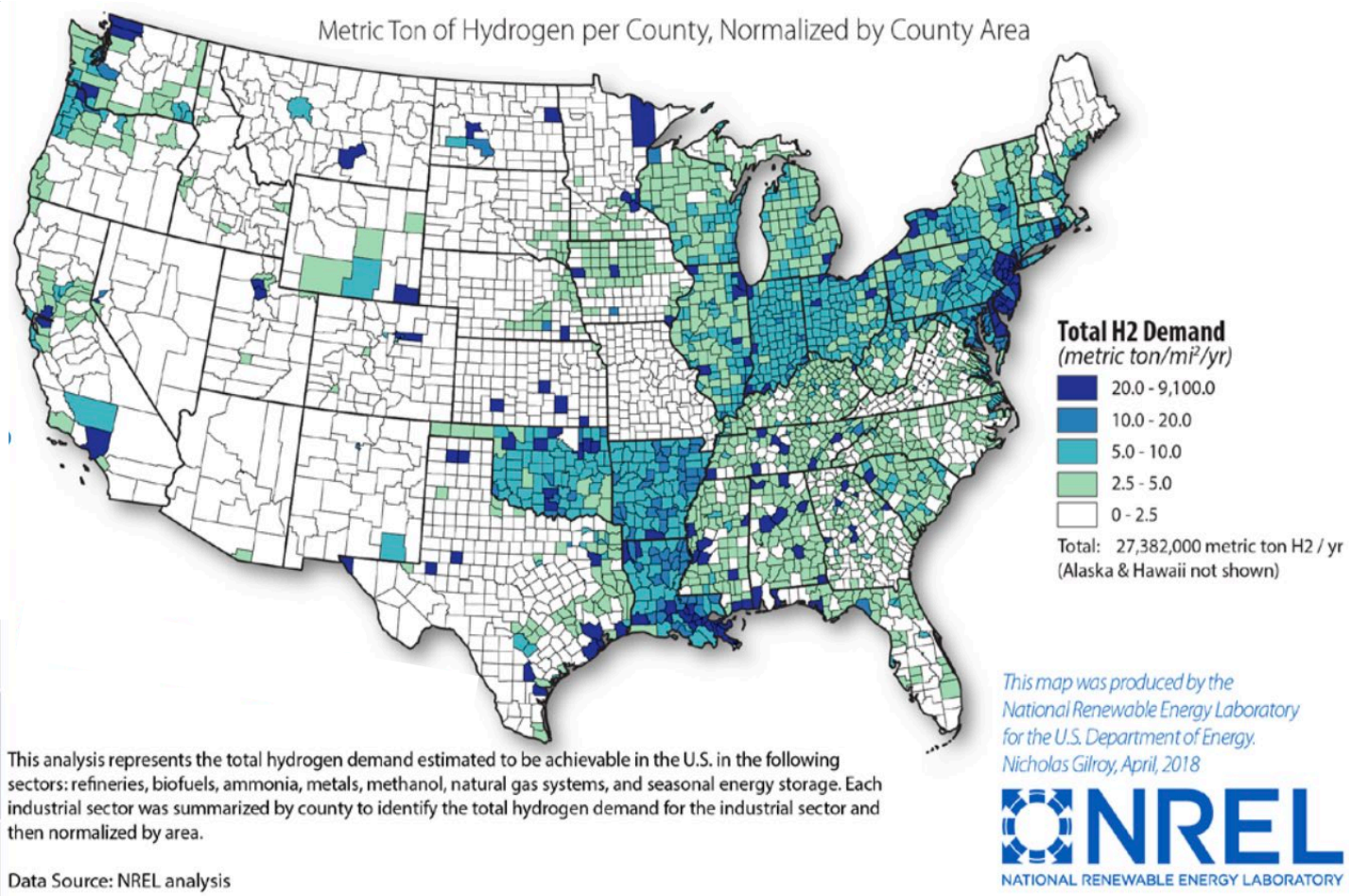
$316 billion
financing and grants

$32 billion
financing and grants

$339 billion
financing and grants

Source: Pathways to Commercial Liftoff: Clean Hydrogen Report, Road Map to a US Hydrogen Economy

Current demand in SC may be low, but there are economic growth, job creation opportunities



This analysis represents the total hydrogen demand estimated to be achievable in the U.S. in the following sectors: refineries, biofuels, ammonia, metals, methanol, natural gas systems, and seasonal energy storage. Each industrial sector was summarized by county to identify the total hydrogen demand for the industrial sector and then normalized by area.

Data Source: NREL analysis

Socioeconomic benefits

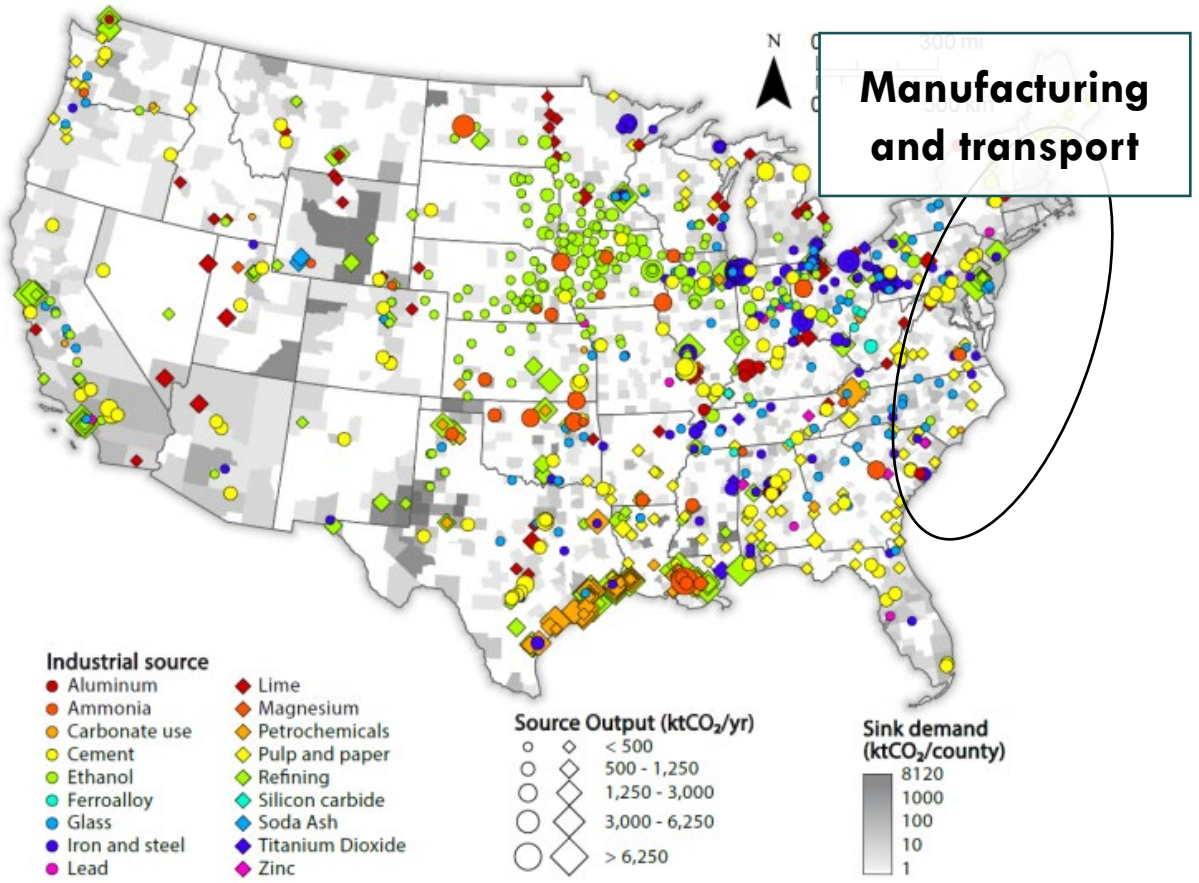
1. Clean hydrogen is a ready solution to decarbonize **heavy industry** and **transport.**
2. These assets are often located in regions and communities **historically underinvested in.**
3. Investment will bring regional **supply chain** development, **job** creation, **innovation**, and **health benefits.**

To unlock these benefits, hydrogen market growth must be supported.

Clean hydrogen offers a promising path

to decarbonize South Carolina's traditional heavy hydrocarbon manufacturing and transport industries

Industrial plants across the United States



Hydrogen opportunities

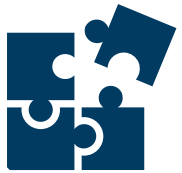
1. Clean hydrogen is a ready solution to decarbonize **high heat manufacturing.**

2. Hydrogen can be stored and used to **balance energy supply and demand,** reducing peak load and improving grid stability.

3. Clean hydrogen can **power heavy-duty vehicles** offering a zero-emission solution for long-haul transportation.

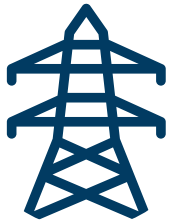
Source: US National Clean Hydrogen Strategy and Roadmap

Understanding how hydrogen fits into South Carolina's energy and economic growth is key to maximizing economic benefits and minimizing constraints



Contextualizing local hydrogen potential against a broader clean energy ecosystem will ensure public and private sectors prioritize the strongest opportunities for economic development.

Creation of an enabling environment for manufacturing and industrial demand alongside development of skilled labor will ensure SC has building blocks for success.



Establishment of supportive and streamlined frameworks for clean energy's physical and digital infrastructure are essential to accelerate the transition.

South Carolina's Competitiveness Profile

RMI – Energy. Transformed.

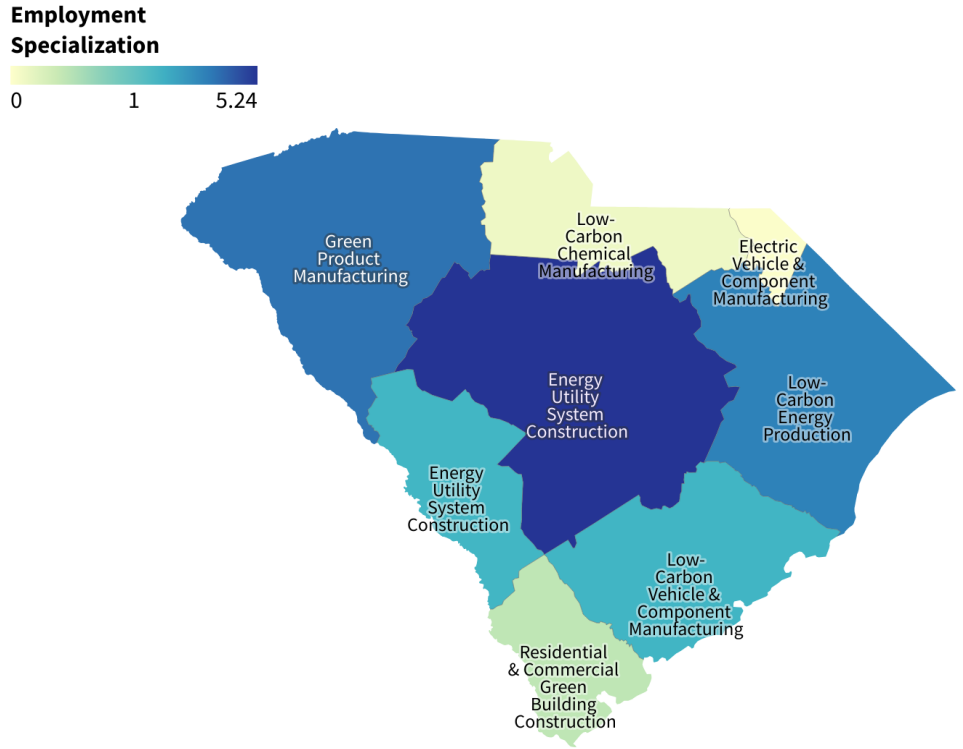
South Carolina's regions already specialize in industries relevant to key facets of the transition

The state's existing strengths in various manufacturing industries, transmission construction, and heavy industry position it well to capitalize on emerging opportunities.

Energy transition industry employment in South Carolina

Transition Subsector Category	Employment	Average Pay	Specialization
Low-Carbon Energy Production	2,060	$129,218	3.2
Low-Carbon Energy Machinery & Equipment Manufacturing	2,342	$80,574	2.8
Energy Utility System Construction	5,368	$85,264	2.0
Green Product Manufacturing	11,384	$59,909	1.3
Residential & Commercial Green Building Construction	54,953	$70,105	1.2
Green Hydrogen & Sustainable Fuels	1,016	$88,068	1.2
Low-Carbon Chemical Manufacturing	3,371	$89,223	1.0
Electric Vehicle & Component Manufacturing	8,406	$65,501	0.9

South Carolina already specializes in industries well positioned to transition into clean energy



Map: RMI Graphic • **Source:** Census Bureau

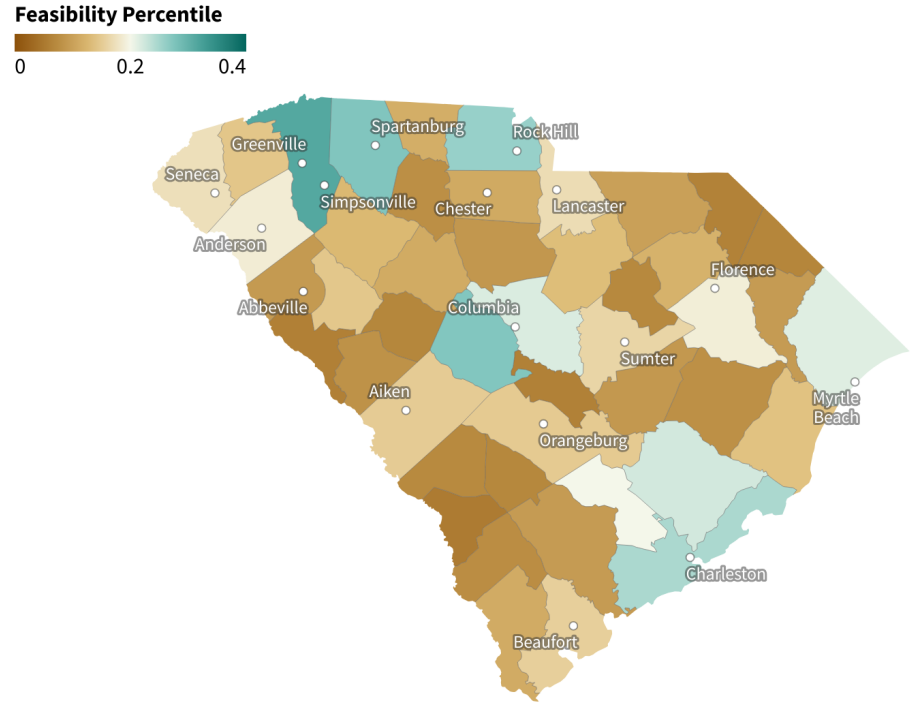
RMI

This positions parts of the state to compete in different clean tech industries

The Greenville-Spartanburg area performs well in our feasibility scores for both battery manufacturing and green hydrogen.

SC Feasibility: Battery & Component Manufacturing

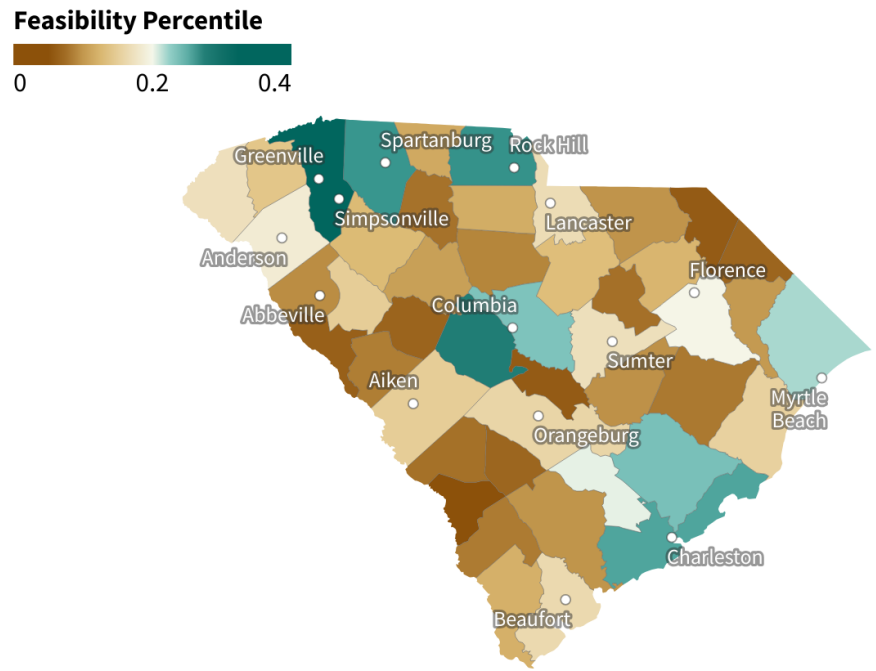
County-level feasibility of transitioning into Battery & Component Manufacutring based on existing related industry presence



Map: RMI • **Source:** Clean Growth Tool

SC Feasibility: Green Hydrogen

County-level feasibility of transitioning into Green Hydrogen, relative to all US counties, based on existing related industry presence



Map: RMI • **Source:** Clean Growth Tool

Place-based prioritization of feasible industries

South Carolina should be strategically directing its scarce economic development resources to industries that best leverage its existing capabilities

Feasibility of Industry Transitions in South Carolina

Top-right quadrant shows energy transition industries where South Carolina has the highest feasibility of transitioning into more complex industries.

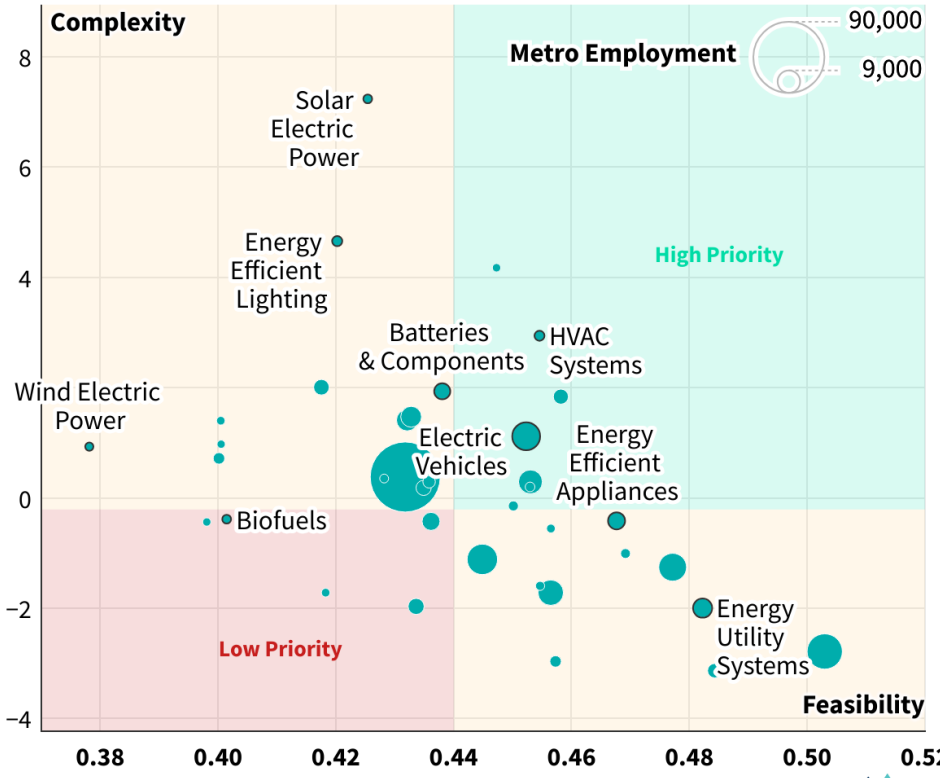


Chart: RMI Graphic • **Source:** Great Lakes Development Tool • Created with Datawrapper

Feasibility of clean energy industries across South Carolina Metros

	1	2	3	4	5
Augusta-Richmond County, GA-SC	Energy Utility Systems	Heat Pumps	Green Buildings	Low-Carbon Cement & Concrete	Low-Carbon Construction Machinery
Charleston-North Charleston, SC	Energy Utility Systems	Green Buildings	Low-Carbon Cement & Concrete	Low-Carbon Vehicles	Solar Electric Power
Charlotte-Concord-Gastonia, NC-SC	Heat Pumps	Low-Carbon Construction Machinery	Low-Carbon Industrial Equipment	Electric Vehicle Components	Green Plastics
Columbia, SC	Energy Utility Systems	Green Buildings	Heat Pumps	Low-Carbon Cement & Concrete	Green Hydrogen
Florence, SC	Energy Utility Systems	Green Buildings	Heat Pumps	Low-Carbon Cement & Concrete	Green Hydrogen
Greenville-Anderson, SC	Energy Utility Systems	Low-Carbon Construction Machinery	Electric Vehicle Components	Heat Pumps	Green Plastics

Transitions do not happen on their own; policy matters

South Carolina has not historically used its policy levers to effectively encourage the energy transition.

South Carolina has very few recommended climate policies in place

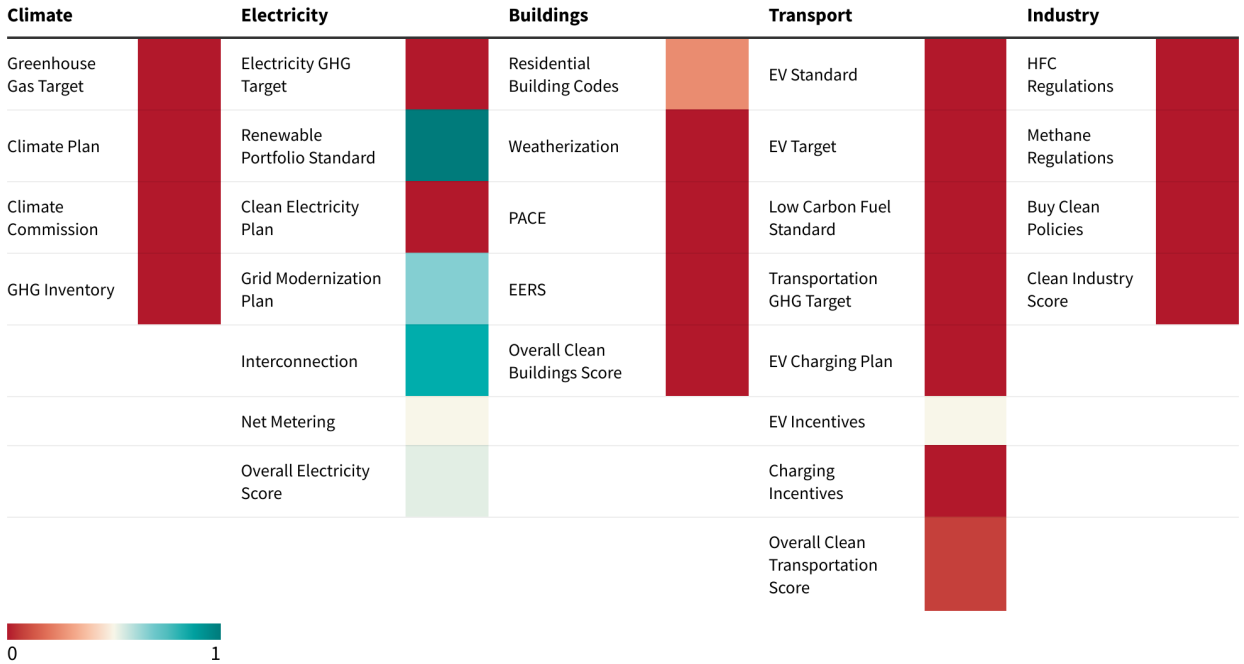


Table: RMI Graphic • **Source:** XChange Policy Tracker

South Carolina has the weakest climate policies in the region

Normalized index of Xchange climate policy data, by topic area. Each has a maximum score of 1.

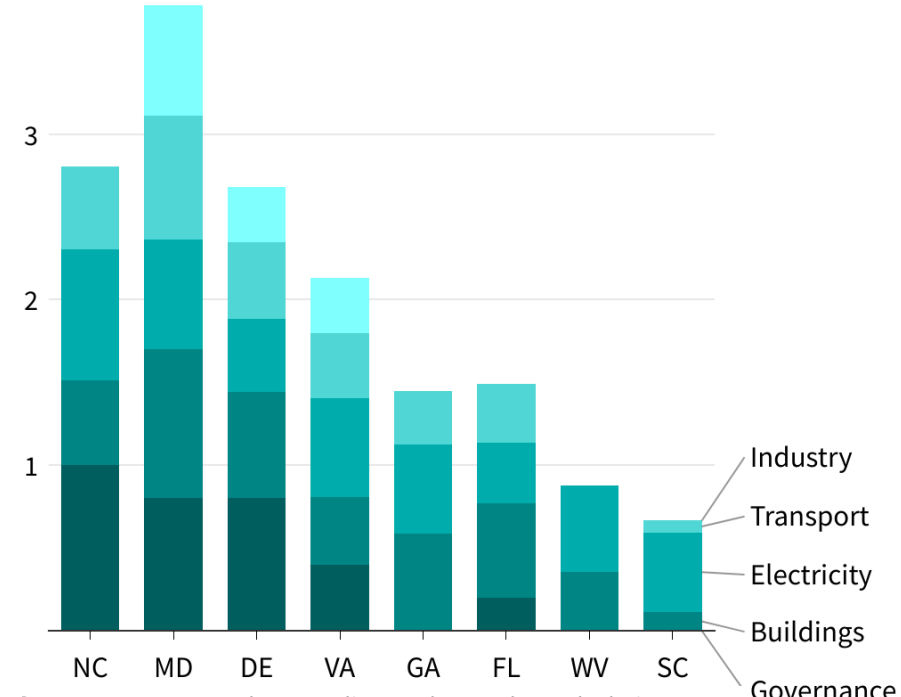


Chart: RMI • **Source:** Xchange Policy Tracker; Author Calculations

Clean energy economic development policy does not equal climate policy

Climate policy approaches to date have been too partisan in nature and have been a poor predictor of clean investment attraction.

Climate policy follows partisanship

Some of the states with the most ambitious climate policies have seen the least clean energy investment since 2018, and vice versa.

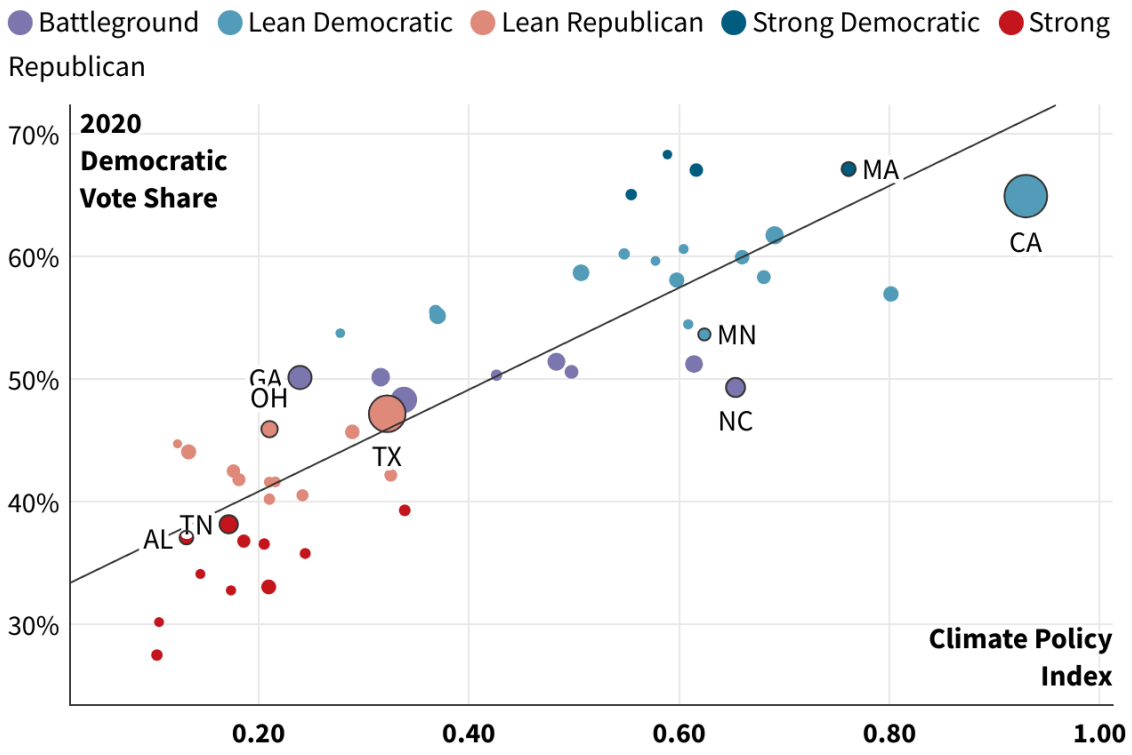
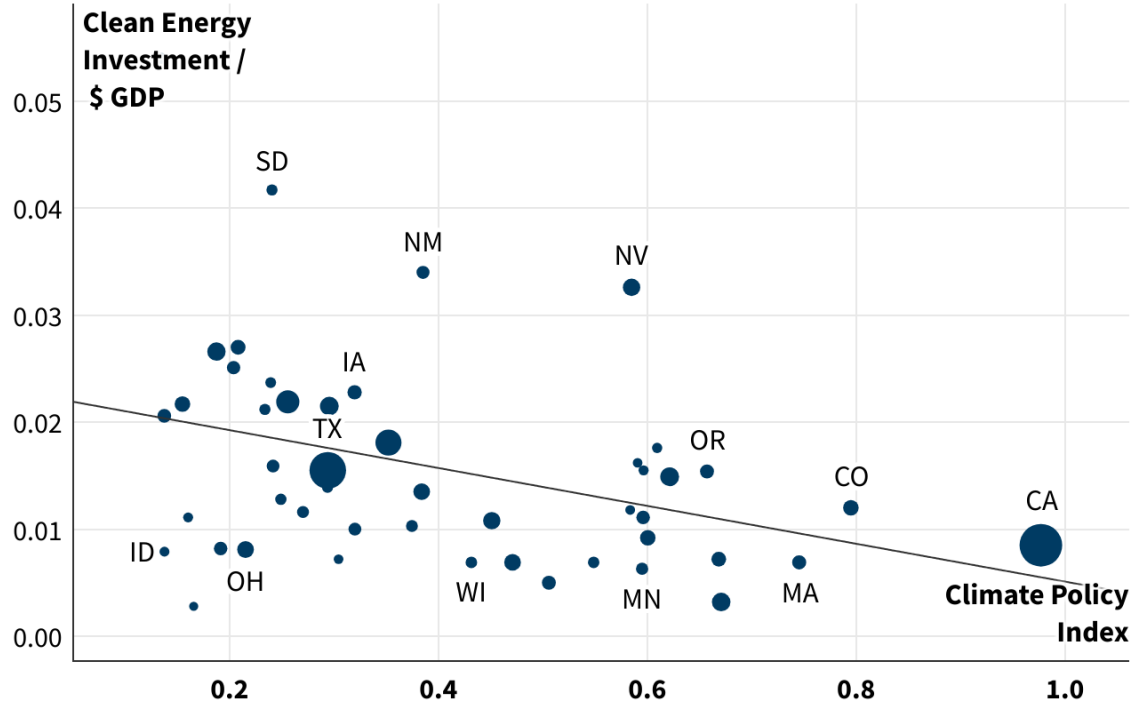


Chart: RMI Graphic • **Source:** Clean Investment Monitor; Climate Xchange

Clean Energy Investment Doesn't Necessarily Follow Climate Policy

Some of the states with the most ambitious climate policies have seen the least clean energy investment since 2018, and vice versa.



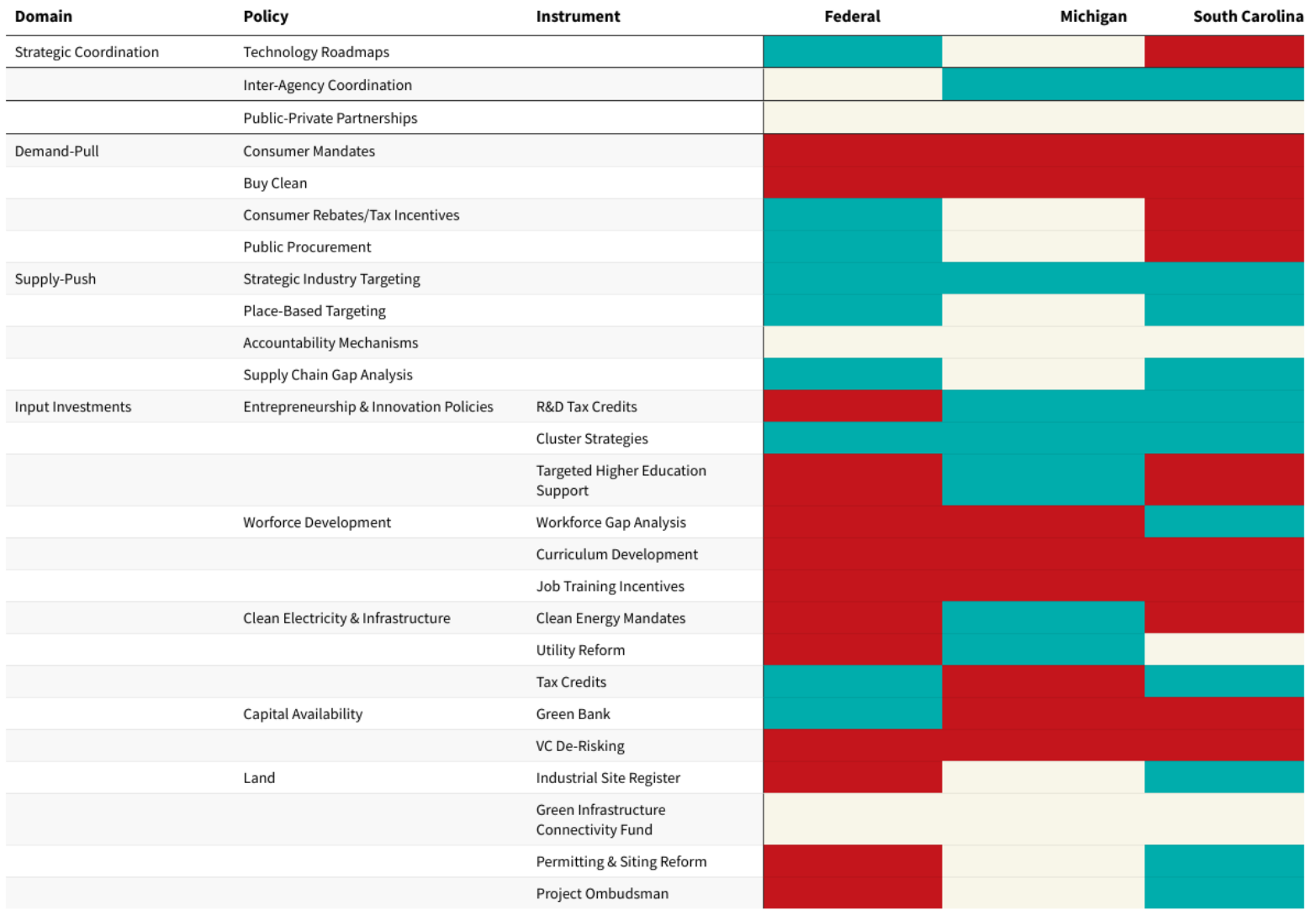
Source: Clean Investment Monitor; Climate Xchange

Industrial strategy is industry-specific

A more effective approach will be to identify priority industries and develop targeted strategies for unlocking investment.

EV battery manufacturing policy gap analysis

Industrial policies to develop a competitive EV battery manufacturing industry in the Great Lakes are unevenly applied across the region. Michigan is leading among Great Lakes states.



Domain	Policy	Instrument	Federal	Michigan	South Carolina
Strategic Coordination	Technology Roadmaps		Strong	Moderate/TBD	Weak
	Inter-Agency Coordination		Moderate/TBD	Strong	Strong
	Public-Private Partnerships		Moderate/TBD	Moderate/TBD	Moderate/TBD
Demand-Pull	Consumer Mandates		Weak	Weak	Weak
	Buy Clean		Weak	Weak	Weak
	Consumer Rebates/Tax Incentives		Strong	Moderate/TBD	Weak
	Public Procurement		Strong	Moderate/TBD	Weak
Supply-Push	Strategic Industry Targeting		Strong	Strong	Strong
	Place-Based Targeting		Strong	Moderate/TBD	Strong
	Accountability Mechanisms		Moderate/TBD	Moderate/TBD	Moderate/TBD
	Supply Chain Gap Analysis		Strong	Moderate/TBD	Strong
Input Investments	Entrepreneurship & Innovation Policies	R&D Tax Credits	Weak	Strong	Strong
		Cluster Strategies	Strong	Strong	Strong
		Targeted Higher Education Support	Weak	Strong	Weak
	Worforce Development	Workforce Gap Analysis	Weak	Weak	Strong
		Curriculum Development	Weak	Weak	Weak
		Job Training Incentives	Weak	Weak	Weak
	Clean Electricity & Infrastructure	Clean Energy Mandates	Weak	Strong	Weak
		Utility Reform	Weak	Strong	Moderate/TBD
		Tax Credits	Strong	Weak	Strong
	Capital Availability	Green Bank	Strong	Weak	Weak
		VC De-Risking	Weak	Weak	Weak
	Land	Industrial Site Register	Weak	Moderate/TBD	Strong
		Green Infrastructure Connectivity Fund	Moderate/TBD	Moderate/TBD	Moderate/TBD
		Permitting & Siting Reform	Weak	Moderate/TBD	Strong
		Project Ombudsman	Weak	Moderate/TBD	Strong

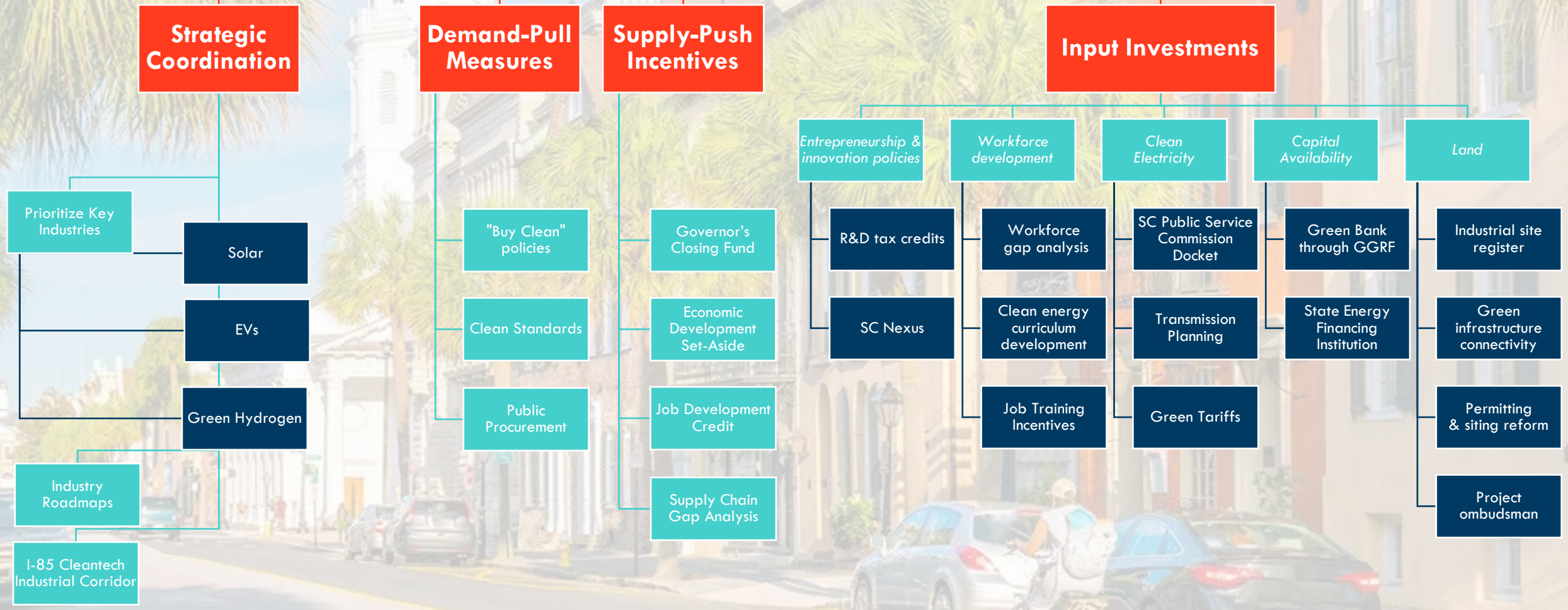
Weak
Moderate/TBD
Strong

Table: RMI Graphic • **Source:** RMI analysis

South Carolina's Opportunities for a Cleantech-Led Economic Development Strategy

RMI – Energy. Transformed.

A Clean Energy-Led Industrial & Economic Development Strategy for South Carolina



Emerging opportunities: Cleantech-led Economic development strategy

Economic Development Plan

Last plan was 2020–2023, and the energy/policy environment has changed dramatically.

Industry Roadmaps

A new plan should dive into strategic industries, identifying specific investment barriers and valuable solutions.

Strategic Industry Coordination

- EV supply chain
- Green building construction
- Solar electricity
- Nuclear
- Low-carbon chemicals
- Green hydrogen

Place-Based Coordination

- I-85 Cleantech Industrial Corridor
- SC Nexus

Demand-Pull Mechanisms:

- "Buy Clean"
- Clean electricity/vehicle/building/industry standards

Production Incentives

- Governor's Closing Fund
- Economic Development Set-Aside
- Job Development Credit

Input Investments:

- Regional transmission
- Innovation strategy
- Workforce strategy
- Green Bank
- SEFI eligibility

Emerging opportunities: I-85 Cleantech Corridor

I-85 Cluster Strategy

A series of large projects in the EV Supply Chain could anchor a cleantech cluster along the I-85.

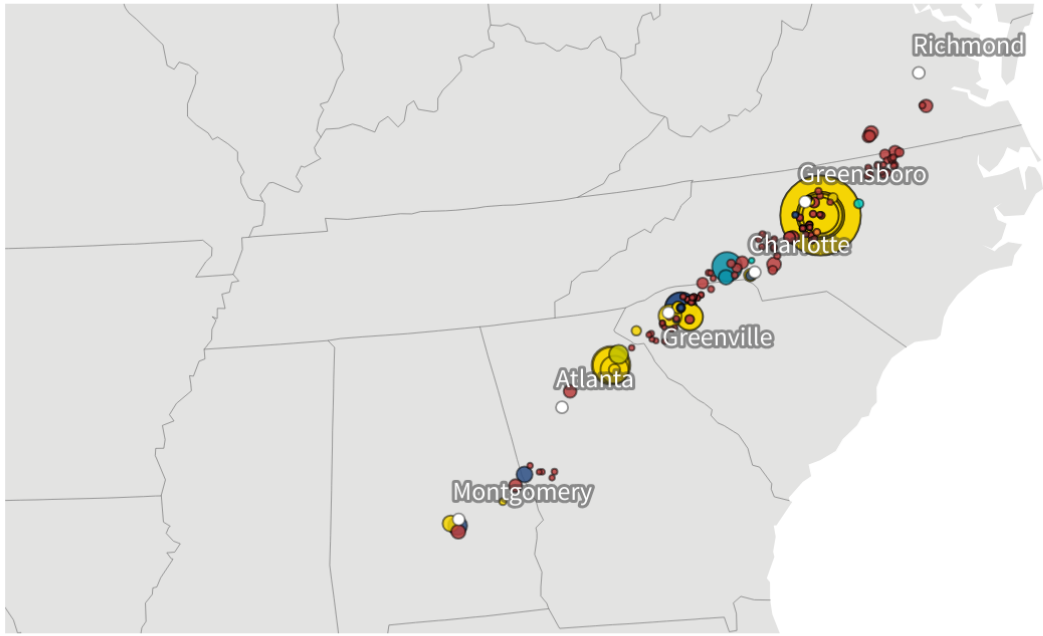
Regional Coordination

A shared investment attraction and retention strategy could "lift all boats."

The I-85 Clean Industrial Corridor

Over $40 billion worth of clean energy projects have been announced, are under construction, or fully operating along the I-85 corridor

Batteries | Critical Minerals | Fueling Equipment | Other | Solar | Storage | Zero Emission Vehicles



Map: RMI • **Source:** Clean Investment Monitor

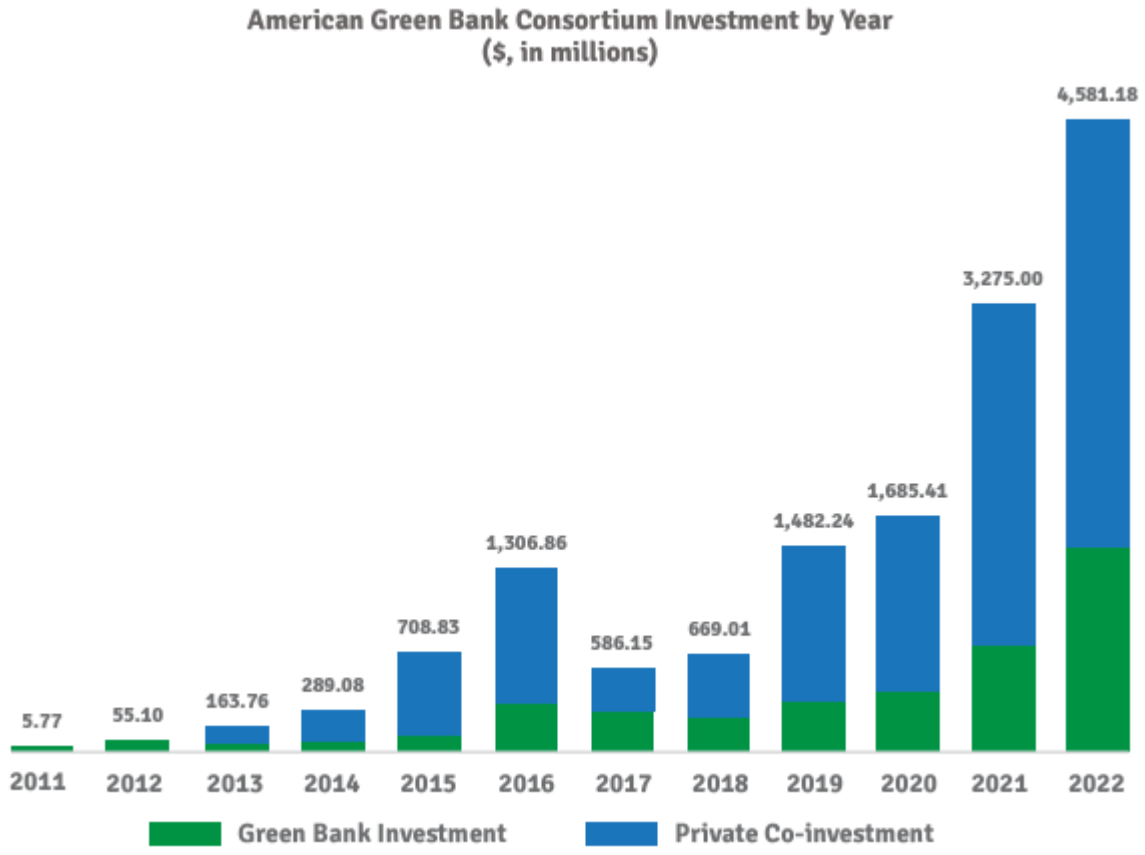
Emerging opportunities: State Energy Financing Institution (SEFI)

Why should states establish a SEFI Program?

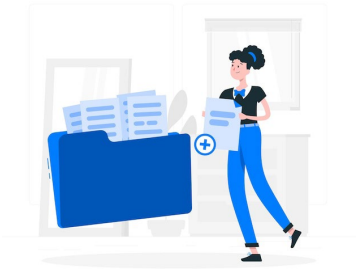
- By funding or financing as little as **1%–5% of project costs** through an eligible SEFI, states can now strategically access $40 billions in low-interest federal financing for large economic development projects.
- An LPO loan will typically cover **60%–70% of the total costs,** and project loans should typically be greater than $100 million.
- The state or a project sponsor may form a **special purpose vehicle (SPV)** to aggregate smaller projects into a portfolio that can use smaller portions of the $100 million loan.

Emerging opportunities: Greenhouse Gas Reduction Fund (GGRF) & South Carolina Green Bank

- Green banks are an innovative financial tool for climate-conscious economic development.
    - Green banks sustainably facilitate the expansion of renewable energy and disaster-resistant infrastructure by strategically allocating and growing an initial endowment of funds
- Green Banks can serve multiple roles:
    - Connector, risk mitigator, direct lender, bundler
- Replicable model: South Carolina Transportation Infrastructure Bank
- Opportunity is multiplied thanks to the GGRF

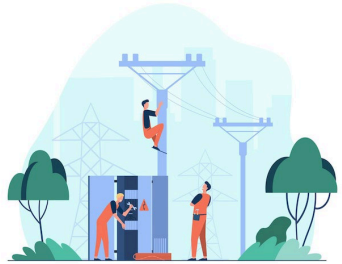


Emerging opportunities: Ensure clean electricity demands from industrial users are met



SC Public Service Commission

Open a docket to design fair and transparent rates for large customers, including exploring new tariff options.



Transmission Planning

Work with state legislators to promote multi-value long-term transmission planning. Advocate for regional grid coordination with neighboring states.

Green Tariffs

A standardized option for commercial and industrial customers to purchase bundled clean power from a specific clean generation facility through a special utility rate design.

Customized Tariffs

Bespoke tariffs that meet customer needs while maintaining regulatory priorities (e.g., the Clean Transition Tariff in Nevada).

Image source: Freepik

Emerging Opportunities: Miscellaneous

Innovation Strategy

SC Nexus
Designated EDA Tech Hub. Received $45M federal grant and allocated $15M in latest SC budget.

Intra-Gov Coordination

Power SC
Alignment of key SC government stakeholders to develop strategic plans to ensure state has sufficient energy capacity.

Strategic Planning

Priority Climate Action Plan
Leverage existing PCAP to advance climate action and economic development.

Grid Infrastructure

Utility Collaboration
Capitalize on utility clean energy programs by increasing awareness among customers and looking for examples for utility/customer partnerships.

Workforce Development

EV Workforce Assessment
Further workforce assessments should be conducted in emerging and/or growing cleantech sectors like nuclear, transmission, and hydrogen.

Investment Incentives

Tax Credit Reform
South Carolina has >30 incentives that could better target clean, strategic industries for economic growth.

Thank you and stay in touch!

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Tessa Weiss (tweiss@rmi.org)