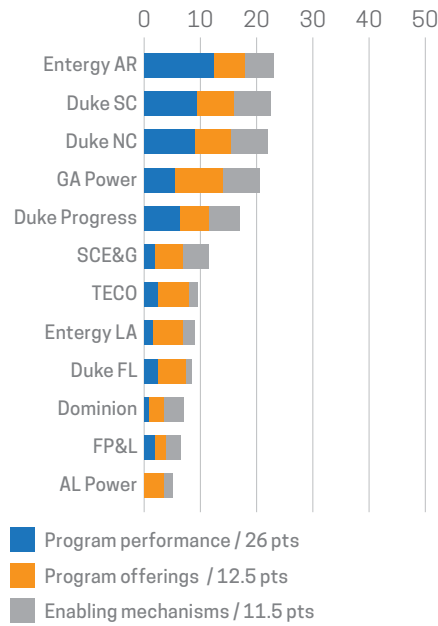
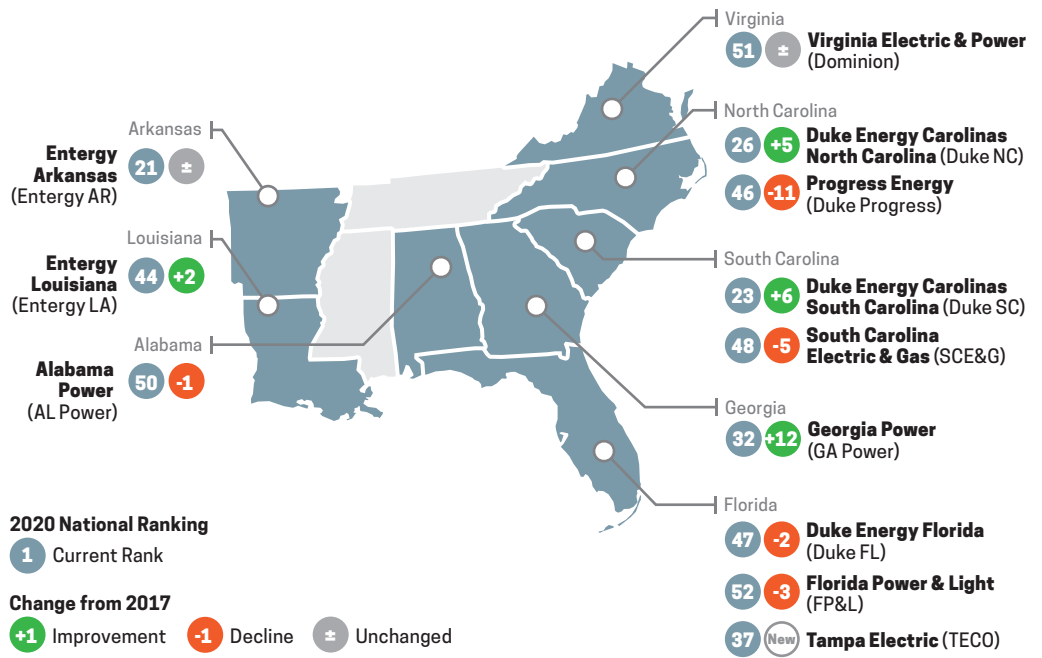


Points earned by southeastern utilities



Southeast



Highlights and Opportunities

The highest-ranking southeastern utilities in the 2020 Utility Energy Efficiency Scorecard are Entergy AR in 21st place, followed by Duke SC in 23rd place and Duke NC in 26th. The performance of the region's utilities varies, with utilities falling in the middle to lower half of the Scorecard rankings. Energy efficiency progress has been mixed, with some utilities increasing in rankings since 2017 (Duke SC, Duke NC, GA Power, Entergy LA), some utilities falling (Duke Progress, SCE&G, Duke FL, FP&L, AL Power), and some utilities maintaining the same rank (Entergy AR, Dominion). GA Power in particular rose markedly in the rankings this year, from 44th in 2017 to 32nd in 2020.

This report largely represents a snapshot of how the utility energy efficiency landscape has changed from the previous edition to 2018; promising new policies or developments that have arisen since 2018 may not have been captured in our scoring. For example, in response to Virginia's Grid Transformation and Security Act passed in 2018, Dominion's regulators approved 11 new energy efficiency programs that the utility began to implement in 2019. SCE&G also proposed new or modified demand-side management programs in 2019, a suite of seven residential and three nonresidential programs. These efforts will be captured in the next Scorecard and may result in an increase in performance.

Category 1. Annual and lifetime energy savings, demand savings, efficiency spending, and program participation

The southeastern utilities varied in efficiency program performance, scoring between 12.5 out of 26 points (Entergy AR) and no points (AL Power). The Southeast ranks last compared to the other regions in this category. On average, the region's utilities scored a total of about 4.5 points on program performance, lower than the average for all US utilities (9.5 points). Of these utilities, only Entergy AR achieved savings above the national average of 1.03% of total sales, saving about 1.08%. Southeastern utilities spent an average of about 1.06% of revenue on efficiency, less than half the national average of 2.6%.

Category 2. Portfolio comprehensiveness including new, existing, low-income, and electric vehicle offerings

On average the southeastern utilities scored below the rest of the country for the comprehensiveness of their program offerings. For example, GA Power's portfolio included 20 different core programs and 6 emerging programs, whereas Dominion offered only 3 of the core programs and 1 emerging program. Most of the utilities offer residential home retrofit programs, as well as commercial and industrial custom and lighting programs. All but two offer both residential and commercial HVAC programs. This region had largely not yet pursued electric vehicle offerings as of 2018, with only GA Power offering both programs that offer incentives for electric vehicle charging infrastructure programs and rates that encourage drivers to charge their vehicles efficiently. The utility had proposed additional programs beyond those that were already approved to further aid in developing charging infrastructure.

Category 3. Mechanisms to enable efficiency, including advanced metering, savings targets, rate design, the utility business model, and resource planning

Duke NC and Duke SC, as well as GA Power, led the region with enabling mechanisms for energy efficiency. As of 2018, five utilities had deployed advanced metering infrastructure to over 75% of customers (Duke NC, Duke SC, GA Power, FP&L, AL Power). Duke's three southeastern utilities led the region with strong energy savings targets with each utility's targets adding to more than 2% over the course of 2018-20. Dominion is encouraging energy efficiency through its residential rates, by keeping its customer charge low (under \$7) and by offering time-of-use rates. Utility resource plans in the Southeast typically consider efficiency as a demand resource, but TECO considers efficiency as a supply resource, and Dominion considers it as both.