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Derisking solar projects in the wake of the One Big Beautiful Bill

16 September 2025

9:00 am – 10:00 am | PDT, Los Angeles
12:00 pm – 1:00 pm | EDT, New York City
6:00 pm – 7:00 pm | CEST, Berlin

Rachel Metea
Associate Editor
pv magazine USA

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Senior Market Advisor
PVcase

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pv magazine webinars

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Send them in via the Q&A tab. 👉 We aim to answer as many as we can today!

You can also let us know of any tech problems there.

We are recording this webinar today. 📹

We‘ll let you know by email where to find it and the slide deck, so you can re-watch it at your convenience. 👀 💡

09 – 16 – 25

2025 SOLAR CHALLENGES

De-risking solar projects in the wake of the One Big Beautiful Bill

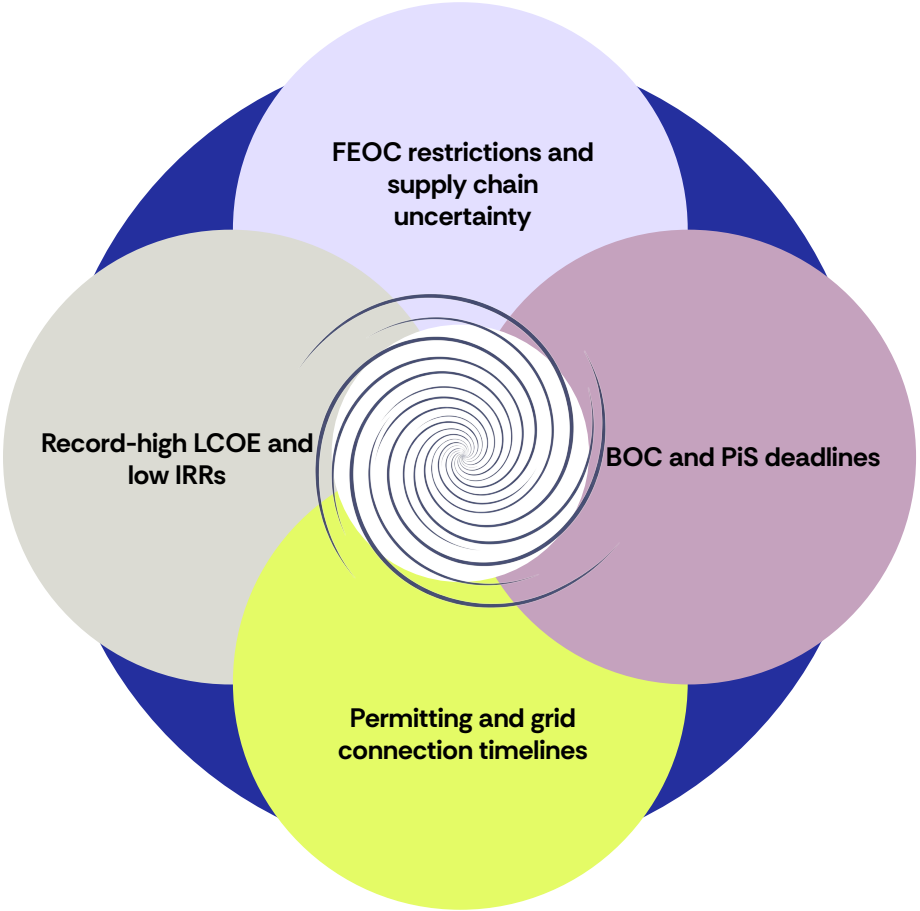
Miguel Herrero
Senior Market Advisor

PVCASE

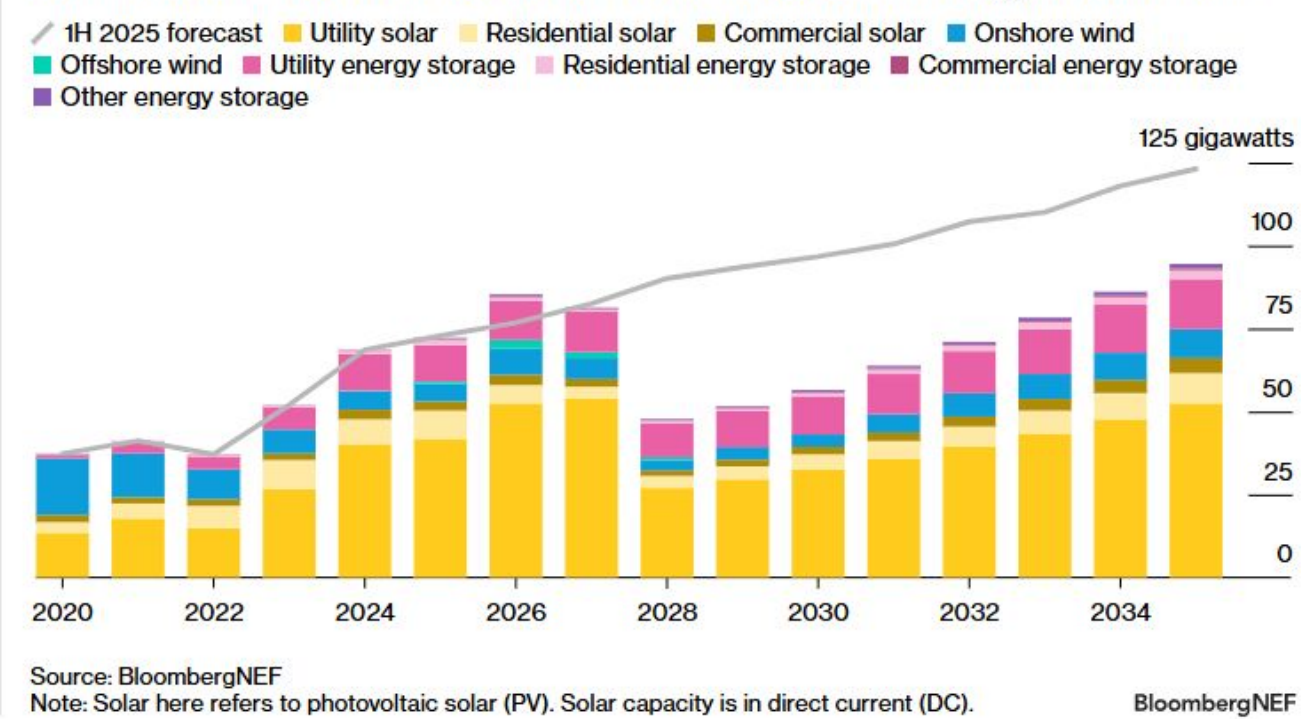
Agenda

1. Paradoxes of the OBBB
2. What's next for solar project development in the USA?
3. De-risking solar projects in the wake of the OBBB
4. 3 best practices to take away today!

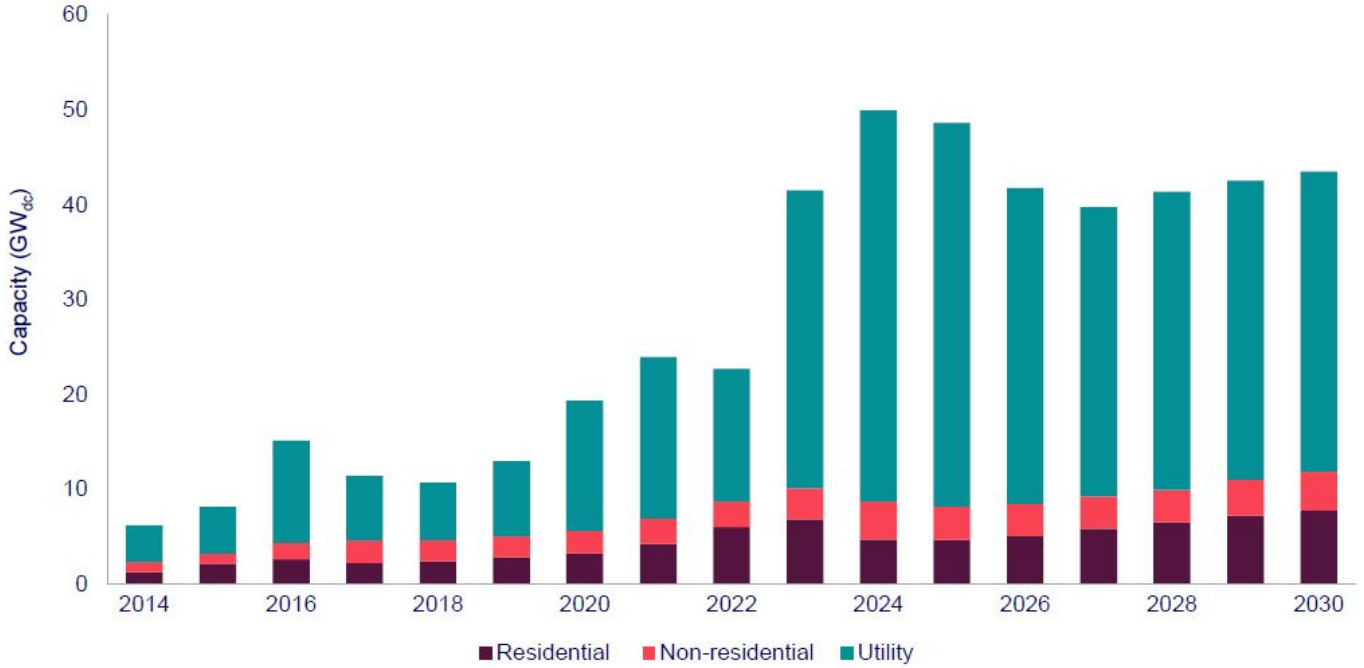

ONE BIG
BEAUTIFUL
BILL ACT


FEOC restrictions and supply chain uncertainty
Record-high LCOE and low IRRs
BOC and PiS deadlines
Permitting and grid connection timelines

Forecasts show a turbulent few years ahead, with BNEF modelling a cliff-edge after 2027

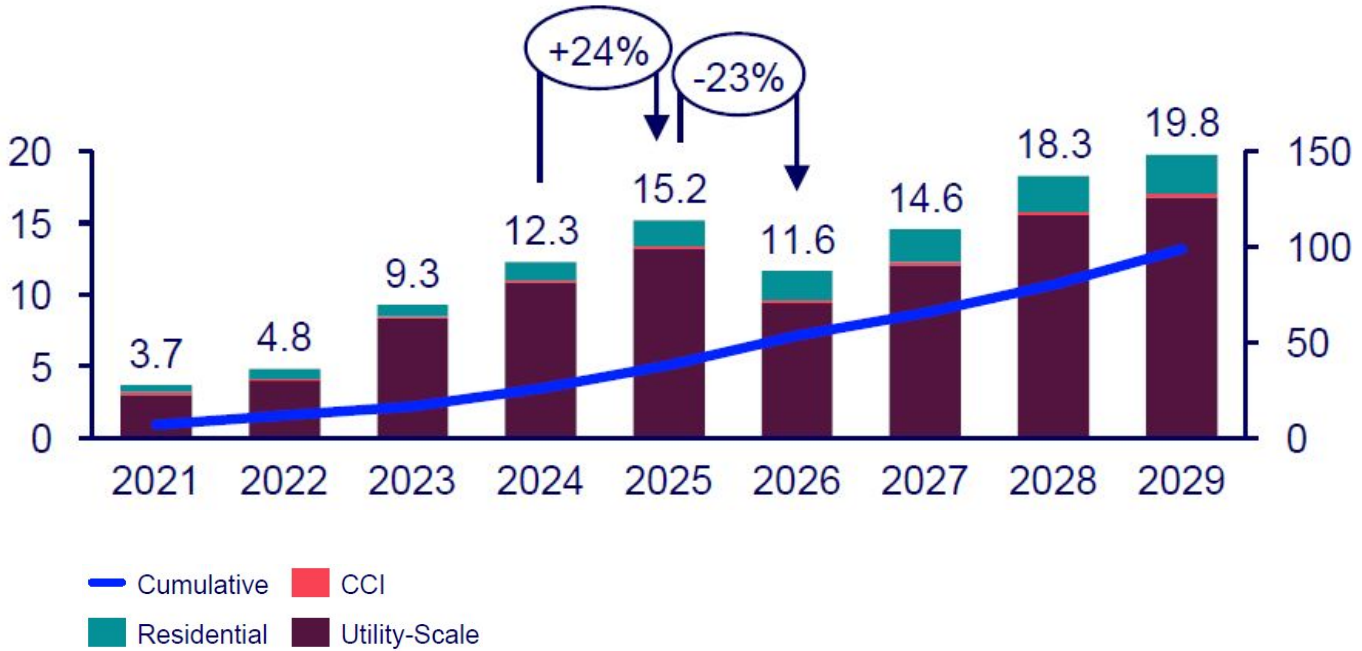


Woodmac forecasts show a more gradual decrease, happening now



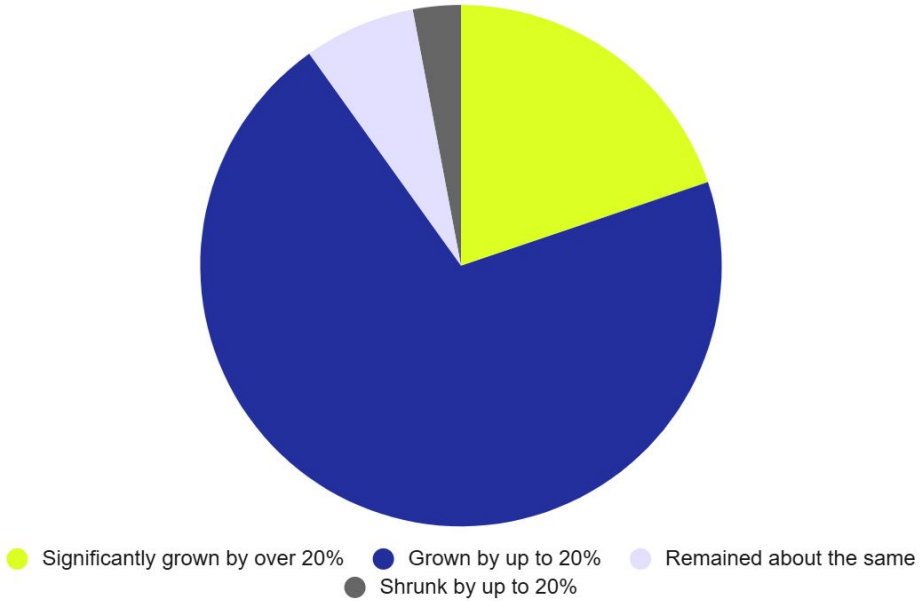
Source: Wood Mackenzie

Woodmac forecasts BESS deployment to dip in 2026, returning to growth in 2027



Survey of 101 solar industry professionals in the USA has revealed strong past project pipeline growth...

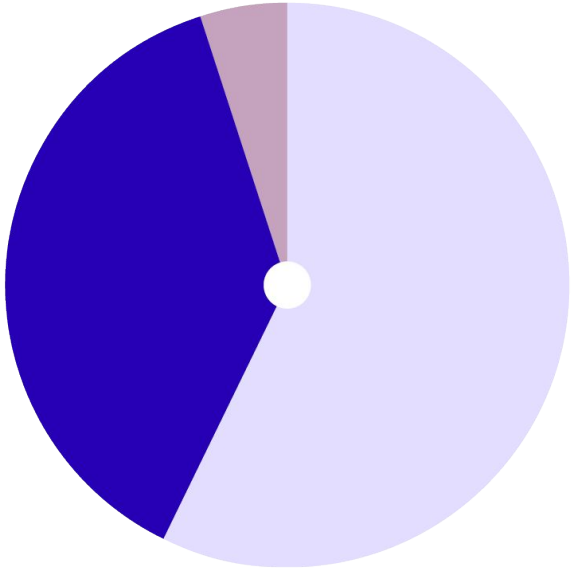
In the past year, how has your pipeline of solar projects changed?



...and expectations of continued growth over the next two years

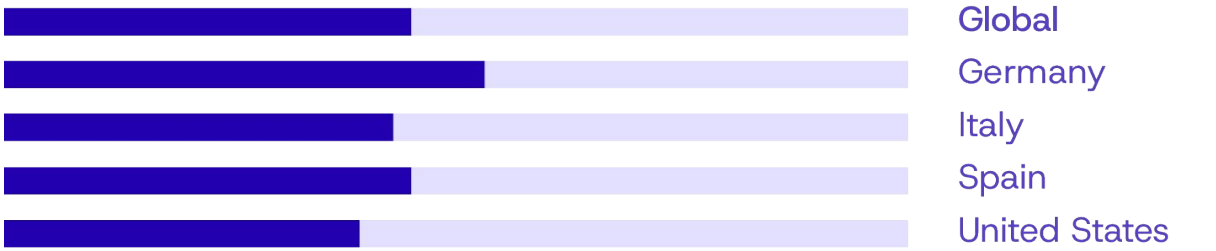
How much growth, if any, do you expect the solar market in the next 2 years?

- Will grow over 10%
- Will grow up to 10%
- Will stay about the same

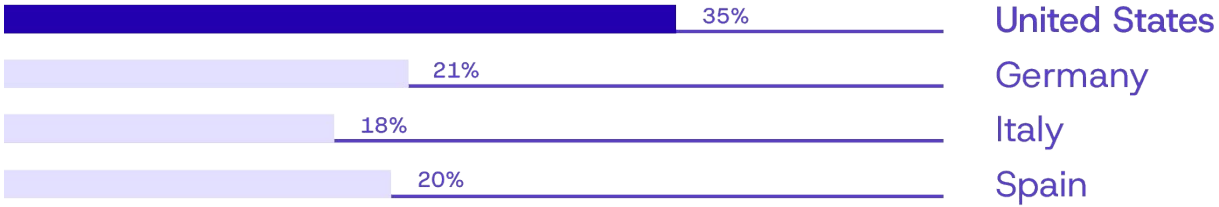


Expectations about project pipeline

US project developers rely on equity much more than those in other countries and are more likely to see payback times under 5 years



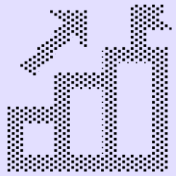
Debt versus equity



Return of invesment in less than 5 years

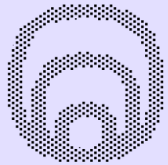
US respondents indicated financing challenges, regulatory instability, and stakeholder management as the most important reasons for project failure

1st



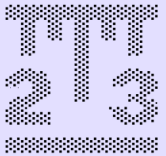
Challenges to finance projects
70%
(20% = Top Reason)

2nd

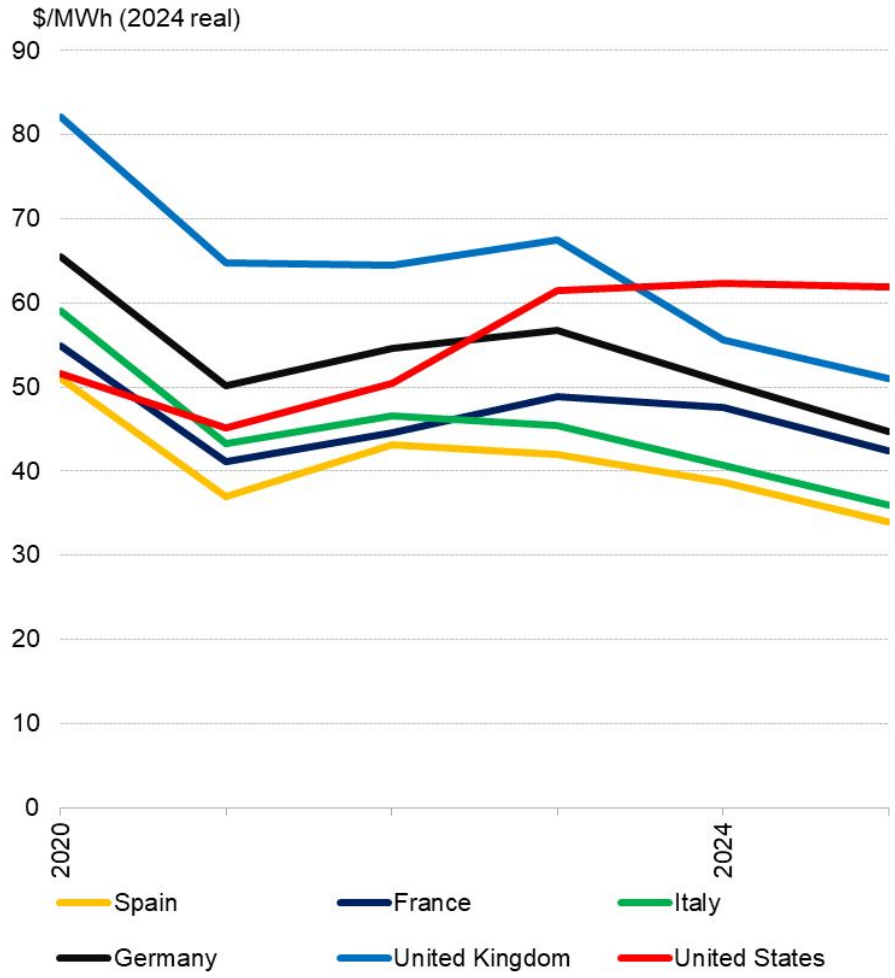


Regulations are always changing
67%
(31% = Top Reason)

3rd



Too many stakeholders
66%
(21% = Top Reason)



Utility-scale solar LCOE is significantly higher in the USA than in Europe

25 $c/W

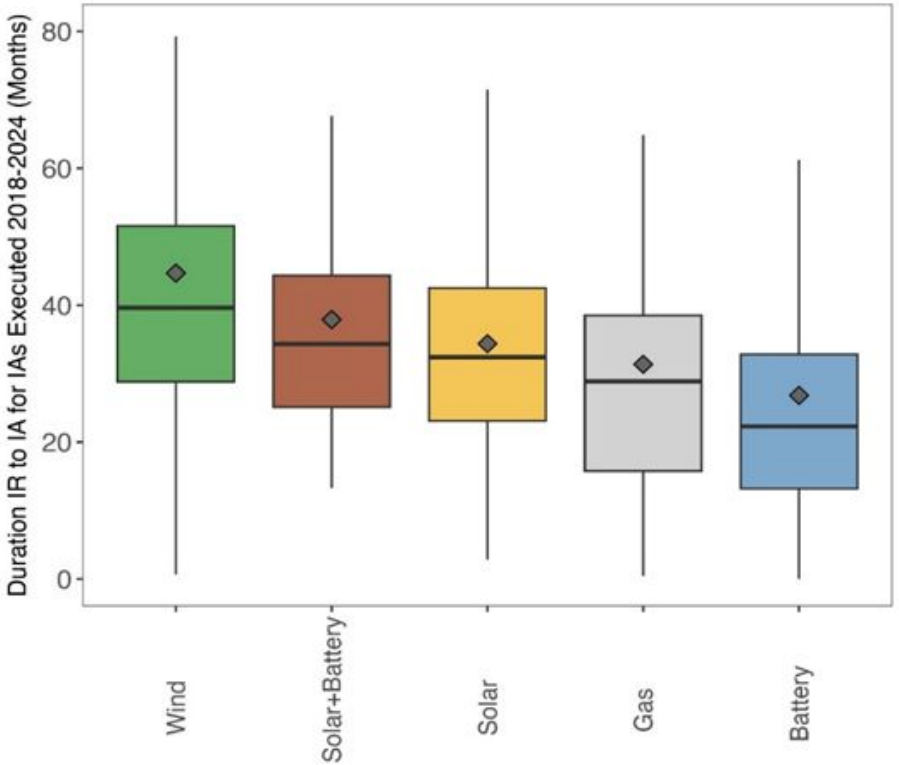
vs.

9 $c/W

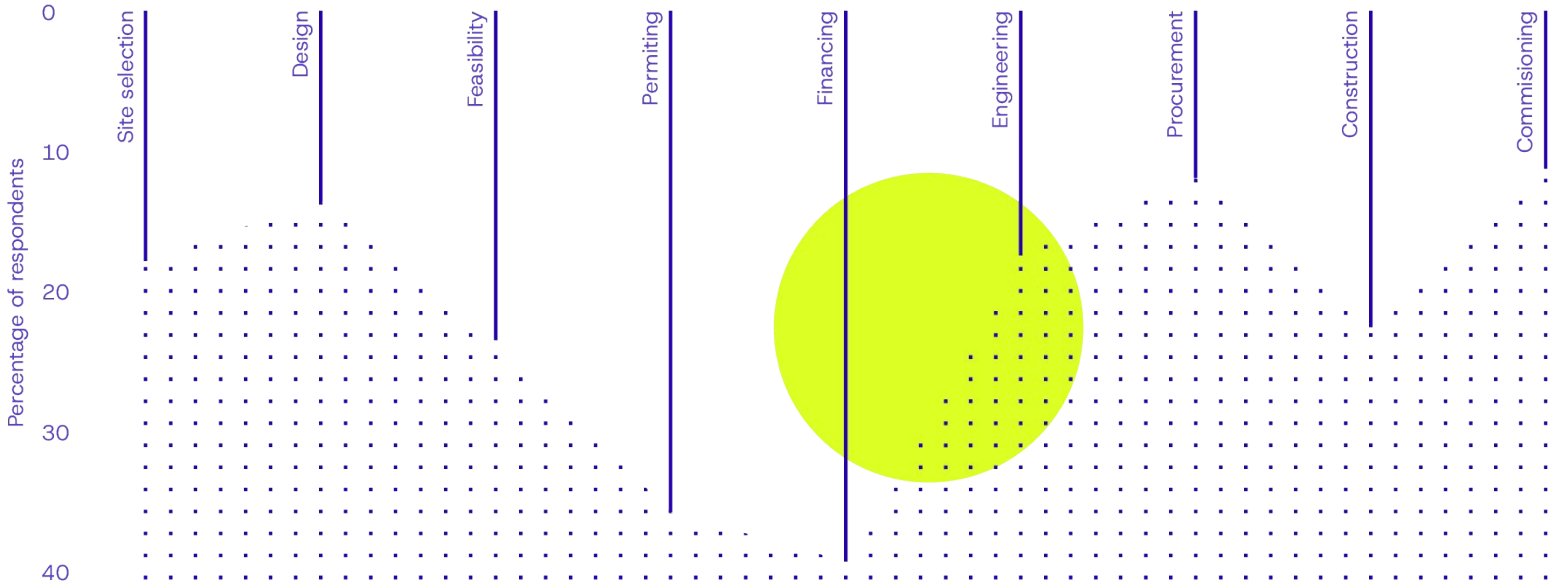
Record high EPC costs

Both likely to continue under current conditions

Long permitting lines mean solar projects in pipeline are unlikely to meet BOC or PiS deadlines



Financing and permitting/grid connection are the riskiest stages for solar projects

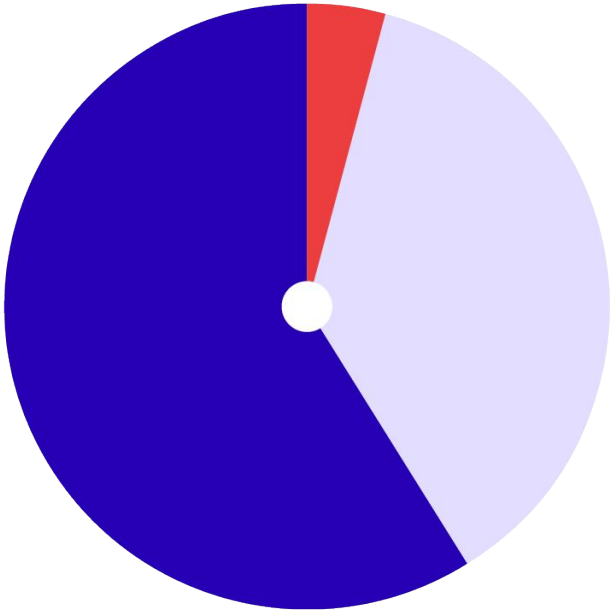


The pre-construction "Valley of Death": the riskiest steps in project development

So what's next for solar project development in the USA?

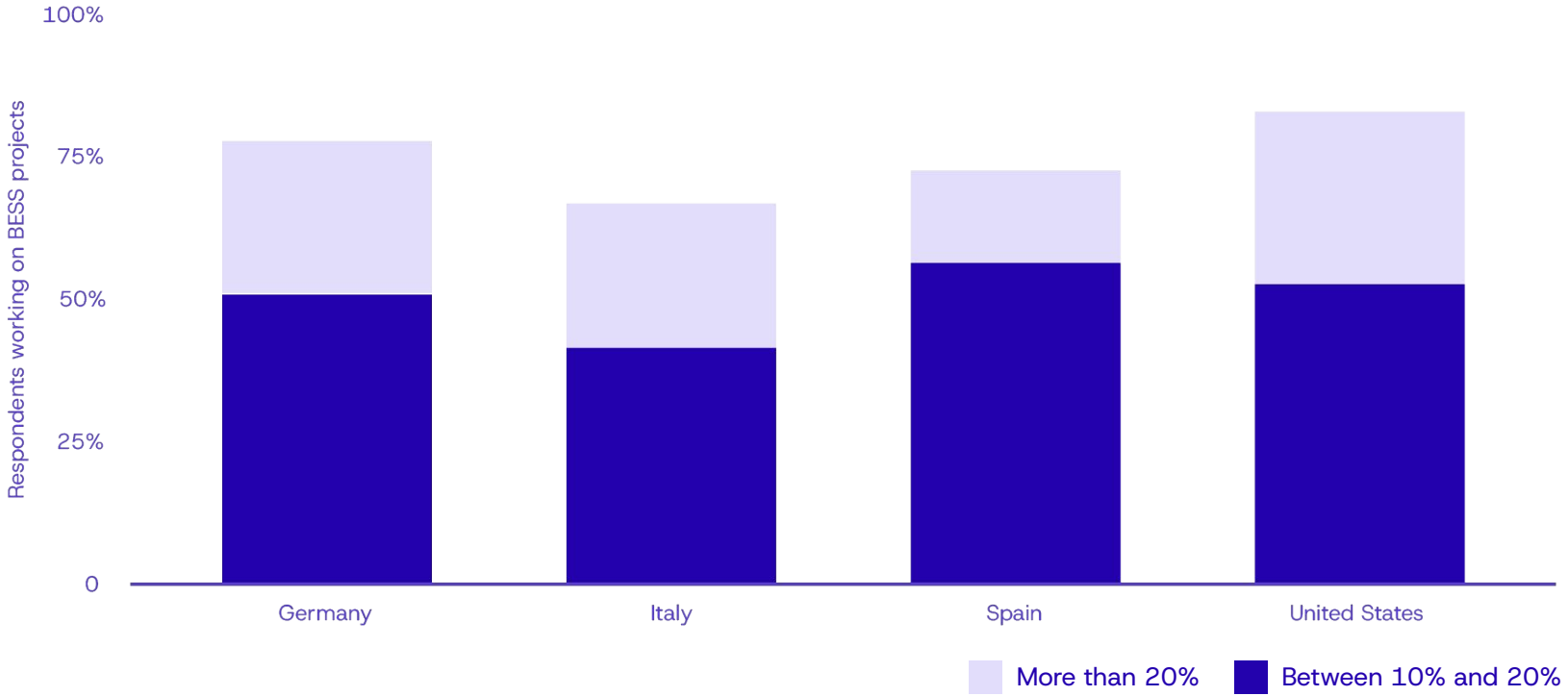
High-quality engineering is critical for project success according to a majority of US solar developers

- Strongly agree
- Somewhat agree
- Somewhat disagree

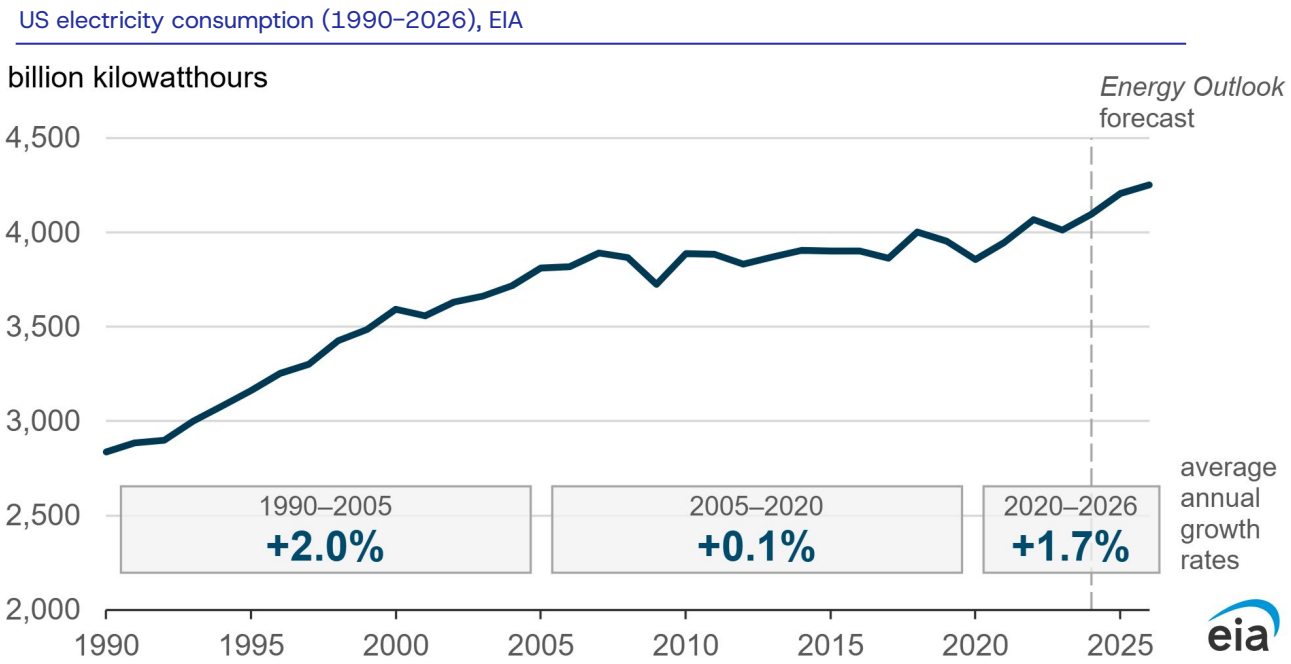


High quality engineering is the most important factor for success in solar PV project developments

The US has the highest share of solar developers working on BESS projects

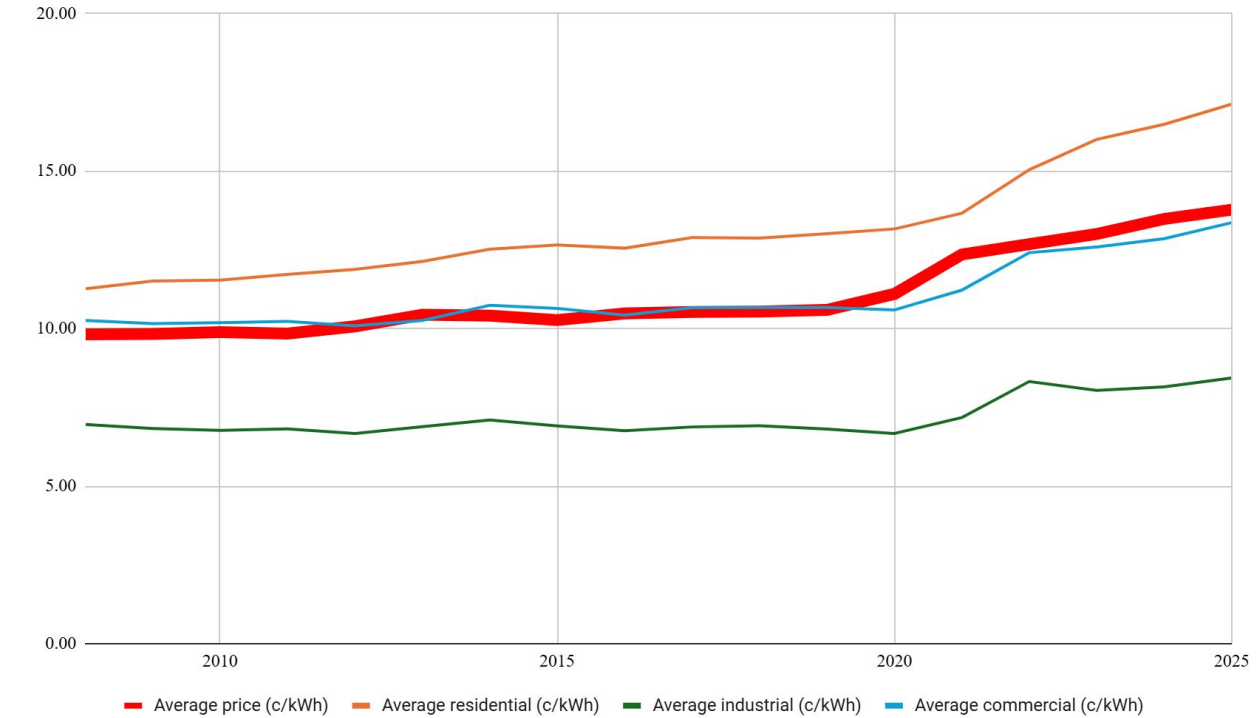


Electricity demand is growing, after remaining stable for over a decade…



… pushing electricity prices up

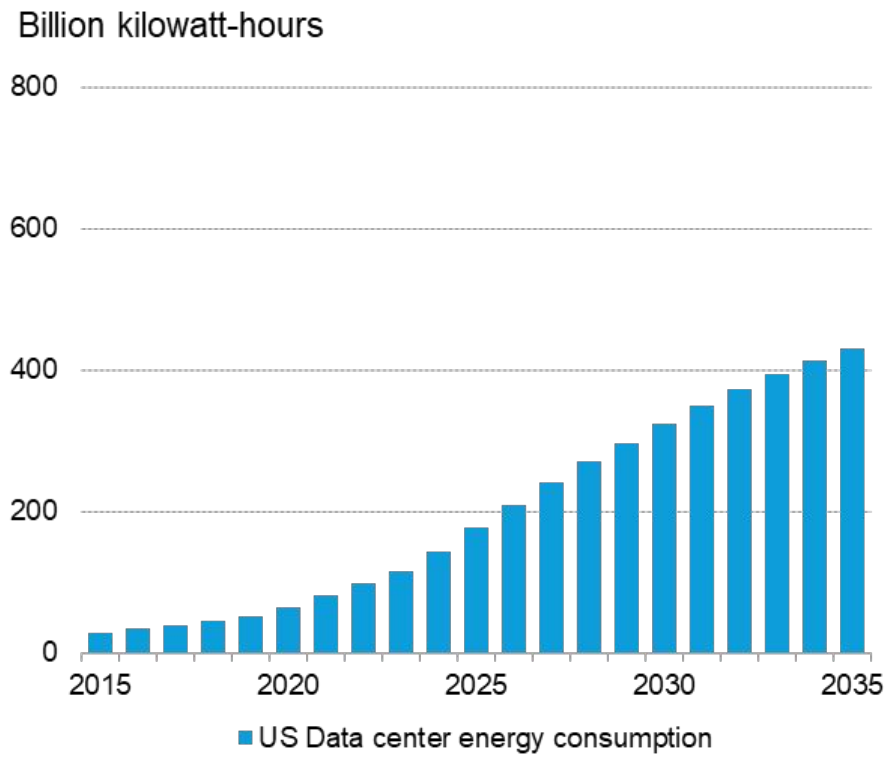
US average electricity prices (2008–2025), EIA



End-use electrification

Data centers

Data center power consumption is forecast to more than double over the next 10 years, according to conservative estimates



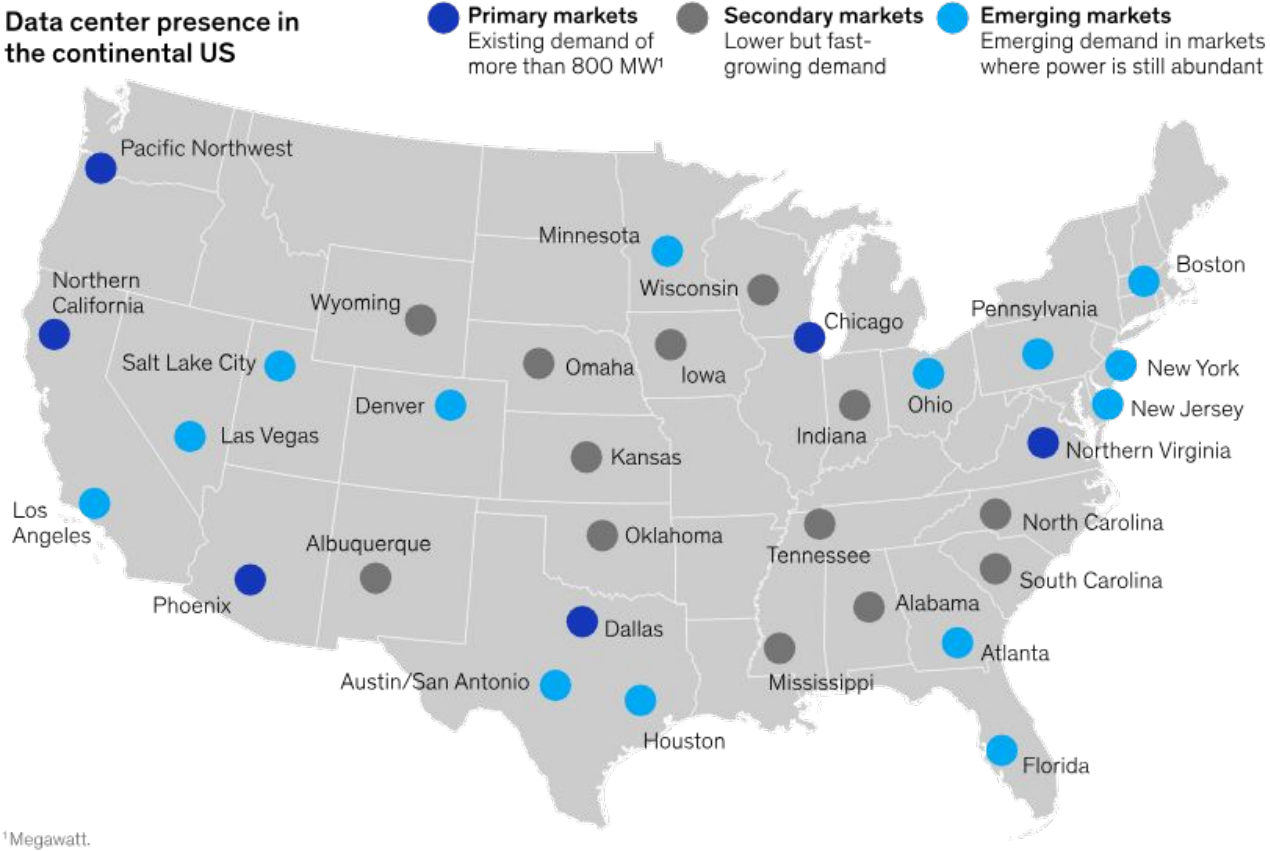
Data center development is constrained by 3 critical components

Land

Connectivity

Power

Data center presence in the continental US



[1]Megawatt.
Source: Datacenters.com; S&P Global Market Intelligence 451 Research; McKinsey Data Center Demand model

De-risking solar projects in the wake of the OBBB

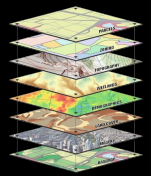
Best Practice #1

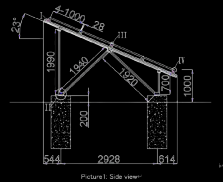
Win the project development race by front-loading engineering due diligence

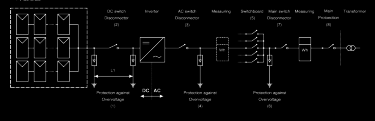
Projects with sloppy or inaccurate initial engineering are far more likely to get kicked back by AHJs, ISOs, and investors

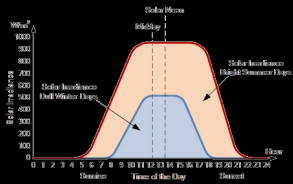
De-risking projects by analysing multiple layout scenarios, optimizing for yield, and

➔ Ensuring projects are robust from an early-stage significantly reduces the chance of rejection.







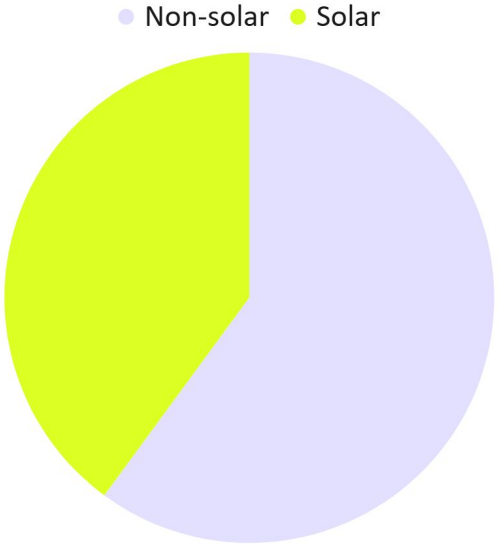


Project phases

Best Practice #2

Eliminate costly errors with solar project development software

Typical solar projects can require dozens of software tools and data formats, with over 60% of the tools used in solar project development are not solar specific



Standardizing tools and create a single source of truth for project data

➔ Reduce information silos, minimize opportunities for manual errors, and speeds up the process

Best Practice #3

Embrace automation

Manually executing repetitive tasks like topographical analysis, layout generation, or stringing can be extremely time consuming

Automating these processes frees up highly-skilled engineers time

➔ Focus can be placed on high-value strategic decisions that make or break projects

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2025 State of Solar Development

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09 – 16 – 25

2025 SOLAR CHALLENGES

Discussion

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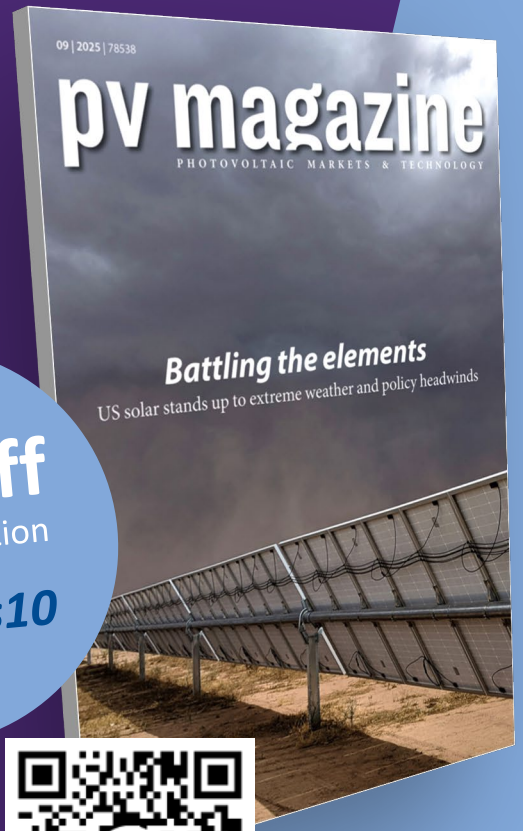

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