

Project Pipeline

By MAKE Consulting

July 2010

U.S. Project Pipeline Report

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Despite the likelihood of a lackluster 2010, industry leaders hold to hopes that the U.S. market will return to strength in 2011. Order intake has been slow, but analysis of the U.S. wind space shows the presence of over 90 GW of projects in various stages of development. Pent-up demand may find temporary relief in 2011 and 2012, due to the expiration of the ITC and PTC incentive programs.

Project pipelines are strongest in the Midwest and North Central corridor, where transmission investment will be critical to unlocking vast wind resources. Similarly, major wind developments in Texas continue to drive strength in the South Central region, while the Northeast pipeline contains a number of higher risk offshore wind projects.

Execution of existing project pipelines faces significant headwinds with continued weakness in electricity demand and low natural gas prices. Climate legislation has also stalled, with considerable concern focused on cap & trade provisions preventing the adoption of a robust Federal Renewable Energy Standard.

However, new guidance for the popular Section 1603 Grant Program was released by the U.S. Treasury last week, and should help kickstart additional sales activity in 2H10. Finally, actions to extend the Section 1603 Grant Program and implement a utility only cap & trade bill are in full swing and should provide additional pipeline support.

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MAKE's research is an essential market intelligence tool for the entire firm:

- Reports and forecasts that give analysts the data they need
- Research to help drive successful program decisions
- C-level briefs to ensure business leaders have the latest information

As a guideline, our research is published as illustrated in the figure below:

	Q1	Q2	Q3	Q4
Market Reports	Market Outlook	Supply Side	Demand Side	WTG Trends
Business Studies		U.S. Wind Power	Offshore Wind Power	China Wind Power
Research Notes	Min. Two Research Notes	Min. Two Research Notes	Min. Two Research Notes	Min. Two Research Notes
Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes	Min. Five Flash Notes
Forecasts	Annual/Semiannual/Quarterly	Quarterly	Semiannual/Quarterly	Quarterly
Project Pipelines		Project Pipeline	Project Pipeline	Project Pipeline
Policy Event Horizons	Policy Event Horizon		Policy Event Horizon	

Market Reports are 40-60 pages of high quality industry forecasts, trend spotting and analysis, giving the reader a detailed insight into the demand side, the supply side, wind power development in a range of countries as well as current WTG trends. Our market reports are published four times a year.

Business Studies are 60-100 pages detailed in-depth strategic market studies of key segments of the wind industry. In 2010 the business studies will focus on the US-, offshore,- and China wind power markets.

Research Notes are 10-20 pages of comprehensive analysis of specific trends in the industry. They are published 8 times a year and cover topics such as capacity shortages, order announcements, emerging markets, policy changes and strategic changes in the competitive landscape etc.



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Market forecasts and data are published annually, bi-annually and quarterly depending on subscription level and include forecasts of new installations and accumulated MWs on a 5 year scale divided on specific regions and on a global basis.

Project Pipelines offer an overview of the current project pipelines in selected regions and is published with reference to the business studies.

Policy Event Horizons are published bi-annually and provide updates on upcoming legislative events in key markets including potential outcomes.

Analyst Presentations are up-to-date insight from MAKE analyst presentations held at conferences and industry events around the globe.

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Semiannual Policy Horizons			✓
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Prices (EUR) Corporate/Personal	4,000 / 2,500	9,500 / 6,500	11,500 / 7,500

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