

# Global Policy Horizon

By MAKE Consulting

November 2011

## 2H 2011 Global Policy Horizon

### Contents

- **Methodology**
- **Executive Summary**
- **Country Summary**
- **Global Policy Overview**
- **Americas**
  - U.S.
  - Canada
  - Brazil
  - Mexico
- **Europe**
  - Germany
  - UK
  - France
  - Spain
  - Italy
  - Romania
  - Sweden
  - Poland
  - Portugal
- **Asia Pacific**
  - China
  - India

Policy development continues to shape the global wind power industry. Although wind power technology has become largely mainstream, the industry still relies on supportive policy measures to ensure investment and long-term growth. This has become particularly true in 2011 due to headwinds stemming from both sagging economic conditions and further utilization of new extraction methods that have driven down the price of natural gas in certain markets in the Americas and in Europe.

The U.S., the largest market in the Americas, continues to lack a federal renewable energy target and a long term incentive mechanism, though tenders and grid expansion plans in other markets in the Americas support future development in the region. Europe has long term renewable targets in place, but an overhaul of policies is anticipated as a consequence of sovereign debt crisis in several European markets. Governments have already indicated amendments to current policy frameworks, which has raised uncertainty over future market conditions for wind power development. In Asia Pacific, growing environmental concerns coupled with increasing energy demand have led regional leaders in China and India to make long term commitment to renewable energy through policy supportive actions.

MAKE's Global Policy Horizon examines existing regulatory frameworks and expected near-term policy activity in the top 15 markets for expected wind power installations 2011e-2013e. The research assesses the four key policy areas that may impact wind power development in each market: Renewable Energy Targets, Incentives, Transmission, and Permitting.

**THIS GLOBAL POLICY HORIZON IS AVAILABLE TO SUBSCRIBERS OF OUR PREMIUM RESEARCH SUBSCRIPTION PACKAGE**

See the next pages for further information about our research subscription

Adding value to your renewable energy business

**MAKE**  
CONSULTING

### MAKE Consulting

**Headquarters**  
Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

**USA office**  
117 N. Jefferson Street, Suite 400  
Chicago, IL 60661  
USA

**USA office**  
225 Franklin Street, 26th Floor  
Boston, MA 02110  
USA

**P.R. China office**  
The Exchange Tower, 2916  
No. 189 Nanjing Road, Tianjin 300051  
P.R. China

info@make-consulting.com  
www.make-consulting.com

T: +45 7026 6628

T: +1 312-441-9590

T: +1 978 448 3186

T: +86 22 2318 5066

## Research Products

Clients subscribing to our research packages receive a range of market reports, business studies and research notes, up-to-date market forecasts and data, flash notes and ad-hoc analyst presentations.

Our research provides organizations around the world with detailed insight into the market's current technological, regulatory and competitive situation, putting facts into perspective by analyzing trends and making projections about the future.

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	Wind Turbine 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

*Annual publishing plan is tentative and subject to change*

**Market Reports** are 60-150 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 wind turbine 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 2011 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.

Adding value to your renewable energy business

**MAKE**  
CONSULTING

### MAKE Consulting

**Headquarters**  
Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

**USA office**  
117 N. Jefferson Street, Suite 400  
Chicago, IL 60661  
USA

**USA office**  
225 Franklin Street, 26th Floor  
Boston, MA 02110  
USA

**P.R. China office**  
The Exchange Tower, 2916  
No. 189 Nanjing Road, Tianjin 300051  
P.R. China

info@make-consulting.com  
www.make-consulting.com

T: +45 7026 6628

T: +1 312-441-9590

T: +1 978 448 3186

T: +86 22 2318 5066

**Flash Notes** are 1-2 pages of instant expert responses to important events. They are published ad hoc and cover topics such as M&A activities, major contracts, product launches, policy changes etc. Flash Notes are published minimum 20 times a year.

**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.

	Basic	Extended	Premium
Market Reports	✓	✓	✓
Annual Forecasts	✓	✓	✓
Analyst Presentations	✓	✓	✓
Business Studies		✓	✓
Semiannual Forecasts		✓	✓
Research Notes		✓	✓
Business Studies in PPT Format			✓
Quarterly Forecasts			✓
Flash Notes			✓
Semiannual Policy Horizons			✓
Project Pipelines			✓
Prices (EUR) Corporate/Personal	4,000 / 2,500	9,500 / 6,500	11,500 / 7,500



Adding value to your renewable energy business

**MAKE Consulting**

**Headquarters**

Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

T: +45 7026 6628

**USA office**

117 N. Jefferson Street, Suite 400  
Chicago, IL 60661  
USA

T: +1 312-441-9590

**USA office**

225 Franklin Street, 26th Floor  
Boston, MA 02110  
USA

T: +1 978 448 3186

**P.R. China office**

The Exchange Tower, 2916  
No. 189 Nanjing Road, Tianjin 300051  
P.R. China

T: +86 22 2318 5066

info@make-consulting.com  
www.make-consulting.com

## How to order...

### To order our research:

- Fill in this order form and fax it to  
DK: +45 8610 2736  
U.S.: +1 312 441 9591  
China: +86 22 2318 5001
- Order online at  
www.make-consulting.com
- Call us on  
DK: +45 7026 6628  
U.S. (Boston): +1 781 791 5045  
U.S. (Chicago): +1 312 441 9590  
China: +86 22 2318 5066
- Send an e-mail to  
info@make-consulting.com

## Order form

Product	Select product
Premium Subscription – Corporate (EUR 11500 + VAT)	
Premium Subscription – Personal (EUR 7500 + VAT)	
Extended Subscription – Corporate (EUR 9500 + VAT)	
Extended Subscription – Personal (EUR 6500 + VAT)	
Basic Subscription – Corporate (EUR 4000 + VAT)	
Basic Subscription – Personal (EUR 2500 + VAT)	
Single Market Report (EUR 2500 + VAT)	
Business Study (EUR 2500 + VAT)	

### Key:

\* A single user subscription package is solely intended for one person

\*\* A corporate, multi-user subscription package can be distributed throughout an organization

## Subscriber details

Name:

Company (write "private" if not applicable):

Address line 1:

Address line 2:

Address line 3:

ZIP/post code:

Country:

Telephone:

E-mail:

VAT/TVA/MWST no. (for EU-based companies only):

Adding value to your renewable energy business

**MAKE**  
CONSULTING

### MAKE Consulting

#### Headquarters

Bushøjvænget 129  
DK-8270 Højbjerg  
Denmark

T: +45 7026 6628

#### USA office

117 N. Jefferson Street, Suite 400  
Chicago, IL 60661  
USA

T: +1 312-441-9590

#### USA office

225 Franklin Street, 26th Floor  
Boston, MA 02110  
USA

T: +1 978 448 3186

#### P.R. China office

The Exchange Tower, 2916  
No. 189 Nanjing Road, Tianjin 300051  
P.R. China

T: +86 22 2318 5066

info@make-consulting.com  
www.make-consulting.com