



# Wind Power Development Strategies in Europe, 2008–2020

November 2008

## Study Highlights:

### Strategy Profiles

- European utilities
- European wind IPPs and Developers
- Offshore wind IPPs
- European market share analysis and value chain positioning

### Wind Power Development Opportunities

- Opportunities in greenfield, scaling, and consolidating markets

### Market Forecasts through 2020

- Wind power capacity market forecasts by country (multiple scenarios)
- Trends and forecasts in wind farm size
- Offshore market potential

### Strategy Profiles of European Utilities

- Strategy focus based on market maturity
- Pipeline analysis
- Project portfolio evaluation

### Competitive Analysis of IPPs and Developers

- Strategy focus based on market maturity
- Pipeline analysis
- Project portfolio evaluation

### Wind Power Market Environment Rankings

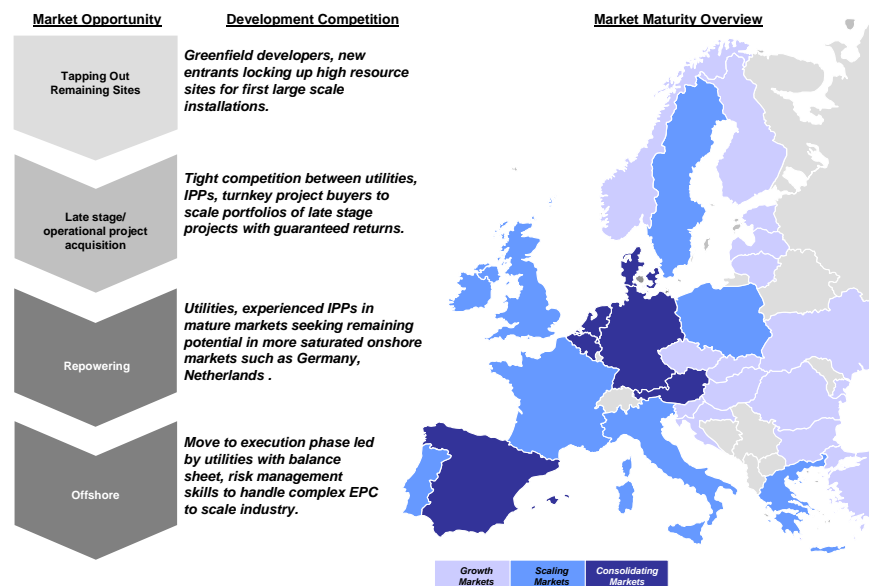
30 wind markets across Europe are ranked by the following:

- Wind resources
- Regulatory mechanisms
- Site approval
- Grid connection
- Competition

Wind energy has moved firmly into the mainstream of Europe's generation mix as the leading source of new generation capacity in 2007, surpassing all other technologies including thermal with nearly 8GW installed. EER's new study, **Wind Power Development Strategies in Europe, 2008–2020**, analyzes trends in market growth, competitive shifts on the value chain, and emerging investment opportunities. Key findings of the study include:

- **Europe remains the industry's single largest regional market opportunity.** Turning in steady 5% compound annual market growth between 2008-2020, from 7.8 GW to 15.2 GW added, the European wind energy market is currently worth over €12 billion annually in new installations, surpassing both North America and Asia Pacific.
- **Utility-driven value chain consolidation continues.** Consistent EU-wide political support for renewables urges utilities to take strong positions in wind energy, which continues to provide opportunities for developer project and pipeline sales. At the same time, utilities' moving upstream to lock up capacity threatens the IPP model that has flourished over the past five years.
- **Independent players seeking long term positioning.** Wind's move into utility mainstream power generation is forcing developers and IPPs to carve out geographic or technical niches on the value chain to remain competitive in the long term. While risk-averse investment players are divesting from their turnkey-developed assets, stronger industrial-backed players from complementary infrastructure industries are capturing remaining opportunities.
- **Industry rapidly moving to tap out remaining potential, optimize existing assets.** Building on the experiences of Western Europe, Eastern Europe is seeing faster market entry and ramp up with utilities and experienced IPPs taking early positions. While these firms move East to continue growing their pipelines, they are increasingly focusing on optimizing turbine procurement, O&M capabilities, and integrating wind plant into the portfolio as a long term contributor to the generation mix.

### Sample Exhibit: Europe Market Opportunity and Competitive Landscape Overview



Source: Emerging Energy Research

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