



Wind Power Development Strategies in Europe, 2007–2015

June 2007

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 2015

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

Competitive Analysis

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

Wind Power Market Environment Rankings

- Policy evolution
- Site availability and competitive barriers

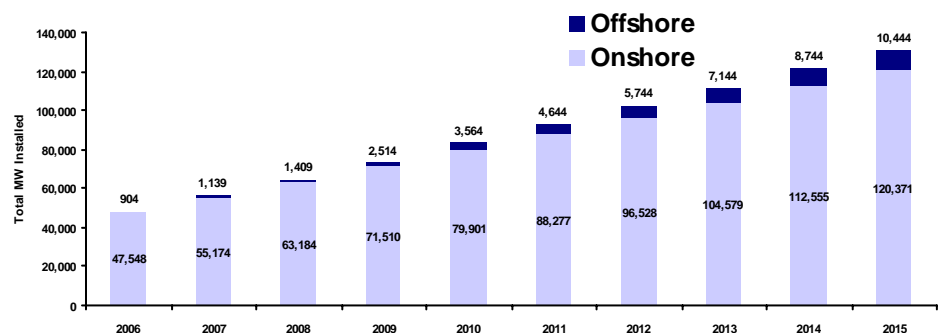
Wind power in Europe will continue to see steady growth over the next five years and remain an anchor for the industry amidst rapid, but more volatile, global wind power expansion. With its many individual wind power markets operating at different levels of market maturity, Europe presents a challenging and evolving competitive environment.

Wind Power Development Strategies in Europe 2007-2015 is the most in-depth market study available on Europe's wind power development market. EER's new study analyzes the strategies of key players competing in these booming, yet volatile wind markets. This is the third annual study to date by EER on Europe's wind markets, and is widely considered the most in-depth and authoritative market study available on European wind market development.

Trends covered in EER's market study include:

- **Emergence of new growth markets** is shifting the strategy focus of top European development players, looking East and offshore.
- **Renewable policy shifts** are shaping development environments throughout Europe, with incentive revisions impacting the wind project business model.
- **Utility strategies** are evolving towards greater pan-European competition as mega utilities comply with renewables obligations and others look to build competitive advantage.
- **Expanding IPPs** are devising acquisition strategies and moving upstream on the value chain to capture early phase opportunities.
- **Developers** are moving to new markets with a new set of local players while consolidating in traditional leading countries Germany and Spain.
- **M&A deals** are climbing into the billions for top wind portfolios, and competition is rife for teams, assets and pipelines.
- **Foreign entrants becoming more active** are on the prowl for acquisitions to gain a foothold in remaining European growth markets.

Sample Exhibit: European Wind Market Forecasts – Base Case Scenario (Total MW Installed)



Source: Emerging Energy Research

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