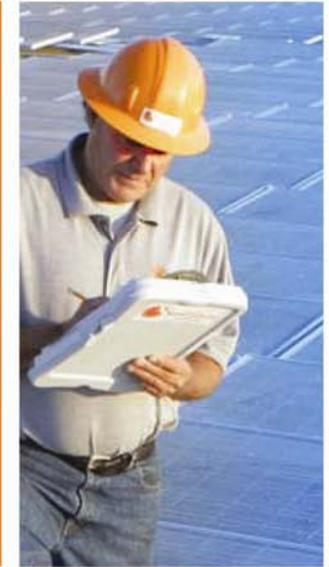




SIMPLIFYING SOLAR



# Solar Market Overview and Drivers



Colin Murchie

Director, Government Affairs

# Who?



# SunEdison's Perspective – Our Systems



# SunEdison's Perspective – Our Services



- Our fully managed service includes:

- Program design
- Financing
- Design
- Construction
- REC certification & sales
- Rebate processing
- Promotional support
- 24/7 monitoring & verification
- O&M



# SunEdison's Perspective

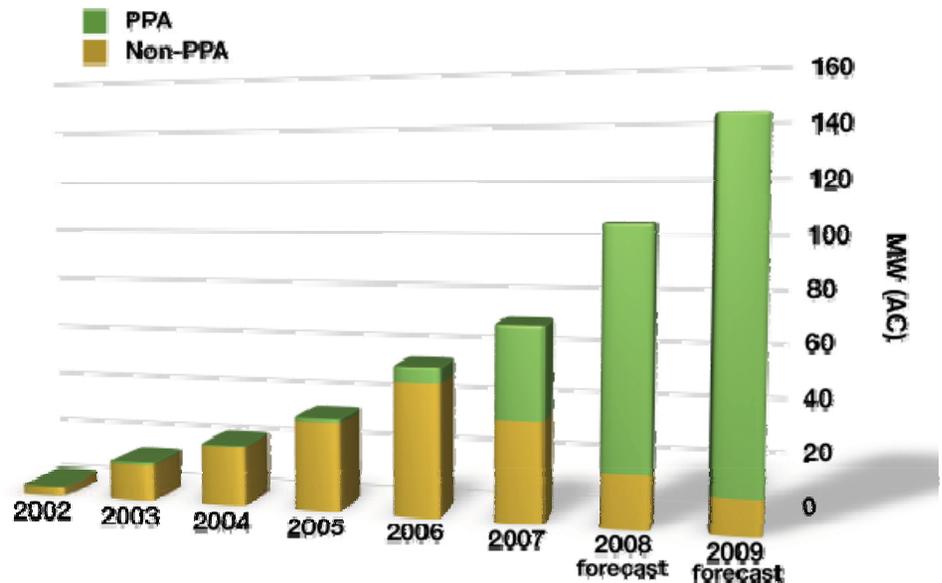


- North America's largest solar energy services provider
  - \$2+ billion in supply contracts
  - Experience with 41 module types
  - 280+ commercial systems installed
  - 70+ MW under management
- Operating across a global marketplace
  - 400 employees
  - 11 U.S. offices
  - Offices in Canada, Spain, Italy
  - ... and expanding quickly

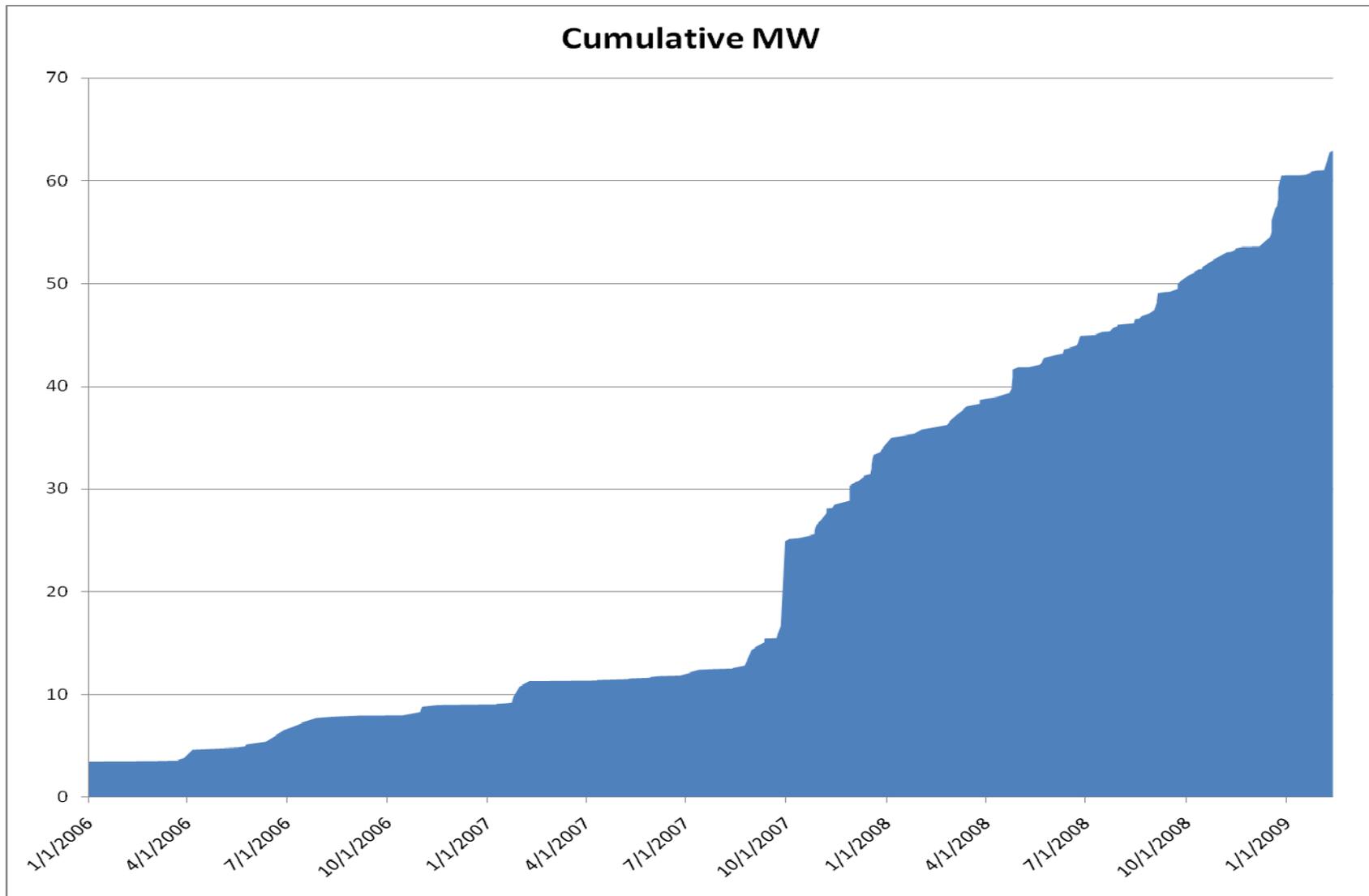
# SunEdison's Perspective



- SunEdison was 1<sup>st</sup> to offer a commercially-scalable Solar Power & Services Agreement (solar PPA)
- Since then, businesses, governments, and utilities have realized that PPAs provide the
  - lowest risk
  - lowest hassle
  - lowest cost
- In 2009, PPAs will be “standard way that American businesses pay for onsite green power”



# SunEdison's Perspective



# US Solar Markets



Materials

Cells

Modules

Systems

Finance

O&M

SunEdison

SunPower

Evergreen Solar

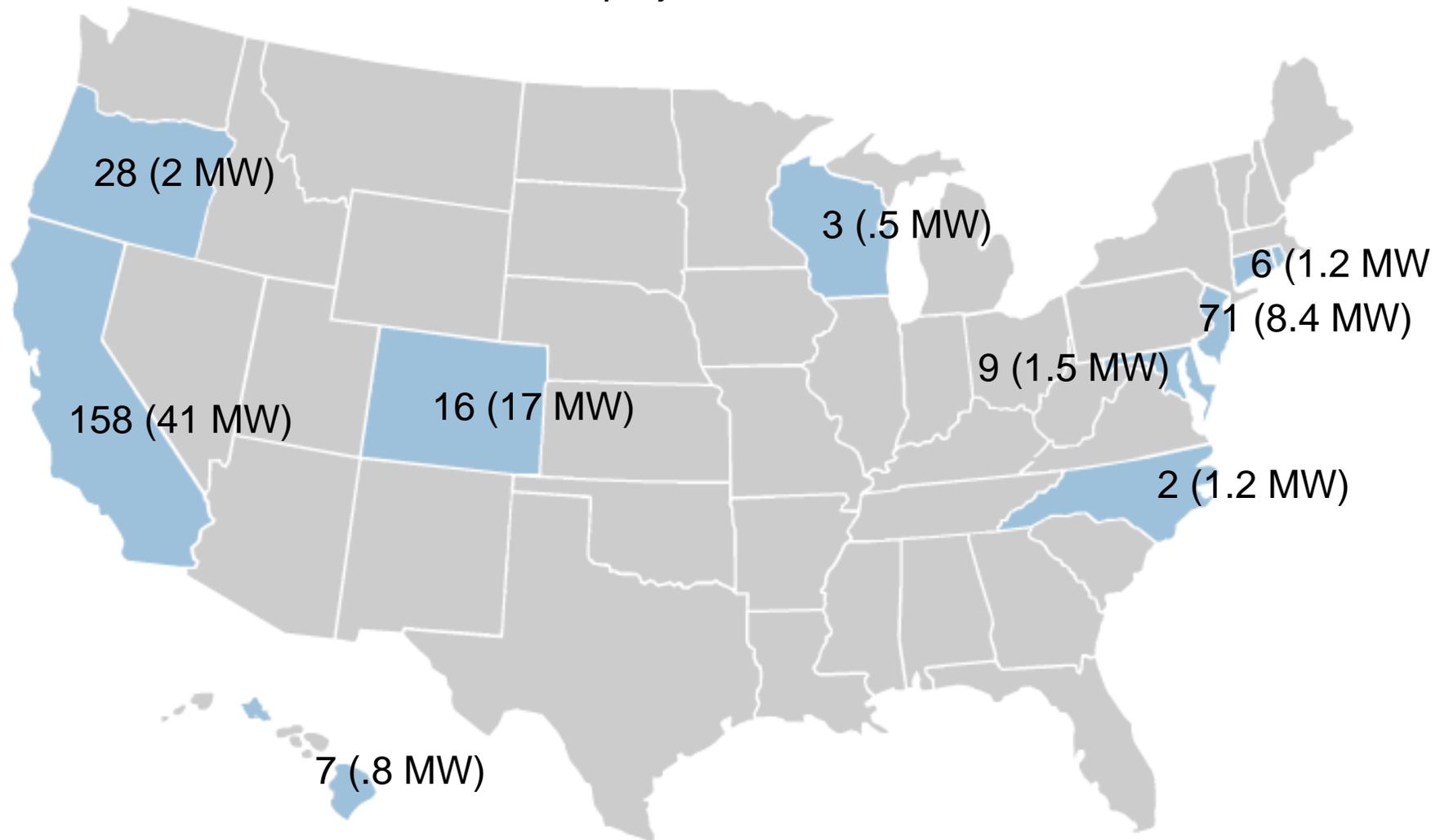
MMA Renewable Ventures

GRO Solar

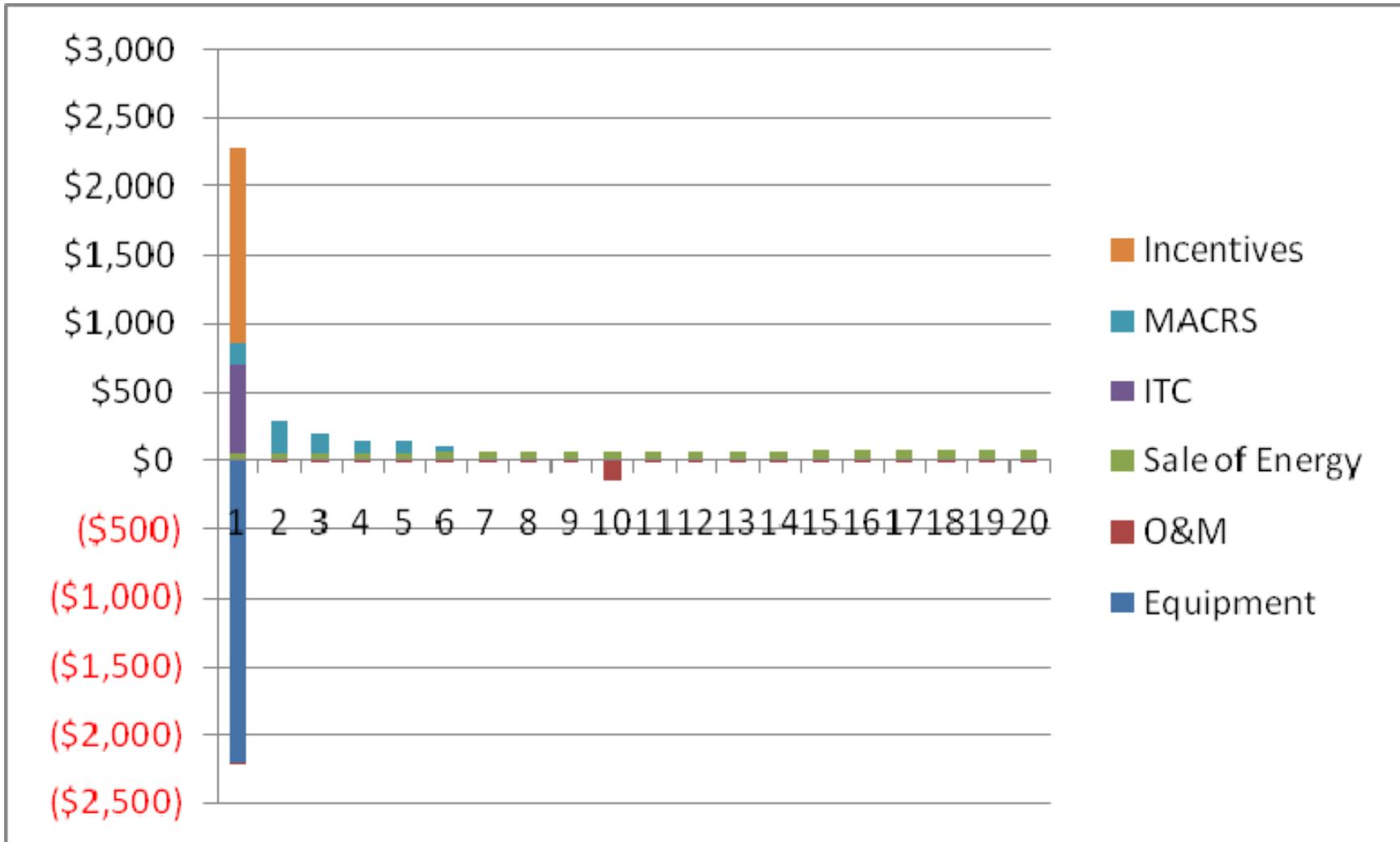
# US Solar MarketS



Total 304 projects / 83 MW



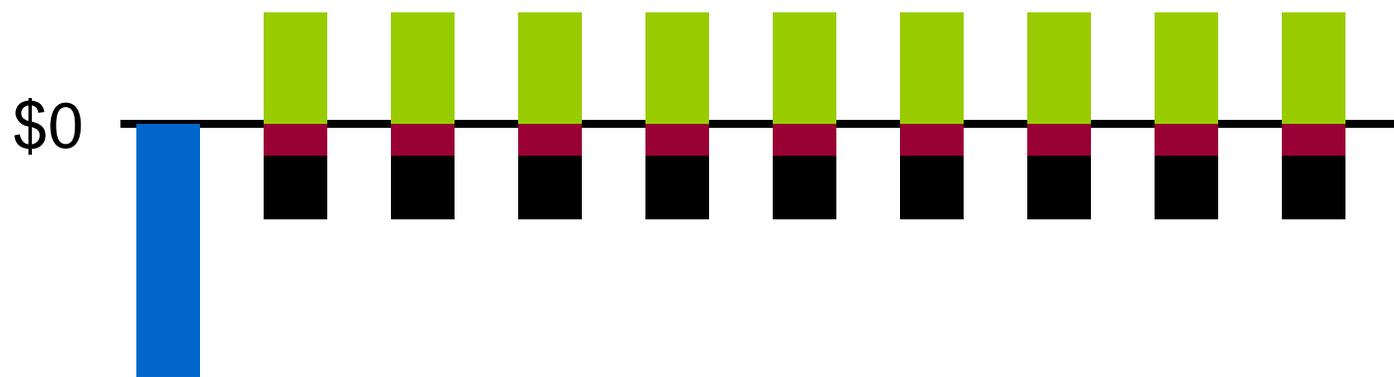
# Making Money From Solar



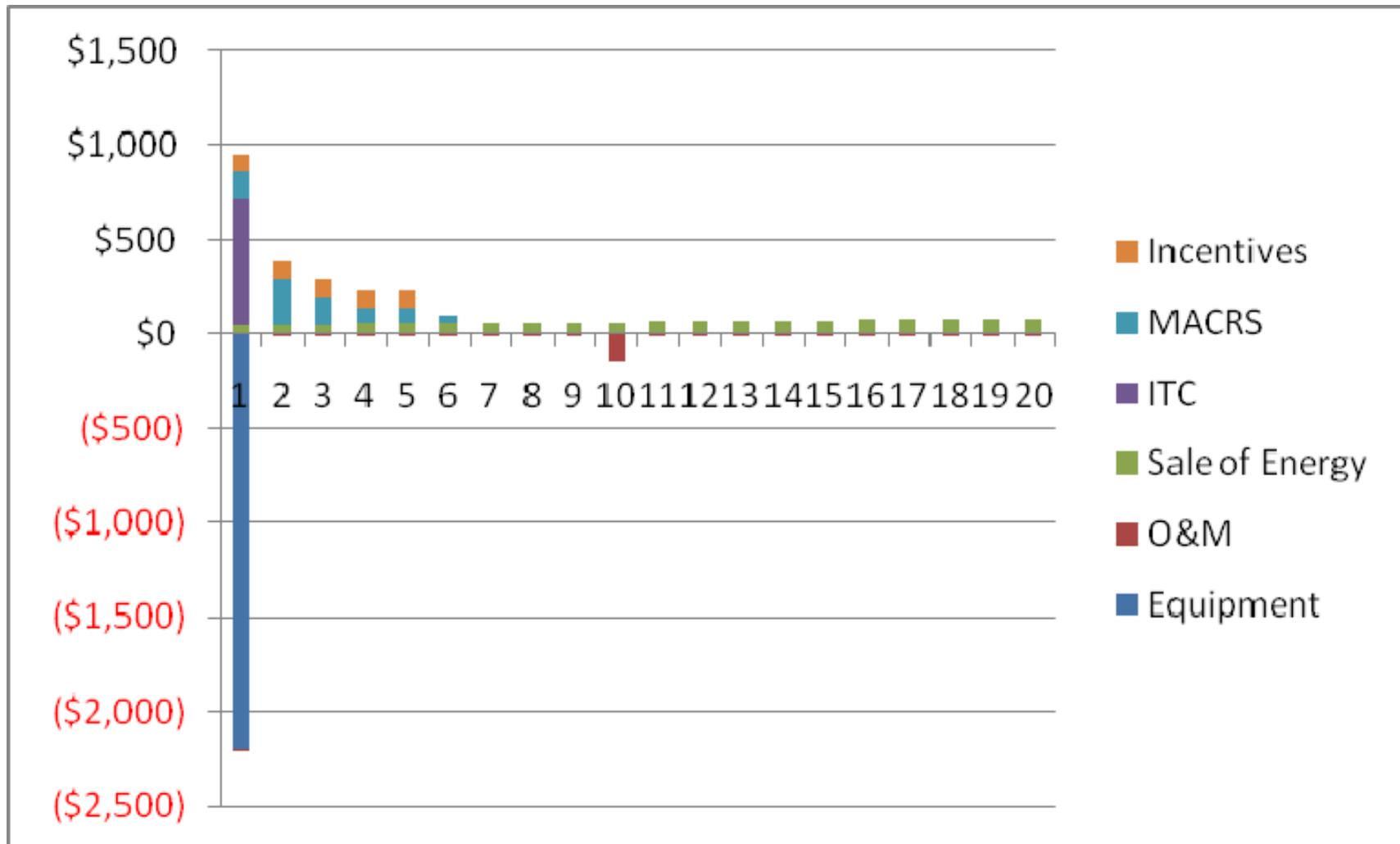
# Making Money From Fossil Plants



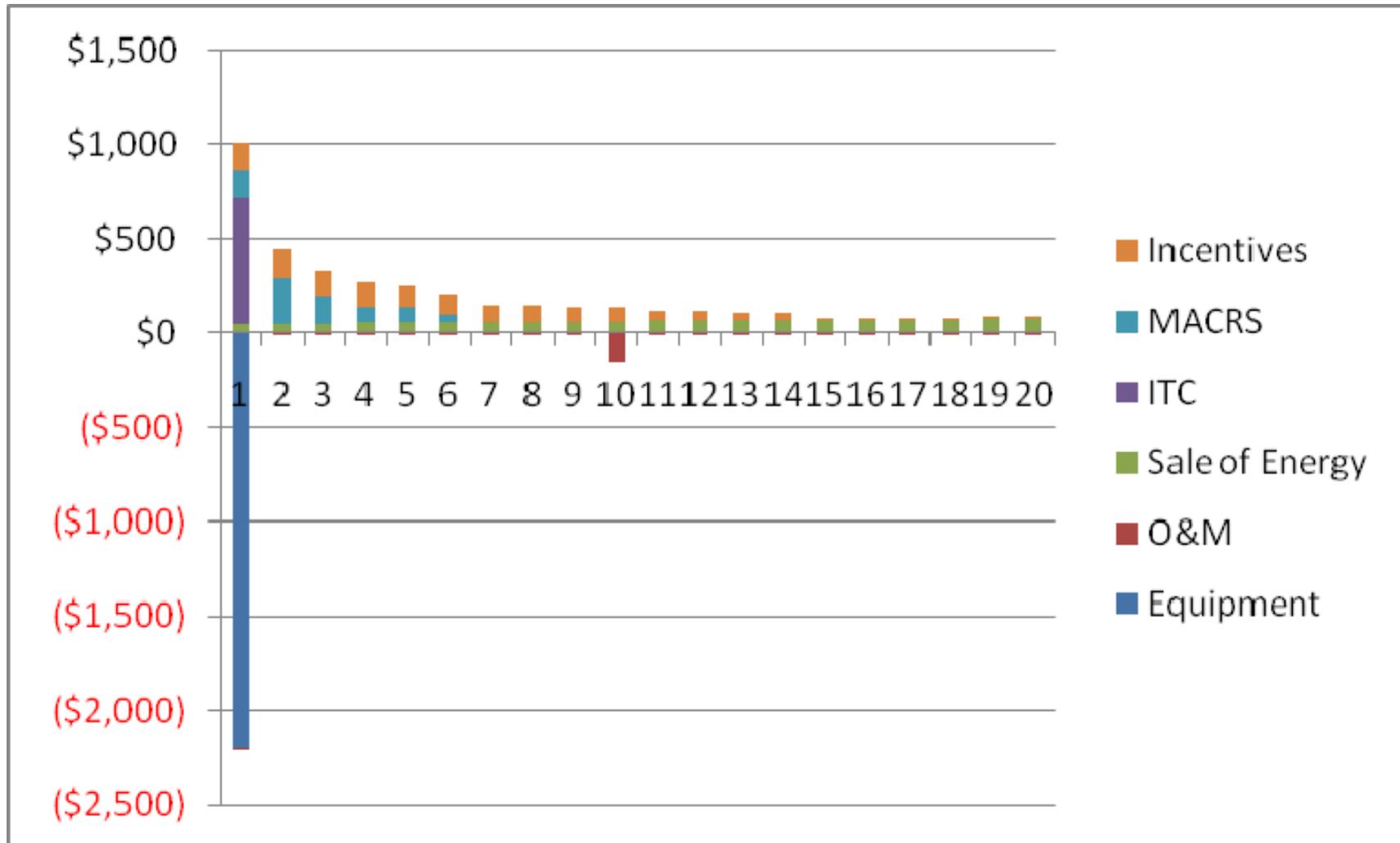
-  Sale of Energy
-  O&M
-  Fuel
-  Equipment



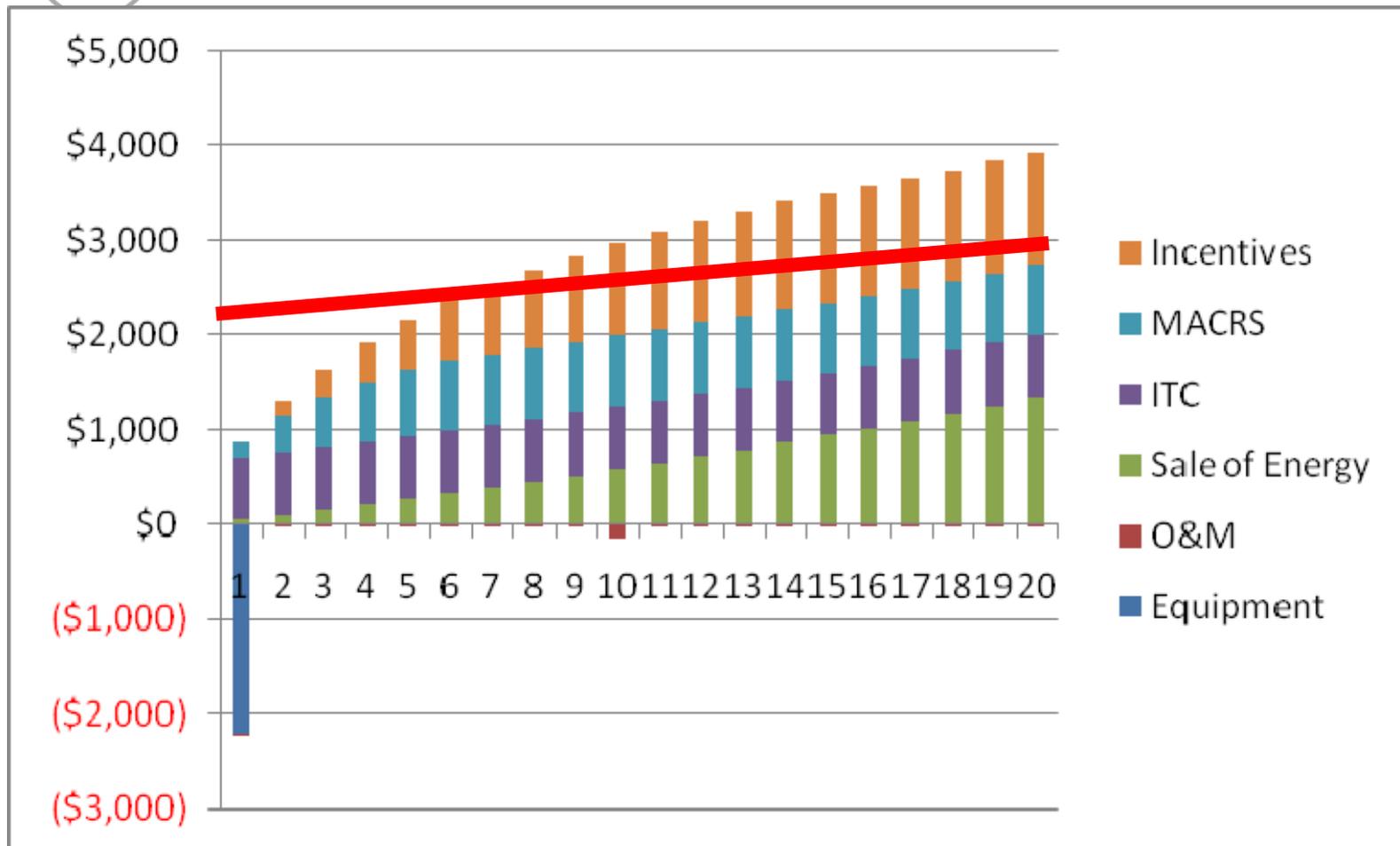
# Making Money From Solar



# Making Money From Solar



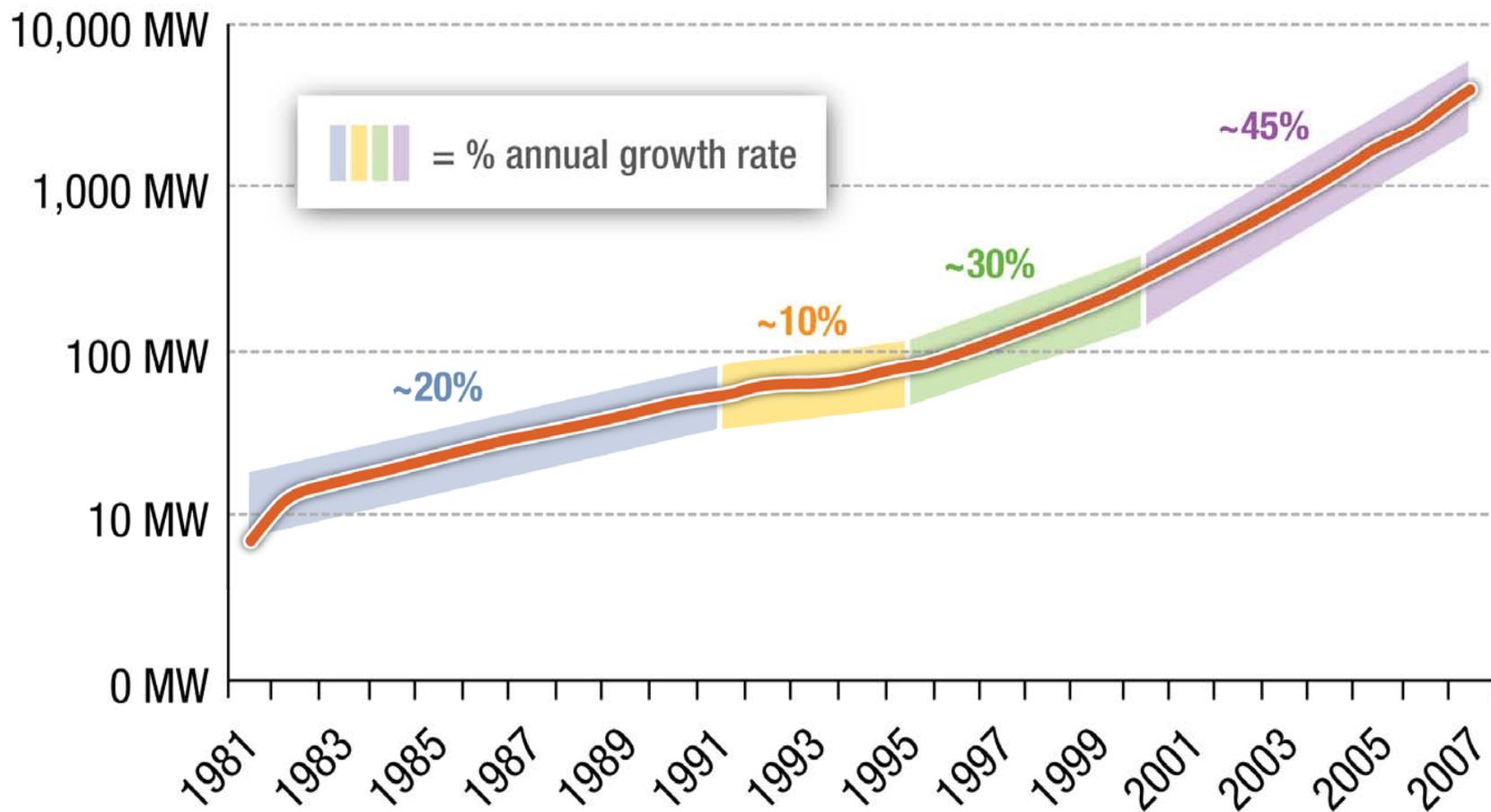
# Making Money From Solar



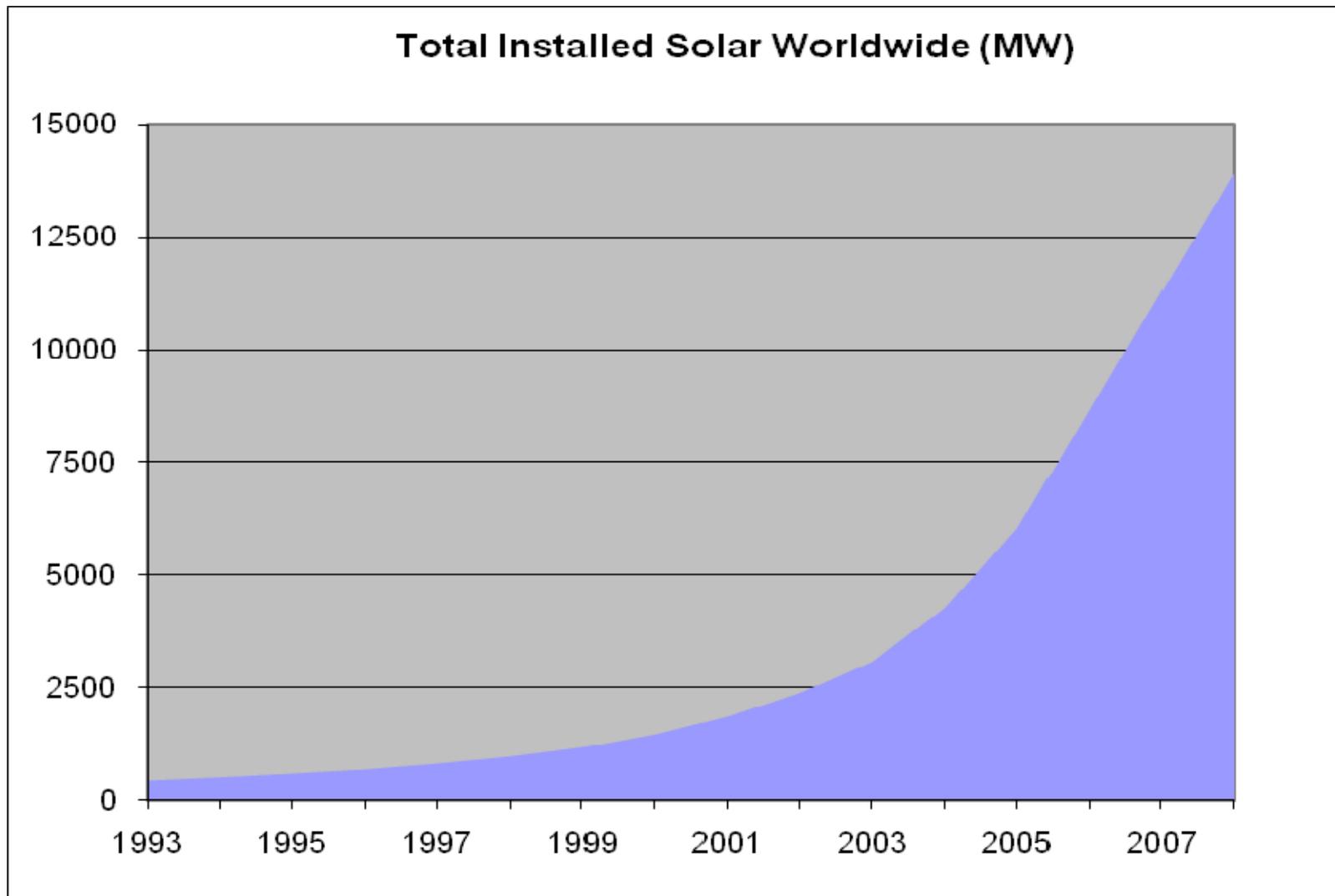
# Market Growth – Global Perspective



## Annual Global Installations



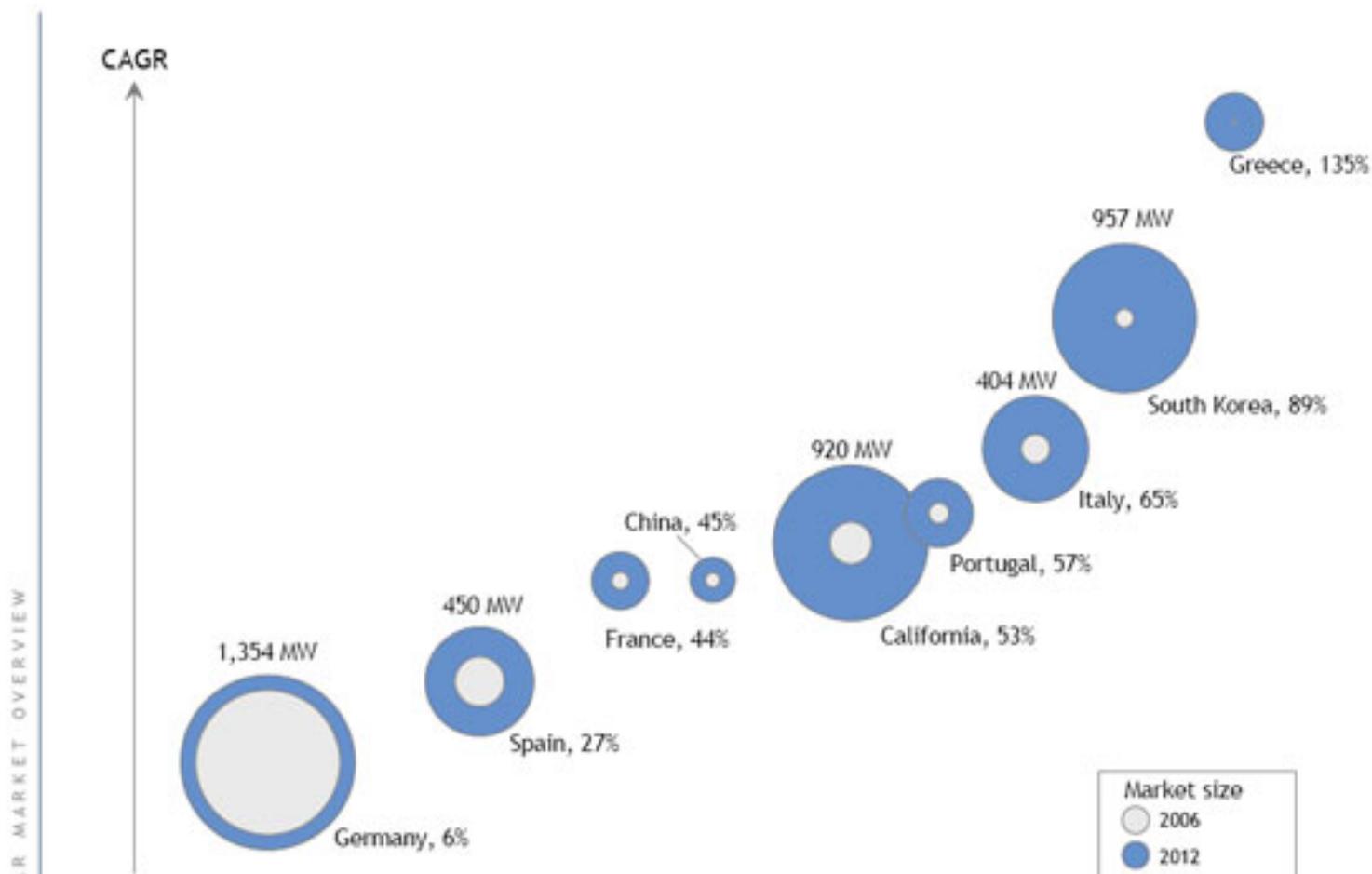
# Market Growth – Global Perspective



# Market Growth – Global Perspective



## The evolution of the solar market worldwide

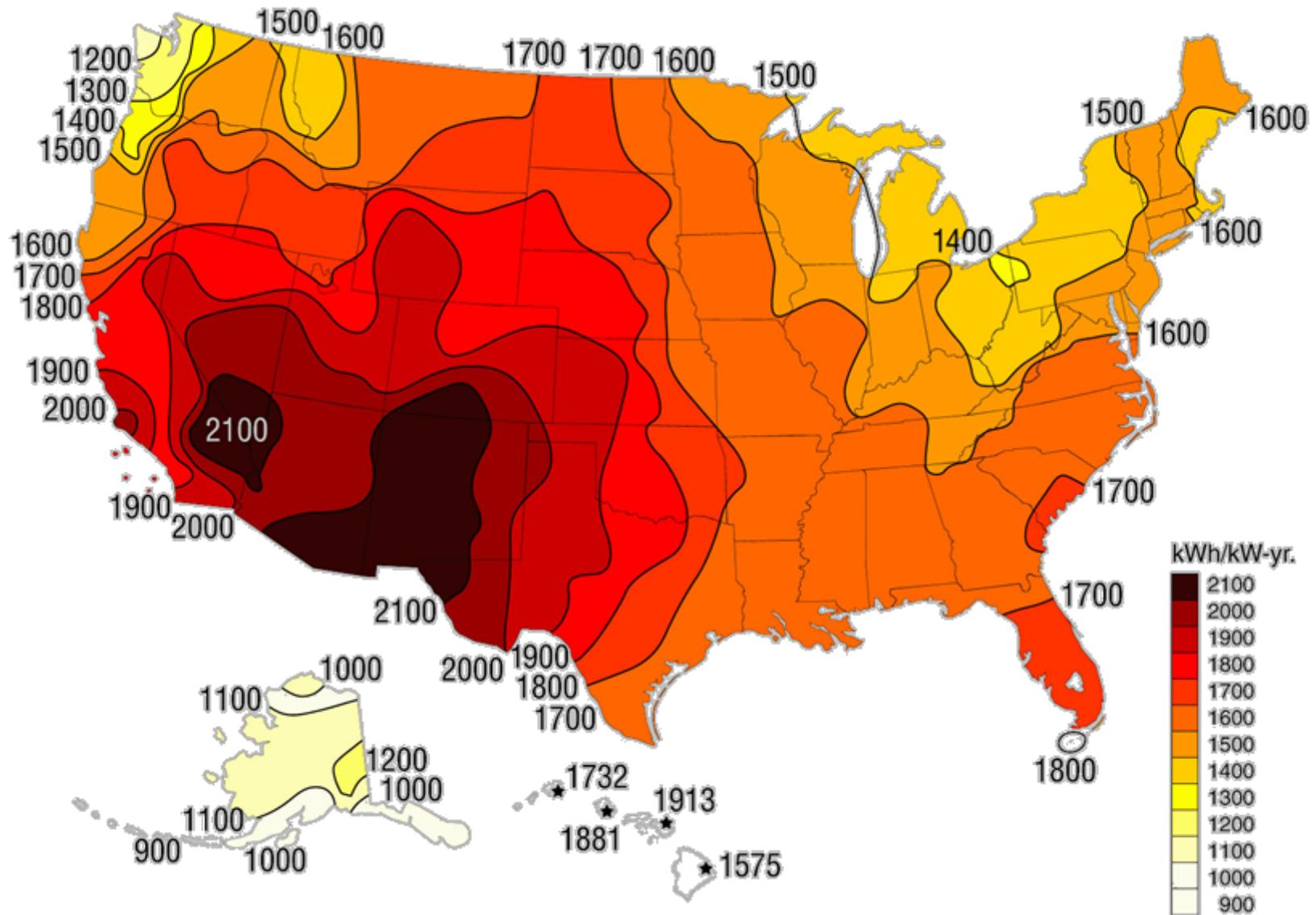


SOLAR MARKET OVERVIEW

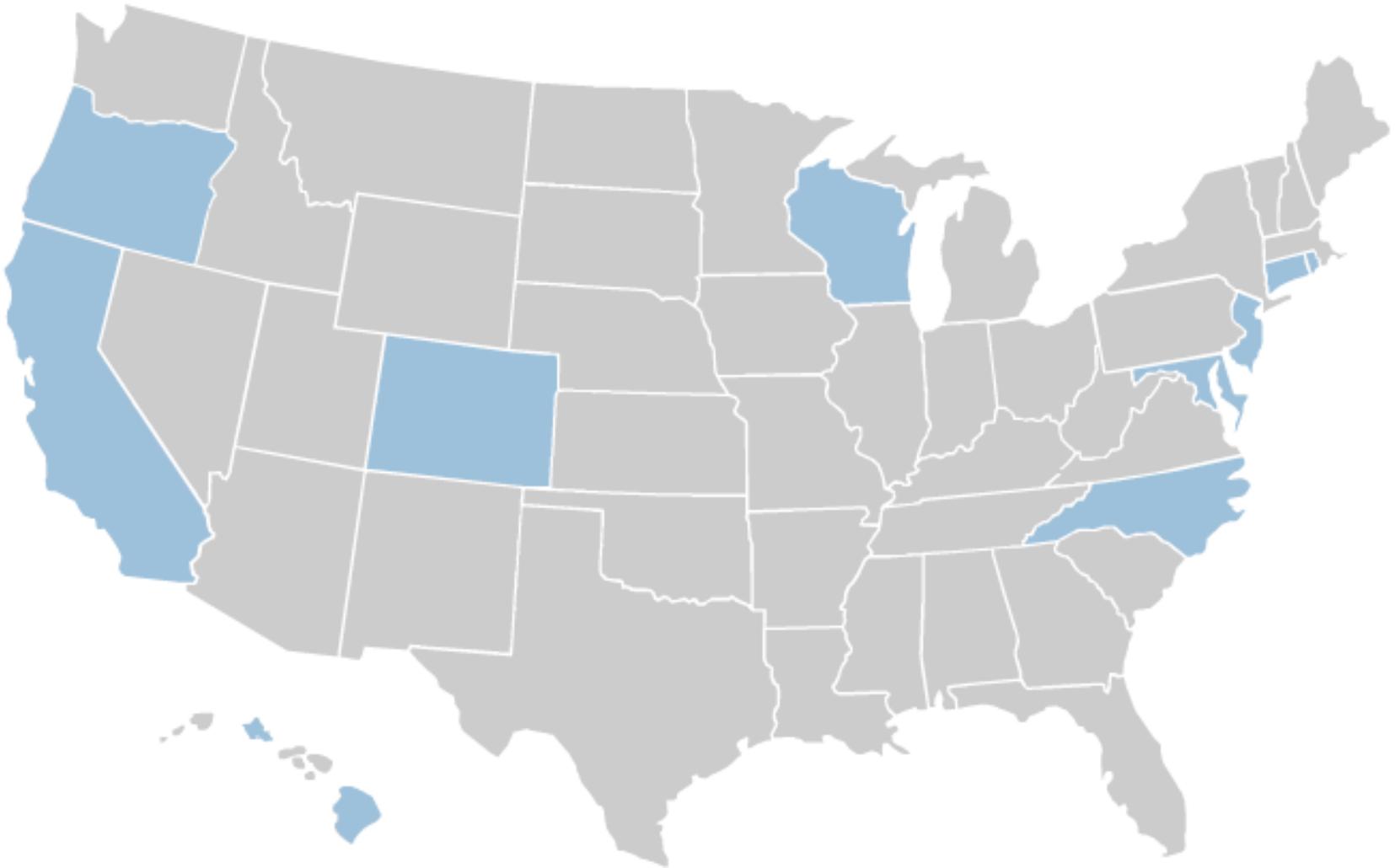
JPMorgan

Source: Solarbuzz, March 2007  
Navigant, PV News, China REDP Report

# Market Growth – US Perspective

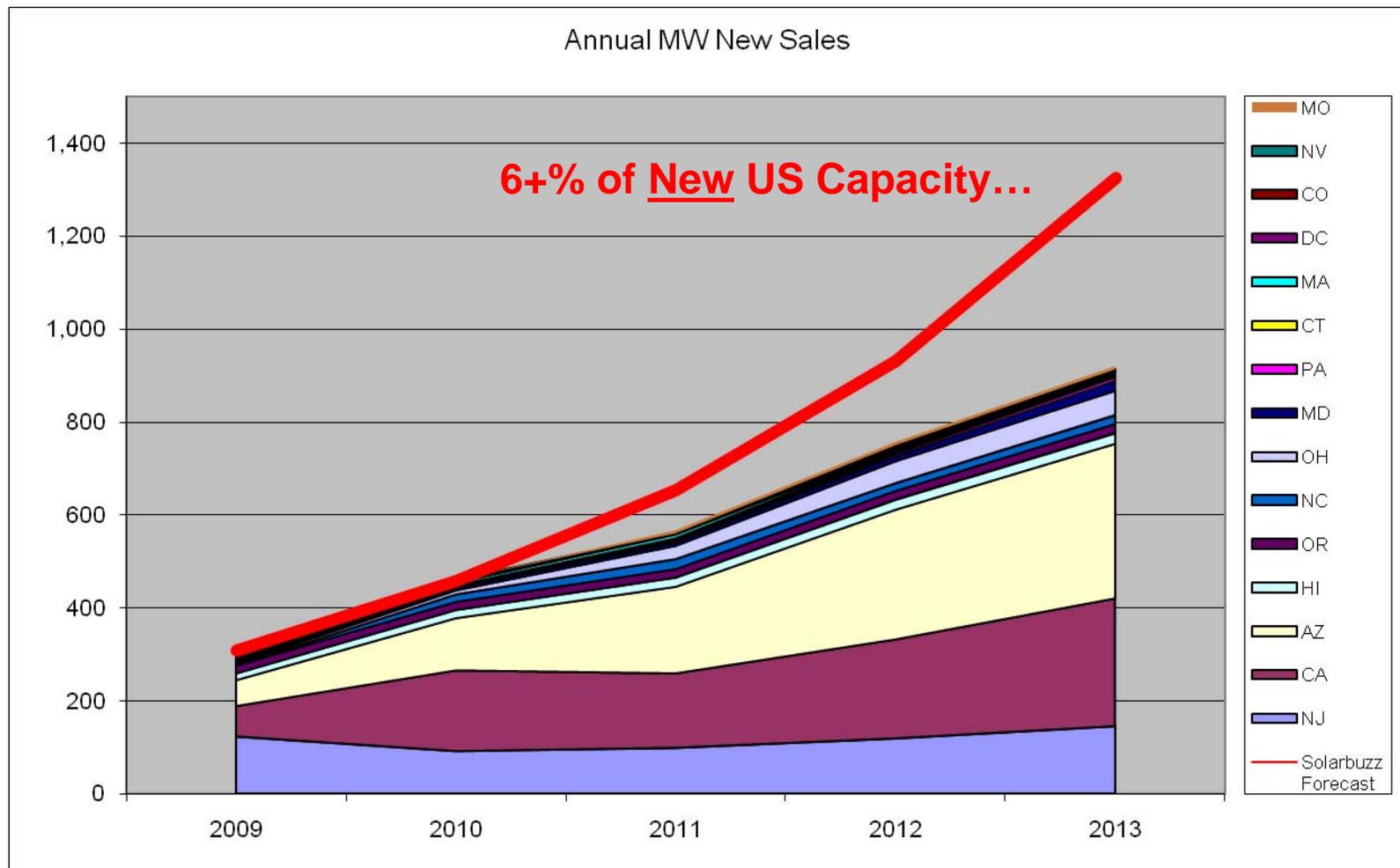


# Market Growth – US Perspective

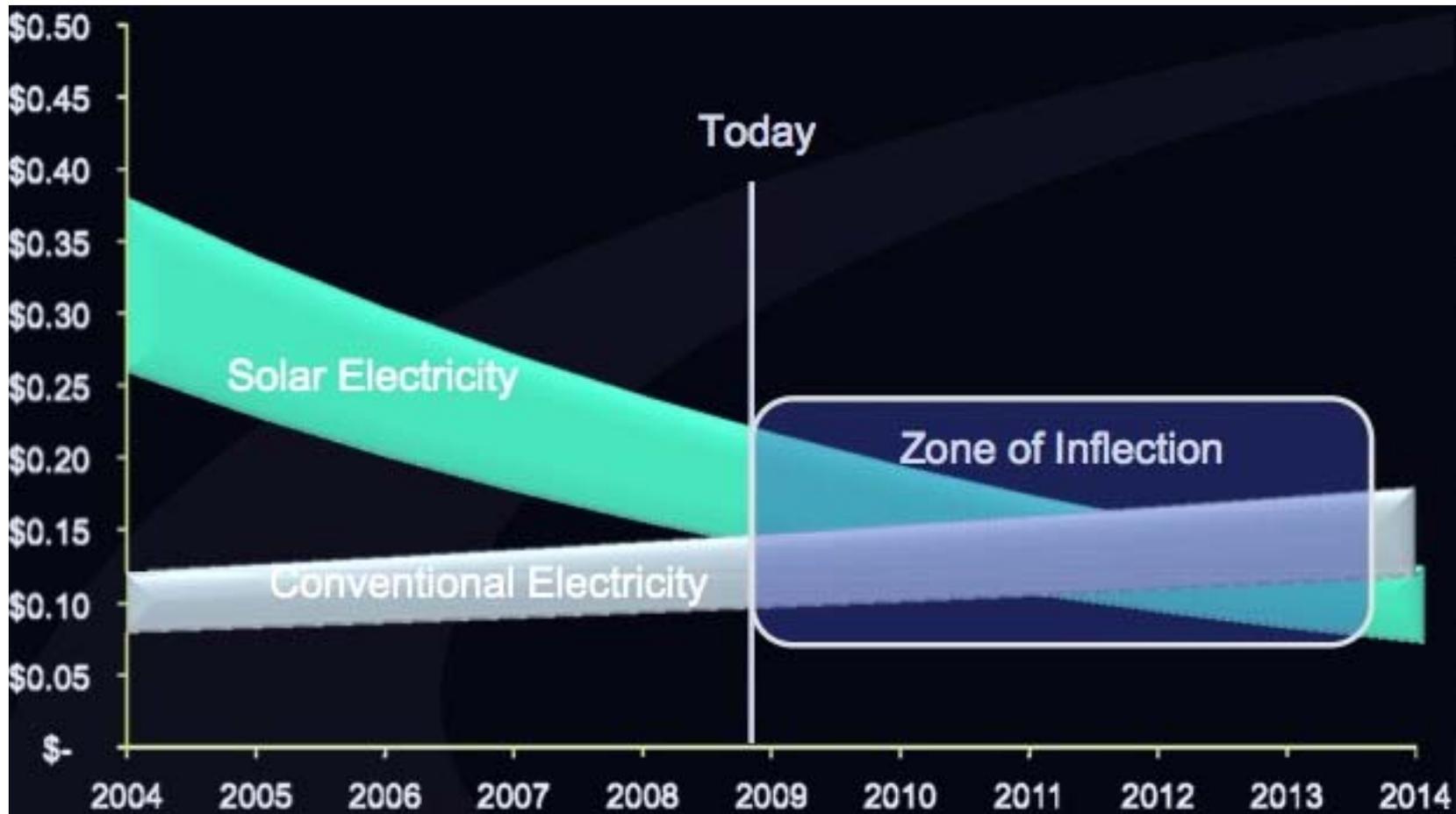




# Market Growth – US Perspective



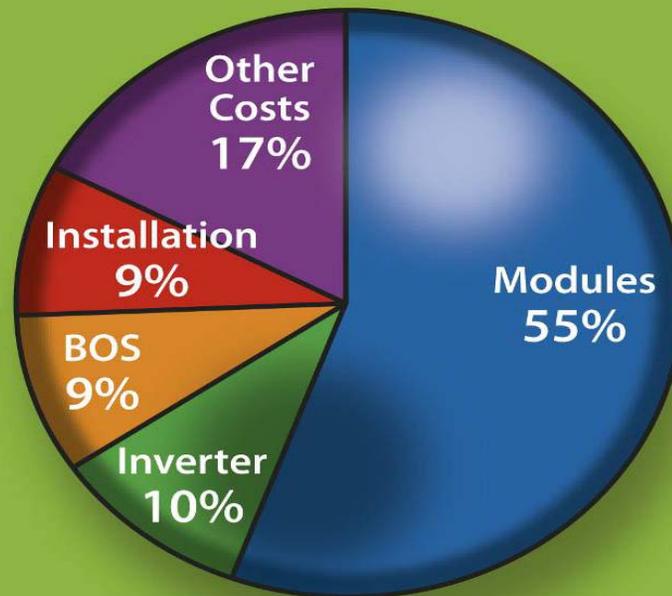
# Market Growth – US Perspective



# Market Growth – US Perspective



2005  
Commercial PV System  
Installed Cost  
(Total: \$6.29/Wp)



# Policy Requirements



- **Emplace and Operate Our Systems (Risk)**
  - “Interconnection”
  - “Freeing the Grid” [Newenergychoices.org](http://Newenergychoices.org) / [irecusa.org](http://irecusa.org) / FERC
- **Get Paid For The Energy (Risk / Reward)**
  - “Net Metering” (commercial nonexport)
  - Post – Netting Paradigms – [www.smallisprofitable.org](http://www.smallisprofitable.org)
- **Make up the “Delta” (Reward)**
  - State Self – Purchase PPAs
  - RPS (w / solar or distributed carveout,) PBI, Tax

## Policy Nonrequirements



- Workforce Training
- Marketing Support
- Financing
- Pilots and Demonstrations

# What Can We Do For You?



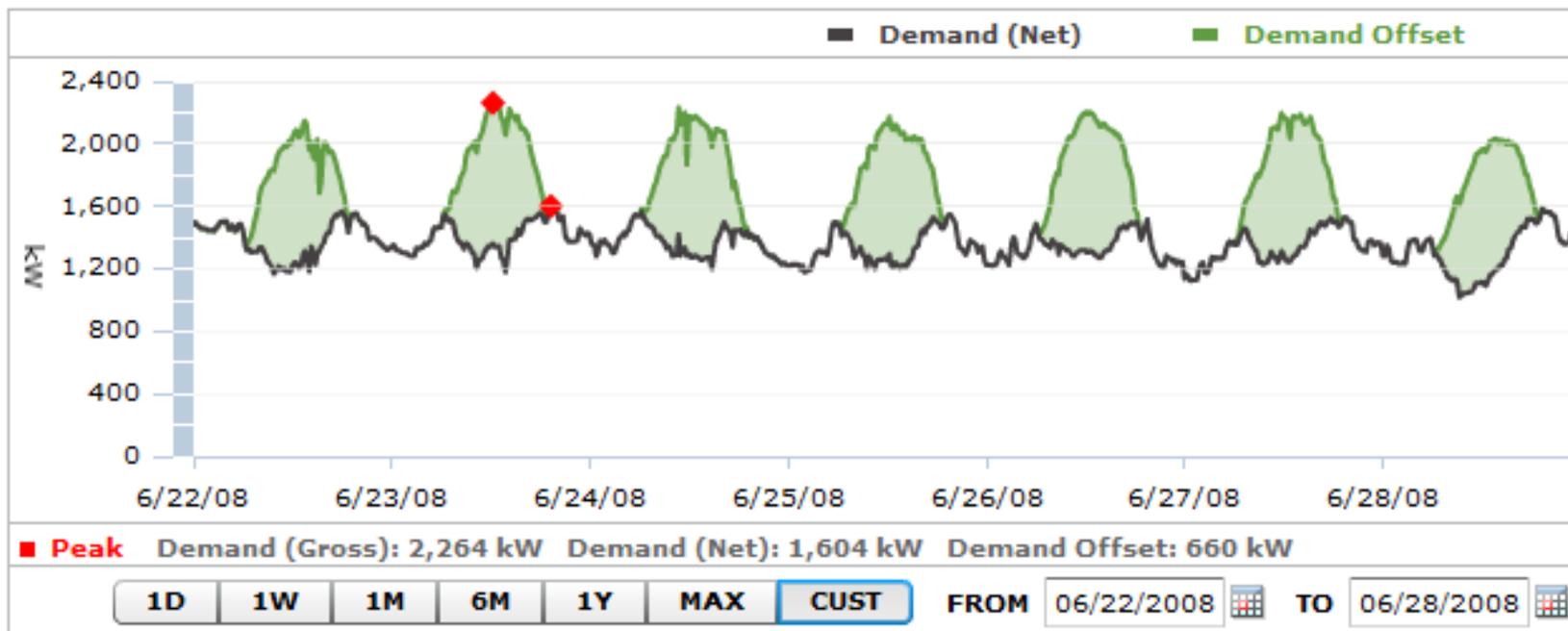
## Data Analysis

Solar Demand Offset



Export

Options...



# What Can We Do For You?



**SunEdison Operated:**  
**Privately Owned:**

## Outage Rates

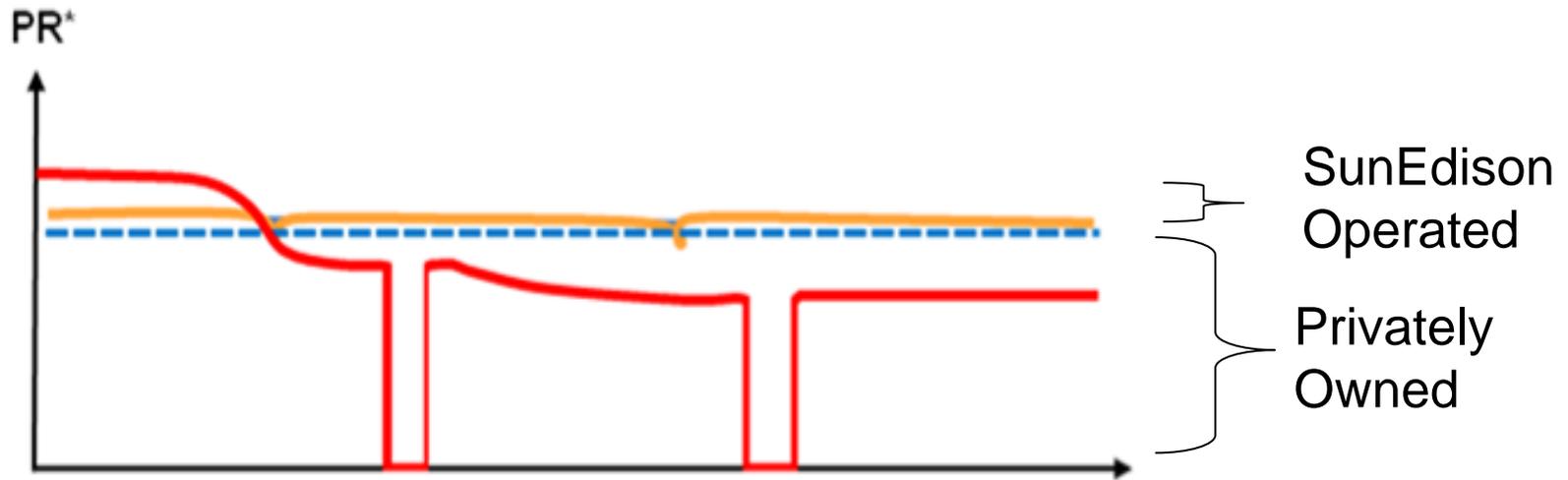
1.6 - 2%

8.0 - 17%

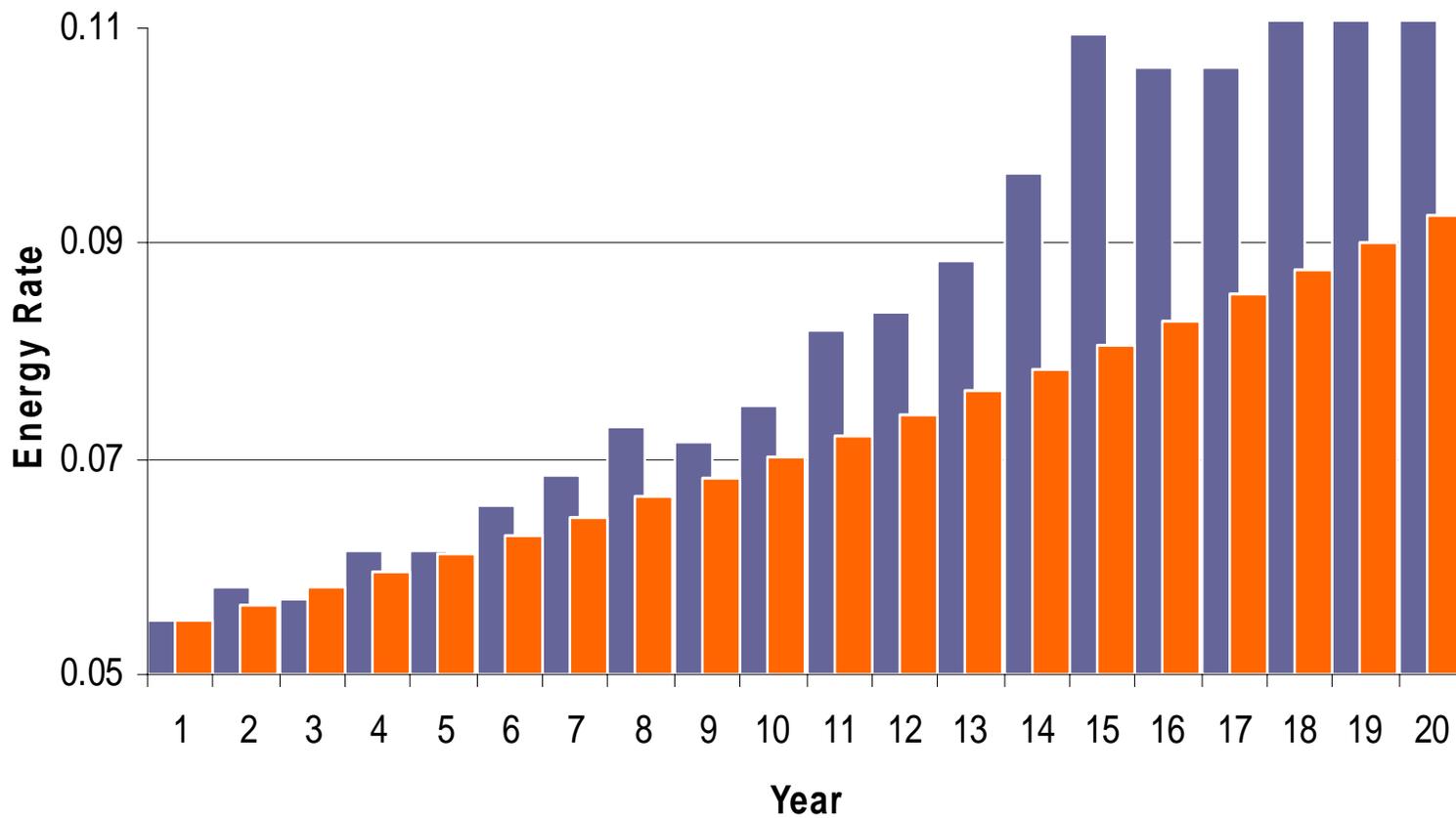
## Performance

102 - 107%

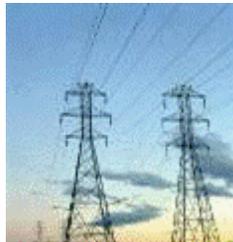
53 - 90%



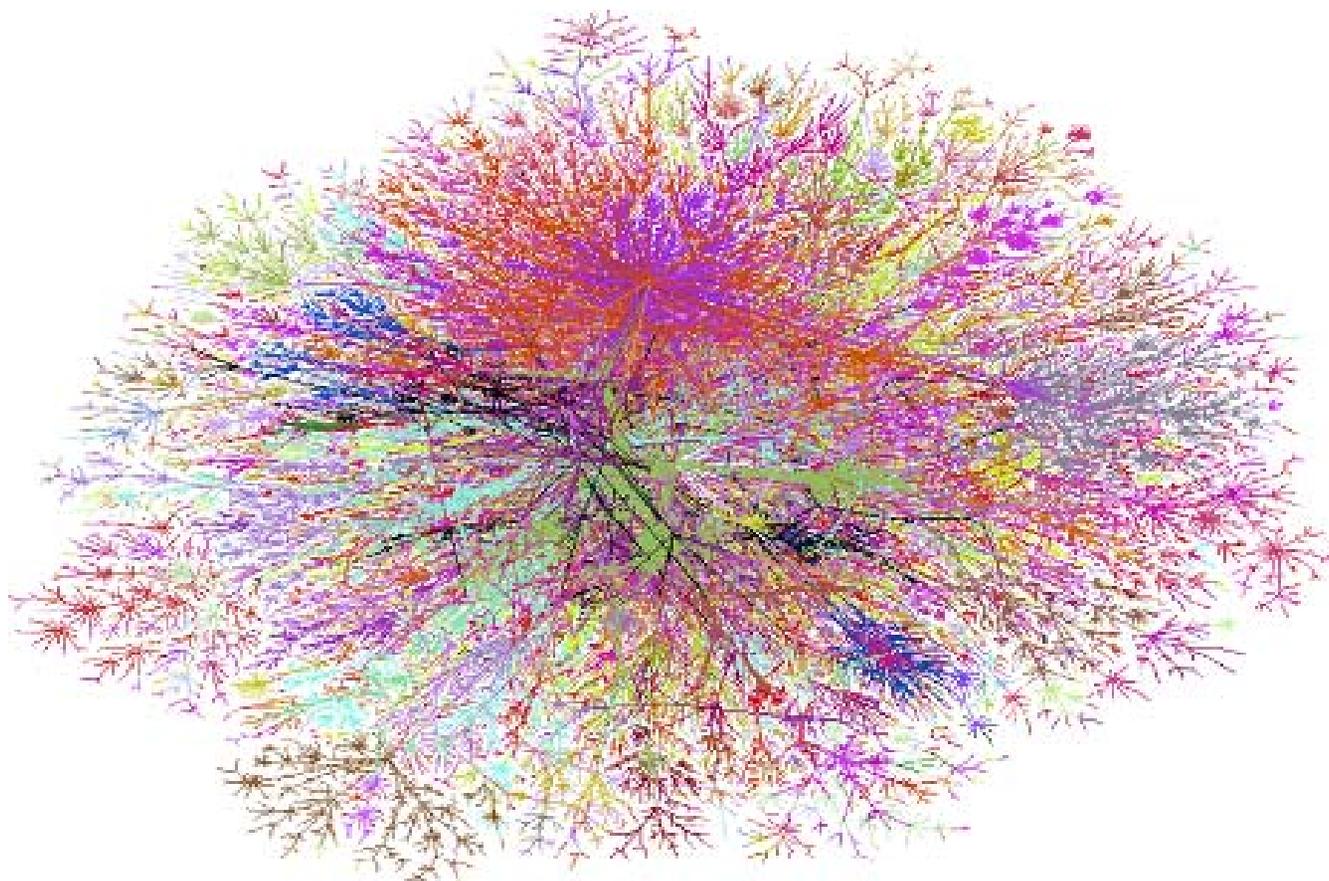
# What Can We Do For You?



# What Can We Do For You?



# What Can We Do For You?



## What Can We Do For You - Stimulus



- **Commercial Scale – Buy Your Own**
  - Standard RFP
  - Cash Sale, PPA, or Prepaid
  - “Choose Your Own Facility”
    - Schools
    - Streamlined Procurement Agencies

Thanks! Questions?



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**(443) – 909 – 7275**