emerging energy research | *New Market Study*

Renewable Generation Strategies of Europe's Utilities, 2006–2011

March 2006

Study Highlights:

Strategy Profiles of Europe's Utilities
In-depth analysis of utility renewable generation strategies in the context of their overall generation portfolios, cross-border market strategies, and competitive drivers.

Utilities profiled include:

- DONG/Elsam Energi E2
- EDF
- Edison
- EDP
- Electrabel
- Endesa
- Enel
- E.ON
- Essent
- Fortum
- Iberdrola
- Nuon
- RWE
- ScottishPower
- Scottish & Southern
- Statkraft
- Vattenfall
- Verbund

Generation and Project Data
Up-to-date analysis of utility generation portfolios by technology, investment plans, and project by project status.

- Utility investment plans by renewable technology, including:
  - Wind projects and pipelines
  - Biopower projects and pipelines
  - Wave and tidal pilot projects
  - Solar PV and CSP activities
- Utility by utility generation data including comparative analysis of renewable, nuclear, and thermal capacity

Regulatory and Carbon Policies
Comparative analysis of renewables targets, feed-in and quota policies, and ETS implementation.

- Impact of country-specific carbon and renewables policies on utility strategies
- Utility strategies for addressing carbon allocations
- Impact of deregulation on renewables investment

Competitive Analysis
Analysis of competition amongst utilities in regional markets and Europe-wide, including the role of renewables.

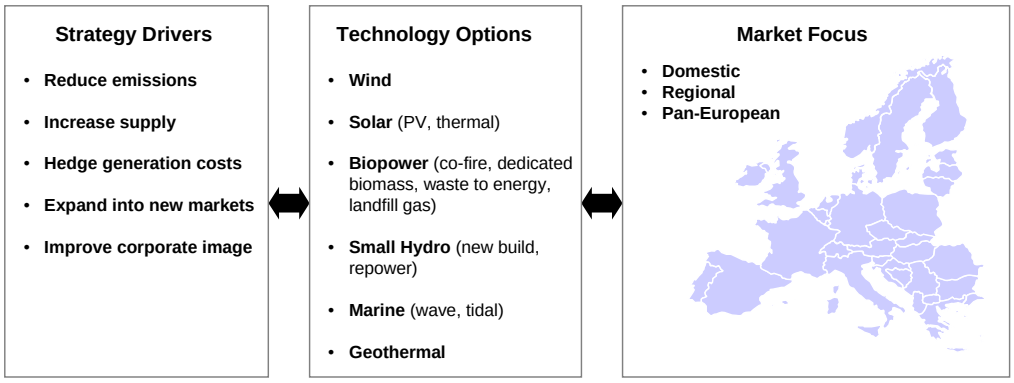
- Renewable M&A activity
- JV and partnerships
- Value chain analysis

Over 270 pages and more than 200 exhibits of comprehensive benchmark analysis with a European focus.

Environmental issues are increasingly driving power generation investments in Europe. Challenged by the EU and Kyoto-driven national policies to produce cleaner power, Europe's utilities are adding renewables to their generation portfolios at a faster pace than ever before. While wind power has been the dominant renewable power source added this decade, utilities are now broadening their search for clean power alternatives to include scalable biopower, small hydro, solar, and ocean power.

But building out renewable generation to meet EU targets is only a small part of the story. In the broader context of electricity deregulation, fuel supply interruptions, skyrocketing energy prices, and industry consolidation, renewable energy strategies have become key to building competitive advantage among Europe's utilities.

Renewable Generation Strategies of Europe's Utilities, 2006–2011, a new study by Emerging Energy Research, carefully analyzes the strategies of Europe's largest utilities in the areas of wind power, biopower, solar PV, solar CSP, wave and tidal energy, small hydro power, and geothermal. The study compares strategy drivers, technology options, and market focus.



Renewables are becoming key components of Europe's utility strategy portfolios. EER's new study details how and why:

- Renewables are evolving as a strategic imperatives for utilities aiming to expand into new generation markets while fulfilling environmental obligations. Which utilities are leveraging renewables experience to enter new markets and broaden their European presence?
- To date, wind has been the most scalable option, with projects reaching up to 160 MW. Which technologies will follow? How far off is tidal and solar CSP? Which utilities have achieved competitive business models in biopower?
- Europe's emissions regulations vary widely by region, giving rise to different approaches among Northern, Southern, and Central European utilities. What are the implications for your business?

Whether Europe's utilities are your customers, your competitors or your suppliers, ***Renewable Generation Strategies of Europe's Utilities, 2005–2010*** provides a wealth of project data, business intelligence, and strategic analysis to help you succeed in renewable energy markets.

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In addition to market studies, Emerging Energy Research offers research advisory services, which provide a continuous stream of business intelligence, competitive analysis and strategic advice. Clients receive detailed Market Forecasts, Strategy Papers, On Point briefings and Analyst access to help them meet a variety of needs within their organization.

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