



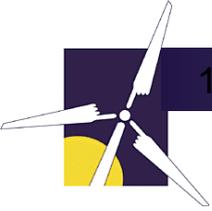
Overview of New England Wind Project Development Activity

NEWEEP Conference

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Jason Gifford

Senior Consultant, Sustainable Energy Advantage, LLC



Sustainable Energy Advantage, LLC

Since 1998, SEA has provided interdisciplinary consulting, analysis and advisory services to both public and private sector clients throughout New England and the nation.

Services

- ***Interdisciplinary consulting & advisory services*** (regional & national)
- ***New England Renewable Energy Market Outlooksm*** (REMO) subscription briefings
- ***New England Eyes & Earssm*** Regulatory, Policy & Legislative Tracking and Analysis Subscription Service

Practice Areas

- ***Power market and public policy analysis, tracking, development & implementation.***
- ***Strategy development.***
- ***Financial analysis & economic feasibility***
- ***Renewable Energy supply & procurement.***
- ***Quantitative analysis and modeling.***
- ***Transaction facilitation, contract development and negotiation support.***
- ***Business infrastructure development.***
- ***Green power product development & pricing***



Overview

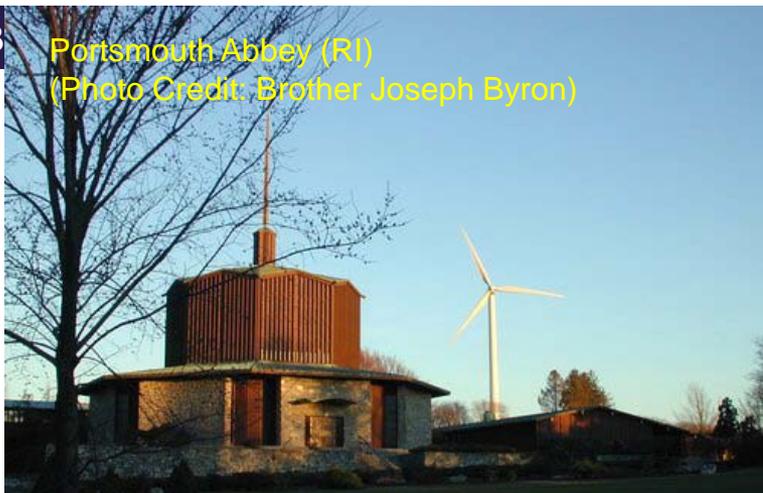
- Wind project development activity in New England
 - By state and project type
 - By state, project size, and development status
- Key factors influencing wind development activity





3

Portsmouth Abbey (RI)
(Photo Credit: Brother Joseph Byron)



Lempster Wind Farm (NH)
(Photo Credit: Iberdrola Renewables)

SUMMARY OF NEW ENGLAND WIND PROJECT DEVELOPMENT ACTIVITY

Kibby Wind (ME)



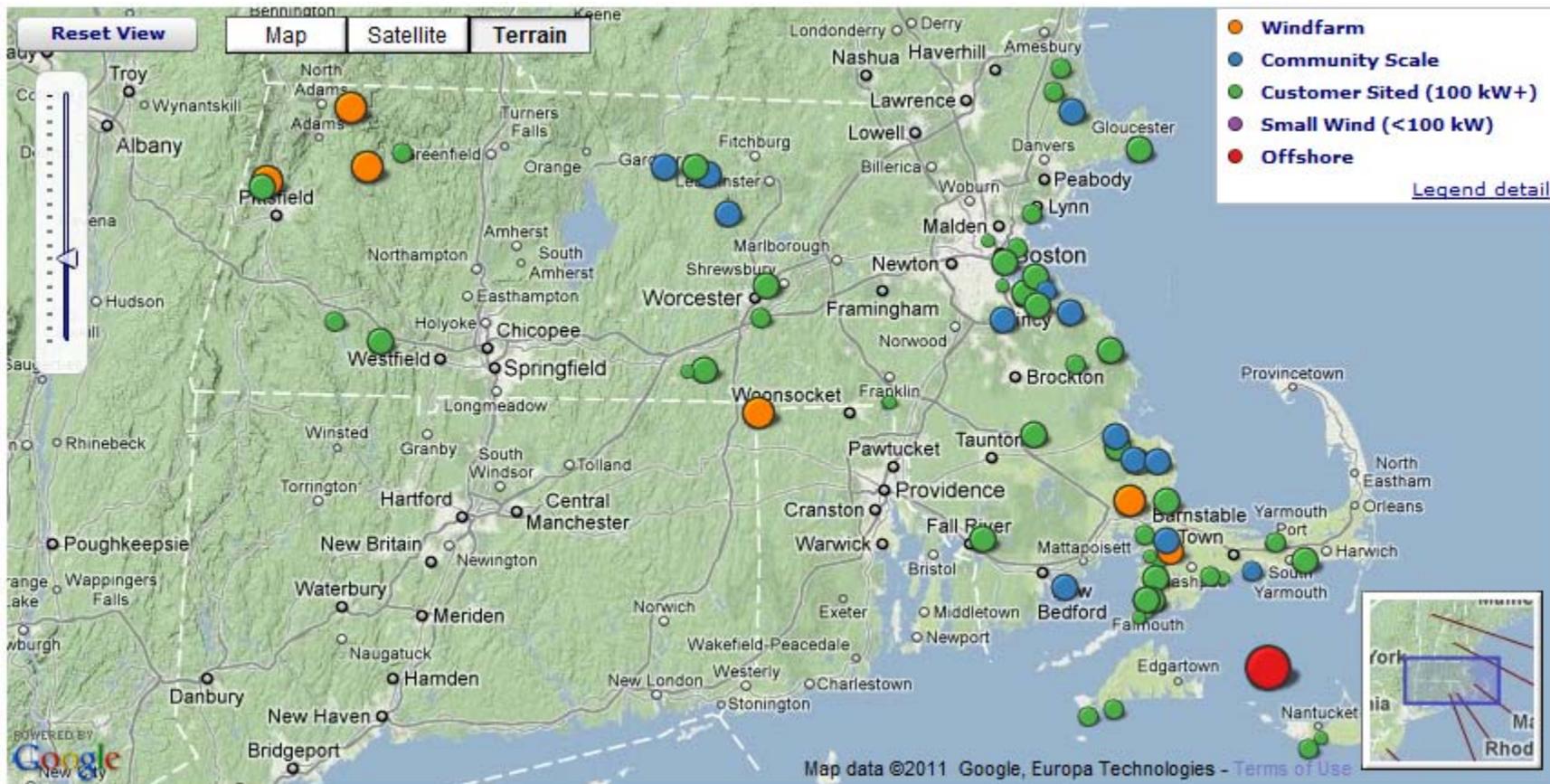
Photo Credit:
TransCanada Power Marketing Ltd.



Hull 1
(photo credit: Bob Grace)



Massachusetts Project Map

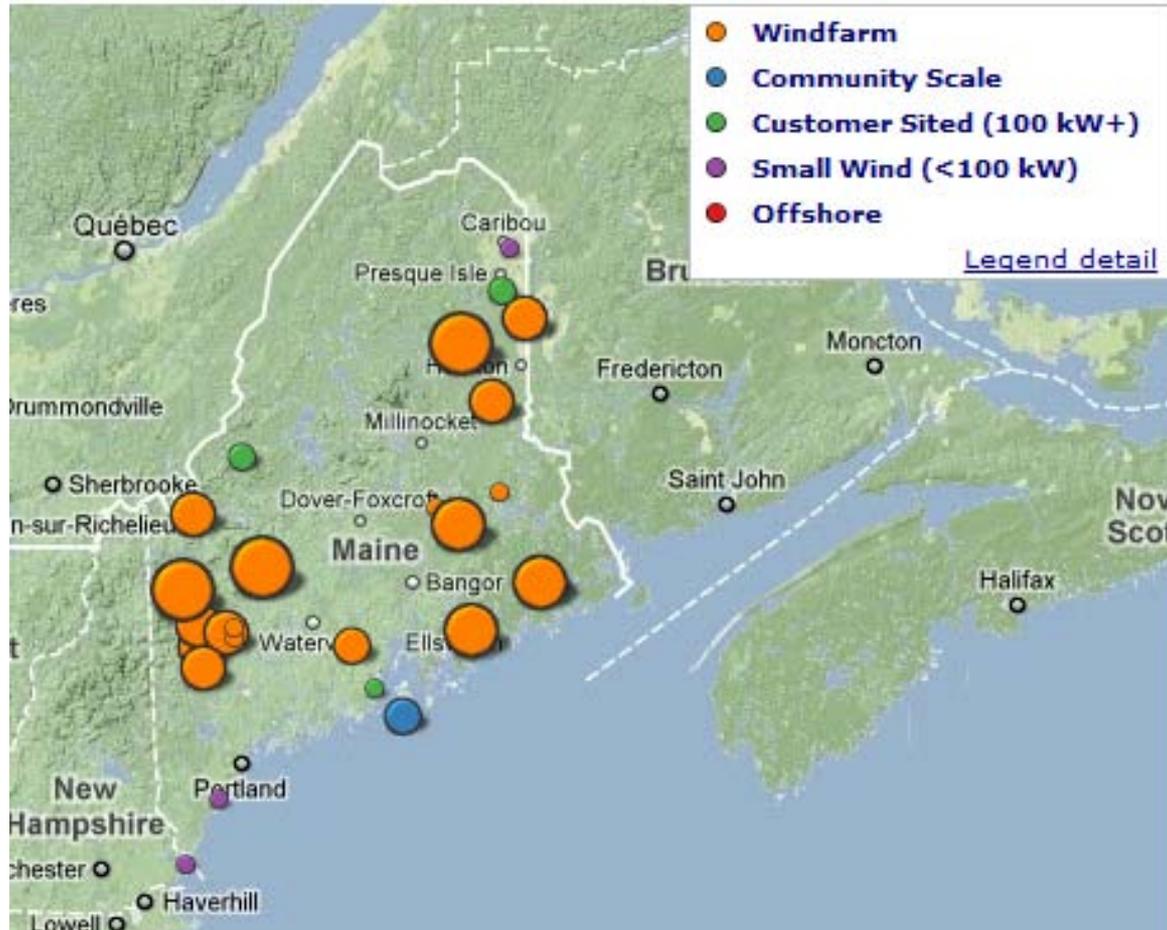


New England Wind Forum

<http://www.windpoweringamerica.gov/newengland/projects.asp>



Maine Project Map

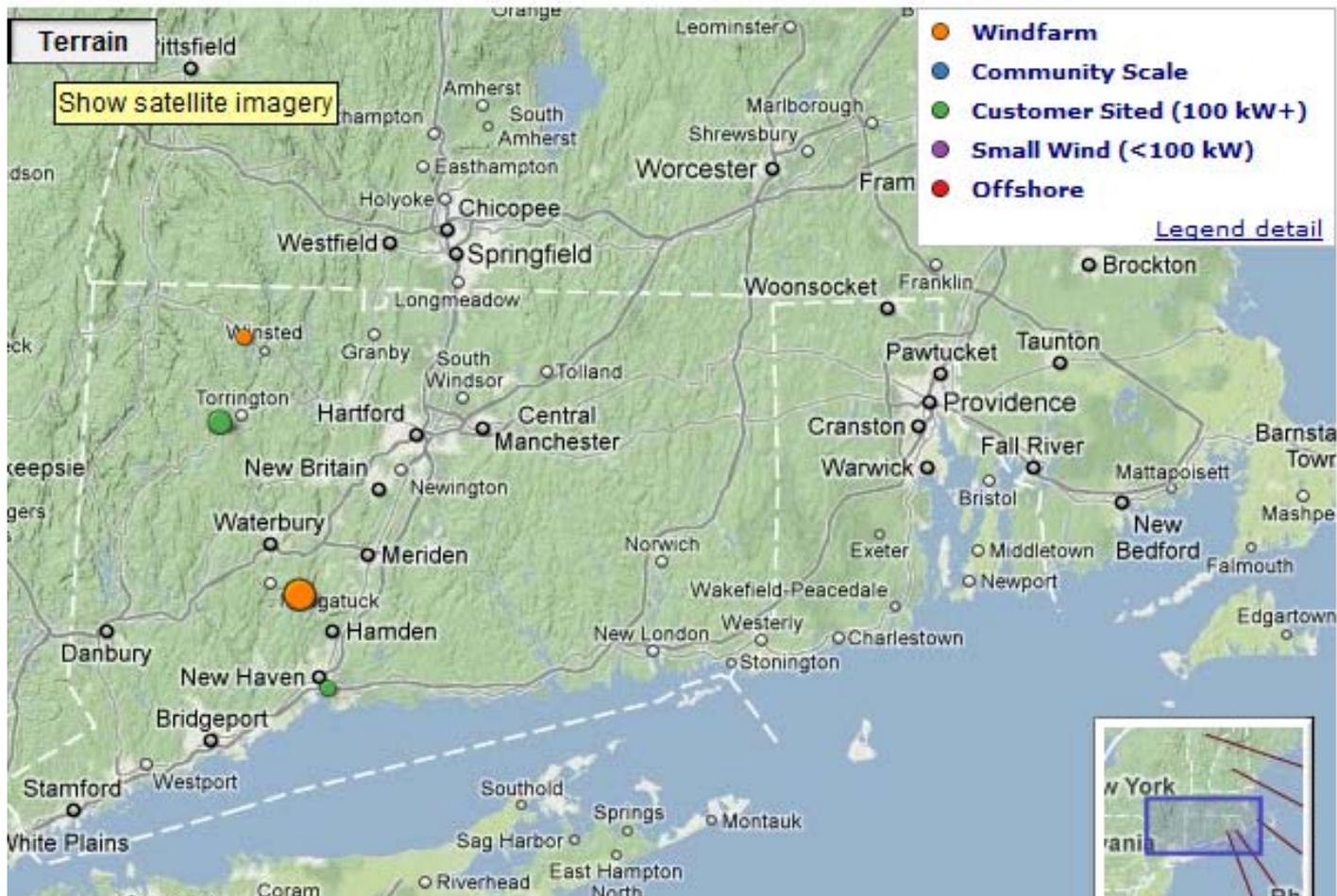


New England Wind Forum

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Connecticut Project Map

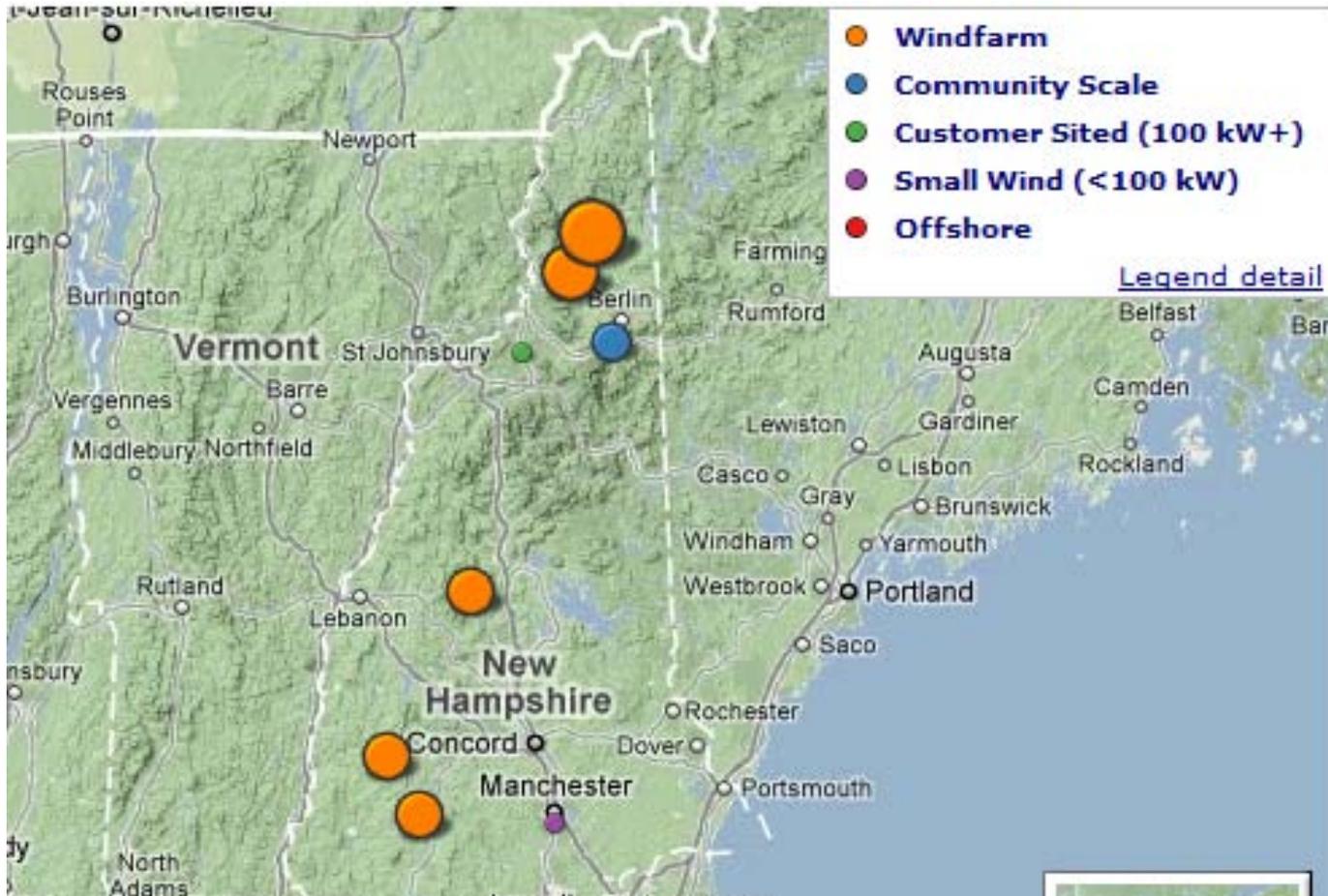


New England Wind Forum

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New Hampshire Project Map

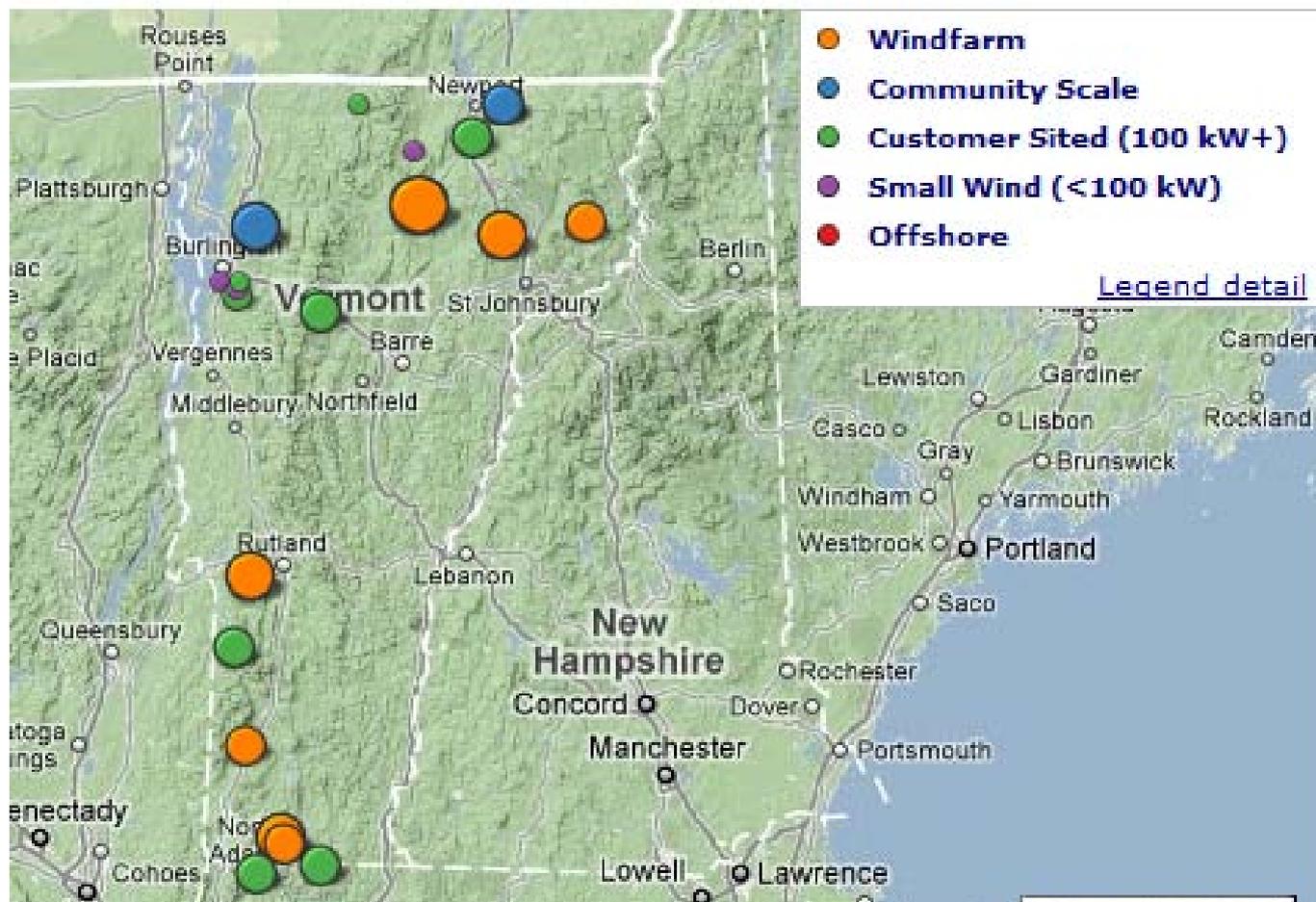


New England Wind Forum

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Vermont Project Map

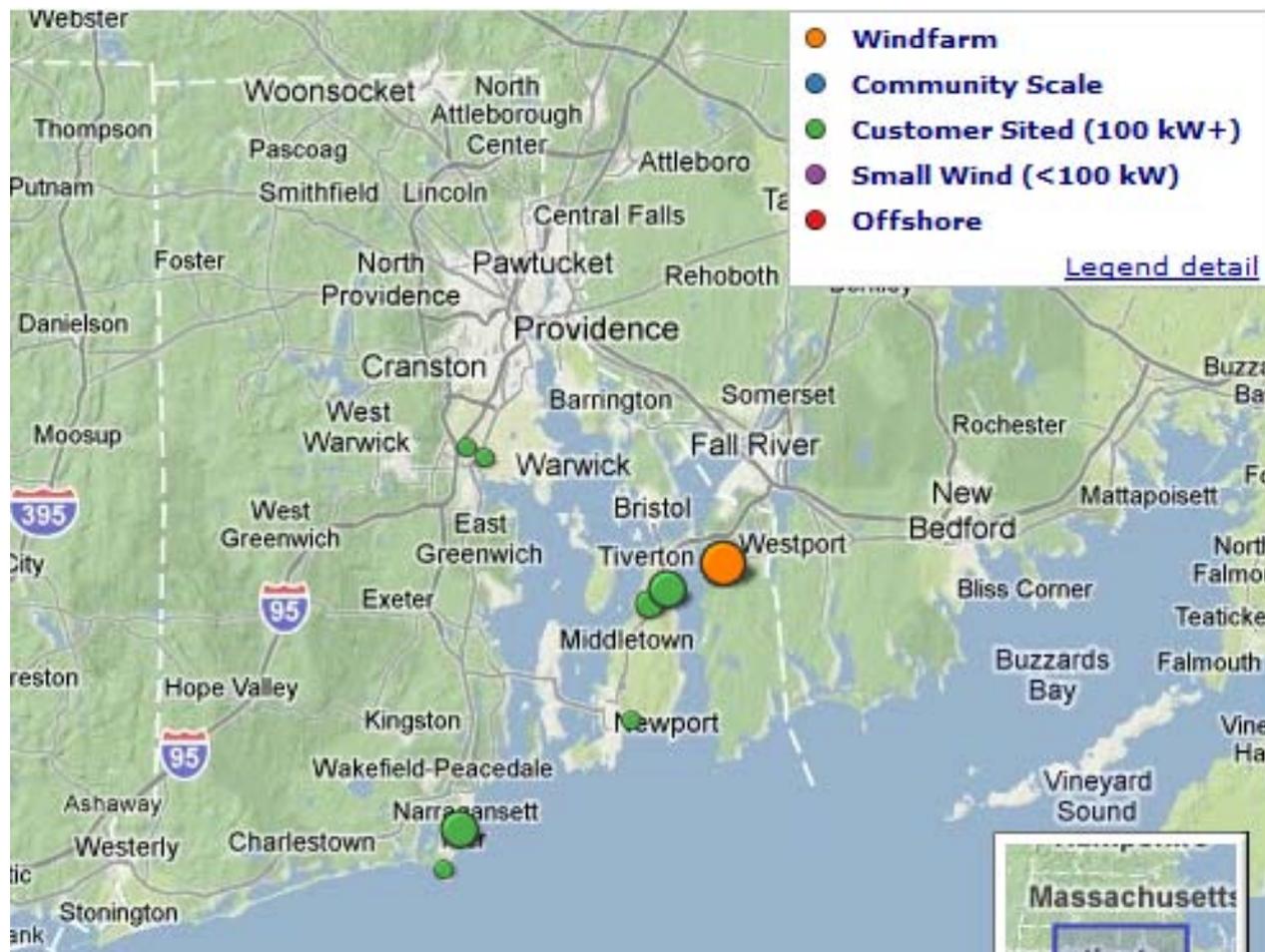


New England Wind Forum

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Rhode Island Project Map

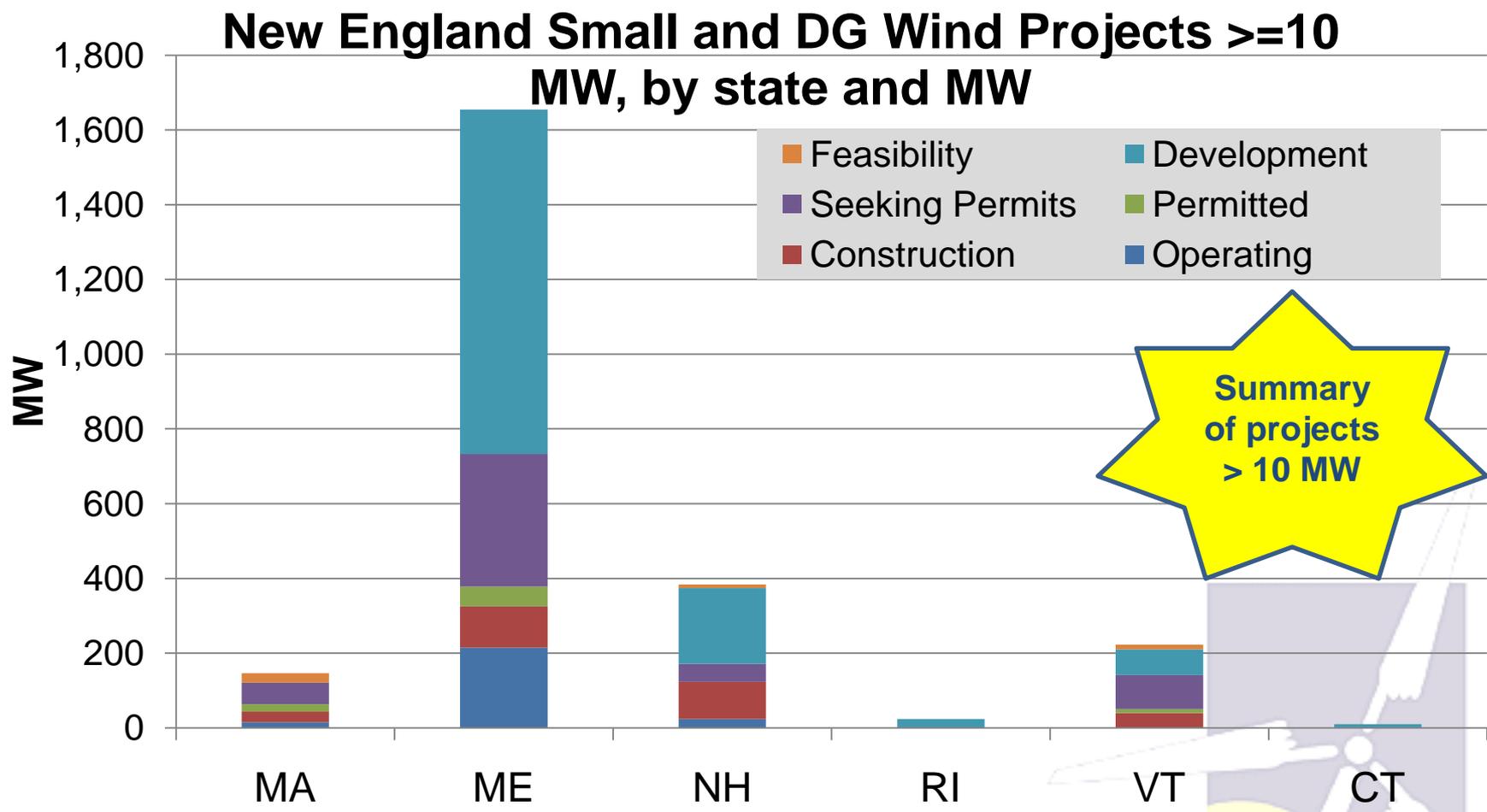


New England Wind Forum

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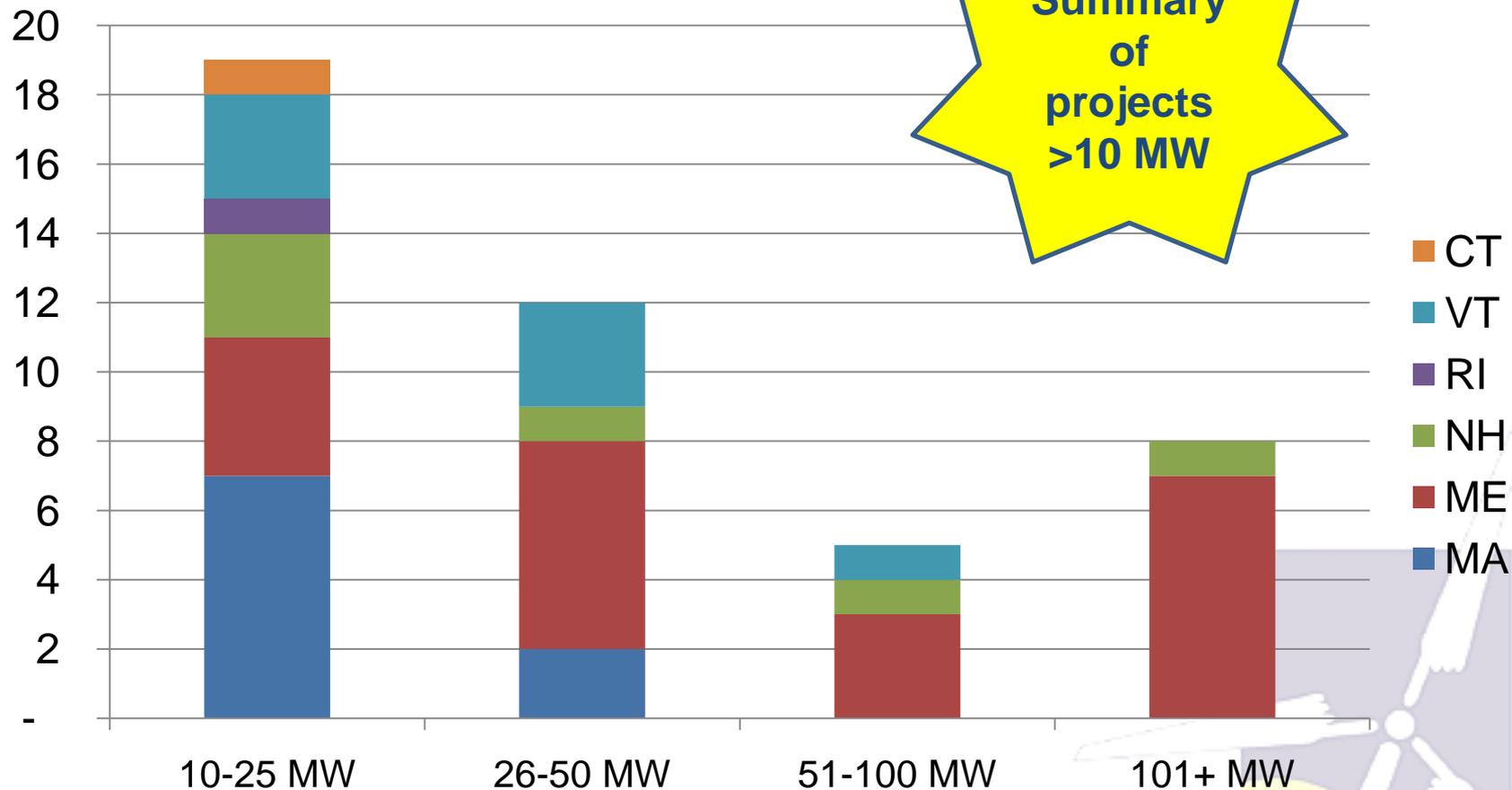
Land-based: MW by state & status type



Source: Sustainable Energy Advantage, LLC proprietary database – 'Public' projects



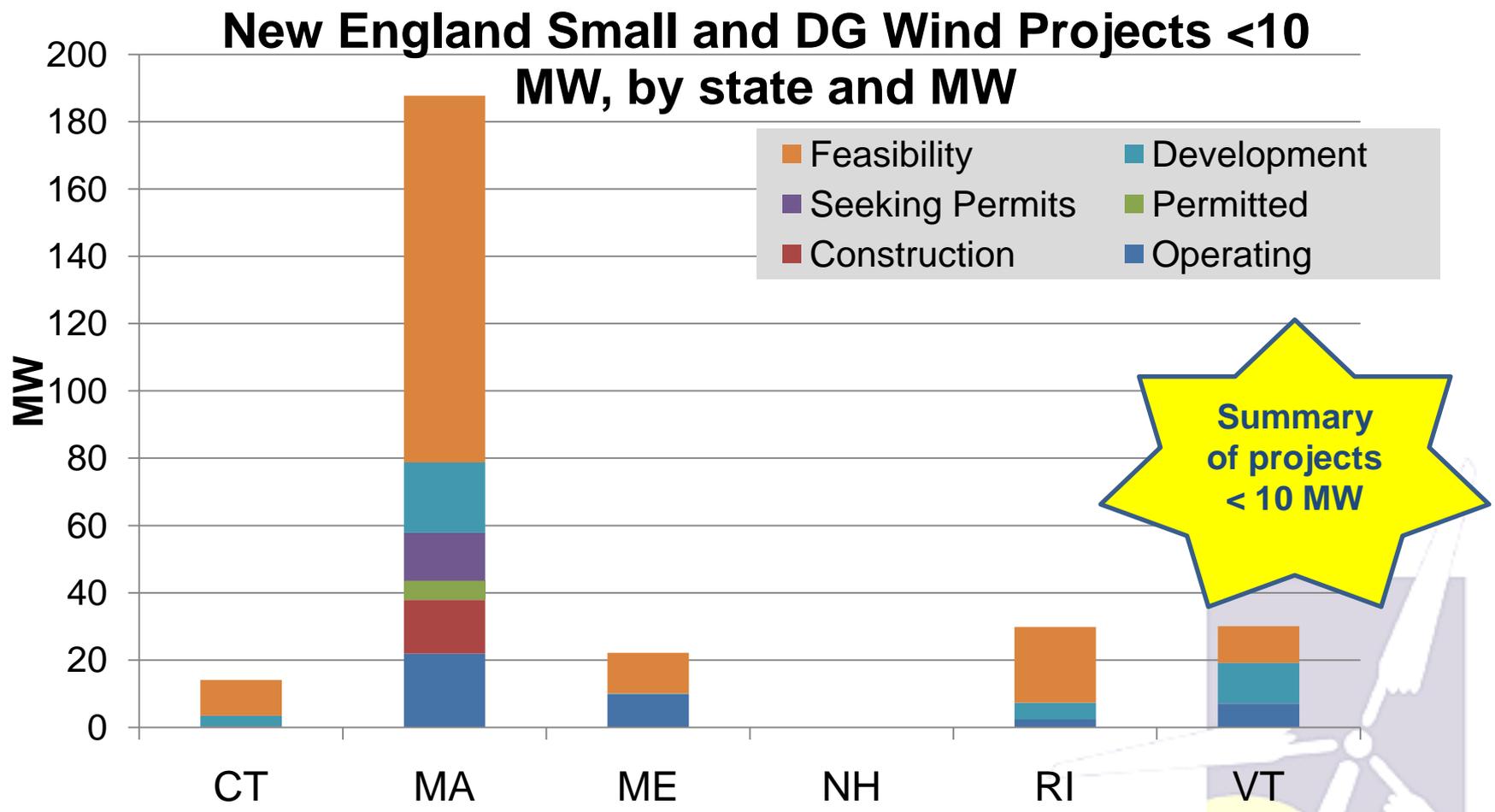
Land-based: #, by size & location



Source: Sustainable Energy Advantage, LLC proprietary database – 'Public' projects



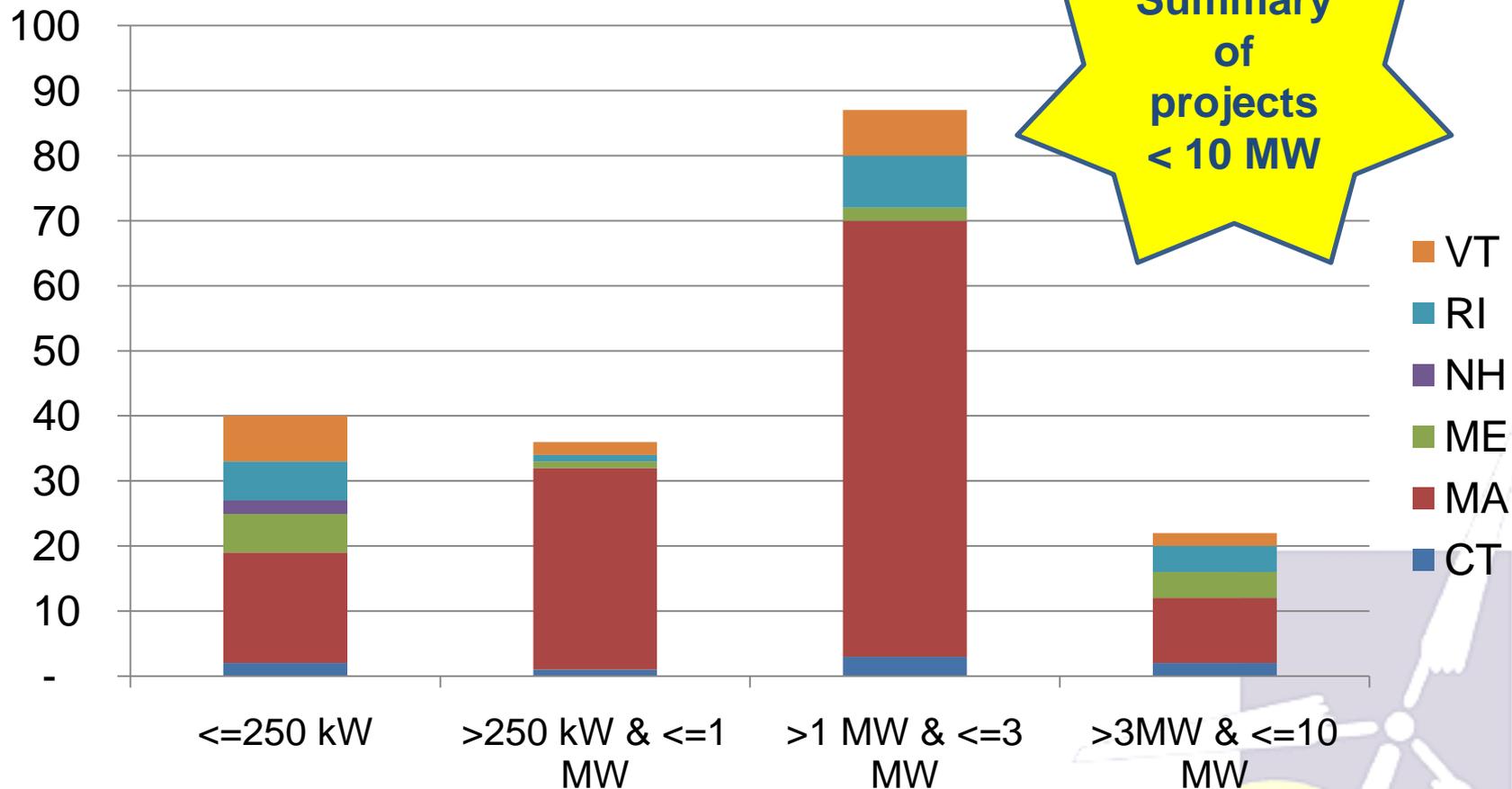
Land-based: MW by state & status type



Source: Sustainable Energy Advantage, LLC proprietary database – 'Public' projects



Land-based: #, by size & location

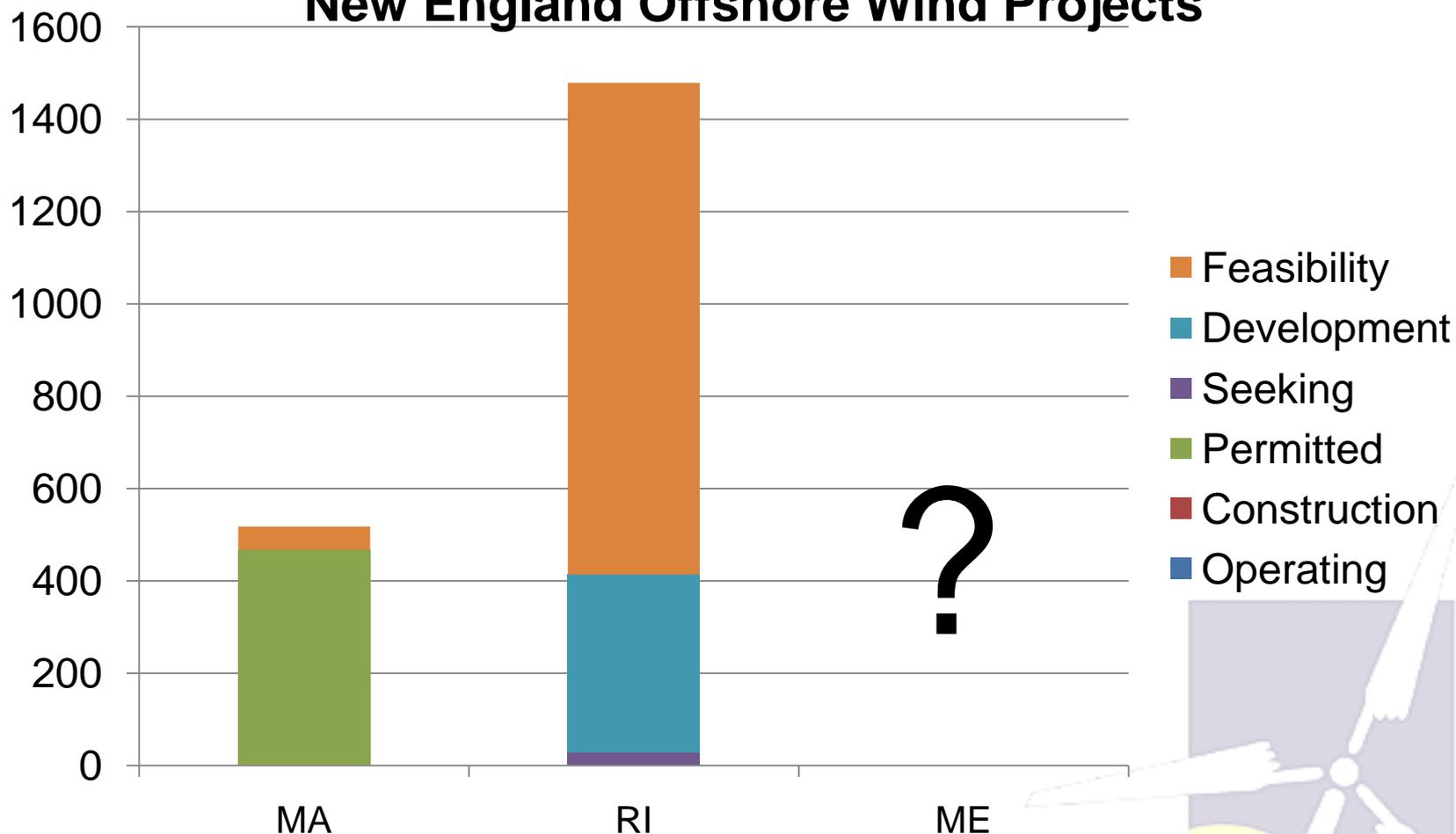


Source: Sustainable Energy Advantage, LLC proprietary database – 'Public' projects



Offshore: MW by state & status type

New England Offshore Wind Projects



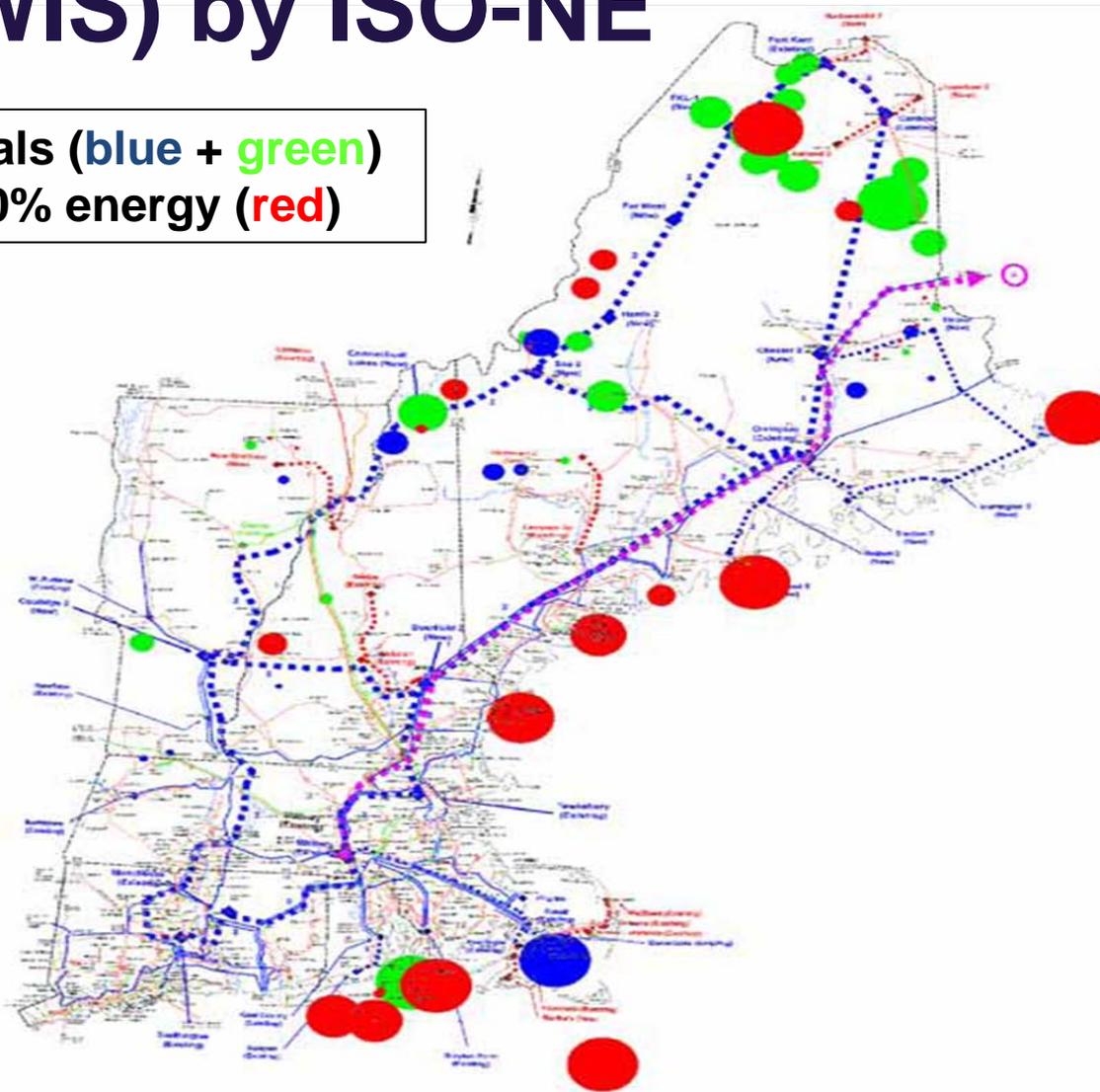
Source: Sustainable Energy Advantage, LLC proprietary database – 'Public' projects



New England Wind Integration Study (NEWIS) by ISO-NE

Queue proposals (blue + green)
Additions to 20% energy (red)

One of many possible futures:





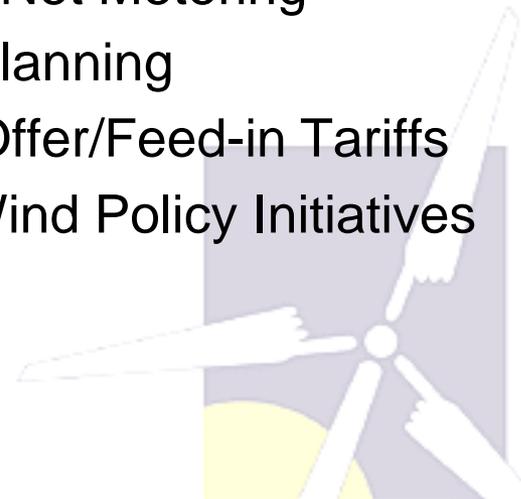
Key Factors Influencing Wind Development Activity

Market Factors:

- Revenue Uncertainty
 - Energy
 - Renewable Energy Credits
- Availability of Investment Capital
- Equipment Cost Trends
- Transmission Capacity
- Grid Integration
- Public Acceptance

Policy Factors:

- Renewable Portfolio Standards
- Long-Term Contract Initiatives
- Federal Incentives
- Aggregate Net Metering
- Regional Planning
- Standard Offer/Feed-in Tariffs
- Offshore Wind Policy Initiatives



Sustainable Energy Advantage, LLC

Office:

10 Speen Street, 3rd Floor
Framingham, MA 01701
www.seadvantage.com

Contact:

Jason Gifford
tel. 508.665.5856
jgifford@seadvantage.com