

La Provence WINDY MARSEILLE

THE EUROPEAN WIND ENERGY ASSOCIATION - communication@ewea.org - www.ewea.org

Thursday 19 March 2009



Offshore market deployment and prospects

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A FITTING TRIBUTE

Recognising Mechtild Rothe, Vice President, EU Parliament

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GLOBAL CHALLENGES

Exploring wind power's future potential

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BACK TO THE FUTURE

Poland's Deputy Prime Minister on EWEC 2010

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▶ EWEA staffers and President Arthouros Zervos gather at the association's EWEC stand late Wednesday for a toast to this year's event in Marseille and next year's in Warsaw.

CFD++^{WPS} - A fully automatic CFD tool for Siting Analysis

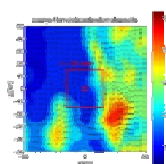
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EWEC Hall 3, booth 3436



Forever wind, forever now



Summing up EWEC 2009, Christian Kjaer says the future provides both challenges and rewards.

As EWEC 2009 begins winding down and conference delegates start leaving this beautiful French city by the sea, I feel it is important that all of us in the wind power sector return to our regular working lives with a newly-energised sense of where the industry is heading.

Yes, it has been great spending these past few very intense days learning about wind, discussing national action plans, debating economic theory, sharing ideas on how to get more non-polluting electricity onto our grid systems and coming to grips with the destructive legacy of CO₂.

Being sequestered away in this friendly and captivating bubble that the conference became was a welcome respite from our everyday tasks.

But we know, even if wind power no longer has to continually demonstrate to the sceptics that it is capable of delivering vast amounts of environmentally-friendly, local, dependable electricity, that there is still much work ahead of us for the foreseeable future.

On many fronts time is running out. Yet, as EWEC 2009 has shown, our industry is up to the challenge. Indeed, we are leading the way.

What that means is that we can not let our considerable and well-earned industry successes allow us to become complacent and arrogant.

We must still apply the most rigorous scientific methodology to our work. Our devotion to disciplined and expanded research must not waver. Our engineering and manufacturing practices must be beyond reproach. The intellectual approaches we use to improve wind power on a daily basis must be transparent and forthcoming. Our ability to effectively

and quickly communicate our considerable body of knowledge to policy makers, journalists and citizens needs continual updating.

In short, we still have to do what we have always done to make wind power as effective as it is, only we have to do it better and more often.

That's because the stakes are huge, and getting bigger day by day.

It is not an exaggeration to say our civilisation is coming to a collective tipping point. Vast areas of Europe, not to mention the world, are running out of traditional energy sources. Increasing numbers of people want to share in the benefits that electricity offers. The continuing financial crisis shows no signs of weakening anytime soon. A beleaguered Mother Na-

ture has her own bleak score card, one called global warming.

On many fronts, then, time is running out.

Yet, as EWEC 2009 has shown, our industry is up to the challenge. Indeed, we are leading the way.

As an industry, we can already offer an increasing percentage of energy independence by retaining money locally instead of spending it on imported and polluting fossil fuels. We create jobs and wealth. We are dependable and timely. We do not pollute. We are forever.

With collective perseverance, wind power will be part of a new and better future.

Christian Kjaer
CEO, European Wind Energy Association



DON'T MISS TODAY

SESSIONS

Check out the full conference programme for sessions on:

- Business and policy
- Science
- Technology
- Grids

DP4 Closing session

15:30

POLICY BRIEFING

Offshore wind energy: Blueprint for a North Sea grid
Members' Lounge

10:30

A look into the future - Sweden

Offshore wind to play bigger role in Sweden

Our next big industry gathering will take place in Stockholm, Sweden in September 2009 where we will take a closer look at offshore wind technology and its promising development (www.ewec2009.info). This is the reason why we focus in on Sweden today in the last edition of "Windy Marseille". But we hope we will write more on the Swedish market in "Windy Stockholm"!

Focus on Sweden:

- With 235 MW (megawatts) installed last year, the total capacity of wind power installed at the end of 2008 passed the symbolic benchmark of 1 GW (1,021.33 MW).



- In 2008, the Swedish wind market produced 2,000 GWh.
- The Swedish Wind Energy Association is expecting to have installed a total of 6,100 MW of onshore wind by 2020.
- The association also expects an additional 3,000 MW of offshore wind which leads to a total of 9,100 MW by 2020. /iv

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EWEC draws to a close



Poul la Cour prize is to be awarded to Mechtild Rothe.

After four days of dynamic discussions, information exchange and networking, EWEC 2009 will come to an end this afternoon. The closing session will draw together the many debates held and questions raised over the last few days and look ahead to the coming months, considering the steps that need to be taken.

Frans Van Hulle, technical expert for EWEA and the coordinator of TradeWind report, will summarise the main messages and conclusions to come out of the conference in order to give the key thoughts and information to take home.

Peter Hjulær from Risø in Denmark will then announce his choice for the winner of the poster competition, which has been running throughout EWEC.

The wind energy sector's most prestigious prize – the Poul la Cour prize – is to be awarded to Mechtild Rothe, Vice-President of the European Parliament, for her outstanding achievements and long-held support for renewable energy.

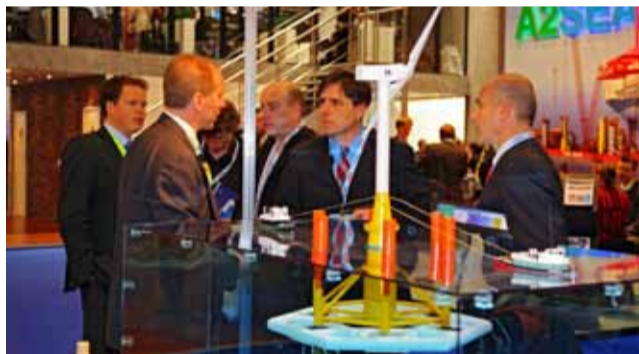
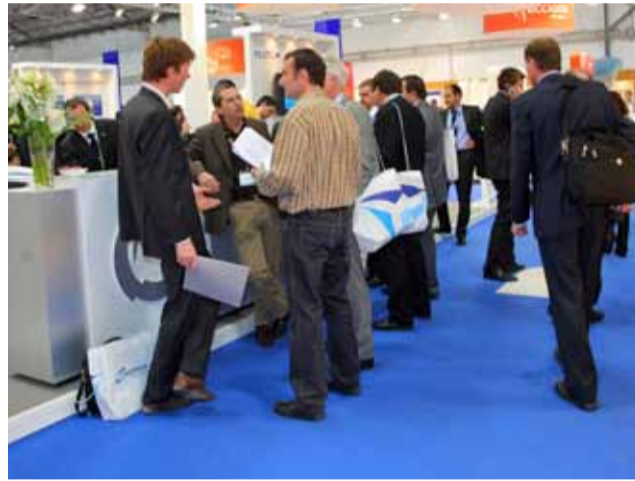
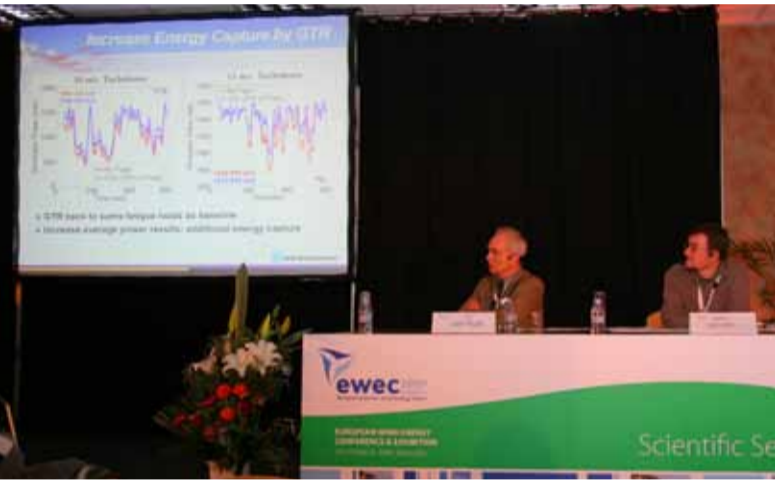
Born in 1947, Rothe joined the Social Democratic party in 1970 but only became an MEP in 1984 after some years spent working in a laboratory and then as a teacher. During her first decade in the European Parliament, she dealt with agricultural policy and foreign policy on Cyprus. In 1995 she started

to work on energy, and in particular, renewables and energy efficiency. From the 1997 Green Paper on renewables, which kicked off the discussions on renewable energy in Europe, she has been actively involved in every report and EU legislation on renewable energy ever since.

Notably, Rothe was actively involved in the process of creating, improving and negotiating through Parliament what has been called until now "the most important piece of legislation for renewables in the world" – the 2001 Renewable Electricity Directive. She was also responsible for the 2006 Report with recommendations to the Commission on heating and cooling from renewable sources of energy, which was part of the reason why the Commission came to propose the binding 20% Renewable Energy Directive. In January 2007, Rothe became Vice President of the Parliament. Last night she received the award – a small symbol of the vast contribution she has made to the sector over the last 12 years - to huge and heartfelt applause.

The closing session – and EWEC - will officially come to an end when Jean-Claude Gaudin, the Mayor of Marseille, hands over to a representative of Poland, where EWEC 2010 will be held from 20 to 23 April 2010 in Warsaw. /sc

EWEC photos from Wednesday



QUOTES OF THE DAY



"Despite the financial crisis, the fundamentals of our industry are very sound. The economic stimulus packages being considered need to be worked out with our industry this year to make sure we get the vital green revolution the planet needs."

Piers Guy,
Nuon Renewables



"In reference to the financial crisis, keep calm and carry on."

Dr. Hans Duivenvoorden,
ECOFYS



"The political attractiveness of wind is because it hedges against future electricity prices, creates jobs and reduces CO₂."

Peter Brun,
Vestas

"What the supply chain needs are long-term mechanisms to ensure confidence and stability."

Ian Mays,
RES

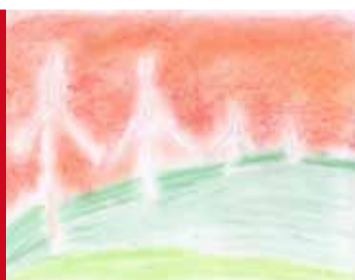
"We need sustainable wind turbine components - higher quality at lower costs."

Per Hornung Pederson,
PEPower

DID YOU KNOW?

Most modern wind turbines have three blades. But this has not always been the case. In the 1980s and 1990s, some attempts were made to develop one- and two-blade wind turbines. The three-blade concept is a compromise between efficiency, cost, noise, appearance, and mechanical efforts on the drive train and the mast. Modern wind turbines have an efficiency that is very near the Betz limit, which is the maximum theoretical efficiency. /nf

The wind through children's eyes:
Anna Linfoot,
age 9,
United Kingdom



A global challenge becomes an opportunity



Panelists at EWEC session on Wednesday discuss global challenges and opportunities for the wind industry.

Global installed wind energy capacity can reach 1,000 GW by 2020 as per the Global Wind Energy Council's advanced scenario, as long as three challenges are addressed, delegates heard yesterday morning. Analysts and representatives from turbine manufacturers and industry spoke of the exciting growth and potential of wind energy, and

what steps still need to be taken, at a busy session entitled 'Global Challenges and Opportunities'. "Once a good regulatory framework such as the EU's Renewable Energy Directive is in place, the three main challenges for meeting the 1,000 GW target by 2020 concern the transmission grid infrastructure, the supply chain and human resources",

explained Ian Mays from RES, session co-chair. Peter Brun from Vestas added that although the outlook for the industry globally is good, it is important not to become complacent as there are still considerable challenges to be faced.

It was explained in the session that there are three main wind energy areas. Firstly, there

is Europe, which has over 50% of the total installed capacity worldwide, as Eduard Sada de Vedrona of Emerging Energy Research pointed out. The other two areas are North America – the US installed 85 GW in 2008, becoming the number one country in terms of new installations – and Asia-Pacific, which includes China, whose capacity doubled in 2008 for the fourth year in a row to reach 12.2 GW.

"The three main challenges for meeting the 1,000 GW target by 2020 concern the transmission grid infrastructure, the supply chain and human resources"

It is essential that grid infrastructure is improved in all three of the 'main' wind energy areas to integrate and transport more electricity from renewables. "New electricity infrastructure and power markets reforms are needed", explained William Young of New Energy Finance,

adding that another crucial factor in wind energy's global development was a post-Kyoto agreement for 2012. Grid issues were also cited as the main reason why the wind energy potential in Africa has so far been exploited only to a very limited extent.

The supply chain is another key factor for global growth. The demand is enormous, and supply needs to be able to keep up. Long-term mechanisms are needed for confidence and stability, panelists agreed.

Human resources will also be crucial. Bruce Douglas from EWEA, co-chairing the session, stated that according to GWEC, the 1,000 GW target would provide jobs for two million people. It was proposed that the industry work more closely with universities to ensure enough people are found and properly trained for the wind industry. Another key issue, according to Per Hornung Pederson from REPower, is further improving the quality of components. "We need even higher quality at lower costs", he said.

Despite these issues, the gen-

eral mood regarding the 1,000 GW target by 2020 was very optimistic. As Denise Bode of the American Wind Energy Association said: "we've got the wind at our backs." /sc

For more information on the 1,000 GW target, see page 7.



Between the time EWEC 2009 opened Monday morning and 4 p.m. Wednesday, the counter showed wind power in Europe had generated 902,826,337 KWh of electricity, attracted 61,578,337 Euros in investment, saved 772,141 tonnes of CO₂ and built 31 wind turbines.

New power grids essential to achieve Ambitious EU climate and energy goals



"If the EU is to meet its CO₂ reduction and renewables targets, improve security of supply and create real competition in

the European power market, we need to extend our power grids and change the way we operate them," explained Arthouros

Zervos, President of the European Wind Energy Association (EWEA) at the European Wind Energy Conference (EWEC) in

Marseille on Wednesday.

An extended grid with changed operating procedures is necessary to rejuvenate the EU's power system, and will help reduce its operational costs whether more wind is added or not. An upgraded grid would, however, also allow larger amounts of wind onto the system. As such, it would go a long way in helping the EU meet its 2020 targets, reduce CO₂ emissions and ultimately make electricity more affordable for consumers.

"At current fuel prices, electricity production costs from a new wind farm, coal plant and gas station are more or less the same. If a truly interconnected European grid existed and power markets were effective, the uncertainty of volatile carbon and fuel prices would ensure that wind, which avoids these unknown quanti-

ties, would become the most cost-effective of the three," explained Zervos. "We need the power markets to work to ensure that future investors are fully exposed to fuel and carbon price risk."

Moreover, EU power markets currently remain biased towards traditional fuels because they are dominated by vertically-integrated power companies. The European Commission's third liberalisation package, currently being negotiated by the European Parliament and Council, aims to open markets up more by at least partially separating production and transmission activities. For a truly competitive market, the full ownership unbundling of the vertically-integrated power companies is necessary.

In the new Renewable Energy Directive, electricity from renewable sources has been guaranteed

priority dispatch and priority access to the grid. In the absence of full unbundling, priority access and dispatch are both extremely important for the sector. However, there are still issues such as bottlenecks (where parts of the grid are used to their full capacity) which restrict access to cheaper generation resources such as wind power.

Some of the grid-related issues are addressed in a new report from the TradeWind project. Entitled 'Wind Integration: developing Europe's power market for the large-scale integration of wind power', the report will be discussed at the TradeWind workshop taking place at EWEC 2009 today.

For more information on TradeWind and to download the new report, go to www.ewea.org

Offshore needs transparency

Although offshore European wind power has enormous potential, investors aren't overly eager to back the sector because current regulatory policies and subsidies are confusing and inconsistent.

That was the inescapable conclusion repeatedly hammered home Wednesday at an EWEC session dealing with offshore market deployment and prospects.

"The landscape overall looks quite messy," Irene Allcroft of Douglas-Westwood Limited, a UK energy research and analysis company, told people attending the event.

"There is a need to better understand available tariffs, support mechanisms and revenue stream structures to make informed investment decisions on

future portfolio developments across Europe."

Allcroft also said the capital costs of offshore wind need to be reduced so that investors can expect sustainable economic returns without subsidies. An existing lack of clarity also affects investment, she said.

In discussing market forecasts, Allcroft said that while the global installed offshore wind capacity is still quite small, there is still interest among a number of countries to begin developing offshore projects.

Yet regulatory confusion and profit uncertainty slows down investment, she added. In the short-term, she concluded, incentives are simply not enough to keep investors happy.

Statistics compiled by the European Wind Energy Association (EWEA) indicate a total of 1,471 MW of offshore wind was installed worldwide by the end of 2008, all of it in EU waters. According to EWEA's reference scenario, there will be 3.5 GW of offshore wind in the EU by 2010, 35 GW in 2020 and 120 GW by 2030.

Uffe Vinter Schou, of Vestas Offshore, said the offshore market will grow at a steady pace in future years, faster than the onshore sector.

He said that while the ongoing financial crisis will create uncertainty for a number of years, there will be a narrowing gap in the cost of energy between offshore and onshore wind./cr

Developing Europe's power market for large scale integration of wind into the electricity grid

People attending today's TradeWind session will have the opportunity to discuss with leading European specialists the project's final findings and recommendations to support the future integration of massive levels of wind power.

A two-year European project funded under the EU's Intelligent Energy-Europe Programme, TradeWind has addressed two issues of key importance for wind energy integration. These include the weak interconnectivity levels between European member states, and the inflexibility and fragmented nature of the European power market.

TradeWind has identified 42 onshore interconnectors to be upgraded which would benefit the European power system and its ability to integrate 300 GW of

wind power by 2030. The project has also made a preliminary assessment of an interconnected offshore grid serving 120 GW of offshore wind power.

TradeWind calculated that the establishment of faster markets (intra-day) for balancing and for cross-border electricity trading enable the system to deal efficiently with wind power and at the same time result in large savings in the overall costs of the power system at the European level.

The project has addressed one of the most challenging issues facing wind energy today: its maximal and reliable integration into trans-European power markets. The recent rapid growth in wind power generation, triggered by technological and industrial development, indicates that wind energy should be seen as one of the main domestic sources for electricity generation in Europe. However, with ever-increasing amounts of wind power in the system, new challenges arise for the functioning of the interconnected grid, especially for balancing, security, planning, cross-border transmission and market design.

In conclusion, TradeWind shows that integrating 300 GW of wind power in European power systems is feasible. As a general rule, the power system needs to become more flexible and better interconnected, but this will require substantial efforts in upgrading transmission lines and implementing faster and more aggregated power markets. Improving power exchange between the member states brings smoother wind power variations and better predictability which reduces the balancing costs. Aggregating wind power by better interconnecting the member states significantly increases the capacity value of wind power. In general for the power system, better interconnection provides better ability to dispatch the cheapest generation sources – such as wind power with its low marginal costs -- and in this way ensures lower wholesale electricity prices. In addition to quantifying the value of more transmission at European level, TradeWind emphasizes the need for concrete implementation plans, proper incentives and harmonised planning of the necessary transmission upgrades. /gr -fvh

Increasing amounts of renewable energy high on EWEC 2010 agenda in Warsaw

As the baton passes to Poland for next year's EWEC event, the Deputy Prime Minister answers questions about the ongoing global financial crisis, climate change and wind power, and energy security for EU nations.

Translated excerpts of an EWEA e-mail interview with Polish Deputy Prime Minister Waldemar Pawlak.

Which do you see as a bigger problem – the ongoing global financial crisis; climate change caused by burning fossil fuels; or providing a stable and secure energy supply for a growing population?

The current financial crisis is very serious; it is however a transitional phenomenon which is to a certain extent the natural result of the normal economic cycle. The other two problems are a long-standing part of the development of civilisation.

This unprecedented green revolution is also currently sweeping across the European Union and must embrace the whole world.

What role do you see wind power playing in all three of the scenarios?

Wind energy, both on and offshore, has an important role to play in the fight against the abovementioned problems. The production of energy from renewable sources (RES) clearly contributes to the reduction of CO₂ emissions. At the same time, the development of wind energy has a positive impact on energy security, by diversifying energy sources and by reducing the dependence of Member States on fossil fuels from third countries.

By the time EWEC 2010 is held in Warsaw, what do you think the global financial situation will look like?

It looks as though the economic slowdown or recession on the big-

gest world markets will not be resolved over the course of this year, and consequently 2010 will be another challenging year for the financial markets.

On the same basis, do you think international delegates at the UN climate change conference in Copenhagen in December will have agreed to a post-Kyoto pact to more aggressively fight global warming?

It will only be possible to reach an agreement when solutions have been proposed which are acceptable to developed and developing countries alike. The agreement should be based on the global situation in terms of accessibility to and optimum use of energy sources; it should also provide instruments which will bring about a reduction in CO₂ emissions without eliminating basic energy carriers. In particular this includes coal, which requires solutions involving the development of clean coal technologies rather than its removal from the world "energy mix".

A universally-acceptable approach should take into account not only the development of clean coal technologies but should also work on improving energy efficiency as well as the widespread use of energy from renewable sources. However the imposition of restrictive obligations to reduce CO₂ emissions, totally unacceptable to many countries, is not a solution.

How important is wind power to Poland today and how do you see it developing between now and 2020?

The Ministry of Finance attaches particular importance to promoting the development of renewable energy, including wind energy.

Do Poland's vast reserves of coal work against the future development of wind power and other renewable energies in your country?

The existence of coal resources in Poland does not in any way hinder the development of wind



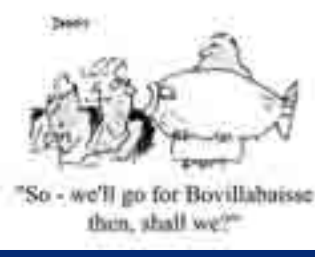
energy. The development of wind energy constitutes an essential element of Polish energy policy. A greater diversity of energy carriers in Poland will lead to improved energy security.

What are the main topics and messages you would like to see explored at EWEC 2010?

Together with an increase in RES as a proportion of the energy balance, the question of the correct operation of power systems is becoming increasingly important, as is the possibility of limiting the negative impact of wind farms on these systems.

US President Barack Obama and others have recently spoken of the urgent need for a new green energy revolution to help revive the economy, drastically reduce greenhouse gas emissions and create a more dependable, more local energy supply. What are your thoughts on this?

The United States' new approach to countering climate change is very important, especially given the current debate on an international agreement on climate protection. I share the opinion that major changes are required in energy production, to allow a significant reduction in CO₂ emissions. This unprecedented green revolution is also currently sweeping across the European Union and must embrace the whole world.





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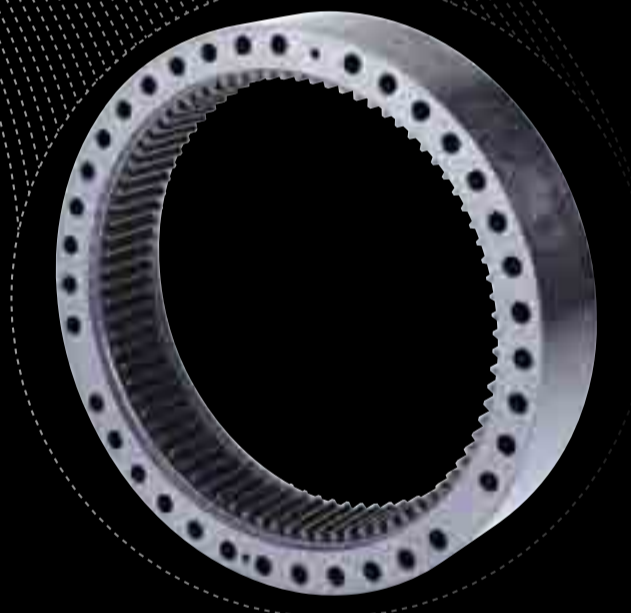
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Tenfold increase in global wind installations by 2020?



► Bruce Douglas commenting on global growth at EWEC.

Wind energy has become a mainstream power generation source, providing electricity to millions of people in over 70 countries around the world. It is now one of the leading sources of new generation in the US and Europe.

In addition to environmental benefits, wind energy also provides a sustainable answer to increasing concerns about security of energy supply and volatile fossil fuel prices. Moreover, wind energy has become a key factor in economic development, currently providing more than 350,000 'green collar' jobs through direct and indirect employment.

The global wind industry reached an impressive 100 GW of installed capacity in early 2008, growing 29% in the same year.

The Global Wind Energy Council (GWEC) predicts that, as early as 2020, we could pass the 1,000 GW mark. The majority of wind installations will take place in Europe, US and China; however other countries such as Canada, India, Mexico and Brazil are also expected to show significant growth.

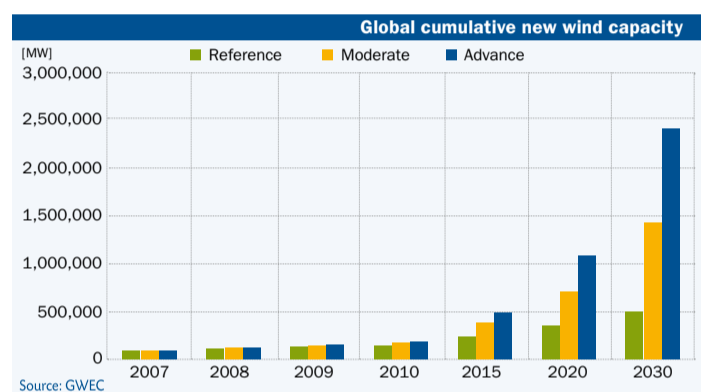
If this tenfold increase is achieved, wind energy will provide over 12% of the world's electricity, employ two million people and save as much as 1.5 billion tonnes of CO₂ every year. This advanced scenario assumes that all policy options in favour of renewables are adopted at an early stage.

The introduction of legally binding targets for renewable energy, significant investment in new electricity infrastructure and

electricity market reforms must be implemented globally if the huge opportunities presented by the worldwide wind resources are to be fully exploited. These initiatives, combined with the successful negotiation of a strong post-Kyoto climate agreement, would help drive the wind power sector.

Clean energy businesses now need governments around the world to rapidly adopt and implement these supportive regulatory frameworks and infrastructure projects. Investors, manufacturers, component suppliers and power companies would then rapidly respond with the huge investments necessary to achieve this ambitious new energy future.

Bruce Douglas
COO, European Wind Energy Association



The six "Ws" of climate change: five questions, one very positive answer

In the last three years, we have gone from a situation where it was necessary to convince people that climate change was happening, to a point where its reality is widely accepted, and the question is what to do about it.

The climate is indeed changing, both physically on the Earth's surface and in the UN negotiation arena. At the UNFCCC, the Framework Convention on Climate Change, things are moving slowly. It was decided in 2007 at the annual climate change conference in Bali that negotiators would try and agree to a new post-Kyoto Protocol by December 2009 in Copenhagen.

But with national interests competing with climate necessity, a political agreement with heavy financial impacts among so many countries may be difficult to reach.

If the "why" we need to do something is now clear, four other "Ws" remain up for discussion.

1. Who will have to reduce emissions, and how much? This will most probably remain unsolved until the very last day of the Copenhagen meeting. Each country is only willing to do so much, and waiting to see what other nations promise to do. The US has recently agreed to re-engage the global climate change discussions,

but it will not be part of the deal if China, India and Brazil don't have binding targets as well.

2. Where to reduce emissions? Some industrialised countries would prefer to carry on using their dirty fossil fuels and simply pay for reduced emissions in developing countries. But eventually, all will have to join in the effort.

3. By when? Even though a consensus on the necessity of a 2020 short-term target is approaching, some still speak about 2030 or even 2050, both too far away to be effective.

4. What should we do and how? The technical question. Carbon markets? Crediting systems for projects in clean infrastructure (CDM)? Sectoral agreements? Even though the idea of global emission trading is gaining momentum, the question is still unanswered.

At EU level, most of these questions have been answered by the "Climate and Energy Package", four linked EU directives giving Member States objectives by 2020, and the way to reach them. The 2005 EU Emission Trading System, the first of its kind worldwide, hasn't been very effective. The climate package amends some of its weaknesses to make



it more efficient at reducing emissions post 2013, while avoiding the windfall profits experienced from 2005 to 2008.

Whatever happens in Copenhagen, a sixth "W" to address the burning issue of climate change can be counted on: wind energy. That's because wind power has long ago proven it can help mitigate the worst ravages of global warming associated with burning fossil fuels. Wind generates increasing amounts of clean, dependable and local electricity. Decision-makers have known this for some time, and now they must act on their knowledge./rg

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Upcoming events:

- **European Offshore Wind Energy Conference and Exhibition 2009** in Stockholm, Sweden, 14-16 September 2009. Call for abstracts open until 31 March 2009. www.Offshorewind2009.info

- **European Wind Energy Conference and Exhibition 2010** in Warsaw, Poland, 20-23 April 2010. www.ewec2010.info

For membership, publications or event enquiries, please contact Christi Newman at cn@ewea.org or +32 2.400.1056.

To receive regular updates about EWEA's activities, register at www.ewea.org



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