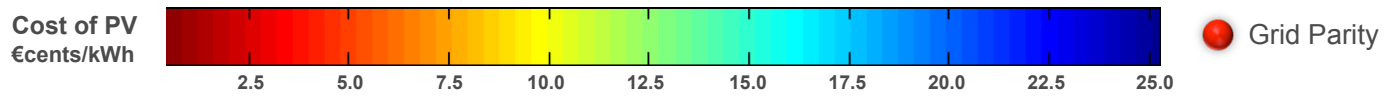
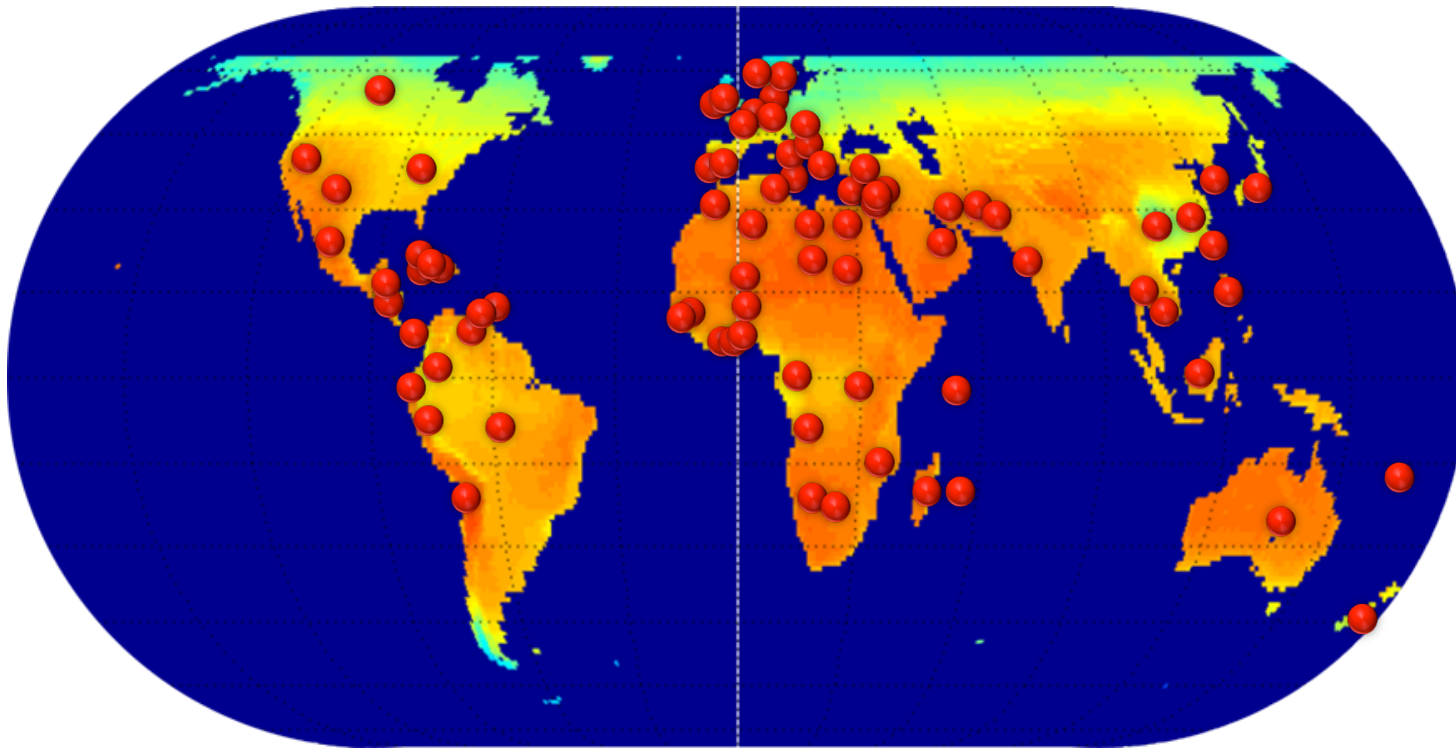


2012 Status: PV Solar at Grid Parity

R 69
G 153
B 195
R 220
G 220
B 220
R 140
G 140
B 140
R 75
G 75
B 75
R 155
G 238
B 255
R 146
G 212
B 0
R 254
G 203
B 0
R 255
G 121
B 1
R 234
G 40
B 57
R 6
G 30
B 60



Now
2012
102
countries
have
reached
grid parity

R 69
G 153
B 195

R 220
G 220
B 220

R 140
G 140
B 140

R 75
G 75
B 75

R 155
G 238
B 255

R 146
G 212
B 0

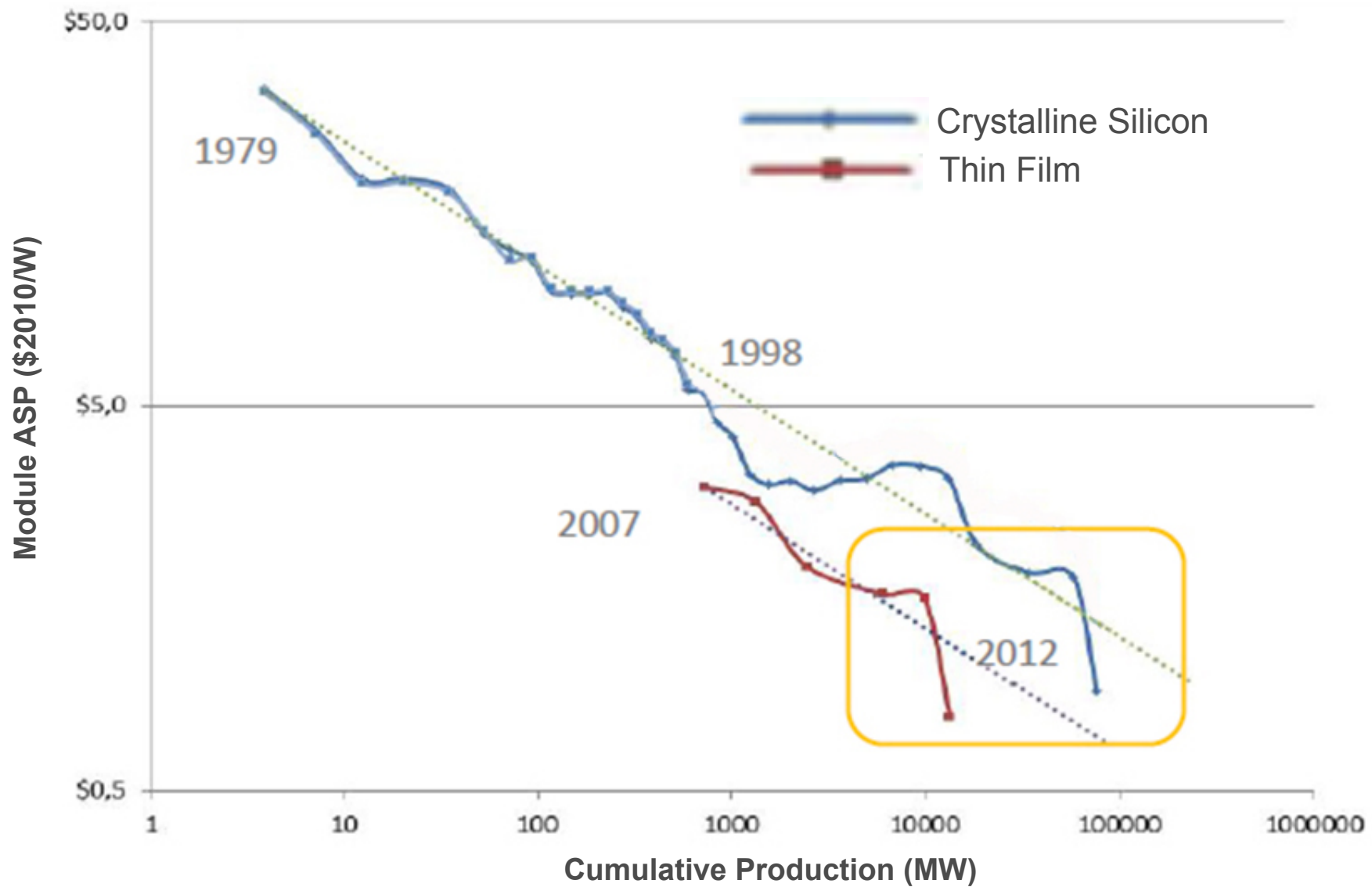
R 254
G 203
B 0

R 255
G 121
B 1

R 234
G 40
B 57

R 6
G 30
B 60

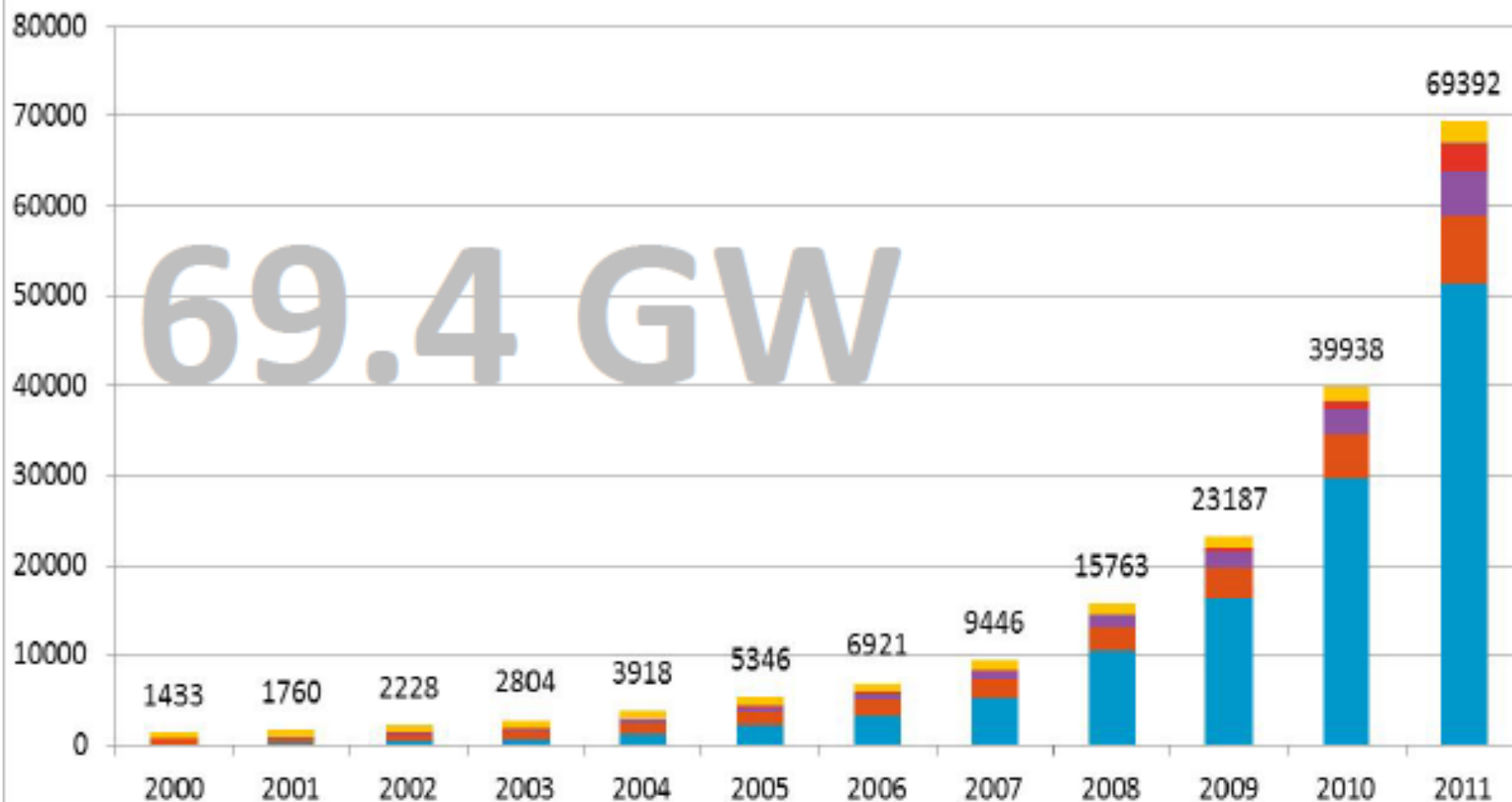
Recent Times: Accelerated Learning, New Synergies



R 69
G 153
B 195
R 220
G 220
B 220
R 140
G 140
B 140
R 75
G 75
B 75
R 155
G 238
B 255
R 146
G 212
B 0
R 254
G 203
B 0
R 255
G 121
B 1
R 234
G 40
B 57
R 6
G 30
B 60

Evolution of Global Cumulative installed Capacity 2000 - 2011 (MW)

Europe APAC AMERICA China MEA ROW



69.4 GW

Europe alone has installed more in 2011 than the total capacity outside Europe.



The Infrastructure Consortium for Africa
Le Consortium pour les infrastructures en Afrique



R 69
G 153
B 195

R 220
G 220
B 220

R 140
G 140
B 140

R 75
G 75
B 75

R 155
G 238
B 255

R 146
G 212
B 0

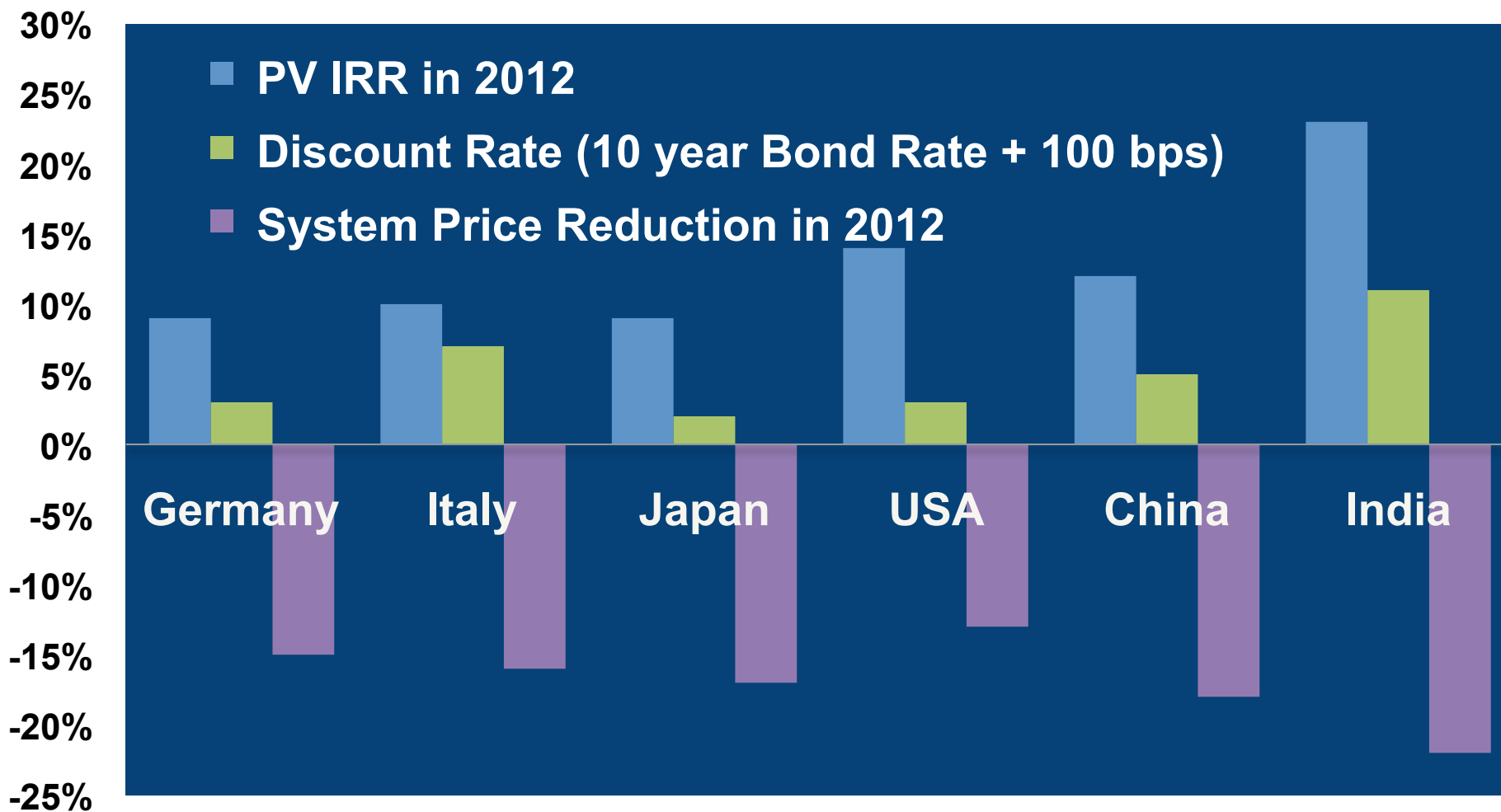
R 254
G 203
B 0

R 255
G 121
B 1

R 234
G 40
B 57

R 6
G 30
B 60

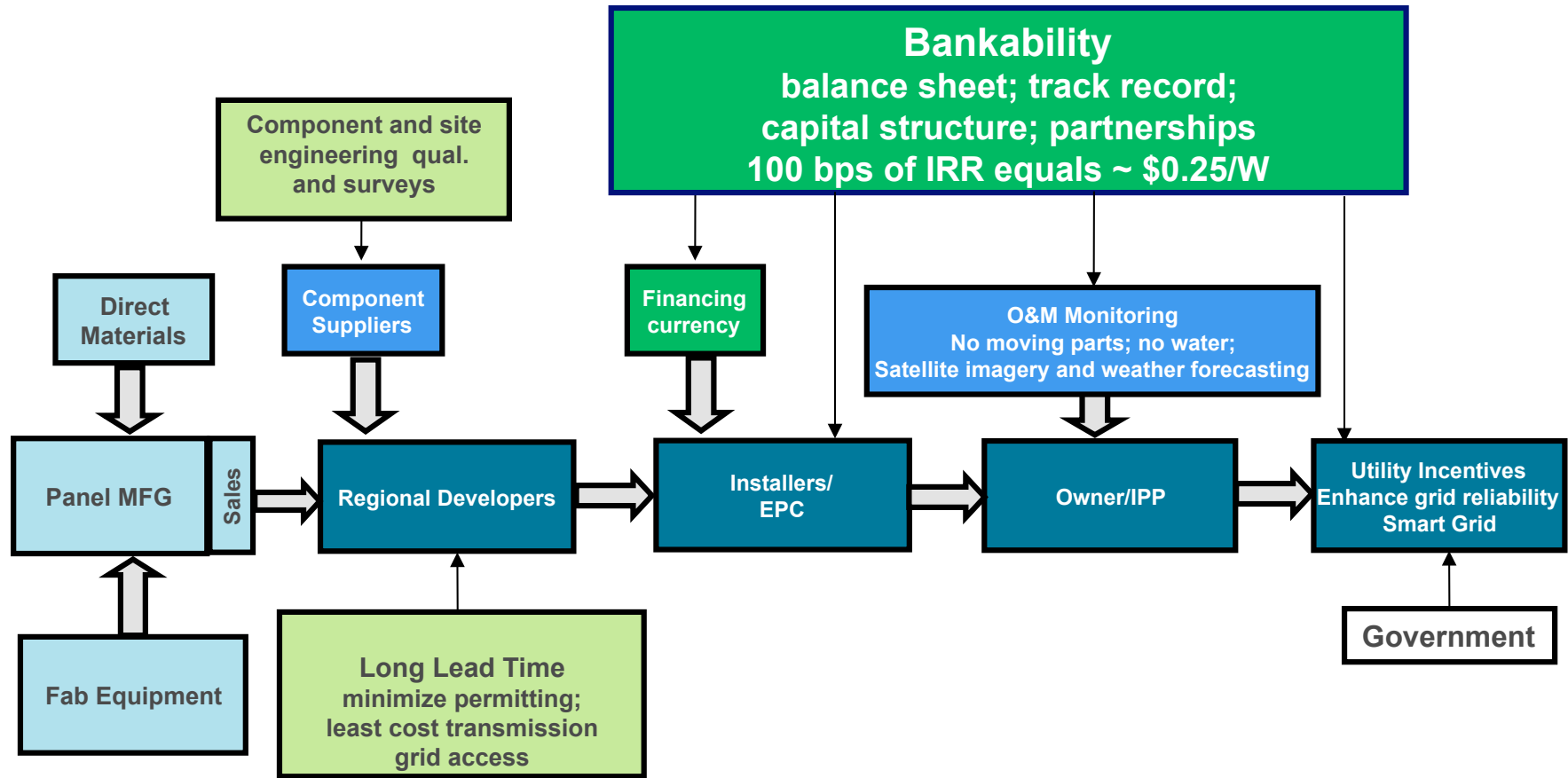
PV Economics: Attractive IRR



Notes: IRRs incorporate changes in FiTs /incentives
System price reduction from January 1 to December 31

Sources: Photon Consulting, iSuppli, EIA, and Applied Materials

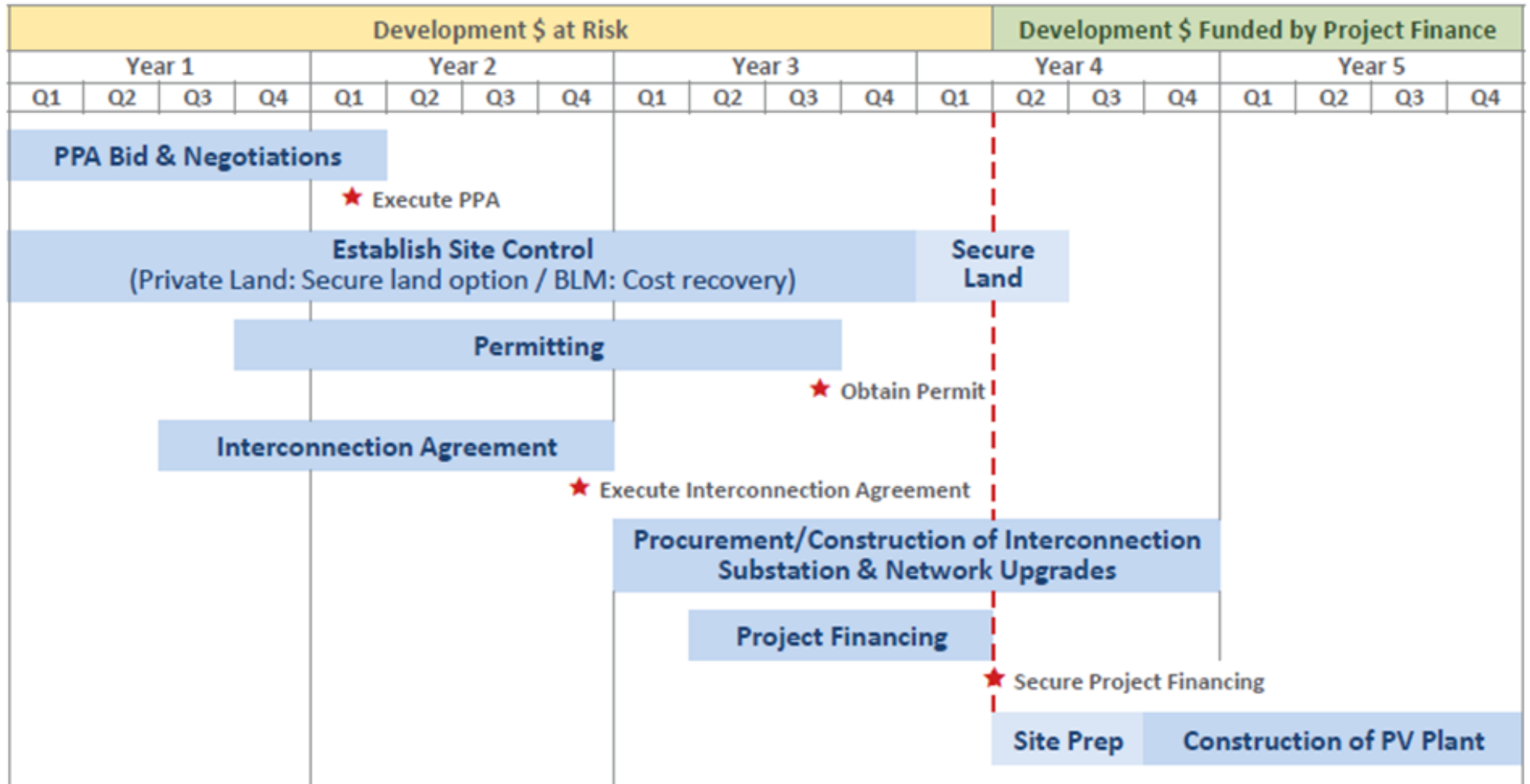
PV Power Plant Value Chain



Transparency is a Necessity

R 69
G 153
B 195
R 220
G 220
B 220
R 140
G 140
B 140
R 75
G 75
B 75
R 155
G 238
B 255
R 146
G 212
B 0
R 254
G 203
B 0
R 255
G 121
B 1
R 234
G 40
B 57
R 6
G 30
B 60

Representative PV Project Development Timeline



R 69
G 153
B 195
R 220
G 220
B 220
R 140
G 140
B 140
R 75
G 75
B 75
R 155
G 238
B 255
R 146
G 212
B 0
R 254
G 203
B 0
R 255
G 121
B 1
R 234
G 40
B 57
R 6
G 30
B 60

Power Plant Design Guidelines



R 69
G 153
B 195
R 220
G 220
B 220
R 140
G 140
B 140
R 75
G 75
B 75
R 155
G 238
B 255
R 146
G 212
B 0
R 254
G 203
B 0
R 255
G 121
B 1
R 234
G 40
B 57
R 6
G 30
B 60

Annual PV Factory Production

CAGR 2000-2010: 55%/yr

