

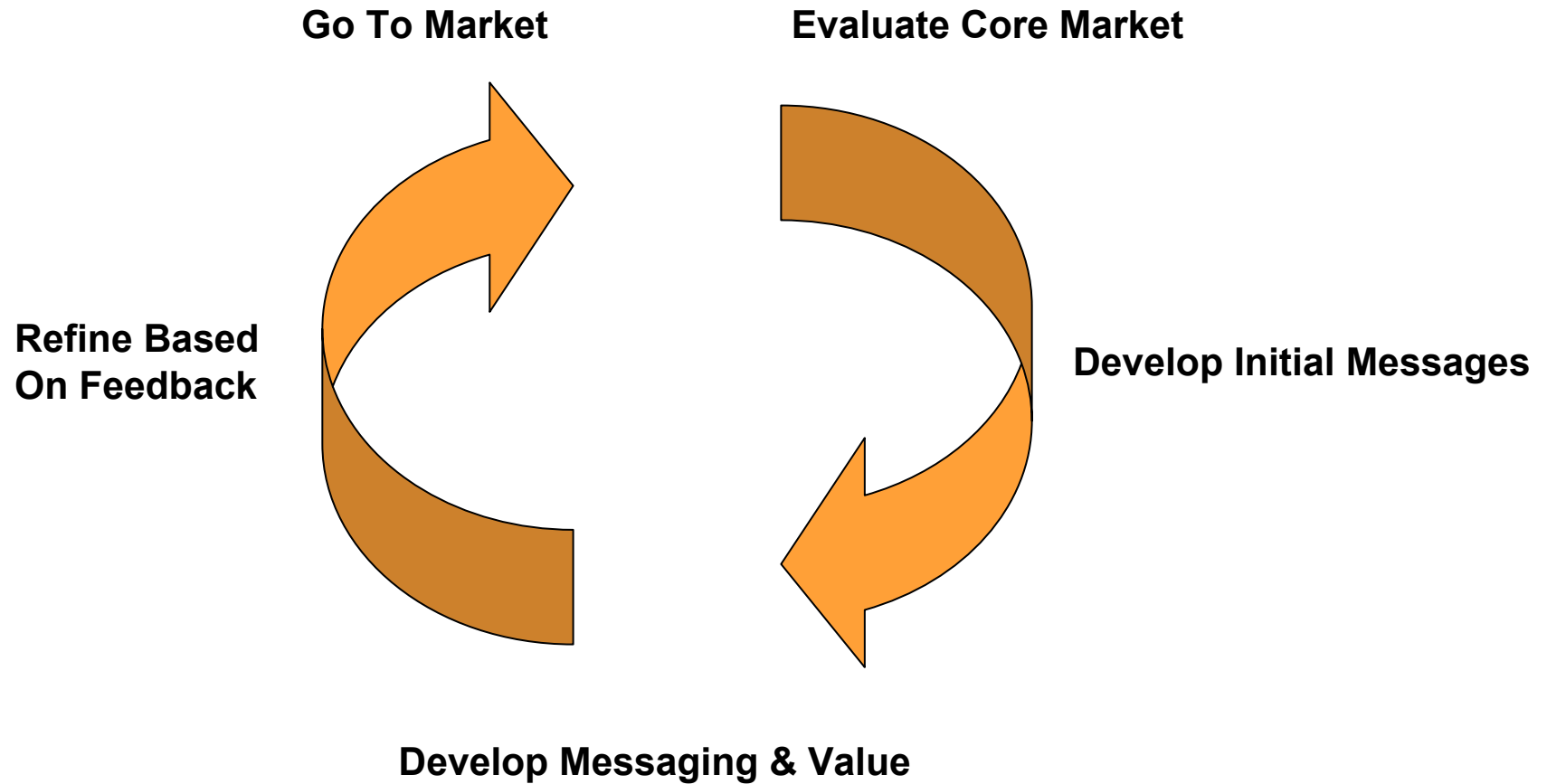


Marketing to Builders: Common Messages for Solar Adoption

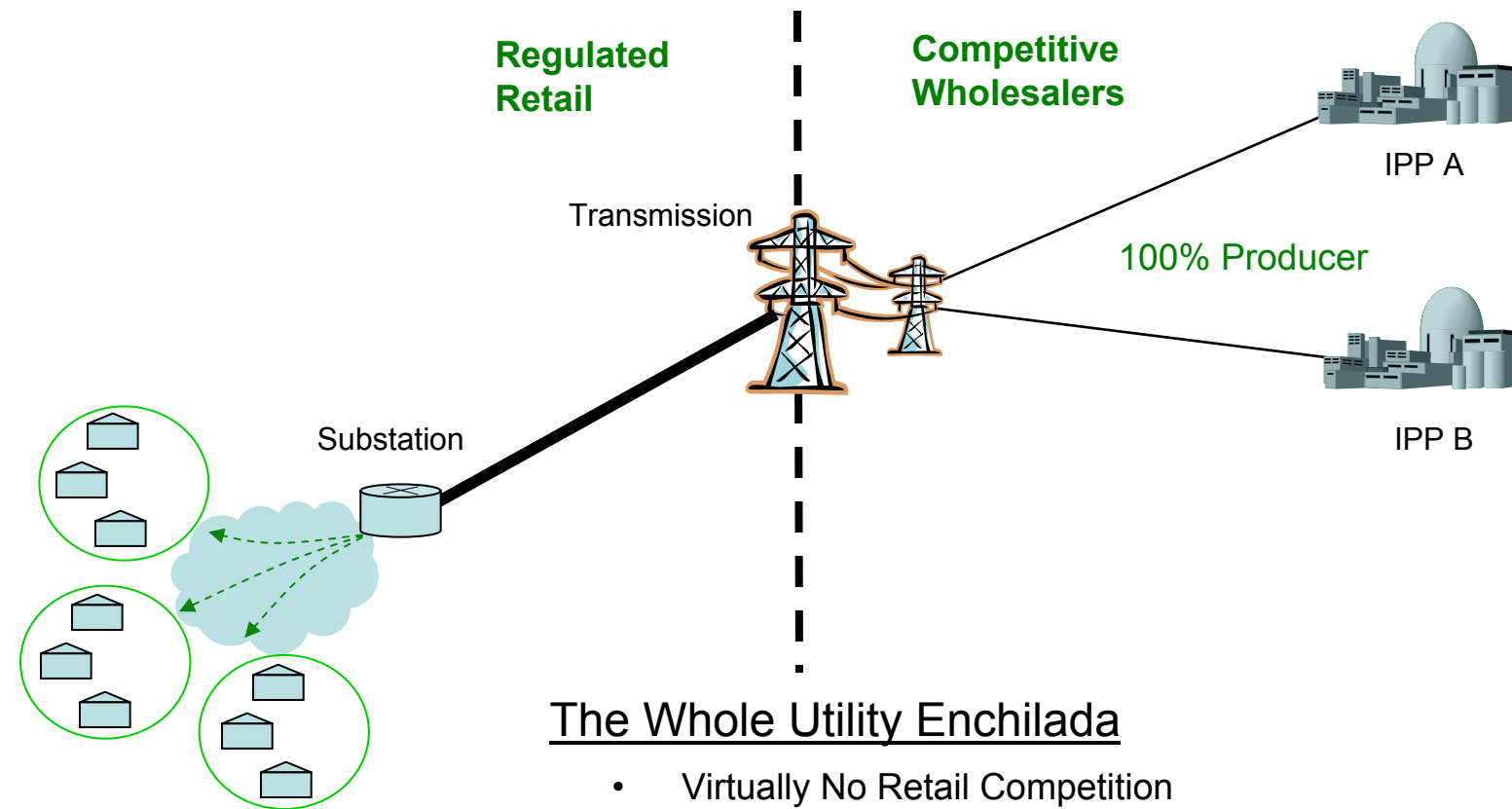
**NESEA - Boston
Mark R. Culpepper
VP of Strategic Marketing**

March 13, 08

The Messaging Process: The Discipline of Marketing



Evaluating Markets Today: Remote Power, Limited Competition, Utility Control

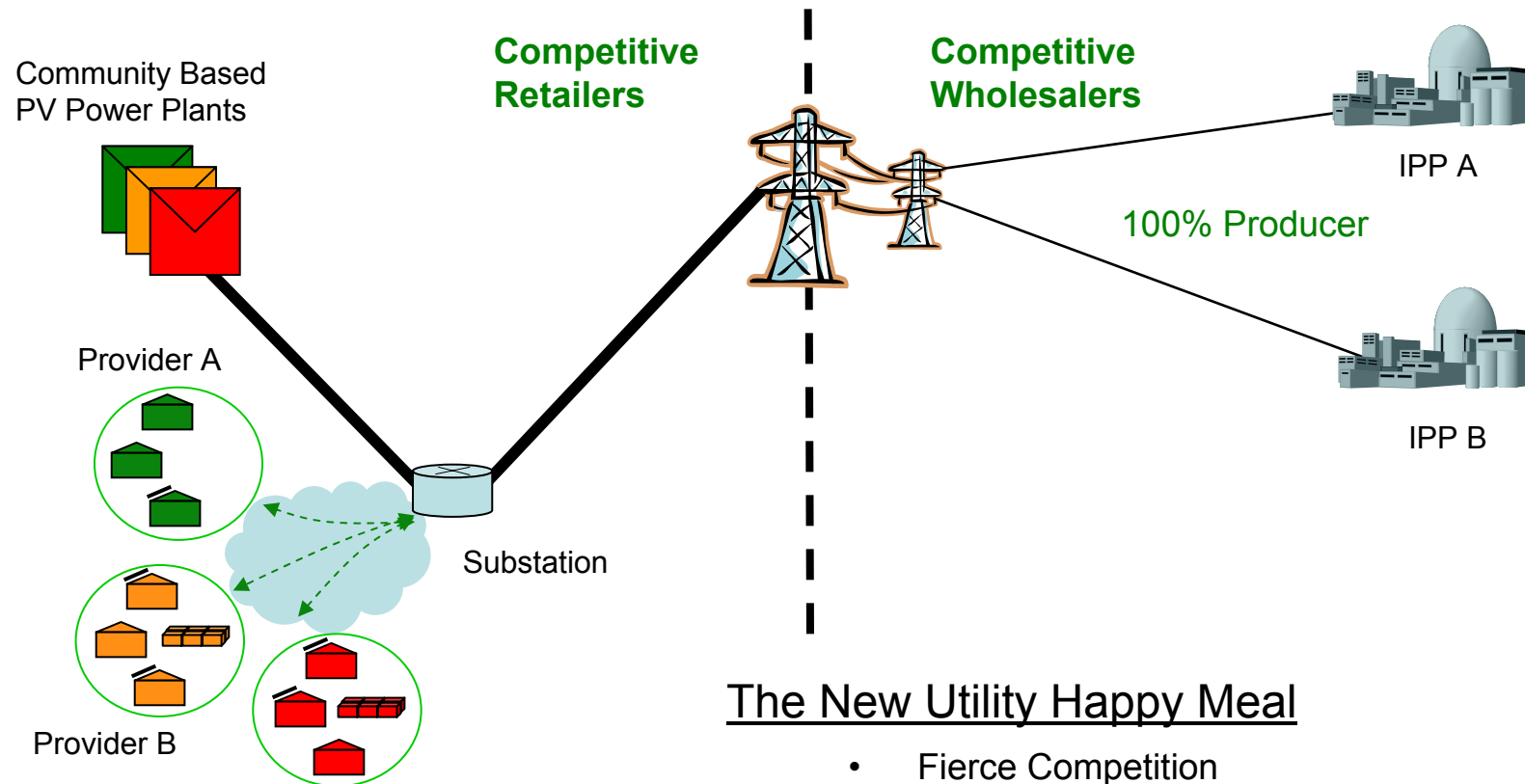


100% Consumer
• **Less Choice**
• **Higher Prices**

The Whole Utility Enchilada

- Virtually No Retail Competition
- Regulated Rates
- Customer Control
- Predictable Revenues
- “Well known” Environment

Evaluating Markets Near the End State: Competitive Offers at or Near the Point of Load



<100% Consumer
>0% Producer

- More Choices
- Lower Prices

The New Utility Happy Meal

- Fierce Competition
- Brand Dominance
- Customer Choice
- Revenue Opportunities
- Dynamic Environment

SunEdison's Market: Commercial, Government, Utility

	Commercial: Big Box & Distributors	Government: Muni's, State Ent.	Utilities: IOUs, Muni's
CRTB*	<ul style="list-style-type: none"> • Green Value • Energy Hedge • Energy Savings 	<ul style="list-style-type: none"> • Regulatory Requirements • Green Value • Energy Hedge 	<ul style="list-style-type: none"> • Regulatory Requirements • Constituent Pressure
Claim	<ul style="list-style-type: none"> • Meet Environmental Goals while Hedging Energy Costs 	<ul style="list-style-type: none"> • Leverage Fed Tax Benefits to Deliver Solar Power 	<ul style="list-style-type: none"> • Deliver Solar Power at the Lowest Possible Costs to Rate Payers
Validation	<ul style="list-style-type: none"> • EPA Green Power Partner • EX: Staples • EX: Walmart • EX: Target • EX: WholeFoods • EX: FedEx Freight 	<ul style="list-style-type: none"> • Political Endorsements • New RFPs • Uptime Analysis 	<ul style="list-style-type: none"> • Regulatory Signoff • RPS Satisfaction

* CRTB = Compelling Reason To Buy



SunEdison: Positioning In The Market

*“SunEdison is North America’s largest **solar energy service provider**, delivering **predictably priced** peak electricity that is **proven, renewable**, and compliments existing utility services. Unlike companies that sell solar equipment, SunEdison provides a **turnkey service**; we finance, own, install, operate and maintain solar power plants at the customers facility, enabling **predictable** energy costs without the high capital outlays traditionally associated with clean energy solutions. SunEdison **energy services** simplifies solar for large commercial, municipal and utility customers ”*

Pre-Survey: Proposed Thought Categories

Thought...

Solar Utility

Solar Electricity Provider

Solar Energy Provider

Solar Energy Service Provider

Solar Electricity Service Provider

Solar Service Provider

Company...

SunEdison

Pre-Survey Proposed Key Messages

Message

Service

Reliable

Affordable

Predictable

Clean

Benefit

No capital outlays

No change in downtime

The same or lower rates

Flat costs for 10 – 20 years

Demonstrable green energy

Proof

No capital outlays

Reported uptime

Monthly rates

Contracts

Solar system

Survey Results: Some Observations

	<u>...Avoid</u>	<u>...Include</u>
Key Words	<p>Clean Affordable Product Green Simple Utility Competitive</p>	<p>Renewable Predictable Service Turnkey Simplify Partnership Complimentary</p>
Marketing Tone	<p>Soft Inquisitive Informed</p>	<p>Bold Assertive Knowledgeable</p>
Message Implication	<p>“Let me educate you about this space and help you make an informed solar decision”</p>	<p>“Let me show you the way to implement a renewable solar plan nationwide”</p>

Post-survey: Bringing it all together

Tagline: SunEdison – Simplifying Solar

Key Messages:

- Turnkey** A complete service simplifying the entire customer process
- Predictable** Fixed fuel costs for the power plants expected lifespan
- Renewable** Grid connected PV power plants
- Proven** Technology agnostic, using the most reliable and costs effective PV that's stood the test of time

50 Word Summary: SunEdison is North America's largest Solar Energy Service Provider delivering turn-key, predictably priced renewable electricity services for commercial, government and utility customers without the high capital outlays traditionally associated with solar solutions. Using industry proven technology, SunEdison delivers a complete service; we finance, install, own, operate and maintain photo voltaic power plants at the customer's facility.

10 Word Summary: SunEdison delivers predictably priced renewable electricity without high capital outlays



Post-Survey: Final Thought Category

Thought...

Solar Utility

Solar Electricity Provider

Solar Energy Provider

Solar Energy Service Provider

Solar Electricity Service Provider

Solar Service Provider



Company...

SunEdison



Post-Survey Recommended Key Messages

Message

Turnkey Service

Predictable

Renewable

Proven

Benefit

Simplicity - No outlays or hassle

Flat costs for 10 – 20 years

Demonstrable green energy

Reliable w/ little downtime

Proof

Opex & implementation

Contracts

Installed system

Reported uptime

SunEdison – Marketing that drives adoption and materiality

- Technology is in place and available
- \$40 billion invested into the solar industry since 2001
- Services infrastructure is developing to meet goals of materiality
 - Investments contribute to domestic job growth versus off-shore migration.
 - 65 GW of solar additions would create 455,000 job-years
- **Where are the gaps?**
 - Regulatory and market structuring
 - Finance and site aggregation
 - Registration as a renewable resource
 - Operations and dispatch

