



SUZLON
POWERING A GREENER TOMORROW

KNOWLEDGE BOOK





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Power for development

As the world races forward on its path of development, there will predictably be a steady but certain rise in the now already overburdened energy supply.

Global electricity consumption is expected to increase by 47% by the year 2015, accelerated by developing countries, and as more and more people are able to enjoy a higher standard of living. It is estimated that by 2015, we will be confronted with a new generation capacity requirement of almost 1,271 GW. Pushed to the limit, cost of conventional energy will inevitably rise, while concerns surrounding oil and gas availability add to the uncertainty.

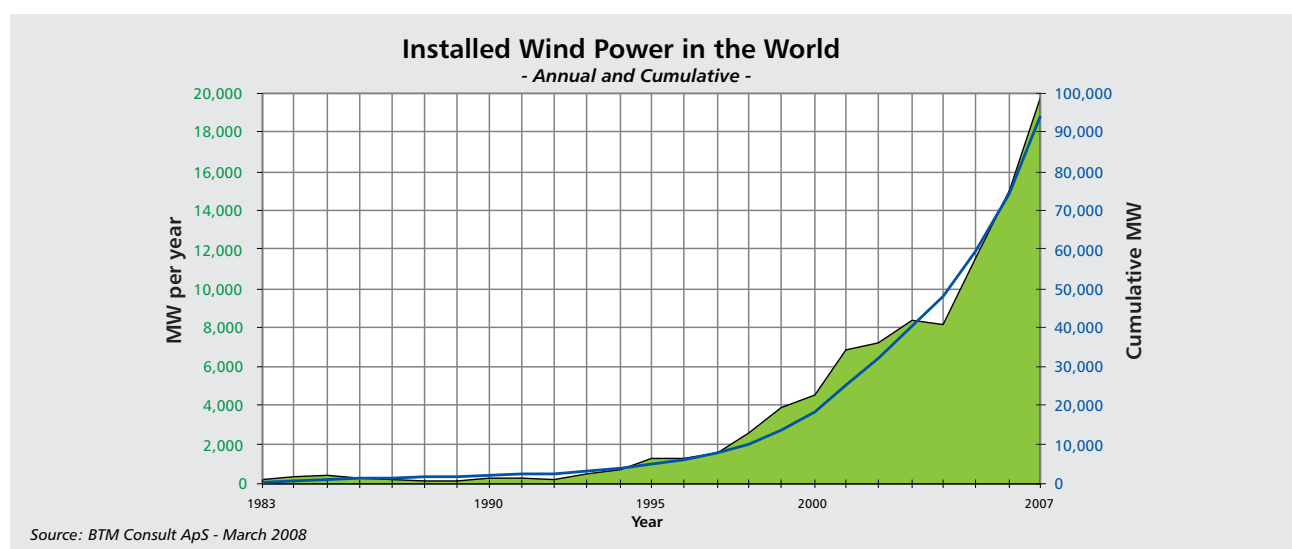
The International Energy Agency (IEA) in its World Energy Outlook 2007 estimates that the world's energy needs would be well over 50% higher in 2030 than today. China and India together account for 45% of the increase in global primary energy demand in this scenario. Both countries' energy use is set to more than double between 2005 and 2030.

The IEA estimates that this would require cumulative investment of approximately US \$20

trillion between 2005 and 2030 and more than half of this energy investment will be required by developing countries alone.

Today, wind energy has unquestionably emerged as the second largest renewable energy source, behind hydro-electric power. It is currently being harnessed by almost 70 countries of which 19 countries have already installed more than 100 MW each in 2007. Installed wind energy had touched 94 GW in the same year. By 2016 this is expected to touch a phenomenal 455 GW. It is estimated that the world wind marketplace will continue to grow at over 20% till past 2012.

Wind analysts estimate that technically recoverable wind power across the world is as high as 53,000 Terawatt Hour/year, over twice the world's energy demand projection for 2020. Wind researchers estimate that by the year 2040 wind energy could produce 3,200 GW towards meeting the world's energy needs, which by then will represent 23% of the global consumption.





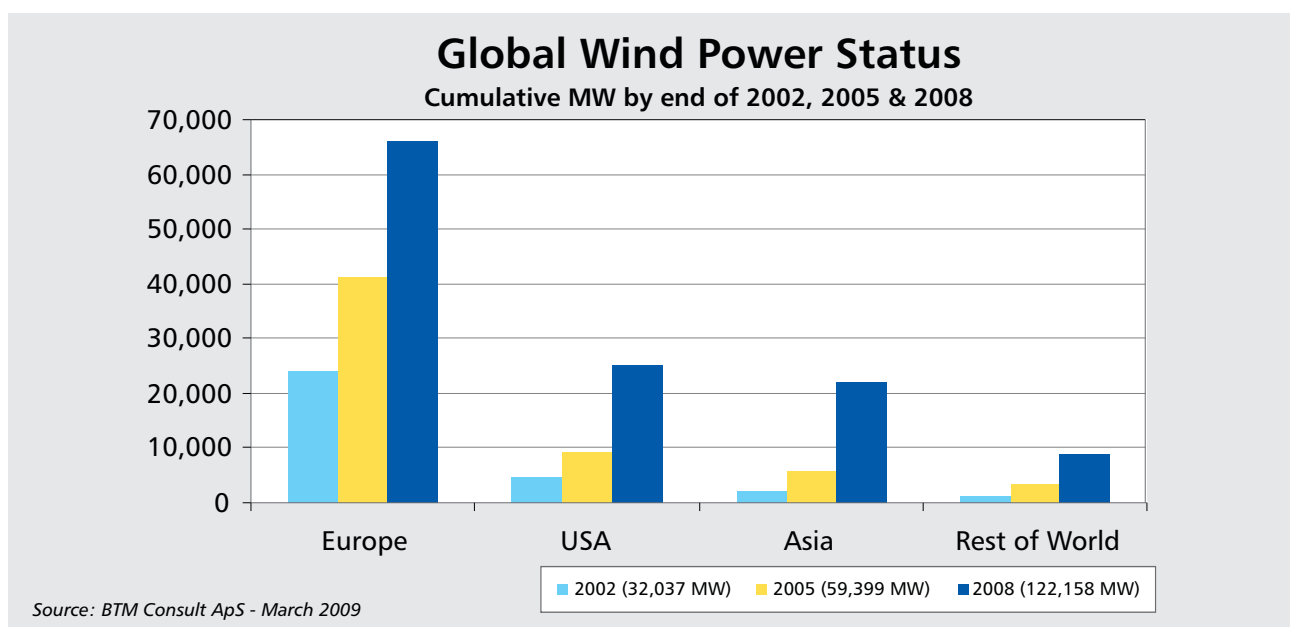
Global wind energy market potential

Wind power installations are heavily concentrated in Europe, the United States, India and China, which accounted for about 93 per cent of cumulative installed capacity by the end of 2007.

The cumulative installed capacity for wind power is expected to grow from over 122,000 MW in 2007 to 287,940 MW by 2012, representing an average growth rate for cumulative installation of over 20 percent. p.a. (Source: BTM Consult ApS: World Market Update 2008)

The penetration of wind power in worldwide generation of electricity has increased to over 1% in 2007 and projections indicate that a decade ahead, wind will provide 6% of global electricity production.

In specific areas of the world, electricity from wind energy has grown significantly. In Denmark, wind energy meets around 20% of the country's electricity consumption. In several German states the penetration of wind electricity exceeds 25%, and for Europe overall the penetration of wind has reached around 3.5%.





Indian wind energy demand

Wind power in India came to life in 1983-84. From the programs inception, the Gol has promoted a market oriented strategy which has led to commercial development of technology. The broad-based national program includes wind resource assessment activities, research and development support, implementation of demonstration projects to create awareness, opening up of new sites, involvement of utilities and industry, growth of infrastructure capability and capacity for manufacture, installation, operation and maintenance of WTGs and policy support.

India is perhaps the only country in the world to have an exclusive Ministry for Non-Conventional and Renewable Energy (MNRE). The key functions of MNRE include:

- Policy making and planning
- Program formulation and implementation
- Research and development
- Technology development and commercialization
- Promotion of demonstration and pilot projects
- Implementation of fiscal and financial incentives

The MNRE through the Center for Wind Energy Technology has an autonomous scientific research body which carries out wind resource assessment studies, pursuant to which it has revised its estimate for gross wind power potential in India upwards from 20,000 MW to 45,000 MW, assuming land availability at 1% in potential areas for wind power generation. MNRE has also been working with the various state governments as a result of which states with wind power potential have introduced policies pertaining to power purchases, wheeling and banking to provide a framework for investment in wind power.

Recent regulatory enactments in India further support the absorption of renewables in the energy mix.

The Electricity Act of 2003 requires all state-level energy regulatory commissions to ensure that electricity distributors procure a specified minimum percentage of power generation from renewable energy sources.

The MNRE and various state governments' initiatives to provide a supportive and stable policy framework for investment in wind power have contributed to the growth of the Indian wind power industry over the last four years

Seven states in India - Tamil Nadu, Karnataka, Andhra Pradesh, Rajasthan, Maharashtra, Gujarat and Madhya Pradesh, account for over 7,000 MW of wind power installations in India. As of December 31, 2007, Tamil Nadu had the highest share and accounted for 3711 MW of the capacity. Maharashtra had the second largest installations and accounted for 1646 MW of capacity. With 1,617 MW of installations in 2007, taking the countries installed capacity to 7,845 MW – the fourth largest market in the world in terms of cumulative MW. India contributed 26 % of the total new MW additions globally, in 2007 and as of end-2007 accounted for 37.8 % of cumulative MW capacity installed globally.

Key Growth Drivers

We believe that the global market for wind power has become significant due to the following factors:

Increasing cost competitiveness

A continuous focus on improving the cost efficiency of WTGs has resulted in wind power becoming increasingly cost competitive compared to



Indian wind energy demand

traditional sources of energy. Some of the factors that contribute to reduced costs are increasing economies of scale from large projects and higher capacity WTGs, as well as improved ability to obtain financing for wind power projects.

Environmental awareness and governmental initiatives

Growing concern towards global warming draws attention of governments across the globe towards renewable energy sources. As such, many countries, such as India, the United Kingdom, the United States and Germany, have provided fiscal incentives and schemes to encourage the growth of renewable energy. These incentives and schemes range from preferential tariffs or tax credits for renewable energy projects to taxing those who contribute to emission of carbon dioxide. Kyoto Protocol, which became effective in February 2005, the participating countries have agreed to a long-term reduction of their carbon-dioxide emissions by an average of 5.2 per cent per annum compared to the level of emissions for 1990, by 2012. The Protocol has been ratified by 177 countries, after a change of government in Australia in 2007.

Repowering

Repowering involves the replacement of old WTGs with new and more cost efficient WTGs. It is expected to become one of the growth drivers in relation to the future market for wind power, particularly for countries in Europe that have a large number of ageing WTG installations with relatively low capacity and outmoded technology.

Offshore Market

The offshore WTG market presents a new opportunity for wind power, especially in Europe.

Several offshore projects have commenced operations, with Denmark accounting for a majority of them. The cumulative offshore installed capacity stood at 1,421 MW at the end of CY 2007. With the introduction of larger WTGs targeted at the offshore market, significant developments are expected in the offshore market in the future. New offshore installations are expected to increase significantly over the coming years with cumulative offshore installations expected to reach 11,721 MW by 2013.



Renewable Energy Policies

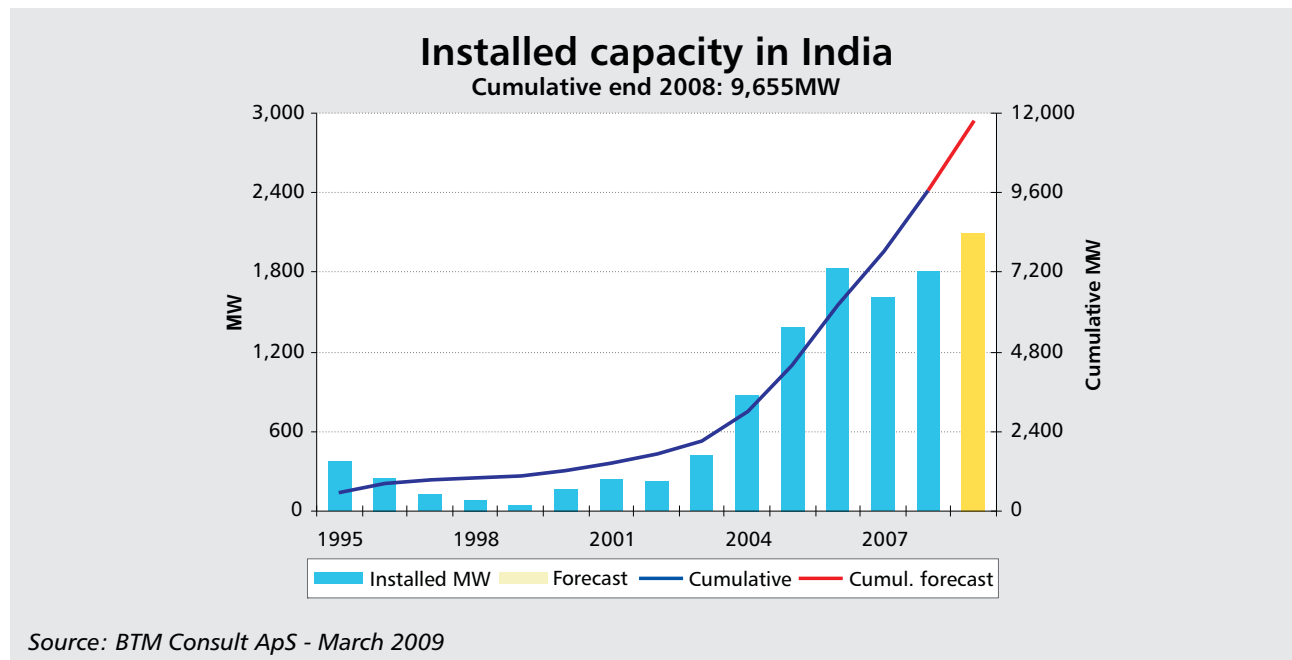
Based on the various stages of their development, different regions/countries have used different policy instruments to promote renewable energy in general and wind energy in particular. Specific emphasis has been placed on the following:

- Feed-in tariffs or Fixed tariff regimes: Major countries following Feed-in tariff/Fixed tariff regimes include Germany and Spain.
- Renewable Portfolio Standards (RPS)/Renewable Energy Credits (RECs): Over 30 countries have mandated certain percentages including the European Union, China and Australia. More than 11 states in India have also enacted RPS regulations.
- Tendering Schemes: Major countries following tendering schemes include Ireland, France and China.

- Other Incentive Instruments: Some of the other complementary initiatives are fiscal measures such as investment tax credit, production tax credit, low interest loans, loan guarantees and investment subsidies. Major countries following tax credit schemes include US, Canada (Production Tax Credit) and India.

Robust long-term visibility

Even in the midst of an overall economic slowdown, the wind sector remains one of the low-risk investment avenues. Wind power project offer long term Power Purchase Agreements with utilities, creating long term visibility for the project and cashflows, and ultimately ensuring long term security and returns on investment.





Suzlon - an overview

Suzlon's wind energy business traces its roots back to the incorporation of Suzlon Energy Limited in 1995. Suzlon has since grown to become the world's fifth leading wind turbine manufacturer with 10.5% of global market-share and the leading manufacturer in Asia and India. The company has registered 100% year-on-year growth for the past five consecutive years, achieving leadership in India and then becoming the leaders on the global stage.

Suzlon is today a leading force on the wind energy stage, generating revenues of USD 2,311 million in FY08 and supplying over 7,000 MW of wind turbine capacity around the world. In just over a decade since Suzlon was born, the company has grown to over 13,000 people around the world with operations in over 21 countries across five continents.

The company has forged ahead with an ethos of innovation in everything that it does. This has led to pioneering approaches and offerings such as a fully vertically-integrated value chain, leveraging local expertise and global experience, an 'end-to-end solutions' model and highly customized products – all contributing to make Suzlon the highest-growth, highest-margin wind turbine maker in a highly competitive environment. Suzlon's design, manufacture, Operations and maintenance services have been certified as ISO 9001:2000 by Det Norske Veritas. Our WTG models are generally accredited with type certification by either Germanischer Lloyd or CWET – an autonomous body attached to the MNRE.

Suzlon has sophisticated in-house technology and design capabilities, resulting in the development of our highly successful Megawatt and Multi-Megawatt series of wind turbines. Suzlon has also leveraged Europe's long-standing leadership in the wind energy arena by driving R&D out of centers of excellence in Belgium, India, the Netherlands and Germany.

The company's true prowess as a global giant was highlighted with two major acquisitions bids. Suzlon acquired Hansen Transmissions NV – the world's second leading wind gearbox maker – in 2006, completing its quest to integrate all critical component technologies into its value chain and create a strong, extendible supply chain to support high growth in a global supply-restricted environment.

The company in May 2007, succeeded in its bid to acquire a stake in German wind turbine maker REpower Systems AG. Suzlon, one of the world's leading manufacturers globally, marked the first major contested acquisition in the wind energy space and the third largest foreign acquisition by an Indian corporation till date. The two companies enjoy complementary strengths across products, markets and supply chain, creating potential for unlocking value, and to achieve accelerated growth for both organizations.

To strengthen its research base, Suzlon has entered into an agreement with REpower, founding the Joint Venture "Renewable Energy Technology Center GmbH" (RETC) in Hamburg, in which each firm holds a 50% stake. The aim of the RETC is to combine forces and to cooperate strategically in the field of research and technical training in the future. The facility, envisioned as a Center of Excellence, will function as a hub and integrator for Suzlon's R&D efforts around the world. The center, in addition to building on the expertise of our people, will forge relationships with universities and research institutes, certifying agencies, suppliers' et al.

Suzlon has moved rapidly to capitalize on this global opportunity, becoming a company that will not only help shape the energy sector of tomorrow but also play a role in the shaping of the future global



Suzlon - an overview

economy. However, Suzlon's greatest contribution is yet to come and lies outside of mere numbers. Every Suzlon wind turbine installed represents a vision that is one step closer to reality. A vision of a world safe from the perils of climate change; where economic progress betters the lives of all people while preserving the well being of all life and of our only home – Earth.

Suzlon's Markets - India and Around the World

Suzlon, in India, is an integrated wind energy solutions provider. It offers the entire gamut of solutions starting from wind resource mapping, land acquisition, technology development, turbine manufacturing, EPC projects and completing the chain with operations & maintenance services.

In the international markets, Suzlon is a pure turbine supplier, since site development and related services are in most cases carried out by independent project developers.

Suzlon's focus is on the major wind energy markets of India, China, USA, Australia and emerging markets of Europe and the opportunities in those markets are given below:

India

India today is the world's 5th largest market for wind energy in terms of annual installations with a global market share of nearly 8%. India added 1,810 MW of wind power in 2008 taking its cumulative installations to 9,655 MW. India is projected to be one of the key promising and emerging markets of the future. The cumulative installations are estimated to reach over 22,000 MW by 2013.

Suzlon has been a market leader in India for the last 9 years consecutively and has a market share of over 50% in FY 2007-08. And the primary customers of your company include corporates, power utilities and state nodal agencies.

China

With a landmass of 9.56 million square kilometers and 32,000 km of coastline, China has a rich wind energy resource with great development potential. China's remarkable growth over the last five years has led to rapid increase in energy demand especially renewable energy with the growing concern of climate change. China's national target for wind power stands at a staggering 100,000 MW. China's installation in wind energy was 6,246 MW in 2008 taking its cumulative installations to 12,121 MW. Suzlon has established a dedicated 600 MW integrated wind turbine manufacturing facility in the Tianjin region of China, to cater to the high demand for wind energy in the country.

USA

USA is the fastest growing wind energy market in the world. USA has become the top country in terms of new annual installations. Currently, the total installations stand next to Germany at 25,237 MW and it is expected to cross over 60,000 MW by 2013.

Suzlon began its foray into USA in 2003 and has set up a dedicated rotor blade manufacturing unit in Pipestone, Minnesota, which started operations in September 2006.



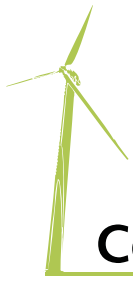
Suzlon - an overview

Europe

Europe currently is the largest market for wind energy in the world. It has a total installed capacity of 65,971 MW by the end of 2008. The incremental installations in Europe are expected to cross 145,000 MW by 2012, making it crucial for Suzlon to be present in this geography to capitalize on this opportunity. Suzlon has a well established presence in Europe, and has expanded into emerging markets like Portugal, Romania and Italy.

Australia

Australia has an installed capacity of 1,587 MW and cumulative installations are expected to rise to nearly 4,500 MW by 2013. Suzlon has established a presence in Australia to lead its business activity in the geographies of Australia and New Zealand.



Competitive strengths

Suzlon has always demonstrated its ability to capitalize on its strengths and grow in a highly competitive market dominated by established players. Some of the company's key strengths are as follows:

Strong management team:

To support Suzlon's ambitious growth plans, the Company has undertaken several steps to strengthen its management, bringing on board senior leaders with expertise in various business domains and global management experience.

Global production platform and access to an integrated manufacturing base:

With production facilities in India, China, United States and Belgium (Hansen Transmissions), Suzlon has created a global production platform for supply to the key growth markets. Growing in a supply restricted environment, the Company has established a fully vertically integrated supply chain, with the capability to manufacture all key components, such as rotor blades, generators, control panel and towers, in-house. The company has also driven its backward integration strategy a further level, by establishing forging and foundry facilities for components used in WTGs components.

Delivering enhanced value chain in wind energy markets:

Suzlon's business model has evolved to an 'integrated solutions' package for wind energy projects. Suzlon's key activities include :

- (a) designing, developing and manufacturing WTGs
- (b) wind resource mapping
- (c) identifying suitable sites for wind farms
- (d) coordinating with its associate companies in the acquisition and development of these sites and installation of WTGs

- (e) providing after-sales O&M services

This business model allows Suzlon's customers to benefit from the cost-efficiencies and economies of scale Utility-scale wind farms can offer. Suzlon's expertise in O&M has also added value in enhancing the performance of WTGs under operational conditions. Suzlon gathers real-time data relating to the WTGs enabling online turbine performance management even from remote locations. Suzlon's R&D teams leverage the operational data gathered to constantly improve upon the current WTG models.

In-house technology and design capabilities:

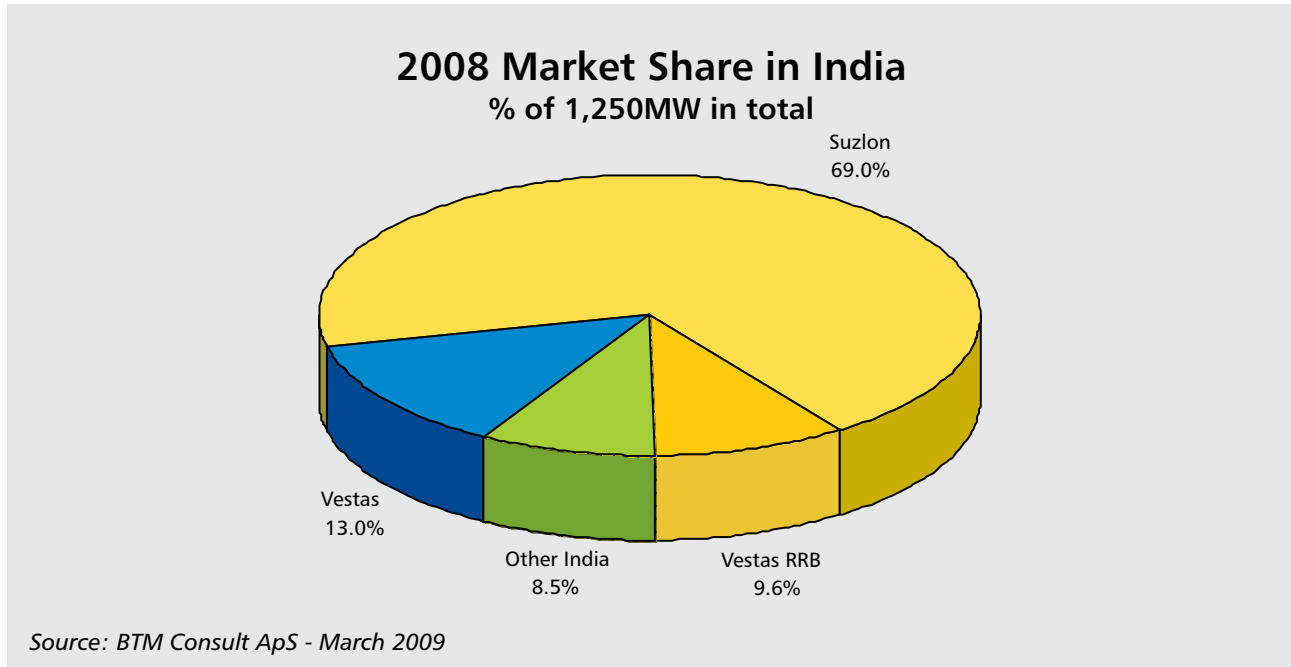
Suzlon has driven a sophisticated R&D program to develop a comprehensive product portfolio, ranging from sub-MW and multi-MW turbines. The Company has followed a 'best of all worlds' strategy to technology development, harnessing Europe's expertise in turbine and component research, aerodynamics development, and leveraging expertise in India for process engineering. Suzlon currently drives its R&D program out of centers in Belgium, India, Holland and Germany harnessing processes and technologies to develop wind power solutions customized to meet the needs of the world's wind markets.

Market leader in India and significant presence in several other high growth markets:

For the last nine fiscal years, Suzlon has been the leading WTG manufacturer in India with a market share of over 50 per cent of the total capacity installed in India in 2007, with India being the fifth largest wind power market in terms of annual installed capacity during the same period (Source: BTM Consult ApS: World Market Update 2007). Suzlon has over the last four years established a significant presence in key wind markets such as China, Europe and the United States; with the US forming the largest market for the company outside India.



Competitive strengths





Business strengths

MANUFACTURING AND VERTICAL INTEGRATION

The global wind energy industry is today characterized by high demand, but hampered by a growth-limiting supply restricted environment. The steady growth of the industry over the past years has led to a significant increase in the demand for critical components and raw materials, while the supply has not kept pace. However, Suzlon has consistently grown at a better-than-industry-average, growing by more than 100% every year for the past four consecutive years.

Suzlon saw the challenge early on and adopted a visionary strategy, setting forth to become the most vertically integrated wind turbine maker in the world. We embarked on a journey to develop leading edge technology and build manufacturing capabilities and capacities for all key components.

This vertical integration drive has created the capability to manufacture all key components including tubular towers, gearboxes, generators, rotor blades and control systems.

This capability has allowed us to match an accelerating demand and has geared us to leverage this global opportunity. In the past year, we have increased our manufacturing capacity from 1,500 MW to 2,700 MW annually during FY2006-07; and our plans to increase manufacturing capacity further to 5,700 MW nearing completion.

Our SCM division was further augmented this year with an overall objective of ensuring a timely and cost-effective delivery ensuring the quality of raw materials and components. This was done by initiating a Supply Chain Transformation program that will entail implementation of LEAN Manufacturing practices in manufacturing and procurement.

R&D AND TECHNOLOGY

At Suzlon we strive to leverage the best technology to create products that deliver high performance and reliability in the toughest and the most diverse operating environments. With world-class design and R&D teams, and state-of-the-art facilities in Belgium, Germany, India and the Netherlands, our R&D team is a potent combination of global experience of varied wind regimes and geographies and an in-depth expertise of leading edge wind turbine technologies.

This enables us to produce some of the most efficient, robust and reliable wind turbines available in the world today. Combining ever increasing levels of wind energy conversion and transmission efficiency with high power quality and long-term, low maintenance operation, we offer tangible competitive benefits to our customers, ensuring maximum return on their investment.

Over the years, our drive to develop wind power solutions customized to meet the needs of specific geographies and environments has seen result in a product portfolio of wind turbines ranging in capacities from 600 kW to 2.1 MW. Suzlon also recently added to its portfolio two turbine models designed for maximum performance in the medium to low wind regimes the 600 kW and 1.5 MW machines.

Suzlon wind turbines are manufactured as per the industry's highest engineering standards. Constant innovation, driven from extensive operational experience and feedback from operating wind farms, has resulted in the development of highly reliable and technologically superior wind turbines - customized to meet the needs of varied customers around the world.



Business strengths

THE LEADING EDGE

It is our mission to serve the world's energy needs efficiently and in an environment friendly manner and to continue our journey on the path of achieving our vision of technology leadership. Our approach to technology is one of constant innovation, geared towards developing new market defining products and constantly improving on existing products and technologies. Put simply, "We are because we innovate".

We are currently conducting feasibility studies on various projects, such as, load control strategies, usage of thermoplastics in blades, concrete-steel hybrid towers, seamlessly integrating into conventional power project SCADA systems, application of super conductivity in electrical generators and application of nanotechnology to name a few.

THE FUTURE OF WIND POWER TECHNOLOGY

At Suzlon, we harness the 'best of all worlds' in all areas of our operations. Taking that philosophy forward to the technology arena, we have invested in leveraging the expertise of traditional leaders in every domain.

As of a result of this approach, we drive our gearbox technology program from Belgium, engineering in India, turbine technology development in Germany and aerodynamics in the Netherlands.

We have established futuristic R&D centers-of-excellence; including the new state-of-the-art Technology Centre in Hamburg, Germany which will function as the nerve centre for Suzlon's global technology program.

With our renewed R&D program, Suzlon is well poised to drive the development of the next generation of wind turbine technology contributing to creating more efficient and reliable wind power solutions for the world.

QUALITY, ENVIRONMENT, HEALTH & SAFETY (QEHS)

At Suzlon, we believe that having systems to meet and even exceed environment and safety compliances is the very baseline for doing business. Also, the rigorous pursuit of quality can be one of the key vehicles that will take us from being a good organization to a great one.

More than for benchmarking our product and output, we believe that quality serves to act as a guiding light for the organization's bigger goal of sustainability over time.

The year has witnessed the integration of the three management systems - Quality, Environment and Health & Safety into one comprehensive system, directed towards focused auditing expertise and reduced management review time, in other words a 'one product, one system' concept.

At the heart of each of the Quality, Environment, Health and Safety (QEHS) Management Systems is Risk Management. Risk in the three management systems is traditionally measured independently: Quality Failure Mode and Effect Analysis (FMEA), Environment Aspect Impact Risk Assessment and Hazard Risk Assessment. Our drive for the coming period will be to work forward from the 2006 integration and develop a hybrid measurement system, combining risk priorities into a single scoreboard. This in turn is expected to further broaden our vision of 'sustainability' over time.



Business strengths

We have achieved an across-the-company single ISO 9001 certification during the joint re-certification audits of September 2006. This has replaced the independent company certifications of the different segments leading to a successful synergizing of the supply chain. This initiative followed Suzlon's double certification to ISO 14001 and OHSAS 18001 in April 2006. Our growth this year can therefore be measured in terms of knowledge and the value of common understanding.

LOOKING FORWARD

Just as the horizon is opening, the value of inward reflection has become all the more critical to our success. World-class supplier approval, qualification and evaluation guidelines, streamlined process control structures, leveraging information systems and industry specific qualification programs are direct results of this soul searching, as well as, the source of concepts for better system sustainability.

HUMAN CAPITAL

At Suzlon we recognize that our human capital is our prime asset; and over the last decade we have built among the most successful teams on the wind energy stage by attracting and nurturing some of the best talent in the industry.

The has always believed in going to the places from where it can get the best human resources. Put simply, we have leveraged our approach of harnessing of the 'best of all worlds' by securing the best of local expertise and global experience to help us fuel our superlative growth.

Over the past year, we have grown from strength to strength not only in our revenues but also in the strength of our talent pool. Today we are a team

that's over 13,000 strong; spread over 5 continents and drawn from over a dozen nationalities, a truly multi-cultural and multi-ethnic team sharing a high performance culture.

Our people success story stated can be quite simply explained through our philosophy to integrate the company and its people into wholesomeness and to be competitive enough to bridge the past, present and the future with a common thread.

This has established a culture that promotes meritocracy. As a part of this culture, we have created a comprehensive performance management system and compensation & benefits framework for the employees. This in effect encourages a uniform, high performance environment that inspires our employees to grow everyday. This has not only motivated employees to have bolder aspirations but has also offered them sufficiently challenging roles which has help them excel to newer heights in their career growth. This has lead to increased employee bonding with the Company and a visible change in the energy levels in the organization as a whole.

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One of the Group's most important people event is 'Sumilan' this is a group-wide annual celebration; wherein employees at all level are felicitated and recognized for their superlative performance by duly awarding them. Sumilan is built on three pillars-Sammaan, Samwaad and Sugati. Sammaan is built



Business strengths

around recognizing the role, value and contribution of the people, Samwaad drives open, transparent and productive dialogue across all functions, geographies and people and Sugati outlines our road map on the path of true progress and achievement.

People development and talent retention is a way of life at Suzlon. This is systematically followed through various learning and development initiatives and by awarding challenging assignments. The organisation is building alliances with key universities to strengthen the curriculum as well as establish sustainable partnerships to source the best and the brightest talent. Steps are also being taken to further strengthen employee engagement and ensure that key people are identified and actions are taken to retain them. The focus on Management Development Programs and succession planning will increase significantly over the years to come.

Simultaneously the organisation is undertaking an assessment of key profiles that it needs to recruit to take care of the business complexities and its rising global aspirations. 'Brand' Suzlon is also taking several steps to establish its image in the minds of its prospective employees.

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The journey to develop and unlock the full capacity of our human capital will continue at a rapid pace as we face the window of opportunity in the new world arena. Group Human Resources will support and facilitate the business units to reach their ambitious and challenging targets while working together as a team.

THE ROAD AHEAD

Going forward in the new realities of our economic environment, Suzlon is working closely with all industry stakeholders to bridge the crisis in the credit markets and the overall global slowdown. While the wind energy industry will also see an impact of the slowdown, the sector's fundamentals drivers remain strong. The finite supplies of fossil fuels, the threat of climate change and policy measures to drive the growth of renewable energy, will all be key to driving steady growth in the renewable energy space – and making renewable sources a bigger part of the world's energy matrix.

