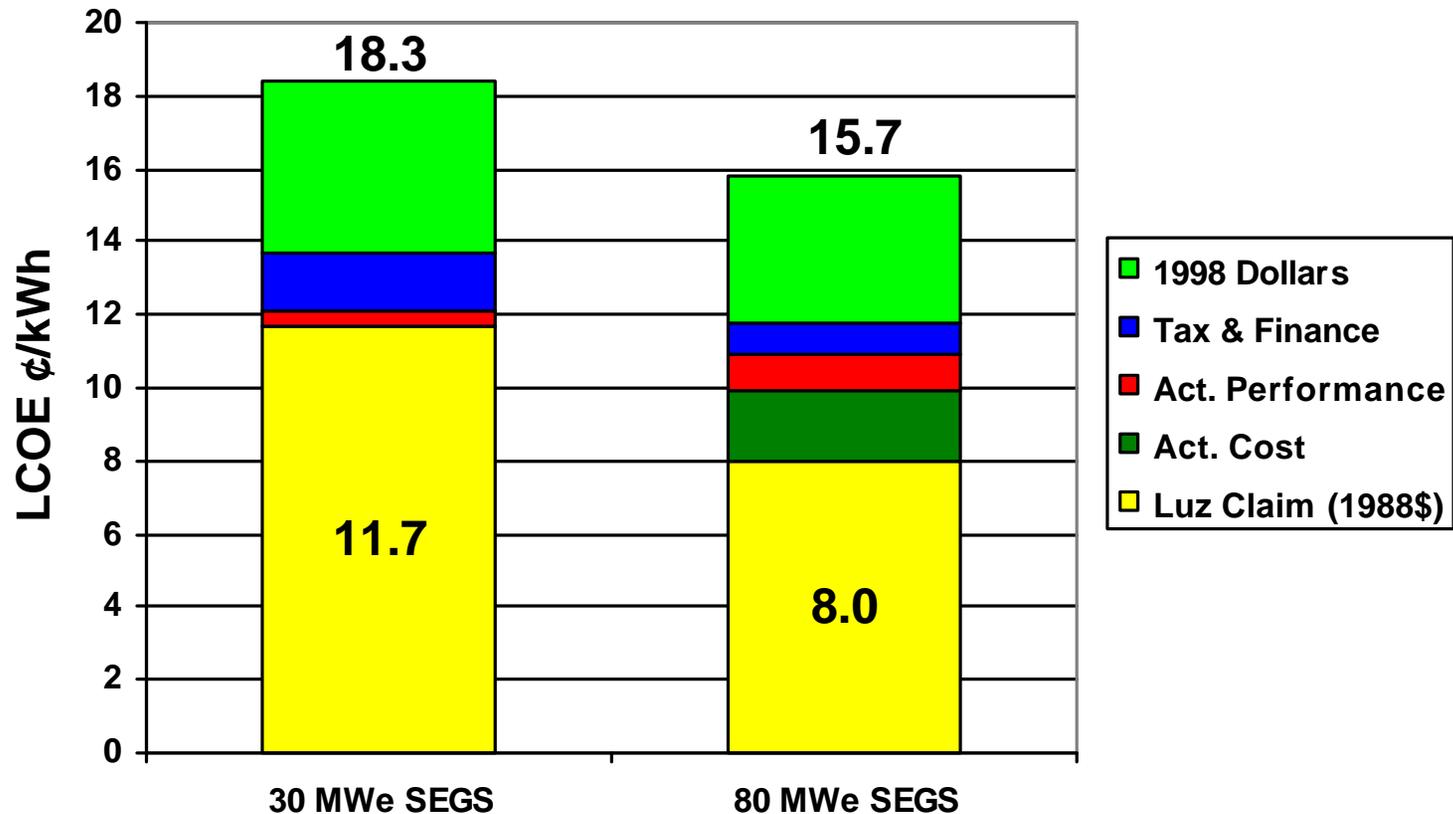




Market Development

**Concentrating the Sun's Power
to Meet World Energy Needs**

The Levelized Cost of Energy from the SEGS Plants

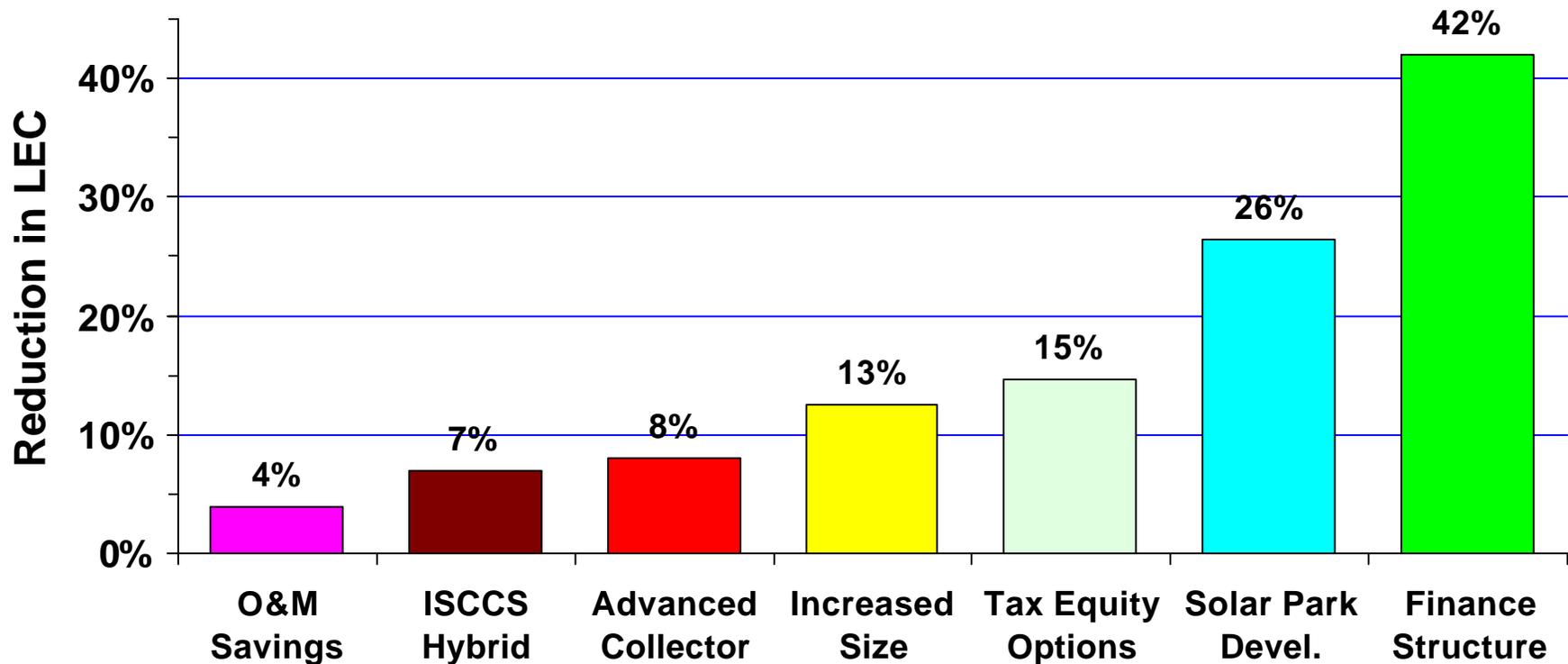


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National Renewable Energy Laboratory, Golden CO

Cost Reduction Study for Parabolic Troughs

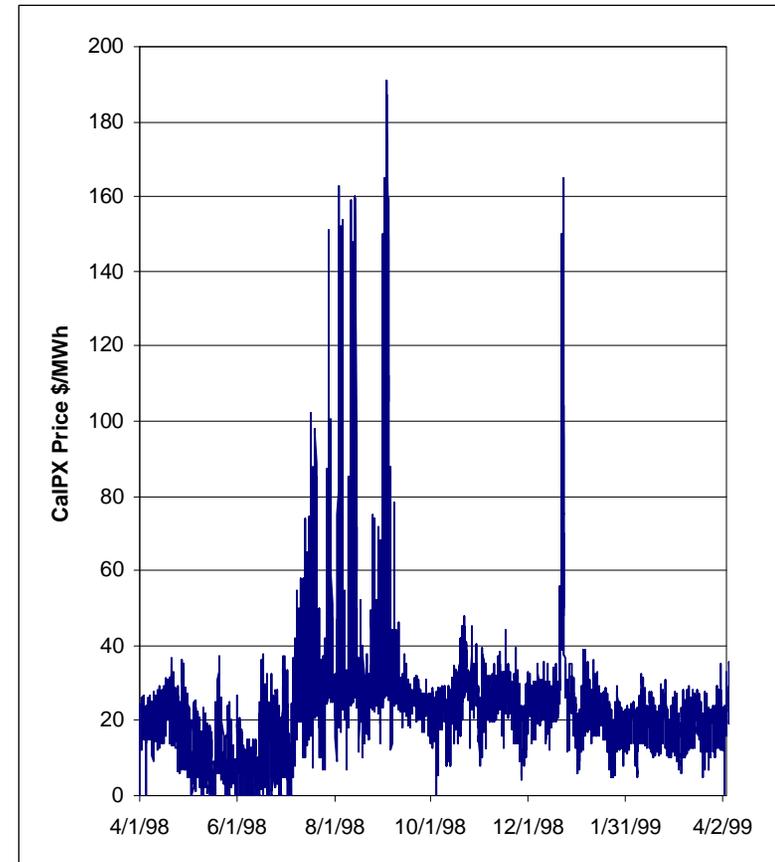


What have prices actually been in the California competitive market?

CalPX First Year Prices

0 - 19 ¢/kWh

- Average **2.4¢/kWh**
- Solar **2.9¢/kWh**
- w/Hybrid **3.1 ¢/kWh**



Treating Fossil Fuel as a Capital Cost

Case 1

- Efficient combined-cycle plant
- Fossil fuel treated as expense
- 30 year project life

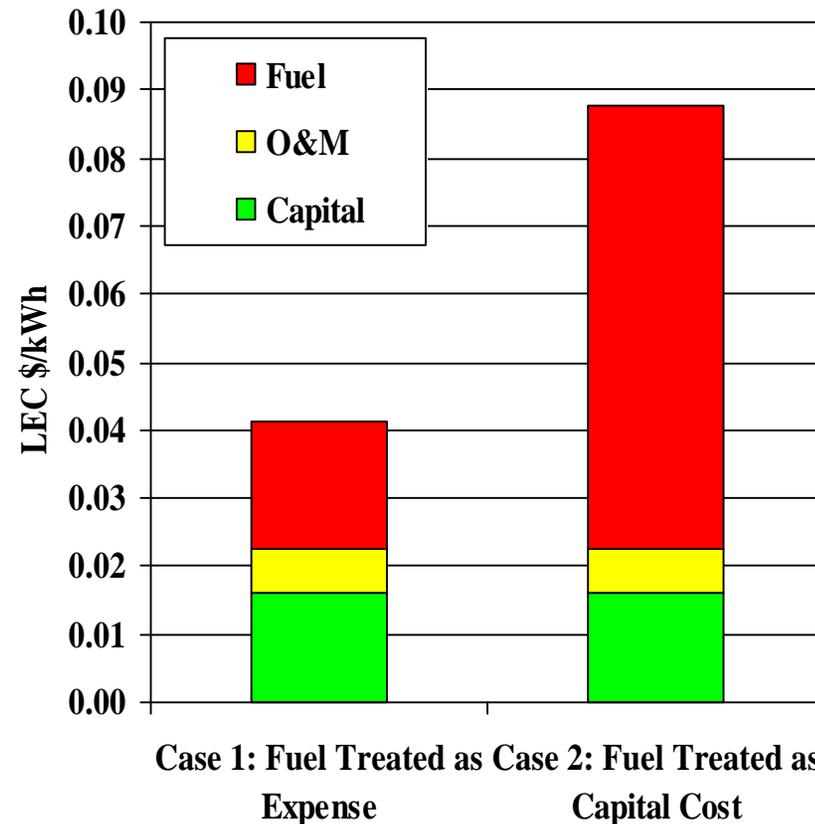
Case 2

- Same plant
- 30 year fossil fuel supply treated as an up-front capital investment

Impact:

- Fuel cost increases by **250%**
- LEC more than doubles

Advanced Combined Cycle
30% CF, 6730 Btu/kWh HHV, \$2.65/MMBtu



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Breakout

- Domestic Markets
- International Markets
- Incentives - Financing/Tax/Green
- Resource Assessment
- Communications & Outreach



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