



"SWEET VIRGINIA BREEZE" = ELECTRON + JOB ANNUITY

VIRGINIA OFFSHORE WIND SUPPLY CHAIN EDUCATIONAL FORUM
DECEMBER 7, 2010

VIRGINIA



Virginia's Value Proposition for the Offshore Wind Power Industry is Compelling

Wind Generation Potential

- Shallow Water
- Strong Wind Resource
- Access to Hampton Roads

Premier Maritime Community on East Coast

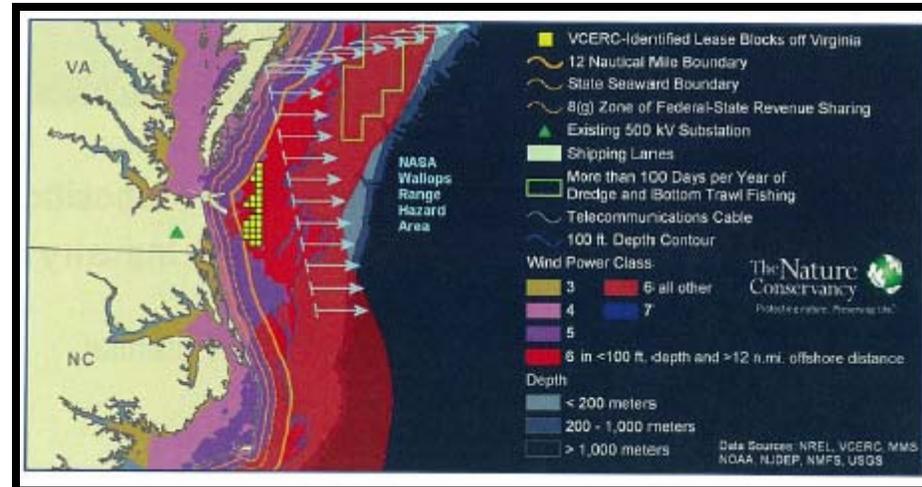
- Largest industrial military complex in U.S.
- Largest capacity for shipbuilding & repair on East Coast

Infrastructure In Place

- Natural harbor with 50 ft channel depth
- No height restrictions in harbor
- Abundant and cost-effective lay-down space
- Central Mid-Atlantic location
- Direct access to rail
- High voltage transmission infrastructure close to shore and fully operational

"Offshore-Wind-Ready" Workforce

- Over 200 companies employ more than 44,000 linked to the supply chain
- 13,000 trained personnel exit Virginia military bases each year



Only a few locations can guarantee the right combination of resources that are crucial to your business's success. Virginia is one of those locations.

The Commonwealth of Virginia's unique combination of assets has encouraged businesses to prosper here for more than 400 years.

Like you, they searched the world over for that convergence of resources that would help ensure their prosperity.

For them, their search ended here. Chances are yours will too.

For more information,
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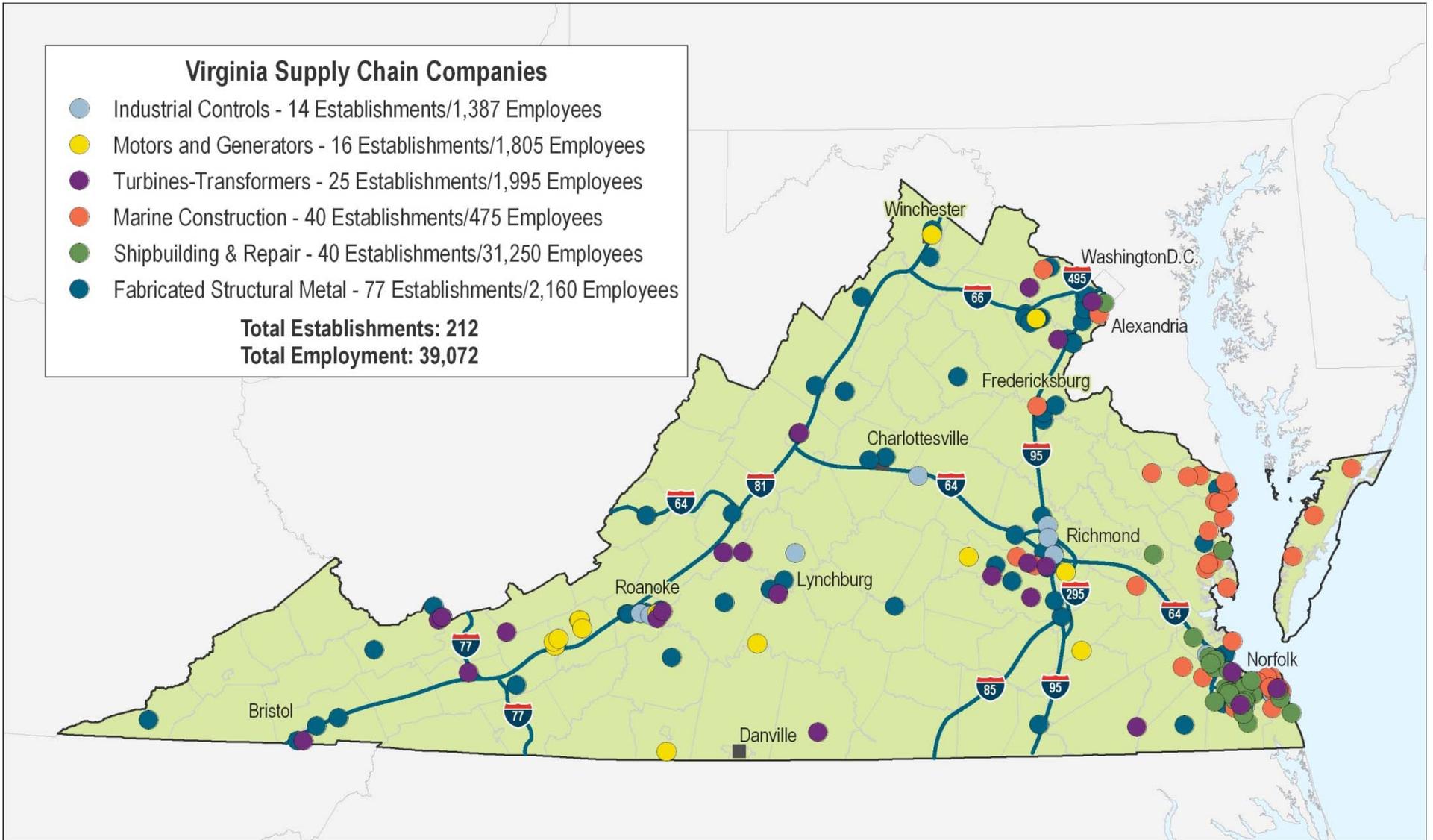
EDUCATIONAL TRACKS

- Educational Elements in the Forum Agenda include:
- Virginia's wind power generation potentials; onshore and offshore.
- Virginia's premier maritime community and its role in supply chain dominance.
- Virginia's other **wind** infrastructure assets of direct value to the supply chain epicenter.
- Virginia and federal permitting gates to pass through.
- Job creation and state Gross Domestic Product impacts from Virginia offshore wind. Offshore Wind cost challenges.
- Virginia Offshore Wind Coalition's role and leadership in supply chain development.
- Major Wind OEM supply chain leader presentations.
- Virginia workforce development training and university R & D in wind energy.

Virginia Supply Chain Companies

- Industrial Controls - 14 Establishments/1,387 Employees
- Motors and Generators - 16 Establishments/1,805 Employees
- Turbines-Transformers - 25 Establishments/1,995 Employees
- Marine Construction - 40 Establishments/475 Employees
- Shipbuilding & Repair - 40 Establishments/31,250 Employees
- Fabricated Structural Metal - 77 Establishments/2,160 Employees

Total Establishments: 212
Total Employment: 39,072



Potential Off-Shore Wind Energy Supply Chain Companies in Virginia



Sources: VEDP 2010, ESRI 2009, VEC 2010, QCEW 2010
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RECENT DEVELOPMENTS

- October 5 – Virginia partners (VOWC, HREDA, VEDP) exhibit and host at AWEA Offshore Wind Conference in Atlantic City, NJ.
- October 6- Secretary Salazar announces first offshore wind lease for Cape Wind-MA.
- October 6- Gamesa and Northrop Grumman announce multi-year collaboration to develop and deploy new Gamesa 5.0 MW offshore wind turbine models. VA-based.
- October 12- Google and other investors announce vision for The Atlantic Connection, a 350 mile underwater spine to support offshore wind and power transmission.
- November 23 – Secretary Salazar announces new “Smart from the Start” plan for expediting offshore wind regulatory and environmental permitting gates.
- November 23- Governor McDonnell issues press release in full support of the DOI actions.