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What Does 2013 Hold for Solar? Predictions From Four Green Money Managers

What will the New Year hold for Clean Energy?

For the people who manage clean energy portfolios, mutual funds, and indexes the question is more than idle curiosity. Getting the answer right means finding the stocks which will put a shine on your solar portfolio's returns. Getting it wrong means the competition will blow away your wind stocks.

I asked my network of green money managers what they thought, and they gave me a lot more than I expected. This is the start of a series on the predictions and stock picks from my panel. This first article focuses on what they had to say about trends in the solar sector.

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Rob Wilder: Three Potential Catalysts

Dr. Rob Wilder is Index Committee Chair for WilderHill Clean Energy Index (ECO), the first to capture and track this sector. ECO underlies the PowerShares WilderHill Clean Energy ETF (NYSE:PBW.)

Dr. Wilder prefers not to make outright predictions, but he shared three possible trends he expects would have large impacts on the solar industry, if they emerge. He notes "Solar hardware costs too have seen a great fall from poly to panels. But what resisted coming down are the 'softer' costs of solar like the permitting, balance of system in installation: we pay far more than Germany to install solar." Bringing down these other costs would have a large impact on the solar industry.

He also thinks that quickening industry consolidation or increased "subsidies in places like China and India" which could lead to "gigawatts more solar in just the next couple years."

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