This year has seen big changes...
National Advocacy

NHA successfully turned these changes into significant opportunities for hydropower.
Watershed Moment

Policymakers recognize hydro as a tool for meeting our national energy, economic, and environmental priorities.
Federal R&D Funding

Decade-high appropriation level

$0 (2005)

$50M (2009)
Production Tax Credits

In-Service Extended 4 Years

2005 2009 2013
Clean Renewable Energy Bonds

$530M in allocations
Investment Tax Credits

For generators & manufacturers
Federal Grants

In lieu of tax credits
$32M in Stimulus Package
For modernization
New funding opportunities

For ocean, tidal, and instream hydrokinetic
Federal funding growth

2010: $600M+ for hydro

2005: $0 for hydro
Watershed Moment

“I’m for hydro, because I’m an environmentalist.”

—Energy Secretary Steven Chu
3/24/10
DOE, DOI, Army sign MOU

Agreement to speed hydro development
NHA reaches target audiences with messages that support sound hydro policy and development.
The results validated our goals. And more...
Hydro Job Creation

Direct, indirect & induced jobs

1.4M jobs (2025)

300,000 jobs (2010)
Hydro Capacity Growth

Hydro can more than double...

100 GW Today

200+GW After 2025
Using the Findings

NHA used study findings to promote the industry:

• Outreach material
• Hill outreach
• Media briefings
• Energy trades work
• Member support
Watershed Moment

NHA media inquiries up 300% in the last year
Hot Hydro Media Topics

Jobs, small hydro, growth potential

Gov. Ed Rendell (D-PA)
Hydro Industry Forum

NHA offers a forum for info exchange, networking, and unified strategic policy and outreach.

FERC Commissioner Philip Moeller
Record High Membership

170 NHA Member Companies
NHA Regional Meetings

Record-high attendance
Watershed Moment

NHA holds first regional meeting in Alaska
NHA Adapts to New Needs

Small Hydro Council

Pumped Storage Council

CEO Council

Committees added 2009-10
OSAW Awards Revamped

More prestigious, targeted
How NHA Benefits You

NHA programs benefit members by advocating for policies and actions that support hydro growth.
## Adding Up NHA’s Benefits

### 2009 Initiative-Induced Results

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTC</td>
<td>$17.5+ million</td>
</tr>
<tr>
<td>ITC</td>
<td>$64.5+ million</td>
</tr>
<tr>
<td>CREBs</td>
<td>$530 million</td>
</tr>
<tr>
<td>Federal R&amp;D appropriations</td>
<td>$50 million</td>
</tr>
<tr>
<td>Lab-led projects</td>
<td>$11 million</td>
</tr>
<tr>
<td>Hydro modernization</td>
<td>$32 million</td>
</tr>
<tr>
<td>Hydrokinetics</td>
<td>$14.6 million</td>
</tr>
<tr>
<td>Industry earned media</td>
<td>$250,000+</td>
</tr>
<tr>
<td>And more...</td>
<td>Invaluable</td>
</tr>
</tbody>
</table>

NHA Benefits = $720 Million+
NHA’s 2009-2010 ROI

For every $1 invested in NHA membership, NHA returned $360+ in benefits
What’s next?

• Hydro Title
• National polling data
• Climate & energy legislation
• More incentives
• More opportunities