DEVELOPMENT OF WIND INDUSTRY IN TURKEY
I. Nordex at a glance

II. Yearly installed capacity in Turkey - Volume

III. More local content and sourcing

IV. Services for the Wind Industry in Turkey

V. Financing in the industry
NORDEX IS ONE OF THE LEADING WIND TURBINE OEMS GLOBALLY

Nordex at a glance

- Global manufacturer of wind energy systems with a focus on turbines in the multi-megawatt class
- Production sites in Germany (Rostock – blades and nacelles)
- Headquartered in Germany (Hamburg), subsidiaries in more than 20 other countries
- Listed company on the German TecDax
- ~3,300 employees
- Track record: >6,000 turbines and >10,700 MW in 40 countries worldwide
- Acquired the Spanish manufacturer Acciona recently and is in a merging process.
- Installed basis in Turkey ~ 1000 MW

Geographic split of installed base

- Germany: 24%
- Rest of world: 49%
- Asia: 10%
- Turkey: 8%
- Americas: 8%
Yearly installed volume is still too low to make the market a high volume market.

A volume of approx 1500-2000 MW/Year should be targeted for the Turkish market.

Development in the industry could be faster, if the volume could be increased.

Regulation for development of Wind Farms should be revised.
MORE LOCAL CONTENT AND SOURCING

Towers
- Towers are being produced in Turkey

Anchor cages
- Anchor cages are being sourced in Turkey since 2012

Blades
- Blades are being produced in Turkey and also being exported to outside Turkey.

More local content/production and sourcing is needed to develop the industry further

Design and development of products for the wind industry should take start.
### Consultant services
- Development of more consultant services are needed.
- In the areas of HSE, Project Execution, and EPC Contracts

### Erection, logistic, cranes, maintenance
- More erection and crane companies are needed.
- Qualified personnel for erection and maintenance are needed.

### Specialized areas of services - partnerships
- Specialized areas of services needed.
- Partnership with know-how companies can be the way forward.

### Training Academies
- More training centers/academies needed in the market.
- Training of personnel in every level is urgently needed.
Today several possibilities for local as international financing is possible.
As the share of local content is increasing, financing internationally is getting less possible, where local fund are demanded.
New concepts should be developed through leasing, project financing and new sources.
.....Thank you

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