

DEWI International – New Offices and Co-operation in 2008

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In line with the general requirements of the wind energy market, DEWI GmbH has further expanded its international activities. In addition to the subsidiary DEWI North America Inc. in Toronto/Canada (see DEWI Magazin No. 33) other DEWI offices were opened in China and Italy and an exclusive co-operation was established for the Turkish market. DEWI GmbH now is optimally positioned in order to cater to customer needs individually in these fast-growing markets.

DEWI in China

The wind market in China has experienced a dramatic increase since a few years, like in many other fields, it becomes a factor more and more important forming the global wind industry. Firstly it is noticeable that already in 2008, two years earlier than the original plan for 2010, a capacity of 12,1750 MW of wind energy has been connected to the grid, ranking China the 4th biggest wind power producer in the world. Secondly, China has become a new center of the wind turbine production. In 2008, wind turbines with a total installed capacity of 6,300 MW were produced, another big increase. As a result of the current situation and expected trend, many are convinced that China will be the biggest wind turbine supplier and market ahead of USA and Germany before the year of 2020.

Seeing this, DEWI is determined to dedicate its services to this emerging market and the quickly growing demands from customers in China, just like DEWI has been doing since decades in other markets. Since June 2008, the Representative office of DEWI is opened in the capital city of China, Beijing. Yan Kuang is the first Chief Representative at Beijing Office, for several years he has been engaged in the wind sector with a manufacturer and is well aware of the requirements and demands that the customers would have. Even long before DEWI became represented with an office in China, DEWI had already participated in several projects, like performing the measurement for new wind turbines, consulting for the high level government, providing trainings for newcomers or hosting seminars for advanced interests. As a result, DEWI had witnessed many exciting moments in the early days when the dramatic development in China started.

DEWI sees the biggest potential in the manufacturers who are interested in having their wind turbine prototype tested and measured, so the serial production can start as soon as possible. DEWI is currently operating several testing campaigns with several well known manufacturers for their latest wind turbine designs.

Another important target group are investors; despite the recent financial turbulence, they are still confident in financing more wind farms and consequently will involve neutral

World map with DEWI offices incl. Egeres

- 1 DEWI in Germany
- 2 DEWI in Spain
- 3 DEWI in France
- 4 DEWI in Italy
- 5 DEWI in Canada
- 6 DEWI in Brazil
- 7 DEWI in China
- 8 DEWI Partner Egeres, Turkey

Countries with DEWI clients have a blue colour

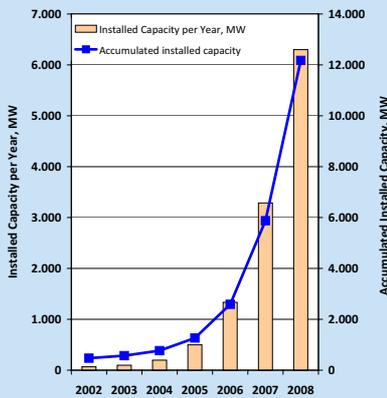
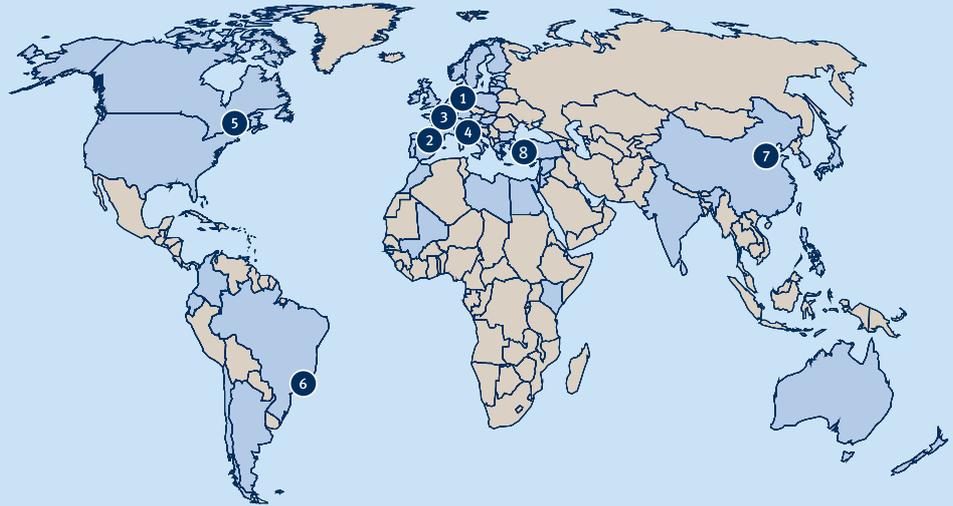


Fig. 2: Development of the yearly and accumulated installed power in China

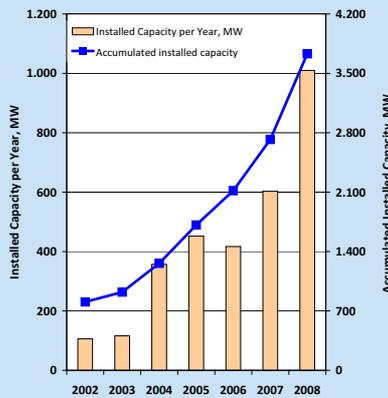


Fig. 3: Development of the yearly and accumulated installed power in Italy

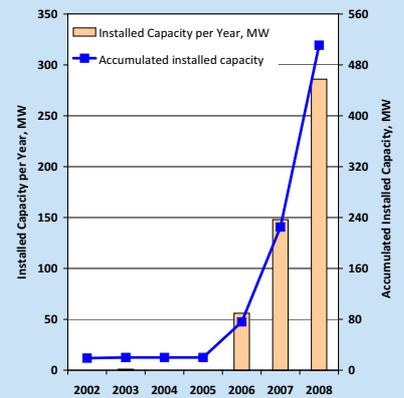


Fig. 4: Development of the yearly and accumulated installed power in Turkey



Fig. 5: Y. Kuang, DEWI China



Fig. 6: F. Durante, DEWI Italy



Fig. 7: G. Kurtaran, Egeres, Turkey

institutes in the project evaluating, wind measuring, due diligence and so on.

China's government is determined to be more active in environment protection and energy saving and consequently pursues a new policy. Here DEWI is perfectly positioned to provide assistance as DEWI is a government founded institute. In addition, the latest investment package from China's govern-

ment suggests that infrastructure construction is one emphasis to improve the economic environment as well as to stimulate the economics.

DEWI in Italy

DEWI has been supporting the growth of wind energy in Italy for almost ten years. During these years the company has closely followed the development of the industry in this country and promptly answered every time when the need for expertise and consultancy presented itself. In the last two years the wind energy has become a stable and promising reality in Italy and the demand for support and know-how grew together with the number of installed megawatts. In early 2008 DEWI decided to enforce this support by establishing a branch in the country. The office was established in northern-west Italy in Genoa, town historically bound to the Italian energy sector. The branch is directed by Francesco Durante who has been working at DEWI since almost six years in the research and micro-siting fields. The support provided by DEWI in Italy is basically addressed to developers, investors and banks for whom DEWI offers consultancy and due diligence services. Whereas in the early years DEWI mainly concentrated on the execution and monitoring of high quality wind measurement campaigns, in the last years the activities are more and more connected to the provision of independent opinions regarding the aspects of the projects related to wind resource and wind technology. As a result DEWI today is involved in a large number of energy yield assessments for investors, developers and banks, site classification studies according to IEC standards and wind-related due diligence tasks. DEWI has become in Italy a leading institution for site calibration services and power curve measurements according to international standards.

In the last years the Italian project developers and investors showed a strong interest for wind farm projects outside Italy, especially in Eastern and South East Europe. For these "green fields-projects" DEWI already offers wind resource mapping tools and wind measurement campaigns which are useful to evaluate the real potential of the project already at an early stage.

With the Italian branch DEWI aims to improve even more the quality and the services provided in this country. This intent will be achieved by offering a closer communication with the customer and a better management of the project schedule. The Italian branch will also participate in the development of the tools and the procedures used by DEWI by tuning them to the reality of the Italian projects.

DEWI-EGERES Co-Operation & Wind Energy in Turkey

Investors' attention on the wind energy sector in Turkey has begun to rise towards the end of 2007. Licence applications to EMRA amounting to more than 78,000 MW in November 2007 show the great interest of Turkish and international investors. Main reason for this rising interest is obviously the huge wind potential of Turkey, especially in the western, north-western and southern parts of Turkey. The purchase guarantee of 0,05€ per kWh given by the law in April 2007 to electricity from renewable energy sources is enough to encourage the investors and is at least a good start.

Egeres Ltd. has been established to give consultancy services to wind energy projects in the beginning of 2008. In June 2008, DEWI and Egeres have signed a partnership agreement for combining their respective capabilities to develop business in Turkey in the wind energy sector. For this purpose, DEWI has given the exclusive right to EGERES to be the point of contact for DEWI services in Turkey wind energy projects. In August 2008, Egeres has started to produce tubular wind measurement towers of 60 m height in its manufacturing facility in Izmir. For measuring at and close to hub height, 85 m Egeres lattice towers will be in the market in 2009.

The services of this partnership starts with the measurements; Egeres is producing and installing the towers, DEWI is monitoring and reporting the measurements. At least one year measurement is needed for a reliable energy yield assessment. An accredited report is what the investors need to get credit on the projects. Today, the partnership is giving consultancy to more than 25 wind energy projects which covers around 1.500 MW theoretical capacity. Based on the recent success of their cooperation and the growing demand for consultancy services, both companies intend to consolidate their structure in Turkey.

Despite the global economical crisis, the investments didn't stop but only slowed down in Turkey. There are some expectations in the market like the regulations of licence applications to come to a point this year. Main work in this regard is on TEIAS (Turkish Electricity Transmission Company). Since there is a huge demand on Wind Farm licences, TEIAS duty on determination of connections and transmissions to national grid is not easy. So it will take much more time, indeed the investors are obligated to complete their documentation for evaluation. Definitely, the projects where wind measurements were carried out will be one step ahead of the others in obtaining the licence.

Today, worldwide energy companies are involved in a serious number of wind energy projects in Turkey. In the following 5 years, a continuous sharp increase will arise in wind energy capacity. A motivating scenario is that Turkey will reach 7,000 MW of wind energy capacity installed in 2013.