

Opportunities in the wind energy sector

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Wind power across EU

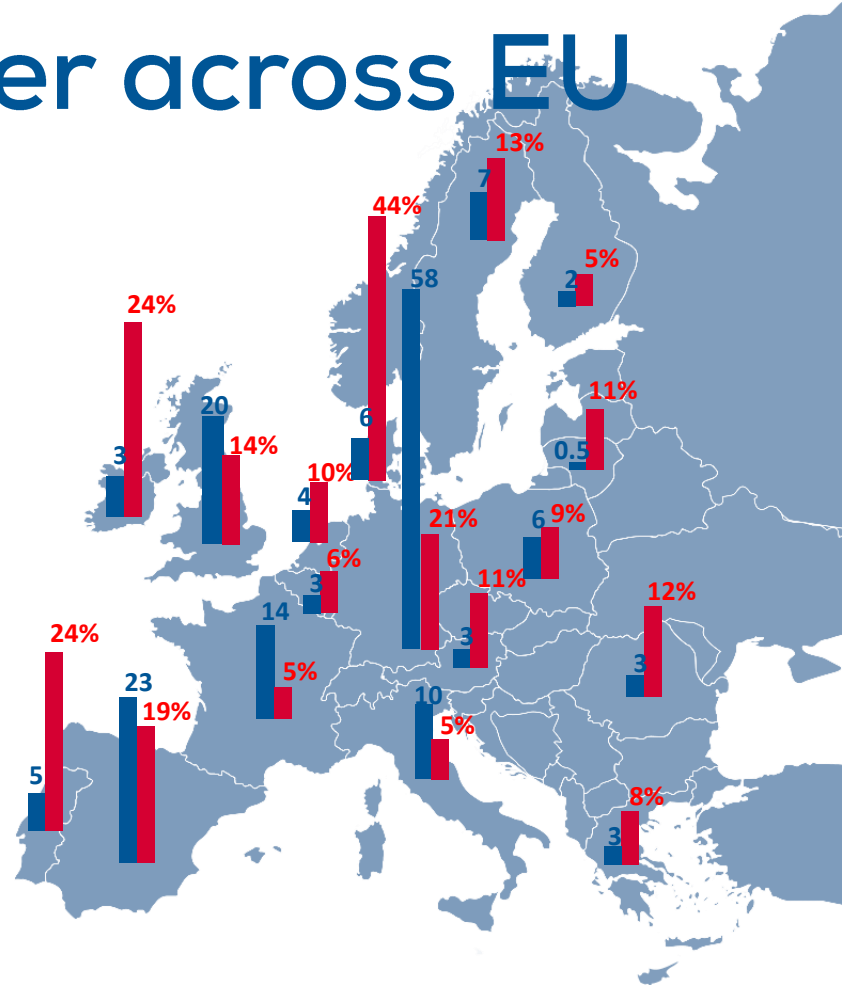
173 GW

By 30 June 2018

12%

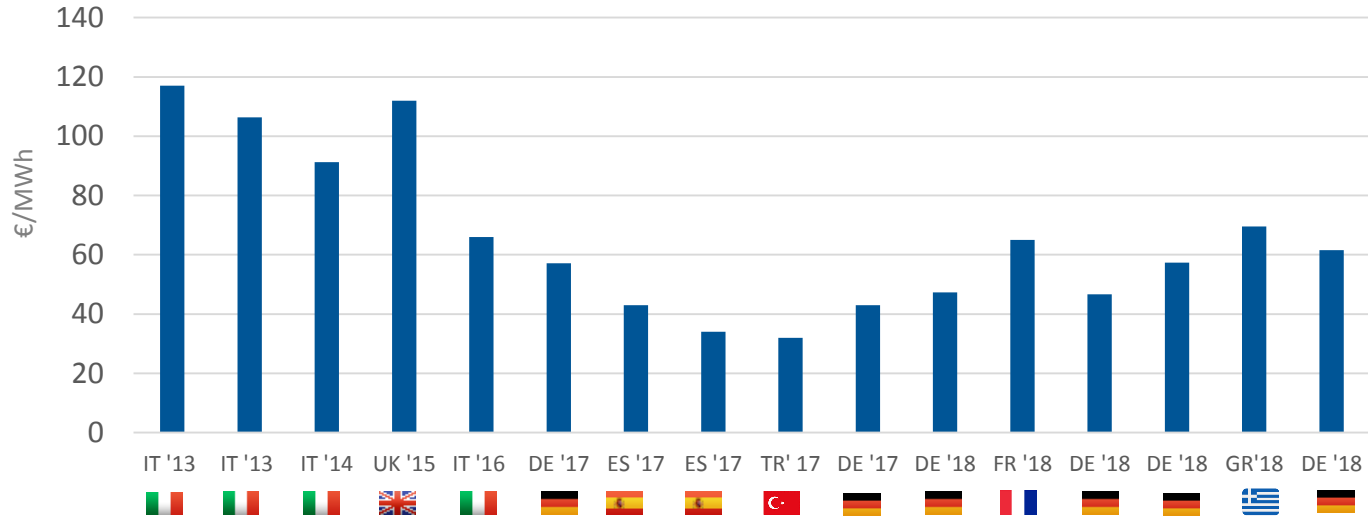
of 2017 EU power demand

○ GW installed
● Penetration

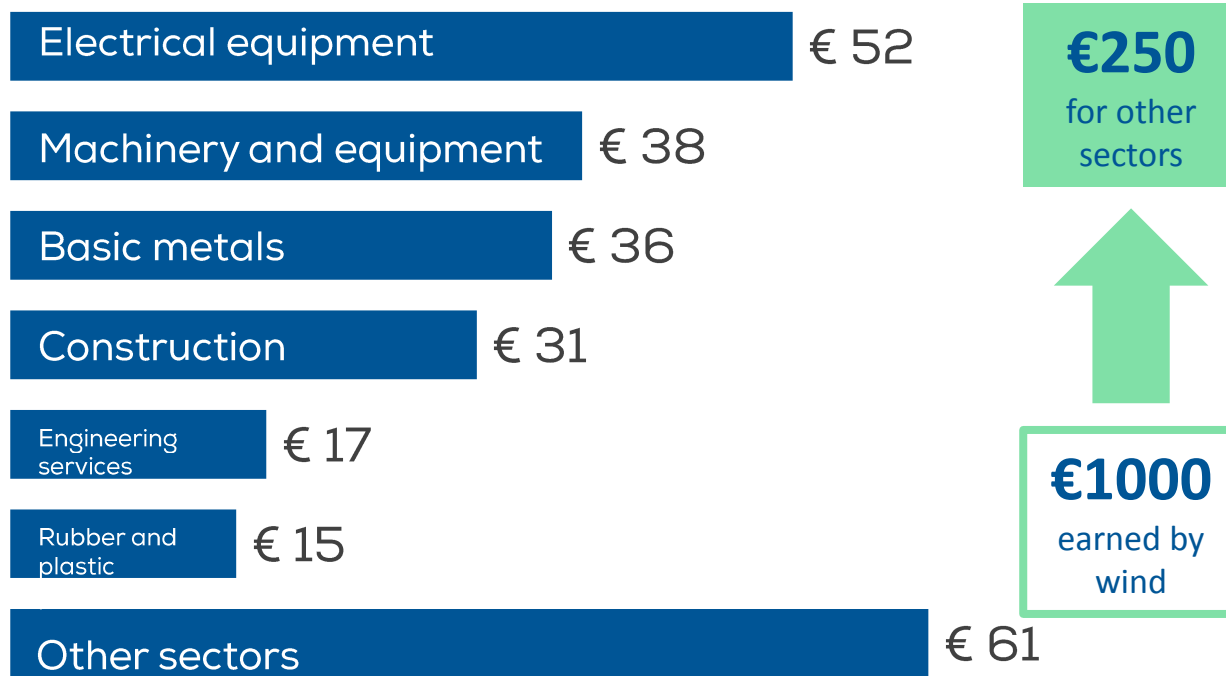


Cost reduction: Onshore wind

Strike prices in auctions

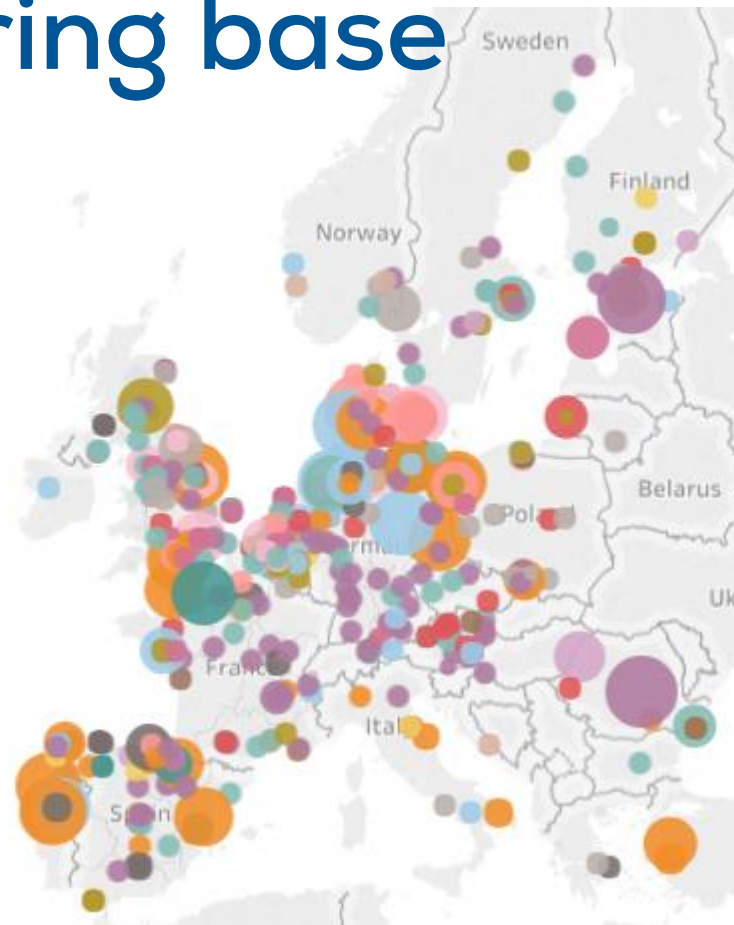


Contribution to other sectors



Diverse manufacturing base

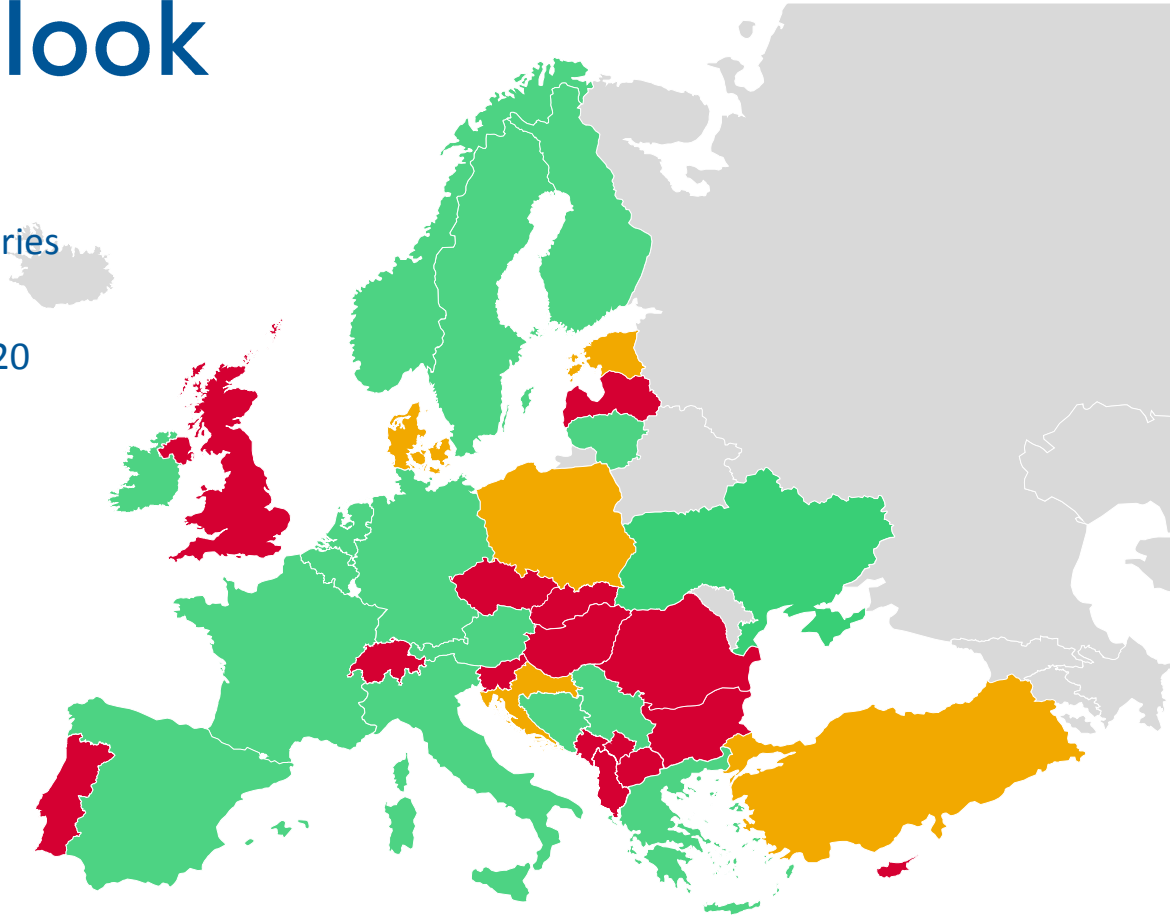
- Components
- Assembly
- Blades
- Foundations
- Gearboxes
- Nacelles
- O&M
- Other
- R&D
- Towers
- Cables
- Generators
- Logistics
- Port



Onshore outlook

- Strong installation activity in large countries
- Uncertainty after 2020 still remains
- Many countries have stalled completely (mostly CEE)

- Positive Outlook
- Uncertain Outlook
- Poor Outlook



Wind jobs in Coal Countries

Poland



6 GW

ENOUGH TO POWER
3.5M HOUSEHOLDS



7%

OF POWER DEMAND



8,000

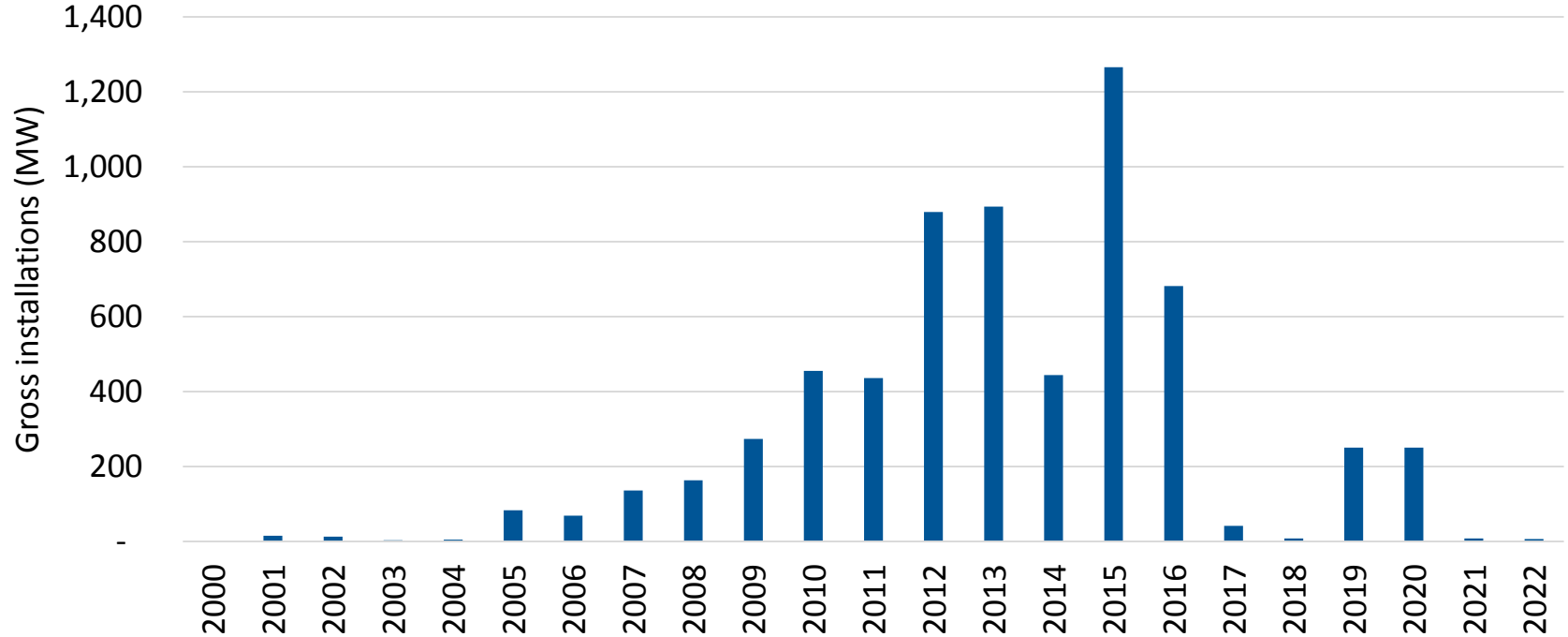
JOBS



€3.7bn

INVESTMENTS
SINCE 2010

Poland



Spain



23 GW

ENOUGH TO POWER
12.5M HOUSEHOLDS



18 %

OF POWER DEMAND



22,500

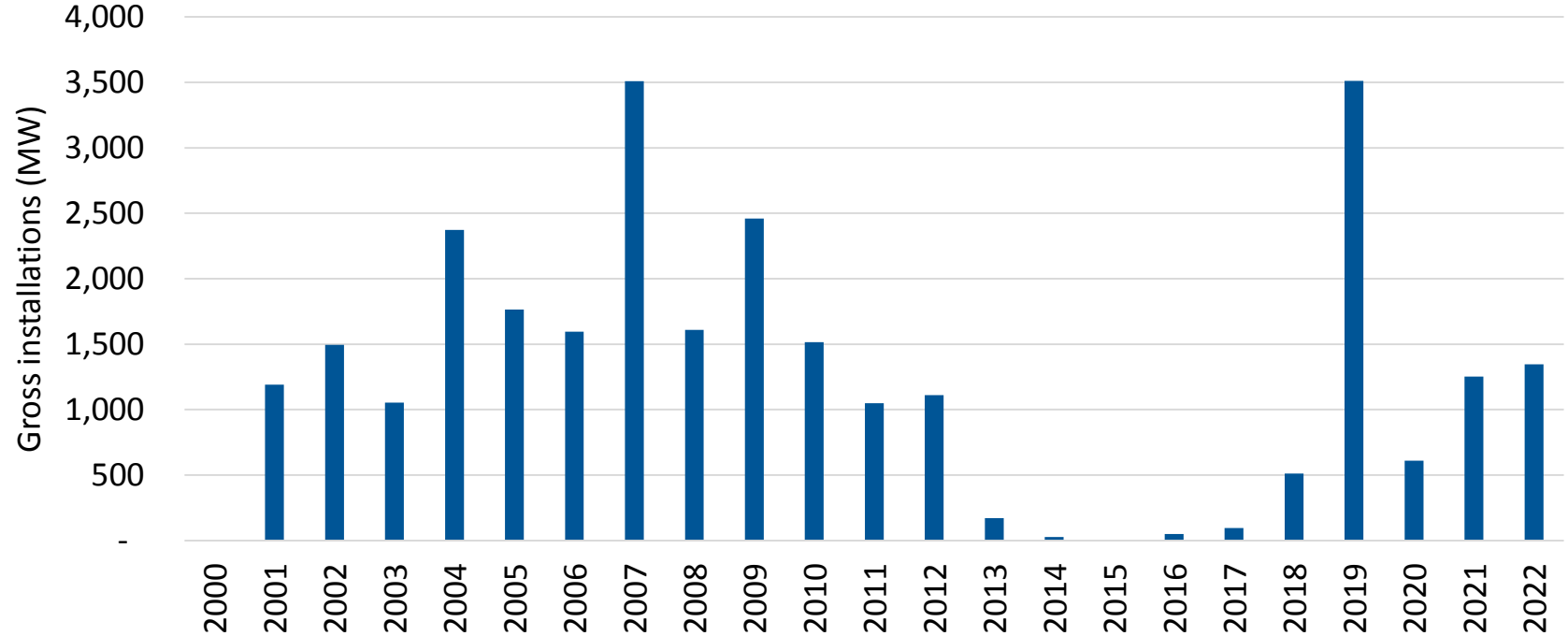
JOBS



€2.9bn

INVESTMENTS
SINCE 2010

Spain



Germany



56 GW

ENOUGH TO POWER
34M HOUSEHOLDS



21 %

OF POWER DEMAND



160,200

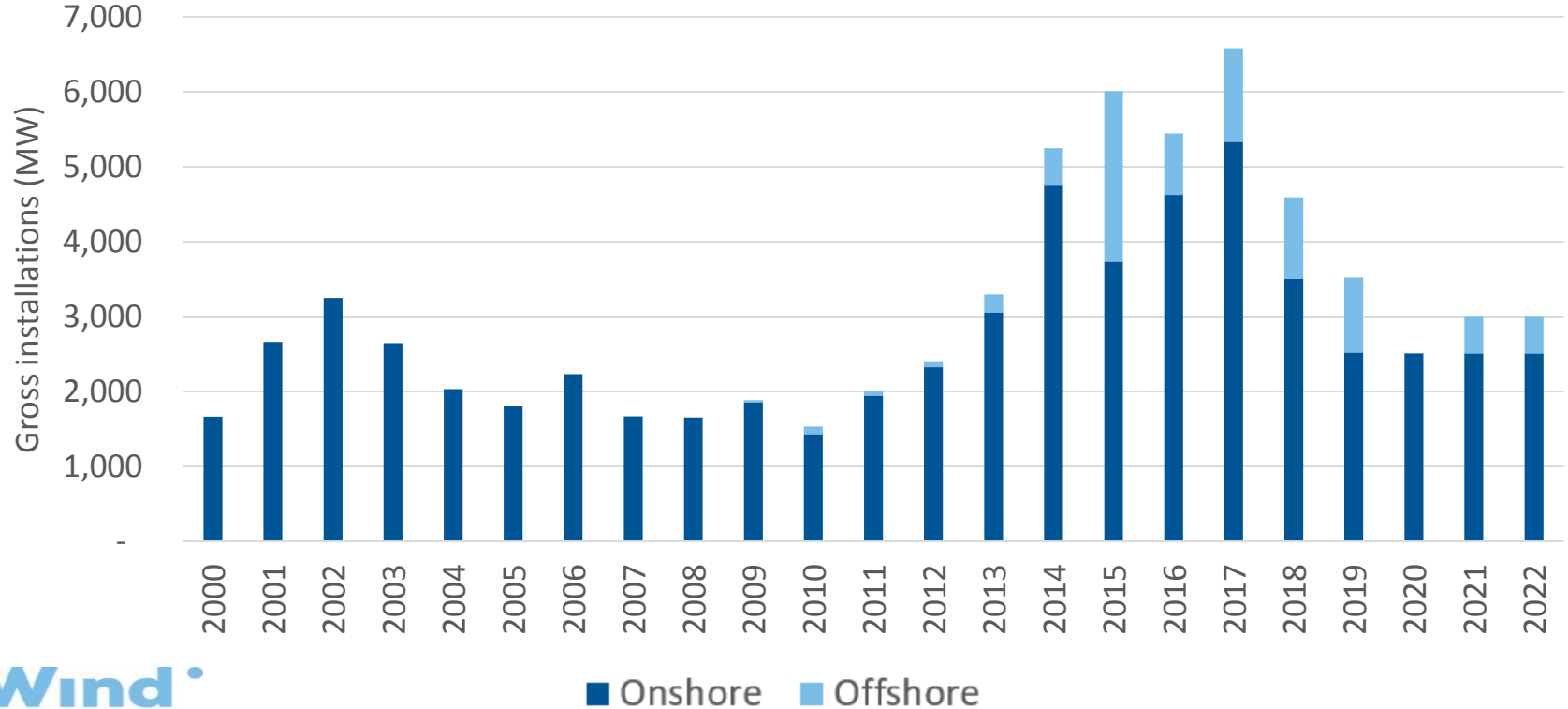
JOBS



€37bn

INVESTMENTS
SINCE 2010

Germany

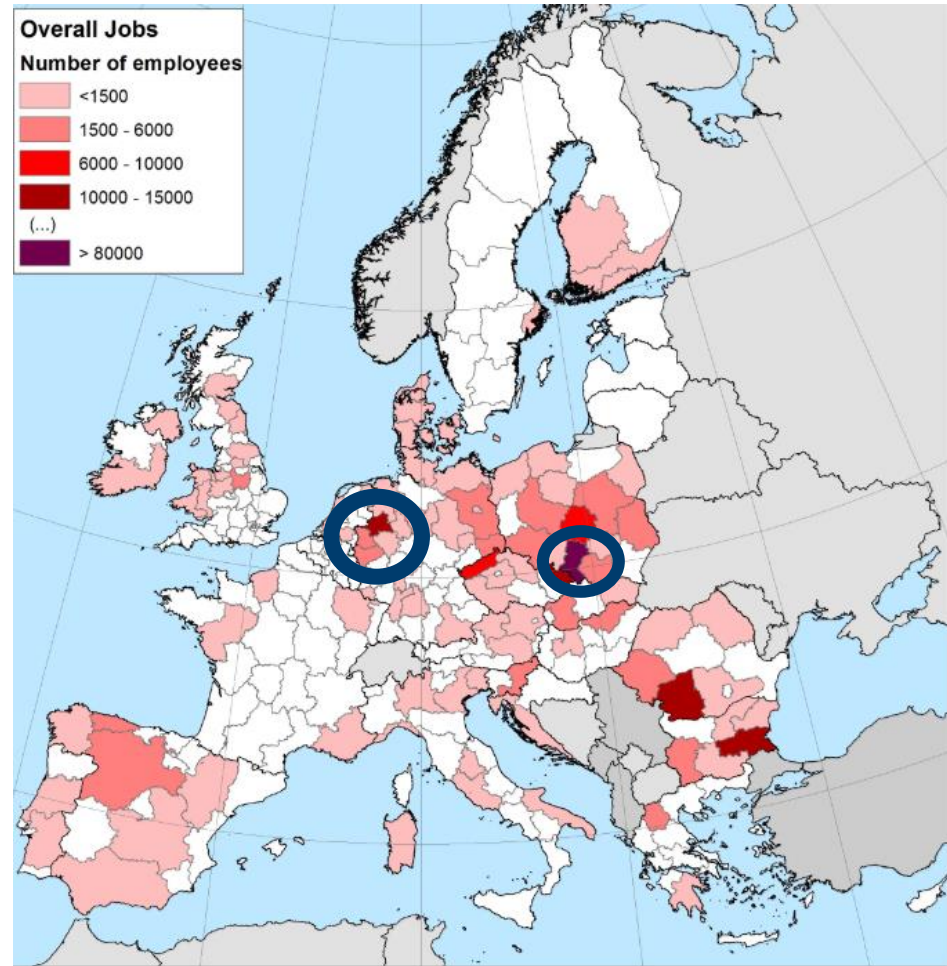


Wind jobs in Coal Regions

The image features a blue-tinted landscape. In the foreground, a curved, metallic structure, possibly a wind turbine nacelle or a roof, is visible. The middle ground shows a flat, open landscape with several wind turbines scattered across it. The background consists of rolling hills under a sky with light, wispy clouds. The overall scene is presented in a monochromatic blue color scheme.

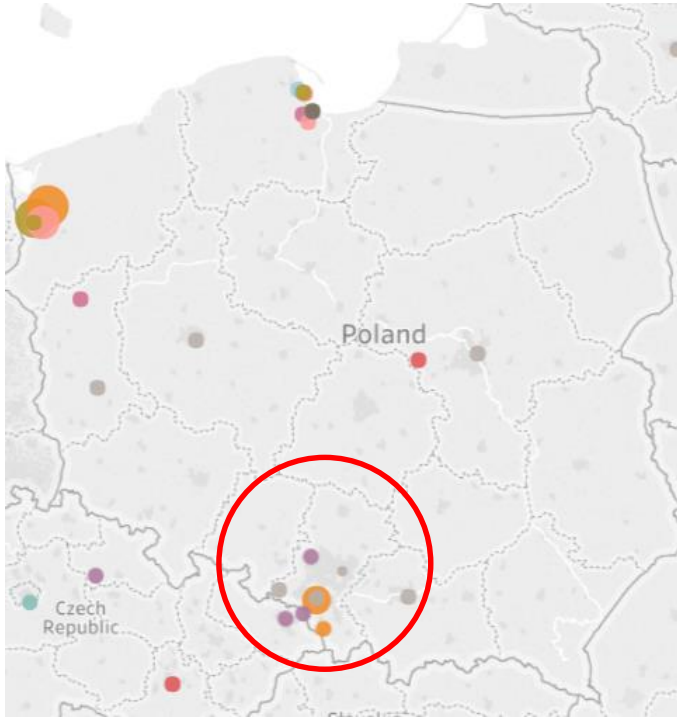
Coal regions

- Silesian Voivodeship, Poland
- North Rhine-Westphalia, Germany



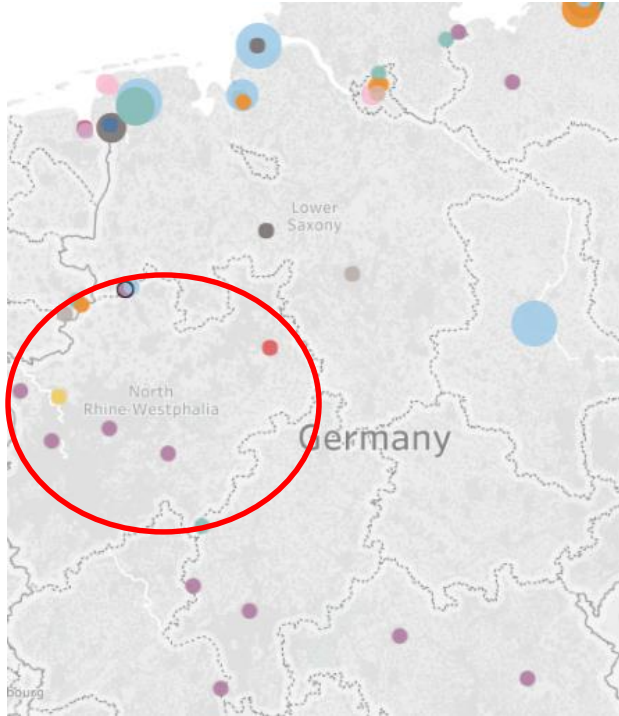
Source: European Commission 2017

Silesian Voivodeship, Poland



- Żory-Warszowice - Senvion's blade factory in 2008, enlarged in 2012 thanks to EU funding.
- Pyskowice – Ormazabal's factory for Transformer Substations.
- Ustroń – Senvion's manufacturing facilities acquired in 2016.

North Rhine-Westphalia, Germany



- Voerde – Winergy’s headquarters and manufacturing facilities since 2011.
- Detmold – Weidmüller headquarters. Power and data solutions.
- Krefeld – Ormazabal’s manufacturing site of switchgears.



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at EU and national level



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THANK YOU

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