

WINDERGY

# State of the art in O&M commercial models by OEM and in-house capabilities of developers globally. Opportunities for Indian players

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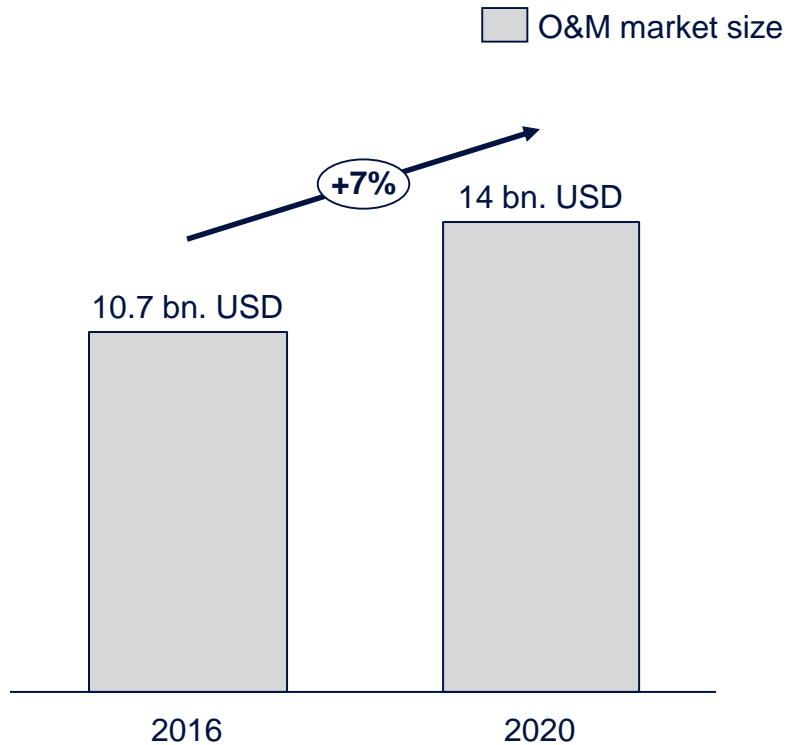
mec+

Global wind turbine O&M is expected grow at 7% to reach a USD 14 bn. market by 2020, out of which India is expected to be USD 1 bn.



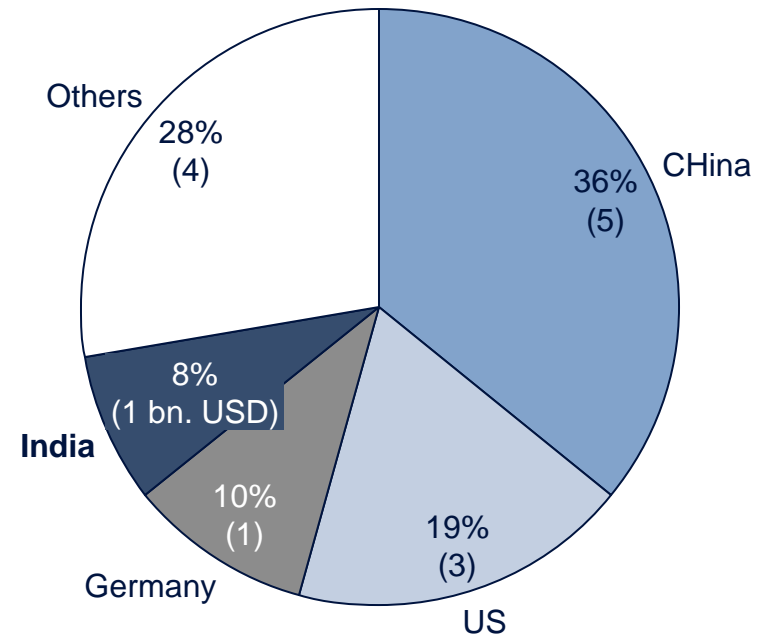
### Global O&M market size

USD bn.



### Spilt of 2020 O&M market by country

%, USD bn.



Note:  
2 | Source: GWEC; MEC+ analysis

# Wind turbine O&M value chain has five value segments, each covering variety of services

 Share in O&M market size  
 \$ Margin (~10%)



Note:  
 3 | Source: MEC+ analysis

Various type of players are active in the O&M services market, presence of each type depends on regional dynamics

