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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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.

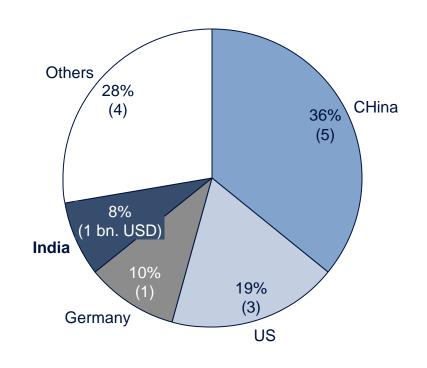
Global O&M market size

USD bn.



Spilt of 2020 O&M market by country

%, USD bn.



WInd turbine O&M vale chain has five value segments, each covering variety of services



Share in O&M market size

\$

Margin (~10%)

Basic maintenance



\$

- Scheduled maintenance of components
- Unscheduled maintenance of minor components
- Remote monitoring and diagnostics

Advanced maintenance



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 Unscheduled maintenance of major components like gearbox, generator, etc. **Spares**



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- New spare part supply
- Part repair engineering and workshop execution
- Repaired part supply

Upgrades



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- Output improvement upgrades
- Reliability improvement upgrades
- Lifetime extension upgrades

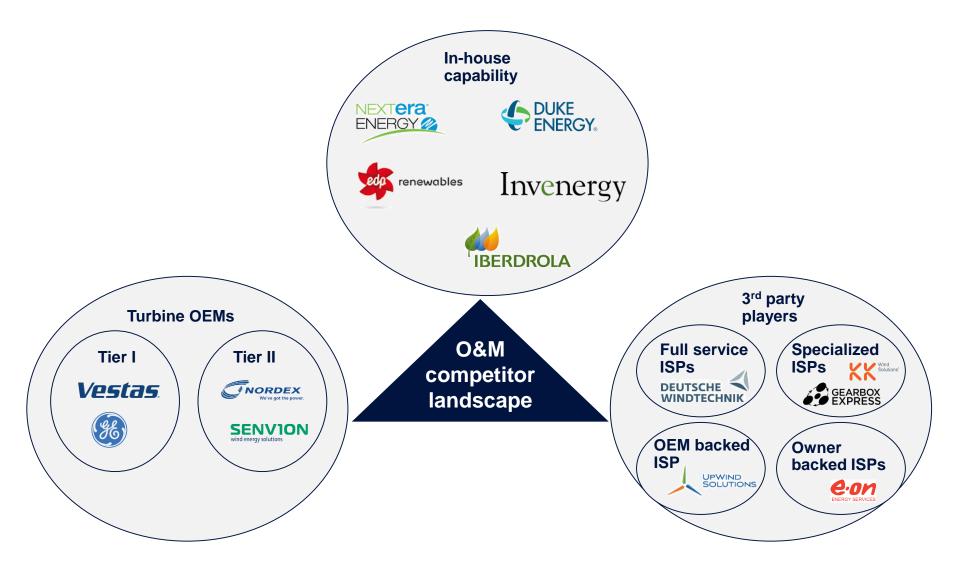
Asset management



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- Park management and technical support
- Power forecasting, outage planning and life estimation
- Power trading and sales
- Power price forecasting
- Administrative services

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



Note:*

4 Source: MEC+ analysis