



# WINDPOWERUPDATE



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Nordex extending production facilities

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## SERVICE

New organisation: Decentralised and close to customers

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## SWEDEN

Successful re-entry into the Swedish market

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approx. 100-metre rotor diameter

## N100

THE HIGH-YIELD  
2.5 MW TURBINE  
FOR INLAND SITES





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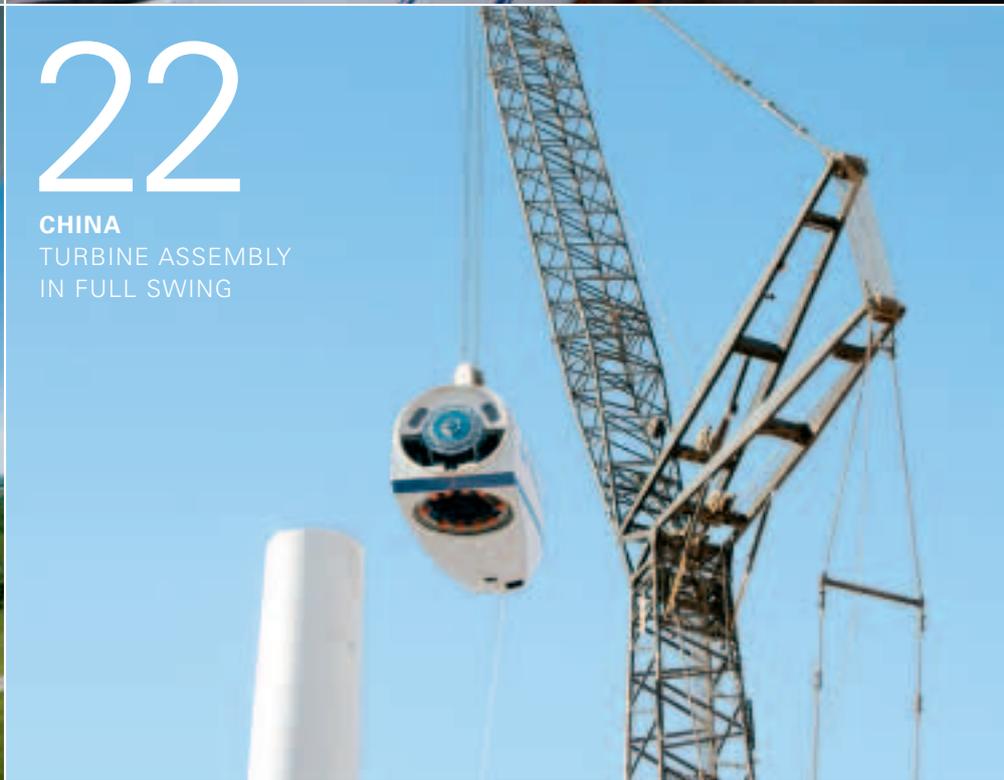


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**NORDEX EXTENDING PRODUCTION FACILITIES** CAPACITY OF 2,500 MW PLANNED IN ROSTOCK



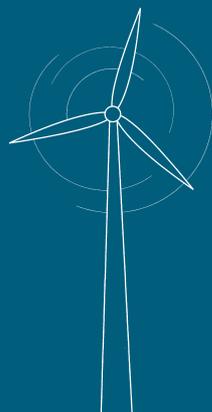
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Phone: +49 40 50098 -100, Fax: +49 40 50098 -101

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# NORDEX PRODUCT PROGRAMME

TYPE	CAPACITY	REGULATION	MARKETS
<b>Nordex N60</b>	1,300 kW	Stall	Europe, Asia, Latin America
<b>Nordex S70, S77</b>	1,500 kW	Pitch	Europe, China
<b>Nordex N80</b>	2,500 kW	Pitch	Europe, Asia, Latin America
<b>Nordex N90</b>	2,300 kW	Pitch	Europe
<b>Nordex N90</b>	2,500 kW	Pitch	Europe, Asia, America
<b>Nordex N100</b>	2,500 kW	Pitch	Europe, America



## EDITORIAL



Dear reader,

A rotor diameter of almost 100 metres and a roughly 23% increase in rotor sweep compared with the proven N90/2500 turbine to 7,823 square metres are just some of the prominent characteristics of our latest multi-megawatt turbine, the N100/2500. With this sweep and an installed output of 2,500 kW, the turbine will generate maximum electricity yields in inland regions in particular, measured in terms of specific space requirements. Backed by roughly seven years of experience in developing 2.5 MW turbines and over 700 N80/N90 turbines either already installed or currently being assembled, we will be offering you a highly efficient wind turbine ideally suited for moderate wind sites in particular.

A glance at our order books reveals that our customers have found in us the right partner. Thus, we recently signed our largest contract to date with Babcock & Brown for the capacity of up to 640 MW—primarily in Portugal and France. We have now successfully entered the Swedish market. As well as this, we have laid the foundations for a return to the US market by successfully taking part in Windpower 2007 and erecting our first N90/2500 turbine in Minnesota on schedule. As well as this, we have applied for international patents for our “Nordex AP” control system.

Demand for multi-megawatt wind power systems is rising all around the world. For this reason, we will be enlarging the annual capacity of our turbine assembly facilities in Rostock from 800 MW to 2,500 MW by the end of 2011, accompanied by an increase in rotor blade production output from 300 MW to 1,300 MW. We also want to join the top league with our service offerings. With this in mind, we are restructuring our previous service activities in the interests of achieving greater customer proximity and improved system output. These are just some of the subjects about which you can find out more in this issue of Windpower-Update.

I wish you pleasant reading.

A handwritten signature in blue ink, appearing to read 'Carsten Pedersen'. The signature is fluid and cursive, with a large initial 'C'.

Carsten Pedersen



Thomas Richterich, CEO of Nordex AG

## INTERVIEW WITH THOMAS RICHTERICH “WE WANT TO FOCUS ON REGIONS IN WHICH WE CAN ACHIEVE A DOUBLE-DIGIT MARKET SHARE”

**The market for wind turbines is continuing to grow sharply all around the world. In fact, all market analyses indicate that the wind power sector will grow by 15–20% over the next few years. Where is Nordex setting its priorities to ensure that it continues to grow more quickly than the market as a whole?**

According to BTM, the wind power industry can expect average annual growth of 17% in new installations over the next five years. Around 46% of this demand will come from Europe and 26% each from Asia/Pacific and America. BTM assumes that, while Europe will remain the largest market, annual growth rates will be greater in Asia and America.

**Does this mean that Nordex will be increasingly targeting its sales efforts at non-European regions?**

Our expansion strategy entails several different aspects. We have always focused on Europe, and will continue to do so in the future. In this respect, we will be primarily concentrating on regions in which we can achieve a double-digit share of the market in the short term. As we see it, there is little to be gained from being present everywhere, as this ultimately means that we will end up with numerous individual projects spread all around the world. Instead, we can establish local project management and service structures in the individual countries to achieve greater customer proximity in these markets and react more quickly to new requirements.

**In which European markets has this approach paid off for Nordex so far?**

In France, Nordex was number one in 2006 with 33% of the market. With almost 100 employees, we have built up solid structures in that country. The UK is well on the way to following this example. With all the new business we have gained, we are one of the market leaders in the British Isles again. Then comes Italy followed by new markets in Eastern Europe and Scandinavia.

**What about the other regions? What strategy are you pursuing there?**

We have been very active in China since around 2005 to build up a new position in this market, which exhibits the greatest long-term growth potential. Back in 1998, Nordex was the first turbine producer to set up its own production facilities in China. Using this experience as a basis, we launched new activities in that country in 2005, with our turbine assembly facility in Yinchuan going into operation at the end of 2006 and our rotor blade factory in Dongying at the beginning of 2007. It will take a few more months for us to reach full capacity utilisation. We will then be supplying other markets in the Far East from China. India, the second main market in Asia, obeys different rules, however. Here, we are looking for a partnership, which will also include project development activities. This is the only way of building up profitable business in that country.

## DID YOU KNOW ...

... that with expansion rates of up to 92%, Italy, the United Kingdom and France are the swiftest growing markets in Europe?

... that Nordex employed a total of 1,121 people all around the world as of March 31, 2007?

... that according to the 2007 BTM study the United States will remain the largest single market with new installations of 3,400 MW?

... that the trend towards multi-megawatt systems is continuing in Nordex's new business broken down by turbine type, and that roughly 86% of new orders are for the N80/90?

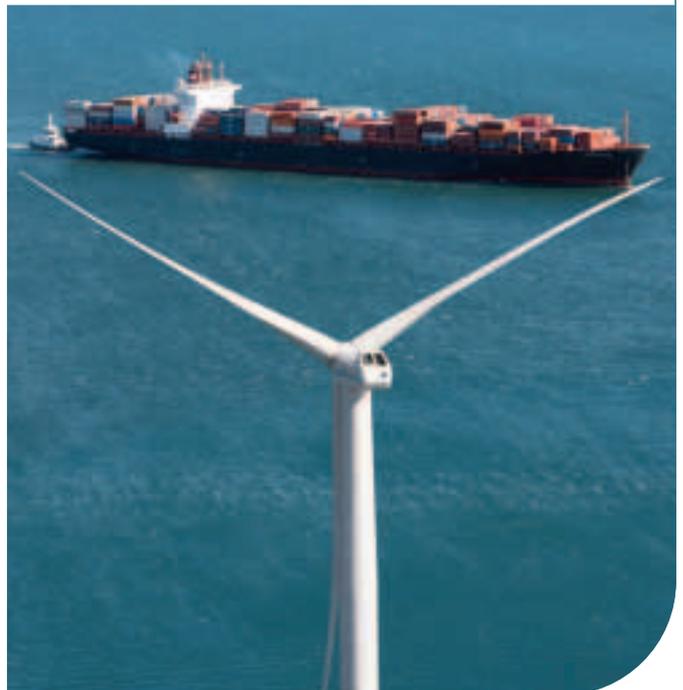
... that new capacity of only 200 MW is expected for the offshore wind power segment in 2007, equivalent to only 1% of total new installations, which is why Nordex is continuing to primarily focus on the onshore market?

### **In June, you attended Windpower 2007 in Los Angeles. Did this mark the commencement of efforts to return to the US market?**

We are now tackling our return to America, or, more specifically, the United States. At the same time as Windpower, we assembled our first US version of the 2.5 MW turbine in Minnesota. We are confident of strong sales potential in the future for this turbine in the United States, as the average capacity per turbine in the local market is still under 1.7 MW. There are major differences between the United States and Europe in the electricity grid and the wind band, i.e. the distribution of wind speeds over time. For this reason, we are taking our time and testing the system intensively under local conditions. Then, starting in 2008, we will execute a preliminary contract with 10 to 20 turbines. At the same time, we will start building up local structures in the United States. We expect to achieve significant deliveries in 2009 and 2010, which will then be sourced using local structures. In other words, we want to produce in the United States as well in the medium term. Our goal is thus to build up central production facilities in each of the main regions of Europe, Asia and America.

### **What about product development?**

Up until 2011, we will be concentrating on the volume onshore market. Accordingly, the next step in product development activities entails an extension to the K08 platform with an output of 2.5 MW. This is a turbine with a rotor diameter of 100 metres for weaker wind locations, and is a good fit for our range in Germany, France, Italy and Poland at the moment and definitely also for the United States. We will be unveiling this turbine at Husumwind 2007.



## NORDEX EXTENDING PRODUCTION FACILITIES CAPACITY OF 2,500 MW PLANNED IN ROSTOCK

Thanks to a more reliable basis for planning, we have fine-tuned our medium-term forecast and now expect to generate sales of between EUR 2.5 and 4 billion in 2011. At EUR 2.1 billion at the end of April, our order backlog (including contingent orders) reached a new record, sufficient to ensure the previously forecast top line growth of an annual 50% beyond 2008. At the same time, we want to invest a sum of around EUR 280 million in building new production facilities and extending existing ones between 2007 and 2011.

With the European market in particular in mind, we will be launching a capital spending programme worth a total of some EUR 85 million targeted at our Rostock facility this year. The aim is to increase turbine assembly capacity from a current 800 MW to 2,500 MW by 2011, accompanied by an increase in rotor production from 300 MW to 1,300 MW.

The site for this will be the rotor production facility in the cargo transport centre close to the port of Rostock. In a preliminary step, Nordex will be enlarging the rotor blade production hall by a good 100% or 14,000 square metres, gutting the grinding and painting cabins and placing these activities in a separate building with a floor area of 9,000 square metres. In this way, it will be possible to produce rotor blades with a length of over 50 metres in the future. The second step will entail the turbine and switch box assembly activities with a floor area of 37,000 square metres.

Nordex is also extending its activities in China, where we currently have annual turbine assembly and rotor blade production capacity of around 200 MW. This figure is to be increased to around 600 MW each by 2011. We are also planning to establish local structures in the United States as of 2009.



1 **Nordex will increase turbine assembly**  
capacity in Rostock to 2,500 MW by 2011.

## DECENTRALISED AND CLOSE TO CUSTOMERS NORDEX SERVICE WITH A NEW ORGANISATION IN 2007

In the medium term Nordex plans to become one of the top favourites among service providers in the wind sector. This is why we are revamping the previous structure of the Service department in the course of this year. Greater proximity to customers and improved turbine output are right at the top of the agenda for 2007.

In the first step we will be reorganising the Service structure in Germany and then implementing these changes in the core European markets and China this year as well. The starting point is the establishment of a Service division in each country. This standardises all Service processes under a central management. For instance, the work of the previous regional centres in Germany – like Bitburg and Rostock – will be bundled in Paderborn. In the core foreign markets of France, the UK and China, Nordex will be setting up these divisions in Paris, Edinburgh and Peking. The central office in Norderstedt will continue to be responsible for all other locations. These divisions will then be in charge of Service activities in the regions of the country. In Germany for instance, the Service map is divided into the regions of Paderborn, Bitburg, Rostock, Wremen and Kemberg/Ihlewitz. In each of the regions the Service Manager is the contact person for the Service team, comprising between 14 and 16 staff. The Service Manager will be your personal point of contact in your region and will, of course, be in direct contact with our Service engineers. The benefit for the customer is that in future he will have a contact who is also physically close to his wind park.

And as if that were not enough, forward-looking intervention and reinforcement of the technical staff are intended to improve the performance of the machines at the same time. For this purpose, the Service engineers will in future be supported by an especially trained “trainer” in the region as their contact for technical questions and problems. In addition to this, “stand-by engineering teams”, flexibly used for maintenance and major repairs, will support the overall Service team.

Nordex is also reorganising its Service division when it comes to modernising and updating the turbines. Customer consultants based in the central divisions are your first contact point for questions relating to our wide range of services relating to upgrading your turbines to a state-of-the-art level. It goes without saying that our customer consultants are in close contact with the Service managers and Service engineers in the field in order to coordinate any repairs or maintenance required or to take advantage of modernisation opportunities. A range of training courses will prepare Nordex staff for their new tasks – so our customers always have an expert to contact for all their needs.

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**OUR SERVICE MANAGERS:**

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<b>Germany:</b>	Volker Bartolles	<a href="mailto:vbartolles@nordex-online.com">vbartolles@nordex-online.com</a>
<b>France:</b>	Björn Mumenthey	<a href="mailto:bmumenthey@nordex-online.com">bmumenthey@nordex-online.com</a>
<b>UK:</b>	Tom Robson	<a href="mailto:trobson@nordex-online.com">trobson@nordex-online.com</a>
<b>China:</b>	Maik Fabian	<a href="mailto:mfabian@nordex-online.com">mfabian@nordex-online.com</a>
<b>ROW:</b>	Ibrahim Oezarlan	<a href="mailto:ioezarlan@nordex-online.com">ioezarlan@nordex-online.com</a>

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Hendrik Potratz, head of Turbine Management

## INTERVIEW WITH HENDRIK POTRATZ “ENSURING THE GREATEST POSSIBLE ENERGY OUTPUT FROM WIND FARMS”

### **Mr. Potratz, why should customers entrust Nordex with the turbine management of their wind farm?**

We have been offering customers turbine management for wind farms for ten years now. In addition to turbine development, production and assembly, technical operations management forms a further mainstay of our competence. Backed by this expertise, and thanks to our full access to the operational data of the Nordex wind turbines, something which external operators do not have, we are able to offer our customers unique economic benefits. They benefit from the short information paths within Nordex as the manufacturer of their wind turbines on the one hand, and our ability to access all of the crucial databases held by Nordex on the other.

### **Other companies also offer turbine management. What things should customers watch out for here?**

Turbine management is frequently only seen as a cost element. Yet, high system availability as a result of reduced down times means greater profit, and long-term protection of the value of the turbine. In contrast to independent service providers, we offer end-to-end replacement parts delivery systems, professional error detection and well-trained service teams all under a single roof. Our colleagues at Nordex are fully aware of the complexity of the system, a fact which facilitates swift repairs.

### **What customers have opted for Nordex's turbine management services?**

Our customers include international utilities, funds and also operator companies. Via our extended and premium service packages or separate operations management contracts, they receive comprehensive support ensuring professional operations management. Today, we have over 300 turbines on our books all around the world, a number which is continuing to rise.

### **What can customers entrusting us with the operation of their wind farms expect from us?**

First and foremost, we are dedicated to ensuring the greatest possible energy yield from the wind farm. This includes minimising or even completely avoiding unscheduled down times. In addition, we operate the wind farm in accordance with all administrative and legal requirements and also represent our customers' interests in dealings with the land owners, suppliers, utilities and Nordex Service.

### **Could you be a little more precise?**

In principle, our activities concentrate on monitoring, supervising, implementing, documenting and analysing. This applies not only to the turbines themselves but also the entire wind farm infrastructure. We monitor the state of the turbines, the substation and the wind farm infrastructure. We analyse errors, evaluate operating data, oversee the performance of maintenance and repair work and check the plausibility of the service reports.

### **You check the maintenance work performed by Nordex Service?**

Yes, we check the work performed by our own service colleagues on behalf of our customers. The turbine management department is outside the internal corporate processes. In other words, we are not bound by any instructions and report directly to the Management Board. We are fully committed to our customers' interests – also within the Company. In addition to monitoring activities and calculating energy yield, we perform all the other work required to keep the infrastructure going, including maintenance and protective work on the turbines. As well as this, we are the central contract partners for third parties such as utilities. We ensure that electricity feed-ins conform to the contractual agreements, coordinate any grid outages and down times and oversee the operations and grid management of the existing transfer stations. We contact the land owners to determine lease payments, or to determine if any changes are required to the applicable contracts. We also represent our customers' interests in dealings with government authorities, insurance companies and local governments.

### **What criteria are used to calculate the costs of turbine management?**

Our extended and premium service packages include a defined availability guarantee. For this reason, it is in the interests of our customers and also in our own interests to achieve the greatest possible annual yield. Secure yields, in turn, call for high system availability and thus outstanding service quality. For this reason, the fees for technical operations management are based on yield. Ultimately, what we have is a classic win-win situation for both sides.

### **You said before that the ability to directly access key databases at Nordex offers a particular advantage in Nordex's turbine management. Why?**

As the operations manager, we use the Nordex database to document data and check its plausibility – after all, the yield calculations must be transparent, objective and correct. This applies, for example, to the monthly and annual yield statistics, the summaries of the operating periods, the comparisons of actual and target performance curves, disruption statistics and availability figures. We create life cycle files for each individual turbine and product group, comprising service activities, maintenance reports, down times, remedial times, disruptions, expert opinions as well as logs detailing new components. All data on any differences and yields are collated and forwarded to Nordex Engineering. In this way, they can help to improve the individual turbine families at Nordex. As a result, we are easily able to utilise potential for optimising the wind farms and thus achieve higher yields. Our goal is to provide our customers with the services guaranteed in the contracts and to implement improvements going beyond the agreed scope.

## N100

# THE HIGH-YIELD 2.5 MW TURBINE FOR INLAND SITES

Nordex is extending its range of multi-megawatt turbines with the introduction of the N100, a 2.5 MW wind power system specially configured for moderate wind conditions. The prominent feature of the N100 is its 49-metre-long rotor blades, resulting in a large rotor diameter of some 100 metres. At 7,823 square metres, this produces an increase of 23% in rotor sweep compared with the N90/2500 turbine, making the N100 particularly suitable for low wind conditions with average wind speeds of 6.5–7.5 m/s.

The N100 marks a further development of the N80/N90 family, of which Nordex has built over 400 turbines in international projects since 2000, with a further 370 currently being installed. All enhancements to the N80/N90 system developed over the past seven years have been incorporated in the turbine design. Numerous new detail solutions ensure heightened availability and greater yield in non-coastal locations in particular.

The performance curve and acoustic power level will be measured over the next few months. Grid compatibility is based on the proven engineering model used in the N90/2500. The turbine will be certified in accordance with DIBt2 and IEC 3a. It is supplied in a 50 Hz version, with a 60 Hz version also available for the US market. The turbine will initially be offered on 100-metre tubular steel towers. Pilot production is to commence in 2008, with serial production scheduled for 2009.



 **The N100:** The 2.5 MW turbine specially designed for moderate wind conditions.

## KYOTO PROTOCOL SOON TO CELEBRATE ITS TENTH ANNIVERSARY

### ARE GLOBAL CO<sub>2</sub> EMISSIONS DECLINING?

The Kyoto Protocol was signed almost ten years ago. Back in December 1997, the industrialised nations agreed to reduce their joint greenhouse gas emissions by at least 5% to 1990 levels between 2008 and 2012. This legally binding obligation marked a historical turnaround in the rise in emissions which had begun roughly 150 years earlier in these countries.

However, global CO<sub>2</sub> emissions have been rising at an ever-growing rate each year since 1997. In the last few years in particular, the rate of growth in emissions has been even higher than in earlier decades despite political commitment to solving the greenhouse problem in the past ten years. The reason for this rapid rise is the global increase in the use of coal as a source of energy. China, for example, is one of the four countries with the world's largest coal reserves, and in the wake of its economic growth has been using its domestic resources since 1980 to cover its energy requirements. Today, roughly 70% of China's electricity is produced using coal, with no end in sight. Thus, the country is planning to build further coal-fuelled power stations with a total capacity of 70,000 MW.

India, the country with the second largest coal reserves after the United States and also with a population in the billions, is likewise a sleeping giant when it comes to CO<sub>2</sub> emissions. If it follows in China's footsteps, any hopes of a global reduction in CO<sub>2</sub> emissions will be dashed for a long time to come.

On the other hand, global emissions of carbon dioxide have received an appreciable damper from increased use of renewable energies to produce electricity—foremost amongst them wind power as the most economically efficient alternative, thanks to engineering optimisation and heightened reliability in the past decade. At 0.8%, wind power contributes only a negligible volume of global electricity despite its enormous potential and the fact that individual regions are already covering 20% of their requirements from wind power.



 Global CO<sub>2</sub> emission have been rising at an ever-growing rate each year since 1997.



Signing of a 640 MW contract (from the left): Dr. Hansjörg Müller (Nordex), Matteo Maino (Babcock & Brown), Carsten Pedersen (Nordex)

## FRANCE/PORTUGAL NORDEX RECEIVES ITS LARGEST-EVER DELIVERY CONTRACT

Nordex has signed a supply framework agreement with one of its key accounts, international investment and advisory firm Babcock & Brown (ASX: BNB). The contract is for the delivery of wind turbines with a total capacity of up to 640 megawatts (MW).

The first agreement instalment entails the delivery of 120 2.3 MW and 2.5 MW N90 turbines with a combined capacity of 289 MW. We will be installing these turbines in Portugal and partially also in France on a turnkey basis for Babcock & Brown, and will therefore be undertaking the foundation works, substation and electrical installations prior to final delivery.

In addition, the contract provides for options for a further 100 turbines of the same model (up to 250 MW) and additional projects totalling 100 MW which we have developed in France. All the turbines are to be delivered over a period commencing in mid 2008 through to 2011.

“We are very happy that Babcock & Brown has chosen us as one of their key suppliers for their European projects. Such a large and long-term agreement with one of the largest players in the wind business is an important milestone in continuing our growth path of around 50% each year,” says Carsten Pedersen, COO Sales and Marketing at Nordex AG.

## SWEDEN

# SUCCESSFUL RE-ENTRY INTO THE SWEDISH MARKET

Nordex has made a successful return to the Swedish market with two major contracts. The two wind farms with installed capacity of 35 and 15 megawatts, respectively, have a combined value of EUR 47 million. "We owe this success to our new branch in Sweden," says Carsten Pedersen, COO Sales and Marketing at Nordex AG. "Nordex had retreated from Sweden in 2003 as the market did not generate sufficient business. In August 2006, the team re-established operations in Uppsala near Stockholm."

The new contracts prove that we were right to take this step. Work on constructing the Bondön wind farm is to commence at the end of 2007. Comprising 14 N90/2500 kW turbines, the project is being executed for Danish developer Global Green Energy. Nordex is selling the second project—Huds Moar—to Rabbaldshedde Kraft, established in 2005. The six N90/2500 kW turbines are to go into operation at a site north of Gothenburg in spring 2008.

This year, we will be recruiting project managers and service staff for the Swedish branch. Explains Pedersen: "We expect to receive further contracts in the near future and want to reinforce our local team to handle the projects more efficiently. We have in the N90/2500 an ideal turbine for wind speeds in Sweden, and are now offering a modified climate version of this model." This will ensure production in sub-zero temperatures of up to -20 degrees.

The strong demand for wind turbines in Sweden is being driven by the obligation which has been imposed on utilities to generate at least 16% of their output from renewable sources. At the same time, the prices of wind-generated electricity are tied to spot electricity prices, which are currently rising, as well as the price of traded green certificates. The price of electricity in the Scandinavian Nordpool electricity exchange rose by almost 40% in 2006.



## UNITED STATES

### INTERNATIONAL PATENT PENDING FOR NEW CONTROLLING TECHNOLOGY

At the same time as our participation in Windpower 2007 in Los Angeles in June, we also assembled our first N90/2500 in Hewitt, Minnesota, thus completing our first multi-megawatt project in the United States on schedule. The turbine features all the latest detail solutions such as the new optimised “Nordex AP” control system. Two closely linked controllers – the momentum controller and the pitch con-

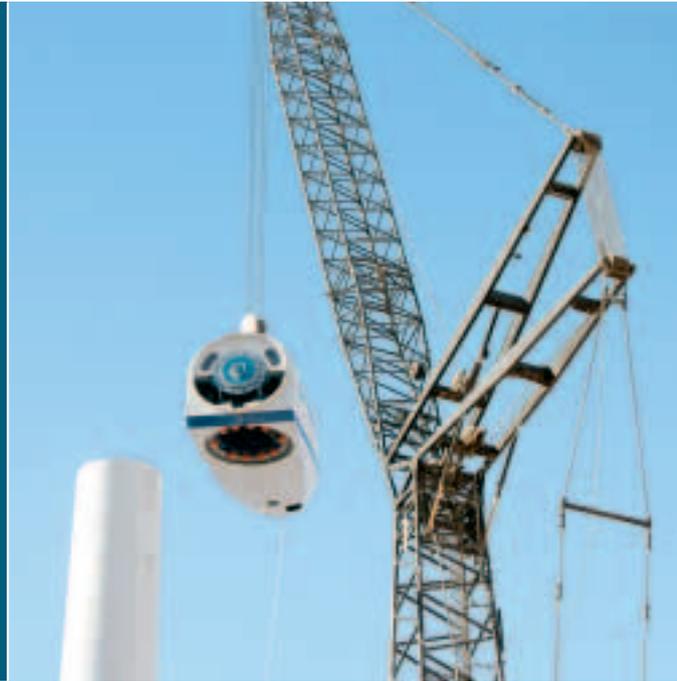
troller – improve the controlling properties, optimise the hysteresis behaviour and cover special operating conditions. We have applied for international patents for the latest enhancements to the Nordex Control 2 software system.

The N90/2500 is able to supply close to 1,700 four-person households with clean electricity derived from the wind. This makes the turbine one of the most powerful wind systems ever to be constructed in the United States. Our aim is to offer this proven turbine model in the US market in the future. Looking forward to next year, we want to implement a further project comprising 21 turbines here in Minnesota. At the same time, we will start building up local structures in the United States in preparation for the first major deliveries, which we expect in 2009 and 2010. In other words, we want to set up production facilities and create jobs in the United States as well. Accordingly, the N90/2500 in Minnesota marks a great step forward in Nordex’s efforts to return to the US market.





## CHINA TURBINE ASSEMBLY IN FULL SWING



In the wake of a new renewable energies act adopted in China in spring 2005, demand for wind turbines has risen enormously. Most tenders are for large-scale projects and multi-megawatt systems. Thus, in conjunction with our joint venture partners we are currently assembling turbines for projects with a total capacity of more than 145 MW in the provinces of Shanghai, Ningxia and Jilin. The turbines being deployed are the S70 and S77, each with an installed capacity of 1.5 MW. To date, these turbines have only been produced and erected in Europe. Now, however, they are also being produced locally for the Chinese market.

Currently, our largest projects are to be found in the province of Ningxia, not far from the headquarters of Nordex's joint venture in Yinchuan. There, a total of 54 turbines are being assembled for the Helanshan 1 + 2, Qingtonxia and HonSibu wind

farms. At the same time, 33 cold-climate S77 turbines will be producing clean energy for our customer Datang Jilin Rulfeng Electric Power Generation Co. in the province of Jilin Taonan in the north-east. We are also supplying ten S70 turbines for a wind farm located on the island of Chongming, which belongs to the province of Shanghai.

According to experts, China will be the second largest wind power market in terms of new installations after the United States by 2011. We are prepared for this growth. As recently as in January 2007, we opened our new rotor blade production facility in Dongying. In the future, all the turbines which we produce in China will be fitted with rotor blades produced in this factory. This year, 225 blades are to be produced, with this output capable of being increased to up to 800 in the foreseeable future.

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## ADJUSTMENTS TO FEED-IN TARIFF SYSTEMS

In the established volume markets of Spain and Germany, new business is set to remain at a high level. In addition, there are plans in Germany revise the feed-in tariff system. However, the discussion to date on amendments to the Renewable Energies Act does not point to any fundamental change in

the funding system. In Spain, the government reorganised the remuneration rates for wind power at the end of May. As expected, the rates were lowered slightly but this should result in steady market conditions.





## WE ARE REPRESENTED WITH OFFICES AND SUBSIDIARIES WORLDWIDE

### **Nordex AG**

Bornbarch 2  
22848 Norderstedt, Germany  
Phone: +49 40 50098-100  
Fax: +49 40 50098-101  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Sales Nordex Energy GmbH**

Bornbarch 7  
22848 Norderstedt, Germany  
Phone: +49 40 50098-490  
Fax: +49 40 50098-491  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Service Nordex Energy GmbH**

Bornbarch 7  
22848 Norderstedt, Germany  
Phone: +49 40 50098-209  
Fax: +49 40 50098-301  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex Energy GmbH**

Erich-Schlesinger-Strasse 50  
18059 Rostock, Germany  
Phone: +49 381 4020-300  
Fax: +49 381 4020-339  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex Energy GmbH**

C. F. Tietgens Vej 10  
6000 Kolding, Denmark  
Phone: +45 75 73 44 00  
Fax: +45 75 73 41 47  
E-mail: [denmark@nordex-online.com](mailto:denmark@nordex-online.com)

### **Nordex Energy GmbH Sweden**

Technosite, Smedsgränd 3  
953 20 Uppsala, Sweden  
Phone: +46 18 84 34 427  
Fax: +46 18 149 830  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex Energy GmbH/Benelux**

It Reidlân 79  
8502 CE Joure, The Netherlands  
Phone: +31 513-41 23 54  
Fax: +31 513-41 85 88  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex France S.A.S.**

1, Rue de la Procession  
93217 La Plaine Saint-Denis, France  
Phone: +33 155 93 43 43  
Fax: +33 155 93 43 40  
E-mail: [france@nordex-online.com](mailto:france@nordex-online.com)

### **Nordex Italia s.r.l.**

c/o SLF Commercialisti Associati  
Via Augusto Anfossi 36  
20135 Milan, Italy  
Phone: +39 02 54 10 76 42  
Fax: +39 02 54 11 94 63  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex Energy Ibérica S.A.**

Calle Ausiàs Marc, 23 pral.  
08010 Barcelona, Spain  
Sales Office:  
Pso. de la Castellana, 23 2º-A  
28046 Madrid, Spain  
Phone: +34 91 7000356  
Fax: +34 91 3199388  
E-mail: [spain@nordex-online.com](mailto:spain@nordex-online.com)

### **Nordex China**

Room 808,  
First Shanghai Center, No. 39,  
Liangmaqiao Road,  
Chaoyang District,  
Beijing 100016, P. R. China  
Phone: +86 10 84 53 51 88  
Fax: +86 10 84 53 51 58  
E-mail: [china@nordex-online.com](mailto:china@nordex-online.com)

### **Nordex Energy GmbH**

c/o Thomas Annegg  
Schöffelgasse 4/6  
1180 Vienna, Austria  
Phone: +43 1 615 39 38-10  
Fax: +43 1 615 39 38-20  
E-mail: [info@nordex-online.com](mailto:info@nordex-online.com)

### **Nordex UK Ltd.**

Egerton House  
The Towers Business Park  
Didsbury M20 2DX  
United Kingdom  
Phone: +44 161 445 99 00  
Fax: +44 161 445 99 88  
E-mail: [uk@nordex-online.com](mailto:uk@nordex-online.com)