The German Federal Council has approved the General Administrative Rules for the Identification of Aircraft Obstructions (AVV), making the use of on-demand night-time marking (ONM) mandatory for many German wind turbine operators starting on 1.7.2021. In cooperation with partners, Deutsche Windtechnik has developed an independent ONM system that will enable all operators to retrofit their turbines in compliance with the AVV, see also on page 3.

The service market for wind turbines is still evolving rapidly. The trend towards consolidation shows no signs of slowing down, especially with the disappearance of some turbine manufacturers and the unabated appetite of larger companies to acquire smaller and medium-sized market participants. What exactly is happening and what are the effects on the market and particularly on the operators?

Growth per se is a natural phenomenon – many individuals and organisations strive for it. Parameters such as speed, health, market, climate, place, time, resilience and many other factors are decisive for the quality of growth. According to economic theory, a healthy market structure can only develop when there is lively competition between a sufficient number of market participants and enough diversity. For this reason, operators of wind turbines benefit from a dynamic and diverse structure of service providers. For a long time, however, the equipment manufacturers themselves were almost the only ones who were able to provide maintenance for their products. Not surprisingly, the service market showed almost monopolistic structures in its first years. Precisely this development provides a simple explanation why there is a rapidly accelerating trend towards independent service and "self-performing": the market, and more specifically the operators of wind turbines, urgently need competition and alternatives. These are the only conditions under which significant progress, improvements, price reductions and more diverse solutions can be achieved.

"A counterweight in the market is important."

In 2019, Deutsche Windtechnik signed new service contracts for 1,175 wind turbines with various turbine technologies worldwide. Approximately half of these are in Germany. "We can look back on another successful year for independent maintenance," said Matthias Brandt, Director at Deutsche Windtechnik. "Despite the extremely tense situation regarding wind energy expansion in Germany, we were able to continue to grow. A number of factors contributed to this, including the strong growth of our international services in the offshore business area as well as our business with Senvion and Gamesa."

LATEST NEWS

ONM SYSTEM DEUTSCHE WINDTECHNIK SECURES FEED-IN TARIFFS

The German Federal Council has approved the General Administrative Rules for the Identification of Aircraft Obstructions (AVV), making the use of on-demand night-time marking (ONM) mandatory for many German wind turbine operators starting on 1.7.2021. In cooperation with partners, Deutsche Windtechnik has developed an independent ONM system that will enable all operators to retrofit their turbines in compliance with the AVV, see also on page 3.
Dear Readers,

The focus of this issue of luftpost is on growth in the service market. For years, we have all seen ongoing consolidation in this segment, and the latest example comes directly from our company: the acquisition of GFW by Deutsche Windtechnik. Why is the management of both companies taking such a momentous step? Why are strong ISPs (independent service providers) so important for all market participants? And how do you design the process when two companies with strong identities of their own decide to merge? It is essential to look closely in order to preserve the best of both companies. For Deutsche Windtechnik and GFW, it is important to ensure as much harmonisation as possible, but also as much individuality as necessary.

We are very pleased to have Jürgen Fuhrländer and his extremely experienced staff at our side with immediate effect. Read an interview with him to find out why he himself took the step to become part of Deutsche Windtechnik.

Best regards,

Severin Mielimonka and Holger Hämel
Managing Directors Deutsche Windtechnik X-Service

countries during their own growth and opened up new markets with new technologies, Deutsche Windtechnik was happy to be a trusted partner. Accordingly, a large number of new employees were integrated, new country units established, locations opened and service companies acquired.

Deutsche Windtechnik most recently acquired the service provider GFW in January 2020, and this is a good example of external growth because GFW has retained its identity and quality. The two companies had already worked together on many projects with a wide range of requirements, and both companies drove the merger forward in order to be able to develop additional capacity.

Many new smaller, valuable start-ups with a focus on specific areas of expertise also repeatedly help to promote the necessary competition in the service market. They and Deutsche Windtechnik form an important counterweight in a market that is still very much dominated by manufacturers.

The name Fuhrländer is well known in the wind industry. Before Jürgen Fuhrländer switched to the service sector as managing director of GFW Gesellschaft für Windenergieanlagen, he and his brother Joachim had built up the Fuhrländer company to manufacture wind turbines, and he was the head of engineering there for a long time. On 01.01.2020, GFW became a 100% subsidiary of Deutsche Windtechnik.

Mr Fuhrländer, why did you sell your company? Isn’t it best to be your own boss?

If you are used to building up, managing and watching a company grow, you are of course always your own boss. But there is always more to it than that, and you have to be able to find new ways to improve and deliver your services. In Deutsche Windtechnik I have found a partner that is still very customer-oriented, despite its considerable size. The company understands the requirements for employees and knows that good service must be backed up by people with many years of experience. I feel very comfortable with my new position and the company situation!

In which areas will there be particularly close cooperation?

GFW’s main focus is on standard turbine service, repair orders and expert services with our own engineering office. But troubleshooting, sales of parts and innovative engineering are also part of our work. Our technological focus on Fuhrländer, Senvion and Nordex optimally complements the portfolio and multi-brand expertise of Deutsche Windtechnik. This will enable us to combine our capacities and bolster ourselves for international growth.

Will there be changes for GFW’s customers?

The name GFW will be retained for the time being and existing contracts will continue to run normally. In terms of service quality, we expect many positive effects for both sides. GFW now has access to many new resources, but it will also do its part, for example in the areas of spare parts management, engineering or the expansion of the service network. Overall, a win-win situation for all parties involved.

“Our system expertise and services complement each other ideally.”

ARTIFICIAL BARRIERS PREVENT COMPETITION

For this competitive mechanism to function even better, great care must be taken to ensure that manufacturers do not lock down the service market with artificial barriers that prevent access to control systems and data. This approach prevents free competition and drives costs up unnecessarily. Awareness of the negative consequences of locked-down systems is increasing. Other industrial sectors are far more advanced in this respect, and this provides significant benefits for operators.
ONM SYSTEMS

WINDTESTFELD-NORD TO INSTALL DEUTSCHE WINDTECHNIK’S ONM SYSTEM

Deutsche Windtechnik will be installing the system it developed for on-demand night-time marking – ONM for short – on the wind turbines at Windtestfeld-Nord near Husum. The 150-hectare site with six different turbine technologies from different manufacturers (Enercon, Nordex, Senvion, GE, Siemens and Skywind) offers ideal conditions for rolling out the radio-controlled ONM solution across the entire wind farm. One of the main features of the ONM system developed by Deutsche Windtechnik is its high versatility: 1. It functions independently of the turbine technology, i.e. it can be installed in the test field in all turbines. 2. It processes the incoming signals regardless of the source (radar or transponder-based). 3. It functions independently of the existing wind farm infrastructure and its communication network. It is also designed for reliable documentation and ONM operations management. The tests, which include fine-tuning the receiver, the signal transmission and the antennas used, will wrap up the development work on the ONM system.

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WHO CARRIES OUT THE SERVICE FOR WIND TURBINES?

PERSONNEL NEWS

DIEGO BOTERO GARCÍA COMBINES DIFFERENT AREAS OF ACTIVITY

The new Country Manager for the Spanish market is a trained electronic engineer who held multiple positions within the international renewable energy sector before joining Deutsche Windtechnik. In addition to managing employees, the 47-year-old Colombian considers his role to be that of a manager for knowledge transfer with the other country units. The recent record figures in the Spanish wind market also require further development of existing structures in order to maintain the high level of service provided to customers.

PARTNER

SUBSEA INSPECTIONS WITH BLUESTREAM

Deutsche Windtechnik has been working successfully with Bluestream Offshore BV since 2018. The company boasts extensive expertise in the offshore and subsea areas for the oil, gas and offshore renewable industries in addition to providing a wide range of services above as well as under water. The services provided by Bluestream are centred around surface-demand diving, remotely operated vehicles (ROVs), rope access and unmanned aerial vehicles (UAVs). The company complements the subsea inspection services provided by Deutsche Windtechnik with ROVs and other diving services. The professional cooperation, state-of-the-art equipment and high-quality reporting were key reasons for the partnership agreement that was signed in 2019. Deutsche Windtechnik inspected 143 wind turbine foundations with support from Bluestream in an efficient, smooth, safe and professional manner. Find out more about Deutsche Windtechnik’s subsea clustering concept here.
GETTING ACQUAINTED

15 YEARS IN THE WIND INDUSTRY AND NO END IN SIGHT!

Wen-Lai Tien is the first Chief Engineer at Deutsche Windtechnik Co Ltd. in Taiwan. In this interview, the enthusiastic wood craftsman told us about his experiences in the wind industry in Taiwan.

When did you start working in the wind industry?
I started more than fifteen years ago as a service technician for Enercon E40 systems in Taiwan. I felt very comfortable in the industry right from the word go. People are very friendly and open with each other, and it is generally a lot of fun. I have stuck with wind energy ever since and have worked for Enercon and Vestas in Taiwan.

How does Deutsche Windtechnik differ from other companies you already have experience with?
For me, Deutsche Windtechnik stands for high quality work and a wealth of experience in full service, offshore as well as onshore. In my view, the working environment is very special: there are flat hierarchies, the decision-making paths are short and employees have many opportunities to make their own decisions. For this reason, I am very pleased to further develop our O&M projects in Taiwan.

What do you think are the difficulties in Taiwan?
Probably the biggest internal challenge is to integrate ourselves into Taiwanese culture as quickly as possible and to find partners to build a local supply chain. For the entire industry in Taiwan it is definitely a challenge to find suitable and, above all, experienced employees. But I am confident that we will find a way.

ON THE RADAR

WIND O&M EU
05.-06.03.2020 | MUNICH
events.newenergyupdate.com/wind-operato-
tions-maintenance-europe/

3. MITTELDEUTSCHER WINDBRANCHEntag BWE
10.03.2020 | ERFURT
bwe-seminare.de/veranstaltungen

BELGIAN OFFSHORE DAYS
18.-19.03.2020 | OSTEND
belgianoffshoredays.be

WINDBRANCHEntag SCHLESWIG-HOLSTEIN BWE
27.05.2020 | HUSUM
bwe-seminare.de/veranstaltungen

SPOTLIGHT

VIDEOS NOW AVAILABLE IN MULTIPLE LANGUAGES!

Deutsche Windtechnik’s international growth is also reflected in its increasing cultural and linguistic diversity. An increasing number of individual contributions in French, Dutch, Swedish, Mandarin and various other languages can now be found on our channels.

AN INTERNATIONAL HIGHLIGHT

After the successful start of our video series “Deutsche Windtechnik Backstage”, we have added English voiceovers to the existing subtitle translations and hope we have once again increased the entertainment factor for our international audience. Our video clip about the job of an offshore service technician has been translated into another language: in addition to the English original, the video is now also available in Mandarin.

The third episode of our Backstage series can be viewed on our YouTube channel! This time it’s all about the apparent magic that drives wind turbines and somehow seems to have got out of balance. You can see how to get it under control again in the video:

QHSE INTERNATIONAL

GLOBAL GROWTH PLACES DEMANDS ON QUALITY AND SAFETY

Deutsche Windtechnik’s growth is evident in all business areas. As a result, the requirements for quality management and occupational safety (QHSE) are also increasing as a result of internationalisation. In order to leverage synergies between the QHSE managers in the various countries, Deutsche Windtechnik is developing a company-wide software system for recording data relevant to quality and HSE (Incident Management System, IMS). The system is intended to simplify the international exchange of information in the event of occupational safety incidents even further and to tap into the potential for improving the quality of our services. “The systems are just one example of how we work to combine experience and expertise from all countries. One of our greatest strengths is being able to participate in complex market and customer structures to drive harmonisation forward, but without losing agility and flexibility,” said Director Matthias Brandt.

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