

## Overview-Turkish Market

The Turkish market has evolved significantly since the start of operation of its first private wind farm (30 MW) in Bandırma in 2006. Today the country has exceeded the 2,000 MW installed (and in operations) capacity of energy provided by wind turbines.

Turkey ranks in the top 20 percent (22 %) in terms of installed capacity in Europe. Of the 39 countries, Turkey is number 11 in terms of top wind energy producers. Only 80 MW kept Turkey from being in the 10th place. In Eastern Europe, only Poland has a higher installed capacity than Turkey. It is my view that Turkey will move in the top 10 within the course of 2013. As you look at the neighboring countries of Turkey (including Eastern Europe), Turkey's wind energy policies are among the most stable.

With strong new installed annual average MW of 450+ since 2009, proving that the industry in Turkey has reached a most important milestone: general level of comfort. In my view, the next critical milestones that lie ahead for Turkey include process-oriented project development and developing a local competencies and expertise in its market.

Process-oriented project development means that the development should be planned as a 4-7 years completion timeline. In order to develop a project methodically, as with all projects, a team is required. The core members of the team should include:

- Project Manager (leader of the project)
- Governmental Liaison
- Grid Connection Professional
- Construction Professional
- Financial/Budget professional.

While some project owners may not have all of the team/expertise in-house, it is critical that they seek consulting assistance. The next important point and probably the most critical is, allocating a budget to the project. Cost control of projects in development is critical to the success of the project. While it may be easy to think that it can all done in-house, it is also important to get external support to validate your works on the project.

A project without proper wind data is not a project worth investing in. That being said, It is my experience that the long the measurement campaign the higher the confidence you can have in your project. Although the law requires one year of measurement, it would be much better if a minimum of two years was achieved? Let's consider how a company looks at and judges its performance over a minimum period of two years. Whether it is compared over month by month, or quarter by quarter, performance is measured by not only forecasted data, but also historical data. In the same manner, in order to get a good indication on how a wind farm could produce with some level of confidence, I think it is worth considering at least two years of measurement.

Development of local competencies and expertise is critical to the survival and growth of any industry in every country. The main point here is that support for local consultancy and engineering companies in the Wind industry is how local knowledge and expertise will grow. This means that rather than outsourcing only to international companies, it is also necessary to use local companies as well. I would like to suggest that credible local companies should be the first choice in all projects and international companies should be considered second. This would benefit the Turkish wind industry by keeping the return on experience i.e. lessons learned i.e. expertise gained from projects in the country.