

## **Wind power has increased by 175 MW in Spain in 2013, the lowest rate of growth in 16 years**

- The installation of a total of 928 MW authorised by the Government has been refused as a consequence of the ongoing Energy Reform
- Despite this insignificant increase in power, wind energy was the first source of electricity for the Spanish consumers in 2013

**Madrid, January 28th 2014.** The wind sector installed 175 MW in Spain in 2013, up 0.77% on a year-by-year basis. This is the lowest growth rate in the sector since 1997, the year in which it was regulated for the first time in the Electrical Sector Law. On December 31st total accumulated power in the sector stood at 22,959 MW according to data compiled by the [Spanish Wind Energy Association \(AEE\)](#).

This installed power is 2,000 MW below the 24,988 MW envisaged in the Renewable Energies Plan (PER) 2011-2020, approved by the Cabinet on November 11<sup>th</sup> 2011 to meet European Directive 28/2009 on renewable energies. The report dated December 17th of last year by the CNMC about the draft Royal Decree on renewables, cogeneration and waste indicates that “certain technologies have far outperformed the targets”, one of the reasons why it justifies to further reduce the compensation of the existing facilities. Self-evidently, this is not the case of wind energy.

The 175 MW installed last year correspond to the latest stings in the tail of the Preallocation Register, the quota set in 2009 by the Government so that only the new farms registered could then receive the compensation foreseen in Royal Decree 661/2007. Notwithstanding, the companies owning 928 MW of that enrolled on said Register have refused to install this power as, owing to the new regulation pending approval in the Energy Reform, major legal insecurity has been generated. In the wake of these refusals, there remains 177 MW yet to be installed and registered on the Preallocation Register which has not specifically refused the construction. The companies will take a decision once the detail of the Energy Reform is known.

Although this Register – created under RDL 6/2009 – ensured the right of farms to charge a certain amount of compensation for 20 years, things have turned around. The Energy Reform dictated by the Government eliminates the rights acquired by the existing installations and imposes a new compensation system on them.

At present, it is impossible to predict the economic impact that the reform will have on the sector as we are still awaiting the Ministerial Order which will set the parameters that form the basis for stipulating the new economic conditions. Notwithstanding, the changes already made in Royal Decree 9/2013, Law 24/2013 regarding the Electrical Sector (already in force) and the draft Royal Decree on renewables (pending approval) - along with the economic impact of other standards not related with the wind sector but which will entail an economic loss (such as the Interruptability Order and the draft Royal Decree on capacity payments) - it is estimated that the impact will be disproportionate and will have devastating effects on the sector. Hence, the refusal to install new farms even though they are registered and the companies have already invested money in them.

### **The balance by regions**

According to data obtained by [AEE](#), which monitors all the companies in the sector in Spain and uses the criterion of the final operational act to make its calculations, the region where the most megawatts were installed in 2013 was Andalusia (see table).

### Installed capacity by regions in 2013

REGION	Accumulated capacity by the end of 2012 (MW)	Installed capacity in 2013	Accumulated capacity by the end of 2013 (MW)	% over total	Total wind farms (*)
Castilla y León	5,510.61	49.40	5,560.01	24.22%	241
Castilla-La Mancha	3,806.54		3,806.54	16.58%	139
Andalucía	3,263.23	74.50	3,337.73	14.54%	153
Galicia	3,311.47	2.65	3,314.12	14.43%	158
Aragón	1,888.81	4.50	1,893.31	8.25%	87
Cataluña	1,258.05	9.00	1,267.05	5.52%	46
Comunidad Valenciana	1,188.99		1,188.99	5.18%	38
Navarra	979.92	24.00	1,003.92	4.37%	49
Asturias	512.45	6.00	518.45	2.26%	21
La Rioja	446.62		446.62	1.95%	14
Murcia	261.96		261.96	1.14%	14
Canarias	160.11	5.00	165.11	0.72%	55
País Vasco	153.25		153.25	0.67%	7
Cantabria	38.30		38.30	0.17%	4
Baleares	3.68		3.68	0.02%	46
<b>TOTAL</b>	<b>22,783.97</b>	<b>175.05</b>	<b>22,959.02</b>		<b>1,072</b>

Source: AEE

(\*) It includes extensions and experimental wind farms

The developer that installed the most power in 2013 was Enel Green Power (with 88.27 MW), followed by Acciona Energía, EDPR and Gamesa (see table).

## Distribution of installed and accumulated wind capacity by developers in 2013

DEVELOPER	Installed capacity in 2013 (MW)	Accumulated capacity by the end of 2013 (MW)	Market share over total installed (%)
<b>IBERDROLA</b>		5,513.07	24.0%
<b>ACCIONA ENERGÍA</b>	39.00	4,267.82	18.6%
<b>EDPR</b>	13.23	2,099.15	9.1%
<b>ENEL GREEN POWER ESPAÑA</b>	88.27	1,491.55	6.5%
<b>GAS NATURAL FENOSA RENOVABLES</b>		968.00	4.2%
<b>EOLIA RENOVABLES</b>		512.95	2.2%
<b>EyRA</b>		512.56	2.2%
<b>VAPAT</b>		471.25	2.1%
<b>RWE Innogy Aersa, S.A.U.</b>		442.71	1.9%
<b>OLIVENTO, S.L.</b>		420.79	1.8%
<b>ENERFÍN</b>		400.41	1.7%
<b>E. ON Renovables</b>		380.61	1.7%
<b>BORA WIND ENERGY MANAGEMENT</b>		329.99	1.4%
<b>MEDWIND (*)</b>		246.75	1.1%
<b>RENOVALIA RESERVE</b>		246.10	1.1%
<b>MOLINOS DEL EBRO</b>		234.25	1.0%
<b>GECAL, S.A.</b>		231.41	1.0%
<b>GAMESA ENERGÍA</b>	9.50	219.45	1.0%
<b>IBEREÓLICA</b>		194.30	0.8%
<b>EÓLICA DE NAVARRA</b>		164.13	0.7%
<b>ALDESA ENERGÍAS RENOVABLES</b>		164.05	0.7%
<b>FERSA</b>		148.90	0.6%
<b>ELECDEY</b>		140.10	0.6%
<b>OTHERS</b>	25.05	3,158.74	13.8%
<b>TOTAL</b>	<b>175.05</b>	<b>22,959.02</b>	<b>100%</b>

Source: AEE

AEE takes the final operational act as the reference to calculate the installed capacity which, in some occasions, does not match up with the data published by developers.

The total figure by developers is linked to the attributed power according to their shareholding percentage in wind farms.

(\*) Renomar has a total of 493.5 MW. Acciona owns 50% of this company, so the table only reflects the 50% owned by Medwind.

In terms of manufacturers, the wind turbines of Gamesa totalled the most power (85.50 MW), followed by those of Acciona Windpower (70.50 MW).

**Distribution of installed and accumulated wind capacity  
by manufacturers in 2013**

MANUFACTURER	Installed capacity in 2013 (MW)	Accumulated capacity by the end of 2013 (MW)	Market share over total installed (%)
<b>GAMESA</b>	85.50	12,008.09	52.3%
<b>VESTAS</b>	2.00	4,076.99	17.8%
<b>ALSTOM</b>	2.55	1,739.09	7.6%
<b>ACCIONA WIND POWER</b>	70.50	1,728.63	7.5%
<b>GE</b>		1,413.14	6.2%
<b>SIEMENS</b>		772.30	3.4%
<b>ENERCON</b>		515.05	2.2%
<b>SUZLON</b>		218.00	0.9%
<b>NORDEX</b>		183.38	0.8%
<b>DESA</b>		100.80	0.4%
<b>LAGERWEY</b>		37.50	0.2%
<b>M-TORRES</b>	9.90	46.80	0.2%
<b>KENETECH</b>		36.90	0.2%
<b>SINOVEL</b>		36.00	0,2%
<b>REPOWER</b>		25.00	0.1%
<b>EOZEN</b>	4.50	4.50	0.0%
<b>NORVENTO</b>	0.10	0.30	0.0%
<b>ELECTRIA WIND</b>		0.15	0.0%
<b>WINDECO</b>		0.05	0.0%
<b>OTHERS</b>		16.37	0.1%
<b>TOTAL</b>	<b>175.05</b>	<b>22,959.02</b>	<b>100.0%</b>

Source: AEE

Despite this insignificant increase in power in 2013, for the first time in history wind energy took its place as the no. 1 source of electricity in Spain in a full year, accounting for 20.9% of demand according to data from the Spanish System Operator - REE. Spain is the first country in the world where this has occurred. However, according to **AEE** estimates based on the data made available by CNMC and REE,

wind energy incentives represented only 11.4% of the total regulated costs of the electrical system in 2013 and they received 25% of the incentives under the Special Regime.

This data bears testimony to the seriousness and thoroughness with which the wind sector has developed in Spain – always in accordance with the objectives of the regulator – until becoming the no.1 technology in the system, entailing a cost which is always controlled and efficient. This is why **AEE** thinks the regulatory mistreatment of the sector in the context of the Energy Reform is incomprehensible and it never tires of reaching out to the Government to get round the situation and work towards a standard that ensures the survival of a key industrial sector for Spain which is admired worldwide.

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