



Wind Industry Salary Survey

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Eurostaff Group Limited
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Introduction

Eurostaff provide recruitment services to the Global Wind Energy sector through a network of offices and international specialists. With a growing team of 12 consultants we are organised into a number of specific units that supply separate elements of the supply chain.

With experience of placing in over 30 countries, and a candidate network of over 13000 Wind related consultants, we are the leading specialist supplier to the Wind Energy sector.

Salary Survey

As recruitment consultants we spend most of our time talking to and meeting people who are actively involved in recruiting into the Wind Energy sector. As a dynamic and fast growing business we identify with many of the companies in this sector and fully appreciate that to innovate the main ingredient is people.

This document intends to provide a backdrop to median salaries across the sector based on Eurostaff placement information and salary information gathered from a sample across the 13,000 Wind Professionals currently registered with us.

The EWEA has said that the Wind Energy sector now employs 192,000. The trade association expects this to grow to 280,000 employees by 2015 and then 450,000 by 2020.

Christian Kjaer, chief executive of the EWEA, said: "The European Wind Energy Association expects strong growth in wind energy employment in Europe over the coming years to 280,000 by 2015 and 450,000 by 2020.

That's on average, 450 new European wind energy jobs per week over the next decade." It is evident that the growth in this sector is similar in its patterns to that of the Mobile/Semi Conductor boom of the mid to late 1990s and the Petrochemical sector in the 1970s. The reality is there simply isn't enough resource to go around.



Background

Within Europe there are a number of key drivers at play which should sustain this revolution and ensure that momentum is maintained.

Offshore

The growth potential of Offshore is leading main observers of the sector to state that with the right investment the UK could become a net exporter of energy by 2030. Something that currently seems unlikely due to the number of Nuclear facilities and Coal fired stations coming offline and the reduction in output from the North sea gas fields.

We are already seeing investment by a variety of companies from the large developers who are involved in large scale Offshore farm construction such as RWE and Dong, who have been very actively looking for contract and permanent resource to support developments such as Gwynt Mor (577MW) and the London Array (1GW).

In addition to these companies many feeder companies supplying specialist expertise in EPC (Fluor, KBR), Consulting (MottMacdonald, Atkins, Garrad Hassan) have been continuing to strengthen their wind energy capabilities.

If the required levels of long term financial investment can be achieved, coupled with extensive innovation within transmission technology, offshore logistics and turbine R&D, then the development of this sector will continue to grow.

Turbine R&D

The growth of this sector is clearly driving the recruitment activity within the mainland Europe market. Within this sector, the development of the 'holy grail' the most cost effective, reliable solution with maximum output is seeing new entrants to the European market (Clipper Windpower, Mitsubishi Power Systems). The massive upscaling of activity (Siemens, Vestas). It has also seen some M&A activity with GE buying the offshore turbine manufacturer Scanwind and Suzlon's stake in Repower.

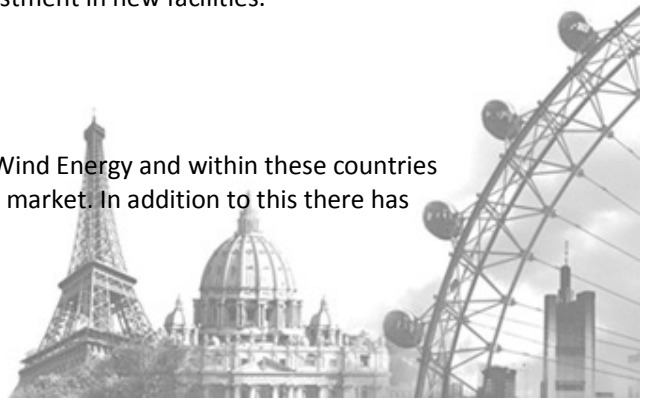
This part of the sector most definitely has parallels with the mobile telecommunications sector with large R&D expenditure to invest in the long development of the most attractive and marketable solutions. The need for highly skilled research and conceptual mechanical and electrical engineering skills has increased over the past 12 months

Manufacturing and Production

Specialist manufacturing and process orientated roles have seen a dramatic increase as Turbine Manufacturers and component suppliers in areas such as Blade Technology, Gearboxes, Towers and Bearings, increase their manufacturing presence. Roles for Quality Engineers, Supply chain and sourcing and Composite Design specialists have led to a 'raiding' of mature sectors such as Semi conductors, Aerospace and Automotive. The need to develop facilities that are accessible, within the sphere of educated talent and government subsidies has seen a number of companies commit to hundreds of millions of pounds worth of investment in new facilities.

Resource Mobility

Denmark, Spain & Germany have been the pioneers of Wind Energy and within these countries exist a number of companies that dominate the Turbine market. In addition to this there has



been an emergence of players from India, China and the USA. The increased global nature of the Wind market is seeing a high degree of resource mobility supported by a willingness by the manufacturers to support Visa sponsorship and offer attractive relocation support. In addition to this the more mature players ceding resources who are looking to experience a new country and culture.

Supply Chain

The growth of the Wind Energy sector is providing extensive opportunities for the supply of components and consulting services. As all companies have different supply chain strategies there is a shift towards insourcing expertise and technology, to meet the demand that the sector is showing. A significant number of companies are increasing their recruitment budget to ensure that they are competitive and adaptable to their customers.



Salary Survey

As one of the Worlds leading recruitment companies active in the Wind Energy sector, it is important that the industry has feedback taken from the delivery stage. This sample is drawn from a sample of 30 permanent placements drawn from 8 Turbine manufacturers, 7 component manufacturers and 10 consultancies or developers. In addition to this we have drawn on the information from 50 qualified candidate salary responses.

Placements were made in the following countries

- UK
- Denmark
- Germany
- Italy
- Spain
- Sweden
- China
- Singapore

The sample of placements covers individuals placed into the following positions

- Composite Design Engineer
- Quality Manager
- Supply Chain Director
- Head of Offshore
- Electrical Engineer
- Loads and Controls Engineer
- IP Engineer
- R&D Project Managers
- Blade Design Engineers
- Product Development Engineer
- Wind Analyst
- Power Systems Engineer
- Gearbox Design Engineers
- Project Manager – Civils
- FE Analysts
- Offshore Foundations Design Engineers



Salary Considerations

To provide a degree of balance in determining a median salary range, it is clear that we are working within a global employment market, with varying degrees of ambiguity relating to : The sample countries have differing levels of taxation with Denmark being at the higher end of scale and Singapore operating at the lower end. In most instances when qualifying candidates salary expectation we have placed a focus on the NET element of the salary and factored in Mercers advice relating to ‘Benchmarking policies and costs”. This focuses on

- Expatriate Allowances, including cost of living, hardship, mobility, premiums and allowances
- Localization
- Per diem, allowances and benefits for short term assignments
- Return on investment of international assignments
- Outsourcing
- Commuters
- Support provided to assignee and family members before, during and after assignments



Salary Scale

	Annual Base Salary	OTE	Total
Project Management			
Low	€ 53,555	€ 6,050	€ 59,605
Mid	€ 63,550	€ 7,505	€ 71,055
High	€ 76,050	€ 8,205	€ 84,255

	Annual Base Salary	OTE	Total
Electrical Engineering			
Low	€ 43,658	€ 4,177	€ 47,835
Mid	€ 52,550	€ 5,098	€ 57,648
High	€ 61,050	€ 6,105	€ 67,155

	Annual Base Salary	OTE	Total
Mechanical Engineering			
Low	€ 44,050	€ 4,315	€ 48,365
Mid	€ 55,005	€ 5,108	€ 60,113
High	€ 62,980	€ 6,705	€ 69,685

	Annual Base Salary	OTE	Total
Quality and Process Management			
Low	€ 46,489	€ 4,805	€ 51,294
Mid	€ 51,890	€ 5,011	€ 56,901
High	€ 58,980	€ 6,250	€ 65,230

	Annual Base Salary	OTE	Total
Specialist			
Low	€ 50,065	€ 4,805	€ 54,870
Mid	€ 60,125	€ 6,305	€ 66,430
High	€ 68,540	€ 7,708	€ 76,248



Conclusion

The market dynamics of supply and demand will see an increasing pressure on Employers to offer 'best in industry' packages to attract the right talent. The competition with the sector is cross border and with a number of companies looking to influence the candidate supply chain through investing in partnerships with Academic establishments, the battle is on.

For more information regarding our services, please contact renewables@eurostaffgroup.com or call us in London on +44 (0)207 803 0606.

Acknowledgements

- 1 BWEA/Renewable UK Website
- 2 Mercer – company website

