



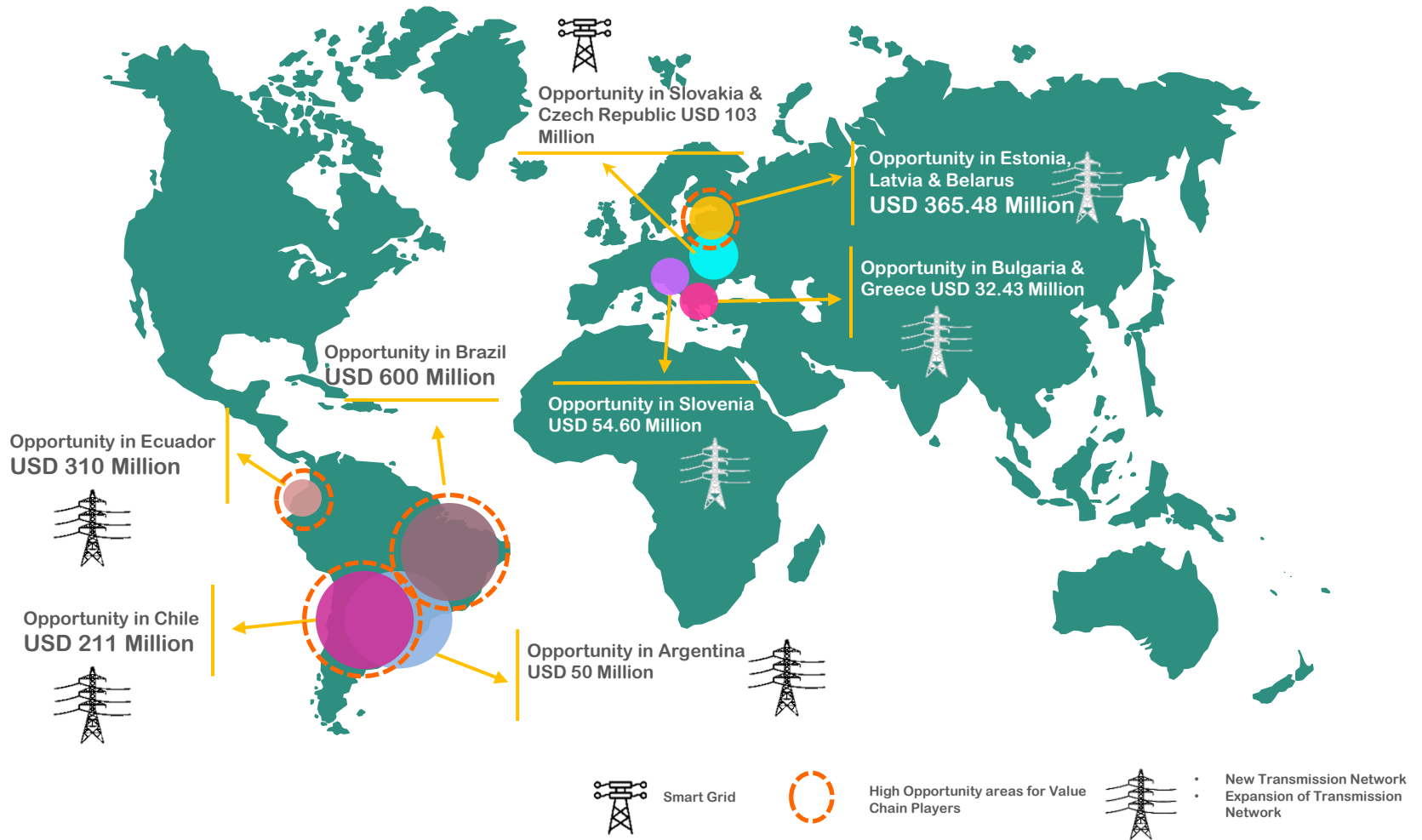
# Power Transmission in Europe & Latin America - 2019

Region Wise Opportunities of Investment & Project Tracker

E-REP Business Series Report

April 2019

# Exhibit 01: Opportunity (USD Million) in Transmission Projects for Value Chain Players in Europe & Latin America



# Why enincon's report on “ Power Transmission In Europe & Latin America - 2019 ”

EU clean energy transition receives an USD 906 million boost out of which around USD 568 million will be used for electricity infrastructure and smart grids.

## Transmission Network in Europe & Latin America

The electricity generated at power plants needs to be supplied to the distribution utilities for which a robust transmission network is very essential. The transmission network in Europe works as a single grid with all major countries connected to each other delivering electric power at high voltages ranging from 220 kV to 1,000 kV. A well connected and upgraded transmission network is very essential as some countries in Europe are trying to phase out thermal & nuclear plants and completely adopt renewable energy for electricity generation. Germany's energy regulator has given a nod to one such project in which high voltage line will send wind power from North sea to southwest consumers in Germany which will help phase out nuclear plant till 2022 and good connectivity will help supplying clean electricity to consumers.

For better connectivity, new inter and intra country transmission networks are being proposed, such initiatives bring business opportunity for many value chain players in the transmission sector. In countries like Estonia, Latvia & Belarus opportunity scale for transmission projects is USD 365.48 Million, Grid upgradation project in Slovakia & Czech Republic brings opportunity of USD 103 Million which are some eye catching projects in Europe. There are few other transmission projects like in Slovenia having opportunity size of USD 54.60 Million and in Bulgaria & Greece catering to opportunity worth USD 32.43 Million.

In Latin America where the transmission sector is not so developed, countries have started investing large amount of funds to make the transmission network robust. Latin America is amongst the world's fastest growing renewable energy markets and already produces more than 200 MW from renewable energy sources like wind, solar and hydropower and supplying this electricity from the power plants requires robust & efficient transmission infrastructure. Countries in Latin America are investing huge funds in order to develop and grow a robust & wide spread transmission network in this region. The opportunity for value chain players in

transmission sector is valued very high in certain countries of Latin America like opportunity assessed in Brazil comes around USD 600 Million, in Ecuador the opportunity scale is close to USD 310 Million, USD 211 Million is the opportunity scale in Chile and in Argentina the opportunity size is USD 50 Million.

The new transmission projects in Europe and Latin America bring a huge opportunity for all the value chain players, the modernization of old power transmission lines due to increase in share of renewable projects also brings new business channels for these players. This report provides comprehensive details regarding the transmission network in Europe & Latin America which gives a vast idea about the present transmission network and the upcoming projects in these continents till 2025. The study is performed region wise for each continent thus, evaluating each and every country and finding out the major opportunity centres in each region till 2025.

## BUSINESS CASE FOR POWER TRANSMISSION INFRASTRUCTURE IN EUROPE & LATIN AMERICA

- USD 568 million allocated by European Union for electricity infrastructure & smart grid projects.
- The Baltic electricity synchronization project which aims to connect the energy markets of Baltic states with the Continental European Network will receive USD 364 million.
- USD 102 million awarded by European Union for ACON SG project which aims to improve grid connection between Slovakia and Czech Republic through the installation of smart grid at their borders.
- European Investment Bank lends USD 112 million to modernise Finland's transmission network.
- Corporacion Nacional de Electricidad (CNEL EP) has announced an investment of USD 310 million to develop its power transmission infrastructure during 2019 in Ecuador.
- Investment of around USD 210.6 million for expansion of transmission network, comprising 47 projects to be done by Chilean national power grid coordinator Coordinador Eléctrico Nacional (CEN).

## REPORT INSIGHTS

- Expansion Plans & Challenges in Power Transmission sector.
- Tracking trends and estimating future capacity addition till 2025 in Northern Europe (U.K, Sweden, Norway, Latvia, Estonia and other countries).
- Tracking trends and estimating future capacity addition till 2025 in Southern Europe (Italy, Spain, Slovenia, Greece & other countries).
- Tracking trends and estimating future capacity addition till 2025 in Eastern Europe (Czech Republic, Belarus, Slovakia & other countries).
- Tracking trends and estimating future capacity addition till 2025 in Western Europe (Germany, France, Belgium & other countries).
- Tracking trends and estimating future capacity addition till 2025 in Mexico, Argentina, Ecuador, Chile & other countries.

## KEY HIGHLIGHTS

- Power Transmission assets development and investment plans.
- Current & Past trends in Power Transmission Sector.
- Future outlook of Power Transmission in Europe & Latin America till 2025.
- Projected Transmission network capacity addition.
- Assessing major opportunity centres.
- Region wise asset track of inter and intra regional transmission lines as per its developer.
- Identifying opportunity (in USD) for upcoming transmission network by FY 2025



## PRESS EXCERPTS

*Germany's Amprion seeks permission for new power line to North Sea*

ET Energy World

*Sterlite Power wins USD 600 million transmission project in Brazil*

ET Energy World

## KEY QUERIES ADDRESSED

- What would be the market size and business potential for the players in power transmission segment?
- What would be the underlying investment tune into the power sector by FY 2025?
- What would be the total opportunity (in USD) for various value chain players in the power transmission segment by FY 2025?
- Identifying region wise areas for developing power transmission infrastructure by FY 2025.
- What is the existing capacity and estimating growth of inter regional power transmission capacity by FY 2025?
- What is the existing capacity and estimating growth of power transmission capacity by FY 2025 in Northern Europe? (U.K, Sweden, Norway, Latvia, Estonia and other countries)
- What is the existing capacity and estimating growth of power transmission capacity by FY 2025 in Southern Europe? (Italy, Spain, Slovenia, Greece & other countries)
- What is the existing capacity and estimating growth of power transmission capacity by FY 2025 in Eastern Europe? (Czech Republic, Belarus, Slovakia & other countries)
- What is the existing capacity and estimating growth of power transmission capacity by FY 2025 in Western Europe? (Germany, France, Belgium & other countries)
- What is the existing capacity and estimating growth of power transmission capacity by FY 2025 in Mexico, Argentina, Ecuador, Chile & other countries?
- What would be the growth track of substations and HVDC terminals till FY 2025?

## MUST BUY FOR

- Power Transmission Utilities
- Power Distribution Utilities (DISCOMs)
- Original Equipment Manufacturers
- Power Traders
- Banks/Financial Institutions/Project Financing Agencies
- EPC Service Providers
- Consultants
- Research Firms/Research Institutions
- Regulatory Bodies
- Government Agencies

## WHAT YOU CAN LEARN ? A SNAPSHOT

- Structural overview and snapshot of power transmission sector in Europe & Latin America.
- Region wise historical trends and power transmission capacity addition forecast till FY 2025 (Europe & Latin America).
- Gaps realized in capacity addition and the allocated targets.
- Region wise tune of investment opportunities in power transmission infrastructure till FY 2025 (Europe & Latin America).
- Major opportunity centres in each region (Europe & Latin America).
- Equipment sourcing trends for power transmission utilities (Europe & Latin America).
- Equipment supplying trends of power transmission utilities from domestic and international manufacturers (Europe & Latin America).
- Funding trends in power transmission sector of Europe & Latin America.
- Region wise smart grid trends, green energy corridors in Europe & Latin America.
- Region wise opportunity track for equipment suppliers, OEMs, EPC players etc. (Europe & Latin America)



# Keep in touch with us

Our Focus, Your Future



## Address

4<sup>th</sup> Floor, World Mark 2, Aerocity, IGI Airport,  
New Delhi 110037, India



## Contact Information

E-mail: [connect@enincon.com](mailto:connect@enincon.com)  
Sales: [sales@enincon.com](mailto:sales@enincon.com)  
Support: [support@enincon.com](mailto:support@enincon.com)



## Telephone

Office Phone: +91 11 6502 1200  
Sales: +91 11 4657 9411  
Support: + 91 11 4909 8300

