

# Mission „Next decade“ – From Electricity to Infrastructure



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# Starting point – PRE's vision for today & tomorrow: „We are the Energy of the City“



- › Since 122 years, we are a reliable partner in **supplying, distributing and producing energy** using up-to-date technologies and processes
- › Our main assets: to run the **electricity grid in Prague**; to serve **more than 700 000 customers**; to operate **>25 MW<sub>p</sub> in PV power**
- › We pursue a **continuous and sustainable growth** through internal initiatives, partnerships and acquisitions



PRE is well positioned and strives to develop **beyond the electricity commodity and grid business**

# A look ahead: Market environment 2020+



## This decade

Mainly driven by energy policy  
and regulation

Expansion of renewable energies through  
subsidies

Exit from nuclear power in Germany

Decline in economic importance of conventional  
power generation

Commodity driven competition

## Next decade

Increasingly market-driven:

- > cost efficiency gains
- > technical innovation
- > changing customer needs
- > changing competitive landscape

Increased competitiveness and market integration  
of renewable energies

Technical innovations driving new business models  
(e.g. e-mobility)

Digitalization and network energy solutions  
(e.g. smart grids)

Customer needs:  
individualization and transaction simplicity

# Bringing in our skill set: Core competence meets market for future infrastructure



## PRE (& EnBW) core competence

**Safe and reliable  
in the planning,  
construction and  
operation of  
complex  
infrastructures**

Competence gaps to be filled with partners



## Infrastructure growth areas



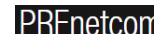
### Smart infrastructure for the customer

Lighting  
Car-sharing  
Decentralized Solutions



### Urban infrastructure

Smart Grid Implementation  
E-mobility  
Broadband/Fiber  
Smart City



### Sustainable generation infrastructure

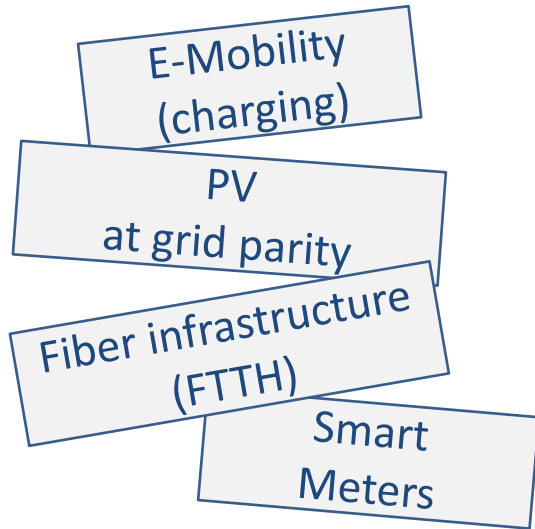
Renewables (PV, Wind)



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# To-Dos: Getting the framework right

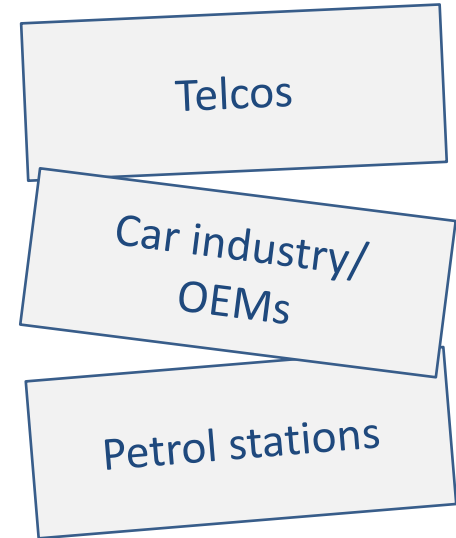
Utilities with their skill sets can add value to society by installing and running **up-to-date technologies**



**Legal frameworks** need to be updated for the next decade to fully use the potential



**Cross-industry partnerships** can help to articulate the needs towards the lawgiver







Energy market visions  
Prague, 20 March 2019