

SUSTAINABLE BUSINESS FORUM

**JADERNÁ ENERGIE JAKO PŘÍLEŽITOST PRO
REGIONÁLNÍ ROZVOJ /**
**NUCLEAR ENERGY AS AN OPPORTUNITY FOR
REGIONAL DEVELOPMENT**





VOJTĚCH KOVAL

MODERÁTOR /
PRESENTER



PROGRAM / PROGRAMME

8:30 - 9:00	Registrace / Registration
9:00 - 9:15	Uvítací projevy / Welcoming speeches
	Roland Bourgeois prezident Francouzsko-české obchodní komory (Saint-Gobain) / President of the French-Czech chamber of commerce (Saint-Gobain)
	Alexis Dutertre velvyslanec Francie v České republice / Ambassador of France to the Czech Republic
9:15 - 10:30	POLITICKÁ DEBATA: Maximalizace přínosů jaderného průmyslu pro region a ekonomiku / POLITICAL DEBATE: Maximising benefits from nuclear industry for region and economy
	Alexandr Vondra poslanec Evropského parlamentu / Member of the European Parliament
	Frédéric Petit poslanec francouzského Národního shromáždění za 7. volební obvod francouzských občanů usazených mimo Francii / Member of French National Assembly for the 7th constituency of the French residents overseas
	Ladislav Havlíček ředitel odboru rozvoje nových jaderných zdrojů Ministerstva průmyslu a obchodu ČR / Director of the Department for the development of the new nuclear units at Ministry of Industry and Trade
	Alexis Dutertre velvyslanec Francie v České republice / Ambassador of France to the Czech Republic
	Martin Hýský zastupitel kraje Vysočina / Representative of the Vysočina region
	Olivier Bard generální ředitel GIFEN / CEO of GIFEN
	Jean-Philippe Ballaz ředitel ekonomického rozvoje Nuclear Valley / Director of the economic development at Nuclear Valley
10:30 - 10:45	Přestávka / Coffee break
10:45 - 12:00	KULATÝ STŮL Č. 1: Maximalizace přínosů jaderného průmyslu pro region a ekonomiku / ROUNDTABLE NR 1: Maximising benefits from nuclear industry for region and economy

Aleš Rod, výkonný ředitel společnosti CETA představí výstupy studie - výsledky dotazníku mezi místními podnikateli a stakeholdery na Třebíčsku o jejich očekáváních od výstavby a odhadovaných ekonomických přínosech novostavby pro ekonomiku jako celek a region. /
Aleš Rod, executive director of CETA will present relevant outcomes of the study – results of questionnaire among local businesses and stakeholders in the Třebíč region on their expectations from the construction and estimated economic benefits of the newbuild on the economy as a whole and the region.

Roman Zdebor - EDF
ředitel pobočky / Branch Managing Director

Dušan Richtár - Czech Export Bank
ředitel odboru finančního obchodu a exportu / Director of Export Finance Department

Dauren Serkebayev - Framatome
odpovědný za nabídku Framatome ve výběrovém řízení na projekt Dukovany 5 / Responsible for Framatome's offer in the Dukovany 5 tender

Michele Delevoye - GE
obchodní ředitelka / Senior Commercial Manager

Josef Perlík - Sigma/CPIA
předseda představenstva / Chairman of the Board of Directors

Anthony De Busschere - VCES - Groupe Bouygues
zástupce generálního ředitele a technický ředitel, místopředseda představenstva / Deputy Chief Executive Officer and Technical Director; Vice-Chairman of the Board of Directors

12:00 - 12:15 Přestávka / Coffee break

12:15 - 13:30 **KULATÝ STŮL Č. 2:** Udržitelná pracovní síla pro český a evropský jaderný program /
ROUNDTABLE NR 2: Sustainable labour force for Czech and European nuclear programme

Andrew Cockroft, senior manažer pro externí vztahy ze společnosti Hinkley Point C představí úsilí, které developer projektu společně se státní správou a místními samosprávami vyvíjí pro získání kvalifikované pracovní síly. / *Andrew Cockroft, Senior Manager - Stakeholder Relations from Hinkley Point C will present the efforts that project developer jointly with state administration and local municipalities have been doing to gain skillful labourforce.*

Sarah Illouz - EDF
vedoucí nabídky EDF Dukovany 5 / Head of EDF's Dukovany 5 offer

Peter Szenasy - EPDOR
zakladatel a generální ředitel / Founder and Managing Director

Lukáš Zedník - Metrostav DIZ
zástupce ředitele; ředitel nabídky Dukovany 5 / Deputy Director; Director of EDF's Dukovany 5 offer

Aleš Dokulil - Nuvia
obchodní ředitel / Commercial Director

František Kural - ZAT
marketingový a obchodní ředitel / Marketing and Commercial Director

13:30 - 14:30 Oběd / Lunch



ROLAND BOURGEOIS

PREZIDENT FRANCOUZSKO-ČESKÉ OBCHODNÍ KOMORY (SAINT-GOBAIN) /
PRESIDENT OF THE FRENCH-CZECH CHAMBER OF COMMERCE (SAINT-GOBAIN)



ALEXIS DUTERTRE

VELVYSLANEC FRANCIE V ČESKÉ REPUBLICE /
AMBASSADOR OF FRANCE TO THE CZECH REPUBLIC





ALEXANDR VONDRA

POSLANEC EVROPSKÉHO PARLAMENTU /
MEMBER OF THE EUROPEAN PARLIAMENT





FRÉDÉRIC PETIT

**POSLANEC FRANCOUZSKÉHO NÁRODNÍHO SHROMÁŽDĚNÍ ZA 7. VOLEBNÍ OBVOD FRANCOUZSKÝCH OBČANŮ USAZENÝCH
MIMO FRANCII / MEMBER OF FRENCH NATIONAL ASSEMBLY FOR THE 7TH CONSTITUENCY OF THE FRENCH RESIDENTS
OVERSEAS**





LADISLAV HAVLÍČEK

**ŘEDITEL ODBORU ROZVOJE NOVÝCH JADERNÝCH ZDROJŮ MINISTERSTVA PRŮMYSLU A OBCHODU ČR / DIRECTOR OF THE
DEPARTMENT FOR THE DEVELOPMENT OF THE NEW NUCLEAR UNITS AT MINISTRY OF INDUSTRY AND TRADE**



ALEXIS DUTERTRE

VELVYSLANEC FRANCIE V ČESKÉ REPUBLICCE /
AMBASSADOR OF FRANCE TO THE CZECH REPUBLIC





MARTIN HÝSKÝ

ZASTUPITEL KRAJE VYSOČINA /
REPRESENTATIVE OF THE VYSOČINA REGION





JEAN-PHILIPPE BALLAZ

ŘEDITEL EKONOMICKÉHO ROZVOJE NUCLEAR VALLEY /
DIRECTOR OF THE ECONOMIC DEVELOPMENT AT NUCLEAR VALLEY



POLITICKÁ DEBATA **POLITICAL DEBATE**

Maximalizace přínosů jaderného průmyslu pro region a ekonomiku /

Maximising benefits from nuclear industry for region and economy

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Jean-Philippe Ballaz

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PŘESTÁVKA / COFFEE BREAK



KULATÝ STŮL Č. 1 Maximalizace přínosů jaderného průmyslu pro region a ekonomiku / **ROUNDTABLE NR 1** Maximising benefits from nuclear industry for region and economy

Aleš Rod

výkonný ředitel společnosti CETA / Executive director of CETA

Roman Zdebor - EDF

ředitel pobočky / Branch Managing Director

Dušan Richtár - Czech Export Bank

ředitel odboru finančního obchodu a exportu / Director of Export Finance Department

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ALEŠ ROD

VÝKONNÝ ŘEDITEL CETA /
EXECUTIVE DIRECTOR OF CETA





centrum
ekonomických a tržních
analýz

SOCIO-ECONOMIC IMPACTS ASSOCIATED WITH THE CONSTRUCTION OF NEW NUCLEAR UNITS

International Engineering Fair, Brno, Czech Republic
11 October 2023

Objectives of the study

– What is our goal?

- Identify key benefits as well as potential risks.
- We pay particular attention to specific risks that may not be obvious at first glance.
- Quantify the macro-economic benefits of the construction.
- Identify and quantify microeconomic benefits.
- Highlight areas that can be developed within the region hand in hand with the construction.

– Methodology

- Own questionnaire survey among entrepreneurs in the Třebíč region
- Debate roundtables with key stakeholders
- Input-Output analysis (quantifying multiplier effects)

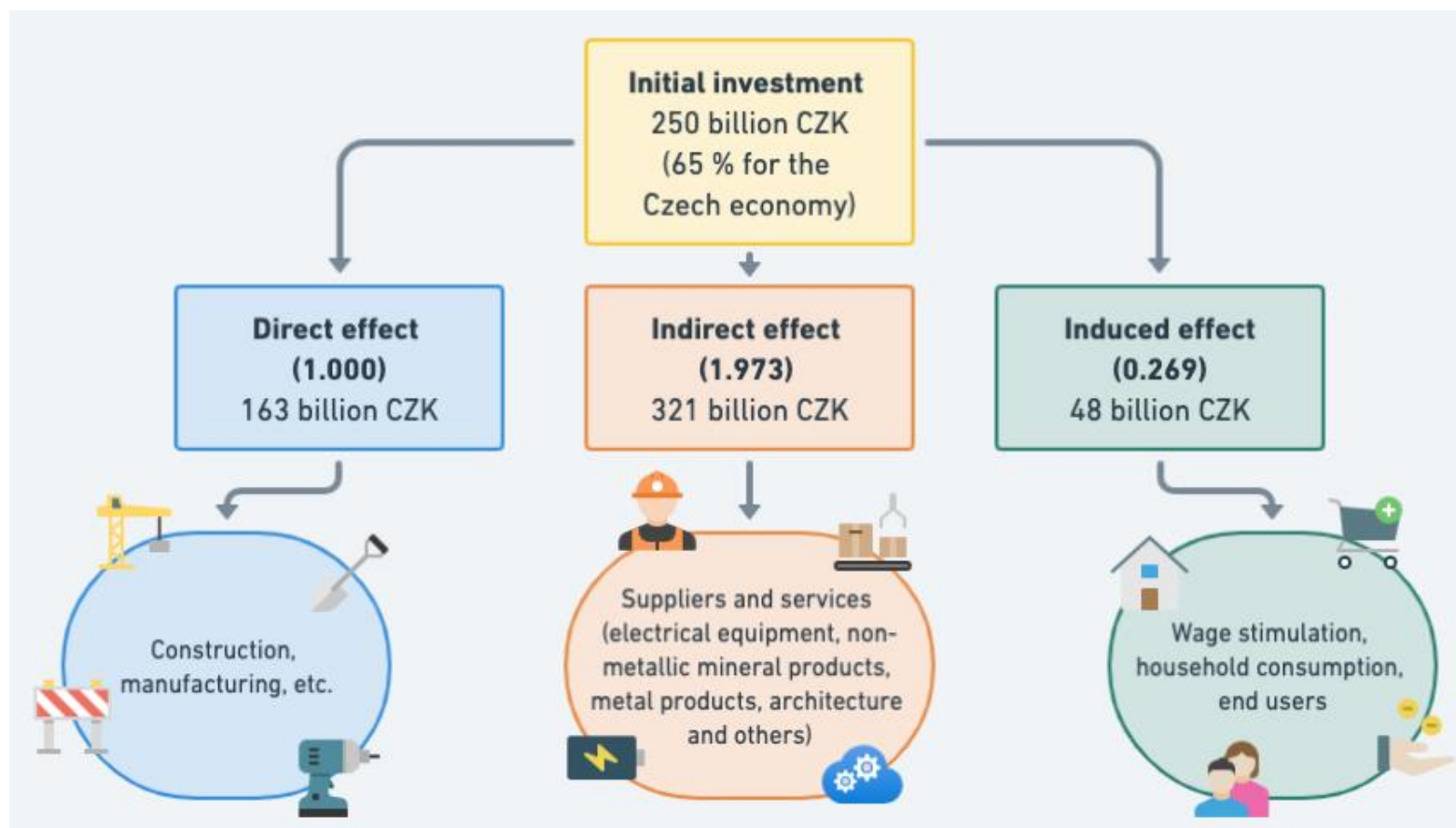
Macroeconomic impact of the investment (billion CZK)

	1 block	2 blocks	3 blocks	4 blocks
Investment (public estimate)	250 (10,2 billion EUR)	500 (20,5 billion EUR)	750 (30,7 billion EUR)	1.000 (41 billion EUR)
Of which for the Czech economy	65 %	65 %	65 %	65 %
Impact on GDP				
Direct	163	325	488	650
Indirect	321	641	962	1.282
Induced	48	96	144	192
SUM	532 (21,8 billion EUR)	1.062 (43,5 billion EUR)	1.594 (65,3 billion EUR)	2.124 (87,1 billion EUR)
Impact on government budget	183 (7,5 billion EUR)	365 (14,9 billion EUR)	548 (22,5 billion EUR)	731 (29,9 billion EUR)

Source: own calculations based on publicly available information and CZSO statistical data

- The value-added multiplier is equal to 3.269.
 - Direct effect = 1.000
 - Indirect effect = 1.973
 - Induced effect = 0.269
- 65% involvement of the Czech industry (CPIA).
- The impact on the public budget has been estimated using a composite tax rate for the Czech Republic of 34.4% (OECD, 2020).
- The overall impact on the Czech economy will depend on the number of new units built.

Value-added multiplier effect of the construction



Source: own calculations based on publicly available information and CZSO statistical data

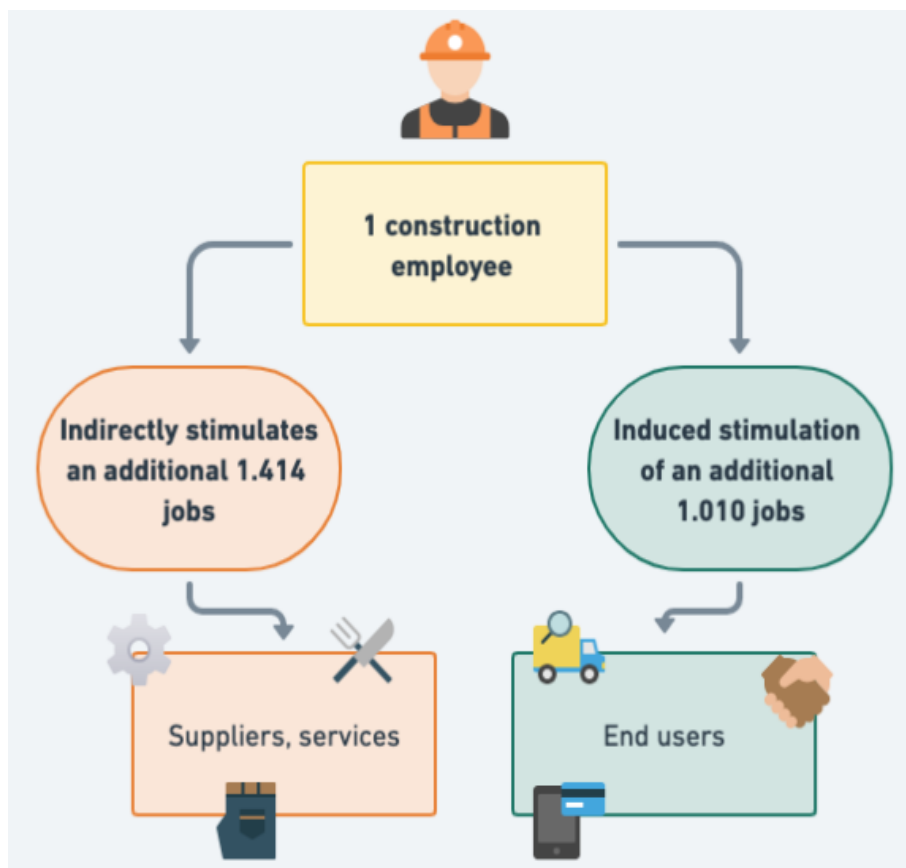
How many new jobs will the project create?

	1 block	2 blocks	3 blocks	4 blocks
Construction	up to 5.000	5.000–10.000	10.000–15.000	15.000–20.000
Operation	up to 1.000	1.000–2.000	2.000–3.000	až 4.000
<i>operation (20 %)</i>	200	200–400	400–600	600–800
<i>maitanance (30 %)</i>	300	300–600	600–900	900–1.200
<i>security (10 %)</i>	100	100–200	200–300	300–400
<i>indus safety (10 %)</i>	100	100–200	200–300	300–400
<i>support services (10 %)</i>	100	100–200	200–300	300–400
<i>ingeneering (5 %)</i>	50	50–100	100–150	150–200
<i>I&C (Instrumentation and control) (5 %)</i>	50	50–100	100–150	150–200
<i>excellence, chemistry, management (10 %)</i>	100	100–200	200–300	300–400

Source: own calculations based on publicly available information and EDF experience

- The operation of a power plant requires quite a wide range of different professions, from specialists to maintenance workers.
- More than half of the workforce provide day-to-day operations, security or maintenance.
- There are also those who provide operational safety, a range of support services, engineering, instrumentation or chemical processes.

Employment multiplier effect (construction works)



Source: own calculations based on publicly available information and CZSO statistical data

- The employment multiplier is equal to 3.4
 - Direct effect = 1.000
 - Indirect effect = 1.414
 - Induced effect = 1.010
- However, these figures do not imply that 2.4 new jobs would be created with the employment of each additional construction worker.
- Employment within firms in the connected sectors will be positively stimulated, which may cause them to reach their capacity limits, and therefore new hires will be needed in the downstream sectors as well.

Potential benefits associated with the construction

The Dukovany nuclear power plant is perceived not only as a major employer, but also as a key contribution to the state energy security, a basis for increasing the educational level of the population, economic stability and the overall standard of living in the region.

Therefore, the construction of the new units is associated with a number of economic benefits and opportunities:

- **Strengthening the Czech energy self-sufficiency.**

- Building an alternative source of energy is absolutely essential for maintaining the competitiveness of the Czech economy in the future (cost increases for lignite power plants, pressure on energy prices).

- **Strengthening transport as an opportunity to develop other infrastructure networks in the region.**

- Digital, water and wastewater infrastructure, services, healthcare (telemedicine).

- **Promoting education and stimulating human capital.**

- Growth of human capital in the form of an inflow of skilled workers, quality of education and necessary retraining.

What are the key identified risks and gaps?

- Pressure on wage demands from employees of companies in the region and rising price levels.
- Increased demand for real estate and reduced housing affordability in the region.
- Insufficient transparent communication with all stakeholders.
- Timely adjustment of transport infrastructure.
- Shortage of building materials.
- Length of permitting processes and administrative complexity.
- Shortage of skilled labour force.

Conclusions and recommendations

- It is crucial to ensure that positive effects do not only stimulate overall Czech national economy, but also stimulate the host region itself in an appropriate and long-term manner, e.g. through the comprehensive and coordinated development of all infrastructure networks and services.
- Shortage of both manually skilled workers and nuclear power professionals could negatively affect development of the whole segment and closely related industries in the future.
 - International context -> number of other European countries are also planning massive investments in nuclear energy (competitive pressures).
 - The readiness of the labour market and training capacities must go hand in hand with the timing of the construction works and subsequent start-up of the new units.

A long-term coordination and strategic approach across all levels of government and municipalities is needed to overcome key barriers identified.



Thank you!

Ing. Aleš Rod, Ph.D.
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CETA – Centre for Economic and Market Analysis
Jungmannova 26/15, Prague, Czech Republic





ROMAN ZDEBOR - EDF

ŘEDITEL POBOČKY /
BRANCH MANAGING DIRECTOR





EDF introduction

Roman Zdebor

EDF Nuclear Czechia – Managing Director

October 11th 2023

EDF | NEW NUCLEAR DEVELOPMENT



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→ EDF, A European utility and vendor committed to net-zero targets



EDF'S BUSINESS COVERS ALL ELECTRICITY-RELATED ACTIVITIES



Electricity generation



Transmission and distribution



Energy supply



Optimisation and trading



KEY FIGURES IN 2021

€143.5
bn

Sales

328,1
TWh

Electricity generated in France

2653
TWh

Nuclear Electricity generated Worldwide

90%

Carbon-Free Electricity

More ambitious goals in 2030 to reduce our CO₂ emissions

Direct emissions ↘ 50 % compared to 2017

Indirect emissions ↘ 28 % compared to 2019

Build a net zero energy future with electricity and innovative solutions and services, to help save the planet and drive well-being and economic development.

→ EDF, the largest nuclear operator in Europe and worldwide

→ EDF, the world's leading nuclear operator

56 reactors in operation

61,4 GWe

1 reactor in final commissioning



9 reactors in operation

5,9 GWe

2 reactors under construction

2 reactors under development



2 reactors in operation



67 reactors in operation in the world

+ 2,000 reactor-year of experience

+ 50,000 people working in the nuclear field

→ EDF manages the entire nuclear power plant lifecycle

➤ **DESIGN**

➤ **BUILD**

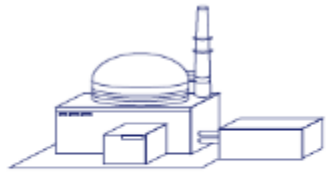
➤ **OPERATE**

➤ **DECOMMISSION**



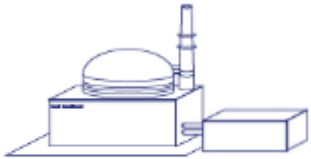
With 7 EPR projects across the world, EDF is fully engaged in nuclear new build activities and is committed to supporting several countries in their nuclear programme development.

Key success factors and How EDF can contribute: the “V”



EPR

1,650 MWe



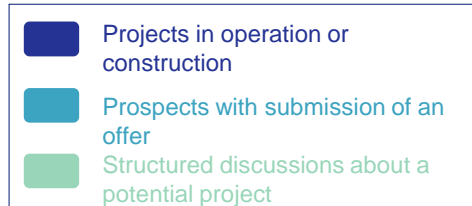
EPR1200

1,200 MWe



nuward

340 MWe



 **The Netherlands**
Potential of 2 EPR/EPR1200 and a NUWARD SMR program

 **United Kingdom**
2 EPR under **construction**
2 EPR under **development**
Potential NUWARD SMR program

 **France**
1 EPR under **commissioning** • 6 EPR under **development** + 8 EPR in option •
First of a kind SMR program with NUWARD SMR under **development**

 **Sweden**

Potential NUWARD SMR program

 **Finland**

1 EPR in **commercial operation**
Potential of 2 EPR/EPR1200 and a NUWARD SMR program

 **Poland**

Preliminary offer for up to 6 EPR and a potential NUWARD SMR program

 **Czech Republic**

Bid for 1 EPR1200
Potential of 3 EPR1200 and a NUWARD SMR program

 **Slovakia**

Potential of 1 EPR1200 and a NUWARD SMR program

 **Slovenia**

Potential EPR/EPR1200 program

A portfolio of mature products to meet European needs



Děkuji vám

Merci



DUŠAN RICHTÁR - CZECH EXPORT BANK

ŘEDITEL ODBORU FINANČNÍHO OBCHODU A EXPORTU /
DIRECTOR OF EXPORT FINANCE DEPARTMENT

CZECH EXPORT BANK

SUPPORT OF CZECH SUPPLIERS IN THE NUCLEAR ENERGY SECTOR

Dušan Richtár, Head of Export Finance Department

Czech Export Bank (CEB)

Specialised state-owned bank with international credit rating (S&P AA-)

- Strategy not limited by foreign parent bank
- Focusing on **large Czech exporters, producers of final products** and services and **Czech companies expanding abroad**
- **Transparent and credible partner** to commercial banks (clubs and syndicates)
- Experience (tailor-made solutions) + **expertise, speed and flexibility**
- Long term experience in **financing the energy sector – including nuclear**

With CEB you can

1. Finance **modernisation** and increase your **competitiveness**

- For Czech companies with over 25% of sales exported
- **Financing CAPEX** (e.g. new technologies and digitalisation)
- **Financing working capital**, including stocks, receivables or sub-deliveries
- **Financing acquisition** in the Czech Republic

2. Finance your **foreign customers (private or sovereign)**

- Delivery of larger units including accompanying services
- Components deliveries of (engineering) character
- **NEW – max. tenor for Buyer's Credits in nuclear energy sector = 22 years**

3. Finance your **expansion and investment abroad**

- Financing **acquisition, operations and growth abroad**
- Financed foreign entity must be Czech-owned or controlled
- Investment duration min. 3 years

Trade finance with CEB

1. All types of Bank Guarantees

- Bid bonds, Advance payment guarantees, Performance bonds, Retention bonds, Warranty guarantees
- **Flexible guarantee frameworks**
- **Tailor-made wording + individual approach and structure**
- Tenor up to 5 years

2. Letters of Credits

- **Export and import Letters of Credit** – advising, confirmation and issuance based on UCP600 international rules

3. Purchase of receivables

- **L/C receivables and export contract receivables**
- Flexible frameworks
- Tenor = 60 days to 5 years

Our foreign clients



ENERGO-PRO

Operates hydroelectric power stations in central and eastern Europe and Black sea region, including Alpaslan and Kakrakurt projects in Turkey.



JMO III (Mochovce) – Slovenske elektrarne

Construction of the third block of nuclear power plant in Mochovce (Slovakia) = 8 Buyer's Credits and Bank Guarantees.



KURGANSKAJA

Over ¼ billion EUR Buyer's Credit for construction of 220 MWh steam-gas power plant.

Contacts

PODPORUJEME ČESKÝ VÝVOZ,
INVESTICE A KONKURENCESCHOPNOST

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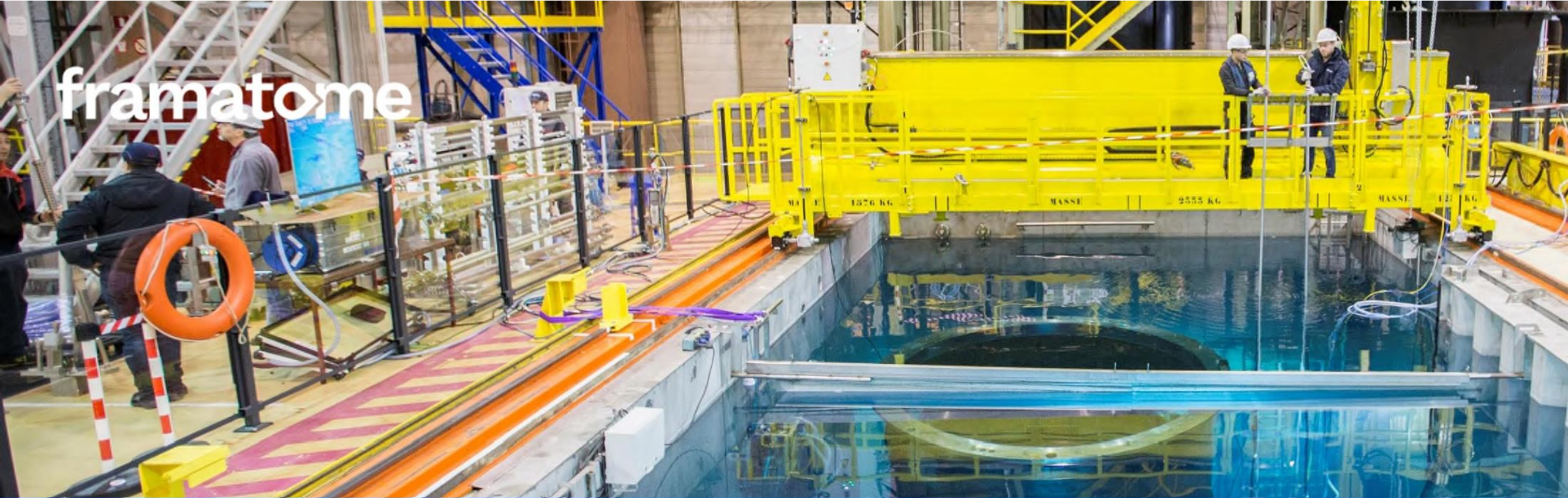
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DAUREN SERKEBAYEV - FRAMATOME

ODPOVĚDNÝ ZA NABÍDKU FRAMATOME VE VÝBĚROVÉM ŘÍZENÍ NA PROJEKT DUKOVANY 5 /
RESPONSIBLE FOR FRAMATOME'S OFFER IN THE DUKOVANY 5 TENDER



framatome

Framatome

NUCLEAR ENERGY AS AN OPPORTUNITY FOR REGIONAL DEVELOPMENT

Brno, 11/10/2023

5 minutes for safety

OUR GOLDEN RULES

ZERO ACCIDENT AMBITION

TOP KILLERS & VITAL RULES



I **NEVER** walk or stand under a suspended load.



I **ALWAYS** protect myself from falls from heights and I protect others from falling objects.



I **ALWAYS** maintain a safe distance from moving equipment.



I only work on equipment with all **energy sources locked out**.



I **ALWAYS** obtain a permit before entering a confined space.



I **NEVER** work or drive under the influence of alcohol or drugs.



I **NEVER** use a mobile phone while driving.



I **ALWAYS** wear my seatbelt and respect traffic rules, including speed limits.



I **ALWAYS** use the specified protective equipment when performing live electrical work.



I **ALWAYS** wear a lifejacket when working near water where there is no guardrail.

BEHAVIORAL RULES



First minutes dedicated to safety



Hold on to handrails



Reverse parking



Walking safety



Order and cleanliness

A doubt, a danger... STOP !

If a rule is not applicable, we have a duty to stop and alert.
Any deviation requires a formalised risk analysis and written authorisation from management.

Framatome

For over 60 years, Framatome's teams have been involved in developing safe, competitive, clean, low-carbon nuclear energy worldwide by:

- designing nuclear power plants,
- supplying nuclear steam supply systems,
- designing and manufacturing components and fuel assemblies,
- integrating automation systems,
- and servicing all types of nuclear reactors.

The original equipment manufacturer of:

92 nuclear power plants

€4.1 billion revenue in 2022

framatome



Worldwide presence

1 - France

- Chalon-sur-Saône
- Grenoble
- Jarrie
- Jeumont
- Le Creusot
- Lyon
- Maubeuge
- Montbard
- Marseille
- Montreuil-Juign
- Paimboeuf
- Paris
- Romans-sur-Isère
- Rugles
- Rungis
- Saint-Marcel
- Saint-Paul-lez-Durance
- Sully-sur-Loire
- Ugine

2 - Germany

- Erlangen
- Karlstein
- Lingen

3 - USA

- Benecia
- Charlotte
- Christiansburg
- Cranberry Township
- Jacksonville
- Houston
- Lynchburg
- Richland
- Mansfield

4- China

- Beijing
- Lianyungang
- Shenzhen
- Shanghai
- Taishan
- Deyang
- Haiyan
- Daya Bay

Rest of the world

- 5 Finland: Olkiluoto
- 6 Japan: Tokyo
- 7 South Korea: Seoul, Daejeon
- 8 Russia: Moscow
- 9 Ukraine: Kiev
- 10 Bulgaria: Sofia, Kozloduy
- 11 Slovakia: Bratislava
- 12 Hungary: Budapest, Paks
- 13 Czech Republic: Prague, Dukovany
- 14 Sweden: Helsingborg
- 15 Spain: Zaragoza, Tarragona, Madrid
- 16 United Kingdom: Bristol
- 17 South Africa: Cape Town
- 18 Argentina
- 19 Brazil: Rio de Janeiro, Angra dos Reis
- 20 Canada: Pickering, Kincardine, Montreal, Cransfield



16,000
employees

+60
sites*

20
countries

* Locations have multiple sites

Localization Strategy for Dukovany Project

- Framatome is a supplier of Nuclear Steam Supply Systems, Safety I&C and Nuclear Instrumentation
- European actor with European partners for the delivery of Projects in Europe
- Scope localized in Czech Republic
 - Components manufacturing including reactor pressure vessel internals, pressurizer and other mechanical components
 - Tests and commissioning Safety I&C
 - Installation activities on the construction site
- Qualification requirements for the Supply Chain
 - Expertise in nuclear-grade new build project
 - Expertise in nuclear specific Codes & Standards
 - Strong Supplier commitment

CONTACTS FOR BUSINESS OPPORTUNITIES

Office in Czechia

Michal KACENA – Framatome Representative in Czech Republic – michal.kacena@framatome.com

Dukovany New Build Project

Dauren SERKEBAYEV – Offer Manager for Dukovany 5 NSSS* – dauren.serkebayev@framatome.com

Mechanical Components

Jérôme MARROCCO-PLUCHE – Purchasing Manager – jérôme.marrocco-pluche@framatome.com

I&C

Valéry LEFEVRE – Purchasing Director – valery.lefevre@framatome.com

Installation

Samir ASGASSOU – Purchasing Manager – samir.asgassou@framatome.com



MICHELE DELEVOYE - GE

OBCHODNÍ ŘEDITELKA /
SENIOR COMMERCIAL MANAGER



Integrated offering YOUR LIFECYCLE PARTNER



GE's Steam Power technology is operating in ...

50 % of the world's nuclear power plants

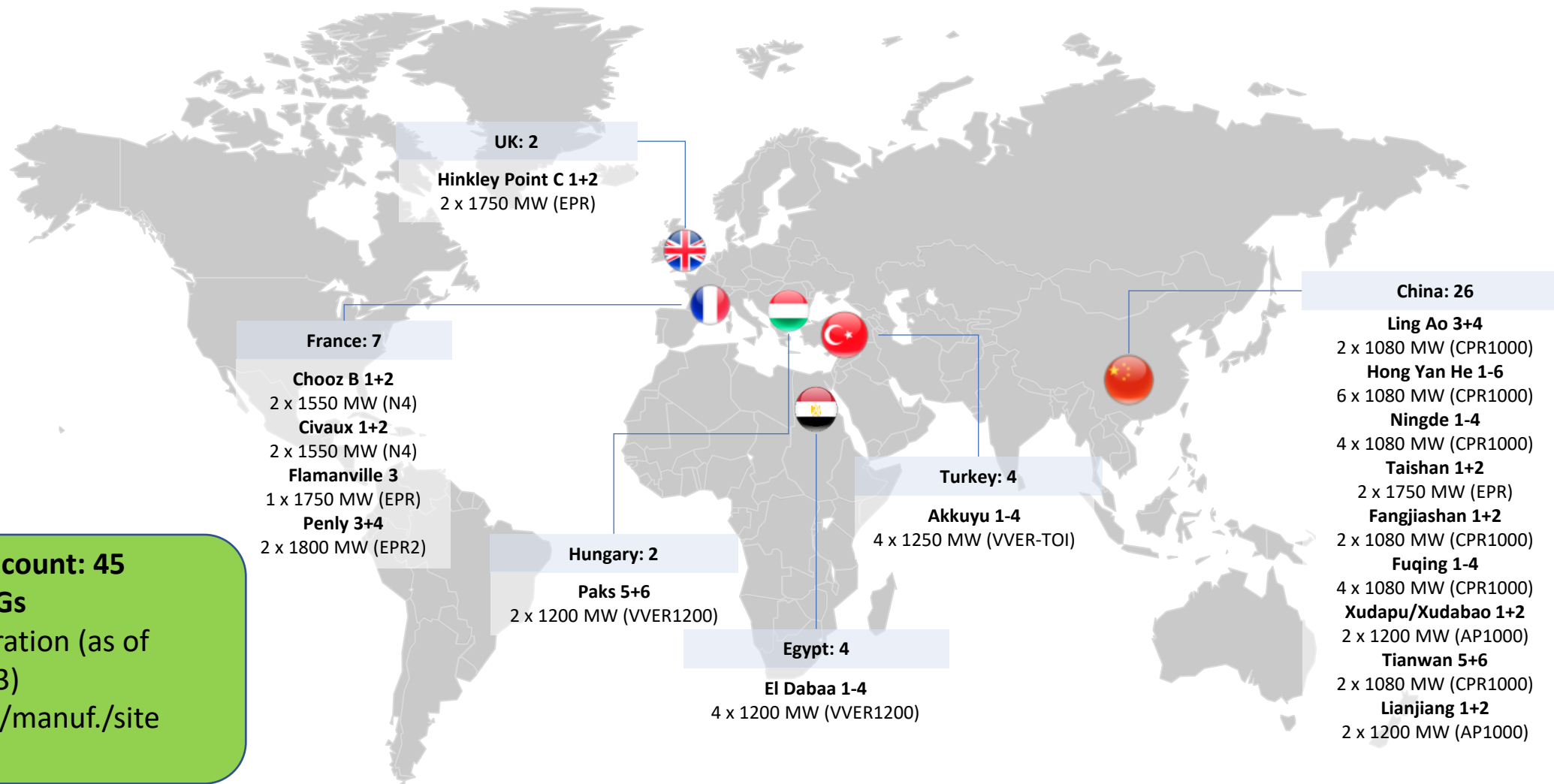
We provide leading technology for nuclear turbine islands from Equipment supply to Complete EPC INTEGRATED applications, Warranty, Lifetime Maintenance and Life extension services

We regularly service ~200 units and execute more than 130 multi-year agreements (MYAs) with operators worldwide

GE's Steam Power Nuclear Business is :
- A team of ~ 3,400 employees across 16 countries

Arabelle Nuclear STG References

>20 years of Arabelle technology deployment worldwide on various reactor types



Total world count: 45

Arabelle STGs

- 26 in operation (as of Sept. 2023)
- 19 in eng./manuf./site erection

> 55 GW of Arabelle power worldwide

SUPPLIER QUALIFICATION PAVING THE WAY TO OTHER MARKETS

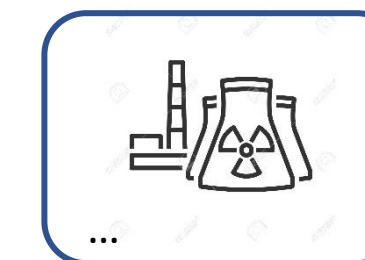
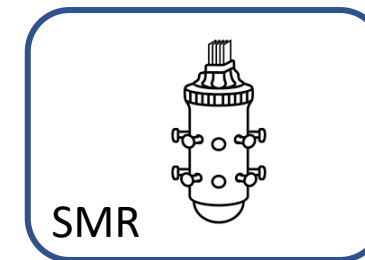
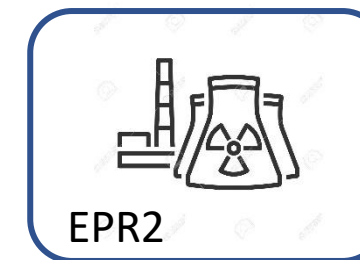
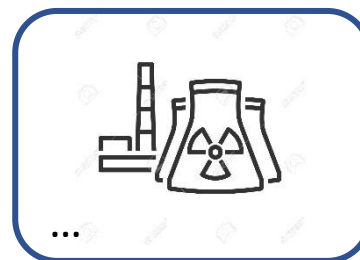
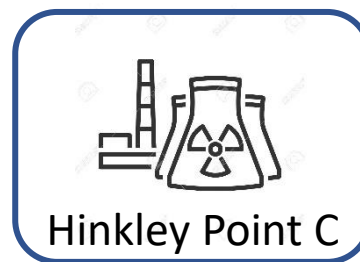
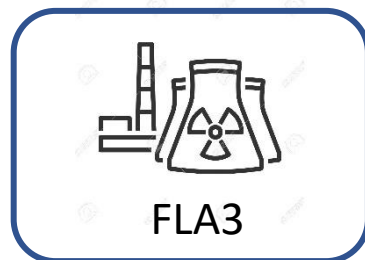
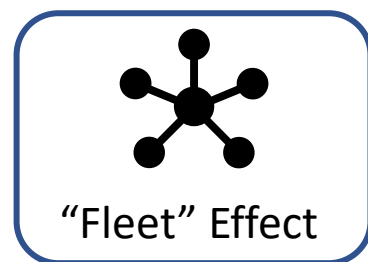


ISO 19443 - Nuclear Safety Pillar : Supply Chain Control



NOW, we are
EXECUTING...

THEN we can SUPPLY ...
thanks to a SUSTAINABLE
supply chain



AREAS OF POTENTIAL LOCAL ENGAGEMENT & JOB CREATION

TO DATE : 13 CZECH Suppliers' Companies have been visited

Two additional Memorandums of Cooperation for HX Scope signed in June 2023

Several Supplier development plans already under discussion

Networking events across Y2022 & Y2023



Potential for localization :



Heat Exchanger, Condenser (including LP heaters), MSR, HP & LP heaters and Feedwater tank.



Balance of Conventional Island,

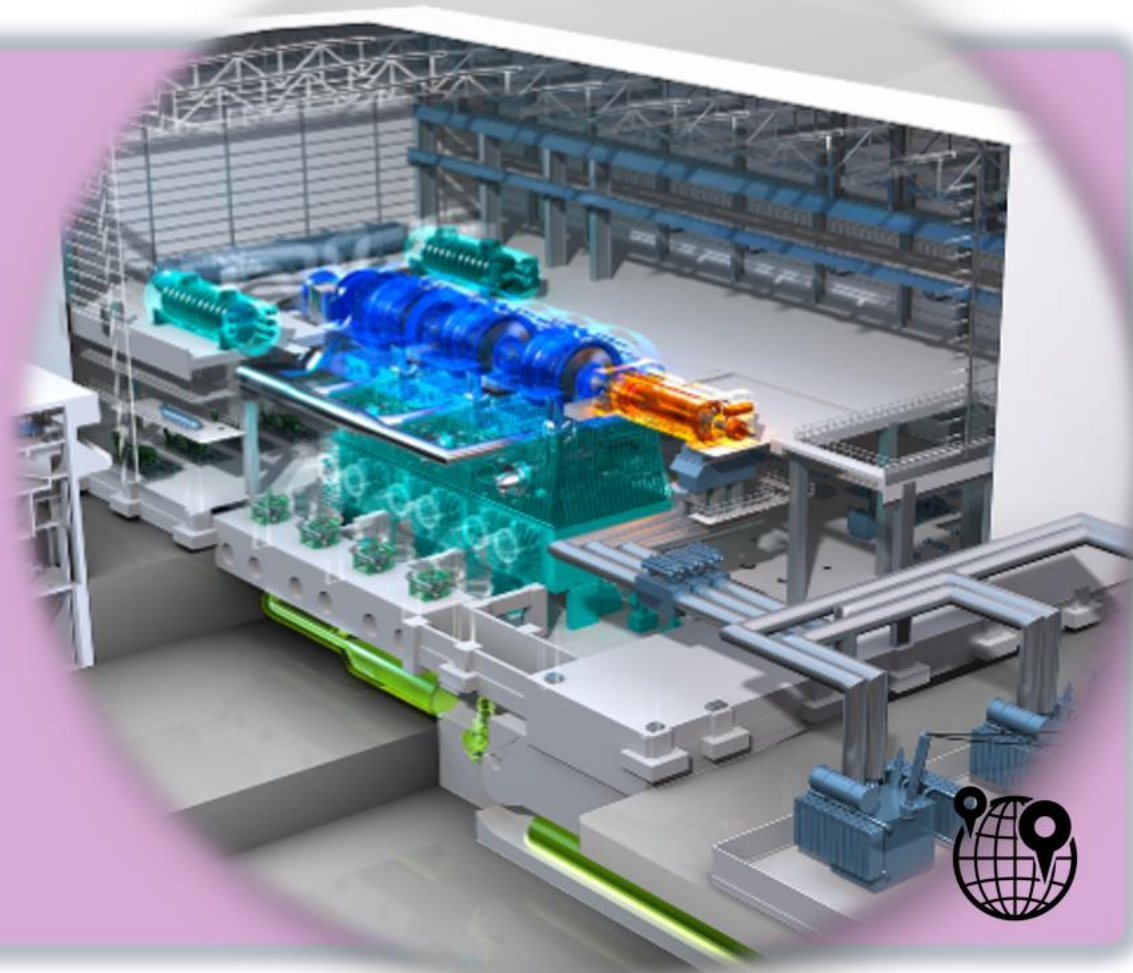
Generator connections, dosing system, polishing plant, fire extinguishing, gland system, valves, miscellaneous pumps, tank, piping and junction boxes



Site Erection & Services, Mechanical erection, piping erection, electrical and I&C works and secondary steel structure **BUT NOT ONLY... site management skills will also be needed, i.e. : Schedule manager, EHS manager, Quality manager, Nuclear Safety , Document management specialist , (...).**

Lessons learnt from FLA3 / HPC : Comprehensive project management teams within local suppliers is crucial to the success of the project.

LET'S —
POWER
— ON



Localization Potential – EXAMPLE Hinkley Point C

Mechanical

- **81 product packages:**
 - From basic products: valves, pipes, tanks, ...
 - To complex incorporated packages: Air compressor, miscellaneous pumps, chemical treatment, fire-fighting, skid, ...
- **Piping works:** 3 000 tons per unit.

Exchangers

- **5 product packages:**
 - Condenser – 1200 tons Steelwork,
 - Vertical or Horizontal MSR
 - Low Pressure Heaters
 - High Pressure Heaters
 - Deaerator Storage Tank

Electrical

- **18 product packages:**
 - From Low Voltage: instrumentation cabling, cabinets, ...
 - To High Power: Generator connections & IPB, ...
- **Electrical works:** 665 Km cables, cables trays, cabinets, boxes, earthing connection, ...

Erection

- **4 Erection packages:**
 - Heat exchangers, pumps, ...
 - Fire-fighting, Heat & Ventilation, ...
 - Piping, valves, instrumentation, ...
 - All equipment except shaft line and related auxiliaries.

Master Document :
HPC Local Business
Development Plan

Olympic gold medal won by Czech gymnast Bedřich Šupčík for rope climbing at the 1924 Summer Olympics in Paris on display in the National Museum (Národní muzeum) in Prague, Czech Republic



This medal was designed by French medal engraver André Rivaud



WHEN WE **WORK TOGETHER**, WE **THRIVE** AND **FLOURISH** TOGETHER





JOSEF PERLÍK - SIGMA/CPIA

PŘEDSEDA PŘEDSTAVENSTVA /
CHAIRMAN OF THE BOARD OF DIRECTORS

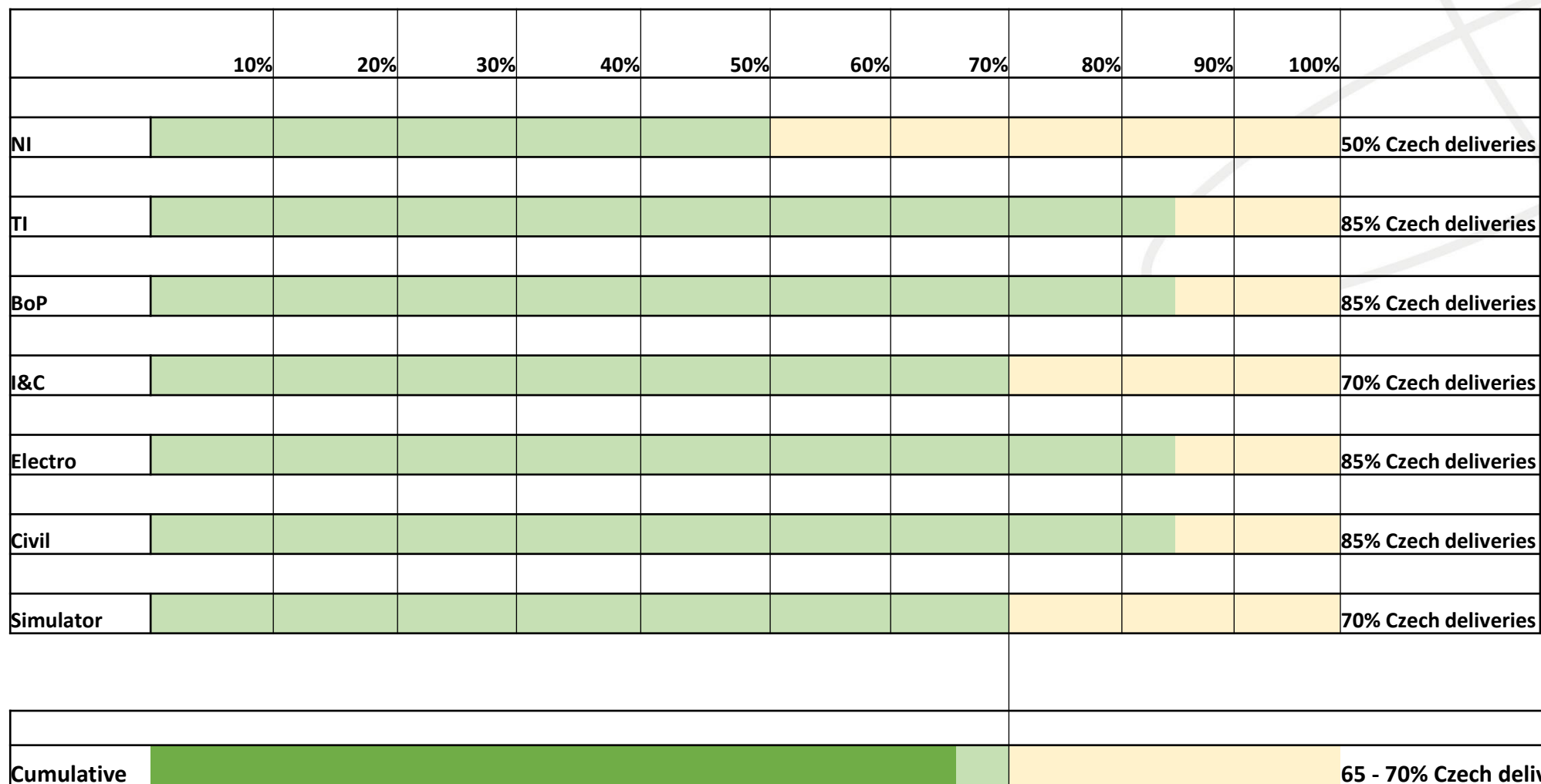


Economical Benefits from New NPP Units to be constructed in Czech Republic



ALLIANCE OF CZECH SUPPLIERS
FOR NUCLEAR POWER PLANTS

Czech Industry Capabilities



Potential economical benefits for the Czech Republic – 4 units and 65% of industry

Total project price	800 billion CZK
Czech Industry Participation	65 % → 520 billion CZK
Impact on Gross Domestic Product (interval)	260 – 936 billion CZK
Impact on public budgets income (interval)	107 – 384 billion CZK
Impact on public budgets outcome (interval)	110 – 396 billion CZK

Potential economical benefits for the Czech Republic – 4 units and 65% of industry

- Yearly in personal income taxes more than **1,5 billion CZK more than up to now** and in social a health insurance more than **6 billion CZK yearly more than up to now**
- **Maintenance opportunities during the new units operation life time cycle in amount of 120 billion CZK**
- **Tens of billions CZK yearly income** related with the following export activities performed by the industry

Potential strategy benefits for the Czech Republic – 4 units and 65% of industry

- To secure one of the most important industry brand we have in our country
- New units maintenance independency during the operation and independency when developing the related technology infrastructure
- Maintenance costs decreasing during the operation
- Overall education support – the future for the future generation





ANTHONY DE BUSSCHERE - VCES

**ZÁSTUPCE GENERÁLNÍHO ŘEDITELE A TECHNICKÝ ŘEDITEL, MÍSTOPŘEDSEDA PŘEDSTAVENSTVA / DEPUTY CHIEF
EXECUTIVE OFFICER AND TECHNICAL DIRECTOR; VICE-CHAIRMAN OF THE BOARD OF DIRECTORS**



BUILDING A NUCLEAR POWER PLANT: AN OPPORTUNITY FOR THE ECONOMY OF THE REGION

VCES

Anthony DE BUSSCHERE
Deputy CEO - VCES
A BOUYGUES CONSTRUCTION COMPANY

BOUYGUES
TRAVAUX PUBLICS

EDF | NEW NUCLEAR DEVELOPMENT

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SCOPE OF WORKS FOR THE CIVIL CONSTRUCTION

THE FIRST ON SITE!!



Full **management of the civil construction project**, execution drawing if any, **construction methods, 3D BIM** management for the civil contractors

Site Preparation, Roads and access to the sites and inside, **Earthworks and deep foundations** if any, Drainages/ pumping and water treatments, **waterproofing works** and structures

Building and support facilities in EPC model

Lifting equipment, concrete and pumping **installations**, facilities for precast structures and areas for equipment

Concrete structure, steel structures, embedded plates,...

Reactor **containment liner, liners for the pools**

Secondary works, architectural works, doors, secondary steel structures, painting, coating,...

SUBCONTRACTS MAIN PACKAGES



Pools



Liners



Heavy lift



Steelwork



Paint



Concrete



Reinforcement

LOCAL SUPPLY CHAIN WITH BOUYGUES TP FOR NUCLEAR

Support
LOCAL
Businesses



- › The strategy of the Bouygues TP:
to maximize the local supply chain on site.



- › For nuclear construction (EPR):
minimum **65% of the civil works can be done using local resources** in our scope of works for NI and CI and BOP.



- › Local **Employees**: workers , engineers, technicians, foremen, apprentices, drivers, M&E, ...



- › Local **companies for civil works**



- › Local **companies for other works**



- › Local supply chain **for materials and site equipment**



- › **Indirect** local supplies

EXAMPLE OF HINKLEY POINT (UK) – BYLOR JV



OVER **4 000** WORKFORCE



BYLOR HAVE RECRUITED
MANY APPRENTICES

EMPLOYMENT BYLOR STAFF

Number of staff
>1 400

ORIGIN OF STAFF



Most recruited trades are Steel Fixers,
Carpenters, Crane teams, Paint applicators

EMPLOYMENT BYLOR WORKFORCE

Number of Workforce
>4 000

ORIGIN OF WORKFORCE



Most recruited trades are Steel Fixers,
Carpenters, Crane teams, Paint applicators

EXAMPLE OF HINKLEY POINT (UK) – BYLOR JV



Procurement commitment >£1,400M

Subcontract
>£1 000M

Supply
>400M



21
Countries



87%
UK



190
Subcontracts



922
Vendors



17 000
Orders



KULATÝ STŮL Č. 1 Maximalizace přínosů jaderného průmyslu pro region a ekonomiku / **ROUNDTABLE NR 1** Maximising benefits from nuclear industry for region and economy

Aleš Rod

výkonný ředitel společnosti CETA / Executive director of CETA

Roman Zdebor - EDF

ředitel pobočky / Branch Managing Director

Dušan Richtár - Czech Export Bank

ředitel odboru finančního obchodu a exportu / Director of Export Finance Department

Dauren Serkebayev - Framatome

odpovědný za nabídku Framatome ve výběrovém řízení na projekt Dukovany 5 / Responsible for Framatome's offer in the Dukovany 5 tender

Michele Delevoye - GE

obchodní ředitelka / Senior Commercial Manager

Josef Perlík - Sigma/CPIA

předseda představenstva / Chairman of the Board of Directors

Anthony De Busschere - VCES - Groupe Bouygues

zástupce generálního ředitele a technický ředitel, místopředseda představenstva / Deputy Chief Executive Officer and Technical Director; Vice-Chairman of the Board of Directors



PŘESTÁVKA / COFFEE BREAK



KULATÝ STŮL Č. 2 Udržitelná pracovní síla pro český a evropský jaderný program / **ROUNDTABLE NR 2** Sustainable labour force for Czech and European nuclear programme

Andrew Cockroft

senior manažer pro externí vztahy ze společnosti Hinkley Point C / Senior Manager - Stakeholder Relations from Hinkley Point C

Sarah Illouz - EDF

vedoucí nabídky EDF Dukovany 5 / Head of EDF's Dukovany 5 offer

Peter Szenasy - EPDOR

zakladatel a generální ředitel / Founder and Managing Director

Lukáš Zedník - Metrostav DIZ

zástupce ředitele; ředitel nabídky Dukovany 5 / Deputy Director; Director of EDF's Dukovany 5 offer

Aleš Dokulil - Nuvia

obchodní ředitel / Commercial Director

František Kural - ZAT

marketingový a obchodní ředitel / Marketing and Commercial Director





ANDREW COCKROFT

SENIOR MANAŽER PRO EXTERNÍ VZTAHY ZE SPOLEČNOSTI HINKLEY POINT C /
SENIOR MANAGER - STAKEHOLDER RELATIONS FROM HINKLEY POINT C





Hinkley Point C

Education and Training

Andrew Cockcroft
Senior Stakeholder Relations Manager



HPC Education Programmes – A Pipeline of Opportunity

Bridging the gap between education
and work



HPC Inspire
Ages: 11-16

HPC Inspire is our education programme for schools. Explore how subjects like science are relevant to the real world and open the door to a rewarding career, like engineering.



Young HPC
Ages: 16-21

Young HPC is our skills and development programme for 16-21 year olds. It's a chance for you to get a foot in the door at HPC. Meet employers at exclusive events. And make yourself the best candidate possible.



HPC Jobs Service
Age: 18+

Register with the HPC Jobs Service to be the first to hear about jobs you're interested in. To talk to us about what you might be good at. And to identify the skills you need to follow a career you're interested in.

Hinkley Point C's Educational Programmes



Launched in 2010

- Aimed at those aged 16 & below
- Workshops, Mock Interviews, Careers Fairs
- Digital resources inc. Virtual Work Experience Programme
- Support over 40 schools across the South West



30
Events in
2022



Launched in 2016

- For those aged 16 – 21
- Fast track programme: exclusive events, careers workshops & fairs, curriculum insight talks
- Support 25 schools and colleges across the South West.



73
Events in
2022

2023 So far.....Education Outreach



3x Inspire workshops delivered by Stem Works
and our **Virtual Work Experience Programme** which will launch in October 2023



25x other events for those aged 14-16
Including: SomerScience & Cheltenham Science Fest



49x YHPC age range targeted events
Including: Yeovil College Construction Expo & Weston College Careers Fair



77x events in total since January 2023
Including: 70x face to face events and 7x virtual events



28x different event locations have been covered
including: 10x Schools, 10x Colleges and 3x Universities
(others are mixture of virtual and events with multiple locations not related to educational settings)



Over 20,000 young people engaged
with the Education Outreach Team since 2021



30x Young HPC posts created for social media
Including Pathway cut downs, 'Day in the Life' style videos and targeted apprenticeship ads



Further Training and Skills Development

- Hinkley Point C **proves that the transition to net-zero can also deliver huge social and economic benefits**, changing lives and communities for the better.
- **New training centres will offer 30,000 places** as we reach peak construction. The project will help them to upgrade their skills to get better jobs, better pay which in turns supports regional productivity.



Skills investment

£24 million invested directly into Education, Skills and Employment



Training

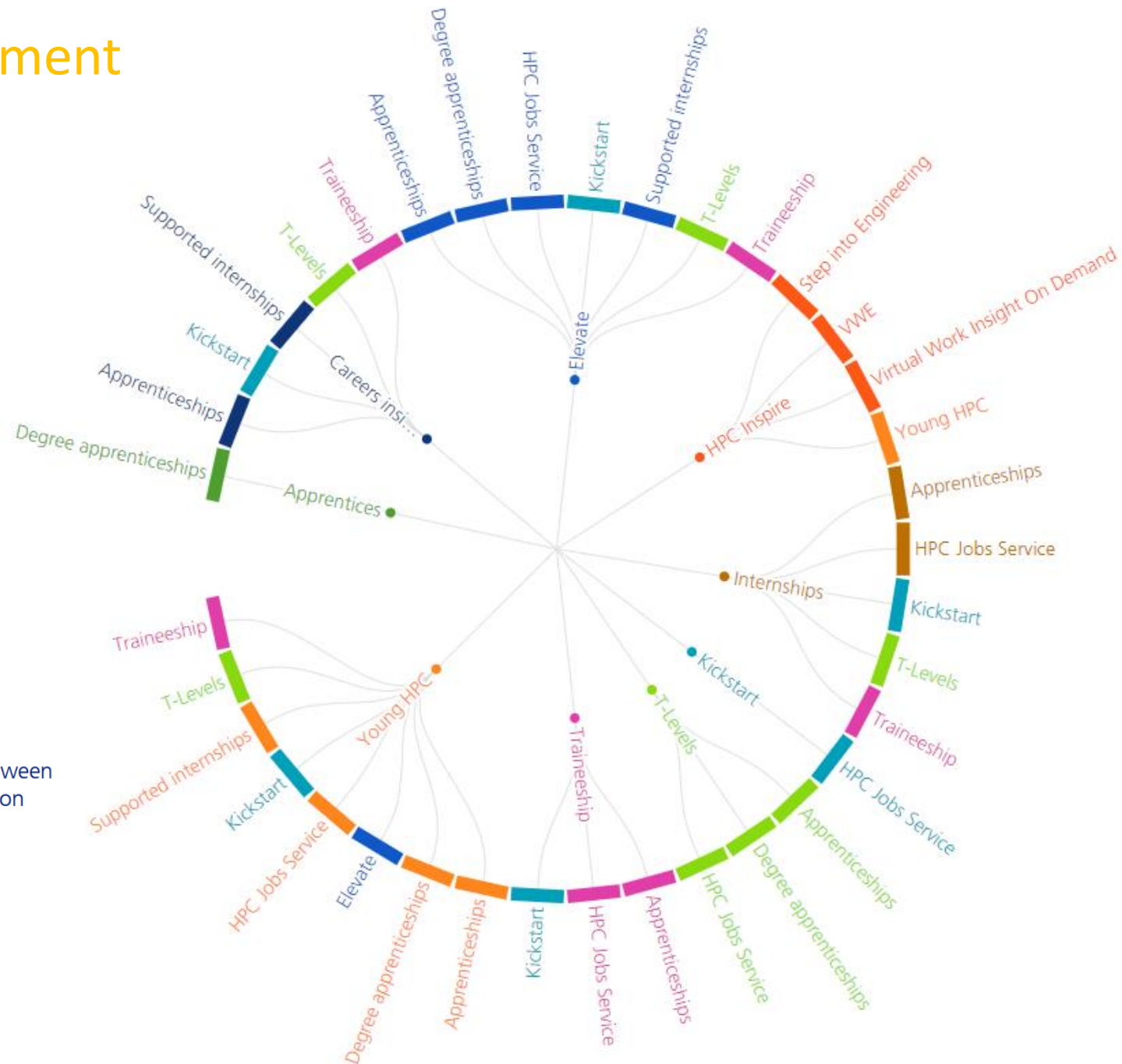
30,000 training places available between now and Hinkley Point C's completion



Apprentices

1,131 apprentices have been trained at Hinkley Point C so far

Original target: 1,000





Supporting Skills for Net-zero



Welding Centre of Excellence

Trainees are learning the specialised techniques required for nuclear projects. Since opening in 2020, more than 500 welders have been trained and tested, ensuring they have reached Hinkley Point C's competency standards. The Centre also provides routes for those seeking employment in welding, through the government's bootcamp training scheme.



Electrical Centre of Excellence

The facility, based at the Somerset Energy Innovation Centre in Bridgwater, provides training to support the electrical fit-out of Hinkley Point C. It also hosts candidates from the Hinkley Support Operative programme, which works to up-skill local people seeking employment and looking to begin new careers in construction.



Mechanical Centre of Excellence

Due to open later in 2022 and located next to the Construction Skills and Innovation Centre in Bridgwater, the facility will feature simulations of the Hinkley Point C site. Students will be trained and tested in mechanical installation techniques including pipefitting, steel erection and plating, ensuring they meet the high standards required for nuclear projects.

Diverse Training Routes

Hinkley support operative programme

Industrial placements

Reactor operator programme

Centres of Excellence

Occupational traineeships

Apprenticeships

Young HPC

Hinkley jobs service

Work experience

T-levels

Graduate programmes

Supported traineeships



SARAH ILLOUZ - EDF

VEDOUCÍ NABÍDKY EDF DUKOVANY 5 /
HEAD OF EDF'S DUKOVANY 5 OFFER



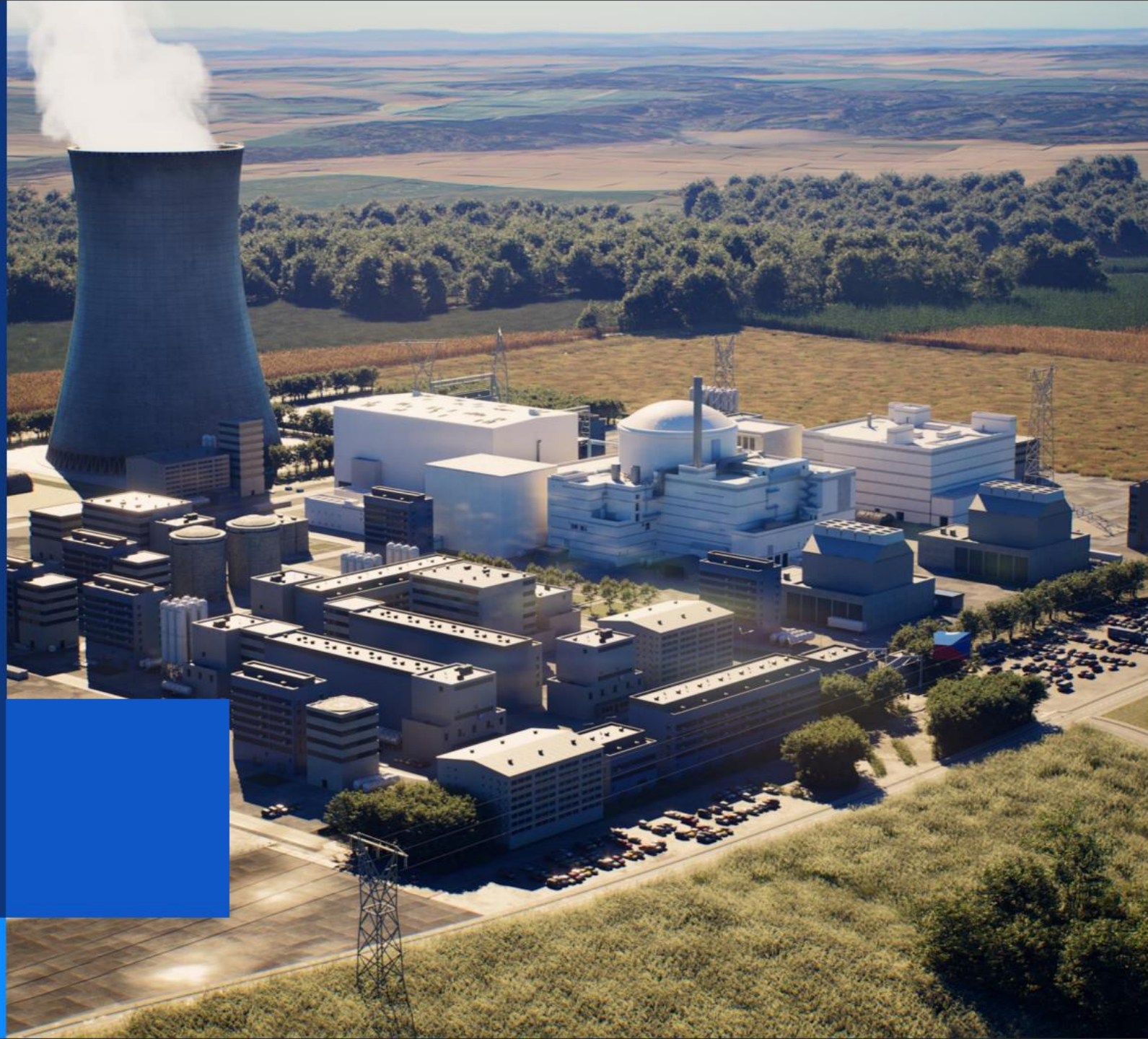
ROUNDTABLE 2

Sustainable labour force for Czech and European nuclear programme

Sarah ILLOUZ

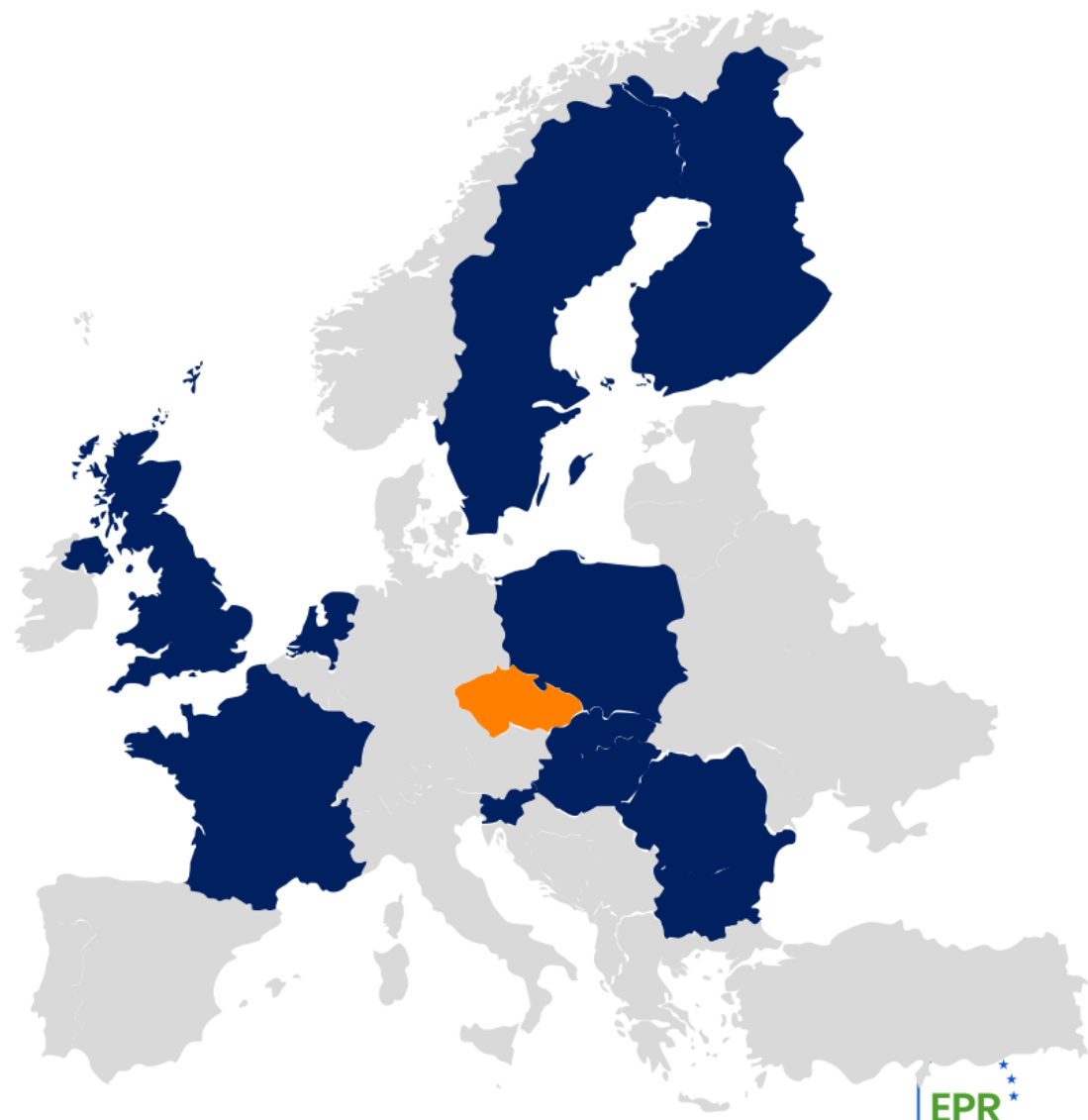
EDF Offer Director for Dukovany 5

11.10.23 Brno



The Nuclear Renaissance in Europe and in the Czech Republic will come with a growing need of skilled resources by 2040

- EDF is already engaged in **strengthening its resources** to support its domestic programme and its pipeline of projects, especially in Europe with the **Dukovany 5 Project**
- **EDF and its partners (Framatome, GE, Bouygues Travaux publics)** are preparing the future with **numerous initiatives to increase their capabilities** at the EU level
- Supporting **Human Capacity Building** and **Localisation** is in our DNA !
- But it comes with **significant investment** on the side both of the vendor and the partner country
- No labour force can be adequately secured without **anticipation** and **forward-looking strategy**



A full scope approach to EPR1200 localisation for Dukovany 5 and beyond based on proven experience

- Localisation and skills development based on **practical experience** in various countries and more recently in the UK (**HPC EPR Project**)
- Sustainable and targeted **localisation programme** for a high level of local content on all levels of the value chain, supporting labor force development
- Advanced and proven **human capacity building** approach involving staff training, and supplier qualification
- Promotion of **long-term French-Czech cross industry partnerships** and **not** just a “subcontracting” approach
- Promoting social engagement and transparent **stakeholder management** practices through the Czech nuclear industry organisations and clusters

Building bridges between Czech and French Industries



**+ 40
years**

forging a localisation methodology that guarantees economic and industrial benefits for local communities

EDF's multi-level localisation strategy will be implemented for DUKOVANY 5 with in mind the future Czech nuclear fleet as well as in Temelín 3 & 4 and for Dukovany 6

Unlocking Maximal Value and long-term engagement with Czech Industry



Relying on the experienced Czech nuclear industry

- Promotion of partnerships between Czech companies and experienced EDF suppliers, each company bringing its knowledge and experience to the partnership:
 - ❑ Czech regulation and working conditions by the Czech companies,
 - ❑ EPR specificities and EDF working process by EDF suppliers



Czech companies already successful partners in EPR projects



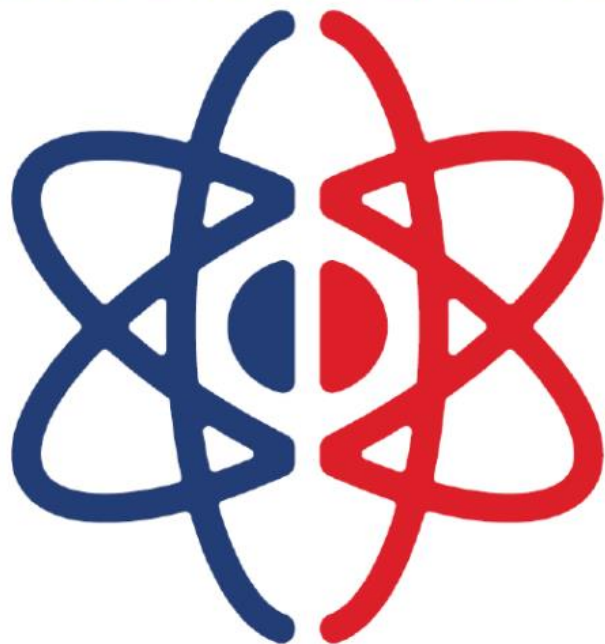
Implementation of robust localisation plans for all our projects

- Networking and creating opportunities : Suppliers Day
- Converging on shared values and commitments : Partners Day
- Human capacity building and training : Supplier Academy
- Fostering synergies of cooperation between Czech Industry and EDF partners
- Preparing the suppliers for success : company assessment, RFQ exercises, technical specifications



A Czech-French Nuclear Academy to secure the right skills at the right time

- The initiative will facilitate cooperation between both our countries providing a **comprehensive educational platform** at the level of universities, secondary schools and research institutions
- It will also focus on **vocational training and qualification**, with the already existing process of Supply chain qualification process
- Many actions are underway with **Czech universities** and **Suppliers' Academies**.



Česko-francouzská
jaderná akademie 



Nová energie pro Česko

www.edfprocesko.cz [X.com/EDFproCesko](https://x.com/EDFproCesko)



PETER SZENASY - EPDOR

ZAKLADATEL A GENERÁLNÍ ŘEDITEL /
FOUNDER AND MANAGING DIRECTOR

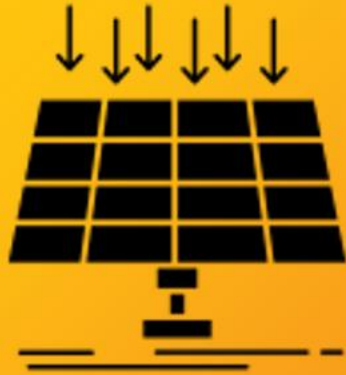




Sustainable labor force for Czech and European nuclear programme

October 11th,
2023





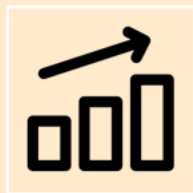
Addressing the task of establishing a sustainable workforce for the Czech and European nuclear program is highly intricate.

- Nuclear energy is notably more complex than renewable (solar and wind) energy.
- The forthcoming nuclear projects are poised to exert significant pressure on available resources.
- Challenges in the Czech market are already being grappled with.

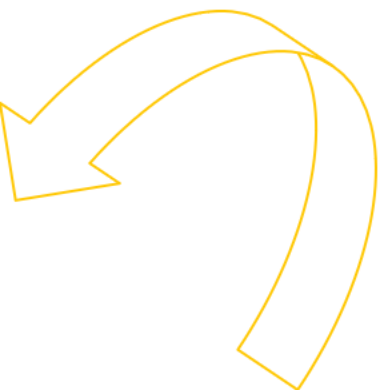
② Main issues



European language barrier and norms



Constantly evolving digitalization and artificial intelligence



③ Proposed solution

- **A prominent concern** is the language barrier, highlighting the importance of discussing the standardization of norms to make English a primary working language.
- **Standardizing norms and establishing projects in English** would effectively remove language obstacles and enable seamless collaboration among nuclear experts on European projects.
- **Recognizing the pivotal role of digitalization and artificial intelligence** in tackling labor capacity challenges.



Way forward

- Increased investments in engineering qualifications across all generations and expertise.**
- Addressing this issue involves fostering the transition of employees from other industries and establishing a robust pipeline of new engineers from universities.**

Final words

Past successes in the nuclear sector in the Czech Republic give us confidence in our ability to overcome future challenges.



Peter Szenasy
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+420 602 274 312
www.epdor.com





LUKÁŠ ZEDNÍK - METROSTAV DIZ

ZÁSTUPCE ŘEDITELE; ŘEDITEL NABÍDKY DUKOVANY 5 /
DEPUTY DIRECTOR; DIRECTOR OF EDF'S DUKOVANY 5 OFFER

**Sustainable Business Forum: Czech –
French nuclear energy forum**

**Metrostav
Group**

metr©stav

Metrostav DIZ s.r.o.

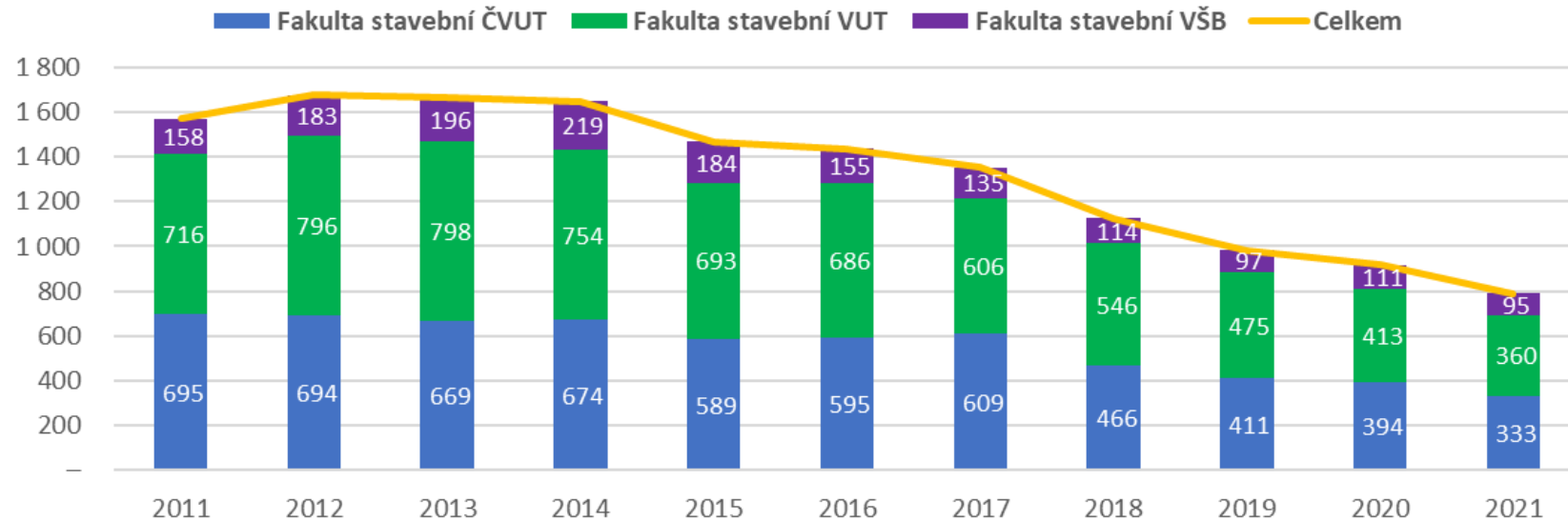
TBG metr©stav

**ZAKLÁDÁNÍ
STAVEB**

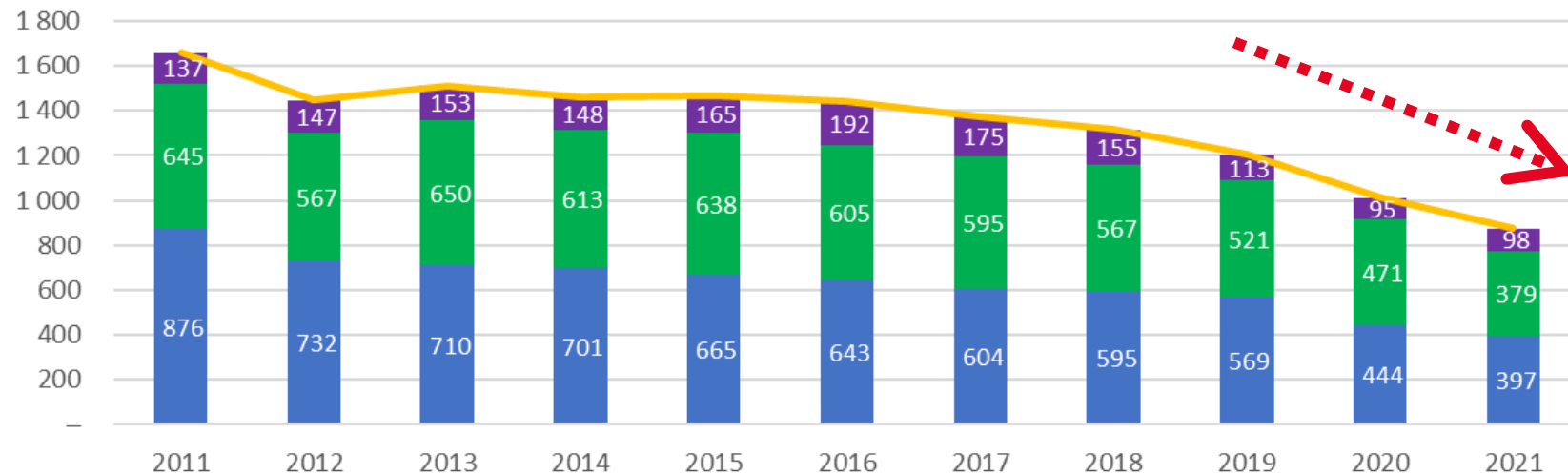


Graduates of civil engineering faculties of universities of the Czech Republic

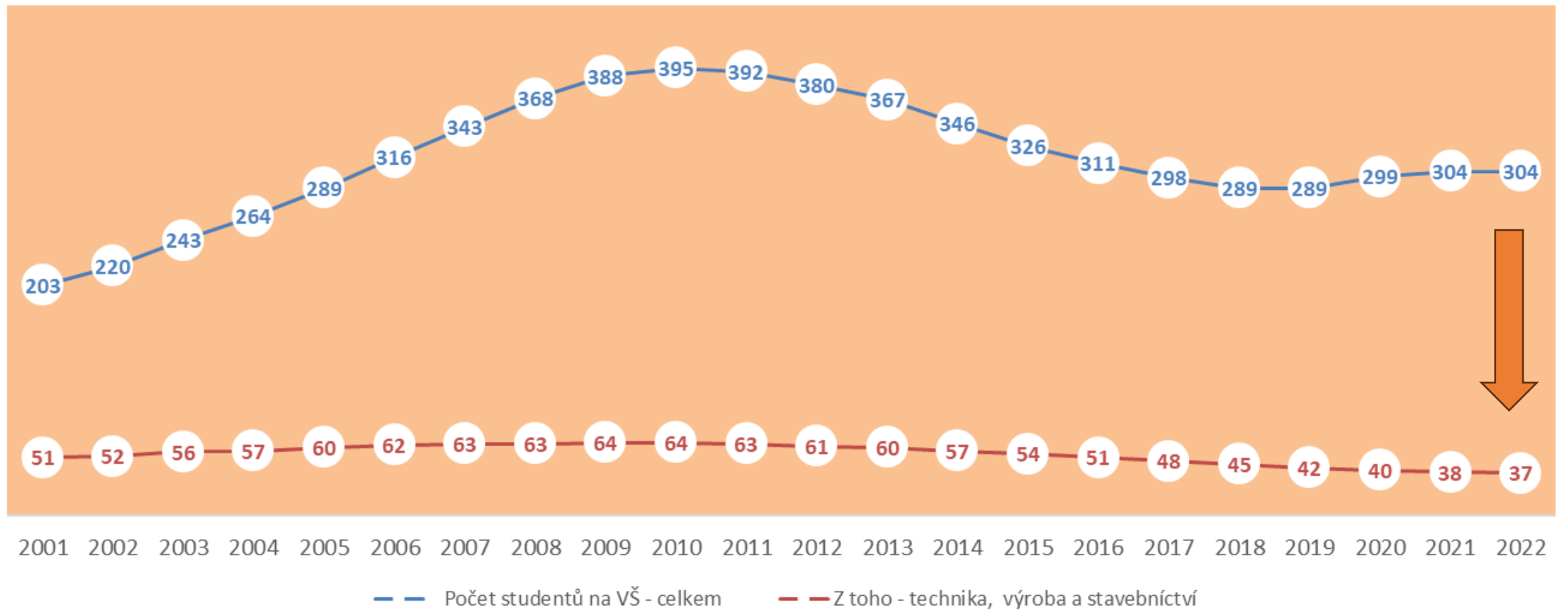
Bachelor Degree



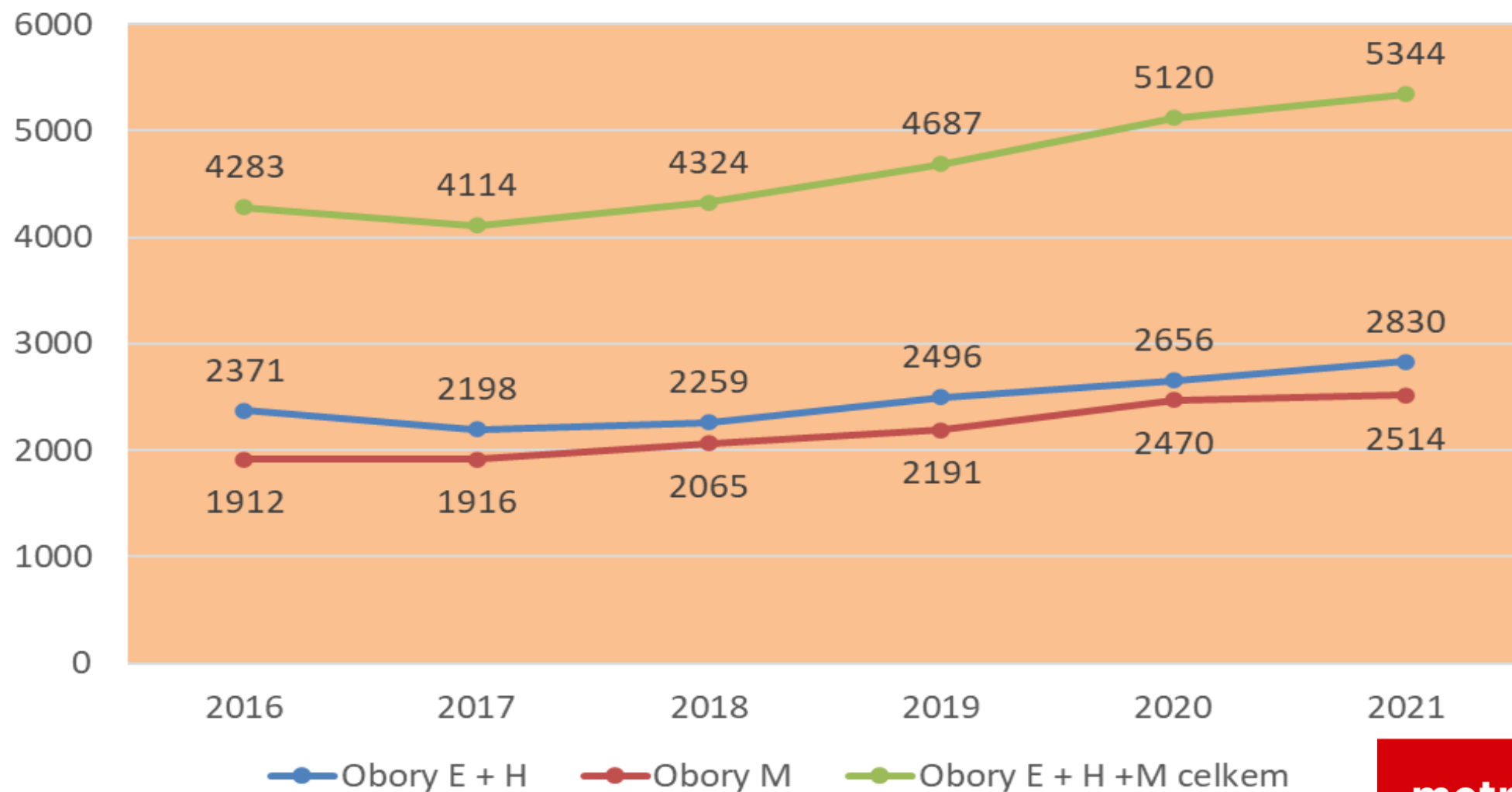
Master Degree



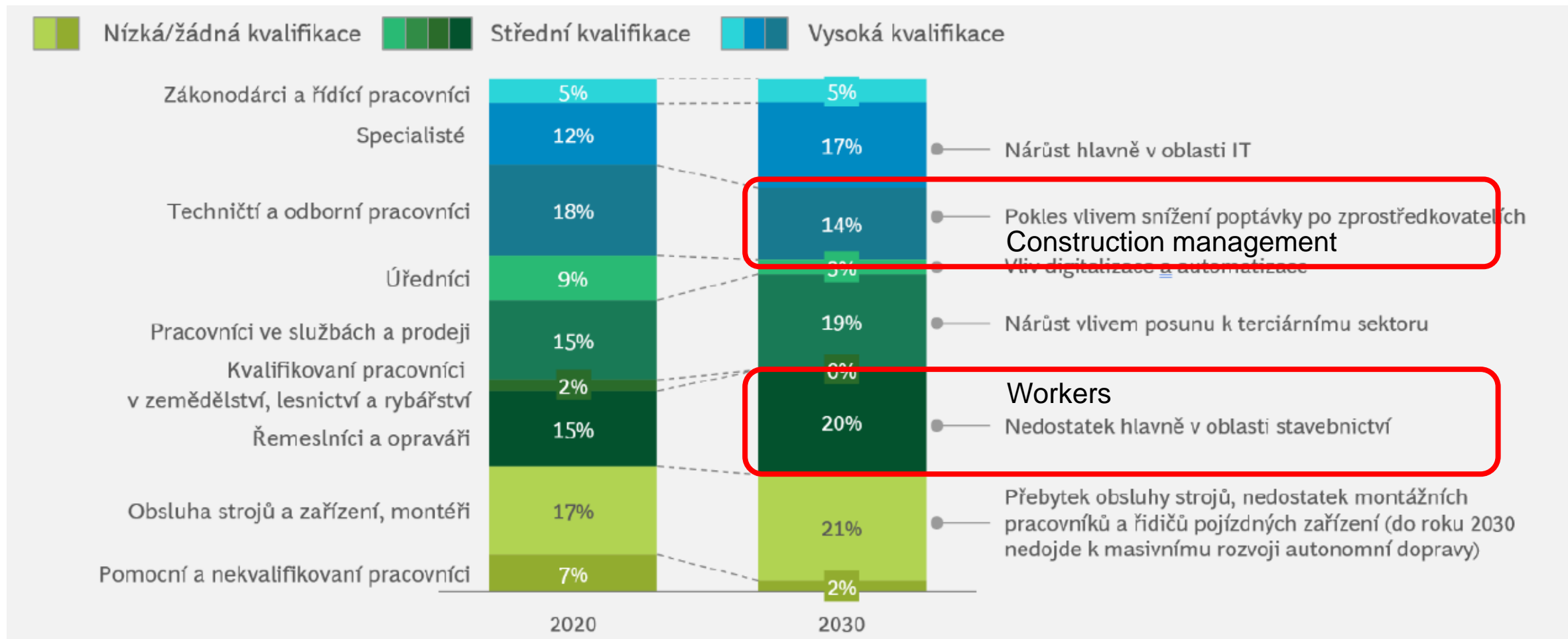
Number of students at Universities



Number of newly entered pupils in vocational schools - construction



Changing structure in the labour market

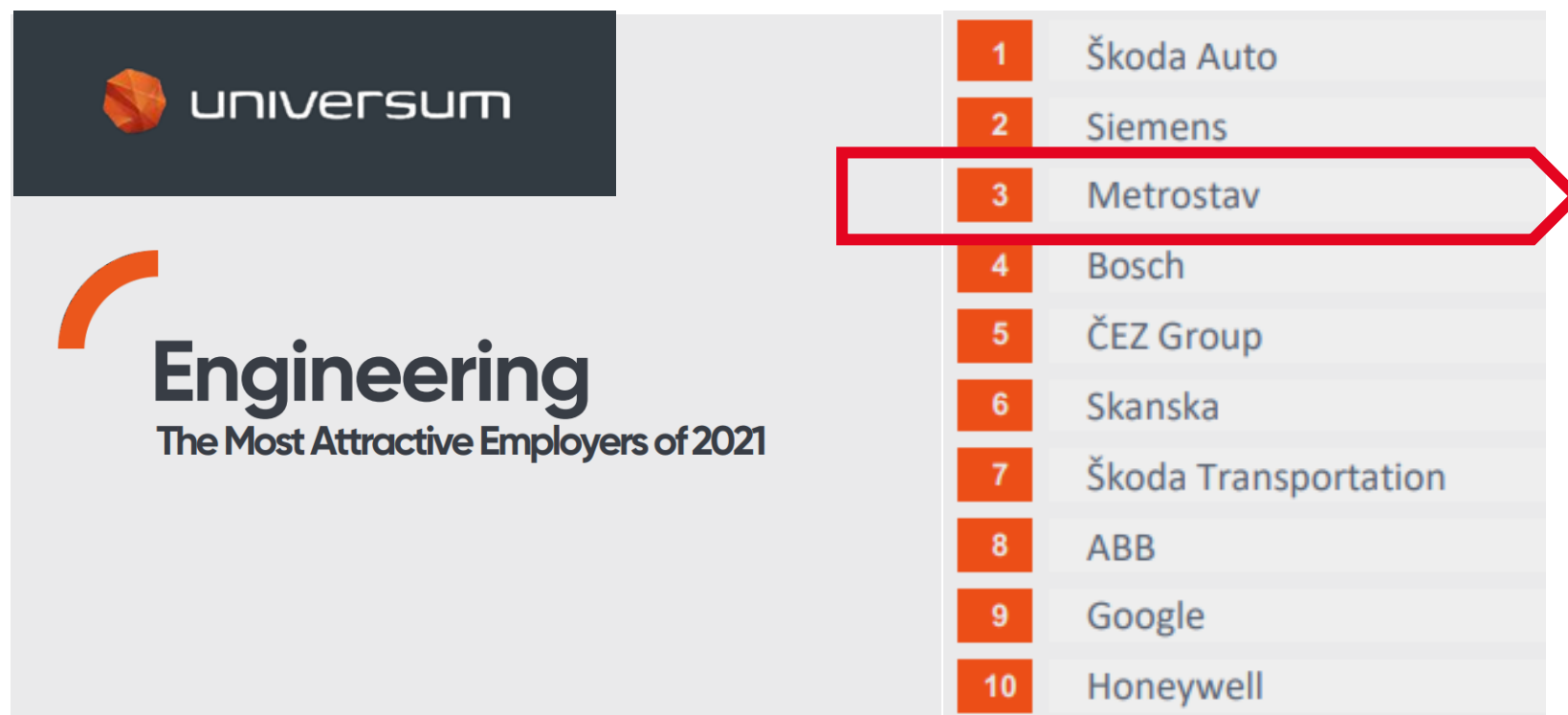


What to do?

Attract new employees/students to join the construction industry

- **Interesting projects with social importance and perspective/security of the future work**
- **Be attractive Employer**

Attractive employer through the eyes of university students



The most appreciated aspects



metrostav DIZ



Thank you

Ing. Lukáš Zedník
deputy director, Section 8
offer director EDU5

Metrostav DIZ spol. s r.o.
Koželužská 2450/4, 180 00 Praha 8

lukas.zednik@metrostavdiz.cz
www.metrostavdiz.cz



ALEŠ DOKULIL - NUVIA

OBCHODNÍ ŘEDITEL /
COMMERCIAL DIRECTOR





Sustainable labor force for Czech and European nuclear programme

CHALLENGES FOR OUR REGION

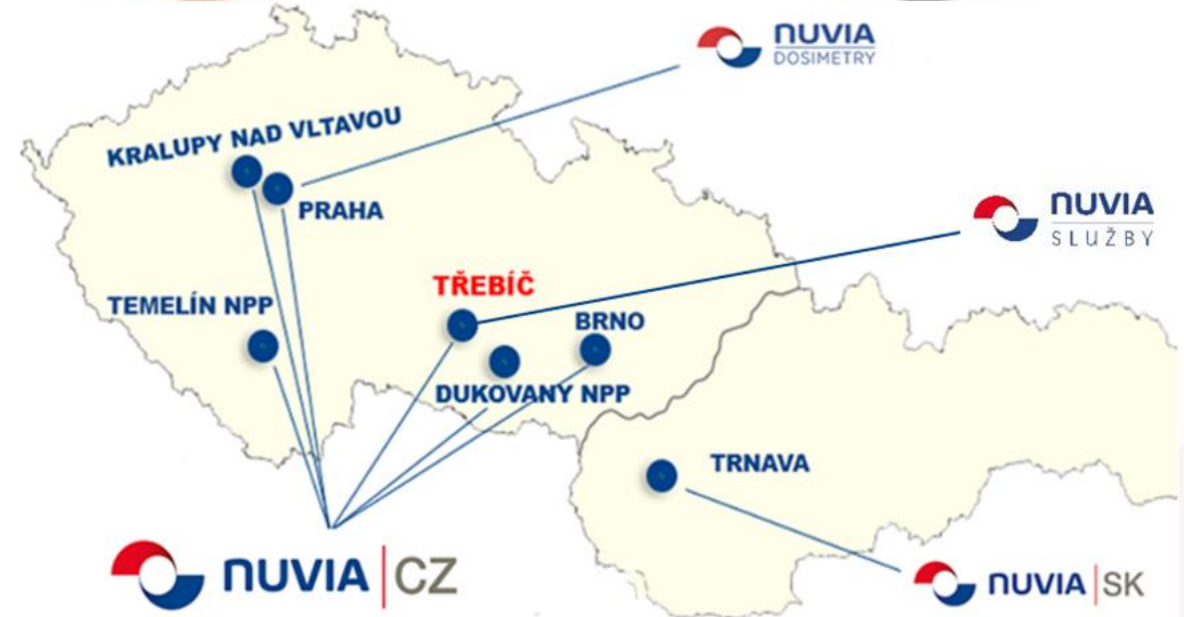
Aleš Dokulil, NUVIA Czech Republic

Supporting your energy



NUVIA CZ

- Established: 1995
 - In VINCI group: since 2012
 - HQ: Trebic, Czech Republic
 - Turnover 2022: 28,5 mil. EUR
-
- Industrial automation
 - Fire protection
 - Ionizing radiation measurements
 - Radiation monitoring systems
 - Radioactive waste sorting and characterisation
 - Scaffolding



PEOPLE

Current situation

Czech Republic

- NUVIA CZ
 - › 300 employees
- CEZ
 - › 22 700 employees
 - › 2 900 in nuclear
- Vinci Construction
 - › 4 200 employees in CZ

France

- NUVIA Group
 - › 1 400 employees (2 600 worldwide)
 - › 40 % in services
 - › 60 % in product development, engineering, training
- EDF
 - › 170 000 employees

CHALLENGES

Challenges of workforce sustainability in the nuclear industry

- Aging of existing employees
 - › CEZ Group – one third of employees between 50 – 59 years old
 - › 10 % of employees older than 60
- Competition
 - › With other industries
 - › With other new build projects (Poland, Hungary...)
 - › With other companies
 - 70 % of companies in Třebíč region are afraid of reducing labor availability and higher wage demands
- Education and training
 - › Nuclear
 - Very specific studying programme
 - Perception of industry as "dirty"
 - Dead-end for careers



SOLUTIONS

Ways to deal with these challenges

- Atractivity
 - › Support for field of studies
 - › Support for region atractivity
 - › New technologies – digitization, automation
- Government
 - › Train nuclear workers, boost innovation
- Cooperation
 - › With educational and development institutions
 - › Between current and new employees, transfer of know-how
 - › Between companies?



Thank you Merci





FRANTIŠEK KURAL - ZAT

MARKETINGOVÝ A OBCHODNÍ ŘEDITEL /
MARKETING AND COMMERCIAL DIRECTOR



ZAT a.s. - readiness for deliveries for nuclear power generation



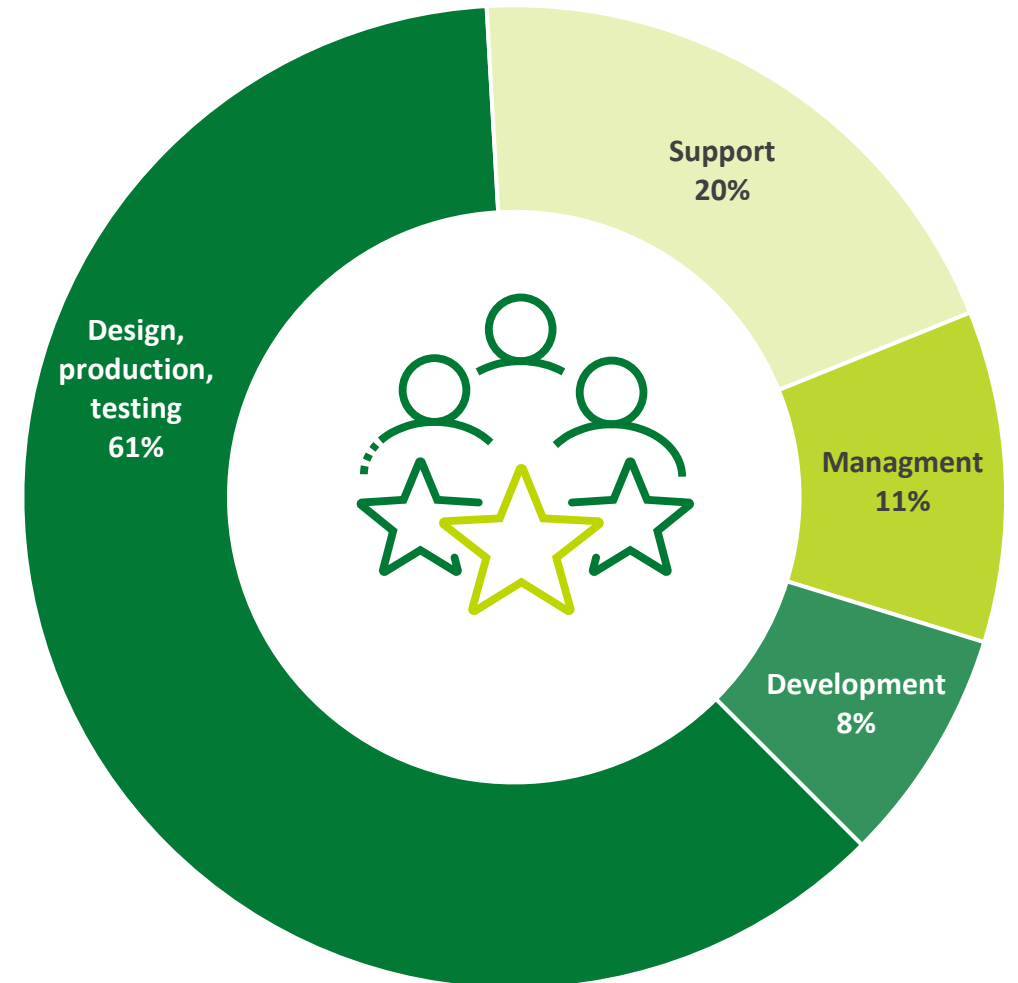
www.zat.cz

Introduction of ZAT

100% **Czech company** with a tradition
60 years of experience in industrial
automation

Wide range of competencies of **340**
employees

I&C systems for **demanding fields** of industry
Experience, quality & reliability



Broad nuclear experience

47 years of supplies to nuclear power plants

Licensed with **8 state nuclear safety authorities**

Deliveries of I&C for **37 nuclear units**

Total value of approx. **240 mil USD**
(approx. 188 mil USD in operation/
approx. 52 mil USD in production)



In USD at exchange rate: USD 1 = CZK 24

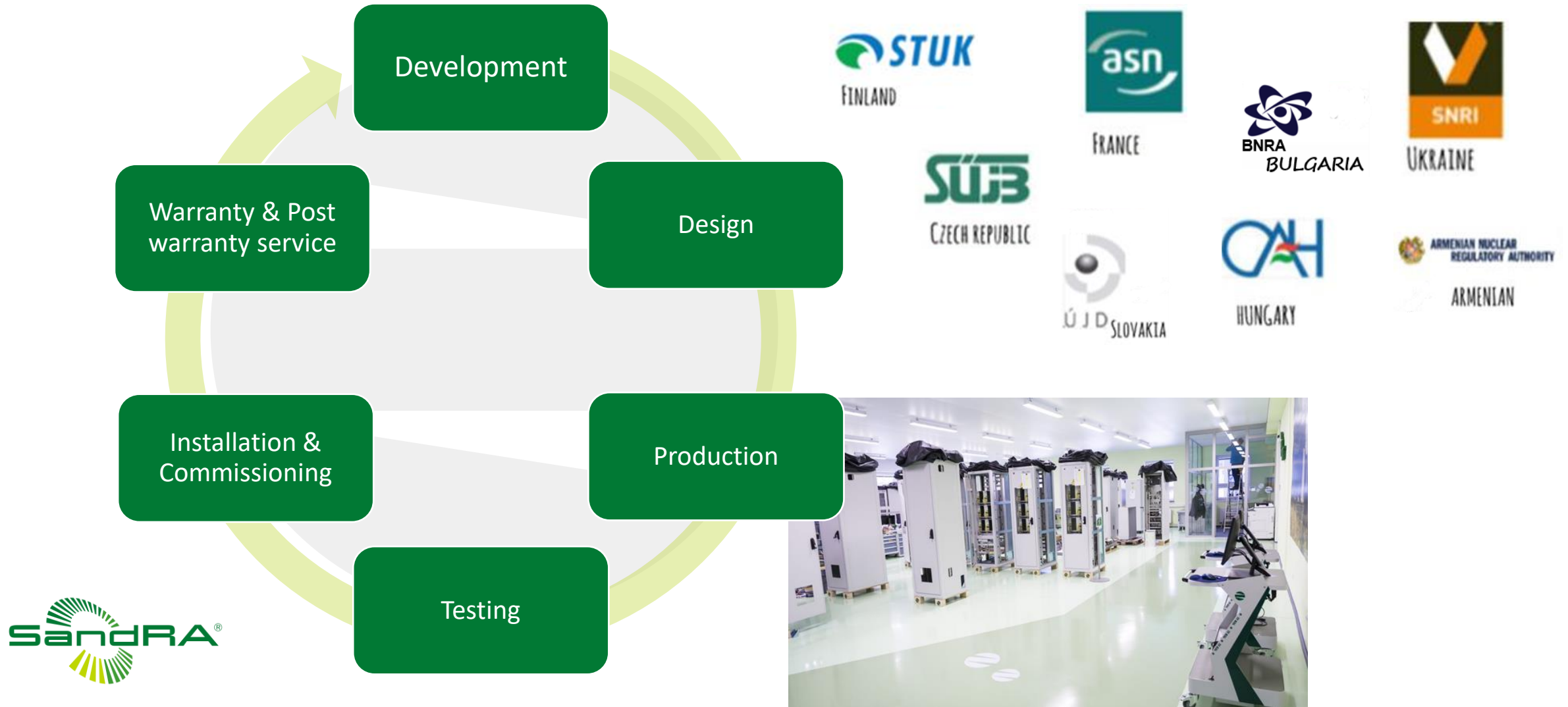


Solutions for nuclear power plants

- Based on the use of the **SandRA** platform
- **Complex supplies** from design to guaranteed service
- Portfolio of solutions for:
 - **Primary** part
 - **Secondary** part
 - **BoP**
- Know-how and experience from VVER projects used to provide **tailored solutions for various technologies**



ZAT as a provider of complex supplies of I&C systems



KULATÝ STŮL Č. 2 Udržitelná pracovní síla pro český a evropský jaderný program / **ROUNDTABLE NR 2** Sustainable labour force for Czech and European nuclear programme

Andrew Cockroft

senior manažer pro externí vztahy ze společnosti Hinkley Point C / Senior Manager - Stakeholder Relations from Hinkley Point C

Sarah Illouz - EDF

vedoucí nabídky EDF Dukovany 5 / Head of EDF's Dukovany 5 offer

Peter Szenasy - EPDOR

zakladatel a generální ředitel / Founder and Managing Director

Lukáš Zedník - Metrostav DIZ

zástupce ředitele; ředitel nabídky Dukovany 5 / Deputy Director; Director of EDF's Dukovany 5 offer

Aleš Dokulil - Nuvia

obchodní ředitel / Commercial Director

František Kural - ZAT

marketingový a obchodní ředitel / Marketing and Commercial Director



ZAHAJOVACÍ KOKTEJL FRANCOUZSKÉHO PAVILONU / OPENING COCKTAIL OF FRENCH PAVILON

11. 10. 2023 / 16:00 - 17:00

Brno Exhibition Centre

Výstaviště 405 / 1 - Hall V stand 33



TotalEnergies



**Auvergne-
Rhône-Alpes**



SUSTAINABLE BUSINESS FORUM

DĚKUJEM ZA POZORNOST /
THANK YOU FOR YOUR ATTENTION