

REINA project

World EU Cluster Initiative in Renewables and sustainable Energy InterNAtional



REINA project

Internationalisation Strategy Deployment:

- Brazil Wind Energy
- Mexico T&D
- Chile Solar Power



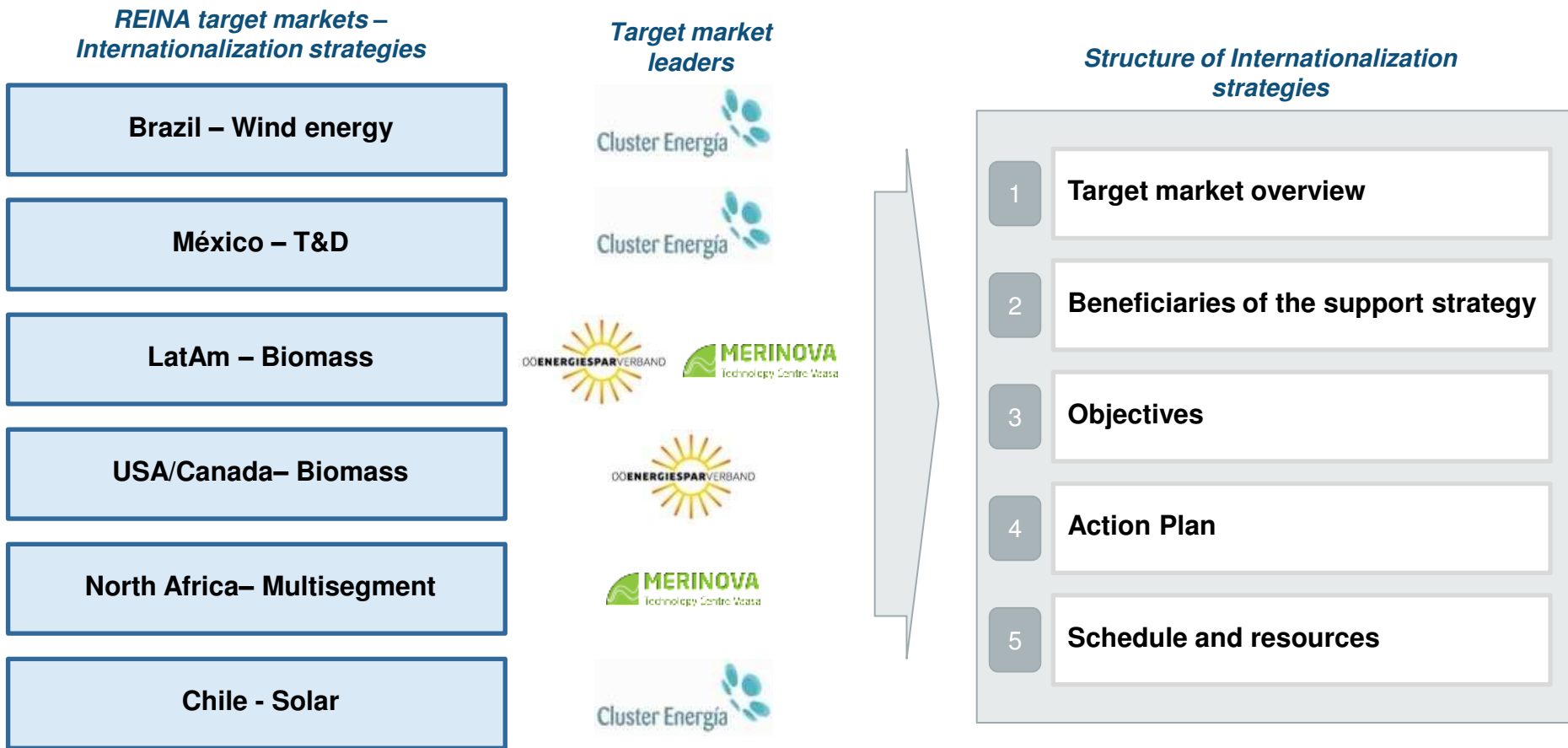
EU Initiative Promoting SME
Internationalisation Through Clusters



This initiative is supported by the European Commission's Directorate-General for Enterprise and Industry and financed under the Competitiveness and Innovation Framework Programme (CIP)

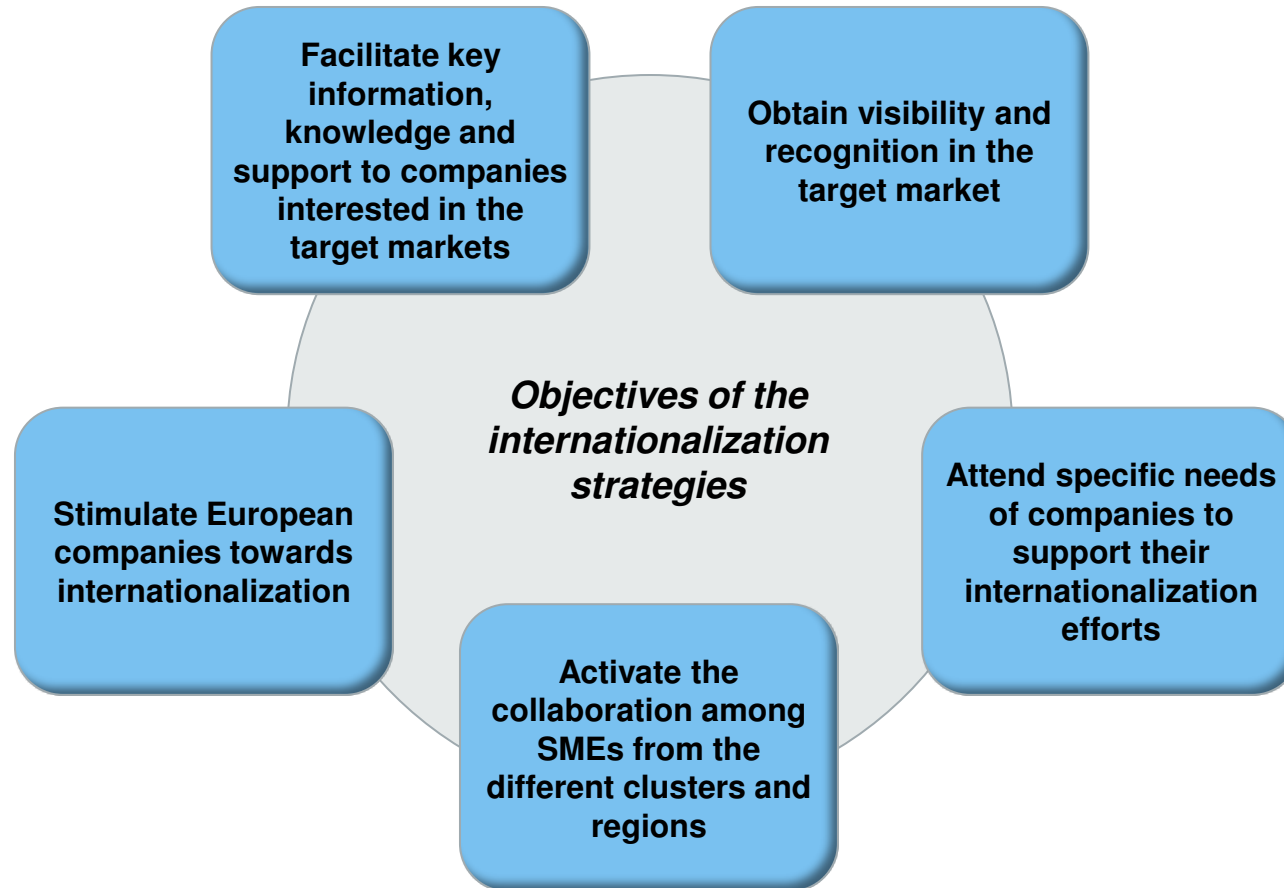


Six internationalization strategies for REINA target markets have been designed and developed following a common structure



... with a partner Cluster as a leader of each of them

The strategic objectives in all target markets go in a similar direction



... representing the whole scope of action of a cluster organization for supporting the internationalization of its companies

REINA project

World EU Cluster Initiative in Renewables and sustainable Energy InterNAtional



Internationalization Support Strategy

Target market: Brazil – Wind Energy

December 2013



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Internationalisation Through Clusters



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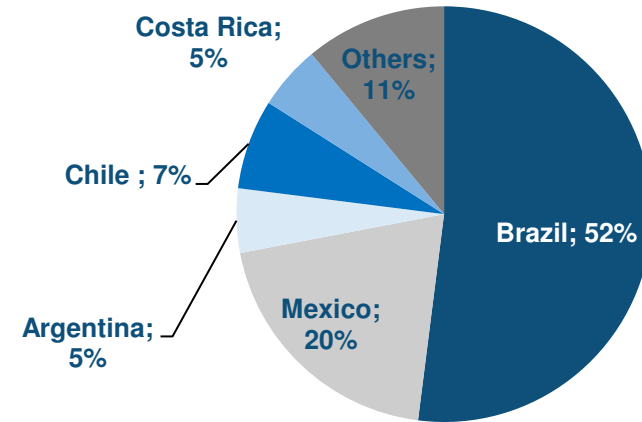
Wind energy in Brazil

- Brazil is the biggest market for wind energy in LatAm, representing more than half of the total wind potential capacity in this area
- The wind resource and the industrial base are in the coastal regions, close to main cities and populated areas
- Successful results in the last auction in August: 1505 MW for wind energy projects with an average price of 46,37\$/MWh. This figures are above the expectations of the wind companies before the auction.
- With a market outlook of 2000 MW/year, there are too many players in Brazil. It is believe that only 5 wind turbine providers will remain in the current market.
- The need of cheap money from BNDES forces the companies to locate the production in Brazil.
- BNDES is thought to be protecting the inefficient and unproductive Brazilian industry.

Target market: Brazil – Wind energy

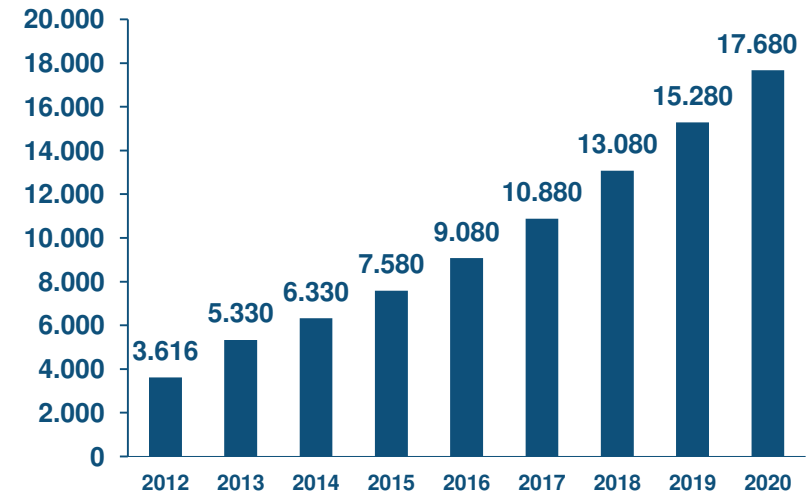
Latin America wind energy market.

Share (%) of the total potential capacity by region (2011)



Brazil wind market forecast 2012-2020

Cumulative capacity MW



The main objective of the strategy has been to encourage and facilitate the penetration of European companies, preferably SMEs, into Brazilian wind market

- Taking into consideration the scope of action of the REINA clusters and that beneficiaries of this strategy are surely in different steps within the internationalization process and have different needs, we have considered the three following operative objectives (and the correspondent indicators to measure its achievement):

1. Stimulate European companies towards internationalization

- indicator: number of companies participating in REINA internationalization meetings and events

2. Obtain visibility and recognition in the target market

- indicators: number of organizations in the target market contacted, participations in trade fairs, congresses or sectoral events, trade missions

3. Attend specific needs of companies to support their internationalization efforts

- Indicator: provision of market information

Wind Energy Value Chain



Wind Energy Value Chain

Grid conection



Management and control



Other services



Companies in the Wind sector initially considered as potential beneficiaries of the strategy

Wind energy companies in the Basque Country

Small companies <i>(less than 100 employees)</i>	Medium companies <i>(100-250 employees)</i>	Large companies <i>(more than 250 employees)</i>
<ul style="list-style-type: none"> ▪ Aplicación Nuevas Tecnologías Antec ▪ Euskal Forging ▪ Glual Hidráulica ▪ Intza ▪ Jema ▪ Mandrinados de Precisión ▪ Talleres Azpeitia 	<ul style="list-style-type: none"> ▪ Fundiciones WEC ▪ Matz-Erreka ▪ Fundiciones Garbi ▪ Zigor Corporación ▪ Etxe-Tar ▪ Aeroblade ▪ Construcciones Electromecanicas Consonni ▪ Juaristi TS Comercial 	<ul style="list-style-type: none"> ▪ Gamesa Corporación Tecnológica ▪ Iberdrola ▪ Global Energy Services ▪ Assistem ▪ Ingeteam Corporación ▪ TS Fundiciones ▪ Ormazabal y Compañía ▪ Grupo Guascor ▪ Hine ▪ Idom, Ingeniería y Consultoría ▪ ZIV Aplicaciones y Tecnología ▪ Arteché ▪ Tamoin Energias Renovables ▪ Elecnor ▪ Danobat

Wind energy companies in Vaasa

Small companies <i>(less than 100 employees)</i>	Medium companies <i>(100-250 employees)</i>	Large companies <i>(more than 250 employees)</i>
<ul style="list-style-type: none"> ▪ Mervento ▪ EPV Tuulivoima ▪ ENMAC ▪ Arctec ▪ VAMP ▪ KGN Tool ▪ Hydroll ▪ Labkotec ▪ AC Tower ▪ JTA-Connection ▪ NCE ▪ West Welding 	<ul style="list-style-type: none"> ▪ VEO ▪ Vacon ▪ The Switch ▪ Empower ▪ URV ▪ Levator ▪ Hollming Works 	<ul style="list-style-type: none"> ▪ ABB ▪ Schneider Electric ▪ Metso Foundries ▪ Siemens ▪ WinWinD

Deployment of the Action Plan: 5 major actions

- The Action Plan included a set of initiatives, each of them contributing to one or more of the objectives pursued.
- The Plan was enriched and fine tuned during its own development.
- The scope of this Action Plan is larger than REINA project, both in terms of resources needed and of time schedule (the cluster efforts in this line will probably go beyond the period covered by REINA)

Objectives

Stimulate European companies towards internationalization

Obtain visibility and recognition in the target market

Attend specific needs of companies to support their internationalization efforts

Actions

A1. Brazil internationalization learning seminar

A2. Directory of companies internationalised in Brazil

A3. Exploratory Mission + Participation in Wind Energy Conference

A4. Incoming mission of key Brazil stakeholders in the wind business, Seminar and Meetings.

A5. Participation in main Brazilian wind energy trade shows + 2014 Outgoing Mission

Action 1: Brazil internationalization learning seminar

Action 1			
Title of the action Brazil internationalization learning seminar			
Description of the action			
<ul style="list-style-type: none"> • Organization of a seminar focused in Brazil as a target market for doing businesses in the wind sector. • Learning approach: the seminar was oriented to share and take advantage of the knowledge and experience of cluster companies already established in Brazil and to offer value added information and advice to those interested in that country (with participation of Brazil experts) • The expected audience were the potential beneficiaries of the REINA support actions, this is, the companies from each cluster that could face an internationalization process towards Brazil 			
Objectives / expected results	Intercluster collaboration	Resources needed	Timing and Results
<p>Encourage companies towards internationalization</p> <p>Obtain company involvement in REINA project and its next actions</p> <p>Create a sort of networking among companies to solve doubts and to get advice in internationalization issues</p>	<p>-In parallel organization of seminars in the regions involved (Basque Country and Vaasa)</p> <p>-Collaboration in the design of the seminar and sharing of key speakers .</p> <p>-First steps in the collaboration between Gamesa and Merinova's companies, as possible suppliers of Gamesa</p>	<p>Design and organization of the seminar by each host cluster .</p> <p>Logistic expenses.</p> <p>Speakers from companies already internationalized .</p> <p>Speakers from Brazil (at least covering their travel and subsistence expenses)</p>	<p>20/11/2012</p> <p>Nº of Companies: 27</p> <p>Nº of attendees: 36</p>

Action 1: Brazil internationalization learning seminar

I. November 20:

First Brazil internationalization Learning Seminar

JORNADA ENERGÍA EÓLICA BRASIL

Fecha: 20 de noviembre 2012
Lugar: Salón de actos de SPRI (Plaza Bizkaia, Bilbao. Alda. Urquijo 36)

AGENDA

Hora	Tema	Ponente
09:00	Apertura Bienvenida y Presentación	Sr. D. David Fernández Terreros (Dtor. Dpto. Internacional SPRI)
09:10	El sector eólico en Brasil. Actualidad y perspectivas.	Sr. D. F. Javier Ruíz (Socio de EUROPRAXIS)
09:30	Claves administrativas y legales en Brasil (Sector Eólico)	Sr. D. Leonardo Briganti (Dtor. Briganti Advogados)
10:30	Sistema eléctrico de Brasil. Aspectos regulatorios.	Sr. D. Rui Guilherme Altieri Silva (Superintendente de Regulación dos Serviços de Generación. ANEEL)
11:15	Descanso	
11:45	Energía eólica en Brasil. Mercado potencial. Estrategias de implantación.	Sr. D. Manuel Palero (GAMESA)
12:15	Mesa redonda con empresas del Cluster implantadas en Brasil y coloquio abierto.	Sr. D. José Miguel Gabilondo (ZIGOR) Sr. D. Lander Guibelalde (HINE) Sr. D. Joseba Clemente (ARTECHE) Sr. D. David Solé (INGETEAM)
13:15	Clausura. Sr. D. J.J. Alonso, (Dtor. Cluster de Energía)	

Modo de inscripción: Envío de nombre de la empresa y personal(s) asistentes) a mail@clusterenergia.com o por teléfono: 94 424 92 11.

A project co-financed by the European Commission
European Commission Enterprise and Industry
European Cluster Collaboration Platform

Time	Topic	Speaker
09:00	Opening Welcome and Presentation	Mr. D. David Fernández Terreros (Dtor. Dpto. Internacional SPRI)
09:10	Brazilian wind sector. Present situation and prospects	Mr. D. F. Javier Ruíz (Socio de EUROPRAXIS)
09:30	Administrative and legal keys in Brazil (Wind sector)	Mr. D. Leonardo Briganti (Dtor. Briganti Advogados)
10:30	Brazilian Electric System. Regulatory aspects.	Mr. D. Rui Guilherme Altieri Silva (Superintendente de Regulación dos Serviços de Generación. ANEEL)
11:15	Break	
11:45	Wind Energy in Brazil. Potential Market. Deployment strategies.	Mr. D. Manuel Palero (GAMESA)
12:15	Panel discussion with companies implanted in Brazil and colloquium.	Mr. D. José Miguel Gabilondo (ZIGOR) Mr. D. Lander Guibelalde (HINE) Mr. D. Joseba Clemente (ARTECHE) Mr. D. David Solé (INGETEAM)
13:15	Closure. Mr. D. J.J. Alonso, (Dtor. Cluster de Energía)	

Action 2: Directory of companies internationalized in Brazil

Action 2			
Title of the action Directory of companies internationalized in Brazil			
Description of the action			
<ul style="list-style-type: none"> • Identification of companies from the region already established in Brazil • Type of companies included <ul style="list-style-type: none"> • Wind sector companies • Other energy sectors companies • Other relevant companies from the region in other sectors • Including two type of contents: <ul style="list-style-type: none"> • General information about the company (SME/large), type of implantation (productive/commercial), activity in Brazil and its location • Contact details 			
Objectives / expected results	Intercluster collaboration	Resources needed	Timing and Results
<p>Facilitate contact and networking among companies interested in a specific international market.</p> <p>Create a sort of networking among companies to solve doubts and to get advice in internationalization issues.</p>	<p>An integrated directory including companies from the three clusters</p>	<p>Gathering of the information from companies (internet research or an ad-hoc survey).</p> <p>Integration in a document or electronic platform for its distribution.</p>	<p>READY SINCE MARCH 2013</p> <p>Number of companies from both clusters identified: 14</p>

Action 3: Exploratory Mission + Participation in Wind Energy Conference

Action 3

Title of the action

Exploratory Mission + Participation in Wind Energy Conference

Description of the action

- Joint participation of REINA clusters and its companies in a key event in Brazil around the wind energy sector
- European Cluster Collaboration Experiences speech, made by ENERGY CLUSTER and MERINOVA.
- Brazil Wind Energy Conference. Sao Paulo 27-29 May 2013

The attendance to Brazil Wind Energy Conference was aimed to get first-hand information from the different players of the wind energy sector. Different opinions were clearly identify depending on which was the interlocutor position in the wind energy value chain. This is the reason why the Basque Government delegation in Sao Paulo and the Energy Cluster define an agenda for 3 days.

Objectives / expected results

- Long-term relationships
- Articles written by Mr. Johan W.
- GAMESA contact for MERINOVA's companies.
- Obtain visibility.
- Contacts to be shared.
- Dissemination of a complete updated report with the key findings.

Intercluster collaboration

- Wind Energy Capacity leaflet. Promoting REINA consortium companies.
- Energy Cluster and Merinova, speakers in BWEC. European Cluster Collaboration Experience.
- Information and contacts sharing through the exchange of the mission reports.

Resources needed

- Wind Energy Capacity leaflet.
- Conference passes.
- Travel and subsistence expenses of REINA members.
- Meeting agenda with:
*show in next slide

Timing

27-29 May 2013

Nº of meetings with stakeholders: 11

MoU proposals (in negotiation): 3

Action 3: Exploratory Mission + Participation in Wind Energy Conference

Action 3

Title of the action

Exploratory Mission + Participation in Wind Energy Conference

Meeting Agenda

Day 1

BWEC Conference

GAMESA – Goretti Sampayo

Day 2

BWEC Conference

European Cluster Collaboration experience Speech - Johan Wasberg, Iñaki Gorriño and Imanol Ortiz

AGDI (Agencia Gaucha de Desenvolvimento e Promoção do Investimento) – Marco A. Franceschi

General Electric – Mr. Hernan Saavedra

Iberdrola – Ms. Laura Porto

Governo de Bahia – Rafael Valverde

Ceara State.ADECE – Diego Romano

Day 3

ALSTOM – Axel Woelz

ABIMAQ – Mr. Roberto Veiga

ABINEE – Mr. Mario Roberto Branco

ABEEOLICA – Ms. Elbia Melo

Action 4: Incoming mission of key Brazil stakeholders in the wind business

Action 4			
Title of the action Incoming mission of key wind Brazil stakeholders + Seminar + B2B meetings			
Description of the action			
<ul style="list-style-type: none"> • Organization of an incoming mission of Brazil wind key agents to Europe in order to present them our experience and capabilities in the wind industry, our organization in clusters, etc and to seek for potential opportunities for our companies to do businesses in Brazil • The mission will be structured in several parts <ul style="list-style-type: none"> • Institutional meetings (Regional Administration) • Conference • Company visits and bilateral meetings 			
Objectives / expected results	Intercluster collaboration	Resources needed	Timing and Results
Obtain visibility and recognition in the target market	<p>Use of Brazil wind energy sector information and contacts generated in the intercluster participation in BWEC, May 2013.</p> <p>Invitation and dissemination of the event between partners.</p> <p>Companies from MERINOVA attending the seminar.</p>	<ul style="list-style-type: none"> • Meeting rooms and auditorium. • Brazil contacts and organization of the mission. • Travel and subsistence expenses of Brazilian stakeholders. 	<p>December 2013</p> <p>Nº of Companies attending: 51 (up to now)</p> <p>Nº of expressions of interest for 2014 mission:”??”</p>

Action 5: Outgoing mission to Brazil

Action 5

Title of the action

Outgoing mission to Brazil + Participation in main Brazilian wind energy event

Description of the action

As a result of the exploratory mission to Brazil in May 2013, we knew that the development of the Brazil wind energy market depended on the auction of last August. Aware of the difficulties in organizing a mission in a short time (between the auction and the incoming mission), and due to the lack of events regarding the wind energy sector, we are planning an outgoing mission to Brazil in 2014.

- Organization of a trade missions to Brazil, mainly focused on the wind energy sector with REINA consortium companies
- Active participation in main event (Shared stand or speech in a conference)

Objectives / expected results

Obtain visibility and recognition in the target market .

Support company specific internationalization processes.

Meet needs generated after the last auction.

Intercluster collaboration

Share information and contacts achieved at the cluster level.

Participation of companies from the different REINA clusters.

Resources needed

Brazil contacts and organization of the mission.

Travel and subsistence expenses of REINA members.

Scholars to support expenses of participant companies.

Timing

Planned for 2014

Dates: March or August*

***Brazil Windpower 2014**

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Internationalization Support Strategy

Target market: Mexico – T&D

December 2013



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Context

Target market overview	
Main characteristics of Mexico	<ul style="list-style-type: none"> • 14th economy in the world and the 2nd in Latin America behind Brazil, with a GDP of \$1.66 trillion • Although the average annual growth in the past decade (2.1%) has been below the Latin American countries average (3.2%), prospects for future growth around 3.8% annually, will position Mexico as the world's 10th largest economy by 2020 • Mexico promotes economic openness, free trade and embraces globalization
T&D in Mexico	<ul style="list-style-type: none"> • Mexico's power generation, according to the National Energy Strategy, will increase at an average 3,86% per year up to 2026 • The nearly 1,5 million km-length T&D network supplies energy to a 97% of the population, but the T&D system is relatively mature and losses have been increasing in the last decade and need to be reduced to reach the 6-8% international benchmark, especially in Central Mexico, the most populated region • The state controls the majority of the electricity sector through the state-owned utility CFE (Comisión Federal de Electricidad), which concentrates the 70% of the power generation capacity and operates the T&D network as a monopoly • Foreign suppliers have several ways to enter the Mexican market of electrical equipment and material mainly through direct contracts with state-owned tenderers (CFE) or via private intermediaries (EPCs and local manufacturers)

Beneficiaries of the strategy

- The Mexican T&D market meets the interest of companies within the Basque Country (Spain) and Vaasa (Finland), and thus, the strategy envisages the collaborating among both clusters
 - In addition, Upper Austrian companies are also potential beneficiaries even though the T&D sector has less importance in that partner region
- In principle, the potential beneficiaries of this strategy are the whole group of companies in the T&D sector within the REINA participant regions.
 - Around 50 T&D companies in the Basque Country and Vaasa (see next page)
- In the Basque Country there is an initial group of companies in the T&D sector, with interest and/or plans of internationalization.
 - The strategy to be defined should facilitate the internationalization processes of these companies
- In addition, REINA project takes advantage of the experience and knowledge of other companies in the cluster already internationalized, in particular, companies doing business in T&D in Mexico

Companies in the T&D sector initially consider as potential beneficiaries of the strategy

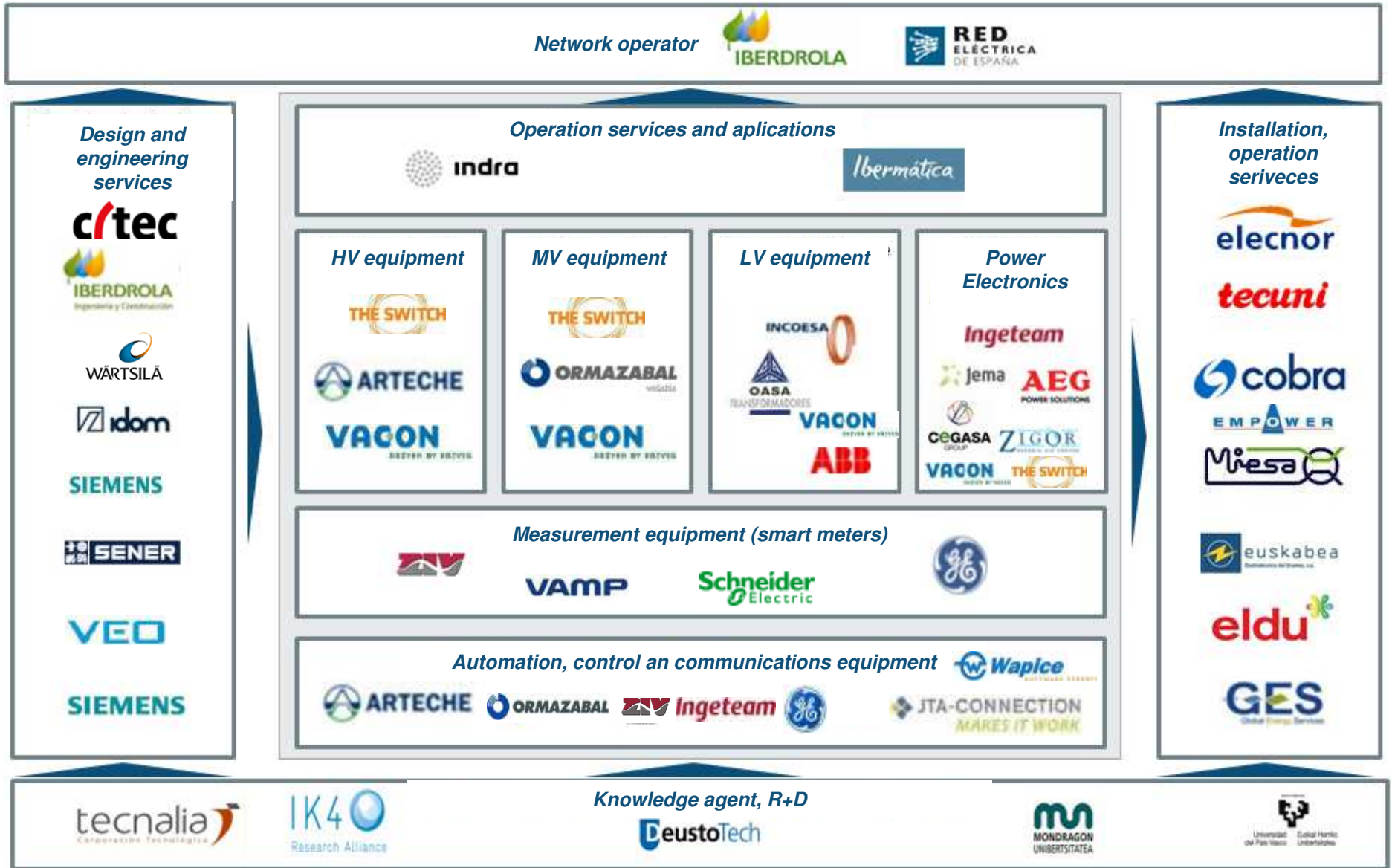
T&D energy companies in the Basque Country

<i>Small companies</i> (less than 100 employees)	<i>Medium companies</i> (100-250 employees)	<i>Large companies</i> (more than 250 employees)
<ul style="list-style-type: none"> ▪ Alconza Berango ▪ Almacenes Eléctricos Vitoria ▪ Eléctricas Asmotur Uriarte ▪ Electricidad Guria ▪ Genalt 2000 ▪ Incoesa Trafodis ▪ Industrias Arruti ▪ Instalaciones y montajes eléctricos del Valle Aguayo ▪ Jema ▪ OASA Transformadores XXI 	<ul style="list-style-type: none"> ▪ Alkargo ▪ Construcciones Electromecanicas Consonni ▪ E.D.S. Ingeniería y Montajes ▪ ECN Cable Group ▪ Miesa Ingeniería ▪ Zigor Corporación 	<ul style="list-style-type: none"> ▪ Arteche ▪ Celaya Empananza y Galdós (Cegasa) ▪ Elecnor ▪ Elektra ▪ Iberdrola ▪ Idom, Ingeniería y Consultoría ▪ Ingeniería, estudios y proyectos NIP (NIPSA) ▪ Ingeteam Corporación ▪ Ormazabal y Compañía ▪ Pronutec ▪ Tecuni ▪ ZIV Aplicaciones y Tecnología

T&D energy companies in Vaasa

<i>Small companies</i> (less than 100 employees)	<i>Medium companies</i> (100-250 employees)	<i>Large companies</i> (more than 250 employees)
<ul style="list-style-type: none"> ▪ VAMP Oy ▪ Arcteq Oy ▪ CLS-Engineering Oy ▪ Elektromaster Oy ▪ Rikta Oy ▪ Ravera Oy ▪ Selecon Oy 	<ul style="list-style-type: none"> ▪ VEO Oy ▪ The Switch 	<ul style="list-style-type: none"> ▪ Asea Brown Boveri (ABB) ▪ Citec Oy ▪ Vacon Oyj ▪ Schneider Electric Finland Oy ▪ Wapice Oy

T&D Value Chain Capacities



Deployment of the Action Plan

- The Action Plan included a set of initiatives, each of them contributing to one or more of the objectives pursued.
- The scope of this Action Plan is larger than REINA project, both in terms of resources needed and of time schedule (the cluster efforts in this line will probably go beyond the period covered by REINA)

Objectives

Activate the collaboration among SMEs and stimulate European companies towards internationalization

Obtain visibility and recognition in the target market

Facilitate key information, knowledge and support to companies interested in the target market

Actions

A1. Mexico internationalization learning seminar

A2. SMEs collaboration towards internationalization

A3. Incoming mission of CFE

A4. Outgoing missions to México

A5. Participation in main T&D related trade shows in Mexico

Action 1 and 3: Mexico internationalization learning seminar

Action 1	Action 3			
Title of the action Mexico internationalization learning seminar + Incoming mission of CFE				
Description of the action				
<ul style="list-style-type: none"> • Organization of a seminar focused in Mexico as a target market for doing businesses in the T&D sector. • Organization of an incoming mission of representatives CFE to Europe in order to present them our experience and capabilities in the T&D sector, our organization in clusters, etc and to seek for potential opportunities for our companies to do businesses in Mexico. CFE will participate in the learning seminar. <p><i>Due to difficulties in attracting CFE to take part in the learning seminar, this action had to be altered. Attracting CFE to the Basque Country was one the objectives established for the outgoing mission which is described below.</i></p>				
Objectives / expected results	Intercluster collaboration	Resources needed	Timing	
			Planned for the first semester of 2014.	

Action 2: SMEs collaboration towards internationalization

Action 2			
Title of the action SMEs collaboration towards internationalization			
Description of the action			
<ul style="list-style-type: none"> • Collaboration is considered as an important way to access foreign markets for companies with less experience and resources, in particular within the T&D business. In fact, many times it might be the first alternative and the only option to make internationalisation feasible for these kind of companies • This action tries to identify and promote collaboration opportunities among SMEs that helps them to begin or/and advance in their internationalization processes • Under this heading, we include basically seminars and workshops with SMEs to discuss with them the potential of collaboration for internationalization (initially, not necessarily focusing in a specific market such as Mexico) 			
Objectives / expected results	Intercluster collaboration	Resources needed	Timing and Results
<p>Encourage collaboration and involvement among SMEs towards internationalization:</p> <ul style="list-style-type: none"> -REINA project introduction. -Objectives and scope. -Potential target markets. -Discussion and choice of geographic markets. -Presentation and discussion on the list of actions to be performed. 	<p>Contacts and exchange of information between cluster organizations. (Mainly MERINOVA and CEPV)</p>	<p>Organisation of seminars and workshops with SMEs.</p>	<p>First workshop in September 2012.</p> <p>Second Session October 2012.</p> <p>Third session in May 2013</p> <p>Nº of companies: 20</p>

Action 4 and 5: Outgoing mission to Mexico

	Action 4	Action 5		
Title of the action	Outgoing missions to Mexico + Participation in main T&D related trade show in Mexico			
Description of the action	<ul style="list-style-type: none"> • Organization of exploratory and trade missions to Mexico, to set up contacts and obtain information of the T&D market. • Joint participation of REINA clusters and its companies in the event “The Green Expo – PowerMex 2013”. Joint stand to promote the project and the consortium companies. • Meeting agenda in parallel with the REINA presence in the exhibition: <ul style="list-style-type: none"> • Basque Delegation and Basque Companies in Mexico. • Energy Regulatory Commission (Comisión Reguladora de Energía CRE) • Federal Commission of Electricity (Comisión Federal de Electricidad CFE) • Electricity Research Institute (Instituto de Investigaciones Eléctricas IIE) 			
Objectives / expected results	Intercluster collaboration	Resources needed	Timing and Results	
<p>Obtain visibility and recognition in the target market.</p> <p>Mission report with first-hand information to be shared.</p> <p>Support company specific internationalization processes.</p> <p>Establish relationship with key contacts in the T&D sector.</p>	<p>Share information and contacts achieved at the cluster level.</p> <p>Collaboration in the selection of key tradeshows and arrangements to attend them.</p> <p>Joint participation of companies from the different REINA clusters (sharing of the same stand).</p>	<p>Mexico contacts and organization of the mission.</p> <p>Joint stand for REINA companies.</p> <p>T&D Capacity leaflet.</p> <p>Travel and subsistence expenses of REINA members.</p>	<p>25-27 September. Mexico City</p> <p>Contacts in Exhibition: 57</p> <p>Mexican stakeholders: 6</p> <p>MoU proposals: 2</p>	

Action 4 and 5: Outgoing mission to Mexico

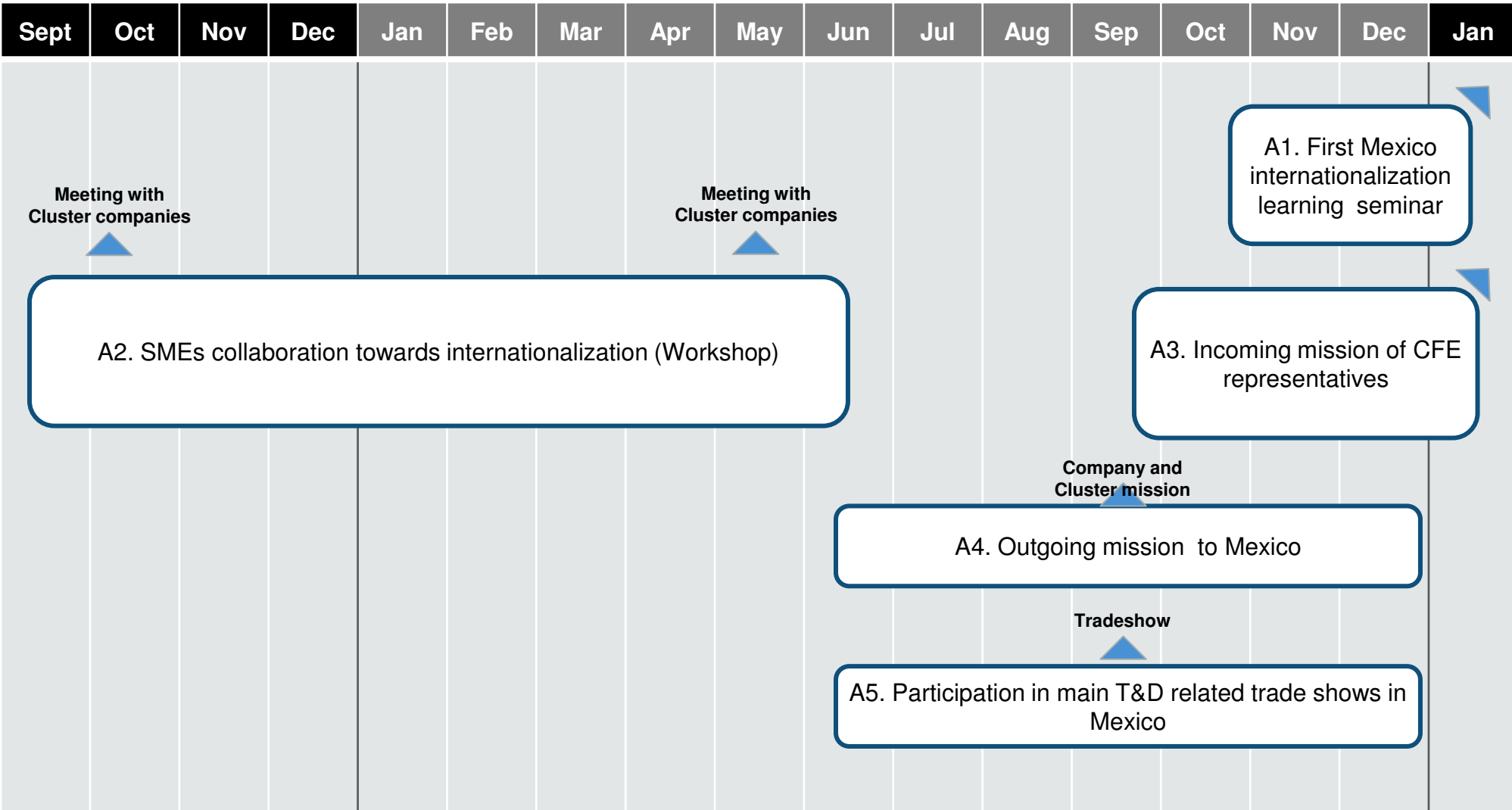
	Action 4	Action 5	
Title of the action	Outgoing missions to Mexico + Participation in main T&D related trade show in Mexico		
Meeting Agenda	<p><u>Day 1</u></p> <p>Stand in PowerMex. Contacts: 27</p> <ul style="list-style-type: none"> • Visit of Mr. Leonardo Beltrán Rodríguez – Subsecretary of Planification and Energetic Transition SENER. • Visit of the Basque Government Delegate in Mexico. Mr. Ibon Mendibelzua. • Visit to the stand of JEMA (member of CEPV). 	<p><u>Day 2</u></p> <p>Stand in PowerMex. Contacts: 12</p> <ul style="list-style-type: none"> • CRE (Comisión Reguladora de Energía) – Mr. Francisco Barnés de Castro • Meeting with ARTECHE – Mr. Santiago Barcón (General Manager of Artech in Mexico and North America) • Meeting with representatives and delegates of 9 companies members of REINA clusters. 	<p><u>Day 3</u></p> <p>Stand in PowerMex. Contacts: 18</p> <ul style="list-style-type: none"> • CFE (Comisión Federal de Electricidad) – Mr. Benjamín Granados and 5 top CFE managers. • IIE (Instituto de Investigaciones Eléctricas) – Mrs. Rocío Pérez and Mr. Manuel Fernandez. • Meeting with Cleantech Cluster – Ms. Sofia Aguado. Similar Cluster to CEPV. Actually working on a MoU.

Calendar of actions

2012

2013

2014



REINA project

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Internationalization Support Strategy

Target market: Chile – Solar Thermal Power

December 2013



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Solar Thermal Power (CSP) in Chile

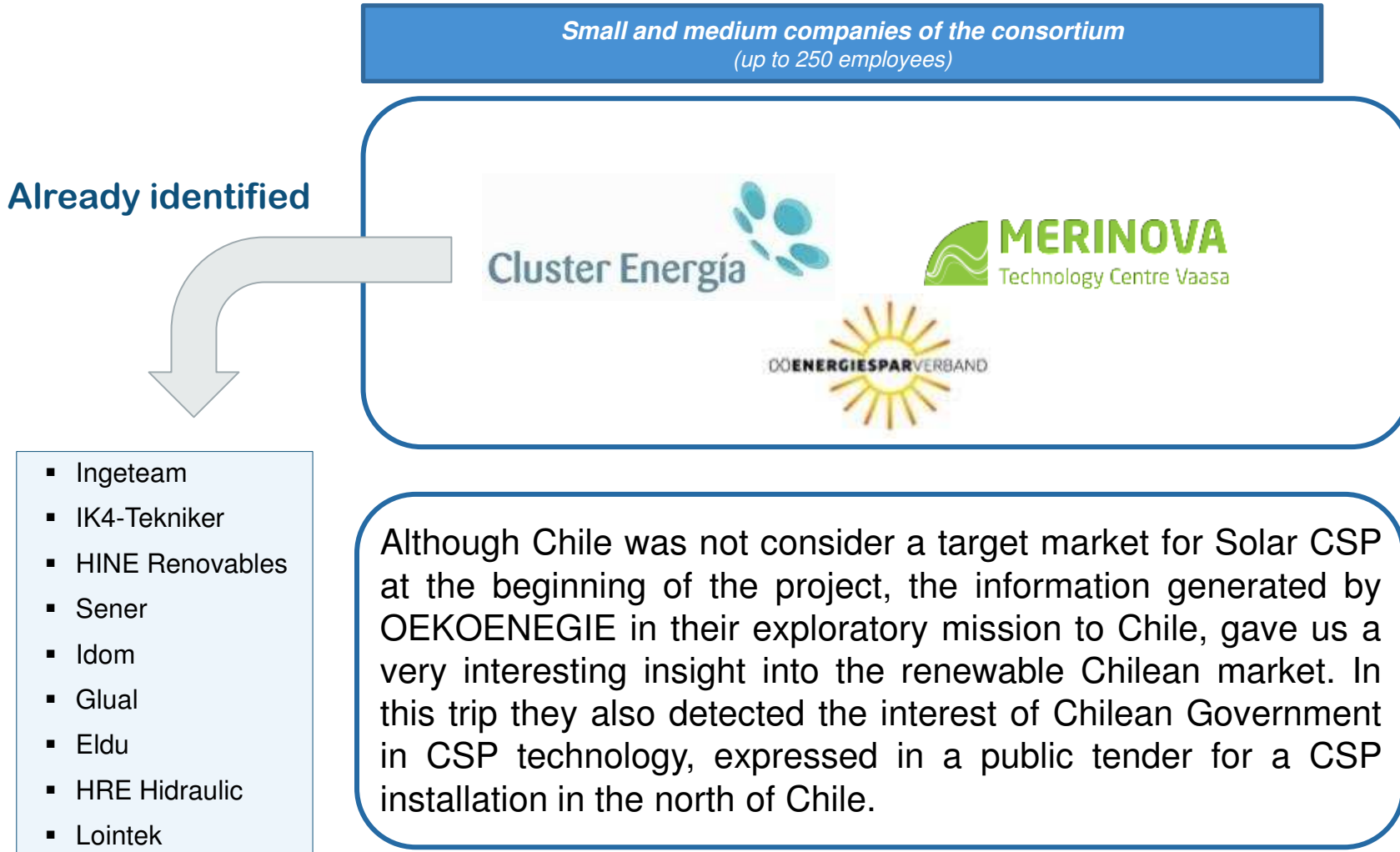
- Chile is considered a potential future market for CSP technologies, the confluence of several factors: high energy demand (current and future) in the mining sector, high solar radiation in the northern part of the country, government interest in developing this renewable sector.
- The main actual barrier for installation of CSP plants is the high differential between energy prices (120-130 \$ / MWh in SING area, north) and the estimated cost of production of CSP facilities in that area (180-200 \$ / MWh), which does not allow the signing of PPAs between development companies and mining companies leads.
- The Chilean government is interested in developing a solar renewable sector, but not to regulate these technologies with subsidiaries.
- Spanish companies that have been heavily involved in the growth of large CSP plants in Spain in recent years, are present and active in Chile trying to push the CSP market in this country (and others throughout the world, after the demise of the domestic market).

Solar Irradiation map in Chile



Source: Visión del uso de la energía solar térmica en Chile 2010

Companies in the Solar sector beneficiaries of the strategy

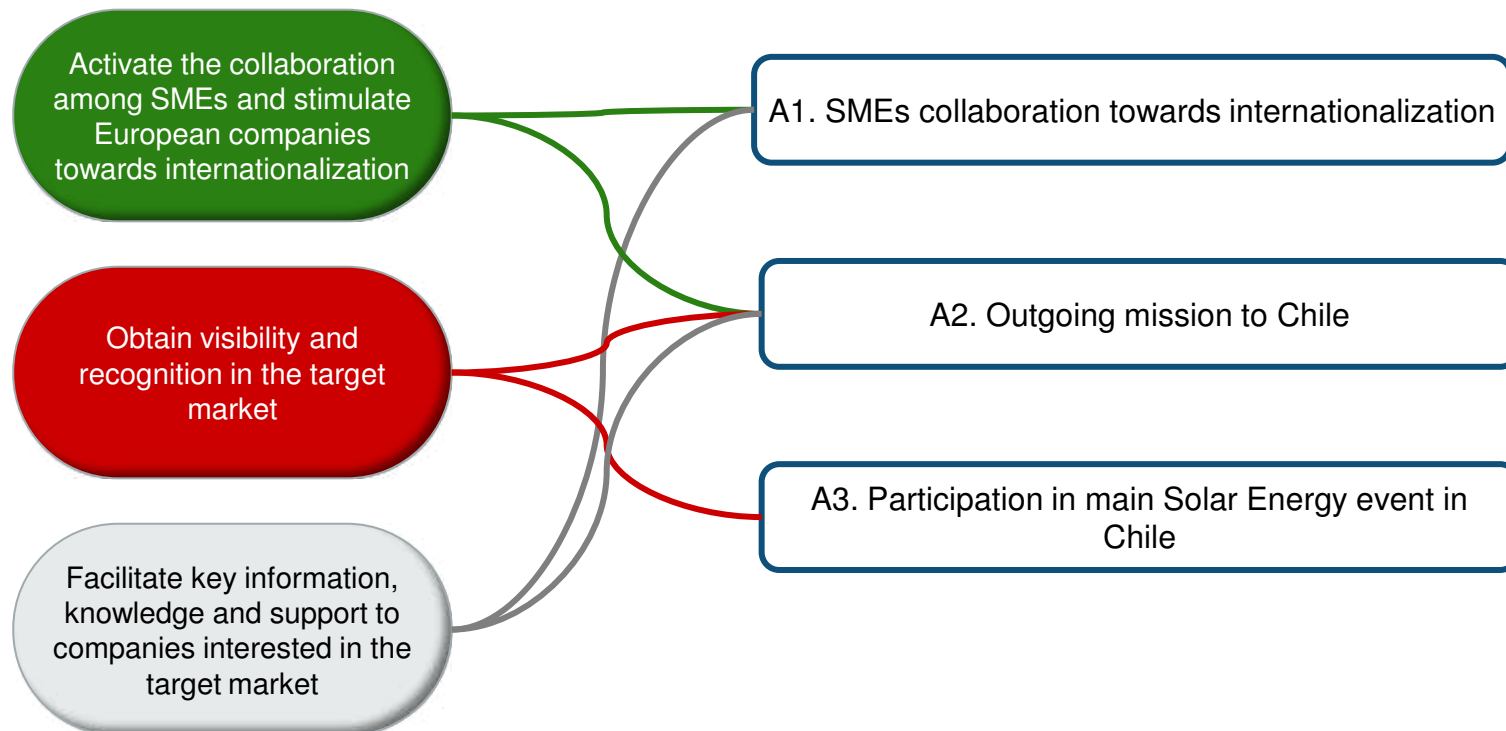


Introduction to the Action Plan

- The Action Plan included a set of initiatives, each of them contributing to one or more of the objectives pursued.
- The scope of this Action Plan could be larger than REINA project, both in terms of resources needed and of time schedule (the cluster efforts in this line will probably go beyond the period covered by REINA)

Objectives

Actions



Action 1: SMEs collaboration towards internationalization

Action 1			
Title of the action SMEs collaboration towards internationalization			
Description of the action			
<ul style="list-style-type: none"> • Collaboration is considered as an important way to access successfully foreign markets. • In order to stimulate collaboration among companies, different meetings are arrange in which companies can suggest and define their interest, strategies, needs, ... in the target market. • This action tries to identify and promote collaboration opportunities among SMEs that helps them to begin or/and advance in their internationalization processes. 			
Objectives / expected results	Intercluster collaboration	Resouces needed	Timing and Results
<p>Obtain company involvement in REINA project and its next actions.</p> <p>Create a sort of networking among companies to solve doubts and to get advice in internationalization issues.</p> <p>Possible mission to target market.</p>	<p>Collaboration in sharing key contacts to be included in further actions</p>	<p>Organisation of workshops with SMEs.</p>	<p>1st session June 2013</p> <p>2nd session October 2013</p> <p>Nº of companies: 7</p>

Action 2-3: Outgoing mission + Event in Chile

Action 2	Action 3			
<p>Title of the action Outgoing mission + Participation in main Solar Energy event in Chile</p>				
<p>Description of the action</p> <p>Due to the participation of Energy Cluster companies in the Learning Seminar organized by OEKOENERGIE CLUSTER, and the real potential of the Solar Power (CSP) Market in Chile showed in the market report, an outgoing mission to Chile was planned in July. In total, 8 companies from the Basque Country joined the mission. “CSP Today LATAM 2013” was identified as the most important event in Chile. The event brought together key players and high value speakers able to transmit the current situation of the country in terms of Solar Thermal Energy.</p> <p>Energy Cluster and its companies were able to collect information about the business opportunities, needs in the solar power value chain, administrative and other legal aspects. Firsthand information for the companies to contrast with their capabilities and possibilities of internationalization in Chile.</p>				
<p>Objectives / expected results</p> <p>Obtain visibility.</p> <p>Facilitate contacts and networking among companies interested in the Chilean market.</p> <p>Get first-hand information about the last tenders in Chile.</p> <p>Promote cluster companies of solar energy value chain.</p>		<p>Intercluster collaboration</p> <p>Interest began with the Learning Seminar “Chile-Export Market for renewable energy” organized by OEKOENERGIE.</p> <p>Information and contacts exchange.</p>		<p>Resources needed</p> <p>Gathering of the information from companies.</p> <p>Agenda with key contacts of the Chilean Solar market.</p> <p>Travel and subsistence expenses of REINA members</p>
				<p>Timing</p> <p>July 2013</p>

Action 2-3: Outgoing mission + Event in Chile

Action 2	Action 3				
Title of the action Outgoing mission + Participation in main Solar Energy event in Chile					
Meeting Agenda					
<u>Day 1</u> <ul style="list-style-type: none"> • Meeting with the Basque Government Delegation in Chile – Mr. Alberto Fernández • Renewable Energy Center (CER) – Mr. Daniel Almarza and Mrs. Katherine Navarrete. • Talleres Lucas – Mr. Francisco Dittborn, Mr. Francisco Dittborn Jr. and Mr. Javier Izquierdo. 		<u>Day 2</u> <p>CSP TODAY LATAM CONGRES</p> <ul style="list-style-type: none"> • Educational Group TEC – Mr. Cristobal Silva. • Antofagasta University – Mr. Edward Fuentealba and Mr. Diego Pulido. • Renewable Energy Associaton (ACERA) – Mr. Carlos Finat 		<u>Day 3</u> <p>CSP TODAY LATAM CONGRES</p> <ul style="list-style-type: none"> • 3M – Mr. Alejandro Forner and Carlos Portillo. • Antogasta Industry Association – Mr. Raúl Paredes. 	

Participation of CEPV Companies in other markets Action Plans:

