Deepbloo

PANORAMA DEEPBLOO · PUBLIC TENDERS

Europe

Public tenders for electricity grids

Calls for tender published in TED, the official journal of EU public procurement · 1 July to 15 November 2026

Published in November 2026
© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Introduction

Europe's electricity grids are entering a decade of heavy investment. Transmission operators must connect new renewable capacity, reinforce interconnections and replace equipment installed in the 1980s and 1990s, while distribution operators adapt ageing networks to heat pumps, electric vehicles and local generation. Much of this work goes through public procurement.

This Panorama analyses the calls for tender for electricity transmission and distribution grids published in TED, the European Union's official journal of public procurement, between 1 July and 15 November 2026. Contracts above the EU thresholds must be advertised in TED: for grid operators, EUR 432,000 for supplies and services and EUR 5,404,000 for works. Some buyers also publish smaller contracts there. The report therefore describes mainly the larger contracts of grid operators in 32 countries: what they buy, who buys, who wins, and on what terms.

Each of the 848 consultations was read and classified one by one. Award notices published over the same period are analysed separately, to identify the companies that win grid contracts.

Key facts

- Scope: calls for tender published in TED (Tenders Electronic Daily), the EU's official journal of public procurement, where contracts above the EU thresholds must be advertised. *Source: Directives 2014/24/EU and 2014/25/EU*
- Thresholds from 1 January 2026 for grid operators (utilities): EUR 432,000 for supplies and services, EUR 5,404,000 for works. *Source: Delegated Regulation (EU) 2025/2150*
- Investment needed in EU electricity grids: EUR 584 billion by 2030 and EUR 1.2 trillion by 2040, of which EUR 730 billion for distribution. *Source: European Commission, EU Action Plan for Grids 2023 and European Grids Package 2025*
- About 40% of Europe's distribution grids are over 40 years old. *Source: European Commission, EU Action Plan for Grids, 2023*
- European TSOs plan 2,820 new power transformers and 119 new HVDC converter stations by 2035, with a peak of additions between 2028 and 2032. *Source: ENTSO-E, Transmission Grid Investment and Supply Chain Assessment Report 2026*

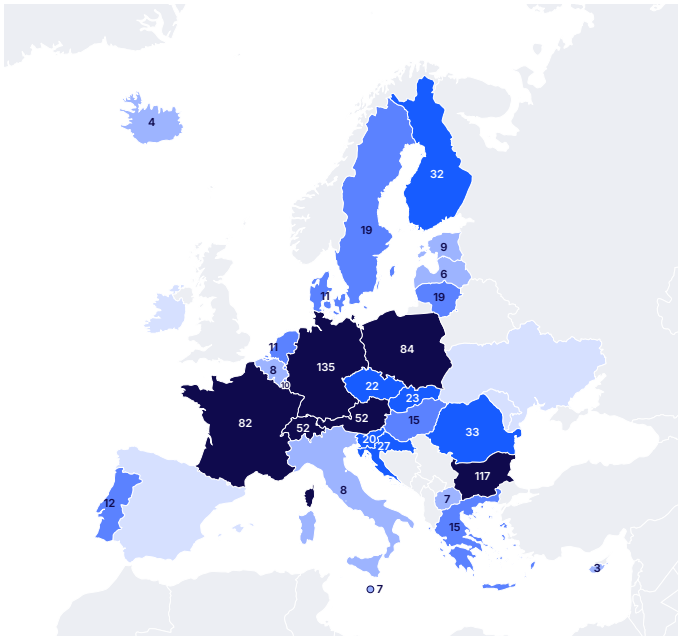
Main finding: grid purchasing published in TED is led by switchgear and protection (19.3%), overhead lines (14.5%) and substations (14.2%), and supplies are the most frequent contract type (48.9%). Transmission system operators publish more than one consultation in four (27.6%). One notice can cover several years of purchases: at least 231 consultations (27.2%) are framework agreements, qualification systems or dynamic purchasing systems.

© 2026 Deepbloo. Reproduction permitted with attribution.

REGIONAL PROFILE

Europe at a glance

SCOPE OF THIS PANORAMA	
Area covered	32 countries with grid consultations in TED
Source	TED, Official Journal of the EU, supplement S
Period	1 July to 15 November 2026
Thresholds 2026 (utilities)	EUR 432,000 supplies and services; EUR 5,404,000 works
Thresholds 2026 (public authorities)	EUR 140,000 or 216,000 supplies and services; EUR 5,404,000 works
Transmission operators	40 TSOs in 36 countries are members of ENTSO-E
Network length (EU)	Over 11 million km (EU Action Plan for Grids, 2023)
Distribution grids	About 40% over 40 years old



Map: grid consultations published in TED by country, 1 July to 15 November 2026. Borders: Natural Earth.

European grids in figures

GRID INVESTMENT
EUR 584bn
NEEDED IN THE EU BY 2030

DISTRIBUTION GRIDS
EUR 730bn
INVESTMENT NEEDED BY 2040

HVDC CONVERTER STATIONS
119
PLANNED BY TSOS BY 2035

ELECTRICITY
about 23%
SHARE OF FINAL ENERGY TODAY

Sources: Delegated Regulations (EU) 2025/2150 and 2025/2152; ENTSO-E; European Commission (Action Plan for Grids 2023, European Grids Package 2025, Electrification Action Plan 2026). Details in appendix E.

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Market context

The figures in this Panorama should be read against the investment programmes of European grid operators. The reference points below come from public sources listed in appendix E. They are not drawn from Deepbloo data.

GRID INVESTMENT NEEDED
EUR 1.2 trillion
IN THE EU BY 2040

NEW POWER TRANSFORMERS
2,820
PLANNED BY TSOS BY 2035

ELECTRIFICATION TARGET
46%
SHARE OF ELECTRICITY IN FINAL ENERGY, 2040

A decade of grid build-out

The European Grids Package of December 2025 estimates that EUR 1.2 trillion of investment is needed in EU electricity grids by 2040, of which EUR 730 billion for distribution. The 2023 Action Plan for Grids already put the need at EUR 584 billion by 2030 and noted that about 40% of distribution grids are over 40 years old.

Supply chains under pressure

ENTSO-E's report of 3 November 2026 lists the equipment European TSOs plan to add by 2035: about 34,000 km of HVDC cable, 119 new HVDC converter stations (38 today), 2,820 power transformers on top of a fleet of 5,649, and 4,238 SF6-free gas-insulated switchgear bays. Additions peak between 2028 and 2032 in almost every category, and ENTSO-E notes that manufacturers need long-term demand signals before investing in new capacity.

Electrification and connections

The Electrification Action Plan adopted on 17 July 2026 sets an indicative target of 46% of electricity in final energy consumption by 2040, against about 23% today, and relies on faster grid deployment. In September 2026, ENTSO-E noted that more than half of the transmission projects needed by 2030 were still awaiting permits.

The end of SF6 in new switchgear

Article 13 of Regulation (EU) 2024/573 prohibits putting into operation new switchgear relying on F-gases: medium voltage up to 24 kV from 1 January 2026, 52 to 145 kV from 2028, 24 to 52 kV from 2030 and above 145 kV from 2032. Derogations apply, in particular when a tender receives too few suitable bids. Some grid operators already ask for SF6-free switchgear in their calls for tender (section 09).

© 2026 Deepbloo. Reproduction permitted with attribution.

01

SECTION 01

Key figures

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Key figures

848
calls for tender for electricity grids published in TED

32
countries with at least one consultation

27.6%
published by transmission system operators

48.9%
supplies, the most frequent contract type

33 days
median time to respond

1,753
award notices for grid contracts over the same period

Key findings

- 848 consultations for electricity grids were published in TED between 1 July and 15 November 2026, about 64 for every 10,000 calls for tender of all sectors.
- Switchgear and protection (164), overhead lines (123) and substations (120) come first, ahead of metering and grid digital systems (106) and engineering and studies (104).
- Transmission system operators published 234 consultations (27.6%) in 25 countries; distribution operators and municipal utilities 593 (69.9%).
- Germany (135), Bulgaria (117), Poland (84) and France (82) account for 49.3% of consultations. Spain has a single grid call for tender in TED over the period, but 27 award procedures, 16 of them from Red Electrica.
- The number of grid consultations rose by 21.5% from July and August combined (331) to September and October combined (402), while all TED calls for tender rose by 8.2%.
- At least 231 consultations (27.2%) are framework agreements (176) or qualification and dynamic purchasing systems (55), which can cover several years of purchases.

Cite this Panorama

"Source: Deepbloo, Panorama of public tenders for electricity grids in Europe, calls for tender published in TED, 1 July to 15 November 2026 (November 2026)."

The figures in this Panorama may be reused freely, provided the source is cited in this form.

© 2026 Deepbloo. Reproduction permitted with attribution.

02

SECTION 02

Methodology

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Methodology

Scope

This Panorama covers the calls for tender for electricity transmission and distribution grids published in TED between 1 July and 15 November 2026: substations, transformers, switchgear and protection, overhead lines, cables, metering and grid digital systems, network works and maintenance, and the related engineering. Contracts above the EU thresholds must be advertised in TED, and some buyers also publish smaller contracts there; the report therefore describes mainly the larger contracts of grid operators and public buyers in the EU, the European Economic Area and the other countries that publish in TED. Purchases of electricity, power plants, railway power supply, and the internal electrical installations of buildings are outside the scope.

Selection of consultations

Notices were first identified from their title and the titles of their lots, with a list of terms in English, French, German, Czech and Polish (appendix A), and through the names of the main French and Belgian grid operators. As some titles are published in TED in their original language only, every call for tender of the grid buyers found in this way was then listed and checked as well. The type of every notice was then checked in TED: direct-award notices, market consultations, prior information notices that were not calls for competition, and changes to calls published before July were removed. Each candidate was read one by one, with its description when needed, and kept only if its object is the electricity network itself. Off-topic notices were removed: purchases of electricity, building installations, district heating, railway traction, vehicles, homonyms (such as 'kv.', a city block in Bulgarian addresses) and services unrelated to the network bought for grid sites (guarding, cleaning, building repairs). High-voltage substations of 110 kV and above built for large consumers (industrial sites, ports, airports) are included, as they are part of the high-voltage network.

Counting rules

- The unit is the consultation: a procedure counted once, whatever the number of notices (corrections, republications) published for it.
- A consultation republished under another reference before its deadline counts once; a relaunch published after the deadline counts as a new consultation.
- Each lot published as a separate procedure counts as one consultation.
- Award notices, cancellations and corrections are not consultations. Award notices are analysed separately, in section 06.
- Each consultation is attached to a single family of needs, the most specific one, in a fixed order of priority (appendix B).
- Each consultation is attached to the month of its first publication in TED.

Classification

Each consultation is attached to one of eight families of needs. Buyers are grouped by organisation (for example the regional units of the Bulgarian transmission operator ESO) and classified as transmission system operator, distribution operator or municipal utility, industrial site, port, airport or plant (for their high-voltage substations), or other buyer (public bodies, an interconnector developer).

© 2026 Deepbloo. Reproduction permitted with attribution.

Changes over time

Changes over time are compared with all calls for tender published in TED over the same months (132,337 procedures). Deepbloo also collects the national portals of European countries, where most below-threshold tenders are published, but the number of these sources grew strongly in 2026; this edition is therefore limited to TED, whose coverage is stable.

Sources covered

- TED (Tenders Electronic Daily), all notices published between 1 July and 15 November 2026: calls for tender, qualification systems and dynamic purchasing systems, and award notices.
- 32 countries are represented: the 27 EU member states, Iceland, Moldova, North Macedonia, Switzerland and Ukraine.

Scope and limitations of this edition

Contracts below EU thresholds	Smaller contracts published only on national or regional portals are not covered. Some buyers also publish smaller contracts in TED: 49 of the 113 consultations that give an estimated value are below the utilities threshold for their contract type, 38 of them in Bulgaria.
Qualification systems and frameworks	Grid operators can buy through qualification systems, dynamic purchasing systems and multi-year framework agreements: one notice in TED may cover several years of purchases, and the contracts placed under it are not new consultations. The number of consultations therefore understates the activity of the operators that buy this way. These arrangements were identified from the text of the notices; as not every notice says so, their count is a minimum.
Spain	Spain has a single grid call for tender in TED over the period, but 27 award procedures, 16 of them from Red Electrica. Its figure in sections 03 to 05 does not reflect the size of its grid programmes.
Amounts	Estimated values are given for 13.3% of consultations only. The report gives no market size, only medians and bands.
Period	Four and a half months, from 1 July to 15 November 2026. Comparisons between periods are made with all TED calls for tender; the period is too short to separate a trend from a seasonal effect.
Country comparisons	Country figures reflect how buyers publish (qualification systems, multi-year frameworks, smaller contracts on national portals) and the coverage of the search. They are not a ranking of national grid investment.

© 2026 Deepbloo. Reproduction permitted with attribution.

Cross-check against public sources

The main findings were compared with public information on European grids and procurement rules. References are listed in appendix E.

REPORT FINDING	WHAT PUBLIC SOURCES SAY	ASSESSMENT
Switchgear, substations and lines lead	ENTSO-E plans thousands of switchgear bays, 2,820 transformers and over 64,000 km of high-temperature low-sag conductors by 2035.	Consistent
Several years of purchases in one notice	The utilities directive allows qualification systems and framework agreements; RTE publishes the list of its qualification systems (protection, surge arresters, HV cables, works, studies).	Consistent
SF6-free switchgear requested	Putting new F-gas switchgear into operation is banned up to 24 kV since 2026, 52 to 145 kV from 2028, with derogations.	Consistent
Few calls in Spain	16 award procedures have Red Electrica as lead buyer, but Spain has a single grid call for tender in TED over the period.	Limit stated in section 02

© 2026 Deepbloo. Reproduction permitted with attribution.

03

SECTION 03

Market dynamics

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Market dynamics

Over the four and a half months, 848 grid consultations were published in TED, an average of about 188 a month. October was the busiest month (232), ahead of July (199); September and August were quieter (170 and 132). The first half of November (115) is in line with October.

Grid consultations represent 64.1 of every 10,000 calls for tender published in TED over the period. From July and August combined (331) to September and October combined (402), their number changed by +21.5%, while all TED calls for tender rose by 8.2%. The period is too short to separate a trend from a seasonal effect: August was the quietest full month. These figures count consultations, not amounts: a multi-year framework agreement weighs the same as a single supply contract.

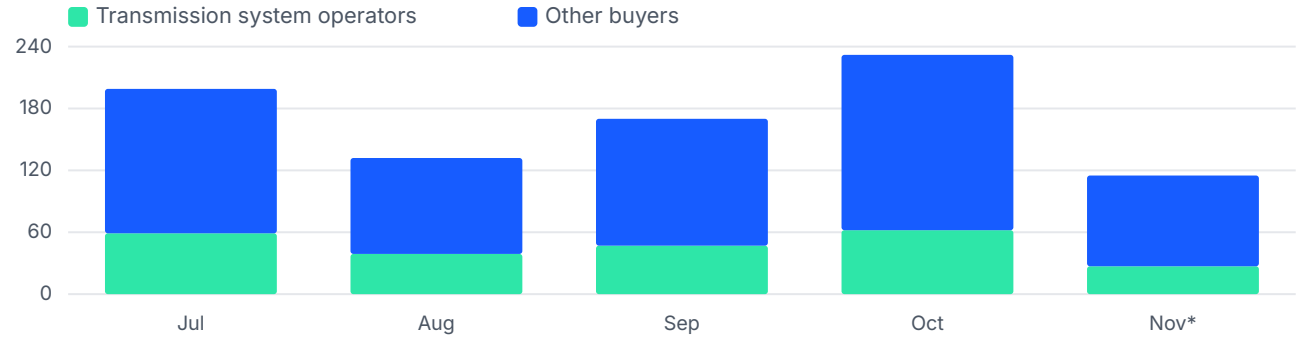


Figure 1: Grid consultations published in TED each month, 2026 (November: 1 to 15)

Comparison with all calls for tender published in TED

MEASURE	JUL. AND AUG. 2026	SEP. AND OCT. 2026	CHANGE
Grid consultations	331	402	+21.5%
All TED calls for tender (procedures)	55,905	60,480	+8.2%

Consultations by month

MONTH	GRID CONSULTATIONS	OF WHICH TSOS	ALL TED CALLS FOR TENDER	GRID CONSULTATIONS PER 10,000
July 2026	199	59	30,589	65.1
August 2026	132	39	25,316	52.1
September 2026	170	47	27,061	62.8
October 2026	232	62	33,419	69.4
1 to 15 November 2026	115	27	15,952	72.1
Total	**848**	**234**	**132,337**	**64.1**

Each consultation is attached to the month of its first publication in TED. *November: 1 to 15 November only. All TED calls for tender: distinct procedures with at least one call for tender published in the month, all sectors; this total may include some change notices (without them, the increase is 8.6% on the TED search service).

© 2026 Deepbloo. Reproduction permitted with attribution.

04

SECTION 04

Geographic breakdown

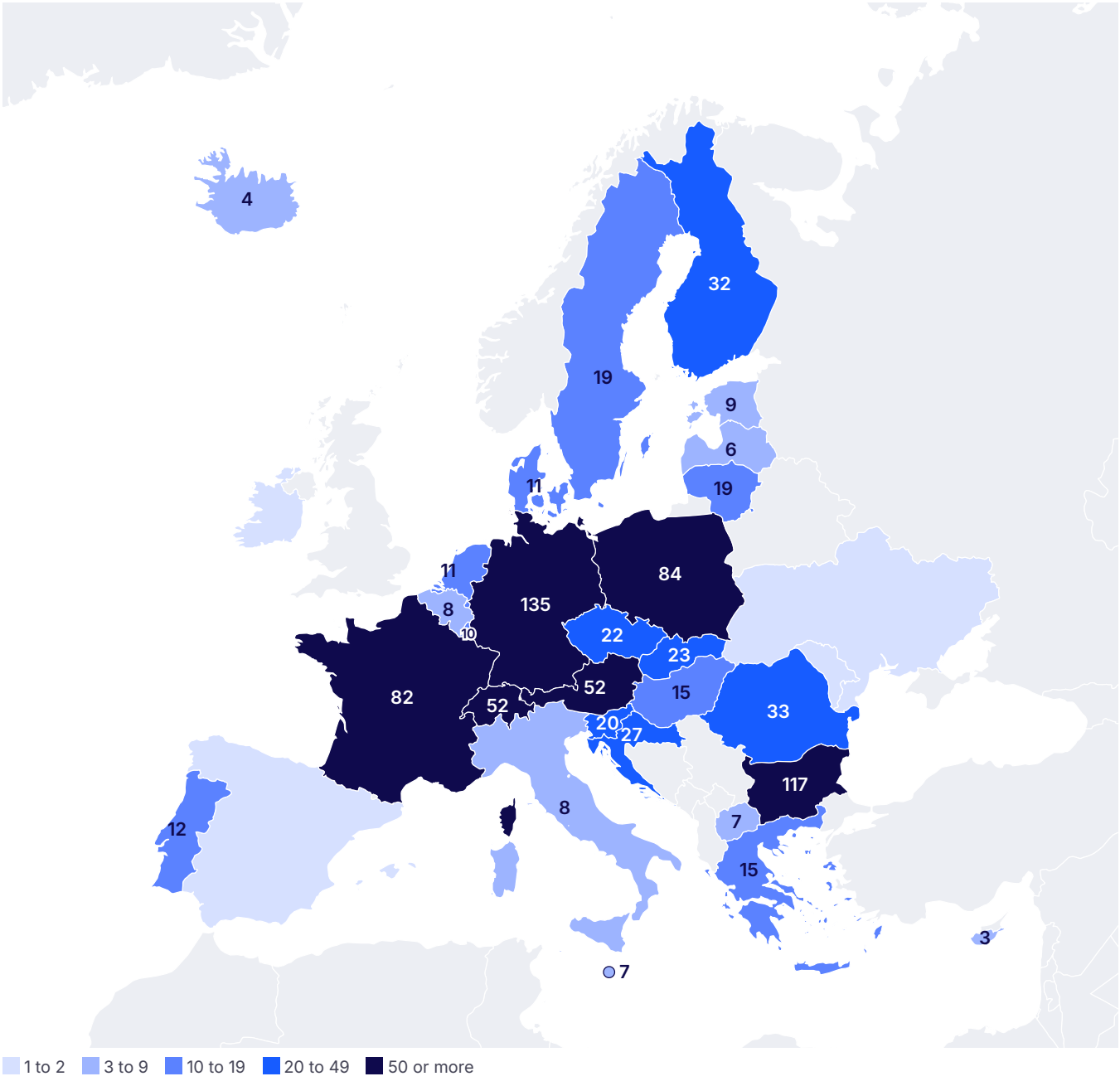
© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Geographic breakdown

Four countries account for 49.3% of the consultations: Germany (135), Bulgaria (117), Poland (84) and France (82). Switzerland and Austria follow with 52 each, then Romania (33) and Finland (32).

Country figures reflect how buyers publish and the coverage of the search; they are not a ranking of national grid investment. Bulgaria's transmission operator ESO publishes 56 of the 117 Bulgarian consultations, 42 of them maintenance contracts such as vegetation clearing along lines and anti-corrosion coating of towers. In France, Enedis publishes large multi-year framework agreements in TED, such as its national frameworks for primary substations. Spain has a single grid call for tender in TED over the period, while 16 award procedures have Red Electrica as lead buyer (section 06).



Grid consultations by country, 1 July to 15 November 2026

© 2026 Deepbloo. Reproduction permitted with attribution.

Consultations by country

COUNTRY	CONSULTATIONS	SHARE	OF WHICH TSOS	MOST FREQUENT NEED
Germany	135	15.9%	30	Switchgear and protection
Bulgaria	117	13.8%	56	Overhead lines
Poland	84	9.9%	18	Substations
France	82	9.7%	17	Engineering and studies
Switzerland	52	6.1%	17	Switchgear and protection
Austria	52	6.1%	11	Switchgear and protection
Romania	33	3.9%	7	Switchgear and protection / Metering and digital
Finland	32	3.8%	7	Transformers and reactors
Croatia	27	3.2%	10	Transformers and reactors
Slovakia	23	2.7%	9	Engineering and studies
Czechia	22	2.6%	7	Transformers and reactors
Slovenia	20	2.4%	6	Switchgear and protection
Lithuania	19	2.2%	6	Substations / Transformers and reactors
Sweden	19	2.2%	0	Substations
Other countries (Hungary, Greece, Portugal, Netherlands, Denmark, Luxembourg, Estonia, Italy, Belgium, North Macedonia, Malta, Latvia, Iceland, Cyprus, Moldova, Ireland, Ukraine, Spain)	131	15.4%	33	

© 2026 Deepbloo. Reproduction permitted with attribution.

05

SECTION 05

Buyers

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Buyers

211 different buyers published at least one consultation. The ten most active account for 30.7% of the total. Bulgaria's transmission operator ESO comes first (56 consultations, 40 of them on overhead lines, mostly maintenance), ahead of Enedis (39), Elektrorazpredelenie Yug in Bulgaria (37), PGE Dystrybucja (27) and PSE in Poland (18).

Transmission system operators published 234 consultations (27.6%) in 25 countries. They publish 64 of the 123 overhead line consultations, 40 of them by Bulgaria's ESO, mostly maintenance, but only 38 of the 120 substation consultations. Distribution operators and municipal utilities (593 consultations, 69.9%) lead in switchgear, metering and network works.

TYPE OF BUYER	CONSULTATIONS	SHARE
Distribution operators, municipal utilities and local network authorities	593	69.9%
Transmission system operators	234	27.6%
Industrial sites, ports, airports and plants (HV substations)	11	1.3%
Other buyers (public bodies, interconnector developer)	10	1.2%

© 2026 Deepbloo. Reproduction permitted with attribution.

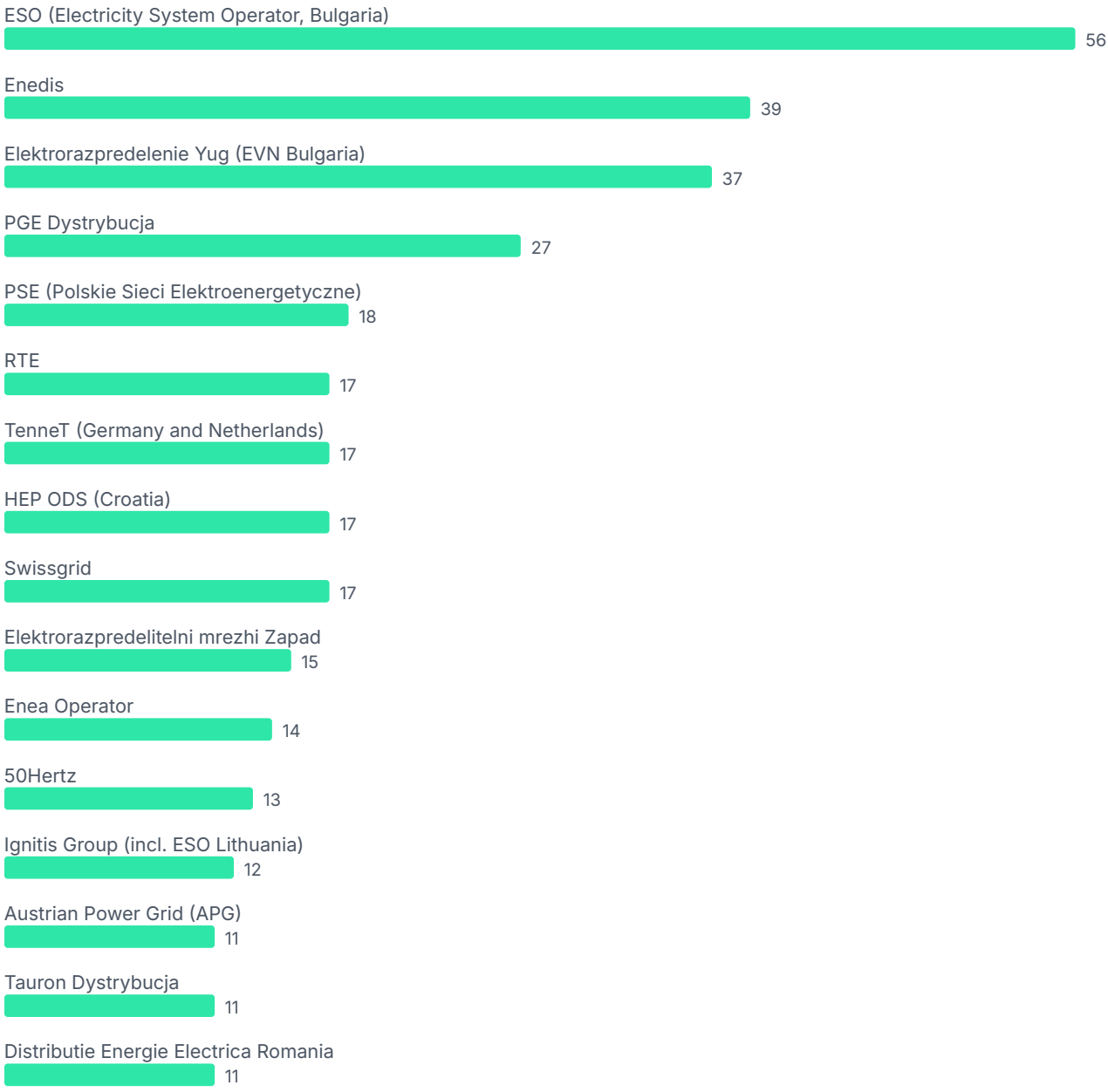


Figure 2: Most active buyers (consultations)

© 2026 Deepbloo. Reproduction permitted with attribution.

Buyers with the most consultations

RANK	BUYER	COUNTRY	TYPE	CONSULTATIONS
1	ESO (Electricity System Operator, Bulgaria)	Bulgaria	TSO	56
2	Enedis	France	Distribution	39
3	Elektrorazpredelenie Yug (EVN Bulgaria)	Bulgaria	Distribution	37
4	PGE Dystrybucja	Poland	Distribution	27
5	PSE (Polskie Sieci Elektroenergetyczne)	Poland	TSO	18
6	RTE	France	TSO	17
6	TenneT (Germany and Netherlands)	Germany, Netherlands	TSO	17
6	HEP ODS (Croatia)	Croatia	Distribution	17
6	Swissgrid	Switzerland	TSO	17
10	Elektrorazpredelitelni mrezhi Zapad	Bulgaria	Distribution	15
11	Enea Operator	Poland	Distribution	14
12	50Hertz	Germany	TSO	13
13	Ignitis Group (incl. ESO Lithuania)	Lithuania	Distribution	12
14	Austrian Power Grid (APG)	Austria	TSO	11
14	Tauron Dystrybucja	Poland	Distribution	11
14	Distributie Energie Electrica Romania	Romania	Distribution	11
17	HOPS (Croatia)	Croatia	TSO	10
17	Creos Luxembourg	Luxembourg	Distribution	10
19	SEPS (Slovakia)	Slovakia	TSO	9
19	SWM (Munich utilities)	Germany	Distribution	9
19	Elektrorazpredelenie Sever (Energo-Pro)	Bulgaria	Distribution	9
19	Thüga	Germany	Distribution	9

> Buyers grouped by organisation: regional units and different spellings of the same operator are counted together (ESO's regional grid districts in Bulgaria; Enedis regional directorates; TenneT's German and Dutch companies). Appeal bodies and publication platforms named in some notices are not counted as buyers. Buyers with the same number of consultations share the same rank.

© 2026 Deepbloo. Reproduction permitted with attribution.

06

SECTION 06

Awards

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Awards

Over the same period, 1,753 award notices for grid contracts were published in TED, for 1,485 procedures. Many relate to consultations launched before July 2026, so these figures describe the contracts awarded during the period, not the outcome of the consultations counted in the previous sections.

1,332 of these 1,485 procedures (89.7%) name at least one winner. The largest numbers come from Czechia (296 procedures), Bulgaria (198), Croatia (136) and Romania (116). The country mix differs from that of calls for tender: in Czechia, ČEZ Distribuce and EG.D published 216 award notices for 197 procedures, against 22 grid calls for tender in the whole country, so most of these procedures have no call for tender in TED during the period; in Spain, Red Electrica is the lead buyer in 16 award procedures, against a single grid call for tender in the country.

AWARD NOTICES
1,753
FOR 1,485 PROCEDURES

NAME A WINNER
89.7%
SHARE OF PROCEDURES

MEDIAN AMOUNT
EUR 1.0m
ON 1,023 NOTICES WITH AN AMOUNT

Award notices by need

NEED	PROCEDURES WITH AN AWARD NOTICE
Switchgear, protection and control	267
Overhead lines	265
Metering and grid digital systems	202
Engineering, studies and supervision	180
Substations and converter stations	160
Distribution network works and maintenance	148
Cables	141
Transformers and reactors	122

© 2026 Deepbloo. Reproduction permitted with attribution.

Most frequent winners (subsidiaries grouped)

RANK	GROUP	HEAD OFFICE	ACTIVITY	PROCEDURES WON	BUYER COUNTRIES
1	Hitachi Energy	Switzerland (parent: Hitachi, Japan)	Equipment manufacturer	34	14
2	VINCI (Omexom, EnergoBit, Cobra IS, Eurovia, Sixense)	France	EPC and grid contractor	33	5
3	Končar (incl. Dalekovod)	Croatia	Equipment manufacturer	31	7
4	Siemens	Germany	Equipment manufacturer	24	8
5	DRIBO, spol. s r.o.	Czechia	Equipment manufacturer	21	2
6	Adrem Group	Romania	EPC and grid contractor	17	1
6	Schneider Electric	France	Equipment manufacturer	17	8
8	Siemens Energy	Germany	Equipment manufacturer	16	11
9	SPIE	France	EPC and grid contractor	14	6
10	ABB	Switzerland	Equipment manufacturer	13	7
11	MSEM, a.s.	Czechia	EPC and grid contractor	12	1
11	Brodomerkur Energetika d.o.o.	Croatia	Distributor and wholesaler	12	1
11	KAMAT spol. s r.o.	Czechia	Distributor and wholesaler	12	1

Two companies follow with 11 procedures each: GE Vernova and Venera d.o.o.

Procedures won, counted once per group even when several subsidiaries of the same group won lots of the same procedure. Subsidiaries are grouped under their parent group (for example Omexom, EnergoBit and Cobra IS under VINCI; Dalekovod under Končar; Equans INEO under Bouygues). A winner is counted when the notice names it as the awardee of at least one lot; some notices list all bidders, and these lists were checked against the lot results. Subsidiaries often appear in award notices under their local name, so most winners are registered in the buyer's country. The ranking counts procedures, not amounts: it is not a market share.

© 2026 Deepbloo. Reproduction permitted with attribution.

Amounts awarded

1,023 award notices (58.4%) give an awarded amount. The median is EUR 1.0 million. Framework agreements often state a maximum value over several years, so the high band mixes single contracts and multi-year ceilings.

AMOUNT AWARDED PER NOTICE	NOTICES	SHARE
Under EUR 0.5 million	392	38.3%
EUR 0.5 to 2 million	252	24.6%
EUR 2 to 10 million	236	23.1%
EUR 10 million or more	143	14.0%

> 125 award notices published during the period report award dates before 2026 (54 of them in Romania): they are counted, as published notices of the period. Amounts are those stated in the notices, converted to euros.

© 2026 Deepbloo. Reproduction permitted with attribution.

07

SECTION 07

Typology of needs

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Typology of needs

Switchgear and protection come first (164 consultations, 19.3%), ahead of overhead lines (123, 14.5%) and substations (120, 14.2%). Metering and grid digital systems (106), engineering and studies (104), cables (93), transformers and reactors (90) and distribution network works (48) follow. Each consultation is counted in one family only, the most specific one (appendix B).

The four equipment families (switchgear, transformers, cables, metering) account for 53.4% of consultations, and supplies are the most frequent contract type (48.9%). Works are concentrated in substations, overhead lines, network works and cables.

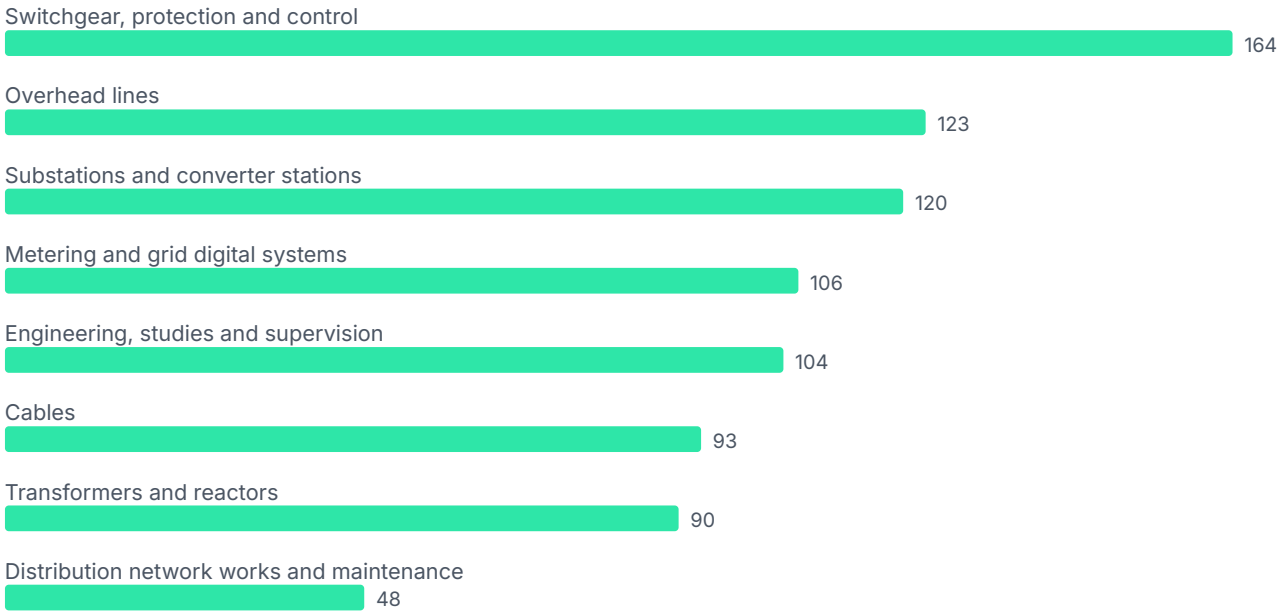


Figure 3: Consultations by family of needs

FAMILY OF NEEDS	CONSULTATIONS	SHARE	JUL. AND AUG.	SEP. AND OCT.	OF WHICH TSOS
Switchgear, protection and control	164	19.3%	78	63	45
Overhead lines	123	14.5%	50	47	64
Substations and converter stations	120	14.2%	39	67	38
Metering and grid digital systems	106	12.5%	47	44	22
Engineering, studies and supervision	104	12.3%	41	49	33
Cables	93	11.0%	30	51	11
Transformers and reactors	90	10.6%	31	53	21
Distribution network works and maintenance	48	5.7%	15	28	0

© 2026 Deepbloo. Reproduction permitted with attribution.

Notable projects put out to tender (selection)

A selection of consultations at 220 kV and above, interconnectors, and large frameworks, drawn from the corpus. Titles are summarised in English.

COUNTRY	BUYER	SUBJECT
Ireland	MaresConnect	750 MW HVDC interconnector between Ireland and Great Britain (320 kV): converter stations, 400 kV substation and cables
Poland	PSE	220 kV cable systems from Elk Bis to the Lithuanian border, Harmony Link interconnector
Lithuania	Litgrid	Design and construction of the 330/220/110 kV Gizai substation for the Harmony Link interconnector
Poland	PSE	Construction of the 400 kV Krzemienica substation, stage I
Denmark	Energinet and 50Hertz	Horizontal drilling for the landfall of the Bornholm Energy Island HVDC cables
Germany	50Hertz	38 km 380 kV overhead line from Bentwisch to Guestrow
Germany	TransnetBW	General contractor for 380 kV gas-insulated switchgear to connect battery storage systems
France	Enedis	National framework agreements for civil works (15 lots) and electrical works (16 lots) in primary substations
France	RTE	Drilling for three 225 kV underground links from Clape to Mefioules, near Narbonne
Poland	PSE	New double-circuit 400 kV overhead line from Gdansk Blonia to Olsztyn Matki
Germany	50Hertz	Framework agreement for steel lattice towers, 2027 to 2033
Slovenia	ELES	Third phase-shifting transformer unit at Divaca substation
Finland	Fingrid	Civil works for the Hirvisuo and Arkkukallio synchronous compensator plants
Croatia	HOPS	Equipment to revitalise the 220 kV interconnection line Pehlin to Divaca (Croatia and Slovenia)
Finland	Helen	400 kV, 400 MVA power transformer and 63 MVAr variable shunt reactor
Germany	TenneT	Maintenance of process systems on offshore HVDC converter platforms (10 lots)

© 2026 Deepbloo. Reproduction permitted with attribution.

08

SECTION 08

Tender conditions

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Tender conditions

The median time given to companies between publication and deadline is 33 days. A quarter of consultations allow 28 days or less, and a quarter 39 days or more. In all, 32.6% allow less than 30 days. The median is 28 days for negotiated procedures with a call for competition and 36 days for open procedures.

Supplies are the most frequent contract type (415 of 848, 48.9%), ahead of works (230, 27.1%) and services (203, 23.9%). Where the procedure is recorded (601 consultations), open procedures lead (56.1%), ahead of negotiated procedures with a call for competition (40.6%), which grid operators may use freely under the utilities directive. 227 consultations (26.8%) are divided into several lots.

Contract types and procedures

CONTRACT TYPE	CONSULTATIONS	SHARE
Supplies	415	48.9%
Works	230	27.1%
Services	203	23.9%

PROCEDURE	CONSULTATIONS	SHARE
Open	337	56.1%
Negotiated with a call for competition	244	40.6%
Restricted	15	2.5%
Other	5	0.8%

Time to respond

TIME BETWEEN PUBLICATION AND DEADLINE	CONSULTATIONS	SHARE
under 30 days	256	32.6%
30 to 39 days	339	43.2%
40 to 59 days	138	17.6%
60 days or more	52	6.6%

Estimated values. 113 consultations (13.3%) publish an estimated value. Their median is EUR 1.0 million: 43 are under EUR 0.5 million, 24 between EUR 0.5 and 2 million, 23 between EUR 2 and 10 million and 23 at EUR 10 million or more, often multi-year frameworks. They describe only the consultations that publish a value.

Time to respond: 785 consultations with a deadline 7 to 365 days after publication; 25 with a later deadline (mostly qualification systems) and 9 under 7 days (stage deadlines or data errors) left out. Contract type known for 848 consultations, procedure for 601.

© 2026 Deepbloo. Reproduction permitted with attribution.

09

SECTION 09

Key trends

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Key trends

Supplies lead

Supplies are the most frequent contract type (48.9% of consultations), ahead of works (27.1%) and services (23.9%), and the four equipment families account for 53.4% of consultations. ENTSO-E's report of November 2026 expects equipment additions by European TSOs to peak between 2028 and 2032.

Long-term purchasing arrangements

At least 231 consultations (27.2%) are framework agreements (176) or qualification and dynamic purchasing systems (55), some of them running until 2035 or later. ENTSO-E notes that manufacturers need credible, long-term demand signals before investing in new production capacity.

SF6-free switchgear

At least seven consultations ask for SF6-free or fluorine-free switchgear in their title or summary (six in the title), including circuit breakers at 110 to 123 kV. Article 13 of Regulation (EU) 2024/573 prohibits putting into operation new switchgear relying on F-gases up to 24 kV since 1 January 2026, and from 52 to 145 kV from 1 January 2028, subject to derogations.

Interconnectors and offshore links

Several consultations concern cross-border links and offshore connections: the MaresConnect interconnector between Ireland and Great Britain, the Harmony Link between Poland and Lithuania, the 220 kV Pehlin to Divaca line between Croatia and Slovenia, the monitoring of the export cables of the Centre Manche 1 offshore connection in France, the maintenance of TenneT's offshore HVDC platforms and the landfall of the Bornholm Energy Island HVDC cables in Denmark.

Reactive power and grid stability

Shunt reactors, static var compensators, synchronous compensators and phase-shifting transformers appear in 11 consultations, in Finland, Croatia, Austria, Bulgaria, Slovakia, Hungary, France and Slovenia.

Maintenance of existing lines

Vegetation clearing, tower coating, inspections and repairs account for 64 of the 123 overhead line consultations. Bulgaria's ESO alone publishes 40 overhead line consultations, most of them maintenance.

© 2026 Deepbloo. Reproduction permitted with attribution.

EDITORIAL

Conclusion

Between July and mid-November 2026, 848 calls for tender for electricity grids were published in TED, in 32 countries. Switchgear and protection, overhead lines and substations come first, and supplies are the most frequent contract type (48.9%). Transmission operators publish 27.6% of the consultations, distribution operators and municipal utilities most of the rest.

The volume rose by 21.5% from July and August combined (331 consultations) to September and October combined (402), while TED as a whole grew by 8.2%. The number of consultations is only part of the picture: at least 231 of them are framework agreements, qualification systems or dynamic purchasing systems that can cover several years of purchases, and ENTSO-E expects equipment additions by European TSOs to peak between 2028 and 2032.

Award notices show a market where a few international groups win in many countries (Hitachi Energy in 14 buyer countries, Siemens Energy in 11, Prysmian in 9), alongside a large number of national contractors and distributors. Two technical subjects appear in the titles of the consultations: SF6-free switchgear, which EU law now requires for new medium-voltage switchgear up to 24 kV, with derogations, and equipment for grid stability, such as reactors, phase-shifting transformers and synchronous compensators.

Deepbloo will follow these consultations and their awards in the coming months, including below-threshold tenders published on national portals.

© 2026 Deepbloo. Reproduction permitted with attribution.

10

SECTION 10

Appendices

© 2026 Deepbloo. Reproduction permitted with attribution.

ELECTRICITY GRIDS · EUROPE

Appendices

A. Terms searched

A notice is a candidate when one of the terms below appears in its title or in a lot title. In the Deepbloo database, most TED titles are translated into English, but French-language titles, and some titles in other languages, are kept in their original language. French-language notices were searched with French terms and through the names of the French and Belgian grid operators (Enedis, RTE, SRD, ORES, RESA), and German, Czech and Polish terms were added. Every call for tender published in TED over the period by the grid buyers found in this way was then listed and checked one by one.

GROUP	TERMS SEARCHED
Substations	substation, switching station, switchyard, converter station, transformer station
Transformers and reactors	power transformer, distribution transformer, shunt reactor, phase shifting
Lines and cables	transmission line, overhead line, power line, line towers, pylons, underground cable, submarine cable, export cable, power cable, cable route, interconnector, HVDC
Voltage and networks	high voltage, extra high voltage, medium voltage, MV network, LV network, low voltage network or grid, transmission grid or network or system, distribution grid, electricity distribution, electricity network or grid, power grid, grid expansion, reinforcement or connection, kV
Switchgear and metering	switchgear, ring main unit, circuit breaker, gas-insulated, protection relays, smart meter, electricity meter
Terms added after review	disconnector, surge arrester, instrument, current, voltage or measuring transformer, LV, MV or HV cable, earthing switch, recloser, fault indicator, busbar, cable cabinets, transformer substation, compact or network station, distribution network, transmission or distribution system operator, voltages written without a space (such as 110kV), and German, Czech and Polish grid terms (Umspannwerk, Schaltanlage, Freileitung, Ortsnetzstation, rozvodna, transformovna, stacja elektroenergetyczna, GPZ, linia napowietrzna, rozdzielnica)
French terms	poste source, poste de transformation, poste électrique, poste HTA or HTB, transformateur de puissance, ligne électrique, ligne aérienne, liaison souterraine, câble HTA or HTB, haute tension, réseau électrique, réseau de distribution, distribution publique, cellules HTA, disjoncteur, compteur électrique, Linky, raccordement, pylône, élagage

Exclusion rules. Notices whose title mentions the supply or purchase of electricity or natural gas, railways, traction, catenary, trams or trolleybuses, street or public lighting, charging stations, power tools or Power BI are removed before review (in French: fourniture d'électricité, éclairage public, bornes de recharge, ferroviaire, tramway, chauffage urbain, eau potable, fibre optique). The review then removes the other off-topic notices described in section 02.

© 2026 Deepbloo. Reproduction permitted with attribution.

B. Families of needs

FAMILY	WHAT IT COVERS
Substations and converter stations	Construction, extension and modernisation of HV and MV substations, compact secondary substations, converter stations.
Transformers and reactors	Power and distribution transformers, shunt reactors, static var compensators, phase-shifting transformers, repairs.
Switchgear, protection and control	AIS and GIS switchgear, ring main units, circuit breakers, disconnectors, surge arresters, protection relays, substation control.
Overhead lines	Construction and rebuilding of lines, towers, conductors, insulators, vegetation clearing and line maintenance.
Cables	Underground and submarine cables, cable laying and accessories, interconnector cables.
Metering and grid digital systems	Electricity meters and smart metering, SCADA, grid telecom and monitoring.
Distribution network works and maintenance	Framework works on MV and LV networks, connections, repairs.
Engineering, studies and supervision	Design, owner's engineer, studies, permits, site supervision for grid projects.

C. Counting rules

- The unit is the consultation: a procedure counted once, whatever the number of notices (corrections, republications) published for it.
- A consultation republished under another reference before its deadline counts once; a relaunch published after the deadline counts as a new consultation.
- Each lot published as a separate procedure counts as one consultation.
- Award notices, cancellations and corrections are not consultations. Award notices are analysed separately, in section 06.
- Each consultation is attached to a single family of needs, the most specific one, in a fixed order of priority (appendix B).
- Each consultation is attached to the month of its first publication in TED.

D. Quality control

The selection was checked on a random sample of 100 consultations, classified again by a reviewer who had not seen the first classification: 98 of the 100 were confirmed as electricity grid consultations, and the two errors found, with one similar case found by searching the corpus, were removed. The type of every notice was then checked in TED: 85 consultations were removed (changes to calls published before July, direct-award notices, market consultations, prior information notices that were not calls for competition, and one call published after the period), and 10 change notices were attached to their original call. The 87 consultations of the sample that remain in the final corpus were all confirmed (95% confidence interval: 95.8% to 100%); the family of needs matched in

© 2026 Deepbloo. Reproduction permitted with attribution.

84 of them. Republications under different references were checked pair by pair before counting. Some TED notices group several calls under one record; they are counted once, so the total may be slightly understated.

E. Sources of the reference points and context

Public references used for the introduction, the regional profile and the "Market context" page (consulted in November 2026).

1. European Commission, Delegated Regulation (EU) 2025/2150, thresholds for the utilities directive, 2026-2027
   https://eur-lex.europa.eu/eli/reg_del/2025/2150/oj
2. European Commission, Delegated Regulation (EU) 2025/2152, thresholds for the public contracts directive, 2026-2027
   https://eur-lex.europa.eu/eli/reg_del/2025/2152/oj
3. ENTSO-E, Transmission Grid Investment and Supply Chain Assessment Report 2026, news release of 3 November 2026
   https://www.entsoe.eu/news/2026/11/03/entso-e-report-sets-out-europe-s-transmission-investment-needs-to-2035/
4. European Commission, European Grids Package, COM(2025) 1005, 10 December 2025
   https://energy.ec.europa.eu/topics/infrastructure/european-grids_en
5. European Commission, EU Action Plan for Grids, COM(2023) 757, 28 November 2023
   https://energy.ec.europa.eu/publications/eu-action-plan-grids_en
6. European Commission, Electrification Action Plan, COM(2026) 595, 17 July 2026
   https://commission.europa.eu/news-and-media/news/plan-make-europe-first-electro-continent-2026-07-17_en
7. ENTSO-E, position on the Electrification Action Plan, September 2026
   https://www.entsoe.eu/news/2026/09/15/delivering-on-the-electrification-action-plan-investment-in-grids-flexibility-and-faster-connections-will-drive-step-change/
8. Regulation (EU) 2024/573 on fluorinated greenhouse gases; Umweltbundesamt factsheet on switchgear, January 2026
   https://www.umweltbundesamt.de/system/files/document/Factsheet_Schaltanlagen.pdf
9. RTE, list of supplier qualification systems, December 2025
   https://assets.rte-france.com/prod/public/2025-12/2025-12-03-systemes-qualification.pdf
10. Directive 2014/25/EU on procurement by entities operating in the water, energy, transport and postal services sectors
    https://eur-lex.europa.eu/eli/dir/2014/25/oj

© 2026 Deepbloo. Reproduction permitted with attribution.

DEEPBLOO What is Deepbloo?

Deepbloo spots projects before they become tenders. The platform analyses the signals that precede a call for tender, such as buyers' published procurement plans, council resolutions, building permits, environmental authorisations and the decisions of public and private project owners, to flag the operations that will lead to a consultation, often several months in advance.

For example, the procurement plan that a state-owned company publishes at the start of its financial year announces the engineering, supply and works tenders it intends to launch in the following months.

Deepbloo also collects and structures the public tenders published in France and in more than 190 countries, from official portals, buyers' own websites and other publication sources. Notices are classified by sector, located and enriched using artificial intelligence, then sent to each user according to their criteria.

The Deepbloo Panoramas draw on this database to describe, sector by sector and country by country, the consultations published.

deepbloo.com

© 2026 Deepbloo. Reproduction permitted with attribution.