

Energy Transition: A multifaceted Challenge for Europe

Report of the series of events, Brussels, 2015

*Clémentine d'Oultremont, Senior Research Fellow, Egmont – Royal Institute for International Relations
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In partnership, **Egmont – Royal Institute for International Relations** and the **Development Group** organised a series of three Symposiums and a High Level Conference on the multifaceted challenge of the European Energy Transition towards a low carbon economy in Brussels in 2015. These events aimed at generating an intense debate, bringing together the views of the EU decision makers with those of the industry and other energy stakeholders from Brussels and beyond.

1st Symposium: “Securing Europe’s electricity supply – Making the switch towards an integrated and long-term approach”, 5 May 2015

Energy stakeholders and EU Member States have been increasingly concerned over the mid- to long-term security of the electricity system. The factors threatening the system are numerous and heterogeneous. Therefore, on the 5th of May 2015, around 100 representatives from EU institutions, the economic sector, member states and other key stakeholders discussed how to secure Europe’s electricity supply through an integrated and long-term new power system.



In his keynote address, **Dr Florian Ermacora** (Head of Unit: electricity and gas wholesale markets at the DG Energy, European Commission) reminded that although security of supply is perceived by many as a purely national issue, it is also a European concern. The Commission’s electricity market design initiative aims at facilitating the integration of an increasing share of renewables into the electricity

system, managing the national reactions for back-up capacities, and addressing the lack of right investment signals in the current market design. Meanwhile, it is essential that Member States implement the third energy package.

In the 1st Session, **Michel Matheu** (Head of EU Strategy in the Public Affairs Division, EDF), **Olivier Feix** (Head of Communications and Public Affairs, Elia Group), **Wolfram Vogel** (Director of Public Affairs and Communications, European Power Exchange – EPEX SPOT) and **Jonathan Gaventa** (Associate Director, E3G) discussed “What are the main barriers to the completion of the EU internal electricity market?”. They all underlined the current limitation of the EU competitiveness resulting from higher energy costs compared to other major trading countries such as the United States and China. Although wholesale energy prices are converging, national retail prices are diverging and increasing under the influence of market forces and government policies (mainly related to decarbonisation). The completion of the internal energy market through



interconnections and smart networks is one of the main instruments the EU has at its disposal to ensure the competitiveness of energy prices, alongside other policies such as energy efficiency and diversification of sources of supply.

All speakers agreed that great progress has been achieved over the past years. Nevertheless, the barriers threatening the completion of the internal electricity market are numerous, complex and heterogeneous. These barriers include: the massive deployment of decentralised and variable renewables into the system, the impact of national public schemes on energy prices, the decreasing profitability of conventional generation under current market conditions, the remaining gap between the evolution of the legal framework and the growth of renewables, the insufficient expansion of electricity grids and interconnections within the EU, and the limited public acceptance for the consequences of the energy transition. The main answer to this complex equation so far has been the adoption of national capacity remuneration mechanisms and national ancillary services in order to maintain the electricity systems balanced. Consequently, the security of electricity supply is currently more driven by national policies than by an integrated and cost-effective European approach.



During the 2nd Session, **Holger Gassner** (Head of Strategy and Regulatory Affairs, RWE Innogy), **Harry Verhaar** (Head of Global Public and Government Affairs, Philips Lighting), **John Sinner** (Senior Energy Economist, European Investment Bank) and **Stephen Woodhouse** (Director and Head of



Market Design Group, Pöyry) shared their opinions on “What are the next steps towards an integrated and long-term electricity market?” The growing spread of decentralized and variable renewable generation requires new ways of operating the whole electricity system. But we are transiting from an old system to a new one without knowing yet if the “learning by doing” process will work. However, everybody agreed on four main elements

this new electricity system requires for operating: upgrading and building new transmission lines across borders in order to integrate this increasing share of renewables; designing a stable long-term regulatory framework for this new power system that must encompass cross-border coordination, cost and benefit allocation, flexibility (including an effective demand-side-management) while reflecting all system costs; and finally shaping the governance of this new power system between the national, regional and European levels.

2nd Symposium: “Securing gas supply within an integrated European market – a strategy subject to many uncertainties”, 23 June 2015

As an ideal back-up source for renewables and the cleanest fossil fuel, gas generally is expected to retain an important role in the energy transition. The EU’s objective is thus to secure gas supply at affordable prices within an integrated European market. However, so far, there is a lack of visibility on the role of gas in the EU energy policy due to many uncertainties at international and European levels.

Thus, on the 23rd of June, more than 70 energy experts discussed how the EU could improve its strategy for securing gas supply within an integrated European market.



In his keynote address **Stefan Moser** (Head of Unit: Security of Supply at the DG Energy, European Commission) focused on the concrete actions in the area of energy security, solidarity and trust, which one of the five guiding dimensions of the Energy Union. These actions are: 1) security of gas supply with the revision of the Gas Security of Supply Regulation; 2) a comprehensive LNG and gas storage strategy; 3) alternative suppliers from the Southern Gas Corridor and Mediterranean; 4) reviewing the intergovernmental agreements; and 5) developing the EU energy and climate policy diplomacy.

In the 1st Session **Costanza Jacazio** (Senior Gas Expert in the Gas, Coal and Power Market Division, International Energy Agency), **Anders Marvik** (Vice President of EU Affairs, Statoil), **Marco Margheri** (Senior Vice President of Public and EU Affairs, Edison) and **Marco Giuli** (Policy Analyst in the Energy Programme, European Policy Centre) discussed “Why is a clear strategy for gas currently difficult to implement in the EU?”. In order to complete the internal gas market, important investments in domestic production, pipelines and interconnections as well as LNG terminals and gas storage are needed. However, all speakers agreed that the European gas policy has to become clearer and more effective in order to attract investment. The difficulties to complete the internal gas market over the past years are mainly caused by the low carbon prices, the lack of implementation of energy reforms in member states and conflicting policy signals.



In the 2nd Session, **Margot Loudon** (Deputy Secretary General, Eurogas), **Christophe Poillon** (Chairman of the Security of Supply Task Force, Gas Infrastructure Europe), **Jan Kerner** (Senior Market Development Leader – Europe, Russia and CIS, General Electric Power and Water) and **Coby van der Linde** (Professor, Clingendael International Energy Programme) shared their views on “What are the next steps towards an integrated gas market under the Energy Union?”. According to them the



first thing to do is to fully implement the Third Energy Package, with a potential wider role for ACER. This would create the basis of a well-functioning market that would give the right signals to stimulate infrastructure projects. Moreover, technology activism and political will should be more creative in the solutions proposed (e.g. using hydrogen in our gas infrastructure, new storage capacity for oil). Parts of the panel believed that

limited tailored interventions to improve security of supply can be justified, while others stressed that politicians should leave their hands out of the market.

3rd Symposium: “Reforming the EU ETS: Striking the right balance between the EU objectives of decarbonisation and competitiveness”, 8 September 2015

For the 3rd Symposium more than 100 experts of the European energy community accepted our invitation to discuss the structural measures proposed by the Commission to restore the EU ETS as a central instrument to decarbonise the European economy while preserving its competitiveness.

In her keynote address, **Mary Veronica Tovsak Pleterski** (Director for European and International Carbon Markets in the DG Climate Action, European Commission) presented the three key areas of the EU ETS reform. The first area is environment. In line with the objective of reducing emissions by at least 40 percent by 2030, the linear reduction factor of the cap will be increased. The second area is carbon leakage. The free allocation mechanism will be maintained but it will become more targeted on the most exposed sectors. Benchmarks will be updated to avoid windfall profits and reflect technological progress. The third area is the increase of innovation and modernisation funds, particularly in the least wealthy Member States, in order to incentivise the transition towards a low carbon economy.



Afterwards, **Sarah Deblock** (European Policy Director, International Emissions Trading Associations (IETA)), **Alessandro Bartelloni** (Policy Director, Fuels Europe), **Pavel Řežábek** (Chief Economist, ČEZ Group), and **Stefan P. Schleicher** (Professor of Economics, Wegener Centre on Climate and Global Change at the University of Graz) launched the 1st Session on the “lessons learned from the previous EU ETS periods”. Two important aspects were discussed. The first is to strike the tough balance between providing sufficient protections against the risk of carbon leakage and ensuring the ETS continues to provide incentives to innovate through stable and robust market prices. Therefore the stringency between supply and demand has to be made more predictable, while preventing carbon leakage through well targeted allocation of free allowances. The second lesson is the EU ETS overlap with other European climate policies that increase the structural oversupply. To mitigate this issue, a speaker proposed to ensure greater transparency for the emissions reduction costs of these other policies in order to compare with the EU ETS, while another speaker would like to decrease the annual EU ETS cap by the emissions saved thanks to other climate policies.

In the 2nd Session **Yvon Slingenberg** (EU ETS expert in the Cabinet of Commissioner Arias Canete, European Commission), **Anders Marvik** (Vice-President of EU Affairs, Statoil), **Sandrine Dixon-Declève** (Director, Prince of Wales’ Corporate Leaders Group) and **Damien Morris** (Head of Policy, Sandbag) discussed the reform of the EU ETS and its impact on EU competitiveness and other climate policies. Most of the panellists agreed on the fact that the EU ETS reform will induce significant progresses but it does not go far enough. Consequently a stronger linear reduction factor, more targeted carbon leakage options, a larger innovation fund and more frequent reviews of the system are needed. Most of the speakers also preferred to use the terminology investment leakage rather than carbon leakage. EU growth is stagnating and the lack of competitiveness of EU industry is not due to



the EU ETS but most of all to labour, transport and bureaucracy costs. Rather than discussing the avoidance of carbon leakage, the main question is thus “how can we address investment leakage in the EU?”

In conclusion, all speakers agreed that the EU ETS must remain the central pillar to decarbonise the European economy cost-effectively. However, it is the level of carbon price over the following years that will decide if the EU ETS is able to fill such a role. The climate agreement concluded at the COP21 in Paris was considered as crucial in this regard.

High Level Conference: “What are the European stakes towards COP21 and beyond”, 10 November 2015

Only two weeks before the COP 21 summit in Paris, around 120 participants gathered at the Egmont Palace in order to discuss the huge challenge of achieving an effective and fair response to global climate change, and how the implementation of the European Climate and Energy Strategy could fit into this new global climate agreement.

In a keynote address, **Jos Delbeke** (Director-General, DG Climate Action, European Commission) explained that the United-Nations’ approach towards climate change had changed since the signature



of the Kyoto Protocol in 1997. On the one hand, the division between developed and developing countries appears less clear than before. On the other hand, the old top-down approach has been transformed into a hybrid system between ‘top down’ and ‘bottom up’. The EU expected the COP21 to deliver a fair, ambitious and legally binding agreement that includes a long-term global target and the submission of reduction targets (INDCs) to a review mechanism every 5 years in order to eventually reach the 2°C target. Moreover, robust rules should ensure transparency and accountability as well as international support for low carbon, climate-resilient sustainable development.

During the 1st Session, many views were exchanged on the stakes of the EU towards COP21. **Andrey Rozhdestvin** (Regional Vice-President of Western Europe and Director France, Rosatom) explained that nuclear energy is indispensable if the EU wants to pursue all three key objectives of the Energy Union simultaneously, i.e. providing a reliable, climate-friendly and affordable energy supply. **Richard Folland** (Executive Director, Climate Markets and Investment Association (CMIA)) underlined five priorities for finance that should be part of the COP21 agreement and align with EU interests, namely a review mechanism to increase countries reduction commitments, cooperation on markets and carbon



pricing between countries, transparent and credible accounting of GHG emissions, a variety of funding sources, and recognition of the role of carbon sinks. Then, **Paul Spence**, (Member of the Executive Committee and Director of Strategy and Corporate Affairs, EDF Energy) stressed the urgent need for

a market framework that respects technology neutrality, creates a level playing field and the certainty and stability that incentivise the required investments in low-carbon generation. Finally, **Johannes Meier** (CEO, European Climate Foundation) stated that the EU's ability to deliver an aligned position and to implement effectively its target and climate finance will be crucial tests of its credibility on the international scene. Most importantly, if the EU delivers its stated energy and climate ambition there will likely be major rents from innovation of energy systems, from reduced fossil fuel imports and energy security.

In the 2nd Session, speakers shared their opinions on the European stakes beyond COP21. **Jean-Pierre Kempeneers** (Head of Royal Philips European Affairs office) outlined the great contribution of energy efficient lighting solutions to our climate goals. **Holger Gassner** (Head of Strategy and Regulatory Affairs, RWE Innogy) explained that the outcome of COP21 could bring the EU to question some fundamentals such as the level of ambition for CO₂ reduction; the protective measures regarding the risk of carbon leakage and a regular review of ambition levels. **Roberto Ridolfi** (Director for Sustainable Growth and Development, DG Development and Cooperation, European Commission) emphasised the role of energy as a key driver for sustainable growth worldwide. The EU has three priorities for developing cooperation in the energy sector: building on strong political ownership for policy reforms to attract investments; increasing the partner countries' capacity; and stimulating investments to extend access to energy with innovative co-financing schemes. Lastly, **Stephan Singer** (Global Energy Policy Director, WWF International) stressed that the COP21 commitments must be considered as a floor for further actions over time. Investment in green technologies makes increasingly economic sense and this trend will not stop after Paris. The question is thus not whether we will succeed in the global energy transition but how, and how fast.



In conclusion, all the answers to the various challenges discussed during this 2015 series of events will require technology developments, political will and coordinated action by Member States, the TSOs, the regulators and all energy and climate stakeholders. Each actor will have to accept to drop some of its individual decision-making powers in favour of a common approach, which is not only more cost-efficient but also more secure and sustainable.

It continues in 2016...

After the adoption of an ambitious global climate agreement at the COP21, 2016 will be a year of many legislative proposals that aim to give shape to the European Energy Union. Therefore, we will continue our Energy Transition series with three events focussing on the consequences of the global climate agreement on the EU's energy and climate policy, and especially on the expected proposals that are at the heart of the on-going construction of the Energy Union, namely

- the potential for European **innovation in the energy sector** in the aftermath of the COP21
- the potential for **energy efficiency in the building sector**, especially in light of the reviews of the Energy Efficiency and Energy Performance in Buildings directives
- the Commission's forthcoming proposal for a new **European electricity market design**

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Participants 2015

First Name	Last Name	Organisation	Position
Dafydd	ab Iago	Argus Media	EU Correspondent
Davy	Adam	Kingdom of Belgium Foreign Affairs, Foreign Trade and Development Cooperation	Attaché
Patrick	Adigbli	EPEX SPOT	Head of Public Affairs
Emmanuel	Auquier	Kingdom Of Belgium: Foreign Affairs, Foreign Trade and Development Cooperation DGE E4	Director
Kurt	Baes	Arthur D. Little	Partner
Mohamed-Raja'i	Barakat	Arab Rights Watch	Economy Expert
Cristiana	Barsony-Arcidiacono		
Victoria	Bataclan	Permanent Representation of the Philippines to the EU	Ambassador
Verena	Baumann	Austrian Chamber of Agriculture	Assistant
Abolfazl	Beheshti	European Network for Environment and Sustainable Development (EEAC)	Prof. International Relations and Energy Economy / Vice-President

First Name	Last Name	Organisation	Position
Niels	Bekkhus	European Free Trade Association (EFTA)	Senior Officer Energy
Luca	Bergamaschi	E3G	Researcher
Thomas	Bernheim	European Commission	European Semester Officer in the Brussels Representation
Mukund	Bhagwat	Aurubis	Corporate Energy Affairs
Costantina	Bitzos	FWI	Writer/Researcher
Giorgio	Bombassei de Vettor	AIESEC	Local Senior Member
Peter	Botschek	CEFIC	Director Energy, Health, Safety & Environment
Randall	Bowie	ECEEE	Board of Directors
Vladimir	Brednev	Permanent Representation of Russia to the EU	Senior Counsellor
Martijn	Broekhof	European Climate Foundation	Senior Associate
Els	Brouwers	Essenscia	Adviser Energy & Climate
Gunther	Browaeys	Defensie	Project Manager Energy
Andrew	Brown	Scottish Government	EU Energy Policy Advisor
Silvia	Brugger	Heinrich-Böll-Stiftung European Union	Director Climate and Energy Programme
Baptiste	Buet	AREVA Brussels	Director
Michael	Button	EEAS	Policy Advisor - Climate diplomacy
Luca	Camuncoli	EDF European Affairs	Head of Communication
Gabriel	Camus	Permanent Representation of France to the EU	Assistant Counsellor for Nuclear Energy
Tim	Cayford	Eurogas	Policy Adviser
Jarka	Chloupkova	European Commission / University of Missouri	Senior Policy Officer / Guest Lecturer
Monika	Chojnaca	Permanent Representation of the Republic of Poland to the European Union	employee
Gaëtan	Claeys	European Engine Power Plants Association (EUGINE)	Manager of European Affairs
Margot	Clifford	Friends of the Supergrid	EU Affairs Advisor
Michelle	Cooper	Permanet Representation of Canada to the EU	Counsellor - Head of Section (Agriculture, Fisheries & Environment)
Dominique	Cornut	European Turbine Network	Policy & Communication Officer
Bernadette	Costers	Freelance	Journalist
Daniela	Cuciureanu	Bank of America Merrill Lynch	Vice-President Government Affairs
Stefan	da Empoli	Institute for Competitiveness (I-Com)	President
Laurence	Damazie-Edmond	EDF	Senior Communications Officer

First Name	Last Name	Organisation	Position
Mapendo Serge	D'ambalasa	Kingdom Of Belgium: Foreign Affairs, Foreign Trade and Development Cooperation DGE E4	Trainee
Benoît	Dangien	EDF	
Cristina	Dascalu	Central Europe Energy Partners	Communication Coordinator
Hadelin	de Beer	Université Catholique de Louvain	PhD student
Nicolas	de Sadeleer	University Saint Louis-Brussels	
Baldwin	de Vidts	Sanremo International Institute of Humanitarian Law (IIHL)	Vice-President
Bert	De Wel	ACV-CSC	Advisor
Steivan	Defilla	Energy Charter Secretariat	Managing Director
Anneleen	Demey	ACLVB -Liberal Trade Union	Advisor
Michel	den Ruyter	Anciens de l'Universite de Louvain	Director
Yves	Desbazeille	EDF S.A.	Senior Adviser Energy
Danielle	Devogelaer	Federel Planning Bureau	Energy Expert
Bert	D'Hooghe	European Round Table of Industrialists (ERT)	Policy Adviser
Maurizio	Di Lullo	Council of the European Union	Advisor
Nicola	Di Robilant	Edison	
Ana	Diaz	Cátedra de Energia – Instituto Vasco de Competitividad	Researcher
Frank	Donkers	EuroACE	
Clémentine	d'Oultremont	Egmont Institute	Research Fellow
Louise	Dumont	Federal Public Service Finance	Intern
Katalin	Dusaucy-Rapp	Embassy of Hungary to Belgium and Luxembourg	First Secretary (Luxembourg)
Vincent	Duterme	Egmont Institute	Documentalist
Arnaud	Duvielguerbigny	COGEN Europe	Head of Policy
Anne-Claire	Eglie-Richters	EDF S.A.	Head of Environment and Climate
Adel	El Gammal	LowCarbonFacts	Executive Director
Gregor	Erbach	European Parliament	Policy Analyst
Arne	Eriksson	European Commission DG Energy	Policy Officer
Jean-Pierre	Ernotte	Federal Public Service Foreign Affairs	Attaché
Marco	Faleri	Edison International Holding N.V.	E&P Development Coordinator
Aurélie	Faure-Schuyer	Institut français des relations internationales (Ifri)	Research Fellow

First Name	Last Name	Organisation	Position
Eszter	Fay	European Environment Agency	Institutional Affairs
Alida	Ferhan	Permanent Representaton of Hungary to the EU	Trainee
Panos	Fetsis	AEIDL - NEEMO	LIFE Communications Team
Pavel	Fnasek	European External Action Service (EEAS)	Analyst
Iles	Forrez	Essenscia - Belgian Federation for Chemistry and Life Sciences Industries	Advisor Energy and Climate
Jonathan	Gaventa	E3G	Associate Director
Alexia	Georgakopoulos	Permanent Representation of Malta to the EU	Climate Change Senior Policy Officer
Anda	Ghiran	Johnson Control	Manager Government Relations
Stefan	Gielis	PA International Foundation	Research Consultant
Marco	Giuli	European Policy Centre (EPC)	Policy Analyst
Barbara	Glowacka	European Commission DG COMP	Case handler
Guy	Goemanne	Ministry of Defence (Belgium)	Senior Analyst
Florie	Gonsolin	FuelsEurope	Senior Policy Advisor
Corinna	Grajetzky	RWE AG	Manager European Affairs
Andre	Gray	Egmont Institute	Research Intern
Stinne	Grønne	North Denmark EU Office	Project Assistant
Ines	Grootaers	KUL - Catholic University of Lublin	Student Conference Interpretation
Zeynep	Gündüz	Permanent Delegation of Turkey to the EU	Counsellor
Andreas	Gürtler	EiiF	Foundation Director
Anca	Gurzu	Europolitics	Journalist
Siobhan	Hall	Platts	Senior Editor, EU Energy Policy
Sam	Hamels	Ghent University	Energy Researcher
Sari	Hanninen	General Secretariat of the EU Council	Desk Officer
Annika	Hedberg	European Policy Centre	Senior Policy Analyst
Anika	Heinmaa	European Parliament DG EPRS	Study Visitor
Laurel	Henning	MLex	Correspondent
Claudia	Hering	Development Group	Head of Public Affairs
Marius	Hirte	Council of the European Union	Director of DG E 1 (Environment/Climate/Education/Youth/Audiovisual/Sport)

First Name	Last Name	Organisation	Position
Robert	Hodgson	Montel	Brussels Correspondent
Lars	Hoelgaard	Think Tank "Farm Europe"	Senior Fellow
Martin	Hoffmann	acatech	Trainee
Belin	Hugo	Total	
Romain	Ioualalen	Industrial Innovation for Competitiveness	Associate
Seval	Iskender	Permanent Delegation of Turkey to the EU	EU Counsellor
Andy	Jackson	Belgian Defence	Strategic Analyst
Marie-Laurence	Jacquemin	EMI	Project Officer
Maria	Jernnäs	Permanent Representation of Sweden to the EU	Assistant
Therese	Jerome	Engie	Project Manager
Mark	Johnston	European Policy Center	Senior Policy Adviser (Energy & Climate)
Jan	Kerner	GE Power and Water	Senior Market Development Leader – Europe, Russia & CIS
Nico	Keyaerts	Florence School of Regulation	Research fellow
Irina	Klokova	Inter RAO Representative Office Belgium	Senior Associate
Gesine	Knolle	World Health Organization - Office at the European Union	Communications and Advocacy Officer
Wiebe Auke	Koehoorn	KUL - Catholic University of Lublin	Student Conference Interpretation
Adrian	Kondaszewski	Ministry of Foreign Affairs of Poland	Chief Expert
Wouter	Koopman	Shell-Upstream Europe	Senior Advisor Gas Strategy
Meike	Korff	Philips	Governmental and Public Affairs
Georgios	Kostakos	Foundation for Global Governance and Sustainability (FOGGS)	Executive Director
Karel	Kovanda		Former Representative of the European Commission
Ewa	Kubala	PGNIG SA	EU Affairs Expert
Pierre	Laconte	Foundation for the Urban Environment	President
Ruben	Laleman	Ghent University	Researcher
Alison	Langford	ExxonMobil	Adviser European Union Affairs
Macarena	Larrea Basterra	Orkestra-IVC	Researcher
Anne Britt	Larsson	North Denmark EU Office	Project Manager
Eldar	Latypov	Central Europe Energy Partners (CEEP)	Energy Policy Analyst
Matthias	Lauber	RWE AG	EU Affairs

First Name	Last Name	Organisation	Position
Patrick	Laureys	Elia Group	EU Political Communications Expert
Jerome	Le Page	EFET - European Federation of Energy Traders	Manager for European Electricity Markets
Christophe	Lesniak	European Parliament	Administrator Energy/Climate change
Kevin	Leydon	Institute for International and European Affairs Brussels	Trustee
Katja	Liimatta	Sass Consulting AG	Senior Communications Consultant
Vladimir	Likachev	Rosatom	
Baruti	Likoyi	Recherches et Documentation Juridiques Africaines asbl	Senior Research Fellow
Federico	Lioy	Institute for Competitiveness (I-Com)	Head of European Department
David	Livingston	Carnegie Endowment	Director - Energy & Climate
Margot	Loudon	Eurogas	Deputy Secretary General
Ryan	Lowry	Embassy of the United States of America	Second Secretary
Marie T.	Lubs	Association Royale de la Presse Nord-Sud	Freelance Journalist
E. Rodney	M. Perera	Permanent Representation of Sri Lanka Embassy	Ambassador
Robert Jan	Maaskant	Gas Infrastructure Europe	Vice-Executive Secretary
Jorgen	Madsen	Danish Energy Association	Head of EU Affairs
Fre	Maes	FOD VVVL	Senior Attaché
Cécile	Maisonneuve	IFRI – Centre for Energy	Senior Advisor
Jacques	Malache	International PRESS Agency	Senior Director
Marco	Margheri	Edison	Senior Vice-President Public and EU Affairs
Wim	Martens	Benelux Union	Senior Adviser Internal Market
Anna	Martin	Egmont Institute	Intern
Carolyn	Martin	EDF Energy	Head of European Liaison at EDF Energy
Michel	Matheu	EDF	Head of EU Strategy
Thilo	Maurer	European Commission	Budget Analyst
Morana	Mavricek	Afore Consulting	Junior Consultant
Koen	Meeus	Federal Climate Change Section (Belgium)	Climate Policy Adviser
Fanny	Mertz	Walloon Air and Climate Agency	Carbon market and Climate Advisor
Ariane	Meunier	Federal Public Service Finance	Conseiller
Guillaume	Meynet	Veolia	Policy Officer
Cheryl	Meynet	Permanent Representation of Malta to the EU	Climate Change Attache

First Name	Last Name	Organisation	Position
Jacques	Michaux		Former European Commission Official
Tiphaine	Milliez	Permanent representation of France to the EU	Relations with think tanks
Anouk	Moser	European Union Institute for Security Studies (EUISS)	Trainee
Daniel	Muether	German Federal Network Agency (Bundesnetzagentur)	International Coordination Energy Regulation
Tom	Murley	HG Capital	Leiter Renewable Energy Team
Fernando	Naredo	Westinghouse Electric EMEA	Executive Advisor
Jolanta	Navickaite	Permanent Representation of Lithuania to the EU	Deputy Energy Attaché
Doris	Neumann	European Commission	Research Programme Officer
Gabriel	Niedzialek	Central Europe Energy Partners	Intern
Ingvill Sjøvold	Nilsen	Confederation of Norwegian Enterprise	Assistant Director
Jean-Louis	Nizet	Belgian Petroleum Federation	General Secretary
Pierre-Emmanuel	Noel	European Investment Bank Brussels Office	Senior Banker EIB Representative for Financing Operations in Belgium
Ctina	Noiret Bitzos	FWBI	Trainer/Writer
Feilim	O'Connor	European Commission, DG Energy	Trainee
Louise	Olander	FleishmanHillard	Research Executive
Philippe	Opdenacker	Engie	Chief Analyst European Affairs
Marc	Otte	Egmont Institute	Director-General
Aurelie	Pattyn	Hydro	EU Affairs Manager
Bruno	Pedrotti	Philips	EU Regulatory Affairs Manager
Walter	Peeraer	Fluxys S.A.	Chief Executive Officer
Patrick	Peichert	Frontier Economics Ltd.	Consultant
Tapio	Pekkola	Nord Stream AG	Communications Manager EU and Nordic Policies
Marion	Perelle	European Commission	Economic Analyst
Michaela	Petz-Michez	Verbindungsbüro des Landes Salzburg zur EU	Director
Pietro	Piffaretti	Mission of Switzerland to the EU	Counsellor, Transport, Environment, Climate
Kamila	Piotrowska	International Association of Oil & Gas Producers	EU Affairs Manager
Christophe	Poillion	GIE - Gas Infrastructure Europe	Chairman of the Security of Supply Task Force
Ignasius	Priambodo	Indonesian Embassy	Second Secretary
Jakub	Przyborowicz	Central Europe Energy Partners	Co-ordinator of European Institutions' Affairs

First Name	Last Name	Organisation	Position
Stefan	Rausch	Development Group	Research and Analysis Public Affairs
Henry C.	Reese	ÉNERGIE Franco-Allemande	Secretary General
Nicola	Rega	CEPI	Climate Change and Energy Director
James Noel	Regan	Eurogas	EU Director Affairs
Valerie	Reif	Association of Austrian Electricity Companies	Adviser
Liesbeth	Reyskens	KUL - Catholic University of Leuven	Student Conference Interpretation
Hans	Rhein	European Commission, DG Ener	Senior Administrator
Olga	Rodovnitshenko	International University of Moscow	Researcher
Victoria	Ruijs	Vattenfall	Advisor European Affairs
Daan	Rutten	Clingendael International Energy Programme	Researcher
Paulina	Rydzewska	Council of the European Union	trainee
Kostis	Sakellaris	European Commission, DG Energy	Economic Analyst
Claire	Saout	Agence de l'environnement et de la maîtrise de l'énergie (ADEME)	EU Representative
Sebastian	Sass		Advisor for Communications and Strategic Relations
Johan	Scharpé	ExxonMobil Petroleum & Chemical B.V.BA.	Manager EU Affairs
Thomas H. A.	Schneider	European Federation of Executives in the Sector of Energy and Research (FECER)	Secretary General
Michael	Schneiß	Development Group	Assistant Public Affairs
Gerd	Schräder	RWE Innogy GmbH	Manager Regulatory Affairs
Dmitry	Semenov	Mission of Russia to the EU	First Secretary (Energy)
Teodora	Serafimova	Bellona Europa	Policy Assistant
Zhen	Shang	Permanent Representation of China to the EU	First Secretary, Legal Adviser
Susan	Shannon	Shell	Senior EU Affairs Manager
Stephan	Singer	WWF International	Director Global Energy Policy
Bart	Smedts	Royal Higher Institute for Defence – Centre for Security and Defence Studies	Research Fellow
Amadéo	Sobrecases	Institute of European Studies - ULB	Student
Júlia	Sokoloviová	Greenpeace	Regional Political Coordinator
Andrea	Sorbello	PA International Foundation	Research Consultant
Flemming	Sørensen	Novo Nordisk	Senior Category Manager, Energy
Alexander	Spachis	European Institute of Asian Studies	Senior Associate

First Name	Last Name	Organisation	Position
Gerald	Stang	EU Institute for Security Studies	Senior Associate Analyst
Sophie	Stas	Essenscia	
Thomas	Stehnen	Acatech Deutsche Akademie der Technikwissenschaften	Scientific Officer
Christine	Stevens	Egmont Institute	Senior associate fellow
Alice	Stollmeyer	@StollmeyerEU	Director
Albert	Strub	European Institute for Industrial Leadership	President
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Bruno	Tavares	European Commission	Trainee
Christian	Therkelsen	Aalborg University - Denmark (Brussels office)	Project Assistant
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Eva	Van Isterdael	BearingPoint Belgium	Consultant
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Pierre	Van Overstraeten	Federal Public Service Foreign Affairs	Assistant Collaborator
Renaat	Van Rompaey	Wageningen Intl Experts Wlx.nl	Director
Christian	Vanden Bilcke	Kingdom Of Belgium: Foreign Affairs, Foreign Trade and Development Cooperation	Head of Directorate Sustainable Development and Climate Change
Désirée	Vandenbergh	Ghent University	Research assistant
Robert F.	Vandenplas	European Society for Engineers and Industrialists	Member of the Board

First Name	Last Name	Organisation	Position
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