



CEEP
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REPORT



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Climate and Energy Policy 2030

We present below the main issues covered in a speech given by Mr. Janusz Piechociński, the Polish Deputy Prime Minister and Minister of the Economy, on the 13th of November, 2013, in the European Parliament. He was a guest speaker during the 'Coal days' organised by CEEP and EURACOAL.



Janusz Piechociński

By Janusz Piechociński

• Poland shares the opinion that when formulating a policy framework for climate and energy, there is a need to take into account the

wide scope of the socio-economic elements, including, the impact of the proposed solutions on the competitiveness of economies, the diversified potential of individual countries to implement low-emissions policy, energy security, and the need to ensure an acceptable level of energy prices by all the entities concerned.

• The determination of objectives should be closely correlated to negotiations regarding a global climate agreement. The current discussion on a framework of climate and energy policy by 2030 should only be used, as a universal declaration, to develop a conditional offer to global negotiations in 2015. Acceptance of unconditional reduction targets by the EU, before the end of the negotiations, will weaken the willingness of other countries to conclude

TO ALL MEMBERS,
READERS, AND
CONTRIBUTORS,

After three years of existence, I am proud to say that CEEP is still going strong, and takes part in almost all important debates on the future of energy in Europe. We are the voice of reason, professional responsibility, and practical experience. We are listened to with interest and, directly or indirectly, influence thinking on the future of European energy. This is an important achievement which serves all of us, and makes us proud of our contribution towards energy safety and sustainability. In that mood, I am pleased and honoured to congratulate and thank-you on your efforts. May the Festive time be full of joy, peace, and satisfaction and let us hope that the New Year brings success and prosperity to all of you.

One cannot underestimate the importance of what we are doing together. Energy determines the fixed cost ingredient in the pricing of any product or service. We are joining forces to maintain energy supply in Europe, not only the safest possible, but also supplied at an affordable price.

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Climate and Energy Policy 2030

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an agreement ('free rider' effect), and thus, undermine the main objectives of the climate policy.

- In addition, such actions may lead to increased carbon leakage, and thus, the environmental effects of EU policy would be counter-productive. Due to the use of more emission-creating technologies in some non-EU countries, than the average level of emissions in the EU, the relocation of production outside Europe would mean an increase in global emissions. Therefore, the proposals in the field of energy and climate policy should be examined and evaluated from the impact of a carbon leakage point of view, and, in the cases of negative impact, eliminated from the framework of climate and energy policy.

- New proposals must be strictly dependent on the experiences behind current package implementation, preceded by thorough analysis, and based on the correct conclusions. This concerns, in particular, the assessment of the EU ETS, as the main tool for reducing emissions in the EU. In the third calculated period, which began on the 1st of January, 2013, - the EU ETS operates on revised principles - there is the need for a long-term perspective to assess whether the proposed solutions to the system

are designed to reduce emissions in a cost-effective manner and what kind of changes will be needed in the future.

- It should be emphasised that the possible lack of effective, low-emission actions being initiated at the EU level, due to the absence of a global agreement, should not mean abandoning of the transformation towards a low-emission economy.

THE ROLE OF COAL IN THE ENERGY-MIX AND CLEAN COAL TECHNOLOGIES.

- Extensive coal resources are a Polish asset, which guarantee the energy security of the country. For this reason, in the coming decades, coal will remain a key fuel for the Polish energy sector.

- In the light of EU trends assuming reduction of the negative impact of the energy sector on the environment, in Poland, it is necessary to conduct investment in high-efficiency and low-emission power energy blocks. Development of innovative low-emission technologies, particularly Clean Coal Technologies (CCT) is also necessary.

- Progress in the field of energy efficiency is a natural ally in fulfilling the obligations to

reduce CO₂ emissions, and simultaneously, favouring a modernisation of the Polish economy. This is particularly important from the point of the Polish power generation sector, where about 40% of the plant is more than 30 years' old. This is also a chance to modernise the power generation sector, and increase the average efficiency of coal-fired power plants over than the current 35%.

- The innovative coal plants can significantly contribute to the objective of reducing CO₂ emissions, without the requirement to use CCS technology.

- Referring to clean coal technologies, the most prospective seem to be: coal gasification technologies and processing for liquid fuels, as well as carbon capture and storage (CCS) technology, which is not yet commercially available. In the long-term perspective, there is talk about the coal-nuclear synergy, which is: the combined operation of coal power plants, with the capacity of high-temperature nuclear reactors, to achieve a base for ecological generation of electricity, heat and carbon-chemistry.

- The Climate and Energy Package strongly presents a set of challenges to Poland, a coun-

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TO ALL MEMBERS, READERS, AND CONTRIBUTORS,

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It is not an easy task, as environmental and climate considerations apply strong pressure on countries to eliminate traditional fuels, and to switch wholesale to green energy. At the same time, the standard of living of the pressurised countries, particularly those in Central Europe, depends on intensive use of coal and lignite in the power stations. Both camps should be extremely careful and pragmatic in pushing their views. We must care for the environment, but we must also remember that human beings constitute an extremely important part of it. People deserve careful protection of their needs and standards of living.

May the process of understanding and listening to the needs of all parties, in the great energy debate, be even stronger in the coming year of 2014. We all depend on the result of that debate and we all have vested interests in reaching optimal, pragmatic decisions. In that spirit, I wish you all the best Season's Greetings and enjoyable New Year.

Paweł Olechnowicz
Chairman of the Board of Directors, CEEP,
December, 2013.



Climate and Energy Policy 2030

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try, which is dependent on coal in the generation of electricity and heat. This raises the need for close co-operation between the government, academics, and industry.

- In this context, an important event was the official opening of the Clean Coal Technologies Centre (CCTW) in Katowice, on the 14th May, 2013. Its aim is to create one of Europe's leading centres of research and development 'know-how', in order to commercialise innovative CCTs. A unique research infrastructure of CCTW, which will consist of, among others, demonstration installations, will allow the performance of basic research, realisation of research & development, as well as demonstration work relating to prospective clean coal technologies.

- Activities for the development of high-efficiency and low-emission coal technologies are changing the perception of coal, which can be seen as a relatively neutral fuel for the environment, acceptable, and supported by the EU, meeting stringent EU environmental standards. For Poland, there is a huge scope for action, a chance to develop innovation and improve the competitiveness of the economy. 

Janusz Piechociński

Polish Deputy Prime Minister and Minister of the Economy

LETTER FROM THE EDITOR

Dear Readers,

We are ending the year of 2013 in a mood of quiet satisfaction, with the 'CEEP Report' marking clear progress and pragmatic optimism for the New Year. During the past months, we have tried to balance views and opinions, to present a broad and well-considered panorama of Europe's energy needs, future ideas, sustainability, and security. That was the general idea, which prompted the starting-up of the CEEP Report's publication. I hope you will agree with our feelings that we have managed to stay 'on course', and delivered meaningful results.

Energy policy issues, combined with practical problems, are not easy subjects to discuss and present publicly. However, the more that is known, the better everybody understands the complexities which, in turn, provide for

more efficient work, in unison. Any contribution towards achieving these goals is very important. We hope to be a part of that process.



For the next year, the CEEP Report will continue to be open to CEEP Members and other important players' views and concepts. This will be even more important than in 2013, because some decisions will be made operational, and deadlines will draw nearer. I can assure you, dear Readers, that with your co-operation, we shall do our best to facilitate the development of a European consensus on energy issues.

Please accept our best Season's Greetings, and

a prosperous, successful New Year, from the CEEP Report's editorial team and myself,

Tadeusz Jacewicz,
Editor

To Members of the European Parliament

The European Parliament finally approved the long-delayed plan to raise the price of CO₂ allowances by 'backloading' 900 million of them, from the EU's emissions trading scheme. At this legislative stage, a formal acceptance of the Member States is needed, which will be taken on the 19th-20th December, during a Council Summit in Brussels.

Deputies added to the European Commission's proposals that the backloading mechanism can be used, only once prior to 2020, and can be applied in industries covered by the ETS, provided there is no 'significant risk' to move the industry's companies outside the EU. These two key changes were treated, at least, as a concession to attract more MEPs to vote for backloading.

As backloading is still very much connected with the ETS, a new debate will start from the beginning of next year, when the European Commission plans to reveal new proposals. Please find below, the Statement from Mr. Paweł Olechnowicz, delivered to all MEPs, before the backloading voting on the 10th of December, for which the content will still be valid when the ETS is discussed.



Paweł Olechnowicz

By Paweł Olechnowicz

Honourable Members,

I am writing to you prior to the important decision on backloading, which will be taken during a vote in an upcoming session of the European Parliament in Strasbourg, on the 10th of December, 2013.

To present you with the views of Central Europe Energy Partners (CEEP), representing companies and scientific institutions from Central Europe, we would like to inform you that we fully support the EU's objectives to fight climate change. Nevertheless, we believe that backloading is the wrong way

to do this. It puts the Central European economy, and above all, many energy companies, amongst others, in a very serious position. Some EU countries, being more affluent, do not calculate their costs as diligently as these firms from Central Europe.

A crucial element is the stability provided by the EU's actual policy to lower CO₂ emissions. It has been quite successful throughout our region, exceeding expectations since 2005. Therefore, the '20-20-20' targets for 2020 will surely be achieved, and in some cases, we may even exceed them. What is more pertinent, is that we will be able to achieve this, observing the yearly decrease of 1.74% of CO₂ under the ETS scheme.

If the EU wants to be competitive, it should aim for low prices of energy, which have a direct influence on the development of its' industry. Higher allowance prices, would add extra costs to the so badly-needed investments in the EU, not only in times of crisis, but in the future as well, as we struggle to stay competitive against other countries, such as China, the USA, Russia, etc. Already, some companies of the EU's steel, chemical, and car industry, to name a few, have begun moving to the USA. In the meantime, we have in the EU, a very serious problem with the competitiveness of refineries, which are being closed one after another, and we

seem to be willing to encourage this trend by forcing them to buy more expensive CO₂ allowances.

We are most concerned that such increases will weaken the capability of the EU to get out of recession and to regain competitiveness.

Moreover, we have 6 years till 2020: who will then decide to restore the held back 900,000 CO₂ allowances? When, why, and on what grounds? Backloading, in reality, means an 'unnecessary mess' in the industry, and definitely does not provide the stability so need by entrepreneurs.

We believe that rejecting backloading, does not mean neglecting the fight against climate change, as we should be aware that climate objectives have to be balanced with other aims, such as competitiveness, employment, and the harmonised development of industry.

Therefore, we invite you to support, with your voices - growth and job creation in the EU - and stand firm against any artificial intervention at this crucial moment voting against backloading as a detrimental concept.

Kind regards,

Paweł Olechnowicz
Chairman of the Board of Directors, CEEP



A fresh energy policy very urgently needed in the UK



Lord Howell

By Lord Howell

Windsor Energy Group's chairman Lord Howell has called for a radical rethink by the British government on energy policy and carbon targets. His comments (set out below) suggest that current policies have led to an "inevitable energy crisis". On November 27, 2013 he

chaired a House of Lords discussion on this topic. Here are his important remarks.

Lord Howell writes: "I have just returned from Japan. There they have just announced the abandonment of their 2020 decarbonisation targets. The previous aim was to reduce emissions between 1990 and 2020 by 25%. Now the realistic assessment is that they will RISE by 3% over that period. Between 2005 and 2020 the hope is that they will fall slightly - by 3.8%

- but that of course is a hope. If it fails then over the full 30 years from 1990 emissions will have risen by even more.

This saga should be a warning to all those who try to rush decarbonisation by crude and politically insensitive means. They should draw the same warning from what is happening in

Germany, where an ill-managed attempted rush to renewables targets and emissions reduction has resulted in sky high energy prices and a big leap in coal burning for electricity, with emissions going up instead of down. Low emissions gas turbines are closing down while American cheap coal, and brown lignite - the dirtiest of all - pours in.

Here in Britain we have been told that energy policy is supposed to address a 'trilemma'. The aim is to reconcile the three goals of affordability, reliability and consistency with climate and environmental targets. It is failing - and failing seriously - on all three fronts.

Affordability has long since gone out of the window, with crushing energy price increases not just hitting consumers and hurting the poorest families, but making industry uncompetitive, destroying jobs, holding back recovery and diverting new investment overseas to countries where power costs less. On present policies prices are set to go much higher still.

Reliability is now at serious risk, with the safety margin for electricity generation falling dangerously as leading and independent authorities keep pointing out. According to Ofgem there is now a real prospect of power interruptions and cuts immediately ahead. Old generating plant is being closed much too fast, thanks to pitiless EU directives, while new replacement investment in gas turbines is not taking place. Nor will current legislation, such as the much-vaunted Electricity Market Reform Bill, make much difference when there are so many deliberate disincentives to new gas investment, plus policy uncertainty on all sides. Even to induce longer term projects to go forward, such as the French-Chinese new twin nuclear reactor plant at Hinkley, enormous subsidies in the form of price guarantees for years ahead have been necessary, saddling consumers with unending extra burdens. And anyway that will be of no help with energy security or reliability for a decade ahead.



A fresh energy policy very urgently needed in the UK

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As for green targets, the third 'trilemma' goal, the bare figures may look alright on paper but we are deceiving ourselves if we think they are in reality being met or going to be met. Immense CO₂ volumes are being generated in the production of the manufactured goods we import. At the same time renewables stand no hope of meeting growing power needs. As we seek to modernise our infrastructure, build new airports, roads, railways, these will require prodigious quantities of power and energy however much energy we save in our homes. The only hope of curbing CO₂ growth would be through burning much more gas, but that is being discouraged. So we will miss our real targets, which themselves, even if reached, would have had a minimal impact on global greenhouse gas reduction.

And in the attempt we are inflicting major environmental damage on our precious landscape environment, siting giant wind pylons

obtrusively, and now according to Ministers, in the wrong places. That will mean switching stations and electricity pylons in the wrong places as well - all environmentally negative and the opposite of 'green' in their impact.

The irony is that Britain has ample energy resources - or access to resources. The North Sea is still full of potential. Coal abounds, ready for gasification. Wind, wave and solar power can play a useful supporting role, although they can never meet our industries' base load needs, and the costs of renewables need to be brought down dramatically. We have good supplies of on-shore shale gas, of which a proportion could prove commercial if extracted sensitively - which means well away from our countryside and villages, whether north or south, where people don't want fracking, and instead in areas left derelict by past industrialisation and crying out for new energy investment, where people DO want it and where

the biggest deposits are. That is only common sense.

Meanwhile we are surrounded by neighbouring countries eager to sell us more piped gas, with unlimited quantities of frozen gas (LNG) being available from more distant sources to fill our national gas grid. And we are also surrounded by willing suppliers of electricity (mostly green) through new inter-connectors - notably Belgium, Denmark, Ireland, more from France and in due course from Iceland and Norway on a major scale. Indeed, quickly laid inter-connector cables could well help us survive the crisis years immediately ahead.

But meanwhile, to have created this energy shambles out of potential abundance has required ministerial and policy incompetence and muddled thinking under successive governments on a grand scale. People are entitled not only to be angry, but also, more construc-

tively, to call now for a major policy shift to ease price pressures, restore energy investment and security of supply, cut the subsidies which hurt the poor while boosting the rich, damage industry and jobs, and do little or nothing to combat climate change.

In short, we very urgently need a fresh UK energy policy which does indeed deliver affordability instead of soaring energy bills, helps competitiveness instead of holding Britain back, promises reliability instead of power shortages and green advance instead of green pain and environmental damage. Many of us have watched the present policies evolving over the years with increasing dismay as they head towards the inevitable crisis which is now upon us. The 'trilemma' is not only unsolved, to our great cost, but has been made progressively worse. A change of direction cannot come too soon. ☺

The Energy Policy of the forthcoming Grand Coalition in Germany



Petra Erler

by Petra Erler

Germany decided to push the production of renewable energies in 2000, based on the so-called EEG (renewable energy law). Several EEG provisions have been changed since then, however, and a complete overhaul, originally envisaged by the last coalition in 2013, failed. Now, it will be the responsibility of the new coalition to make the necessary adjustments and changes, and consequently, the coalition agreement offers some political orientations. The present EEG stipulates renewable energy quotas in total energy production. In 2020, 35% of all energy production should be coming from renewable energy sources,

50% in 2030, and 65% in 2040, and finally, it should continue its march towards the 80% mark by 2050. The coalition partners have basically confirmed this rate of progress. However, they have also agreed on corridors, thus envisaging a minimum and a maximum level of renewable energy production in any given year, which puts a break on any sudden surge of renewable energy production. The final corridor was fixed between 80% and 95% in 2050.

Unlike the procedures in other EU countries, the German EEG does not oblige energy producers to produce fixed quotas of renewable energy, but operates with a guaranteed feed-in, at fixed tariffs for renewable energies, thus eliminating any market risk for producers of renewable energy in Germany.

The EEG has indeed effectively promoted the production of renewable energies, which has grown by more than 10 times between 2000 and 2011, but diminished by one third in 2012. The costs jumped up by a factor of 17 since 2000, and reached 15.4 billion € in 2012. For 2013, the forecast indicated that the whole system might cost 20 billion €. Consequently, energy prices in Germany are constantly on the rise, and would continue to do so, if the system remains unchanged. So far, the EEG has not dealt with the security of supply of renewable energy, which would require backup facilities and smart grids. Smart grids are not available yet, and the conventional energy producers

in Germany, who guarantee the security of energy supply, are suffering losses.

The coalition partners have agreed on general principles and some basic elements for the forthcoming reform of the EEG in 2014. The framework conditions for energy intensive industries, and those which are competing internationally, shall not deteriorate. Old energy production installations and current investments will also not be affected by the EEG's reform. This provision limits the overall reform impact substantially, however, it protects the legitimate expectations of the owners and investors of such undertakings, which is a key legal principle in Germany.

Nonetheless, the coalition partners want to enhance the affordability of the whole system and have agreed that excessive subsidies for new installations shall be avoided. Full market integration of renewable energy production remains the ultimate goal of the reform.

The reform concept does not question the privileged market access for renewable energy producers, but it foresees declining subsidies for new installations. Large producers of renewable energy may be also obliged to guarantee a minimum supply of energy. Given the unstable nature of renewable energy production, that will imply either storage capabilities or contractual arrangements with producers of conventional energy. It will start



The Energy Policy of the forthcoming Grand Coalition in Germany

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with a pilot project and will be introduced step-by-step. The coalition partners also considered direct marketing for new, large installations producing energy from renewable sources from 2017 onwards, which means that those installations would no longer receive feed-in tariffs. For the time being, the coalition partners consider that Germany disposes of sufficient, conventional energy capacities. They do not, though, fully exclude the need to add new capacities at the regional level. Since conventional capacities are considered imperative for the security of energy supply for the foreseeable future, they shall receive financial support.

The coalition partners explicitly stated that the EEG incentives do not constitute an (illegal) subvention, thus repeating a judgement of the European Court of Justice of 2001. Yet, it is already well known that the European Commission is investigating the provisions of the current EEG, with regard to privileges for energy intensive enterprises, and will issue its decision in December 2013, most likely an infringement procedure. Furthermore, the Commissioner for Energy, Gunther Oettinger (CDU), reacted very sharply to the EEG part of the coalition agreement, which, he considered 'insufficient', as it will not lead to reasonable energy prices in Germany. Already in November, he had been publicly speaking about the intentions of the Commission to advocate feed-in premiums, instead of feed-in tariffs, since such premiums would better respond to real market conditions and therefore, be more effective. Formally, the Commission is expected to issue such guidelines only in 2014. Commissioner Oettinger also warned against the envisaged premium for con-

ventional energy producers for guaranteeing the stability of supply, and announced that this would immediately trigger another infringement procedure of the Commission.

Commissioner Oettinger is not alone with his negative reaction to the EEG's provisions. Quite a number of German commentators believe that the coalition partners failed to agree on a deep and comprehensive reform, and missed a fully-fledged energy concept. Commissioner Oettinger's sharp reaction also left some questions open: Were the coalition partners ignorant as regards the European dimension? Are they actively looking for a clash with the present (and the future) Commission, which will inevitably come?

The coalition agreement favours the creation of a fully-functioning, market-based (European) ETS, and underlines that there should not be any further withdrawal of auctioning certificates from the market. It also deals with the need to build up storage capacities in Germany, and to construct modern energy infrastructures. This is a key question for further development of renewable energy production in the future, notably for off-shore wind energy. The total new infrastructure costs are high. Estimates are within the range of 3.4 to 4.5 billion € annually. However, every concrete project faces immediate and massive public resistance from the affected population, and subsequently, may witness substantial delays. Therefore, the consultation process with the public will now be improved. The coalition partners also envisage a new burden-sharing between network owners and network users, to the benefit of the owners, to encourage investment in new infrastructure.

To nobody's surprise, the coalition partners re-confirmed the nuclear exit strategy. Nevertheless, they did not manage to find an agreement on Gorleben, which will/ will not be the final storage location for nuclear waste.

The coalition partners fully responded to the strong public objections against fracking, as there will be no fracking for the foreseeable future. They concluded that more research was needed and that 'absolute' priority should be given to environmental concerns (protection of water quality, human and animal health), announcing legislation on the issue. Energy efficiency measures form another pillar of the energy strategy for the forthcoming 4 years. Energy efficiency will have to improve dramatically to achieve the very ambitious German CO2 emissions reduction target of 40% in 2020 (compared to 1995). Therefore, Germany also advocates further widening of the scope of the Energy Efficiency Directive and will insist on a very broad application of the leading approach. Energy efficiency will also take its place amongst the top research priorities in Germany. 

Petra Erler

PhD, a Managing Director of the European Experience Company (EEC). In 1999 she joined the European Commission as a member of the cabinet of Commissioner Verheugen and continued during the second term of Vice President Verheugen in the Commission, responsible for enterprise and industry. She held the position of a Head of his cabinet from 2006 to 2010.

WARSAW'S COP-19 PRESIDENCY: FAR MORE OF A SUCCESS THAN DEPICTED

Creating a climate for climate change



Dariusz Szymczycha

By Dariusz Szymczycha

The Warsaw Climate Change Conference, 'COP-19', has been assessed from different angles. In some European capitals, the talk is of how ambitious goals have not been reached. Representatives of environmental organisations have expressed their attitude towards the conference with protest action and left before final agreements were made. Despite all this, it is impossible to overlook the opin-

ion of Christiana Figueres, Executive Secretary of the UN Framework Convention on Climate Change, who said: "The results of the Climate Conference in Warsaw have exceeded expectations. We have done a lot for the success of the next COP in Lima, the achievement of a global climate agreement in two years in Paris, and lowering the increase of average temperature in this century by 2 degrees".

So, what have the delegates from 194 countries actually achieved?

1.

A roadmap for a new climate agreement, which is to be signed in 2015 in Paris, was established. According to the map, a draft of the agreement is to be ready for next year's 'COP-20' Conference in Peru, and the parties should present their suggestions of new goals by March, 2015. The delegates almost left Warsaw, without reaching agreement on this. At the last moment, the word "commitments" was changed to the phrase: "contributions without prejudice of a legal nature". This means that countries will not have to present their own CO₂ emissions reduction goals, only their contribution to global climate policy. Con-

tributions do not necessarily have to involve CO₂ emissions reductions – they may involve smog reduction or increased financing of the fight with climate change.

Such changes were passed under pressure from developing countries, and this particular amendment was suggested by India.

In the provisionally accepted document, states were invited to "initiate or intensify" domestic efforts to establish their "contribution" to global climate policy, and asked to present this suggested contribution long before the conference in Paris. Countries are expected to have done this by the first quarter of 2015.

We have to be aware that as we draw closer to the end of the French Presidential term in 2015, the bigger the pressure on establishing specific reduction goals will be – as France is one its biggest advocates. France's stance is easy to understand, as it generates 75% of energy from non-emission atomic sources. The current attitude of the United States towards this issue marks a significant change. Until now, they have supported business interests, but now, they are ready to restrict emissions, as the shale revolution has provided America

with cheap gas. Gas combustion generates roughly 30-40% less CO₂ than coal combustion.

2.

A decision was made regarding the financing of the Green Climate Fund, which was established in 2009, in Copenhagen. Its goal is to finance actions benefiting the climate and restricting the emission of greenhouse gases in developing countries. By 2020, the fund should have 100 billion dollars at its disposal. In Warsaw it was agreed that developed countries would assign at least 10 billion dollars per year to the fight against climate change in developing countries, in order to mobilise further funds from private sources.

3.

The Warsaw Loss and Damage International Mechanism was established. Its goal is to finance both adaptation to climate change, and reaction to sudden climate phenomena in developing countries. Detailed works on the mechanism will begin next year. The Warsaw Mechanism is a particular achievement for the Warsaw Conference, as those countries most vulnerable to sudden climatic phenomena have lobbied for its establishment from

WARSAW'S COP-19 PRESIDENCY: FAR MORE OF A SUCCESS THAN DEPICTED

Creating a climate for climate change

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the very first conference - that is, for the last 20 years! The point was to establish the Warsaw Mechanism, so that it may work under the Adaptation Framework, established in 2010, in Cancun.

Initially, developing countries wanted the loss and damage issue to be dealt with by a new, separate institution, but the developed countries did not agree to this.

4.

Thanks to the efforts of the Polish Presidency, participating countries have declared the payment of over 100 million dollars to the Adaptation Fund. The Fund will finance adaptation to climate changes in the 48 poorest countries in the world. Payments will be made, amongst others, by Austria, Belgium, Finland, France, Germany, Norway, Sweden, and Switzerland.

5.

An agreement on the REDD Mechanism Warsaw Framework was signed. This mechanism is dedicated to tropical forest protection and preventing deforestation, with a view to reducing emissions. Developing countries which

lower their emissions and stop deforestation will receive financial support from the UN. Such support, 280 million dollars, was declared by the USA, Norway, and Great Britain.

6.

During the Warsaw conference - for the first time in COP's history - dialogue with industry and municipal authorities' representatives took place. Up till now, no conference host had previously had the audacity to invite industry representatives and 'lend an ear' to what they had to say, on an issue which is obviously vital to their operations and relevant to their interests. It is hard to believe, that until recently, political decisions were made without the involvement of those, on whose actions they had such a significant impact.

7.

The rules of co-operation on the new climate agreement within the so-called 'trinity' were established. For the first time in history, three Presidencies (Poland, South America, and France) will work together on the new climate agreement - the mechanism is similar to that of the EU Presidency.

Conferences such as this are not spectacular. What decides their success or failure is not announced in public statements or heated polemics, but in technical negotiations. For this reason, those entering the National Stadium, where the conference took place, did not feel the excitement of a big game, as the decisive action took place in the working groups with mysterious names, such as SBI, SBSTA and ADP. Final documents were passed during the negotiations, which lasted for 38 hours, and extended beyond the scheduled, official closing of 'COP-19'.

Poland, and in particular, Warsaw, proved to be a good location for a climate compromise. An attack on Poland as the host was to be expected, as Poland's energy production is 88% based on coal. Environmentalists even mockingly called Poland, 'Coaland'. Meanwhile, Poland is responsible for less than 1% of global emissions, and is not even in the top ten in terms of generated CO₂ pollution. Germany, by way of contrast, depicted as an example of a green energy country, at the fore of emissions reductions, actually pollutes more than twice as much as Poland! Not mentioning the

U.S. with their 17.0 ton CO₂ emissions per capita and Polish around 9 ton per capita.

The Polish Presidency underlined that, in climate protection, all countries should adhere to the call of the 'Three Musketeers': "All for one, and one for all!" The new agreement has to be global. Minister Marcin Korolec, the Conference Chairman, declared - disregarding the European political correctness - that conducting the EU's climate policy in isolation, no matter how noble the motivations and goals, is simply "foolish", as it causes industry to migrate to countries, where the authorities do not care about environmental protection. As a result, the EU loses jobs, and is struggling with high unemployment. The common sense approach by the Polish 'COP-19' Presidency may have helped to reconcile the interests of developing and developed countries. 

Dariusz Szymczycha

A Polish politician and journalist, who served as Secretary of State in the Chancellery of the former Polish President, Aleksander Kwasniewski, Senior Advisor in Grupa LOTOS S.A.

Poland implements CCS Directive



Agnieszka Kowalczyk

By Agnieszka Kowalczyk

On the 27th of September, 2013, Polish Parliament passed a law on carbon capture and storage (CCS). Amendment of Geological and Mining Laws was prepared in order to implement the EU directive - 2009/31/EC, regarding the terms of demonstrative CCS projects. Accord-

ing to the new law, CO₂ underground storage, as well as seeking and recognising geological formations for CO₂ storage, will require a mining concession issued by the Ministry of Environment. The important thing is that the concession can be issued for demonstrative projects only, and will include the period of the project and the immediate 20 years after the closure of the project. Entrepreneurs will be obliged to exercise control over the CO₂ storage, in order to protect against undesirable effects, e.g. CO₂ leakage to the atmosphere or underground water. Then, in the next 30 years, monitoring will be the responsibility of a special government institution.

1. CCS – THE OPPORTUNITY FOR FOSSIL FUELS

The deployment of renewable energies has not yet resulted in reversing the growth of fossil fuel usage. The implementation of carbon capture and storage (CCS) has, therefore, been proposed for trapping CO₂ emissions from power plants and other stationary installations, and storing them permanently in subterranean geological formations. Carbon would be permanently removed from the biosphere.

CCS is already being deployed in North America for enhancing oil production using CO₂ injection. However, the additional quantities of extracted fuels that make extraction profitable emit greater quantities of CO₂ when burned, than the carbon dioxide captured to implement the process. This application of CCS, therefore, runs against the objective of inhibiting global warming. The European Union is committed to diminishing greenhouse gas emissions by at least 20% by 2020, and probably up to 30% by 2030.

However, carbon reduction is particularly difficult to achieve in regions with abundant fossil fuel reserves, and rising populations having the right to free access to energy and governed by different CO₂ policies than the EU's one. Conversely, widespread resource deficiency in the European Union has stimulated price-driven efficiency strategies for reducing energy imports and associated emissions.

Rather than abandoning fossil fuel infrastructures, some of the EU countries are striving to sustain them by diminishing their contribution to climate change. The European Commission has asserted that "coal can continue to make its valuable contribution to the security of

energy supply and the economy of both the EU and the world as a whole, only with technologies allowing for drastic reduction of the carbon footprint of its combustion". Carbon dioxide may be prevented from reaching the atmosphere, by capturing the emissions at the point of combustion, using suitable filter technology, and transporting them to a storage repository or sink, generally a deep geological formation that is subsequently sealed for permanent isolation (sequestration) from the biosphere. In the European Union, carbon dioxide capture and geological storage is perceived as a bridging technology that will contribute to mitigating climate change. Three types of subsurface formations are under consideration for permanent geological storage: oil and gas reservoirs, sedimentary saline aquifers (porous sandstones permeated with salt water), and deep coal beds.

2. EU SITUATION

Directive 2009/31/EC on the geological storage of carbon dioxide (the so-called CCS Directive), was adopted on the 23rd of April, 2009, by the EU legislator, as a part of the climate-energy package. The Directive sets environmental rules and liability requirements for the geologi-

Poland implements CCS Directive

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cal storage of CO₂, and removes barriers in existing legislation to enable CCS to be applied. EU Member States have an obligation under EU law to incorporate the provisions of the CCS Directive into national law and must communicate the text of any such laws, and other administrative measures, to the European Commission. The deadline for communication specified in the Directive was the 25th of June, 2011.

Only 10 member states implemented the Directive, at the proper time. Legal processes in many member states are in progress. Some countries, like France and the United Kingdom, started the process, immediately after the adoption of the Directive.

Germany began work on a CCS law in 2008. According to the EU's information, Germany hasn't implemented the Directive yet. In Spain, the statute passed after parliamentary debate on the 29th of December, 2010, and entered into force on the 30th December, 2010. Austria, Denmark, Ireland, Romania, and Sweden implemented the directive, whereas Austria has forbidden CO₂ sequestration on its territory. In terms of Central and Eastern Europe, the CCS

Directive was implemented in Latvia and Lithuania. Finland does not have any storage capacity, and so transposition is reported as being a straightforward process. Most member states turned the Directive into law by the adoption of existing regulations (often mining law).

3. GEOLOGICAL STORAGE CONFLICTS

Exploration activities for storage in North America have not evoked much public concern, due to the established use of CO₂ for hydrocarbon extraction, the low population density of many sequestration regions, and the allotment of royalty income to affected landowners. In Europe, public opposition has formed against CCS implementation, due to the infringement of property rights with little or no compensation, unresolved issues of storage integrity, and the suspected collusion of governments with power companies over CCS ventures. Many potential storage sites in Germany were unknown until Greenpeace obtained a classified list of 408 locations from the mining research authority, BGR, in February, 2011. Real estate values have declined by up to 20% in some regions, due to prospective geological storage. The enduring devaluation of

private property in entire communities could outweigh the transient commercial benefits of avoiding ETS obligations.

Groundwater resources for potable supply represent a major potential environmental receptor, in the context of risk mitigation for the geological storage of a greenhouse gas, especially for onshore and near-shore storage scenarios. Many of the onshore and near-shore sedimentary basins around the world which hold significant potential for storage in deep saline formations (DSF), depleted hydrocarbon fields and coal beds, may also contain important potable groundwater resources at shallower depths.

It is conceded that migration of CO₂ could occur along undetected or incorrectly interpreted faults in caprocks, or in faults that have become transmissive because of mechanical reactivation or elevated reservoir pressures.

Potable groundwater resources represent a key risk receptor for geological storage schemes, particularly in onshore locations. Potential impacts on groundwater resources could be negative or positive. Negative im-

pacts could result as a consequence of the following potential mechanisms:

- Leakage of CO₂ from the storage site into potable aquifers – impacts could include acidification and mobilisation/increased concentration of other substances;
- Displacement of high salinity groundwater ('brine') from deeper storage formations into potable aquifers;
- Disruption of aquifer flow systems and groundwater discharge patterns (natural and artificial) by pressure disturbances due to geological storage.

While the immediate risks of CO₂ pipelines and injection wells are covered by operator insurance, latent hazards imperilling future generations are difficult to quantify and impossible to predict. ○

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Natural Gas in the Eastern Mediterranean – Opportunities and Challenges



Peter Whiley

By Peter Whiley

The Atlantic Council, EUCERS, and the IICEC, organised a ‘ground-breaking’ Summit on the 19th November, at Sabanci University, Istanbul, Turkey, to closely examine recent and exciting energy developments in the Eastern Mediterranean. This preceded the Atlantic Council’s fifth Annual 2-day Energy and Economic Summit on the 21st-22nd November, also in Istanbul. As for the Eastern

Mediterranean Summit, CEEP was a partner of this event, which was attended by major energy figures from Turkey, Cyprus, Israel, Europe, and the USA, including, Professor Dr. Ni-

hat Berker, President of Sabanci University, and Professor Dr. Friedbert Pfluger, Director of EUCERS, King’s College, London. The event analysed whether the region, fraught with tensions and conflicts, could exploit its immense energy potential and become a significant gas supplier to Europe. In the meantime, energy could help provide several cash-strapped countries in the region with much-needed prosperity, and possibly, a greater chance of peace and regional co-operation.

Janusz Luks, CEO of CEEP, took part in the Summit as a panelist on a session looking at ‘Eastern Mediterranean Gas and the Southern Gas Corridor’. He was joined by such notable guests as D. Frank Umbach, Associate Director, EUCERS; Yvonne Ruf, Energy Infrastructure Expert for Roland Berger; and Androulla Kaminara, Director/Special Adviser for the European Commission, based at St. Antony’s College, Oxford. Mr. Luks was keen to focus on the opening of the Southern Gas Corridor in 2018, - an EU-led initiative - through the Trans-Adriatic Pipeline (TAP), as being a major milestone, which could enhance the energy security of supply throughout Central Europe, and lead to further diversification, by tapping on the gas resources in the Eastern Mediterranean region. “Central Europe cannot be left out”, he

stressed adding that “the Southern Gas Corridor, through inter-connectors, has to be approachable for all European States. By this, he meant that it is imperative that Central Europe should already be thinking about how both corridors are connected and how it could branch off them to provide CE economies with additional supply, diversification and energy security.

The challenge now, as Mr. Luks sees it, is to both tap the gas-rich fields of the Eastern Mediterranean, which were discovered in 2009, as well as the immense hydrocarbon resources waiting to be tapped beneath Eastern Mediterranean waters. Part of that challenge means overcoming regional tensions, conflicts and legal disputes. Mr. Luks emphasised that energy could well be a factor for stability and prosperity in this traditionally-turbulent area.

He suggested that the EU could implement an effective energy policy for cheaper gas to come to Europe, by assisting the Eastern Mediterranean, and in particular, its Member State, Cyprus, through this important period of transition from natural gas dependence to natural gas abundance. Certainly, in his mind, the region’s vast potential could well prove to be an ‘important backbone’ for the emerging EU internal energy market.

Natural Gas in the Eastern Mediterranean – Opportunities and Challenges

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Turkey could well prove to be a decisive player in the unfolding game of regional gas, as its hosting of the Summit showed. Its successful collaboration with other countries in the region, notably Cyprus, could contribute to the improvement of the overall situation in the area.

For countries such as Cyprus and Greece, there is the obvious opportunity of repairing their ailing economies. Together with Turkey, they can begin to forge the cornerstone of a new potential Eastern Mediterranean Energy Corridor, with regular flows of cheaper gas to Europe. Whilst the unpredictability and volatility of the region could well scupper well-laid plans and intentions, strong hope remains that the economic arguments will 'win the day' and lead to greater regional integration and co-operation. Europe, and in particular, the countries of Central Europe, are banking on this happening. 

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EUCERS/ACUS/IICEC - 'Eastern Mediterranean Gas and the Southern Gas Corridor', 19 November 2013, Istanbul, Turkey.

ENERGY DIALOGUE AT THE REICHSTAG



Arash Duero

By Arash Duero

The 42nd Energy Dialogue at the Reichstag - at the invitation of Prof. Dr. Friedbert Pflüger, Janusz Reiter and Central Europe Energy Partners (CEEP) – discussed the German Renewable Energy Act within the context of ongoing coalition talks on November 15th, 2013 in Berlin.

Dr. Joachim Pfeiffer, Member of the German Parliament and the CDU Spokesman for Economic Policy, opened the discussion by stating that a potential Grand Coalition government can offer the long-sought opportunity to make the policy adjustments that are necessary in order for Germany's energy transition to succeed. He said that a Grand Coalition can help establish broader consensus on a range of energy issues and identified the multitude of differing political

interests in the past as being the main reason for the failure to introduce urgent and comprehensive reforms. Dr. Pfeiffer did acknowledge that there are differences between the CDU and SPD parties regarding certain policies like the introduction of national climate legislation, which the CDU deems unnecessary. Nevertheless, he underscored the fact that both parties could agree on fundamental issues like the need to overhaul the Renewable Energy Act in order to curtail rapidly rising electricity prices and prevent market distortions. On the issue of “capacity markets”, Dr. Pfeiffer stated that his party is taking all concerns of the energy industry into account, but dismissed the need to establish such markets now due to the sufficient availability of conventional back-up power capacity until 2017. Finally, Dr. Pfeiffer explained his lack of support for the EU's backloading proposal by asserting that any changes made to the current system would only undermine its credibility as well as its long-term predictability.

Prof. Stephan Reimelt, CEO of GE Energy Germany, described Germany as the world's largest energy lab. He stressed the im-

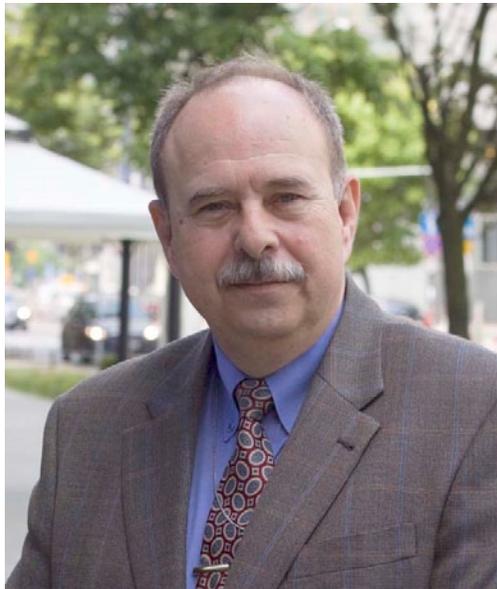
portance of making the German Energiewende a success, noting that the world is watching the country closely. Prof. Reimelt said one of the central challenges of the Energiewende is the need to bring the existing, largely centralized energy supply system in harmony with an increasingly decentralized production system due to the rapid expansion of renewable energy. Here, he cited bottlenecks and insufficient capacities in the distribution grid as one of the key hurdles that have to be overcome. Touching on the subject of offshore wind, Prof. Reimelt claimed that technological challenges are still vastly underestimated and need to be addressed accordingly. Ultimately, he identified technological innovation as the key pre-condition for a successful and sustainable energy transition. 

Arash Duero

Consultant Energy, Pflüger International Consulting GmbH

2013 – A REVIEW

Loud and clear



Janusz Luks

By Janusz Luks

The voice of Central Europe Energy Partners, CEEP, has been heard in 2013. Our position concerning backloading, energy prices, and the need to re-industrialise Europe, has been widely quoted and commented on by the me-

dia. We have made our views known during seminars and panel discussions held in Bratislava, Vilnius, Katowice, and Krynica-Zdrój, as well as the ‘Coal Days in Brussels’ held in the European Parliament, where the Deputy Prime Minister of Poland, presented his views on EU energy policy in the presence of a big audience of MEPs, Ministers, representatives of the European Commission, and specialists. The role of Central Europe Energy Partners (CEEP) as a co-organiser of regular meetings in the German Parliament for discussions on the effects of the Energiewende policy should also be mentioned.

CEEP speaks out for a balance between the EU’s economic and climate policy, and for invigorating Europe’s economic growth. More specifically, an energy policy, which does not take into account the differences in economic development, is detrimental to the countries of Central Europe. That’s why it remains so important to convince and draw the attention of governments, parliaments and the general public in the European Union, to the fact that implementing climate policy objectives, especially in terms of the reduction of CO2 emissions, should be modified, so that the

economic balance and social costs, especially in Central Europe, are properly considered. “If we believe in a strong and competitive Europe, we should allow EU Member States to use the cheapest and most readily available indigenous sources of energy, with a simultaneous and stable reduction of CO2 emissions”, emphasised Paweł Olechnowicz, Chairman of CEEP’s Board of Directors.

‘WHAT ENERGY, PRICE, GROWTH?’

In mid-April, we took part in the GLOBSEC 2013 Conference (Global Security Forum) in the Slovak capital, Bratislava. It was an important event, implemented within the framework of the Polish Presidency of the Visegrad Group.

The report ‘What Energy, Price, Growth?’ prepared by the consultancy firm, Roland Berger, for Central Europe Energy Partners, presented at GLOBSEC, had pointed out the differences between the EU-15 countries, and the countries who joined the EU after 2003, known as the EU-11. It was noted that Brussels is proposing a uniform energy policy, which will produce only one noticeable effect - a systematic increase in energy prices. This, in turn, will effectively inhibit the growth of Central Euro-

pean countries. That is why it is so important for the countries from the CE region to use all available opportunities to diversify the sources and means of energy production.

To satisfy the energy policy guidelines for 2020, Central Europe needs to invest in both the efficient electricity generation and transmission to the order of 400-460 billion Euros. It is huge investment. Its costs will have a major effect on the price of electricity and push it dramatically up. We estimate that such growth could reach levels of 40% to 60% for industrial customers in the EU-11. It will undoubtedly impact on our individual consumers.. “We have absolute confidence that the economies and societies of Central European countries will not accept this situation”, the report asserts.

THE EUROPEAN ECONOMIC CONGRESS

In May, Central Europe Energy Partners organised a panel discussion titled: ‘The role of energy in a competitive Europe’ during the 3rd European Economic Congress in Katowice. According to the panellists, the reduction process of the fossil fuels use in the case of the EU-11 region will take a lot more time than people think. This is not opportunism: this is a simple

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statement of fact that the transformation will be very expensive for the region.

The panellists urged that we need to revive and develop industry in order to stimulate economic growth and generate new jobs. This would not be possible though, if the costs of energy keep on climbing.

Lessons learned from the recent crisis in Europe clearly indicate the need to redefine EU climate policy, and put it ‘in-sync’ with the EU’s social and economic policy. The panellists warned that if such policy alignment did not happen, then “we will never restore our economies to the path of growth, and never rebuild our potential”. The key to the economic upturn in the USA was the shale gas and shale oil boom, which radically affected energy prices, pushing them down to the levels not listed anywhere in the world. Now, the American economy is booming, competitive, and new jobs are being created.

‘ONE VOICE’ ABOUT ENERGY IN EUROPE

One of the key events during the Lithuanian

Presidency of the European Union was July’s ‘29+1’ CEEP debate in Vilnius. This formula had already been successfully tested in 2012 in Budapest. The key concept underlying such meetings is to develop a common position of companies from Central Europe’s Energy Sector, on major issues of EU energy and energy security policy. Participating Members have an opportunity to freely present their views and discuss their problems with Mr. Guenther Oettinger, the EU’s Commissioner for Energy, under the Chatham House Rule format.

A major component of the debate turned out to be a discussion of the key findings from the Roland Berger Report. The main message conveyed to Commissioner Oettinger was that low prices of energy and the use of indigenous raw materials are key factors in determining the development of Central Europe and the whole EU in the current macroeconomic situation..

The philosophy of growing economies through the development of services is no longer valid.

A healthy industrial component still remains an anchor for the economic growth of our societies.

ENERGY SECURITY IS ENERGY INDEPENDENCE

Many politicians and businessmen participated in the panel discussion: ‘The EU’s internal energy market - a chance for Central Europe?’ organised by CEEP during September’s 23rd Economic Forum in Krynica-Zdrój. The most important message from this debate was that a return to growth in the next few years is, and should be, a priority for all European economies. There was also unanimous consent that the creation of the Internal Energy Market presents Central Europe with a whole set of welcome opportunities, especially in the cohesion policy area, and specific challenges, which need to be monitored and addressed whilst the IEM process progresses.

“The situation is gradually improving, but when we look at the details in individual countries, then you will see significant differences. I am convinced, that the only way, which leads to an economic revival and real economic growth is to strengthen European competitiveness through industrial development”, concluded Paweł Olechnowicz.

DOES EUROPE NEED INDUSTRY?

In the first days of July, the European Parliament voted in favour of the intervention in the market for trading CO₂ emissions, involving the suspension of the auction of a large batch of emissions permits. The Commission’s proposal meant that, despite the crisis, and contrary to market principles, the price of CO₂ allowances should increase. The adopted ‘solution’, regarding ETS ‘backloading’, is bound to undermine the competitiveness of EU industry in the global market.

Fast development of renewable energy sources in the EU, including CE countries, has created certain problems for the entire power system. The impact of too rapid a development of renewable energy, for example, in Germany or the Czech Republic, has led to a wide debate, and even political declarations, aimed at reducing the rate of subsidies, because the existing transmission infrastructure, currently lacks the capacity to absorb electricity from unstable RES. CEEP has been monitoring closely both issues and contributing to the ongoing debates and consultations.

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NEW MEMBERS, EXPANDED OPPORTUNITIES

Three new companies involved in the energy, metallurgical, and petrochemical industries became members of CEEP in 2013. The Lithuanian operator of transmission grid networks, LitGrid, was the first to join. The company not only manages a national energy grid, but also builds connections between Sweden, Poland, and Lithuania. This is one of the biggest and most important Lithuanian companies.

In September, IMPEXMETAL from Grupa Boryszew, became a CEEP member. One of the largest Polish commercial-industrial holdings, it produces: aluminium, copper, zinc and lead, as well as products like: bearings, cables, tubing, etc. Impexmetal is listed among the 500 largest companies in Central and Eastern Europe.

In November, Grupa Azoty became our 21st member. Formed after the consolidation of a large part of the Polish chemicals market,

Grupa Azoty, together with their smaller subsidiaries in Europe, serves customers in 50 countries around the globe. By the end of June 2013, employment in the whole group totalled more than 13 thousand people.

Impexmetal and Grupa Azoty, though not directly involved in energy production, are very big consumers of energy. They are vitally interested in all EU regulatory activities concerning energy, including CO₂ emissions and other pollutants, and they consider CEEP as a good platform for expressing their needs.

LOOKING FORWARD TO THE NEXT CHALLENGES

The main task of CEEP in 2014 will be to continue to promote and facilitate the integration of the energy sector in Central Europe. Fully supporting the EU's '20-20-20' targets, CEEP will promote a balanced approach to achieving the EU's climate protection goals, sustainable development, and security in the energy sector. This means support for a

common, wide, and comprehensive EU policy which will take into account the interests of Central Europe, such as the North-South Central Europe energy and transportation corridor.

We have to examine what fosters and what blocks economic recovery. It is, necessary to restore the value and importance of social cohesion, and economic competitiveness across the EU. An essential and effective element in reducing economic disparities is a dynamic development of industry. Only in this way, will we be able to generate funds necessary for future investments and effectively limit unemployment. If we want to have a responsible energy policy, we cannot forget about the differences in the economies between Member States. ☺

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