



eurelectric

Annual
Report
2017

The Union of the Electricity Industry – eurelectric is the sector association representing the interests of the European electricity industry at pan-European level. We represent the power sector in over 30 European countries, speaking for more than 3,500 companies in power generation, distribution and supply. We also have affiliates and associates on other continents.

In line with its mission, eurelectric seeks to contribute to the competitiveness of the electricity industry, to provide effective representation for the industry in public affairs, and to promote the role of electricity both in the advancement of society and in helping provide solutions to the challenges of sustainable development.

eurelectric's formal opinions, policy positions and reports are formulated in Working Groups, composed of experts from the electricity industry, supervised by five Committees. This "structure of expertise" ensures that eurelectric's published documents are based on high-quality input with up-to-date information.

For further information on eurelectric activities, visit our website: www.eurelectric.org

eurelectric pursues in all its activities the application of the following sustainable development values:

Economic Development

Growth, added-value, efficiency

Environmental Leadership

Commitment, innovation, pro-activeness

Social Responsibility

Transparency, ethics, accountability



www.eurelectric.org/annual-report-2017/

Many stakeholders are now benefitting from more accessible online information and helping the environment too. Throughout this Activity Report, you will find QR codes like the one to the left. Download a QR code scanning app to your smart phone and scan the QR code with your phone's camera. This will lead you to our online Activity Report. Enjoy our videos and interactive highlights!

Table of contents



Introduction	4
Message from the Secretary General	5
Looking to the Future	6
Interview with eurelectric President Francesco Starace	8
2017 Overview	10
Sector Performance Highlights	12
Communication Highlights	13
2017 at a glance	14
Vision for the European Electricity Industry	18
Our Projects	19
Electrification	20
Accelerating Electrification - A Bright Future for Europe	
Decarbonisation	22
Taking the lead in Europe's Clean Energy Transition	
Markets	24
Creating Smarter and Fully Integrated European Power Markets	
Consumers	26
Empowering Consumers in a Digital Energy Future	
Distribution	28
Promoting DSO innovation in Europe's energy transition	
Innovation	30
Discovering cutting-edge business models and breakthrough technologies	
Sustainability	32
Sustainability	34
Embedding Sustainability throughout our value chain	
Annexes	36
eurelectric Member Organisations	38
eurelectric Board of Directors	40
eurelectric Structure of Expertise	42
Our Team - eurelectric	44



Message from Kristian Ruby

eurelectric Secretary General

Meeting 2018 with a new vision

2017 was a milestone. In the industry, in Brussels and in eurelectric. With the EU economy beginning to pick up, the overall profitability of our sector is also returning.

Nevertheless changes continued to sweep across the European power industry. Over 16 GW of dispatchable plants were decommissioned and due to continued cost-reductions, renewables experienced another bumper year. As a consequence, the carbon footprint of electricity fell further, strengthening its position as Europe's cleanest energy carrier.

The most significant industry trend in 2017 was the massive move towards electrification of transport. In the US, the first mass-produced copies of the new Tesla 3 rolled off the assembly line in June. But 2017 was the year where electric went mainstream in the car industry. Volvo, BMW, Range Rover, Porsche, VW, GM, Audi and Toyota all made game-changing announcements about new lines of electric cars.

Four major OEMs announced a joint venture to roll out a network of ultrafast-charging stations across Europe and several major utilities formed e-mobility divisions and announced plans to roll out charging infrastructure projects. And electrification continues to seek new frontiers: heavy duty vehicles, aviation and maritime transport are all emerging as new industry segments that could switch – at least partly – to electricity in the future.

In Brussels, the European Commission tabled new proposals aimed at decarbonising the transport sector. The proposal requires a minimum of 30 % of all new cars and vans to be electric (or otherwise low-carbon) by 2030. But as shown above, it will be no big surprise if that target is outperformed, once the structural shift to e-mobility is completed in the industry.

Moreover, the reform of the EU emissions trading scheme was finally concluded after more than two years of negotiations. eurelectric

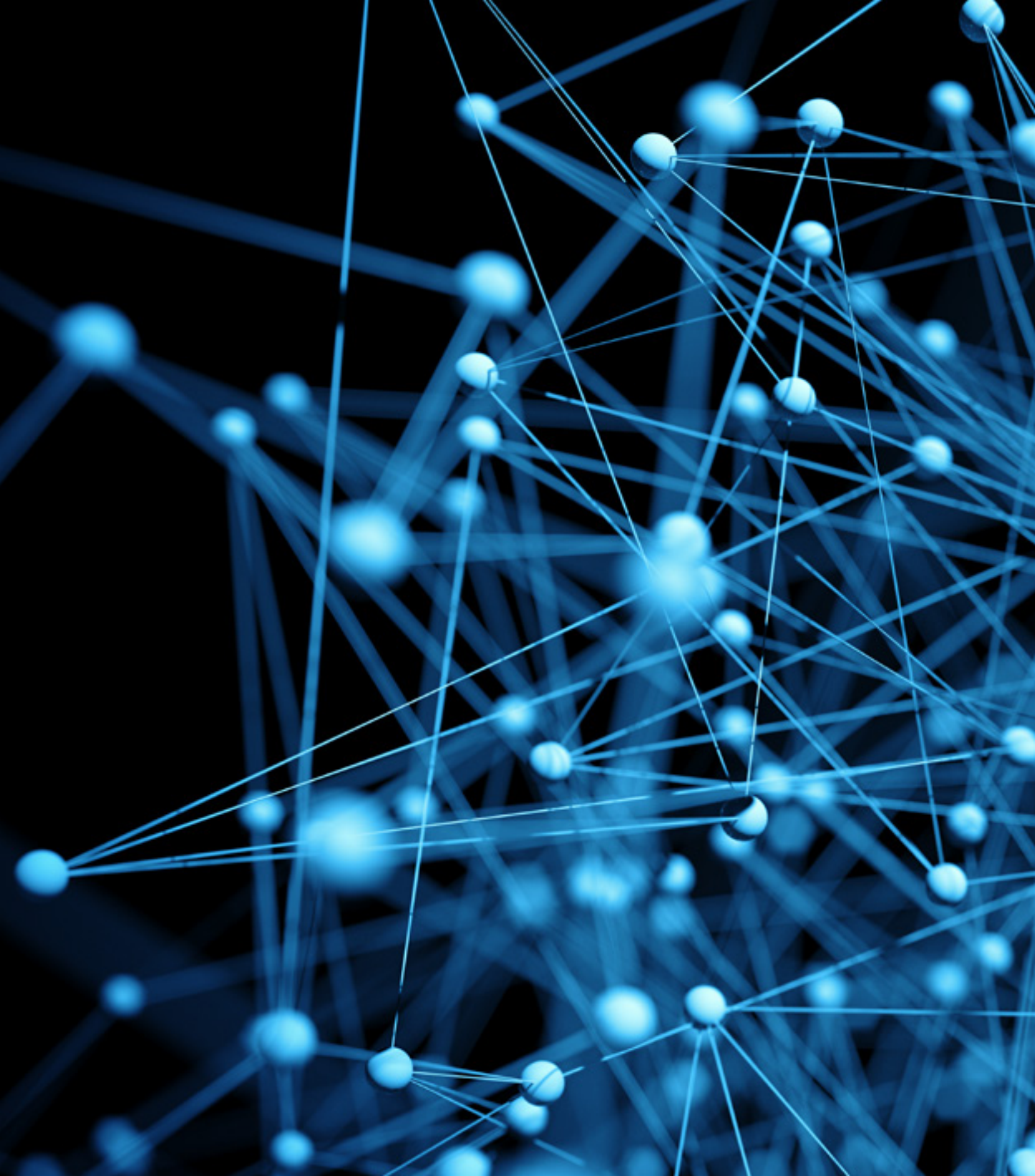


had advocated a more ambitious reform, but the reform still provides some much-needed legal certainty to the sector. Deliberations on the Clean Energy Package also advanced in both Parliament and Council. Yet, significant work remains for 2018, in order for the post 2020 framework to be completed.

In eurelectric, Francesco Starace, CEO of Enel, took over as President from Antonio Mexia, CEO of EDP. The Secretariat presented a three-year strategy to modernise the association. And in November, the Board of Directors adopted a new joint industry vision by unanimous decision. With the new vision, the European power sector clearly states its intention to lead and accelerate the energy transition.

With 2017 we passed a milestone. Disruption will dwell. Challenges will persist. But we are ready to face them. Our industry is united. And we have a clear, common, ambitious vision for the future.

“Disruption will dwell. Challenges will persist. But we are ready to face them. Our industry is united.”





looking
to the
future

Interview with Francesco Starace

eurelectric President



Francesco STARACE

You took over the eurelectric Presidency in June. What is your vision for electricity in Europe?

This is a good time to be president of eurelectric as our industry sees now a great opportunity in the progressive electrification of Europe's energy consumption in parallel with an increasingly decarbonised and a sustainable electricity generation mix. I think the industry is undergoing a tremendous change across the whole value chain. This transition is driven by the tremendous technology evolution we are witnessing. In light of this, we need to go beyond the limits of the traditional business paradigms and be bold enough to exploit the potential synergies among the various parts of the value chain. This transition requires also an unprecedented level of collaboration and coordination among industries and countries to create a more efficient system. We should be ready to partner as never before with non-energy industries such as automotive, construction and ICT to create value outside our conventional boundaries.

Thanks to technological innovation, electricity will play a fundamental role within the transition towards the zero carbon economy foreseen by the Paris Agreement. As of today the technologies offering the most reliable and scalable opportunities for decarbonisation are all applications that bring electricity to displace fossil primary energy sources.

The progressive and economically viable decarbonisation of electricity generation is playing a key role in solving some of the toughest challenges of our times: decarbonising the economy, reducing pollution in cities and using energy more efficiently in buildings and transport.

Electrification is therefore the cornerstone of the vision I have in mind for Europe. For this reason, I believe, the European electricity sector – represented by eurelectric – has the responsibility to lead this transformation.

A question on the Vision statement? The European electricity sector is committed to becoming carbon neutral by (well before) mid-century. Are you on track to meeting that goal?

On decarbonisation, the question is no longer "if", but rather "how". How can we address the urgency of climate change? How can we build an energy efficient and sustainable society for Europe?

Our ambition of reaching carbon neutrality well before 2050 may be attainable even as soon as the 2040s and some companies are already on their way to reach this goal. However, we need to acknowledge that there are different starting points, because we have a legacy to deal with. We have to find sustainable solutions able to manage responsibly the existing carbon-intensive assets and their value chains that still operate in several European countries.

The Vision statement will concretely lead all of us – some sooner and some later – to the development and massive deployment of new technologies, to the electrification of new sectors, to a rapid digitalization of assets that we need for the transition towards a resilient and low-carbon economy.

This is what the vision statement is about: recognizing where we are, defining where we are going and committing to the steps that will get us there, in a responsible and fair transition.

The Presidency Manifesto you announced at the beginning of your Presidency sets the scene for an accelerated decarbonisation of the European power sector. What is the one thing that will be crucial to achieve this?

Frankly speaking, we should not focus on the power sector alone. Thanks to renewables, our industry has already contributed significantly to emissions reduction, becoming the leading actor in the fight against climate change. By contrast, other sectors – such as transport and heating & cooling – have lagged behind for a long time. Now, as we truly aim at making our societies emission-free, decarbonising power will not be enough.

However, an increasingly decarbonised electricity can make a big difference right here. There is no energy carrier that can curb GHG emissions in transport and heating & cooling sectors to the same extent and scale as electricity. Switching to electricity in those sectors means significantly reducing their GHG emissions because of both energy savings, due to the higher efficiency of electricity-based technologies, and an increasing decarbonisation in the electricity generation. Electrification across all end-uses will allow us to recover the precious time our society has lost.

For instance, look at the disruptive change brought by e-mobility: an electric car already emits way less carbon and is already much more efficient than an internal combustion engine, from an energy use standpoint. Electrification is not something belonging to the future but a readily available option that we can deploy already today. It is for this reason that we urge policymakers and stakeholders to recognize the key role that electricity can play by strongly pushing for greater electrification of the economy as a whole.

What role do you see sustainability playing in ensuring that the sector maximizes its value to society?

All the big societal challenges we face today – climate change, air pollution in our cities, and depletion of natural resources – stem from an unsustainable development pattern. Over the years, companies have remained trapped in an outdated approach to value creation focused merely on optimizing short-term financial performance while missing the most important customer and societal needs. It is now clear that such approach has lasted too long and that sustainability is a cross cutting component of the entire electricity value chain.

Not only is embedding sustainability the right thing to do, but also the smartest choice in times when competition for resources is increasing. In other words, sustainability represents a concrete business opportunity as it defines a roadmap to create sustained shareholder value. This is something that markets nowadays recognize to companies truly embracing sustainability, which are rewarded with higher returns. Sustainable businesses are able to increase supply chain resilience, recruit and retain talent, build trustful partners and open new revenue streams.

Our industry, as an enabler for development, plays a key role in bringing business and society back together and in paving the way towards a fully sustainable future. Through our projects, we can accelerate fair and inclusive development, bringing immediate improvement to citizens through better air quality and health, reduced energy poverty and resilient infrastructures. All

this, while fighting climate change. As we move along the path sketched by the Presidency Manifesto, eurelectric will become more and more involved in sustainability activities. In this respect, taking concrete pledges towards various Sustainable Development Goals is one of the options that I suggested we could explore with our Members.

Renewable technologies (like solar and wind power) have matured significantly in recent decades. They are now considerably cheaper, even than many optimistic estimates. What do we need for renewables to truly transform the power generation fleet?

Progress was faster and deeper than expected in renewables, which are increasingly becoming a technology “fit for the market”. Indeed, they are already the most competitive option for power generation in many markets and the footprint of where this competitiveness will play in the next future keeps growing as their cost of generation keeps going down. Moreover, they are enhancing the security of supply of the energy systems where they are being inserted. In this context, a higher and economy-wide share of renewables is, not only possible, but within reach. To achieve this goal, we need to adapt the regulatory framework to the new structural conditions and emerging priorities. What I have in mind is a holistic and forward-looking market design, where a level playing field is ensured and renewables are delivered through market-based and technology-neutral mechanisms, including long-term contractual arrangements. Addressing the impact of overlapping policies on the ETS will also be key.

Electrification means that the power sector must interact more and more with other key industrial sectors like automotive and ICT. What are your main objectives for this?

Digitalisation, distributed generation and technological progress are changing the fundamentals of our sector and revealing unprecedented cross-sectoral synergies, which can create a lot of value. Smart digitalized networks and aggregation platforms will enable us to reach a deeper sector integration, a greater flexibility for the power system and an optimized use of all assets. Digitalization will change how we interact with the grid on a daily-basis, how and when we consume, drive, produce and conduct business. This is why we should push for a full digitalization of DSO networks and an efficient management of data to ensure the sector can extract maximum value from its assets and business models while guaranteeing citizens’ privacy, ensuring cybersecurity and improving quality of service. These “empowered” grids are also key to enabling the transformation of the transport

system. Electric cars reached their point of technological maturity and will become sooner than we expect a reality for millions of drivers. Not only will they provide another use of clean electricity in a world of polluting inefficient fossil fuel use, but they can also be an important source of storage and flexibility for utility companies.

Thanks to technology, electric cars will be turned into large mobile batteries that are able to interact with the power grid. While connected to a grid, cars can help balance out power flows on the grid itself and earn their owners some revenue.

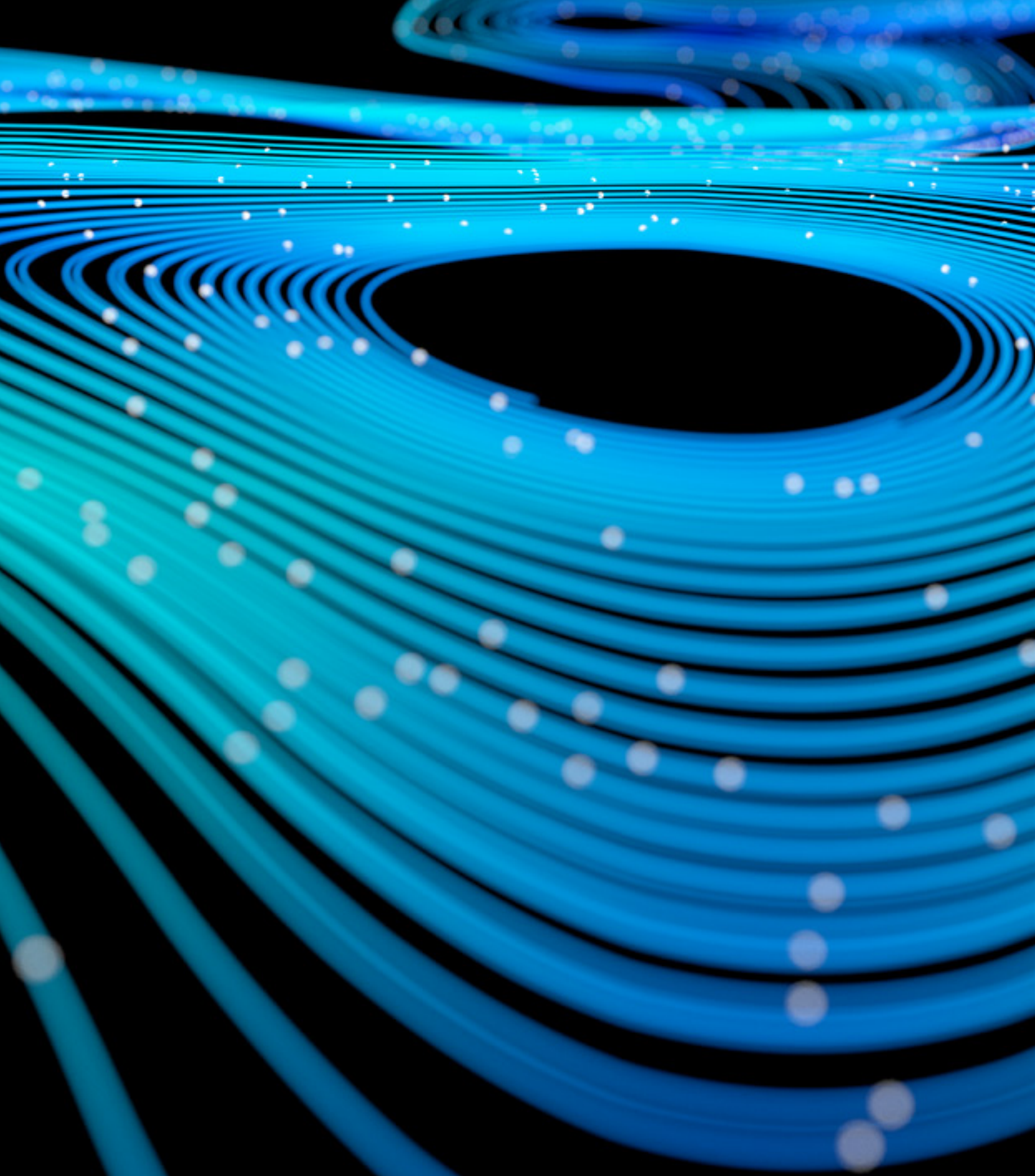
Energy storage and batteries have huge growth potential. How do you see that developing considering demand-side management, which is being rolled out simultaneously, might make them unnecessary?

I think there is no risk of cannibalisation between storage and demand management, simply because, from a technical point of view, they respond to different flexibility needs. Demand response can be more cost efficient for the provision of certain balancing services in contingency situations, while storage can be more suited to provide continuous services such as regulation or load following. Combined with the increasing uptake in renewable energy and the electrification of transport, storage and demand management will allow market players to mix and match the flexibility needs of the system, making it more resilient and more secure.

I do believe that both technologies will be extremely important in driving the energy transition. They will ease the emergence of a fully empowered customer as the one of the key elements of the new European market design. They will surely favour those players able to quickly grasp this change.

With increased digitalisation and technology innovation such as blockchain becoming more commonplace, future energy transactions are likely to be unrecognizable to what we are used to. How will the sector adapt to these changes?

Blockchain technology can further strengthen the role of consumers, because it enables them to buy and sell directly with a high degree of autonomy. In other words, blockchain has the potential to catalyse all those business models that substantially integrate a broad set of distributed assets. In addition, it could also provide the basis for enhanced efficiencies in metering and billing. However, as with any young technology, time will tell if it really has the potential to scale up in the energy sector, and to influence the dynamics of the entire value chain – or just of a portion of it.





2017 overview

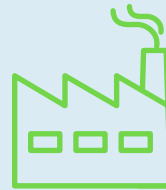
Sector Key Figures

>2,400
Distribution Companies



3,500
Companies

>1,100 GW
Capacity



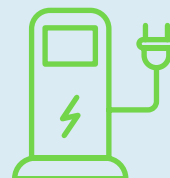
>3,500 TWh
Generation annually

22%
Electrification Rate



59%
Carbon free electricity

34%
Renewables
Production Rate



>100,000
Electric Vehicle
charging stations

Communication Highlights



WEBSITE

120,000
visits



PUBLICATIONS

100
reports and papers



ADVOCACY

>60
meetings with
MEPs, Ministers
and Commissioners



PRESS

2,400
citations



SOCIAL MEDIA

9,000
followers



AVE

€15.5
million

2017

at a glance

JANUARY

Kristian Ruby takes office as the **new Secretary General** of eurelectric.

eurelectric publishes report on smart grid cybersecurity. The report highlights that network operators should have a well-structured cybersecurity strategy and develop cybersecurity competencies in order to avoid data loss, blackouts and invasion of privacy.



Kristian RUBY

FEBRUARY

eurelectric publishes report entitled "Towards an Energy Transition on Europe's Islands", which highlights the energy situation of European islands. The report is discussed at an event "Islands: Part of the Solution to the 2030 Climate and Energy Challenges".

Secretary General Kristian Ruby meets with Miguel Arias Cañete, Commissioner for Climate Action & Energy, to discuss the sector priorities.

MARCH

eurelectric and VGB announce a partnership on hydropower to raise the profile of **hydropower generation** at the EU level.



Magnus HALL, Kristian RUBY

APRIL

In a statement adopted by eurelectric's Board of Directors, the sector reiterates its commitment to the Paris Agreement. The sector announces its intention not to invest in new-build coal-fired power plants after 2020. eurelectric also launches its position on the various proposals in the Clean Energy Package.

The **high Level Electrification Conference** "Power to the People – Electrification of the European Economy" gathers 150 participants in Brussels for an event which brings the theme of Electrification at the core of the energy debate in Brussels. At the Conference, eurelectric launches its Electrification report "A Bright Future for Europe" and animated video, as well as a wide-ranging advocacy **campaign on electrification**.

eurelectric organises the first edition of its "Power Talks" series of informal events in Brussels. The first Power Talks brought together sector players, NGOs and industry



Jos DELBEKE

representatives for an engaging debate on key market related issues under the Clean Energy Package.

The Secretary General together with Pekka Lundmark, CEO of Fortum, and Patrick O'Doherty, CEO of ESB, meets with Maros Šefčovič to discuss the EU's decarbonisation and electrification agenda.

MAY

eurelectric organises a conference on “Smart Regulation for European energy consumers” which debated key proposals regarding the consumers’ active participation in the energy market and the new role of DSOs in the energy transition.



Representatives of the Electrification Alliance

In a joint statement, EFET, eurelectric and Europex, call on all types of demand response to comply with common market rules and compete on a level playing field with other market participants.

eurelectric publishes report and video detailing its views on an appropriate EU framework to tackle Energy Poverty.

JUNE

eurelectric launches an **expert blockchain platform** together with its membership to investigate the potential of Blockchain technology across the electricity value chain including generation, trading, supply and networks.

eurelectric organises the “Design the Electricity Market(s) of the Future” event in partnership with The Florence School of Regulation, seeking to open the debate and gather innovative visions for the functioning of a decarbonised electricity market.

eurelectric partners with GE through the Ecomagination Challenge. This event brings together developers of Europe’s most innovative thinkers to build digital solutions to help decarbonise energy and transportation in Europe.

eurelectric publishes a **Strategic Vision for DSO** – “From Pipes-to-Platforms” which considers the changing business model of DSOs to meet customer expectations and bring all market parties together.



Formula-E car

eurelectric holds its Annual Convention in Estoril, Portugal, with the theme “Plug & Play: Charged for the Future?”. On the side-lines of the Annual Convention, the eurelectric Board of Directors elects **Francesco Starace, Group Chief Executive of ENEL, as eurelectric President** for a term of two years. The Board also appoints two Vice Presidents: Alistair Phillips-Davies, Chief Executive of SSE and Magnus Hall, President and CEO of Vattenfall.



eurelectric Annual Conference 2017

Avere, eurelectric, the European Copper Institute, the European Heat Pump Association, SolarPower Europe and WindEurope join forces to launch the **Electrification Alliance**. The Alliance adopts a Declaration calling for electricity to be recognised as the key energy carrier for an efficient and decarbonised European future, with has to date gained over 60 signatories.



Antonio Mexia

2017

at a glance

JULY

The Council of the European Union adopts its general approach to the Energy Efficiency Directive (EED) and the Energy Performance of Buildings Directive (EPBD). The Council agrees on a 30% energy efficiency target, but loses reference to binding or indicative.



Kirsten HASBERG

AUGUST

eurelectric publishes a study commissioned by independent experts from DNV GL which demonstrates that the European Commission's proposal on demand response aggregation can be improved to ensure its cost efficient and market based development.

SEPTEMBER

On the occasion of the European Mobility Week, eurelectric organises a "Power Talks" event on "Clean & Smart Transport: #itsElectric" with representatives from NGO, the Commission and the automotive sector. eurelectric also launches papers on the role of smart charging in unlocking the potential of electrification in transport and highlights the potential of electrification of heavy duty vehicles.

The Secretary General meets with Kadri Simson, Estonian Minister of Economic Affairs and Infrastructure, on the occasion of the high-level conference on the Clean Energy Package organised by the Estonian Presidency.

eurelectric organises a high-level event on the Clean Energy Package - "Clean Energy for all Europeans: Paving the way for the next generation". The electricity sector presents its views on how the Clean Energy Package can serve as a catalyst for further investments and more active consumers. During the conference, eurelectric presents the key findings of its report on the Commission's proposal for an emissions performance standard in capacity mechanisms.

OCTOBER

Together with Solar Power Europe, WindEurope and Orgalime, eurelectric issues a joint statement calling on policy makers to support a reliable regulatory framework for Renewables in Europe.

eurelectric signs a joint statement with ClientEarth, EFET, Europex, RAP, SEDC, SolarPower Europe and WindEurope showing strong support to strengthen a regional approach to system operation.



Krisjanis KARIŅŠ



Francesco STARACE



Kristian RUBY, Kadri SIMSON

NOVEMBER

The European Commission publishes the second part of its European Mobility Package. The Package includes new on average fleet CO2 emissions from new passenger cars and vans. eurelectric considers the level of ambition falling far short of what is required to cut emissions from transport in a 2050 perspective.

The European Parliament and Council reach provisional agreement on the post-2020 EU ETS reform. eurelectric welcomes the agreement that will strengthen the European carbon market up to 2030.

eurelectric organises, in partnership with Pöyry, the “#Energy 4.0 – When Internet meets Energy” event in London. The event is an occasion to showcase energy sector start-up companies which are using digital platforms to revolutionise the way the energy system operates.



Michael LIEBREICH

The United Nations Climate Change Conference (COP23) takes place in Bonn, Germany, under the Presidency of the Fiji Islands. eurelectric co-hosts an official side-event on the role of electricity in decarbonising transport, together with UITP and UIC.

As part of its commitment to tackle climate change, eurelectric announces **partnerships with Sustainable Energy for All and the United Nations High Commissioner for Refugees**. These partnerships will contribute to providing access to affordable, reliable, sustainable and modern energy for all, as an important part of achieving Sustainable Development Goal 7.

eurelectric, IndustriAll and ESPU, the European Social Partners in the electricity sector launch a joint statement on the Just Energy Transition, emphasising declaring its importance to facilitate actions for a sustained decarbonisation of the sector as well as the entire European economy. The Just Energy Transition is discussed at a “Power Talks” event in December.

DECEMBER

The eurelectric Presidency team hold a Press Conference in Brussels, announcing a **Vision of the European Electricity Industry**. Through the declaration the electricity sector strengthens its commitment to lead the clean energy transition and announces its goal to become carbon-neutral well before mid-century.

The Secretary General presents the new Industry Vision to Patricia Espinosa, UNFCCC Executive Secretary.

eurelectric organises “The Value of Storage for the Clean Energy Transition” conference which explores the opportunities and challenges of energy storage, not only for the power sector, but also for industry at large.



Patricia ESPINOSA, Kristian RUBY

Vision for the European Electricity Industry

On 6 December, the eurelectric Presidency team announced a new long-term Vision for the Electricity Industry in Europe.



Kristian RUBY, Magnus HALL, Francesco STARACE, Alistair PHILLIPS-DAVIES

The Vision commits the sector to accelerate the clean energy transition, taking a leading role in Europe's decarbonisation efforts towards the Paris Agreement. It includes a clear commitment to take action to support the economy-wide shift to an efficient climate-friendly society and achieve a competitive reliable carbon-neutral electricity mix in the EU well before mid-century.

With the new vision the sector strengthens its commitment to invest in clean power generation and other transition-enabling solutions and, importantly, to help accelerate CO2 emission reductions in other sectors through increasingly efficient use of clean electricity.

The rise of digital solutions and decentralised generation technologies have been centre stage in the discussions over the new vision. They are widely believed to have profound impacts on the organisation of the sector and on the relations between companies and customers.

The announcement follows a comprehensive consultation process, which engaged company CEOs and industry representatives from across Europe. The final declaration received unanimous support at its adoption, demonstrating the unwavering commitment from the power sector to play a key role in the transition to a sustainable, smart and energy efficient society.

Following the adoption of this vision declaration, the European electricity sector will launch several projects in the coming years aimed at identifying the challenges and opportunities of an accelerated clean energy transition. As the sector embarks on its journey it will engage stakeholders and communities across the entire European economy on these projects.

“ We will invest in clean power generation and transition-enabling solutions, to reduce emissions and actively pursue efforts to become carbon-neutral well before mid-century, taking into account different starting points and commercial availability of key transition technologies. ”

**VISION
FOR THE
EUROPEAN
ELECTRICITY
INDUSTRY**



our projects

Electrification

Accelerating Electrification – A Bright Future for Europe

As a key presidency priority, the theme of electrification aimed at revealing the true value of electricity has been at the forefront of eurelectric's activities in 2017.



eurelectric kick-started its Electrification campaign with a high level conference in April and the launch of our flagship report 'A Bright Future for Europe', together with its bespoke promotional video. The campaign promoted the benefits of decarbonised electricity and was amplified through several media channels.

A combination of events, social media engagement (e.g. the social media hashtag #itsElectric) and strategic partnerships, (e.g. with the Platform for Electro-mobility) ensured high impact in European policy discussions.

In June, eurelectric was instrumental in establishing the Electrification Alliance, together with Avere, the European Copper Institute, the European Heat Pump Association, SolarPower Europe and WindEurope. The Alliance launched a Declaration on Electrification that has gained more than 60 signatory companies, associations and NGOs to date.

In November, eurelectric co-hosted an official side event at the COP23 UN Climate Change Conference in Bonn, together with UITP and UIC, focusing on the role of electricity in the decarbonisation of road and rail transport.

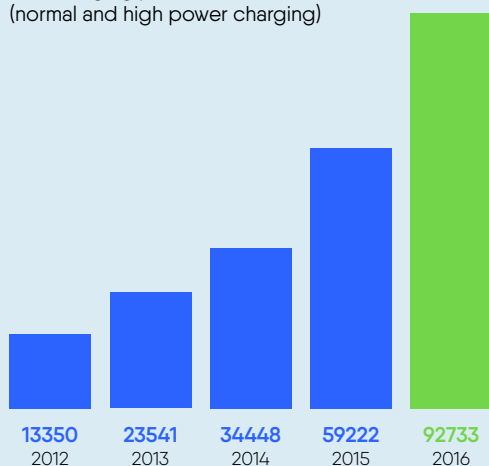
The legislative discussions under the Clean Energy Package have offered a number of key opportunities to promote electrification, including under the Energy Performance for Buildings Directive (EPBD) – EV infrastructure for buildings; as well as the Renewable Electricity Directive – RES shares in transport. The EPBD and Energy Efficiency Directive also represent critical pieces of legislation in promoting efficient electric solutions for heating and cooling (e.g. via Primary Energy Factors).

Meanwhile, eurelectric provided constructive input to both the first and the second part of the Mobility Package, published in May and November 2017 respectively. This package offers a key opportunity to revise Europe's transport legislation, considering that GHG emissions from transport in Europe are almost 20% higher today than in 1990. Together with other forward-looking stakeholders, eurelectric encouraged the European Commission to table ambitious proposals, including strict CO₂ standards for new passenger cars, and a specific support mechanism for zero-emission vehicles.

eurelectric will continue to focus on electrification as a top priority and will continue its campaign to harvest the benefits of efficient technologies and smart sector coupling.

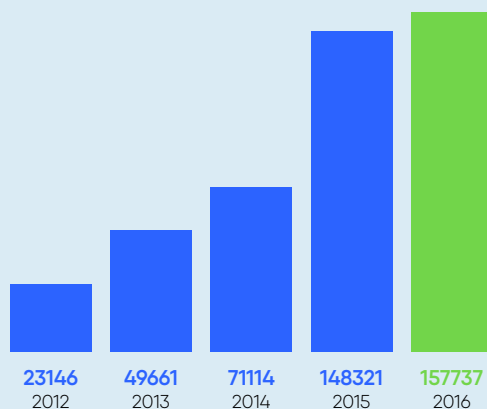
NUMBER OF EV CHARGING POINTS

PEV charging points
(normal and high power charging)



NUMBER OF EV SOLD/REGISTERED

PEV new registration across EU
(BEV and PHEV)



Source: EAFO

22%

Share of electricity
in energy
consumption

“The Future
is Electrifying
– Electricity is the
rising force among
worldwide end-uses
of energy, making up
40% of the rise in final
consumption to 2040.”

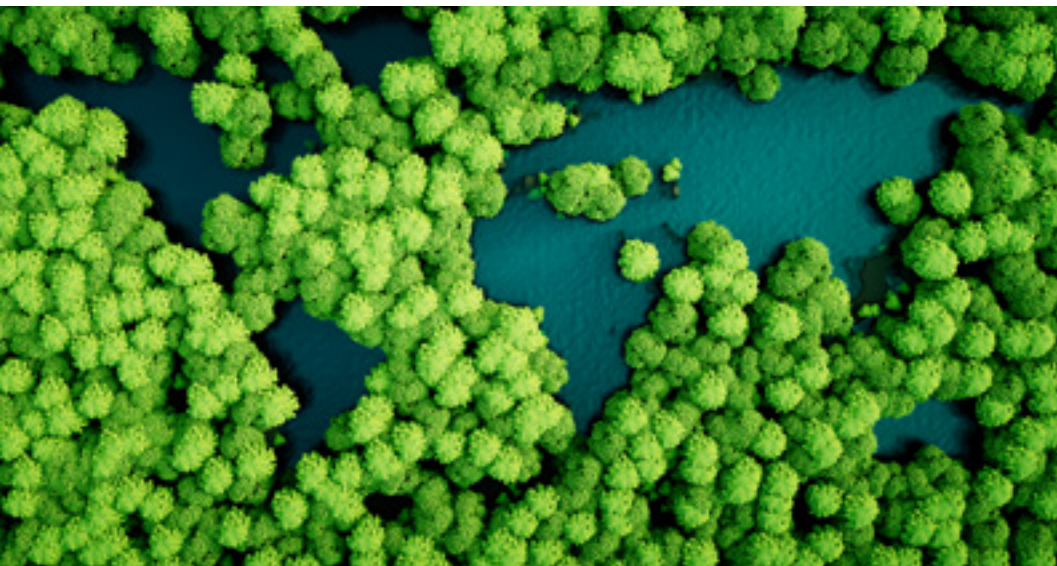
IEA World Energy Outlook 2017



Decarbonisation

Taking the lead in Europe's Clean Energy Transition

In 2017, eurelectric undertook to strengthen the electricity sector's commitment to deliver carbon neutral electricity supply in Europe, and supported a strong EU ETS that can be a key driver for market-based investments in low-carbon electricity generation.

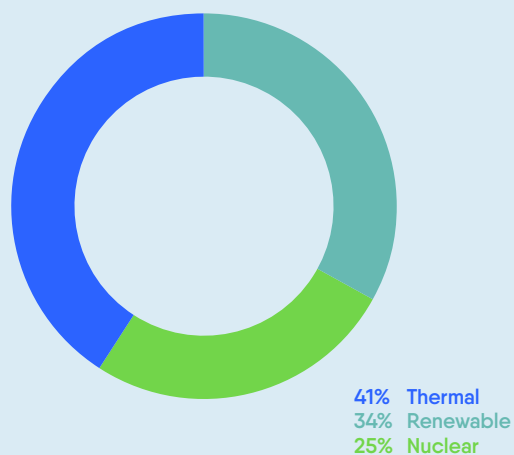


In a Vision statement adopted in November, the European electricity sector strengthened its commitment to lead the clean energy transition and announces its goal to become carbon-neutral well before mid-century.

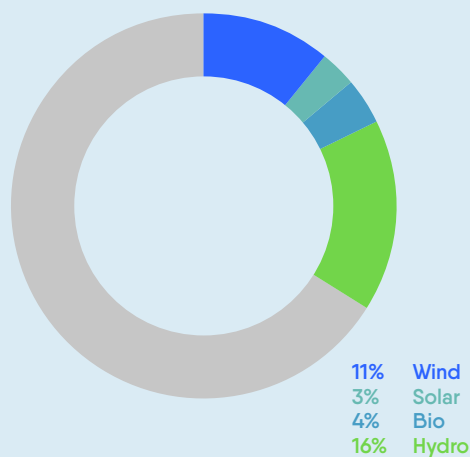
The reform of the EU ETS was a major priority this year. Following over 2 years of negotiations, EU co-legislators agreed on strengthening the ETS in line with eurelectric's key asks, in particular to increase the intake rate of the Market Stability Reserve to 24% per year from 2019 until 2023.

To secure this positive outcome eurelectric engaged in an intensive advocacy campaign, together with our members, including numerous meetings with EU Member States, MEPs and high ranking Commission officials. eurelectric also organised and engaged in several panel discussions to promoting the key findings of the ICIS Study, which was used as basis for our positions on the EU ETS.

EUROPEAN ELECTRICITY GENERATION MIX (2016)



RES GENERATION BREAKDOWN (2016)



Source: eurelectric numbers based on member input and Eurostat and ENTSO-E data.

The final deal reached by the co-legislators also includes a measure which we supported to cancel surplus allowance. eurelectric remains convinced that the Linear Reduction Factor in the ETS should be increased to at least 2.4% as soon as possible, to put the EU on a cost-effective towards meeting its Paris Agreement obligations. Additional necessary compensation to address the cost impact for Member States with a different starting point and GDP below 60% EU average should also be provided.

As we see immense potential for electricity to support the decarbonisation of the non-ETS sectors (transport & buildings) the negotiations for a new Effort Sharing Regulation and the limited flexibility mechanism with the ETS agreed by the three institutions help us remain hopeful that the role of electricity in reducing emissions from other sectors will be enabled through their electrification.

In parallel with discussions on decarbonisation policies, eurelectric deepened its engagement in ensuring that the energy transition works for all Europeans. eurelectric, IndustriAll and ESPU jointly launched the Just Energy Transition Statement calling for the mobilisation and support of all concerned stakeholders and European citizens in the energy transition.

The Social Partners have started to implement a joint project to promote the implementation of the Quality framework for traineeships in the European electricity sector. The project will identify potential skill gaps and best practices on how to train young workers, especially in the context of the ongoing decarbonisation and digitalisation of the electricity sector.

Markets

Creating Smarter and Fully Integrated European Power Markets

The Clean Energy Package (CEP) has opened the door for eurelectric to reassert its key messages on electricity market design such as market integration of RES and a regional approach to system operation.

Throughout 2017, eurelectric strengthened alliances and established new ones. We issued joint statements with ClientEarth, EFET, Europex, RAP, SEDC, Solar Power Europe and Wind Europe on “Strengthening regional approach to system operation to boost renewables’ integration”, and with Solar Power Europe, Wind Europe and Orgalime on “A reliable regulatory framework for renewable energies in Europe.”

In order to provide facts and figures to the CEP debate on the CO2 Emissions Performance Standard (EPS) in Capacity Mechanisms, eurelectric commissioned external consultants Compass Lexecon to undertake an impact assessment on this aspect of the Commission’s proposal. This study complemented eurelectric’s work on the Electricity Regulation (e.g. our position papers and advocacy documents), as well as participation at events on the CEP such as the European Energy Forum dinner on market design.

eurelectric also engaged with the Florence School of Regulation and organised an event in June, which opened the debate to gather innovative visions for the functioning of a fully decarbonised electricity market in 2050.

eurelectric continues to be actively involved in the Market European Stakeholder Committee (MESC). The MESC is a platform for stakeholders to express their views and receive feedback about the implementation process, as well as to discuss proposals for amendments to the market guidelines. eurelectric is also actively involved in existing stakeholder groups who oversee the early implementation projects in connection to the market guidelines.

Market related guidelines, will effectively shape the operation of the European energy sector in years to come. eurelectric has been very

active in providing input to a large number of formal and informal stakeholders consultations launched by TSOs, NRAs, ACER, and the European Commission. When possible, we have strived to do this jointly with other associations in order to increase our influence and impact.

In the same way, eurelectric participated in the European Commission’s expert group on interconnection targets, which released its report in November. This report will help ensure the cost-efficient development of interconnection projects in Europe. eurelectric has also continued its monitoring and influencing the legislative files on financial regulation and gas to power issues affecting the business.

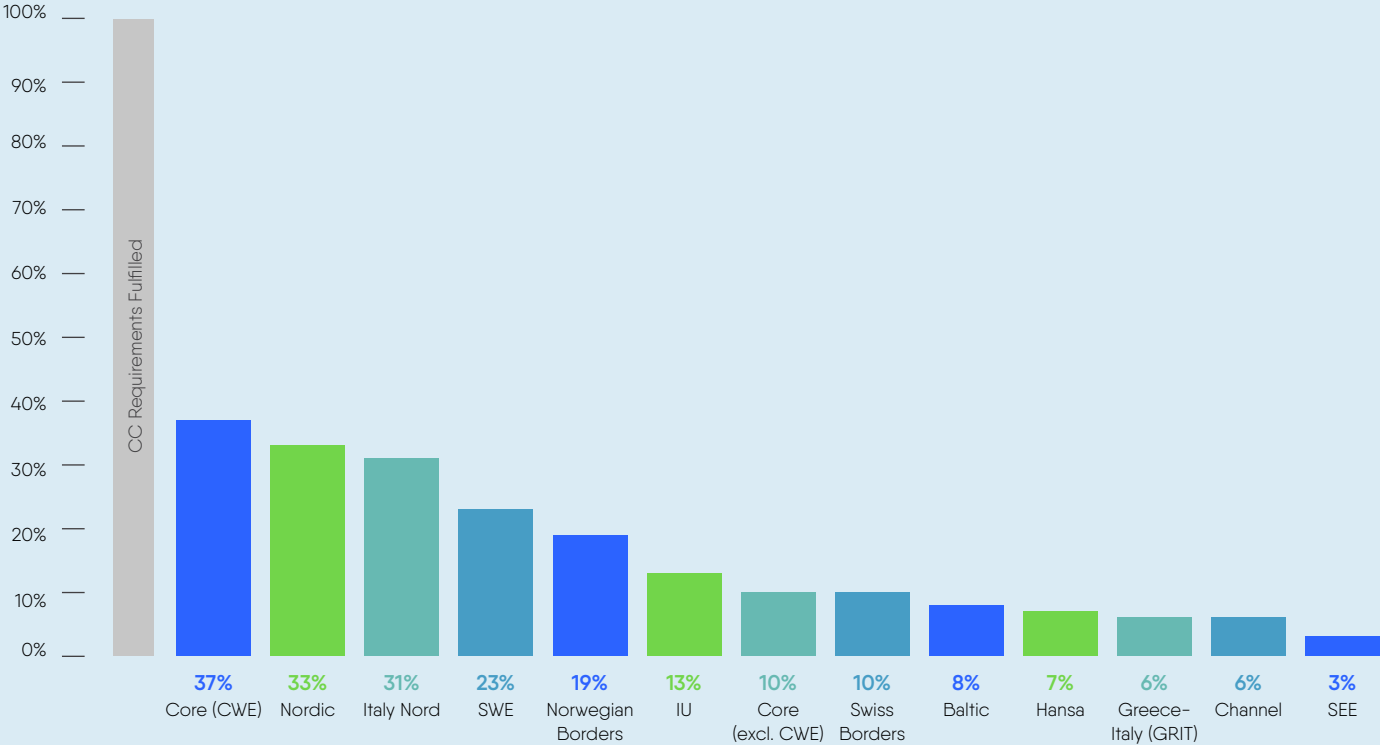
In 2017 eurelectric set up a dedicated Working Group on Brexit, a platform to discuss the possible impacts of Brexit on the European electricity industry, and to analyse technical consequences. The Working Group undertook several actions including an introductory letter to EU Chief negotiator, Michel Barnier, a meeting with Taskforce 50 in April, as well as a number of papers aimed at informing the discussions on the UK’s future relationship with the Internal Energy Market and ensuring that the mutual benefits of free and fair trading of electricity between both parties can be maintained. Given the crucial importance of energy for both economies, eurelectric believes that cooperation between the UK and the EU on energy matters should continue to be aligned as closely as possible.



CROSS-ZONAL CAPACITY LEVELS IMPROVEMENT NEEDED FOR MARKET INTEGRATION

REGIONAL PERFORMANCE BASED ON FULFILMENT OF CACM
CAPACITY CALCULATION REQUIREMENTS, 2016

Source: ACER Market Monitoring Report 2017



“The limited amount of cross-zonal capacity made available for trading by TSOs is one of the most significant barriers to further market integration in Europe.”

2016 ACER Market Monitoring Report

Consumers

Empowering Consumers in a Digital Energy Future

eurelectric's work in 2017 on Consumers was unsurprisingly dedicated to elaborating and promoting our position in the Clean Energy Package (CEP) towards the European institutions. It was also a rich year for the Retail Committee in terms of delivery of report, publications and events.



With numerous papers on the CEP itself, eurelectric's Retail Customers team published glossy reports on energy poverty and aggregation as well as a new infographic on the electricity bill to support our positions with key facts and figures. The latter was particularly useful in raising awareness among policymakers about what really drives up the consumer bill, and revealing how the current retail price structure hampers both electrification and demand response.

Animated videos were produced and shown in several conferences to effectively convey our messages on retail pricing and energy poverty in a didactic and user-friendly way. eurelectric was a driving force behind the elaboration of a Joint Statement on Demand Side Flexibility, with European associations EFET and Europex. The statement calls for all types of demand response to comply with common market rules and to compete on a level playing field with other market participants.



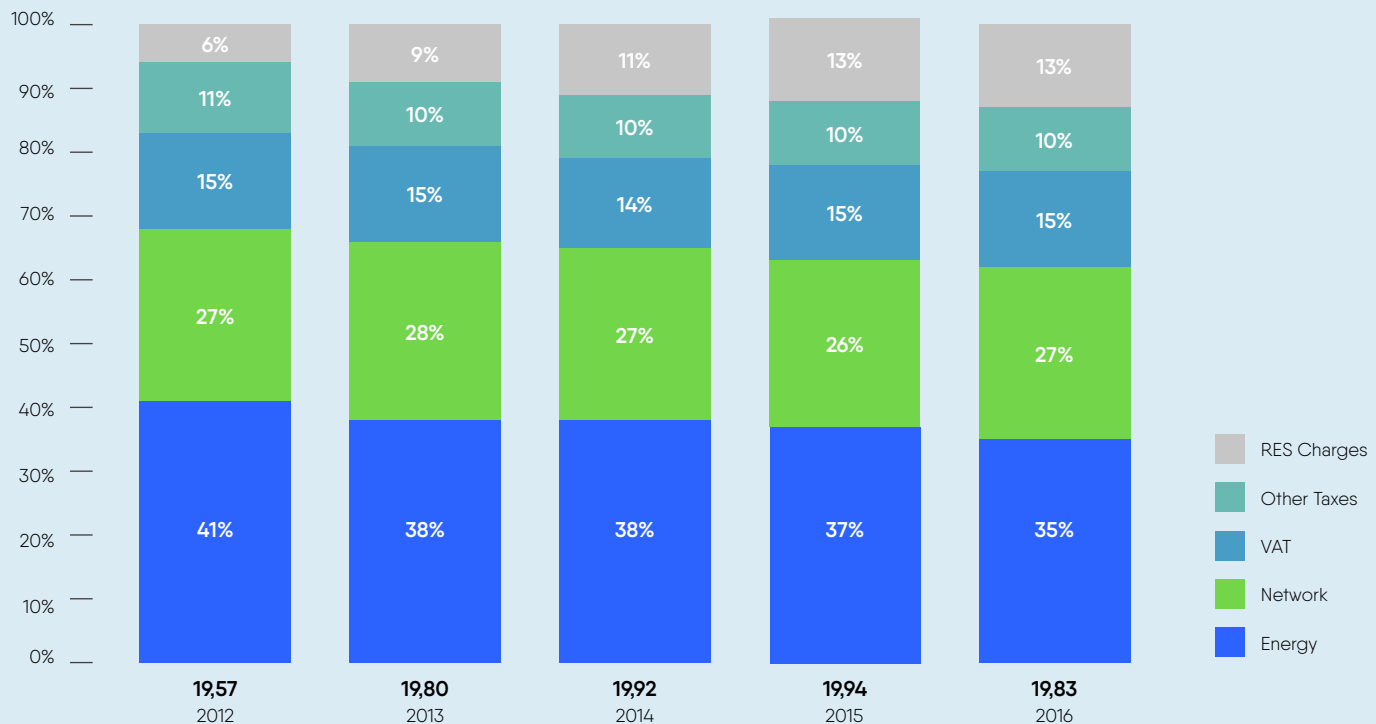
Last but not least, a number of events were organised around the theme of retail markets, notably a dinner jointly prepared with the European Energy Forum (EEF) in November, in the European Parliament in Strasbourg. The dinner was chaired by MEP Jerzy Buzek, Chair of ITRE Committee. Antonio Coutinho, Chair of eurelectric's Retail Committee, debated key provisions of the Electricity Directive with Monika de Volder from the European Consumer Organisation, BEUC, in front of several key ITRE Committee MEPs.

“Bringing down policy support costs in the electricity bill to reduce pressure on electricity consumers and drive cost-effective electrification.”

2017, eurelectric, A Bright Future for Europe

WEIGHTED AVERAGE FINAL ELECTRICITY PRICE BREAKDOWN OF EU HOUSEHOLD ELECTRICITY BILL

Source: ACER Market Monitoring Report 2017



Distribution

Promoting DSO innovation in Europe's energy transition



With new Co-Chairmen at the helm and a new strategic vision set for DSOs in Europe – “Pipes to Platforms” – the DSO Unit at eurelectric saw a year of intense rejuvenation and revitalisation.

The publication of the European Commission's Clean Energy Package opened a number of avenues to raise the profile of Distribution System Operators and their role in Europe's energy transition.

eurelectric embraced this challenge through a number of initiatives:
We successfully pushed for membership of the proposed EU DSO Entity to be opened up to all DSOs in Europe.

We delivered a valuable contribution to the debate on flexibility in Europe. This resulted in unique cooperation among members from all European DSO Associations, guided carefully to completion by a eurelectric member.

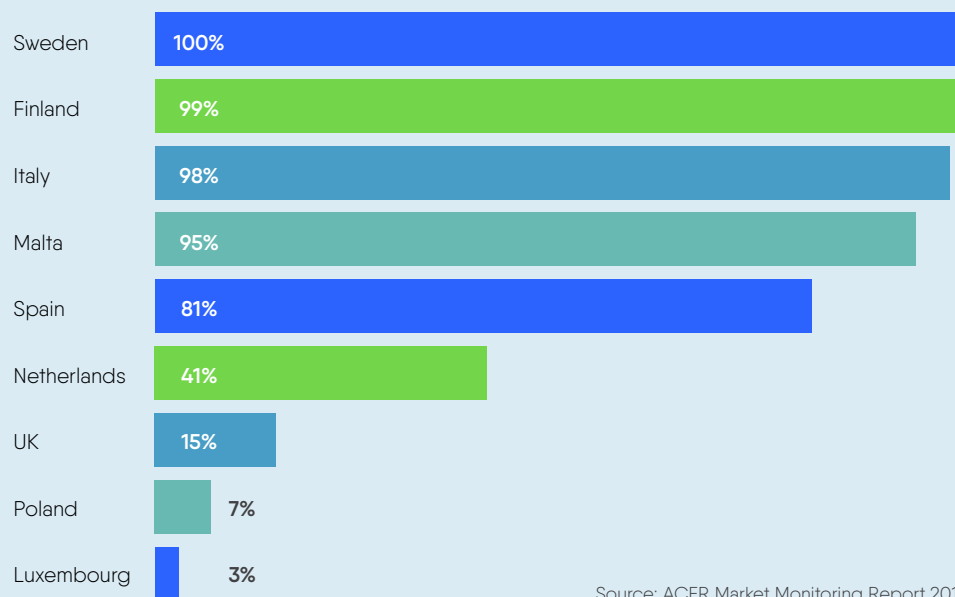
eurelectric also stepped up its engagement with key stakeholders, such as the Council of

European Energy Regulators (CEER), where we presented our members' views on innovation investment frameworks and Local Energy Communities.

Our members have also benefited from reinforced coordination on implementation issues such as Network Codes. In the area of standardisation, eurelectric published input for the review of the Eco-Design Directive and identified new areas of value for members following a review of our CENELEC partnership.

eurelectric also launched a comprehensive analysis of distribution network charges for generation including prosumers, electric vehicles and storage, and their effect on DSO revenues and grid user behaviours. In light of an accelerating trend towards self-generation, eurelectric will publish its views on this in mid 2018.

Approx.
25%
of household
consumers across
Europe equipped
with a smart meter



Source: ACER Market Monitoring Report 2016

“We successfully
pushed for
membership of
the proposed EU DSO
Entity to be opened
up to all DSOs in
Europe.”



Innovation

Discovering cutting-edge business models and breakthrough technologies



The digitalisation of energy and its interaction with regulation and policy frameworks were at the core of eurelectric's activities on Innovation in 2017.

eurelectric launched 'POWER 4.0', its own innovation platform, with its first two workshops attracting EU experts on innovation policies and regulatory incentives for DSO innovation.

eurelectric also launched the eurelectric Blockchain Platform, a further flagship initiative on innovation, which kicked-off its work during the summer. The Platform's main objective is to explore the business value and customer benefits that blockchain and distributed ledger technologies could unlock in the future energy system.

The Platform provides representatives of European utilities and start-ups a space to engage in critical discussions on the potential

of the technology as well as highlight to relevant stakeholders areas where future policy and regulatory attention will be needed. In November, eurelectric published an interim report which analysed blockchain use cases in electro-mobility and evaluated possible developments could be anticipated as a result of blockchain deployment.

This new initiative builds on the digitalisation issues explored during eurelectric's 2017 Annual Convention, where Artificial Intelligence, the Internet of Things and automation were fervently debated. The discussions also explored the potential of blockchain technology, including whether it would bring incremental innovation in certain niche applications only, or whether it has the potential to facilitate disruptive forces in the entire energy landscape.

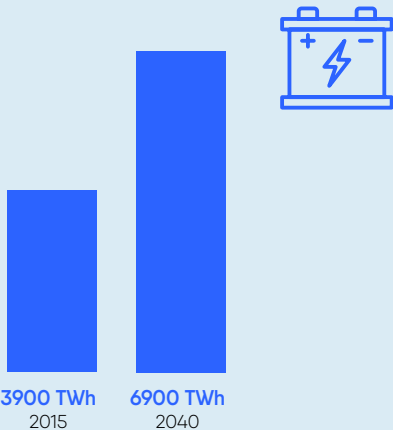
eurelectric also strengthened its partnership with its Business Associate Pöyry, by co-hosting a conference in London in November. The event, "#Energy4.0: When Internet Meets Energy", brought together 180 attendees for a debate on the implications of the digitalisation of the energy sector. It aimed at showcasing some of the most innovative business models and mapping their potential against the big picture scenarios embraced by leading international institutions, organisations and energy companies.

FOUR KEY ELEMENTS IN THE CREATION OF A DIGITALLY INTERCONNECTED ELECTRICITY SYSTEM

Source: Analysis based IEA (2016; 2017d)

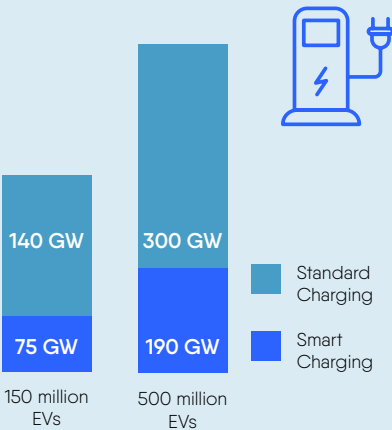
WORLDWIDE

DEMAND RESPONSE POTENTIAL

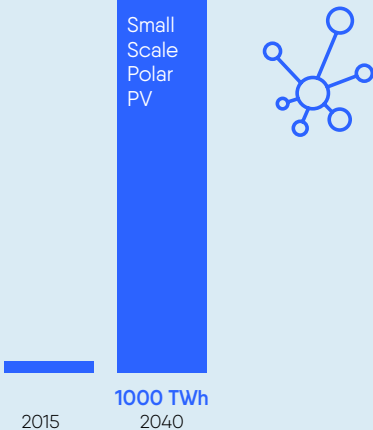


EV SMART CHARGING

Capacity Generation Requirement

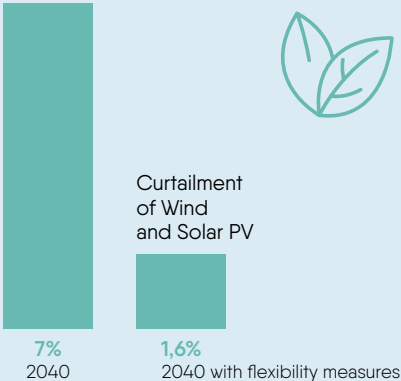


DISTRIBUTED GENERATION AND PROSUMERS



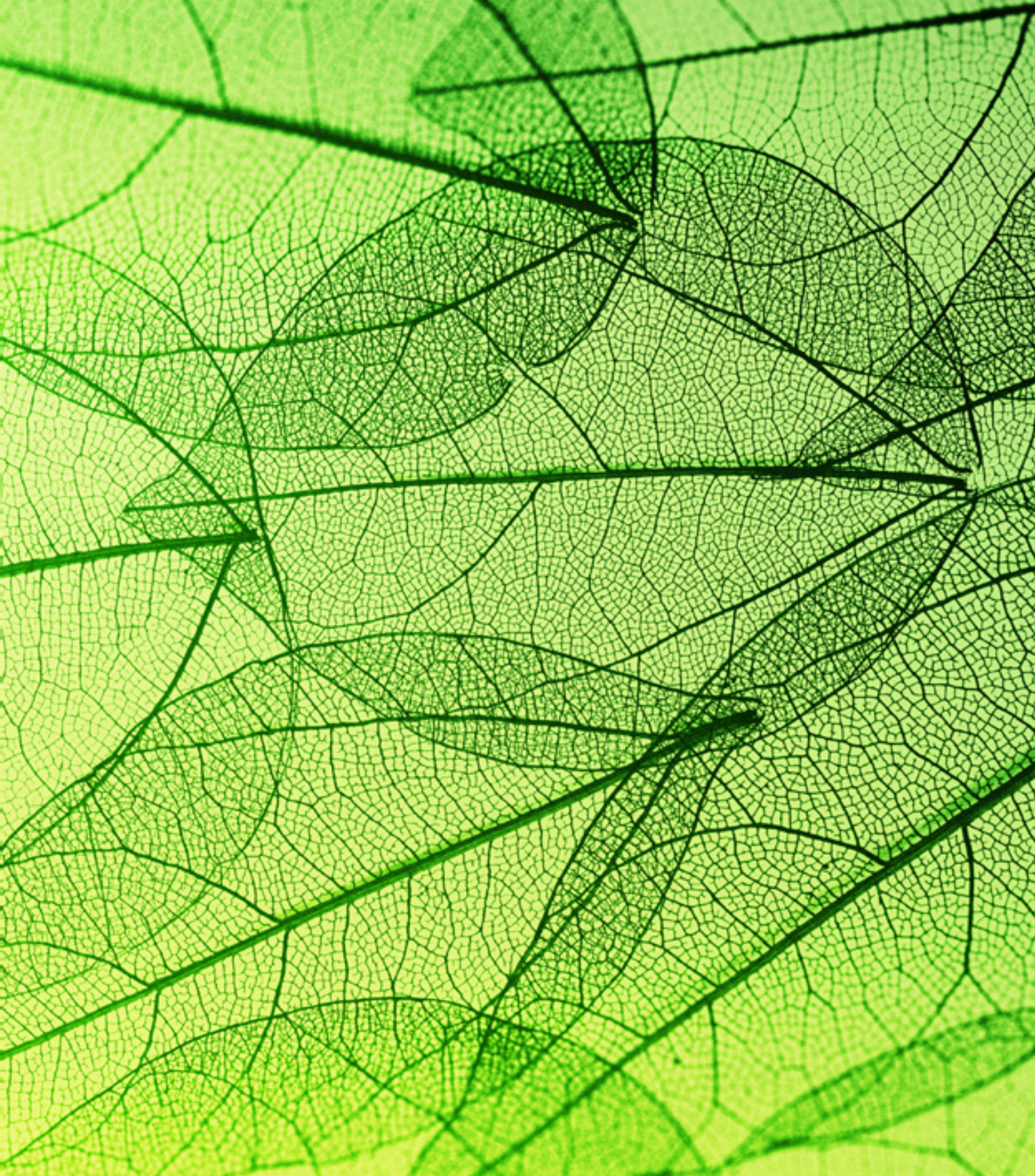
EUROPEAN UNION

VARIABLE RENEWABLES INTEGRATION



The electricity sector is ripe for realizing value from rapid digital transformation; we estimate that there is \$1.3 trillion of value to be captured globally, from 2016 to 2025”

World Economic Forum, Digital Transformation of Industries – Electricity Industry, 2016





sustainability

Sustainability

Embedding Sustainability throughout our value chain

The electricity system is living an unprecedented transformation and its resilience on current and future markets will also depend on its ability to be sustainable. As of 2017, eurelectric renewed its engagement towards sustainability. This will increase awareness among members and other stakeholders, of our sector's commitment towards the adoption of sustainable business models, in the context of working towards the achievement of the United Nations Sustainable Development Goals.

With the re-organisation of eurelectric's internal structure in October, Sustainability has been given increased prominence in our everyday work. It has been streamlined through the policy areas introducing the figures of an Energy Policy, Climate & Sustainability Manager, a Sustainable Development, Social Dialogue, Access to Energy Advisor as well as a Sustainability Advisor within the Corporate Affairs team.

Electricity brings direct benefit to present and future society and at the same time, is a key driver for sustainable innovation in other sectors. In light of the global agenda and increased EU commitment towards sustainable development, eurelectric will integrate several initiatives devoted to sustainability throughout 2018, building on existing projects and fostering new activities.



In 2017 eurelectric, IndustriAll and ESPU have jointly launched the Just Energy Transition Statement. European Social Partners in the electricity sector recognise the need for rapid and coherent action to decarbonise the economy to tackle climate change and its negative impacts on environment, society and economy.

As part of its commitment to the climate change challenge, in 2017, eurelectric entered into partnerships with Sustainable Energy for All and the United Nations High Commissioner for Refugees. These partnerships will contribute to providing access to affordable, reliable, sustainable and modern energy for all, as an important part of achieving Sustainable Development Goal 7.

Our sector fully believes that access to sustainable energy is a key prerequisite to combating poverty and fostering growth in developing countries. Improving access to clean electricity means bringing energy independence and security to vulnerable people, while also providing an important tool in the battle against climate change.





Ivo SCHMIDT, Kristian RUBY, Jan Willem GOUDRIAAN, Luc TRIANGLE







annexes

eurelectric

Full Member Organisations



Austria
Österreichs E-Wirtschaft



Belgium
Fédération Belge des Entreprises Electriques et Gazifères (FEBEG)
/ Federatie van de Belgische Elektriciteits- en Gasbedrijven (FEBEG)



Bulgaria
Energy Management Institute



Croatia
Croatia eurelectric Section – Croatian Chamber of Economy



Cyprus
Electricity Authority of Cyprus



Czech Republic
Český Svaz Zamestnavatelů v Energetice (CSZE)



Denmark
Dansk Energi



Estonia
The Union of Electricity Industry of Estonia



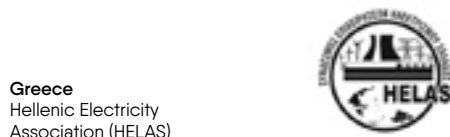
Finland
Energiateollisuus ry



France
Union Française de l'Electricité (UFE)



Germany
Bundesverband der Energie- und Wasserwirtschaft e.V. (BDEW)



Greece
Hellenic Electricity Association (HELAS)



Hungary
eurelectric Magyarországi Tagozat



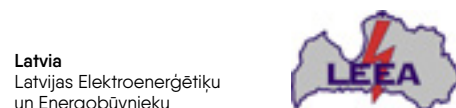
Iceland
Samtök Raforku-, Hita- og Vatnsveitna (SAMORKA)



Ireland
Electricity Association of Ireland (EAI)



Italy
Eletticità Futura



Latvia
Latvijas Elektroenerģētiku un Energobūvnieku Asociācija (LEEAA)



Lithuania
Nacionalinė Lietuvos Energetikos Asociacija (NLEA)



Luxembourg
Organisation des Entreprises d'Electricité du Luxembourg



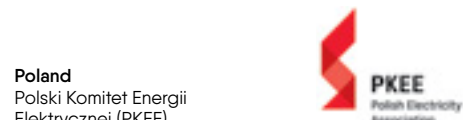
Malta
Enemalta plc



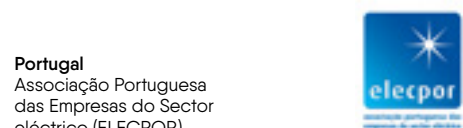
The Netherlands
Vereniging Energie-Nederland
Netbeheer Nederland



Norway
Energi Norge



Poland
Polski Komitet Energii Elektrycznej (PKEE)



Portugal
Associação Portuguesa das Empresas do Sector eléctrico (ELECPOR)

Romania
Institutul Național Român
pentru Studiul Amenajării
și Folosirii Surselor de
Energie (IRE)



Slovakia
Zväz zamestnávateľov
energetiky Slovenska
(ZZES)



Slovenia
Slovenian Chamber
of Commerce, Energy
Association, eurelectric
Section



Energetska
zbornica
Slovenije

Spain
Asociación Española
de la Industria
Eléctrica (UNESA)



Sweden
Energiföretagen Sverige
- Swedenergy AB



Switzerland
Verband Schweizerischer
Elektrizitätsunternehmen (VSE)
Association des Entreprises
Électriques Suisses (AES)



Turkey
Türkiye Elektrik Sanayi
Birliği (TESAB)



United Kingdom
Energy UK
Energy Networks Association (ENA)

EUROPEAN AFFILIATE MEMBERS

Belarus	Belenergo
Bosnia-Herzegovina	Elektroprivreda Bosne i Hercegovine
Russia	NP Market Council
Serbia	Electric Power Industry of Serbia
United Kingdom	Jersey Electricity Company Ltd.

MEDITERRANEAN AFFILIATE MEMBERS

Algeria	Société Nationale de l'Electricité et du Gaz (SONELGAZ)
Egypt	Egyptian Electricity Holding Company
Israel	The Israel Electric Corporation Ltd.
Morocco	Office National de l'Electricité (ONE)

INTERNATIONAL AFFILIATE MEMBERS

Japan	Central Research Institute of Electric Power Industry (CRIEPI)
Kazakhstan	Kazakhstan Electricity Grid Operating Company (KEGOC)

EI ASSOCIATES

France	Compagnie Nationale du Rhône (CNR)
Switzerland	Alpiq Suisse SA
Switzerland	BKW/FMB Energie AG
Switzerland	Groupe E
Switzerland	Services Industriels de Genève

BUSINESS ASSOCIATES



Accenture



DNV GL



DTEK



EPEX Spot SE



Ernst & Young



FTI Compass Lexecon



Fugro Roames



Geln Dimplex



IBM



Itron



Landis + Gyr AG



Oracle



Ormazabal



Pöry Management
Consulting



Pricewaterhouse Coopers



Tesla (Europe) Ltd



Wärtsilä Corporation

Information as of 31 December 2017

eurelectric

Board of Directors

President	Francesco STARACE Chief Executive Officer/General Manager of Enel SpA
Vice President	Magnus HALL President & CEO of Vattenfall AB Alistair PHILLIPS-DAVIES CEO of SSE
Secretary General	Kristian RUBY

	MEMBER	SUBSTITUTE
Austria	Wolfgang ANZENGRUBER CEO, VERBUND AG	Barbara SCHMIDT Secretary General, Oesterreichs Energie
Belgium	Marc VAN DEN BOSCH Director General, Fédération Belge des Entreprises Electriques et Gazières asbl (FEBEG) / Federatie van de Belgische Elektriciteits- en Gasbedrijven (FEBEG)	
Bulgaria	Slavtcho NEYKOV Chairman of the Management Board Energy Management Institute EMI	Karel KRAL CEO & Country Manager at CEZ Bulgaria CEZ Bulgaria EAD
Croatia	Frane BARBARIC President of the Management Board, Croatian eurelectric Section - Croatian Chamber of Economy	Helena BOZIC Director of EU and Regulatory Affairs Department Croatian Chamber of Economy
Cyprus	Tassos GREGORIOU Manager Distribution System Operator Electricity Authority of Cyprus	
Czech Republic	Zuzana KREJCIRIKOVA Director of Public Affairs of WG Energy Policy, Manager of European Affairs CEZ a.s.	Lucie HOROVA Head of eurelectric section Cesky Svaz Zamestnavatelů v Energetice (CSZE)
Denmark	Lars AAGAARD CEO, Dansk Energi	Anders STOUGE Deputy Director General, Dansk Energi
Estonia	Hando SUTTER Chairman of the Management Board Eesti Energia AS / Elektritööstuse Liit	Andres SUTT Member of the Board of Eesti Energia, Union of Electricity Industry of Estonia
Finland	Jukka LESKELA Managing Director Finnish Energy	Joona TURTIAINEN Head of EU Affairs Finnish Energy
France	Christine GOUBET-MILHAUD President, Union Française de l'Electricité (UFE)	
Germany	Leonhard BIRNBAUM Member of the Board of Management of E.ON SE	Stefan KAPFERER Chair of the Executive Board, Bundesverband der Energie- und Wasserwirtschaft e.V. (BDEW)
Greece	George ANDRIOTIS Chairman Hellenic Electricity Association (HELAS)	Emmanuel PANAGIOTAKIS Chairman and CEO, Public Power Corporation S.A.
Hungary	István BAKACS President, eurelectric Magyarországi Tagozat (EMT)	Zsolt JAMNICZKY Member of the Board of Directors, E.ON Hungária Zrt.
Iceland	Páll ERLAND Managing Director, Icelandic Energy & Utilities (SAMORKA)	

	MEMBER	SUBSTITUTE
Ireland	Patrick O'DOHERTY Chief Executive, Electricity Supply Board (ESB)	Dara LYNOTT Chief Executive, Electricity Association of Ireland – EAI
Italy	Roberto POTI Vice President Elettricità Futura, Elettricità Futura, imprese elettriche italiane	Stefano Antonio DONNARUMMA CEO, ACEA S.p.A.
Latvia	Aris ZIGURS Chairman of the Management Board & CEO, Latvenergo	Maris KUNICKIS Member of the Management Board & Chief Operating Officer, Latvenergo
Lithuania	Mr. Mindaugas KEIZERIS Strategy and Development Director Lietuvos Energija, UAB	
Luxembourg	Jean LUCIUS CEO & Chairman of the Executive Committee, Encevo S.A.	Paul ZEIMET Secrétaire Général, Société Électrique de l'Our SA – SEO
Malta	Fredrick AZZOPARDI Chairman, Enemalta plc	Jason VELLA Chief Executive Officer, Enemalta plc
Norway	Oluf ULSETH CEO, Energi Norge	Knut KROPELIEN Executive Director Markets and Customers, Energy Norway
Poland	Marta GAJECKA Vice-President of PKEE, Vice CEO of PGE Renewables PKEE – Polski Komitet Energii Elektrycznej	Remigiusz NOWAKOWSKI Vice-President of PKEE PKEE – Polski Komitet Energii Elektrycznej
Portugal	Joao MANSO NETO CEO EDP Renovaveis, EDP Energias de Portugal	João Nascimento BAPTISTA Executive Director General, Associação Portuguesa das Empresas do Sector, Eléctrico (ELECPOR)
Romania	Catalin STANCU General Director Electrica SA	Teodor-Ovidiu POP General Manager Verbund – President of IRE, Romanian Institute for Energy Development Studies (IRE)
Slovakia (Slovak Republic)	Branislav STRÝČEK Member of the Board of Directors and Trade, Regulation and Production Optimization Director of Slovenské elektrárne, a.s., Slovenské elektrárne, a.s.	
Slovenia	Ivan SMON Vice-President ELEKTRO GORENJSKA, D.D	Joze SPILER Manager – Technical Division Gen Energija d.o.o
Spain	Marina SERRANO President, Asociación Española de la Industria Eléctrica (UNESA)	Ángel Luis VIVAR Director of Energy Policy & Sustainable Development, Asociación Española de la Industria Eléctrica (UNESA)
Sweden	Pernilla WINNHED Managing Director Energiföretagen – Swedenergy AB	Daniel WENNICK Head of Brussels Office – Director International Affairs, Energiföretagen – Swedenergy AB
Switzerland	Mr. Michael WIDER Chairman, Verband Schweizerischer Elektrizitätsunternehmen (VSE) / Association des Entreprises Electriques Suisses (AES)	Michael FRANK Managing Director, Verband Schweizerischer Elektrizitätsunternehmen (VSE) / Association des Entreprises Electriques Suisses (AES)
The Netherlands	Medy VAN DER LAAN President, Energie-Nederland André JURJUS Managing Director, Netbeheer Nederland	Janine VERWEIJ Director, Energie-Nederland Kirsten WILKESHUIS Advisor Strategy & Public Affairs, Netbeheer Nederland
Turkey	Nevzat SATIROGLU Chairman of the TESAB Executive Board Türkiye Elektrik Sanayi Birligi (TESAB)	Fahrettin Amir ARMAN General Manager, AYEN Energy Company
United Kingdom	David SMITH Chief Executive Energy Networks Association (ENA) Lawrence SLADE Chief Executive Energy UK	Paul FIDLER Director of Operations and SHE, Energy Networks Association (ENA) Marta KRAJEWSKA Chair of WG Thermal & Nuclear Energy UK

eurelectric

Structure of Expertise

ENERGY POLICY AND GENERATION



Chair
Oluf ULSETH (NO)



Vice Chair
Michel MATHEU (FR)



WG Renewables
Viola ROCHER (DE)



WG Hydro
Otto PIRKER (AT)



WG Thermal & Nuclear
Gwyn DOLBEN (UK)



WG Innovation (H)*
Javier ALONSO MARTINEZ (ES)



TF CCS (Acting Chair)
Gwyn DOLBEN (UK)

MARKETS



Chair
Juan José ALBA RIOS (ES)



Vice Chair
Alain JANSSENS (BE)



WG Market Integration & Network Codes
Hélène ROBAYE (BE)



WG Financial Regulation & Market Integrity
Bernhard WALTER (DE)



WG Wholesale Market Design
Pavel MILLER (UK)



TF eurelectric Cooperation with Russia/CIS
Mats PERSSON (SE)



WG Gas to Power (H)*
Cyril HARRY (FR)

DSO



Co-Chair
Julio CASTRO (ES)



Vice Chair
Erik LANDECK (DE)



WG Active Distribution System Management
Maximilian URBAN (AT)



WG Distribution Customers
Lowina LUNDSTRÖM (SE)



Francesco STARACE
President (IT)



Alistair PHILLIPS-DAVIES
Vice President (UK)



Magnus HALL
Vice President (SE)



Kristian RUBY
Secretary-General (DK)



Co-Chair
Knud PEDERSEN
(DK)



Vice Chair
Richard VIDLICKA (CZ)



WG Distribution
Regulation & Policy **Sophia
POLITOPOULOU** (GR)



WG Standardisation
Giovanni VALTORTA (IT)

ESDP



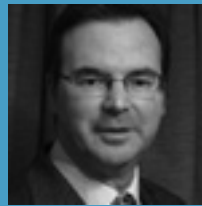
Chair
**Giuseppe
MONTESANO** (IT)



WG Climate Change
Anne BOLLE (NO)



WG By-products,
Residues & Wastes
**Fernando Manuel CALDAS
VIEIRA** (PT)



Vice Chair
David ACRES (UK)



WG Environmental
Protection
Martin RUHRBERG (DE)



WG Energy & Resource
Efficiency
Philippe BAUDUIN (FR)

RETAIL CUSTOMERS



Chair
**Antonio José
COUTINHO** (PT)



WG Commercial
Processes & Customer
Relationship
Roel KALJEE (NL)



WG Electro-mobility
Elias PÖYRY (FI)



Vice Chair
Monica IMMOVILLI
(IT)



WG Retail Market
Design
Alain TACCOEN (FR)

BCA GROUPS*

WG BREXIT
WG Health, Safety & Environment
TS SF6
Ad hoc group Neighbourhood: Energy
Community and MENA

SECRETARIAT GROUPS

NE Business Data
NE Network Codes
NE Islands System Managers
NE Access to Electricity
WG European Social Dialogue

* BCA: Board, Coordinating
Committee Active
* (H): Horizontal

Information as of 31 December 2017

eurelectric

Staff



Kristian RUBY
Secretary General



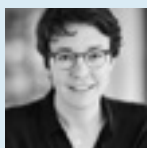
Anne-Marie REGO
Board, Governance &
International Relations



Annick ERKENS
PA to Secretary General



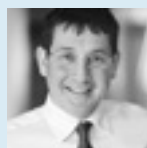
Koen NOYENS
Director, Communication
& Corporate Affairs



Marion LABATUT
Director, Policy Issues



Marc DENYS
Director, Finance,
Administration & IT

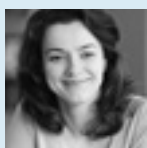


Fergal McNAMARA
Principal Advisor
DSO Issues

ENERGY POLICY, CLIMATE & SUSTAINABILITY



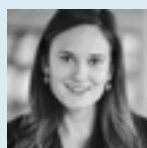
Henning HÄDER
Manager, Energy Policy,
Climate & Sustainability



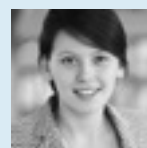
Hélène LAVRAY
Senior Advisor, Renewables
& Environment, Public
Affairs Coordination



Krzysztof LASKOWSKI
Advisor, Climate



Lisa WOLF
Advisor, Electromobility



Anna DIMITROVA
Advisor, Energy Policy &
Innovation



Gilda AMOROSI
Advisor, Energy
Efficiency & Generation

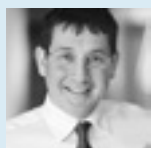


Martin SCHÖNBERG
Advisor, Hydro Power



Brigitte FRANCÉ
Assistant, Energy Policy,
Climate & Sustainability

DISTRIBUTION SYSTEM OPERATORS



Fergal McNAMARA
Coordinator, DSO Issues



Carolina VEREDA
Advisor, Institutional
Arrangements
TSO Cooperation



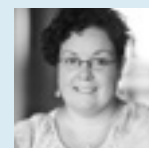
Sanni AUMALA
Advisor, Network Codes
Standards



Christoph GRÄFE
Advisor, Active
Distribution System
Management



Giuseppina RONDINELLI
Advisor, Distribution
Customers
Distribution Regulation
& Policy

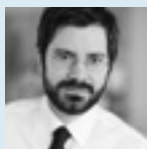


Nathalie HAESEVOETS
Assistant, Distribution
System Operators

MARKETS & CUSTOMERS



Charlotte RENAUD
Manager, Wholesale &
Retail Markets



Sébastien DOLIGÉ
Senior Advisor, Retail Markets
Public Affairs Coordination



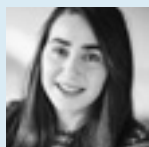
Rabia IKRAM
Advisor, Brexit
& Sustainable
Development, Social
Dialogue, Access to
Energy



Blandine MALVAULT
Advisor, Wholesale
Markets
Gas to Power
Financial Regulation &
Market Integrity



Ioannis RETSOULIS
Advisor, Wholesale
Markets & Network Codes



Anna ASLANIDZE
Advisor, Retail Markets

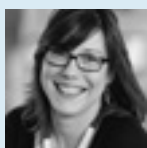


Emma-Louise BEDFORD
Assistant, Markets &
Customers

STRATEGIC COMMUNICATION



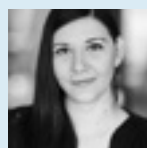
Karl VELLA
Manager, Strategic
Communication



Gaël GLORIEUX
Senior Advisor, Strategic
Communication

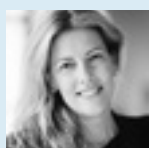


Anamaria OLARU
Advisor, Press & Media
Relations



Evgeniya NIKOLOVA
Web & Graphic Designer

CORPORATE AFFAIRS



Raquel MENDES
Coordinator,
Corporate Affairs



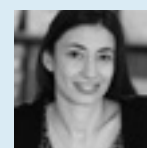
Emily O'LEARY
Senior Advisor, Events



Adélaïde BOODTS
Communication
& Corporate
Partnerships Officer



Ann STRZELCZYK
Corporate Affairs Officer

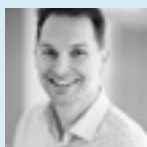


Valentina SPINA
Advisor, Sustainability

IT & LOGISTICS



Romain JOURDAN
Senior IT Advisor, Web
Applications



Diego NOMEN
Senior IT Advisor, Network
Administration



Geoffrey LADEUZE
Administration &
Logistics Assistant

FINANCE & ADMINISTRATION



Michèle DUBOIS
Manager, Finance &
Administration



Carine BUSARD
Accounting Assistant



Charlotte MCGILL
Administration Assistant




Information as of 31 December 2017





Union of the Electricity Industry – eurelectric

Boulevard de l'Impératrice, 66 – bte 2
B – 1000 Brussels – Belgium
Tel: + 32 2 515 10 00

 twitter.com/eurelectric
 linkedin.com/company/eurelectric
 www.eurelectric.org

EU Transparency Register number: 4271427696-87