

# ACTIVITY REPORT

2011 • 2012



THE EUROPEAN UNION OF THE NATURAL GAS INDUSTRY

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# President's Message



*Gas is being rediscovered. Eurogas is ready to guide our members through this new and challenging era, working together with them to change the energy system of today. For a better tomorrow. For all of us.*

Last summer, the International Energy Agency made a strong case for “a golden age of gas” when it released a special report highlighting a positive future outlook for gas. The European Commission confirmed that gas will be critical for transforming the energy system when it published the Energy Roadmap 2050.

Consumers also expressed their faith in gas with one million new customers opting for gas across the whole of Europe in 2011. The extraordinary spell of cold weather affecting large parts of both Europe and Russia in early 2012 has also shown that the energy market is robust. With very few exceptions, both gas and electricity customers continued to be supplied at sufficient levels.

But where there is light, there is also shadow. During 2011/2012 Eurogas and its members were confronted with a triple challenge. Firstly, sluggish economic growth affected gas sales. Secondly, energy policy both at the level of the EU and Member States created uncertainty about the future of gas. So has, thirdly, the absence of a reliable climate policy that should provide a level playing field for all low-carbon technologies.

“An 80% reduction of GHG emissions, compared with 1990, can be achieved competitively in a flexible approach with energy efficiency, gas and renewables going hand in hand.”

Globally, gas is being rediscovered as a fuel of choice, due to its availability, flexible use and advantageous environmental properties. In Europe, this process is slower. For this reason, Eurogas joined forces with other gas associations for the GasNaturally campaign, to highlight the strengths of gas to our EU stakeholders.

The *Eurogas Roadmap 2050*, published in October 2011, showed that an 80% reduction of greenhouse gas (GHG) emissions, compared with 1990, can be achieved competitively in a flexible approach with energy efficiency, gas and renewables going hand in hand.

In its response to the Commission's Energy Roadmap 2050, published in December 2011, Eurogas provided clear guidance on an energy and climate policy focused on reducing GHG emissions at the lowest cost at all times, driven by markets and price signals.

Such a policy should help overcome the current paradoxical situation in which emission reductions achieved by energy efficiency and renewables are partially offset by inefficient plants using higher carbon fuels in the face of a low carbon price. The desired investment in gas infrastructure will strongly depend on making targets and measures more consistent in the future.

Security of gas supply and competitiveness is further influenced by internal market rules and external policy, providing the conditions in which Eurogas members can trade and transport gas across Europe and beyond. Eurogas has been defending commercial freedom against prescriptive or costly regulation. This, by the way, also applies to energy efficiency legislation, which Eurogas otherwise supports. With respect to pipeline development, we have been working towards a level playing field between commercially viable projects and those requiring EU support.

Over the debate on this wide range of topics, Eurogas has widened and deepened its stakeholder relations. I would like to take this opportunity to thank both our members and external interlocutors for their trust in the association. My personal commitment is as strong as ever to further the gas business in Europe to the advantage of Eurogas members, their customers and the natural environment.

Jean-François Cirelli, President of Eurogas



# Milestones in EU policy initiatives & Eurogas activities

2011

June

## • Eurogas General Assembly in Milan

- EU-Russia Energy Dialogue: Conference on innovative uses of gas
- European Commission (EC) proposes Energy Efficiency Directive

October

## • Eurogas Annual Conference

## • Eurogas Roadmap 2050 published



## • Eurogas Distributing Gas: Vital for Europe's Energy Future published

- Regulation on Energy Market Integrity & Transparency (REMIT) adopted
- EC proposed revised Market in Financial Instruments Directive (MiFID)

September

- European Parliament started debate on Energy Taxation Directive
- EC proposed Decision on an information exchange mechanism with regard to intergovernmental agreements in the field of energy

November

- EC proposed Infrastructure Package

## • European Energy Forum Dinner Debate, sponsored by Eurogas

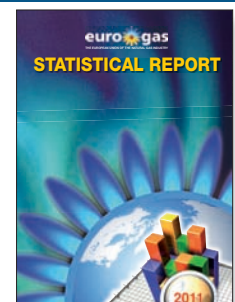
December

## • Eurogas joined forces with other gas associations in GasNaturally initiative



- EC launched Energy Roadmap 2050

## • Eurogas Statistical Report 2011 published



2012

February

## • GasNaturally organised Member States' Forum on gas



April

## • GasNaturally organised European Parliament exhibition and hearing on gas



## • Russian Gas Society-Eurogas International Conference, Energy Dialogue: Russia-European Union. Gas aspects

March

- Madrid Forum adopted Gas Target Model

June

## • Eurogas General Assembly in Nice

# Secretary General's Message



*Over this past year, Eurogas has risen to the challenge of change in the gas industry. We have played an active role in contributing to new political and legislative realities, debating implications, developing positions and creating win-win situations. I admire and thank the members of Eurogas and the secretariat for their ideas, energy and commitment.*

Internally, Eurogas has focused on prioritising and coordinating the work of different committees and task forces, as well as on strengthening our key messages. Eurogas has achieved this by the Strategy Committee testing new working practices; by the Board being more closely involved; and by our members aligning themselves on strong majority views.

Externally, members and the secretariat have sought and accepted opportunities to speak in Brussels, Europe, and further afield. Face-to-face communication with our stakeholders is just as important. Eurogas has fostered its relations with the European Commission (EC), European Parliament, Council, non-governmental organisations (NGOs) and other stakeholders to listen, learn and to communicate our views. And it has joined forces with other associations, for example, for the GasNaturally campaign.

*“Change we shall see not just within our organisation but in the industry as a whole as the EU prepares for a low-carbon energy future.”*

All of these activities are based on information and data that external stakeholders are offered in the various Eurogas reports, position papers, responses to consultation and other written forms of communication.

In 2011, Eurogas created a blog to enhance communication. In 2012, Eurogas will launch a new website. The Eurogas colours and logo will

be adapted to reflect change. And change we shall see not just within our organisation but in the industry as a whole as the EU prepares for a low-carbon energy future.

This year, the EC announced Communications on renewable energy, the Emissions Trading System, the internal energy market and carbon capture and storage (CCS). Next year, we are expecting more concrete action showing the direction to what the EU seeks to achieve in terms of further emission reductions and low-carbon energy.

Eurogas stands ready to continue the debate. I stand ready to organise, advise and lead the Eurogas input.

Beate Raabe, Secretary General

## Energy Roadmap 2050: Recognising the key role of gas in a decarbonised future

*Gas is a no-regret option on the path to achieving the 2050 target. Our Strategy Committee explains why.*

Following the political commitment by Member States for the EU to **reduce greenhouse gas (GHG) emissions by 80-95% below 1990 levels by 2050**, the Strategy Committee of Eurogas has been particularly active in its discussions with the European Parliament and Council on this subject.

**“Gas offers a fast and cost-effective route to less carbon in the energy mix.”**

The *Eurogas Roadmap 2050*, prepared by the Forecasting Task Force and issued in October 2011, formed important Eurogas input to the preparation of the Energy Roadmap 2050. When the European Commission (EC) issued this publication on 15 December 2011 as the centrepiece of its policy initiatives - Eurogas was also quick to respond.

The fact that the Energy Roadmap 2050 recognises the key role of gas in a decarbonised future is particularly welcome. However, the main policy conclusions drafted by the Strategy Committee of Eurogas call for even stronger political recognition that **gas offers a fast and cost-effective route to less carbon in the energy mix**. Eurogas also underlines the point that gas is highly adaptable to work with future zero-carbon technologies.



**Markets and price signals should be the main incentives for low-carbon investments.** If other policy instruments are used to achieve decarbonisation objectives in the EU, they should not undermine the effectiveness of the Emissions Trading System. Nor should they impair the technology-neutral framework that the EC seeks to develop. Eurogas also wants to draw attention to the fact that **State-of-the-art, high-efficiency gas equipment presents a major opportunity for achieving low-carbon results** across all sectors of the European economy. Gas, including biogas and synthetic methane, can also contribute to reducing GHG emissions in transport, which offers a much broader policy than total dependence on future electrification as suggested in the Energy Roadmap 2050.

Eurogas continues to engage in dialogue with the EC, the European Parliament and the Council to explain why **gas is a no-regret option on the path to achieving the 2050 target**. Eurogas is hopeful that these main messages will be taken into consideration in the forthcoming conclusions of policy makers.



# Eurogas Roadmap 2050: A natural strategy for attaining Europe's energy and climate goals

*Gas can be considered a cost-effective solution to reach an 80% greenhouse gas (GHG) emissions reduction by 2050 in the EU, according to the Eurogas Roadmap 2050.*



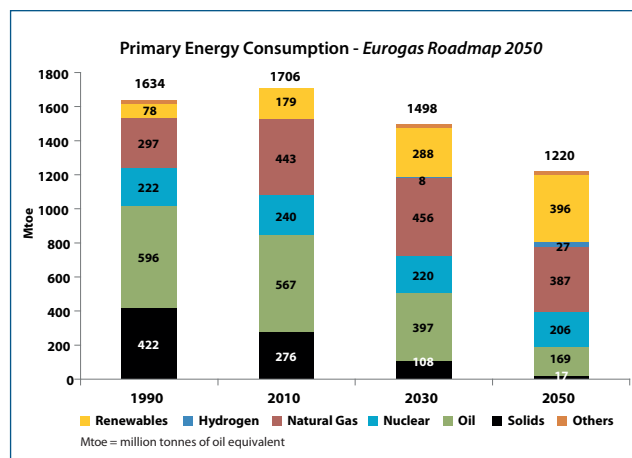
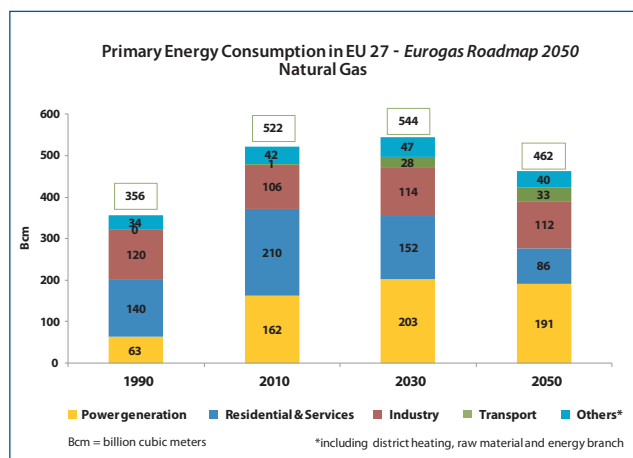
Picking up on the European Commission's call made in a Communication on passing to a low-carbon economy, the **Eurogas Forecasting Task Force brought its own distinctive angle to the debate** by publishing its own prospective study to 2050.

**“Investing now in gas opens up an option to go in whichever direction technology and economics may point around 2030.”**

The *Eurogas Roadmap 2050*, published in October 2011, offers a pathway where all energy-related sectors contribute to reducing GHG emissions, thanks to the use of gas, along with energy efficiency, renewables, technology and behaviour change. Whilst acknowledging that the scale of changing the way European citizens and companies use, distribute and produce energy will be significant, the *Eurogas Roadmap 2050* shows that GHG emissions can be reduced by: **71% in the residential and services sectors; 83% in industry; 69% in transport; and 93% in power generation.** The *Eurogas Roadmap 2050* also identifies the conditions required to bring about the desired change.

From today to 2030, the high efficiency and low emissions of gas will make an immediate contribution by substituting higher carbon fuels, particularly in heating and power generation. Moreover, **the flexibility of gas combines perfectly with the development of renewables.** On that basis, the market share of gas in primary energy consumption would increase from around 26% in 2010 to 30% in 2030. Towards 2050, its market share would be nearly 32%, but the total volumes would be lower thanks to less overall energy demand. The market share of renewables in 2050 would be slightly higher than that of gas. The 2050 horizon requires taking into account great uncertainties, especially at the technological level. The balance between zero-carbon renewables and carbon capture and storage (CCS) in that distant future is unknown today.

Investing now in gas opens up an option to go in whichever direction technology and economics may point around 2030. The *Eurogas Roadmap 2050* provides policy makers with **a sound, realistic study on how to achieve a sustainable decarbonised future for the EU.**





## Internal Energy Market: Securing the needs of our members

*Eurogas has played a key role in co-operating with other market players, the European Commission (EC) and regulators in developing binding and non-binding approaches to improve the overall efficiency of the internal market.*

### Wholesale

Following the adoption of the EU Third Package in 2009 to liberalise further European energy markets, more work was required before potential benefits could be realised for Europe's consumers. The Association for the Co-operation of Energy Regulators, (ACER) and the European Network of Transmission System Operators for Gas (ENTSOG) began **work with industry stakeholders to elaborate technical codes and rules** to facilitate the movement of gas across borders, and bring more opportunities for gas market players.



On the advice of the Systems Users, the Supply and Markets Development and the Distribution Committees, **Eurogas has played a full part in representing our members.** The aim of Eurogas was to ensure that the needs of all its members, including network users, wholesale and retail market suppliers, and also distribution system operators were taken into account, when developing the rules to underpin the wholesale market, notably Capacity Allocation, Congestion Management, and currently Balancing.

### Retail

Regulators, together with stakeholders and the European Commission, also sought to reinforce good retail market practices among Member States. In 2010, **Eurogas was involved particularly in determining good practices** in alternative dispute resolutions for customers and advising on smart metering.

“The target model should strike a balance between issues to be managed nationally, regionally and at European level.”

In 2011, a broader vision of the market was pursued to set a more ambitious, non-binding framework that would meet the policy goals in a dynamic way. **Eurogas took an active role in the consultation process** to develop a flexible model that would stimulate pragmatic progress. The **Gas Market Target Model** agreed in spring 2012 reflects the sector's views.

Eurogas will continue to represent the business interests and contributions of the sector, especially in the Gas Market Regulatory Forum and the Citizens Energy Forum.



# REMIT and MiFID: Ensuring Europe's energy trading markets function well

*The EU Regulation on Transparency and Market Integrity (REMIT) in October 2011 was improved with the input of Eurogas.*

In the wake of international and European concerns to tighten up the arrangements in the financial markets, the EU proposed a framework to ensure Europe's energy trading markets would also function well. **Eurogas supported this tailored approach that would take into account the specificities of energy trading** in order not to damage the developing internal gas market. During 2011, in co-operation with other energy associations, Eurogas prepared input to improve the Regulation on Transparency and Market Integrity (REMIT). Eurogas welcomed its adoption in October 2011 as reflecting a balanced approach.

“For the implementation we try to avoid unduly burdensome or ambiguous reporting obligations.”

Successful implementation of the Regulation now depends on the preparation of robust secondary legislation and guidance. Eurogas, on the advice of the Task Force on Transparency and Market Integrity, has continued to participate in the consultations to clarify in a pragmatic and practicable way REMIT's provisions. We try to avoid unduly burdensome or ambiguous reporting obligations. Other concerns of understanding and interpretation are also to be addressed.



The Regulation provides a framework for oversight of the physical side of the business, in particular to detect any energy market trading abuse.

Nevertheless, **Eurogas has also recognised the relevance to energy trading interests of changing regulation**, which is undertaken to enhance the competitiveness and efficiency of European financial markets, while ensuring their integrity and investor protection. These are the main objectives of the Markets in Financial Instruments Directive (MiFID).

We have to avoid that this tightening of financial market provisions, including fewer exemption possibilities for commodities, has adverse consequences on participants active in energy trading (and already covered by REMIT). Eurogas has therefore co-operated with other energy associations in **arguing for an appropriate approach that recognises that energy trading does not pose systemic risks in the financial markets**. Eurogas considered the proposal from the European Commission a good basis on which to develop a suitably balanced approach and continues to work with the Members of the European Parliament to maintain this outcome.





## Trans-European Infrastructure: Safeguarding a market-based approach

*Eurogas welcomes and supports the proposed Regulation on "Guidelines for trans-European energy infrastructure" and particularly considers constructive the Commission's highlighting that gas will continue to play a key role in the EU's energy mix in the coming decades.*

On 19 October 2011, the European Commission (EC) adopted the proposal for a Regulation on "Guidelines for trans-European energy infrastructure". It aims to ensure that strategic energy networks and storage facilities are completed by 2020. To this end, the EC has identified

“It is important that gas supply companies are part of the Groups of Regional Cooperation that consult with the EC.”

12 priority corridors and areas covering electricity, gas, oil and carbon dioxide transport networks. It proposes a regime of "common interest" for projects (PCIs) that contribute to implementing these priorities and, which have obtained this label.

On the advice of the Infrastructure Task Force, Eurogas has pointed out to the EC and the European Parliament that a market-based approach to projects of common interest should be adopted at all times. **Eurogas would like to see private project investment to apply for PCIs** but it is crucial that those investments are adequately protected.



Moreover, as Regional Groups will define the list of PCIs it is important that gas supply companies are part of the Groups of Regional Cooperation that consult with the EC. If the participation of stakeholders is limited to consultations, the success of the projects might be endangered.

Eurogas has made considerable progress in the European Parliament with the Rapporteur having brought the wording of key provisions in line with amendments that we proposed. However, we understand that in order to accelerate the practical processes related to the Regulation, prior to its adoption the EC has launched meetings of the regional groups, to identify PCIs.

**Eurogas has taken this issue up with the EC** and while we wait for a positive reply, we continue to work with the European Parliament to maintain favourable outcomes across the board.

## Energy Efficiency: Advocating a more proportionate and flexible approach

*An important item on the Eurogas agenda in 2011 was energy efficiency, which has a vital role to play in responding to the climate challenge and in the transition to a resource-efficient economy.*

In mid-2011 the European Commission (EC) proposed a new Directive on Energy Efficiency to replace the 2006 Energy Services Directive. The new Directive was to reinforce and **give new momentum to the drive to achieve the energy efficiency target of 20% by 2020.**

It contained more rigorous measures and obligations, including provisions on Combined Heat and Power (CHP), to help to meet achievement of the target.

**Eurogas endorsed the principal objectives of this new proposal.** Eurogas members, both as suppliers represented in the Supply and Markets Development Committee and as Distribution System Operators (DSOs), envisaged benefits from a framework that would afford opportunities to develop new energy efficiency services in a competitive market.

Nonetheless, there were shared concerns that aspects of the proposals were too prescriptive and onerous for companies, bringing heavy costs, with questionable benefits for the policy objectives.

*“The new Directive should facilitate the development of market-driven energy services.”*

In its contacts with the EC and the European Parliament, **Eurogas advocated more proportionate, flexible approaches** that could build on systems in place, including earlier efficiency gains, and bring a more robust market to develop energy services. In particular, Eurogas suppliers and DSOs in their respective efforts to improve the Directive, sought to ensure that those measures referring to gas smart metering accurately reflect its technical and commercial potential, and that other retail market aspects treated in the Directive are pragmatic and balanced.

As this stage of discussions, Eurogas considers that the wording of key provisions of the Directive is now more in line with its view that the Directive should facilitate development of market-driven energy services, which companies increasingly view as an essential part of a commercial strategy.





## External Energy Policy: Protecting commercial contracts in intergovernmental agreements (IGAs)

*Eurogas has successfully advocated that confidentiality of commercial contracts should be protected in any exchange of information about agreements between EU Member States and third countries.*

As the EU is increasingly importing energy from third countries, external energy policy moves more centre stage. **For Eurogas members, diverse supplies are crucial and in this respect it is legitimate to require the energy market to be competitive**, which presupposes a sufficient number of sources for healthy competition to take place. It is positive that diversity of supply has increased over recent years.

“Confidentiality of commercial agreements is key.”

A key point that the External Energy Policy Task Force of Eurogas continues to make with policy makers is that the **commercial contracts behind these diverse supplies form the backbone of a competitive market and security of supply**.

At the end of last year, the European Commission (EC) published a Proposal for a Decision to exchange information about IGAs. This sets out the sensitive nature of the information contained within commercial agreements. For this reason, while advocating the issue,



Eurogas has maintained the importance for **any information exchange mechanism not to jeopardise the confidentiality of the content of commercial agreements**. And not without success. Eurogas has managed to make the point to Member States and Parliament that agreements between commercial entities should fall outside the scope of the proposed Decision - without any exceptions. At the time of writing, in the text as it currently stands, they are clearly excluded.

Finally and more broadly, **Eurogas appreciates the fact that the EC and the European Parliament continue to treat the external dimension of energy policy seriously**. The support for the principle of good coordination of external relations with producers, transit and other consumer countries is important since the quality of these external relations is fundamental to the operations of our businesses and is in the interest of consumers.



## GasNaturally Campaign: Working together to raise awareness

*Last year, Eurogas joined forces with other associations to launch the GasNaturally campaign with a view to showcase the essential role that natural gas plays in the energy system's forthcoming transformation.*

In autumn 2011, Eurogas joined with six other gas-related associations including European Gas Research Group (GERG), Gas Infrastructure Europe (GIE), International Association of Oil and Gas Producers (OGP), International Gas Union (IGU), International LNG Importers Association (GIIIGNL), Marcogaz.

“GasNaturally feeds the debate about the benefits of natural gas in a long-term, sustainable energy mix.”

Eurogas took a leading role in a campaign known as GasNaturally, which aimed to promote the visibility of gas and increase our stakeholders' awareness of the strong advantages of gas in a low-carbon energy mix. The campaign was organised in the context of the EU institutions' debate around the European Commission's November 2011 Energy Roadmap 2050.

Activities focused around a Member States' Forum in February 2012, which raised the profile of gas among energy representatives in the Council, and a Parliamentary Hearing and Exhibition in April 2012. Both events were well attended.

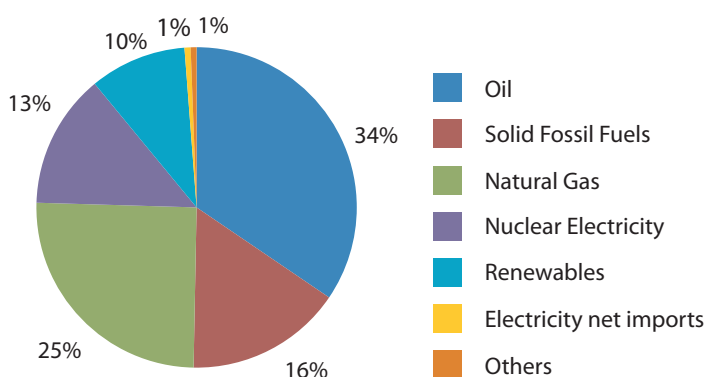
A common website ([www.gasnaturally.eu](http://www.gasnaturally.eu)) provides information and data at all times to all those who want to know more about gas.



## Statistical Report 2011

*In December 2011, the Statistics and Forecasting Committee of Eurogas, published the Statistical Report 2011. The statistical data in the report have been collected with the assistance of the national gas associations and member companies of Eurogas.*

### 2010 Primary Energy Consumption by fuel (EU)



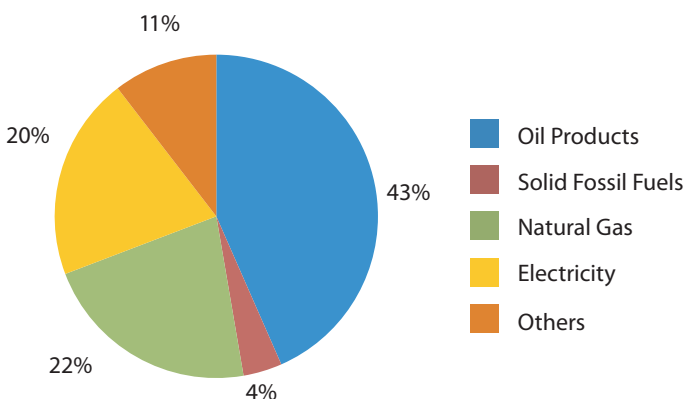
### Did you know...?

- Gas represented a quarter of the EU's primary energy consumption in 2010.
- In 2010, the Netherlands had the highest share of gas in primary energy consumption at 47%, while Sweden had the lowest at just 3%.

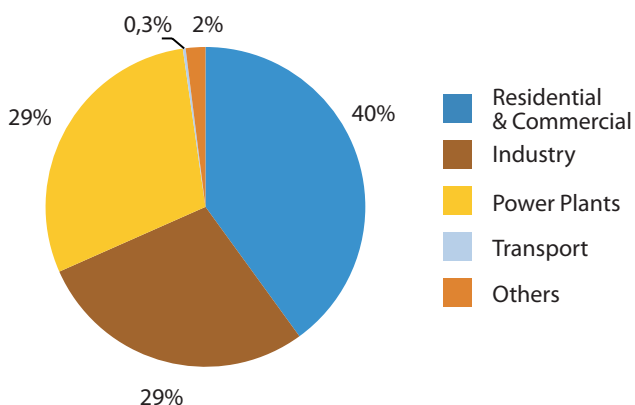
### Did you know...?

- Gas represents about one fifth of the final energy consumption of the EU, slightly more than electricity.

### 2009 Final Energy Consumption by fuel (EU)



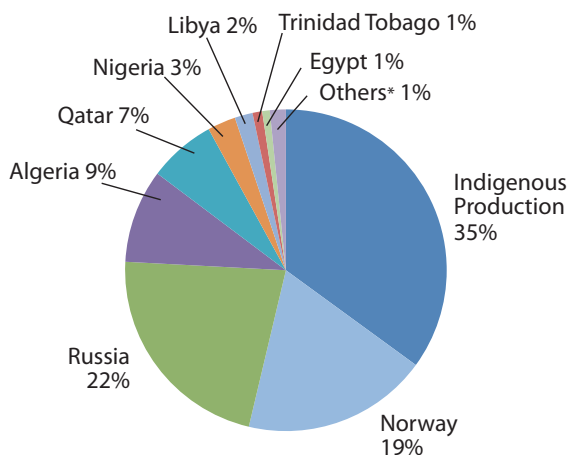
### 2010 Natural Gas Sales by sector



### Did you know...?

- 40% of the gas in the EU supplies the residential and commercial sectors.

## 2010 Breakdown of EU27 Supplies



\*Including supplies from sources which can not be identified.

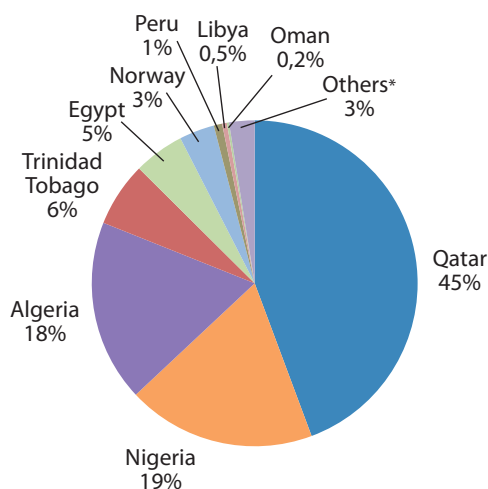
## Did you know...?

- 54% of the gas supplied to the EU comes from indigenous EU production and Norway.

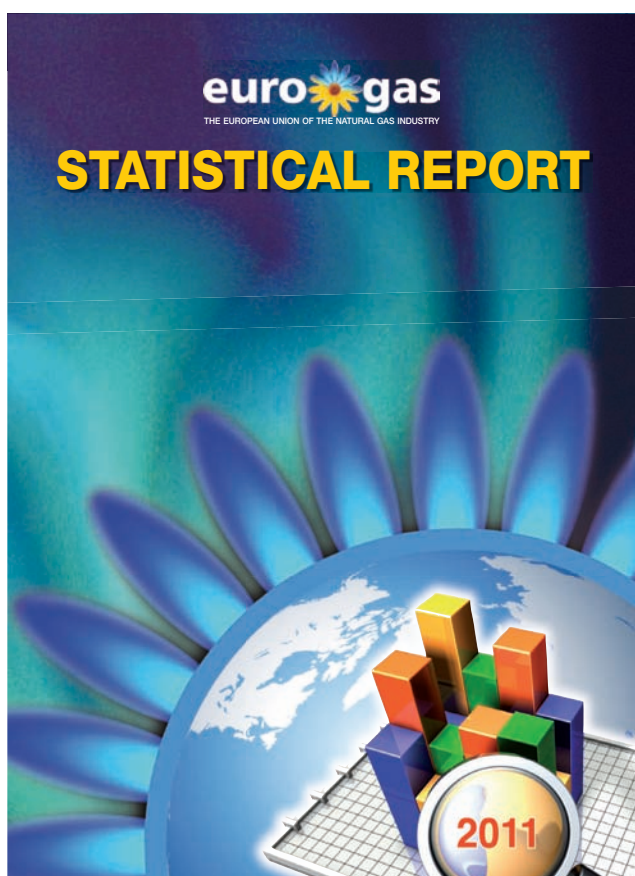
## Did you know...?

- In 2010, almost one quarter of EU net imports was delivered by liquefied natural gas (LNG).
- Europe's LNG comes from more than 10 countries from around the globe.

## 2010 Breakdown of EU27 LNG Supplies



\*Including supplies from sources which can not be identified.



## Did you know...?

- There were about 1 million natural gas vehicles in the EU in 2010. Italy is leading the way with almost 80% of the EU's fleet of natural gas vehicles.



## Executive Committee



### President

**Jean-François Cirelli**

Vice-Chairman and President of GDF SUEZ



**Werner Auli**

Executive Board Member  
OMV Gas & Power



**Domenico Dispenza**

Chief Operating Officer  
ENI S.p.A -  
Gas and Power Division  
(Until end 2011)



**Antero Jännes**

Chief Executive Officer  
Gasum



**Gertjan Lankhorst**

Chief Executive Officer  
GasTerra



**Klaus Schäfer**

Chairman of the Board  
of Management  
E.ON Ruhrgas AG  
and E.ON Energy Trading SE

## Secretariat Staff

**Beate Raabe**

Secretary General

**Simon Blakey**

Special Envoy

**Tracey D'Afters**

Communications Manager

**Ramiro Gaete**

Reception & Front Desk Officer, Assistant to R. Wassen

**Saraine Ifill**

Assistant to M. Loudon

**Marion Le Roy**

Economic Adviser

**Margot Loudon**

Deputy Secretary General

**Emilie Marinova**

Senior Economic Manager

**Kathleen Sinnott**

Assistant to E. Marinova, M. Le Roy & T. D'Afters

**Philippe Trousson**

Administration & Finance Manager

**Ruud Wassen**

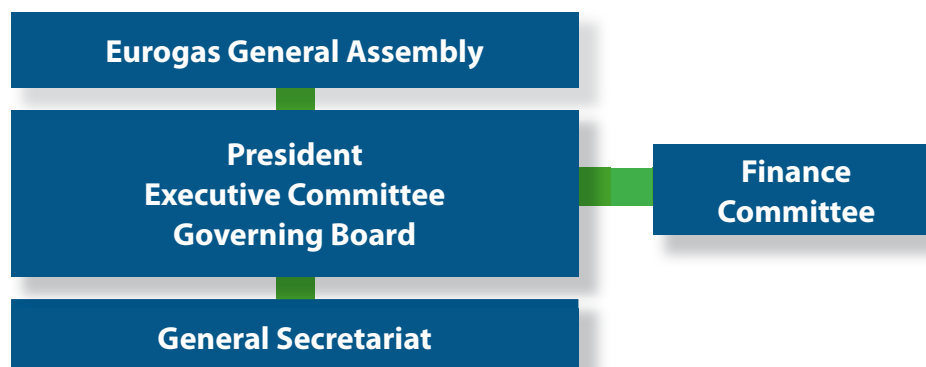
Senior Regulatory Affairs Manager

**Katerina Zikmundova**

Assistant to B. Raabe & S. Blakey

Special thanks to BP for sharing their trainee Vicky Brunati with us in 2012!  
Simona Basiu left Eurogas in May 2012.

# Organisational Structure



## Distribution Committee

Chair: José-María Almacellas,  
Gas Natural Fenosa

- Ad hoc expert groups on Codes

## External Communications Committee

Chair: Anton Buijs, GasTerra

## Legal Affairs Committee

Chair: Denis Schlumberger,  
Total

## Supply & Markets Development Committee

Chair: Pauline Lawson, E.ON

- TF Smart Metering  
Chair: David Johnson, Centrica (until end 2011)

## Strategy Committee

Chair: Theo Ebels,  
GasTerra

- TF EEP - External Energy Policy Task Force  
Co-Chairs: Antoni Flos, Gas Natural Fenosa  
Boleslaw Rey, PGNIG - Polish Oil and Gas
- TF EU-RUSSIA - EU-Russia Task Force  
Chair: Reiner Hartmann, E.ON Ruhrgas
- TF INFRA - Infrastructure Task Force  
Chair: Christophe Miaux, Total

## Statistics & Forecasting Committee

Chair: Satu Raikaslehto, Gasum

- TF FCST - Forecasting Task Force  
Chair: Laurent David, GDF SUEZ

## System Users Committee

Chair: Ralf Presse,  
RWE Supply & Trading GmbH

- SUG - Storage Users' Group  
Chair: Hartwig Ziegler, RWE Transgas
- TF LNG - Liquefied Natural Gas Task Force  
Chair: Victor Tuñon, Gas Natural Fenosa
- Ad hoc expert groups on Codes

## Taxation Committee

Chair: Michael Längle,  
RAG Rohöl-Aufsuchungs Aktiengesellschaft

## Transparency & Market Integrity

Chair: Valeria Palmisano, Edison

## Brussels Based Correspondents Advisory Group

## AFG - Association Française du Gaz

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## AGN - Associação Portuguesa De Empresas De Gás Natural

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Mr Luciano Baratto



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## BDEW - Bundesverband der Energie- und Wasserwirtschaft

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Dr Anke Tuschek\*



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Mr Thomas Hesselbarth



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Mr Liam O'Riordan



## ENA - Energy Networks Association

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A large rectangular area with a light purple background and faint, abstract white wave-like patterns. It contains 30 horizontal blue lines for writing, arranged in a single column.



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