

EPPSA Annual Report 2011



European Power Plant Suppliers Association

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EPPSA

Introductory Statement

■ The European Power Plant Suppliers Association (EPPSA) is the voice, at European level, of companies supplying power plants, components and services. EPPSA members, located throughout Europe, represent a leading sector of technology with more than 100 000 employees and annual revenue of over €30 billion.

EPPSA actively promotes technologies for highly efficient and sustainable power generation in a carbon constrained world.

EPPSA believes increased investment in Research, Development and Demonstration is a key factor in driving EU competitiveness as well as ensuring affordable near zero emission power supply.

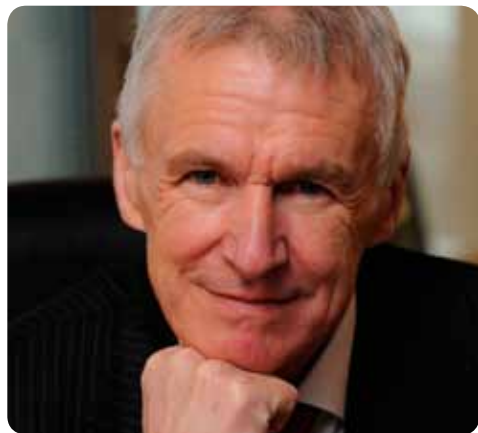
Virtually all power plants in the EU are built by members of EPPSA, or equipped with their components.

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“Without
investments, research
and new technologies, [...] we will not be able to reach a [...] safe, secure, sustainable
and affordable
energy system.”

Philip Lowe, Director General,
Directorate General Energy, European Commission

Philip Lowe,
Director-General for Energy, European Commission
Photo: European Commission Audiovisual Services



■ 2011 was the 60th anniversary of the European Coal and Steel Community. Its aim was to create joint control over coal, then vital to the production of energy. Today, 60 years later, energy remains at the heart of our continuing construction of Europe. Energy policy should, once again, be a great European integration project. A safe, secure, sustainable and affordable energy supply is vital to our economic stability and growth and to our engagement with climate change.

It is time to Europeanise energy policy. A lot has been achieved but a lot remains to be done.

In February 2011, the European Council set up a clear deadline for completing the common energy market. By 2014, power and gas should be transported as easily as goods and services throughout Europe, providing a real European marketplace in energy and thereby ensuring competitive prices for consumers and industry alike. This is fundamental in the 2020 energy strategy, clearly supported by the European Council. Geared to the established 20-20-20 objectives for greenhouse gas emissions (GHG), energy

efficiency and renewable energies, five priorities have been highlighted for the next decade: saving energy, achieving a market with competitive prices and secure supplies, boosting new technologies and strengthening the role of the EU in international energy relations. It is crucial to build a European energy system equipped to face global competition, to support sustainable growth and competitiveness and to achieve a smooth transition towards a low-carbon economy.

Europe has to develop its own technological potential not only to reduce CO₂ emissions but also to create competitive energy systems. Bearing in mind its GHG reduction target of 80-95% below 1990 levels by 2050, the EU has to increase its efforts to achieve a competitive low-carbon economy. To reach the objective, all existing energy sources shall be used to their full potential in a competitive way. Among them, the cleanest fossil fuel technologies are important.

Research and innovation on low-carbon technologies and infrastructures are necessary. This is the European bet. Investments in low-carbon technologies today can lower the costs of new technologies in the future.

We estimate investments needed in Europe between now and 2020 in the electricity and gas sectors as over €1 trillion. This includes power generation, transmission and distribution. As regards investment in the development of low-carbon technologies, we believe that total investment (public and private) in the EU has to increase from the current €3 billion per year to around €8 billion per year, to effectively move forward the Strategic Energy Technology Plan.

Without investments, research and new technologies, and the systems and markets that allow us to use efficiently the fruits of these investments, we will not be able to reach our objective of a low-carbon economy and a safe, secure, sustainable and affordable energy system.

I would like to thank EPPSA for its work in promoting efficiency and competitiveness in the European energy market through technology research.

“The **solution** to
today’s energy challenges
lies in a balanced **energy mix**
and a **plurality** of technologies”

Franz-Josef Mengede, EPPSA President

Franz-Josef Mengede,
EPPSA President



Patrick Clerens,
EPPSA Secretary General



■ In 2009, the European Union's (EU) Energy and Climate Change Policy for 2011-2020 became law, thereby setting some challenging targets for the 27 member states of the EU. The policy's '20-20-20' objectives require that by the end of the decade renewable sources should contribute at least 20 percent of the energy mix, reduce greenhouse gas emissions by 20 percent, and save 20 percent in energy consumption.

Within the same period, demand for electricity in Europe is set to increase by a third, while security of supply for a population of more than 500 million people has to be assured. How can we achieve these energy and climate change targets while generating more electricity and ensuring security of supply?

EPPSA firmly believes that the solution to these challenges lies in a balanced energy mix and a plurality of technologies. While renewable sources are an essential ingredient of the mix, Europe cannot meet its energy targets and fulfill its supply obligations with renewable energy alone. Investment and political support for conventional types of power generation are just as important for Europe's welfare as investment in renewable

energy. We also need to bear in mind the extensive installed base of conventional energy we already have.

If the EU is to meet a forecasted increase in electricity demand of about 30 percent, fossil fuel based power plants will be needed in the coming decade. These plants will be required not just for their much-needed generating capacity, but as backup and support for the ever-increasing volumes of intermittent renewable power that our transmission grids will be dependent on.

Plant efficiency and carbon capture and storage (CCS) are two key elements of a balanced and pluralistic approach. Huge strides have been made in recent years with high efficiency and CCS technologies. These need to be rolled out on a continent-wide basis in the coming decade. By setting minimum efficiency standards for all new and existing power plants and by equipping them with a CCS capability, carbon dioxide emissions can be significantly reduced.

Power plant suppliers have invested heavily in developing the technologies that can help meet the EU's targets and enable Europe

to be a world leader in combating climate change. The deployment of these technologies needs to be accelerated. The 2020 deadline is fast approaching and a 'business as usual' strategy is no longer an option.

What EPPSA needs to focus on is long-term policy stability. Additional support is required in the form of funding and incentives, a harmonised and stable regulatory framework, and acceptance from the general public that new power generation infrastructure is necessary, even if it is in 'my backyard.' The challenge of meeting EU and global directives with new investment will need to be supported by government funding. Incentives comparable to those enjoyed by renewable sources should be extended to others, and energy policies once enacted should be implemented and adhered to. Above all, consumers must be better informed by their political representatives that reliable and affordable electricity requires a balanced energy mix, a plurality of approaches and a significant contribution from conventional fossil fuel sources in order to ensure a stable and secure supply of quality power.

EPPSA believes ...

... in a balanced energy mix. To meet the tremendous growth in demand for electricity and ensure the security of supply, all available sources are needed. There is no one, ideal energy source.

... in improved efficiency in power generation. Efficiency improvement in both new and existing plants is the decisive factor to preserve scarce natural resources and to achieve CO₂ reduction targets.

... that clean and efficient fossil fuel power plants need rapid implementation. Replacement of older, less efficient power plants by state-of-the-art ones enables large scale CO₂ avoidance.

... in a
balanced
energy mix

... in improved
efficiency
in power generation

... that clean and efficient
fossil fuel power
plants need rapid implementation

EPPSA Key messages

... that increased investment in Research & Development is vital

... that continuous investment and scale-up of CCS technologies are required to make Europe a world leader

... that public support for fossil fuel technology and its infrastructure must be encouraged

... that increased investment in Research & Development is vital. Suppliers are investing heavily to develop more environmentally friendly technologies which meet the ambitious EU targets. Investment from authorities and political support are also necessary.

... that continuous investment and scale-up of CCS technologies are required to make Europe a world leader. Immediate commercialisation of available technologies is necessary to accelerate deployment since time is of the essence. Funding, a comprehensive legal framework and public support are needed to make demonstration plants happen.

... that public support for fossil fuel technology and its infrastructure must be encouraged. Consumers must be better informed that reliable and affordable electricity – a pre-requisite for a stable economic growth – requires a significant contribution from fossil fuel power generation.

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“**Innovation** is the key driver
for European technology suppliers,

**Intellectual
Property Rights**
are the key drivers for Innovation.”

Patrick Clerens, EPPSA Secretary General



Communications Activities



Technology Evening 2011

On the occasion of the fifth edition of what has now become an unmissable event on the Brussels scene, namely EPPSA's Annual Technology Evening, Mr. Franz-Josef Mengede, Group Senior Vice President and head of Business Unit Power Generation within the Power Systems division of ABB, was announced as the new President of EPPSA by his predecessor, Mr. Andreas Wittke. Mr. Mengede took advantage of this opportunity to, once again, defend what EPPSA believes to be the fundamentals of the energy community:

"Energy efficiency will play a key role in reducing CO₂ emissions and mitigating climate impact. As one of the biggest energy sector, the power generation sector has a significant contribution to make. Power producers need to leverage the latest technologies in order to ensure optimisation, efficiency and operational flexibility of power plants".

Following this transfer of power, the EU Commissioner, Mr. Günther Oettinger addressed the major key stakeholders of the energy community in Europe on focusing on the timely and necessary commercialisation of technologies like CCS to ensure affordable and reliable electricity supply to European consumers while minimising the environmental impact. Mr. Oettinger welcomed the efforts by EPPSA and its members towards research, development and demonstration into the power generation technology of the future. The audience was then captured by two CO₂ molecules, who demonstrated that by overcoming prejudice and understanding alternatives, their

storage is a concrete, realistic and safe option.

This event was then followed by a networking reception and the famous EPPSA caricaturist managed once again to shed new light on well known faces...

EPPSA Power Plant basics

"How does it work?"

Back in 2007, EPPSA launched a series of sector-specific group workshops designed to promote awareness of the fundamentals of power generation at a European policymaker's level. This year again, EPPSA held meetings on power plants basics at several of the European Directorates General as well as in the European Parliament. These workshops aim to explain how power plants function as well as the physical constraints under which they operate.

Coal-Gen 2011

Designed to help Europe meet its 20-20-20 targets of lowering greenhouse gas emissions, this annual event took place in Prague, Czech Republic. EPPSA participated in the Plenary Session on The Future of Coal-Fired Power Generation in Europe. During this session EPPSA clearly indicated the need for efficient power plants and for the protection of Intellectual Property Rights, if one wants European industry to develop new technologies reducing even more the environmental impact of conventional power generation. COAL-GEN Europe is designed to inform the general public about European coal-based energy as well as lead the way towards zero emissions and carbon capture and storage technologies.



Commissioner Günther Oettinger on the commercialisation of technologies such as CCS



Announcement of EPPSA's new President



Champagne Raffle at Annual Technology Evening



EPPSA President, Franz-Josef Mengede opens the 5th Annual Technology Evening

The Albert Hall Complex

■ International Power Summit 2011

This year's International Power Summit presented the industry with the most effective platform for partnerships at both technical and strategic level for suppliers and operators. Seen as a major contributor on the European scene, EPPSA was invited to chair the two-day conference and give its views on the impact of infringements to Intellectual Property Rights on power plant operators and suppliers.

Hannover Messe 2011

"Get new technology first" was the motto of this year's Hannover Messe held from the 4th to the 8th of April 2011 in Hanover, Germany. EPPSA participated, represented by its President, Franz-Josef Mengede at Life Needs Power 2011 Energy Forum. The Association took also part in the Power Plant Technology User Forum, a hub for all the latest know-how and developments in power plant technology. On two occasions, EPPSA was asked to deliver presentations on infrastructure requirements for a balanced energy mix and the industrial application of CCS in a carbon-constrained world.

Power-Gen 2011

Power-Gen Europe, now in its 19th year, along with Renewable Energy World Europe and Nuclear Power Europe unite the entire spectrum of power generation under one roof. With well over 500 exhibiting companies, nowhere else in Europe will you find such a range of state-of-the-art services and technologies covering every aspect

of the power engineering sector. Once again, EPPSA was invited to give an insight on the EU energy policies by presenting different updates in the EU low carbon policies in 2011 and beyond. EPPSA also chaired different sessions such as Strategies for the European Power Industry.

VGB Congress 2011

This year's VGB Congress was held in Bern, Switzerland. The topic this year was "European Generation Mix - High Demand for Flexibility and Storage". In order to support and represent its members, the EPPSA Secretariat travelled to Bern and held an information stand on the exhibition floor. Furthermore, EPPSA's President, Mr. Franz-Josef Mengede gave a presentation entitled "Power Market, Technologies & Acceptance: Status and Perspective" during the plenary session, where he stressed the importance of energy efficiency and investments.

The Future for German Power Generation Projects 2011

This very strategic two-day conference aimed at identifying emerging strategies and visions regarding the role of conventional power generation in the future energy mix in Germany. Representatives from the European Commission, the IEA, Banks and different Utilities debated under the Chairmanship of EPPSA's Secretary General about the need and possibilities to replace the gap left by nuclear power after the closure of the German plants.



The EPPSA team at VGB Congress, Bern 2011



Networking highlight at VGB Congress, Bern 2011



EPPSA President, Franz-Josef Mengede at VGB Congress, Bern 2011

Large Combustion Plants
BREF review process

European Technology
Platform – Zero Emissions
Fossil Fuel Power Plants

Berlin Fossil Fuels Forum

Policy

Activities

Intellectual Property
Rights

EU “FP8”
Policy Breakfast

Carbon dioxide capture and
storage in geological formations
as clean development mechanism
project activities



Policy Breakfast: EU "FP8" at EPPSA Offices, Brussels, April 2011



EPPSA Secretary General, Patrick Clerens on EU energy policies at Power-Gen Milan 2011

■ Large Combustion Plants (LCP)

BREF review process

BREFs have a major impact on permits given to new power plants. As representative of the European Power Sector for conventional Plants, EPPSA has been involved in this process since the beginning and participated in the kick-off meeting for the review of the Large Combustion Plants (LCP) BREF held in Seville, Spain. EPPSA elaborated and submitted its proposals for the review of the best available techniques in this domain based on the work accomplished in the LCP BREF Working Group.

Intellectual Property Rights

Over the years, the European manufacturing industry has increasingly disclosed cases of IPR infringements of their technologies from third countries. In order to have a coordinated response to these illegal practices, EPPSA proposed to establish an IPR think tank, bringing a critical mass of stakeholders together to support a strong reply from the European decision makers. The Association cooperated with the European Commission on this topic and was invited to participate in several Commission internal workshops to make this point more known through real cases.

7th EU – China Dialogue on IPR

EPPSA participated in the 7th session of the EU – China Dialogue on IPR held in July in Brussels. Co-chaired by DG Trade officials and members of the Chinese Department of Treaties & Law

(MOFCOM), the event mainly focussed on IPR cooperation and enforcement. After explaining the stakes in IPR policy, European and Chinese counterparts discussed the possibility of strengthening the IPR Strategy for Promoting Innovation and the necessity to enforce Intellectual Property Rights.

Berlin Fossil Fuels Forum

The Berlin Fossil Fuels Forum is an important initiative that provides a prestigious platform for dialogue on policy and technological developments in fossil fuel related issues. As in the previous years, EPPSA gave its active contribution to the Forum's working Group on sustainable Fossil Fuels. In particular, in May 2011, EPPSA's Secretary General, gave a presentation on "CO₂ Capture: Health and Safety Issues". In October 2011 EPPSA attended the Forum's Seventh Plenary Session.

European Technology Platform – Zero Emissions Fossil Fuel Power Plants (ETP ZEP)

EPPSA has been actively supporting the Zero Emissions Fossil Fuel Power Plants Technology Platform since its creation to which it gave an important contribution in 2004. EPPSA and its members attended the ZEP General Assembly held in Brussels and through its members the Association played a remarkable role in the different Working groups, the Coordination group and the ZEP's Advisory Council. In September 2011 the Board of Directors decided to renew EPPSA's financial support to ZEP for the next

Technical Committee working on the Energy Efficiency Plan 2011 at ABB, Mannheim, March 2011



EPPSA Policy Officer, Maria João Duarte on Industrial applications of CCS in a carbon-constrained world at Hannover Messe 2011

“Energy Efficiency and Flexibility Optimisation in power plants will play a key role in reducing CO₂ emissions”

Franz-Josef Mengede, EPPSA President

three years.

Carbon dioxide capture and storage (CCS) in geological formations as clean development mechanism (CDM) project activities

Significant global CO₂ reduction can only be achieved following the IEA by a widespread implementation of CCS technologies around the planet. EPPSA followed very actively the discussion on CDM and its role in supporting CCS deployment. In February 2011 EPPSA submitted a position paper on “Carbon dioxide capture and storage in geological formations as clean development mechanism project activities” to the United Nations Framework Convention on Climate Change (UNFCCC). After recalling the importance of CCS as a significant mitigation technique for climate change, EPPSA strongly supported the inclusion of CCS in CDM project activities as an additional initiative to further develop and deploy CCS. On December 9th, it was decided in Durban (COP17) to finally include CCS as a CDM activity. Therefore CCS has now been accepted internationally as a low carbon technology as are wind and solar.

International Coal Dialogues

The European Commission has established bilateral working groups with several major coal producing/using countries. The working groups bring together policy makers, industry and academia to discuss policies, best practices and technologies enabling the efficient use of coal and minimising its environmental impact. EPPSA strongly cooperates with the European

Commission in this domain in order to deliver clean coal power generation to countries with a need for modern technology. EPPSA provides its members with information regarding ongoing EU Energy dialogues, especially the Clean Coal working groups.

EPPSA Policy Breakfast: EU “FP8” state of play – Towards the future EU research & innovation funding

EPPSA organised and hosted its first Policy breakfast on April 29th in its offices in Brussels. The April event was the result of a narrow co-operation between EPPSA's Secretariat and the European Commission, DG Research and Innovation. Considered by all participants as a great success, the Policy Breakfast focused on the EC's “Green Paper on a Common Strategic Framework for future EU Research and Innovation Funding”.



Policy Breakfast: EU “FP8” at EPPSA Offices, Brussels, April 2011



Helen Donoghue (European Commission) on the Energy Roadmap 2050

Vice President
Mike Farley



President
Franz-Josef Mengede



Vice President
Rainer Redinger



Technical Chair
Klaus-Dieter Tigges



Public Relations Chair
Annette Titzmann



Secretary General
Patrick Clerens



Treasurer
Pierre Melin

Organisation Chart

General Assembly

Members



Franz-Josef Mengede
ABB Group



Giles Dickson
Alstom Power



Martin Pogoreutz
Andritz



Massimo Penati
Ansaldo Caldaie



Carlo Trifone
BWE



Stéphane Crévecœur
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Mervyn Sambles
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Karel van Buuren
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Nooter/Eriksen



Gianni Casero
STF BWE



Stephan Bergmans
Stork Thermeq



Paolo Magaldi
Magaldi Power



Rainer Redinger
TLT-Turbo



Meeting of the Technical Committee on LCP BREF revision at EPPSA in Brussels, October 2011

■ Chaired by Dr. Klaus-Dieter Tigges from Hitachi Power Europe, EPPSA's Technical Committee provides the expertise and content for the organisation's position papers and communication's materials. Consisting of knowledgeable engineers from EPPSA member companies working closely with the Public Relations Committee, they bring their experience to bear on the latest developments in European energy and environment policy related to power generation.

Keeping Europe and more precisely European industries at the technological forefront of the global industry is a challenge, albeit a feasible one, that needs to be addressed. By ensuring sustained investments in power generation in the long term, Europe will be covering the leap forward that is needed in order to remain competitive and ensure the security of energy supply needed to push its

industry. These crucial investments can, furthermore, guarantee existing employment while boosting the creation of future jobs.

Working in relation with the different working groups established within EPPSA such as Concentrated Solar Power, Power Plants Efficiency Improvements and Flue Gas Cleaning, the Technical Committee produced, in 2011, a number of position papers. Among them the position paper on Intellectual Property Rights at the European suppliers of technology level which was highly welcomed by the European Commission and led to a further cooperation with several Directorates General. Another important topic referred to Carbon dioxide capture and storage in geological formations as clean development mechanism project activities in the power generation industry.



Technical Committee meeting at ABB, Mannheim, March 2011

The Technical Committee



Technical Committee meeting at Doosan Power Systems, Renfrew, June 2011

2011 was a special year for the working group on the reference document on Best Available Techniques (BAT) for Large Combustion Plants (LCP BREF) as its revision by the European Commission was launched mid March and will be carried out until 2014. In October 2011, EPPSA participated in the kick-off meeting that was held in Seville, Spain. This meeting welcomed all major stakeholders in the European energy sector, including member states and EFTA countries, the European Commission, environmental NGOs and industry. EPPSA, alongside other industry stakeholders, contributed to the wish list and data collection questionnaire. It was decided to pursue the effort in 2012 and beyond.

The Flue Gas Cleaning Working Group focused its attention on mercury and Carbon dioxide capture-related issues and closely

monitored the evolution of the debate on these topics both at a European and International levels. Because of its expertise, EPPSA was contacted in order to deliver technological solutions and qualified information on mercury. The Flue Gas Cleaning Working Group worked hand-in-the-hand with the LCP BREF Working Group to even increase the impact of its documents.

In addition to its policy work, the Technical Committee maintained its involvement in the European Technology Platform – Zero Emission Fossil Fuel Power Plants (ETP ZEP).



Visit of a manufacturing complex in Renfrew, Howden Group, June 2011



Meeting of the Public Relations Committee
at Doosan Power Systems, Renfrew, June 2011

■ Defining how to bring the message across is the most important task for a Brussels-based Association. The Secretariat develops its contact lists by networking the European circles, but this is not sufficient to achieve the set targets if the means to deliver the message are not of the same quality. The content is important, but often the packaging is at least as important. This is why the Public Relations Committee plays a vital role for EPPSA.

This year EPPSA welcomed a new chair at the PR Committee. Ms. Annette Titzmann from Alstom Germany is taking on the responsibilities of Mr. Gerhard Brandt (ABB) who the EPPSA Secretariat would like to thank for his valuable contribution and time during these past years. The PR Committee is composed of a useful blend of experts with

completely different backgrounds including marketing and sales, public relations and engineering. The committee members are ideally qualified to shape EPPSA's goals and strategies as well as formulate EPPSA's public approach regarding all matters, including EPPSA events and publicity materials.

Working in synergy with their colleagues on the Technical Committee, the PR team works on the style and presentation of EPPSA's display materials for the Technology Evening and external events, and decides on the content that would have the largest impact on the audience.

One of the most important tasks of the PR Committee is the Annual Technology Evening EPPSA holds in Brussels. This year again, the committed work of the

Public Relations Committee working on the Technology Evening at EPPSA, Brussels, October 2011.



Meeting of the Public relations Committee at ABB, Mannheim, March 2011



Public Relations Committee



committee resulted in a sound and successful Technology Evening with, for the first time, a theatre play that provoked positive reactions from the audience. The two CO₂ molecules personified by the actors along with an original script and staging took the guests' breath away.

Finally, it is the PR Committee that is ultimately responsible in deciding which events EPPSA should take part in. Events like the Hannover Messe, Power-Gen Europe and Coal-Gen Europe proved to be invaluable means to reach a wider audience and promote the association's message of clean, secure energy from fossil-fuel power generation.



Chris & Claude
Annual Technology Evening



The EPPSA Secretariat: Patrick Clerens, Maria João Duarte, Nicolas Kraus and Alberto Lampasona

■ **Maria João Duarte** is Policy Officer for EPPSA and responsible for all facets of the association's public relations and interaction with the members. She joined EPPSA following experiences with international organisations in the humanitarian and security field and holds a degree in International Relations.



EPPSA Secretariat

■ **Patrick Clerens** studied law at the University of Saarbrücken and the University of Mainz. Since 1991, he has worked as a consultant for a private company specialising in European Affairs in Brussels. He manages the EPPSA office in Brussels as the Secretary General since January 2005, building upon his prior experience as EPPSA's Brussels Representative since 2003. In this function he liaises between member companies and the EU institutions on issues related to energy and clean fuel technology.



■ **Nicolas Kraus** joined EPPSA in September 2011. After having completed his studies in Business and Management Administration with specialisation in Business Policies, he gathered experience in positions within in the pharmaceutical and banking industries. He is in charge of coordinating the legislative, lobbying, communications and public relations activities of the association.



ABB



ALSTOM



ANDRITZ

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Inspire the Next



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