

EPPSA Annual Report 2012



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 flexible, 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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“Europe has the know-how,
the ability and the ambition
to lead the world in
developing the technologies
required to
tackle climate change.”

Connie Hedegaard,
EU Commissioner for Climate Action

Connie Hedegaard,
EU Commissioner for Climate Action
Photo: European Commission Audiovisual Services



■ In the aftermath of the financial and economic crisis in Europe, where so much time is spent over the last two years on controlling public debt, reinforcing our currency and tightening the economic governance, we must be reminded that austerity alone is not going to get us back on a prosperous track. We need to look beyond the immediate crisis and ask the question: How do we ensure Europe's long-term competitiveness? How do we create the conditions for our longer term prosperity?

Climate change has become a highly political issue because it is interrelated with a variety of important policy choices, from the energy mix to modes of transport. The dramatic consequences of climate change are predicted to intensify in the coming decades, and therefore tailored actions are required.

The solutions to the EU and global climate change objectives lie to a great extent in boosting energy and resource efficiency and in a balanced energy mix and new/advanced technologies, which are also a major contributor towards the European Union's innovation, jobs and growth

agenda. Europe has to develop its own technological potential that reduce CO₂ emissions and thereby contribute to create competitive energy systems for the future. 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. Europe has the know-how, the ability and the ambition to lead the world in developing the technologies required to tackle climate change. Targets work. Pricing works. Putting a price on carbon emissions can help steer investments in the right direction and whilst the EU has pioneered emissions trading through the EU Emissions Trading System (EU ETS) we're no longer alone as more and more countries and regions across the world acknowledge the advantages and implement this cost-efficient and flexible policy tool.

Reinventing our carbon intensive infrastructure by deploying more efficient energy technologies is critical if we are to meet our EU targets, to secure energy supply, and to achieve a smooth transition towards a low-carbon economy. The EU has many good cases of legislation that has accelerated innovation and deployment

of new technologies, with regulations on vehicle emissions of CO₂ and on F-gases being among the best examples. In the future the world will need more integrated energy and transport systems relying to a much higher degree on renewables and other innovative technologies. Part of the task is to make sure that innovative technologies are deployed safely and that their risks are properly managed. This for example concerns carbon capture and storage (CCS), which along with innovative renewable energy technologies can obtain funding for demonstration projects under the second call of the EU's so-called NER300 programme, funded by the sale of emission allowances in the EU ETS and to be launched in early 2013.

I would like to thank EPPSA for its work in promoting efficiency and encourage its members to continue investing in technology research and demonstration which will be decisive for competitiveness in the resource and carbon constrained world that will increasingly be the reality we all – and not least the energy sector – will be facing as we get further into the 21st century.

“Conventional power plants
have to be **ready** to step in
flexibly, reliably and efficiently
to ensure **electricity supply**
and **grid stability.**”

Franz-Josef Mengede, EPPSA President

Franz-Josef Mengede,
EPPSA President



Patrick Clerens,
EPPSA Secretary General



■ Europe's ambitious climate and energy targets towards 2050 cannot be met without deploying more efficient energy technologies.

Fossil fuel consumption is increasing all over the world, even in countries and regions with carbon-cutting targets. In the US, shale gas has increased the gas-based power generation whereas the lower coal consumption in the US triggered a price decrease on the global coal market.

EPPSA believes that in order to boost competitiveness, to provide adequate security of supply and to safeguard the sustainability of the energy system, the solution is to have well-balanced market conditions for all generation technologies. There is a necessity for a compatible, fair and standardised regulatory framework for the policy on decarbonisation of the energy sector. If the European industry wants to stay

competitive with low electricity prices, this is vital. In order to have more renewable sources in the grid, conventional power plants have to be ready to step in more flexibly and efficiently, with their well-known high reliability, to ensure uninterrupted electricity supply. They, therefore, ensure the required grid stability for the security of the whole system when variable renewable energy sources are not able to deliver.

Since fossil fuels will remain part of the future energy mix in Europe, it is important to deliver clean conventional power plants. Carbon Capture and Storage (CCS) is seen as one of the most promising solutions to reduce CO₂ emissions. CCS is essential if we aim to cost-effectively stabilise greenhouse gas (GHG) concentrations in the atmosphere at an acceptable level and meet the reduction targets by 2050. Therefore, EPPSA believes that continuous

investment and scale-up of CCS technologies by 2015, to be able to equip all fossil-fuelled power generation plants with CCS, is required to make Europe a world leader. Funding, a comprehensive legal framework and public support are needed to make CCS commercially available.

EPPSA believes there is a vital role for flexible and efficient conventional power generation in a low-carbon energy system to secure grid stability. EPPSA therefore strongly urges the European Institutions and national governments to, when defining Europe's energy regulatory framework, take into consideration the CO₂ reduction targets combining the highest possible share of renewable energy sources and the reality of increased need of conventional power for the stability of the power system.

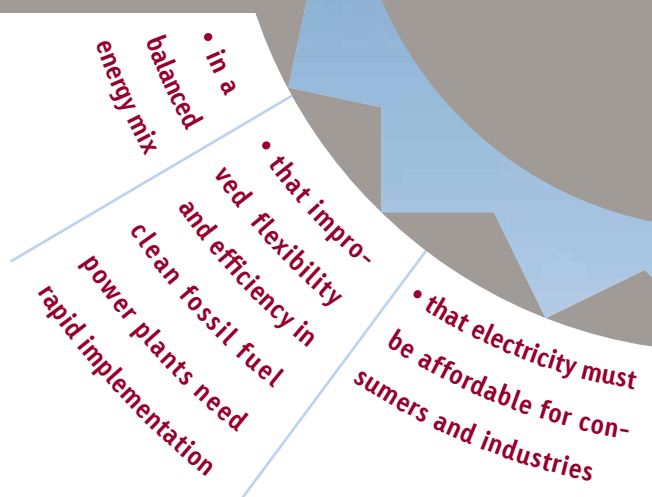
Two handwritten signatures in blue ink. The first signature on the left is 'F. Mengede' and the second signature on the right is 'P. Clerens'.

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 not one, ideal energy source.

- **that improved flexibility and efficiency in clean fossil fuel power plants need rapid implementation.** Flexibility and efficiency improvement in both new and existing plants is the decisive factor to preserve scarce natural resources and to achieve CO₂ reduction targets.

- **that electricity must be affordable for consumers and industries.** Electricity in the EU must be affordable for consumers and industries to remain at the forefront of competitiveness in a global dimension.



EPPSA Key messages

- that increased investment in Research, Development & Demonstration 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 & Demonstration 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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“To boost competitiveness
and to provide security
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well-balanced market
conditions for all generation technologies.”

Patrick Clerens, EPPSA Secretary General

Communications Activities

■ Technology Evening 2012

The sixth edition of the Technology Evening was held under the motto: **Energy Mix: Need for Public Acceptance**. Once again the event gathered key stakeholders in the European energy community where EPPSA President, Franz-Josef Mengede (ABB Group Senior Vice President and head of Business Unit Power Generation) explained that energy efficiency & renewables could deliver 2/3 of the required emissions reduction. He emphasised the boundaries that power plant suppliers face, meaning the complexities of the new power landscape with this growing integration of renewable energy sources (RES) in the European energy mix. Mr Vinois, Acting Director Internal Energy Market of DG Energy at the European Commission, examined the key requirements for creating the right framework for power investments in the European Union. Mr Vinois welcomed the efforts by EPPSA and its members towards research, development and demonstration into the power generation technologies of the future. The following two speakers from the University of Stuttgart and the European Public Services workers Union discussed the societal challenges of increasing energy prices and therefore public acceptance dimension rising from the development of new technologies such as Carbon Capture and Storage and the integration of RES. The audience was then taken away in a well orchestrated business theatre: Who needs Energy?

■ 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 2012

“Coal: Here to Stay” was the motto of this year's Coal-Gen held from the 13th to the 16th of February in Warsaw, Poland. EPPSA participated in the Plenary Session on: **Can Coal Help Fill Europe's Nuclear Energy Gap?** and EPPSA Secretary General Patrick Clerens described the “EU and Power Generation: a Love and Heat Relationship” where he discussed the latest updates on EU policy making in Brussels regarding coal. COAL-GEN Europe is designed to inform the general public about European coal-based energy as well as to lead the way towards zero emissions and carbon capture and storage technologies.

■ International Power Summit 2012

This year's International Power Summit 2012 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 infringement to Intellectual Property Rights on power plant operators and suppliers as well as to discuss the public acceptance issue for the power generation technologies of the future.



Mr Vinois, Acting Director Internal Energy Market of DG Energy at the European Commission



Champagne Raffle at Annual Technology Evening



Mr Clerens, Mr Mengede and Mr Vinois at the Technology Evening 2012

The Albert Hall Complex



Networking highlight at PowerGen 2012



EPPSA's booth at the VGB Congress, Mannheim

■ EU Sustainable Energy Week 2012

Organised every year by the European Commission, the EU Sustainable Energy Week hosts hundreds of events in the EU. This year's Energy week had more than 143 events taking place in Brussels and around 990 Energy Days took place across Europe. EPPSA co-organised with Eurogas and Gas Terra an event **Blue, Green and Gold: Sustainable and Competitive Energy for Europe** where EPPSA emphasised on the need for back-up power generation due to the intermittency of RES under the title: **Renewables's Peaks and Valleys: Ensuring Tomorrow's Grid Stability.**

■ Power-Gen 2012

POWER-GEN Europe, now in its 20th year, and Renewable Energy World Europe are events where power industry professionals can appreciate the big picture and truly engage with the vital move towards integrating the traditional

fossil fuel and fast-growing renewable generation sectors. This year's edition gathered more than 13,000 attendees from 105 countries around the globe. EPPSA was once again invited to chair different sessions such as **The Strategies for the European Power Sector** session as well as the strategic session on Energy Storage.

■ VGB Congress 2012

This year's VGB Congress was held in Mannheim, Germany. The topic this year was **"Security of Supply: Power Generation at the Crossroads?"**. This very technical conference reunites exhibitors from all over Europe and beyond and combines a very expert section with an informative exhibition level. In order to support and represent its members, the EPPSA Secretariat travelled to Mannheim and held an information stand on the exhibition floor.



EPPSA Secretary General, Patrick Clerens, at the EU Sustainable Energy Week

Round Table on Coal

Large Combustion Plants
BREF Review Process

Intellectual
Property Rights

Policy

Activities

EU-China Dialogue

Berlin Fossil Fuel Forum

European Technology Platform
– Zero Emissions Fossil Fuel
Power Plants



EPPSA Secretary General, Patrick Clerens, on EU Policies at CoalGen 2012, Warsaw

EPPSA team at PowerGen Europe, Cologne

■ Large Combustion Plants (LCP) BREF review process

The Large Combustion Plant Best Reference Documents (LCP BREFs) have a major impact on permits given to new power plants as it will become a binding legal document for permitting authorities involved in the construction or retrofitting of power plants in the European Union. Seen as a major stakeholder in the European power sector for conventional plants, the association has been involved in the process since its first version in 2006. From 2011 onwards, a review has been taking place and EPPSA has naturally been part of it when invited to the kick-off meeting held in Seville, Spain. In 2012, EPPSA continued its efforts to support the Commission with the questionnaires sent to a large number of conventional power plants in the European Union and with expert input on specific points.



Mr Clerens at the Press Briefing on IPR



Press Briefing IPR, Mannheim

■ 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 reply to these illegal practices, EPPSA proposed to establish an IPR Alliance, bringing a critical mass of stakeholders together to support a strong reply from the European decision makers. The Association organised an IPR press briefing in the context of the VGB Congress in Mannheim to support the creation of the IPR Alliance (www.ipralliance.eu). Furthermore

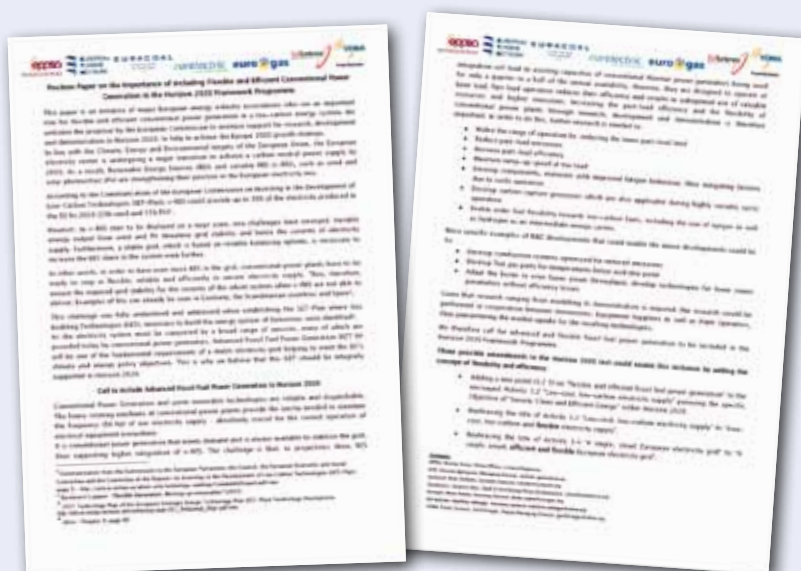
after EPPSA pushed for this platform, the first stakeholder exchange meeting was organised on the 11th December with the support of the association.

■ 8th EU – China Dialogue on IPR

EPPSA participated in the 8th session of the EU – China Dialogue on IPR held in September 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. EPPSA was invited to hold a presentation on IPR infringements cases endured by members of the association. This resulted in an extensive discussion between the secretariat, the European Institution representatives and the Chinese authorities.

■ Berlin Fossil Fuel Forum

The Berlin Fossil Fuel Forum is an important initiative from the European Commission that provides a prestigious platform for dialogue on policy and technological developments in fossil fuel related issues. In October 2012, EPPSA attended the Forum's eighth Plenary Session where discussions about the opening up of the Forum to other energy sources were triggered, as the need for a fair energy mix in the system is more and more acknowledged.



Position Paper on the Importance of Including Flexible and Efficient Conventional Power Generation in the Horizon 2020 Framework Programme

■ 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. Since 2005, EPPSA has also supported the ZEP Platform financially. EPPSA and its members attended the ZEP General Assembly, the Coordination groups and the ZEP's Advisory Council held in Brussels.

■ Flexible and Efficient Power Generation

Under the lead of EPPSA, the major European associations representing the energy industry came together to call for the European Commission to include advanced flexible and efficient power generation from conventional thermal power plants in its new research and innovation framework programme, Horizon 2020 (2014 – 2020). As a major contributor in the energy system of Europe, conventional power will remain in the heart of the electricity generation for the years to come and EPPSA initiated this call to raise awareness on the Brussels and European scene of the important role for flexible and efficient conventional power generation in a low-carbon energy system.

■ 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. Through its Secretary General, the association was invited to present the industry's view on flexible and efficient power generation in the Horizon 2020 framework programme of the European Commission.



The ZEP General Assembly

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
Carmeuse



Franz Bartels
Clyde Bergemann



Pierre Melin
CMI Energy



Jill Duggan
Doosan Power Systems



Tomas Harju-Jeanty
Foster Wheeler Energia



Klaus-Dieter Tigges
Hitachi Power Europe



Bob McCabe
Howden Group



Paolo Magaldi
Magaldi Power



Mervyn Sambles
Fluor



Giuliano Cavagnoli
Nooter/Eriksen



Gianni Casero
STF BWE



Stephan Bergmans
Stork Thermeq



Rainer Redinger
TLT-Turbo



Karel van Buuren
NEM



Meeting of the Technical Committee at NEM Energy, Leiden, July 2012

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

Working in relation with the different working groups established within EPPSA such as the Power Plants Efficiency Improvements and Flue Gas Cleaning working groups, the Technical Committee produced in 2012 a number of position pa-

pers, e.g. on the importance of including flexible and efficient conventional power generation with the support of the major European association. Another important topic tackled by the Technical Committee referred to the European Commission's Energy Roadmap 2050 on which the association published a position paper with the support of the Public Relations Committee.

This year again, the LCP BREF Working Group worked on the reference document on Best Available Techniques (BATs) for Large Combustion Plants (LCP BREF) as its revision by the European Commission was launched mid March 2011 and will be carried out until 2014. In October 2011 EPPSA participated in the kick-off meeting that



Technical Committee meeting at EPPSA offices in Brussels, November 2012





Technical Committee meeting at ANDRITZ Energy & Environment GmbH, Graz, March 2012

The Technical Committee

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 the industry. In 2012, 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. Furthermore, EPPSA in close cooperation with its members developed a list of best reference power plants where the best available techniques and technologies developed to date by European technology suppliers are being used.

The Flue Gas Cleaning Working Group came under new chairmanship in the year 2012.

Dr Reissner from Andritz Energy & Environment took the lead on a working group that focuses its attention on the classical emissions to air, e.g. sulphur, nitrogen and dust, but also looks at mercury and carbon dioxide capture-related issues. Monitoring the evolution of the debate on these topics both at a European and International level is part of the work. Because of its expertise, EPPSA was contacted in order to deliver technological solutions and qualified information on mercury and other emissions and by-products. 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.

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.

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 and Workshop at ANDRITZ Energy & Environment GmbH, Graz





Public Relations Committee meeting developing the new Media Task Force (MTF), Graz

■ Chaired by Ms. Annette Titzmann from Alstom Germany, the PR committee is composed of a useful blend of communications 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. 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.

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 task-force answering to the Committee resulted in a sound Technology Evening with, for a second year in a row, a successful business theatre mixing two games "who wants to be a millionaire" and "questions for a champion" ensuing in: **Who needs Energy?** focusing on conventional power technologies in the energy mix.

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, VGB Congress and Coal-Gen Europe proved to be invaluable means to reach a wider audience and promote the association's message of clean and secure energy from fossil-fuel power generation.



Public Relations Committee working on the new communications material of EPPSA, Brussels, November 2012



Public Relations Committee

Working in synergy with their colleagues of 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. In order to have this close partnership between the Technical Committee and the PR Committee in the future, it was decided that from 2013 on, these two committees will have common sessions and specific break-outs depending on the topics.

Business Theatre at the Technology Evening 2012



Annual Technology Evening



■ 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.

EPPSA Secretariat

■ EPPSA's Secretariat is the bridge between the member companies and the EU institutions. It consists of on the one hand the Secretary General and on the other hand the Policy Officer, supported by a Policy Assistant. Together, they monitor EU legislation concerning energy and funding opportunities. The secretariat promotes the awareness of the positive implications of technologies in conventional power generation.



■ 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 the pharmaceutical and banking industries. As **Policy Officer**, he is in charge of coordinating the legislative, lobbying, communications and public relations activities of the association.



■ Julie Van Spaendonck is the current **Policy Assistant** at EPPSA and is responsible for all facets of the association's public relations and interaction with the members. She joined EPPSA after completing her Master in Applied Economics and European studies at the University of Leuven.



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Inspire the Next

FLUOR

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