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Energy transition in the Western Balkans

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Western Balkan countries have neglected the modernisation of their energy sector for decades, with creaking coal plants the dominant form of power generation there. As Europe moves forward with its Green Deal, the region now needs to redouble efforts or risk being left behind.

In this special report, EURACTIV looks at the challenges faced by Western Balkan countries in the transition to clean energy.
EU’s carbon levy poses new test for Western Balkan integration

Official: Western Balkans’ overdue energy transition ‘needs to happen fast’

The EU must adopt a radically different approach towards labour migration
EU’s carbon levy poses new test for Western Balkan integration

By Kira Taylor | EURACTIV.com

Languages: Deutsch

The European Union’s newly agreed carbon border adjustment mechanism (CBAM) will likely test Western Balkan countries vying for bloc membership as they seek to align themselves with the EU acquis.

Last year, the EU agreed to implement the world’s first levy on imports of carbon-intensive goods as a way to incentivise its trade partners to have stronger climate policies and to protect its industries.

The measure will start to bite from 2026 and will include imports of carbon-intensive power, which could see a hefty levy on Western Balkan electricity entering the EU.

“This was a good wake-up moment for the region,” said Pippa Gallop, Southeast Europe energy advisor from the NGO CEE Bankwatch, speaking at a panel discussion hosted by Friedrich-Ebert-Stiftung Dialogue Southeast Europe.

“Before, it was always really up to them how fast they want to advance their EU accession, how fast they want to go with the whole energy transition, but CBAM, because it’s an instrument, which is decided in the EU by the EU, this changed the whole setup,” she added.

Western Balkan countries now face three options. They can do nothing and face the CBAM levies from 2026, introduce carbon pricing to match EU climate policy and avoid it or take advantage of an exemption in the legislation to give breathing space until 2030.

“None of them are very easy choices, and all of them require a lot more action and a lot more attention to this topic,” said Gallop.

Not introducing a carbon market will mean revenue that could be made by the government and reinvested in renewable, domestically-produced power will go to the EU instead, said Peter Pozsgai, a governance expert at the Energy Community Secretariat, which works with Western Balkan countries on the green transition.

Carbon pricing could also help create financing for the transition. According to CEE Bankwatch, if the Western Balkan countries
introduced carbon pricing at €50 per tonne – considerably less than the current price – they would raise around €2.8 billion annually.

Meanwhile, choosing the loophole of coupling its electricity system with the EU’s to avoid CBAM levies requires a country to sign up to comply with EU environmental and competition law in the electricity sector and set up an emissions trading scheme by 2030.

This exemption exists as there is no technical solution to tracing where electricity comes from once a country is linked to the EU grid, but this loophole could close if one is found.

**Impact of CBAM will vary across countries**

Altogether, the Western Balkans exported 25 terawatts of power to the EU between 2018 and 2020, equalling 8% of total coal-fired generation in the region, according to Bankwatch.

Due to artificially low prices in the Western Balkans, exporting power to the EU market brings higher profits for companies.

The impact of CBAM will vary between Balkan countries, which have different levels of power exports to Europe and progress on climate policies, like introducing a price on carbon emissions and phasing out coal.

North Macedonia is a net electricity importer and between 2011 and 2020, exported 38% of its average annual share of electricity to the EU. The country has pledged to close its coal power plants by 2027, meaning it would only briefly be impacted by CBAM if the phase-out is a success.

Meanwhile, in recent years, Montenegro’s exports to the EU majorly increased when an undersea cable to Italy entered into operation. In 2020, the country exported more than 1,600 gigawatts of electricity, equalling more than 50% of its entire generation.

The country has attempted to set up a carbon market, but in its current state, it would not be sufficient to avoid CBAM, according to Gallop. Alongside this, around 40% of Montenegro’s power generation comes from the Pljevlja coal plant, which is operating illegally after its allocated operating hours expired.

Bosnia and Herzegovina would likely be very affected, with about 20% of its total electricity production exported to the EU, based on 2011-2020 figures. In 2020, 70% of the country’s power generation is from coal, which would attract a hefty levy.

Serbia’s power generation is also heavily reliant on coal, but it has limited exports to the EU, so is unlikely to be massively hit.

In 2020, Kosovo’s power generation almost completely came from coal, but due to minimal EU links, there will be no impact for now.

Albania is also unlikely to see a huge impact as the country exported 7% of its total generation between 2011 and 2020, and none of this came from coal. However, it would apply if the country builds a gas power plant as planned.

**Response to CBAM decides Balkans’ geopolitical future**

According to German lawmaker Delara Burkhardt, how the Western Balkans respond to the levy and progress with their climate legislation also impacts their geopolitical future.

“The path of the green transition is the path to the EU, and the path not to the green transition is to another geopolitical context, is going to China and Russia,” she explained at the panel discussion.

But the EU also has a role, she added, saying that the EU needs to make the green transition a core part of its neighbourhood policy, including adding green strings to the funding going to the region.

CEE Bankwatch is also advocating for a fund to aid the transition and ease its societal impact in the Balkans, particularly in regions where coal mining and power production is a vital part of the economy.

“There hasn’t been a move yet to use the actual CBAM revenues for this, but irrespective of that, EU funds could be used for this purpose,” said Gallop, adding that where there is funding, there is political will.

In doing this, though, the unintended consequences of a rush into renewables need to be avoided, said Pozsgai, pointing to already existing green power projects, particularly hydropower, that have created environmental issues in the Balkans.

In the run-up to 2026 and CBAM coming into force, Western Balkan countries will have to decide how to respond to the levy.

Launching a carbon market could help provide funds vital to the rollout cheaper, domestically-produced renewable energy and lower Balkan dependence on countries like Russia and China. Meanwhile, not following the EU’s climate policy could come at a heavy cost.
Irrsponsible management and the political imperative to keep retail prices low have left energy utilities in the Western Balkans without the will or means to invest in new power generation and diversify away from coal, says Dirk Buschle.

Dirk Buschle is the deputy director of the Energy Community Secretariat in Vienna. He responded in writing to questions from EURACTIV.

German Chancellor Olaf Scholz hosted a summit of Western Balkans leaders on 3 November in Berlin, where a Declaration on Energy Security and Green Transition in the Western Balkans was adopted. What is your main takeaway from that meeting?

The Summit put focus on a triple challenge for the Western Balkans, which are interlinked on many levels. They all require urgent responses. These are the energy, the climate and the investment crisis. The same triple crises evidently affect the rest of Europe as well, even if the Western Balkans’ exposure is higher.

The energy crisis, imported from the outside to the region, manifests itself as an affordability crisis for the developing economies in the region, at least for those countries depending on electricity purchases at high European market prices.

The climate crisis is of global nature but affects South East Europe harder...
than other regions in Europe because of its geography. It also further reinforces the energy crisis due to global warming’s adverse impact on hydrology.

Only the last one, the investment crisis, is truly homemade.

Most countries in the Western Balkans have neglected the modernisation of their energy sectors over decades. Irresponsible management and the political imperative to keep retail prices low left the utilities without the will or means to invest in new power generation, let alone to diversify away from coal. This has the effect that most of the existing power plants are close to or beyond their maximum lifetime. It also brought some utilities to the brink of collapse.

In Berlin, the leaders gave important responses to the region’s triple challenge.

The overdue modernisation of the energy sectors needs to happen fast, and in times of the European Green Deal cannot be anything but green. This massive energy transition, which needs to include the replacement of coal by renewable energy while maintaining supply security, can only happen if regional cooperation and coordination replaces the illusionary strife for autarchy and the fragmentation of markets.

No country in the region will manage the transition by itself, and if so at disproportionate financial and social costs. And the financial support to be expected from the EU and others should be targeted specifically to support projects and measures aimed to promote the transition.

These conclusions, together with a number of very concrete commitments by the Western Balkan leaders and their European counterparts, make last week’s Berlin Declaration an important milestone, including for the Energy Community.

What impact has the war in Ukraine and the energy crisis had on the Western Balkans? Is it speeding up or slowing down the energy transition?

As everywhere else on the continent, the war in Ukraine is a sea change for the region. The European Union and the Western Balkans have come to realise, beyond the usual rhetoric, that they truly depend on each other and share the same destiny, Europe.

The interdependencies are particularly obvious in energy and climate policy, based on shared experiences and challenges which do not differentiate between those in and out of the EU. At the peak of the crisis, we witness the same, almost intuitive response patterns which aim at restoring a stable and affordable energy supply quickly, often relying on coal, also in the Western Balkans.

But a coal renaissance can only be of a temporary nature. It will not be economically viable in the mid- to long-term. This was an experience Germany made after the 1973 oil crisis, and the discontinuation of what could have been the last new coal-fired power plant project in Europe, Tuzla 7 in Bosnia and Herzegovina, suggest the same.

How much progress have Western Balkan countries made in phasing out coal and moving towards clean energy sources like renewables? What more can be done to accelerate this transition?

Progress has indeed not been enough. The transition challenge is largely one of how to accelerate the uptake of renewables. It will require significant efforts in a number of areas, many of which have been relied upon already by the European Green Deal but not, or only rudimentarily, been incorporated in the Western Balkans.

The most basic reform step, which the Energy Community will take still this year, is the creation of organised wholesale markets for electricity and their coupling on a regional level and with the EU’s. This opens new outlet markets for renewable energy production in the Western Balkans, which otherwise would be limited to small national markets. It also allows governments to design their support schemes in a manner reducing budget exposure, for instance through contracts for difference.

To further boost the development of renewable energies, an enabling framework, including a functioning system of trade in guarantees of origins across Europe, or functioning balancing and intraday markets, is required. The set of policies and measures depends on targets and robust planning, namely through the national energy and climate plans to be adopted under the Governance Regulation.

And eventually, pricing in the externalities of pollution and carbon emissions – in other words, a regionally coordinated carbon pricing mechanism to be eventually integrated in the European Union’s ETS – will have to be designed, prepared and gradually implemented following the Energy Community’s Decarbonisation Roadmap of 2021.
The EU is currently discussing a carbon border adjustment mechanism that would add a levy to carbon-intensive electricity imported into the European Union. How will this impact the Western Balkans and what could the EU do to soften the blow?

The European Union's CBAM will evidently affect those economies which export electricity without pricing in the carbon emissions from its production. In the Western Balkans, the most prominent case is Bosnia and Herzegovina.

The CBAM should be understood as a wake-up call for the affected economies to start introducing carbon prices and use the revenues from those schemes for the promotion of their transition at home, rather than transferring them to Brussels.

In its current version, the CBAM proposal rightly insists on an ambitious carbon price level as a prerequisite for an exemption but also acknowledges that the power systems of the Western Balkans will soon be coupled with the rest of Europe, unlike those of other non-EU countries.

To manage the unique relation between the Contracting Parties and the European Union in that respect will require a special focus by the Energy Community once the CBAM regulation is adopted.

A report published last year found that, in 2020, sulphur dioxide emissions from coal power plants across the Western Balkans breached legal limits. What can be done to reduce these emissions and improve air quality in the region?

Pollution is one of the biggest problems in the Western Balkans. The Secretariat follows up on breaches of the environmental norms systematically by launching infringement procedures.

But the Energy Community enforcement system is based on declaratory and political relief rather than on straightforward remedies such as penalties and compensation.

Until the situation has improved, it is for other actors – donors, the European Union but also national courts and tribunals – to follow up and draw the appropriate consequences from the finding of a breach of the Energy Community rules.

The Western Balkans have had issues with hydropower damaging the environment. How can these energy sources be rolled out in a way that doesn’t cause environmental damage?

Decarbonisation means that hydropower as part of a country’s energy mix cannot be rejected per se. Yet many river systems of the Western Balkans are of an extraordinary ecological value, which should be preserved.

Especially small hydropower plants yield normally little in energy production compared to the loss in biodiversity they often cause. By contrast, the repowering of existing large hydropower has a much more positive cost-benefit ratio. The proliferation of small hydropower installations should also not be encouraged by support schemes such as feed-in tariffs.

In any event, the procedural instrument capable to strike the right balance between costs and benefits is the environmental impact assessment procedure. This procedure can promote transparency, legitimacy and true environmental democracy – but unfortunately not always lives up to that expectation in the Western Balkans. The many complaints submitted to the Energy Community Secretariat testify to that.

What changes need to be made to energy infrastructure like electricity or gas networks, to enable the energy transition in the Western Balkans? How much would this cost?

The rapid deployment of more renewables definitely requires investments in the power system. Not so much in interconnectors between countries though, where physical capacities exist but are significantly underused.

Investments are needed in the transmission and distribution networks on the national and local level. The latter is particularly important to tap into the still huge potential for boosting rooftop solar for self-consumption and feeding back into the grid.

The further development of the gas network is a different matter, as investments need to factor in the risk of stranded assets in a decarbonized system. Again, European law makes available instruments which can support taking the right decision on a case-by-case basis, in this case, the so-called TEN-E Regulation.
Europeanization or marginalization?

Despite the European Union’s (EU) emphasis on the free movement of workers within the EU as part of the “Europeanization” of migration policy, national borders continue to shape various forms of precarious employment and precarious lives.

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Workers from different national backgrounds continue to face serious obstacles, as illustrated by the example of workers from the Western Balkans, highlighted in the report "Workers without borders? The rights of workers from the Balkans in the EU", and further discussed and validated at the Migrant Workers’ Advocacy Roundtable on November 3rd, 2022 at Friedrich-Ebert-Stiftung in Berlin, organized in cooperation with European Alternatives. This article highlights the report’s and roundtable’s findings and illustrates the challenges that workers
Second-class workers: migrant work as precarious work

As a result of visa liberalization by the EU, Western Balkans citizens find themselves in a partly privileged position compared to so-called third-country nationals. Still, unlike EU citizens who are entitled to fair and equal treatment as nationals of host countries, workers from the Western Balkans accession countries still experience obstacles in accessing employment, fair remuneration, labour rights, and proper protection. They are mainly engaged through non-standard short-term contracts that do not guarantee the same scope of labour and socio-economic rights as in the case of standard (domestic) EU workers. While the latter are generally engaged through full-time contracts of indefinite duration that provide social security, regular income, and full range of labour rights and protections, the former is characterized by employment and income flexibility as well as reduced social security.

Atypical or non-standard employment is precarious employment, which should be understood as the opposite of decent work, i.e. employment that includes adequate wages for the work obtained, occupational health and safety at the workplace, as well as social, health and unemployment protection for the employee and his/her family, in addition to prospects for personal development and social integration. The report clearly confirms that migrant workers are more exposed to non-standard work arrangements than EU nationals.

Non-standard work arrangements limit access to trade unions

Workers who shared their experiences with the research team were mainly engaged on the basis of temporary contracts, as seasonal and agency workers, but there are also cases of undeclared work. They all share vulnerabilities based on the temporary nature of employment, including limited access to social security, health protection, and unemployment benefits. As previously mentioned, there are also obstacles when trying to organize in order to negotiate better working conditions – workers engaged through short-term contracts (or on probation time below 6 months in the case of Germany) have limited access to trade unions and other forms of workers representation, such as workers councils.

Limited access to social security

Administrative barriers allow only limited access to social benefits – access is limited by the provisions of minimum periods of employment, a problem especially obvious in the case of seasonal workers. In order to claim benefits, seasonal workers must prove their employment and social contributions payment history, which is often not possible due to the fact they have long breaks between their work assignments in host countries. Social security systems within the EU are not sufficiently coordinated which additionally complicates the transfer of benefits, as these workers frequently switch between EU member countries. Even when seasonal/short-term workers manage to claim their rights and go to court, the compensation might only be applicable to them after many months of battling in court. By that time, the workers might have been unable to stay in the hosting country due to the high cost of living and visa issues that arise after losing a job and might already have had to move elsewhere. Besides, due to the temporary nature of stay, member states do not need to apply an equal treatment of seasonal workers in regard to unemployment and family benefits and may limit equal treatment on tax, benefits, education, and vocational training.

Current visa regulation facilitates exploitation

Both workers and trade union representatives interviewed spoke of workers' dependency on the employer that emerge due to restrictive visa policies, preventing workers from switching between jobs. As work and residency permits are issued for the period agreed in the labour contract with the “first employer”, workers are inclined to agree to working conditions that might not be considered decent in terms of work time, salaries, housing standards, etc., in order to keep a job and a working permit. Those who dare to exit exploitative employment relationships and manage to find a new job are not necessarily lucky enough to find a new employer willing to enter the process of a new visa application, as it was the case with a chef who shared his story.

Dubious actors: the shady business of employment agencies

Administrative issues and obstacles continue to pile up when employment agencies step in. In order to avoid visa complications, workers rely on services provided by temporary employment agencies whose business practices are often highly dubious and sometimes even against the law. When it comes to agency employment, workers face the following paradox – for many, agency employment is often the only way to find legal employment in the EU, while at the same it is the fastest and easiest way to end up working illegally. Workers and human trafficking experts confirmed that most employment agencies are not trustworthy actors. According to one respondent, “If the agency fulfils 70 per cent of what has been agreed, you can consider yourself lucky”. There are numbers of “fake agencies”, i.e. unregistered businesses or individuals stepping in as mediators between foreign employers.
and workers. They often breach the law through various malicious practices ranging from sending workers to work illegally (without the contract and/or on a tourist visa), offering contracts in foreign languages (misleading people by making them agree to the provisions contradicting domestic and/or labour laws of the host country), and leaving workers unprotected and without counselling support once the post is taken. These trends are not unknown and do get reported – media e.g. in Serbia, as well as legal experts and civic organizations have been raising it as an issue for a while. Nevertheless, it would need a collaborative action of authorities of home and host countries in order to tackle problematic issues, as this is still an area that is regulated nationally.

**The structural dimension of an exploitative labour migration system**

Besides the legal and administrative barriers, the socio-political and economic context in which migration takes place represents another important factor shaping migration patterns and experiences of migrant workers in general. Taking the Western Balkans as an example, the report stresses that current migration patterns are shaped by several factors: A worsening socio-economic and political situation in home countries, decreasing labour standards, lacking employment opportunities, and deteriorating quality of life are considered as main reasons for leaving the region and looking for employment opportunities abroad. At the same time, approaches of richer EU countries also influence growing emigration. For decades, they heavily relied on migrant labour in order to fill their own labour shortages and have adopted various measures in order to liberalize visa procedures and facilitate access of Western Balkans workers to their national labour markets. These processes produced dubious effects regarding the prospects for the economic recovery of home countries and the workers’ socio-economic security in the host countries’ economies.

Regardless of the type of contract signed, professional or educational background, all workers included in the report share similar motivations to leave their country of origin. These include low salaries, weak labour standards, and weak socio-economic protection, as well as the absence of professional and social recognition. Ironically, finding employment in the EU makes them not less vulnerable – due to economic/financial pressure, they tend to accept almost any working conditions, as long as economic benefits are to be expected. In many cases contracts migrant workers sign are just a simulation of regulated and decent work. There are registered cases of people in the report, who, upon arrival, started working under completely different conditions than previously agreed upon in the contract, working unpaid overtime and being paid lower salaries. For example, one of the nurses interviewed was required to provide cleaning services at the patient’s private home. In other cases, migrant workers have been denied rights guaranteed by the law, including paid holidays, sick leave, or regular breaks during the workday. Their quality of life is also influenced by low standards of accommodation (being
While remote work is commonly associated with jobs and sectors that require higher qualifications such as IT, creative industries (writing, translation etc.) or administration, it is also a highly disputed issue due to the numerous uncertainties and irregularities it produces, both in terms of quality of employment and the tendency to generate undeclared work.

**Young and skilled but still vulnerable**

Although the problems mentioned are somewhat typical for low-skilled workers engaged in sectors such as hospitality, construction, and especially care work, they are also experienced by those taking positions that demand higher educational and professional qualifications. Young and well-educated workers from accession countries have been encouraged to move to the EU by study visa liberalizations that opened up prospects to exit the precariousness they face at home by moving abroad, hoping their skills would be recognized and remunerated adequately. Nevertheless, they have been facing similar challenges: Due to the lack of work experience, complicated diploma recognition procedures, insufficient language skills, and economic urgency they often face discriminatory treatment by employers that pushes them to accept flexible working arrangements and jobs for which they are often overqualified. Similarly, due to the lacking employment opportunities, a growing number of highly qualified workers from the Balkans have been forced to look for a job in the online economy.

**The impact of COVID-19**

The Covid-19 pandemic accelerated these trends as migrant workers who returned to home countries continued working for foreign employers or by providing services to clients online. Although they do not physically emigrate, these highly mobile workers have been virtually moving across borders, finding jobs in the EU and internationally, either through online platforms or online labour markets. While remote work is commonly

from the 70s onward. Following these trends and its national economic demand, over the years Germany adopted various measures and signed bilateral agreements with Western Balkans countries aiming to facilitate the issuance of working and residence permits. Concerned by the so-called migration crisis in 2015, Germany took a step forward in this direction by adopting the rather problematic ‘Western Balkans Regulation’. The regulation has been introduced as a means to reduce the number of asylum seekers from the region and to ‘re-route’ so-called “irregular migration flows” via the Balkan route. It is part of a wider political agreement with Western Balkan countries to take a more prominent role in managing the EU external borders with regard to migration movements. These measures contribute to lowering the thresholds for issuing working permits to Western Balkans workers on the one hand, but on the other, they do not break with the practice of putting these workers in a disadvantaged position regarding access to adequate and decent employment. According to representatives of the German Trade Union Confederation (DGB), the regulation brings no significant improvements in areas which trade unions consider crucial, including workers’ dependency of potentially abusive employers as residency and working permits are still dependent on the contract with the ‘first employer’. Other issues are limited access to institutional protection and collective bargaining, and providing information mechanisms suited according to the specific needs of workers engaged through this specific scheme.

**What are the next steps towards a borderless Europe?**

Even though the EU recently started to work on a revised long-term and single permit directive to improve migrant worker’s mobility and equality with the national labour force, the EU and its member states must progress
to adopt a radically different approach towards labour migration to improve the work and life situation of migrant workers. This would include decisiveness to provide equal standards of employment and protection of all workers regardless of their national origin. That migrant workforces are at serious risk of being exploited in the EU, is also acknowledged by European Union Agency for Fundamental Rights (FRA). The adoption of a people-centered approach in designing migration policies (focusing more on workers’ needs instead of satisfying the need for capital for accumulating profits through lowering labour costs by engaging the cheap and unprotected migrant labour force) is needed, as well as a major shift in cooperation aiming to address problems of uneven and unfair economic development between the EU and its periphery.

On a more operational level, it would include a transnational policy approach in regulating specific areas of work such as agency employment, all kinds of mediation and subcontracting arrangements, online and platform work, and measures addressing undeclared work. All workers should be guaranteed long-term socio-economic protection and immediate measures must be adopted in order to ensure it, including an EU-wide regulation on minimum wages and unemployment insurance that would be applicable to all workers regardless of their national background and the type of employment contract. Besides, bridging the gaps in providing social security coverages should include advanced mechanisms of coordination between national authorities, if not the possibility to issue a European social security number to non-EU nationals aiming to help migrant workers know where and when social security contributions are being made by their employers. Whether the European Labour Authority (ELA), established in 2019, will play a central role here remains to be seen.

Much of the existing deceptive practices could be prevented if employers would be obliged to provide job contracts in the language understood by the migrant worker if a well-designed mechanism for acquiring information about the employers and the rights agreed in contracts existed, and if there were mechanisms of supervision over employers and agencies on the EU level. More advisory centres in home countries should be established in order to provide support to aspiring migrant workers on the problems, rights and duties to be expected when moving abroad. Additionally, these advisory centres should cooperate transnationally with each other and the competent institutions enforcing those rights. Moreover, host countries should participate financially in providing this kind of support.

It is also important to strengthen international trade union cooperation that would encompass opening up trade unions to more flexible forms of membership. Also, the implementation of support mechanisms tackling specific needs and vulnerabilities of migrant, mobile, and marginalised workers, as well as international campaigning for better working and living conditions for all workers without difference would be great steps ahead in the protection of migrant workers, bearing in mind that trade unions will continue playing a decisive role in future struggles for decent work and building solidarities between workers across and beyond borders.

About the author:

Aleksandra Lakić is a sociologist with a background in political sciences. She graduated from the Faculty of political sciences at the Belgrade University, and received her master’s degree in social sciences at the Humboldt-University of Berlin, specializing in the field of migration, integration, and asylum policies in the EU and Germany. During her stay in Berlin, she worked as a research assistant at the Berlin School of Economics and Law, on the project regarding the labour market integration of migrants in Germany. Aleksandra currently lives in Belgrade, where she works as a researcher and program manager at Zajedničko Platform, exploring economic models and practices tackling the problem of labour market transformation and non-standard work.
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