

# European Renewable Energy Markets

> Policy > Price > Performance

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26-27 January 2012 • Kempinski Hotel Bristol • Berlin, Germany

Hear from the industry's leading organisations including:

- European Renewable Energy Council (EREC)
- Enel Green Power
- E.ON Climate & Renewables
- RWE Innogy
- Vattenfall
- EDP Renováveis
- Landsvirkjun
- Statkraft
- European Commission
- European Renewable Energies Federation (EREF)
- European Wind Energy Association (EWEA)
- European Photovoltaic Industry Association (EPIA)
- REN21
- Mainstream Renewable Power
- Solarcentury
- Aquamarine Power
- Friends of the Supergrid
- TenneT
- AES European Wind Generation
- Ennoviga Solar
- Barclays Capital
- Green Giraffe Energy Bankers
- Platts

Opening address by:



Prof. Arthouros Zervos, President, European Renewable Energy Council (EREC); Chairman and Chief Executive Officer, Public Power Corporation, Greece

Just some of the industry leading speakers confirmed:

- Francesco Starace, Chief Executive Officer, Enel Green Power
- Mike Winkel, Chief Executive Officer, E.ON Climate & Renewables
- Dr. Hans Bünting, Chief Financial Officer, RWE Innogy
- Göran Lundgren, Vice President, Business Unit Biomass, Vattenfall
- Oluf Ulseth, Chief Executive Officer, Energy Norway, Member of the Board, EURELECTRIC
- Claude Turmes, MEP, Vice-Chairman, Group of the Greens/European Free Alliance
- Christian Kjaer, Chief Executive Officer, European Wind Energy Association (EWEA)
- Hörður Arnarson, Chief Executive Officer, Landsvirkjun
- Eddie O'Connor, Founder and Chief Executive Officer, Mainstream Renewable Power
- Jeremy Leggett, Founder and Executive Chairman, Solarcentury; Founder and Chairman, SolarAid
- Martin McAdam, Chief Executive Officer, Aquamarine Power
- Hans Van Steen, Head of Unit Regulatory Policy and Promotion of Renewable Energy, European Commission

Key areas to be explored:

- **Receive** a comprehensive overview of the European renewables market, its status and current challenges
- **Assess** the impact of regulatory uncertainty on investment patterns and supply chain signals
- **Learn** how European climate policy is changing in the wake of Fukushima and what it means for the market moving forward
- **Evaluate** the attractiveness of European nations for renewables development
- **Understand** how key projects are developing within the region
- **Discuss** whether current subsidy levels are sufficient to achieve the goals
- **Hear** the very latest market information from the industry's leading utilities, analysts, manufacturers and regulators
- **Identify** if grid developments and capacity back up will happen in time
- **Discover** what the industry must put in place to attract institutional investors
- **Learn** where the next level of cost effectiveness is coming from

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Platts 2012 **European Renewable Energy Markets** conference will once again tackle the key issues facing the industry and bring together the European renewables community from utilities and manufactures to regulators and financiers in their effort to revolutionise the future European generation mix. The conference will provide attendees with a comprehensive overview of the industry and its current strength while highlighting policy directions, project case studies and finance flows. In addition, the event will tackle the sector’s key challenges from cost efficiency, infrastructure and planning, capacity back up and public support.

**Day one: Thursday 26 January 2012**

08:00 *Registration and continental breakfast*

08:50 **Chairman’s welcoming remarks**

09:00 **Opening address: European renewables development: Where are we and where are we heading?**

**Prof. Arthouros Zervos**, President, **European Renewable Energy Council (EREC)**, Chairman and Chief Executive Officer, **Public Power Corporation, Greece**

**Entering the mainstream: Meeting sustainability and economic goals while maintaining competitiveness – Leaders discuss**

09:25 **Keynote address: Thinking bigger – realising the potential of renewable power**

- How large has the renewable energy industry become?
- What is the degree of fragmentation in this industry?
- What is the main challenge to ensure steady growth going forward?
- How to manage the local dimension?

**Francesco Starace**, Chief Executive Officer, **Enel Green Power**

09:50 **Keynote address: Driving sustainability: How to make renewables competitive**

- Is the current state of subsidies purposeful and sustainable?
- Levers for cost reductions and performance improvements
- Challenges beyond the scope of the industry

**Mike Winkel**, Chief Executive Officer, **E.ON Climate and Renewables**

10:15 **Keynote address: Biomass, a sustainable renewable energy able to deliver firm power with existing power plants**

**Göran Lundgren**, Vice President, **Business Unit Biomass, Vattenfall**

10:40 *Networking and refreshment break*

**European renewable energy markets – Current status and future direction**

11:10 **20% renewables by 2020: The EURELECTRIC RES Action Plan**

- From the perspective of the European electricity industry:
  - What does it take to deliver on agreed targets by 2020?
  - How can the necessary flexibility be developed across Europe?
  - What are the longer term perspectives on development of renewables?

**Oluf Ulseth**, Chief Executive Officer, **Energy Norway**, Chair, **RES Action Plan** and Member of the Board, **EURELECTRIC**

11:35 **Facilitating the paradigm shift – How to develop market stability and implement a renewables based energy system**

- Are European energy markets ready for dominant shares of renewable energy?
- Will baseload capacity trigger or slow down renewables deployment?
- How should EU-renewables targets be developed until 2020 and beyond?
- How can national support mechanisms and European policy coordination be optimised to incentivise cost efficient and sustainable energy security?

**Rainer Hinrichs-Rahlwes**, President, **European Renewable Energies Federation (EREF)**

**The current and future regulatory environment: Is current policy sufficient to achieve a secure and sustainable energy future?**

12:00 **Realising EU energy potential: European Commission update**

- Policy developments from the European Commission
- Challenges faced and barriers to be overcome
- The drive for stronger targets and its impact on renewables development?
- What comes after the EU renewables directive?
- How to develop a binding 2030 target?

**Hans Van Steen**, Head of Unit Regulatory Policy and Promotion of Renewable Energy, **European Commission**

12:25 *Networking lunch*

13:40 **Panel discussion: Are current policies sufficient to achieve ambitious renewable energy goals?**

- What is the impact of regulatory uncertainty/change on investment patterns and supply chain signals?
- Are the current support levels sufficient to increase renewables deployment?
- Who should pay for new renewables development – State, utility or consumer?
- Are the regulators factoring in the positive externalities associated with renewables development?
- How has the financial crisis impacted renewable development in the region?
- Investment status of renewables infrastructure
- What must the industry put in place to attract institutional investors?
- Where is the next level of cost effectiveness coming from?
- Transmission and reserve capacity for renewable integration - Who is going to build it/fund it? When, where and how?

**Rainer Hinrichs-Rahlwes**, President, **European Renewable Energies Federation (EREF)**

**Hans Van Steen**, Head of Unit Regulatory Policy & Promotion of Renewable Energy, **European Commission**

**Francesco Starace**, Chief Executive Officer, **Enel Green Power**  
**Mike Winkel**, Chief Executive Officer, **E.ON Climate and Renewables**  
**Göran Lundgren**, Vice President, **Business Unit Biomass, Vattenfall**  
**Christian Kjaer**, Chief Executive Officer, **European Wind Energy Association (EWEA)**

**Moderated by: David R. Jones**, Editor, **Renewable Energy Markets, Platts**

**Mature renewable energy development in the region: Wind and biomass**

14:10 **Outlook for wind development in the region**

- Global wind power market trends
- Status and future prospects for European onshore and offshore wind power development in the context of the European Commission’s 2050 Energy Roadmap
- Wind power’s cost competitiveness and main drivers for wind power investments
- Grid infrastructure and market design

**Christian Kjaer**, Chief Executive Officer, **European Wind Energy Association (EWEA)**

14:35 **Case-study: Developing large scale wind projects in the UK – Challenges faced and opportunities arising**

**Tim Foster**, Head of Renewable Origination, **Statkraft UK**

14:55 **Case-study: Biomass usage on large scale**

- Refined Pellets: Leading biomass to a high tech fuel: Results of the large scale co-combustion testing in a coal power plant
- CO2 reduction potential and cost of co-combustion.
- The Economics of biomass in illiquid markets
- Sustainability of biomass: Is there enough in the future?
- Sustainability in practice: The agreement on sustainability between Vattenfall and Berlin

**Dr. Hans Dieter Hermes**, Director Business Development Biomass, **Vattenfall**

15:15 *Networking and refreshment break*

## Outlook and development of emerging technologies in the region: Geothermal, wave, solar, osmotic

15:45 **Developing geothermal and hydro projects in Iceland: Experience, plans and future development**

Hörður Arnarson, Chief Executive Officer, Landsvirkjun

16:15 **Taking wave power to the mainstream, Aquamarine Power strategy and the challenges faced**

Martin McAdam, Chief Executive Officer, Aquamarine Power

16:40 **Case-study: Understanding the development of osmotic energy in Europe**

Stein Erik Skilhagen, Head of Osmotic Power, Statkraft

17:00 **Case-study: PV's for industrial UK customers - Thames Water leading the way**

Stefano Gambro, Director, Ennaviga Solar

17:20 **Is large scale PV the next wind?**

- Module costs to continue to fall?
- Strong investment to continue?
- Problems that lie ahead?

Reinhold Buttgerit, Secretary General, European Photovoltaic Industry Association (EPIA)

17:45 **Understanding the roof-top PV revolution – Growth outlook and future potential**

- As grid parity draws nearer for solar electricity in multiple countries, the art of industry-building lies for governments in feed-in tariff management
- Technical and financial innovation is speeding the uptake of rooftop solar
- Reasons for the proliferating popularity of the technology, and how this will play going forward
- Additional market drivers around security, unrecognised still by many, are set to become increasingly important

Jeremy Leggett, Founder and Executive Chairman, Solarcentury, Founder and Chairman, SolarAid

18:05 *Networking reception*

## Day two: Friday 27 January 2012

08:00 *Registration and continental breakfast*

08:50 **Chairman's welcoming remarks and review of day one**

09:00 **Keynote address: The €300bn question - What is the acceptable risk reward proposition for offshore wind?**

- European targets for offshore wind project deployment
- An assessment of the financial resources that could be required
- An assessment of the risk reward proposition presented by offshore wind
- Key levers in making offshore wind an attractive investment proposition

Hans Bünting, Chief Financial Officer, RWE Innogy

09:25 **Keynote address: Global renewables development**

Eddie O'Connor, Founder and Chief Executive Officer, Mainstream Renewable Power

09:50 **Hedging techniques for wind generators**

- How does wind generator's value chain and risk landscape look like?
- Rationale for hedging out lack / excess of wind
- Reducing basis risk: Indices based on re-analysed data
- Hedging: Various instruments for various purposes

Thomas Kammann, Director, Corporate Solutions, Swiss Re

## Evaluating renewable energy market attractiveness in Europe: Policy, price and potential

10:15 **NWE: Strength in offshore wind set to continue?**

- Current state of government support
- Investment status of renewables infrastructure

David R. Jones, Editor, Renewable Energy Markets, Platts

10:40 **Wind competitiveness: The European case**

- Is wind the most cost competitive renewable technology today?
- Is wind a cost adequate technology to meet increasing demand?
- Is wind profitable at current electricity wholesale prices?
- Is wind tariff generating an over-cost in the electricity system?

Carmelo Scalone, Executive Director Business Initiatives, EDP Renováveis

11:15: *Networking and refreshment break*

11:45 **CEE renewables market outlook**

- Role of renewables in the region's long term energy strategy
- Current renewable incentives and their future
- Tackling the challenges and keeping the momentum

Teodor Bobochikov, Director, Business Development, AES European Wind Generation

## Outlook for investment: Attraction, appetite and sourcing

12:10 **Financing offshore wind**

- Recent transactions
- Key parameters
- Risks accepted by the banking market
- Prospects

Jerome Guillet, Managing Director, Green Giraffe Energy Bankers

12:35 **The impact of the ongoing financial crisis on the lending landscape for power project financing**

- The financial crisis and its effect on European renewable power projects
- Attracting commercial lenders
- Analysing financing options
- Contractual structures and potential pitfalls

Gareth Miller, Head of Renewable Energy Project Finance, Barclays Capital

## Regional grid expansion and infrastructure development – Will it catch up?

13:00 **European Supergrid – Status, milestones and targets**

Marcello Del Brenna, Chairman of the Board, Friends of the Supergrid, and Chief Executive Officer, Prysmian Powerlink

13:35 **Managing the grid volatility and renewable power integration – The role of the TSO**

Dr. Peter Hoffmann, Head of System Operations, TenneT

14:00 *End of conference*

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**6th Annual Central and Eastern European Power**  
30-31 January 2012  
Budapest, Hungary

**6th Annual European Carbon Capture and Storage**  
27-28 February 2012  
London, UK

**6th Annual European Gas Storage**  
19 – 20 March 2012  
Amsterdam, The Netherlands

**3rd Annual European Bunker Fuels Markets**  
26 – 27 March 2012  
Amsterdam, The Netherlands

**3rd Annual European Power Generation**  
26 – 27 April 2012  
Amsterdam, The Netherlands

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Registration fee:	Standard Rate
<b>Commercial</b>	\$1,999 + VAT @ 19%
<b>Credit card incentive</b>	\$1,899 + VAT @ 19%

The full conference registration is payable in advance, failure to do so will require you to guarantee your place by credit card. The delegate fee includes breakfast, luncheon, refreshments and post-conference documentation.

**Discounts:** Discounts or promotional offers cannot be combined.

**Team discount** — \$1,640 + VAT @ 19% per person. This price is applicable when you register three or more delegates simultaneously for the same organisation.

**Credit card discount:** — Save \$100 off the standard rate when paying in full at time of registrations with a credit card. (subject to verification)

**Venue:**

Kempinski Hotel Bristol, Kurfürstendamm 27, 10719 Berlin, Germany, Tel: +49 (0)30 8843 40

**Discount accommodations:**

A limited number of rooms have been reserved for Platts 3rd Annual European Renewable Energy Markets conference participants at the Kempinski Hotel Bristol at the preferential rates listed below. The discounted rates are for the nights of January 25-26, 2012 only. These rates will be honored until January 4th 2012 — subject to availability.

**Room Rates:**

**Single occupancy** €139

**Double occupancy** €159

All rates are inclusive of Vat and a full buffet breakfast

**Reservations**

To make your reservation please call the hotel directly on +49 (0)30 8843 40 or email [reservations.bristol@kempinski.com](mailto:reservations.bristol@kempinski.com) and be sure to mention Platts 3rd Annual European Renewable Energy Markets conference in order to receive the preferential rates. A reservation form is also available online.

**Substitution & cancellation:**

Your registration may be transferred to a member of your organization up to 24 hours in advance of the conference. **Cancellations** must be received in writing on or before **January 19, 2012** in order to be refunded, less a \$195 administrative charge. No refunds will be made after this date. **In case of conference cancellation, Platts liability is limited to refund of the conference registration fee only.** Platts reserves the right to alter this program without prior notice.

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