



by
energynomics

ON THIN ICE ON THIN ICE

Official Report of the 2020 Energy Strategy Summit

ACKNOWLEDGEMENTS

This Report was prepared and edited by the Energynomics editorial team, under the guidance of chief editor Gabriel Avăcăriței. Transcripts of the speeches delivered during the 2020 Energy Strategy Summit were used as basis, the debates occasioned by this event.

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FPPG - the Employers' Federation for Oil and Gas, ROPEPCA - the Romanian Petroleum Exploration and Production Companies Association, OCNI - the Organisation of Canadian Nuclear Industries, and RWEA - the Romanian Wind Energy Association were among the business associations which provided support in organizing the Summit.

Last but not least, special thanks go to all participating Ministries, State Secretaries, speakers, moderators, official delegates and participants to the 2020 Energy Strategy Summit for their valuable contributions and without whom this Report would simply not have existed.

Thank you for joining us on the 6th edition!
See you in 2021!





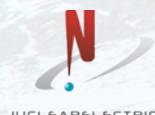
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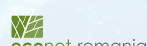


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ENERGY STRATEGY SUMMIT 2020 – ON THIN ICE

More than in Romanian, the English word for intention preserves more transparently its Latin birth (in-tensio) and the original meaning where in-tention includes a form of tension.

2020 is the year of great projects and plans of intention in Romanian energy. Against the background of major policy re-settlements at global and especially European level (mainly the shifting from energy security and accessibility to the sustainability of energy generation and consumption), the new political configuration in Bucharest, despite its fragility, has proposed in recent 8-9 months many projects in which the inherent tensions are obvious.

'Clean' coal

We need to advance quickly so that we use coal in a way that minimizes the impact on the environment. Without serious investment in converting coal-fired generation units into other, less polluting plants, the only solution is to close those that burn coal, in the shortest of time. Defining this short time is hampered not only by ideological differences ("environmental impact is not that great") or idiosyncratic differences ("not even them are in a hurry to close their coal-fired capacities"), but also by the administrative inability to design and implement a transitional plan (cumbersome legislation, limited expertise), as well as the lack of a clear perspective on financing sources. The money for just transition is promised, but they cannot be accessed yet, and European funds for modernization and/or innovation will only be available in a year or two. Until then, social problems discourage most of firm policy approaches.

Transition solution or not

Natural gas is the first among the alternative solutions, given its energy density, Romania's resources and the tradition of the industry. But there is no clear prospect for unblocking exploitation in the Black Sea – the main hope for exiting the pathway of "natural" annual reduction of domestic production. Stiff institutions continue to stall in attracting new players in the onshore upstream segment, with the launch of a new round of tenders for concessions delayed each semester. The European Green Deal threatens the prospects of recovering new investments in raw material production and converting hydrocarbons into electricity and heat.

Who pays for renewable energy

There is an agreement, in principle, that we need more renewable energy, but we are far from a general agreement on the amount of new investments needed and even further away in respect of assessing their impact on the stability of the national energy system. Granting new subsidies seems to be out of the question now, but we lack the financial instruments that have proved their effectiveness in other countries; the form of a system for contracts for the difference has not been found yet and the acceptance of long-term bilateral contracts by the authorities has not been accompanied yet by clarity in legislation and regulation. As a result, potential investors are delaying large-scale projects. A positive signal comes from industry and large commercial networks, where PV electricity generation solutions are increasingly adopted, as shorter timeframes for return on investment and benefits of increased independence from the grid are increasingly understood.

The Black Sea is once again a promise for the coming decades, with power generation from offshore wind sources. However, studies identifying areas where offshore turbine fleets could be deployed are still lacking, as well as financial instruments to encourage large-scale investment.

Modernization without enthusiasm

The improvement of performance indicators in the transport, distribution and consumption of electricity has maintained its pace in recent years, based on operators' investment programs and on the pressures to optimize economic performance in large industrial groups. The digitalization of processes, smart metering, upgrading of transformation stations and, less so, the replacing/ extending transmission and distribution networks are, however, held back by the obsession of securing "sustainable" levels of increases in final consumers' bills. Politicians imagine what household consumers want – prices that are as low as possible, possibly lower each year, but fail to adopt and put in place a system to define and effectively protect vulnerable consumers; at the same time, large industrial consumers manage to get derogations and support schemes each year, arguing that they are thus preserving local businesses and thousands of jobs.

Fragile agreement on objectives, disagreement on means

Investment plans are ambitious, but only in terms of intentions and strategies, because in reality they are based on fragile budgets. The new European budgets are a rescue and they could fuel faster development in all the areas mentioned.

However, there is still present a tension that has been felt for decades in society and, of course, in politics. Modernizing the economy is impossible without attracting foreign investment and engaging in regional projects. At the same time, a public majority, with a variable composition, wants to fully maintain national "sovereignty". Overcoming this tension is one of the major themes of the forthcoming period.

Finally, Romania seems to be back on track to implement free markets in both the gas and electricity sectors. However, the temptation of controlled prices remains, with adverse effects on investors' ability to forecast the timeframes for return on their investment.

But the most serious tension is the one that comes from politics. In the middle of the election period, the tension between the government (the National Liberal Party) and the Parliament (still dominated by the Social Democratic Party and its allies) is preventing any serious prognosis about when the updates and reforms now presented as intentions will become solid realities. What we know is that a decision on the amendment of the offshore law is postponed to 2021, pushing a potential investment decision in the more promising perimeter even further away in time. Key decisions on the institutional reorganization of the National Agency for Mineral Resources, as well as the adoption of new laws regarding electricity, thermal power and energy efficiency, are also postponed.

Therefore, we will have another half year of tension before the parliamentary elections; at the same time, we have the hope for long-awaited clarifications at political level, with four years of stability in the Parliament and Government.



REACHING THE EUROPEAN UNION'S TARGET FOR ZERO EMISSIONS IN 2050 CAN ONLY BE ACHIEVED THROUGH A COMBINED SET OF MEASURES IN THE AREAS OF ENERGY EFFICIENCY, NEW RENEWABLE PRODUCTION AND NEW TECHNOLOGIES WHICH WILL ALLOW US TO USE FOSSIL FUELS, AT LEAST FOR A TRANSITIONAL PERIOD.

CRISTIAN BĂDESCU, SPECIAL REPRESENTATIVE FOR ENERGY SECURITY IN THE ROMANIAN MINISTRY OF FOREIGN AFFAIRS



WE NEED INVESTMENTS, AND IN ORDER TO MAKE THEM, WE NEED A PREDICTABLE AND STABLE LEGISLATIVE AND REGULATORY FRAMEWORK.

CORINA POPESCU, CEO ELECTRICA SA



THE NEXT 10 YEARS WILL BE CRUCIAL IN TERMS OF ROMANIA'S CHANCES OF SUCCESS IN ITS ATTEMPT TO ALIGN WITH THE EUROPEAN STANDARDS AND TARGETS IN THE FIELDS OF ENERGY, CLIMATE AND STABILITY FOR 2050.

ZOLTAN NAGY-BEGE, VICE-PRESIDENT OF ANRE





THE ONLY SOLUTION FOR THE ENERGY SYSTEM IS TO HAVE A AS FREE AND AS DEREGULATED MARKET AS POSSIBLE.

BOGDAN BADEA, CHAIRMAN OF THE HIDROELECTRICA DIRECTORATE



TRANSPORT INFRASTRUCTURE IS VERY IMPORTANT AS A FACTOR IN CREATING A MODERN ECONOMY AND I CAN ANNOUNCE THAT THE BRUA PROJECT IS COMPLETED.

ELISABETA GHIDIU, DIRECTOR OF CORPORATE STRATEGY AND MANAGEMENT DEPARTMENT, TRANSGAZ



AMONG ROMGAZ' STRATEGIC DIRECTIONS THERE ARE GROWTH AND DIVERSIFICATION, BUT ALSO MAINTAINING THE CURRENT PORTFOLIO – BY REDUCING PRODUCTION DECLINE AND BY REHABILITATING EXISTING FACILITIES. OVER THE NEXT FIVE YEARS, INVESTMENTS WILL AMOUNT TO OVER 15 BILLION LEI, ALLOCATED FOR NATURAL GAS PRODUCTION, ELECTRICITY PRODUCTION AND PETROCHEMICALS PRODUCTION.

ROBERT CHIRCĂ, DEPUTY CEO ROMGAZ





OUR ENERGY SYSTEM NEEDS INTEGRATED INVESTMENTS IN GAS-BASED COGENERATION SOLUTIONS AND RENEWABLE ENERGY PRODUCTION UNITS. A SUPPLIER THAT DOES NOT HAVE A VERTICAL INTEGRATION CAN NO LONGER SURVIVE IN THE MARKET.

PETRE STROE, COUNTRY MANAGER, MET ROMÂNIA ENERGY



INVESTMENT AND DEVELOPMENT ARE A REAL MECHANISM FOR RELAUNCHING THE ROMANIAN ECONOMY

ROBERT CHIRCĂ, DEPUTY CEO ROMGAZ



IF YOU WANT TO ATTRACT NEW INVESTMENTS, AS A COUNTRY, YOU NEED TO PROVIDE PREDICTABLE LEGISLATION – WHICH UNFORTUNATELY WE HAVE NOT HAD –, AN EXTREMELY FLEXIBLE AND EFFICIENT AUTHORIZATION SYSTEM – AND HERE WE NEED MORE PRAGMATISM, SO THAT INVESTORS, WHEN THEY LOOK AT THE MAP AND CHOOSE ROMANIA, THEY SHOULD DO IT BECAUSE HERE THEY THINK THEY WILL GET BACK THEIR INVESTMENT VERY QUICKLY.

BOGDAN BADEA, CHAIRMAN OF THE HIDROELECTRICA DIRECTORATE





THERE IS A LOT TO DO, AND WE NEED TO HAVE A CONCRETE PLAN TO MAKE THESE INVESTMENTS, ESPECIALLY IN RENEWABLE ENERGIES. THE FLEXIBILITY OF THE ENERGY SYSTEM IS VERY IMPORTANT AND WE NEED INVESTMENTS IN THE NETWORK. STORAGE IS ALSO VERY IMPORTANT, AS HYDROGEN IS, EVEN THOUGH IT IS MORE DIFFICULT TO SUPPORT IT FROM AN ECONOMICAL POINT OF VIEW.

CARLO PIGNOLONI, PRESIDENT OF THE ROMANIAN ASSOCIATION FOR WIND POWER – RWEA



NATURAL GAS WILL BE OF PARTICULAR IMPORTANCE IN THE NEXT 10-20 YEARS FOR CENTRAL AND EASTERN EUROPE AND ESPECIALLY FOR ROMANIA, WHICH HAS HUGE POTENTIAL IN THIS FIELD.

ZOLTAN NAGY-BEGE, VICE-PRESIDENT OF ANRE



NUCLEAR ENERGY IS A STRATEGIC COMPONENT WITHOUT WHICH THE ACHIEVEMENT OF THE EUROPEAN ENVIRONMENTAL TARGETS THAT HAVE BEEN SET UP CANNOT TAKE PLACE.

TEODOR CHIRICA, MEMBER OF THE BOARD, NUCLEARELECTRICA





WE ARE EXTREMELY INTERESTED IN IDENTIFYING SOME PARTNERS TO HELP US INCREASE THE VALUE OF THE NATURAL GAS RESERVES WE HAVE IN ROMANIA.

ADRIAN DUMITRIU, CFO CHIMCOMPLEX



WE NEED LIBERALIZATION, FREE MARKETS, WE NEED DIGITALIZATION, LESS BUREAUCRACY AND WORKING WITH THE GOVERNMENT IN ORDER TO RESTART THE ECONOMY.

STEPHEN BIRRELL, PRESIDENT OF ROPEPCA



ROMATOM RECOMMENDS THE DEVELOPMENT OF AN INDUSTRIAL STRATEGY IN ORDER TO IDENTIFY THE EXTENT TO WHICH THE STATE CAN SECURE THE PARTICIPATION AND CONSOLIDATION OF THE ROLE OF THE ROMANIAN DISTRIBUTION NETWORK IN COMPLETING SOME ENERGY PROJECTS, BUT ALSO PROVIDE SUPPORT FOR THE R&D SECTOR IN PARTNERSHIP WITH THE NUCLEAR FIELD IN ORDER TO DEVELOP ADVANCED TECHNOLOGIES IN THE NUCLEAR FIELD.

LUCIAN RUSU, CHAIRMAN OF ROMATOM





WE WILL CONTINUE TO WORK TOGETHER TO KEEP THE ROMANIAN-CANADIAN SUPPLY CHAIN INTACT.

RON OBERTH, PRESIDENT AND CEO OF THE ORGANISATION OF CANADIAN NUCLEAR INDUSTRIES



HPE IS TRYING TO OPTIMIZE, ORCHESTRATE, AND OPERATIONALIZE ARTIFICIAL INTELLIGENCE. IN THE ENERGY SECTOR, WE LOOK AT THE UPSTREAM SEGMENT, TOO - HOW TO EXTRACT OIL, HOW TO EXPLORE, HOW TO KEEP THE WELL IN PRODUCTION, ITS ANALYSIS AND SECURITY. IN THE DOWNSTREAM SEGMENT, WE LOOK AT PREDICTIVE MAINTENANCE, DEMAND MANAGEMENT, ENERGY THEFT, ENERGY TRADING, PIPELINE MAINTENANCE.

SORIN CHERAN, FELLOW, VP, ARTIFICIAL INTELLIGENCE STRATEGY AND SOLUTION GROUP, HEWLETT PACKARD ENTERPRISE



DIGITALISATION IS THE RESPONSE TO MANY CHALLENGES OF THE OIL AND GAS INDUSTRY.

OANA BUCUR, REPRESENTATIVE OF THE EMPLOYERS' FEDERATION FOR OIL AND GAS – FPPG



PARADIGM HAS CHANGED SIGNIFICANTLY IN THE ENERGY SECTOR: MANAGERS WANT PREDICTIVE INFORMATION AND LOW RISK FOR THEIR COMPANIES, TO IMPROVE OPERATIONS AND TO ALLOW ACCESS TO NEW INNOVATIONS.

**THORSTEN KOCH, CUSTOMER ENGINEER MANAGER –
GOOGLE CLOUD EMEA/CEE**



ON THE ROMANIAN MARKET THERE IS A NEED TO INCREASE DIGITAL SKILLS FOR THE PERSONNEL.

**VICENȚIU CORBU, MANAGING DIRECTOR KEEP IT
MOBILE DEVELOPMENT**



DECARBONIZATION CHANGES THE GENERATION STRUCTURE, EVEN DRAMATICALLY, FOR MANY COMPANIES IN THE CEE REGION. NEW SMALLER PROJECTS WILL BE CONNECTED TO THE NETWORKS, GENERATING ENERGY AT RANDOM AND ALL PLAYERS ALONG THE INTEGRATED VALUE CHAIN OF UTILITIES MUST TAKE ADAPTATION MEASURES. NOW, MORE THAN EVER, WE NEED TO USE ALL THE DATA WE HAVE TO EXTRACT VALUABLE INFORMATION SO THAT WE CAN MANAGE COMPANIES IN THIS NEW BUSINESS ENVIRONMENT OF THE CIRCULAR ECONOMY.

**MICHAL OSLADIL, ENERGY & UTILITIES
LEADER, IBM CEE**



THE NATIONAL ENERGY STRATEGY MUST BE DESIGNED IN A REGIONAL AND EUROPEAN CONTEXT, WHICH IS WHY INTEGRATED PLANS HAVE BEEN DISCUSSED AT REGIONAL LEVEL WITH NEIGHBORING COUNTRIES; IT HAS BEEN AN EXCHANGE OF INFORMATION BETWEEN EUROPEAN STATES, AND PARTICULARLY BETWEEN NEIGHBORING COUNTRIES.



ELENA POPESCU, DIRECTOR OF THE DIRECTORATE FOR ENERGY, TRANSITION AND RENEWABLE POLICIES, MEEMA



ONE OF OUR TARGETS IS TO HAVE STRONG, EFFICIENT AND INTERCONNECTED NETWORKS, AS A PRECONDITION FOR A STABLE ENERGY SYSTEM IN EUROPE, AND THE INTEGRATION OF LOW-CARBON ENERGIES.

GEORGE VIȘAN, ENERGY MARKETS DIVISION DIRECTOR, TRANSELECTRICA



WE HAVE SEEN AN INCREASED INTEREST IN THE RENEWABLE AREA, WHICH ALSO COMES FROM THE TAKEOVER OF OPERATIONAL PROJECTS THROUGH M&A IN ADDITION, IF THE LEGISLATIVE CONTEXT ALLOWS IT, THE MARKET ALSO EXPECTS NEW PROJECTS, FOR WHICH PREDICTABILITY IS NEEDED. BCR CONTINUES TO BE A MAIN PARTNER FOR THE ENERGY SECTOR.

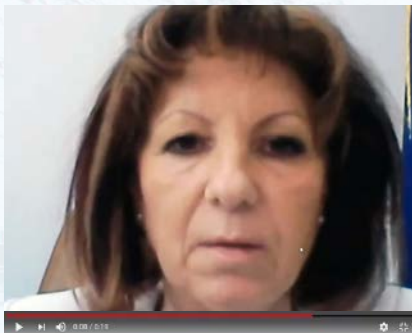
RAMONA KURKO, HEAD OF ENERGY & UTILITIES, CORPORATE BANKING BCR





AHK MEMBERS IN THE ENERGY SECTOR ARE VERY ATTENTIVE TO NEW EUROPEAN FUNDING, SUCH AS THE MODERNIZATION FUND OR THE JUST TRANSITION MECHANISM, TO THE EVOLUTION OF THE MULTI-ANNUAL DEVELOPMENT FRAMEWORK, NOW UNDER DISCUSSION, AND THE GREEN DEAL WILL PLAY A CRUCIAL ROLE IN THESE NEGOTIATIONS. WE WILL SUPPORT THE GREEN TRANSITION IN EUROPE AND IN ROMANIA.

SEBASTIAN METZ, GENERAL MANAGER & BOARD MEMBER, GERMAN-ROMANIAN CHAMBER OF COMMERCE (AHK ROMANIA)



THE ENERGY STRATEGY WILL PROVIDE A SAFE ECOSYSTEM OF SUPPLIERS OF EQUIPMENT AND TECHNOLOGIES IN ROMANIA.

PETRU RUȘEȚ, CEO SIEMENS ENERGY ROMÂNIA



THE CONTRACT MECHANISM FOR DIFFERENCE WILL BE APPLIED FROM 2022 AND IT WILL TARGET A WIDER RANGE OF RESOURCES, NOT JUST NUCLEAR ENERGY.

ELENA POPESCU, DIRECTOR OF THE DIRECTORATE FOR ENERGY, TRANSITION AND RENEWABLE POLICIES, MEEMA





TRANSGAZ IS CONSIDERING STUDIES ON THE ACCEPTANCE OF A 2% HYDROGEN MIX IN THE TRANSPORT SYSTEM.

ELISABETA GHIDIU, DIRECTOR OF CORPORATE STRATEGY AND MANAGEMENT DEPARTMENT, TRANSGAZ



THE BUSINESS ENVIRONMENT IS CHANGING FASTER AND FASTER AND CLIMATE CHANGE IS AT THE HEART OF THE NEW PLANS.

MASAHIRO OGATA, MANAGING DIRECTOR KAWASAKI GAS TURBINE EUROPE



ROMANIA IS AT A STRATEGIC INTERCONNECTION POINT BEING ON THE BLACK SEA COAST AND BEING ABLE TO TRANSIT ENERGY ULTIMATELY FROM THE MEDITERRANEAN FROM THE CASPIAN, AS WELL AS LNG COULD COME INTO ROMANIA THROUGH GREECE AND BULGARIA AND THEN ON TO THE REST OF CENTRAL AND EASTERN EUROPE.

HE RICHARD L. MORNINGSTAR, FORMER US AMBASSADOR TO THE EUROPEAN UNION, FOUNDING CHAIRMAN ATLANTIC COUNCIL





Energynomics is the only full-service media agency that offers specialized consultancy services to energy companies operating both in Romania and in the neighbouring countries. Since 2013, Energynomics is the publisher of the only multi-channel communication platform dedicated to the local and regional energy industry. Having been involved for a long term and in various capacities with the energy sector in Romania, the founders of Energynomics decided to come and meet the needs of the energy sector private and public players, as well as NGOs. Energynomics offers tailor-made elite business media products and services, with a unique added value due to our industry focus and expertise.



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AGENDA

Ministerial Address: **Cristian Bădescu**, Special Representative for Energy Security in the Romanian Ministry of Foreign Affairs

KEYNOTE SPEAKER – **Zoltan Nagy-Bege**, Vice-President of ANRE

1st PANEL – **Strategies for transition – Green and Healthy Business!**

Corina Popescu, CEO Electrica

Bogdan Badea, Chairman of Directorate, Hidroelectrica

Carlo Pignoloni, President of RWEA

Petre Stroe, CEO MET România Energy

KEYNOTE SPEAKER – **Christina Verchere**, CEO OMV Petrom

2nd PANEL – **Strategy for investment – Financing New Projects!**

Robert Chircă, Deputy CEO Romgaz

Elisabeta Ghidiu, Director of Corporate Strategy and Management Department Transgaz

Teodor Chirica, member of the Board, Nuclearelectrica

Stephen Birrell, President of ROPEPCA

Ramona Kurko, Head of Energy & Utilities, Corporate Banking, BCR

Adrian Dumitriu, CFO Chimcomplex

Daniel Apostol, External Affairs Director, FPPG - moderator

SPECIAL NUCLEAR PANEL organized in partnership with the Embassy of Canada to Romania – Together for the future of nuclear energy!

Ron Oberth, President and CEO of the Organisation of Canadian Nuclear Industries

Lucian Rusu, President of ROMATOM

Teodor Chirica, member of the Board, Nuclearelectrica

KEYNOTE SPEAKER – **Niculae Havrileț**, State Secretary in the Ministry of Economy, Energy and Business Environment

3rd PANEL – **Strategy for Technology – Digitalization & Automation!**

Dr. Sorin Cheran, Fellow, VP, Artificial Intelligence Strategy and Solution Group, Hewlett Packard Enterprise

Thorsten Koch, Manager Sales Engineer – Google Cloud EMEA/CEE

Oana Bucur, Representative of the Employers' Federation for Oil and Gas – FPPG

Michal Osladil, Energy & Utilities Leader for IBM CEE

Vicențiu Corbu, Managing Director Keep IT Mobile

4th PANEL – **Strategy for Cooperation – Regional Approach!**

Elena Popescu, Director of the Directorate for Energy, Transition and Renewable Policies, MEEMA

Masahiro Ogata, Managing Director Kawasaki Gas Turbine Europe GmbH

Sebastian Metz, General Manager & Board Member, German-Romanian Chamber of Commerce (AHK Romania)

Petru Rușeț, CEO Siemens Energy România

Georghe Vișan, Energy Markets Division Director, Transelectrica

Radu Dudău, Co-founder and Director EPG – moderator

Final Remarks

Niculae Havrileț, State Secretary in the Ministry of Economy, Energy and Business Environment

HE Richard L. Morningstar, former US Ambassador to the European Union, Founding Chairman Atlantic Council

Valeriu Binig, Director of the Regulatory and Antitrust Affairs Department, Enel România – moderator



6 EDITIONS OF ENERGY STRATEGY SUMMIT





2019



2017



2015



2016



2019



2015



2019