

Engage

Your Quarterly Update

Winter Issue 2009

MD's message

Welcome to the winter edition of 'Engage', your quarterly newsletter from EnergyQuote incorporating John Hall Associates Limited (JHAL).



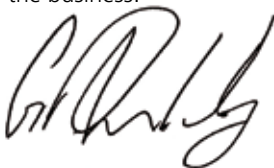
2009 has been a landmark year for us with the acquisition of JHAL which has enhanced the capabilities and strengths of the business. We continue to strive to improve the overall quality and breadth of service to all our customers.

The process of integrating two such established companies is no small task but the strides we have taken in the last couple of months have exceeded all our expectations. A thorough consultation process has taken place, with all members of staff being placed into suitable and challenging roles within the new organisation. This provides us with the strongest possible platform from which to build upon and we are now in the process of expanding our team across Europe.

Looking ahead to 2010, major projects include a complete company re-brand and a new and improved website, reflecting our enhanced service offering. This will demonstrate the combined cultures and core values that have contributed to the success of both companies, presenting a

strong and defined corporate image that will help strengthen our position within the market place. It promises to be an exciting time and, once again, we highly value your support as we accelerate towards our goal of becoming Europe's leading energy consultancy.

On behalf of all our team, I wish you a very happy and prosperous New Year and look forward to strengthening our partnership through the enhanced service capability of the business.



Gary Worby, Managing Director
EnergyQuote incorporating John Hall Associates Limited

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Feedback/Suggestions

Please email us your feedback on our quarterly issues at marketingcomms@energyquote.com

Our next issue

Our spring newsletter will be published on 31st March 2010

INDUSTRY NEWS



New decade;
new politics

One of the first actions of EU energy commissioner Andris Piebalgs following his appointment in November 2004 was to question the conundrum that is European energy competition. Mr Piebalgs stated his choice was to either make existing legislation work or write new legislation. He chose the former, and did the latter, but as his five-year term in office ended last month Europe's energy market had started to become less, not more, competitive with worrying signs that protectionism is slowly returning.

In hindsight, Piebalgs should have taken the third option; do nothing. Competition has become anathema to Europe's energy sector and the five-yearly pro-competition mantras from the newly appointed energy commissioners have become largely irrelevant. Europe is seemingly structurally incapable of becoming more competitive, and the European Commission has neither the muscle, policy and nor, it seems, the enthusiasm, to restructure European energy as a dynamic competitive market.

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Last month, European Commission president Jose Manuel Barroso announced his new team of commissioners for the next five years. Perhaps not surprisingly, Piebalgs has vacated the energy portfolio with Germany's Guenther Oettinger appointed by Barroso, who believes a more powerful energy commissioner is required to negotiate with Europe's energy partners, notably Russia, to prevent any new gas crises. However, there is probably a secondary reason why the energy portfolio has gone to Germany; last year the German government, in conjunction with France, torpedoed Barroso's ownership unbundling proposal that was central to Piebalgs' third energy package. It seems that Barroso has realised it is better for him to work with, not against, Germany on energy policy, although a German-led energy policy is unlikely to resonate with free market pro-competition member states such as the UK and most of the EU-12 accession member states.

Potentially increasing the political power of the Franco-German alliance over Europe's energy market will be the appointment of France's Michel Barnier as Single Market Commissioner. Welcoming his appointment, French president Nicolas Sarkozy suggested it heralds the victory

of the European model, which Sarkozy sees as a more federal EU. Given France's opposition to reciprocal competition and its support of protectionist policies of those sectors, including energy, it considers to be in the 'national interest,' it is conceivable that the French view of a single market will lead to new proposals for a single EU energy regulator with member states losing more control of their energy assets to faceless Brussels' Eurocrats.

Barroso has also created a Climate Change Commissioner to oversee implementation of the EU's CO2 emission targets and to negotiate a binding global climate treaty to succeed the Kyoto Protocol. The appointment has gone to Denmark's Connie Hedegaard, who has been closely involved with the preparations for this month's UN climate summit in Copenhagen. It will be interesting to see how the appointment of a climate change commissioner impacts energy policy, which has been strongly climate-led in recent years. Europe needs to refocus on supply security and it would have been in the best interests of EU energy and climate policy to combine the two portfolios in order to reduce commissioner conflicts and develop policy that advances a balanced security and sustainability approach.

Arguably the most important development in EU politics has been the Lisbon Treaty coming into force this month with the election of closet federalist Herman van Rompuy as the EU's first president, who was the choice of France and Germany. A nondescript Belgian politician likened by some in the British media to a political pygmy, van Rompuy may be the face of the EU but the concern is he will be a political puppet of Paris and Berlin. This could have a particular impact in the energy and climate sectors, as under the Lisbon Treaty both these sectors have had national vetoes removed from policymaking.

Taken collectively, these appointments suggest the Franco-German alliance will have an even stronger influence over energy policy in the coming five years and could conceivably create more divisions, particularly on the issue of competition. In November 2004, Piebalgs talked enthusiastically about his vision of a single competitive EU energy market. Five years on, a more federal looking EU remains on the path to a single energy market, but without the panacea of full and reciprocal competition.

