

YES- EUROPE BELGIUM PRESENTS

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BELGIAN NEXT GEN
FUTURE OF ENERGY
REPORT



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Executive summary

YES-Europe Belgium provides an analysis and evaluation of the current opinion of the next generation on the future of energy in Belgium. Our objective for this research is to inquire about and analyse the future of energy in Belgium. Our research looks at two distinct categories: young professionals, whom we polled through a survey, and energy start-ups.

YES-Europe Belgium is a national section of YES-Europe, representing Belgian “Young Leaders in Energy and Sustainability” (YES). We are a European community dedicated to empowering students and young professionals. Our goal is to catalyze the energy transition by providing a forum for youth to cultivate ideas, take on responsibility, create their local community, and take action for change. YES-Europe Belgium strives to become a knowledge-sharing center for sustainability-related topics for Belgium within the YES-Europe network.

Next Gen survey

We gathered data from Belgian students and young professionals through a survey of about 15 questions, in line with our organization's core goals and vision. Our data analysis demonstrates that young professionals believe that government efforts are insufficiently committed to (green) energy. In particular, the federal government is held responsible for the future of Belgian energy. These young professionals believe in a national approach, rather than limiting ourselves to regional boundaries and resources.

The report finds the prospects of the current energy situation in Belgium to be negative. The major areas of weakness require further investigation and remedial action by the (federal) government. The survey shows interesting results such as:

- The lack of energy advancement is blamed on a lack of political will and a complex political environment;
- Nuclear energy was the second most popular alternative among young people when it came to the future of energy sources, and many people believe it is an important part of our energy sector. It is also seen as a long-term option by a small majority;
- Regarding the pandemic, we questioned whether COVID-19 would mark a turning point. The majority of respondents agreed, although more than half of those said we had already skipped the window of opportunity. The remaining respondents believe there will be no energy turning point as a result of COVID-19.

Interviews with professionals

We also conducted interviews with six young energy experts in order to compile a more detailed study of the current condition of the energy industry in Belgium. The interviewees requested to remain anonymous, the opinions expressed are those of a single individual and do not represent the views of any company.

The most pressing issues for Belgium's future, according to the interviews:

- Because of the complexities of the argument, the nuclear phase-out is a vast issue;
- Another barrier to more sustainable energy, as indicated in the survey as well, is the dispersion of legislation and regulators;
- The importance of incentives and energy communities.



AFFORDABLE AND CLEAN ENERGY

The focus of this report is SDG 7. But what does this include exactly?

- By 2030, ensure universal access to affordable, reliable and modern energy services
 - By 2030, increase substantially the share of renewable energy in the global energy mix
 - By 2030, double the global rate of improvement in energy efficiency
 - By 2030, enhance international cooperation to facilitate access to clean energy research and technology, including renewable energy, energy efficiency and advanced and cleaner fossil-fuel technology, and promote investment in energy infrastructure and clean energy technology
 - By 2030, expand infrastructure and upgrade technology for supplying modern and sustainable energy services for all in developing countries, in particular least developed countries, small island developing States and landlocked developing countries, in accordance with their respective programmes of support
-

Mapping the Belgian energy sector

Prior to our data analysis, we want to provide a concise summary of some important aspects of the Belgian energy sector. Firstly, we will outline some general facts and figures about energy production and provision. To continue, we will elaborate on the existing policy framework in a fragmented country. Finally, we will provide an overview of important debates and current issues.

Energy production and provision: facts and figures

Belgium has made significant efforts to reform its energy sector in line with the EU's ambition to create one big energy market in which prices are fairly low, competition is abundant and service delivery is optimized (FOD Economie, 2019). In 2007, for instance, the Belgian energy market was liberalized to stimulate competition and dismantle existing monopolies. This liberalization process benefited consumers because they now have a choice as to which energy distributor they prefer, as well as a diversity of different prices and service delivery options. The new configuration of actors consists of ...

- Energy producers: sell to suppliers and industrial consumers.
 - Examples: Engie Electrabel, EDF Luminus, Eneco, ...
- Transmission system operators (TSO): responsible for the maintenance of high voltage power lines & directly supply to industrial customers and the regional distribution network operators.
 - Elia (electricity) and Fluxys (natural gas)
- Distribution network operators (DSO): responsible for electricity transformation from high to low voltage & directly supply families and individual consumers by means of power line networks.
 - Flanders: Fluvius
 - Brussels: Sibelga
 - Wallonia: AIEG, AIESH, ORES and Nethys



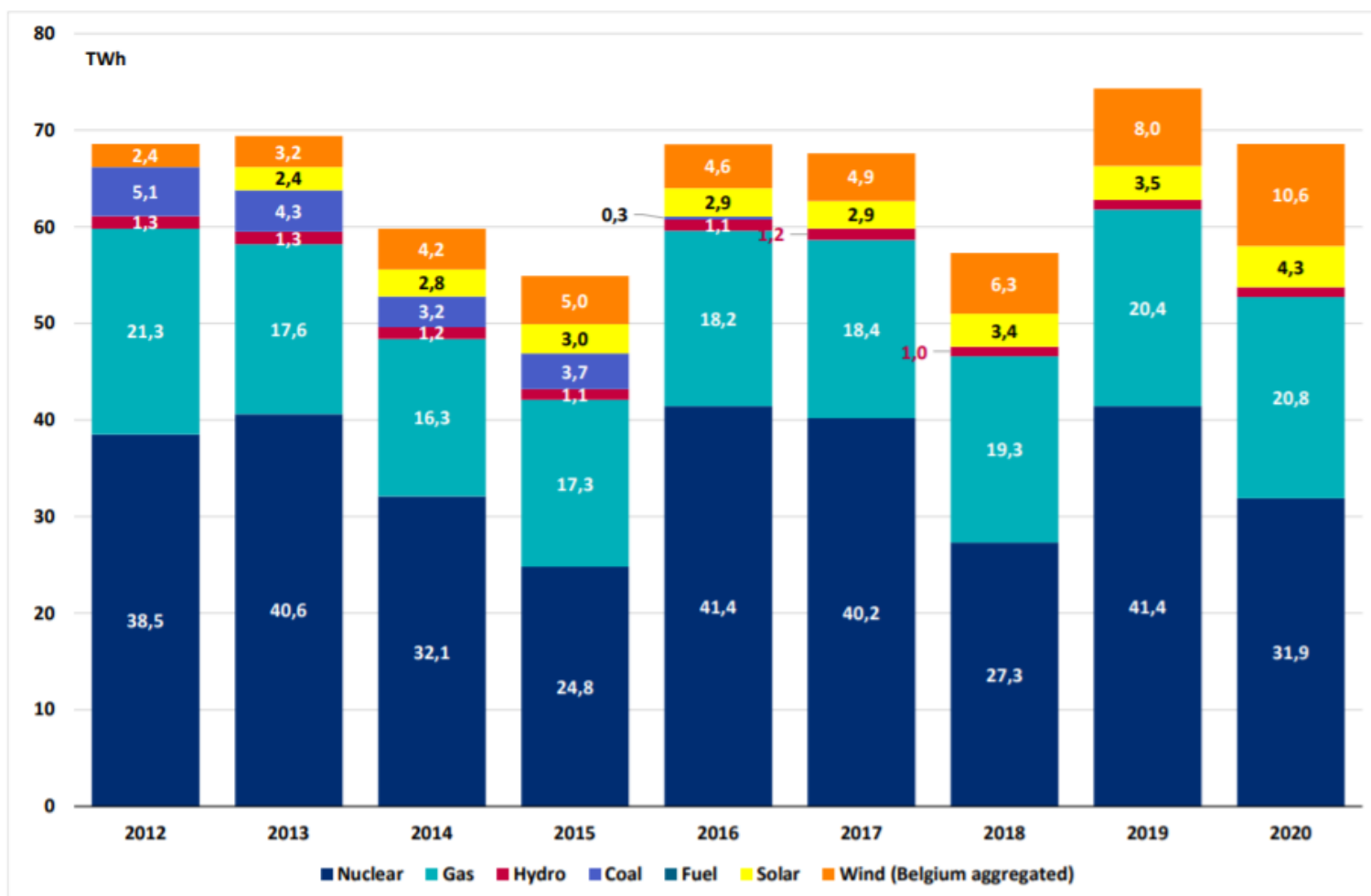
Sibelga
energizing the city



ORES
OPÉRATEUR DES RÉSEAUX GAZ & ÉLECTRICITÉ



Each region also has its own regulating unit (respectively: VREG, BRUGEL and CWaPE) within the government, tasked with the oversight of the regional electricity and gas market. These regional bodies are, in turn, overseen by the federal Commission for Electricity and Gas Regulation (CREG). According to CREG's data on the 2020 energy mix, nuclear power accounts for roughly 32% of our power supply. Another 21% comes from gas, with renewables (solar, wind, hydro) representing around 15% combined.



Source: CREG (2021) "Nota over de opvallende evoluties op de Belgische groothandelsmarkten voor elektriciteit en aardgas in 2020"

In 2020, nuclear power accounted for roughly 32% of our power supply. Another 21% came from gas, with renewables (solar, wind, hydro) representing around 15% combined. This graph also shows that, despite the mandatory nuclear exit by 2025, nuclear remains the dominant source of energy.

Policy framework in a fragmented country

As with many Belgian policy areas, there is no unified Belgian energy policy. Due to the federalisation process of the past decades, responsibility for energy has been scattered across the regional and national levels. This evolution dates back to the 2nd state reform in 1980 when the 3 regions (i.e. “gewesten”, “régions”) were created: Flanders, Wallonia and Brussels. Up until this day, however, the federal level functions as a facilitator, responsible for ensuring equal treatment between the regions. This mainly refers to those areas that are difficult to regionalise either technically or economically. In short, the federal government maintains the regional balance, by ...



- Ensuring the supply
- Researching future electricity or gas possibilities
- Regulating the nuclear fuel cycle
- Maintaining the major infrastructure in regards to production, storage & transport
- Setting energy tariffs

In turn, the regions take care of ...



- Electricity distribution
- Electricity transport
- The public distribution of gas
- The distribution networks of remote-produced warmth
- New energy sources, excluding those linked to nuclear energy
- The recovery of energy by the industry or other users
- Rational / sensible energy usage



To make sure everything runs smoothly, there is a multilateral consultation group that allows the federal to meet the regional level (“ENOVER” in Dutch or “CONCERE” in French).

Next Generation survey

Get to know our respondents

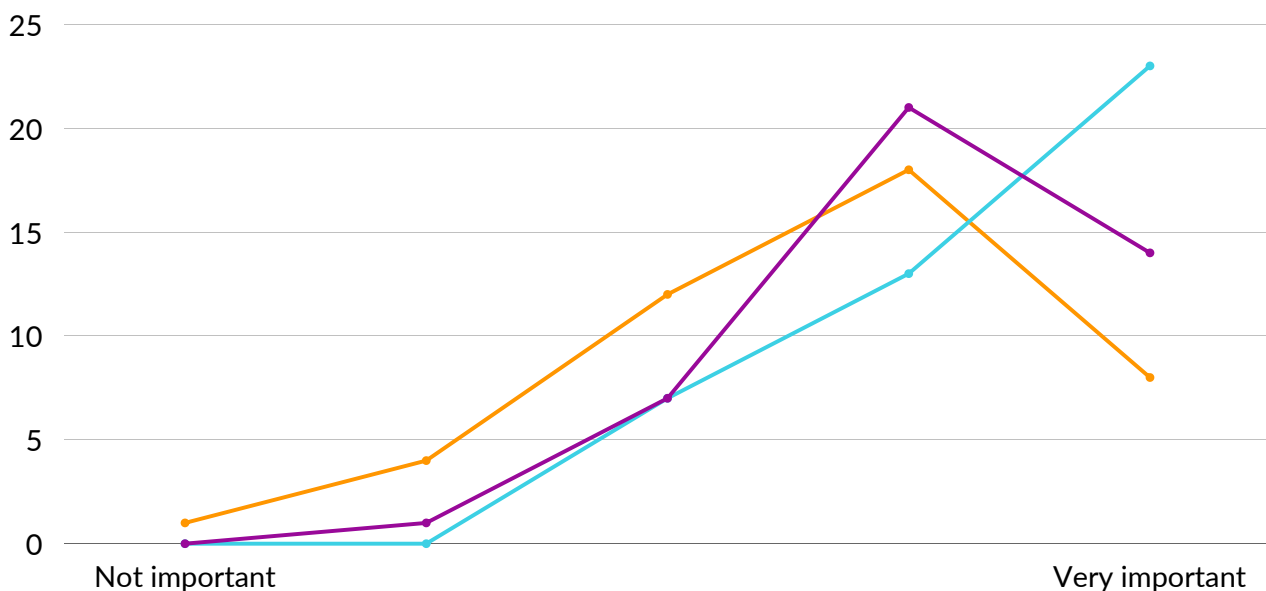
In line with our organisation's core objectives and vision, we gathered data from Belgian students and young professionals by means of a survey of about 15 questions. We managed to reach 43 respondents between January and March 2021. They consist of 30 students, 12 young professionals, and 1 teacher. Geographically, our respondents are fairly representative: 5 from Brussels, 14 from Wallonia, 18 from Flanders, and 6 foreign nationals that study or work here. Age-wise, 81% are below the age of 27, meaning that we have achieved our goal of representing young people. The majority has an engineering background (37), yet we also found some in economics (2), policy (2), urbanism and spatial planning (1), and energy management (1). Finally, the gender balance seems to confirm the stereotypical image of any STEM-related sector, with roughly 3/4ths of respondents identifying as male.

Theoretical framework: the Energy Trilemma

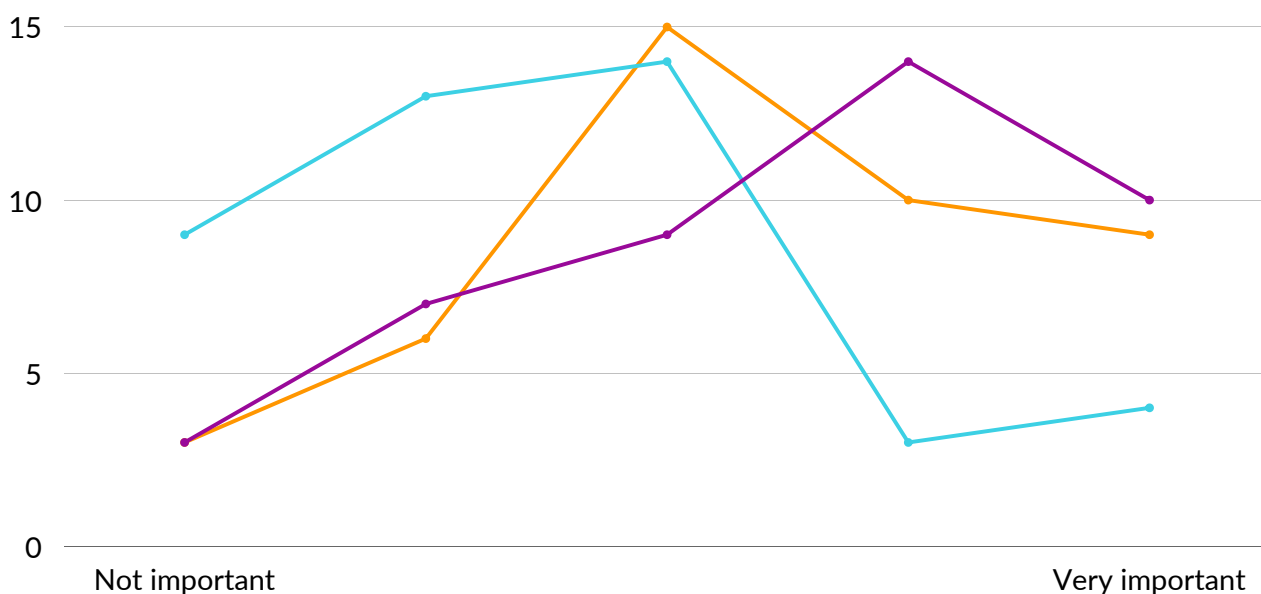
We started our questionnaire with the energy trilemma. This is an internationally used framework, brought to life by a triangular shape to illustrate the contradictory demands within the energy sector. For energy leaders, it is a literal dilemma to balance each of the three aspects: affordability, sustainability, and security.

- The first category, **affordability**, deals with issues of energy equity. This means that universal access to the energy grid must be ensured, while everyone should be able to make use of the energy grid at a reasonable price. The price gap between traditional fossil energy sources (such as diesel) and their often more expensive, yet clean, counterparts, is also important to take into account.
- Secondly, there is **sustainability**, which demands that energy is generated and supplied without harmful consequences for the environment. This aspect insists on the decarbonisation of the energy sector, as well as efficiency throughout the entire process of energy production, distribution and consumption.
- The third and final consideration is **energy security**, which ensures a stable and sufficient supply of energy at all times. The energy sector needs enough capacity to meet the demand at all times through efficient management as well as strong infrastructure. The overall security level is benefited by a decreased dependence on imports, diversified energy production, and resilient storage infrastructure.

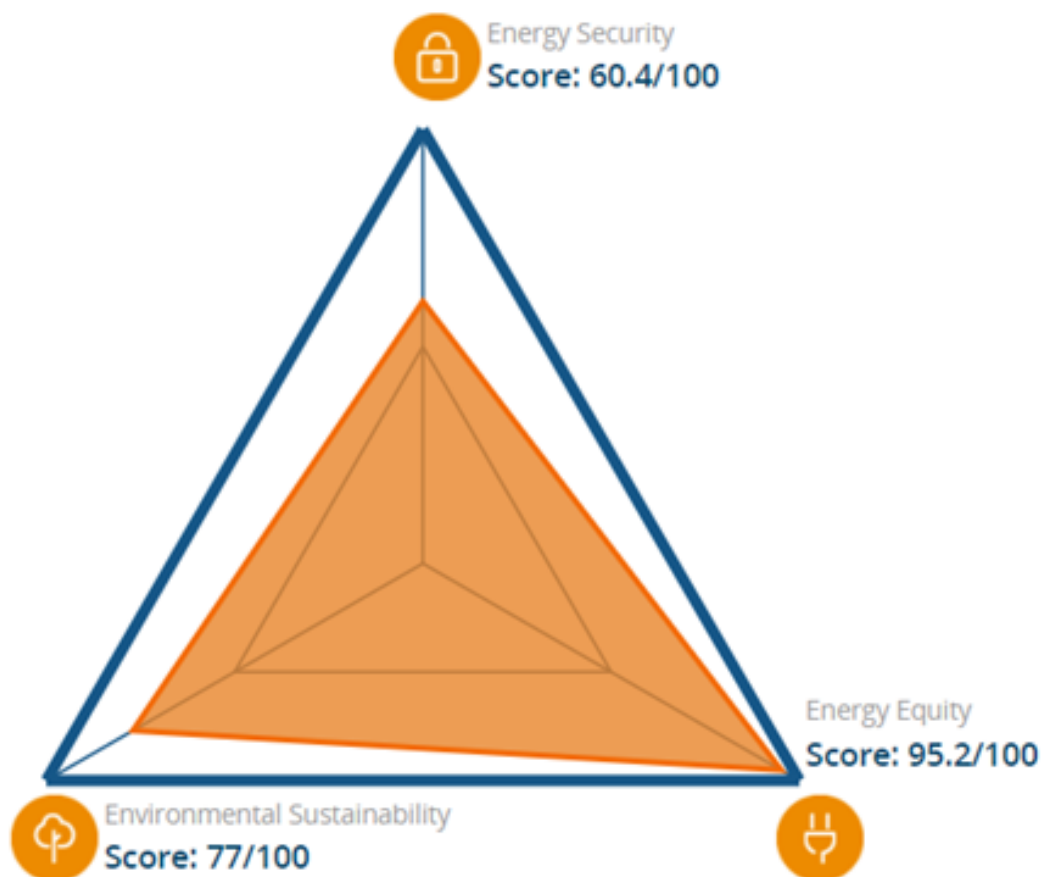
When we asked our young professional respondents to rank the importance of each aspect, we found that **sustainability** was definitely the main consideration. Sustainability was closely followed by **security of supply** and **affordability**.



Furthermore, we wanted to know their opinion on the Belgian government’s point of view on the trilemma. The response showed an interesting contrast: our government is expected to significantly favor the **security of supply** and **affordability** over **sustainability**. In the opinion of these youngsters, the government seems to care less about sustainability; something that might change once the former generation takes over. Perhaps they believe that the urgency of the energy transition is not yet fully understood by policymakers.



The World Energy Council annually makes country profiles according to this framework. In 2020, Belgium ranked 20th out of 108 countries, with a remarkably high score for energy equity. Energy security, on the other hand, was our weakest link. This was due to the fact that the nuclear phase-out is supposed to happen by 2025, yet for now, we are still ill-prepared to deal with potential supply shortages in the future. When comparing the answers of our respondents to the report's findings, it appears that young professionals may overestimate the government's dedication to energy security.

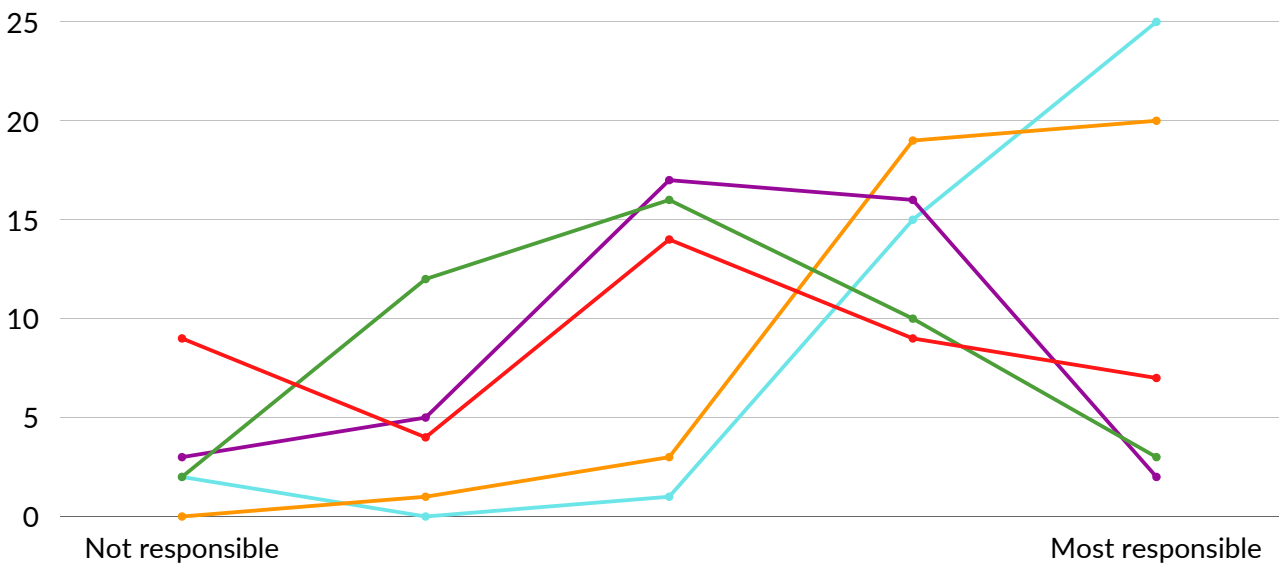


Source: World Energy Council (2020) "World Energy Trilemma Index 2020"

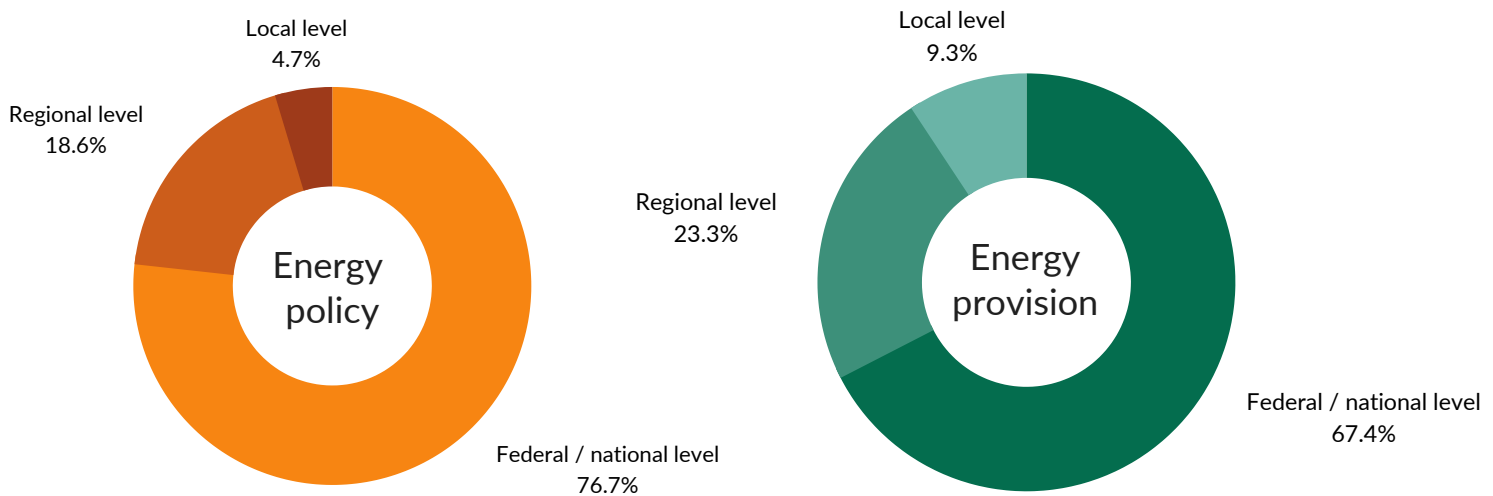
The World Energy Council ranked Belgium 20th out of 108 countries in its most recent Energy Trilemma Index. While we had a remarkably high score for equity, security appears to be our weakest link. When comparing the answers of our respondents to the report's findings, it appears that young professionals may overestimate the government's dedication to energy security.

Responsibility

Our next section focuses on responsibility. We asked our respondents to rank a variety of actors (government, large companies, SMEs, start-ups/scale-ups, and individuals) according to the importance of their role in the decarbonization process. It was clear that the **government** should be the driving actor in the process of realizing carbon neutrality, followed by **large companies**. **SMEs** also play a role, to a lesser extent. **Start-ups and scale-ups**, as well as **individuals**, are not immediate priorities.

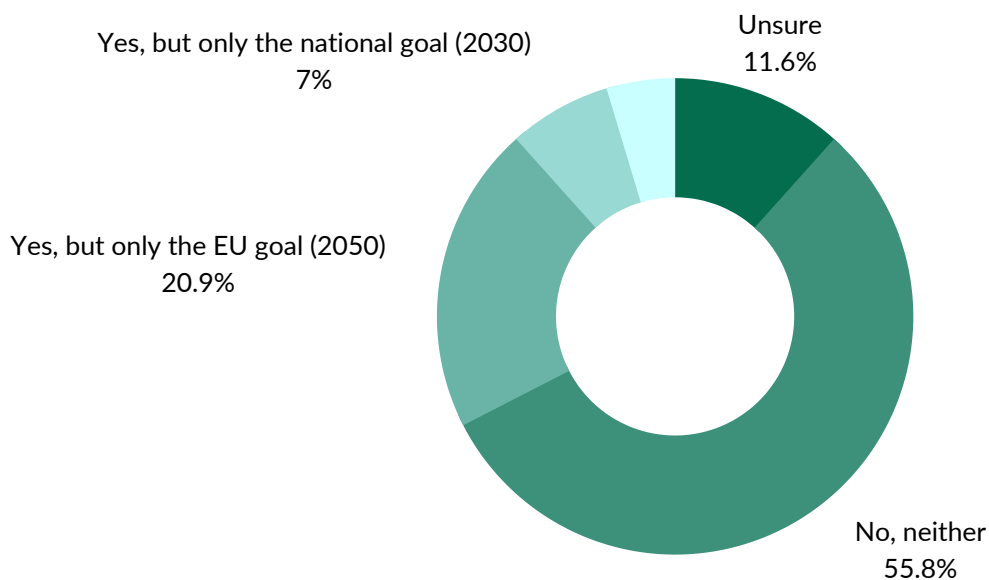


To elaborate on this emphasis on the government's role, we asked them which of the Belgian governance levels is most qualified to handle energy policy and provision. Remarkably, the federal level wins both rounds, with the regional and local level lagging relatively far behind.



Government policies and their effectiveness

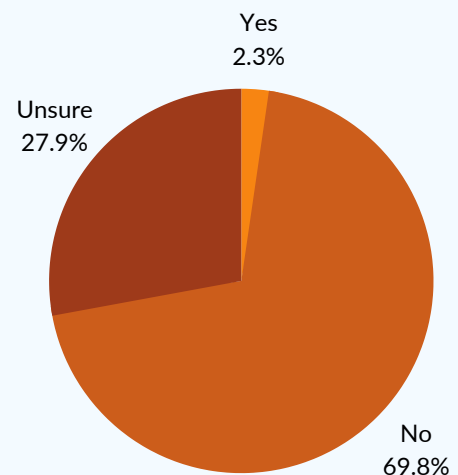
Speaking of carbon neutrality, what do the different levels of governance have in store for us? According to the current plans, the European Union (EU) wishes to be completely carbon neutral by 2050. It even enshrined this goal in the most recent climate law, which includes a 2030 target by which the EU must reduce emissions by 55% (as opposed to 1990 levels). Belgium's current plan (which was written before the climate law deal), intends to reduce emissions by a mere 35% (as opposed to 2005 levels) by 2030. Be that as it may, ambition can be at odds with reality. The majority of our respondents (55,8%) believe neither goal will be met. Roughly 21% only have faith in the EU goal, and an even lower number (7%) believe in the national one. Only 4,7% believe both goals to be attainable.



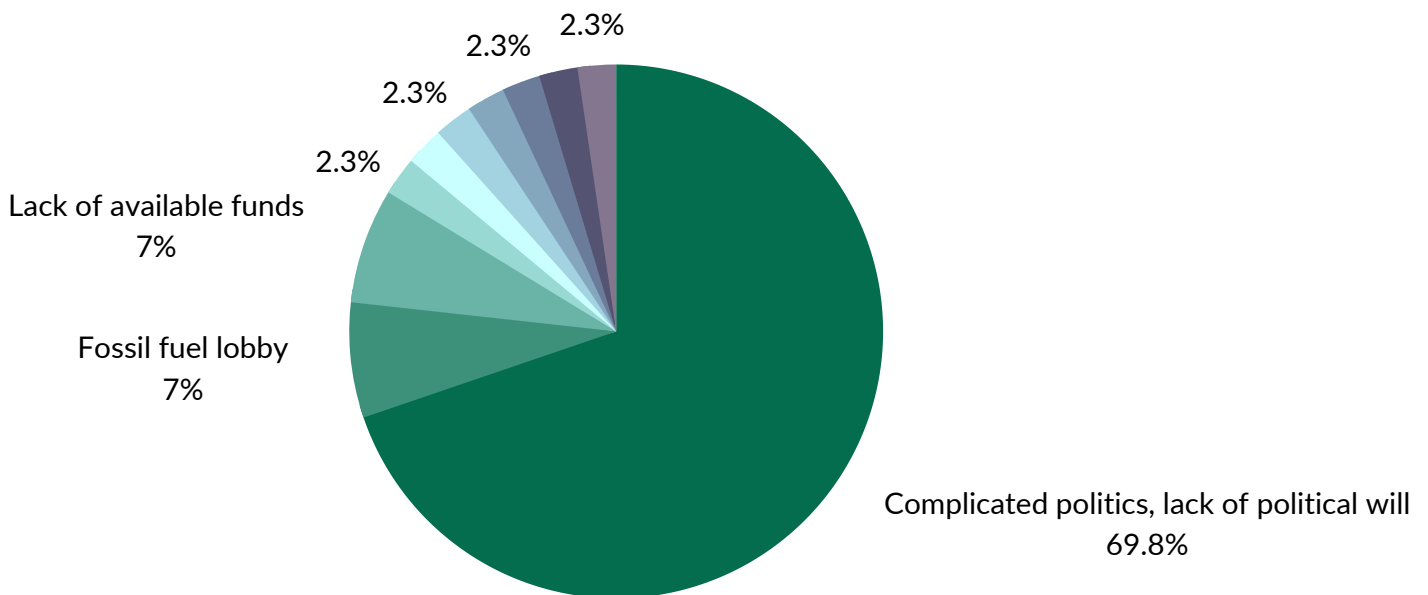
Circling back to a more general assessment of Belgium's sustainability efforts, it seems that the majority (69,8%) of our young respondents find the current efforts insufficient. According to them, we are not doing well in regards to reducing emissions, which can also be illustrated by the previous question, with only 13,7% believing that we will reach our national emission reduction goal by 2030.

Do you think Belgium is doing well in regard to reducing emissions?

43 answers

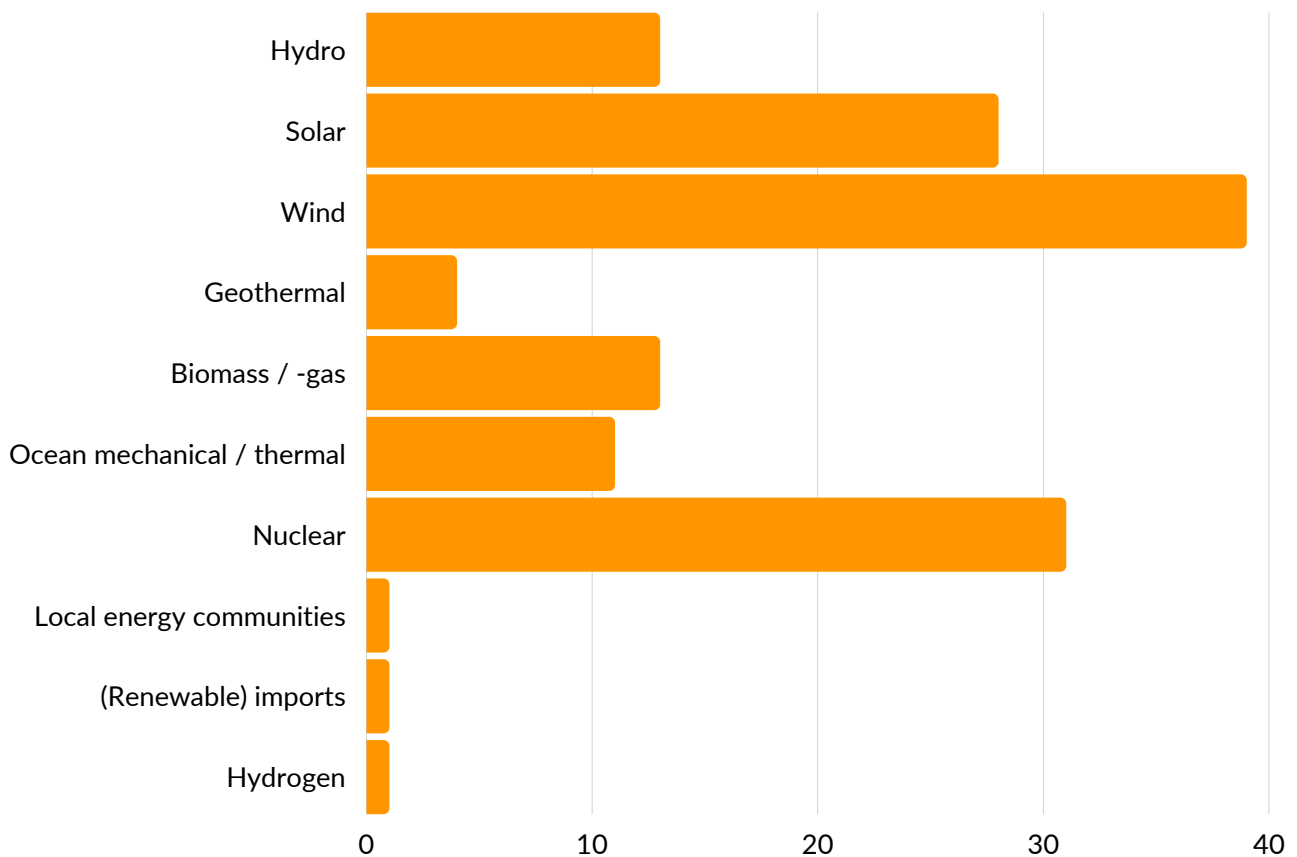


Given the perception that we are not doing well in regard to achieving reducing emissions, what could be the cause of this? What is the main reason for Belgium’s insufficient green energy supply? A remarkable majority of respondents (68,9%) believe this is due to the lack of political will / complicated political landscape in our country. Besides this, the fossil fuel lobby and a lack of available funds each represent 7% of respondents. Other reasons that were mentioned are the historical fossil fuel infrastructures and subsidies, the fact that most green energy is harnessed from uncontrollable sources (winds, brightness) as opposed to fossil sources, a lack of available technologies, a lack of available space as well as the difficulty of permits, a lack of potential from green energy (Belgium’s small and flat territory, with a short coastline, too north for solar energy), the overall societal system of capitalism, and a general counterproductive mindset.

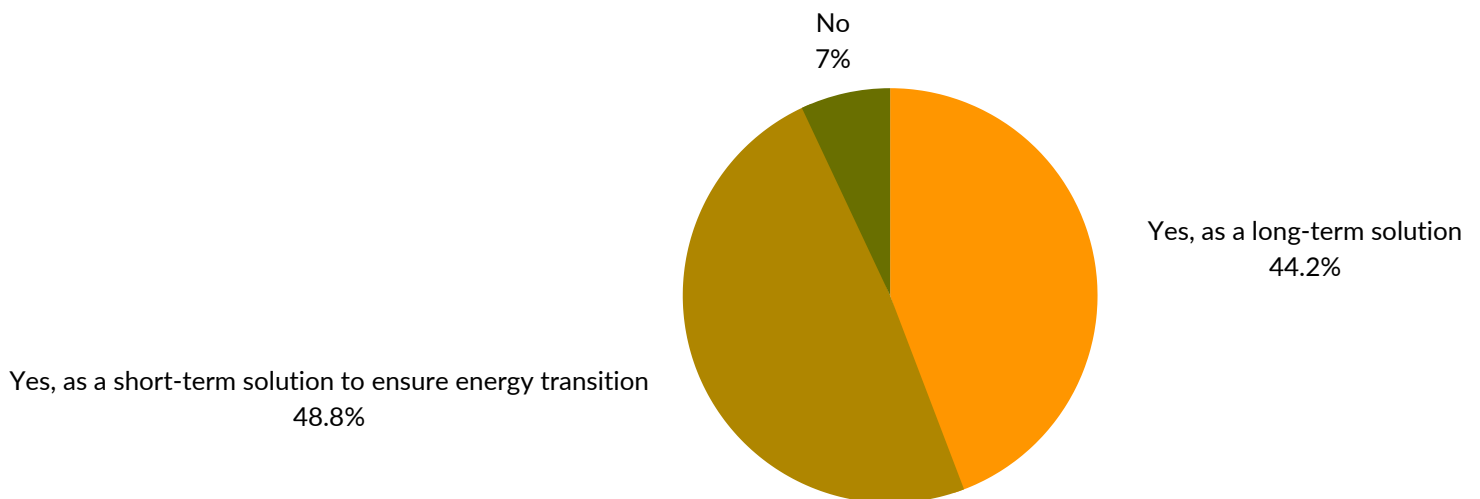


The current and future technology mix

Carbon neutrality is defined by the EU as having “an economy with net-zero greenhouse gas emissions.” This objective is at the center of the famous Green Deal (2019). Yet the question remains: how can we make this happen? After taking a look at different energy options, young people in the sector seem to have the most faith in wind, nuclear and solar energy. This is followed by hydropower, biomass/biogas, and ocean mechanical or thermal energy. According to data from the CREG, nuclear power accounts for roughly 30% to 40% of our power supply. Another 20% comes from gas, with renewables (solar, wind, hydro) accounting for around 15% combined.



The topic of nuclear energy is a slippery slope, especially in Belgium. While the nuclear exit is legally determined to happen by 2025, policymakers have neglected the necessary transition during the past decades. This has created the dilemma we're now in: having to give up about 30-40% of our energy supply, with no (sustainable) backup prepared. Nuclear energy was the 2nd favorite option of young people in regards to the future of energy sources, and many believe it is a key aspect of our energy sector. A slight majority (48,8%) even sees it as a long-term solution.

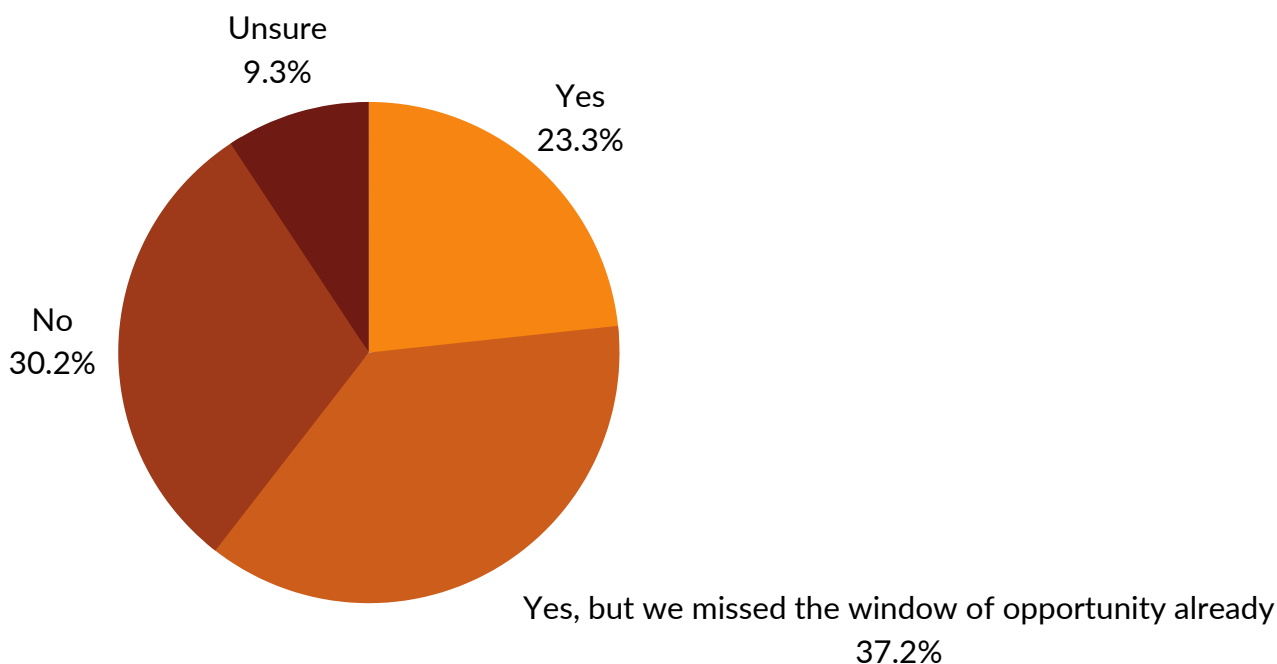


COVID-19: sector disruption or status quo?



... of our respondents agree that COVID-19 can be used as a critical turning point in the energy transition, but more than half of them believe that we missed the window of opportunity already.

Because of the current exceptional circumstances, we asked whether COVID-19 could be a potential turning point for the energy transition. Disruption tends to cause a critical reflection of what went wrong, which is happening in many sectors. In our globalized world, the pandemic has had a large impact on decentralized production and supply processes - for instance, those of computer chips. The energy sector is no exception. Our final question asked whether COVID-19 would bring about a critical turning point. Most of the respondents would agree (60,5%), but more than half of those would say that we missed the window of opportunity already. Another 30,2% believe COVID-19 did not provide a critical moment for sector disruption.



Interviews with professionals

Get to know our interviewees

We also interviewed 6 young professionals in the energy field to submit a more elaborated analysis based on their experience to get a more defined image of the current state of the energy business in Belgium. The interviews revealed that the nuclear phase-out and the fragmentation of rules and regulators are the most pressing challenges for Belgium's future. The role of incentives and energy communities is also highlighted in the conversation. All of the interviews begin with a brief statement about the present state of the renewable energy business in Belgium. The opinions expressed are those of a single individual and do not represent the views of any company, that is why the interviewees preferred to stay anonymous. Following that, the conversation shifted to diverse topics based on the interviewees' fields of expertise.

An overview on the current state of the renewable energy sector in Belgium: nuclear phase-out

Due to its uncertain and over-dimensioned grid connectivity, there is a lot of work needed to integrate renewables in the Belgian renewable sector, which is the main subject of contention. The most difficult task is replacing outdated nuclear power facilities with renewables, not because of a lack of power, but rather because of renewables' unreliability. In fact, because nuclear power has a lot of inertia and adapts to grid variations, it currently produces half of the reactive power required for voltage regulation and avoiding blackouts. As a result, nuclear power should be seen as a grid-balance guarantee.

Unfortunately, the concept of reactive power is unappealing, and because no one really knows it, it's difficult to fathom and debate. Furthermore, half of Belgium's current power capacity would have to be replaced with minimal reactive support, making the system weaker. Although the synchronous condenser, power voltage source converters, and other devices can support reactive power, this complicates a network that was not designed to work this way. Similarly, international connections with Germany and the United Kingdom may be able to help stabilize the network.



The nuclear phase-out debate is not straightforward. On the one hand, the shift is based on difficult technological principles as well as essential talks over an unprepared power network, which is frequently kept hidden from the public. Renewables and batteries, on the other hand, are not yet capable of ensuring system adequacy, the ability to provide power for extended periods of time, and the absence of blackouts that could impact neighboring countries. These unseen aspects of the renewable transition are what makes it so difficult.

Furthermore, it is critical to recognize that there will never be a market for additional nuclear reactors. Additionally, it will be impossible to pay a fixed subsidy throughout the whole of the project's lifespan, which is more than 40 years. To be valuable, new power plants in the UK, for example, require flat pricing set by the UK government at 95£/MWh. Maintaining some of the younger power plants for longer periods of time in order to bridge the gap, together with more renewables and storage, is preferable than using gas power.

1) Nuclear will be substituted by gas: bad, but not too bad.

To deal with the aforementioned issues, nuclear power will be replaced by gas rather than renewables. Even while it may seem contradictory, switching from a clean source like nuclear to a more polluting one like gas might actually help Europe, owing to the European Emission Trading System (EU ETS). CO₂ emissions are subject to a cap and a cost under the ETS scheme. The more a corporation pollutes, the more certifications from cleaner sources it will need to purchase. As more polluters enter the market, the cost of CO₂ per ton will rise, potentially pushing dirtier technology out of the market sooner. Therefore, as a counter effect, low-efficiency lignite coal power plants from Poland or combustion oil power plants will not be profitable anymore.

As more polluters enter the market, the cost of CO₂ per ton will rise, perhaps causing dirtier technologies to be phased out sooner.



2) The residential sector: Energy Communities, Solar PV and Energy Efficiency

Energy communities: the silent push

Energy communities, as defined by the European Commission, coordinate collective and citizen-driven energy actions to assist paving the way for a clean energy transition while putting citizens first. They can be thought of as a collection of like-minded persons, and Belgium has one of the largest numbers of energy communities per capita. Despite the efforts of organizations such as RESCOOP to promote energy communities at the end-user level, despite the fact that the concept has been in place for more than 20 years, these groups are not accorded enough weight at the decision-making level.

SMART meters

The focus of this part is on residential SMART meters. The Ferranti meter will no longer work, according to a recent statement from the Flemish regulator. Who has a new structure and an electrical meter that will be replaced by digital meters. There was a court ruling prohibiting people from spinning back meters in order to consume free electricity from the grid, therefore there is no 15-year guarantee for PV and heat pumps to use energy, making people feel tricked. People in the industry became enraged, the ruling rewarded in real time, and some people were exploited.



Ferranti meter

This is fair since it neatens up the jumbled situation created by the current regulation. The law prohibits gas and oil systems, as well as heat pumps, from being used primarily with PV. As a result, this is more of a "stick" approach, as property costs may rise, but the incentives are limited to renewable energy and high-quality insulation.

It's also worth noting that as a renter, there's absolutely no reason to renovate. The system is owned by the owner, therefore the expenditures are borne by the owner, but the resident is the beneficiary. This is a significant barrier for PV, as these regulations need greater energy classifications. For these reasons, certain homes are unrenovable.

Energy Efficiency

The most essential benefit of energy efficiency is that it reduces energy usage and thereby pollution. Furthermore, it is critical to lessen the financial burden of new installations and home modifications while encouraging more citizens to participate in these initiatives. Cooling and heating may become more significant as more renewable energy is installed. Due to the fact that all new residences will be electrified, boilers or heat pumps that operate on market rates will be able to take advantage of free power or even be paid to consume electricity due to negative prices.



On the other hand, it is necessary to be aware of energy efficiency's finite potential and potential hidden catches. To begin with, increasing efficiency has a rebound effect: consumers are enticed to consume more energy elsewhere as they perceive decreased consumption. For example, we now have fuel-efficient cars, yet those are also larger. Second, energy costs will soon be so low that it will be considered free, rendering efficiency obsolete and the reduced economic impact of improvements obsolete.

As technology improves, the necessary investments to launch new competing technologies into the market may eventually stifle innovation. A similar tendency may be seen in the reduction of investments in alternative renewables, as solar and wind gain prominence. As a result, excessive efficiency may obstruct the implementation of superior alternatives.

In terms of financial assistance, KBC is assisting with the renovation of homes. Many of the financial instruments from the European Investment Bank (EIB) are for banks to offer businesses loans where the EIB is a warrant, and those from Belfius are for banks to lend businesses loans where the EIB is a warrant (who takes the risk).

Who should push more for the renewable transition: government or business?

In general, the government should normalize the situation by making it technology-neutral, as it should not be in the position of making decisions, as they occasionally “choose” the winning technology. These positions cause grid instability and fluctuation, whereas a mix of offshore, biogas, biomass, solar, and geothermal energy, as well as grid integration, is beneficial for balance. Belgium also has favorable geographical circumstances for the development of hydropower, offshore wind, and other renewable energy technologies. There are also good industrial examples, such as Colruyt and the port of Antwerp, which utilize a significant amount of energy in Belgium and are transitioning to a more renewable consumption model. Furthermore, the Google data center battery installations serve as additional services to the TCO in addition to serving as a backup for the data center.

Furthermore, financial support is plentiful in Belgium: provincial, European, and Flemish subsidies are available. Clients are willing to try new things, and there is a lot of enthusiasm for new ideas, thanks to the horizontal management. There is also a lot of money available to assist, establish, and launch an energy company. As a result, corporations may and should be a driving force in a market driven by competition, as companies will be able to make the change faster.

Financial incentives, on the other hand, may not be sufficient to encourage people to enter a subject with a long history and a high entry barrier. Furthermore, in Belgium, a corporation must deal with four distinct authorities, which hinders corporate development because it necessitates local customisation, a reduction in economies of scale, and thus higher risks.



If you could change a piece of policy, what would that be?

A few proposals:

- A single minister for energy policy execution, so that policies are formed as a single mind with a single idea. European legislation will be implemented more quickly.
- Lower market entrance thresholds, as some participatory restrictions obstruct or obstruct small businesses.
- Impose a gas-to-electricity tax shift. Power is hyper taxed up to 25% of its cost, some of it is grid tariff, and some other things aren't related to electricity but are promoting electrification. Natural gas should be taxed more heavily in order to encourage the use of electric boilers or heat pumps.

COVID-19 has resulted in a huge drop in market and strategy-oriented advisory positions related to green energy, among other things, as organizations have focussed on their core capabilities.

The job market: an insider's perspective

Many enterprises in the renewable energy industry are prospering, and there is a growing awareness that this is the way of the future, and it is no longer a question. As a result, businesses are adapting and modifying their tactics. As a technician or to assist existing project managers, it is rather easy to get work in these fields. On the downside, COVID-19 has caused a significant reduction in market and strategy-oriented consulting employment as corporations have honed in on their core competencies. At the corporate level, young professionals can only advance to public posts after working in the private sector for two or three years.

A curious point was also raised during the discussions. Looking at the future of the job market in energy, what will happen when the renewable energy penetration reaches 50% or 80%? Who is going to pay the wholesale electricity price when generation is already very high? And most importantly, if we push for a rapid transition to renewables, how are the gas and nuclear people going to be trained to be shifted into the new renewable energy?

These are key points to monitor in the future, as they will be major problems to assure the sustainability of the energy sector in Belgium.

Conclusion

Belgian Next Gen: Future of energy report 2021 ends with the highlights of the most important information and commitments to continue to work on making the Belgian energy sector more sustainable.



Political landscape

- The responsibility and authority are too scattered;
- Centralize the decision-making.



Nuclear phase-out

- There is no market for additional reactors;
- For the time being, the existing ones are required for energy security and reliability.



Energy mix

- Keep the Energy Trilemma Index in mind (security, sustainability, equity);
- Invest in many different energy sources.



Energy communities

- When it comes to decision-making, energy communities require greater weight.

Belgian Next Gen's mission is to educate, inspire, and motivate you to take action. Talk about this report, share it, self-advocate. A simple deed can have a large impact.

Acknowledgements

This report was motivated by a profound interest in the Belgian energy sector, to map the environment in which our organization operates. YES-Europe Belgium worked hard to realize this report and wanted to acknowledge those that made a difference, in no particular order:



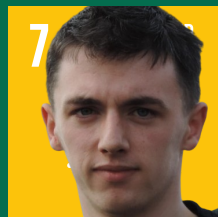
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We want to thank the interviewees who wished to stay anonymous. And last but not least, we thank you. Thank you for reading this report.

About us



We are always looking to expand our organization! Interested in becoming a member? Then make sure to contact us at belgium@yeseurope.org

Emma Van Coillie	Country Representative
Niko Vandebos	Project Lead
Jacopo Sala	Industry Expert
Nienke Dhondt	Industry Expert
John Bracken	Project member
Colin Rogiers	Project member
Tess Van Deynse	Project member

What is YES-Europe?

We want to give a platform where youth can act and lead their own initiatives.

Who is YES-Europe?

YES-Europe, created through an initiative of the EPFL University of Lausanne in Switzerland, brought together 50 students from nine European countries for the first annual conference organised in May 2016 to connect and find meaningful ways to make a difference in the energy field. Since then, YES-Europe grew internationally to have an impact at the European level.

What does YES-Europe do?

YES-Europe offers a platform to develop both international as well as national initiatives to shape the future of energy in Europe and give a space for youth to act within this fundamental transition.

Believing in individual as well as collective creativity, we support each other in brainstorming, developing & implementing ideas.

Contact

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