

Annual Report 2005

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Clingendael International Energy Programme (CIEP) in 2005

Introduction

Energy continues to feature prominently on the political agenda, and as a result, was also covered extensively in the media. Among the prominent institutes in Europe that study energy matters and international relations, demand for CIEP's expertise is growing. Often representatives of other European countries consult us on European energy security issues. In addition, the requests for lectures and interviews has greatly expanded in scope.

CIEP continued largely on the same footing as the previous year based on the plan and estimated budget as described in the document *CIEP 2005-2008, Towards a European Forum* and agreed upon by the Board of Stichting Fonds Clingendael and the participating institutions.

For CIEP as an organisation, 2005 was a knowledge year. Triggered by geopolitical developments, CIEP took the Study of Geopolitics and Energy Supply Security conducted for DGTREN in 2003/ 2004 back to the drawing board, focusing on possible futures for the international system and its consequences for energy policy. The results of extensive research and brainstorms can be found in several 2005 publications. The analytical framework will not only be used for energy security research, but also in research on international corporation on sustainability issues and while looking at consequences for the liberalisation of energy markets.

In preparation for the IGU world gas conference 2006, CIEP is executing two special international projects, one of gas to power and the other on regulation. For these projects several international seminars were organised as well as an extensive round of consultations with international experts. The electricity market research looked at possible regional market approaches both in a Clingendael Energy Paper as in a seminar. Balanced attention was also given to the pro's and cons of ownership unbundling in the electricity sector as planned in the Netherlands. CIEP also took notice of the renewed attention for nuclear energy, putting emphasis in 2005 on non-proliferations issues. An important event was the publication of the book "30 jaar Nederlands Energiebeleid". The book was very well received, resulting in unexpected high demand. At the end of the year 1000 copies had been sold out of a total print run of 1100.

CIEP's sustainability research, the youngest of CIEP's research themes, took on more shape. The first two seminars were organised in the future fuels series. For the seminar on biofuels a discussion paper was prepared.

An important feature of 2005 was intensified cooperation with various stakeholders in the energy sector in discussion groups. The various research results were jointly discussed and developed in brainstorm groups. The brainstorm groups bring together academic, policy and business knowledge and were instrumental to set the agenda for CIEP's activities. The brainstorm groups have not only become a powerful instrument for research, they are an integrated part of the CIEP platform function, examples of CIEP as a network organisation and a contribution to CIEP as a knowledge centre.

Research and activities

The research in 2005 took place within the three CIEP themes:

- A. The regulation of energy markets (oil, gas and electricity) in the European Union.
- B. The international economic and geopolitical aspects of the oil and gas markets, mainly with respect to the security of oil and gas supply in the European Union, in the context of an increasing dependence on imported energy.
- C. Energy and sustainable development

A. The regulation of energy markets (oil, gas and electricity) in the European Union

Natural Gas Markets

Also in 2005 CIEP facilitated discussions on recent development in global and European gas markets within the framework of the CIEP gasgroup. The group has been extended by participants from organisations who joined the group of organisations supporting CIEP in 2005 and now comprises 15 regular members. Working groups have been formed to analyse the following issues and to present their findings in short briefing papers: business models for Liquefied Natural Gas chains, gas infrastructure developments in European gas markets, the short to medium term gas supply outlook in the United Kingdom, competition in European natural gas markets and pricing of natural gas in Continental Europe.

A focal point for natural gas research has been the European market for seasonal gas storage. CIEP produced a discussion paper on the issue, showing that investments in storage volumes are slowing down in relation to gas demand growth. Possible reasons for this development as well as the consequences were discussed in a very well attended expert roundtable in October (see below). Interviews with individual stakeholders were conducted in the course of December and the updated discussion paper will be re-published in early 2006.

CIEP was involved in 2005 in the International Gas Union's special project 'Regulation of Gas Markets'. With this project, IGU seeks to assemble new perspectives on the way the gas industry could, or should, be regulated to meet its future challenges. Outcomes will be presented at the World Gas Conference in Amsterdam in June 2006. The project is sponsored by EnergieNed.

For this project CIEP has drafted a study on gas market regulation, against the backdrop of changes in international gas markets. In small, regional workshops with a limited number of selected opinion leaders and decision makers from the stakeholder groups and academia, the intermediate findings have been discussed and reviewed. The first workshop, organised in Florence in September/October jointly with the Florence School of Regulation focussed on the situation in European gas markets, whereas a second workshop held in Washington in December (organised jointly with the Dutch embassy to the United States) discussed gas market regulation in the United States.

Work continued as well for IGU's special project 'Gas to Power'. The discussion paper which had been prepared in 2004 for the workshop 'Gas to Power in Europe' was updated and re-published in April 2005. Further discussions with various stakeholders (Eurelectric, Eurogas, individual government and industry representatives) took place and the again updated work will feature in IGU's project presentation at the World Gas Conference in Amsterdam in June 2006.

Electricity Markets

CIEP contributed very significantly to the discussions around European and Dutch electricity markets in 2005. Being unsatisfied by the quality of public discussions, CIEP took the initiative for a conference on the plans of the Dutch Minister of Economic Affairs to require ownership unbundling for Dutch electricity and gas distribution companies. Such plans exceed the requirements imposed by the European directives on gas and electricity markets and thorough and informed discussions appeared warranted. This conference, held in February, gave a fair and balanced discussion of the arguments in favour and against such plans and was very well attended and appreciated. A briefing paper on the topic accompanied the conference.

An international expert audience discussed on basis of presentations of speakers from Spain, Italy, France and the Netherlands in April recent developments around the further integration of European electricity markets. The seminar 'Regional electricity markets in the European Union.' focussed in particular on the North-West European region, drawing on experiences made in other European regions so far and was very well received.

CIEP also continued to host regular meetings with experts from the Dutch energy sector within the framework of the CIEP electricity group. Apart from the factual discussion the meetings aim at the facilitation of more interaction between various stakeholders in electricity markets. CIEP was able to attract distinguished experts to provide introductions to the individual sessions. Topics in 2005 were: 'Welfare consequences of the first Dutch electricity distribution price control' (9 March, introduction by Paul Nillesen, Assistant Director, PwC), 'Nuclear energy in liberalised electricity markets' (25 April, introduction by Helmut Engelbrecht, CEO Urenco), 'The EU Emission Trading System and the European power sector' (30 June, introduction by Twan Vollebregt, Managing Director Elan Energy Consulting) and 'Portfolio planning in power generation' (21 November, introduction by Jaap Janssen, Senior Researcher ECN).

The year was concluded by a Clingendael Energy Lecture by Jorge Vasconcelos, chairman of the EU's Energy Regulatory Group for Electricity and Gas, on 'Governance of EU energy markets'. Mr. Vasconcelos took stock of the achievements with respect to liberalisation of EU energy markets so far, drawing on his extensive experience gained from his prominent involvement in shaping the EU's regulatory approaches.

Moreover, CIEP provided to a limited extent advisory work for Nesraad BV. CIEP gave its view on the drivers for electricity and gas markets in order to assess the business opportunities for Zero Emission Power Plants.

Thirty Years Dutch Energy Policy

In May 2005 the study into Dutch Energy Policy formation from 1973 onwards has been presented to the Dutch Minister of Economic Affairs Brinkhorst. The project was a joint effort of CIEP and the Ministry of Economic affairs to formalise some aspects of the history of energy policymaking. The project is drew largely on policy experience of the authors and was supported by research in the archives of the Ministry of Economic Affairs as well as analysis of official documents concerning energy policy.

The study describes a model for analysing energy policy development, together with a broad description of the leading issues that have influenced energy policy in the seventies, eighties and nineties. Some more specific policy dossiers are analysed in detail, such as:

- market liberalization and regulation;
- oil policy in the seventies;
- nuclear policy in the eighties;
- sector restructuring in the nineties.

In addition, the book contains a number of interviews with (former) policy makers and other experts who played key roles in the formation of the Dutch policy. It also contains a summary of the results of the in-depth policy-examinations by the International Energy Agency.

B. The international economic and geopolitical aspects of the oil and gas markets, mainly with respect to the security of oil and gas supply in the European Union, in the context of an increasing dependence on imported energy

European energy policy

Research on European energy policy takes the Security of Supply study published in January 2004 as a starting point and builds on its main conclusions and recommendations. Given the recommendations of the Green Paper (November 2000) and given the developments in international relations since, e.g. the relations with the US, Russia and China and the developments in the main producing countries, such as the Persian/ Arabian Gulf region, the outlook, context and space for EU external (energy) policies has changed. Security of energy supply is increasingly becoming an integral part of the foreign policy agenda. This poses particular challenges to the EU because the EU foreign and security policy is still very much a work in progress. Moreover, the exposure to security of oil and gas supply is asymmetric among the member states. The current policy toolbox of the EU and the individual member states is incomplete to deal with these new challenges, such as instability in key producing regions and competition for resources with main consumer countries. Furthermore, the existence of asymmetric risks may require a much more regionalised response, which could run counter to the attempts of the Commission to develop top-down common tools. The regional approaches could enhance regional security of supply bottom-up but could run counter to the attempts to create one energy market space in the 25 member states. In this project both the external dimensions of the EU oil and gas markets and the internal dimensions of EU policy making are dealt with. The focus will be both on developments in security of supply policy making at the EU level, the regional and the member state level as well as on developments in main producer and consumer regions. Moreover, oil and gas market structures and company strategies within member states as well as from companies exporting to the EU are also studied within the context of this theme.

Security of Supply Standards

As part of the security of supply policy research, CIEP is developing, together with ECN, a model with which a security of supply standard can be developed for the entire energy system of a member state. Thus far, security of supply in Europe was always approached on a fuel by fuel basis, ignoring the synergies different fuels can provide (for instance in dual firing power plants) but also ignoring the interlocking vulnerabilities among certain parts of the energy sector (for instance the need for power in compression stations in oil and gas pipelines). The idea is to develop a quantitative measure for overall security of supply.

In the absence of a common energy policy (which could imply expensive top-down use of instruments such as strategic gas reserves) and including the asymmetric risks exposure, member states are enabled to use the synergies their energy systems provide and to choose security of supply instruments that are effective for their energy system but, yet, reduce the risk exposure to neighbouring member states with which they have cross border energy trade. The latter is an example of inviting bottom up solutions. In the course of 2006 a report will be presented.

Energy supply and Foreign Policy

An assignment by the Advisory Council on International Affairs (AIV) and the General Energy Council (AER) has resulted in a draft CIEP report on 'Energy supply and foreign policy'. Based on this research CIEP further developed geopolitical scenarios that serve as a context for developments in the international oil and gas markets. This study, *Tomorrow's Mores The International System, Geopolitical Changes and Energy* was published in December 2005, and was also made available to the Energy Council.

International relations, risk analyses and energy

In order to understand the geopolitical context in which energy relations develop, CIEP is involved in research with other institutions. In December 2004, a new project has started that attempts to apply risk-analysis to important issues in international relations (failed states, terrorism, energy, to mention a few). This project of the Eurasiagroup of New York is led by Paul Bracken from Yale University Business School, Ian Bremmer of Eurasiagroup and David Gordon (NIC) and financed by the National Intelligence Council of the US. CIEP was asked to supply this study with an energy risk study based on the risk chapter of the EU study. This chapter was presented on 30 September 2005 in New York to an audience of American security experts and was later used as an important input in the above mentioned study on geopolitics and energy supply. The results of the Eurasia project will be published in a revised edition with Cambridge University Press in 2006.

Russian energy politics

Russia has recently strengthened its position in international oil markets and is actively seeking to consolidate its position in the international gas market. The importance of energy exports for the Russian economy is increasing, and in order to solidify their position in international energy markets, the efficiency of Russian energy demand must be improved. Together with MGIMO, part of Moscow State University and linked to the Ministry of Foreign Affairs, and EDI, CIEP did research on Russian energy matters.

North-East Asia

Asia will grow into the largest consumer of energy in the coming decade, while the indigenous energy resources, except for coal, will be far from sufficient to satisfy demand. CIEP focussed on the region, which will be most important in the coming ten years, namely North-East Asia. China has to fuel its economic growth and is looking for secure energy supplies. China will be an important competitor in this respect for the European Union. China has manifested itself so far in the Caspian Region and in negotiations about Russian supplies to China and the connected infrastructural plans. These developments have unsettled the largest economy of the region, Japan. Japan has always been heavily dependent on imported energy.

However, it has so far not faced a neighbouring rival to its energy supplies. At the same time, oil production in Indonesia is declining. Japan is therefore also counting on Russia for future energy supplies, in addition to supplies from the Persian Gulf. Complicating factor with respect to China is climate change. It is crucial for climate change policies to be successful that China will find other energy sources than the locally available coal deposits. CIEP joined in a research project of the International Institute of Asian Studies (IIAS – Leiden) and Energy Geopolitics Ltd. (Japan).

Reserves project

In co-operation with the Technical University of Delft (TBM), CIEP has set up a research project that focuses on databases and statistics on oil reserves. The topical discussion of proved, possible and probable reserves have been analysed within a broader context, taking into account technical, (socio-)economic, institutional and (geo)political dimensions. In 2005, three students started their Master's Thesis Project as part of this project.

C. Energy and Sustainable Development

Present world-wide energy supply is dominated by fossil fuels and in the coming decades is expected to remain so. With ever growing demand, however, meeting the world's future energy demand is going to be a major challenge. There is little doubt that we will eventually change to a new energy system. The pace of change is still far from clear, however.

Drivers for change will be a combination of geological availability and geopolitics of fossil fuels, the rising, mainly energy-induced emissions of CO₂ in the atmosphere, and the new options that become available via technological development. It is predicted that the energy system of the future will continue to show substantial diversity, as a new technology that can take over the present dominant role of fossil fuels is not in sight.

The need to ensure a long-term supply of energy creates a renewed interest in the large existing non-conventional hydrocarbon resources (heavy oil, tar sands, gas hydrates etc.) and for coal, which can provide centuries of consumption at the present rate. New technologies which make it possible to transform these different resources into clean fuels and energy while minimising CO₂ emissions are required. Will clean fossil energy be the technologists' answer to global warming? Will wind, biomass and solar win over hearts and minds sooner than expected? Or can nuclear energy provide a solution?

The coming decades are described as a transition period for the energy sector, in which a transition from fossil fuels to sustainable energy sources has to be achieved, and the ever growing energy demand has to be kept in line with the availability of these sources. However, opinions about the length of this transition period, and the technologies used after transition to a low-CO₂ energy sector, differ widely. A wider debate on energy transition in the coming years therefore is necessary.

CIEP's aim is to contribute in particular to the international political aspects of this energy transition debate. In 2005, this has been done in several ways. Lectures and interviews have been given by CIEP staff, training courses have been organised and discussion papers written. Outstanding activities were start of a new series of CIEP lectures on future fuels that might, or might not, be game-changers in the energy sector. Also, the CIEP started a new discussion group on energy & sustainable development. Participants from oil companies, government, energy suppliers and ngo's take part in this group, which was set up based on the successful models of the existing CIEP discussion groups on gas and electricity. Furthermore, in September 2005 a new CIEP staff member was appointed, who will focus its activities on energy & sustainable development.

Training Programmes

Training and education are an important part of CIEP's work. It is aimed at responding to a growing need for an integrated approach to energy training.

To gain a better understanding of the complexity of national and EU-policy, international politics and market developments in energy the Clingendael International Energy Programme designed its own energy curriculum in 2005 consisting of one-day modules organised along the lines of CIEP research themes and drawing on CIEP's research and vast experience in lecturing and customised training. The CIEP modules were a success, both in the number of participants as in the quality, which was underpinned by the returned evaluation forms.

15 March 2005 : 'Energy and Geopolitics'
24 May 2005: 'Energy and Liberalisation'
12 September 2005: 'Energy and Climate'

CIEP also offered training programmes customised to particular needs and interests.

26 August 2005: 'Energy course' NUON
23 August 2005: Workshop "Scenario analyse China in 2020" for MeesPierson together with. CCSS/TNO.

In addition CIEP staff lecture in courses of the Clingendael Institute, of the Energy Delta Institute, Groningen University and Delft University and in a series of events throughout the year.

Knowledge Centre

An important task for CIEP is to provide the general public with information on energy related topics. This is done in part by CIEP's own activities and publications, but also by giving public lectures and interviews to the media. In 2005, over 200 presentations, lectures and interviews were given by CIEP staff. Also, a redesigned CIEP website is launched. Matching the Clingendael website in design and navigational structure, the new website is easy to navigate and contains information on publications, activities and training programmes.

Network

CIEP is primarily a network organisation. CIEP is a small organisation and does not intend to compete with other energy oriented knowledge centres, but rather works to complement and cooperate with many of these institutions. Positioned between the private sector and public institutions, between scientific research organisations and consultants, CIEP strives to achieve its mission and objectives through cooperation across its extensive network.

CIEP has initiated discussions between different experts within its extensive network. For example meetings between energy and environmental experts and energy and security experts served as a sounding board on new issues in international and national energy. The various study groups and meetings with CIEP supporting institutions are also network events. Discussion workshops with the NMP/RIVM and CE Delft have been organised in August 2005 to intensify cooperation with these organisations. The working relationship with ECD was improved with a combined research project.

CIEP Supporting Institutions

In 2005, CIEP was supported by the following institutions:

- Dutch Ministry of Economic Affairs
- Energie Beheer Nederland
- N.V. Nederlandse Gasunie
- ING Group
- NAM
- N.V. NUON
- Oranje-Nassau Groep
- Total E&P Nederland B.V.
- Rotterdam Municipal Port Management
- Shell Nederland
- Dutch Ministry of Housing, Spatial Planning and the Environment
- Vopak Oil Logistics Europe & Middle East B.V.
- Essent
- Eneco
- BP
- Wintershall
- Dutch Ministry of Foreign Affairs

These institutions are a cross-section of energy sector stakeholders in the Netherlands. The companies are major international players in their field of expertise. The public institutions understand that national energy policy is largely influenced by international developments. The institutions contribute to CIEP's knowledge base and *vice versa*, especially within the CIEP Advisory Board and the Contact Group. Furthermore, staff members from the institutions participated actively in 2005 in CIEP research and study groups, e.g. Gas Study Group, Electricity Study Group, the Sustainability Group en the Interdepartmental discussion Group.

CIEP Network

Within the Netherlands, CIEP has working relationships with a wide variety of institutions, including:

- Energy Delta Institute (EDI)
- Energy Centre Netherlands (ECN)
- International Institute for Asian Studies (IIAS)
- Technical University Delft (TUDelft)
- CE Delft
- Netherlands Environmental Assessment Agency (MNP)
- Algemene Energieraad

Internationally, the CIEP network spans the following institutions:

- European Policy Centre (EPC)
- Royal Institute for International Affairs (RIIA, Chatham House)
- Oxford Institute for Energy Studies
- European University Institute Florence
- Institut Français des Relations Internationales (IFRI)
- DGTREN (European Commission)
- International Energy Agency (IEA)
- Columbia University (New York)
- Yale University Business School
- The Judge Institute, Cambridge University, UK
- World Energy Council (WEC)
- Institute for Political and International Studies (IPIS, Iran),
- Moscow State Institute of International Relations (MGIMO)
- Waseda University (Japan)

In 2005, the cooperation between CIEP and EPC, a well-established platform for European policy related discussions, intensified. CIEP will partly function as the energy branch of EPC to place more of the conferences and debates in an EU context.

Internal Organisation

CIEP is finalising the preparations in the administration that will allow the allocation of staff and budgets to the different public activities, research projects and other activities. In this way, CIEP wants to create more transparency with regard to time, money and output. CIEP has started with time registration. It will allow CIEP to prioritise time and assets, once the two systems have been harmonised.

Overview

CIEP publications

The following overview highlights a selection of publication, most of which are available on the CIEP website. CIEP (associated) staff published articles in newspapers, scientific journals and other formats that are not mentioned here.

Energy Publications

- *'Dertig Jaar Nederlands Energiebeleid: van Bonzen, Polders en Markten naar Brussel zonder Koolstof'*
Jacques de Jong, Ed Weeda, Theo Westerwoudt, Aad Correljé
CIEP Energy Publication, The Hague, Clingendael Institute, May 2005

Studies

- *Tomorrow's Mores: The International System, Geopolitical Changes and Energy*
Femke Hoogeveen and Wilbur Perlot (Eds.)
CIEP Study, The Hague, Clingendael Institute, December 2005

Papers

- *The 'Regional Approach' in Establishing the Internal EU Electricity Market*
Jacques de Jong
CIEP Energy Paper, The Hague, Clingendael Institute, January 2005

Articles

- *Energy supply security and geopolitics: A European perspective*
Aad Correljé and Coby van der Linde
In: Energy Policy, 34 (2006), pp. 232-543, published on the internet in 2005
- *Energy in a Changing World*
Coby van der Linde
In: Managing Strategic Surprise: lessons from risk management and risk assessment, Paul Bracken et al., September 2005
- *Verenigde Staten en Europese Unie: Trouwe bondgenoten? : Nieuwe episode in energiediplomatie*
Coby van der Linde and Femke Hoogeveen
In: Internationale Spectator, Juli-augustus 2005
- *De Verenigde Staten en de Europese Unie in Centraal-Eurazië: relaties met regionale mogendheden*
Mehdi Amineh & Henk Houweling
In: Internationale Spectator, Januari 2005

Briefing Papers

- *Can Russian oil growth be sustained?*
Erik Janssen
CIEP Briefing Papers 4, Oktober 2005
- *Moving beyond the stalemate: addressing the nuclear challenge by supranational means*
Ruud Lubbers
CIEP Briefing Papers 3, August 2005
- *Post-Kyoto and the position of the European Union*
Wilbur Perlot
CIEP Briefing Papers 2, August 2005
- *Ownership unbundling of energy distribution companies in The Netherlands*
Christoph Tönjes
CIEP Briefing Papers 1, August 2005

Misc. Publications

- *Drivers for An International Biofuels Market*
Stephan Slingerland and Lucia van Geuns
Discussion paper, December 2005,
- *Energie in een veranderende wereld*
Oratie Coby van der Linde
RU Groningen 22 november 2005
- *Security of Supply: Invest in Energy Efficiency!*
Coby van der Linde and Lucia van Geuns,
Paper prepared for ASEM EMM6, special session on Energy September 2005
- *Energy paper: The European Market for Seasonal Gas Storage*
Discussion paper CIEP, August 2005
- *Waarheen wil Europa met kernenergie?*
Stephan Slingerland en Christoph Tönjes
Press article, de Volkskrant, 27 september 2005
- *Fossil fuels; Reserves and alternatives - a scientific approach*
Lucia C. van Geuns and Linda A. Groen,
Amsterdam, CIEP, Earth and Climate Council (KNAW), 2005
- *Gas to Power in Europe*
Christoph Tönjes
Groningen (Energy Delta Institute), Clingendael Institute (Den Haag), April 2005

Columns

The columns appear in *Energie Nederland* (Energy Netherlands) and are written by Coby van der Linde. They can also be found on the CIEP website.

- Transparant cadeau van nieuwe DG
- Zwakke globalisering
- De prijs van incidenten
- Strategie van de (bijna) Gemiste Kansen?
- Les van Katrina
- Olie en het verdelingsvraagstuk
- Gevoel van urgentie
- Steeds een stap voor
- Horen is geen luisteren
- Gaspec heeft een naam
- Olie en de dynamiek van eindigheid
- Het IEA en vroegtijdig ingrijpen
- Het China Syndroom
- Geopolitiek van het Klimaat
- De gasmarkt 'goes global'
- Russische wetten van de markt

CIEP Activities

CIEP organised a record number of activities in 2005. In total there were 45 meetings, training programmes and conferences.

Events

CIEP organised several activities in 2005, mostly directly linked to research. Detailed information for most CIEP events is available on the CIEP website, including programmes, background information and materials presented during the event.

- Tuesday 20 December 2005
Clingendael Energy Lecture on *'EU energy markets and liberalisation'* by J. Vasconcelos
- Friday 9 December 2005
CIEP Future Fuels Seminar *"An International Market for Biofuels?"*
- 12-13 December 2005
Workshop on *Gas Market Regulation in the United States*. Washington. (CIEP/IGU project on gas market regulation)
Organised jointly with the Dutch Embassy to the United States.
- Friday 28 October 2005
CIEP Workshop *'Geopolitics and Energy Markets'*
Organised at the 'Energy Convention', Groningen
- Monday 10 October 2005
CIEP Workshop *'The European Market for Seasonal Gas Storage'*

- 30 September-1 October 2005
Workshop *Gas Market Regulation in Europe* (Florence)
(CIEP/IGU project on gas market regulation)
Organised jointly with the Florence School of Regulation
- Tuesday 30 August 2005
CIEP Energy roundtable on the occasion of the visit of H.E. Vladimir S. Shkolnik,
Minister of Energy and Natural Resources of the Republic of Kazakhstan
- 23 August 2005
Workshop “Scenario analyse China in 2020’ for MeesPierson together with
CCSS/TNO (long term strategy analysis for MP asset management)
- Monday June 27, 2005
CIEP Seminar "*Transition Policies in the EU and the Role of GtL and CtL*"
- Friday May 20, 2005
CIEP International Conference "*The security of energy supply in China, India, Japan,
South Korea, and the European Union; possibilities and impediments*"
In cooperation with IIAS, Leiden
- Tuesday May 17, 2005
Presentation of Clingendael Energy Publication '*Dertig Jaar Nederlands
Energiebeleid*' 'Thirty Years Dutch Energy Policy'
- Tuesday April 19, 2005
CIEP Electricity Market Seminar: "*Regional Electricity Markets in the European
Union*"
- Wednesday February 9, 2005
CIEP energy market seminar '*Ownership unbundling of energy companies*'
- Monday 31 January 2005
CIEP Mini-seminar for Iraqi diplomats on international energy issues in co-operation
with Shell and ING

Training

- 15 March 2005 : CIEP one-day Energy training module: '*Energy and Geopolitics*'
- 24 May 2005: CIEP one-day Energy training module '*Energy and Liberalisation*'
- 26 August 2005: '*Energy course*' NUON
- 12 September 2005: CIEP one-day Energy training module '*Energy and Climate*'

Meetings

- The *CIEP contactgroup* convened on 8 February , 7 June , 6 September and 13 December 2005.
- The *CIEP Advisory Board* convened on 23 June and 20 December 2005.
- The Board of *Stichting Fonds Instituut Clingendael* convened on 7 June and 1 December 2005.
- The CIEP Gas study group convened 9 times throughout the year.
- The Electricity study group convened on 9 March, 25 April, 30 June and 21 November 2005.
- The Sustainability study group convened on 24 October and 16 December 2005.
- The Platform international energy policy convened on 11 October and 19 December 2005.

Other information

Lectures, Speeches and Presentations

In 2005 CIEP staff members gave a total of 129 lectures, speeches, and presentations or chaired sessions during training courses, conferences and seminars.

Media

CIEP staff members gave over 102 interviews for radio, television and newspapers in 2005.

Website

Since the Clingendael Institute changed to their new website, the number of visitors and downloads were no longer tracked.

Staff

In 2005, the CIEP staff consists of seven people:

Coby van der Linde	director (0,6fte)	(0.7 fte per 1/8/2005)
Lucia van Geuns	senior researcher/deputy	(0.8fte)
Christoph Tonjes	researcher	(1,0fte)
Wilbur Perlot	researcher	(1,0fte)
Femke Hoogeveen	researcher	(1,0fte)
Erik Janssen	researcher	(1,0fte) (until 1.10.2005)
Stephan Slingerland	senior researcher	(0.8fte) (started 1.09.2005)
Wendy Auf dem Brinke	secretary	(0,6fte)

In addition to the core staff, CIEP has 3 fellows and five associate fellows

Jacques de Jong	seconded senior research fellow	(0,8 fte)
Dick de Jong	senior research fellow	(0.2 fte)
Hans Maters	senior research fellow (project basis)	
Aad Correlje	associate fellow	(0.2 fte)
Kurt Radke	associate fellow (project basis)	
Mehdi (M.) Amineh	associate fellow (project basis)	
Paul Nillesen	associate fellow (project basis)	
Reinaldo Figueredo	associate fellow (project basis)	
<i>(since September 2005)</i>		

During 2005 the following people were connected for at least part of the year to CIEP staff:

Reinier van BergeHenegouwen	student intern
Rik Komduur	student intern

Appendix: About CIEP

Introduction

In September 2001, the Netherlands Institute for International Relations, 'Clingendael', launched the *Clingendael International Energy Programme* (CIEP). Supported by twelve institutions from the public and private sectors, CIEP participates in and seeks to make significant and substantive contributions to the public debates on national and international developments in the energy sector.

The main reasons for initiating CIEP were:

1. The need for a forum to discuss developments in the European energy markets, e.g. the liberalisation of the European energy market, which will impact the organisation of the market, government energy policies and strategies of companies operating in the energy sector. These changes in the internal European market take place against the backdrop of an expanding European Union, increased dependency on imported fossil fuels and efforts to address environmental concerns;
2. The concerns raised in public debates about security of supply and a growing import dependency, not only for European Union member states but also for other major consumer regions. These concerns will influence the policy options and choices of both consumers and producers. The political and economic developments in, for instance, the United States, Russia, the Middle East, the Caspian Sea region, and Asia, are therefore important in assessing the developments in the European energy situation.

Mission

Through research, the publication of studies, information releases (particularly through the media and internet) and the organisation of courses and training programmes, CIEP makes a fundamental contribution to the public debate on international politics and economic developments in the energy sector (oil, gas and electricity).

Objectives

- To serve as an independent forum for governments, non-governmental organisations, the business community, politics, the academic world, the media and other stakeholders or interested parties.
- To gather and develop information and knowledge about international political and economic developments in the energy sector on the basis of research, supported by a documentation system.
- To propagate information and knowledge about international political and economic developments in the energy sector by means of seminars, conferences, lectures, courses, publications and information releases via the media.
- To initiate discussions about current events and future developments relevant to the energy sector, energy policy, legislation and the relationship between the government and the private sector.

Research and activities

CIEP's research and activities focus on two main subject areas:

- A. The regulation of energy markets (oil, gas and electricity) in the European Union.
- B. The international economic and geopolitical aspects of the oil and gas markets, mainly with respect to the security of oil and gas supply in the European Union, in the context of an increasing dependence on imported energy.
- C. Energy and sustainable development.

The staff of the Clingendael International Energy Programme, in combination with the staff of the Institute at large, develops courses and training programmes on the above-mentioned themes. CIEP-publications and research results are made available primarily through the CIEP website - www.clingendael.nl/ciep - part of the Clingendael website.