

Annual Report 2003

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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 sector, CIEP participates in and seeks to make a major contribution to the public debates on national and international developments in the energy sector.

The main reasons to initiate CIEP were:

1. The need for a platform to discuss developments in the European energy markets, e.g. the liberalisation of the European energy market which will impact the organisation and strategy of companies operating in the energy sector. These changes in the internal European market take place against the backdrop of an expanding European Union, an increasing dependency of imported fossil fuel and the efforts to address environmental concern.
2. The concerns raised in the public debate about the security of supply and a growing import dependency, not only in the European Union member states but also in 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 for the assessment of 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 have thus far focussed 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.

In the course of 2004, CIEP will start a third theme of research and activities in which energy, development issues and climate-related issues take centre stage.

- 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.

Participants

The programme is supported by the Dutch Ministry of Economic Affairs, Energie Beheer Nederland, Gasunie, ING Barings, NAM, NUON, Oranje-Nassau Groep, Petroplus International, Rotterdam Municipal Port Management, Shell Nederland, the Dutch Ministry of Housing, Spatial Planning and the Environment and Vopak Oil Logistics Europe & Middle East B.V.

Clingendael International Energy Programme (CIEP) in 2003

Introduction

In 2003, CIEP was strongly focused on its research and related publications. Two Clingendael Energy Publications were released. Both releases were marked by major activities. Furthermore, CIEP's natural gas study group has finished two papers, in addition to several draft papers that are to be released in 2004. Also on electricity CIEP staff has prepared draft papers. The biggest project was the study on geopolitics and security of energy supply for the European Commission. The official release of the report for the study for DGTREN of the European Commission is in January 2004 in Brussels. Although the study will be reworked into a Clingendael Energy Publication in 2004, the final report marks the closure of the general study into security of supply and the beginning of a more detailed focus on certain regions important for the security of supply of the European Union. In the second half of 2003 three projects were started, focused on Russia, Iran and North-East Asia, respectively. Another start was made with projects focused on energy and the environment with studies into geopolitics and climate change and innovation policies and technology. In 2004, energy and sustainable development will become CIEP's third research theme. 2003 was also the year that CIEP organised two pilot courses on international energy policies. On the organisational side, CIEP staff expanded further to fifteen people, including four fellows, a visiting senior researcher and four associate fellows. The latter work on a consultancy basis. In the second half of 2003, CIEP has started discussions with the twelve supporting institutions on the continuation of CIEP after the current project period (starting 1 January 2005).

Research

Most of the research in 2003 took place within the two main themes of CIEP research 'the regulation of energy markets (oil, gas and electricity) in the European Union' and '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'.

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

Gasstudy

CIEP research on international gas markets focussed in 2003 on the effects of liberalisation, in particular on long-term security of supply in EU gas markets. The key publication on this topic 'The case for gas is not self-fulfilling' (Clingendael Energy Paper) was published in January. This publication serves as a basis for follow-up publications in which specific aspects, which were only briefly analysed in 'The case for gas...' are assessed in more depth. Against the backdrop of a changing business environment in liberalising markets the second publication 'The future role of Liquefied Natural Gas (LNG) in European gas markets' analyses the dynamic developments around LNG trade.

CIEP also analysed the developments around the Dutch gas industry structure in the book 'Natural Gas in the Netherlands' (see below) as well as in an article in 'Energiewirtschaftliche Tagesfragen' (Die niederländische Energiewirtschaft im Umbruch). Another paper on medium term prospects of supply for European markets makes an inventory of possible gas supply sources for the EU and gives an overview of technical and economic problems which might form obstacles for the successful realisation of supplies from these sources. At the end of 2003 the draft is in an advanced stage and the paper will be published early 2004.

Upcoming papers in the framework of the gas research project will treat the role of the transmission system operator in liberalised gas markets and price formation in liberalised gas markets.

In co-operation with the Oxford Institute for Energy Studies, CIEP is developing a paper on the investment climate in global gas markets and the question what governments ought to do in order to facilitate a smooth development of natural gas sources and infrastructure. This paper is being written for the International Energy Forum, May 2004.

The research undertaken for the gas research project is facilitated by regular meetings of the gas study group consisting of Coby van der Linde, Dick de Jong, Jacques de Jong, Aad Correljé, Theo Westerwoudt, Christoph Tönjes, Wim Groenendijk (NAM), Henk Krijnen (NAM), René Snijder (Gasunie) and Bert Roukens (Ministry of Economic Affairs). During these meetings the research projects and draft papers as well as relevant developments in international gas markets are discussed.

Important contacts were developed in 2003 with among others the Market Surveillance Committee of Dte and Eurelectric (both on the relation between gas and electricity markets).

Natural Gas in the Netherlands

On 21 May 2003, the book "Natural Gas in the Netherlands; From Cooperation to Competition?" was published to mark the 25th anniversary of Oranje-Nassau Groep's (ONG) natural gas production in The Netherlands. The book was written by Coby van der Linde Aad Correljé and Theo Westerwoudt. In eight chapters they sketch in detail the history, development and radical changes of the Dutch gas system. From coal mining to the very first discovery of natural gas in 1948, the giant Groningen field in 1959 and the hundreds of smaller fields, from the gas distribution, the gas exports and the Dutch contribution to a European gas market and the fascinating impact on the national economy, the book is a guide through Dutch energy policy. Interviews with experts from the gas sector, and with politicians, former ministers, civil servants and bankers illuminate many issues further. The book was received a positive welcome.

Electricity Study

2003 was a year of difficulties in electricity supply systems around the world. Large-scale blackouts occurred among others in the United States, the United Kingdom, Sweden and Italy. A very warm summer in Europe caused problems with sufficient cooling water for power plants and thus reduced safety margins. Although the issue of security of supply was already receiving more and more attention, these events accelerated the discussion and raised additional concerns about the effect of market liberalisation.

CIEP accompanied these developments with own research that resulted in two short articles in the CIEP 'Current Affairs' Series in which the often-stipulated link between liberalisation and low reliability of electricity supply systems is challenged.

Moreover a paper on experiences with regional markets in the United States and their relevance for European markets has been drafted and will be published in 2004.

Dutch Energy Policy 1973-2003

In 2003, work commenced on a study into the Dutch Energy Policy in the 1973 to 2003, which will be published in 2004. In 2003, research has been done in the archives of the

Ministry of Economic Affairs, as well as an analysis of all the official documents concerning energy policy. Furthermore, a number of interviews have been conducted with (former) policy makers, who played a key role in the formation of the policy. The book will be published in Dutch.

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

Study on Energy Supply Security and Geopolitics

Several members of the CIEP-staff – Coby van der Linde (project manager), Mehdi Amineh, Aad Correljé, Dick de Jong and Sander Hansen - have worked on a study for DGTREN, European Commission called *Study on Energy Supply Security and Geopolitics*. The terms of reference of the study mentioned a broad range of topics that had to feature in the study¹. The draft report that was presented covered many of these aspects but at a varying degree of depth. The main focus of the study was on the development of two storylines for 2020 ("Markets and Institutions", a mainly multilateral approach to the world and "Regions and Empires", a predominantly bi- and unilateral approach to the world) and the impact of these storylines on the security of supply in oil and gas. The study also looked at the efficiency of energy policy tools (prevention, deterrence, containment and crisis management) under the two storylines. In a worst case the loss of production from Russia and Algeria for gas and for oil the loss of some major suppliers in the Persian Gulf were considered. The study will be presented in Brussels in January 2004. The study is predominantly focussed on policy-making at the EU level, on the identification of main risks and attempt to avert these risks by policy proposals, for instance on co-operation with producer and consumer countries.

Russia

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, an institute that is part of Moscow State University and linked to the Ministry of Foreign Affairs, CIEP has started a research project that will be finished in 2005.

Under CIEP supervision a paper on the attractiveness of the Russian oil sector for foreign investment has been written by Erik Janssen, which will be published early 2004.

OPEC/ Oil/ Iraq/ Iran

Some research has been done by CIEP in 2003 on the potential role of Iraq in world oil markets against the backdrop of recent developments. Coby van der Linde wrote a chapter: "The geopolitics of oil: Is Iraq a 'game changer?'" for the jubilee book "Canons and Cannons of the Clingendael Institute.

¹ The relation between energy security and worldwide geopolitical aspects; international cooperation of the EU with other nations and economic blocks; effects of the EU enlargement; implications of the Euro; investment for hydrocarbon exploration and production in the producing countries (investment climate); energy geopolitics and the environment; the interaction between globalisation, liberalisation and geopolitical developments; impact of terrorism on sensitive areas and infrastructures and impact of energy price shocks on the EU economy. The study had to be concluded by a scenario exercise (i.e. developing the geopolitical storylines; the scenario will be developed by JTR in Spain) in which the different elements are brought together in a worst case and most likely case.

Strategic oil reserves

In September 2002 the European Commission launched a proposal for strengthening European security of oil supplies. Key points of this proposal were the stronger harmonisation of strategic oil stock systems across Member States, the increase of compulsory strategic oil stock levels and the intention to use strategic oil stocks also to dampen oil price fluctuations, rather than only in situations of actual physical supply shortfalls. CIEP took these proposals and the turbulent circumstances in world oil markets in 2002/2003 as an occasion to review the existing strategic oil stock systems of the IEA and the European Union as well as the new Commission proposals. The paper will be published early 2004.

Caspian Sea

In the littoral states of the Caspian Sea a lot of efforts are undertaken to develop the regional oil and gas resources. For world oil and gas markets these developments are not only interesting since the resources add significantly to the resource base available to the market, but also since the emerging supply regions offers opportunities for states and companies to diversify supply sources. Many issues prevail which could hamper the development of the regional resources. To name a few: the legal status of the Caspian Sea (distribution of area among littoral states) is unclear, transportation of the resources to world markets is expensive or faces political constraints and the political circumstances in the regio are rough at times, adding to an uncertain investment climate. CIEP assessed these developments with two major publications in 2003: The Clingendael Energy Publication: "Globalisation, Geopolitics and Energy Security in Central Eurasia and the Caspian Region." by Mehdi P. Amineh and the Clingendael Energy Paper "Pipeline politics: the struggle for control of the Eurasian energy resources." by Sander Hansen.

Other research projects

Geopolitical and energy dimension of the climate change debate

In 2003, a research project was started into international relations and the start of the negotiations for a follow-up of the Kyoto-protocol in 2005. On the one hand the project will analyse the changing international political climate and its consequences for Kyoto and future treaties. On the other hand, it will look at the geopolitical changes brought about by Kyoto and other climate changes policies.

Transition, innovation and technology

Under the pressure of environmental policies, the expected finality of fossil fuels reserves - although at least still several decades away - and increasing security of supply concerns has fueled the debate on the world's future energy systems. It is clear that a complete sustainable system is out of reach for the moment due to the current technology level. A period of transition is inevitable. But how long will the transition phase be? What are the technologies to be used during transition? What are the policy options for governments? And, transition to what...? A multi-year research project was started in 2003, addressing these questions.

Bolivia

Since a meeting held late 2001, CIEP has been asked first by the Embassy of the Netherlands in La Paz and later by UNCTAD to advise the Bolivian government on developing their natural gas reserves. In 2003 a couple of meetings took place in this regard.

Activities

CIEP organised several activities in 2003, mostly directly linked to research.

Conferences

Geopolitics and energy security; an overview of recent developments, 19 June 2003

On 19 June 2003, CIEP organised the conference Geopolitics and Energy Security; an Overview of Recent Developments at the Clingendael Institute. During the conference CIEP presented the new Clingendael Energy Publication: "Globalisation, Geopolitics and Energy Security in Central Eurasia and the Caspian Region" written by dr Mehdi Amineh. A short summary of the conference and the presentations of the three main speakers are available on the CIEP website.

Lectures

The global energy outlook for the 21st Century; by Peter R. Odell, Professor Emeritus of International Energy Studies at Erasmus University Rotterdam, 21 May 2003

In an event organised by the Dutch Association for oil and gas producers (NOGEP) and Oranje-Nassau Groep (ONG) together with CIEP to mark the release of "Natural Gas in the Netherlands; from Cooperation to Competition?" Peter Odell gave a lecture on the global energy outlook for the 21st century and the expected growing role for natural gas.

Seminars

The future of the European gas market, 17 March 2003

CIEP launched its publication 'The case for gas is not self-fulfilling!' in a seminar on 17 March. Major topic of the seminar was the substantial changes in European gas markets as a result of the liberalisation process. Selected speakers gave their opinion on the CIEP publication. Jonathan Stern chaired the subsequent lively discussion on the changing business environment. Among the invitees were senior officials of companies from the European gas industry, the European electricity industry, the Dutch government and the European Commission.

War with Iraq, 25 March 2003

In a seminar jointly organised with the Department of Training of the Clingendael Institute many aspects and dimensions of the war with Iraq were addressed. Keynote speaker was Professor van der Linde, who gave a lecture on the war and the role of oil.

Meeting the challenges of an internal electricity market, 16 June 2003

The liberalisation of European electricity markets has been accelerated by the adoption of the new EU directive on common rules for the internal electricity market. However, it is widely acknowledged that still many efforts lie ahead to reap the benefits of liberal and integrated electricity markets. The European Commission drafted a strategy paper on a medium term vision for the internal electricity market, addressing remaining problems and possible steps to solve them. In the seminar on 16 June the Commission presented this strategy paper. The second keynote speaker, Prof. dr. Ignacio Pérez-Arriaga addressed more specifically the problem of adequate pricing of transmission services; an issue that is seen as one of the keys to integrating markets and ensuring high levels of security of supply. The seminar concluded with an extensive discussion of the foregoing presentations with the audience. The discussion was chaired by Peter Vogtländer, chairman of the Dutch General Energy Council (Algemene Energieraad). Participants included representatives of industry, the Dutch government, regulatory authorities, the scientific community as well as international electricity organisations. Documentation of this seminar is available via the CIEP website.

The future role of LNG in European natural gas markets, 21 October 2003

Declining indigenous gas production and expected increasing demand necessitate strongly increased natural gas imports to the European Union over the next decades. Trade in liquefied natural gas (LNG) is expected to play a much stronger role in EU supplies in the future than before. On basis of the Clingendael Energy Paper on this topic participants in the seminar reviewed current developments regarding LNG and assessed the perspectives for the future. Distinguished international experts provided valuable input. Participants included representatives of CIEP supporting companies and ministries as well as representatives of the international gas industry. CIEP received remarkable attention for this seminar and requests for participation. The number of participants deliberately was kept very restricted in order to facilitate the discussion. Documentation of this seminar is available via the CIEP website.

Other activities

Council on Oil and Gas (Overlegraad Olie en Gas; OOG)

In 2003 CIEP acted as the secretariat of the Council on Oil and Gas. In addition to the organisation of the general meetings of the Council, CIEP was active in the correspondence of the Councils' findings towards Dutch politicians.

International Energy Business Forum

From 22 to 24 May 2004 the International Energy Forum (IEF) - the global energy producer-consumer dialogue - will take place in Amsterdam, The Netherlands. For the first time in the twelve year history of this ministerial dialogue a back to back meeting with the industry - the IEBF - is organised. Its purpose is to enable invited CEOs of leading international companies to discuss certain key elements of the IEF agenda with ministers and representatives of international organisations. The IEBF - chaired by Peter Sutherland, Chairman of British Petroleum Plc and of Goldman Sachs International - precedes the opening session of the IEF and will take place in the morning of 22 May 2004 at the same venue.

Upon special request of H.E. Laurens Jan Brinkhorst, Minister of Economic Affairs of The Netherlands and official host to the IEF, the International Energy Business Forum is organised by the Clingendael International Energy Programme (CIEP). Work on the IEBF started in August 2003.

World Energy Council Netherlands

Coby van der Linde is the vice-president of the World Energy Council Netherlands. CIEP is actively involved in WEC Netherlands, amongst others in the organisation of seminars.

*WEC-NL workshop 'Global developments and solutions around climate change issues',
23 September 2003*

CIEP, together with ECN and RIVM, was strongly involved in the organisation of the workshop on climate change issues under the auspices of the Netherlands Committee of the World Energy Council. WEC-NL workshops target young professionals from the Dutch energy sector. In this workshop the international dimension of climate change, the necessity of international co-operation and the problems to achieve such a co-operation effectively were discussed in depth. The chosen structure with different working groups facilitated high involvement and participation. Documentation is available at the website www.climatepolicy.info, managed by ECN.

Cancelled Activities

Clingendael Energy Lecture by H.E. mr. Zangeneh, Minister of Petroleum of the Islamic Republic of Iran

A lecture of H.E. Mr. Zangeneh was scheduled twice this year. Unfortunately Mr. Zangeneh had to cancel his visit to the Clingendael Institute both times. In early 2003, the immediate threat of a war in Iraq made a visit to the Institute unsuitable. In December, other appointments overruled an already scheduled lecture.

New stakeholders seminar

In this seminar, scheduled for 30 June 2003, CIEP wanted to discuss the implications of the emergence of other stakeholders in international energy markets, with a particular focus on investment decisions and security of supply issues. One of the goals of the seminar was to organise a forum in which presenters and participants could discuss and share their different experiences and insights regarding the changing relationship between the energy industry and the broader community. Due to conflicting time schedules of both speakers and participants the seminar was cancelled and a new date could not be set.

Training Programmes

CIEP Pilot courses

When CIEP was established in 2001 the intention has been explicitly expressed to organise an energy course of its own, on top of the training already incorporated in third party courses. In order to learn how CIEP might execute this intention, a training needs assessment has been carried out amongst CIEP's partners. Although, as can be expected, training needs differ, by the end of 2002 CIEP proposed a pilot course based on the interviews with the twelve sponsors. It was agreed that CIEP would organise two pilot energy courses in 2003 and, after evaluation of the two, would decide what CIEP can and should offer in terms of future training and education.

The first pilot course – bearing the title *Energy Strategy Course* – has taken place in the months of April and May 2003. The second – bearing the title *Dilemmas and Choices in (Inter)National Energy* – has taken place in the month of November. The external objectives that have been formulated are that after having followed the course, participants have expanded their knowledge on the public and private, national and international, political and economic context of the energy sector. Secondly, they gained insight into the dynamics and interdependencies in the energy sector and the policymaking on the subject. Finally, they have developed an analytical framework based on which they are better equipped to place recent developments and gather and interpret relevant information as a base for the development of a strategy for their own organisation.

Looking at both the oral and electronic evaluations held among participants during and at the end of the courses, it can be concluded that to a large extent the objectives of the course have been met. The same is true for the internal objectives of the project team. CIEP now has a clear picture of what it can deliver, in terms of education, for both its partners and for third parties. CIEP can successfully organise its own courses, has enough staff to educate future participants and needs to hire external knowledge on highly specialised energy related subjects only.

For more information, see the final report on the first pilot. The final report on the second pilot is forthcoming.

Gas Strategy Course

CIEP staff members Coby van der Linde, Dick de Jong, Jacques de Jong and Theo Postma have contributed various lectures to the 'Gas Strategy Courses' organised by the Energy Delta Institute (EDI) in Groningen. Co-operation with the EDI will intensify in the future.

Others

All CIEP staff members gave various presentations and lectures as representatives of CIEP

Knowledge Centre

Offering public information is a very important task of CIEP. Virtually all CIEP activities in some way contributed to the fulfilment of this task. Almost all research was made publicly available with a substantial part of it available as downloads from the CIEP website. Seminars and lectures directly targeted the relevant audience and documentation for most of the events is also available on the website. The CIEP Current Affairs Series has been developed to provide short, quick up-to-date information for a broad audience. This instrument will be improved and further developed in 2004.

The role of CIEP as a knowledge centre is also carried out by CIEP staff providing lectures and presentations for specific groups as well as by CIEP staff commenting on developments in Dutch and European energy policy in for example the media.

Network

CIEP aims to be a network organisation. CIEP has numerous contacts in the Netherlands and abroad. Co-operation with the supporting organisations of CIEP was continued in 2003. Involvement of CIEP in network organisations such as WEC Netherlands, the Council of Oil and Gas and the Dutch General Council on Energy (Algemene Energieraad) has further broadened CIEP contacts. Internationally CIEP deepened her contacts with DGTREN (European Commission) and the International Energy Agency (IEA). With Russian and Iranian counterparts (MGIMO and IPIS respectively) future plans for co-operation were set up. The first tangible result of this co-operation is expected in the course of 2004.

Internal Organisation

The current project period of CIEP runs until 1 January 2005. In 2003, CIEP has been in negotiations with her supporting institutions about prolongation of the programme. At the end of the year nine of the twelve institutions had indicated the wish to continue the programme for a second period. The length of this period and possible organisational changes of CIEP are part of the discussion of the future of CIEP.

In 2003, the regular staff of CIEP expanded with three members.

Publications

Clingendael Energy Publications

- Aad Correljé, Coby van der Linde and Theo Westerwoudt: “Natural Gas in the Netherlands. From Cooperation to Competition?” Oranje-Nassau Groep B.V.. 240p.
- Mehdi Parvizi Amineh: “Globalisation, Geopolitics and Energy Security in Central Eurasia and the Caspian Region.” CIEP 04/2003. 260p.

Clingendael Energy Papers

- CIEP: “The case for gas is not self-fulfilling!” CIEP 01/2003. 22p.
- Sander Hansen: “Pipeline politics: the struggle for control of the Eurasian energy resources.” CIEP 02/2003. 83 p.
- CIEP: “The role of Liquefied Natural Gas (LNG) in European gas markets.” CIEP 03/2003. 29p.

CIEP Current Affairs:

- Theo Westerwoudt: EU Policy on improving the security of oil and natural gas supplies. *CIEP Current Affairs* 1, May 2003.
- Theo Westerwoudt: Natural Gas in the Netherlands: From Co-operation to competition? *CIEP Current Affairs* 2, May 2003.
- Christoph Tönjes: Electricity markets – time to worry? *CIEP Current Affairs* 3, July 2003.
- Christoph Tönjes: Security of electricity supply reaches beyond new power plants. *CIEP Current Affairs* 4, November 2003.

Other publications:

CIEP staff published a total of 12 papers/ articles in several scientific- and energy journals and in newspapers.

Lectures, Speeches and Presentations

In 2003 CIEP staff members gave a total of 67 lectures, speeches and presentations during training courses, conferences and seminars.

Media

CIEP staff members gave 53 interviews for radio, television and newspapers.

Website

The CIEP website had 11157 visitors, who downloaded the different documents 12297 times.

Contactgroep (Contact Group)

The CIEP Contact group convened on 18 February, 6 June, 4 November and 20 November.

Adviesraad (Advisory Board)

The CIEP Advisory board convened on 25 June and on 18 December.

Staff

On 31 December 2003 CIEP staff existed of the following people:

- Dr. Mehdi Amineh, associate fellow (consultancy basis)
- Rowena Cantley Smith, LL.M, associate fellow (consultancy basis)
- Dr. Aad Correljé, associate fellow (0,2 fte) (seconded TU Delft)
- Lucia van Geuns, MSc, associate fellow (consultancy basis)
- Sander Hansen, MA LL.M, researcher (1,0 fte)
- Femke Hoogeveen, MA, training officer (1,0 fte)
- Dick de Jong, MSc, fellow (0,2 fte)
- Jacques de Jong, MA, fellow (0,4 fte) (seconded Ministry of Economic Affairs)
- Michèle Irish'Stephenson (0,6 fte), office manager
- Prof. dr. Coby van der Linde, director (0,8 fte)
- Wilbur Perlot, MSc, researcher/ office manager (1,0 fte)
- Prof. dr. Kurt Radtke, visiting senior researcher (sabbatical leave from the Institute of Asia-Pacific Studies of the Waseda University, Tokyo)
- Christoph Tönjes, MSc, researcher (1,0 fte)
- Theo Westerwoudt, fellow (0,2 fte)