

**Clingendael International Energy Programme**

# **Annual Report 2006**



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### **Clingendael International Energy Programme**

CIEP is affiliated to the Netherlands Institute of International Relations, 'Clingendael'. CIEP acts as an independent forum for governments, non-governmental organisations, the private sector, media, politicians and all others interested in the changes and developments within the energy sector.

CIEP organises lectures, seminars, conferences and roundtable discussions. In addition, CIEP members of staff lecture in a variety of courses and training programmes. CIEP's research, training and activities focus on three themes:

- the regulation of energy markets (oil, gas, electricity) in the European Union;
- the international economic and geopolitical aspects of oil and gas markets, particularly with respect to the European Union's security of supply; and
- energy and sustainable development.

CIEP is endorsed by BP, the Dutch Ministry of Economic Affairs, Eneco, Energie Beheer Nederland, Essent, the Dutch Ministry of Foreign Affairs, GasTerra, Nederlandse Gasunie, ING, NAM, NUON, Oranje-Nassau Groep, Port of Rotterdam, Shell Nederland, Total E&P Nederland, the Dutch Ministry of Housing, Spatial Planning and the Environment, Vopak Oil Europe Middle East and Wintershall.

CIEP publications and research results are made available primarily through CIEP's website: [www.clingendael.nl/ciep](http://www.clingendael.nl/ciep).

CIEP Annual Report 2006  
English Editing : Deborah Sherwood  
Address: : Clingendael 7, 2597 VH The Hague, The Netherlands  
P.O. Box 93080, 2509 AB The Hague, The Netherlands  
Telephone : +31 70 374 66 16  
Telefax : +31 70 374 66 88  
E-mail : [ciep@clingendael.nl](mailto:ciep@clingendael.nl)



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For a list of abbreviations of contact organisations, see the section ‘CIEP network’ on page 10.



## **Clingendael International Energy Programme (CIEP) in 2006**

### **Introduction**

The year 2006 opened with the gas conflict between Russia and Ukraine and, as a result, energy continued to dominate political agendas worldwide. Energy security and the environment currently feature prominently on the agenda of the G-8. In the EU, the gas crisis intensified the debate about the proposals concerning EU energy policy. The intensified debate, at both the political and institutional levels, about energy security risks and instruments also impacted the level and type of involvement by CIEP staff in these discussions. The reorganisation of the energy sector in Russia and the ongoing discussions between Russia and the EU on energy relations and market organisation featured prominently on CIEP's agenda. The emergence of China as a major energy consumer and the impact of this on international energy market structures was another major theme in 2006. Throughout 2006 the ongoing work on CIEP's geopolitical scenarios and energy relations was a helpful contribution to these debates.

Being among the prominent institutes in Europe that study energy matters and international relations, demand for CIEP's expertise is growing. Representatives of other European countries often 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, 2006 was in many ways a harvest year. Triggered by geopolitical developments, CIEP had taken the Study of Geopolitics and Energy Supply Security conducted for DGTREN in 2003-4 back to the drawing board in 2005, focusing on possible futures for the international system and their consequences for energy policy. The new study was finished in late 2005 and the results of this extensive research and brainstorming can be found in several 2006 publications. The analytical framework was not only used for energy security research, but was also used in research into international cooperation on sustainability issues and while looking at consequences for the liberalisation of energy markets.

For the IGU world gas conference held in June 2006, CIEP conducted two special international projects, one on 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 importance of intense cooperation with various stakeholders in the energy sector in discussion groups continues to grow. The various research results were both developed and discussed in the various brainstorm groups. The brainstorm groups bring together academic, policy and business knowledge and were instrumental in setting 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 2006 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; and
- C. Energy and sustainable development.

### Theme A – The regulation of energy markets (gas and electricity) in the European Union

2006 was a very interesting year for the European energy sector. Right at the beginning, the dispute between Russia and Ukraine and the accompanying gas supply problems for the European Union focused extra attention on energy policy and the organisation of markets. Consolidation activity in European energy was very strong, with the intended mergers of E.ON-Endesa or Gas Natural-Endesa and Suez-GdF dominating the headlines. The preliminary findings of the EU sector inquiry were published in February, claiming substantial shortcomings in the proper functioning of the internal European gas and electricity markets. In a lead-up to what was about to become the Strategic Energy Review 2007, the European Commission published the Green Paper *A European Strategy for Sustainable, Competitive and Secure Energy* in March. The focus of the debate continued in 2006 to shift towards security of supply, and liberalisation approaches were reviewed. As one energy expert put it: “Liberalisation solves yesterday’s problems. It is time for a shift of policy focus”.

#### *Natural gas*

CIEP has been a very active player in the debates on energy policy. Particular attention was paid to gas markets in various events throughout the year. In February, government officials and sector experts discussed recent developments in world LNG markets with particular relevance to European gas markets. In November, CIEP organised an expert workshop on the future of Dutch gas exploration and production. Detailed documentation of these events can be found on CIEP’s website.

A very prominent research project in the field of gas market regulation was the work conducted for the International Gas Union in preparation of the World Gas Conference in Amsterdam in June 2006. The project included organising two workshops, together with the IGU: one given in cooperation with the IEA in Paris in January, and one in Kuala Lumpur in April given in cooperation with Petronas. The Paris workshop took a look at changes in world energy markets and their impacts on regulatory models in general, while the Kuala Lumpur workshop dealt with the regulatory requirements in Asian gas markets. Results of the workshops were incorporated in CIEP’s study ‘The paradigm change in international natural gas markets and the impact on regulation’, which was eventually presented during a high level Strategic Panel at the World Gas Conference in Amsterdam on 8 June 2006. The study was very well received, and CIEP will deepen the research on the regulation of natural gas markets in 2007, building upon the findings of the IGU study and in constant dialogue with academics, government representatives and the energy sector. The IGU has indicated that it would be interested in further supporting CIEP in the field of energy regulation research.

The panel discussion on ‘Gas to Power in Europe’ at the World Gas Conference was based upon an updated version of the CIEP study with the same title. CIEP also authored the *Gas to*

*Power – a Global Summary*, which served as background discussion for the ‘Strategic Panel on Gas to Power’. Studies, discussion notes and workshop reports that were prepared by CIEP within projects conducted for the IGU can be found on CIEP’s and IGU’s websites.

All research and activities of CIEP were supported in 2006 by regular meetings of CIEP’s Gas Group. This group of experts from CIEP’s supporting institutions currently has twenty regular members. The group serves as initiator and review organ for CIEP’s work related to natural gas markets and facilitates the exchange of information and views between the experts involved. Apart from the work described earlier in this document, the discussion about the European Commission’s Green Paper was very significant in the Gas Group meetings, particularly where it concerned the relationship between internal and external EU energy policy. CIEP submitted a contribution to the public consultation process of the European Commission and submitted an opinion at an expert hearing at the European Parliament in the session ‘What is missing in the Green Paper?’ (12 September 2006). Working groups were formed in the Gas Group and embarked on the following topics: a) the pricing of natural gas in Continental Europe; b) barriers to investment in seasonal storage and c) the future of gas exploration and production in The Netherlands. Publication of papers about these topics will be forthcoming in the first half of 2007.

### *Electricity*

CIEP followed the developments in European electricity markets and organised several events in which topical issues were discussed. Against the backdrop of the increasingly louder discussions about the benefits of nuclear power, a one-day conference in January was dedicated to the future of nuclear energy within the European market. This conference featured high-level representatives of the nuclear industry and supranational organisations, complemented by policy makers. Participants received detailed information about fuel cycle issues, economics and wider policy issues surrounding nuclear energy. In June CIEP organised a symposium, together with the ‘*Bezinningsgroep Energie*’ and environmental consultancy CE, which looked at current investment plans for the Dutch power generation sector. In preparation for this discussion, CIEP had examined in a report to what extent European developments influence the investment plans for The Netherlands.

Also in 2006, CIEP organised regular meetings of the CIEP Electricity Group. This discussion group consisting of experts from CIEP’s supporting organisations and academics meets regularly to discuss relevant developments in European electricity markets. Meetings were organised as mini-workshops, in which external experts introduced certain topics that were then discussed intensively in a small, highly involved group. An overview of topics and speakers can be found below.

<b>Date</b>	<b>Topic</b>	<b>Speaker(s)</b>
27 February	The European ETS from a United States perspective	Prof. Denny Ellerman, Senior Lecturer at the Massachusetts Institute of Technology
25 April	Monitoring competition in electricity markets	Jan de Maa, Senior Expert of the Dutch Competition Authority NMa.
18 September	Distributed Generation	Hans Overdiep, Gasunie Trade and Supply Peter Aubert, Ministry of Economic Affairs Kees Tromp, Westland Energie
7 December	Progress in creating the Northwest European Electricity Market	Lineke den Ouden, Policy Advisor at the Dutch Ministry of Economic Affairs

#### *Activities without specific gas or electricity focus*

CIEP facilitated the discussion on policies regarding the organisation of gas and electricity markets with three more events that had no specific gas or electricity focus. In March the Dutch Minister of Economic Affairs, Mr. L.J. Brinkhorst, presented his view of the challenges in formulating today's energy policy during a Clingendael Energy Lecture before a distinguished audience from public and private organisations involved in energy matters. In October CIEP hosted a debate between Dutch politicians on energy policy in the lead-up to the Dutch general elections held in November. CIEP provided a thorough comparison of the various election programmes of the various political parties with respect to energy policy issues, given in preparation for the debate. On 5 December, CIEP hosted the Clingendael Energy Lunch in Brussels featuring Rosneft's CEO, Mr. Bogdanchikov. Also in December, the influential British energy expert Dieter Helm lectured on European energy policy and the necessary adaptations to it in a Clingendael Energy Lecture on 12 December 2006.

#### *Liberalising Dutch energy markets*

Building upon the 2005 CIEP publication *Dertig Jaar Nederlands Energiebeleid*, a separate paper was published in English describing the 1995-2005 period of liberalisation in the Dutch energy markets.

### **Theme 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**

As mentioned before, the gas crisis between Russia and Ukraine has brought security of gas supply issues to the fore. Two articles and various lectures were devoted to this theme. The relationship with Russia featured high on the research agenda in 2006.

Another major theme was that of the issues raised in the March 2006 Green Paper of the European Commission, where an attempt was made to develop an external energy policy for the EU. In September CIEP published a consultation paper on the Green Paper in which a value chain approach was advocated and it was argued that gas and electricity should not be treated the same in a regulatory approach. Based on this work, a contribution was prepared for the Bruegel Institute (Brussels) on EU energy policy-making. In this contribution the possibilities for an EU energy policy were explored against the backdrop of what role states play in energy markets and in how far business-to-business relies on government-to-government relations. This article attempted to determine what 'product' the state can deliver and how the European Union, not being a state, will be able or unable to play such a role. This is important in determining the scope of a European energy policy. If the EU lacks the tools of a state, the energy industry will continue to rely on the member states for such services.

CIEP continued to work on Asian energy topics. In January 2006 a new CIEP staff member was appointed who will focus mainly on energy issues related to greater China (see also the Clingendael Asia Studies section of this report).

#### *A model for EU Standards on Energy Supply Security*

Partly based on a separately funded project by the MEA, where CIEP and ECN worked together, CIEP was active in the ongoing preparatory debates on EU energy supply security.



January saw a well-attended seminar in Brussels where energy supply security was discussed in a broader context, including the idea of developing EU standards. In June 2006 a joint CIEP-ECN paper was published on standards for security of supply. The idea for this paper originated in the 2004 'Energy security of supply and geopolitics' study for DGTREN. This paper tried to argue why the Commission should move away from the fuel-by-fuel approach in security of supply matters. In a seminar, the quantitative model was described, and some preliminary quantitative exercises demonstrated how it worked. The model was also presented to DGTREN in July, and a specialised workshop was held in November. CIEP and ECN will continue in 2007 to further elaborate their model, to broaden the quantitative basis and to further demonstrate possible applications.

#### *Relations with Russia*

Upon request from the Ministry of Economic Affairs' International Economic Relations department, a project was started for the exploration and assessment of economic relations with Russia, with a special focus on energy. Based on a strategic discussion paper, a closed seminar was held with a number of invited Dutch stakeholders from government, industry and academia. The project will continue into 2007, where a second and more international seminar will be held. CIEP intends to issue a public paper on the Russian relations in the course of 2007.

#### *CSD project*

In a project commissioned by the Ministry of Foreign Affairs' Development department, CIEP drafted a number of discussions papers as input for the forthcoming sessions on energy, environment and development by the UN's Commission on Sustainable Development. Papers were drafted on subjects such as global and regional energy issues, sources of energy technology, and lessons from Dutch energy and energy transition policies. The papers were discussed in a workshop with the CSD delegation. CIEP intends to finalise the papers in a 2007 publication.

#### *Nuclear Energy*

CIEP's attention is also moving carefully in the direction of the re-emerging debate on nuclear energy. In January a widely participated seminar was organised, discussing the EU content of the forthcoming debate. On the basis of a number of high-level presentations, issues were discussed around market models, the back end of the fuel cycle and non-proliferation of the sensitive fuel cycle technologies. In addition, CIEP issued a study on uranium mining at the request of VROM. The report investigated the uranium market, in particular regarding reserves of uranium and environmental consequences of uranium mining (see also Theme C).

#### *Reserves project*

In co-operation with the Technical University of Delft (TBM department), CIEP continued a research project that focuses on databases and statistics on oil reserves. The topical discussion of proven, possible and probable reserves were analysed within a broader context, taking into account technical, (socio-)economic, institutional and (geo)political dimensions. In 2006, one student finalised his thesis work on crude oil demand as a function of refinery complexity and product market change. This thesis will be issued as a CIEP Energy Paper in 2007.

At the request of viWTA (Vlaams Instituut voor Wetenschappelijk en Technologisch Aspectenonderzoek), an institute liaised with the Flemish Parliament, CIEP and CE Delft executed a project on resources/reserves of primary energy sources (coal, oil, natural gas,

uranium), their availability, upstream activities, upcoming technologies, etc. in the context of security of supply. Emphasis is on the reliability of the data sources (an upstream focus). The final report is planned to be ready in early 2007.

### Theme C - Energy and sustainable development

Activities related to Theme C in 2006 consisted of three main elements: meetings of CIEP's Sustainability Discussion Group, organisation of seminars around technologies that are likely to play a role in replacing or cleaning use of the present fossil fuels in CIEP's 'Future Fuels' seminar series and research projects supporting the objectives of Theme C.

In 2006, five meetings of the sustainability group took place, as well as two combined meetings of the Sustainability Group and Electricity Group. On average, the meetings of the Sustainability Group were attended by about ten participants. The group consisted of external parties as well as CIEP staff members. Themes varied from a briefing of results of the Montreal climate change conference to practical experiences and multilateral frameworks for access to energy.

Date	Topic	Speakers
February 15	Results Montreal Climate Change Conference (COP-11 + COP/MOP-1)	Barbera van der Hoek (WWF), CIEP (the American Position)
April 10	Support for renewable energy in Europe	André Wakker (ECN), Alexander Savelkoul (Essent)
August 29	CO <sub>2</sub> trading – The facts	Coos Battjes (NUON)
October 16	Access to energy: which multilateral framework?	Mayra Ortega Maldonado (Philips Lighting), Frank van der Vleuten (ETC Leusden)
December 14	Energy Innovation – Key to a low-carbon energy sector?	Jos Cozijnsen (Consulting Attorney Energy & Environment), Stephan Slingerland (CIEP)

Two meetings were organised together with the Electricity Group, as the themes concerned were of interest to members from both groups. These themes concerned an American view on the European Emission Trading Scheme, as well as an outline of distributed generation activities and technologies. Following the 2005 Future Fuels seminars on Gas to Liquid technology and on Biofuels, in 2006 two more seminars in this series were organised. Both events featured a variety of speakers from business, policy and non-governmental organisations and were attended by some 50 participants.

January 24: Nuclear Energy and EU Energy Policy

May 16: The Return of King Coal: New Perspectives for Coal as a Clean Energy Source?

#### *Research Projects*

Four externally financed research projects were carried out in the context of Theme C in 2006. These projects covered a wide range of subjects.

One project ('CSD Papers') provided a background to the Dutch delegation visiting the Conference on Sustainable Development in May 2006. Six short briefing papers on international energy issues were written, followed by a preparatory workshop for the

delegation. In another project ('SMOM Project'), a briefing paper on trends in the European electricity market and their consequences for investments The Netherlands was written. In this project, together with CE Delft, a conference was organised discussing issues arising around investments in generation capacity in The Netherlands. A report written in a third project ('Uranium project') served as one of the underlying documents for a letter written by the Minister of Environment to the Dutch Parliament. The report investigated the uranium market, in particular regarding reserves of uranium and environmental consequences of uranium mining.

The fourth project investigated possibilities for the Dutch Department for Energy Transition to cooperate on a strategic level with other EU member states aiming to be front runners in energy innovation.

### *Research Projects*

Title	Time frame
CSD Project	Jan – May 2006
SMOM project	Jan – June 2006
Uranium project	May – Oct 2006
Coalitions for Energy Innovation project	May – Dec 2006

Apart from the main research lines, some miscellaneous activities took place within the context of Theme C. Together with the Dutch Section of the World Energy Council, workshops were organised on 26 April and 6 November for young energy professionals on the topics of mobility and energy efficiency. On November 14, an informal lunch meeting was organised on Post-Kyoto. The theme was what policy options would exist for The Netherlands if it would not be possible to achieve a new agreement succeeding the present Kyoto agreement. The event was generally positively received by its ten participants. Finally, within Theme C an MSc thesis on biofuels was supervised, which was defended successfully by its author at Groningen University.

### **CIEP seminar on energy and the 2006 Dutch parliamentary elections**

Building upon the tradition started in 2002, a seminar was organised where MPs and discussants analysed the energy paragraphs of the election programmes of major political parties. As input to this debate, CIEP made an analytical overview of the programmes.

### **Clingendael Asia Studies**

In 2006 the Clingendael Institute launched a three-year project on Asia, financed by the Dutch Ministry of Foreign Affairs. This project aims at promoting academic and public discussion on various topics, such as the East Asian political economy, security issues and energy-related matters.

All programmes of the Clingendael Institute participate with sub-projects in the Clingendael Asia Studies. CIEP set up three different sub-projects that also fit into its general research topics. The CIEP Asia project covers energy-related developments that occur in Asia or result from major Asian economies' rapidly increasing demand for energy. The focus of the three projects includes aspects that are also relevant to European policy makers and multinational energy companies.

The first project focuses on the possible diversification of Russian oil and gas supplies towards East Asia and China's energy cooperation with Central Asia countries. The second project examines the economic and geopolitical consequences of China's and India's quests for oil in Africa. The third project assesses the reforms underway in China's and India's power sectors as well as policy initiatives in both countries that aim at the transition to a low-carbon economy.

### **World Energy Council**

CIEP traditionally hosts the board meetings of WEC NL, and one CIEP staff member is a member of the board. Also, two events for young energy professionals were organised by CIEP in collaboration with the TBM department of the TU Delft on behalf of WEC NL. In addition, CIEP contributed to national and European preparatory discussions and analyses on the forthcoming WEC scenarios for 2050. CIEP thinking, among others, was instrumental for developing the analytical framework for the scenarios, especially with regard to the global geopolitical context. CIEP will hold a special scenario seminar in June 2007.

### **CIEP Platform on International Energy Policy**

This platform, where high- and medium-level policy makers from Dutch government departments (Economic Affairs, Environment, Foreign Affairs) meet and discuss relevant international energy policy developments had five meetings in 2006. Meetings are strictly informal under Chatham House Rules, and no records are taken. Issues that were discussed in 2006 dealt largely with the ongoing EU energy policy debates, triggered by the EU's Green Paper in spring 2006. The platform exchanged views on the Dutch memorandum, on CIEP's reaction to the Green Paper and on the issue of fuel mixes. In addition, issues surrounding energy sustainability were discussed on the basis of a presentation by MNP, energy security issues were discussed following a presentation from Clingendael experts, and energy transition policies were discussed as a follow up to the CIEP organised seminar on energy transition. CIEP intends to continue this platform in 2007 and will regularly consult with the departments on the agenda issues.

### **Training programmes**

Training and education are an important part of CIEP's work. These programmes respond to a growing need for an integrated approach to energy training.

To gain a better understanding of the complexity of national and EU policies, international politics and market developments in energy, the Clingendael International Energy Programme again designed its own energy curriculum in 2006 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 quality and the number of participants. Participant satisfaction was underpinned by the returned evaluation forms.

- |  |                   |
|--|-------------------|
| • The Geopolitics of Energy              | 30 March 2006     |
| • The European Quest for New Gas         | 8 May 2006        |
| • The New Dilemmas for the Power Sector  | 9 May 2006        |
| • Sustainable Energy in a Changing World | 11 September 2006 |
| • Energy and International Security      | 6 November 2006   |

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

- |  |                               |
|--|-------------------------------|
| • One-day energy seminar for Iraqi diplomats                                   | 15 February 2006              |
| • Three-day energy ‘megacasus’ on security of supply for young Dutch diplomats | 14-16 June 2006               |
| • One-week course in energy geopolitics for E. European and C. Asian diplomats | 27 November - 1 December 2006 |

In addition CIEP staff lecture in courses given by the Clingendael Institute, the Energy Delta Institute, Groningen University and Delft University of Technology 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 for the media. In 2006, over 220 presentations, lectures and interviews were given by CIEP staff. Also, the CIEP website served as an important source of information on publications, activities and training programmes.

### **Networking**

CIEP is primarily a networking 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 for new issues in international and national energy. The various study groups and meetings with CIEP’s supporting institutions are also networking events.

#### *CIEP’s supporting institutions*

In 2006, CIEP was supported by the following institutions:

- Dutch Ministry of Economic Affairs
- Energie Beheer Nederland
- N.V. Nederlandse Gasunie
- Gasterra
- 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 2006 in CIEP research and study groups, e.g. Gas Study Group, Electricity Study Group, the Sustainability Group en the Interdepartmental Discussion Group.

#### *CIEP's 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 (TU Delft)
- CE Delft
- Netherlands Environmental Assessment Agency (MNP)
- Algemene Energieraad
- Vrije Universiteit Amsterdam (IVM)

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)
- Atlantic Commission (Washington, D.C.)
- Yale University Business School
- World Energy Council (WEC)
- Institute for Political and International Studies (IPIS, Iran)
- Moscow State Institute of International Relations (MGIMO)
- Waseda University (Japan)

In 2006 the cooperation between CIEP and EPC, a well-established platform for European policy-related discussions, continued.

#### **Internal Organisation**

CIEP has finalised 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 has created more transparency with regard to time, money and output. CIEP uses time registration ('Big Ben' software) which allows to prioritise time and assets.

## 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.

*The European Market for Seasonal Gas Storage*

CIEP, February 2006

*Energy in a changing world / Energie in een veranderende wereld*

Coby van der Linde

CIEP Energy Paper, The Hague, Clingendael Institute, March 2006

*Gas to Power in Europe*

Christoph Tönjes

CIEP, International Gas Union / Energy Delta Institute, March 2006

*Ruimte voor nationaal energiebeleid*

Ir. M.E.E. Enthoven and Prof. Dr. J.G. van der Linde

CIEP, Energie Forum Nederland i.o., 17 March 2006

*The paradigm change in international natural gas markets and the impact on regulation*

Coby van der Linde, Aad Correljé, Jacques de Jong and Christoph Tönjes

CIEP, International Gas Union (IGU)/Clingendael, April 2006

*Energy Supply Security and Geopolitics: A European Perspective*

Aad Correlje and Coby van der Linde

Energy Policy, vol. 34 (2006), pp. 532-543

*Oil Regime Change in Iraq: Possible Strategic Implications for OPEC*

Timothy A. Boon von Ochssée

CIEP Energy Paper, The Hague, Clingendael Institute, June 2006

*EU Standards for Energy Security of Supply*

Jacques de Jong, Hans Maters, Martin Scheepers en Ad Seebregts

CIEP, The Hague, Clingendael Institute/ Petten, Energy Research Centre of the Netherlands,

CIEP/ECN, June 2006

*The European Electricity Market: Some Trends and Consequences for Investments in the Netherlands*

Stephan Slingerland, Christoph Tönjes and Jacques de Jong, June 2006

*Securing and Fuelling China's Ascent to Power: The Geopolitics of the Chinese-Kazakh Pipeline*

Susann Handke

CIEP Energy Paper, The Hague, Clingendael Institute, August 2006



*Liberalising Dutch Energy Markets – Champions and governance, rules and regulations: The 1995-2005 stories*

Jacques de Jong

CIEP Energy Paper, The Hague, Clingendael Institute, September 2006

*Uranium Winning – Voorzieningszekerheid, milieu-en gezondheidseffecten en relevantie voor Nederland*

CIEP, CE Delft and NRG, October 2006

*Coalitions for Energy Innovation in Europe (Final report)*

CIEP, The Hague, Clingendael Institute, December 2006

### **CIEP articles**

*Hydrocarbon molecules are increasingly asked for their passports*

Article by Jacques de Jong, Foreign Voices, November 2006

CIEP's Contribution to the Commission's public consultation on the Green Paper 'Energy'  
September 2006

*Tomorrow's Mores: The future geopolitical system, and the structure of the international oil market*

Coby van der Linde, Wilbur Perlot and Femke Hoogeveen

Article, Politica Exterior, July/August 2006

*Schaken met energie: Nederland en de internationale energiewetgeving*

Stephan Slingerland and Lucia van Geuns

(NL) Article for Idee, July 2006

*Europa bedreigt eigen energietoekomst*

Wilbur Perlot

(NL) Article Financieele Dagblad 23 May 2006

*Energie in een veranderende wereld*

Coby van der Linde

(NL) Article, Internationale Spectator, April 2006

*Signalen uit de oliemarkt: de juiste strategie op het juiste moment*

Aad Correljé and Lucia van Geuns

(NL) Article, Internationale Spectator, April 2006

*Een beetje verslaafd bestaat niet: omslag in het Amerikaanse energiebeleid?*

Jacques de Jong and Stephan Slingerland

(NL) Article, Internationale Spectator, April 2006

*'De stenen aftasten en de rivier oversteken': het Chinese energiebeleid*

Susann Handke

(NL) Article, Internationale Spectator, April 2006

*Wie is afhankelijk van wie?: de betrekkelijke kwetsbaarheid van de EU-gasmarkt*  
Christoph Tönjes and Wilbur Perlot  
(NL) Article, Internationale Spectator, April 2006

*Turbulentie in de pijpleiding: gasconflict Rusland-Oekraïne en Russisch-Europese energierelaties*  
Coby van der Linde and Geert Greving  
(NL) Article, Internationale Spectator, April 2006

*Van Lissabon tot Kyoto: de ambities van het Europese energie-innovatiebeleid*  
Stephan Slingerland and Lucia van Geuns  
(NL) Article, Internationale Spectator, April 2006

### **CIEP briefing papers**

Follow-up to *'Moving beyond the stalemate: Addressing the nuclear challenge by supranational means'*  
Ruud Lubbers  
CIEP Briefing Paper 3, The Hague, Clingendael Institute, April 2006

### **CIEP Columns**

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

- Vertrouwen scheppen is elkaar serieus nemen, 21 november 2006
- Wat is goedkoop?, 7 november 2006
- Niets nieuws uit het Oosten, 17 oktober 2006
- Diep ingegraven, 26 september 2006
- Het ene lek is het andere niet, 5 september 2006
- Vuurwerk, 15 augustus 2006
- Juridisch imperialisme, 13 juni 2006
- The gasification of international relations, 6 juni 2006
- Ruimte voor nationaal energiebeleid, 23 mei 2006
- Als het niet linksom niet lukt dan maar..., 2 mei 2006
- Oude en nieuwe partnerships, 11 april 2006
- Zekerheid in vraag en aanbod, 21 maart 2006
- Voor de politieke Bühne?, 28 februari
- Tijden van beroering, 7 februari 2006
- Partners met Gazprom, 17 januari 2006

## CIEP Activities

CIEP organised numerous activities (meetings, training programmes, conferences, etc.) in 2006. A listing is given below.

24 January 2006

*CIEP Future Fuels Seminar 'Nuclear Energy and EU Energy Policy'*

On Tuesday 24 January 2006, CIEP organised a seminar on nuclear energy and EU energy policy. Speakers at this seminar included H.E. Mr. Laurens-Jan Brinkhorst, Minister of Economic Affairs of The Netherlands; Mr. Ruud Lubbers, ECN Supervisory Board Chairman and former Dutch Prime Minister; Mr. Thierry Dujardin of OECD/NEA; Mr. Christian Waeterloos, of the European Commission's DG Transport and Energy; Mr. Hans Forsström of the International Atomic Energy Agency; Mr. Helmut Engelbrecht, Urenco; and Clingendael's Prof. Jaap de Zwaan. Nuclear energy is back on many policy agendas in EU countries. Both climate change concerns and increasing awareness of longer-term security of supply make nuclear energy look more attractive again in the eyes of many. European countries that have decided in the past to phase out the role of nuclear energy seem to be reconsidering, while others are reconfirming, this decision.

24 January 2006

*High-level conference on the regulation of natural gas markets, Paris*

(Organised by the International Energy Agency in cooperation with IGU and CIEP)

CIEP has been involved 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 were presented at the World Gas Conference in Amsterdam, June 2006. The project is sponsored by EnergieNed.

31 January 2006

*CIEP-EPC Policy Dialogue 'European Energy Security'*

On Tuesday 31 January, CIEP and the European Policy Centre organised a policy dialogue on European energy security. The conference brought together a number of high-level experts as well as representatives of industry and civil society, including NGOs and other think tanks.

3 February 2006

*CIEP Gas Market Seminar 'LNG Impacts on Northwest Europe'*

LNG is high on the agenda of the gas industry and policy makers in Northwest Europe. The last few years has seen a mushrooming of LNG regasification plant projects. The Belgian terminal is being expanded, and in The Netherlands preparations are underway for the development of three LNG terminals, while in Germany the construction of a terminal in Wilhelmshaven is again under active consideration. These dynamics warrant continued discussion and analysis of the impact LNG will have on European gas markets, and in particular on the Northwest European region.

21 March 2006

*Clingendael Energy Lecture 'Dutch Energy Policy in an International Perspective'*

On Tuesday 21 March 2006 H.E. Mr. Laurens-Jan Brinkhorst gave a Clingendael energy lecture on Dutch Energy Policy in an International Perspective. After the lecture there was a lively Q&A session with the Minister.

13 April 2005

*CIEP-NGIZ Seminar on 'Energy and International Security'*

Prof. Dr. Rob de Wijk, Director of the Clingendael Security and Conflict Programme and of the Clingendael Centre for Strategic Studies, and Prof. Dr. Coby van der Linde, Director of the Clingendael International Energy Programme, presented a broader context for answering this question and addressed the subject of how energy has become part of foreign and security policy. The first focused on international security risks and their impact on global energy flows, while the latter focused more on the geopolitical and geo-economic changes that occur and the way these influence energy trade relations. The seminar was chaired by Prof. Alfred van Staden, Chairman of the Board of NGIZ.

26 April 2006

*CIEP-WEC Young Professionals' Workshop 'Beyond the Traffic Jam: Mobility and Innovations'*

In this afternoon workshop organised by CIEP and the World Energy Council, young professionals developed their own visions on future mobility. After an introduction about the social aspects of mobility and possible technical solutions, they worked in small discussion groups on solutions. These subsequently were judged on their practicality by top-transport advisor Frits Hermans, chairman of the Dutch Transition Platform on Mobility.

16 May 2006

*CIEP Future Fuels Seminar 'The Return of King Coal: New Perspectives for Coal as a Clean Energy Source?'*

In this seminar CIEP addressed the future of international coal markets and the role of clean coal technologies herein. Speakers from industry, policy makers, non-governmental organisations and researchers gave their view on past, present and future of coal in energy markets and possible roles for clean coal technologies. Europe and Asia served as case studies to explore possible roles in more detail. The seminar concluded with a panel discussion in which the audience talked with speakers about perspectives for coal as a future clean energy source.

12 June 2006

*CIEP-CE Debate 'Welke Nieuwe Elektriciteitscentrale in Nederland?'*

CIEP organised the seminar jointly with the 'Bezinningsgroep Energiebeleid' and environmental consultancy CE in Delft. Speakers from the power generation sector, environmental organisations, policy makers and researchers gave introductions on the topic, after which the floor was open to the public to give their opinions and exchange their views with the speakers.

20 June 2006

*CIEP lecture by Professor Oystein Noreng of the BI Norwegian School of Management entitled "Power relations in energy markets: security of supply, security of demand and market stability for oil to the world and gas to Europe".*

Oystein Noreng is professor at the BI Norwegian School of Management. He is the author of, among others, the book Crude Power: Politics and the Oil Market. The second edition of this publication was released at the end of 2005.

17 October 2006

*Seminar: Kick-off Clingendael Asia Studies*

This seminar addressed the various projects of the Clingendael Asian Studies aimed at promoting academic and public discussion on a diverse range of topics relating to Asia's international relations. CIEP will focus on 'Energy security' in Asia.

30 October 2006

*CIEP seminar 'Energiebeleid, valt er nog wat te kiezen?' (Dutch Energy Policy: does the voter have real choices?)*

This was a debate on the election programmes of the various Dutch political parties held at the Clingendael Institute on 30 October. In preparation for the debate, CIEP compared the energy parts of the various election programmes. Energy specialists of five main Dutch parties briefly presented their views on energy policy, commented upon by two independent energy experts. The event concluded with an open debate between politicians, experts and the audience.

31 October 2006

*Regional workshop 'EU Standards for Energy Supply Security'*

Commissioned by the Dutch Ministry of Economic Affairs, CIEP and ECN did a study on EU Standards for Energy Supply Security. CIEP and ECN organised a one-day workshop for government experts from NW European countries. The methodology in its pilot phase was discussed, and participants were given ample opportunity to comment on the method and its parameters.

7 November 2006

*First Workshop 'Relations with Russia', organised by CIEP in collaboration with the Dutch Ministry of Economic Affairs*

This closed expert meeting, featuring government and business representatives, aimed at discussing the relations between the Netherlands and the EU & the Russian Federation. During the workshop, lectures were given on Russia's recent political and economic development and on the energy cooperation between Russia and the EU. Further, representatives from the gas industry and the bank sector shared their views with the participants. The discussion during the afternoon session also raised issues such as enhancing energy efficiency in Russia, co-operation between the EU and Russia as part of the Kyoto process, and geopolitical aspects of EU expansion and its impact on Russia's policies.

16 november 2006

*WEC Young Professionals' Workshop 'Energie efficiëntie, helemaal niet moeilijk' ('Energy efficiency, not that hard')*

How can the Dutch government pragmatically reach their targets for an annual two percent reduction in energy use in the consumer sector? The World Energy Council Netherlands, in cooperation with the Clingendael International Energy Programme, organised a workshop to involve young professionals from the energy sector in reaching this goal.

24 November 2006

*International workshop 'Coalitions for Energy Innovation in Europe'*

In this workshop a small number of possible international coalition partners discussed co-operation and international policy coalitions in the area of energy innovation and transition. This workshop was part of a research project looking into the politics of energy transition in the European Union.

29 November 2006

*CIEP Workshop 'The future of gas exploration and production in The Netherlands'*

The Netherlands has been rather successful in developing its domestic gas reserves. However, in The Netherlands production from 'small fields' (all fields except the giant Groningen field) is declining. The exploration potential appears to be limited and the incumbent parties leave The Netherlands or reduce their activities. The latter is only partially being compensated by the emergence on the scene of new, mostly smaller, players. This background, in combination with developments in the international gas market and the increasing attention paid to security of supply, warrants a closer look at whether Dutch natural gas reserves are being optimally exploited. If that is not the case, one needs to discuss whether and how current mining policies in The Netherlands should be adapted.

CIEP organised an expert workshop on these issues to take an inventory of the exploration and production outlook, technology and cost developments, and current policies in The Netherlands.

5 December 2006

*CIEP CEO Energy Lunch with Mr. Sergey Bogdanchikov, CEO of Rosneft  
Russia's role in ensuring energy security ( Brussels)*

Mr. Bogdanchikov shared and discussed his views on the vision and strategy of Rosneft in the coming years with the audience. In his lecture Mr. Bogdanchikov gave an overview of international oil markets and Russia's position in these markets and underlined the importance of international cooperation for creating reliable business conditions. Moreover, he offered his views on how Rosneft can expand into new markets and at the same time broaden its upstream and downstream asset base.

12 December 2006

*Clingendael Energy Lecture 'European energy markets and energy policy' by  
Dr. Dieter Helm*

The influential British energy expert Dr. Dieter Helm thoroughly analysed the current challenges to European energy markets in a Clingendael Energy Lecture on 12 December 2006. Helm underlined that security of energy supply and climate change need to be the focal points of any European energy policy. He pleaded for a strengthening of the EU's commitment to combating climate change, looked into the consequences of import dependency for internal market organisation, and also touched upon the implications of Germany's special relationship with Russia for the development of a common European energy policy. Against the backdrop of current developments in world energy markets and recognising the importance of solidarity and cooperation between EU Member States, Dr. Helm developed concrete elements of such a common EU energy policy.

## **Meetings**

The *CIEP Contact Group* convened on 28 March, 13 June, 9 October and 5 December 2006.

The *CIEP Advisory Board* convened on 20 June and 12 December 2006.

The Board of *Stichting Fonds Instituut Clingendael* convened on 30 May and 13 November 2006.

The *Electricity Study Group* convened on 25 April, 30 June, 18 September and 10 November 2006.

The meeting dates of the *CIEP Gas Group* were 18 April, 30 May, 20 June, 19 September, 17 October and 21 November 2006.

The *Sustainability Study Group* convened on 15 February, 10 April, 30 June, 29 August, 16 October and 14 December 2006.

The *Platform International Energy Policy* convened on 15 March, 30 May, 13 June, 8 September and 4 December 2006.

## **Additional information**

### *Lectures, Speeches and Presentations*

In 2006 CIEP staff members gave a total of 120 lectures, speeches, and presentations or chaired sessions during training courses, conferences and seminars (a selection of the external lectures are listed in Appendix 3)

### *Media*

CIEP staff members gave over 100 interviews for radio, television and newspapers in 2006.

### *Website*

Since 2005 the Clingendael Institute has had a new website, and the number of visitors and downloads are no longer tracked.



**Staff**

In 2006, the CIEP staff consisted of eleven people:

Coby van der Linde	director	(0.7 fte)
Lucia van Geuns	senior researcher/deputy	(0.8 fte)
Christoph Tonjes	researcher	(1.0 fte)
Wilbur Perlot	researcher	(1.0 fte) (until 01-09-2006)
Femke Hoogeveen	researcher	(1.0 fte) (until 17-09-2006)
Stephan Slingerland	senior researcher	(0.8 fte)
Susann Handke	researcher	(0.4 fte) (since 01-01-2006)
		(0.8 fte) (since 01-07-2006)
Warner ten Kate	researcher	(1.0 fte) (since 01-10-2006)
Stijn van den Heuvel	researcher	(1.0 fte) (since 01-11-2006)
Wendy Auf dem Brinke	secretary	(0.6 fte)
Micha Wortelboer	administrator	(0.4 fte) (since 01-11-2006)

In addition to the core staff, CIEP had 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 Correljé	associate fellow	(0.2 fte)
Kurt Radke	associate fellow	(project basis)
Mehdi Amineh	associate fellow	(project basis)
Paul Nillesen	associate fellow	(project basis)
Reinaldo Figueredo	associate fellow	(project basis)

During 2006, the following people were connected for at least part of the year to CIEP staff:

Manon Korthals	student intern
Pieter Quartero	student intern
Wouter Pieterse	student intern

Other functions held by CIEP staff members:

Coby van der Linde                      Part-time Professor of Geopolitics and Energy Management, University of Groningen  
Member of the Dutch Energy Council  
Member of the Supervisory Board of Wintershall Nederland B.V. (WINL)

Lucia van Geuns                              Member of the board of the World Energy Council Netherlands (WEC NL)  
Member of the Earth and Climate Council (RAK) of the Royal Netherlands Academy of Arts and Sciences (KNAW)



## Appendix 1: 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. After the initial period 2001-2004, CIEP continued largely on the same footing as the previous years, 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 seventeen participating institutions.

The main reasons for initiating CIEP were:

1. The need for a forum in which 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; and
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 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; and
- 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 three 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; and
- C. Energy and sustainable development.

The staff of the Clingendael International Energy Programme, in co-operation 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](http://www.clingendael.nl/ciep) – part of the Clingendael website.

## Appendix 2: Nederlandstalig Jaarverslag 2006 Clingendael International Energy Programme (CIEP)

### Een opwindend begin

*Het jaar begon zeer energiek met de afsluiting van de gasstroom van Rusland naar de Oekraïne. Voorzover er nog twijfel was over het belang van energie in de internationale betrekkingen, werden deze twijfels meteen weggevaagd met de berichten dat het gas bestemd voor de Europese markt ergens in de pijpleidingcorridor in de Oekraïne kwijtraakte. Het conflict tussen de gasbedrijven en overheden uit beide landen over de gasprijs en de transitfee, dat de aanleiding vormde voor het stoppen van leveren van gas bestemd voor de markt in de Oekraïne, had naast een economische ook een politieke dimensie.*

*De Oekraïne was zich na de Oranje Revolutie aan het heroriënteren op het westen en er stonden belangrijke verkiezingen voor de deur. De relatie met Rusland stond onder druk. Tegelijkertijd werd de Oekraïne nog steeds voorzien van zeer goedkope energie op grond van een overeenkomst uit de jaren '90, waarin de energieleveranties aan de voormalige Sovjet republieken op niet-marktgerelateerde voorwaarden werden gedaan. Ook met Wit-Rusland bestonden dergelijke overeenkomsten. Deze overeenkomsten waren een overblijfsel van de desintegratie van de Sovjet-Unie en de pogingen om via de Gemeenebest van Onafhankelijke Staten (GOS) de politieke en economische relaties opnieuw te structureren. Inmiddels was zowel de prijs van het gas in Rusland zelf en het ingevoerde gas uit de Kaspische Zee regio al in prijs gestegen op grond waarvan Rusland de overeenkomsten wilde herzien. Inzet van de onderhandelingen was naast de prijs van het gas ook de controle of eigendom van de pijpleidingcorridor naar Europa.*

*De Europese gasmarkt is belangrijk voor Rusland. Ongeveer 80% van de gasleveranties aan de Europese markt gaan via de pijpleidingen door de Oekraïne. De liberalisering van de Europese gas- en elektriciteitsmarkt en daarmee het instellen van Third Party Access (TPA) op pijpleidingen had ook effect op de energierelatie met Rusland. Europa zaaide twijfel over lange termijn gas-contracten (die een stabiele bron van inkomsten zijn voor Gazprom en de overheid) en wilde af van de bestemmingsclausule. De liberalisering van de Europese markt zorgde ervoor dat Gazprom, het Russische gasbedrijf, minder zeker werd over de toekomstige afzet van Russisch gas en was bovendien bang dat TPA zou resulteren in enige verdringing van Gazprom of Russisch gas op de Europese markt, terwijl ook vloeibaar gas (LNG) een nieuwe concurrent zou worden van Russisch*

*gas. Men begon zich zorgen te maken over de positie van de gasindustrie in Rusland omdat driekwart van het in Rusland geproduceerde gas in Rusland zelf wordt geconsumeerd en om aan deze vraag te kunnen blijven voldoen de inkomsten uit Europa belangrijk waren voor het kunnen investeren in nieuwe gasvelden. Immers, de afstand van de gasvelden tot de markt (ook in Rusland) is groot en de investeringsbehoeften derhalve groot. Voor Rusland was de toegang tot de Europese markt en de controle over de (regulering van) pijpleidingen van strategisch belang. De heroriëntatie van de Oekraïne op het westen (Europa) kon, bij een verdergaande toenadering tussen de Oekraïne en Europa (eventueel middels het transit protocol van het Energiehandvest) immers uitmonden in een gas-reguleringsmodel naar EU voorbeeld. De EU was in haar naburige landenbeleid ook steeds duidelijk geweest, en nog, in de intenties het interne marktmodel ook buiten de EU te promoten.*

*De problemen op de Europese gasmarkt noopte het Russische bedrijf Gazprom de gaskraan na een dag weer vol open te zetten. Hoewel de economische effecten van de gascrisis gering waren, zijn de politieke consequenties erg groot gebleken. Energie steeg met stip op de internationale politieke agenda, ook in de G-8 waar het Russische voorzitterschap energieveiligheid van producenten en consumenten agendeerde.*

*Ook in de EU werd energie een steeds belangrijker politiek thema, mede geholpen door de gascrisis. Energie werd de lakmoesproef voor verdergaande integratie, omdat thema's als interne markt, milieu en buitenlands beleid samengebracht moesten worden. In de EU van 25 landen, waar niet alleen grote verschillen bestaan in de samenstelling van de energiemix en in importafhankelijkheid maar ook in de buitenlandpolitieke houding ten aanzien van Rusland, bleek overeenstemming over het externe energiebeleid lastig. De relatie met Rusland leidde tot interne verdeeldheid in de EU, mede aangewakkerd door de gascrisis. Deze verdeeldheid uit zich in de verschillen in benadering van de interne markt, de alternatieve energiebronnen en samenwerking met producerende landen. De Baltische pijpleiding van Rusland naar Duitsland wordt door deze verschillen in inzichten het brandpunt in de discussie hoe om te gaan met het energierijke Rusland. Duitsland, maar ook Nederland, en later ook Frankrijk en Italië, lijken een voorkeur te hebben voor vervlechting van belangen door de hele waardeketen van gas, terwijl andere lidstaten waaronder de Oost-Europese*

landen en Groot-Brittannië vooral inzetten op vermindering van de import uit Rusland en reciprociteitsvragen stellen aan investeringen van Gazprom in de EU.

*Echter, de mogelijkheden tot diversificatie naar herkomst van olie en gas zijn beperkt en alternatieve energiebronnen bieden nog te weinig mogelijkheden tot vervanging, waardoor importen uit Rusland noodzakelijk zijn.*

*De gascrisis tussen Rusland en de Oekraïne was een spectaculair begin van het jaar en heeft veel losgemaakt in de politieke economie van energie.*

### **CIEP in 2006**

De meerjarige onderzoeksthema's van het CIEP: Energiemarktwerking in de EU; geopolitiek en voorzieningszekerheid; en duurzame (energie) ontwikkeling bewezen hun actualiteitswaarde omdat de ontwikkelingen in 2006 en de activiteiten die CIEP organiseerde volledig konden worden ondergebracht in de meerjarige thematiek.

### **Winter:**

De gascrisis veroorzaakte veel mediadruk in de eerste maanden van het jaar. Deze druk ging naadloos over in de aandacht voor het nieuwe groenboek op het gebied van energie dat in maart 2006 werd gepresenteerd. De onverwachte aandacht voor importafhankelijkheid, de energiemix en geopolitiek, paste naadloos op het CIEP-programma. In januari en februari vonden er bijeenkomsten op Clingendael plaats over nucleaire energie en de invloed van LNG op de Noordwest Europese markt. Met twee publicaties op het gebied van gas (*Issues for Gas to Power Globally- an Overview* en *The European Market for Seasonal Storage*) aan het begin van het jaar en de International Gas Union (IGU) studies (*Paradigm Change in International Gas markets and the Impact on Regulation and Gas to Power in Europe*) stond het CIEP midden in de gasdiscussie.

In Parijs werd in het kader van een studie voor de International Gas Union (IGU) samen met het Internationaal Energieagentschap (IEA) een expertbijeenkomst gehouden over regulering van gasmarkten. In het voorjaar volgde ter voorbereiding van de World Gas Conference in juni 2006 in Amsterdam nog een bijeenkomst in Maleisië.

De publicatie van de 'Mores' studie aan het eind van 2005 betekende dat het uitrollen van de onderzoeksresultaten vooral in 2006 moest plaatsvinden. Het thema geopolitiek en energie hoefde na de gascrisis weinig introductie. De gascrisis betekende ook dat de studie uit 2004 voor DGTREN over Voorzieningszekerheid en

Geopolitiek weer werd herontdekt. Samen met de 'mores' studie kon CIEP een brede bijdrage leveren in discussies over de dilemma's in de voorzieningszekerheid van olie en gas. Eind januari werd samen met het European Policy Centre (EPC) een bijeenkomst in Brussel georganiseerd over Europese voorzieningszekerheid, waar van CIEP-zijde de geopolitiek en energie scenario's werden gepresenteerd en een voorschot werd genomen op een studie van CIEP en ECN over de mogelijkheid van standaarden van voorzieningszekerheid. Geholpen door het turbulente begin van het jaar, was de opkomst zeer groot en leverde CIEP verschillende uitnodigingen op in Brusselse beleidsdiscussies. Zo werd er een bijdrage geleverd aan een discussie in februari van de Energy Foundation van het Europese Parlement (EP) en leverde CIEP in 2006 tweemaal een optreden in een EP hoorzitting over energie (mei en september).

In de publicatie *Energie in een Veranderende Wereld* worden de veranderingen in het internationale politieke systeem en de toenemende voorkeur voor staatsingrijpen in de energiesector geanalyseerd.

De toegenomen belangstelling voor de internationale politieke aspecten van energie en de initiatieven van de Europese Commissie een Europees beleid gestalte te geven, gaf een extra dimensie aan de Clingendael Energy Lecture van ZE Laurens Jan Brinkhorst, Minister van Economische Zaken. Hij sprak over het Nederlandse energiebeleid in een internationaal perspectief. Na de lezing volgde een levendige discussie met de aanwezigen, onder andere over de positie van Nederland ten aanzien van mogelijke investeringen van Gazprom in Nederland en de positie van Nederland als knooppunt van gasinfrastructuur en handel.

In een gezamenlijke publicatie voor Energieforum Nederland wordt in het licht van de Europese initiatieven in de richting van een EU energiebeleid samen met Marius Enthoven, de *Ruimte voor nationaal energiebeleid* onderzocht.

In de energietraining 'The Geopolitics of Energy', eind maart, konden we als CIEP-staf de recente ontwikkelingen in de olie en gasmarkten nog eens de revue laten passeren.

### **Voorjaar:**

*In het voorjaar werd met het naderen van de G-8 bijeenkomst in St. Petersburg de geopolitieke spanning over energieveiligheid verder opgevoerd. De VS was vooral bezorgd over de eigen olievoorzieningszekerheid, maar mengde zich ook in de discussie over de grote importafhankelijkheid van de Oost-Europese en Baltische staten en de*

*pogingen van Gazprom om een deel van het eigendom van de infrastructuur in voormalige sovjet staten te verwerven. De routes van pijpleidingen in de Kaspische Zee regio bleven ook onderwerp van touwtrekken tussen de grote consumerende blokken. De olie en gasprijzen bleven onverminderd hoog in het voorjaar. China bleef de aandacht trekken door de vele keren dat president Hu Jintao naar de olieproducerende landen in het Midden-Oosten reisde, maar ook door de conferentie in China met alle Afrikaanse landen.*

In een gezamenlijke bijeenkomst van het CIEP en de NGIZ werd in april aandacht besteedt aan geopolitieke invloedsferen, mogelijke conflicthaarden tussen de grootmachten en de rol van energie. In *Energy Policy* (34 (2006), pp. 532-543) verscheen *Energy Supply Security and Geopolitics*.

In april 2006 verscheen een door CIEP gemaakt themanummer van de Internationale Spectator over internationale energie vraagstukken.

In mei vonden twee trainingen plaats: Een over de nieuwe stromen van gas naar Europa en een over de ontwikkelingen op de Europese elektriciteitsmarkt. In het kader van de serie bijeenkomsten over toekomstige brandstoffen werd, na de succesvolle bijeenkomst in januari over nucleaire energie waar minister Brinkhorst en de voormalige premier Lubbers spraken, in mei een bijeenkomst gehouden over schone steenkool technologieën. Ook vond er een bijeenkomst plaats met de Nederlandse delegatie voor de UN Committee on Sustainable Development, waarvoor het CIEP een aantal discussiepapers had geschreven ter voorbereiding.

In 2006 werd ook weer samengewerkt met andere organisaties. Het CIEP was betrokken bij de voorbereidingen van de WEC-scenarios. Deze zullen in 2007 in Rome worden gepresenteerd. Ook werd samen met WEC NL een seminar georganiseerd voor jonge energie-professionals over mobiliteit en innovatie. Samen met CE en de Energiebeziningsgroep werd een bijeenkomst gehouden over welke elektriciteitscentrale voor Nederland. *The European Electricity Market: Some Trends and Consequences for Investments in the Netherlands*) diende als leidraad voor de discussie.

Begin juni vond het congres van de IGU in Amsterdam plaats. Via de twee studies over Gas voor de opwekking van elektriciteit en regulering van de gasmarkt en een presentatie en optreden in een discussieforum was de betrokkenheid van het CIEP groot.

## **Zomer**

*Het begin van de zomer stond vooral in het teken van de G-8 bijeenkomst in St. Petersburg waar 'security of supply' en 'demand' nadrukkelijk door Rusland op de agenda was gezet. In Europa was enige discussie ontstaan over de Baltische pijpleiding van Rusland door de Oostzee naar Duitsland. Zowel de Baltische staten als Polen maakten bezwaar tegen deze pijpleiding, die door Gazprom en EonRuhrgas en Wintershall zou worden gebouwd. Gasunie uit Nederland had ook belangstelling om in het consortium mee te doen. In de EU begon zich een scheiding der geesten af te tekenen over de gasrelatie met Rusland waarbij Duitsland, Nederland, Italië, Frankrijk en Finland aan de kant van de integratiebenadering stonden (vervlechting van belangen in de upstream en downstream als strategie tegen mogelijke disruptierisico's) terwijl de Oost-Europese landen en Groot-Brittannië vooral inzetten op vermindering van de import uit Rusland en anderzijds strenge reciprociteitseisen wilden stellen aan mogelijke investeringen van Gazprom in de EU door toegang op de Russische pijpleidingen en in de productie van olie en gas te eisen. Ogenscheinlijk bestaat er weinig verschil tussen de twee kampen maar politiek bestaat er een wereld van verschil in benadering van Rusland. De discussie in de EU werd verder op scherp gezet door uitlatingen van de Amerikaanse vice-president Cheney die in toespraken in de Baltische staten en de Kaukasus de geopolitieke impact van energieafhankelijkheid van Rusland aan de kaak stelde. De uiteindelijke G-8 bijeenkomst van de regeringsleiders werd echter overschaduwd door het conflict tussen Israël en Hezbollah.*

Aan het begin van de zomer was de publicatie *Oil Regime Change in Iraq: Possible Strategic Implications for the OPEC* gereed, kort daarop gevolgd door de publicatie *Securing and Fuelling China's Ascent to Power; The Geopolitics of the Chinese-Kazakh Pipeline*.

Met voorzieningszekerheid steeds hoger op de politieke agenda was de Clingendael Energy Lecture van Professor Oystein Noreng *Power Relations in Energy Markets- Security of supply, Security of Demand and Market Stability for Oil and Gas to Europe* zeer actueel.

Ook de gezamenlijke studie met ECN *EU Standards for Energy Security of Supply* benadrukte de inbreng van CIEP in de Europese voorzieningszekerheidsdiscussie. In het najaar werd hierover een expertseminar georganiseerd.

In September werd de consultatieronde van de Europese Commissie over het energie groenboek afgesloten. Met een schriftelijke bijdrage en een

uitnodiging om bij te dragen aan de expertmeeting in het Europees Parlement was CIEP nauw betrokken bij de Europese discussie. Ook werden door verschillende CIEP-ers presentaties gehouden in Nederland en in Brussel over de verschillende onderwerpen van het groenboek en vormden een mooie afsluiting van de zomer.

In september werd een trainingsdag gehouden over duurzame energie in een veranderende wereld.

### **Herfst**

*De initiatieven van China in het Midden-Oosten, Afrika en Latijns-Amerika waren niet onopgemerkt gebleven. De president van China Hu Jintao reisde naar verschillende energieproducerende landen en ontving de Afrikaanse landen in China voor overleg op hoog niveau. De initiatieven van China brachten de potentieel scherpe concurrentie tussen consumerende landen een stukje dichterbij. China schroomt niet om met landen samen te werken waarmee de VS en Europa politiek enige moeite hebben (zoals Soedan en Myanmar). Ook zoekt het land toenadering tot Rusland om een verbinding te maken met de olie- en gasrijke regio's van het land. China is ook een factor van betekenis in de Kaspische Zee regio.*

De deelname van CIEP aan het Clingendael Asian Studies (CAS) zorgde ervoor dat de kennis over de regio op het gebied van energie kon worden ingebracht in een breder onderzoekprogramma. In het kader van het CAS zijn 3 CIEP-projecten ingebracht die de komende 3 jaar zijn beslag moeten krijgen.

Nederland was dit jaar in de ban van de vervroegde Tweede Kamerverkiezingen. Hoewel energie en milieu, ondanks de brief van premier Balkenende en de presentatie van het boek en de film van Al Gore, nauwelijks een rol speelde in de verkiezingsstrijd, heeft CIEP op grond van een paper *Energiebeleid, valt er nog wat te kiezen* eind oktober een lagerhuisdebat georganiseerd.

In het najaar vond er ook een workshop plaats over Energietransitie en internationale coalities, waarvoor CIEP in opdracht van EZ/VROM een aantal verkenningen uitvoerde. Verder werd in opdracht van VROM en in samenwerking met CE en NRG een rapport gemaakt over uranium.

In november werd een expert seminar georganiseerd over de relatie EU-Rusland waar energie uiteraard een belangrijke maar niet exclusieve rol in vervulde. Tevens werd een trainingsdag gehouden over veiligheid en energie.

Op 5 december 2006 werd in Brussel de eerste Clingendael CEO Energy Lunch gehouden waarbij

een onderneming uit de energiesector een presentatie geeft, gevolgd door vragen uit het publiek, over actuele ontwikkelingen en de strategie van de onderneming. De eerste lezing werd gehouden door Sergey Bogdanchikov, President and Member of the Board of Directors van Rosneft. De opkomst was aanzienlijk en was bovendien een goede afspiegeling van vertegenwoordigers van landen, medewerkers van de Commissie en van het Europese Parlement.

Op 12 december hield Dieter Helm een Clingendael Energy lecture over *'European energy markets and energy policy'* en werd het jaar afgesloten met een prikkelende lezing over de uitdagingen van het EU energiebeleid en de relaties met landen als Rusland.

### **Appendix 3: External lectures by CIEP staff**

Thursday, 15 November 2006

The issue of energy & sustainability  
Jacques de Jong, BP Annual Forum  
Energy/Sustainability, Madrid

Monday, 13 November 2006

Liberalisation of EU gas markets  
Jacques de Jong, EDI/GLRC, Groningen

Friday, 10 November 2006

Beschikbaarheid van aardolie  
Lucia van Geuns, Specialisten serie Museon, Den Haag

Monday, 30 October 2006

EU energy policy & energy relations with Russia  
'EU-Russia Dialogue'  
Coby van der Linde, Moscow

Monday, 30 October 2006

Geopolitics, big oil and the 'New Reality'  
Lucia van Geuns, Global Economics Conference  
(Shell), Den Haag

Friday, 20 October 2006

Geopolitics, big oil and the 'New Reality'  
Lucia van Geuns, Offshore Engineering  
Symposium, TUDelft

Thursday, 19 October 2006

Energie van de toekomst  
Lucia van Geuns, Wetenschapscafe in het kader van  
de WettenWeken, Concordia, Den Haag

Wednesday, 18 October 2006

Inzicht in de oliemarkt  
Lucia van Geuns, NUON Seminar, Universiteit  
Nyenrode, Breukelen

Friday, 13 October 2006

Hydrocarbon pricing  
Lucia van Geuns, Course 'Survey of Offshore  
Engineering', TUDelft

Thursday, 12 October 2006

EU energy policy  
Coby van der Linde  
Bruegel, Brussels

Tuesday, 10 October 2006

Global issues in natural gas markets  
Jacques de Jong, World Forum on Energy  
Regulation, Washington (DC)

Thursday, 5 October 2006

EU energy policy  
'Conference Berlin'  
Coby van der Linde, Berlin

Friday, 29 September 2006

The NW European energy market  
Jacques de Jong, Master Class Economen Congres  
Groningen

Wednesday, 27 September 2006

Peak Oil and the International Oil Market  
Lucia van Geuns, Shell EP Europe Seminar, Zeegse  
(Drenthe)

Tuesday, 26 September 2006

Energy markets  
Lucia van Geuns, Master Energy and Environment  
Law, Catholic University of Leuven, Leuven  
(Belgium)

Thursday, 22 September 2006

Geopolitics and the international oil market  
Jacques de Jong, Impulse Talk, Expert Workshop  
on Raw Material Scarcity, Berlin

Friday, 22 September 2006

European gas markets  
'Eurogas Annual Conference'  
Coby van der Linde, Brussels

Wednesday, 15 September 2006

Duurzame energie in een veranderende wereld.  
Christoph Tönjes, Wereldlezing Biobased Energy,  
Wageningen

Thursday, 14 September 2006

Energy security  
'NATO Seminar'  
Coby van der Linde, Brussels

Wednesday, 13 September 2006

Geopolitics & the energy issue  
Jacques de Jong, HL Course European Security &  
Defense College, Brussels

Sunday, 10 September 2006

Business Roundtable with Government of Oman  
Coby van der Linde, Muscat

Thursday, 7 September 2006

EU gas markets: Recent trends and mid-term  
perspectives  
Christoph Tönjes, Essent Management Trainees,  
Breda

Wednesday, 6 September 2006

The oil industry: Risks and resource development  
Lucia van Geuns, EU Seminar 'Hydrocarbon  
Prospects and Energy Futures', Brussels



Thursday, 31 August 2006  
Energy: What lies ahead  
Lucia van Geuns, Themabijeenkomst 'De olie is op! Wat nu?' Jong Management, Roermond

Wednesday, 26 July 2006  
Restructuring the gas industry: Regulation and security of supply  
Jacques de Jong, ERRA Summer School, Budapest

Tuesday, 20 June 2006  
Impressies van de World Gas Conference 2006  
Christoph Tönjes, KIVI NIRIA Avondlezing, The Hague

Friday, 16 June 2006  
The social component of sustainability and universal energy access  
Jacques de Jong, Florence School of Regulation, Fiesole (It)

Friday, 16 June 2006  
The oil industry: Risks and resource development  
Lucia van Geuns, 9th Conference Economics of Infrastructures, TBM TUDelft

Thursday, 15 June 2006  
World Gas Conference 2006: Highlights of the regulatory debate  
Christoph Tönjes, 9th Conference Economics of Infrastructures, TU Delft

Wednesday, 14 June - Friday 16 June 2006  
Energy casus: security of supply  
Coby van der Linde, Lucia van Geuns, BZ Diplomates, Campus Den Haag, The Hague

Wednesday, 14 June 2006  
European liberalisation in energy markets and EU energy policy  
Jacques de Jong, ERRA Training New Commissioners, Siodok (H)

Saturday, 10 June 2006  
Panel discussion at Alumni Day, University of Amsterdam  
Coby van der Linde, Amsterdam

Wednesday, 7 June 2006  
International energy markets: economic and geopolitical developments  
Wilbur Perlot, Conference 'Oil and gas, the driving forces of the economy, ECU '92', Utrecht

Monday, 5 June 2006  
The paradigm change and EU regulation of gas markets  
Coby van der Linde  
IGU-Amsterdam

Tuesday, 23 May 2006  
Energy in a changing world  
Coby van der Linde, Rotary Sassenheim Sassenheim

Thursday, 18 May 2006  
EU gas markets and global competition  
Christoph Tönjes, NUON Juristenseminar, Amsterdam

Wednesday, 17 May 2006  
World conventional oil production: Challenges and uncertainties  
Lucia van Geuns, Presentation PGK, KIVI, The Hague

Monday, 15 May 2006  
Developments in the international oil market  
Lucia van Geuns, Presentation for Staalbankiers, Utrecht

Thursday, 11 May - Friday, 12 May 2006  
Liberalisation & supply security: The regulatory challenge  
Jacques de Jong, Regulatory Round Table & Annual Conference Florence School of Regulation, Florence (It)

Wednesday, 10 May 2006  
The race for oil assets  
Lucia van Geuns, Presentation for YEPP workshop E&P opportunities, KIVI The Hague

Tuesday, 9 May 2006  
European Parliament, 'Hearing on energy geopolitics'  
Coby van der Linde, Brussels

Thursday, 27 April 2006  
High oil prices: causes and consequences  
Wilbur Perlot, [www.internationalconference.nl](http://www.internationalconference.nl), Tilburg

Thursday, 27 April 2006  
International relations and energy  
Coby van der Linde, EFN Conference, Utrecht

Wednesday, 26 April 2006  
Wat zijn de drijvers van de olieprijs? Geopolitieke en economische factoren  
Wilbur Perlot, Oolder Convent, Roermond

Tuesday, 25 April 2006  
European gas market developments  
Presentation Finnish Natural Gas Association  
Coby van der Linde, Finland

Tuesday, 11 April 2006

The international oil market  
Lucia van Geuns, Presentation van Lanschot  
Bankiers, Amsterdam

Monday, 10 April 2006

European energy policy  
Coby van der Linde  
Bruegel, Brussels

Thursday, 6 April 2006

Changing approaches to gas market regulation and  
the relevance for Asian markets  
Christoph Tönjes, Petronas/IGU/CIEP Workshop  
on the regulation of Asian gas markets. Kuala  
Lumpur, (Malaysia)

Monday, 3 April 2006

European energy security  
Wilbur Perlot, Geneva Centre for Security Policy  
(Geneva)

Friday, 31 March 2006

Energieschaarste? Olie-en gasmarkten vandaag en  
morgen  
Christoph Tönjes, Uneto-VNI, Papenburg  
(Germany)

Thursday, 23 March 2006

Developments in the international oil market  
Lucia van Geuns, Presentation for Frieslandbank,  
Leeuwarden

Monday, 20 February 2006

Tomorrow's mores: The international system,  
geopolitical change and European energy security  
of supply  
Coby van der Linde, Energy Foundation, Brussels  
(Belgium)

Wednesday, 8 February 2006

Energy and geopolitics  
Wilbur Perlot, Jong EZ, The Hague

Friday, 3 February 2006

Russia, the EU and gas: is there a crisis in the  
pipeline?  
Coby van der Linde, Foreign Policy Centre,  
London (UK)

Thursday, 2 February 2006

The Russian-Ukraine gas crisis  
Coby van der Linde, Foreign Policy Centre,  
London

Tuesday, 31 January 2006

Geopolitics of resources and energy strategies  
Coby van der Linde, Academia Diplomatica  
Europaea, Brussels (Belgium)

Tuesday, 31 January 2006

Security of energy supply, CIEP/EPC meeting

Monday, 30 January 2006

Roundtable meeting, 'High oil prices'  
Coby van der Linde, Chatham House, London

Wednesday, 25 January 2006

Liberalisation of EU gas markets  
Jacques de Jong, EDI/GLRC, Groningen

Wednesday, 18 January 2006

The IEA 'World energy outlook 2005': Reality  
check or checking reality?  
Coby van der Linde, KVG, The Hague

Friday, 13 Januari 2006

The oil market: Challenges and uncertainties  
Lucia van Geuns, Presentation for Airneth  
symposium 'The challenges of high-priced oil for  
aviation', Amsterdam

Tuesday, 10 January 2006

The possibilities for global energy cooperation in a  
changing geopolitical landscape  
Wilbur Perlot, Lecture series, NWG, Wageningen

#### **Appendix 4: Energy lectures by CIEP staff for Clingendael courses**

27 Nov -1 Dec 2006

Alumni course Centraal Aziaten/Oost EU  
Coby van der Linde, Lucia van Geuns

2 November 2006

i/v carrousel 'Europa in vogelvlucht'  
Stephan Slingerland

31 October 2006

EWPPP opleiding (Balkan)  
Christoph Tönjes, Stephan Slingerland

12 October 2006

Leergang Buitenlandse Betrekkingen (LBB)  
Lucia van Geuns

10 October 2006

Diplomates Sudan  
Lucia van Geuns, Susann Handke

3 October 2006

Hogere Defensie Vorming  
Christoph Tönjes

2 October 2006

Leergang Oost-Europese Diplomaten (LOD)  
Christoph Tönjes

9 June 2006

Leergang Centraal-Aziaten (LCA)  
Wilbur Perlot, Susann Handke

2 May 2006

Diplomates Pakistan en Bangladesh  
Wilbur Perlot

19 April 2006

Diplomates Indonesia  
Wilbur Perlot, Christoph Tönjes

16 March 2006

Leergang ZO Europa LZOD  
Christoph Tönjes, Jacques de Jong

28 Febr, 14 March 2006

Leergang Topmanagement Defensie  
Coby van der Linde

22 February 2006

Leergang Nieuwe Lidstaten (LNL)  
Lucia van Geuns

15 February 2006

Diplomates Iraq  
Lucia van Geuns, Jacques de Jong