

ANNUAL REPORT 2024





CIEP is an independent forum for governments, non-governmental organizations, the private sector, media, politicians, and all other parties interested in changes and developments in the energy sector and energy related climate change issues.

CIEP organizes lectures, seminars, conferences, and roundtable discussions. In addition, CIEP staff members lecture in a variety of courses and training programs. CIEP also contributes to international and European debates on energy by actively participating in numerous international conferences and expert workshops – where research findings are disseminated and inputs for further research are gathered. CIEP's research, training and activities focus on economic and geopolitical dimensions of international energy and energy transition.

In 2024 CIEP is endorsed by The Netherlands Ministry of Economic Affairs and Climate Policy (since 2 July Ministry of Climate Policy and Green Growth), The Netherlands Ministry of Foreign Affairs, Air Liquide Industrie B.V., BP Nederland, Coöperatieve Centrale Raiffeisen-Boerenleenbank B.A. ('Rabobank'), EBN B.V., Eneco Holding N.V., ENGIE Energie Nederland N.V., Equinor ASA, Esso Nederland B.V., GasTerra B.V., Havenbedrijf Rotterdam N.V., ING Wholesale Banking N.V., Koninklijke Vopak N.V., Nederlandse Aardolie Maatschappij B.V., N.V. Nederlandse Gasunie, Neptune Energy Netherlands B.V., ONE-Dyas B.V., RWE Generation NL B.V., Shell Nederland B.V., TenneT TSO B.V., Uniper Benelux N.V., Vattenfall NL., Wintershall Dea Nederland B.V.

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THE YEAR 2024: ONE SWALLOW DOES NOT MAKE SUMMER

The mild winter of 2023/2024 calmed international natural gas markets. The European countries emerged from the winter with gas storages relatively full and well above previous 5-year averages. According to the Institute for Energy Economics and Financial Analysis, Europe imported 32 bcm less in 2024 than in 2023, a decline of 19%. This will not be replicated in 2025 with storages well below the previous 5-year averages. Potential additional extra demand for gas in 2025 is already forecasted. The colder winter and the longish periods of low wind production at the start of the heating season in 2024 was a stark reminder of the changed EU-gas market. If European storages end the heating season around 35% full, the IEA calculated that an additional 20 bcm needs to be contracted in international markets compared to 2024 to fill the storages to the obliged level. Already summer prices are higher than winter prices and some EU member states are pushing to relax the obligation to fill up the storages for 90% on 1 November of each heating season to reduce market pressures. On 29 March 2025, at the end of the heating season, Dutch gas storages were only 21.3% full. Even though gas prices increased in the course of 2024, and levelled off during the winter, the expectation is that prices will be higher in 2025 than in 2024 due to additional demand and a tight market.

Reduced gas demand in industry in the EU were flagged by the Draghi-report in September 2024 as a signal of industry struggling because of high energy costs. The Draghi-report perils drew urgent attention to the EU industry that is struggling to stay afloat in international markets. The higher energy costs compared to the US and China are one of the larger complaints aired in the report, but also the mounting cost of bureaucracy is hampering the industrial sector to make the energy transition investments. The Netherlands is a leading nation, in energy costs that is, and the industrial investment climate is rapidly reaching sub-zero temperatures due to additional policy measures such as the CO₂ tax and electricity network costs. Dutch industry must grapple with an uneven playing field in the EU and in international markets. This constitutes a very unfavourable investment climate for companies where the foreign owners have more investment options in their portfolio. Energy transition projects awaiting final investment decision are at best delayed. Some companies have announced reviewing some of their European and/or Dutch assets in the portfolio. Gas demand reduction is not so much due to the Green Deal policies providing alternative low carbon energy carriers and power, as often claimed by European politicians, but a signal of declining industrial activity. Many of the investments in hydrogen projects are at best delayed or called off altogether.

The second Von der Leyen European Commission started work on 1 December 2024 with a completely different agenda than the first one. The much-heralded Green Deal of the first term of Von der Leyen is quickly losing some of its shine against the background of the EU industrial loss of competitiveness. The year 2024 may by hindsight show up in our statistics as a year of structural economic change with. Manufacturing and other energy intense industries are struggling to survive. The trade war between the US and China in particular, and the US complaints about a lack of open markets in the EU due to complicated rules and practises may be the next difficulty for industry. The February 2025 omnibus simplification packages may not be enough to stave off trade measures against the EU. Many of the complaints relate to the Green Deal body of policy measures. At the same time, China is struggling with excess capacities in many industrial sectors. These capacities were stimulated with a wide range of different government support mechanisms and are now seeking buyers in international markets. More bad news for European producers.



International oil markets were relatively stable moving between 70 and 85 dollars per barrel. Between April and July prices peaked due to increased geopolitical issues on the route through the Suez Canal but eased off in the fall. Many ships opted to sail around the Cape to avoid the risks of Houthi attacks, despite the military operations, led by the US, tried to guarantee the right of passage. Lower growth of oil demand forced OPEC+ to prolong the production constraints throughout the year. Growth of demand was low due to an economic slowdown in China.

In the Netherlands, a new government started work in the summer with a lower budget for climate change policies and intentions to remove the the additional costs (among which the CO2 tax). In 2024, nothing changed, and with this smaller carrot and continuing large stick Dutch industry is struggling to at least be able to function on an even playing field in the EU.

The high Dutch network costs are another bone of contention. Several studies showed that these costs are much higher in the Netherlands compared to neighbouring countries. Apart from the costs, network bottlenecks are another big issue. Even if industries, or new housing developments for that matter, wish to electrify their production processes, these investments are impossible due to the network capacity constraints. And if the above issues are overcome, nitrogen deposition constraints constitute the next stumbling block. The Netherlands economy is captured by its own chosen policy approach and legislation, which seemed workable twenty years ago to accommodate the various economic activities, but is arresting all sorts of investments now, including those needed for the energy transition. With the country locked into all sorts of legislative dead ends to move forward, investors in industry and other economic activities no longer judge the Netherlands as a prime location for their activities. This is a tragedy because the location of the Netherlands with its prime infrastructure to the hinterland and large potential in the North Sea should be used to launch the economy into the future.

Meanwhile, uncertain times are dawning in the North Sea. In Denmark, a shock was caused in December by the lack of interest in a tender for offshore wind capacity. The Danish government had not offered a firm support scheme. Tenders in the United Kingdom (UK) had already failed one year earlier, in 2023, because the strike price in the Contracts for Difference scheme was set too low compared to the new cost realities in the offshore wind sector. The UK government learned its lesson and increased the strike price for auctions to be held in 2024, resulting eventually in 5 GW of successful tenders later that year. The Dutch government managed to generate just enough interest in developing wind energy at the IJmuiden Ver site, but interest was lower than in previous years and calls for a system like the one in the UK to avoid disappointments like in Denmark grew louder. With an industrial sector in dire straits that may be unable to give demand certainty to electricity or hydrogen developers, the 'demand pull' approach to offshore wind projects risks failing. In 2025 it will probably become clear whether a recalibration of offshore wind and hydrogen policies is required.

How to break the vicious circle in the rapidly changing international political and economic environment? Should the EU and its member states continue the route carved out by the Green Deal or try to find other ways to realise its targets? Is a discussion possible in the EU and/or the member states to change tack and accept the current headwind in stride? The international context of the energy transition, the long period of a hybrid energysystem, and the changing international economic environments are questions that feature in the four-year research plan for the project period 2025 - end of 2028.



BOARD OF THE FOUNDATION: STICHTING FONDS INSTITUUT CIEP (SFIC)



Gertjan Lankhorst, chair



Jeroen van Hoof, treasurer



Joost van Roost, member, until 1-6-2024



Maayke Maas, member



Simon Smits, member



Alice Krekt, member

On 29 December 2021, the Foundation changed its statute and name. This change in statute involved a modernisation and clarification needed for the 'UBO-registration'. The foundation is registered in The Hague. The often-used abbreviation of the foundation 'SFIC' remained intact.

In 2024, the Clingendael International Energy Programme (CIEP) changed its name to Centre for International Energy Policy (CIEP) to underscore its autonomy from the Netherlands Institute of International Relations Clingendael. The new web address is <http://ciep.energy>. CIEP is the single project of Stichting Fonds Instituut CIEP (SFIC) since 1 September 2001. Each CIEP project period lasts four years. 2024 was the final year of the sixth project period running from 1 January 2021 until 31 December 2024. A seventh four-year project period is set to commence on 1 January 2025.

In 2024, the SFIC Board convened to extraordinary meetings in addition to the normal May and November Board meetings. The SFIC Board met on 12 February 2024 to discuss the succession of CIEP Director Coby van der Linde, in view of her retirement later in the year; 15 May 2024 for a regular meeting which included the year account 2023 and year report 2023 as well as a discussion on the start of the 7th project period starting in 2025; 26 August 2024 to discuss the sort of staff and fellow formation that would best fit with the appointed Director ad interim; and on 29 October 2024 to discuss the budget 2025 and further preparations for the 7th project period.



CIEP SUPPORTING INSTITUTIONS

In 2024, the following institutions supported CIEP:

The Netherlands Ministry of Economic Affairs and Climate Policy (Ministry of Climate Policy and Green Growth since 2 July 2024)

The Netherlands Ministry of Foreign Affairs

Air Liquide Industrie B.V.

BP Nederland

Coöperatieve Centrale Raiffeisen-Boerenleenbank B.A. ('Rabobank')

EBN B.V.

Eneco Holding N.V.

ENGIE Energie Nederland N.V.

Equinor ASA

Esso Nederland B.V.

GasTerra B.V.

Havenbedrijf Rotterdam N.V.

ING Wholesale Banking N.V.

Koninklijke Vopak N.V.

Nederlandse Aardolie Maatschappij B.V.

N.V. Nederlandse Gasunie

Neptune Energy Netherlands B.V.

ONE-Dyas B.V.

RWE Generation NL B.V.

Shell Nederland B.V.

TenneT TSO B.V.

Uniper Benelux N.V.

Vattenfall NL








Wintershall Dea Nederland B.V.

These institutions are a cross-section of energy sector stakeholders in the Netherlands and beyond. The companies are major international players in their field of expertise. 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 CIEP brainstorm groups and roundtables.



STAFF

In 2024, the CIEP staff comprised the following employees:

	Coby van der Linde, director, 1.0 fte, until 1 July 2024
	Pier Stapersma, deputy director, 1.0 fte, director a.i. from 1 July 2024
	Roelof Stam, researcher, 1.0 fte
	Ard Verhaar, 1,0 fte
	William Lenoir, 1,0 fte (until 1-10-2023)
	Wendy Auf dem Brinke, office manager, 0.9 fte
	Marco Blankestijn, financial administration, 0.2 fte equi.

Coby van der Linde retired as director of CIEP on 1 July 2024. Deputy director Pier Stapersma was appointed Director ad interim by the SFIC Board as of 1 July 2024. With a view to decades of in-depth experience in the international aspects of the energy system (and the geopolitics of energy markets and relations), Mrs Coby van der Linde joined the team of fellows, so that CIEP and the broader network can continue tap into Mrs Van der Linde's knowledge and experience.




Other functions held by CIEP Director Coby van der Linde in 2024:

- Member of the Supervisory Board of Koole Terminals B.V.
- DBA Lark Holding B.V. and Lark Advisory B.V.

CIEP director a.i. Pier Stapersma (from 1 July 1 2024) did not hold any other positions in 2024.



In addition to the research staff, senior and associate fellows contributed to CIEP's work and network:

	Dick de Jong, Honorary Fellow
	Jacques de Jong, Honorary Fellow
	Maria van der Hoeven, Senior Fellow
	Noe van Hulst, Senior Fellow
	Coby van der Linde, Senior Fellow (since 1 July 2024)
	Bert Roukens, Senior Fellow
	Pieter Boot, Senior Fellow
	Geert Greving, Senior Fellow
	Aad Correljé, Associate Fellow (project basis)
	Martien Visser, Associate Fellow (project basis)
	Luca Franza, Associate Fellow
	Jan Hein Jesse, Associate Fellow (project basis)
	Piet Nienhuis, Associate Fellow (project basis)
	Gert van der Lee, Associate Fellow (project basis)
	Ruud Bos, Associate Fellow (project basis)
	Remko Kruithof, Associate fellow (project basis) (until 17 October 2024)
	Ruprecht Brandis, Associate Fellow (project basis)
	Robert Dencher, Associate Fellow (project basis)

NETWORK

Many of our activities and studies are conducted in cooperation with partner organisations in the Netherlands and abroad. Over time a wide network of researchers has developed. The intensity of contact depends on the projects at hand, but in general many of the contacts continue in other projects. We are also regularly approached to participate in consortia of researchers in which CIEP decides to participate on a case-by-case basis depending on the relevance of the project for the public agenda of that period. The network of energy researchers is global, and each year new partners join the network. Some relations with research and activity partners have become very close and a variety of interactions take place every year, from keeping in touch on current issues to organizing conferences and conducting joint studies. In 2024, webinars were organised with partner organisations such as IAI in Rome, Italy, and IEA in Paris.

INTERNAL ORGANIZATION

CIEP administers the allocation of staff and budgets to the different activities, research projects and other pursuits. CIEP uses time registration, which facilitates prioritizing time and assets.



CIEP PUBLICATIONS

The following overview highlights 2024 publications, which are available on CIEP's website (see ciep.energy/publications). CIEP (associated) staff also published articles elsewhere, which are typically listed under the tab "other work" when we are permitted to post the contribution (see ciep.energy/other_work).

Papers

- Hydrogen policy in the Netherlands - Laying the foundations for a scalable hydrogen value chain, Roelof Stam, January 2024, <https://ciep.energy/publications/publication/hydrogen-policy-in-the-netherlands-laying-the-foundations-for-a-scalable-hydrogen-value-chain>
- The Draghi-report: EU Industry Between a Rock and a Hard Place, Coby van der Linde, November 2024, <https://ciep.energy/publications/publication/CIEP-Discussion-Note-the-draghi-report-eu-industry-between-a-rock-and-a-hard-place>

Other work

- Anatomy of a fall: Europe's deindustrialisation | illuminem, 9 May 2024, Noé van Hulst, <https://illuminem.com/illuminemvoices/anatomy-of-a-fall-europes-deindustrialisation>
- "Hydrogen Policy in the Netherlands: Laying the Foundations for a Scalable Hydrogen Value Chain", Roelof Stam, Coby van der Linde, and Pier Stapersma, in "The Geopolitics of Hydrogen", Volume 1: European Strategies in Global Perspective, Rainer Quitzow, Yana Zabanova (eds.), Springer Cham, 2024
- The natural resources trap is alive and kicking | illuminem, 17 July 2024, Noé van Hulst, <https://illuminem.com/illuminemvoices/the-natural-resources-trap-is-alive-and-kicking>
- Slide-pack A brief introduction to Draghi's report on: The future of European competitiveness by CIEP Researcher Roelof Stam (posted 8 November 2024), https://ciep.energy/other_work/presentations
- Electrons for peace | illuminem, 14 November 2024, Noé van Hulst, <https://illuminem.com/illuminemvoices/electrons-for-peace>

Columns

- The 2023 columns of Coby van der Linde, Martien Visser, Pieter Boot en Aad Correljé appeared on the Energieforum website (www.energiepodium.nl). Some can also be found on the CIEP website (ciep.energy/columns).

EVENTS/ACTIVITIES

CIEP organized three online events and three in person events in 2024 (see also ciep.energy/events):

- | | |
|------------|--|
| 26 January | Presentation of the IEA Quarterly Gas Report Q1-2024 -- jointly with the Istituto Affari Internazionali (IAI), in cooperation with the International Energy Agency (IEA) |
| 22 March | Discussie noodzakelijk bijdrage van biogas aan de Nederlandse bijmengverplichting en de 2030 doelstellingen |
| 26 April | Presentation of the IEA Quarterly Gas Report Q2-2024 and the Northwest European Hydrogen Monitor -- jointly with the Istituto Affari Internazionali (IAI), in cooperation with the International Energy Agency (IEA) |
| 11 Juni | Seminar and reception in Louwman Museum in The Hague in the context of the retirement of Mrs. Coby v/d Linde from her position as Director of CIEP |



- | | |
|-------------|--|
| 19 July | Presentation of the IEA Quarterly Gas Report Q3-2024 -- jointly with the Istituto Affari Internazionali (IAI), in cooperation with the International Energy Agency (IEA) |
| 11 October | Webinar on IEA Gas Security Review 2024 -- jointly with the Istituto Affari Internazionali (IAI), in cooperation with the International Energy Agency (IEA) |
| 10 December | Presentation IEA World Energy Outlook 2024 by Tim Gould in The Hague |



TRAINING

Luca Franza and Coby van der Linde taught the Course 'International and European Gas Markets' in the Energy Master Programme of SciencesPo in Paris in 2024-Q1.

Pier Stapersma taught in the Course 'Leadership in National Security' (Leergang Leiderschap in Nationale Veiligheid, LNV) by the Ministry of Defense (Instituut Defensie Leergangen, Nederlandse Defensie Academie, Ministerie van Defensie) in June 2024.

Pier Stapersma taught in the Course 'Shiraka / Energy Transition' in August 2024 (organised by the Netherlands Institute of International Relations Clingendael).

Pier Stapersma taught in 'Leergang Buitenlandse Betrekkingen' (Course International Relations) (organised by the Netherlands Institute of International Relations Clingendael).

CIEP staff regularly contribute to (online) training programs for government officials, diplomats, staff of international organizations and energy professionals, organized by Erasmus University-UPT, Energy Academy, The Netherlands Institute for International Relations Clingendael, and Energy Delta Institute (EDI), among others.

CIEP MEETINGS

BOARD STICHTING FONDS INSTITUUT CIEP

12 February 2024
15 May 2024
26 August 2024
29 October 2024

ADVISORY BOARD

11 June 2024
10 December 2024

CONTACT GROUP

22 March 2024
5 June 2024
10 September 2024
3 December 2024



LECTURES, SPEECHES, PRESENTATIONS, MEDIA

During 2024, CIEP staff participated in various expert meetings and project meetings. In addition, CIEP staff members gave numerous lectures, speeches, and presentations or chaired sessions during training courses, conferences, and seminars in 2024. CIEP staff in 2024 also gave various radio, television, and written media interviews and provided background information to journalists.

MEETINGS AND EXTERNAL REPRESENTATION 2024

January

VNO/NCW oil work stream (Coby van der Linde)

Participation in Netbeheer Nederland event 'Nederland in Transitie 2024: Van visie naar Actie in de Energietransitie' (The Netherlands in Transition 2024: From Vision to Action in the Energy Transition) (Pier Stapersma)

February

Guest lecture 'Relaunching Ammonia' in the Sciences Po Course 'International Natural Gas Markets and the Role of Clean Gases in the Energy Transition' (Roelof Stam)

VNO/NCW oil work stream (Coby van der Linde)

Online knowledge session SHIP>NL, presentation 'Relaunching Ammonia' (Roelof Stam)

March

Meeting on the future of refining, Ministry of Economic Affairs and Climate Policy (Coby van der Linde)

Participation in online Auriga session 'Decarbonizing EU Maritime Fuel Mix using RFNBOS' (Roelof Stam)

Chairing the UK-NL Energy Roundtable at British Residence (chairing by Coby van der Linde; participation of Roelof Stam and Pier Stapersma)

Circular Industry Talks Leiden University, presentation 'Relaunching ammonia' (Roelof Stam)

VNO/NCW oil work stream (Coby van der Linde)

Participation in Energiepodium Debate in Nieuwspoor (Ard Verhaar)

April



Online Auriga session, presentation 'Relaunching Ammonia' (Roelof Stam)

World Energy Congress 2024, Rotterdam, by World Energy Council (WEC), chairing and participation in panel (Coby van der Linde)

Participation in Launch Event 'Neptune Poshyoon', Almar (Coby van der Linde)

Participation in Smartport Launch Event of Haven Innovatie Barometer (Port Innovation Barometer) in Rotterdam (Pier Stapersma)

Security of (Energy) Supply meeting, Ministry of Economic Affairs and Climate Policy (Coby van der Linde)

Participation in online knowledge session SHIP>NL, (Roelof Stam)

Participation in Annual Erasmus Commodity & Trade Centre Event (Roelof Stam)

May

Participation in discussion/dinner Nobian (Coby van der Linde)

Participation in Rabobank Energy Transition Event (Pier Stapersma)

Consulted in questionnaire on hydrogen by Gasunie (Pier Stapersma)

June

Book presentation 'Het Droomland' by Remco de Boer, stage guest and interview (Coby van der Linde)

Meeting and introduction to The Netherlands Scientific Climate Council, in Dutch 'Wetenschappelijke Klimaatraad' (WKR) (Pier Stapersma)

Seminar and Reception, retirement Frans Rooijers (CE Delft) (Coby van der Linde)

Participation in Dutch German Future Industry Forum, in Rotterdam (Pier Stapersma)

King's Birthday Party, British Embassy in the Hague (Pier Stapersma)

Participation in online knowledge session SHIP>NL, (Roelof Stam)

Vemobin Annual Diner (Pier Stapersma)

Video interview for NAM (Coby van der Linde)

July



European Economic & Social Committee, preliminary debate on TEN/837, The future of the supply and pricing of electricity in the EU, Presentation (Pier Stapersma)

Reception Erik Klooster goodbye, Vemobin (Pier Stapersma)

Podcast 'Studio Energie' by Remco de Boer, guest and interview (Coby van der Linde)

France National Day celebration, Embassy of France in The Hague (Pier Stapersma)

Diner Pensant hosted by BP on the role of ammonia in the energy transition (Pier Stapersma)

Participation in online knowledge session SHIP>NL, (Roelof Stam)

August

September

Participation in Tennet Energy Booster event (Roelof Stam)

Feedback session to World Energy Council (WEC) ('what role for WEC Netherlands in the Energy Transition (Pier Stapersma)

Participation in online knowledge session SHIP>NL, (Roelof Stam)

October

TNO facilitated discussion (two distinct sessions) on Hydrogen Import Cost (Roelof Stam)

Meeting with Economic Officer US Embassy in The Hague (Pier Stapersma)

Breakfast meeting about oil at the Ministry of Climate Policy and Green Growth (Coby van der Linde)

November

Symposium "Weather and War - Climate and Conflict" by NVBM (Nederlandse Vereniging ter Bevordering van Meteorology), presentation (Coby van der Linde)

Participation in Smartport Summit 2024 'Water & the Port' (Roelof Stam) (Pier Stapersma)

Participation in 'Gas Talks' (Gasgesprekken) event by ElementNL (Pier Stapersma)



VNO/NCW oil work stream (Coby van der Linde)

Participation in online knowledge session SHIP>NL, (Roelof Stam)

22nd Erasmus-Descartes Conference, hosted by the Dutch embassy in France and the French embassy in the Netherlands, presentation/speech (Pier Stapersma)

December

Participation in online knowledge session SHIP>NL, (Roelof Stam)

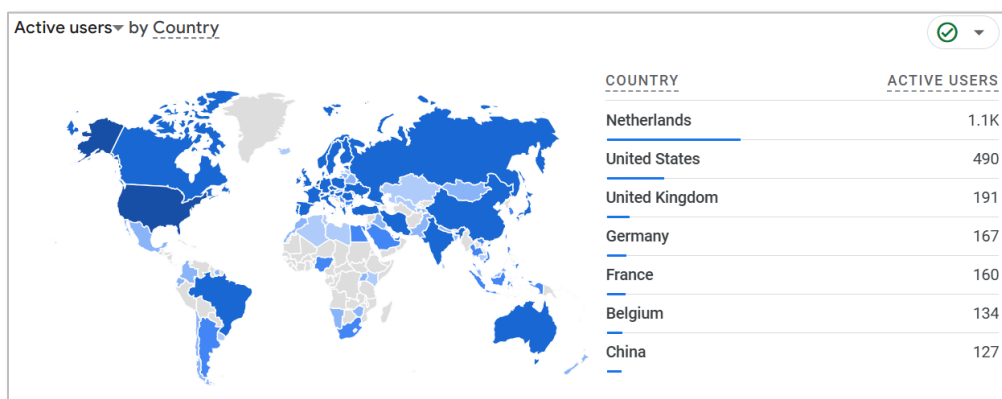
Participation in National Hydrogen Programme (Nationaal waterstof programma) event (Roelof Stam)

WEBSITE

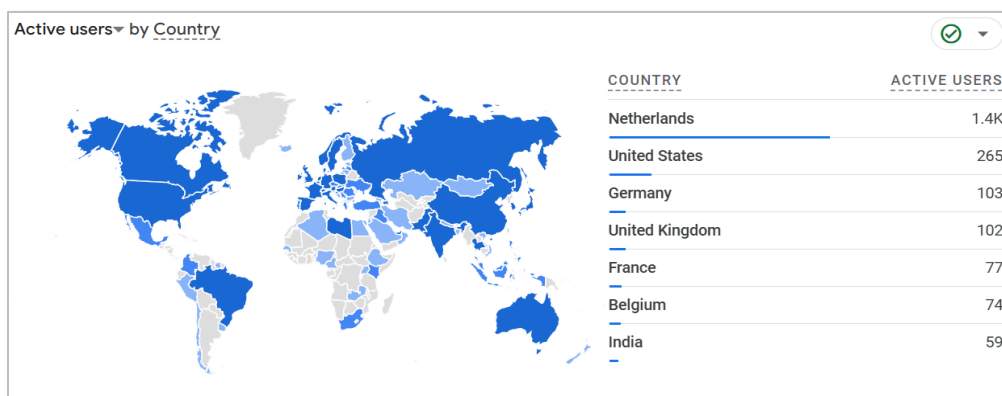
Everything CIEP published or organised from 2001 onwards, can be found at the website. The world wide web is an important communication and information dissemination tool for CIEP. With the name change of CIEP in 2024, the new web domain ciep.energy was chosen. The previously used web address now redirects visitors to the new web domain, so that references to CIEP research in the many existing publications by third parties continue to work. Also a new Google Analytics environment was put in place. For this reason, the analysis of the visitors to the CIEP website consists of Google Analytics of the old domain in the first period of the year and of the new domain in the second period.

GEOGRAPHICAL DISTRIBUTION WEBSITE VISITORS

19 June 2024 – 31 December 2024:



1 Jan 2024 – 18 June 2024:



WEBSITE PUBLICATIONS

19 June 2024 – 31 December 2024:

Page path and screen class		↓ Views	Active users
		-----	-----
Total		1,758 100% of total	891 100% of total
1	/publications/publication/CIEP-Discussion-Note-the-draghi-report-eu-industry-between-a-rock-and-a-hard-place	280 (15.93%)	173 (19.42%)
2	/publications/publication/prospects-for-sustainable-diversification-of-the-eus-gas-supply	185 (10.52%)	157 (17.62%)
3	/publications/publication/from-dutch-disease-to-energy-transition	145 (8.25%)	100 (11.22%)
4	/publications/publication/relaunching-ammonia-from-fertilizer-to-energy-in-northwest-europe	130 (7.39%)	77 (8.64%)
5	/publications/publication/hydrogen-policy-in-the-netherlands-laying-the-foundations-for-a-scalable-hydrogen-value-chain	129 (7.34%)	94 (10.55%)
6	/publications/publication/the-netherlands-as-a-future-hydrogen-hub-for-northwest-europe	85 (4.84%)	60 (6.73%)
7	/publications/publication/getting-ready-to-take-stock-of-the-global-energy-transition	77 (4.38%)	40 (4.49%)
8	/publications/publication/the-european-refining-sector-a-diversity-of-markets	77 (4.38%)	55 (6.17%)
9	/publications/publication/recarbonizing-the-chemical-industry	76 (4.32%)	58 (6.51%)
10	/publications/publication/the-impact-of-eu-oil-sanctions-on-crude-oil-and-oil-product-markets-in-the-netherlands-and-its-relevant-markets	56 (3.19%)	31 (3.48%)

1 Jan 2024 – 18 June 2024:

Page title and screen class		↓ Views	Active users
		-----	-----
Total		1,797 100% of total	845 100% of total
1	Relaunching Ammonia From Fertilizer to Energy Carrier in Northwest Europe - CIEP	441 (24.54%)	232 (27.46%)
2	Hydrogen policy in the Netherlands - Laying the foundations for a scalable hydrogen value chain - CIEP	253 (14.08%)	158 (18.7%)
3	From Dutch Disease to Energy Transition - CIEP	154 (8.57%)	111 (13.14%)
4	Hydrogen To Be - Geopolitical and Social Implications of Emerging Low-Carbon Hydrogen Trade and Supply Networks in the ARRRR Supercluster - CIEP	103 (5.73%)	75 (8.88%)
5	The Netherlands as a Future Hydrogen Hub for Northwest Europe - CIEP	71 (3.95%)	58 (6.86%)
6	The European Refining Sector: A Diversity of Markets? - CIEP	61 (3.39%)	45 (5.33%)
7	Recarbonizing the Chemical Industry - CIEP	59 (3.28%)	40 (4.73%)
8	Getting Ready to Take Stock of the Global Energy Transition - CIEP	50 (2.78%)	43 (5.09%)
9	The impact of EU oil sanctions on crude oil and oil product markets in the Netherlands and its relevant markets - CIEP	45 (2.5%)	27 (3.2%)
10	Prospects for Sustainable Diversification of the EU's Gas Supply - CIEP	38 (2.11%)	35 (4.14%)

ALL SUBSITES:

19 June 2024 – 31 December 2024:

	Page title and screen class ▾	+	↓ Views	Active users
	Total		10,950 100% of total	3,403 100% of total
1	Centre for International Energy Policy		3,786 (34.58%)	1,835 (53.92%)
2	Webinar on IEA Gas Security Review 2024 - CIEP		1,105 (10.09%)	665 (19.54%)
3	Publications - CIEP		935 (8.54%)	382 (11.23%)
4	About us - CIEP		731 (6.68%)	442 (12.99%)
5	Staff - CIEP		382 (3.49%)	261 (7.67%)
6	Events - CIEP		286 (2.61%)	167 (4.91%)
7	The Draghi-report: EU Industry Between a Rock and a Hard Place - CIEP		284 (2.59%)	173 (5.08%)
8	Vacancies - CIEP		245 (2.24%)	178 (5.23%)
9	Contact - CIEP		240 (2.19%)	171 (5.02%)
10	Prospects for Sustainable Diversification of the EU's Gas Supply - CIEP		185 (1.69%)	157 (4.61%)

1 Jan 2024 – 18 June 2024:

	Page title and screen class ▾	+	↓ Views	Active users
	Total		8,199 100% of total	2,499 100% of total
1	Clingendael International Energy Programme		2,881 (35.14%)	1,465 (58.62%)
2	Publications - CIEP		847 (10.33%)	362 (14.49%)
3	Relaunching Ammonia From Fertilizer to Energy Carrier in Northwest Europe - CIEP		441 (5.38%)	232 (9.28%)
4	About us - CIEP		419 (5.11%)	280 (11.2%)
5	Events - CIEP		331 (4.04%)	124 (4.96%)
6	Staff - CIEP		324 (3.95%)	204 (8.16%)
7	Hydrogen policy in the Netherlands - Laying the foundations for a scalable hydrogen value chain - CIEP		253 (3.09%)	158 (6.32%)
8	Discussie noodzakelijk bijdrage van biogas aan de Nederlandse bijmengverplichting en de 2030 doelstellingen - CIEP		206 (2.51%)	145 (5.8%)
9	From Dutch Disease to Energy Transition - CIEP		154 (1.88%)	111 (4.44%)
10	Vacancies - CIEP		143 (1.74%)	127 (5.08%)



PROJECTS

In 2024, we started working on two substantial projects, both to be completed in 2025. In 2024, work began on an anniversary book on 30 years of energy policy commissioned by the Ministry of Climate and Green Growth. In addition, a project studying the prospects for trans-Atlantic low-carbon ammonia trade has begun in collaboration with the Erasmus Commodity and Trading Centre (ECTC) (part of Erasmus University Rotterdam) commissioned by SmartPort (a neutral knowledge platform, stimulating alliances, financing scientific research and provides public knowledge dissemination). Smaller projects include most notable trainings/lectures.

FINANCES

2024 was the fourth year of the sixth project period (1-1-2021 to 31-12-2024).

The overall financial result for 2024 was -119.484 euro.

	2024	2023
Contribution stakeholders	€ 600.000	€ 600.000
Project Income	€ 31.364	€ 38.457
Other income or cost	€ 12.350	€ 5.823
Staff Cost	€ -607.597	€ -563.546
Deprecation cost	€ -9.218	€ -9.525
Public activity costs	€ -39.662	€ -37.336
Project activity costs	€ -957	€ 0
Foundation costs	€ -105.765	€ -156.122
Profit taxes	€ 0	€ 0
Total Result	€ -119.484	€ -122.249
Liquidity	€ 871.295	€ 1.045.749
Foundation Capital (CIEP)		
CIEP-reserves	€ 872.684	€ 992.168
Destination Public Reserves	€ 0	€ 0



ANNEX 1 ABOUT CIEP

INTRODUCTION

In September 2001, the CIEP was founded under the Foundation SFIC. 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 SFIC and seventeen participating institutions. In 2024, the existing name Clingendael International Energy Programme (CIEP) was replaced by Centre for International Energy Policy (CIEP) to underscore CIEP's independence.

The main reasons for initiating CIEP were:

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

MISSION

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

OBJECTIVES

- To serve as an independent forum for governments, non-governmental organizations, 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 based on research, supported by a documentation system.
- To propagate information and knowledge about international political and economic developments in the energy sector and energy transition by means of seminars, conferences, lectures, courses, publications, and information releases via the media.
- To initiate discussions about current events and future developments relevant to the energy sector, energy policy, legislation and the relationship between the government and the private sector.



RESEARCH AND ACTIVITIES

CIEP's research and activities focus on energy markets (oil, gas, renewables and electricity) and policymaking in the European Union and geopolitics of international energy policymaking and markets.

