



> Retouradres Postbus 20101 2500 EC Den Haag

Stichting Gasalarm 2  
t.a.v. dhr. R. Lindhout  
Sluislaan 3  
1861 PG Bergen NH

**Directoraat-generaal voor  
Energie, Telecom en Markten**  
Directie Energiemarkt

**Bezoekadres**  
Bezuidenhoutseweg 30  
2594 AV Den Haag

**Postadres**  
Postbus 20101  
2500 EC Den Haag

**Factuuradres**  
Postbus 16180  
2500 BD Den Haag

T 070 379 8911 (algemeen)  
[www.rijksoverheid.nl/ez](http://www.rijksoverheid.nl/ez)

**Behandeld door**  
dhr. drs. E. Janssen

T 070 379 7281  
F 070 379 8267  
[e.janssen@minez.nl](mailto:e.janssen@minez.nl)

**Ons kenmerk**  
ETM/EM / 10091703

**Uw kenmerk**

**Bijlage(n)**

1

Datum - 30 JUNI 2010 -

Betreft Uw Wob-verzoek betreffende rentabiliteit Gasrotonde

Geachte heer Lindhout,

Op 7 juni 2010 heeft u mij op grond van de Wet openbaarheid van bestuur (hierna: Wob) verzocht om informatie betreffende de vragen die het Ministerie van Economische Zaken gesteld heeft aan de Brattle Group in verband met de rentabiliteit van het plan Gasrotonde.

Op grond van artikel 3, eerste lid, van de Wob kan een ieder een verzoek om informatie neergelegd in documenten over een bestuurlijke aangelegenheid richten tot een bestuursorgaan. Artikel 3, vijfde lid, van de Wob bepaalt dat een verzoek om informatie wordt ingewilligd met inachtneming van het bepaalde in artikelen 10 en 11 van de Wob. Een bestuursorgaan zal het verstrekken van de gevraagde informatie achterwege kunnen dan wel moeten laten wanneer zich één of meer van de in artikelen 10 en 11 van de Wob genoemde uitzonderingsgronden en beperkingen voordoen.

Met inachtneming van de Wob overweeg ik het volgende.

Op mijn ministerie is één stuk aanwezig waarop uw verzoek van toepassing is, te weten een brief met een offerteaanvraag voor een studie naar de economische onderbouwing van de gasrotonde aan Brattle Group. Dit document wordt openbaar gemaakt, met dien verstande dat de namen van de betrokken ambtenaren zijn weggelakt.

Op grond van artikel 10, tweede lid, aanhef en onder e, van de Wob blijft openbaarmaking van de namen van betrokken ambtenaren namelijk achterwege, omdat het belang daarvan niet opweegt tegen het belang van de eerbiediging van de persoonlijke levenssfeer.

Een kopie van het document is als bijlage bij dit besluit gevoegd.

De door u gevraagde informatie is na toezending tevens in te zien op de website [www.rijksoverheid.nl](http://www.rijksoverheid.nl)

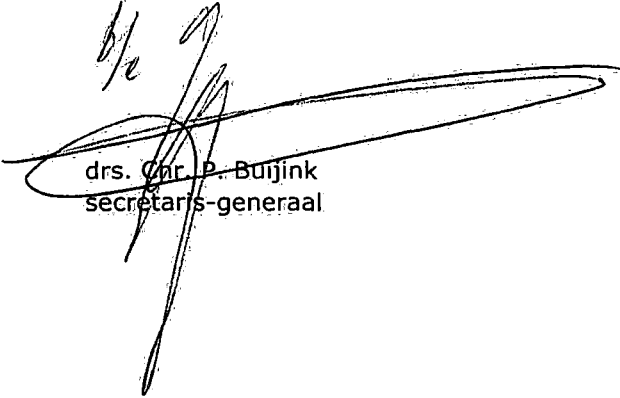


**Directoraat-generaal voor  
Energie, Telecom en Markten**  
Directie Energiemarkt

**Ons kenmerk**  
ETM/EM / 10091703

De Minister van Economische Zaken,  
namens deze:

b/e



drs. Chr. P. Buijink  
secretaris-generaal

Tegen dit besluit kan degene wiens belang rechtstreeks bij dit besluit is betrokken binnen 6 weken na de dag van verzending van dit besluit een gemotiveerd bezwaarschrift indienen bij de Minister van Economische Zaken, directie Wetgeving en Juridische Zaken, ALP L/204, Postbus 20101, 2500 EC 's-Gravenhage.

Dit besluit is verzonden op de in de aanhef van deze brief vermelde datum.



Ministry of Economic Affairs

> P.O. Box 20101 2500 EC Den Haag The Netherlands

The Brattle Group Limited

Halton House  
20-23 Holborn  
London EC1N 2JD, United Kingdom

Directorate General for  
Energy and Telecom  
Energy Market Directorate

Visit address  
Bezuidenhoutseweg,30  
2500 EC Den Haag  
The Netherlands

Postal address  
P.O. Box 20101  
2500 EC Den Haag  
The Netherlands

Billing address  
P.O. Box 16180  
2500 BD Den Haag  
The Netherlands

T +31 (0)70 379 8911  
www.ez.nl

Dealt with by

Date 24 FEB. 2010

Re Request for an offer for an Economic Study on Dutch Gas Sector

Dear

I hereby invite you to issue an offer for a study on the Dutch gas sector. The study should analyse the current situation of the sector, contain a SWOT analysis and analyse the economic contribution of the Gas Hub strategy as intended by the Minister of Economic Affairs.

Our ref.  
ET/EM / 10031417  
Your ref.

Encl.  
1

*Origin and background*

Recently the Minister of Economic Affairs of the Netherlands, Maria van der Hoeven, sent a national paper to the House of Representatives regarding the Netherlands as Gas Hub for Northwest Europe. The paper is enclosed in English.

The Netherlands has rich resources of natural gas at its disposal. Almost as a matter of course, our country has become a major user of gas as well as an important supplier of gas in Northwest Europe.

The government realizes that the important role of the Netherlands in the Northwest European gas market cannot be taken for granted in the future. The Netherlands wants to maintain this position despite the diminishing domestic production and the fact that it will become a net importer around 2025. The cabinet's ambition for the Netherlands is to take on a pivotal position in the international gas stream, and to become the distribution centre of the Northwest European market.

The Gas Hub Strategy is an important part of the efforts of the Dutch government to ensure security in energy supply and to create economic opportunities in and outside the gas sector. In the government's vision this would also strengthen the home market,

because an increasing number of players increases the choice for end users. The government believes that the strategy will create thousands of jobs on an annual basis and provide substantial positive spin-off effects in terms of innovation and economic activities.

In the same paper a number of competitive advantages are mentioned that the Netherlands has and that may allow it to play a pivotal role in the Northwest European Gas Hub. This, however, will require major investments related to these three needs:

1. The need for more transport capacity:
  - Major investment will be required in the coming years to expand the gas transport network.
  - The demand for national and cross-border transport capacity will increase as a result of the increasing need for imported gas, the further internationalization of the gas market and the rise of LNG.
2. The need for flexibility:
  - Because the capabilities of flexible production of the Netherlands are decreasing, substantial investments in gas storage are required to meet fluctuating seasonal demand for gas in the long term.
3. The need for diversification:
  - A crucial dimension of the strategy to prevent us from becoming dependent on one type of energy, country or company.

The Gas Hub can be placed in the context of the government's policy to promote an efficient and transparent gas market. The Netherlands must aim for a situation in which there is:

- I. substantial domestic and foreign investment in the gas sector and in the infrastructure of the Netherlands, which would make it possible to attract gas flows to meet domestic demand for gas, as well as to create value from the transit of gas via the Netherlands;
- II. sufficient gas storage capacity, which both guarantees security of supply and ensures the degree of supply flexibility required for a properly functioning market;

Directorate General for  
Energy and Telecom  
Energy Market Directorate

Our ref.  
ET/EM / 10031417

- III. a liquefied gas market with a sufficient supply at transparent and stable prices;
- IV. a mixed portfolio of gas involving domestic supply, gas from various other countries and green gas, which together help the Netherlands to avoid becoming dependent on a single supplier or source;
- V. a strong and innovative gas industry making a substantial contribution to the economy, creating employment and ensuring that the Netherlands will continue to fulfil its current, unique position as a gas supplying country.

In this context, the Ministry of Economic Affairs would like to obtain a better understanding of the potential of the Netherlands to become the Gas Hub of Northwest-Europe and the contribution that this would give to the Dutch economy.

*Description of mandate and products*

Therefore the Ministry of Economic Affairs is asking you to involve your research experiences with sector studies and SWOT analyses in the area of energy/gas issues and issue an offer for performing this study.

The study should consist of three different parts:

- A. An overview of the current situation of the Dutch gas sector;
- B. A SWOT analysis of the Dutch gas sector related to its neighbouring countries and other energy sources and the government's ambition of becoming the Gas Hub of Northwest Europe.
- C. The expected short-term and long-term economic effects of the development of the Netherlands as the Gas Hub of Northwest Europe.

Ad A.

- i. Analyse the role of gas and the gas sector for the Dutch economy. What does it contribute in terms of security of energy supply, jobs and economic activities? What are the spin-off effects of a strong gas sector to other sectors in terms of employment, profits and the Dutch investment climate?

- ii. Analyse the Dutch gas sector in terms of investments made in the various parts<sup>1</sup> of the gas sector.

Ad B.

- i. Perform a SWOT analysis on the Dutch ambitions of becoming the Gas Hub of Northwest-Europe. Relate this to the competition with neighbouring hubs.  
Germany, Belgium and Austria aim to become gas hubs as well. The developments in Germany took off very rapidly and the market seems to grow faster than the market in the Netherlands. Could the Dutch ambitions be taken over by the developments in Germany? Will the various gas hubs in Northwest-Europe compete with each other or are they complementary?  
Also relate the SWOT to the competition with other energy sources. What will be the role of gas in the future energy mix?
- ii. How do the elements of an example SWOT written below relate to the situation the government aims for as mentioned above.

---

<sup>1</sup> In our view the gas sector consists of the following parts: exploration & production, transport, storage, trading activities, LNG and knowledge & innovation.

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>- Extensive (domestic) transport network</li> <li>- Indigenous production</li> <li>- Large gas sector</li> <li>- High level of gas knowledge</li> <li>- Geographical centre of economic activities</li> <li>- Options for underground gas storage</li> <li>- Etc.</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>- Little cross-border capacity</li> <li>- Small domestic market compared with Germany and UK</li> <li>- Little regional market integration</li> <li>- Etc.</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>- Growth of TTF/ trading activities</li> <li>- Expanding small fields policy</li> <li>- Gas as an enabler of renewable energy mix</li> <li>- Increase of unconventional gas/ LNG</li> <li>- Etc.</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>- Decreasing domestic production/ flexibility</li> <li>- Ambitions of neighbouring countries for becoming a Gas Hub</li> <li>- Gas only used as a transition fuel</li> <li>- Increase of unconventional gas/ LNG could import needs from neighbouring countries</li> <li>- Etc.</li> </ul>

**Ad C.**

Analyse the effects of the Gas Hub related to:

- i. contributions to security of supply and required flexibility;
- ii. contribution to GDP and creation of jobs;
- iii. investments in the gas chain;
- iv. the effects on the functioning of the gas market and formation of gas prices;
- v. the internationalization of the gas sector and market integration;
- vi. the innovative level of the gas sector;
- vii. the spin-off effects to other key economic sectors for the Netherlands.

Your offer should address the following:

- a description of the structure, questions, method, actors to be approached;
- deployment of manpower, etc.;
- a research plan with a critical timeline;
- a guarantee of the independence of the study;
- a guarantee of the legibility of the final report;
- a documented budget, including the number of hours per research to be deployed;
- the price of the study;
- CVs of the researchers, with specific attention to the functioning of the Dutch and European gas market, and knowledge of gas market systems.

The study must be finished by 30 Augustus 2010 and we would like to receive a first draft of the final report on 28 June and a second draft 12 July at the latest. Please present an offer in quintuplicate to the undersigned by 15 March. I am aiming to complete the decision-making process on granting the mandate by 12 April. Further we will plan some temporary evaluation sessions to monitor the progress of the study.

I will evaluate the offer received on:

- the degree to which the structure of the study corresponds to the issue;
- the work schedule;
- the experience and knowledge of the researchers to be involved;
- the price and justification thereof in relation to what is offered (cost/benefit).

The Ministry of Economic Affairs' contacts for this study are [redacted] and [redacted]

The provided information must be treated as confidential and can therefore only be made available to third parties after consultation with the above contacts. It is intended that the final report will be published by the Ministry of Economic Affairs.



Directorate General for  
Energy and Telecom  
Energy Market Directorate

Our ref.  
ET/EM/ 10031417

No rights may be derived from this request for the granting of a  
mandate or compensation of the cost of an offer.

I look forward to your response.



> Retouradres Postbus 20101 2500 EC Den Haag

**Directoraat-generaal voor  
Energie, Telecom en Markten**  
Directie Energiemarkt

Bezuidenhoutseweg 30  
Postbus 20101  
2500 EC Den Haag  
T 070 379 8911 (algemeen)  
www.rijksoverheid.nl/ez

**Behandeld door**  
dhr. drs. E. Janssen *ezb*

**Aanleverpunt**  
A/562

T 070 379 7281  
F 070 379 8267  
e.janssen@minez.nl

# minute

Datum 23 juni 2010

Betreft Uw Wob-verzoek betreffende rentabiliteit Gasrotonde

**Ons kenmerk**  
ETM/EM / 10091703

**Uw kenmerk**

Paraaf  
drs. J.C. de Groot  
Directeur Energiemarkt

Paraaf

Paraaf

Medeparaaf  
Mw. Mr. E. Simon  
Plv. hoofd Juridisch Advies WJZ  
*akk. p. email*

Medeparaaf  
Dhr. I. Nijhuis  
Directeur Communicatie

Medeparaaf

**Informatiekopie aan**  
DGETM J.A.Vijlbrief  
Archief  
(BBR) R. Habieb-Bhikie  
(WJZ) F. Stein  
(DGETM) D. Voskuil, R. Pinto  
Scholtbach, H. Brouwer  
**Bijlage(n)**  
1

Verzendwijze: Per post

Brieftekst op de volgende pagina

Ontvangen BBR

Ontvangen Postkamer

Datum verzending

Paraaf Postkamer

- 30 JUNI 2010 -

- 30 JUNI 2010 -