



# The Upstream Oil and Gas Industry in The Netherlands

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# IRO

(Industriële Raad voor Olie & gas)

- **Founded in 1971**
- **Association of supply and service companies**
- **Upstream oil and gas industry  
(exploration & production)**
- **Onshore & offshore operations**
- **Independent & non-commercial**
- **350 member companies**



## MAIN ACTIVITIES OF MEMBERS:

- Manufacturing & supply of equipment
- Contracting, transport & installation
- Shipbuilding & fabrication
- Engineering & consultancy
- Research & development
- Health, safety & environment
- Training & education



## IRO ACTIVITIES:

- Political support
- Export promotion
- Innovative technology
- Education & employment
- Information services
- Networking



## POLITICAL SUPPORT:

**Lobby in The Hague (NL) & Brussels (EU):**

- **Legislation / rules / regulations**
- **Labor conditions**
- **Health, safety & environment**
- **Fiscal matters & social security**
- **Support of innovative technology**



## EXPORT PROMOTION:

- International trade fairs & exhibitions
- Trade missions (incoming & outgoing)
- Conferences & seminars
- Matchmaking
- Market surveys & reports
- Information & documentation



## INNOVATIVE TECHNOLOGY:

- Information & promotion
- Research & development
- Sponsoring & subsidies (Senter Novem)



## EDUCATION & EMPLOYMENT

- Information & counseling
- Technical colleges and universities
- Training on the job
- Job vacancies
- Career planning
- Training courses & seminars



## INFORMATION SERVICES:

- Documentation & information center
- Netherlands Oil & Gas Catalogue
- Website ([www.iro.nl](http://www.iro.nl))
- IRO Newsletter
- Market reports
- “Offshore Visie” magazine
- Training courses & seminars



## NETWORKING:

- Monthly member meetings
- Conferences, seminars, workshops
- Matchmaking
- International alliances (Euronet)
- Social events



# UPSTREAM OIL AND GAS SUPPLY & SERVICE INDUSTRY IN THE NETHERLANDS (2007)

**TURNOVER : €5.000.000.000**

**ADDED VALUE : €2.250.000.000**

**EMPLOYMENT : 19.340 (direct) + 13.600 (indirect)**



# OIL AND GAS PRODUCTION

(approximate figures 2007)

	<u>OIL</u>	<u>GAS</u>
<b>WORLD</b>	<b>29.760 Mb</b>	<b>2.940 Bm<sup>3</sup></b>
<b>NETHERLANDS</b>	<b>16 Mb</b>	<b>68 Bm<sup>3</sup></b>
<b>UNITED KINGDOM</b>	<b>600 Mb</b>	<b>72 Bm<sup>3</sup></b>
<b>DENMARK</b>	<b>113 Mb</b>	<b>9 Bm<sup>3</sup></b>

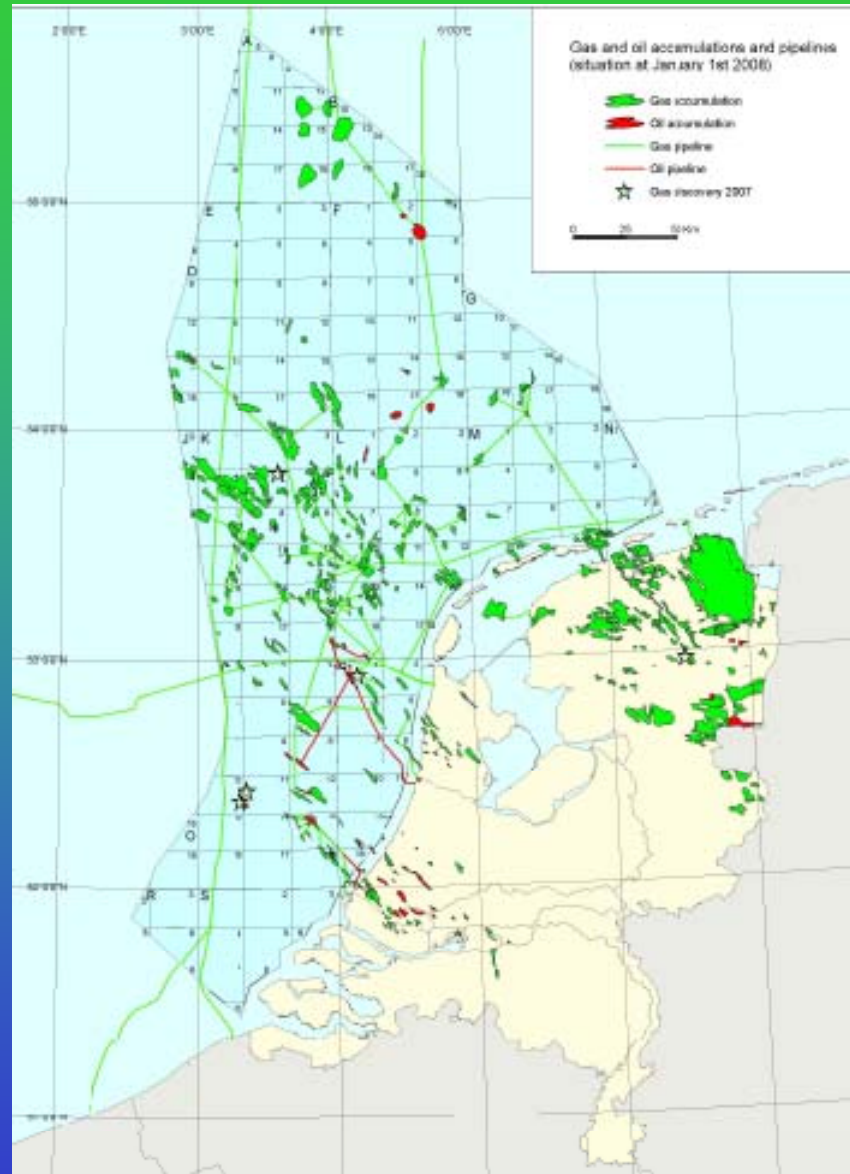


## NATURAL GAS IN THE NETHERLANDS:

**RESERVES (per 1-1-2008):**

**1.390 Bm<sup>3</sup> + FUTURES: 380 Bm<sup>3</sup>**

**STATE REVENUES: €9.200.000.000 (in 2007)**





## RECENT DEVELOPMENTS:

- MARGINAL FIELDS POLICY / FISCAL MEASURES
- GAS PRODUCTION IN THE WADDENZEE (2007)
- RE-OPENING OF THE SCHOONEBEEK OILFIELD (2010)
- SPLIT-UP OF GASUNIE
- GAS HUB OF WESTERN EUROPE



## GASUNIE:

**OPERATOR OF THE MAIN GAS DISTRIBUTION NETWORK (PIPELINES) IN THE NETHERLANDS (100% OWNED BY THE STATE OF THE NETHERLANDS)**

## GASTERRA:

**RESPONSIBLE FOR TRADING OF MOST NATURAL GAS IN THE NETHERLANDS  
SHAREHOLDERS:**

- **10% - STATE OF THE NETHERLANDS**
- **40% - EBN (STATE OWNED)**
- **50% - NAM (SHELL + EXXON)**



## GAS HUB OF WESTERN EUROPE:

- Existing infrastructure
- BBL (Balgzand Bacton Pipeline)
- Nord Stream (9% Gasunie)
- Norway to Germany
- LNG Terminals (4x)
- Underground storage



## OPERATORS IN THE NETHERLANDS: (Members of NOGEPA)





**Q & A**



# IRO

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