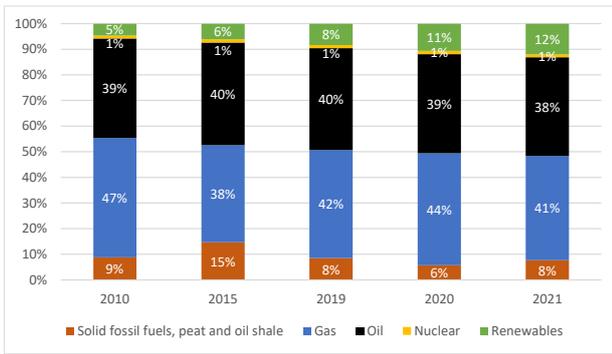


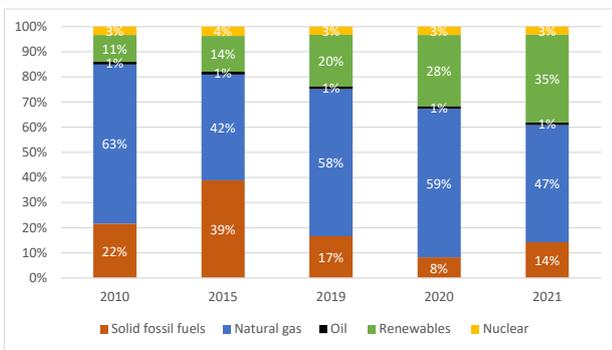
Key energy figures

Graph 1: Energy mix



Source: Eurostat

Graph 2: Electricity mix



Source: Eurostat

Saving energy

1. Key energy savings measures

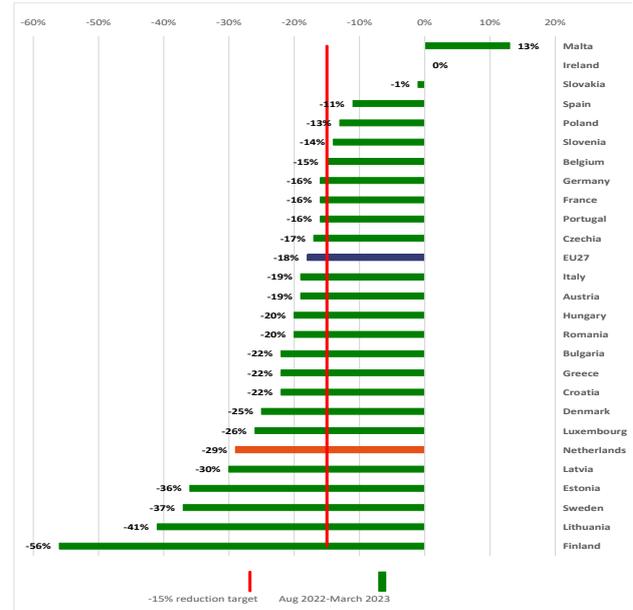
- The **'Flip the Switch' campaign to incentivise energy savings** is aimed at households, consumers, businesses and the public sector. Initially the campaign focused on short-term actions, but it has been extended to actions aimed at preparing society for the winter and more structural actions.
- The **obligation for businesses to implement energy efficiency measures** resulting from an energy audit has been extended to include a wider range of measures and a broader range of businesses.
- **Investment subsidy for sustainable energy and energy savings (ISDE)** (EUR 624 million), which awards grants for investments in small-scale heat pumps, solar boilers, insulation and heat connections to improve energy efficiency and the National

Insulation Program with the goal to insulate 2.5 million homes.

2. Gas Demand Reduction

The Netherlands has reduced its gas consumption by **29%** in the period **August 2022-March 2023**, above the decrease of EU consumption (18%) and surpassing the 15% voluntary gas demand reduction agreed at the EU level ⁽¹⁾.

Graph 3: Natural gas demand reduction (August 2022-March 2023)



(1) Cyprus does not use natural gas

Source: Eurostat, DG ENER calculations

Diversification of energy supplies

1. Key actions

Import dependency from Russian natural gas was **35%** in 2021 (equalling 14.3 bcm). In **2022**, Netherlands received 2.2 bcm of Russian gas through LNG.

Between January and March 2023, Netherlands received 0.3 bcm of Russian LNG ⁽²⁾

2. Gas Infrastructure Developments

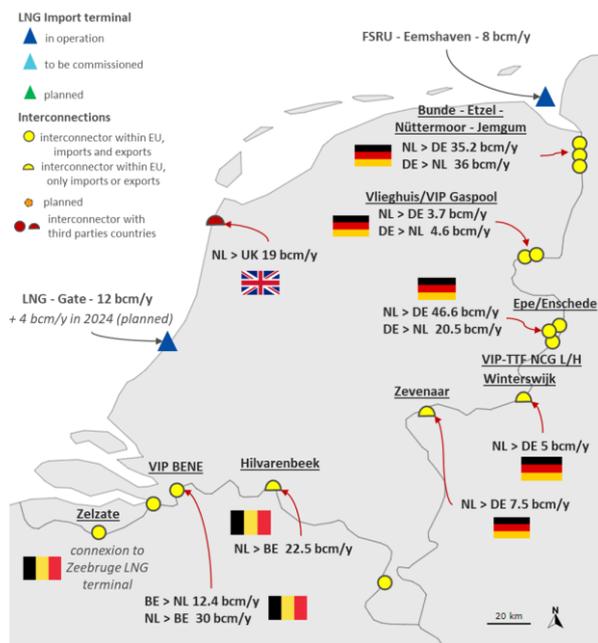
⁽¹⁾ Regulation (EU) 2022/1369 of the Council of 5 August 2022.

⁽²⁾ European Commission (based on Refinitiv and ENTSO-G).

The Netherlands has far-reaching plans to phase out natural gas. Part of its gas infrastructure will be used to transport hydrogen.

It plans to become a European pivot in gas exchanges by developing its liquefied natural gas import infrastructure, gas pipelines and gas storage facilities. When it comes to LNG, the Gate LNG terminal in the port of Rotterdam was launched in 2011 and has a nameplate capacity of 12bcm, three LNG storage tanks, and three truck loading bays. Gasunie and Vopak are planning to take a final investment decision to build the fourth storage tank their Gate LNG terminal by September 1st, 2023.

Map 1: LNG terminals and cross-border interconnections



Source: DG ENER

3. Gas Storage

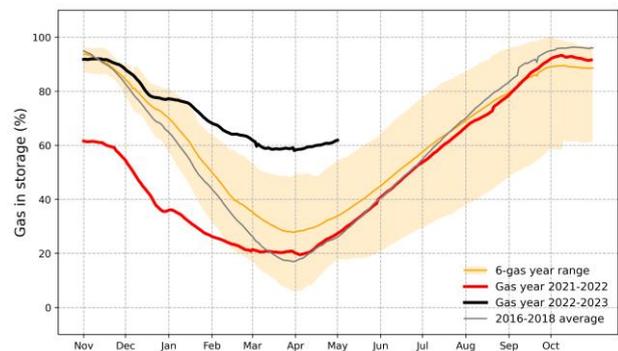
The Netherlands has **the third largest storage capacity⁽³⁾ in the EU in absolute numbers** after Germany and Italy, with 13.1 bcm, which can cover 30% of annual demand. The Dutch government expects to spend up to EUR 520.5

⁽³⁾ The Netherlands operates 6 underground storage facilities managed by 5 operators: UGS EnergyStock (managed by UGS EnergyStock), UGS Nüttermoor H-1 (managed by UGS Nüttermoor H-1), CUGS Grijpskerk and UGS Norg (Langelo) (managed by NAM), UGS Alkmaar (managed by TAQA Pek Gas), UGS Bergermeer (managed by TAQA Gas Storage).

million to fill the gas storage unit at Bergermeer to a sufficient level (where Gazprom has some usage rights on the basis of the Dutch authorities' 'use it or lose it' principle), one of Europe's largest, in the winter of 2023/2024.

The Netherlands fulfilled its gas storage obligations last winter, reaching 88.05 % by 1 November 2022⁽⁴⁾, above the EU legal obligation of 80%, and ended the heating season with a filling gas storage of 61.43% by 2 May 2023.

Graph 5: Storage levels in the Netherlands



Source: JRC calculation based on AGSI+ Transparency Platform, 2022

Energy Platform

Regional Group of reference: North-West Europe

National companies participating to the Industrial Advisory Group: Vitol Holding BV (Vitol)

On Wednesday, May 10, the European Union launched its first international tender for joint gas purchases. A total of 25 international suppliers and more than 110 companies have decided to participate and intend to purchase 11.6 billion cubic meters of gas (including 2.8 bcm of LNG). Deliveries are expected to take place between June 2023 and May 2024.

⁽⁴⁾ Regulation (EU) 2022/1032 of the European Parliament and of the Council of 29 June 2022 amending Regulations (EU) 2017/1938 and (EC) No 715/2009 with regard to gas storage.

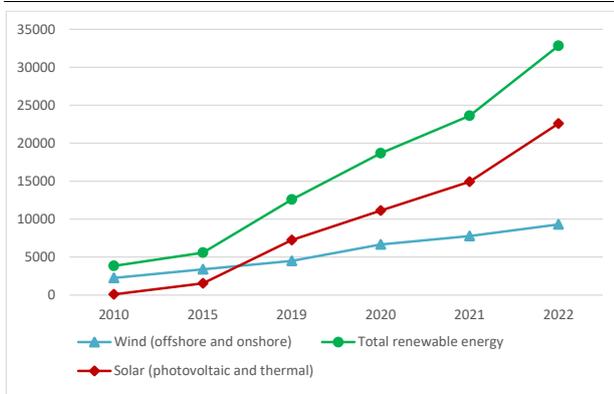
Accelerating clean energy

1. Installed Renewable Capacity

In **2022**, the Netherlands installed around 9.24 GW of renewable capacity, bringing the total to **32.83 GW**.

In **2022**, the annual growth rate of installed renewables power capacity was **39%**, compared to 26% in 2021.

Graph 5: Installed solar and wind power capacity (in megawatt)

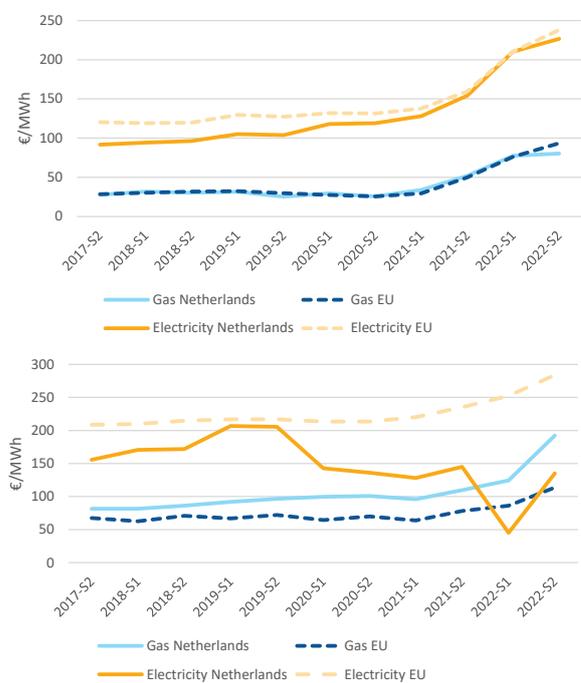


- (1) The renewable power capacity data reflects the capacity installed and connected at the end of the calendar year.
- (2) In 2022, the Netherlands installed **1.5 GW** of **wind power** capacity (vs. 1.1 GW in 2021)
- (3) In 2022, the Netherlands installed **8 GW** of **solar power** capacity (vs. 4 GW in 2021)

Source: IRENA, RE Capacity statistics, 2023

Energy price developments

Graph 6: Netherlands' energy retail prices for industry (top) and households (bottom)



- (1) On electricity, the band consumption is for DC households and ID for industry
- (2) On gas, the band consumption is D2 for households and I4 for industry

Source: Eurostat

Recovery and Resilience Plan (RRP)

- **EUR 4.7 billion in grants** (updated, representing approximately 0.5% of 2021 GDP). **EUR 55.3 billion in loans**
- **Adoption date by Council: 4 October 2022.**
- **Number of payment requests submitted:** None
- **Latest payment request** - status: none submitted so far.
- **First annual RRF event with stakeholders planned for Q4 2023.**
- **Climate target: 48%**