



10-year network development plan

Methodology and process, introduction to the debate

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3rd EREGEG workshop on 10 YNDP

Brussels, 26 January 2010

- **ENTSOG will be responsible for the plan**
 - Scenarios and assumptions to be discussed with stakeholders
 - Announced projects translate some commitment from TSOs
 - Provide elements on projects' feasibility
- **Content of the plan**
 - Simulations of disruptions using a model of the integrated network
 - Map of gas flows and international bottlenecks
 - Monitoring report
 - Consistence between national, regional and EU 10 YNDP
- **Develop a flexible and pragmatic approach**
 - Learning by doing process
 - Need for flexibility

ER GEG ambitions for the 10 YNDP

- More than an aggregation of national plans
 - **Combine top down and bottom up**
- Provide a shared vision of long term EU gas dynamics
 - **Consensus on scenarios**
- Infrastructure needs to complete the single EU market
 - **Promotion of competition**
- Analysis of system's resilience and bottlenecks
 - **Promotion of security of supply**
- **The results of the plan are proportional to the degree of commitment of all parties involved**

Views on the 1st ENTSOG 10 YNDP

- **EREGEG welcomes**

- First pan-European overview of supply, demand and capacity development
- ENTSOG Plan constitutes a complete database
- Distinction of projects according to their degree of maturity
- Assessment of capacity gaps in the peak-day analysis with mature projects
- Chapter on “Changes since 2008”, kind of Monitoring Report

- **Potential improvements**

- More homogenization of data and assumptions
- Include security margin (%) and SoS scenarios
- The Annual Supply Scenario is infrastructure-based (no assessment is made on the availability of upstream gas)
- Conclusions sometimes too vague (ex: need for entry capacity in a set of 11 countries)
- Detailed analysis of bottlenecks

Obstacles and risks, feedback from experience

- **Obstacles/difficulties**

- Heterogeneity of national data
- Different obligations related to TSO status under the 3rd package
- Different assumptions between countries/TSOs
- What does the concept of national plans relate to?
- Assess the probability of projects

- **Risks**

- Market distortions
- Arbitrary prioritization of projects against others

→ **Challenge: develop a collective approach to the preparation of the 10 YNDP**

- **ENTSOGE views on the way forward?**
- **Improvements expected compared to the 1st plan?**
- **Scenario building/selection**
 - Relevant sources?
 - Should the EU develop alternative scenarios to PRIMES?
 - Integration of energy policy orientations?
- **Contributions from stakeholders**
 - What contributions expected?
 - Meetings and consultations?
 - Role of the GCG and the Madrid Forum?