

# **Feedback from the public consultation on TYNDP 2015**

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# Public consultation: points covered



***Following the publication of TYNDP 2015 on 16 March 2015 ENTSOG organized a public consultation between 31 March and 5 June***

***It covered the different components of the report:***

- > Chapter on Infrastructure projects
- > Chapter on Barriers to investment
- > Chapter on Demand
- > Chapter on Supply
- > Assessment chapter

***...and asked for respondents views on the following:***

- > The stakeholder engagement process
- > The handling of project maturity
- > The assessment of the sustainability criteria



# Public consultation: answers received



## ***ENTSOG has received a limited number of answers***

- > 9 answers from the following respondents
  - E-Control
  - Edison
  - Elengy
  - Energy Community Secretariat
  - Energy Regulatory Office of the Czech Republic
  - Eurogas
  - Gas Natural Fenosa
  - TAP
  - Uprigaz
- > One of them was not answering the consultation questionnaire

## ***It nevertheless provided a good basis for the analysis, thanks to...***

- > the broad profile of the respondents (project promoters, associations of suppliers and traders)
- > and the level of detail of the answers



# Chapter on infrastructure projects

## ***The chapter***

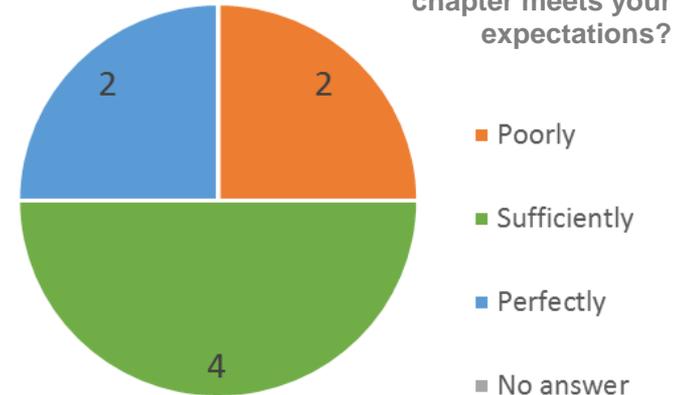
- > It is intended to give an overview of projects submitted in the TYNDP
- > Overall opinion: perceived positively but could be improved

## ***Respondents welcome***

- > The presentation of the overall progress in infrastructure development from one TYNDP to the next
- > The introduction of Infrastructure “Levels” (Low, High, PCI) in this edition

## ***Recommendations***

- > Provide geographical information on the projects
- > Be more critical about the status of projects to avoid ending with an unrealistic High Infrastructure Level
- > Projects costs should be collected and considered in the assessment





# Chapter on Barriers to investment

## ***The chapter***

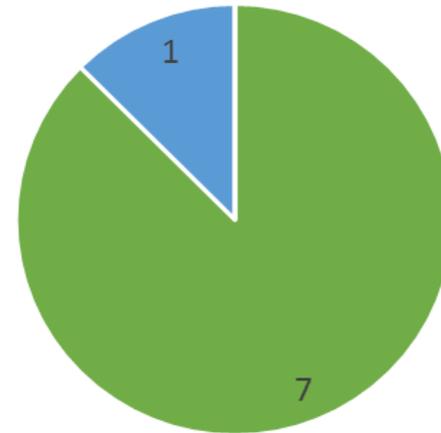
- > This new chapter is a bottom-up analysis of barriers to investment
- > Overall opinion: appreciated but could be further improved

## ***Respondents welcome***

- > The analysis on barriers, which they share
- > The bottom-up approach based on project submission

## ***Recommendations***

- > Be more explicit on the response rate
- > Increase the robustness of the analysis by minimizing the number of responses pointing at “other” non specific barriers
- > Stress the impact of the European Energy Policy, especially regarding the power generation sector, on the investment climate
- > Provide further analysis depending on project maturity and location



In which extend this chapter meets your expectations?

- Poorly
- Sufficiently
- Perfectly
- No answer



# Chapter on gas demand (1/2)

## Analysis of historical gas demand

### *The chapter*

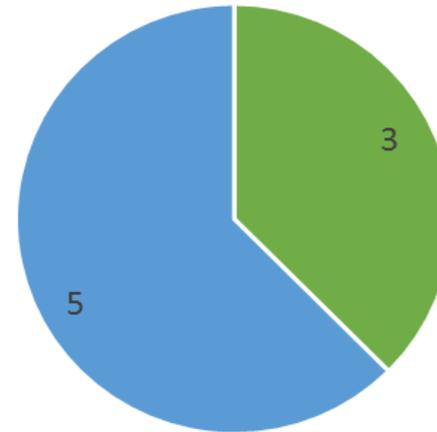
- > It is intended to give context but not draw conclusion on future evolution of gas demand
- > Overall opinion: highly appreciated

### *Respondents welcome*

- > The analysis of historical demand trends
- > The focus on power generation

### *Recommendations*

- > Report the last available demand data
- > Analyse the historical peak demand regarding its coverage by the different supply sources



In which extend this chapter meets your expectations?

- Poorly
- Sufficiently
- Perfectly
- No answer



# Chapter on gas demand (2/2)

## Definition of demand scenarios

### *The chapter*

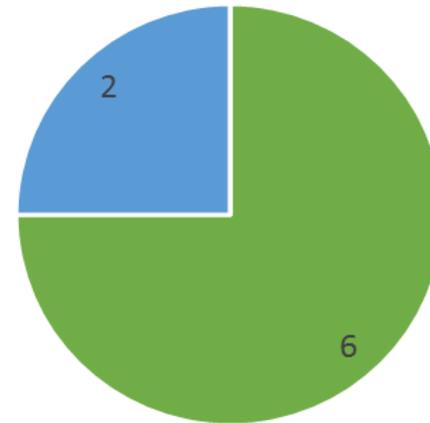
- > It defines the 2 demand scenarios used in the assessment
- > Overall opinion: appreciated but could be improved

### *Respondents welcome*

- > The definition of demand scenarios, inaugurated in TYNDP 2015
- > The coordination with ENTSO-E on power generation

### *Recommendations*

- > Ensure clarity on how the scenarios are built
- > Reflect national specificities while ensuring an overall EU consistency
- > Use up-to-date data for the power sector



In which extend this chapter meets your expectations?

- Poorly
- Sufficiently
- Perfectly
- No answer



# Chapter on gas supply (1/2)

## Analysis of historical supply trends

### *The chapter*

- > It is intended to give context but not draw conclusion on future evolution of gas supply
- > Overall opinion: it is appreciated

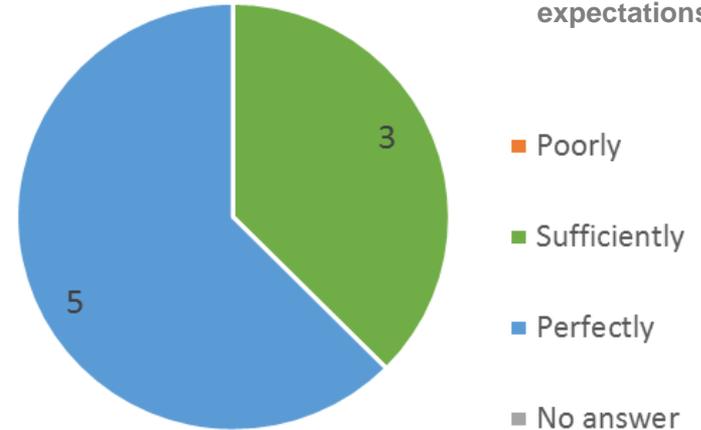
### *Respondents welcome*

- > The analysis of historical supply trends
- > The information provided at import route level

### *Recommendations*

- > Report the last available supply data

In which extend this chapter meets your expectations?

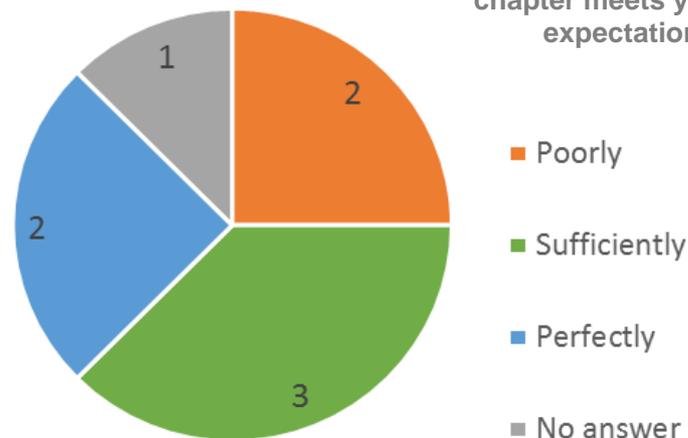


# Chapter on gas supply (2/2)

## Definition of supply potential

### *The chapter*

- > It describes each supply source by defining 3 “potentials” (minimum, intermediate and maximum). It is used:
  - to assess the supply adequacy outlook
  - to set min and max levels for the modelling
- > Overall opinion: It is rightly identified as an important element of TYNDP robustness and could be improved



### *Respondents welcome*

- > Description of the background for each supply potential

### *Recommendations*

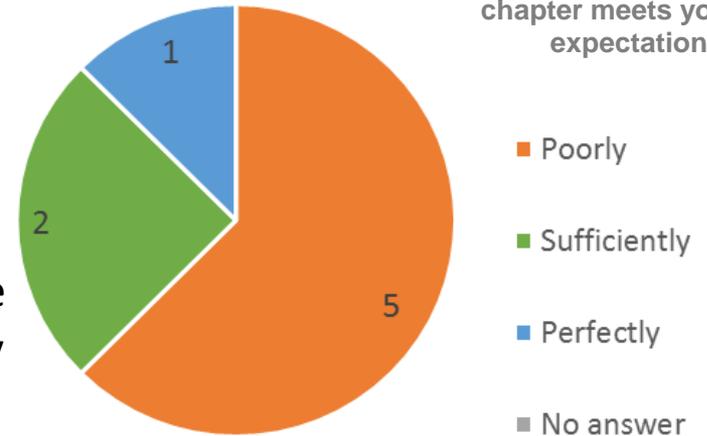
- > Make use if third parties information (IEA,...) to support the analysis
- > Reconsider the usefulness of the intermediate supply potential
- > In terms of supply modelling, take into account the specificities of LNG and carefully define the supply price curves



# Assessment chapter

## *The chapter*

- > It is intended to reflect
  - The wide range of expectations from stakeholders
  - The regulatory requirement, among which the application of the approved CBA methodology
- > Respondents have not only commented on TYNDP, but also on Project-Specific CBA
- > Overall opinion: it is considered as too complex



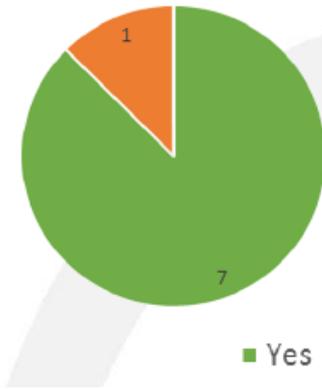
## *Recommendations*

- > Better identify the investment gap
- > Reconsider the added-value in TYNDP of monetisation and of some indicators, whose understanding is uneasy
- > Consider taking into account non-physical constraints (LT contracts,...)
- > Provide more clarity on the modelling of storages and LNG terminals

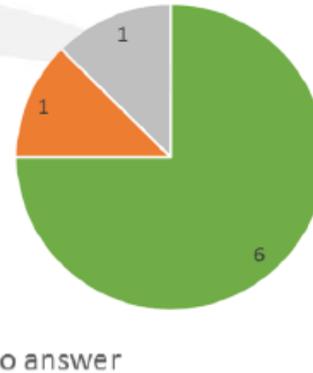


# The stakeholder engagement process

Did ENTSOG offer sufficient possibilities for stakeholder engagement?



Have you taken part in any of the public workshop of SJWS related to TYNDP 2015?



■ Yes

■ No

■ No answer

## ***Overall opinion***

- > The stakeholder engagement process, through the Stakeholder Joint Working Sessions, is considered robust and useful in providing transparency and understanding
- > The definition of demand scenarios and supply assumptions appears as points requiring specific attention

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# Handling of project maturity

## ***ENTSOG proposals were***

- > To collect further information regarding project maturity
- > To get better information regarding the coordination interconnected infrastructures
- > To consider only the projects submitted before the deadline
- > Not to consider changes to submitted projects after the deadline (unless formal request from the European Commission)

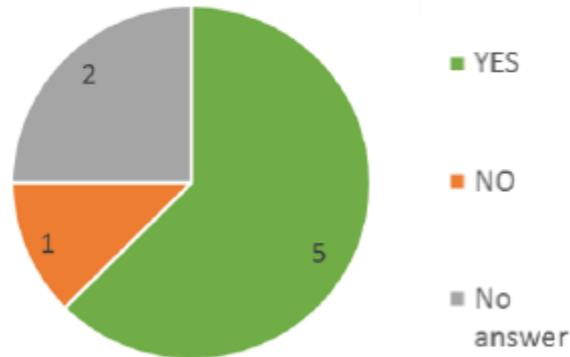
## ***Overall opinion***

- > Respondents generally support these ENTSOG preliminary proposals
- > They stressed as crucial to ensure a transparent and non-discriminatory project collection process



# Assessment of the sustainability criteria

In TYNDP 2015 sustainability focused on RES production and CO2 emissions from power generation. Do you agree with this approach?



## ***Overall opinion***

- > Respondents support ENTSOG approach to sustainability assessment
- > Even if for some TYNDP should first focus on infrastructure adequacy to security of supply and diversification



# Conclusion



## ***A mostly convergent feedback...***

- > The public consultation feedback is mostly in line with the feedback from the European Commission, ACER Opinion and ENTSOG own perception

## ***... factored in TYNDP 2017 foreseen improvements***

***Detailed implementation will be further discussed during the stakeholder engagement process***



# Thank You for Your Attention

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