

Stakeholders' Input

ENTSOG TYNDP 2013-2022 – SJWS #1
24 January 2012, 09:30 -- 17:00
ENTSOG offices, Brussels

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1. List of attendees

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ENTSOG	Andrea Ćirlićová Olivier Lebois Carmen Rodríguez Adela Comanita Martina Firtik	ACER	Thomas Hölzer Damjan Zagožen
Enagás	Idora Lejona Nunez Maria Junco	BNetzA	Jürgen Dengel
NG UK	Bill Goode	E.ON Ruhrgas	Michael Hüskén Thomas Dirksmeyer
GTS	Piet Nienhuis	GIE	Philipp Palada Gaston de Lahitte
Fluxys	Nicolas Grégoire	Gas Natural Fenosa	Carmen Rey de Arce
Snam	Stefano Astorri	Edison	Mariacristina Barassi Sabelli
GDF Suez Infrastructure Branch	Noël Coupaye	ENI	Simone Rossi
GDF Suez	Vincent Gautier	TAP	Davide Rubini Cristiano Francese

The 1st SJWS focused on the explanation and discussion regarding the methodology of the TYNDP 2011-2020 in terms of infrastructure projects treatment, and supply and demand scenarios. Furthermore, suggestions for the upcoming TYNDP 2013-2022 were presented and discussed during the meeting. Pros and Cons of the following suggestions were openly discussed; any conclusions and recommendations concerning the TYNDP 2013-2022 development are subject to further discussion in SJWS.

2. Infrastructure projects

- ✓ Infrastructure Questionnaires submitted by project promoters should be made available to MSs and NRAs prior the modelling phase for a project status check; the project promoters would be informed about any comments MSs or NRAs may have on their project; ultimately, it will however be the information and data submitted by project promoters that will be the basis for consideration within the TYNDP framework
- ✓ Infrastructure Questionnaire could be reviewed by SJWS participants before publishing
- ✓ TYNDP should include all projects submitted. In this context, essential information without which a project will not be included in the Plan should be clearly specified
- ✓ TYNDP should include an overview of projects providing a summary of the project status (achieved and remaining steps) as indicated in the Infrastructure Questionnaire
- ✓ TYNDP should handle the idea of providing a summary of the project status very carefully, as the project status can hardly be described in a unique and non-discriminatory way and thus might lead to a misleading comparison of projects.
- ✓ TYNDP should include a comparison of information relative to the same project included in previous TYNDP editions, in particular for delay related issues
- ✓ Modelling could be based on additional project clusters for non-FID projects in particular in the future framework of Connecting Europe Facility
- ✓ An additional cluster for modelling could be based on the permitting or intergovernmental agreement (IGA) status or supply agreements in place; any concrete additional project clustering will be discussed at relevant future SJWSs

- ✓ The FID/non-FID-criteria should remain the only criteria to distinguish between projects for modelling purposes
- ✓ Clustering based on criteria other than FID would require ENTSOG to investigate on the information provided by project promoters
- ✓ Additional information could be asked from project promoters such as the project drivers, alternative solutions and the reasoning for the project timing on a voluntary basis. Information on already achieved steps and pending ones could be further detailed in the questionnaire (permitting, supply contract agreement...)
- ✓ Assessment could be done on a project by project basis in order to assess individual benefit
- ✓ Cost estimates for projects at different level of development are so heterogeneous that comparison is difficult; the current aggregation of costs per infrastructure type and FID status however provides certain indication of possible accuracy
- ✓ More convergence required in the way that infrastructure projects are handled in ENTSOG TYNDP, GRIPs and National TYNDPs

3. Demand

- ✓ ENTSOG should introduce an additional demand scenario based on MSs' demand forecasts
- ✓ A list of criteria should be defined for consideration by TSOs when forecasting demand, incl. a check list for national Renewables Action Plans (NREAPs)
- ✓ Transparency of assumptions and the origin of the forecast may be more important than a common set of criteria
- ✓ It is necessary to combine bottom-up and top-down approach

4. Supply

- ✓ The use of 2008 & 2009 figures to initialize supply might have introduced an overestimation of the daily flexibility. Such flexibility should remain constant without additional supply contracts or infrastructures rather than increase with yearly values
- ✓ Nearly all pipe gas imported from outside Europe is delivered under long-term contracts

- ✓ The behaviour of LNG supply under peak situation should take into account that some established LNG chains (DES contracts) are dedicated to some terminals and can be treated similar to pipeline gas, whereas most of the newer LNG projects were developed for global market, so that supplies strongly depend on the global pricing of LNG and shipping times. Peak situations should be primarily be modelled as a mix of underground gas storages and pipe gas supply
- ✓ The behaviour of LNG supply should reflect the dependency to price signal, high prices often occurring under peak situation. Such situation may lead to ship diversion or reloading and impact LNG tank management in order to provide high flexible supply to the European market. Such features are clearly different than pipe gas supply.
- ✓ Maximum flexibility of Algerian, Libyan and Norwegian supplies is nearly reached