



Gas Transmission Europe

# **GTE+ European Ten Year Network Development Statement; Interaction with the ECSEE**

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# European Ten Year Network Development Statement

- Developments of the European gas transmission capacities
- Ability of the European gas transmission network to meet the requirements of the European Gas Market

## Deliverables

- Capacity Development Report until November 2008
- Demand Scenarios vs. Capacity Report until July 2009
- European Ten Year Network Development Statement until December 2009

External Stakeholder Survey from December 2008 to March 2009 to seek input from market participants to the development of the required scenarios on gas supply and gas demand

# Background

- European TSOs have recognised the importance of developing a long term network development statement
- Priority further emphasised through the inclusion of provisions for such a report in the European Commission's 3rd legislative package proposals
- GTE+ committed to working on the development of this statement prior to the formal adoption of new legislation
- May inform the debate on where new transportation capacity may be required
- Not intended to form the basis of an investment plan for TSOs
- Signal potential required developments to all parties at an early stage
- TSOs cannot deliver on this alone, input from other market participants will be required throughout the process
- More detailed work will be possible and developed by ENTSOG

# Assumptions

- Build on national development statements
- Identify capacity gaps/mismatches not only for cross-border capacity, but also for European relevant within-country interconnection points between TSOs
- Include the development of Supply/Demand Scenarios
  - Stakeholder Dialogue to receive stakeholder input to Supply/Demand scenarios.
  - Build a picture of the relationship to capacity evolutions across Europe
- Dialogue with stakeholders to feed into development of the detailed content of the Ten Year Network Development Statement
  - Workshops to engage with stakeholders
  - Identify requirements to ensure stakeholder needs are fully reflected.



# Capacity Development Report

- Capacity development at all relevant European interconnection points for the ten year period from 2008 to 2017
- Identify potential capacity gaps with respect to interconnection point capacities
- European overview which type of information on long-term capacity evolution, supply and demand scenarios is already available nationally

To be published in November 2008

# Demand Scenarios vs. Capacity Report

- Development of Demand Scenarios
  - Based on input received from European TSOs and/or other available sources
- Assessment of the ability of networks to meet the demand requirements
- Stakeholder Survey on the European level to receive stakeholder input to
  - Demand Scenarios
  - Supply Scenarios (for final TYS)

To be published in July 2009

# European Ten Year Network Development Statement

- Development of Supply Scenarios together with stakeholders
  - Use information received in the Stakeholder Survey
- Analysis of Supply and Demand Scenarios against capacity evolution
- Include an overview of current and foreseen processes (e.g. open seasons) to have a view of the capacity needs and the related capacity forecast.

To be published in December 2009

# Interaction with the ECSEE

- Contribution to development of the three reports
  - TSOs to Capacity Development Report to be published November 2008
    - Answers received from Bulgartransgaz, FGSZ (former MOL Transmission), Geoplin plinovodi, OMV Gas, Plinacro, SRG and Transgaz
  - All ECSEE stakeholders to the two subsequent reports
- Without engagement of ECSEE GTE's work can not be complete
- European reports can feed into the ECSEE debate

GTE welcomes the fruitful co-operation for the further development of the European and ECSEE gas markets