

Press Release

European Network of Transmission System Operators for Gas adopts the Ten-Year Network Development Plan 2013-2022

The European Network of Transmission System Operators (ENTSOG) has today adopted the Ten-Year Network Development Plan (TYNDP) 2013-2022.

The TYNDP provides an in-depth analysis of the European gas infrastructure and its potential development over the next ten years. It assesses how this development, bringing about increased physical Market Integration, would support the objectives of the European energy policy. The results show that the planned infrastructure development has the potential to further facilitate a liquid and competitive common gas market and enhances security of supply. The new infrastructure may also play a significant role in improving sustainability in Europe.

The extensive stakeholder engagement process organised by ENTSOG in relation to this TYNDP contributed to the holistic and transparent view of the European wide gas infrastructure developments. Compared to the TYNDP 2011-2020, ENTSOG modelled a significant amount of additional cases capturing an even wider range of both supply and demand situations.

Stephan Kamphues, ENTSOG President said: *'The TYNDP confirms that in most parts of Europe a well-developed gas infrastructure, connected to various supply sources and capable of dealing with high daily demand and various supply situations, is in place. The achieved infrastructure-related Market Integration indicates the potential for the commercial integration of markets in Europe. The number of projects included in the TYNDP also illustrates that the system operators and other project promoters are willing to invest if the investment climate will be favourable. The results lead to the conclusion that these market initiatives (both FID and Non-FID projects) are likely to overcome most of the potential investment gaps and will support supply source diversification.'*

Regarding supply, the Supply Adequacy Outlook does not signal any lack of supply on an aggregated European yearly level considering the ENTSOG demand curve. This conclusion is based on the use of three potential supply scenarios for each identified supply source. The evolution of the Supply Potential will be strongly influenced by the trend followed by demand.

As highlighted in the past, the TYNDP is an evolving report that depends on the development of the market, the legal and regulatory framework and stakeholders' expectations. ENTSOG will soon face the challenge of developing a CBA methodology to be applied at the system-wide level in the next TYNDP and by individual project promoters for the assessment of their infrastructure in the process of identification of Projects of Common Interest. ENTSOG anticipates that, as with the TYNDP itself, several rounds of iteration may be needed to arrive at a sufficiently robust CBA methodology accepted by majority of stakeholders.

To collect feedback on the published TYNDP that will be considered for the development of the next edition, ENTSOG also launches a formal consultation and encourages stakeholders to provide response, in particular to the questions included therein. The consultation will be open for 3 months starting today and ending on 21 May 2013. ENTSOG will also organise a public workshop on 21-22 March in Riga.

The TYNDP Report, incl. all Annexes, and the consultation document are available at: <http://www.entsog.eu/publications/ten-year-network-development-plan-tyndp>

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Notes to Editors

- ENTSOG was founded on 1 December 2009 in line with Regulation (EC) 715/2009 and currently comprises 41 TSO Members and 3 Associated Partners from 25 EU countries, and 4 Observers from 4 non-EU countries.
- In line with Art. 8(3)(b) of Regulation (EC) 715/2009, ENTSOG is obliged to publish a non-binding Union-wide Ten-Year Network Development Plan every two years; the TYNDP 2011-2020 was published on 17 February 2011. Based on a formal submission to ACER which will follow shortly after the formal consultation, the Agency will provide a duly reasoned opinion as well as recommendations where it considers that the TYNDP does not contribute to non-discrimination, effective competition, the efficient functioning of the market or sufficient cross-border interconnection open to third-party access.