



Gas Transmission Europe

Investments into European Gas Transmission Infrastructure

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Energy Supplies: Making the Right Choices**

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Gas Transmission Europe

Outline

GTE at a Glance

GTE Investment Survey / Investment Principles

GTE+ European Ten Year Network Development
Statement

Conclusions

gte Gas Transmission Europe

GTE at a glance

- GTE is a column of GIE representing infrastructure operators. The GIE columns are:
 - GTE: Transmission System Operators
 - GSE: Storage System Operators
 - GLE: LNG Terminal Operators
- GIE and its columns aim to contribute to the achievement of the European internal gas market
- GTE started GTE+ in 2008
 - Predecessor organisation of the European Network for Transmission System Operators (ENTSOG) defined in the Third European Energy Package

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gte
Gas Transmission Europe
34 member companies
27 countries

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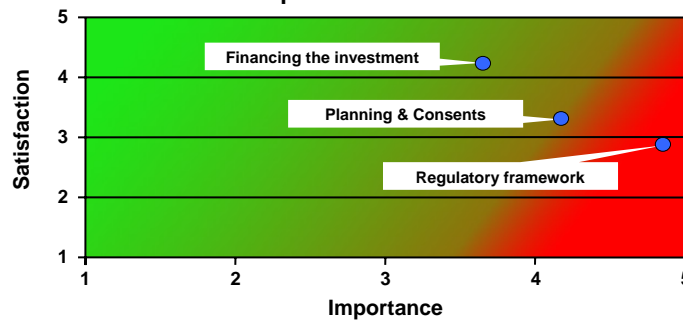
GTE+ European Ten Year Network Development Statement

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GTE Investment Survey

Importance and Satisfaction ratings for different aspects of investment



- Planning and Consents, and to a lesser extent financing, delay and complicate investment
- Regulatory framework is crucial for investment



GTE Investment Principles (extract)

- Movement towards a stable, predictable and compatible regulatory regime across member states is essential for facilitating a positive investment climate
- Underpinning investment through long-term binding commitments, from both the market and regulators, is vital to facilitate investment
 - These binding commitments should be made by system users through methods such as Open Season. TSOs should be in a position to take account of these, as well as the indicative findings from the stakeholder consultation, to build flexibility into the investment proposals
 - The investment proposals should be fully recognized by the regulatory commitment
 - There must be clear rules for investment conditions, including length of the regulatory period
- GTE considers improved coordination and cooperation within and between regulators and TSOs vital in case of an investment affecting two or more TSOs



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European Network Development Statement

- Objective
 - Describe the foreseen developments of the European gas transmission capacities for the upcoming ten years
 - Analyse 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



Project Timeline

	2008												2009											
	J	F	M	A	M	J	J	A	S	C	N	D	J	F	M	A	M	J	J	A	S	C	N	D
Capacity Development Report	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	█	
Demand Scenarios vs Capacity Report																								
Stakeholder Dialogue																								
European Ten Year Network Development Statement																								



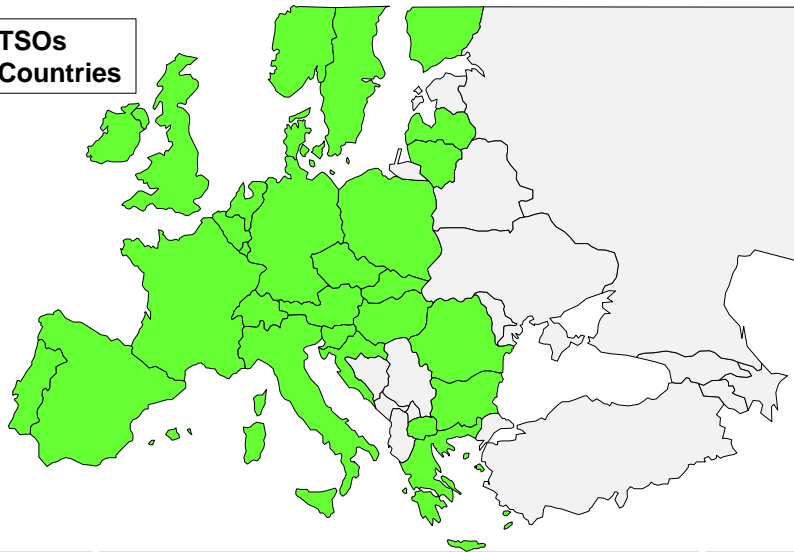
Overview Project Status

- Project Plan for first European TYS
 - Completed after consultation of European Stakeholders mid 2008
 - Three project phases defined
 - Stakeholder Dialogue integral part of project
- Capacity Development Report (Phase I)
 - Completed, published in November 2008
- Stakeholder Dialogue and Demand Scenarios vs. Capacity Report (Phase II)
 - Ongoing



Participating TSOs / Countries

- 46 TSOs
- 29 Countries





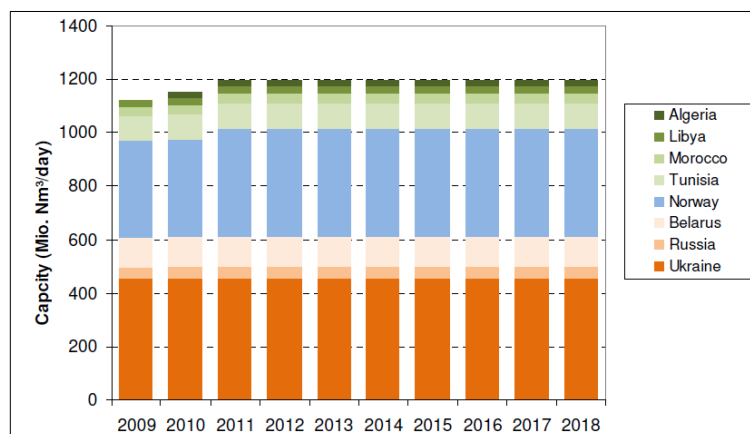
Capacity Development by Country

For each country

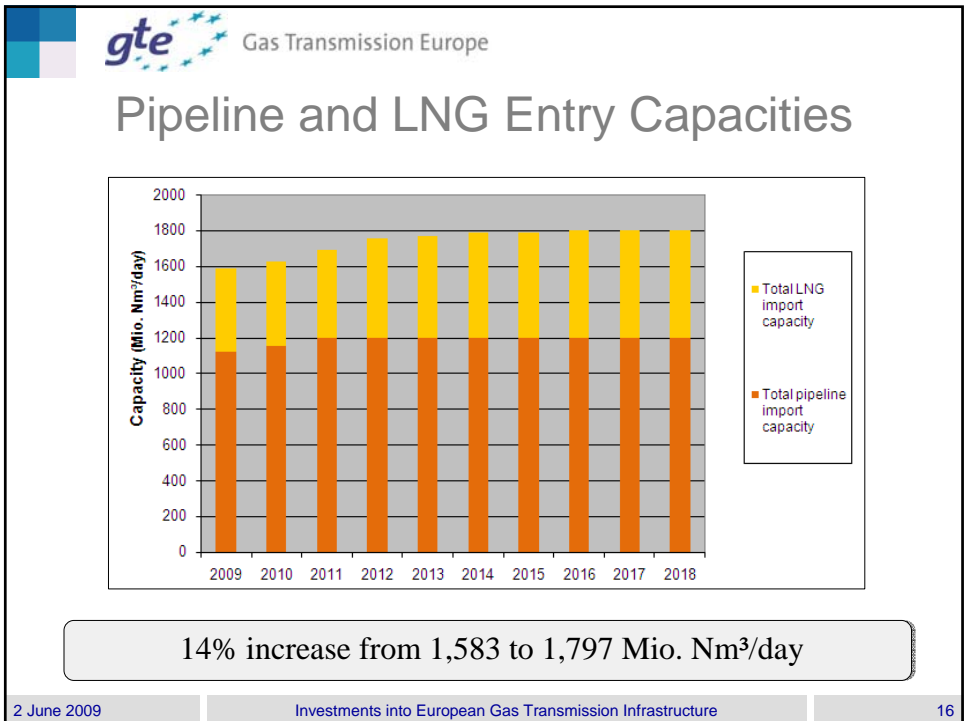
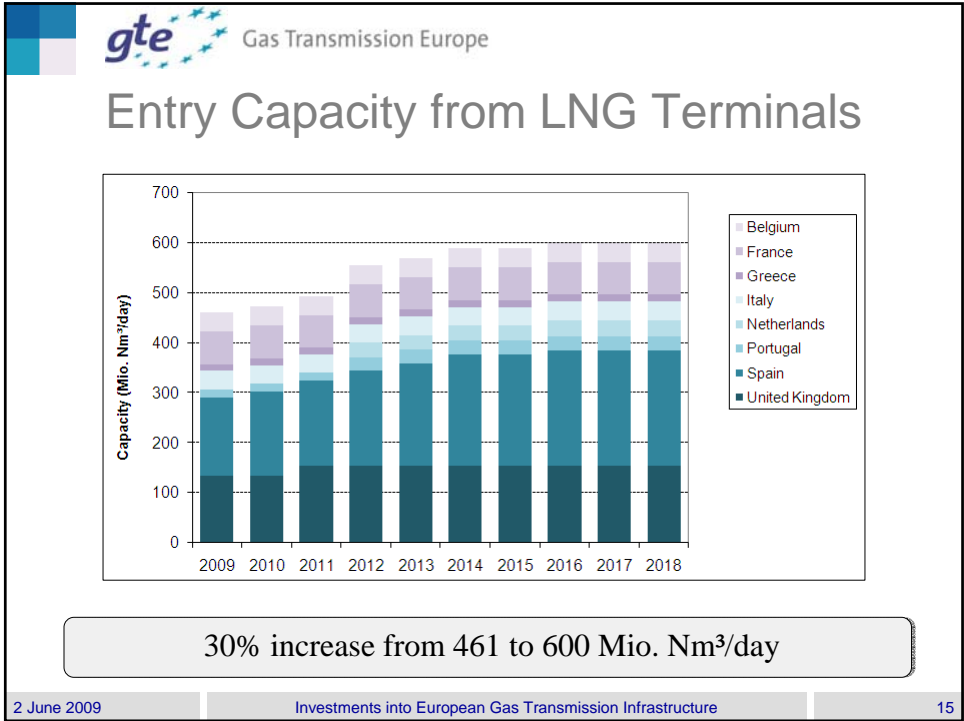
- Description of the existing network
- Current processes for investment, current publications
- Capacity development in the reporting period, investment decisions taken
- Possible projects, planned or running Open Seasons (individual or coordinated)

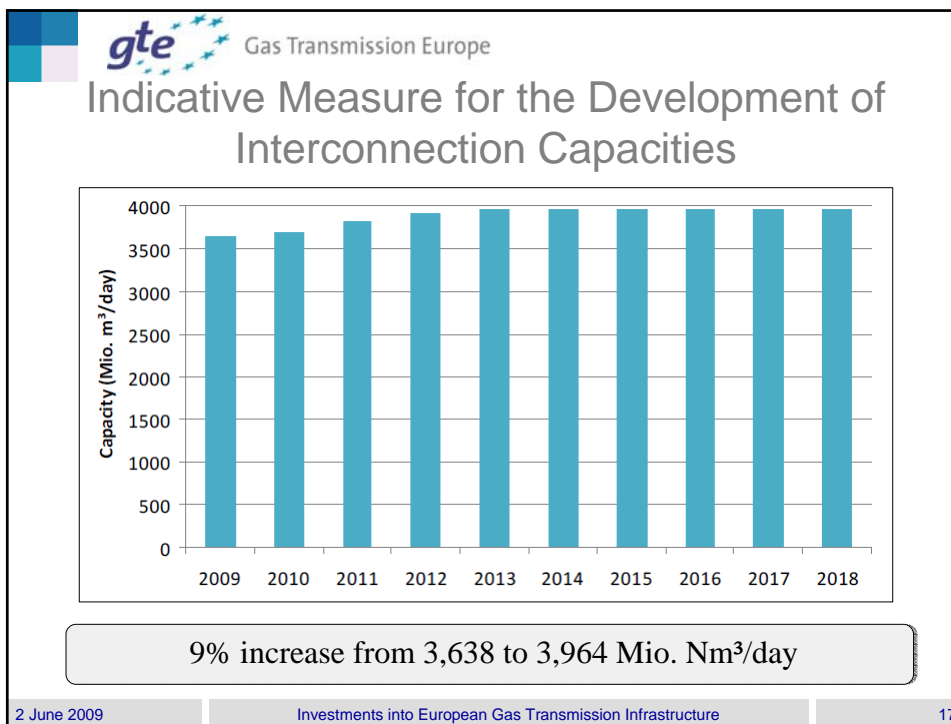


Pipeline Import Capacity



7% increase from 1,122 to 1,197 Mio. Nm³/day





Current Publications / Documents

Country	Type	Coverage (Years)	Data*	Publication Interval	Produced by
Austria	Mandatory	5	C, D & S	Annually	Other (AGGM)
Czech Rep.	Mandatory	10	C & S	Annually	TSO
France	Voluntary	10	C, D & S	Annually	TSO
Germany	Mandatory	3	C	Online upd.	TSO
Italy	Mandatory	10	C	Annually	TSO
Netherlands	Mandatory	7	C, D & S	2 years	TSO
Poland	Mandatory	3 (5)	C, D & S	Annually	TSO (for Gov.)
Portugal	Mandatory	3	C & D	Annually	TSO (for Min.)
Romania			C	Annually	TSO (for Min.)
Slovakia	Mandatory	10	C	Daily Upd.	TSO
Slovenia	Mandatory	10	C & D	2 years	TSO (for Min.)
Spain	Mandatory	10	C & D	4 years	TSO (for Min.)
UK	Mandatory	10	C, D & S	Annually	TSO

* Abbreviations: Capacity (C), Demand (D) and Supply (S)

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Stakeholder Dialogue

- Select and define appropriate demand and supply scenarios
- Reports on results achieved
- Discuss and agree next actions
- Regular meetings
 - Workshops
 - Bilateral and/or multilateral working meetings between workshops

Foreseen to accompany both project phases of 2009



Phase II: Demand Scenarios vs Capacity Report

- Development of demand scenarios
 - Identification of information sources
 - European level
 - National level
 - Stakeholder dialogue to select and define appropriate scenarios
- Assessment of the ability of networks to meet the demand requirements

To be published in July 2009



Phase III: European Ten Year Network Development Statement

- Development of supply scenarios
 - Identification of information sources
 - European level
 - National level
 - Stakeholder dialogue to select and define appropriate scenarios
- Analysis of supply and demand scenarios against capacity evolution

To be published in December 2009



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- GTE represents European gas transmission system operators
- Challenges with respect to investment climate
- GTE+ develops together with European stakeholders the first European Network Development Statement
 - Capacity Development Report has been published end 2008
 - Demand scenarios and supply scenarios will be developed for the complete statement by the end of 2009
- Sound investment climate needed to support further development of European gas transmission systems