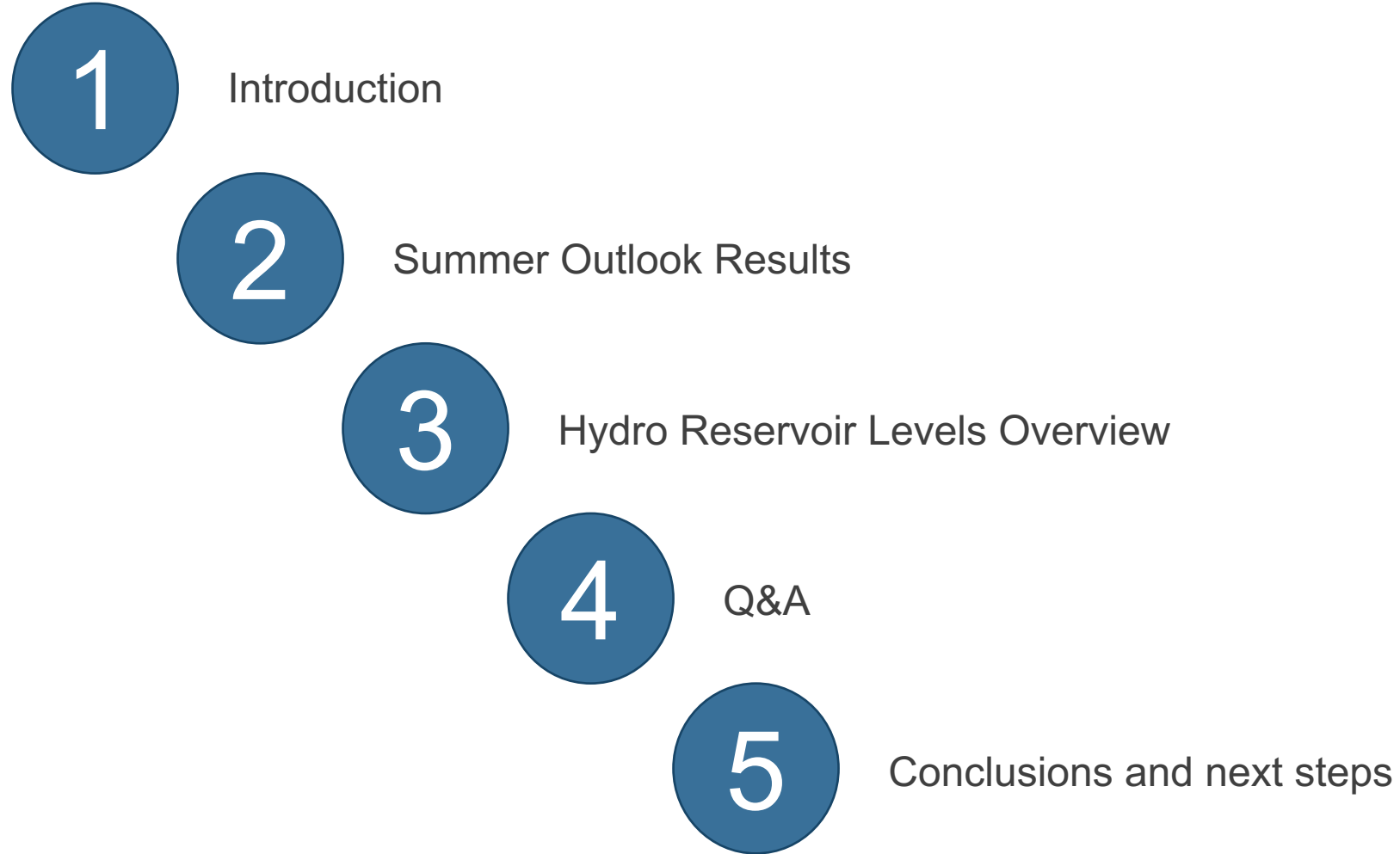


SUMMER OUTLOOK 2018

Alban Joyeau
Lea Dehaudt, Moderator

ENTSO-E
ENTSO-E

Programme



What do the outlooks tell you?



Role of interconnections



Influence of external factors: weather, market conditions, consumer behaviour...



Sensitivity analysis: look for severe case scenario (1 out of 20 years) & see how system reacts

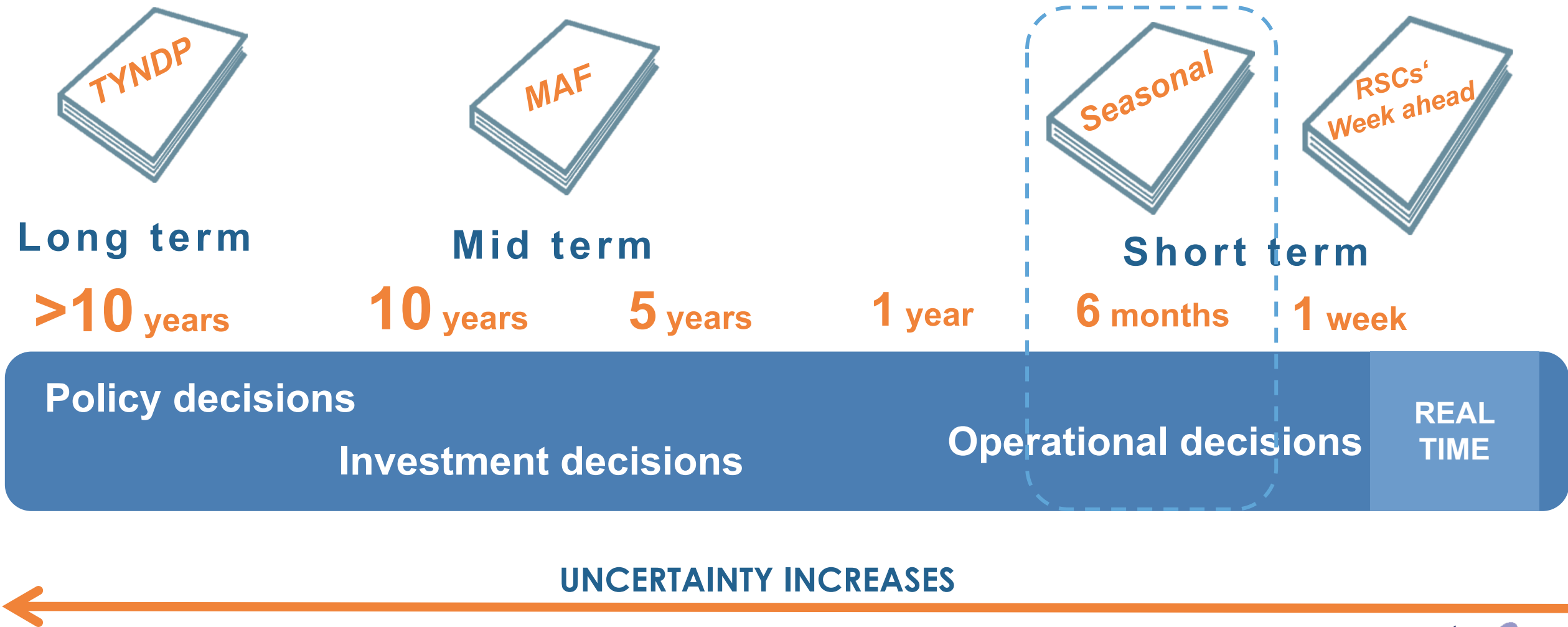


Review of the previous season for a deeper understanding and improvements

Summer Outlook 2018 results

Alban Joyeau, Senior Adequacy Advisor, ENTSO-E

Different risks addressed with different timeframes



Seasonal Outlooks- Stepwise approach

Inputs from TSOs and pan-European databases



European constraining scenarios

synchronous peak
(upward) => Wednesdays 7 pm

low demand with high RES
(downward) => Sundays 5 am & 11 am



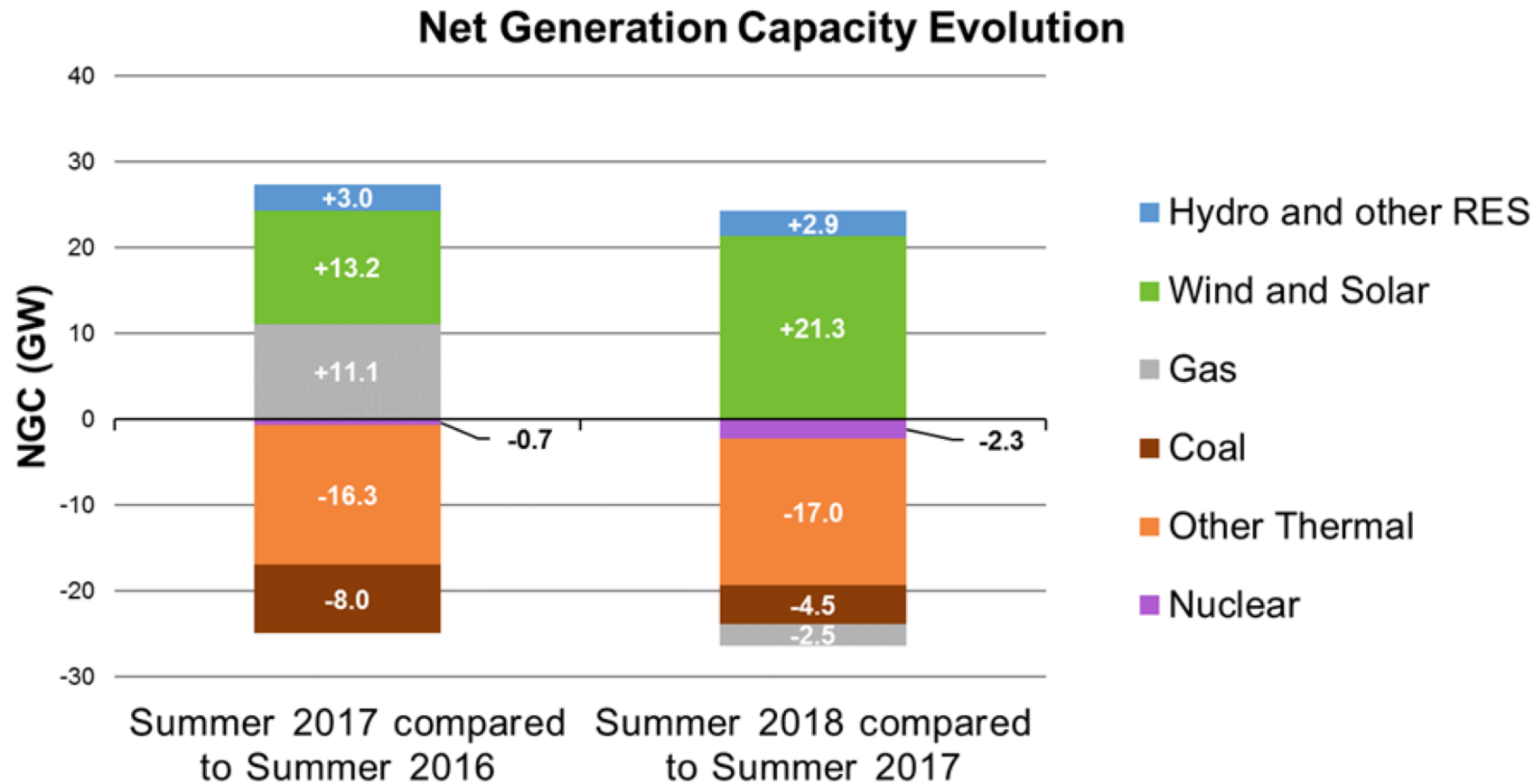
Focused analysis on weeks flagged at risk

Probabilistic approach using
numerous situations
(temperature, wind...)

Aim is to estimate the
probability that an
issue could occur

Main drivers
are identified

Evolution of Europe's generation mix



Gas recently slightly declined, but globally increased in past two years

New RES partially compensates decommissioning of conventional power plants

Summer Outlook – Severe Conditions



Adequacy at Pan-European synchronous peak demand time



Adequacy indicators of Italy better than Summer 2017



Increased generation availability



Better estimation of renewable generation



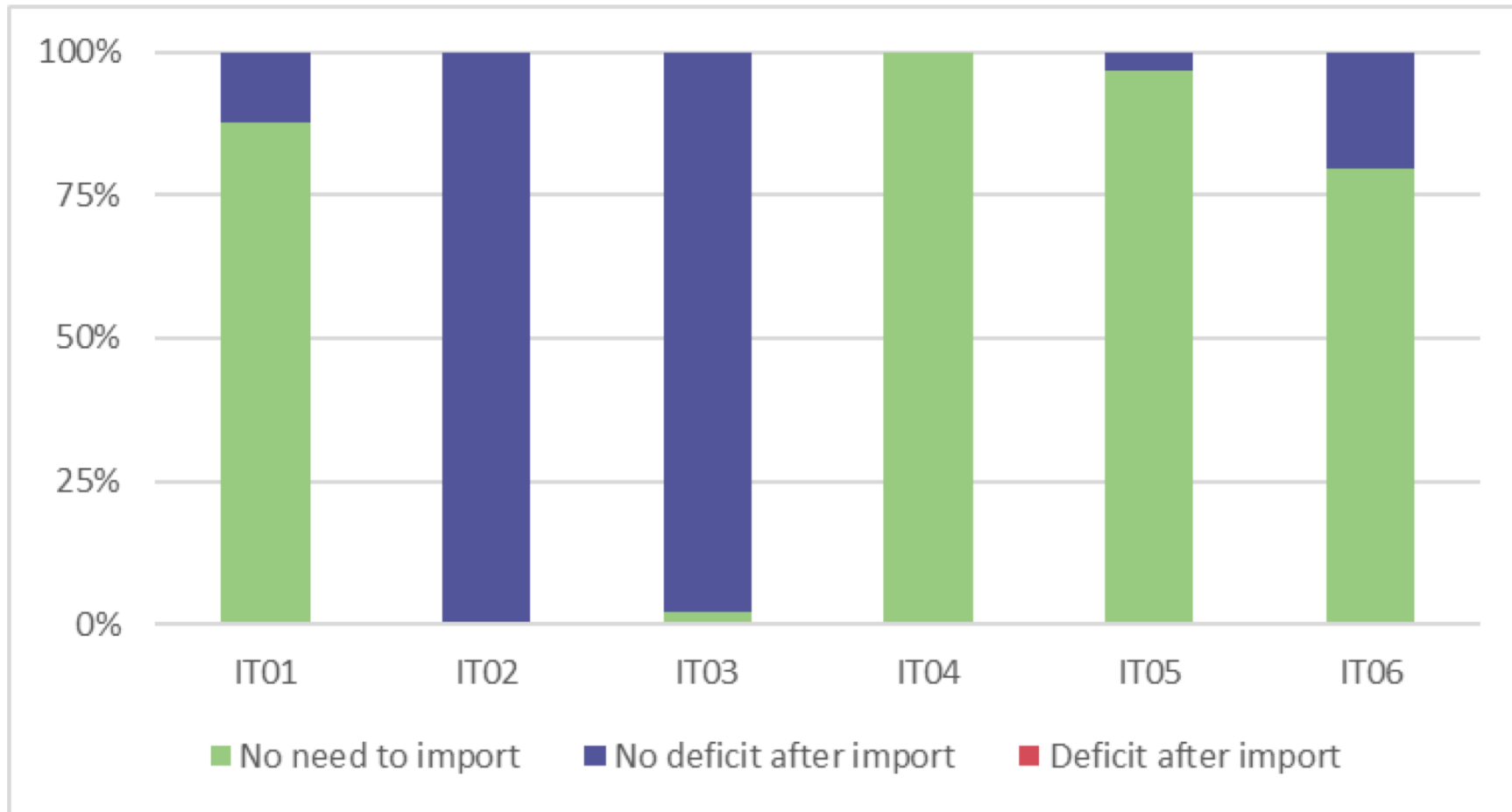
Capacity excess (export)

Import driven by market

Import needed for adequacy

15% of deficit cannot be covered with imports

Probabilistic assessment on week 30 of 2018



Hydro reservoir levels in early spring



Central Europe



Historical high levels of snow in the Alps



Iberia

Nordics

What for future Seasonal Outlooks?

Prepare future implementation of Clean Energy Package,
especially on Risk Preparedness

Extend coordination with week ahead adequacy
performed by Regional Security Coordinators

Prepare further steps for Seasonal Outlook full probabilistic hourly modelling
in similar way as in Mid-term Adequacy Forecast

Do you have questions?

Seasonal Outlook is unique pan-European, system wide, security of supply analysis

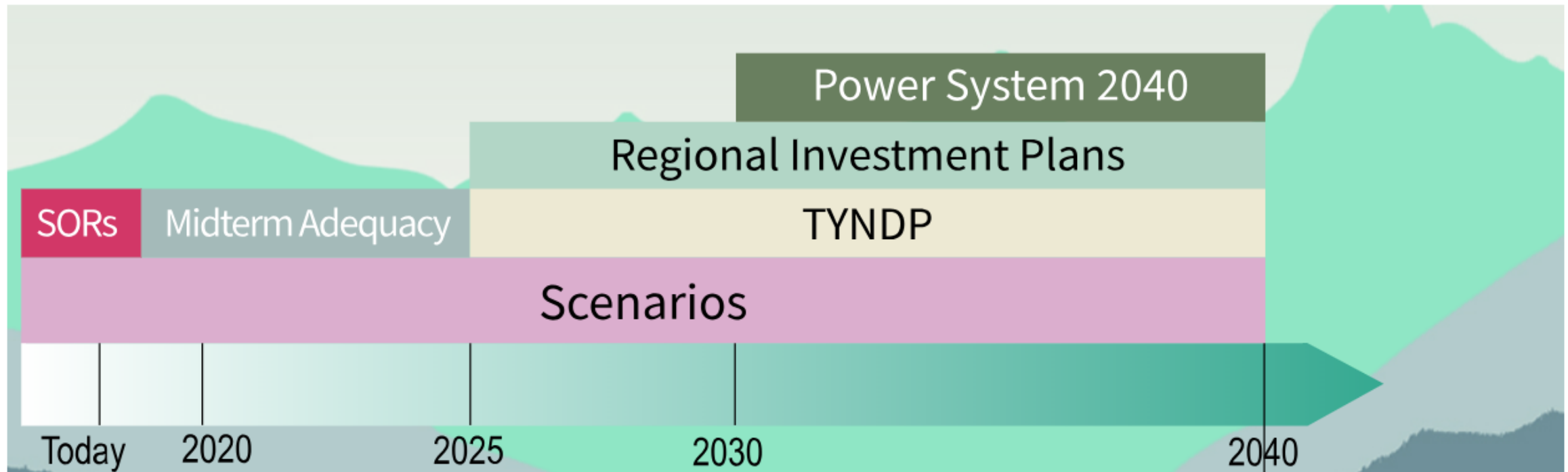
Methodologies are continuously improving and cooperation is enhancing

Electricity system expected to be adequate under severe conditions

Melting snow restores hydro reservoir levels

Takeaways

Power Outlooks



Upcoming - Don't miss out



Early July: release of the
TYNDP 2018

Launch event to be announced
shortly

Thank you for your attention

For any question, contact Lukas.Galdikas@entsoe.eu
