General overview of the TYNDP 2012 outcomes

learning / TYNDP 2014 expectations

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Manager System Development Committee
ENTOS-E

ENTSO-E's Ten Year Network Development Stakeholder Group Kick-off meeting

12 November 2012, Brussels

Reliable Sustainable Connected

Energy policy goals

– **Sustainability/GHG**:
  - More renewables, further from the loads
  - More heating and mobility with electricity

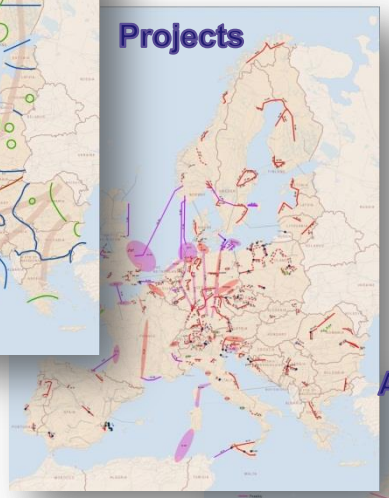
– **Competitiveness/market integration:**
  - More long-distance flows

– **Security of supply**
  - More optimal resources sharing

all require grid capacity !

Why a Ten-Year Network Development Plan?

Regulation (EC) 714/2009 – "In order to ensure greater transparency regarding the entire electricity transmission network in the [Union], the ENTSO for Electricity should draw up, publish and regularly update a non-binding [Union]-wide ten-year network development plan"



Transparency

TSO cooperation platform

Stakeholder involvement

Inform EU policy and investment decisions

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TYNDP 2012 summary

> 100 projects, 52 300 km, approx. €104 bn of investments

- Notwithstanding non pan-European significance projects

+1.3% per year grid length development despite a major upcoming shift in generation mix to accommodate wider, stronger, more volatile power flows

- One third of the present generation capacity to be built in the coming decade (i.e. +3% per year)

Social acceptance is still the major challenge!

- 1 in 3 TYNDP 2010 investment projects are delayed because of longer than expected authorization procedures

A dense 2-year long study process

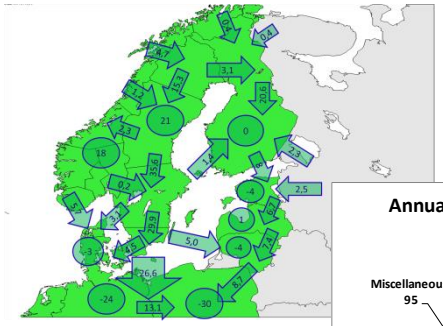
- Scenario elaboration & validation
- Market studies
- Network studies
- Project identification & valuation
- Reports compilation

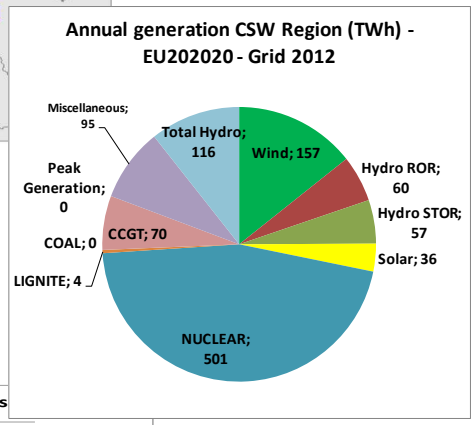
↳ at stake

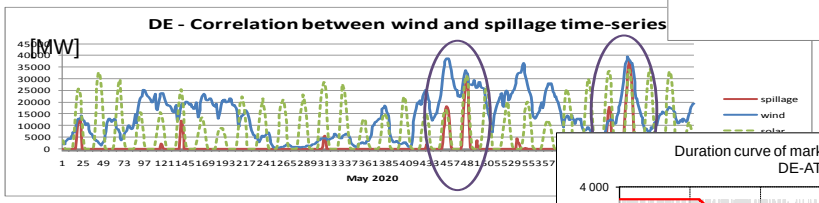
timely delivery

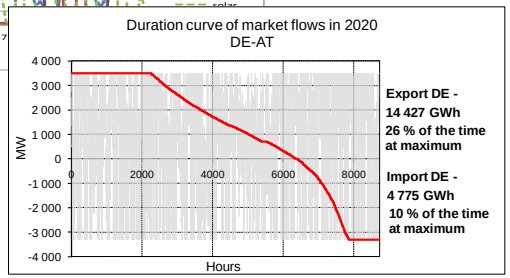
consistent results

limited resources









Presently being investigated

↳ Subject to adaptations &/o changes

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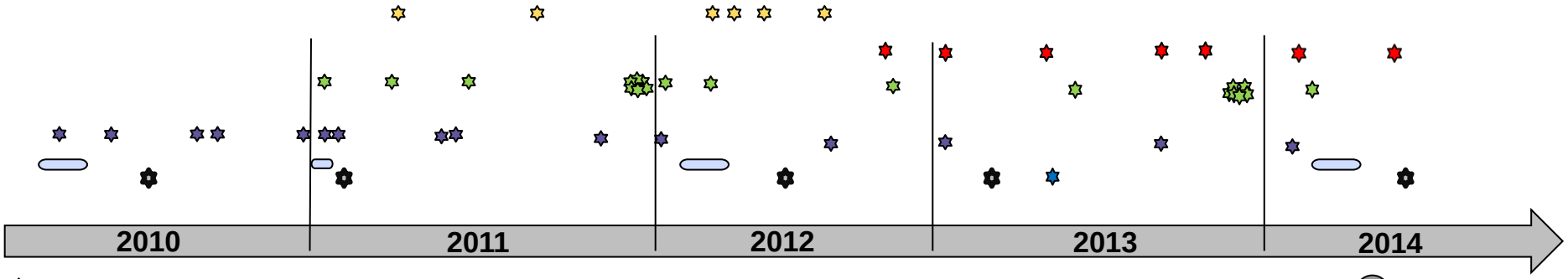
TYNDP 2012 - interaction with our stakeholders and members



- Acer ENTSO-E meetings
- ENTSO-E stakeholder forum meetings
- ENTSO-E external workshops
- Publication of the updated TOP
- ENTSO-E SOAF &/or TYNDP package final publication
- ENTSO-E internal workshops
- TYNDP 2014 public consultation

29 Internal/ external workshops for the TYNDP 2012

TYNDP 2014

2013- 2014

TYNDP stakeholders working group

TYNDP 2014 – initial view

1. Will be published July 2014
2. The package structure will be kept: 8 reports
3. Creation of the **Long Term Network Development Forum – stakeholder group**
   - The forum will not limit itself to the TYNDP topic, although, it is built initially around the development plan
4. **It will tackle 2030 horizon** ->2 stakeholder workshops on the 2030 visions
5. Development of the **Cost and Benefit Analysis methodology** for TYDNP 2014 is in progress
   - multi-criteria approach
   - expected Spring 2013
6. **Improved guidelines for the 3rd party projects** integration in the TYNDP
   - Based on the collaboration with the stakeholders
7. **Base for the PCI selection**

Multilateral studies for TYNDP 2012

June 2012 | Sept. 2012 | Dec. 2012 | Mar. 2013 | June 2013 | Sept. 2013 | Dec. 2013 | Mar. 2014

Pan-European inputs (MS, PSM…)

Phase 1: multi-lateral exploration studies 2030
- Identification/characterisation of new investment needs
-Identification/characterisation of new projects with GTC (first) assessment

Phase 2: RG projects assessment studies 2030

Phase 3: RgIPs and TYNDP reports
compilation & validation

Energy Infrastructure Package – helping the grid development

A timely legislative initiative addressing the most urgent issues

- Huge step forward to streamline permitting procedures

- Positive but unfocused effort to facilitate investments on the transmission grid
  - Cost-allocation is just part of the overall picture – cost-benefit analysis not a panacea
  - Incentivizing TSOs to deliver on time should be the priority

- Regional approach for decision making with TYNDP as the main starting point – Projects of Common Interest

Open questions

- What does the TYNDP mean to you?
- Energy Infrastructure Package: what next steps to make the maximum out of the legislation?
- What is the most important step for ENTSO-E to respond to the TYNDP's role in the Energy Infrastructure Package?