

10:30 – 12:30

GTE+ Workshop on the 10-Year Investment Statement

12:30 - 13:30

Lunch (standing buffet)

13:30 – 13:45

Opening address

13:45 – 14:45

Round table on methodology, highlights of the process and way forward

- *Presentation of ERGEG recommendations (CRE)*
- *Presentation by Panel Members:
European Commission DG TREN, ENTSOG, OGP, Eurogas, EFET*
- *Discussion*

→ 14:45 – 15:45

Intermediate results of ERGEG consultancy study:

„Model-based Analysis of Infrastructure Projects and Market Integration in Europe with Special Focus on Security of Supply Scenarios“

- *Status of the project (BNetzA)*
- *Intermediate results (EWI)*
- *Discussion*

15:45 – 16:00

Conclusions & way forward

Status of ERGEG's 10YNDP-Study

“Model-based Analysis of Infrastructure Projects and Market Integration in Europe with Special Focus on Security of Supply Scenarios“

Thomas Hölzer (BNetzA)

**ERGEG's 3rd Workshop on the
10-Year Network Development Plan**

26 January 2010

- **Increase know-how** on European infrastructure
- **Examination / validation of ENTSOG's work on 10YNDP and preparation for ACER**
- **Top down aspect: developing a European perspective**
 - European wide Supply and Demand assumptions as well as common infrastructure scenarios
 - European wide Map of gas flows: main cross-border points, storage and LNG facilities, consumption zones
 - Addressing European security of supply issues
- **Possible identification of infrastructure bottlenecks**
- **Study was tendered in summer '09:**
 - **Contractor: EWI (Energiewirtschaftliches Institut zu Köln)**
- **Study financed by CEER + individual NRA contributions**

- Study / TIGER-Model is an **economic based network simulation model**, but **no (technical) flow simulation** model
- Currently, necessary **data for European wide technical flow simulation not available** (for NRA's)
- **Practical applications** of the model result in satisfactory **resemblance of real flows**
- Infrastructure Model is based on existent **published capacity data**

→ “Best feasible” approach !

Scenario dimensions (number of variations):

- Supply (1)** → EU production, pipeline ~ & LNG imports
- Demand (2)** → Reference & high demand case
- Infrastructure (6)** → **core of this study**

Major Import Pipeline Projects allow for several infrastructure scenarios (to be modelled and analysed for 2019):

- **Reference:** Nord Stream I only (but no other major projects)
- **Nord Stream II:** Reference + 2nd line of Nord Stream
- **Nabucco:** Reference + Nabucco pipeline
- **South Stream:** Reference + South Stream pipeline
- **DG-TREN:** Reference + 2nd line of Nord Stream + Nabucco
- **Low LNG-Price:** DG-TREN + lower LNG prices

Sensitivities to be calculated for some scenarios:

- **Peak Demand Day** sensitivities:
 - will include not just monthly, but **daily** granularity
 - analyses will focus on utilisation of assets on the peak day
- **Security of Supply** sensitivities:
 - simulate system in a stress scenario
 - use **Russia-Ukraine** gas crisis to simulate effects for Jan. 2019
 - disruption of **13 days** (potentially prolonged to 4 weeks)
 - potentially: disruptions of supplies via **Belarus + Ukraine**
disruptions of supplies from **Norway**
→ disruptions of supplies from **Algeria**

- 10 Sept. 2009 **Kick-Off Meeting** ERGEG Steering Group
- 27 Oct. 2009 **2nd Workshop** w/ ENTSOG on 10YNDP: Presentation TIGER and Scenario Outline
- **TODAY** **3rd Workshop** w/ ENTSOG on 10YNDP: Presentation of interim results of the study
- Feb/March 2010 Final simulations and analyses (including additional security of supply sensitivities)
Preparation of Final Report
- April 2010 **Publication of the Final Report**
Presentation of Final Results at a dedicated **workshop** (potentially w/ ENTSOG)



Thank You!