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ERGEG "TYNDP" Workshop 11 February 2010

ENTSO-E perspective and outlook for the TYNDP

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Overview

- EC 714/2009: ENTSO-E to issue a non binding 10-year Network Development Plan
 - A vision for the future European HV grid
- Lots of expectations from stakeholders
 - A clear development framework,
 - Numerous background scenarios...
- ⇒ ENTSO-E will pro-actively release a *pilot project* report, 1st March 2010
 - Not waiting for the entry into force of the 3rd Package



Goals for the TYNDP

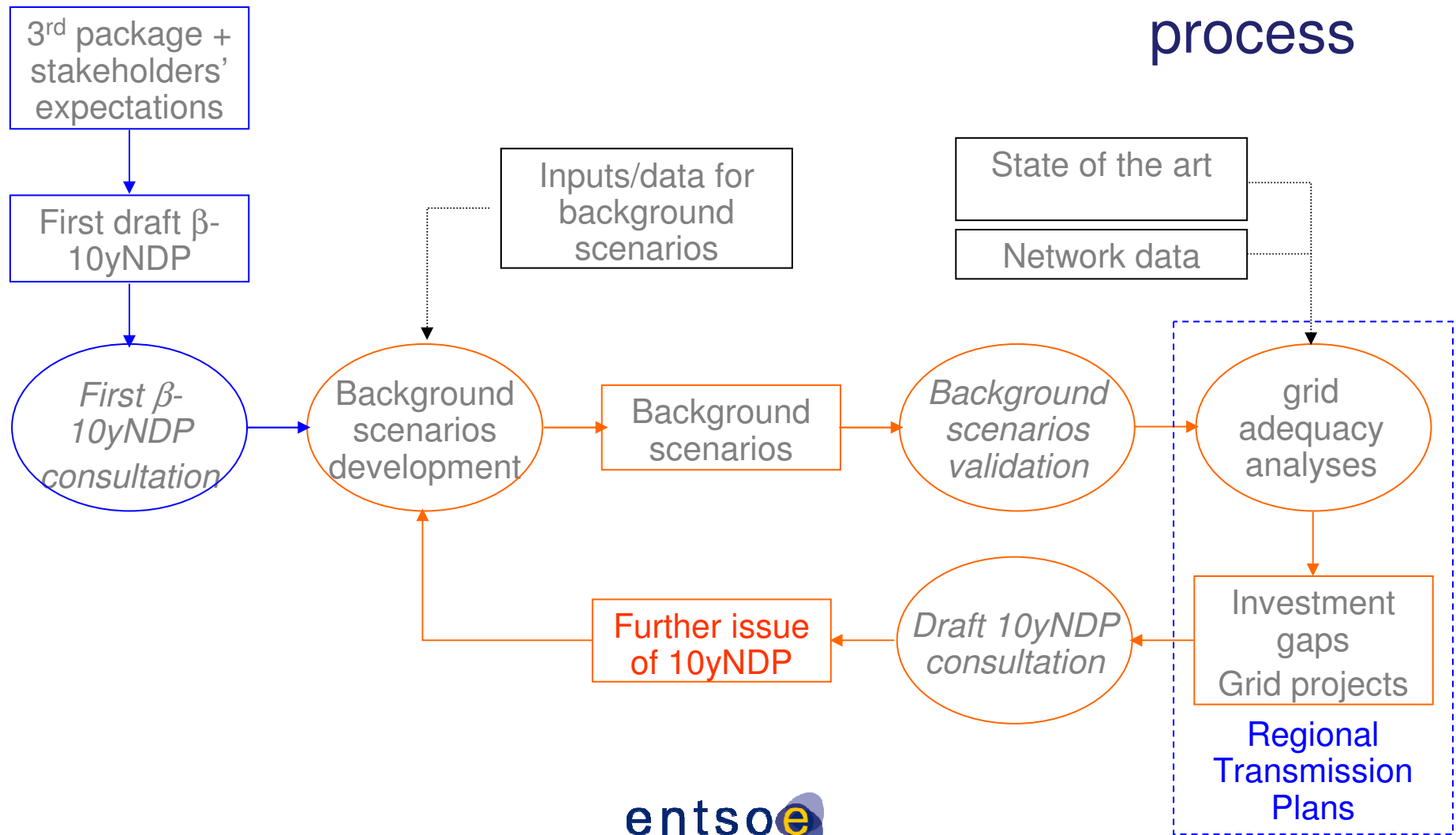
- A **common reference** ...
 - Summing up the most accurate information regarding the European HV grid development concerns
 - An in-depth consultation with all European stakeholders and support for a monitoring process
- ... meeting eventually all expectations
 - EU objectives (SoS, RES integration, IEM...)
 - Regulation compliant, and
 - Updated and *improved* every 2 years
- A basis for all stakeholders for their projects



ENTSO-E is finalising the 1st issue of TYNDP...

- Based on existing material
 - Stakeholders statements in 2009
 - Review of TSOs practices, projects, ...
 - Definition of scenarios (2020 survey still ongoing)
- A **first** attempt for the content organisation
- But a first **comprehensive** report
 - Highlighting scenario description, investments overview, technologies & barriers ... and leads for improvements
- = a **Pilot Project**, basis for further debates

... in order to initiate a long-run elaboration process





Developing grid evolution perspectives: a long-run process, involving all stakeholders

- TSOs play a key role
 - Grid expertise
 - Overview of market players intention
- ... but TSOs do not control all levels
 - Governments' energy policy?
 - Market players' actual decisions?
 - Future harmonised stable regulatory framework?
 - Permitting procedures? Return on investments?
- All stakeholders to contribute in the long-run
 - Consultation: a key input in this iterative process

Main content of 1st issue of TYNDP

- Challenges for grid development
- **Background scenarios**
 - + generation adequacy
- **Grid investment needs**
 - Transmission adequacy
- Planned **transmission projects**
 - Illustration of economic analyses & criteria, resilience
- Techno: state of the art & perspectives
- Conclusion, **toward next releases**
- Appendices

Bottom-up
scenarios of
*ENTSO-E System
Adequacy Forecast*
(released Jan 29th)

A bit of vocabulary regarding scenarios

- *A scenario*
 - Economic conditions, annual load curve + std. dev., generation fleet (units with tech. characteristics)
- *A case*
 - A particular situation to study within a scenario
 - one specific point-in-time (e.g. winter peak hours)
 - ... with a particular realisation of climatic conditions, availability of plants, and deriving merit-order dispatch
- *Bottom-up = coming trends*
- *Top-down = energy policy targets*

= market players intentions
as known to every TSO

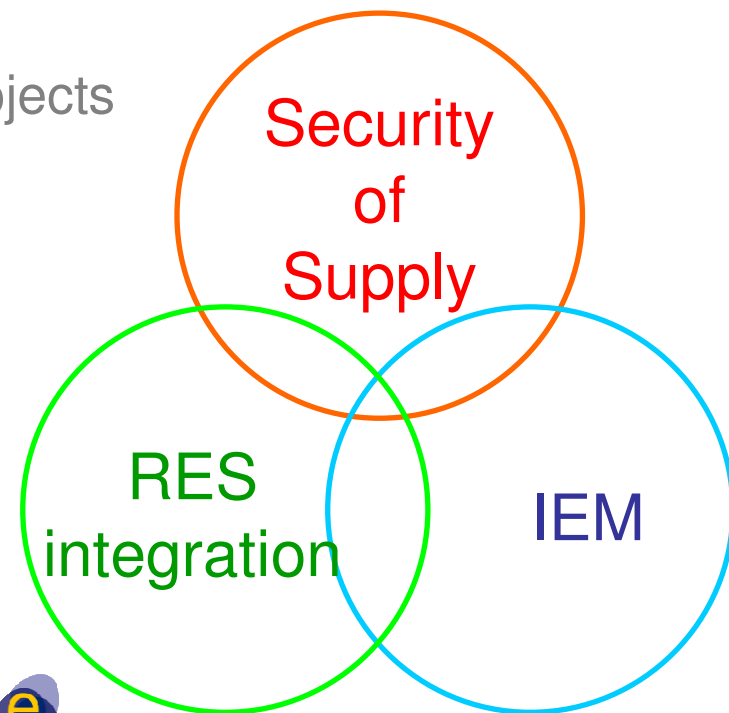
= longer run picture
of political goals

Scope of the 1st issue of TYNDP

- Projects *of European significance*
i.e. *which address at least one of the 3 pillars of the EU Energy policy*

- Not only cross-border projects

- 1 project usually addresses several pillars at once

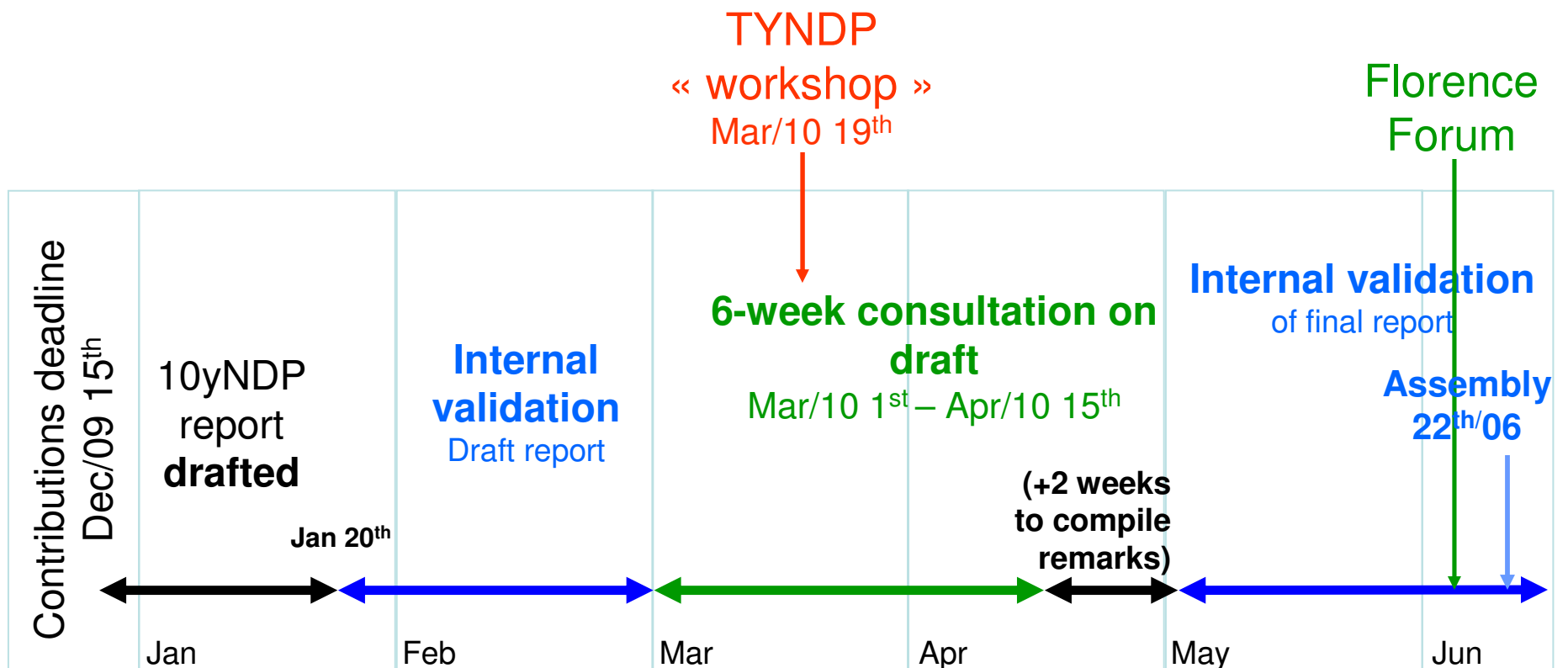




Next steps for the 1st issue of TYNDP

- Until Feb/10: 8 months preparation of the draft TYNDP
- 1st Mar/10 - 15th Apr: **consultation** on draft
 - What kind of information is useful?
- **19th March 2010: stakeholders' workshop**
- Jun/10: release of the first 10yNDP
 - ... notwithstanding with the development of bricks of methodology & procedure for the next issue *in parallel*

Synthetic schedule





Towards the second issue

- Guidelines for Regional Groups' inputs
 - TYNDP n+1 built on common TSOs studies but of different kinds
 - Pan-European base case models
- Top-down scenario(s): EU “202020” targets
 - As soon as NREAP available (Jun/10)
 - Scenarios development must involve stakeholders
- A **full 2-year process** starting Jul/10



Thank you for your attention!



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