Brussels – 27 June 2017

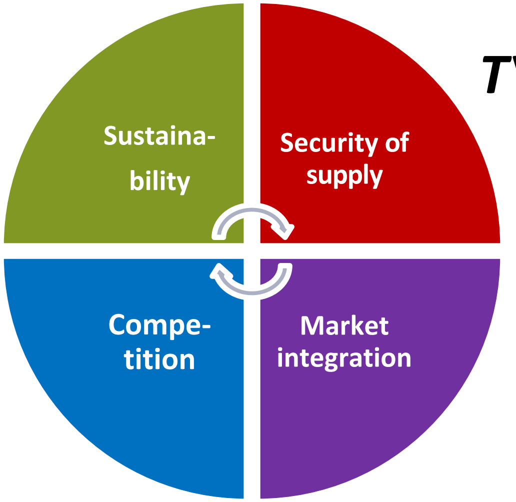
# TYNDP 2017

## Outlook on the development of the gas transportation network in the Balkans

**Presentation to GAC – 27 June 2017**

Image Courtesy of Thyssengas

# Is further infrastructure needed?

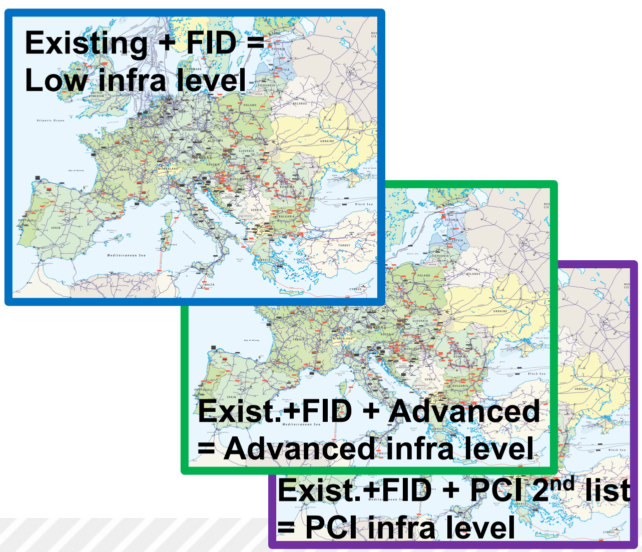



***TYNDP assesses the gas infrastructure against the Union energy policies***

***Are they achieved with the existing infrastructure and FID projects?***

**Yes**

***No further infrastructure needs***



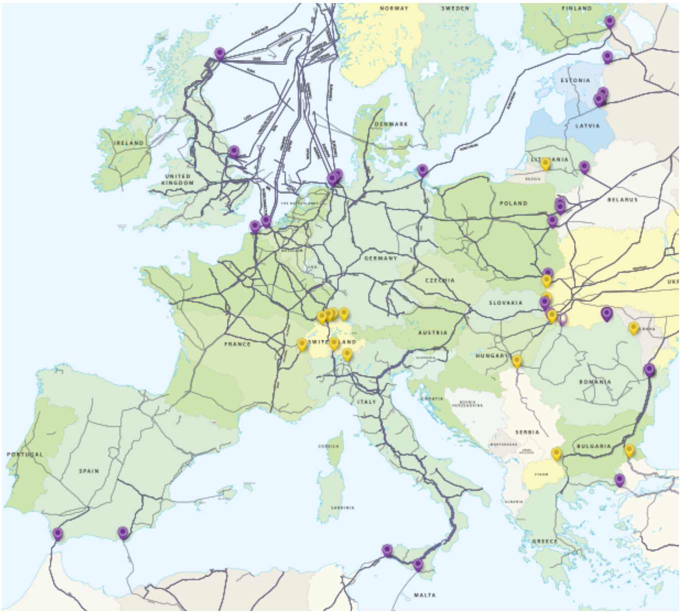

**No**

***TYNDP assesses further infrastructure development***

> FID projects + advanced projects

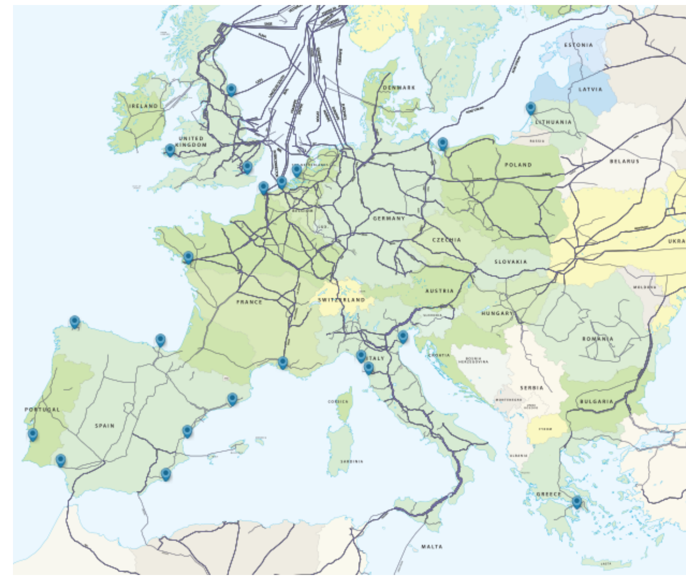
> FID projects + 2nd PCI list projects

# The existing infrastructure

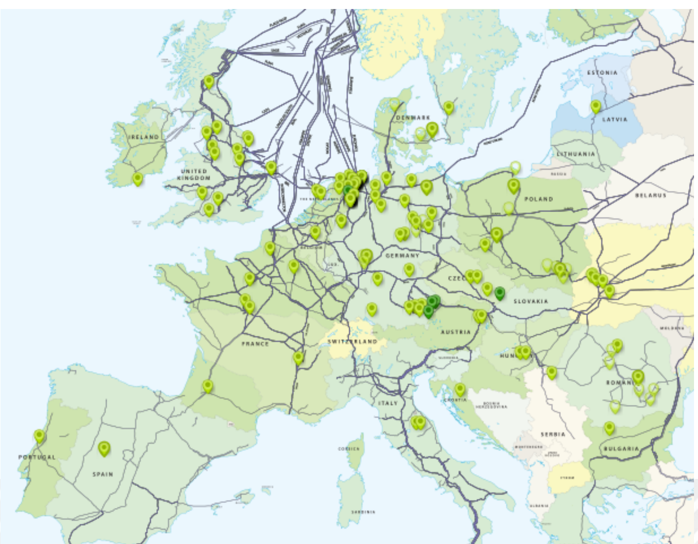


- ***Well-developed EU transmission network***
- ***Diversified pipeline imports***

**55 projects commissioned since first TYNDP**



- ***LNG terminals***



- ***Underground storages in most EU countries***

# The EU gas infrastructure is well developed

## …and already achieves a lot

**1 000 GW**

High cross-border capacities

**1 100 TWh**

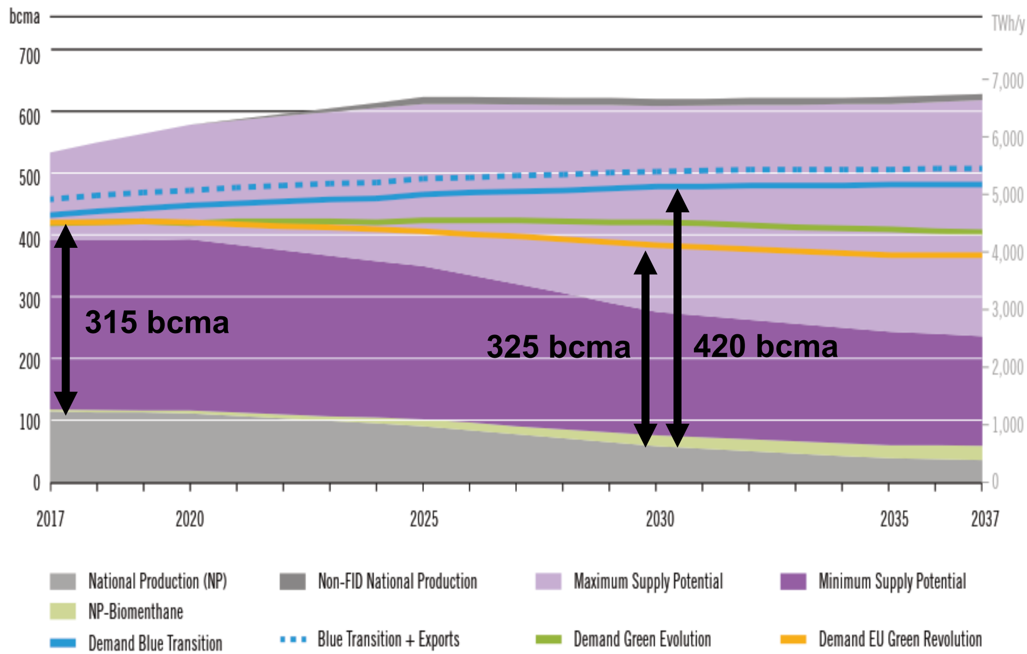
High storage capacity and deliverability

- Access to diversified supply sources
- Support to hub price convergence
- Integration of renewable gases and renewable generation
- Resilience to extreme temperatures
- Resilience to diverse disruption events

Still in specific areas further infrastructure needs remain

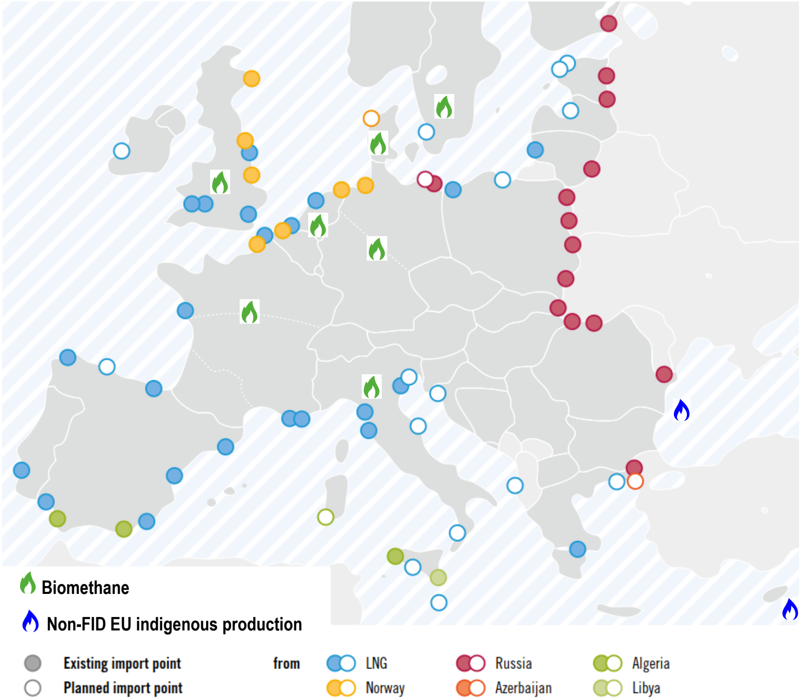
# Infrastructure needs: where and what for?

## To cope with increasing supply needs




Scenarios indicate increasing EU supply needs by 2030

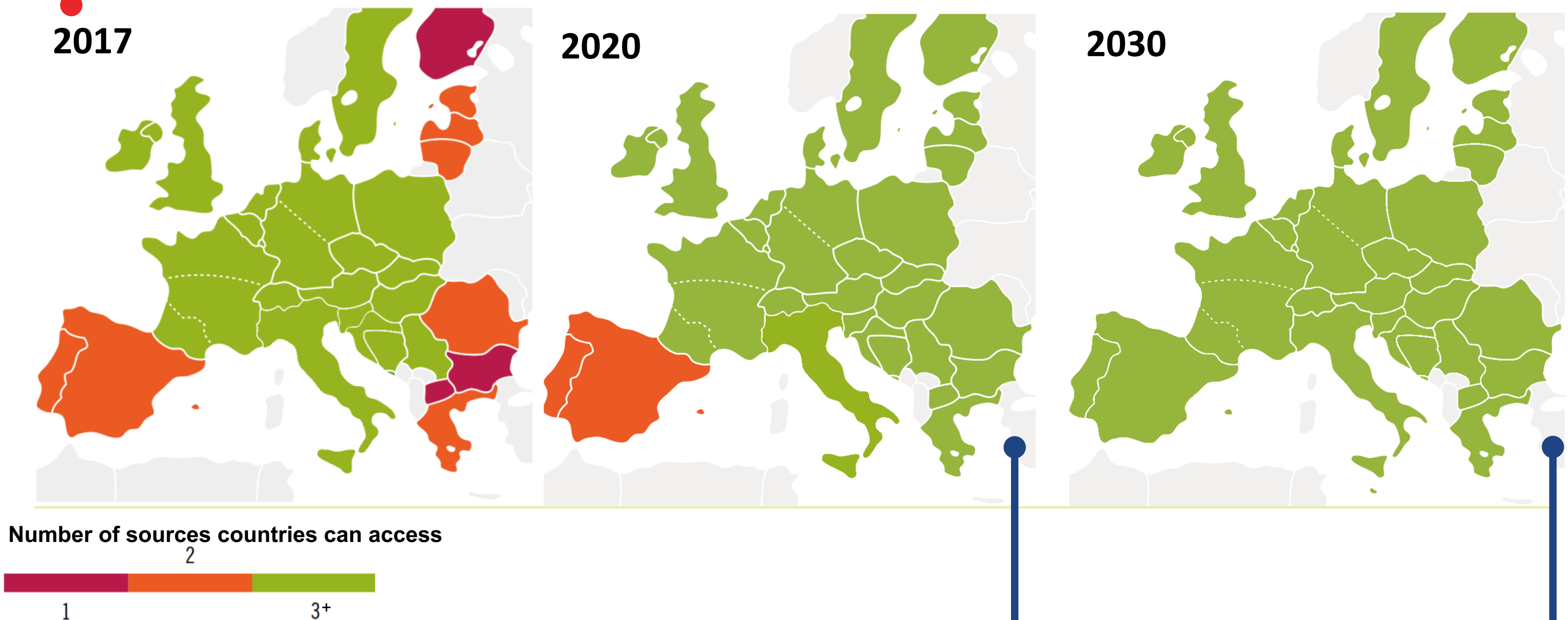
**Access to new supply sources – indigenous or extra-EU – would contribute to maintain supply diversification**



# Infrastructure needs: where and what for?

## To ensure EU-wide supply diversification

**Several areas have significant access only to 1 or 2 supply sources**



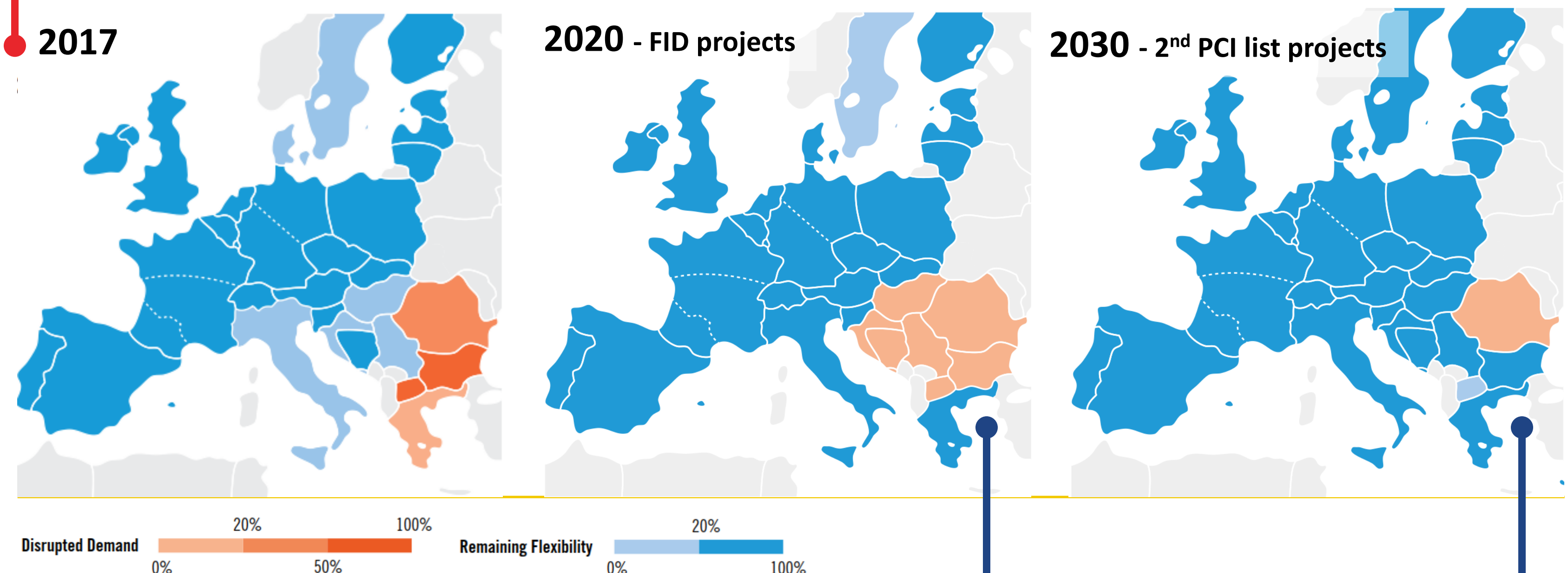

**FID and advanced projects from 2nd PCI list would ensure access to at least 3 supply sources in Baltics, South-East EU and Iberian peninsula**

# Infrastructure needs: where and what for?

## To ensure security of supply

**Peak demand situation**

**South-East Europe is still exposed to Ukraine disruption**




**FID projects significantly mitigate the situation by 2020, 2nd PCI list projects allow further mitigation**

# Focus on Balkans: projects


See more on TYNDP 2017 Project Map

https://www.entsog.eu/public/uploads/files/publications/TYNDP/2017/ENTSOG_TYNDP_2017_A0_1189x841.pdf

# Projects in CESEC countries

## *FID projects to be commissioned by 2025*

| Code | Name | Country | Promoter | Status | Commissioning Year |
|---|---|---|---|---|---|
| UGS-F-259 | **Bordolano first phase** | Italy | STOGIT | FID | 2016 |
| TRA-F-029 | **Romania-Bulgaria Interconnection (EEPR-2009-INTg-RO-BG)** | Romania | SNTGN Transgaz SA | FID | 2016 |
| TRA-F-1047 | **Exit Capacity Budince** | Slovakia | eustream, a.s. | FID | 2016 |
| TRA-F-334 | **Compressor station 1 at the Croatian gas transmission system** | Croatia | Plinacro Ltd | FID | 2017 |
| LNG-F-147 | **Revythoussa (2nd upgrade)** | Greece | DESFA S.A. | FID | 2017 |
| TRA-F-137 | **Interconnection Bulgaria - Serbia** | Bulgaria | Ministry of Energy | FID | 2018 |
| TRA-F-378 | **Interconnector Greece-Bulgaria (IGB Project)** | Bulgaria | ICGB a.d. | FID | 2018 |
| TRA-F-214 | **Support to the North West market and bidirectional cross-border flows** | Italy | Snam Rete Gas S.p.A. | FID | 2018 |
| TRA-F-86 | **Interconnection Croatia/Slovenia (Lučko - Zabok - Rogatec)** | Croatia | Plinacro Ltd | FID | 2019 |
| TRA-F-051 | **Trans Adriatic Pipeline** | Greece | Trans Adriatic Pipeline AG | FID | 2019 |
| UGS-F-1045 | **Bordolano Second phase** | Italy | STOGIT S.p.A. | FID | 2019 |
| TRA-F-1028 | **Albania - Kosovo Gas Pipeline** | Albania | Min. of Energy and Industry of AL & Min. of Economic Development of KO | FID | 2022 |

## *And also*

> 25 projects with an Advanced status

> Even more projects with a less advanced status

# Conclusion

***The gas infrastructure is already well developed***

- It is close to achieve the EU internal gas market
- It is ready to support a low-carbon future

***But the energy situation is not the same all over Europe***

- In specific areas, further infrastructure is still needed
- The necessary projects are to be commissioned in the coming years

***More on TYNDP:***

***http://www.entsog.eu/publications/tyndp#ENTSOG-TEN-YEAR-NETWORK-DEVELOPMENT-PLAN-2017***

# Thank You for Your Attention

Céline Heidrecheid – System Development Business Area Manager
Stefan Greulich – System Develoment Adviser

ENTSOG -- European Network of Transmission System Operators for Gas
Avenue de Cortenbergh 100, B-1000 Brussels

EML: Celine.heidrecheid@entsog.eu Stefan.greulich@entsog.eu
WWW: www.entsog.eu