

TYNDP 2017 Projects

TYNDP 2017 Transparency Process

Stefano Astorri
System Development Adviser

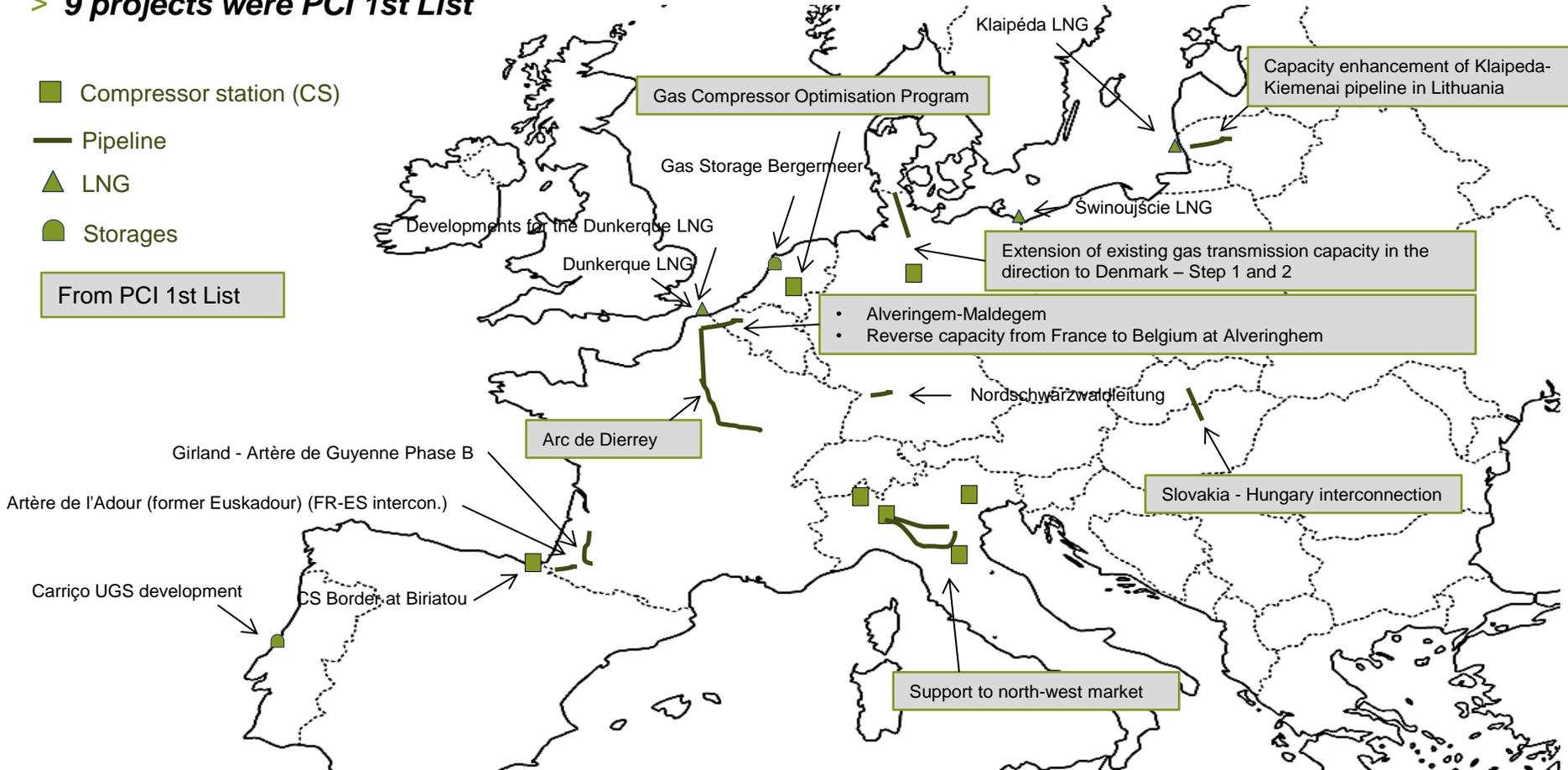


Commissioned projects

- > 19 projects commissioned since TYNDP 2015
- > 9 projects were PCI 1st List

- Compressor station (CS)
- Pipeline
- ▲ LNG
- Storages

From PCI 1st List



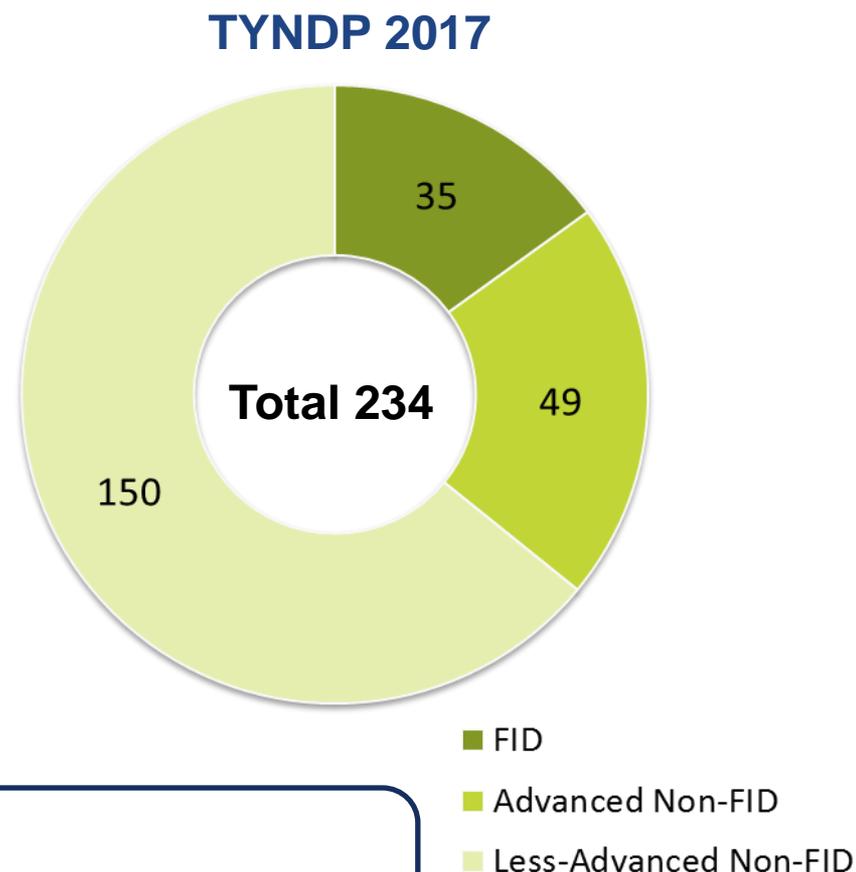
Overview of TYNDP 2017 projects

Significant project progress since TYNDP 2015

17 projects took their FID

8 projects reported earlier commissioning date

49 Advanced-non FID projects



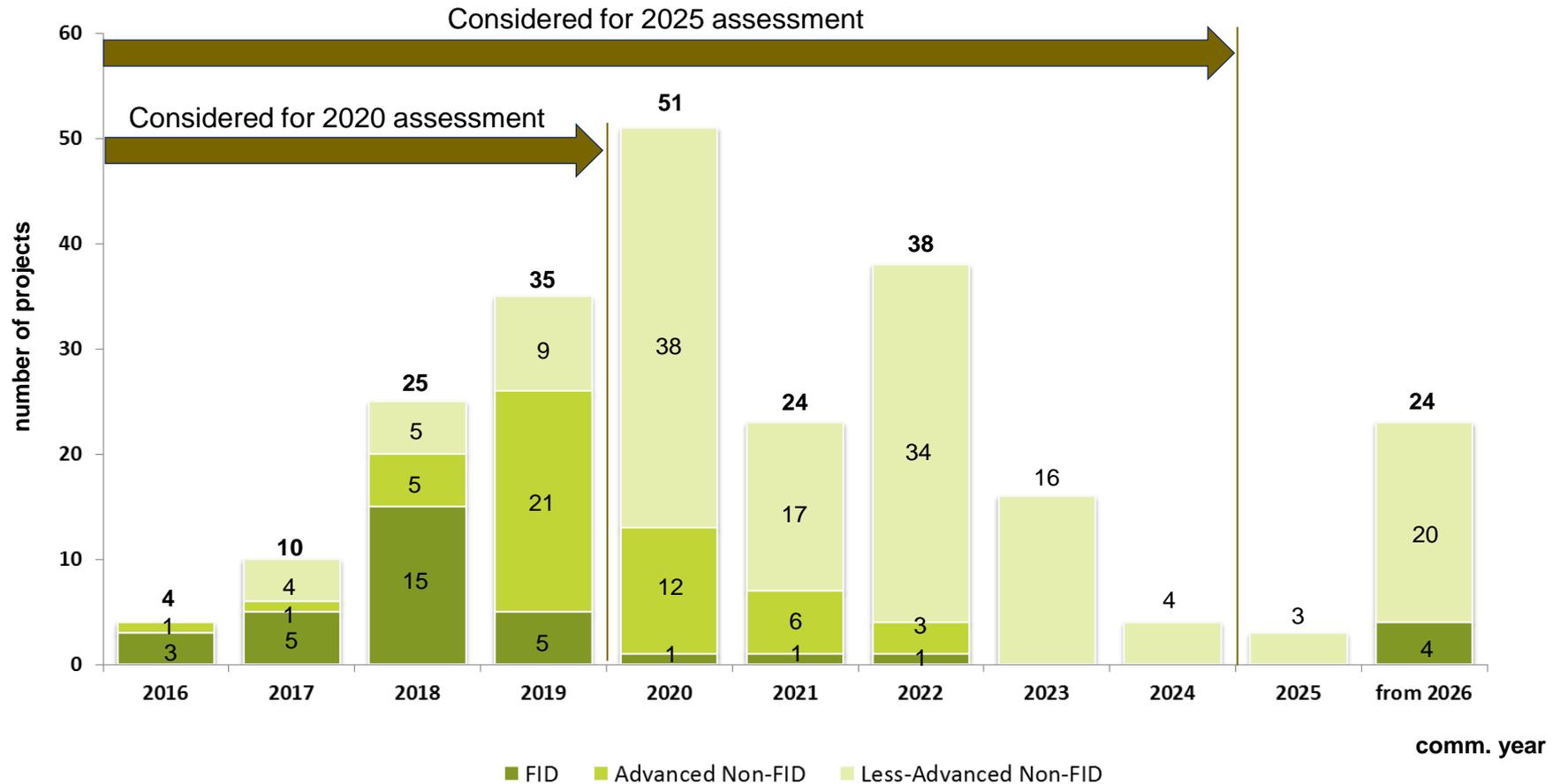
In TYNDP, projects correspond to “single items”.

For example:

- an interconnector between 2 Countries will be considered as 2 projects
- in case of different phases we will have multiple projects



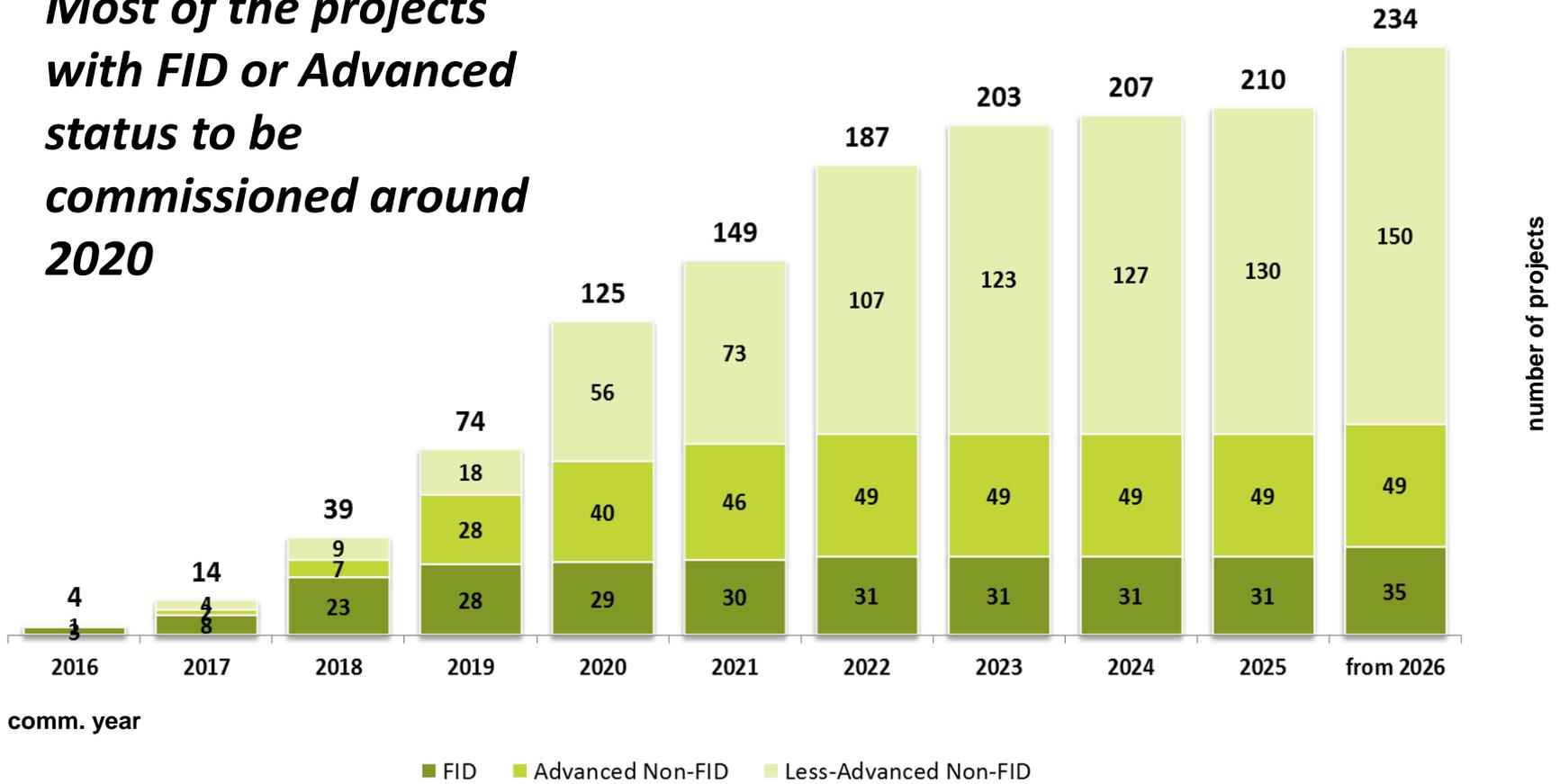
Projects per commissioning year





Cumulative projects timeline

Most of the projects with FID or Advanced status to be commissioned around 2020

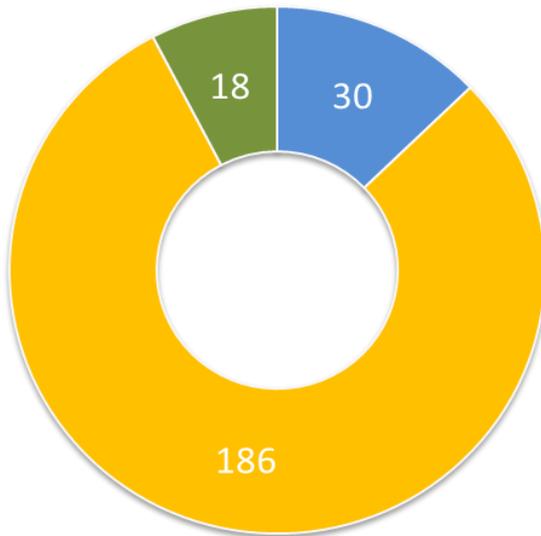




Projects by type

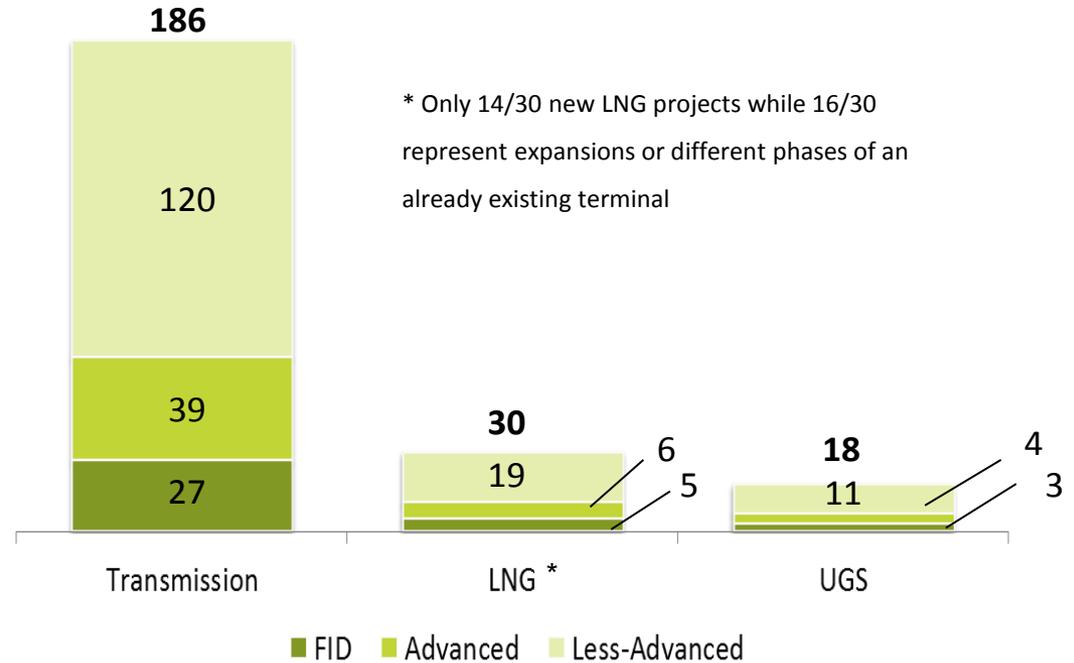


submitted projects by type



■ LNG ■ Transmission ■ UGS

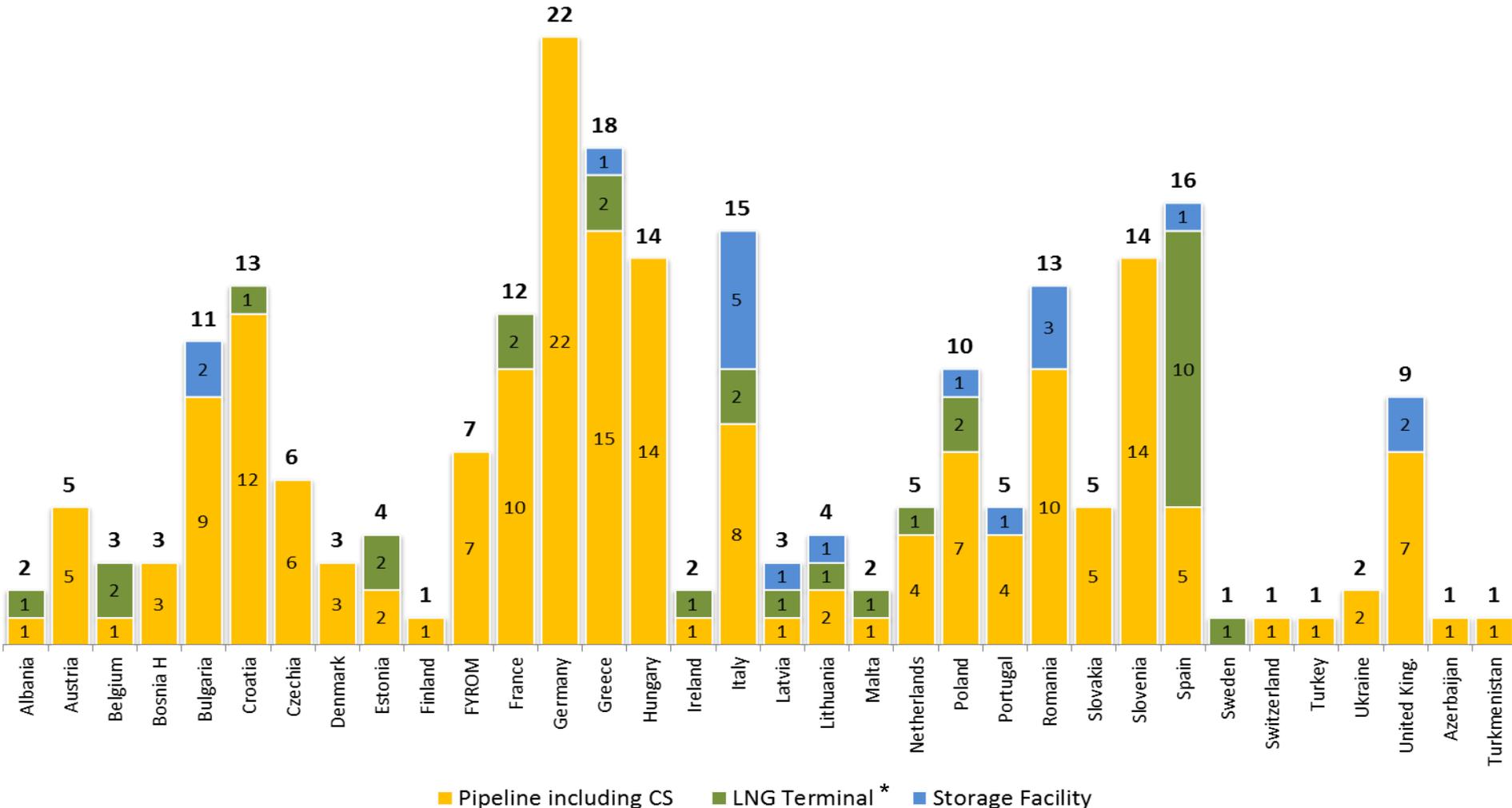
projects by type and status



- > 48 projects not modelled since:
 - > 46 are internal projects
 - > 2 outside TYNDP perimeter (SCP FX and Trans-Caspian)



Projects by type and Country

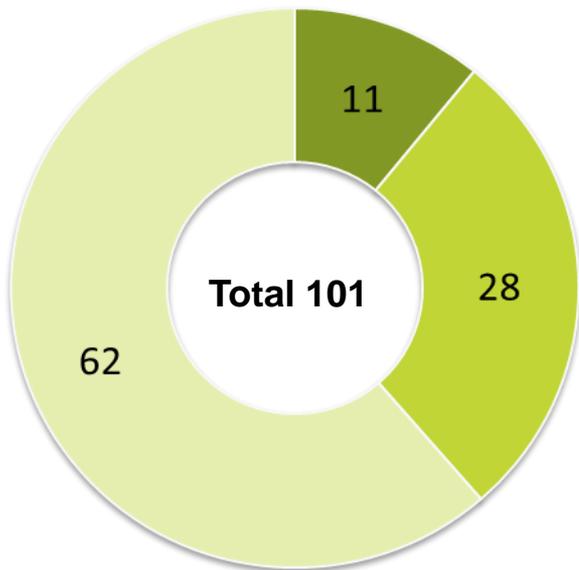


■ Pipeline including CS
 ■ LNG Terminal*
 ■ Storage Facility

* Only 14/30 new LNG projects while 16/30 represent expansions or second/third phase of an already existing terminal

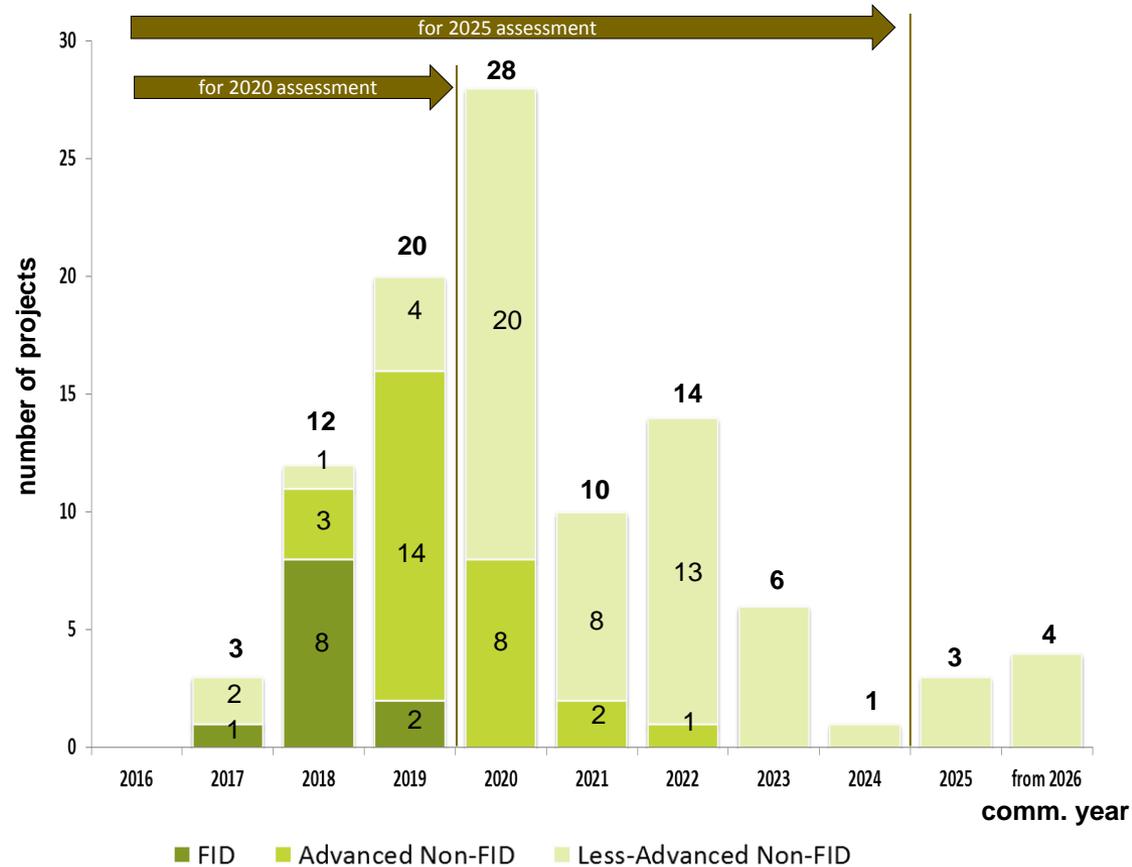
2nd PCI list projects

submitted PCI projects in TYNDP 2017 by status



"...for all ... Union lists adopted, proposed gas infrastructure projects ... shall be part of the latest available 10-year network development plan for gas, developed by the ENTSO for gas...."

PCI projects per commissioning year



Projects per infrastructure level

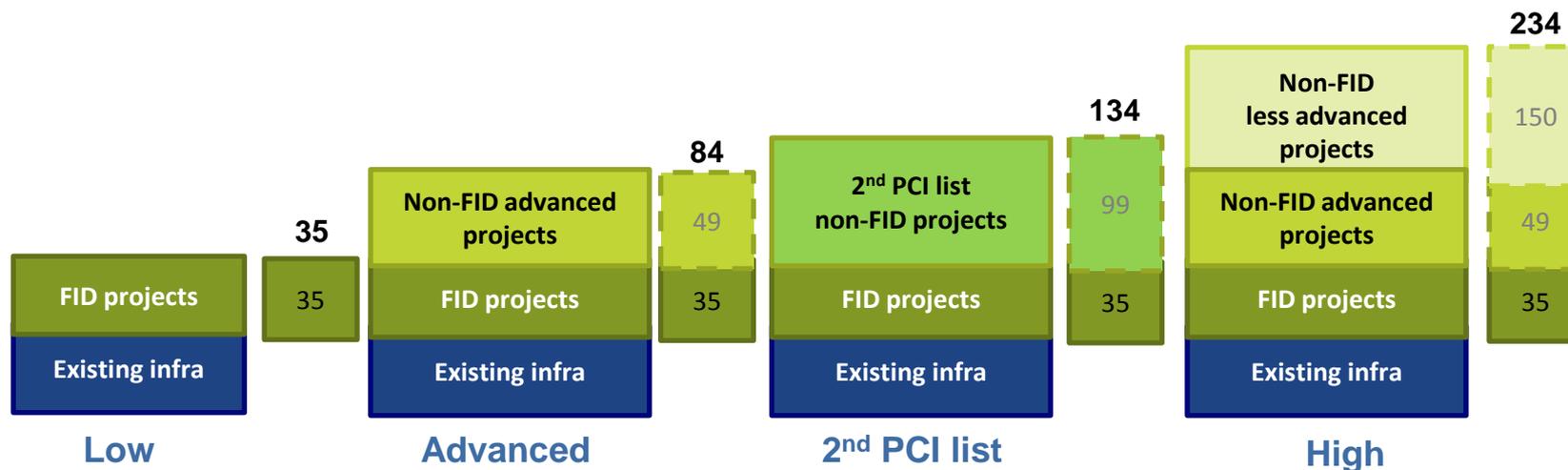
Four infrastructure levels modelled in TYNDP 2017

Assessment of the Infrastructure gap on the Low infra level

The TYNDP assesses if, as a whole, the projects belonging to each Infrastructure Level close the Infrastructure gap

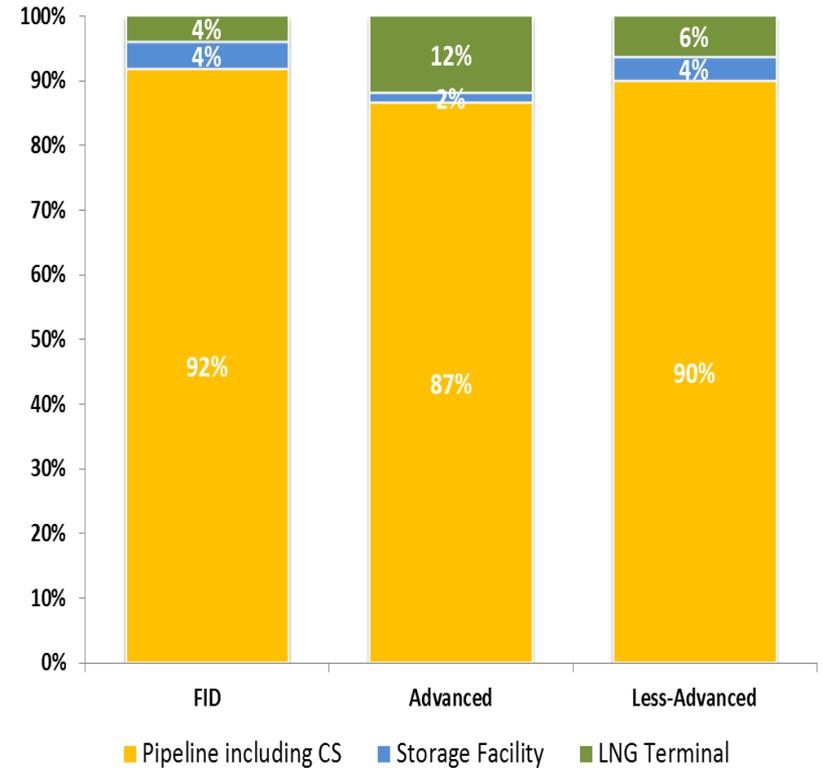
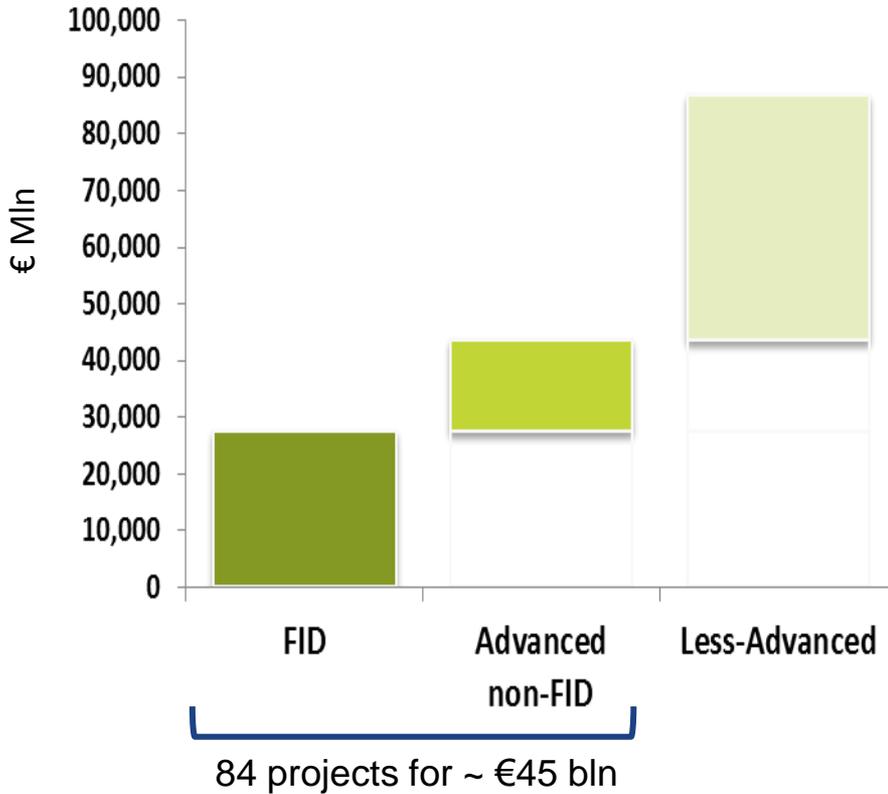
Advanced infrastructure level introduced in TYNDP 2017

> improved basis for grid development assessment and project-specific assessment





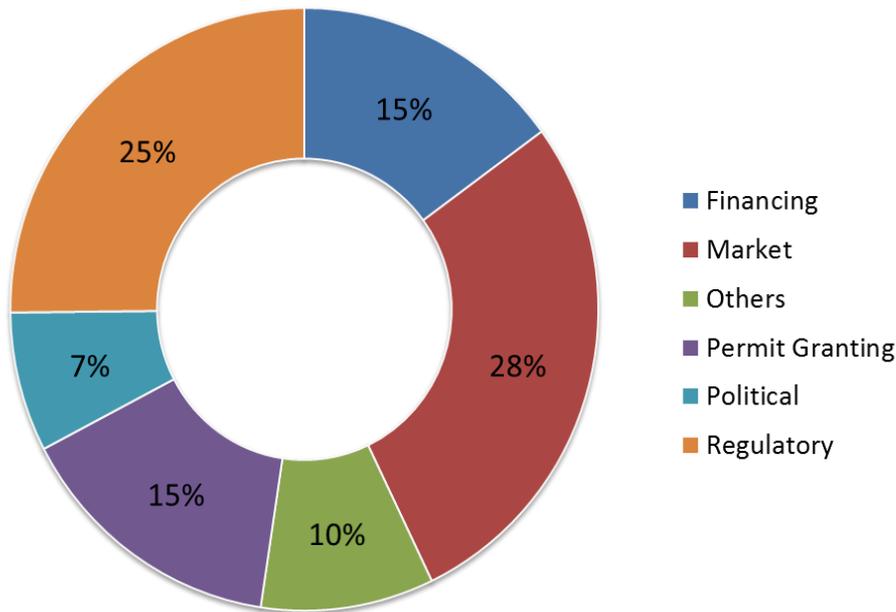
Project costs: an aggregated approach



- > Info on costs provided with a range between min and max
- > FID and Advanced projects show a lower variation between min and max



Barriers to investment



compared to TYNDP 2015, 54 projects were delayed (37 projects from PCI 2nd List) mainly due to

- > worsened and uncertain market conditions
- > delays in permitting/authorizations from competent authorities
- > lack of coordination between hosting Countries/political uncertainties
- > delays in contract award procedure
- > lack of funds/financing
- > delay resulting from concluded pre-feasibility study



FID projects per Country

35 FID projects

- > 27 pipeline projects
- > 5 LNG projects
 - > 3 in Spain (Tenerife, Gran Canaria, Musel)
 - > 1 in Greece (Revithoussa)
 - > 1 in Belgium (Zeebrugge)
- > 3 storage projects in Italy





Advanced projects per Country

49 Advanced non-FID projects

- > 39 pipeline projects
- > 6 LNG projects in
 - > Croatia (Krk project)
 - > Greece (Alexandroupolis)
 - > Latvia (Skulte)
 - > Estonia (Paldiski)
 - > Sweden (Gothenburg)
 - > Italy (Porto Empedocle)
- > 4 storage facilities
 - > 2 in Italy (Palazzo Moroni & Collalto)
 - > 1 in Latvia (Incukalna)
 - > 1 in Romania (Depomures)





Thank You for Your Attention

Stefano Astorri
System Development Adviser

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

EML: Stefano.Astorri@entsog.eu

WWW: www.entsog.eu