Public Consultation

**Introduction**

TYNDP assesses the gas infrastructure over the next 20 years: it provides the supply adequacy outlook, assesses the resilience of the gas system, identifies the infrastructure needs and assesses how projects submitted to the TYNDP mitigate these needs. It provides insight on the demand, supply and project information used to perform the assessment.

TYNDP is an ever-improving process that engages stakeholders throughout its development.

We now consult on the TYNDP report, with two main objectives:

* Get your feedback on **TYNDP 2017**, which together with ACER Opinion, will be used to publish the final version in April 2017
* Consider what can be improved for the already started **TYNDP 2018** process and the TYNDP 2018 deliverables

**The consultation will be open from 20 December 2016 to 3 February 2017.**

This consultation is composed of 6 main parts: 5 covering the TYNDP 2017 main report and the corresponding annexes and 1 for TYNDP 2018. You will have the possibility to provide your feedback to all or only some of the parts. Responses have to be provided on-line and to include the respondent name and company. The on-line consultation is available at this [link](https://www.surveymonkey.com/r/3K8CCXK).

Transparency towards stakeholders is a key feature of TYNDP. ENTSOG will publish the aggregated outcome of this consultation and possibly the individual responses.

**TYNDP information**

The TYNDP 2017 Executive Summary, Main Report and Annexes are available at this [link](http://entsog.eu/publications/tyndp#ENTSOG-TEN-YEAR-NETWORK-DEVELOPMENT-PLAN-2017).

**Upcoming events**

* On 23 January 2017 ENTSOG will present TYNDP 2017 to stakeholders.
* A workshop will be organised at a later date to enable stakeholders to further express their views
* In April 2017, after collecting stakeholder feedback and receiving ACER Opinion, TYNDP 2017 will be published as final
* TYNDP 2017 also constitutes a key element of the ongoing 3rd PCI selection

**NOTA: If you choose not to provide input for one or several chapters, the numbering of the following questions on the website will differ from this document.**

**Identification**

1. What is your name? [mandatory]
2. What is your organisation? [mandatory]
3. What is your email address? [mandatory]
4. How would you describe your organisation? Association (specify), Project promoter, end user, network user, trader, other (specify)?
5. ENTSOG intends to publish the results of this public consultation. If your response should remain confidential, please indicate it below.
   1. My response should only be disclosed anonymously
   2. My response should not be disclosed
   3. Please indicate why (free text – 1000 characters at most)

**General information**

1. Do you have a former experience in reading ENTSOG and/or ENTSO-E TYNDPs?
   1. ENTSOG TYNDP 2015
   2. ENTSO-E TYNDP 2016
   3. None
2. Did you participate in the ENTSOG TYNDP 2017 Stakeholder engagement process?
   1. Yes
   2. No
3. If yes, please select the prior event(s) to which you participated:
   * 1. TYNDP 2017 kick-off workshop – 12 January 2016
     2. SJWS#1 – 13 January 2016
     3. SJWS#2 – 26 January 2016
     4. SJWS#3 – 9 February 2016
     5. SJWS#4 – 23 February 2016
     6. SJWS#5 – 10 March 2016
     7. TYNDP Workshop – 11 May 2016
     8. Early transparency workshop (SJWS#6) – 13 July 2016
4. What are the TYNDP elements most valuable for your activity? [tick boxes – multiple choices possible]
   1. Demand scenarios
   2. Supply potentials
   3. Information on projects
   4. Barriers to investment
   5. Identification of the infrastructure needs
   6. Assessment of TYNDP projects and TYNDP modelling results provided in Annex E
   7. Information on the TYNDP modelling (Annex F)
   8. Long-term Gas Quality Monitoring Outlook
   9. Other: please specify [1000 characters at most]

**Overview**  
  
This questionnaire is composed of 6 Chapters: see below overview. At the beginning of each section you have the option to provide your input, or skip to the next Chapter.

* TYNDP 2017 - General Feedback
* TYNDP 2017 - Demand
* TYNDP 2017 - Supply
* TYNDP 2017 - Infrastructure
* TYNDP 2017 - Assessment, Energy Transition and Gas Quality Outlook
* TYNDP 2018 – Questions



1. Would you like to provide input to the **General Feedback** section?
   1. Yes
   2. No [conditional : if no, skip to next Chapter]
2. Is TYNDP 2017 easy to read and navigate through?
   1. very easy
   2. easy
   3. difficult
   4. very difficult

[if difficult of very difficult], please specify? [free text – 1000 characters at most]

1. Are the maps, graphs and tables easy to understand?
   1. very easy
   2. easy
   3. difficult
   4. very difficult

[if difficult of very difficult], please specify? [free text – 1000 characters at most]

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1. ENTSOG organised a workshop in July 2016 to inform stakeholders on the input data to TYNDP and subsequently published this data on its website: demand, supply, gas quality, information on projects. Has this been useful to you?
   1. Yes
   2. No

Please specify: [free text – 1000 characters at most]

1. ENTSOG introduced a number of new elements in TYNDP 2017. Please indicate which 3 you find the most valuable? [multiple choice up to 3]
   1. Indication how TYNDP scenarios comply with the EU energy and climate targets
   2. Further consideration of ENTSO-E TYNDP scenario information
   3. Qualitative approach to LNG embedded diversification
   4. Advanced project status
   5. Indication of project costs
   6. Energy Transition chapter
   7. Long-term gas quality monitoring outlook
   8. Common data set used for TYNDP 2017 and GRIPs 2017
   9. TYNDP 2017 map
   10. Other, please specify [free text – 1000 characters at most]
2. Do some TYNDP elements require better explanation? Which ones? [free text – 2000 characters at most]
3. Is there additional information you would like to find in TYNDP? [free text – 2000 characters at most]
4. TYNDP is made up of the Main Report and Annexes. The Main Report is an in-depth document. Once final, it may or not be published as a printed version. Annexes are made available only in electronic format. Would you appreciate to have the TYNDP Main Report available only in electronic version?
   1. Yes
   2. No
5. Which are the TYNDP elements you consider the Main Report should focus on?
   1. Demand chapter
   2. Supply chapter
   3. Infrastructure chapter
   4. Barriers to Investment chapter
   5. Assessment chapter
   6. Energy Transition chapter
   7. Gas Quality Outlook Chapter
   8. Other. Please specify [free text – 1000 characters at most]

Please specify your indications below, and indicate if there are elements of the selected chapter(s) that you consider could be left out of the Main Report:  
[free text – 1000 characters at most]

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The **Demand chapter** reviews historical gas demand evolution, provides an analysis per sector, describes in detail the demand scenarios and how they achieve the EU 2030 energy and climate targets, informs on the commodity prices retained and offers a detailed analysis of the data for the different scenarios. This chapter is supported by Annex C1 (country specifics on collected data), Annex C2 (demand data), Annex C3 (power generation assumption data) and Annex C4 (demand methodology).

1. Would you like to provide input to the **Demand** section?
   1. Yes
   2. No [conditional : if no, skip to next Chapter]
2. ENTSOG developed four demand scenarios: three were designed as differentiated paths towards achieving the EU 2030 energy and climate targets (Blue Transition, Green Evolution, EU Green Revolution), and one as failing to achieve these targets (Slow Progression). These differentiated paths are intended to provide the future frame under which to assess the gas infrastructure. Would you consider this provides a comprehensive view on the future role of gas?
   1. Yes
   2. No
   3. Explanation
3. TYNDP indicates how scenarios comply with the EU 2030 energy and climate targets. Do you see that as an important element of TYNDP?
   1. Yes
   2. No
   3. Explanation
4. Regarding the role of gas generation in the power sector, ENTSOG aligned its scenarios with the Visions developed in ENTSO-E TYNDP 2016 Scenario Report, and elaborated the scenario data using ENTSO-E generation data, together with national expertise. Do you have additional views on this approach? (free text – 2000 characters at most)
5. For all four demand scenarios, the TYNDP provides a detailed analysis in the Demand Chapter. The Slow Progression scenario does not achieve the EU 2030 targets and has a total gas demand evolution that falls between the other scenarios. As a result, the TYNDP assessment focuses on the three scenarios achieving the EU 2030 targets. Do you support this approach?
   1. Yes
   2. No.

If no, why? [free text – 1000 characters at most]

1. For all four demand scenarios, the demand data is available in Annex C2. Is this information useful to you?
   1. This information is useful to me
   2. I find this information interesting, but I do not directly use it
   3. This information is not useful to me

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The supply chapter gives a view on historic supply and provides the supply potentials over the 20 next years for Russian, Norwegian, Algerian, Libyan, Azeri supplies and LNG, based on publicly available information, as well as for European indigenous production.

1. Would you like to provide input to the **Supply** section?
   1. Yes
   2. No [conditional : if no, skip to next Chapter]
2. Based on stakeholder feedback, some elements of the supply potential approach have been changed in TYNDP 2017 from the last edition. TYNDP 2017 takes a “tomorrow as today” approach for the supply potentials for 2017, in line with the approach retained for Seasonal Outlooks. Do you support this?
   1. Yes
   2. No

If no, why [free text – 1000 characters at most]

1. Based on stakeholder feedback, some elements of the supply potential approach have been changed in TYNDP 2017 from the last edition. TYNDP 2017 focuses on the range between minimum and maximum potentials per source, as further used in the assessment. It discontinues the intermediate potential showed in TYNDP 2015, which is not used in the assessment. Do you support this?
   1. Yes
   2. No

If no, why [free text – 1000 characters at most]

1. TYNDP 2017 takes a qualitative approach to the embedded diversification of the LNG supply, based on expert views provided by GLE (Gas LNG Europe). Do you welcome this qualitative approach supported by expert views?
   1. Yes
   2. No

If no, why [free text – 1000 characters at most]

1. Some potential supply sources are not included in the TYNDP assessment as they are considered as having a high level of uncertainty. They are nevertheless investigated in the supply chapter (such as gas from Turkmenistan, Iran, Egypt and Israel). Do you see benefits in covering those uncertain sources in the supply chapter?
   1. Yes
   2. No
   3. Please specify:

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The Infrastructure chapter provides a detailed overview of gas infrastructure projects as submitted to TYNDP 2017, including in terms of progress since the previous TYNDP and regarding overall investment costs. The Barriers to Investment chapter analyses the obstacles to future investment in gas infrastructure as perceived by project promoters. These chapters are supported by Annex A which provides information on the projects submitted as well as project fiches, and by the Annex B TYNDP Project Map.

1. Would you like to provide input to the **Infrastructure** section?
   1. Yes
   2. No
2. In addition to the FID status (for projects having taken their final investment decision) TYNDP 2017 defines an advanced project status, to distinguish between advanced and less-advanced non-FID projects. TYNDP 2017 assessment subsequently focuses on what the FID and advanced projects achieve. Do you consider this provides a realistic view on infrastructure development?
   1. Yes
   2. No

If no, please specify why [free text – 1000 characters at most]

1. TYNDP 2017 provides the overall investment costs for projects of a given status. Do you find this information valuable?
   1. Yes
   2. No

If no, please specify why [free text – 1000 characters at most]

1. TYNDP 2017 is accompanied with a new TYNDP projects map (Annex B). Do you find this information valuable?
   1. Yes
   2. No

If no, please specify why [free text – 1000 characters at most]

1. In this edition, project promoters reported if their project were part of the national plan. Do you find this information valuable?
   1. Yes
   2. No

If no, why [free text – 1000 characters at most]

1. Is there further information on projects that you would like to see reflected in TYNDP? [free text – 2000 characters at most]
2. The Barriers to Investment chapter analyses the obstacles to future investment in gas infrastructure as perceived by project promoters. Do you consider all potential barriers are covered?
   1. Yes
   2. No

If no, which additional barriers would you suggest to consider?

[free text – 1000 characters at most]

1. Annex A provides project-level information, through project fiches and overview tables (including on perceived barriers to investment). Do you find the Annex A format adequate?
   1. Yes
   2. No,

If no, how can we further improve? [free text – 1000 characters at most]

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The Assessment chapter consists of the Supply Adequacy Outlook and the identification of the infrastructure needs. It also assesses the advanced projects and projects of the 2nd PCI list. The chapter is supported by Annex D (topology and capacities), Annex E (modelling results) and Annex F (description of the modelling tool and methodology).

The Energy Transition chapter provides a long-term insight into how gas infrastructure can be an essential part of the future integrated energy system based on sector coupling.

The Gas Quality Outlook aims at a long-term monitoring of gas quality.

1. Would you like to provide input to the Assessment section?
   1. Yes
   2. No
2. ENTSOG endeavoured to increase the usability of the Assessment chapter in different ways. Please specify whether these were useful to you: [Yes / No]
   1. Specific section of the Assessment chapter dedicated to the identification of infrastructure needs.
   2. Assessment of projects focused on the FID and Advanced projects, as well as projects of the previous PCI list as a feedback loop.
   3. Presentation of results for the more contrasted demand scenarios (Blue Transition and EU Green Revolution).
   4. Focus on a limited number of simulations cases (e.g. limited number of contrasted supply configurations)
   5. Inclusion of the supply adequacy outlook in Assessment chapter.

If the item did not prove useful, please specify why:

[free text – 1000 characters at most]

1. TYNDP 2017 introduces a country-level monetisation of supply configurations resulting in country-level supply prices. Do you find it valuable?
   1. Yes
   2. No

If no, please specify why? [free text – 1000 characters at most]

1. TYNDP 2017 introduces an assessment based on actual import price information. Do you find it valuable?
   1. Yes.
   2. No

Would you have any suggestion of public information that could be used to support this analysis? [free text – 1000 characters at most]

1. Which elements would you suggest to further improve?

[free text – 2000 characters at most]

1. ENTSOG publishes all TYNDP assessment results in Annex E – Modelling results. Are these results valuable to you?
   1. Yes
   2. No

If yes, Could you indicate in which context? Do you have any suggestion on the format of these results? [free text – 1000 characters at most]

1. ENTSOG provides the description of the modelling tool and modelling methodology as part of Annex F. Is this information valuable to you?
   1. Yes
   2. No

Would you have any suggestion on this Annex? [free text – 1000 characters at most]

1. TYNDP 2017 presents the long-term perspective on the gas infrastructure in the Energy Transition Chapter. Do you want to provide comments? (On how to handle this chapter in the future, please refer to the TYNDP 2018 part of this questionnaire.)
   1. Yes
   2. No

[If yes, free text – 1000 characters at most]

1. TYNDP 2017 includes a long-term gas quality monitoring outlook. Do you consider it valuable that this analysis is included in TYNDP? (On how to handle this outlook in the future, please refer to the TYNDP 2018 part of this questionnaire.)
   1. Yes
   2. No

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ENTSOG intends to release the draft version of its next TYNDP edition in Q3 2018. It will be labelled TYNDP 2018. We welcome your input on how to improve it compared to TYNDP 2017.

1. Would you like to provide input to the **TYNDP 2018** section?
   1. Yes
   2. No
2. Do you have suggestions on how ENTSOG could improve the stakeholder engagement process?
   1. Yes
   2. No

If so, please specify [free text – 1000 characters at most]

1. On which topics do you consider ENTSOG would need specific stakeholder engagement [free text – 1000 characters at most]



ENTSOG and ENTSO-E engaged in a joint scenario development process for their next TYNDP editions (TYNDPs 2018).

1. This process has already started, with a public consultation (12 May – 12 June 2016), workshops (2 June and 5 July 2016) and a Webinar (10 October 2016). Have you been involved in this process?
   1. Yes
   2. No
2. As part of this process, ENTSOG intends to provide the TYNDP 2018 demand and supply elements as part of the joint ENTSOs Scenario Report, planned to be released mid-2017 for public consultation. Do you support this approach?
   1. Yes
   2. No

Further comments [free text – 1000 characters at most]



1. For which supply source do you expect to need the most intense stakeholder involvement?
   * 1. National production – conventional
     2. National production – unconventional
     3. National production – Biomethane & Power-to-gas
     4. Pipeline imports from Russia
     5. Pipeline imports from Norway
     6. Pipeline imports from Algeria
     7. Pipeline imports from Libya
     8. Pipeline imports from Azerbaijan
     9. LNG imports
     10. Others:\_\_\_\_\_\_\_(please specify)
2. TYNDP uses publicly available information to build supply potentials. Would you have specific suggestions on publicly available information ENTSOG could use? Which supply source(s) would that cover? [free text – 1000 characters at most]
3. Do you have any views how to plan for the stakeholder engagement on supply potentials based on the TYNDP 2017 material? [free text – 1000 characters at most]



1. Would you see additional elements regarding infrastructures that could be included in TYNDP 2018? [free text – 2000 characters at most]
2. Would you see additional elements that could be included in the TYNDP 2018 assessment? [free text – 2000 characters at most]

1. Regarding LNG diversification, TYNDP 2018 could maintain the qualitative approach retained for TYNDP 2017 or treat LNG as a multi-source supply including in the TYNDP assessment. This is a question of finding the right balance between the added-value of the information and the potential increased complexity of the assessment. What are your views:
   1. Keeping the same approach as in TYNDP 2017 would provide the necessary insights
   2. Treating LNG as a multi-source supply would bring further added-value to the assessment.

If LNG is to be treated as a multi-source supply, could you specify what added-value you would see in this approach? If the answer above is no, could you specify why? [free text – 2000 characters at most]

1. TYNDP 2017 presents the long-term perspective on the gas infrastructure in the Energy Transition Chapter. Would you agree that this is a topic of long-term relevance and that it should be covered in TYNDP 2018?
   1. Yes
   2. No

Are there additional elements you would suggest to include? If the answer above is no, could you specify why? [free text – 1000 characters at most]

1. TYNDP 2017 introduces for the first time a long-term gas quality monitoring outlook. Would you have any suggestion how to further develop this analysis in TYNDP 2018? (e.g. including additional parameters, defining other inputs for the reference values of gas quality parameters, sharing views on the evolution of these parameters, etc.)
   1. Yes
   2. No

Please provide your suggestions [free text – 1000 characters at most]

1. Do you have other expectations regarding TYNDP 2018?

[free text – 2000 characters at most]

**[Last page of consultation]**

1. Do you have any other comment to TYNDP 2017 [free text – 2000 characters at most]

**Thank you for completing this questionnaire. Your responses will help us finalising TYNDP 2017 and improving TYNDP 2018.**