



Status report on TYNDP preparation

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Florence Forum 11 December 2009



Reminder : the 10yNDP in EU Regulation

- **A non-binding plan, updated every 2 years**
 - Regulators to check consistency with National DP
- **A vision for the future European HV grid**
 - “Derived from reasonable needs of system users”
 - A generation adequacy outlook (5/15 years)
 - A modelling of integrated networks
 - Assessment of most probable power flow patterns,
 - Investment gaps and investment projects
 - A review of barriers to increase capacities



Strong stakeholders' expectations:

the 10yNDP shall...

- “Present a clear development framework”
 - “Show what transmission capacity is needed & when”
- “Develop numerous background scenarios”
 - “Derive power flows patterns from market studies”
 - “10yNDP all encompassing”
- “Open the eyes of decision makers”
 - “Show that political decisions have their cost”
- “Detail the methodology”
 - “Specify the criteria”
- “Involve stakeholders in the process”
- ...



Proposed goals for 10yNDP

- **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**



Objectives of the first issue

- **Based on existing material**
 - Stakeholders statements in 2009
 - Review of TSOs practices, projects, ...
 - Definition of scenarios despite 20/20/20 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



Proposed content

- Introduction
- Presentation of the European System
- Challenges for grid development
- **Background scenarios**
 - Generation Adequacy, market analysis
- **Grid bottlenecks** & weaknesses
 - Transmission adequacy
- Planned **transmission projects**
 - Illustration of economic analyses & criteria, resilience
- Technology: state of the art & perspectives
- Conclusion, **toward next releases**
- Appendices

Uncertainties, even
in the short-run

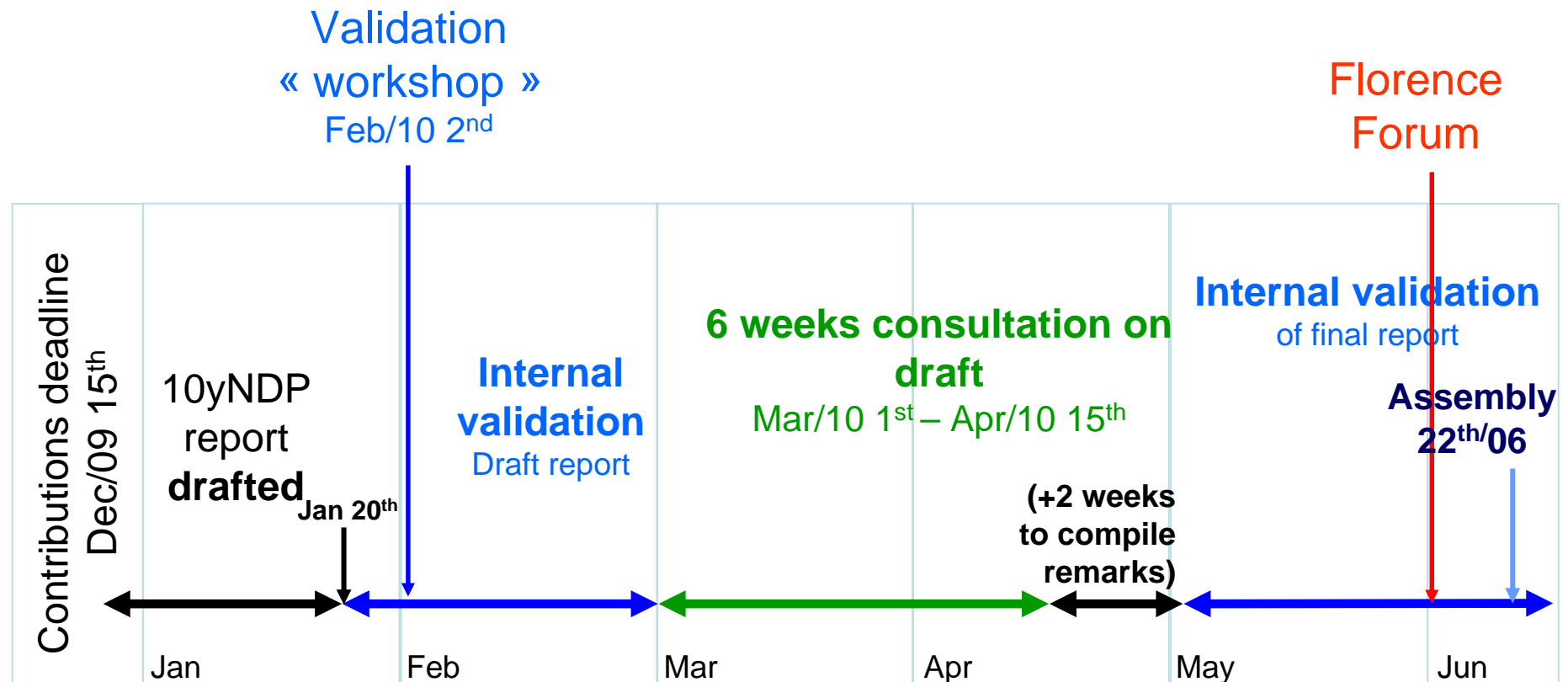
Criteria depend on
local regulation



Time schedule

- **Fall/09: preparation of the draft 10yNDP**
 - Integration of existing material, data collection, adequacy
- **Feb/10: ENTSO-E internal validation of draft**
- **Mar/10: official consultation process on draft**
 - What kind of information is useful?
- **Jun/10: release of the first 10yNDP**
 - Highlighting a refined roadmap toward further releases
 - *... notwithstanding with the development of bricks of methodology & procedure for the next issue **in parallel***

TYNDP pilot project synthetic schedule

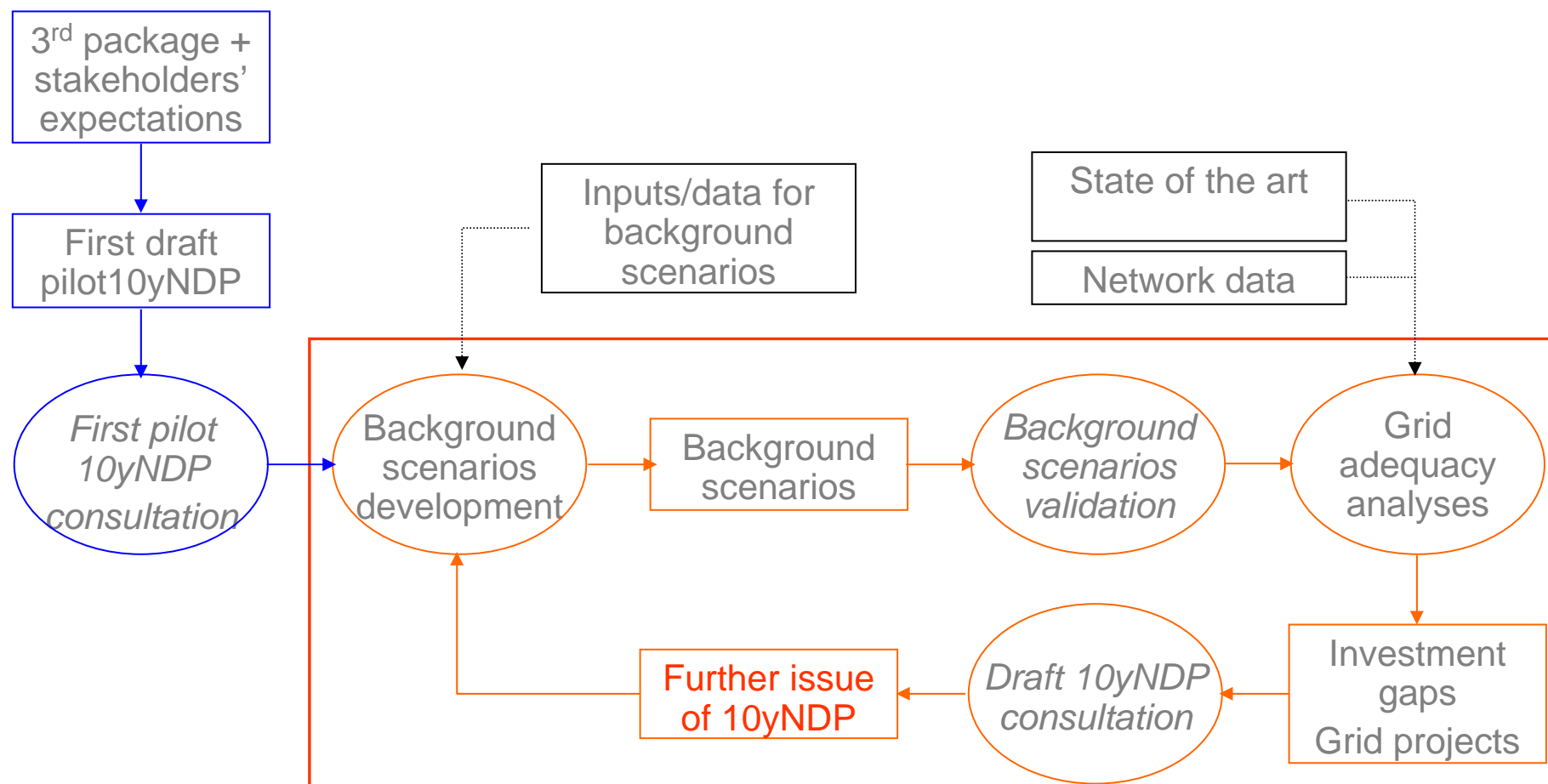




Developing grid evolution perspectives: a long-run process, involving all stakeholders

- TSOs will 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

Initiate the long run building-up process





On going activities

- **Informal « upstream » consultation process**
 - Objective : to build long term positive relationship with stakeholders
 - Eurelectric, EFET, EWEA, ERGEG, DG Tren, Market Observatory for Energy, IFIEC, GTE+....
- **Gather information on existing plans and 20/20/20 materials (questionnaire)**
- **Workshops with ENTSO-E Regional groups**
- **Coordination with EWIS project**
- **System Adequacy Forecast : study going on**
- **Prepare lay-out of the report**



Thank you for your attention