

# TYNDP 2017

ANNEX H

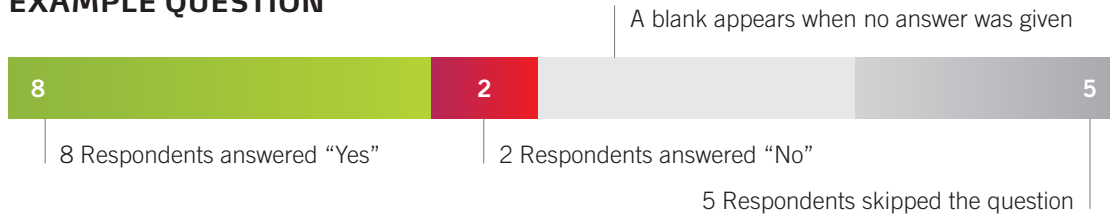
FEEDBACK

H 2: PUBLIC CONSULTATION: DATA SUMMARY

ENTSO-G – A FAIR  
PARTNER TO ALL!

Twenty-one stakeholders (representing network users, project promoters, Member States, NGOs, academics) took part to the consultation. The results are presented in the following way:

### EXAMPLE QUESTION



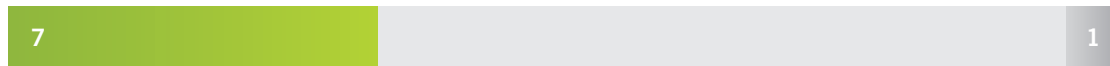
### QUESTIONS 1, 2, 3

Respondent Info

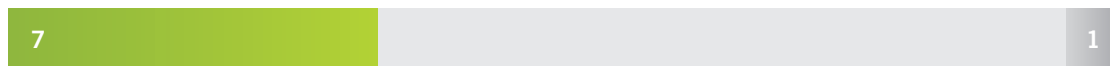
### QUESTION 4

How would you describe your organisation?  
(Please choose only the category which best represents your organisation)

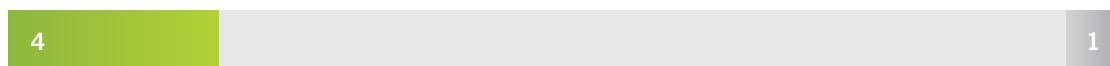
#### Project promoter



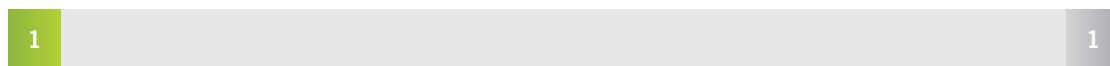
#### Other (please specify)



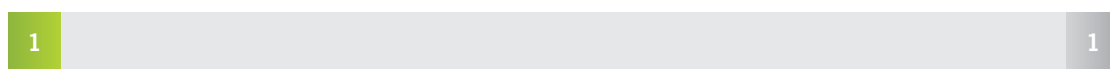
#### Association (please specify type)



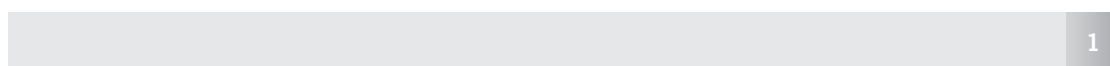
#### Network user



#### Trader



#### End user



## QUESTION 5

ENTSOG intends to publish the results of this public consultation.  
If your response should remain confidential, please indicate it below.

**My response should only be disclosed anonymously**



**My response should not be disclosed**



## QUESTION 6

Do you have a former experience in reading ENTSOG and/or ENTSO-E TYNDPs?

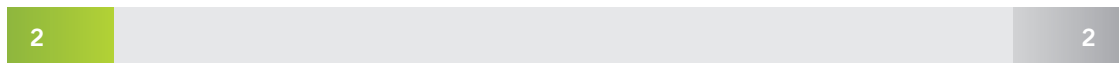
**ENTSOG TYNDP 2015**



**ENTSO-E TYNDP 2016**



**None**



## QUESTION 7

Did you participate in the TYNDP 2017 Stakeholder engagement process?





## QUESTION 8

If yes, please select below the prior event(s) to which you participated:

### TYNDP 2017 kick-off workshop – 12 January 2016



### TYNDP Workshop – 11 May 2016



### SJWS#1 – 13 January 2016



### SJWS#3 – 9 February 2016



### SJWS#4 – 23 February 2016



### SJWS#5 – 10 March 2016



### SJWS#2 – 26 January 2016



### Early transparency workshop (SJWS#6) – 13 July 2016



## QUESTION 9

What are the TYNDP elements most valuable for your activity?

### Supply potentials



### Demand scenarios



### Information on projects



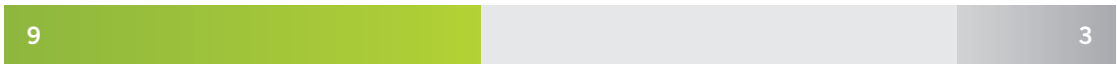
### Identification of the infrastructure needs



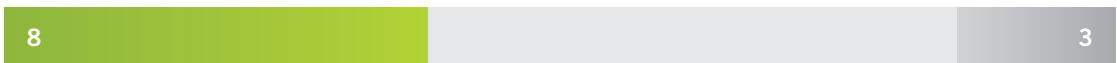
### Assessment of TYNDP projects and TYNDP modelling results provided in Annex E



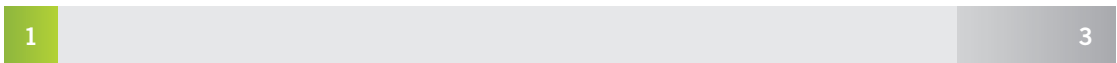
### Information on the TYNDP modelling (Annex F)



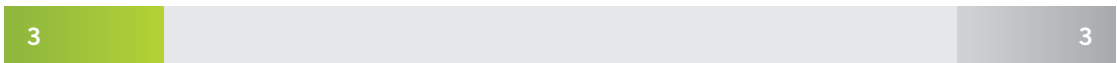
### Barriers to investment



### Long-term Gas Quality Monitoring Outlook



### Other (please specify below)



## QUESTION 10

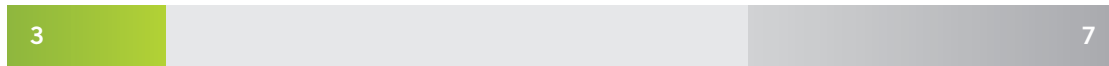
Would you like to provide input to the General Feedback section?



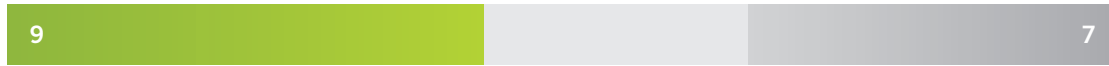
### QUESTION 11

Is TYNDP 2017 easy to read and navigate through?

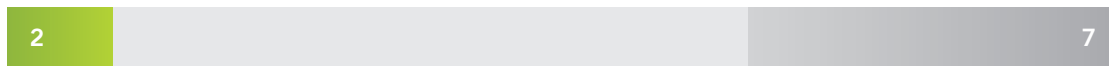
very easy



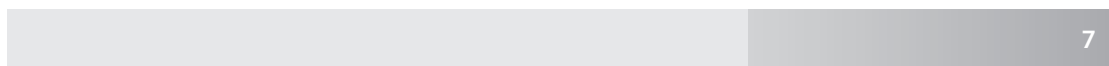
easy



difficult



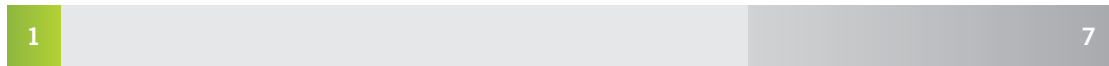
very difficult



### QUESTION 12

Are the maps, graphs and tables easy to understand?

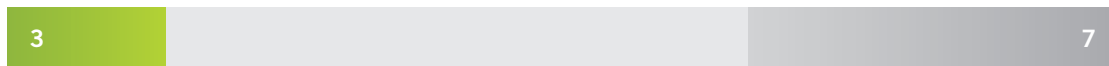
very easy



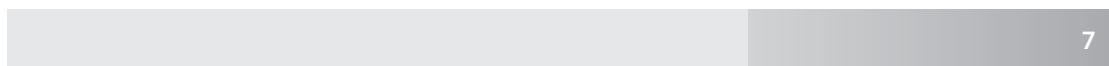
easy



difficult



very difficult



### QUESTION 13

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?



Yes	No	Skipped
1	1	1

## QUESTION 14

ENTSOG introduced a number of new elements in TYNDP 2017.  
Please indicate which three you find the most valuable?

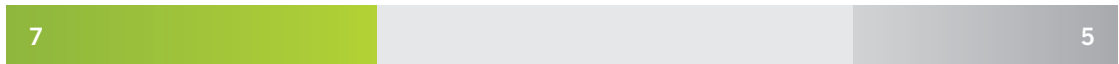
**Indication how TYNDP scenarios comply with the EU energy and climate targets**



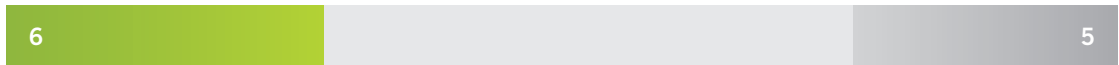
**Advanced project status**



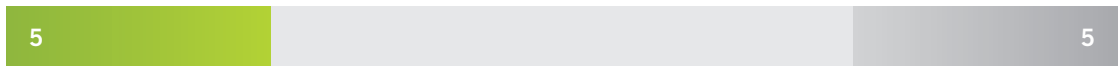
**TYNDP 2017 map**



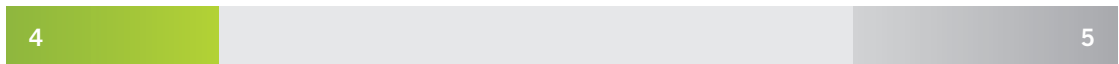
**Further consideration of ENTSO-E TYNDP scenario information**



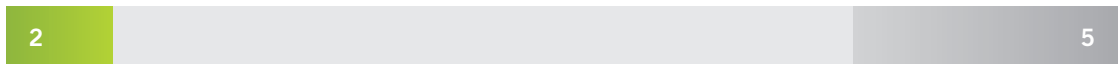
**Qualitative approach to LNG embedded diversification**



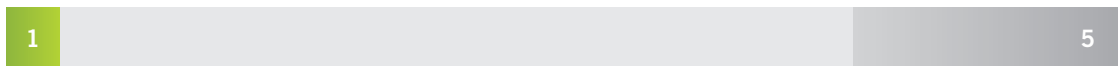
**Indication of project costs**



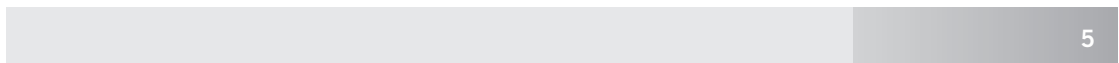
**Energy transition chapter**



**Common data set used for TYNDP 2017 and GRIPs 2017**



**Long-term Gas Quality Monitoring Outlook**



## QUESTION 15

Do some TYNDP elements require better explanation? Which ones?



## QUESTION 16

Is there additional information you would like to find in TYNDP?



Yes	No	Skipped
1	1	1

## QUESTION 17

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?



## QUESTION 18

Which are the TYNDP elements you consider the Main Report should focus on?

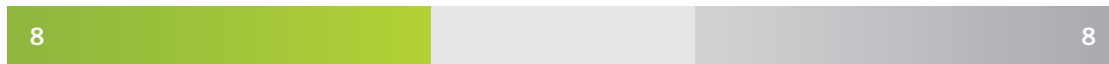
### Infrastructure chapter



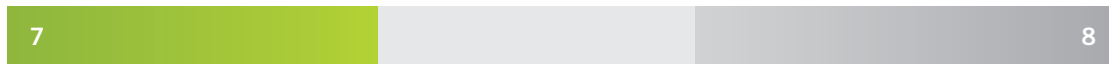
### Supply chapter



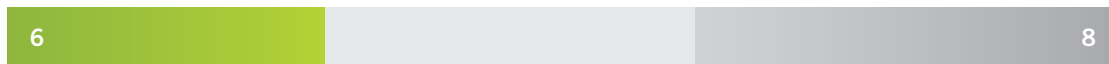
### Demand chapter



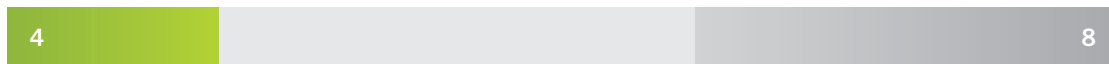
### Assessment chapter



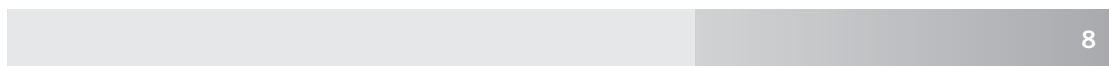
### Energy Transition chapter



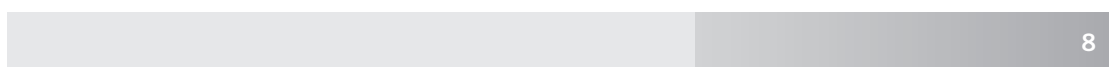
### Barriers to Investment chapter



### Gas Quality Outlook Chapter



### Other



## QUESTION 19

Would you like to provide input to the Demand section?





## QUESTION 20

ENTSO-G 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?



## QUESTION 21

TYNDP indicates how scenarios comply with the EU 2030 energy and climate targets. Do you see that as an important element of TYNDP?



## QUESTION 22

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?



## QUESTION 23

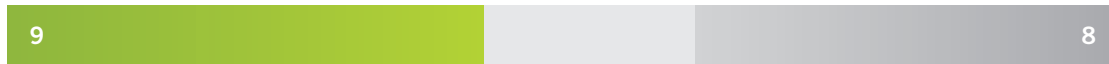
For all four demand scenarios, the TYNDP provides a detailed analysis in the Demand Chapter. The Slow Progression scenario does not achieve the EU 2030 targets and has a total gas demand evolution that falls between the other scenarios. As a result, the TYNDP assessment focuses on the three scenarios achieving the EU 2030 targets. Do you support this approach?



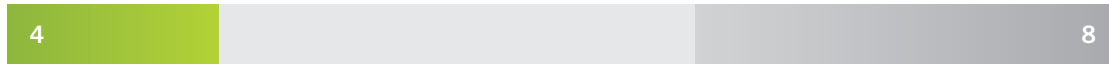
## QUESTION 24

For all four demand scenarios, the demand data is available in Annex C2. Is this information useful to you?

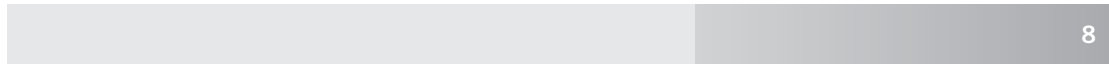
**This information is useful to me**



**I find this information interesting, but I do not directly use it**



**This information is not useful to me**



## QUESTION 25

Would you like to provide input to the Supply section?



## QUESTION 26

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?



## QUESTION 27

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 approach?



### QUESTION 28

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?



### QUESTION 29

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?



### QUESTION 30

Would you like to provide input to the Infrastructure section?



### QUESTION 31

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?



### QUESTION 32

TYNDP 2017 provides the overall investment costs for projects of a given status. Do you find this information valuable?



### QUESTION 33

TYNDP 2017 is accompanied with a new TYNDP projects map (Annex B).  
Do you find this information valuable?



### QUESTION 34

In this edition, project promoters reported if their project were part of the National Plan.  
Do you find this information valuable?



### QUESTION 35

Is there further information on projects that you would like to see reflected in TYNDP?



### QUESTION 36

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?



### QUESTION 37

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?



### QUESTION 38

Would you like to provide input to the Assessment section?



### QUESTION 39

ENTSOG endeavoured to increase the usability of the Assessment chapter in different ways. Please specify whether these were useful to you:

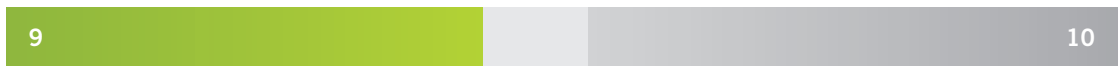
**Specific section of the Assessment chapter dedicated to the identification of infrastructure need**



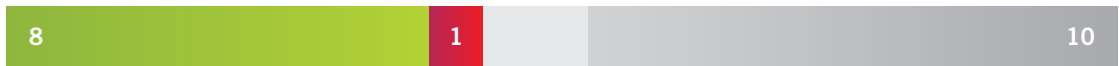
**Assessment of projects focused on the FID and Advanced projects, as well as projects of the previous PCI list as a feedback loop**



**Presentation of results for the more contrasted demand scenarios (Blue Transition and EU Green Revolution)**



**Focus on a limited number of simulations cases (e.g. limited number of contrasted supply configurations)**



**Inclusion of the supply adequacy outlook in Assessment chapter**



### QUESTION 40

TYNDP 2017 introduces a country-level monetisation of supply configurations resulting in country-level supply prices. Do you find it valuable?



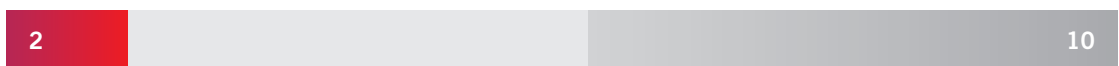
### QUESTION 41

TYNDP 2017 introduces an assessment based on actual import price information. Do you find it valuable?

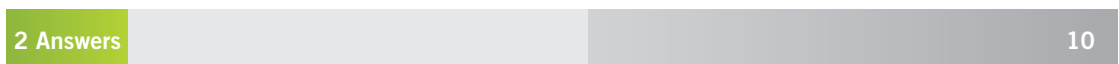
**Yes**



**No**



**Would you have any suggestion of public information that could be used to support this analysis? If the assessment did not prove valuable, could you indicate why?**



## QUESTION 42

Which elements would you suggest to further improve?



## QUESTION 43

ENTSOG publishes all TYNDP assessment results in Annex E – Modelling results. Are these results valuable to you?



## QUESTION 44

ENTSOG provides the description of the modelling tool and modelling methodology as part of Annex F. Is this information valuable to you?



## QUESTION 45

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.)



## QUESTION 46

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.)





### QUESTION 47

Would you like to provide input to the TYNDP 2018 section?



### QUESTION 48

Do you have suggestions on how ENTSOG could improve the stakeholder engagement process?



### QUESTION 49

On which topics do you consider ENTSOG would need specific stakeholder engagement?



### QUESTION 50

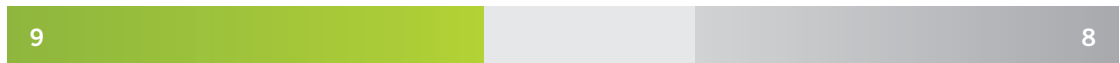
This process has already started, with a public consultation (12 May–12 June 2016), workshops (2 June and 5 July 2016) and a Webinar (10 October 2016). Have you been involved in this process?



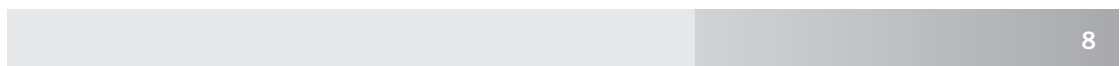
### QUESTION 51

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?

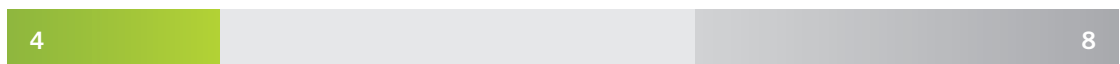
**Yes**



**No**



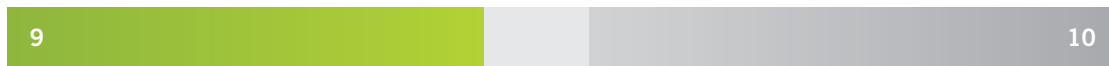
**Further comments:**



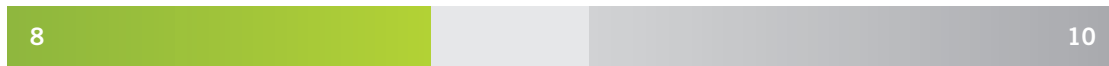
## QUESTION 52

For which supply source do you expect to need the most intense stakeholder involvement?

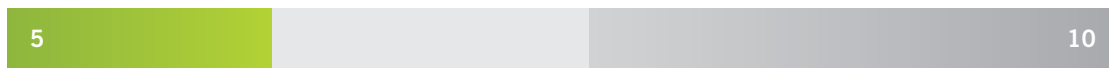
### LNG imports



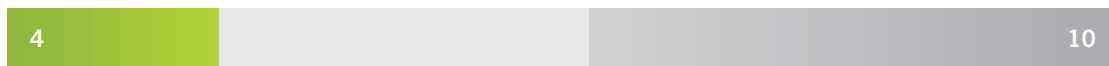
### Pipeline imports from Russia



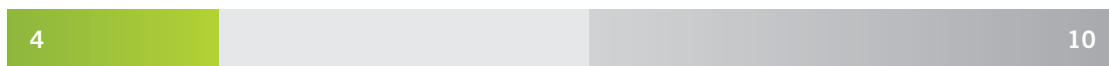
### Pipeline imports from Norway



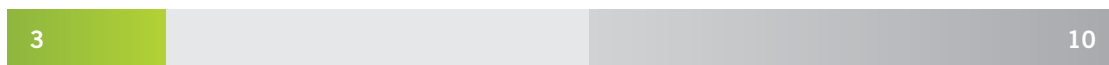
### National production – conventional



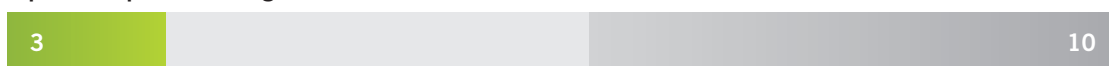
### Pipeline imports from Azerbaijan



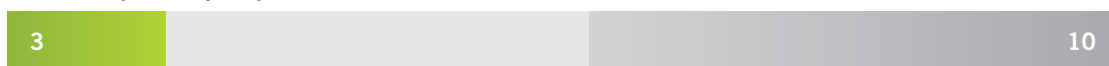
### National production – Biomethane & Power-to-gas



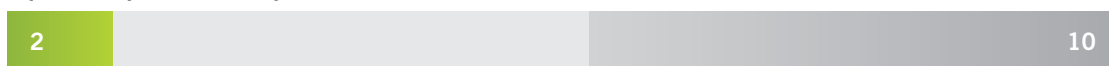
### Pipeline imports from Algeria



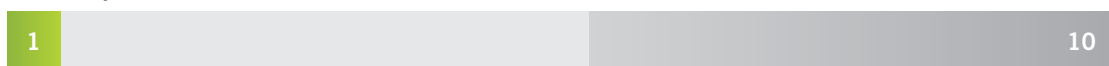
### If Others : please specify below



### Pipeline imports from Libya



### National production – unconventional



## QUESTION 53

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?



Yes	No	Skipped
1	1	1

### QUESTION 54

Do you have any views how to plan for the stakeholder engagement on supply potentials based on the TYNDP 2017 material?

2 Answers

19

### QUESTION 55

Would you see additional elements regarding infrastructures that could be included in TYNDP 2018?

4 Answers

17

### QUESTION 56

Would you see additional elements that could be included in the TYNDP 2018 assessment?

5 Answers

16

### QUESTION 57

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:

**Keeping the same approach as in TYNDP 2017 would provide the necessary insights**

3

10

**Treating LNG as a multi-source supply would bring further added-value to the assessment**

8

10

### QUESTION 58

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?

11

10

Yes	No	Skipped
1	1	1

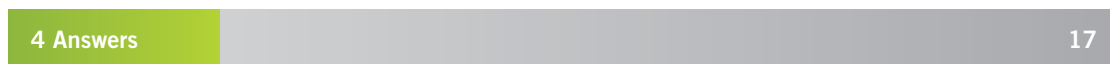
### QUESTION 59

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.)



### QUESTION 60

Do you have other expectations regarding TYNDP 2018?



### QUESTION 61

Do you have any other comment to TYNDP 2017?





# List of Annexes

All Annexes are available as PDF or Excel-file on [www.entsog.eu/publications/tyndp](http://www.entsog.eu/publications/tyndp)

<b>A</b>	<b>Infrastructure Projects</b>
<b>A1</b>	<b>Project Tables</b>
<b>A2</b>	<b>Project Details</b>
<b>A3</b>	<b>Projects reported as not in NDP</b>
<b>B</b>	<b>TYNDP 2017 map</b>
<b>C</b>	<b>Demand and Supply</b>
<b>C1</b>	<b>Country Specifics</b>
<b>C2</b>	<b>Demand</b>
<b>C3</b>	<b>Power Generation Assumptions</b>
<b>C4</b>	<b>Demand Methodology</b>
<b>C5</b>	<b>Supply</b>
<b>C6</b>	<b>Fuel Prices</b>
<b>D</b>	<b>Capacities</b>
<b>E</b>	<b>Modelling Results</b>
<b>E1</b>	<b>Flows</b>
<b>E2</b>	<b>Disrupted Demand</b>
<b>E3</b>	<b>Disrupted Rate</b>
<b>E4</b>	<b>Remaining Flexibility</b>
<b>E5</b>	<b>N-1 for ESW-CBA</b>
<b>E6</b>	<b>Import Route Diversification (IRD)</b>
<b>E7</b>	<b>Modelling Indicators</b>
<b>E8</b>	<b>Monetisation</b>
<b>E9</b>	<b>Monetisation per Country</b>
<b>E10</b>	<b>Import Price Spread</b>
<b>E11</b>	<b>Marginal Price</b>
<b>F</b>	<b>Methodology</b>
<b>G</b>	<b>Gas Quality Outlook</b>
<b>H</b>	<b>Feedback</b>
<b>H1</b>	<b>Public Consultation: Questionnaires</b>
<b>H2</b>	<b>Public Consultation: Data Summary</b>



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