

GTE+ 2nd Workshop
European Gas Network
10 year Development
Brussels, 29/04/2009

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Key issues:

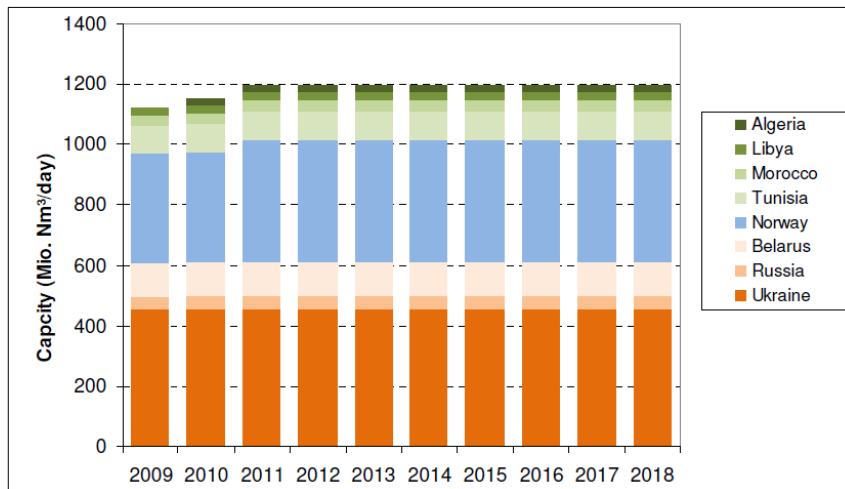
1. Overall approach
2. Planning assumptions – Supply
3. Planning assumptions – Demand

EU GAS NETWORK, 10 YEAR DEVELOPMENT

1. Overall Approach*



- an annual and updatable document (not a 2-year snapshot)
- a consistent set of assumptions across Europe,
- include possible projects as well as those that have final investment decisions already taken.



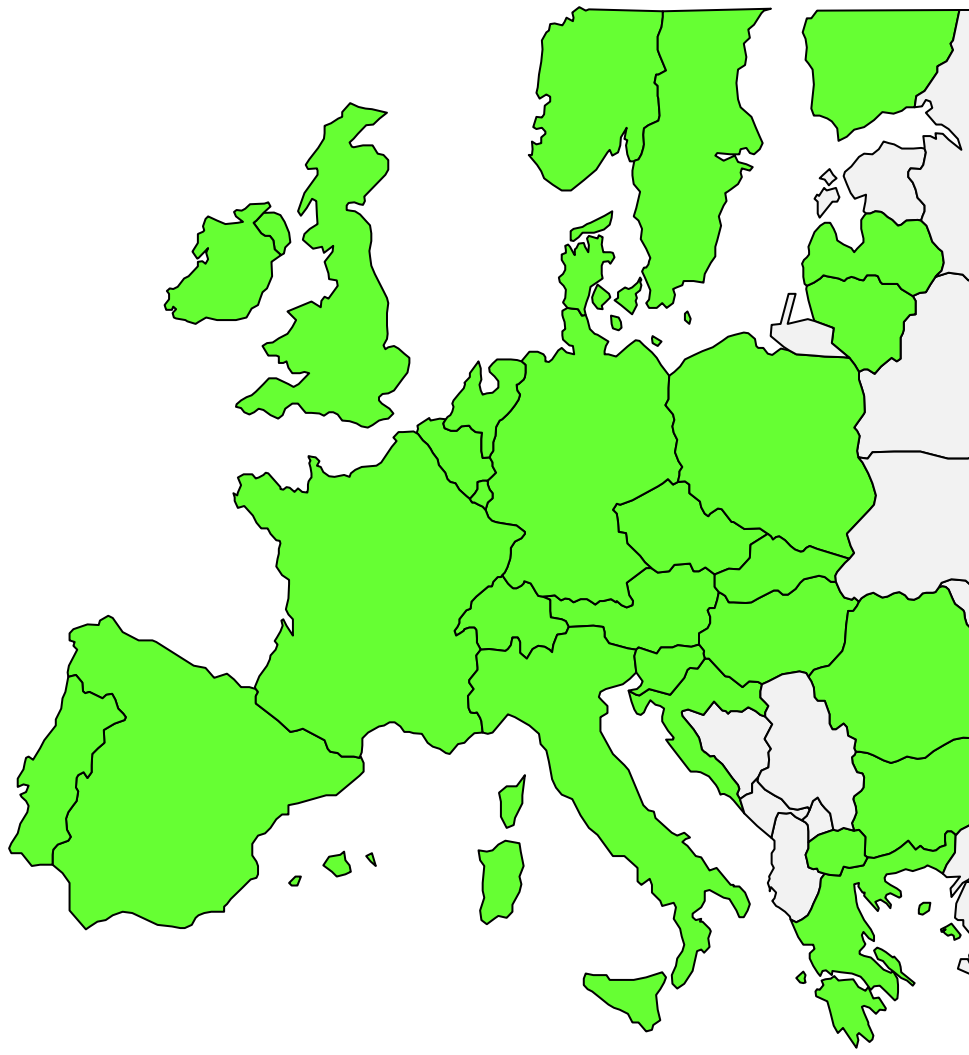
Current graphs in the report only shows 2 new pipelines to europe and no increase in capacity after 2011

* see also EFET presentation at the 1st GTE+ 10 year workshop

www.EFET.org or www.GIE.eu.com

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2. Planning assumptions – Supply



- TSOs build the full entry capacity that is required to enable the maximum gas from identified upstream developments to enter the EU.
- This should be achievable under a range of scenarios agreed with users

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3. Planning assumptions – Demand



- TSOs will need to continue to model the expected load and new connections on their systems: the connected load and how this changes (driven by economic factors, climate etc...) is the main determinant of demand.
- Demand forecasts or assumptions may have an influence on market expectations and we welcome that GTE+ will share these with market participants.
- Information regarding future connection requirements will be needed from DSOs and from prospective power stations or other major users.

“Ready for another 10 years of challenges”



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