TYNDP 2017
Outlook on the development of the gas transportation network in the Balkans

Presentation to GAC – 27 June 2017
Is further infrastructure needed?

TYNDP assesses the gas infrastructure against the Union energy policies

Are they achieved with the existing infrastructure and FID projects?

Yes

No further infrastructure needs

No

TYNDP assesses further infrastructure development

- FID projects + advanced projects
- FID projects + 2\textsuperscript{nd} PCI list projects
The existing infrastructure

- Well-developed EU transmission network
- Diversified pipeline imports

55 projects commissioned since first TYNDP

- LNG terminals
- Underground storages in most EU countries
The EU gas infrastructure is well developed

...and already achieves a lot

1 000 GW
High cross-border capacities

1 100 TWh
High storage capacity and deliverability

Access to diversified supply sources
Support to hub price convergence
Integration of renewable gases and renewable generation
Resilience to extreme temperatures
Resilience to diverse disruption events

Still in specific areas further infrastructure needs remain
Infrastructure needs: where and what for?

To cope with increasing supply needs

Scenarios indicate increasing EU supply needs by 2030

Access to new supply sources – indigenous or extra-EU – would contribute to maintain supply diversification
Infrastructure needs: where and what for?

To ensure EU-wide supply diversification

Several areas have significant access only to 1 or 2 supply sources

FID and advanced projects from 2\textsuperscript{nd} PCI list would ensure access to at least 3 supply sources in Baltics, South-East EU and Iberian peninsula
Infrastructure needs: where and what for?
To ensure security of supply

South-East Europe is still exposed to Ukraine disruption

- 2017
- 2020 - FID projects
- 2030 - 2nd PCI list projects

FID projects significantly mitigate the situation by 2020, 2nd PCI list projects allow further mitigation
Focus on Balkans: projects

See more on TYNDP 2017 Project Map
### Projects in CESEC countries

#### FID projects to be commissioned by 2025

<table>
<thead>
<tr>
<th>Code</th>
<th>Name</th>
<th>Country</th>
<th>Promoter</th>
<th>Status</th>
<th>Commissioning Year</th>
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<tbody>
<tr>
<td>UGS-F-259</td>
<td>Bordolano first phase</td>
<td>Italy</td>
<td>STOGIT</td>
<td>FID</td>
<td>2016</td>
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<td>TRA-F-029</td>
<td>Romania-Bulgaria Interconnection (EEPR-2009-INTg-RO-BG)</td>
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<td>SNTGN Transgaz SA</td>
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<td>TRA-F-1047</td>
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<td>Slovakia</td>
<td>eustream, a.s.</td>
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<td>TRA-F-334</td>
<td>Compressor station 1 at the Croatian gas transmission system</td>
<td>Croatia</td>
<td>Plinacro Ltd</td>
<td>FID</td>
<td>2017</td>
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<td>LNG-F-147</td>
<td>Revythoussa (2nd upgrade)</td>
<td>Greece</td>
<td>DESFA S.A.</td>
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<td>2017</td>
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<td>TRA-F-137</td>
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<td>Ministry of Energy</td>
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<td>TRA-F-214</td>
<td>Support to the North West market and bidirectional cross-border flows</td>
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<td>Snam Rete Gas S.p.A.</td>
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<td>2018</td>
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<td>Trans Adriatic Pipeline</td>
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<td>Trans Adriatic Pipeline AG</td>
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<td>TRA-F-1028</td>
<td>Albania - Kosovo Gas Pipeline</td>
<td>Albania</td>
<td>Min. of Energy and Industry of AL &amp; Min. of Economic Development of KO</td>
<td>FID</td>
<td>2022</td>
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</tbody>
</table>

#### And also

- > 25 projects with an Advanced status
- > Even more projects with a less advanced status
The gas infrastructure is already well developed

- It is close to achieve the EU internal gas market
- It is ready to support a low-carbon future

But the energy situation is not the same all over Europe

- In specific areas, further infrastructure is still needed
- The necessary projects are to be commissioned in the coming years

More on TYNDP:
Thank You for Your Attention

Céline Heidrecheid – System Development Business Area Manager
Stefan Greulich – System Development Adviser
ENTSOG -- European Network of Transmission System Operators for Gas
Avenue de Cortenbergh 100, B-1000 Brussels

EML: Celine.heidrecheid@entsog.eu Stefan.greulich@entsog.eu
WWW: www.entsog.eu