

## GTE+'s First Consultation Process – Conclusions Document

### Next steps towards the European single gas market

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## Executive Summary

This document provides the conclusions of GTE+'s first Annual Work Programme consultation process. This process started with the 21<sup>st</sup> May GTE+ First Consultation Document – Towards the European Single Market, included the 24<sup>th</sup> June Workshop, consideration of stakeholder responses and subsequent discussions with many respondents.

GTE+ has refined the individual Project Plans in the light of feedback received.

The objectives for GTE+ are two-fold; to establish the basis for ENTSOG (the Organisational Development Project) and to demonstrate some progress towards ENTSOG in the pre-Third Package environment (the other Projects).

Stakeholders will shortly start to see clear outputs from the programme; the delivery of the Transparency Platform, Workshops to explore the initial versions of Capacity Co-ordination, Capacity Development and Winter Outlook reports. Interaction with stakeholders in all areas will be used to define next steps and to clarify deliverables.

GTE+ is committed to make progress in this transitional period prior to Third Package implementation and appreciates the participation of stakeholders in this first Annual Work Programme process.

The continued participation of stakeholders will ensure maintain momentum and the evolution of the GTE+ Work Programme to deliver market improvements and to define the basis for ENTSOG.

## GTE+'s First Consultation Process

On the 21st May 2008 GTE+ published its First Consultation Document – Towards the European single gas market<sup>1</sup>.

The objective of the consultation was to open a dialogue with stakeholders to ensure that GTE+'s 2009 Annual Work Programme is realistic, provides an opportunity to establish the basis for ENTSOG and can deliver some tangible progress via specific projects towards the single European gas market. GTE+ committed to take account of the markets opinions and to be responsive refining the intended work programme where appropriate.

The process has involved the publication of the consultation document on 21st May, a Stakeholder Workshop held on the 24<sup>th</sup> June, feedback from stakeholders, subsequent discussions with respondents and the completion of internal GTE governance arrangements to agree this final conclusions document.

### Consultation questions and feedback

The consultation sought the views of respondents as to whether:

- the programme identifies the correct priorities for GTE+ focus during the 2008/2009 period
- there might be alternative areas that market players feel should displace some of these activities
- the objectives and deliverables associated with each project plan are realistic, credible, and achievable
- the programme, if delivered in a timely and responsive manner, would constitute a significant step towards the development of the internal market
- market players have any additional comment or remarks on this programme.

A total of nine responses were received from:

Gaselys  
OGP  
CEN/TC 234 Gas Infrastructure Secretariat  
IFIEC Europe  
Eurogas  
Statoil Hydro  
Centrica  
Edison SpA  
European Federation of Energy Traders (EFET)

Unless respondents request otherwise, and as a general principle for all GTE+ consultations, all responses will be published on the website.

Project Leaders have met, or have talked to, many of the respondents to ensure that feedback is understood. Project Plans have been reviewed and refined in the light of the feedback. GTE+ has completed its internal governance sign-off process confirming members' commitment to the individual projects.

<sup>1</sup>[http://www.gie.eu.com/workshop/download/GTEplus\\_First\\_ConsultationDocument\\_20080519.pdf](http://www.gie.eu.com/workshop/download/GTEplus_First_ConsultationDocument_20080519.pdf)

### Key points arising in stakeholder feedback

The formal responses and subsequent discussions have provided substantial feedback about the ideas included in GTE+'s First Consultation Document. These have influenced GTE+'s thinking leading to the refined Project Plans featured in this document.

Some key points<sup>2</sup> arising from the general questions in GTE+'s First Consultation Document are as follows:

- **Does the programme identify the correct priorities?**

Most of those who responded indicated that GTE+ was focussing on the most appropriate priorities. Respondents emphasised the importance of establishing ENTSOG before moving on to the substantive tasks envisaged for ENTSOG in the Third Package.

- **Are there other priorities that should displace the identified areas?**

Respondents suggested areas that warranted attention although often such respondents regarded these as additional tasks that should be considered rather than as replacements. The most frequently suggested additional priority was balancing.

- **Are project plan objectives and deliverables realistic, credible, and achievable?**

Many specific comments have informed individual project plan refinement.

Responses encompassed a wide range of views; at one extreme one responded suggested that the programme appeared overly ambitious and perhaps unrealistic, at the other extreme one respondent suggested that there was scope to accelerate delivery in respect of most project plans.

- **Would timely and responsive delivery constitute a significant step towards the internal market?**

Most respondents answered in the affirmative. Some suggested greater clarity of some of the milestones and more detailed development plans would increase confidence.

- **Additional comments made by respondents**

Stakeholders regard timely delivery of progress as critical; stakeholders want to see visible progress beyond the writing of reports.

A key theme throughout all responses was that of stakeholder involvement. In the short term stakeholder's want to be more actively involved in individual project evolution, particularly the development of ENTSOG's development and consultation processes. Furthermore, in the longer term, stakeholders seek involvement throughout all stages of ENTSOG development activities, particularly those relating to Ten Year Capacity Development statements and codes.

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<sup>2</sup> These are not intended to be exhaustive but rather to capture stakeholder's most important points. Many detailed points have been reflected in the refined project plans.

### **GTE+ general observations**

GTE+ welcomes the formal responses and subsequent opportunities to talk to respondents.

The objectives for GTE+ are two-fold; to establish the basis for ENTSOG (the Organisational Development Project) and to demonstrate some progress towards ENTSOG in the pre-Third Package environment (the other Projects). These will lay the foundations for ENTSOG but GTE+ is not ENTSOG yet. We are still operating within today's legal and regulatory framework and with voluntary GTE+ member participation.

GTE+ will work closely with stakeholders developing an inclusive approach that will require an investment from both TSOs and stakeholders; this is an opportunity to "prove the ENTSOG concept".

Stakeholders will shortly start to see clear outputs from the programme; delivery of the Transparency Platform, Workshops to explore the initial versions of Capacity Co-ordination, Capacity Development and Winter Outlook reports. Interaction with stakeholders in all areas will be used to define next steps and to clarify deliverables.

That interaction is critical. GTE+ cannot progress without stakeholder involvement; collaborative efforts will be essential to deliver advances and to establish confidence that, in the longer term and in the new environment, ENTSOG will be able to deliver in its Third Package obligations.

Stakeholder desire to include balancing is noted and GTE+ will work with stakeholders to define a balancing initiative to appear in the next AWP consultation process and therefore for work in 2010.

Overall, the GTE+ opinion is that the attached Project Plans offer a credible opportunity to establish the basis for ENTSOG and to deliver tangible progress in the other Projects.

### **Project specific comments**

The responses, and subsequent discussions with respondents, have influenced the revised Project Plans in this document. The following provides high level comments from Project Leaders about each individual project.

- **Organisational development**

GTE+ shares the view of most respondents that the establishment of ENTSOG is critical. The precise role of ENTSOG will not be specified until the Third Package is defined. However GTE+ would like to make progress towards establishing the basis for ENTSOG; the formulation can be amended later if necessary.

Making progress to define the ENTSOG development and consultation processes is essential. The involvement of stakeholders in both the development of those processes and in the operation of the processes once ENTSOG is established will be critical too.

GTE+ intends to work with stakeholders over the coming months to formulate ENTSOG processes that will involve and be responsive to stakeholders. The Madrid Forum is expected to discuss this issue and subsequent discussions will inform a formal consultation early in the new year.

- **Transparency platform**

This Project is well advanced and will go live in two phases; October and January. GTE+ will meet with stakeholders to review the implementation and to consider next steps.

- **Ten Year Capacity Development Statement**

Whilst the precise requirements in this area within the Third Package are not defined GTE+ welcomes most respondents support for this initiative. The first Capacity Development Report will be available shortly. The planned Workshop will afford a first opportunity to assist define the next stages and timings of this project, and particularly stakeholder contributions, that are designed to generate the first Ten Year Network Development Statement report by the end of 2009.

This first statement will be a valuable first contribution to this area regardless of the precise outcome of the Third Package.

- **Winter Outlook**

The Winter Outlook for 2008/9 will be explored with stakeholders at the same Workshop that will consider the first Capacity Development Report during December this year or January next. This Workshop will start a process of regular interaction with stakeholders to deliver an enhanced 2009/10 Winter Outlook meeting the requirements of the market.

- **Capacity Co-ordination**

In the first stage of the project towards compatibility of capacity services broad data on what products are offered and what marketing procedures are in place by European TSOs was gathered. An overview of the current situation in place was established. It was investigated that the methodologies are of high complexity and vary very much between each other.

To facilitate further progress a careful evaluation together with stakeholders in terms of prioritisation, benefit for the market and urgency will be conducted. A consultation document will be published in October 2008 describing the current applied capacity marketing environment including some first considerations of what could be recommended for common TSO application. Stakeholders will provide their opinion in a workshop during November which will form the basis to develop an Analysis and Recommendations Report by end 2008.

In this first step GTE+ will consult on separate conditions for the applied capacity allocation methodologies and describing several marketing procedures. This will be the start of a process to identify how the compatibility of capacity services can be improved to enhance customer friendliness and simplify the conditions to market cross-border capacity.

After an agreement with the market TSOs might face impediments that would hinder implementing the proposed measures. The project will also comprise the identification of these issues and necessary procedures how the situation can be resolved. Impediments can be found for instance in the regulatory, legal, technical or economical environment in which the TSOs have to operate.

- **Procedure on Harmonization of Maintenance Publication**

This Project will focus on looking at improving the provision of information relating to maintenance; it is not intended to establish centralised European maintenance planning or even defining rules to be used in maintenance planning processes.

It was suggested by one respondent that this Project did not have the same importance as some of the other priorities. However, others supported the inclusion of the Project. The GTE+ opinion is that the Project is credible, achievable, does not create obvious resource conflicts with other Projects and affords an opportunity to deliver an improvement in the interoperability area. Therefore GTE+ has decided to leave the refined Project within the 2009 AWP.

- **IT & Communications Roadmap**

The aim of this project is to develop a roadmap to achieve an EU wide coordinated approach in communication and IT matters. The requirement for this project was both recognised and welcomed by respondents, but the need for GTE+ to work closely with other European stakeholders was highlighted by several respondents. Some respondents also highlighted the need to allow sufficient time for both knowledge sharing of different initiatives and to allow the development of an agreed coordinated approach amongst stakeholders.

The project plan has been revised to take account of stakeholders' comments. The process of knowledge sharing is already underway as are discussions as to how to coordinate with initiatives with other bodies in the wider stakeholder community.

## Conclusions

GTE+ appreciates the feedback to this consultation and subsequent discussions with respondents.

Project Plans have been revised taking account of the balance of opinions reflected in responses and resourcing available within GTE+. Stakeholders will start to see delivery in a number of areas shortly and the continued participation of stakeholders will be key to maintain momentum and to evolve the GTE+ Work Programme to deliver market improvements and to define the basis for ENTSOG.

## ***Organisational Development***

### **Objective**

To establish an organisation structure (including statutes and rules) agreed by TSOs, populate the interim structure that can deliver the GTE+ work programme out to the end of 2009 thereby taking some of the necessary steps towards the full ENTSOG role. Develop and share proposed Statutes/Rules of Procedure/intended membership list with regulators/Commission/stakeholders.

### **Deliverables**

Derive the first annual work programmes for GTE+ via stakeholder consultation.  
Develop the proposed development and consultation processes, Statutes and Rules of Procedure for ENTSOG informed by stakeholder views.  
Deliver the second annual work-programme for GTE+ activities via stakeholder consultation, ensuring GTE+ is adequately resourced to deliver 2010 programme.

### **Background**

The Third Package envisages the establishment of ENTSOG. GTE has indicated that it expects to evolve to fulfil the role envisaged for ENTSOG. Three people have been recruited to contribute to what is referred to as GTE+ to differentiate it from GTE as the first step towards ENTSOG.

The GTE+ activities are designed to increase interaction between TSOs and stakeholders, establish the new organisation (this Project Plan) as well as to deliver, or support, other activities included in the other Project Plans described in this document.

GTE+ is not expected to fulfil all the tasks that will be assigned to ENTSOG; however before ENTSOG is established TSOs are committed to demonstrating some progress within the current voluntary framework defined by today's GTE statutes and processes.

### **Assumptions**

The Third Package implementation will feature an ENTSOG with broadly similar role and obligations as those included in the Commission's proposals of January 2008.

The Third Package is expected to be finalised during Q2 2009. This will inform transitional decisions about GTE+ resourcing operation during 2010. It is assumed that a fully functioning ENTSOG, as envisaged in Commission's proposals of January 2008 (or as they may be amended) is unlikely to be operable before late 2010 or early 2011<sup>3</sup>.

### **Plan**

The formal processes to establish ENTSOG are anticipated to take place during 2010. It is expected that greater certainty over the Third Package will emerge during the first half of 2009. Thus the detail of ENTSOG implementation including when ENTSOG might be formally initiated will be known. Depending upon the timescales, decisions about ENTSOG and possible continuation and refinement of GTE+, will be defined during 2009 and will be reflected in the next Annual Work Programme (the 2010 AWP).

<sup>3</sup> given the envisaged leadtimes associated with establishing the Agency prior to triggering the formal processes necessary to establish ENTSOG

The following diagram shows the expected timeline for this project up to the end of 2009:

ENTSOG Organisational Development	2008												2009												
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
GTE+ Initial Recruitment																									
GTE+ Annual Work Programme Consultation Process																									
Prepare and publish consultation document																									
Stakeholder Workshop																									
Finalisation of First Annual Work Programme (to end 2009)																									
Development ENTSOG Statutes and Rules of Procedure																									
Stakeholder engagement about consultation principles & processes																									
Madrid Forum - update on stakeholder interaction and consultation concepts																									
Consultation on consultation principles and processes																									
Publication of GTE recommendation about Consultation/Development processes																									
Identification of Potential ENTSOG membership list																									
Publication of ENTSOG draft Statutes for Regulatory/Commission/stakeholder review																									
2010 Second Annual Work Programme (AWP) Consultation Process																									
Stakeholder engagement to inform initial proposal																									
Prepare and publish consultation document																									
Stakeholder workshop - GTE+ progress to date plus 2010/2011 plan debate																									
Stakeholder engagement																									
Finalisation of 2010/2011 AWP																									
Finalisation of GTE+/Shadow ENTSOG resourcing plan for 2010 AWP																									

(Yellow cells on the charts denote activity periods with red cells denoting key deliverables visible to external stakeholders.)

Two key elements of the Project Plan have now been delivered; the recruitment of 3 GTE+ staff and the completion of the first Annual Work Programme (this document, the 2009 AWP).

The Project Plan features two main elements for 2009:

- the development of ENTSOG's development and consultation processes, Statutes and Rules of Procedure
- the process to develop the next AWP.

Each of these elements is expected to involve extensive external interaction with a wide range of stakeholders.

Participation in these elements will be open to any stakeholder; it is important that all potentially affected parties including shippers, traders, suppliers, consumers and both upstream and downstream players are involved.

#### *Development ENTSOG Statutes and Rules of Procedure*

The Third Package proposals envisage that the TSOs will need to develop draft Statutes and Rules of Procedure for ENTSOG and a list of potential members. It is envisaged these will be submitted to the Agency and Commission. Many of the responses to this consultation process confirm the GTE+ view about the importance of stakeholder participation to define the consultation and development processes.

These processes will be critical to the proper functioning of ENTSOG and will constitute key elements of the Statutes and Rules of Procedures. Therefore prior to defining the Statutes it is

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expected that GTE will further engage with stakeholders about the principles that should define the consultation and development processes and specifically the nature of stakeholder involvement in and influence over the setting of the AWP and other tasks (eg network code development and reports (including Ten Year Capacity Development Statement and Winter Outlook).

It is essential that GTE+ works collaboratively and iteratively with stakeholders on this development and hence we have revised our timetable for this stage of the development to allow more time for dialogue and exchange of views with stakeholders. It is expected that the Madrid Forum on 6<sup>th</sup> November 2008 will be part of this dialogue. These exchanges will inform a formal consultation about the “consultation and development proposals” that GTE+ would launch in February 2009. The proposals could then be amended in the light of subsequent feedback with final conclusions being published, after the completion of GTE internal governance, by June 2009.

GTE will then proceed to develop the draft ENTSOG statutes for wider consideration by the regulators, the Commission and wider stakeholders later in 2009.

Once the Third Package outcome is known and specifically when ENTSOG may formally come into existence decisions can be taken about whether any changes to the GTE governance arrangements in the interim will be necessary.

#### *GTE+'s Second Annual Work Programme Consultation Process*

Stakeholders' involvement is critical to determine an AWP that best meets the aspirations of market players in the interim environment in which GTE+ will operate. Given likely Third Package implementation timescales most of the first year activities in the 2010 AWP are likely to represent GTE+ rather than ENTSOG initiatives.

We therefore envisage substantial dialogue with stakeholders early in 2009 to consider the content of the 2010 AWP. For example, and to be responsive to feedback received as part of this consultation, we would welcome discussions with stakeholders to ascertain what might constitute a balancing initiative for 2010. This would necessitate developing a proposed plan that could be considered in a consultation to identify the most appropriate priorities and plans.

We envisage publishing a consultation document in June 2009. This would be informed by Third Package outcomes and whether GTE+ will be able to contemplate an increase in resources in 2010. Following at least one Workshop and other stakeholder interaction a finalised annual work programme will be produced in September 2009.

To complete the plan, it may be necessary to increase resourcing in 2010 and so GTE+ would expect to finalise its resourcing requirements and obtain commitment from TSOs by the end of 2009. This would be confirmed to the market and so has been included as an external deliverable visible to stakeholders.

### **Transparency Platform**

#### **Objective**

To develop an IT tool allowing market participants to find relevant information regarding transport of gas across Europe on a single site.

Through the GTE Transparency Platform the information will be harmonised and shown in an organised and structured way, simplifying and facilitating gas transmission at European level.

#### **Deliverables**

The project is currently divided into two phases. In the first phase, users will be able to access information on available firm and interruptible capacity, respective tariffs and type of contracts with regards to Interconnection Points between transmission systems in the EU. Users will also have the possibility to search for all capacity routes between any of the identified start and end points.

In addition, users will be able to find key information on the participating Transmission System Operators (TSOs) and, via hyperlinks, access their portals, particularly the sections covering the tariff calculation and tariffs in general, access conditions and relevant contractual documents.

The second phase will make additional data available, in particular information on aggregated nominations and renominations (to be understood as final nominations valid for the gas day), flows and interruptions.

Type of information	Information	Phase
<b>TSO-related information</b>	TSOs' contact information	1
	TSOs' capacity booking model	1
	Link to TSOs' portal	1
	Link to TSOs' tariff information	1
	Link to TSOs' calculator	1
	Link to TSOs' access conditions	1
	Link to TSOs' contractual documents	1
	Link to TSOs' on-line booking system, if available	1
	General information (Name, ID, relevant TSOs/ relevant countries, flow direction)	1
	Firm capacity - technical, contracted, available	1
<b>Relevant point-related information</b>	Interruptible capacity - contracted, available	1
	Contracts available	1
	Applicable tariffs	1
	Conversion factors where used	1
	Past interruptions	2
	Aggregated daily nominations (ex-ante)	2
	Aggregated daily renominations (ex-post)	2
	Actual flows (ex-post) -- provisional until validated	2

Functionalities	Phase
Route searching & display of routes	1
Structured information on all displayed routes	1
Selection of points via the Interactive Map	1

Explanatory fields will be used to better facilitate user understanding of data.

## Background

The liberalization process aimed at the creation of an internal gas market has significantly changed the gas transmission business and increased the need for transparency. In this respect specific obligations for TSOs have been introduced through the European as well as national legislation.

Even though various information is made available by individual TSOs, users may still face difficulties when wanting to transport gas across Europe due to differences in market models applied across the European network. The Transparency Platform has been therefore designed to facilitate access to transmission networks by, among other things, making the various information available in an organised and structured way on a single website.

The first step in this direction was the development of the GTE Interactive Map that provides information on operational procedures applicable at Interconnection Points between different transmission systems in the EU. A real breakthrough in this direction is however the development of the Transparency Platform that should provide information related to capacity offered by TSOs.

GTE announced its intention to develop the Transparency Platform at the Madrid Forum XII in February 2007. As a follow-up, GTE organised consultation process, including a workshop with stakeholders in May 2007, on the basis of which GTE fine-tuned the contents of the Transparency Platform in terms of information to be displayed and functionalities to be available. The contents as finalised were presented at the Madrid Forum XIII in October 2007.

Due to the complexity of the project with regards to the technical solution, GTE decided to contract an IT provider on the basis of a tender procedure. The IT provider, ECG Erdgas Consult, was selected on 30 April 2008.

The combined efforts of the GTE project team and ECG Erdgas Consult are aimed at promoting and supporting active TSO participation in this initiative. The current development activity is on schedule and an extensive group of TSOs should be delivering data into the Platform at start-up.

## Assumptions

The project is mostly based on information that is already published by individual TSOs on their websites.

Provision of information that may currently not be subject to obligatory publishing<sup>4</sup> (aggregated nominations, renominations) will be made available by TSOs on voluntary basis as their contribution to the creation of a single European gas market.

TSOs will apply the confidentiality rules they are subject to under their national legislation.

Units used by individual TSOs will be converted to one common unit using conversion factors supplied by the TSOs<sup>5</sup>. Those conversion factors will be available for users to consult.

The Transparency Platform will serve as information platform only.

<sup>4</sup> Publishing of some information may not be obligatory at the European level but may be so at the national level.

<sup>5</sup> As an exception to the rule, units used for capacity products prices will not be converted and will be shown as published by the TSO (regulator).

## Plan

The following diagram shows the expected timeline of the project development:

Transparency Platform	2008												2009											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
1st Phase																								
2nd Phase																								
Stakeholder workshop																								
Functionality check; possible adjustments in relation to information provided																								
Inclusion of additional TSOs (where necessary)																								

### *1<sup>st</sup> phase*

The 1<sup>st</sup> phase covers the development of the Functional specifications by GTE as well as the tender process and the core technical development of the Transparency Platform by the selected IT provider, in particular the programming of the algorithm for the route searching and, also, the establishment of the interfaces with the individual TSOs.

### *2<sup>nd</sup> phase*

2<sup>nd</sup> phase will focus on the extension of the data set to be made available at the Transparency Platform. It will nevertheless cover 'fine-tuning' of the platform and interfaces with the TSOs as well.

### *Stakeholder workshop*

An opportunity for stakeholder review of the Transparency Platform during March is envisaged as the start of a regular process of stakeholder interaction to inform maintenance and upgrading of the platform.

## **European Winter Outlooks 2008/2009 and 2009/2010**

### **Objective**

To develop European Winter Outlooks for the winters 2008/2009 and 2009/2010 showing on the European level transportation capacities and consumption forecasts in peak conditions and identifying possible EU internal bottlenecks to fulfil demand under these conditions.

### **Deliverables**

The European Winter Outlooks 2008/2009 and 2009/2010 are to provide European stakeholders and market participants with information on:

- daily consumption forecast in peak winter conditions for the next winter under normal and exceptionally cold conditions;
- transmission capacities of infrastructures at main European import points, LNG terminals and aggregated entries from national production;
- aggregated entry capacities from storages.

### **Background**

GTE has long since recognised the need for the development of winter outlooks on the European level to support the development of the EU Internal Gas Market and to complement national winter outlooks being published in several EU Member States. After discussing this idea on Madrid XI, it was agreed that GTE would develop the first European Winter Outlook for the winter 2007/2008.

GTE collected the relevant data from its members in 2007 and presented the results for the winter 2007/2008 in the meeting of the Gas Coordination Group on 25 October 2007. In this meeting, the Winter Outlook 2007/2008 compiled by GTE was highly welcomed by European stakeholders. After discussion of the results it was agreed that GTE would conduct additional analyses of the data. The results of these analyses were presented by GTE on the meeting of the Gas Coordination Group on 8 January 2008.

Recognising the usefulness of this work for the European Gas Market and considering that the Draft Third Energy Package of the Commission foresees the development of annual Winter Outlooks by ENTSOG, GTE+ plans to develop Winter Outlooks for the winters 2008/2009 and 2009/2010.

Stakeholders responding to the consultation on the GTE+ work programme asked for a dedicated event for stakeholders, inclusion of forecasted demand data at regional/national level, wide circulation, clarification that the Winter Outlooks are not meant to anticipate any specific supply situation, clarification that confidentiality will be regarded, earlier publication and inclusion of feedback in the final version. In reaction to these requests, this project plan was amended as follows:

- Periodical stakeholder workshops will be conducted covering both the European Ten Year Network Development Statement and the Winter Outlook 2009/2010.
- The stakeholder workshops will be used to agree on scope and timing of the Winter Outlook 2009/2010.
- A statement that the draft and final Winter Outlooks will be published on the GIE website is added.

- It will be clarified that the Winter Outlooks are not meant to anticipate any specific supply situation.
- It will be clarified that confidentiality will be regarded in the Winter Outlooks.
- TSOs will be asked whether national processes allow for an earlier publication of the preliminary version of the Winter Outlook.
- Stakeholder feedback is foreseen to be included in the final version of the Winter Outlook 2009/2010 and if practically possible also in the final version of the Winter Outlook 2008/2009.
- It will be explicitly stated that the report will detail assumptions on both a national and European level.

### Assumptions

The GTE+ Winter Outlooks 2008/2009 and 2009/2010 will be based on the respective national information provided by GTE+ members (daily consumption forecast in peak winter conditions for the next winter under normal and exceptionally cold conditions; transmission capacities of infrastructures at main European import points, LNG terminals and aggregated entries from national production; aggregated entry capacities from storages). Confidentiality will be regarded in the production of the Winter Outlooks.

It is expected that a fair representation of the European situation can be developed although it must be taken into account that the data collected this way cannot necessarily be seen as complete.

It is foreseen to develop and apply specific assumptions to take into account the depletion of production fields and the decrease of the withdrawal performance of gas storages during the winter.

All assumptions underpinning both national and European information will be detailed in the report in order to allow a comprehensive understanding of results. The Winter Outlooks will be accompanied by a clarification that they are not meant to anticipate any specific supply situation.

### Plan

The experience gained and the information received from European stakeholders during and after the development of the Winter Outlook 2007/2008 will be used to produce the Winter Outlook 2008/2009. It is expected that also that process will help improving process and content of the subsequent Winter Outlook 2009/2010. For both Winter Outlooks, three phases are foreseen. These three project phases will be complemented by a stakeholder dialogue as described below. The planned timing is shown in the following diagram accompanied by an outline of the activities foreseen in these phases. As a result of the stakeholder dialogue amendments to scope, timing and responsibilities for information provision may be agreed upon.

	2008						2009					
	J	F	M	A	M	J	J	A	S	O	N	D
Winter Outlook 2008/2009								Y	Y	R		
Data Collection and Analysis								Y	Y			
Presentation and Discussion								R				
Final Version												
Winter Outlook 2009/2010								Y	Y	Y	Y	R
Stakeholder Dialogue								Y	Y	Y	Y	
Data Collection and Analysis								Y	Y	Y	Y	
Presentation and Discussion									Y	Y		
Final Version										R		

### *Stakeholder Dialogue*

Starting in December 2008 / January 2009, periodical stakeholder workshops will be conducted covering both the European Ten Year Network Development Statement and the Winter Outlook 2009/2010. These stakeholder workshops will be used to further develop the scope and timing of the Winter Outlook 2009/2010. The appropriate interval and foreseen dates for these workshops will be agreed upon in the first workshop.

### *Phase 1: Data Collection and Analysis*

The development of each Winter Outlook starts with the collection of the data defined above via the GTE+ Members. Data templates will be defined and distributed. The answers will be collected and evaluated. A draft Winter Outlook will be produced. This phase is expected to start in July 2008 and 2009 respectively and to finalize in August of the same year. For the production of the Winter Outlook 2009/2010, TSOs will be asked whether national processes allow for an earlier publication of the preliminary version of the Winter Outlook.

### *Phase 2: Presentation and Discussion*

The draft Winter Outlook will be made public on the GIE website and presented to European Stakeholders. For the Winter Outlook 2008/2009, the meeting of the Gas Coordination Group on 18.09.2008 was used for such purposes. For the Winter Outlook 2009/2010, a meeting of the Gas Coordination Group and/or a Madrid Forum and/or a GTE+ stakeholder workshop may be used for such purposes. The feedback received through these events will be used to refine the work. This phase is expected to be conducted in September and early October 2008 and 2009 respectively.

### *Phase 3: Final Version*

The final Winter Outlook giving on the European level an overview of transportation capacities and consumption forecasts in peak conditions and identifying possible EU internal bottlenecks to fulfil demand under these conditions is foreseen to be produced during October 2008 and 2009 respectively and to be published on the GIE website. Stakeholder feedback is foreseen to be included in the final version of the Winter Outlook 2009/2010 and if practically possible also in the final version of the Winter Outlook 2008/2009.

## ***European Ten Year Network Development Statement 2009***

### **Objective**

Development of a European Ten Year Network Development Statement by the end of 2009 describing the foreseen developments of the European gas transmission capacities and analysing the ability of the European gas transmission network to meet the requirements of the European Gas Market.

### **Deliverables**

Three project phases are foreseen to structure the development of the report and the interaction with stakeholders:

- A Capacity Development Report until November 2008
- A Demand Scenarios vs. Capacity Report until July 2009
- A European Ten Year Network Development Statement until December 2009

From December 2008 to March 2009 an external stakeholder survey will be conducted to seek input from market participants to the development of the required scenarios on gas supply and gas demand.

### **Background**

The European TSOs have long since recognised the importance of developing a long term network development statement, and have in fact already been working on the background to the development of such a report within GTE. GTE+ acknowledges that this priority has been further emphasised through the inclusion of provisions for such a report in the European Commission's 3rd legislative package proposals. Prior to the formal adoption of new legislation GTE+ has committed to working on the development of this statement.

The intention of the statement is to allow the development of a European picture, and identify where additional capacity might better facilitate the development of the European Gas Market. The overall objective is to support the development of the European Gas Market.

The GTE+ Ten Year Network Development Statement will describe the foreseen developments of the European gas transmission capacities and analyse the ability of the European gas transmission network to meet the requirements of the European Gas Market.

It is not intended that the report will form the basis of an investment plan for TSOs, but it may inform the debate on where new transportation capacity may be required to prevent bottlenecks in order that the necessary market planning mechanisms can follow. It is likely that the report will have the potential to be used as a means to allow potential required developments to be signalled to all parties at an early stage, and through this allow parties to have the ability to understand, identify and evaluate opportunities.

A stakeholder responding to the stakeholder consultation that was carried out on the GTE+ work programme (see below) requested to explain the legal context for this work more clearly. GTE+ would therefore emphasize that both reports and the European Ten Year Network Development Statement are foreseen to be produced in the context of the existing EU legislative framework and are non-binding on the TSOs.

Individual investment decisions are a matter for the respective TSOs. TSOs will continue to base their investment decisions according to their decision-making processes.

It is important to highlight that the development of the European long term network development statement is a significant challenge and will require progress through a number of stages of development in order to work towards the elements included in the Commission's proposals. With this in mind GTE+ has developed a plan for the development of this work over the coming years, highlighting the various stages and deliverables to progress this work. It should be stressed that TSOs cannot deliver on this alone, and input from other market participants will be required throughout the process.

The GTE+ Ten Year Network Development Statement 2009 will identify the ability of the system to meet Supply/Demand Scenarios developed in co-operation with stakeholders through reporting on capacity evolution and potential mismatches/bottlenecks based on the Supply/Demand Scenario. However, we envisage that in subsequent reports, and especially those that will be developed once the formal basis will have been provided via the European Third Energy Package, more detailed work will be possible and developed by ENTSOG.

Stakeholders responding to the consultation on the GTE+ work programme asked for clearer specification of the stakeholder interaction, conducting regular stakeholder meetings, speeding up of report production, clarification of the legal context, inclusion of information on capacities of pipeline infrastructure exempted from regulation and publication of the assumptions of each TSO or national forecasts. In reaction to these requests, this project plan was amended as follows:

- Periodical stakeholder workshops will be conducted covering both the European Ten Year Network Development Statement and the Winter Outlook 2009/2010.
- The stakeholder workshops will be used to find out whether project phases can be shortened in order to allow earlier production of the final statement.
- A description of the national processes for investments and of the current publications on the national level will be included in the Capacity Development Report.
- The legal context of this project will be explained more clearly.
- A statement on the inclusion of information on capacities of pipeline infrastructure exempted from regulation will be added.
- It will be explicitly stated that the report will detail assumptions on both a national and European level.

### Assumptions

The GTE+ Ten Year Network Development Statement will build on national development statements and on the Guidelines for Trans-European Energy Networks (TEN-E) in accordance with Decision No 1364/2006/EC of the European Parliament and of the Council. Information on capacities of pipeline infrastructure exempted from regulation in line with Article 22 of Directive 2003/55/EC will be included if this information is given to GTE+ by the respective project sponsor.

Based on Supply/Demand Scenarios and capacity evolutions at all interconnection points the European Ten Year Network Development Statement will identify capacity gaps/mismatches not only for cross-border capacity, but also for European relevant within-country interconnection points between TSOs.

The European Ten Year Network Development Statement will include the development of Supply/Demand Scenarios. A stakeholder survey will be conducted to receive stakeholder input to these demand/supply scenarios. The scenarios will be used to build a picture of the relationship between the Scenarios of Supply/Demand and capacity evolutions across Europe.

Stakeholder workshops will be conducted at every major step to receive stakeholder views and to take them into account in the reports and the following processes.

In particular GTE envisages significant dialogue with stakeholders to feed into development of the detailed content of the Ten Year Network Development Statement. This will likely, in part, be facilitated through workshops to engage with stakeholders and identify requirements to ensure stakeholder needs are fully reflected.

All assumptions underpinning both national and European information will be detailed in the report in order to allow a comprehensive understanding of results.

## Plan

Given the challenges associated with producing a European Ten Year Network Development Statement, three project phases are foreseen to structure the development of the statement and the interaction with stakeholders. The first phase, currently underway, will result in the publication of a Capacity Development Report, the second in a report on Demand Scenarios vs. Capacity and the final European Ten Year Network Development Statement in a comparison of Supply/Demand Scenarios vs. capacity. As a result of the stakeholder dialogue amendments to scope, timing and responsibilities for information provision may be agreed upon. An overview of the planned process is given in the following flowchart:

	2008												2009											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Capacity Development Report																								
Demand Scenarios / Capacity R.																								
Stakeholder Dialogue																								
Network Development Statement																								

### Phase 1, Jan 2008 – Nov 2008: "Capacity Development Report"

In Phase 1, the capacity development at the interconnection points of the European gas transmission systems is to be analysed and published in a Capacity Development Report. European TSOs will be the providers for information for this report. This report will show the capacity development at all relevant European interconnection points for the ten year period from 2008 to 2017. Main target of the report is to identify potential capacity gaps with respect to interconnection point capacities. This phase will be complemented by a survey of European TSOs on the national processes for investments and the current publications on the national level to develop an understanding of what current information on long-term capacity evolution, supply and demand scenarios is already available. The report is to be published in November 2008.

### Stakeholder Dialogue

Starting in December 2008 / January 2009, periodical stakeholder workshops will be conducted covering both the European Ten Year Network Development Statement and the Winter Outlook 2009/2010. These stakeholder workshops will be used to further develop the scope and timing of the European Ten Year Network Development Statement. The appropriate interval and foreseen dates for these workshops will be agreed upon in the first workshop.

*Phase 2, Sep 2008 – Jul 2009: “Demand Scenarios vs. Capacity Report”*

In Phase 2, Demand Scenarios will be developed, based on input received from European TSOs and/or other available sources, and the ability of networks to meet the requirements will be assessed. Engagement with stakeholders will be undertaken at an early stage as part of the stakeholder dialogue to shape the report. A stakeholder survey as part of the stakeholder dialogue will be conducted on the European level to receive stakeholder input to these Demand Scenarios and also to the Supply Scenarios in Phase 3. The Demand Scenarios vs. Capacity Report is due for publication in July 2009.

*Phase 3, Feb 2009 – Dec 2009: “European Ten Year Network Development Statement”*

In Phase 3, Supply Scenarios will be developed together with stakeholders and will be used to conduct an analysis of Supply and Demand Scenarios against capacity evolution. This analysis will allow the development of a picture of the ability of the European networks to meet the demanded requirements. Engagement with stakeholders will be undertaken at an early stage as part of the stakeholder dialogue to shape the report. The stakeholder survey described for phase 2 above will also include a request for input on the development of gas Supply Scenarios to Europe. The information received in this stakeholder survey will be used in the final European Ten Year Network Development Statement that is foreseen to be published in December 2009.

The document will include an overview of current and foreseen processes (e.g. open seasons) to have a view of the capacity needs and the related capacity forecast.

### **Capacity Product Coordination**

#### **Approach**

GTE+ launched a project dealing with "Capacity Product Coordination" which has the aim to improve compatibility of cross-border shipping services as well as their related characteristics and procedures. The main purpose of the project is therefore to enhance customer friendliness and deliver market benefits by simplifying the network access to the EU Grid. This purpose shall be supported by the publication of an initial Analysis and Recommendation Report, that will be further extended, and later on by an Impact Assessment Report. All reports will be supported by an extensive investigation of all deliveries and a stakeholders' evaluation phase.

Comprehensive information has already been obtained from participating TSOs by means of a questionnaire. The answers have been consolidated, analysed and evaluated, for providing an overview and a first set of suggestions for stakeholders' evaluation on which common service features could be offered by European TSOs as a starting point. This capacity service overview and the proposals for recommendations will be consulted with stakeholders regarding prioritisation, user benefit and urgency.

The proposals which will be compiled in a report by end 2008 shall provide a common understanding on relevant services, their related characteristics and procedures as those recommendations in the compendium can be used by all European TSOs for offering and rendering their cross-border services.

At this stage the members of GTE+ work voluntarily and the CPC work seeks to increase compatibility with the given regimes and available opportunities at this time. Before the start of ENTSOG system changes need to be considered with regards to voluntary GTE+ member contribution and the legal and regulatory environments in place.

Not only the continuous and repeating involvement of the market parties but also the detailed analysis procedures will assure that the impact assessment (summed in a published Impact Assessment Report) of the recommendations will provide a solid basis for an added value to the energy market through a contribution of a stepwise enhancement of the service quality offered to shippers throughout the EU. A practicable example would be that TSOs offer services (beside what they already apply) that are compatible over adjacent networks.

#### **Objective**

The main objectives for phase 1 in 2008 are:

- Creation of an overview concerning the shipping services and the related characteristics as well as processes which are currently offered throughout the EU to be shared with stakeholders;
- Identification by the TSOs of potential for coordination of the offered services, i.e. quick wins as well as measures which require a certain implementation period to be shared with stakeholders;
- Obtaining sophisticated requirements and opinions of all European stakeholders as well as embracing their feedback priorities and understanding of the respective benefits;

- Identification of impediments hindering implementation (e.g. legal, economical or regulatory) and required measures for removing them, in order to facilitate coordination and to propose services with merit for the market;
- Publication of an Analysis and Recommendations Report for cross-border service coordination including proposals for recommendations for quick wins as well as measures which require a certain implementation period based on the data collected on the one hand and on the additional input from stakeholders' feedback, on the other hand.

Depending on the feedback received from the stakeholder workshop the following further objectives for a possible phase 2 and 3 of said project are planned:

- Where achievable start of implementation according to the proposed recommendations with the foreseen timeline;
- Analysing what impediments exist and have to be removed to facilitate the implementation of the recommendations. This would embrace the description of the required step-by-step process (including cost-benefit analysis) that has to be sought (e.g. what would have to be enabled or approved by NRAs, which law would need to be changed etc.);
- Identification of measures for an **extended** coordination where required to meet the needs of the system users (with stakeholder involvement);
- Creation of an **extended** overview concerning products and the related characteristics as well as processes which are currently offered throughout the EU;
- Consulting the market on further measures and discuss options and find solutions for next steps.;
- Identification of **extended** potential for coordination of the offered services;
- Development of an **Extended** Analysis and Recommendation Report for cross-border service coordination including recommendations for implementation based on the data collected as well as on the additional input obtained from stakeholder feedback;
- Creation of an Impact Assessment Report, identifying the impact of the proposed recommendations and assessing possible future measures laying the foundation for ENTSOG under a third package world.

## Deliverables

The main deliverables of the project are the following:

- I. Analysis and Recommendations Report for cross-border service coordination
- II. Extended Analysis and Recommendations Report for cross-border service coordination
- III. Impact Assessment Report laying the foundation for ENTSOG under a third package world

Each deliverable will be produced during a separate phase of the project. Detailed contents of the phases are described below, with phase 1 being finalised by end 2008. The planning of

Phase 2 and 3, however significantly depends on the feedback received from the stakeholder during the workshop organized in Phase 1, hence making the delivery of the 2 additional reports subject to revision.

## Plan

In order to get an overarching overview of the services, their related characteristics and procedures currently offered and applied by the European Transmission System Operators, a questionnaire was used structured in 3 main chapters:

### “What you<sup>6</sup> sell”

The main purpose of this chapter is to analyse “what” services are currently offered by the European TSOs. This is carried out in particular by asking for concerned services (e.g. daily, monthly, yearly etc) and their related quality with regards to firm as well as interruptible products.

### “How you sell”

The main purpose of this chapter is to analyse “how” the offered services are marketed. This is carried out in particular by asking for concerned booking procedures (e.g. “first come first served, open subscription window, auction etc) and concerned related “lead and reaction times” currently applied to market the services.

### “How you deliver”

This chapter is analysing “how” the offered services are rendered. This is carried out by asking for concerned the operational procedures (e.g. nomination and re-nomination deadlines, means of communication etc) and concerned related information (e.g. nomination units) necessary to carry out these services.

To ensure the maximum possible degree of quality fundamental analysis, consultations, evaluations and extensive endeavours are a prerequisite. The further progress will be most reliant on the feedback received from the market and its stakeholders. All necessary efforts and the scope to define a detailed plan for phase 2 in 2009 will finally be assessed after having evaluated the reaction of the market parties during the consultation and stakeholder workshop. Prior to defining a conclusive project plan market feedback to GTE+ about prioritisation and necessary measures is needed to realise an appropriate implementation.

The following table provides an overview for phase one. Phases 2 and 3 will be detailed including the feedback obtained during the workshop in fall 2008.

Capacity Product Coordination	2008												2009											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Phase 1																								
Collate data and analysis																								
Development of consultation document																								
Stakeholder Consultation																								
Stakeholder Workshop																								
Analysis and Recommendation Report																								
Phase 2																								
To be defined considering workshop results																								
Phase 3																								

<sup>6</sup> European Transmission System Operators

**Phase 1, March 2007 – December 2008: “Analysis and Recommendation Report”**

At the beginning of this project a questionnaire was developed that covered a broad range of capacity services and related characteristics (see description above).

In the following step a data base has been established covering all the collected information to enable a proper evaluation. With that basis the task force started an analysis, which ended in June 2008, evolving into the identification of potential for coordination that is put into a consultation document. The consultation paper will describe in detail which kind of coordination measure could be proposed for gaining possible quick wins as well as objectives which require certain measures to implement them under the current framework. Furthermore, all sorts of impediments hindering the envisaged coordination will be identified and pointed out. In November 2008 a stakeholder consultation will be conducted in order to get valuable feedback at an early stage from the market on the pre-findings of the evaluation. The consultation will include a stakeholder work shop. The discussion results will form a further source basis for recommendations. All findings will be summed-up in an Analysis and Recommendation Report for cross-border service coordination which will be produced and finally published in December 2008.

As explained above a more precise time table for the following two steps will be defined according to the feedback received from the market and after sufficient experience with phase one was made.

**Phase 2: “Extended Analysis and Recommendation Report”**

An initial objective of phase 2 is developing detailed processes to outline all relevant measures to remove the identified impediments which are currently hindering the implementation of the proposed recommendations, based on the feedback of the stakeholders. This will comprise a stepwise approach plan about who needs to be addressed and what needs to be done. Building upon the first implementation report and other relevant identifications, the second phase will broaden the subject of shipping services analysis. For this purpose the task force will establish a continuative questionnaire consisting of new and “follow-up” questions derived out of experiences gained during the first evaluation phase. To assure an extensive analysis, a database will be developed prior to the initial analysis and identification process of further coordination recommendations. Additional potentials for coordination and barriers that need to be removed will be identified. In a second wave of stakeholders’ consultation, further relevant information will be collected and discussed with the market. The end of this phase will be marked by the finalisation of the Extended Analysis and Recommendation Report with implementation proposals for cross-border service coordination, melting the findings from the analysis and the workshop.

**Phase 3: “Impact Assessment Report”**

Based upon stakeholder inputs the third phase of the project will assess the “market value” of the recommendations. Necessary further measures will be identified, taking into account the stakeholders’ involvement and the lessons learned from the process conducted. The development of a survey on impact assessment will be the starting point of this third phase. Collected information will be subject to a comprehensive analysis. The results and findings of phase 3 will be published in a Report on Impact Assessment.

## ***Procedure on Harmonisation of Maintenance Publication***

### **Objective**

To establish a procedure in order to streamline the communication about planned maintenance amongst TSOs and between TSOs and other European Stakeholders. Thanks to this procedure, the publication of information regarding the planned maintenance will be harmonised, simplifying and facilitating gas transmission at European level.

### **Deliverables**

The work program to write the procedure shall be undertaken in different phases. To start with, an overview of the current practices shall be drawn up by issuing a questionnaire to the GTE members. The data shall be collected and analysed by the members of the GTE Business Rules sub-Working Group. Then, a first draft of the procedure shall be made with a view to submitting it to the Stakeholders for review at the occasion of a workshop. Finally, the procedure shall be finalized taking into account the feed-back received during the workshop.

The key deliverable is that market participants will be provided with a standardized planning of works and interventions that might have an impact on the physical flows at Interconnection Points (IPs) or between IPs in the various transmission systems in the EU (Installation or IP concerned, description, timing, impact, file format).

### **Background**

It has been recognized that, even though information is already made available by individual TSOs, market participants may still face difficulties to transport gas across Europe due to differences in the handling of maintenance publication (e.g. timing, means of communication).

GTE+ is fully committed to improving the maintenance publication and is of the view that TSOs, in their role of market facilitators, are best placed to facilitate the communication around maintenance to their networks by, among other things, making the various information available in an organised and structured way.

For sake of clarity, it should be noted that the aim of the project is not to harmonize maintenance as such.

### **Assumptions**

The project is mostly based on information that is either already published by individual TSOs on their websites (or alternatively Bulletin Board) or issued to the Market participants by any other means.

For most TSOs, maintenance is a matter that is covered within their respective network codes; GTE+ assumes that National Regulatory Authorities will endorse the resulting procedure and require its implementation on a national level in order to avoid disparities in the different transmission systems across Europe.

### **Plan**

The following diagram shows the expected timeline of the project development:

Procedure on Harmonisation of Maintenance Publication	2008												2009											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Identification of Current Practices & First Draft of the Procedure																								
Workshop/Consultation Process with Stakeholders																								
Development of the Final Version of the Procedure																								

### **1<sup>st</sup> phase**

The 1<sup>st</sup> phase covers the gathering of information on the current practices with regards to maintenance publication by GTE Business Rules sub-Working Group. To do this, a questionnaire will be drawn up and sent to the GTE members. Data shall be collected and analysed in order to draft a first version of the Procedure on Harmonisation of the Maintenance Publication.

### **2<sup>nd</sup> phase**

2<sup>nd</sup> phase will focus on the feed-back from the Stakeholders, which will be collected either through a workshop or via a consultation process. Stakeholders shall then be given the opportunity to give their comments on the draft and to make propositions of adaptation.

### **3rd phase**

The 3rd phase will consist in developing and validating a final version of the procedure on harmonisation of the maintenance publication, taking the feed-back from the Stakeholders into account.

## ***IT and Communications Roadmap***

### **Objective**

To develop in cooperation with other European stakeholders an IT and Communications roadmap providing an EU wide IT development and guidance plan covering data exchange principles and criteria, IT communication standards, protocols, security and implementation.

### **Deliverables**

The key deliverable is the production of an IT and Communications Roadmap as outlined in the objective and further outlined in this document.

The work programme to develop the Roadmap shall be undertaken in a number of phases. There is first a need to get an overview of differences and commonalities concerning data exchange principles and IT solutions currently adopted by TSOs and other market players. There is also a need to identify initiatives being planned by other bodies and to liaise with these groups. Agreement then has to be reached as to how best to coordinate activities and who should lead each area. Only after these issues have been addressed can this strategy document concerning data exchange and a future IT development and implementation strategy of agreed standards and protocols be developed.

### **Background**

It has been recognised for some time that there is a lack of coordination both amongst operators and network users with respect to IT and communication related matters. This was the key driver for GTE establishing a group in 2007 to address this issue, the GTE ITC-sub Working Group.

This group has a remit to support IT and communication initiatives at the European level and to lend support to other European Associations where appropriate. From the outset a key aim was to develop a strategy document (an ITC Roadmap).

There is a growing need for coordination and harmonization at the European level in IT and communication matters and GTE+ is fully committed to addressing this issue, especially in the light of initiatives (work programmes) being planned by other bodies, such as EASEE-gas. An additional driver is that the cost burden of information provision and IT initiatives lies mainly with TSOs. There is also a general lack of guidance on adoption principles and implementation processes on existing standards and protocols for the safe and secure exchange of data. The aim of the Roadmap would be to address these issues and to facilitate the development of new communication standards and protocols as well the adoption of existing ones where agreed as appropriate.

It is important that any ITC Roadmap is seen to coordinate with initiatives undertaken by other bodies in the wider stakeholder community. It is recognised that communication standards and protocols should be developed jointly by all stakeholders but GTE+ could have a key role in the development of adoption principles and guidelines for both new and existing standards and protocols for data exchange. The Roadmap will also need to recognise that following agreement at the EU level there may be separate national processes required for adoption by operators and market users.

## Assumptions

The Roadmap shall focus on data exchange principles and criteria and on the issues surrounding the interfaces between systems. This includes both the interfaces between operators and those between an operator and its users. It will not be concerned with the internal IT practices and systems of stakeholders.

Adoption principles and implementation processes described in the Roadmap shall apply to communication standards and protocols that have been developed jointly by all stakeholders.

## Plan

The following table shows the timeline for developing the roadmap. (*Please note that completion of this project is not expected until 2010*).

Roadmap for ITC Development	2008												2009										
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	D
Identify initiatives taken by other stakeholders	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y											
Analysis of current data exchange principles and IT solutions	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		Y	Y	Y	Y						
Develop coordinated approach with other bodies	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		Y	Y	Y	Y						
Identification of current issues with ITC-systems													Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Start developing EU ITC Development & Guidance plan																			Y	Y	Y	Y	Y

### 1<sup>st</sup> phase

This initial phase is focussed on information gathering, analysis and coordination. It involves surveying current data exchange principles and criteria as well as the solutions utilised by operators and users to ascertain commonalities and differences. Other relevant European initiatives shall be identified and a coordinated approach agreed with the relevant groups and associations.

### 2<sup>nd</sup> phase

The key issues can then be identified that the Roadmap shall address. This shall be a product of both the analysis performed in phase 1 and through consultation with stakeholder organisations.

### 3<sup>rd</sup> phase

The final phase shall be the development of the IT and Communications roadmap providing an EU wide IT development and guidance plan including data exchange principles and criteria, IT communication standards, protocols, security and implementation. This shall be done in close cooperation with other European stakeholders. It is planned to be delivered during 2010.