

GTE+'s 2010 Annual Work Programme Consultation

- Initial thoughts

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Executive Summary

Progress to date

GTE+, a workgroup to enable progress towards ENTSOG, started work in February 2008.

GTE+ is making progress towards designing and establishing the ENTSOG as well as delivering tangible progress towards the single European market, particularly within the areas of transparency, Ten Year Network Development Plan and capacity.

The objectives for GTE+ were, and remain, two-fold; to establish the basis for ENTSOG (the Organisational Development Project) and to demonstrate some progress towards a better functioning market in the pre-Third Package environment.

Role of this consultation process

The Third Package framework is now defined and hence this consultation affords an opportunity to define activities that will contribute to progress before the Agency and ENTSOG become fully functional.

Feedback is sought on the content of this document until the end of August 2009.

GTE+ wants to understand the views of Commission, regulators, Ministries and stakeholders as to how the 2010 AWP should be formulated to enable the next steps towards the formal ENTSOG and to deliver further progress that will enhance the prospects of timely delivery of the single European market.

The initial suggestions for Project Plans recognise that the participation of all major actors will be essential to ensure 2010 AWP delivery that is timely, efficient and which recognises, and takes due account of, all actors contributions.

Next steps

GTE+ is ready to work more. It therefore seeks views about all of the projects included in this document. Additionally specific feedback on three particular areas to inform the 2010 AWP formulation would be appreciated, namely:

- establishing ENTSOG

Draft Articles of Association, Rules of Procedure and potential list of members later this year. Views are sought as to whether TSOs should establish ENTSOG at the start of 2010 ahead of the timescales established under the Third Package.

- trialling of Third Package “code development process”

There may be merit during the interim period before the Third Package can be formally implemented to trial, or pilot, the Framework Guideline and code development processes. This would involve the Commission, regulators and GTE+ (or ENTSOG) having lead responsibility for their part of the process.

GTE+ proposed, and the Commission has endorsed that capacity should be selected as a priority. The scope of this pilot is being defined. Timely feedback on the scoping is sought together with other subject areas (and scoping wherever possible) that might be considered for additional pilots during the interim.

- Specific GTE+/ENTSOG lead projects

GTE+/ENTSOG would expect to lead other areas of activity e.g. Transparency, Ten Year Network Development Plan, IT Roadmap and Maintenance Information Publication where it is in a position to do so. Some of these are areas where ENTSOG leadership is defined in the Third Package; others where contributions can contribute to market development.

GTE+ would also welcome views as to the value and appropriateness of the plans included in this document. Additionally views are sought as to other areas in which projects might be necessary or what other preparatory work might be necessary to support projects that might be defined later (e.g. in respect of Balancing and Tariffs which are currently the subject of Commission led consultant's studies).

Background

Objectives of document

This document is the first communication that GTE+ has made to stakeholders about its initial proposals for the 2010 Annual Work Programme (AWP).

GTE+ wants to engage with stakeholders, Commission, regulators and Ministries to ensure that the 2010 AWP is evolved to ensure that the programme meets the requirements of all actors as far as reasonably practical and to lay the foundation for progress towards the single European gas market both before and after the institutions and processes envisaged in the Third Package¹ become operational.

We have supplied a template for submission of responses in the Appendix and would welcome such feedback by the end of August to Nigel Sisman (nigel.sisman@gie.eu) and copied to gie@gie.eu.

We would also welcome dialogue with anyone wishing to explore any issues associated with this document, the current work of GTE+ or future activity of European Network of System Operators for Gas (ENTSOG). Should you wish to meet please contact Nigel Sisman.

GTE+ creation and progress to date

The Third Package defines a new framework to better enable progress towards liberalised and open European markets for gas and electricity.

Whilst the detail of the framework has only recently been confirmed the European gas TSOs within GTE created a new workgroup, GTE+, with some dedicated staff to work closely with the Transmission System Operator (TSO) representatives in GTE.

GTE+ was established in February 2008 with the appointment of three staff and immediately set to work to deliver progress towards establishing ENTSOG as envisaged by the then draft Third Package proposals.

GTE+ conducted its first Annual Work Programme (AWP) consultation last year and has been working on this during 2008 and 2009,

The Third Package and associated challenges

The Third Package has been endorsed by the Council and Parliament and will shortly complete its process.

However the Third Package has lead-times associated with many features including the establishment of the Agency (at least 18 months after Third Package ratification) and ENTSOG (which cannot be formally established for at least another 8 months after the Agency is fully functional).

Thus during this "interim" period the arrangements and work programme should be structured to continue the delivery of market benefits during this period and to lay the foundation for timely progress once the formal processes envisaged within the Third Package are operable.

¹ As adopted by the 25 June Council concerning the internal energy market, approving all the European Parliament's second reading amendments (11271/09 (Presse 191))

Thus GTE+'s initial view is that the 2010 AWP should cover a range of activities including: establishing ENTSOG, trialling the Third Package processes and some specific GTE+ Project Plans.

Establishing the ENTSOG

GTE+ will deliver draft ENTSOG Articles of Association, Rules of Procedure and a potential list of members to the Commission and regulators during October 2009. GTE+ also intends to produce an indicative budget for 2010 consistent with the conclusions of this consultation. Additionally GTE+ will ensure that the draft texts and budget projection are available on its public website.

The formal establishment of ENTSOG envisaged by the Third Package can only take place after the establishment of the Agency.

However resources are expected to increase during 2010 to meet the requirement of the 2010 AWP giving rise to increased costs. To date GTE members have paid a flat rate fee for GTE+; this may not be appropriate as costs increase. Additionally if the Third Package processes are to be trialled next year it may be appropriate to introduce the anticipated ENTSOG governance arrangements. Thus it may be appropriate to contemplate establishing ENTSOG at the start of 2010 ahead of the time in which the "formal" ENTSOG can be established.

GTE+ will seek assurances from regulators that the costs of TSO participation in GTE+/ENTSOG activities are recoverable in tariffs.

Views are sought on the appropriateness of starting ENTSOG at the start of 2010.

Trialling of Third Package processes

GTE+ has indicated its willingness to trial the Third Package processes particularly with regard to code development. It is vital that the split of responsibilities implied by the Third Package is tested as soon as reasonably practical and ahead of formal establishment of Agency and ENTSOG. At the Madrid XVI Forum on 28/29 May GTE+ indicated that it believed that a suitably scoped priority from within the capacity area should be defined for the first trial.

GTE+ anticipates that it will continue working with the Commission, regulators and stakeholders to enable the Commission to define the priority. It is envisaged that the regulators will deliver a Framework Guideline and present it to the Madrid XVII Forum. Subject to receiving an invitation from the Commission GTE+ (or ENTSOG as it might then be) would commence work on the code development processes using the development and consultation processes that have been developed with stakeholders.

It may be appropriate to consider other priorities to pilot the processes and hence views on this, and other potential trial areas, are sought as part of this consultation as input for discussion with the Commission.

Specific GTE+/ENTSOG Project Plans

There are other areas where early inputs from either Commission or Agency may not be necessary and where GTE+ (or ENTSOG if it is established) can lead developments that will offer benefits to the market. These include transparency, Ten Year Network Development Plan, maintenance plan publication and the IT communications roadmap.

Views are sought on the scope of these projects and their value to the market. Additionally views are sought on other projects that stakeholders might want included as plans.

GTE+'s initial thoughts for 2010 AWP

GTE+'s initial thoughts about the Project Plans that might comprise the 2010 AWP are described in the next section of this report.

Annual Work Programme Development and Consultation Processes

These proposals are designed to represent initial views.

It is intended that the individual project plans will be evolved in the context of discussions with stakeholders, regulators and the Commission. Furthermore the final conclusions document and discussions with the Commission may well inform the selection, and definition, of priority areas that might be used to pilot the processes envisaged within the Third Package.

GTE+ welcomes the opportunity to explore the proposals made in this document with any interested party. Should you wish to meet, or to talk by telephone, to discuss your views on the proposals please contact Nigel Sisman (nigel.sisman@gie.eu) to arrange the relevant meetings. We would also value your written feedback and completion and return of the template contained in Appendix 1 by the end of August and which is downloadable from our website.

Part 2 - Project Plans

Establishing ENTSOG
Capacity Product Co-ordination
Transparency
European Ten Year Network Development Plan
European Winter and Summer Outlooks
Balancing
Procedure on Harmonization of Maintenance Publication
IT & Communications Roadmap

GTE+ Project Plan

Establishing ENTSOG

Objective

To establish an organisation structure (including statutes and rules), populate the interim structure to deliver the agreed work programme and, if possible, create the ENTSOG at the start of 2010.

Deliverables

Despatch draft ENTSOG Articles, Rules of Procedure, list of potential members to regulators/Commission and stakeholders during 2009.

Complete and implement GTE+/ENTSOG Annual Work Programme for rest of 2009/2010

Produce and implement plan to enable establishment of ENTSOG (at start of 2010 and to the extent possible)

Conduct and finalise AWP for 2011/12

Background

The Third Package is now agreed and so the ENTSOG role is now understood. GTE wants to establish the ENTSOG as soon as reasonable practical subject to appropriate regulatory commitments to recognise TSOs efforts and to remunerate associated GTE+/TSO costs.

GTE+ has worked with stakeholders during 2008 and 2009 and now wishes to expand its resources to better prepare for the formal environment in which both Agency and ENTSOG will function and to achieve better progress in the interim.

Before the establishment of Agency and the formal creation of ENTSOG GTE+ wishes to act as far as possible like the future ENTSOG so that it can continue to deliver initiatives offering benefits to the market and to trial the processes envisaged within the Third Package (particularly in relation to Framework Guideline and Code development).

Assumptions

TSOs receive sufficient comfort from regulators about being remunerated for the costs associated with implementing the final agreed work programme and subsequent TSO, GTE+ and ENTSOG costs.

Plan

The following diagram shows the expected timeline for this project:

Organisational Development Timeline - draft v0p1	2009												2010											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Deliver ENTSOG Articles of Association, Rules of Procedure, List of potential members	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y												
GTE+ 2nd Annual Work Programme Consultation (for 2010)																								
Prepare and publish consultation document																								
Stakeholder engagement																								
Finalisation of Programme to end 2009																								
GTE+ to ENTSOG evolution																								
Confirmation of ENTSOG Establishment Plan																								
Estrablish regulatory commitment to Plan																								
Start ENTSOG, including Transition Manager, President and SMS																								
Further expansion of ENTSOG Team																								
First ENTSOG Annual Work Programme																								
Receive inputs from Commission on priorities																								
Stakeholder engagement to inform initial proposal																								
Prepare and publish consultation document																								
Stakeholder engagement																								
Finalisation of 2011/12 AWP																								
Agency endorsement of Plan																								
Formal establishment of ENTSOG*																								
Formal submission of ENTSOG AoAs/RoPs to Agency																								
ENTSOG established (as soon as possible)																								
*indicative timing only - processes will start as soon as possible																								

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

Deliver ENTSOG Articles, Rules and potential list of members

This work will be completed by October 2009. The documents will be supplied to Commission, regulators and stakeholders for comment.

GTE+ 2nd Annual Work Programme Consultation (for 2010)

This document represents the start of this process. The intention is to build a work programme for late 2009 and 2010 that seeks to satisfy the requirements and priorities of stakeholders. GTE+ will seek to engage with stakeholders as requested to complement formal responses.

It is intended that the consultation conclusions will provide an opportunity to define clear responsibilities between regulators and GTE+ for activities where Third Package processes are to be trialled. Feedback from regulators is therefore encouraged.

Where appropriate GTE+ will seek to align its conclusions with any views expressed by the Commission about priorities.

GTE+ to ENTSOG evolution

To expand work it will be necessary to expand resources and to find new premises. This will increase costs which may necessitate other changes (eg fee apportionment within the TSO organisation).

It is envisaged that following finalisation of the 2nd Annual Work Programme resourcing requirements for 2010 will be clearer.

Whilst a decision to recruit a Transition Manager has already been taken, and the search process started, it is envisaged that further resourcing requirements will be confirmed later this year. Therefore it is anticipated that further resourcing decisions will be taken about expanding resources during 2010.

Additionally GTE+ will consider whether a new organisation has to be created that might seek to implement as much as possible of the proposed ENTSOG statutes and rules during 2010. This might involve creation of an “informal” ENTSOG.

First ENTSOG Annual Work Programme (2011/12)

Rather than wait until after ENTSOG is formally established before formulating the first ENTSOG Annual Work Programme it is intended to finalise a work programme during 2011.

If the “informal ENTSOG” is established during 2010 then this process can be conducted under proposed ENTSOG governance processes.

Formal establishment of ENTSOG

The aspiration is to complete all essential aspects of establishing ENTSOG (as envisaged in Third Package) as soon as reasonably practical. The plan identifies formal establishment of the ENTSOG after formal submission of Articles of Association and Rules of Procedure to the Agency. The earliest anticipated date that these documents can be formally received by the Agency is determined by the timescales defined in the Third Package. The timeline therefore depends on formal completion of the Third Package and hence submission of the Article, Rules and potential list of members is expected to be delayed compared with that shown in the diagram.

GTE+ would like to explore with Commission and regulators the scope to establish the ENTSOG ahead of the timescales envisaged in the Third Package so that the ENTSOG might be fully functional as early as possible during 2011.

GTE+ Project Plan

Capacity Product Coordination

Objective

GTE+ has developed the following objectives covering the short to medium-term timeframe relating to the Capacity Product Coordination Project:

- To create a basis to be ready for the commencement of starting work on a Pilot Network Code for cross-border Capacity.
- To enhance the understanding of issues e.g.:
 - Applying standard products
 - What allocation method should be applied and
 - Identifying the suitability of congestion management procedures that could be implemented.
- To support ERGEG in the development of Framework Guidelines.
- To draft a Pilot Network Code for capacity in order to trial the ways of working resulting from the Third Energy Package.

GTE+ considers that progress should not be delayed whilst all the formal mechanisms are developed and put in place.

Deliverables

As detailed above GTE+ aims to start work on Code Development as soon as possible in order to make a timely and tangible progress in this area. In addition the Capacity Product Coordination group within GTE+ has already begun preparatory work in anticipation of the Third Package.

Several work areas were identified which are a basis for further development in a Network Code. These areas encompass a Standard Capacity Product definition, a Capacity Allocation Methodology investigation; and an evaluation on Congestion Management Procedures. Work on the first two subjects has already begun, whilst the area of Congestion Management is to be considered in the near future.

GTE+ wishes to gain an in-depth understanding of what the Stakeholders consider relevant with respect to the three topics as it provides an important contribution to the development of the Pilot Network Code for capacity. Equally a need to understand which characteristics of these areas could be applied on a pan-European basis is important as they must be clear to further define how capacity sales should function on an overarching basis. Therefore GTE+ will be seeking the views of the Stakeholders on these three capacity areas, the results of this work will be published and will provide a foundation for further work on a Network Code.

Thereafter, GTE+ intends to deliver a Pilot Network Code Project Plan covering the process of producing a Code for capacity. A prerequisite for such progress will be that the National Regulatory Authorities (NRAs) submit appropriate and timely Framework Guidelines; furthermore GTE+ members are willing to support ERGEG on this important work. On the basis of the developed Framework Guidelines and the preparatory work detailed above, GTE+ would then seek to develop a Draft Pilot Network Code following a formal decision from the Commission requesting GTE+ to propose such a Pilot Code.

To support the plan GTE+ is providing key resources from TSOs with relevant experience in the capacity area. This core team will be tasked in the development of this key deliverable over the next few years.

Background

The GTE+ work relating to the area of Capacity Product Coordination has been ongoing during the past two years. Originally being set up as an internal group to initially investigate what capacity services are sold by TSOs, the scope was then subsequently enlarged to a greater extent with the introduction of GTE+.

During the initial stages, a wide-ranging analysis of European TSO capacity systems was conducted and recommendations towards an enhanced level of compatibility across Europe were drawn. The findings were captured in a consultation document and shared with all Stakeholders (including Regulators and Users of the transmission systems). To further discuss the topic a Customer Workshop with a subsequent consultation phase was held in 2008 which enabled GTE+ to receive feedback and generate an understanding of what the different market participants considered important to them.

Taking the feedback into account, the Consultation document was revised and a Final First Phase CPC Report was published in April 2009. In addition to the improvement of some of the recommendations, the definition of work areas and goals for the Capacity Product Coordination Project was extended to include the future focus covering Standard Capacity Products, Capacity Allocation Methods and Congestion Management Procedures.

This project plan was set-up to be adaptive to external developments from (for example) the European Commission, Stakeholders or ERGEG. GTE+ would welcome work on Framework Guidelines and Codes for capacity to be started as soon as reasonably possible.

Assumptions

The preparatory work undertaken by GTE+ will constantly require the participation of Stakeholders. It will be necessary to seek and gather proactive feedback from the market on any interim results and progress made within the project to ensure that progress is made in the appropriate direction. Therefore GTE+ intends to hold individual work sessions with Stakeholders and in addition Customer Workshops are to be planned.

Moving towards a Third Energy Package in the development of a Framework Guideline and Pilot Code is envisaged to be done in collaboration with the System Users, ERGEG and the European Commission. GTE+ has started a close collaboration with ERGEG which is considered to be a sound basis for achieving a tangible outcome.

To meet the timeline outlined below, GTE+ has made the assumption that ERGEG will deliver a Pilot Framework Guideline in November 2009. Furthermore, to reach the overall objective of recommending a Pilot Code by the end of 2010, GTE+ assumes that it will actively participate in the development and will contribute to the process with its expertise.

According to the Third Energy Package, a Code Development process is started upon the request of the European Commission. This time plan was created assuming that the European Commission would invite GTE+ to start the Code Development by the latest in July 2010.

Accordingly if the above assumptions are not met an adjustment of this project plan will need to be conducted to reflect any new or changed developments by other parties that may affect the time schedule.

Depending on the scope of a Draft Network Code for capacity a common primary capacity allocation mechanism may need to be established for all Member States. In this regard GTE+ would consult with Users as to what method may be preferred on a common basis. If a clear outcome could be generated then subsequent work on defining a requesting procedure on an EU level may be feasible.

Congestion Management Procedures Evaluation

Within the scope of a Pilot Network Code is the agreement upon a compatible Congestion Management Procedure. The aim of the preparatory project is to identify a number of CMPs which can be recommended on a common European basis. This may well require a common environment as a pre-requisite to implement any such measure.

The outcome of the preparatory steps above, will feed into the Pilot Code Development process. The objective is that the results of these investigations are drawn together by April 2010.

Pilot Framework Guideline Development

Madrid Forum XVI concluded that a Pilot Network Code for capacity should be elaborated. In this regard ERGEG is expected to develop a respective Framework Guideline and present the progress of this work in the next Madrid Forum in January 2010. A first Pilot Framework Guideline is expected by June 2010. GTE+ offers its expertise in such process and is looking forward to start the collaboration with the NRAs and Stakeholders from the middle of 2009.

Code Project Plan / Launch Documentation

In order to be prepared for the subsequent drafting of a Pilot Network Code a Code Project Plan needs to be created which should define:

- How the Stakeholder Joint Working Session is to be organised
- Roles and responsibilities
- What the milestones are
- What the deliverables are
- What resources are required

GTE+ envisages commencing work on the plan at the beginning of 2010, the plan should then be finalised in July after a consultation process which should be held before the summer of 2010.

Included in this work will be the Launch Documentation which will provide the first thoughts on what GTE+/ENTSOG considers as the relevant content for the Pilot Code.

Major elements of phase 2 of the Project

After ERGEG has submitted the Pilot Framework Guidelines and the European Commission has approved it, GTE+ wishes to start drafting the Pilot Network Code on Capacity in the second half of 2010. Therefore, GTE+ beforehand need to organise the Stakeholder Joint Working Sessions. The aim of these sessions is to create a permanent discussion forum with Stakeholders on the content of the Pilot Network Code which is to be prepared by GTE+/ENTSOG. The draft Pilot Network Code, which is expected to take six months to formulate, will be followed by a Consultation. The feedback received will assist in finalising the Code, and to agree the package among Stakeholders and GTE+/ENTSOG. With regards to the above steps, the final recommendation of the Pilot Network Code by GTE+/ENTSOG is intended to take place in June 2011.

GTE+ Project Plan

Transparency

Objective

To contribute to enhanced transparency regarding the activities of transmission system operators in Europe.

Deliverables

- To improve data quality provided on the Transparency Platform and increase the number of TSOs actively participating in the project.
- To further develop the Transparency Platform reflecting stakeholders' feedback.
- To coordinate and support TSOs in implementing voluntary transparency at the national level.

Voluntary transparency is to be understood as any transparency requirement going beyond the current legal obligations of TSOs and defined in particular in the framework of the MinTra list, and the recent Commission's proposal for amendment of Annex to the Regulation on conditions for access to natural gas transmission networks to be formally adopted under 3rd energy package. It would also cover an earlier implementation of transparency requirements defined in the 3rd energy package regulation mentioned in the previous sentence.

Background

In line with the AWP 2009, GTE+ has been working, along with ECG Erdgas Consult, on the development of the Transparency Platform. As of 28 May 2009 the Transparency Platform delivers all features envisaged last year plus some additional ones which were added on the basis of stakeholders' feedback. Key milestones in the implementation of the Transparency Platform are as follows:

Date of launch	New features	Comments
17 November 2008	TSO-related information General information on the transmission system Links to specific web pages of the TSO Capacity information (18 months ahead) Tariff information Search functionality Interactive map	Launch of the Transparency Platform Integration of the Interoperability Map developed by GTE in 2007
17 March 2009	Switch of unit for the display of capacity data from Nm ³ /d to kWh/d	Based on stakeholders' request
2 April 2009	Balancing model information CAM information Capacity download facility Additional links to specific web pages of the TSO	
28 May 2009	Flows (allocations) Nominations Renominations Interruptions Download facility	Historical data up to 36 month into the past

As of June 2009, the Transparency Platform provides information on 27 TSOs. 17 out of the 27 are actively participating TSOs that update the information on regular basis while information on the other 10 was collected from public sources by GTE+ and does not cover all the features offered by the Platform.

Assumptions

The Transparency Platform has proved a useful tool not only to network users but also to other stakeholders. There is however room for improvement, in particular concerning data quality and the number of TSOs actively participating with regards to all the TP’s features. Feedback and support from network users, respective national ministries and regulatory authorities, especially with regards to encouraging TSOs to participate in the project, is needed. The same applies to implementation of additional voluntary transparency. For the implementation to be successful, it is crucial that NRAs will agree to cover respective TSOs’ costs.

Plan

The following diagram shows the expected timeline for this project:

Transparency	2009												2010											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Launch of AWP-2009 last stage of TP	■																							
Improvement of data quality and increase in number of participating TSOs		■	■	■	■	■	■	■	■	■	■	■												
Further development of TP																							■	
Workshop with stakeholders									■															
Preparation of Functional Specifications										■	■	■												
Development																			■					
Implementation																							■	
Coordination of and support to TSOs in implementing voluntary transparency at the national level																							■	

Note:

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

Improvement of TP data quality and increase in number of participating TSOs

This stage covers improvement of the static data to achieve a high-level of information consistency as well as improvement of the dynamic data to always present up-to-date information. GTE+ will also actively promote involvement of all European TSOs in the project.

Further development of Transparency Platform

Concrete proposals will follow the workshop with stakeholders. Further development may go in the direction of greater scope of the Platform, more static data, more dynamic data, and/or more interactive features.

Coordination of and support to TSOs in implementing voluntary transparency at the national level

GTE+ will actively promote voluntary transparency defined under the deliverables (see above).

GTE+ Project Plan

European Ten Year Network Development Plans 2009 and 2010

Objective

Development of non-binding European Ten Year Network Development Plans by the end of 2009 and 2010 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

The non-binding European Ten Year Network Development Plans are foreseen to be published by the end of 2009 and 2010 respectively. It should be stressed that TSOs cannot deliver on this alone, and input from other market participants will be required throughout the process. Therefore the development of both plans will be accompanied by a stakeholder dialogue to seek input from market participants to the development of the required scenarios on gas supply and gas demand.

Background

The Third Package foresees the development of a non-binding European Ten Year Network Development Plan every two years by the European Network for Transmission System Operators (ENTSOG).

In the first half of 2008, GTE+ developed a work programme under consultation with European stakeholders which included the development of a European Ten Year Network Development Plan by the end of 2009. It was decided to change the title of this non-binding document to European Ten Year Network Development Plan, in accordance with the new regulation.

The intention of the plan 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 Plan 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 document 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.

Individual investment decisions are a matter for the respective TSOs. TSOs will continue to base their investment decisions according to their decision-making processes in line with the applicable European and national legislation.

The GTE+ Ten Year Network Development Plans will identify the ability of the system to meet supply and demand scenarios developed in co-operation with stakeholders through reporting on capacity evolution and potential mismatches/bottlenecks based on the supply and demand scenarios. However, GTE+ envisages that in subsequent reports, and especially those that will be developed once the formal basis will have been provided via the Third Package, more detailed work will be possible and developed by ENTSOG.

Under the Third Package ENTSOG will be responsible for conducting modelling of the integrated network. GTE+ will continue to progress towards ENTSOG network modelling in 2009 and 2010. The stakeholder dialogue will be used to also discuss appropriate modelling methods with European stakeholders.

The development of the European Ten Year Network Development Plan 2009 has been started beginning of 2008. In the first phase, information on the capacity development was provided by European TSOs. This information included investments into transmission capacity for which the final investment decision has been taken as well as information on capacity development or projects where such decision is still pending. The results of this work were published in a Capacity Development Report in November 2008.

In the second phase, demand scenarios were collected in close co-operation with European stakeholders. Two stakeholder workshops as well as intermediate bilateral meetings were conducted to accomplish this task. The demand scenarios will be compared against capacity evolution in a Demand Scenarios vs. Capacity Report to be published by July 2009.

Assumptions

As foreseen in the Third Package, the Ten Year Network Development Plans will be built on national development plans and take into account Community aspects of network planning, including the guidelines for trans-European energy networks in accordance with Decision No 1364/2006/EC of the European Parliament and of the Council.

Based on supply and demand scenarios and capacity evolutions at all major European interconnection points, the European Ten Year Network Development Plans will identify capacity gaps/mismatches for cross-border capacity.

The European Ten Year Network Development Plans will include the development of supply and demand scenarios. The stakeholder dialogue will be used to receive stakeholder input to these supply and demand scenarios. 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 European Ten Year Network Development Plan. This stakeholder dialogue will likely, in part, be facilitated through workshops to engage with stakeholders and identify requirements to ensure that stakeholder needs are fully reflected.

It is foreseen to reflect the capacity development projects supported by the European Energy Programme for Recovery including the reverse flow projects in the European Ten Year Network Development Plan 2010.

Plan

Given the challenges associated with producing the European Ten Year Network Development Plans, intense stakeholder interaction is foreseen in their development. The following diagram shows the expected timeline for the stakeholder interaction on the plan development:

GTE+ European Ten Year Network Development Plans 2009 and 2010	2009						2010											
	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Publication Demand Scenarios vs. Capacity Report	■																	
Stakeholder dialogue	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Data collection		■	■				■	■	■	■	■	■	■	■	■			
Stakeholder workshop				■			■										■	
Publication European TYNDP						■												■

August 2009 – Dec 2009: “European Ten Year Network Development Plan 2009”

By using the results of the Demand Scenarios vs. Capacity Report to be published in July 2009 which will include demand scenarios and up-dated information of the Capacity Development Report of November 2008, supply scenarios will be developed together with stakeholders. These 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 requirements.

The stakeholder dialogue in the second half of 2009 will include a stakeholder workshop in October 2009, bilateral meetings, communication between GTE+ and European stakeholder association representatives and – if appropriate – one or more smaller meetings between GTE+ and delegates of European stakeholder associations.

The results of the stakeholder dialogue will be used for the production of the final European Ten Year Network Development Plan 2009 to be published by the end of 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.

January 2010 – Dec 2010: “European Ten Year Network Development Plan 2010”

A stakeholder workshop will be organized in the beginning of 2010 to present the main results of the European Ten Year Network Development Plan 2009 to serve as a basis for the discussion with stakeholders on the detailed process for the development of the European Ten Year Network Development Plan 2010. Stakeholder input for the main elements to be included in the European Ten Year Network Development Plan 2010 will be sought.

In October 2010 a further stakeholder workshop will be used to discuss intermediate results and to provide guidance on the next working steps. In addition, bilateral meetings and communication between GTE+ and European stakeholder association representatives and one or more smaller meetings between GTE+ and delegates of European stakeholder associations will be conducted as appropriate.



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GTE+ will continue to progress towards ENTSOG network modelling in 2009 and 2010. The stakeholder dialogue will be used to also discuss appropriate modelling methods with European stakeholders.

The results of these joint efforts will be used for the production of the final European Ten Year Network Development Plan 2010 to be published by the end of 2010.

GTE+ Project Plan

European Winter Outlooks 2009/2010 and 2010/2011 and European Summer Outlook 2010

Objective

To develop European Winter Outlooks for the winters 2009/2010 and 2010/2011 and a European Summer Outlook for the summer 2010 showing on the European level natural gas transmission capacities and natural gas consumption forecasts in peak conditions and identifying possible EU internal bottlenecks to fulfill demand under these conditions.

To work on supply information availability in 2009 and to include an European picture of the supply situation in the Winter Outlook 2010/2011.

Deliverables

The European Winter Outlooks 2009/2010 and 2010/2011 and the European Summer Outlook 2010 are to provide European stakeholders and market participants with:

- for the winters 2009/2010 and 2010/2011 a consumption forecast for peak day winter conditions for the next winter under normal and exceptionally cold conditions;
- for the summer 2010 a consumption forecast for peak day summer conditions;
- Information on entry capacities of gas transmission infrastructures at main European import points and LNG terminals;
- Information on aggregated entry capacities from national production and storages.

In 2009 an overview on which information on gas supply is publicly available in European countries will be created. In 2010 an attempt will be made to develop together with European stakeholders a European picture of the supply situation during the upcoming winter.

Background

The Third Package foresees the development of summer and winter outlooks by the European Network for Transmission System Operators (ENTSOG). In the first half of 2008, GTE+ developed a work programme under consultation with European stakeholders which included the development of European Winter Outlooks 2008/2009 and 2009/2010.

GTE+ plans to develop European Winter Outlooks for the winters 2009/2010 and 2010/2011, to develop a first European Summer Outlook for the summer 2010, to work on the supply information availability in 2009 and to attempt developing an European picture of the supply situation during the winter 2010/2011.

The European Gas Coordination Group is working on scenarios for the management of supply disruptions. GTE+ offers its support to the EU Commission and the GCG by providing its expertise in this context.

Assumptions

The European Winter Outlooks 2009/2010 and 2010/2011 and the European Summer Outlook 2010 will be based on the respective national information provided by GTE+ members (peak day consumption forecasts for the next summer and winter respectively; transmission capacities of infrastructures at main European import points, LNG terminals and aggregated entries from national production and storages).

Information availability and possible information sources on the gas supply situation during winter will be analysed in 2009 and an attempt will be made to develop an European picture of the supply situation during the winter 2010/2011.

It is foreseen to develop and apply specific assumptions to take into account the depletion of production fields and to refine the storage deliverability definition on the exceptional cold peak day. Furthermore it is foreseen in the Winter Outlook 2010/2011 to work on a definition of the storage deliverability at the end of the winter.

Plan

For both European Winter Outlooks and the European Summer Outlook 2010, three phases are foreseen. The planned timing is shown in the following diagram followed by an outline of the activities foreseen in these phases.

Winter Outlooks 2009/2010 and 2010/2011 and Summer Outlook 2010	2009						2010												
	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	
Winter Outlook 2009/2010																			
Data Collection and Analysis	■	■																	
Presentation and Discussion			■																
Final Version				■															
Summer Outlook 2010																			
Data Collection and Analysis							■	■											
Presentation and Discussion									■										
Final Version										■									
Winter Outlook 2010/2011																			
Data Collection and Analysis													■	■					
Presentation and Discussion															■				
Final Version																■			

Phase 1: Data Collection and Analysis

The development of each European Winter Outlook and the European Summer Outlook 2010 starts with the collection of the data defined above from the GTE+ Members. Data templates will be defined and distributed. The answers will be collected and evaluated. A draft European Outlook will be produced.

For the Winter Outlooks, this phase is expected to start in July and end in August of 2009 and 2010 respectively. For the Summer Outlook this phase is expected to start in January and end in February 2010.

Phase 2: Presentation and Discussion

The draft European Outlook will be presented to European Stakeholders. This possibly may be done on a Madrid Forum, a meeting of the Gas Coordination Group or another appropriate event involving a large number of European stakeholders. The feedback received in these events will be used to refine the work.

This phase is expected to be conducted in September / early October 2009, March 2010 and September / early October 2010 respectively.

Phase 3: Final Version

The final European Outlook giving on the European level an overview of transportation capacities and consumption forecasts in peak conditions and identifying possible EU internal bottlenecks to fulfill demand under these conditions will be produced.

The final version is foreseen to be produced by October 2009, April 2010 and October 2010 respectively.

The work on the European supply situation during winter will be started in 2009 by developing an overview on which information on gas supply is publicly available in European countries. In 2010 an attempt will be made to develop together with European stakeholders a European picture of the supply situation during the upcoming winter and to include it in the European Winter Outlook 2010/2011.

GTE+ Project Plan

Balancing

Objective

The objective of this Balancing Task Force work is to support TSOs in their transition towards market-based balancing regimes, in preparation for compliance with the new Regulation repealing Regulation (EC) No 1775/2005.

A secondary objective is to prepare for the process – in a later stage - of development of Framework Guidelines and the respective Codes.

Deliverables

Report on Market Based Balancing Rules

This report aims at substantiating the concept of market-based balancing rules, starting from an initial definition formulated by GTE+ Task Force (TF). The main questions driving the analysis are :

- What are market-based balancing rules?
- What functions should market-based balancing rules perform, what processes should they support and how can this be achieved?
- What are the circumstances that allow a regime based on market based rules to work effectively and efficiently?
-

The results of this elaboration will be submitted to stakeholders for consultation and the outcomes of this process will be used as input for the final report.

The views adopted by GTE+ will form the basis for work on the other deliverables.

Set of objective criteria on which the design of balancing rules shall be based

A second report will be dedicated to the identification of objective criteria for designing market-based balancing rules in a fair, non-discriminatory and transparent manner. These objective criteria should allow TSOs to design balancing rules that take into account genuine system needs and resources available to the TSO and looking forwards to market needs in 2012 and beyond.

The report on objective criteria will address issues or opportunities arising from the interaction between neighbouring gas balancing markets, as well as interactions between gas and electricity markets and give initial thoughts on regional markets.

Assessment of balancing models and legal frameworks in use

The third deliverable that GTE+ TF plans to deliver is a study of the possible barriers to the implementation of market based balancing rules (ie. national law and regulation, market conditions, physical and geographical constraints, transit etc).

Future developments of network codes can then build on these deliverables.

Background

The Regulation repealing Regulation (EC) No 1775/2005 has made a clear choice for market-based balancing rules, building upon MF XI conclusion in 2006.

In April 2009 GTE+ organised a workshop on balancing in co-ordination with the Commission. The purpose of the GTE+ workshop was to verify the conclusion of the Balancing Report published by GTE+ in December 2008. For the Commission the workshop was important to give input to KEMA for its study on balancing regimes.

The main conclusion of the workshop was that current balancing regimes are too complex leading to high costs and loss of optionality for the shippers. GTE+ should support TSOs in meeting the MF-objectives, looking at market needs of 2012 and beyond and recognize that balancing rules cannot be developed in isolation of other aspects on transmission.

Assumptions

Commission / KEMA work might lead to a Commission declaration of priority in this area (Autumn 2009). In preparation for the development of the Framework Guideline produced by ERGEG (possibly by end of Summer 2010) and the respective Codes, GTE+ has decided to work on the deliverables described above.

Input from stakeholders is necessary, especially in forming a clear view by GTE+ on what market-based rules are. The view adopted by GTE+ will form the basis for work on the other deliverables.

Plan

The following diagram shows the expected timeline for this project:

Balancing	2009												2010											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Define Market Based Balancing																								
Initial definition of market based rules																								
Publish initial view																								
Consultation with stakeholders																								
Report on market based balancing rules																								
Identify objective criteria																								
Identify genuine system needs																								
Identify market needs																								
Assessment of balancing models in use																								

Timing for the developments of network codes will be specified in 2010, based on the priorities set by the Commission and the consecutive development of Framework Guidelines.

Major element/phase (1) of Project: market-based balancing rules

To get a better understanding of ‘market-based balancing rules’:

- Identify the rationale behind and preconditions for market-based rules
- Identify the characteristics of market-based balancing systems

To consult with market and stakeholders on characteristics of market based balancing systems.

Major element / phase (2) of Project: Objective design criteria for balancing rules

The regulation states that balancing rules shall be designed based on objective criteria and that the rules shall reflect genuine system needs taking into account the resources available to the TSO. In addition the market has indicated that balancing rules cannot be designed in isolation and should also take the market needs into account, looking forward to 2012 and beyond.

To determine a set of criteria that allows TSOs to assess whether their design is compliant with the proposed 'market-based' concepts.

Major element / phase (3) of Project: Analyse transition towards market-based balancing rules

To determine to what degree 'current' balancing rules are market based and to investigate possible ways for transition towards market based rules.

GTE+ Project Plan

Harmonisation of Maintenance Publication

Objective

To determine the process which will lead to reliable and sufficient information related to planned maintenance being published in a systematic and timely and non-discriminatory manner to all stakeholders for all European cross-border interconnection points.

Thanks to this code, the publication of information regarding the planned maintenance will be harmonised, simplifying and facilitating gas transmission at European level.

Deliverables

Based on an overview of the current practices amongst the GTE members, a minimum set of recommendations has been identified by the GTE Business Rules sub-Working Group, and a process has been drawn up which leads to a maintenance program being published on the TSOs public website.

A workshop shall be organized in Q3 2009 to take market participants' suggestions into account, with a view to elaborating a code by December 2009.

The key deliverable is that market participants will be provided with a synchronized planning of works and interventions that might have an impact on the physical flows at European cross-border interconnection points. The planning shall be standardized so that the same piece of information is published for all such interconnection point (Installation or IP concerned, nature of works, timing, impact).

Background

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

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 planned 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 harmonise 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 code

and require its implementation on a national level in order to avoid disparities in the different transmission systems across Europe.

Because market participants have recently voiced concerns about the information related to maintenance in the framework of transparency related issues, GTE+ expects an active participation of all stakeholders to the workshop.

Plan

The following diagram shows the expected timeline for this project:

Harmonization of Maintenance Publication	2009												2010											
	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 existing practices through questionnaire	█																							
Workshop with Stakeholders																								
Draft a minimum set of requirements		█	█	█																				
Draft a process which enables TSOs to streamline planned maintenance publication																								
Organize workshop							█	█	█															
Presentation and discussion with Stakeholders										█														
Development of the procedure																								

1st phase

The 1st phase covered the gathering of information on the current practices with regards to maintenance publication GTE Business Rules sub-Working Group. To do this, a questionnaire has been sent to the GTE members in 2008, to which 15 TSOs have responded.

2nd phase

Data from the questionnaire has been collected and analysed in order to determine common requirements and to draft a process in order to streamline the publication of planned maintenance.

The 2nd phase will mainly focus on the feed-back from the Stakeholders, which will be collected through a workshop to be organized in September 2009.

Participants to the workshop shall be given the opportunity to comment on both the minimum set of requirements and the proposed process.

3rd phase

The 3rd phase will consist in developing and validating a final version of the procedure on harmonisation of the maintenance publication, ideally by December 2009.

GTE+ Project Plan

IT and Communications Roadmap

Objective

To develop an IT and Communications roadmap providing an EU wide IT development and guidance plan on IT communication standards, protocols and adoption principles in cooperation with other European stakeholders.

Deliverables

ITC Roadmap document.

Data exchange and principles statement.

Technical solutions framework: externally visible deliverables shall include the establishment of the IT Solutions Adoption & Implementation Group and Version 1.0 of the Data & Solutions Handbook.

Background

The Third Package gives an added impetus to the increasing liberalisation of the European gas market and on the cooperation and coordination of TSOs in the operation of their systems.

The exchange of data is a fundamental aspect in all areas of cooperation. In addition, the development of agreed common standards and protocols for exchanging data is an essential requirement in achieving interoperability amongst interconnected networks and in facilitating the development of a European market for gas.

The lack of coordination in IT related matters and the inconsistent adoption of existing voluntary common business practices provides a strong driver to deliver an EU wide guidance plan on IT and communications amongst gas transportation stakeholders.

The aim of the Roadmap is to address these issues and to facilitate the development of new communication standards and protocols and the adoption of existing ones where appropriate.

It is recognised that these standards and protocols should be developed jointly by all stakeholders but that the new ENTSOG could have a key role in facilitating their adoption and implementation.

Over the last year GTE+ has undertaken a process of engagement with the wider stakeholder community in order to move towards a coordinated approach in the development of common technical solutions involving the electronic exchange of data.

An approach to the contents of the Roadmap has now been developed, including a Technical Solutions Framework that shall detail the processes and structures required to deliver the aims of the Roadmap.

This proposal provides the timetable for the development of the Roadmap and the establishment of the required processes and structures to deliver its aims.

Assumptions

ENTSOG is established by end of 2010.

A trial of the Code development process begins at the start of 2010 requiring the support structure to identify technical solutions for the exchange of data to be in place by the middle of 2010.

Stakeholders are fully engaged and feel fully consulted with concerning the solutions development and implementation processes.

Plan

The following diagram shows the expected timeline for this project:

IT and Communications Roadmap v0.1	2009												2010											
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
Development of Roadmap document	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Development and approval to Roadmap approach	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Consultation on draft Roadmap										Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Delivery of Roadmap																								
Development of Data exchange & Criteria Principles Statement																								
Memorandum of Understanding between TSOs																								
Establish IT Solutions Adoption & Implementation Group																								
Develop "terms of reference"																								
Finalise adoption and implementation processes																								
Group established																								
Development of ENTSOG Data & Solution Handbook																								
Develop structure and content																								
Create Handbook version 1.0																								

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

Development of Roadmap document

The Roadmap is due for completion by December 2009. The drafts of the Roadmap document will be shared with stakeholders for comment.

Development of the Data Exchange and Criteria Principles Statement

This shall be a short document containing a series of agreed principles regarding the provision and use of data between relevant parties to enhance interoperability between operators and to facilitate the development of a European market for gas. The document is due for completion by April 2010 and will be supplied to the Commission, regulators and



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stakeholders for comment. These principles shall be used as a guide in the development of Codes and in the adoption of approved technical solutions for the exchange of data.

ENTSOG Data and Solutions Handbook

This handbook shall contain the sole solutions officially recognised by the ENTSOG for the electronic exchange of data. The structure and nature of the contents shall be agreed over the coming year with the first version of the Handbook being published by September 2010.

Establish ENTSOG IT Solutions Adoption and Implementation Group

This group shall consider proposals for inclusion in the Data and Solutions Handbook and shall consider practical aspects as to how to support the implementation of approved solutions. The terms of reference for this group shall be developed and finalised by March 2010. The actual processes for adoption and implementation support shall be considered over the same time frame with the Group being active in April 2010 to begin work on the creation of the Handbook.

APPENDIX

GTE+ 2010 AWP Consultation Initial Proposals

Feedback Proforma

Please use the attached template for Stakeholder feedback to the “GTE+’s 2010 Annual Work Programme Consultation – Initial thoughts” document.

Please send completed template, and/or any other feedback to nigel.sisman@gie.eu , cc. gie@gie.eu.com by 31 August 2009.

Organisation:	
Name:	

Q1: Does the programme identify the correct projects for GTE+ focus during 2008/2009?

Answer	Further comments
Yes / no	

Q2: Are there any other activities that should displace the focus areas identified?

Answer
Yes / no

If yes;

What other priorities should be addressed?	
Which elements of the plan should be displaced?	

Q3: What areas should be considered for “pilots” to test the Third Package Framework Guidelines and Network Code development processes during the interim period.

Views are sought on the desired scope of suggested areas that might be the focus of work during interim before the Agency and ENTSOG can be fully functional in their anticipated roles.

Area	Definition of scope
Capacity	

Q4: Are the objectives and deliverables associated with each plan realistic?

Organisational Development	
Capacity	
Transparency Platform	
Ten Year Network Development Plan	
Winter Outlook	
Balancing	
Code on Harmonization of Maintenance Publications	

IT and Communications Roadmap	
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Q4: If delivered in a timely and responsive manner would the programme defined in this document constitute a significant step towards the development of the internal market?

Answer
Yes / No

Q5: Do respondents have any additional comments or remarks to make about:

The proposals to establish ENTSOG	
The Work Programme envisaged in this document	
Anything else?	

Q6: Is there any advise/feedback you would like to offer GTE about how it can best facilitate the transition between today and implementation of the Third Package?

Q7: Would you like to meet with GTE members involved in each of the Project Areas and if so who would you suggest we contact within your organisation?

Subject Area	Answer (Yes/No)	Contact name	e-mail	Telephone number
Organisational Development				
Capacity				
Transparency				
Ten Year Network Development Plan / Winter Outlook				
Balancing				
Procedure on Harmonization of maintenance Publication				
It & Communications Roadmap				

Please do not feel constrained by the sizes of the boxes above. GTE+ welcomes comprehensive feedback as critical part of establishing the GTE+/ENTSOG Work Programme

Q8: Please could you indicate if your response can be published on our website.

Answer
Yes / no