

Where will Germany source its future supplies of natural gas?

TSOs publish scenario framework document as part of the 2016 NDP process

- **Projects are consistently developed, with alternative high CV gas supply sources being taken into consideration**
- **Gas quality switchover process from low CV gas to high CV gas remains a key focus**
- **Interests of distribution network operators have been taken into account based on the results of a joint study**
- **Consultation workshop to be held on 4 August 2015 in Berlin**

Berlin, 27 July 2015. The German gas transmission system operators (TSOs), whose transportation networks provide a significant contribution to upholding security of supply, have today published the scenario framework which is to form the basis for the 2016 gas network development plan (NDP). The document published today delivers a consistent further development of the scenario framework underlying the 2015 NDP and for the first time also considers an alternative scenario with regards to supply sources of high CV gas. “Security of supply can only be achieved if it is approached from a European perspective. We are therefore working to put our networks in an optimal position that will allow us to successfully respond to future developments in a European context,” says Ralph Bahke, chairman of the board of the TSO association FNB Gas. Managing director Inga Posch adds: “In launching this three-week consultation process we are inviting all market participants to share their opinions on the scenario framework with us, for example to provide their feedback on the consideration of the announced Nord Stream III and IV pipeline projects.”

The modelling works for the 2016 NDP have been based on the “Energy Reference Forecast” study commissioned by the German Federal Ministry for Economic Affairs and Energy published in 2014, which corresponds to the medium gas demand scenario described in previous NDP. In modelling the 2016 NDP the TSOs will also for the first time take into account the results of the joint study on the drivers of future capacity needs in distribution networks (“*Studie über Einflussfaktoren auf den zukünftigen Leistungsbedarf der Verteilnetzbetreiber*”). This study conducted last year by the energy research centre Forschungsgesellschaft für Energiewirtschaft mbH (FfE) was jointly commissioned by the TSOs in cooperation with the energy industry associations BDEW, GEODE and VKU.

The plans for the general switchover of low CV gas networks to high CV gas supplies in Northwest Germany, which were already a major focus of the 2015 NDP, will be updated and further refined in the 2016 NDP. The TSOs also plan to provide more detailed information on the high CV gas capacity balance in relation to storage facilities and cross-border interconnection points.

Please note:

The consultation on the scenario framework for the 2016 gas NDP will run until 14 August 2015. All market participants are invited to attend an accompanying workshop which will take place on 4 August 2015 in Berlin.

For further information please visit the website of FNB Gas at www.fnb-gas.de.

The organisation Vereinigung der Fernleitungsnetzbetreiber Gas e.V. (FNB Gas) is the association of the major German network companies operating the supra-regional and cross-border gas transportation pipelines. The association was established at the end of 2012 and has operated an office in Berlin since April 2013. One key focus of the association's activities is the Gas Network Development Plan, which has been drawn up annually by the TSOs since 2012. The association also acts as a central point of contact for policymakers, the media and the general public on behalf of its members.

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