Executive summary

This is the first implementation report on the Gas Network Development Plan (NDP) produced by the German gas transmission system operators (TSOs) under section 15b of the German Energy Industry Act (EnWG).

Since the final version of the 2016-2026 NDP has not been released yet, this 2017 implementation report covers the projects described in the 2015 NDP and in the second consultation document on the 2016-2026 NDP published on 27 February 2017.

Which of the 2015 NDP projects had been commissioned, modified or taken out of consideration by the time the second consultation document on the 2016-2026 NDP was published is described in the second consultation document on the 2016-2026 NDP.

Five of the projects described in the second consultation document on the 2016-2026 NDP have been commissioned in the meantime (see chapter 3.2), two projects have been modified (see chapter 3.3) and two projects will no longer be considered (see chapter 3.4). One of the projects is set to run into delays (see chapter 3.5). Chapter 3.6 describes potential delays that may result from the recent decision issued by the German national regulatory authority Bundesnetzagentur (Federal Network Agency) which in part amended the Scenario Framework document underlying the 2016-2026 NDP as well as potential delays due to other uncertainties related to the NDP process, which affect three projects.

In line with their approach to producing the NDP, the TSOs also report on the progress of the gas quality switchover works currently planned or under way in Germany in order to permanently convert network areas currently supplied with low calorific value gas (“low CV gas”) to high CV quality, a process which was made necessary by the current decline in German and Dutch natural gas production levels.

As part of the switchover planning process the TSOs produce low CV gas balances, both in terms of supply/demand volumes as well as in terms of capacity, for Germany as a whole and for each of the two market areas GASPOOL and NCG. For the purpose of producing these low CV gas balances the TSOs forecast supply, storage and demand developments (see chapters 4.1 to 4.4). According to these forecasts, significantly more gas will need to be imported from the Netherlands over the period to 2030 compared with the second consultation document on the 2016-2026 NDP, with the cumulative total going up from 1,245 TWh to 1,418 TWh (average year).

The analyses provided in chapter 4.5 show that the number of gas appliances to be modified each year needs to be revised up from the currently planned maximum of 450,000 to approximately 550,000 per year. Chapters 4.6 to 4.8 describe the defined switchover areas.

The TSOs believe that it will be possible to ensure continued supply security for those regions that currently receive low CV gas if the switchover works are consistently progressed as planned, temporary technical conversion measures are implemented and the conversion fee charged for the conversion of gas from high CV to low CV quality continues in place.

It should be noted, however, that timely commissioning of the projects needed for the provision of additional high CV gas supply capacity also depends on the time it takes to complete the required official permitting procedures. In order to ensure that the switchover process can be implemented on time and supply security can be maintained, it is necessary that all parties involved provide the required resources.