Executive summary

The German gas transmission system operators (TSOs) have produced this draft 2018-2028 Gas Network Development Plan (NDP) to publish the post-consultation results of the network development planning process and in so doing comply with the requirements set out in the German Energy Industry Act (EnWG) and the German Gas Third-Party Access Regulations (GasNZV). The present NDP is based on the corresponding scenario framework drawn up by the TSOs, which was confirmed by the national regulatory authority BNetzA (Federal Network Agency) on 12 December 2017.

The scenario framework for the 2018-2028 NDP builds on two scenarios mapping the potential development of German gas demand in the period to 2028. Gas-related final energy consumption was determined using figures from the EUCO30 (scenario I) and EUCO+40 (scenario II) scenarios developed on the basis of the European Commission’s current EU Reference Scenario. Both of these scenarios incorporate the current European climate targets and were used to derive final energy consumption, non-energy use and, indirectly, gas demand for district heating purposes in Germany.

According to the Federal Network Agency’s decision confirming the scenario framework for the 2018-2028 NDP, the TSOs are to model two different cases (base case and storage case) by 1 April 2018. The base case is to be modelled to determine the required additional network capacity and projects. The storage case model is to provide insight as to the storage withdrawal capacity required in specified load situations towards the end of a winter period. The results are presented in chapter 7.3.

The base case results confirm that the measures defined in the 2016-2026 NDP enable a stable development of the networks. Additional development measures will be necessary in the 10-year period under review this year.

- By 2024 some 1,384 km of new gas transmission pipelines and around 499 MW in additional compressor capacity need to be built, requiring a total investment spend of approximately €6.8 billion including pressure control and measurement equipment.
- By 2029 some 1,390 km of new gas transmission pipelines and around 499 MW in additional compressor capacity will be necessary, resulting in a total of approximately €7.0 billion in investments (including pressure control and measurement equipment) to be made over the space of the next ten years.

Most of the additional measures not already included in earlier editions of the NDP relate to the market demand assessment and capacity auctions carried out as part of the “more capacity” project. The associated costs have now been taken into account in deriving the TSOs’ network development proposals, with particular consideration being given to utilisation of the existing infrastructure.

The TSOs assume that the costs of the EUGAL measures can be fully recovered from the EUGAL transmission revenues if the long-term capacity booking rate continues at the current level in the future.
Over the past years an increase in earthquakes has been registered in the region surrounding the Groningen gas field in the Netherlands, which are assumed to be related to the field’s gas extraction activities. The most recent earthquake to hit the Groningen region struck on 8 January 2018 and reached a magnitude of 3.4 on the Richter scale. In the wake of this earthquake the political debate over Groningen gas production has intensified. At the time of drafting the 2018-2028 edition of the NDP no specific information has emerged as yet regarding the outcome of these discussions. The German TSOs have been liaising closely with GTS, both in this matter but also generally for the purpose of coordinating the plans being developed in the Netherlands and in Germany. GTS and the TSOs will progress these discussions on a regular basis to ensure that the network planning process in both countries continues to be based on harmonised assumptions. According to statements by the Federal Network Agency and the Dutch Ministry of Economic Affairs, information on the associated impact on Dutch exports to Germany is not expected to be available until early summer 2018.