



Bundesnetzagentur

Conditional products on the German market - Status quo and current developments

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ACER workshop on conditionalities

Brussels, 4 December 2018



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Agenda



Status Quo

BNetzA's view on conditional capacities

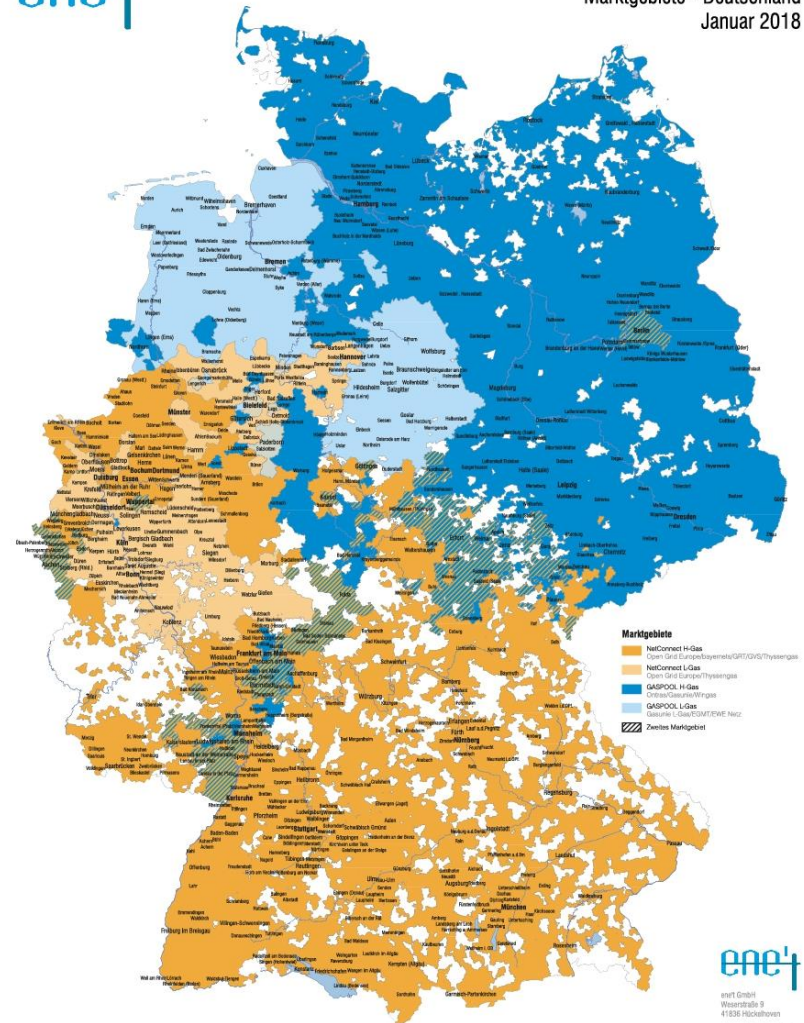
Current developments



- 16 TSOs
- 2 entry exit systems:
 - NetConnect Germany (NCG)
 - GASPOOL (GPL)
- 2 gas qualities
- Biggest gas consumption in the EU
- Transit country
- High storage volumes
- Growing demand from power plants



Karte der Marktgebiete Gas
Marktgebiete - Deutschland
Januar 2018



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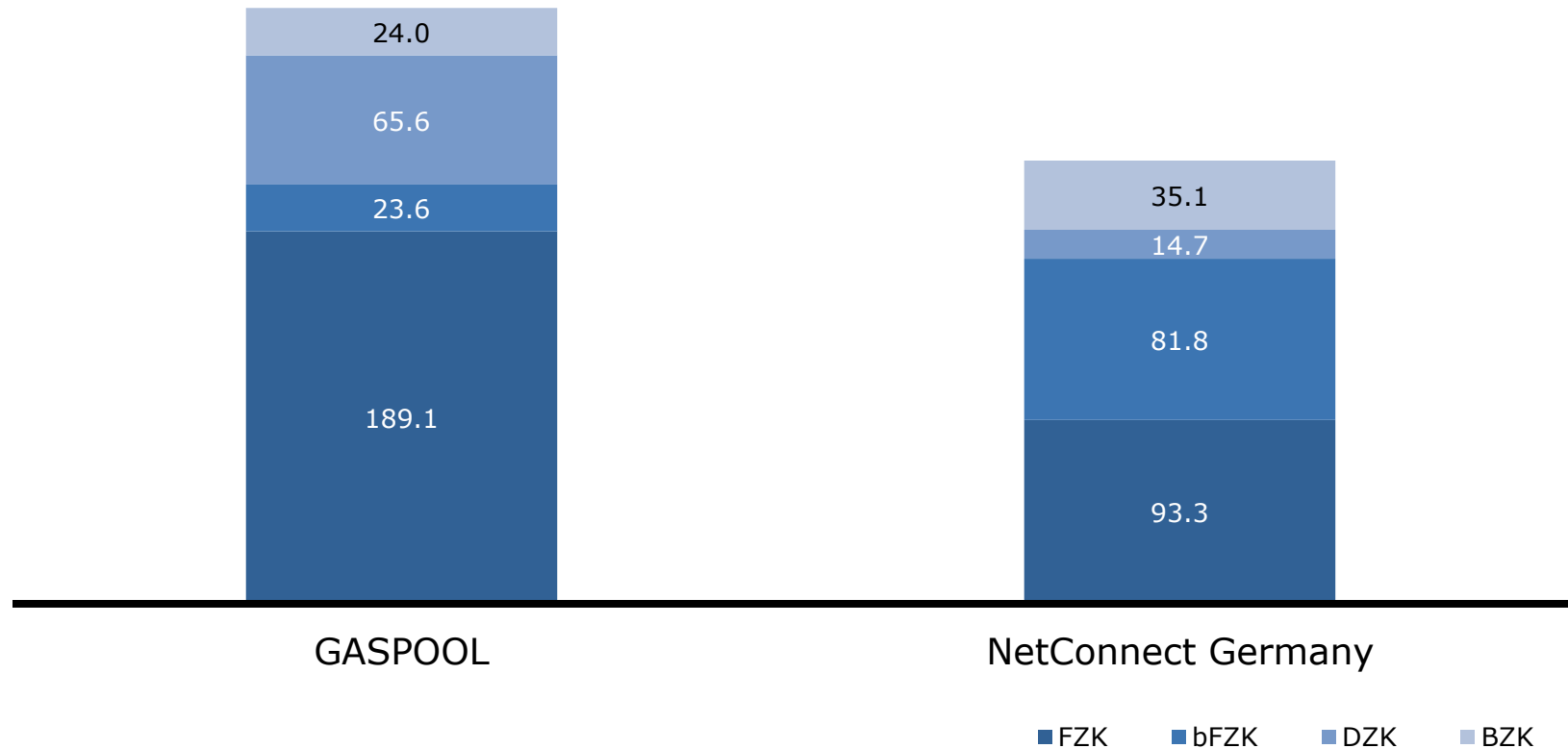
Source: <https://www.enet.eu/portfolio/analysen/karten>



- Provision from gas network ordinance (GasNZV):
*[...]transmission system operators shall examine economically reasonable measures to increase the volume of decoupled capacity on offer. They shall examine the following measures, in particular, in the following order–
[...]*
 - 2. the offer of entry and exit **capacity linked [...] with particular transport path specifications**; these requirements are to be kept to a minimum;*
 - 3. the exclusion of individual entry and exit points from use on a decoupled basis; these requirements are to be kept to a minimum.*
- No approval of any capacity products or contracts foreseen in German regulation
- But: Ex-post supervisory



- Offer of entry capacity in German market areas (GWh/h) in 2017





- As a regulator neither in favour of, nor against conditionalities
- Full free allocability of capacities and costs for the network user have to be balanced by the TSO
- Importance of transparency: which conditions or allocation restrictions apply to the respective products?



Initiation of determination proceedings on standardising capacity products ("KASPAR") in June 2018:

- Question, if capacity with restricted allocability (BZK) could be substituted by dynamically allocable capacity (DZK)
- Addressed issues regarding the harmonisation:
 - Harmonisation with respect to the interruption order
 - Capacity with conditional firmness should be made better foreseeable for shippers
 - Allocation options only limited by network topology (and not restricted to the individual TSO)



- Due to national law the German TSOs are forced to merge the two existing market zones
- New, single entry-exit system starts on 1 October 2021
- Possibilities of allocating entries and exits will increase:
 - Reduction of capacities or more conditionalities
 - Market based measures to maintain current capacity levels (e.g. OSBB, flow commitments)
 - Investments in infrastructure
- Discussions between TSOs, NRA and stakeholders have to be intensified