

2014 Network Development Plan (NDP) for gas emphasizes market conversion from low cv gas to high cv gas

- **Transmission system operators (TSOs) to hand over draft NDP to national regulatory agency Bundesnetzagentur (BNetzA)**
- **Investments to rise to €3.1bn by 2024**
- **Total of 49 comments received during consultation**

Berlin, April 1, 2014. For the third year running, Germany's TSOs are to hand over the NDP for gas to BNetzA today. The draft lists more than 50 projects for expanding the national gas infrastructure over the next 10 years and is based on a scenario framework which BNetzA confirmed in Oct. 2013. Investment for the planned upgrades will amount to some €1.8bn by 2019 and reach a total of €3.1bn by the year 2024.

NDP 2014 focuses on the gradual conversion of areas now using low cv gas to high cv gas, a step required as low cv gas production declines in Germany and imports from the Netherlands will also fall after 2020. In the words of Inga Posch, managing director of the association of German TSOs (FNB Gas) „the new NDP again makes supply security our main agenda with practical steps toward market conversion“.

Major upgrades (shown in the map) are planned in southeastern and northwestern Germany. For details see the project characteristics now included as a new feature in the 2014 NDP. As a next step, BNetzA will again consult all market participants and then publish the results. Amendments and modifications required are then to be incorporated into the NDP by TSOs.

NDP 2014 consultation

This revolved around the draft document published on Feb. 17, 2014 at www.fnb-gas.de/netzentwicklungsplan where market actors were given three weeks to comment on. In addition, German TSOs invited the public to a workshop on Feb. 24, 2014 where the NDP was explained and discussed. Klaus Peters, one of the participants and asset manager for Westnetz GmbH, had this to say about the approach taken by TSOs:

„I can see NDP 2014 shaping up in quite a positive way because it has taken a definite turn towards assuming capacity needs of distribution system operators on the basis of their forecasts, at least until 2019. In addition, these operators together with those of

transmission systems are now seeking to improve earlier approaches to projecting capacity demand. What I appreciate very much about the plans for L gas/H gas market conversion is that they go beyond the time frame of NDP 2014. This is a particular challenge where we need planning reliability until all work has been completed and, at the same time, have to work closely and find solutions jointly with TSOs“.

To this Posch added that „proposals from a total of 49 written comments received have been incorporated into the draft NDP 2014, and I would like to thank all those involved for their very open and constructive contributions which have made this a valid process.“

Vereinigung der Fernleitungsnetzbetreiber Gas e. V. (FNB Gas) is the association of German transmission system operators, i.e. the operators of the major supra-regional and cross-border gas pipelines. The Association was established at the end of 2012 and has operated an office in Berlin since April 2013. One main focus of the Association's activities is the Network Development Plan Gas, which has been drawn up annually by the transmission system operators since 2012. Furthermore, the Association represents its members as a point of contact for politicians, media and the public.

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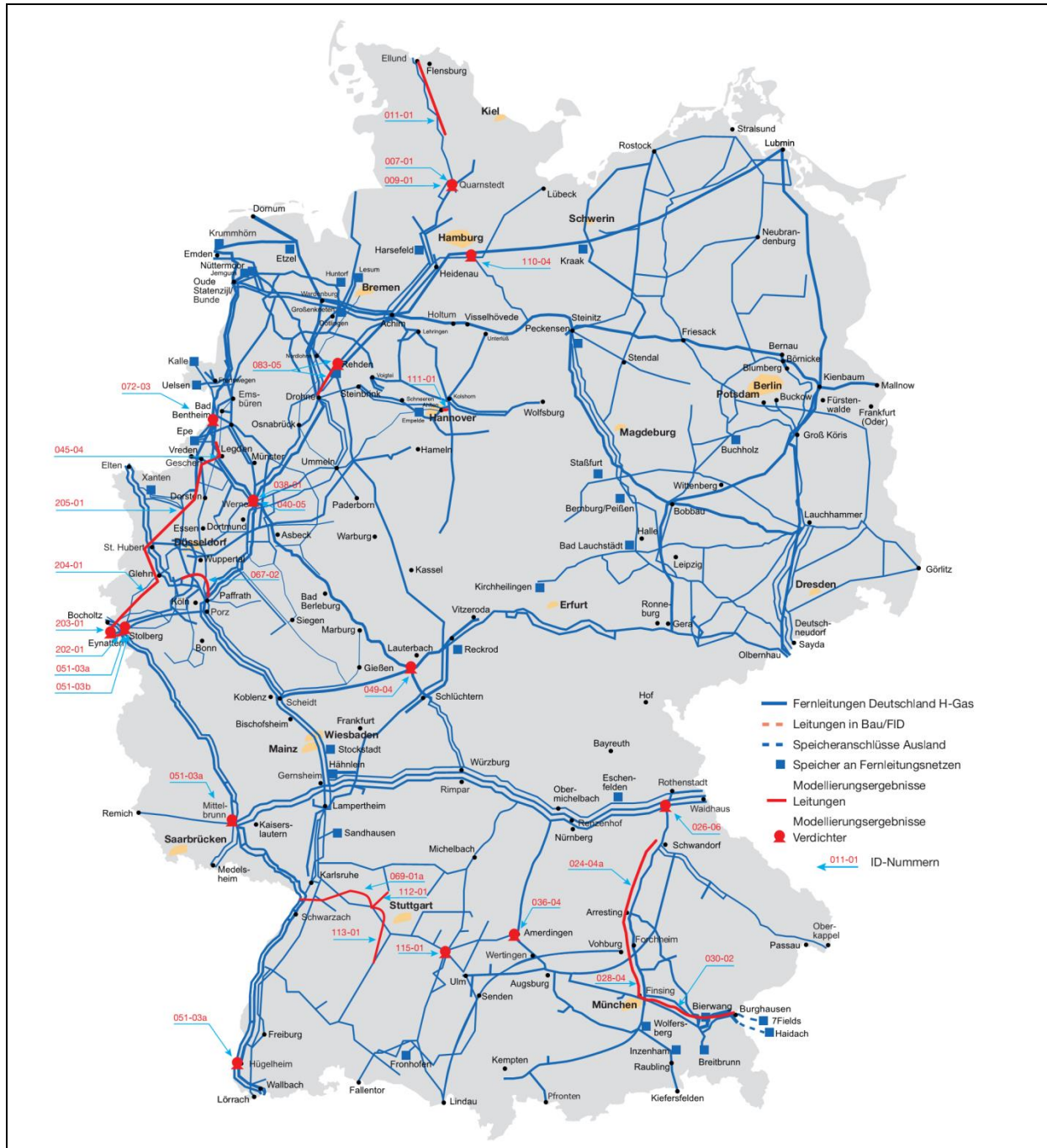
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Network upgrades proposed by TSOs for NDP 2014



Source: TSOs

German high cv gas transmission systems
Pipelines under constructions/FID
Storage connections (foreign)
Storages connected to transmission systems
Modelling results
Pipelines
Modelling results
Compressors
ID nos.