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INES publishes November update on gas scenarios

Gas storage facilities in Germany have been completely filled for the second year in a row. Only extremely cold temperatures could lead to a gas shortage under the current conditions in Germany, according to the November update on gas scenarios presented today by the Initiative Energien Speichern e.V. (INES).

The Initiative Energien Speichern e.V. (INES) presented the November update on the gas scenarios at a press conference today. The gas storage facilities in Germany have now been completely filled. The filling level of 95 percent required by law on November 1 has therefore been exceeded and the injection phase has been successfully completed.

If temperatures continue to fall in November, the withdrawal phase could already begin this month. If medium to extremely cold temperatures occur in winter, the gas storage facilities will be emptied extensively or completely. In these cases, it can be challenging to meet the statutory filling level requirement of 40 percent by February 1. Under the current conditions, however, a gas shortage is only to be feared in extremely cold temperatures.

The statutory filling level requirements were introduced with the so-called Gas Storage Act (Part 3a of the Energiewirtschaftsgesetz, EnWG) and are limited until April 1, 2025. On October 13, 2023, the Federal Government submitted a proposal to the Federal Council to amend the Gas Storage Act. The proposed amendments essentially comprise the following points:

- Extension of the Gas Storage Act until March 30, 2027
- Certification obligation for gas storage operators
- Introduction of fines for gas storage operators
- Introduction of the obligation for gas storage operators to monitor user-specific filling levels
- Introduction of a withdrawal ban for storage facility users who fall below the statutory fill level requirements (from April 1, 2024)

According to INES assessment, the German government's proposals to amend the Gas Storage Act do not have the potential to further improve security of supply. The proposed withdrawal ban could even have a negative impact on the market-based use of storage facilities and therefore on the security of gas supply. Instead, further developed gas options or filling instruments could contribute to securing the filling level requirements. Against the background of completely filled gas storage facilities, the proposals for the further development of the Gas Storage Act should be reconsidered.

As part of the presentation of the November update for the gas scenarios, INES Managing Director Sebastian Heinermann (née Bleschke) commented on the current gas supply situation and the proposed amendments to the Gas Storage Act as follows: *"Despite all the challenges, the operators and users of the gas storage facilities have achieved a second consecutive year*

of complete filling of the gas storage facilities. For the upcoming winter, full filling means that only extremely cold temperatures under current conditions could lead to a gas shortage. I very much hope that this will not only gain the necessary trust from politicians, but also create the basis for refraining from further interventions in the use of storage facilities."

BACKGROUND TO THE INES GAS SCENARIOS:

The Initiative Energien Speichern e.V. (INES) continuously models the European gas markets in order to assess the security of gas supply. On this basis and taking into account the storage levels on November 1, 2023, three scenarios for the gas supply in Germany in winter 2023/24 were considered:

- In the first scenario, the temperatures of the EU weather year 2016 are used on a country-specific basis in order to consider normal temperatures.
- Another scenario assumes "warm temperatures" as in the European winter of 2020.
- A third scenario examines the gas supply for "cold temperatures" corresponding to the European winter of 2010.

The INES scenarios for gas supply in winter 2023/24 were published for the first time on April 19, 2023 based on data up to the end of March 2023. The November update is the fourth update of these scenarios. It takes into account the data situation up to the end of the previous month of October.

During the "summer phase" (May to October 2023), INES only publishes updates to the INES gas scenarios every two months. In winter, the updates will be monthly. The next update is therefore planned for December 14, 2023. As a special topic, it will take a closer look at the Federal Network Agency's crisis management concept.

A detailed explanation of the scenarios and results can be found in the presentation slides for the press conference and in the presentation documentation. In addition, all press conferences on the gas scenarios were recorded and can be viewed on the [INES YouTube channel](#).

Current information on gas storage levels in Germany and in the individual federal states can be found at any time via the [INES storage map](#). In addition, storage data can be filtered not only according to different storage types (cavern and pore storage) but also according to gas quality (L/H gas and hydrogen).

ABOUT US:

INES is the association of gas and hydrogen storage system operators in Germany. INES' members represent over 90 per cent of German gas storage capacities and account for about 25 per cent of gas storage capacities in the European Union. INES' member companies also push the development of underground hydrogen storage in numerous projects and thereby form pioneers in this important technology field for the energy transition.

The members of INES are astora GmbH, bayernugs GmbH, Enovos Storage GmbH, Erdgasspeicher Peissen GmbH, Etzel-Kavernenbetriebsgesellschaft mbH & Co. KG, EWE Gasspeicher GmbH, HanseWerk AG, OMV Gas Storage Germany GmbH, RWE Gas Storage West,

NAFTA Speicher GmbH & Co. KG, STORAG Etzel GmbH, Storengy Deutschland GmbH, Trianel Gasspeicher Epe GmbH & Co. KG, Uniper Energy Storage GmbH and VNG Gasspeicher GmbH..

PRESS CONTACT:

Sebastian Heinermann (néé Bleschke)
Managing Director
Initiative Energien Speichern e.V.
Glockenturmstraße 18
14053 Berlin

Tel: +49 30 36418-086
Fax: +49 30 36418-255
info@energien-speichern.de
www.energien-speichern.de