

An aerial photograph of a gas pipeline installation site. A large yellow pipeline runs diagonally across the frame. Two workers in orange safety vests and white hard hats are standing on a metal walkway next to the pipeline. The ground is a mix of gravel and concrete. A green plus sign icon is located near the center of the image, overlapping the pipeline and the text box.

## The role of TSOs for a competitive gas market

N.PEUGNIEZ – GRTgaz (France)

Asia Gas Partnership initiative Webinar - March 18th, 2021

# GRTgaz Introduction and key figures

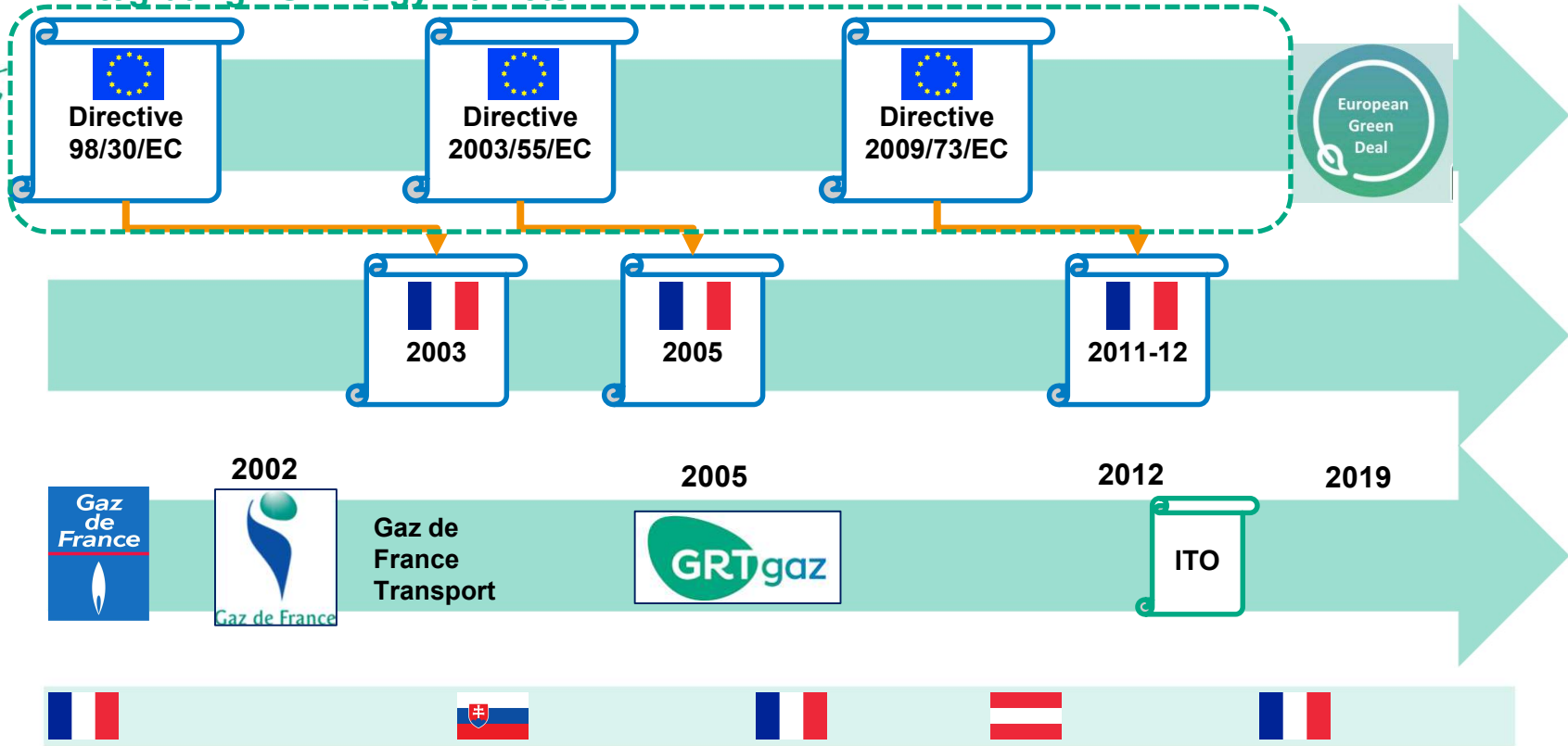


- Transport network (France)
- Transport network (Germany)
- Interconnections with adjacent networks
- Interconnections with LNG terminals
- Compression stations (France)
- Compression stations (Germany)
- Direction of gas flow
- Adjacent transport operators and LNG terminals

- RICE** GRTgaz  
Research & Innovation Center for Energy
- ITO Certification**
- GRTgaz Deutschland**  
**elengy**
- GRTgaz**  
**Transport in France**  
3 014 employees  
32 548 km gas pipelines  
598 MW compression  
701 TWh transported
- KPI (2019)**  
1 886 M€ Turnover  
414 M€ Investment  
292 M€ Net profit
- Shareholders**  
74,6% **ENGIE**  
24,8% **Gazpar** & **CNP**  
0,6% **aito**
- 158 shippers**  
**733 industrial customers**  
**19 distribution system operators**

# Market opening in Europe: a long-term process

## Integrating EU Energy Markets







## When do you need an operator for the system in gas?

1. When scale effect is important and optimization counts - natural monopoly:

*Either developing greenfield or scaling-up local developments*

2. to ensure level playing field between producers/consumers with diverse market power

*Access to the infrastructure, possibility to influence infrastructure development, ... through transparent rules (network codes) and processes*

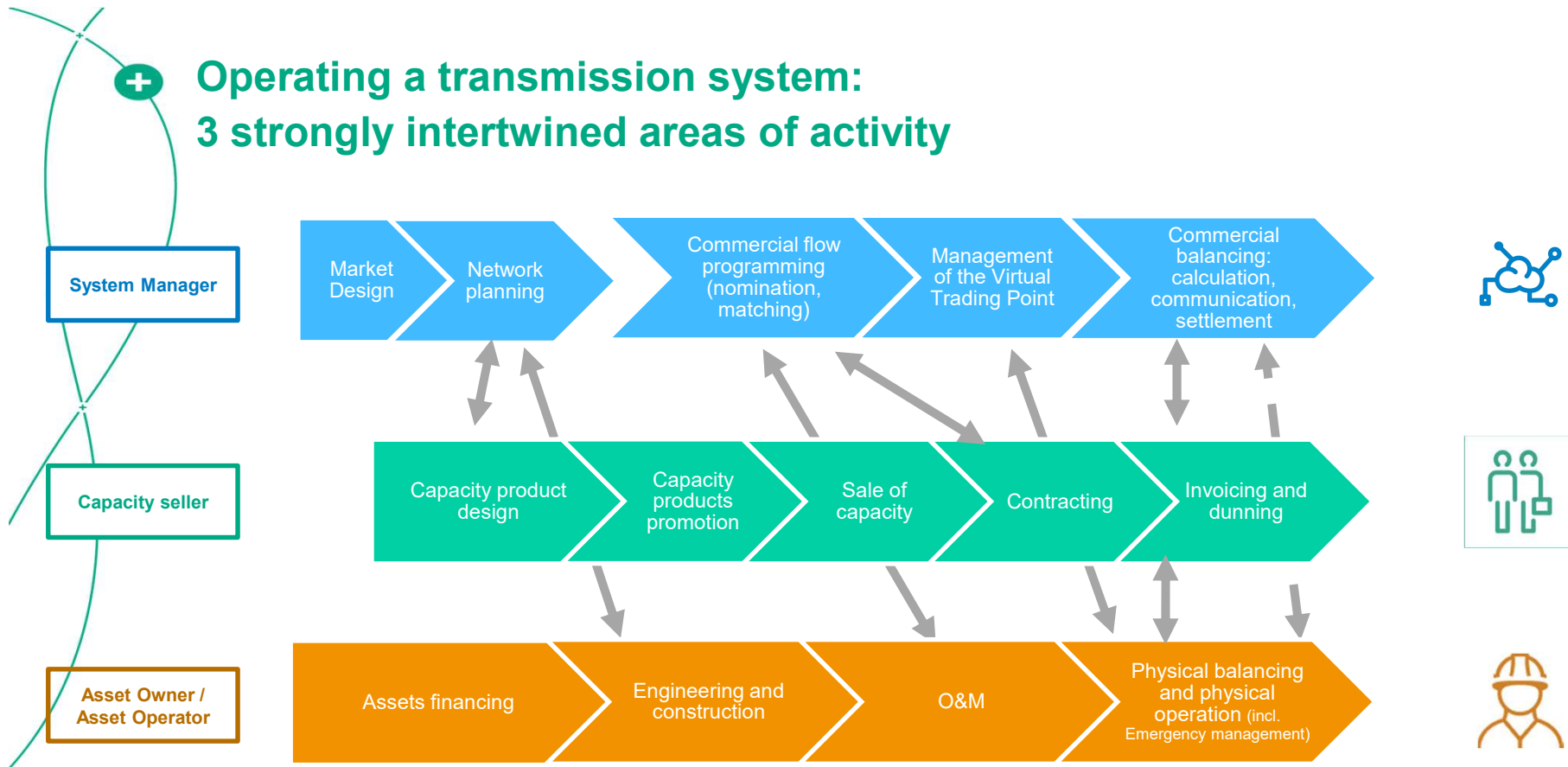
3. to address cases which the market cannot handle easily

*Security of Supply, Extreme events*

*Long Term view, complex system interactions, Energy Policies*



**+ Operating a transmission system:  
3 strongly intertwined areas of activity**



**Transparency on each activity is pivotal to ensure the confidence of market player in the non-discriminatory attitude of the TSO**

# + What role for TSOs in accompanying market opening? (1/2)

## Market design:

Simplifying, virtualizing, shaping the market  
 optimizing flows  
 Including between different operators



2005



2009



2015



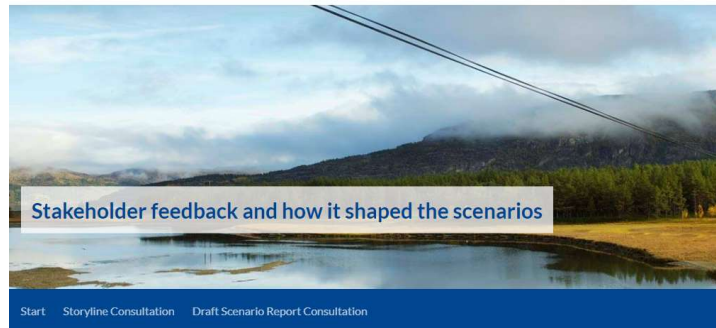
## Overview of network, planning and investing:

Stakeholders involvement in

- scenarios,
- capacity development (Open Season)
- Market merger solutions (TRF)



INTRODUCTION & HIGHLIGHTS   MAIN REPORT   BUILDING GUIDELINES   VISUALISATION PLATFORM



Start   Storyline Consultation   Draft Scenario Report Consultation



TEN-YEAR NETWORK DEVELOPMENT PLAN

2020

# + What role for TSOs in accompanying market opening? (2/2)

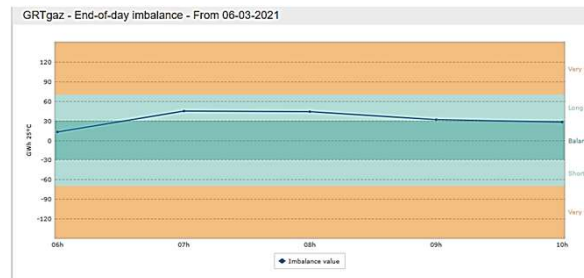
## Capacity allocation:

- Allocate capacities bundled across systems
- Facilitate a simple access to capacity with transparent rules



## Within day market animation:

- market balancing rules developed with the market

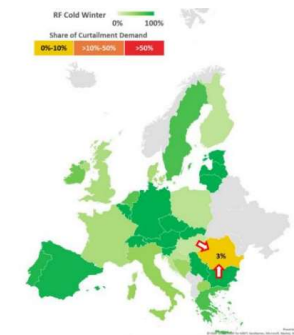


## Transparency and visibility to shippers:

- Summer outlook, winter outlook
- Maintenance, Urgent Market Messages

## Carry certain public interest activities:

- Storage obligation



# GRTgaz: a node of competences on regulated assets and gas

## A unique combination of know-hows



### Assets audit and management

- Pipelines
- Rotating machines



### Project management

- Gas assets
- IT



### Operations

- O&M
- IT and dispatching



### Regulation - Regulated market design and marketing

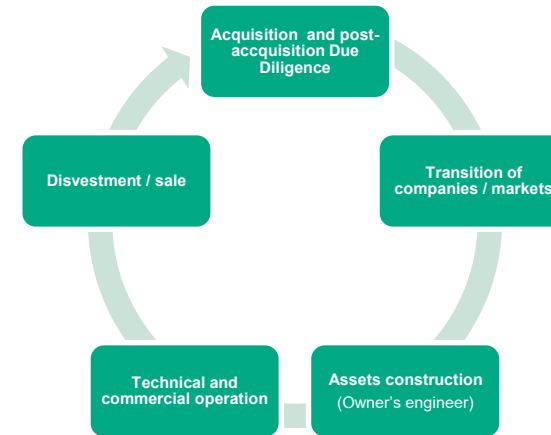
- Regulatory negotiation
- Regulated business marketing and sales
- Capacity sales and management, Virtual Trading Point operation



### R&D

- Assets optimisation (Transmission, Distribution, LNG): dimensioning, cathodic protection, safety, ...
- New gases (gas, biomethane, hydrogen – gas quality, processes)

## Relevant and implemented along the whole investment cycle



## Where did we deliver services?







Connecter les énergies d'avenir

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