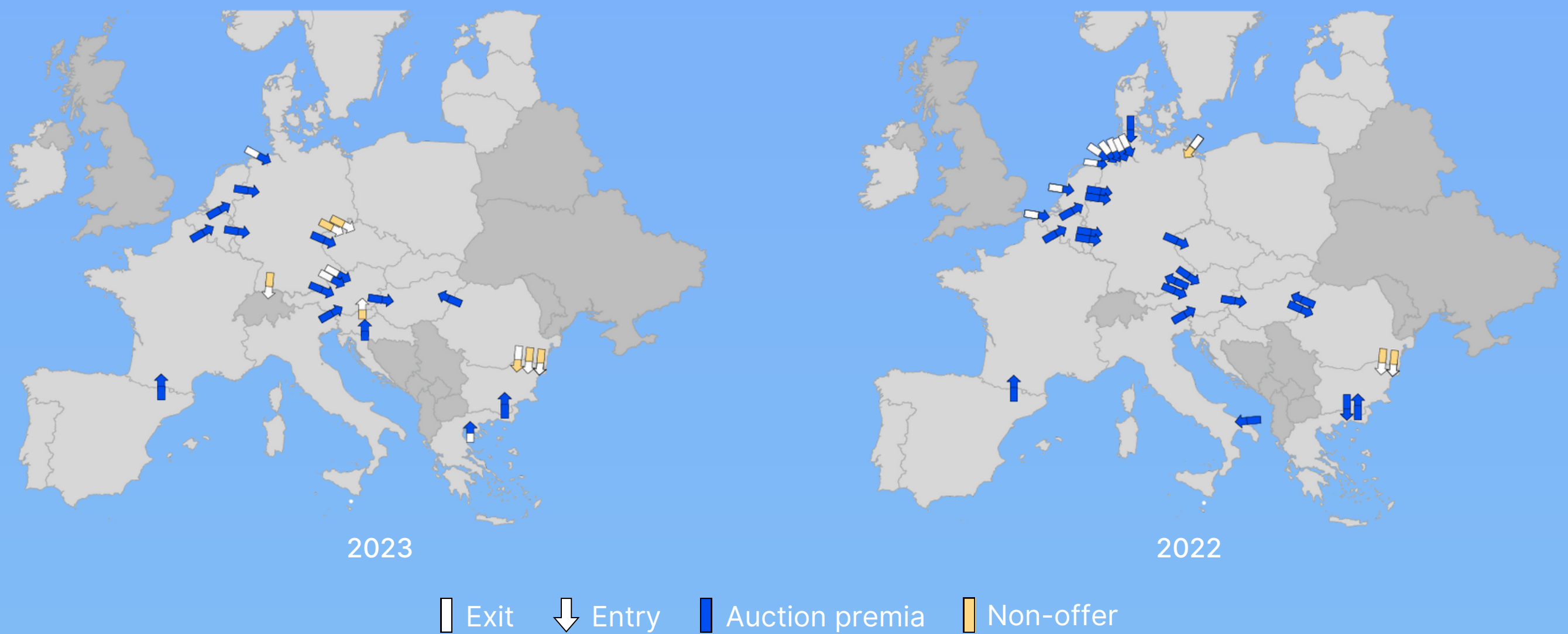


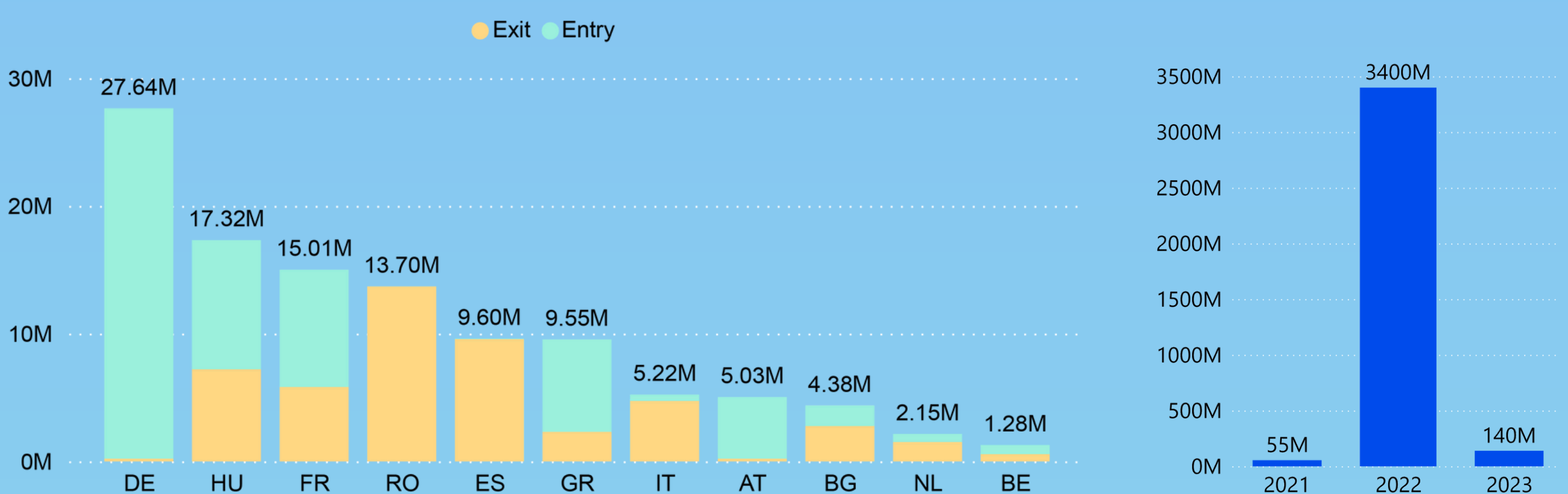
# Congestion in EU gas markets - have we reached a new normal?

Network congestion in EU gas markets diminished in 2023, but remains present on key west-east routes that were congested in 2022.



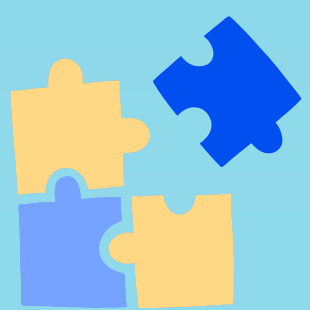
- 35 exit and entry sides at interconnection points (IPs) were congested in 2023, a decrease from 50 congested IPs in 2022.
- Physical congestion occurred at 7 contractually congested IP sides.
- New LNG import capacity boosted supply and helped remove congestion at entry points from Norway and the UK.

Congestion revenues recorded by TSOs in 2023 declined due to improved market conditions at the most acute bottlenecks and reduced hub spreads.



- €140 million of total congestion revenues were collected by Transmission System Operators (TSOs). A sharp decrease from €3.4 billion in 2022.
- The number of auctions closing with premia for yearly (39), quarterly (54) and monthly (62) capacity products decreased to 155.
- 'Oversubscription' remains the most applied congestion management procedure, followed by 'Surrender'.

## ACER RECOMMENDATIONS



Neighbouring TSOs should closely coordinate to jointly maximise the availability of firm and interruptible capacities.



Neighbouring National Regulatory Authorities (NRAs) should collaborate to remove any regulatory barriers that hinder the optimal use of the existing network for reconfigured supply routes.



TSOs shall assess whether new investments are needed to address physical bottlenecks that persist after operational optimisations.



NRAs needs to assess whether investments to eliminate structural bottlenecks align with the EU's energy and climate policies, and security of supply requirements.