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Germany: The unexpected development of competition

In the second of two articles looking at the German gas market, Gas Matters finds that a fundamental shift has slowly but surely occurred in the gas sector over the past three years. Pushed by a determined regulator – Bundesnetzagentur, established in visual_editor005 – a rigid market previously dominated by a few incumbents has evolved into a freely-traded, liquid, competitive playing field open to new entrants. The market has moved from 19 different traded areas in visual_editor006 to just two today, and the importance of long-term oil-linked contracts has diminished. While the market is still complex and consumers' switching rates between suppliers remain low, the progress made in recent years is encouraging, and has forced producers, midstream players and utilities to re-examine their business models.



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