

**Demand assessment report
for the incremental capacity process
starting 2019
between Trading Hub Europe and
Belgium (ZTP) where no non-binding
demand indications were received**

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This report is a joint assessment of the potential for incremental capacity projects conducted by

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A. Non-binding Demand indications

Future merger of the German entry-exit-systems

On 7 July 2017, the German Bundesrat (Federal Council) approved the revision of the German Grid Ordinance (GasNZV) which in §21 p. 1 s. 2 obliges transmission system operators (TSOs) to merge the currently existing two entry-exit-systems within Germany until 1 April 2022. Since such a merger implies that interconnection points between the entry-exit-systems will be transformed to inter-TSO exchange points and due to the fact that capacities eventually will not be bookable for transports, TSOs will stop marketing the respective capacities as of the date of the entry-into-force of the revised GasNZV for transports taking place after the merger.

In the course of the merging project of the two German market areas (“marco”) the German TSOs announced that they are planning to merge the two German market areas as of 1 October 2021. The name of the joint German market area will be Trading Hub Europe.

Since the ongoing incremental capacity process will end with the auctioning of yearly capacity products for capacity starting on 1 October 2021 in July 2021 there is no possibility to consider any requests concerning the borders of the market areas NetConnect Germany or GASPOOL.

Therefore, only demand indication for the borders of the merged German market area can be stated in the incremental cycle 2019 – 2021 (and following) and only those will be evaluated.

Received non-binding demand indications

In line with Art. 26 of Regulation (EU) 2017/459, the TSOs conducting this market demand assessment report gave network users the opportunity to submit non-binding demand indications to quantify potential demand for incremental capacity. The period for submission on both sides of the border between Germany (Trading Hub Europe) market area and Belgium (ZTP) was from 1 July to 26 August 2019 (COB).

Within this period no non-binding demand indications regarding the respective border were received by the TSOs. Non-binding demand indications received after the dead-line will be considered in the next market demand assessment report.

B. Demand assessment

i. Historical usage pattern

As stated above, for the incremental capacity cycle addressed by this report no non-binding market demand indications were received. Therefore, an analysis of the historical capacity utilization between the respective entry-exit systems to support the assessment of the demand for incremental capacity is not necessary.

ii. Relations to GRIPs, TYNDP, NDPs

None of the relevant GRIPs, TYNDP or NDPs identified a need for incremental capacity. This conclusion was further confirmed by the market not submitting any non-binding market demand indications.

iii. Expected amount, direction and duration of demand for incremental capacity

Bearing in mind the elements mentioned above, there is no demand for incremental capacity identified stemming either out of market indications or other sources.

C. Conclusion for the (non)-initiation of an incremental capacity project/process

Considering the elements mentioned in section A and B of this report, at this stage no ground is identified to consider starting an incremental capacity project. This does not preclude the conclusions of a following demand assessment exercise.

Hence, for the entry-exit-systems addressed by this report no incremental capacity project/process nor technical studies will be initiated based on this market demand assessment report.

D. Provisional timeline

For the time being no incremental project will be initiated. A next incremental process will start after the yearly capacity auction in 2021.

E. Interim arrangements for the auction of existing capacity on the concerned IP(s)

Due to the fact that no incremental project will be initiated based on this market demand assessment, interim arrangements are not required for the time being.

F. Fees

For the incremental capacity cycle addressed in this report, none of the involved TSOs introduced a fee for the evaluation and processing of non-binding demand indications.

G. Contact information

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