

Demand assessment report
for incremental capacity
between PEG and Trading Hub Europe

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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 7th July 2017, the German Bundesrat (Federal Council) approved the revision of the German Grid Ordinance (GasNZV) which in §21 p. 1 s. 2 obliges TSOs to merge the currently existing two entry-exit-systems within Germany until 1st 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 01 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 transmission systems operators 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 PEG and Trading Hub Europe was from 1 July to 26 August 2019 (COB).

No non-binding demand indications regarding the respective border were received by the TSOs until the publication date of the report.

B. Demand assessment

i. 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.

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

Since no non-binding demand indications were received by the respective TSOs, it is safe to assume that the availability of gas transmission capacity at the respective entry-exit system border is currently sufficient from network user point of view.

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 doesn't 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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