

**Demand assessment report  
for the incremental capacity process starting  
2017  
between *GASPOOL* and *TTF market area***

**2017-07-27**



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

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## A. Assessment for High-calorific Gas (H Gas)

### A.1. Non-binding Demand indications

All inquiries received in the course of the demand period comply with the terms and conditions of participation and can be taken into account in the subsequent analysis.

The following **aggregated non-binding demand indications** for firm capacity have been used as a basis for this demand assessment:

From “EXIT APACITY”	To “ENTRY CAPACITY”	Gas year	Amount kWh/h	Request is submitted to other TSOs	Period when De- mand Indi- cation was received*	Additional Information <sup>1</sup>
GASPOOL	Netherlands	2025/26	2,638,255	No	2	<b>GASPOOL exit:</b> Re- stricted allocable firm ca- pacity from the border Russian Federa- tion/GASPOOL <b>TTF Entry:</b> Firm capacity
GASPOOL	Netherlands	2026/27 - 2029/30	5,276,509	No	2	<b>GASPOOL exit:</b> Re- stricted allocable firm ca- pacity from the border Russian Federa- tion/GASPOOL <b>TTF Entry:</b> Firm capacity
GASPOOL	Netherlands	2030/31 - 2039/40	11,872,146	No	2	<b>GASPOOL exit:</b> Re- stricted allocable firm ca- pacity from the border Russian Federa- tion/GASPOOL <b>TTF Entry:</b> Firm capacity

<sup>1</sup> In the letter accompanying the inquiry from the shipper clarified that „Exit Bunde/Oude Statenzijl capacities in the amount of up to 11 872 MWh/h (circa 9 bcm/year (20°C)) starting from 2030 go beyond all the existing capacities at these exit points.” During further clarifications the shipper also specified, that the whole requested demand for the time period 2025/26-2039/40 to be considered as additional to the existing technical capacity. Therefore the non-binding demand indication for the purposes of this assessment consists of two parts: non-binding demand indication for incremental capacity, as identified in the table, and non-binding demand indication for existing capacity in the amount of difference between booked and available technical capacity on the GASPOOL-side of the border.

\* The following standardised period shall be used for indicating the receiving date of the demand indication:

- 1) later than eight weeks after the annual yearly capacity auction in the previous incremental capacity cycle, that have not been considered previously;
- 2) within eight weeks after this year's yearly capacity auction (0 – 8 weeks after yearly auction in year);
- 3) later than eight weeks after this year's yearly capacity auction, but that will be considered in this incremental capacity cycle (9 – 16 weeks after yearly auction in year).

## A.2. Demand assessment

### i. Historical usage pattern at interconnection points between GASPOOL and TTF market area

For the incremental capacity cycle addressed by this report non-binding market demand indications were received. Therefore an analysis of the historical capacity utilization between the aforementioned entry-exit systems is given to support the assessment of a future demand for incremental capacity.

To support the assessment of incremental capacity request, received on the level of entry-exit system, and according to the requirements of the Commission Regulation (EU) 2017/459 (NC CAM) the analysis is performed on the aggregated level. The analysis is performed for the applicable direction, for which non-binding demand indications were received. The analysis is also performed separately for each side of the border, as technical and commercial parameters can differ significantly for a number of reasons.

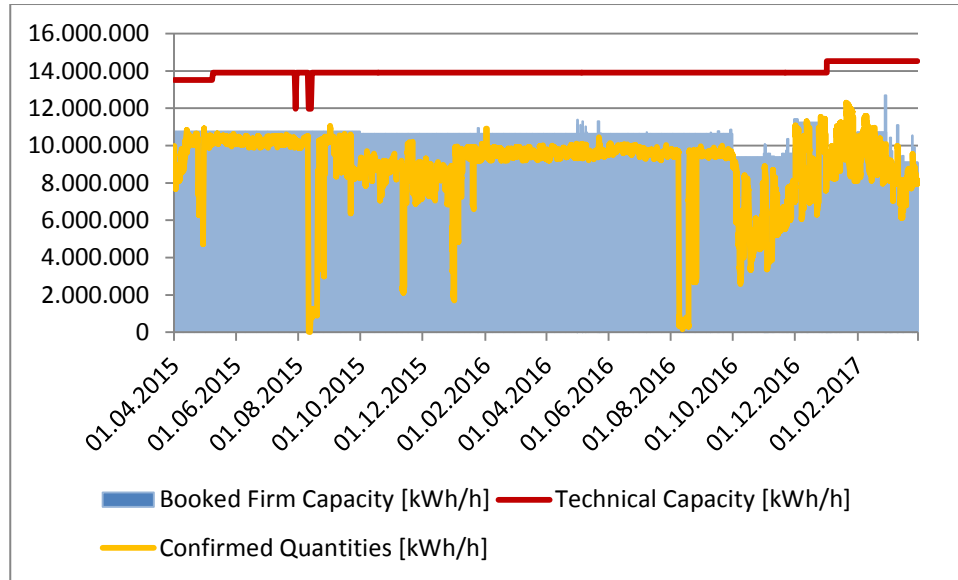
For the analysis the technical capacity, the booked firm capacity and the final confirmed quantities is presented on an hourly scale. For the confirmed quantities no distinction between transports in firm or interruptible capacities is performed. The analysis is performed for the time frame 01.04.2015 06:00 hr. – 01.04.2017 06:00 hr.

Interconnection Points connecting the aforementioned entry-exit system:

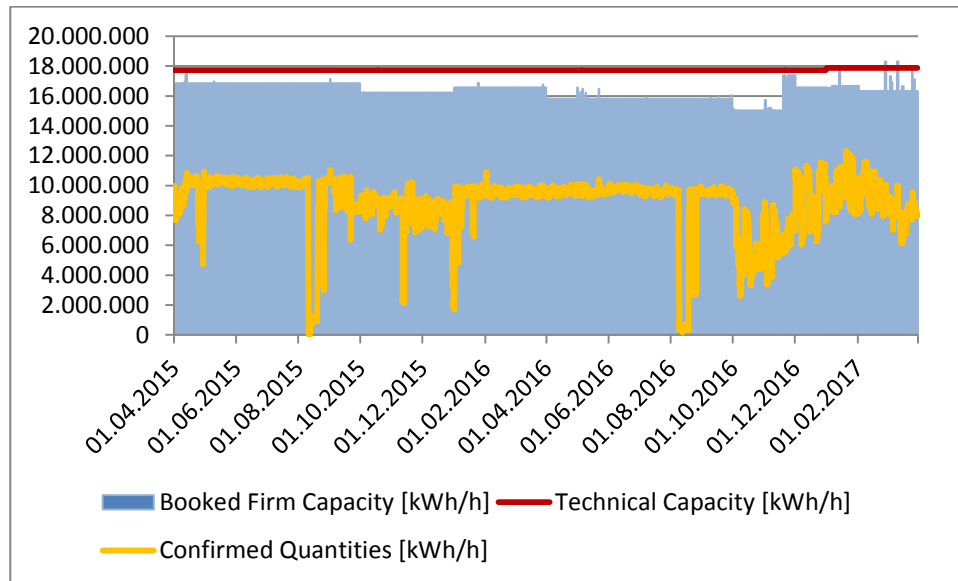
Interconnection Point:	<b>Oude Statenzijl H</b>		
Energy Identification Code:	<b>21Z000000000076M</b>		
Entry-exit-system:	<b>GASPOOL</b>	Entry-exit-system	<b>TTF market area</b>
Pipe-in-Pipe:	No	Pipe-in-Pipe:	No
Transmission System Operator:	IP name	Transmission System Operator:	IP name
GUD	Oude Statenzijl H	GTS	Oude Statenzijl (GUD-H)[OBEH]

Interconnection Point:	<b>Bunde/Oude Statenzijl-H</b>		
Energy Identification Code:	<b>21Z000000000074Q</b>		
Entry-exit-system:	<b>GASPOOL</b>	Entry-exit-system	<b>TTF market area</b>
Pipe-in-Pipe:	No	Pipe-in-Pipe:	No
Transmission System Operator:	IP name	Transmission System Operator:	IP name
Gascade	Bunde	GTS	Oude Statenzijl (GAS-CADE-H)

**a. Exit GASPOOL**



**b. Entry TTF market area**



## **ii. Relations to GRIPs, TYNDP, NDPs**

### ***NDP Germany***

The last national development plan for Germany is the Netzentwicklungsplan Gas 2016-2026 (NEP Gas 2016), which has been published for consultation in April 2016 (with a revision in April 2017). The German national development plan (NEP) is a legally binding NDP. The NEP Gas 2016-2026 has not yet been confirmed by the German NRA (Bundesnetzagentur) due to the necessary revision of the full NEP process including the final results. The legally valid NEP for Germany is therefore still the NEP Gas 2015. The analysis in respect to the future technical projects is however performed based on the latest knowledge from the NEP Gas 2016-2026.

In the planning of the NEP Gas 2016-2026 no projects were considered for the expansion of capacities from GASPOOL to the TTF. The NEP Gas 2016-2026 was not based on the results of the More Capacity market survey, since at the time of setting up the scenario for the NEP Gas 2016-2026 only non-binding market demand indications were available.

### ***NDP Netherlands***

The most recent Dutch network development plan (NOP) will be published for public consultation in July 2017. In this plan a project for supporting additional import to the Netherlands at Oude Statenzijl is identified. Transport of the additional gas from GASPOOL to the TTF market area requires a reinforcement of the GTS transport network. The information of the NOP consultation version for the expansion of capacities to the TTF market area will be considered in further analyses for the received demand indications.

### ***Gas Regional Investment Plan 2017 (GRIP North West 2017), Ten-years Network Development Plan 2017 (TYNDP 2017)***

The current Europe wide grid development plans covering the interconnection points between GASPOOL and the TTF are the GRIP NW 2017 and the TYNDP 2017 published in April 2017. The GRIP NW 2017 and the TYNDP 2017 include projects for the expansion of the capacities from GASPOOL to the TTF in the High infrastructure level (less-advanced non-FID projects) based on the demand indicated by the market in the More Capacity market survey. These are the projects Expansion NEL [TRA-N-807], Transport of gas volumes to the Netherlands [TRA-N-808], Capacity expansion OSZ related to West Stream [TRA-N-873], and Additional East-West transport NL [TRA-N-809]. The result of the projects would be an increase of the technical capacity from GASPOOL to the TTF by about 9.3 GW starting in 2022.



It has to be taken into account, that TYNDP is a non-binding document whereas NEP in Germany is legally binding. Thus, as stated above, the analysis in respect to the future technical projects on the GASPOOL side of the border is based on the NEP Gas 2016-2026. Since the latest NEP Gas 2016-2026 does not contain any projects affecting technical capacity from GASPOOL to TTF, the requested incremental capacity is analyzed based on the existing technical capacity, taking into account demand driven reallocations and adjustments of the technical capacity, as published on the ENTSOG Transparency Platform.

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

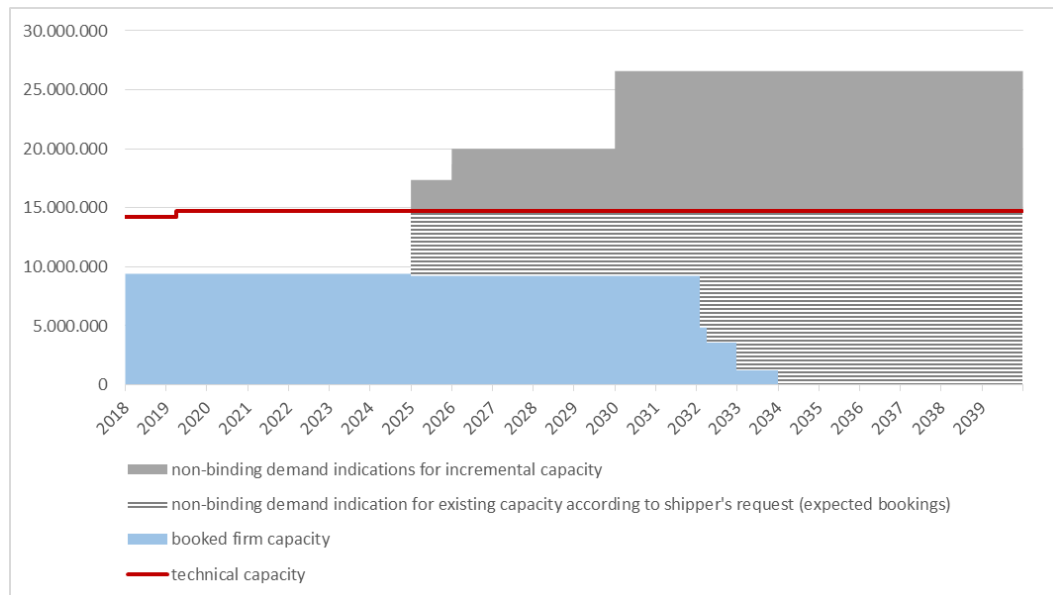
The assessment of the demand for incremental capacity is conducted by analyzing the technical capacity, the booked firm capacity and the non-binding demand indications (for existing and incremental capacity) received for the relevant entry-exit system borders. As the non-binding demand indications were only received for entry-exit-systems borders and not for specific IPs the technical capacity as well as the booked firm capacity for every IP of every TSO connecting the relevant entry-exit systems are combined to one total technical capacity and one total booked firm capacity which are valid for the market area border. The sum of the total booked firm capacity and the non-binding demand indication for one entry-exit system border is then compared with the existing technical capacity. This analysis is performed for the relevant entry-exit system border and for the applicable direction for which non-binding demand indications were received.

On the GASPOOL side: since only dynamical allocable capacity (DAC) was requested in this inquiry the entire technical capacity which can be marketed and all booked capacities are considered in the following analysis.

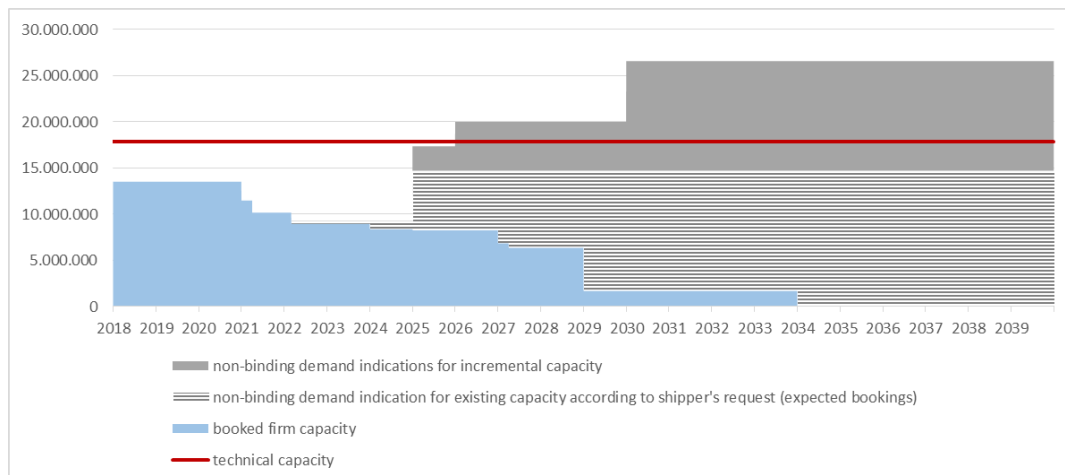
On the TTF market area side: since only firm capacity was requested in this inquiry only the technical capacity which can be marketed as firm capacity and the booked firm capacities are considered in the following analysis.

The following charts will show the total technical capacity and the total booked firm capacity on each side of the market area border for the analyzed period.

### a. Exit GASPOOL



### b. Entry TTF market area



### A.3. Conclusion for the (non)-initiation of an incremental capacity project/process

If a sustained expected demand for incremental capacity is identified on one side of the entry-exit-system border the involved TSOs deem it necessary to conduct technical studies and to go further with the next phase of the combined incremental capacity project. Deviations can occur only if there are justified individual instances.

For the entry-exit-systems addressed by this report the following conclusion for the (non)-initiation of an incremental capacity project/process is drawn:

- a. ***For the GASPOOL side of the border the above shown chart clearly indicates that the sum of both booked capacity and demanded incremental capacity are higher than the technical capacity available at the market area border.***
- b. ***For the TTF market area side of the border the above shown chart clearly indicates that the sum of both booked capacity and demanded incremental capacity are higher than the technical capacity available at the market area border.***

Therefore all involved TSOs deem it necessary to conduct a technical study for the concerned IPs in a close cooperation. The involved TSOs will go further with the next phase (Design phase) of the combined incremental capacity project according to Art. 27 of NC CAM.

For this incremental capacity project the technical studies will be conducted for potentially all IPs of the entry-exit system border for which the project was initiated. The specific IPs and TSOs for which technical studies will be conducted will be determined in the Design phase according to Art. 27 of NC CAM. Thereby economical aspects and aspects of grid topology will be taken into account.

The Federal Council of Germany accepted the new amendment to the German Network Access Regulation (GasNZV) in its meeting on 07.07. 2017. Art. 21 Para. 1 (2) of the amended regulation obliges German TSOs to merge the two existing entry-exit zones (GASPOOL and Net Connect Germany) into one single entry-exit zone until 01.04.2022. The amended regulation is expected to enter into force in the upcoming months. Thus, the new rules and consequences will be analyzed and considered as far as possible in the next phases of this incremental process. For this purpose, it may be necessary to include other TSOs, which have not yet been involved in the preparation of this document. Due to the merging of the market areas, it is not ensured that the given technical capacity used in this Market Demand Assessment Report will be available from 01.04.2022 onwards.

### A.4. Provisional timeline

The involved TSOs have planned to conduct the technical studies and the consultation of the draft project proposal according to the following provisional timeline:

Start Date	End Date	Description
27.7.2017		Start of design phase
27.7.2017	19.10.2017	Technical studies by TSOs
19.10.2017		Publication of consultation documents
19.10.2017	19.12.2017	Public consultation

The technical studies and the necessary modelling amongst the German TSOs will be performed independently from the development process and the modelling of the German national development plan 'NEP 2018'.

The outcome of the technical studies and the result of the public consultation of the draft incremental projects will feed into the planning of the offer levels by the TSOs in close cooperation with the involved national regulatory authorities. The following process can be described as follows:

Start Date	End Date	Description
19.12.2017	19.3.2018 – 1.9.2018	Planning of offer levels by TSOs in close cooperation with NRAs
19.3.2018 – 1.9.2018	19.9.2018 – 1.3.2019	Approval and publication of the necessary parameters acc. to Art. 28 Para 1 NC CAM by NRAs
19.9.2018 – 1.3.2019	1.5.2019	Adjustment of the offer levels according to NRA decision by the TSOs
1.5.2019		Publication of the approved parameters and of a template of the contract(s) related to the capacity to be offered for the incremental project
1.7.2019		Yearly auction/economic test

The stated dates have provisional character and are therefore subject to change.

If the economic test was positive on a GASPOOL side, the project will feed into the national development process for the national development plan 'NEP 2020' and will be considered in its scenario framework and the (national) modelling.

#### **A.5. Interim arrangements for the auction of existing capacity on the concerned IP(s)**

According to Art. 26 Para 13 (j) of NC CAM, the involved transmission system operators will offer capacities in compliance with Art. 11 Para 3 of NC CAM. The total duration of the non-binding demand indications with relevance for this Demand Assessment Report spans from gas year 2025/26 to gas year 2039/40, thus matching the threshold value stipulated in abovementioned Articles. Therefore no legal obstacles to offering all potential incremental capacities resulting from discussed non-binding demand indications in the yearly auction of 2019 were identified. At the moment the involved transmission system operators are investigating how to apply Art. 11 Para 3 of NC CAM with regards to limitation of the number of years being offered in the yearly auction of 2018.

#### **A.6. Fees**

According to Art. 26 Para 11 of NC CAM transmission system operators may charge fees for activities which result from the transmission of non-binding demand indications. Whether to demand fees or not will be evaluated by the transmission system operators for every single incremental capacity cycle. The decision on this matter for one specific incremental capacity cycle is without prejudice for any following cycles

For the incremental capacity cycle addressed by this report, neither on the Dutch nor on the GASPOOL-H side of the borders between the two respective entry-exit-systems fees applied to the submission of non-binding demand indications.

## A.7. Contact information

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## **B. Assessment for Low-calorific Gas (L Gas)**

### **B.1. Non-binding Demand indications**

In line with Art. 26 of NC CAM, 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 entry-exit system border between the TTF market area and GASPOOL-L was 6<sup>th</sup> April to 1<sup>st</sup> June 2017.

Within this period no non-binding demand indications regarding the respective border were received by the TSOs. Non-binding demand indications received after the deadline will be considered in the next market demand assessment report. Therefore, the amount of 0 for non-binding demand indications has been used as a basis for this demand assessment.

### **B.2. Demand assessment**

#### **i. Historical usage pattern at interconnection points between the TTF market area and GASPOOL-L**

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**

Since no non-binding demand indication were received by the respective TSOs, the relations to GRIPS, TYNDP and NDPs are not considered further.

#### **iii. 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 users point of view.

### **B.3. Conclusion for the (non)-initiation of an incremental capacity project/process**

Given that no demand for incremental capacity is identified on either side of both entry-exit-systems, no technical studies will be conducted by involved TSOs. Hence, for the entry-exit-systems addressed by this report no incremental capacity project/process will be initiated based on this market demand assessment report.

### **B.4. Provisional timeline**

For the time being no incremental project will be initiated. The next incremental process will start after the yearly capacity auction in 2019.

### **B.5. 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.

### **B.6. Fees**

According to Art. 26 Para 11 of NC CAM transmission system operators may charge fees for activities which result from the transmission of non-binding demand indications. Whether to demand fees or not will be evaluated by the transmission system operators for every single incremental capacity cycle. The decision on this matter for one specific incremental capacity cycle is without prejudice for any following cycles.

For the incremental capacity cycle addressed by this report, neither on the Dutch nor on the GASPOOL-L side of the borders between the two respective entry-exit-systems fees applied to the submission of non-binding demand indications.



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