

**Demand assessment report
for the incremental capacity process
starting 2019
between Norway and the German
market area 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 by¹

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¹ Gassco AS, the operator of the Norwegian upstream pipeline system is not obliged to follow the implementation of Regulation (EU) 2017/459. Gassco AS stated, that they will not participate in this Incremental Capacity process.

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A. 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 “adjacent market area” and the German market area 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 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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