

**Demand assessment report
for the incremental capacity process starting 2017
between *GASPOOL* and Net Connect Germany**

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

GASCADE Gastransport GmbH

Kölnische Str. 108-112
34119 Kassel
Germany

T.: +49 (0) 561 934-0
kontakt@gascade.de
Fax: +49 (0)561 934-1208



Gasunie Deutschland GmbH

Pelikanplatz 5
30177 Hannover
Germany

T.: +49 (0) 511 640 607-0
webinfo@gasunie.de
Fax: +49 (0)511 640 607 1001



GRTgaz Deutschland GmbH

Zimmerstraße 56
10117 Berlin
Germany

T.: +49 (0)30 7261904-900
new-capacity@grtgaz-deutschland.de
Fax: +49 (0)30 7261904-999



Fluxys Deutschland

Elisabethstraße 11
40217 Düsseldorf
Germany

T.: +49 (0)211 230945-01
info.fluxysnel@fluxys.com
Fax: +49 (0)211 230945-09



jordgasTransport GmbH

Promenade Am Alten
Binnenhafen 6
26721 Emden

T.: +49 (0)4921 99388-0
info@jordgastransport.de
Fax: +49 4921 99388-20



Nowega GmbH

Anton-Bruchausen-Straße 4
48147 Münster
Germany

T.: +49 (0)251 60998-0
info@nowega.de
Fax: +49 (0)251 60998-999



ONTRAS Gastransport GmbH

Maximilianallee 4
04129 Leipzig
Germany

T.: +49 (0)341 27111-0
capacity@ontras.com
Fax: +49 (0)341 27111-2004



Open Grid Europe GmbH

Kallenbergstraße 5
45141 Essen
Germany

T.: +49 (0)201 3642 0
gastransport@open-grid-europe.com



terranets** bw GmbH**

Am Wallgraben 135
70565 Stuttgart
Germany

T.: +49 (711) 7812-0
Incremental@terrane**ts**-bw.de
Fax: +49 (711) 7812-1296



Thyssengas** GmbH**

Emil-Moog-Platz 13
44137 Dortmund
Germany

T.: +49 (0)231 91291-0
incremental_capacity@thyssen**gas**.com



OPAL Gastransport GmbH

Emmerichstraße 11
34119 Kassel
Germany

Tel.: +49 (0) 561 934-0
kontakt@opal-gastransport.de
Fax: +49 (0)561 934-2383



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A. 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 [entry-exit system name] “EXIT CAPACITY”	To [entry-exit system name] “ENTRY CAPACITY”	Gas year [yyyy/yy]	Amount [Please indicate unit: (kWh/h)/y or (kWh/d)/y]	Request is submitted to other TSOs [yes, TSO] or [no] (detailed information shall be provided below)	Period when Demand Indication was received* [please include the period according to the numbers 1) - 3)]	Additional Information (e.g. type of capacity, if different from bundled firm freely allocable)
GASPOOL	<i>Net Connect Germany</i>	2019/20 – 2023/24	200.000 kWh/h	No	2	<i>Requested capacity types: Exit GASPOOL: restrictedly allocable capacity (Entry allocation restrictions: Russian Federation or Speicher Rehden); Entry Net Connect Germany: freely allocable capacity</i>
GASPOOL	<i>Net Connect Germany</i>	2025/26 – 2039/40	7.793.333 kWh/h	No	2	<i>Requested capacity types: Exit GASPOOL: restrictedly allocable capacity (Entry allocation restrictions: Russian Federation); Entry Net Connect Germany: freely allocable capacity¹</i>

¹ In the letter accompanying the inquiry form the shipper clarified that "Exit Dronne capacities in the amount of 7 793 MWh/h (circa 5,9 bcm/year (20°C) go beyond all the capacities which have already been planned for construction and which will be booked by GPE in the amount of 7 200 MWh/h."

* 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).

The following table shows the **non-binding demand indications**, where a **condition** was attached by the network users:

From [entry-exit system name] “EXIT CAPACITY”	To [entry-exit system name] “ENTRY CAPACITY”	Gas year [yyyy/yy]	Amount [Please indicate unit: (kWh/h)/y or (kWh/d)/y]	Request is submitted to other TSOs [yes, TSO] or [no] (detailed information shall be provided below)	Conditions** [please include the letter(s) a) to c) and describe the conditions in more detail below]	Period when Demand Indication was received* [please include the period according to the numbers 1) - 3)]	Additional Information (e.g. type of capacity, if different from bundled firm freely allocable)
GASPOOL	<i>Net Connect Germany</i>	<i>2019/20 – 2023/24</i>	<i>200.000 kWh/h</i>	<i>No</i>	<i>d)</i>	<i>2</i>	<i>Requested capacity types: Exit GASPOOL: restrictedly allocable capacity (Entry allocation restrictions: Russian Federation or Speicher Rehden); Entry Net Connect Germany: freely allocable capacity</i>

* 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).

** The following standardised terminology shall be used for describing the conditions:

- a) commitments linking or excluding commitments at other interconnection points;
- b) commitments across a number of different yearly standard capacity products at an interconnection point;
- c) commitments conditional on the allocation of a specific or minimum amount of capacity;
- d) other.

Elaboration of conditions

The network user stated that:

- he is aware, that in the GASPOOL entry-exit system firm capacity is available in a sufficient amount at Drohne Exit. Therefore the non-binding request is basically only for capacity at Drohne Entry within the Net Connect Germany entry-exit system and
 - in case the entry-exit systems GASPOOL and Net Connect Germany merge in 2022 or earlier the request shall be shortened correspondingly.
-

B. Demand assessment

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-system within Germany until 1st April 2022. Since such a merger implies that interconnection points between the entry-exit-system will be transformed to inter-TSO ex-change 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. Accordingly, TSOs will discontinue the respective incremental capacity process because incremental capacities regarding the period after the merger cannot be offered at those interconnection points.

Therefore only demand indications until 04/2022 are considered in this market demand assessment report. The received demand indication in the amount of 7,793,333 kWh/h from October 2025 to October 2040 for freely allocable capacity at Entry Net Connect Germany and restrictedly allocable capacity at Exit GASPOOL will be evaluated within the market demand assessment report for the border between the entry-exit-systems GASPOOL and the Russian Federation due to the stated conditions of the demand indication.

Consideration of low calorific gas (L-Gas) and high-calorific gas (H-Gas)

The L-Gas production in Germany is declining and the Dutch transmission system operator GTS also announced a decline of L-Gas export capacity from the Netherlands to Germany from October 2020 on. To satisfy the existing gas demand the German L-Gas grid will have to be converted to H-Gas in the coming years. The two non-binding-demand indications addressed by this report both refer to a transport in GASPOOL's and NCG's H-Gas grids. This demand can in principle be satisfied with current or future interconnection points between the H-Gas grids and also with current interconnection points between GASPOOL's and NCG's L-Gas grids which will be converted to H-Gas during the duration of the non-binding demand indication. As this report will illustrate in Section B iii), the available capacity at existing interconnection points between H-Gas grids already suffices to satisfy the expressed non-binding demand indication. For this reason the interconnection points currently connecting GASPOOL's and NCG's L-Gas grids are not included within the historical usage pattern and are not included in Section B iii) as the conclusion of this report – whether to initiate an incremental capacity project or not – can be drawn without this analysis.

Specifics of the assessed demand indication

This non-binding demand indication requests firm freely allocable capacity at Entry Net Connect Germany and firm restrictedly allocable capacity at Exit GASPOOL. Within the request the restrictedly allocable Entry capacity connected with the restrictedly allocable Exit capacity was requested for the market area border of the Russian Federation or connection point to the storage facility Rehden. The only interconnection points within the GASPOOL market area currently satisfying both conditions on both sides of the border (and on which capacity is available on both sides of the border) are the interconnection points Drohne NOWAL and Emsbüren-Berge. For this reason, the assessment of the demand for incremental capacity is not only performed on an aggregated basis for all interconnection points on both sides of the entry-exit-system border, but also performed separately for these interconnection points.

i. Historical usage pattern at interconnection points between GASPOOL and Net Connect Germany

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.

This analysis is performed separately for each of the following interconnection points which connect the aforementioned entry-exits systems and for each direction, for which non-binding demand indications were received, in the current report the direction from GASPOOL (Exit) to Net Connect Germany (Entry). To support the assessment of incremental capacity demand the interconnection point specific analysis is aggregated to entry-exit-system level by the addition of the respective parameters of the single interconnection points. 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 according to Article 3 (8) of Regulation (EU) Nr. 312/2014 is presented on an hourly scale. For the confirmed quantities no distinction between transports in firm or interruptible capacities is performed. Only firm freely allocable capacity, load-dependent firm freely allocable capacity and firm restrictedly allocable capacity which complies with the stated demand-indication is included in the analysis to provide fitting reference for

the assessment of the demand for incremental capacity.² The analysis is performed for the time frame 01.04.2015 06:00 hrs – 01.04.2017 06:00 hrs.

The following interconnection Points connect the aforementioned entry-exit system and are suitable to fulfill the demand indications including the additional requirements:

Interconnection Point:	Achim II		
Energy Identification Code:	37Z0000000070550		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Fluxys Deutschland	Achim II	Open Grid Europe	Achim II

Interconnection Point:	Bunder Tief		
Energy Identification Code:	37Z000000006390S		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gasunie Deutschland	Bunder-Tief	Open Grid Europe	

Interconnection Point:	Broichweiden Süd		
Energy Identification Code:	37Z000000004913W		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:

² For Gernsheim both firm freely allocable capacity and firm restrictedly allocable capacity capacity not complying with the stated demand indication were offered and are included in the analysis as the confirmed quantities cannot be segregated between both capacity types (approximately 500.000 kWh/h).

Gascade	Broichweiden Süd	Thyssengas	Broichweiden Süd
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Interconnection Point:	Drohne NOWAL		
Energy Identification Code:	21Z0000000004774		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Ger-many
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gasgade	Drohne NOWAL	Open Grid Europe	Drohne NOWAL

Interconnection Point:	Emsbüren-Berge		
Energy Identification Code:	37Z000000004972G		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Ger-many
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gasunie	Emsbüren-Berge	Thyssengas	Emsbüren-Berge

Interconnection Point:	Etzel		
Energy Identification Code:	37Z000000006559E		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Jordgas Transport	Etzel/OGE	Open Grid Europe	Etzel

Interconnection Point:	Gernsheim		
Energy Identification Code:	37Z000000006481P		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Ger-many

Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gascade	Gernsheim	GRTgaz Deutschland	Gernsheim
Interconnection Point:	Kienbaum		
Energy Identification Code:	37Z000000001078I		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gascade	Kienbaum	Open Grid Europe	Kienbaum

Interconnection Point:	Lampertheim IV		
Energy Identification Code:	37Z000000001442N		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gascade	Lampertheim IV	terraneTS bw	Lampertheim IV

Interconnection Point:	Steinitz		
Energy Identification Code:	21Z000000000237O		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
ONTRAS	Steinitz	Open Grid Europe	

Interconnection Point:	Vitzeroda		
Energy Identification Code:	37Z000000007164W		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:

Gascade		Open Grid Europe	
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Interconnection Point:	Wardenburg RG		
Energy Identification Code:	37Z000000006389D		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gasunie Deutschland	Wardenburg RG	Open Grid Europe	Wardenburg

Interconnection Point:	Zone Gascade/ OGE		
Energy Identification Code:	37Y000000000385S		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gascade	Zone OGE	Open Grid Europe	Zone Gascade

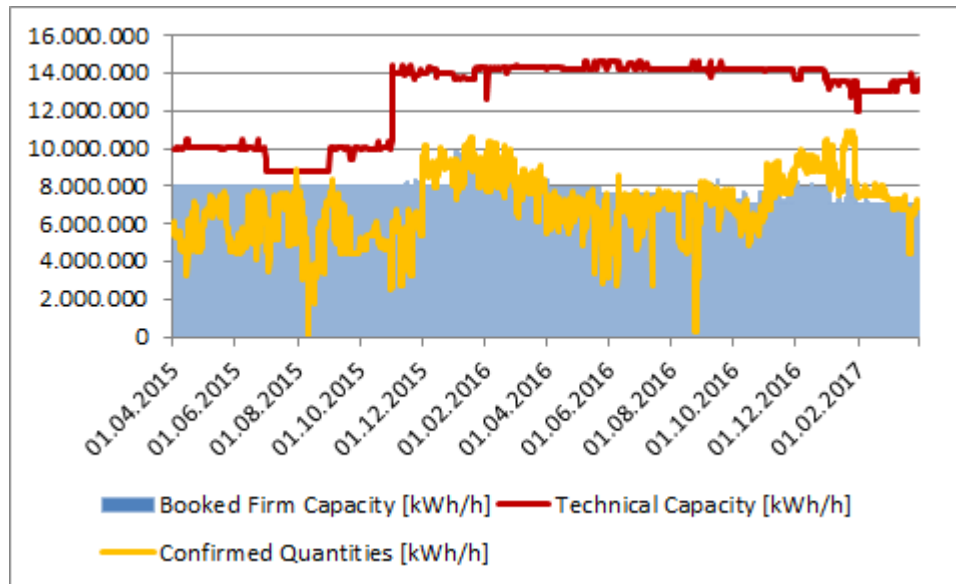
The following interconnection points currently connect GASPOOL's and NCG's L-Gas grids and are therefore not analyzed in the historical usage pattern:

Interconnection Point:	Ahlten		
Energy Identification Code:	37Z000000006231B		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
nowega	Ahlten	Open Grid Europe	Ahlten

Interconnection Point:	Steinbrink		
Energy Identification Code:	37Z0000000068681		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Nowega	Steinbrink	Open Grid Europe	Steinbrink

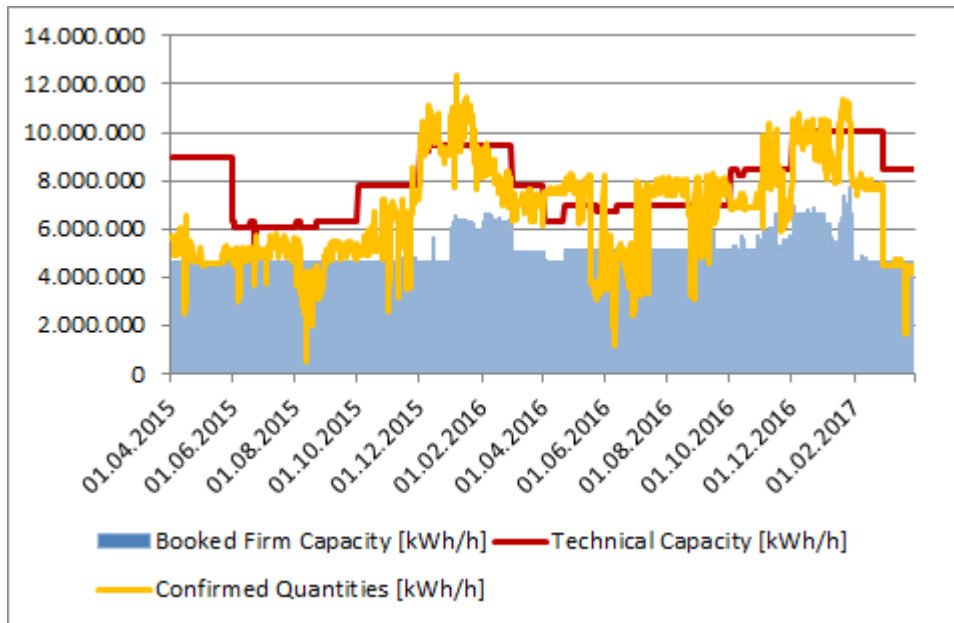
Interconnection Point:	Zone L-Gas GUD/OGE		
Energy Identification Code:	37Y000000000288Q		
Entry-exit-system:	GASPOOL	Entry-exit-system	Net-Connect-Germany
Transmission System Operator:	IP name:	Transmission System Operator:	IP name:
Gasunie Deutschland	Zone OGE (L)	Open Grid Europe	Zone GUD (L)

In addition, depending on the outcome of the analysis of the historical usage patterns an analysis of both the implementation and application of Congestion Management Procedures required by the CMP Guidelines and the possibility for and the actual use of capacity trading on the secondary market is performed. But as this analysis should not be an end in itself it is only performed if any sustained contractual congestion at the respective border is visible in the historic usage pattern.

a. Exit GASPOOL – aggregated

As a summary no sustained congestion is visible in the historic analysis that would indicate the need for additional firm capacity for the direction Exit GASPOOL. Therefore, no further analysis in respect to congestion management procedures and secondary marketing is performed.

b. Entry Net Connect Germany- aggregated



Although the confirmed quantities exceeded the technical capacity for a number of times sufficient firm capacity is available in the future to meet all existing demand. For these reasons, no further analysis of congestion management procedures and secondary marketing is performed.

ii. Relations to GRIPS, TYNDP, NDPs

2.1. German national development plan (NDP) 2015

The final German NDP 2015 is currently the latest binding German NDP. It uses project details that were submitted by respective project promoters. GASCADE's NOWAL (ID 083-06) is the only resulting project within the final German NDP 2015 directly affecting the technical capacity between GASPOOL and Net Connect Germany. It will connect both market areas at new interconnection point Drohne. NOWAL is justified by the conversion of several areas from L- to H-gas as well as a general increase of gas deliveries within the market area Net Connect Germany and will increase exit capacity in the GASPOOL market area.

2.2. German NDP 2016-2026

NOWAL as defined in the final German NDP 2015 was also introduced for the German NDP 2016-2026 (ID 083-07). Exit capacity from GASPOOL at Drohne was quantified of 6 GWh/h from 2018 to 2024 and 9.2 GWh/h in the following years. Increased capacity requirements result in additional projects. A pipeline diameter increase overcompensating a decrease in compression power secures sufficient exit capacity at GASPOOL (ID 409-01 in combination with ID 083-07). In order to enable flows, extension of measuring stations (ID 410-01) as well as construction of a new compressor unit at Rehden (ID 411-01) is additionally required. Within Net Connect Germany, a new compressor station at Legden (ID 416-01) is designated to allow further distribution of the additional gas quantities. Project owners are Open Grid Europe and Thyssengas, to provide firm capacity in the amount of 8.6 GWh/h at Drohne on. The supply extension will probably be provided from 12/2025 (NOWAL) resp. 12/2023 (VDS Legden) on. In compliance with a notice from BNetzA, received on 07.07.2017, the analysis is based on the latest knowledge from the NEP Gas 2016-2026, excluding abovementioned projects.

2.3. Ten Year Network Development Plan (TYNDP) 2017

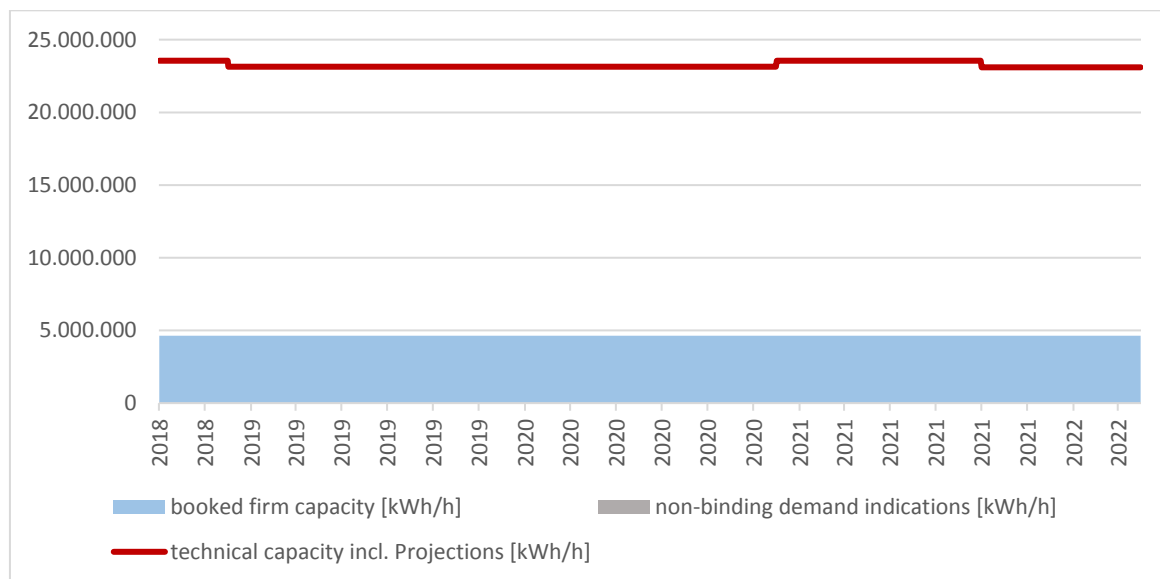
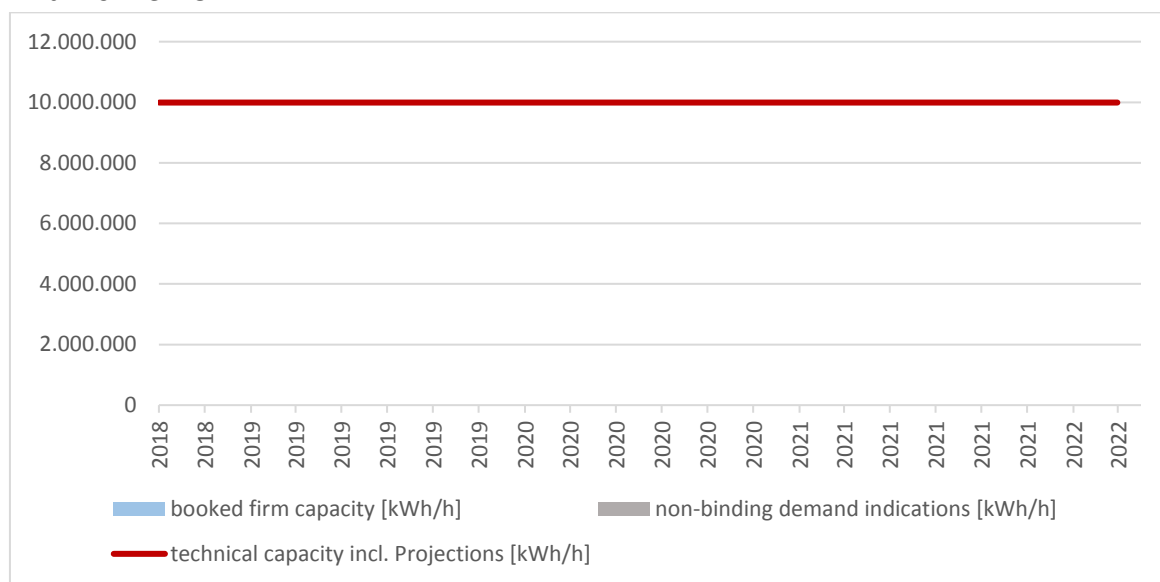
TYNDP 2017 reflects intermediate modelling results from the national network development planning. "Compressor station "Legden"" (ID TRA-N-825) and "NOWAL – Nord West Anbindungsleistung" (ID TRA-F-291) are both included. Except for capacity, NOWAL was submitted with the same specifications as in the German NDP 2016-2026. Exit capacities at GASPOOL are 9 GWh/h from 2018 to 2020, 14.2 GWh/h from 2021 to 2025, and 22.3 GWh/h starting in 2026 [Annex A2]. The individual capacity steps are caused by additional measuring capacity (2020/2021) and compressor unit commissioning (2025/2026). Legden was submitted based on the German NDP 2016-2026 as well. However, no additional entry capacity linked to the project was provided. Its effect on modelling outputs can thus not be quantified on the basis of TYNDP 2017. The TYNDP is a non-binding document whereas NDP in Germany is legally binding. Thus, the analysis on the GASPOOL side of the border is based on the NEP Gas 2016-2026 with adjustments as described above.

One can conclude that the expansion of the available capacity caused by these projects will contribute to ensure the supply between GASPOOL and Net Connect Germany.

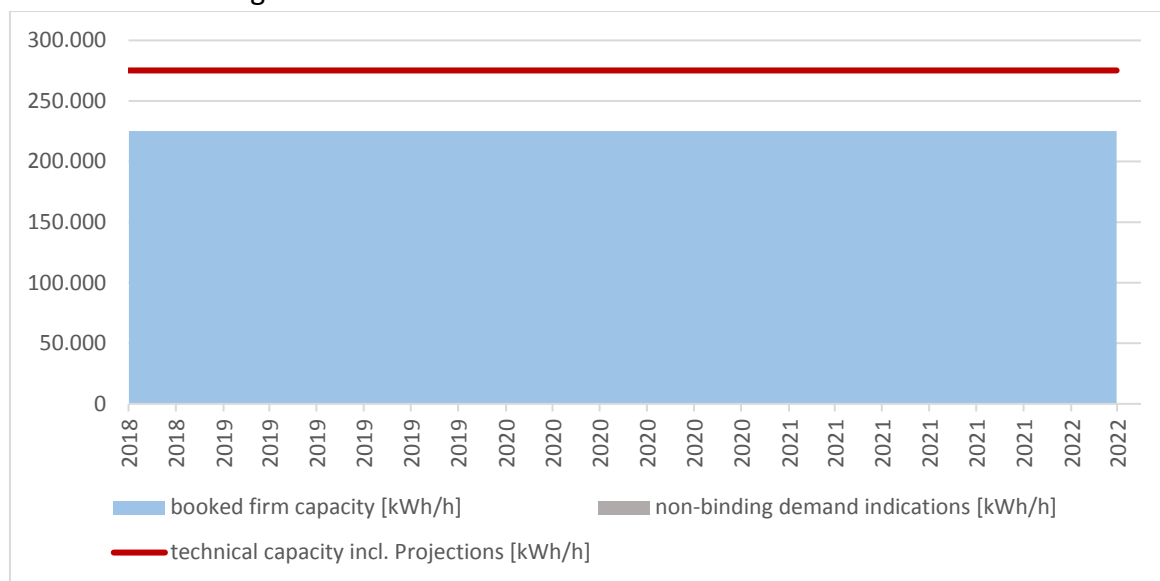
iii. Expected amount, direction and duration of demand for incremental capacity

The assessment of the demand for incremental capacity will be conducted by analyzing the technical capacity, the booked firm capacity and the non-binding demand indications received for the H-Gas interconnection points of the relevant entry-exit system border. The data used for this analysis is determined on the basis of the published data of the concerned transmission system operators. Projects currently under construction and planned projects are also taken into account according to ii.

The non-binding demand indication requests freely allocable capacity at Entry Net Connect Germany and restrictedly allocable capacity at Exit GASPOOL. Within the request the firm restrictedly allocable Entry capacity connected with the firm restrictedly allocable Exit capacity was requested for the market area border of the Russian Federation or connection point to the storage facility Rehden. The only interconnection points within the GASPOOL market area currently satisfying both conditions on both sides of the border (and on which capacity is available on both sides of the border) are the interconnection points Drohne NOWAL and Emsbüren-Berge. For this reason, the assessment is not only performed on an aggregated basis for all interconnection points on both sides of the entry-exit-system border, but also performed separately for the stated interconnection points. In both cases only firm freely allocable capacity and firm restrictedly allocable capacity complying with the stated demand will be considered. To obtain the aggregated technical and booked firm capacity for the entry-exit system border the values of the single interconnection points considered are added up.

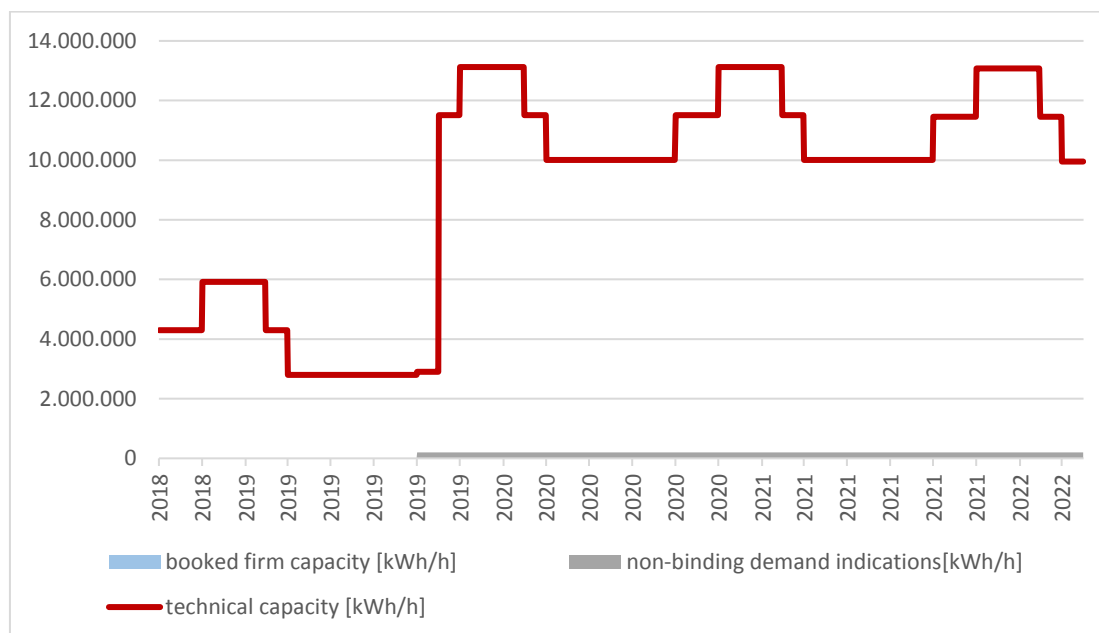
a. Exit GASPOOL**Exit GASPOOL - aggregated****Exit Drohne NOWAL**

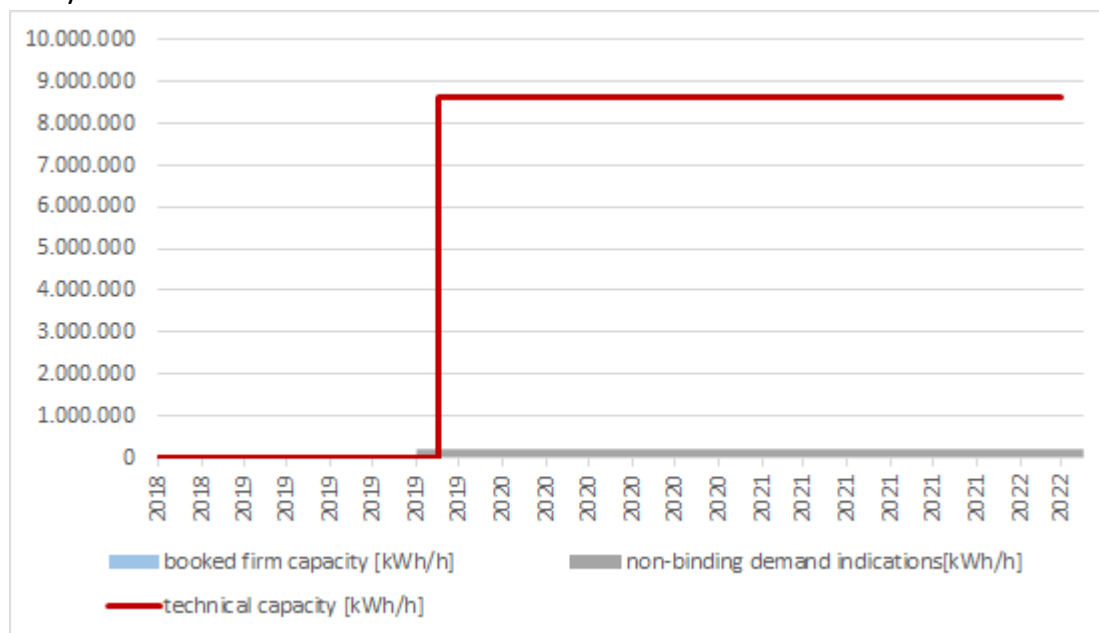
Exit Emsbüren-Berge



b. Entry Net Connect Germany

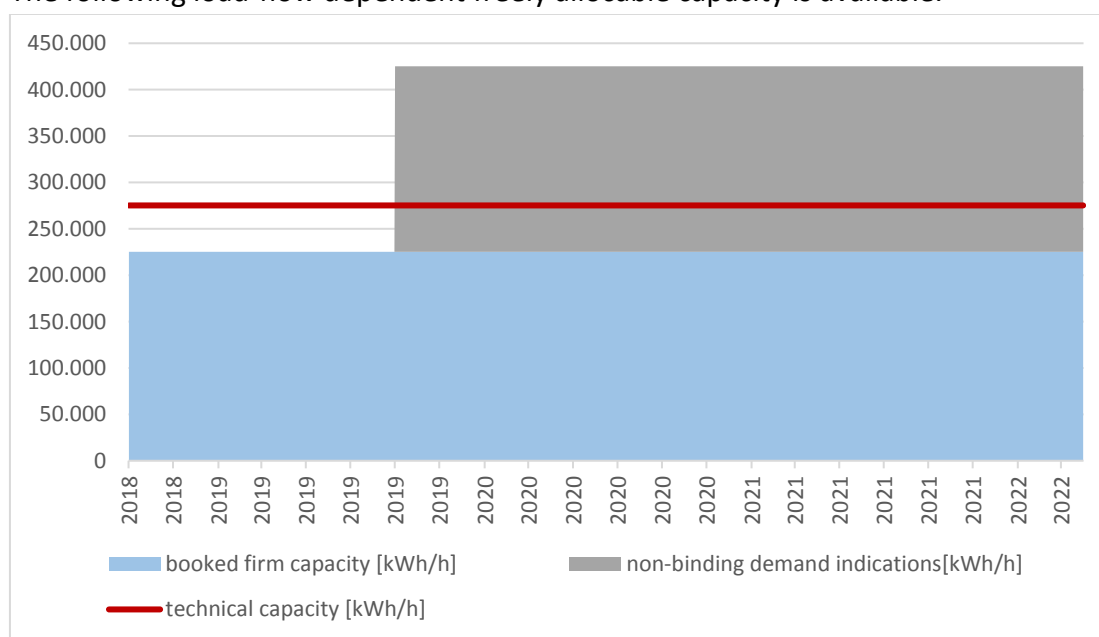
Entry Net Connect Germany - aggregated



Entry Drohne NOWAL³

Entry Emsbüren-Berge

The following load-flow dependent freely allocable capacity is available.



³ Due to market signals Open Grid Europe conducted an inquiry for long term capacity demand at the entry points Dornum, Emden EPT, Oude Statenzijl, Bunder Tief, Drohne NOWAL (H) and Achim II starting the 13th October 2016 until the 11th November 2016. Based on the received feedback Open Grid Europe performed a reallocation of freely allocable capacities amongst others to the interconnection point Drohne NOWAL (H) in the amount of 8,6 GW from the 1st November 2019 on. In case the reallocated capacity is (partly) not booked on a long-term basis Open Grid Europe reserves the right to reallocate not booked capacity to other interconnection points with demand indications.

In order to determine whether a technical study is necessary, the criteria defined under Point C is checked. This check is carried out for each relevant entry-exit-system. In conclusion, a statement is made as to whether an incremental capacity project is initiated and whether technical studies need to be produced in the eyes of the involved TSO.

C. 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. Depending on whether a demand for incremental capacity is identified on one or both sides of the border of the entry-exit system an incremental capacity project will be started on one or both sides a the specific entry-exit system.

Deviations can occur only if there are justified individual instances.

If an incremental capacity project is initiated then technical studies will be conducted for potentially all IPs of the respective entry-exits 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 Article 27 of NC CAM. Thereby economical aspects and aspects of grid topology will be taken into account.

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. Exit GASPOOL

The charts provided in B iii clearly indicate that the sum of both booked firm capacity and demanded incremental capacity are lesser than the technical capacity available at the market area border resp. at the interconnection points Drohne NOWAL and Emsbüren-Berge. Therefore the TSOs in the GASPOOL market area do not deem it necessary to start an incremental capacity project.

b. Entry Net Connect Germany

The charts provided in B iii clearly indicate that the sum of both booked firm capacity and demanded incremental capacity are lesser than the technical capacity available at the market area border. At the interconnection point Drohne NOWAL the same applies from November 2019 on. The transmission system operators will evaluate whether a reallocation of at least 0,2 GW from 1st October 2019 to (and including) 31st October 2019 to Entry Drohne NOWAL or Emsbüren-Berge is possible and if it is possible perform the reallocation of capacity before the auction for yearly capacity products in July 2019.

If not – given the short timeframe of one month for the demand for incremental capacity - the TSOs in the NCG market area do not deem it necessary to start an incremental capacity project.

D. 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.

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

According to Article 26 (11) of Regulation (EU) 2017/459 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 has no significance on any following cycles.

For the incremental capacity cycle addressed by this report, the following regulations in respect to fees apply: No fees have been charged by the involved TSOs for this cycle of incremental capacity.

G. Contact information

GASCADE Gastransport GmbH

Michael Walkus

+49 561 934 2968

Michael.walkus@gascade.de

Gasunie Deutschland GmbH

Ksenia Berezina

+49 511 640 607 2831

Ksenia.berezina@gasunie.de

GRTgaz Deutschland GmbH

Albert Kobbe

T.: +49 (0) 30 72619049 – 24

new-capacity@grtgaz-deutschland.de

Fluxys Deutschland

Alessandro Brunoni

T.: +49 (0)211 420909-22

alessandro.brunoni@fluxys.com

jordgasTransport GmbH

Anke Struckmeier-Eickenberg

T.: +49 (0)170 7956314

anse@jordgastransport.de

Nowega GmbH

Christian Schröder

T.: +49 (0)251 60998-301

c.schraeder@nowega.de

ONTRAS Gastransport GmbH

René Döring/Uwe Thiveßen

T.: +49 (0)341 27111-2771/2163

capacity@ontras.com

Open Grid Europe GmbH

T.: +49 (0)201 3642-12222

gastransport@open-grid-europe.com

terraneTS bw GmbH

Kerstin Köppe

T.: +49 (0)711 7812-2041

Incremental@terraneTS-bw.de

Thyssengas GmbH

Henrik Schultz-Brunn

T.: +49 (0)231 91291-3188

incremental_capacity@thyssengas.com

OPAL Gastransport GmbH

Michael Walkus

+49 561 934 2968

Michael.walkus@gascade.de