

**Demand assessment report
for the incremental capacity process
starting 2019 between
the Czech Republic and
the Trading Hub Europe 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

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 the Czech 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. No non-binding demand indications submitted after the deadline referred to in Art. 26 paragraph 6 of Regulation (EU) 2017/459 were received after the 2017 incremental capacity process. Non-binding demand indications received after the deadline will be considered in the next market demand assessment report.

B. Demand assessment

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 (hereinafter GasNZV) which in § 21 p. 1 s. 2 obliges transmission system operators (hereinafter 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 (NCG) or GASPOOL.

Therefore, only demand indication for the borders of the Trading Hub Europe can be stated in the incremental cycle 2019 – 2021 (and following) and only those will be evaluated.

Due to the complexity of developing a joint capacity model the evaluation of requested capacity will be based on the latest legally binding version of the German network development plan gas (hereinafter NEP) 2018 – 2028. In the further process of incremental capacity this basis for planning can change and a new assessment of already done conclusions could be necessary. All known facts will be incorporated into the process to the best of one’s knowledge and belief, still the TSOs

reserve the right to amend the input values for capacity modelling.

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.

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