

**Demand assessment report
for the incremental capacity process
starting 2017
between
NetConnect Germany and ZTP (Belgium)**

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

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Table of contents

A.	Non-binding Demand indications	4
B.	Demand assessment	4
i.	Historical usage pattern	4
ii.	Relations to GRIPS, TYNDP, NDPs	4
iii.	Expected amount, direction and duration of demand for incremental capacity	5
C.	Conclusion for the (non)-initiation of an incremental capacity project/process	5
D.	Provisional timeline	5
E.	Interim arrangements for the auction of existing capacity on the concerned IP(s)	5
F.	Fees	5
G.	Contact information	6

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 Germany and Belgium was 6th April to 1st 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.

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

According to the German Network Development Plan Gas “NEP Gas 2016 - 2026” (2nd draft)¹ the projects “Reverse Flow TENP” (ID 305-02), “VDS Verlautenheide (VDS ZEELINK)” (ID 203-02) and “ZEELINK” (ID 204 and 205) will affect the border of the aforementioned entry-exit systems. The “Reverse Flow TENP” project will allow an additional transport of gas coming from the south/south-east region. The project is listed in the ENTSOG TYNDP 2017² under TRA-F-208 and is listed also as project of common interest (PCI). “VDS Verlautenheide (VDS ZEELINK)” and “ZEELINK” will allow an increased transport in North-South and South-North direction and are also foreseen to support the supply of areas affected by the conversion from low-calorific to high calorific gas. Both projects are summarized under TRA-N-329 in the ENTSOG TYNDP 2017.

In her latest Ten-Year Indicative Investment Programme³ Fluxys Belgium identified the possibility of a capacity expansion at the Eynatten border station on the Belgian-German border stemming out of projects in Germany. Both the GRIP North West⁴ and the GRIP South North Corridor⁵, where Belgium and Germany are featured, are consistent with TYNDP 2017.

¹ German Network Development Plan Gas 2016 – 2016 (Second Draft) – published 05 April 2017

² ENTSOG Ten-Year Network Development Plan 2017 - published on 28 April 2017

³ Ten-Year Indicative Investment Programme Fluxys Belgium & Fluxys LNG 2017-2026 - published in December 2016

⁴ North West Gas Regional Investment Plan 2017 - Published on 4 April 2017

⁵ South North Corridor Gas Regional Investment Plan 2017 - Published on 11 July 2017

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.

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. The next incremental process will at the latest start after the yearly capacity auction in 2019, unless triggered sooner by non-binding demand indications submitted in the meantime.

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, neither Fluxys Tenp, OGE, Thyssengas nor Fluxys Belgium introduced a fee for the evaluation and processing of non-binding demand indications.

G. Contact information

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