

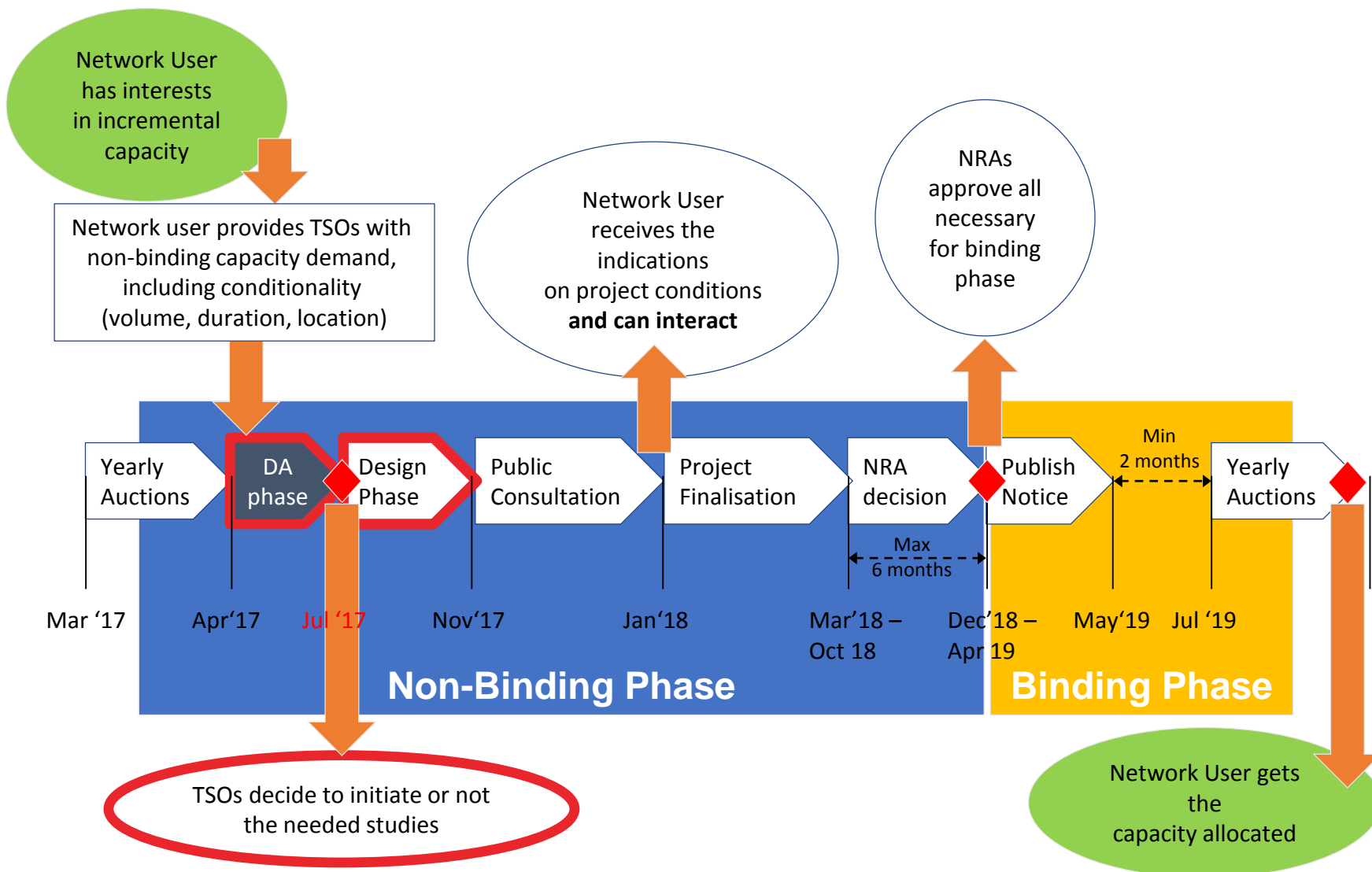
Incremental Capacity

Overview of initiated INC projects after demand assessment phase 2017

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INC process - 1st initiation in April 2017





Overview on INC projects



Results after the first Market demand assessment

- > Network users submitted non-binding **demand indications at 18 market area borders / interconnection points**
- > **10 Market demand assessment reports concluded that technical studies for an incremental capacity project will be initiated**
- > For one market area border the report has not been published yet



Overview on INC projects



Entry-Exit border	Gas flow direction to be considered	Project information	TSOs who are involved in DAR
AT-DE (NCG)	entry Austria	technical available capacity covers NCG-sides Gas Connect Austria will update already initiated project in the national network development plan for entry AT	Gas Connect Austria, OGE, bayernets, GRTgaz D
HU-AT	exit Hungary/entry Austria	Gas Connect Austria will initiate an incremental project for exit AT DI on FGSZ-side already covered by project in national development proposal	Gas Connect Austria, FGSZ
AT-SI	exit Slovenia	technical studies and project proposal to be conducted by Gas Connect Austria and activities followed correspondingly by Plinovodi	Plinovodi, Gas Connect Austria
HR-SI	exit Croatia/entry Slovenia	measures will be taken in the frame of already initiated projects	Plinovodi, Plinacro
SR-HU	exit Serbia/entry Hungary	technical study will be conducted	FGSZ, SRBIJAGAS
DE (GP)-NL	exit DE (GP)/entry Netherlands	technical study will be conducted	GTS, GUD, GASCADE, GTG Nord
DE (GP)-PL (GCP)	exit Poland/entry DE (GP)	technical study will be conducted	Gaz System, Ontras
DE (GP)- RU	entry DE (GP)	technical study will be conducted	GASCADE, NEL, OPAL, Fluxys D, GUD
GR-IT	exit Greece/entry Italy	technical study will be conducted	SNAM RETE GAS, DESFA
IT- Malta	exit Italy/entry Malta	technical studies will be conducted	SNAM RETE GAS
RO-BG	exit Romania/entry Bulgaria	DAR will be published soon	Bulgartransgaz, Transgaz



Overview on INC projects





Project Characteristics



Austria – Germany

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
NetConnect Germany, Germany	Market Area East, Austria	2018 - 2027	Entry: demand at Entry Überackern SÜDAL has been indicated - already submitted in 2016 Exit: demand lower than available capacity	<i>Market Area East: Freely allocable firm; plan to offer incremental freely allocable capacity in yearly auction in July 2018; potentially a bundled auction with restricted allocable firm capacity; relevant project in Austrian development plan will be updated; NCG: Restricted allocable firm (Überackern 2 - storage Haidach)</i>



Project Characteristics



Austria – Hungary

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Hungary	Market Area East, Austria	2019/20 – 2036/37	Entry: Project 1: 6,378,300 kWh/h Project 2: 11,115,307 kWh/h Exit: 6,378,300 kWh/h	<i>Market Area East (IP Mosonmagyaróvár): Project 1 results from Austrian national network development Plan 2017-2026 - NSI East Gas priority corridor (“ROHUAT/BRUHA) and alternative allocation mechanism (‘‘ROHUAT Open Season’’); Project 2 results from Project 1 plus additional incremental capacity demand received on top Hungary (IP Mosonmagyaróvár): incremental capacity project is part of the Hungarian National Development Proposal 2016-2025 and also included ENTSG’s TYNDP 2017 document (not approved yet)</i>



Project Characteristics



Austria – Slovenia

From “EXIT CAPACITY”	To “ENTRY CAPACITY”	Gas year	Amount	Additional Information
Market Area East, Austria	Slovenia	From 2020/21	Entry/Exit: 9,070,838 kWh/h	<p><i>binding demand in yearly auction 2017 too low for positive economic test of projects:</i></p> <ul style="list-style-type: none">• GCA – Entry/Exit Murfeld• Plinovodi – Upgrade of Murfeld/Ceršak interconnection, Upgrade of Rogatec interconnection, CS Kidričevo, 2nd phase of upgrade <p><i>However, Priority Corridor North-South Gas Interconnections in Central Eastern and South Eastern Europe includes the Cluster Croatia — Slovenia — Austria with above mentioned projects as PCIs</i></p>
Slovenia	Market Area East, Austria	From 2020/21	Entry/Exit: 6,937,800 kWh/h	<p>→ <i>corresponding projects are included in the Austrian and Slovenian national development plans</i></p> <p>→ <i>technical studies will be performed by GCA and Plinovodi</i></p>



Project Characteristics



Bulgaria – Romania

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Romania	Bulgaria	To follow	To follow	<i>Demand indications have been received, But so far no demand assessment report has been published</i>

Croatia – Slovenia

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Croatia	Slovenia	<p>Not stated in the report</p> <p>2018/19 – 2034/35 (period of non-binding indications)</p>	<p>Entry/Exit: Not stated in the report (indicated by NUs up to 1,100,023 kWh/h)</p>	<p><i>Direction SI-HR: demand for capacity has been received, which does not include incremental capacity</i></p> <p><i>Direction HR-SI: Received indicative demands for the at IP Rogatec are dependent on the new sources of natural gas i.e. LNG Terminal Krk, IAP or potential new gas flow in direction HU-HR-SI etc.</i></p>



Project Characteristics



Germany – Poland

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
GCP GAZ-SYSTEM, Poland	GASPOOL, Germany	not stated in the report 2019/20 – 2034/35 (period of non- binding indications)	Exit: not stated in the report (indicated by NUs 910,676 kWh/h) Entry: not stated in the report (indicated by NUs 2,025,676 kWh/h)	<i>GASPOOL:</i> <i>Due to the merging of the market areas in Germany, not ensured that given technical capacity used in the Market Demand Assessment Report will be available from 01.04.2022 onwards + other, currently non-involved TSOs may have to be included</i> <i>TYNDP project partially covers non- binding demand [up to 1,112,083 kWh/h/1,116,667 kWh/h (2nd step)]</i> <i>General:</i> <i>Offer levels will be assessed later, being output of the technical study</i>



Project Characteristics



Germany – Russia

From “EXIT CAPACITY”	To “ENTRY CAPACITY”	Gas year	Amount	Additional Information
Russia	GASPOOL, Germany	not stated in the report 2025/26 – 2039/40 (period of non- binding indications)	Entry: not stated in the report (indicated by NUs 13,191,273 kWh/h)	<p>GASPOOL: <i>Demand indications exceed technical capacity + new capacity according to TYNDP 2017 projects for the expansion of the capacities from Russia to GASPOOL in the Advanced Infrastructure Scenario (based on demand indicated in the “more capacity” market survey)</i></p> <p><i>Due to the merging of the market areas in Germany, not ensured that given technical capacity used in the Market Demand Assessment Report will be available from 01.04.2022 onwards + other, currently non-involved TSOs may have to be included</i></p> <p>General: <i>Offer levels will be assessed later, being output of the technical study</i></p>



Project Characteristics



Germany – Netherlands

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
GASPOOL, Germany	Netherlands	not stated in the report 2025/26 – 2039/40 (period of non-binding indications)	Exit: not explicitly stated in the report (indicated by NUs up to ~ 12,000,000 kWh/h) Entry: not explicitly stated in the report (indicated by NUs up to ~ 10,000,000 kWh/h)	<i>GASPOOL:</i> <i>Restricted allocable firm capacity from the border Russian Federation/GASPOOL</i> <i>TTF:</i> <i>Firm capacity</i>



Project Characteristics



Hungary – Serbia

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Serbia	Hungary	not stated in the report 2019/20 – 2034/35 (period of non-binding indications)	Exit/Entry: 12,129,000 kWh/h	<i>Direction Serbia > Hungary:</i> <i>IP Kiskundorozsma is not functional in direction Serbia-> Hungary yet and needs further investments to operate in both directions.</i> <i>Direction Hungary > Serbia:</i> <i>No technical studies considered for</i>

Italy – Malta

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Italy	Malta	From 2025/26	Exit/Entry: 56,000,000 kWh/d	Project connecting Malta to Italy at Gela is already included in 2nd union list of PCI



Project Characteristics

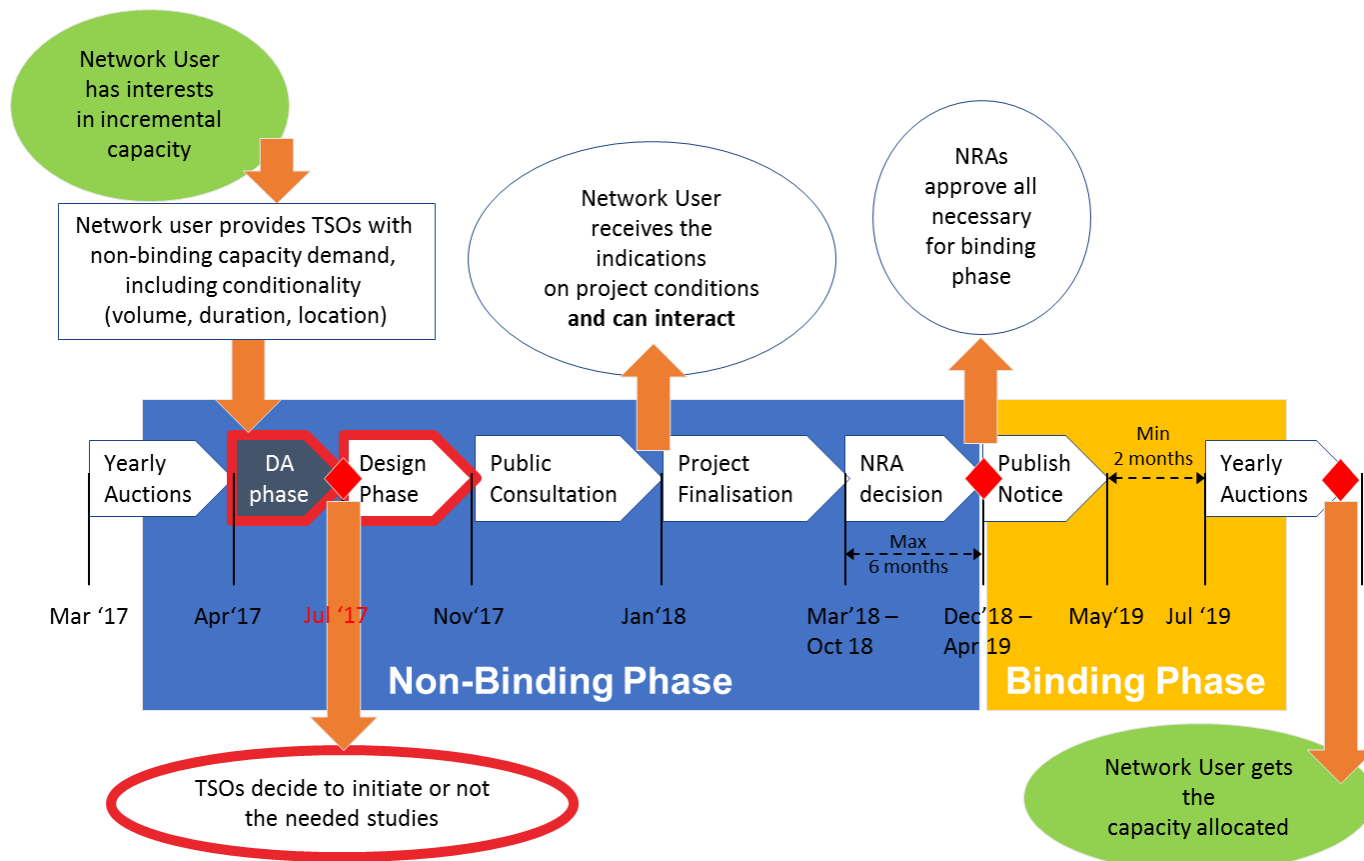


Italy – Greece

<i>From “EXIT CAPACITY”</i>	<i>To “ENTRY CAPACITY”</i>	<i>Gas year</i>	<i>Amount</i>	<i>Additional Information</i>
Greece	Italy	2019/20 – 2039/39	Entry/Exit: 357,672,000 kWh/d	<p>TYNDP 2017 + Southern Corridor Gas Regional Investment Plan include two projects for interconnection between Greece and Italy via Turkey:</p> <ul style="list-style-type: none">• Poseidon: direct connection Greece and Italy, enabled by Komotini - Thesprotia• Trans Adriatic Pipeline: indirect connection Greece and Italy through Albania <p>Greece: TYDP 2016-2025 includes Komotini - Thesprotia project, with interconnection point to Poseidon project</p> <p>Italy: NDP 2016 – 2025 mentions Poseidon project + Trans Adriatic Pipeline, maybe relevant to the capacity request</p>

INC process 2017

- Next steps
 - Public consultations on INC projects to be initiated latest on 20 October





Thank You for Your Attention

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