

**Demand assessment report  
for incremental capacity  
between *Austria (Market Area East)*  
and *Slovenia***

**2017-07-27**

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

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## A. Non-binding Demand indications

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)

\* 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)

\* 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**

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## **B. Demand assessment**

### **i. Historical usage pattern**

Historic usage can be found in the national planning documents ([GCA](#), [Plinovodi](#)) and the ENTSOG TYNDP.

### **ii. Results of current annual yearly auction**

Results of the annual yearly auction in March 2017 did not show enough binding demand for a positive economic test of the GCA project #GCA2016/03 Entry/Exit Murfeld and Plinovodi projects TRA-N-389 Upgrade of Murfeld/Ceršak interconnection, TRA-N-390 Upgrade of Rogatec interconnection, TRA-N-94 CS Kidričevo, 2nd phase of upgrade. Incremental capacities have been offered in a bundled Auction.

### **iii. Relations to GRIPS, TYNDP, NDPs**

The Priority Corridor North-South Gas Interconnections in Central Eastern and South Eastern Europe („NSI East Gas“) includes the Cluster Croatia — Slovenia — Austria (# 6.26). This includes several PCI such as “GCA 2014/04 Murfeld (AT) #6.26.4” on Austria side and “Upgrade of Murfeld/Ceršak interconnection (AT-SI) #6.26.5”, “Upgrade of Rogatec interconnection #6.26.6” and “CS Kidričevo, 2nd phase of upgrade #6.26.2” on Slovenian side.

On the Austrian side a corresponding project is included in the approved national development plan 2017-2026 (#GCA2016/03) and on the Slovenian side all three corresponding projects are included in the “Ten-year gas transmission network development plan for the 2017-2026 period” (under group C-development of interconnection points: C4 Upgrade of Murfeld/Ceršak interconnection, C5 CS Kidričevo, 2<sup>nd</sup> phase of upgrade and C12 Upgrade of Rogatec interconnection).

### C. Conclusion for the (non)-initiation of an incremental capacity project/process

The planned volumes reflect the corridor estimation which has been announced by the TSOs in 2015 and 2016. TSOs have applied to continuously keep the existing projects on the 3<sup>rd</sup> Union-wide PCI list. TSOs along the corridor strongly support the projects and see an upright demand.

The following projected technical capacities at E/E border point refer to the listed PCI:

Austria to Slovenia, starting from 2021/22  
 9,070,838 kWh/h (bundled and freely allocable)  
 Slovenia to Austria, starting from 2021/22  
 6,937,800 kWh/h (bundled and freely allocable)

TSOs assume that the postponement of the commissioning timeline of the LNG terminal in Croatia resulted in a low booking level in this year's annual auctions at relevant points. So, the economic test has not been positive in 2017. Nevertheless, Slovenian TSO Plinovodi received some non-binding demand for incremental capacities after the deadline defined in the 6<sup>th</sup> paragraph of the Article 26, Regulation 2017/459. The non-binding demand is referring for incremental capacities Ceršak Exit and correspond to the received non-binding demand on other IPs. The received non-binding demand shall be considered according to the paragraph 7 of the Article 26, Regulation 2017/459.

The rescheduling of the projects will be reflected in the national network development plans. A corresponding project to the PCI will be taken into account. The technical parameters according to the PCI list and ENTSO TYNDP 2017 will remain unchanged. Market Demand Assessment will be, according to the Article 26, Regulation 2017/459 performed on regular basis. Slovenian TSO opt to perform the assessment every year.

Gas Connect Austria intends to conduct the technical studies and the consultation of the draft project proposal according to the following provisional timeline:

Start Date	End Date	Description
27.7.2017		Start of design phase
27.7.2017	11.08.2017	Technical studies
06.09.2017	02.10.2017	Public consultation
tba		Yearly Auction (allocation of 15 years) to be aligned with adjacent TSO

Slovenian TSO will follow activities regarding Austrian TSO activities.



## **D. Fees**

For the incremental capacity cycle addressed by this report, involved TSOs did not introduce a fee for the evaluation and processing of non-binding demand indications.

## E. Contact information

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