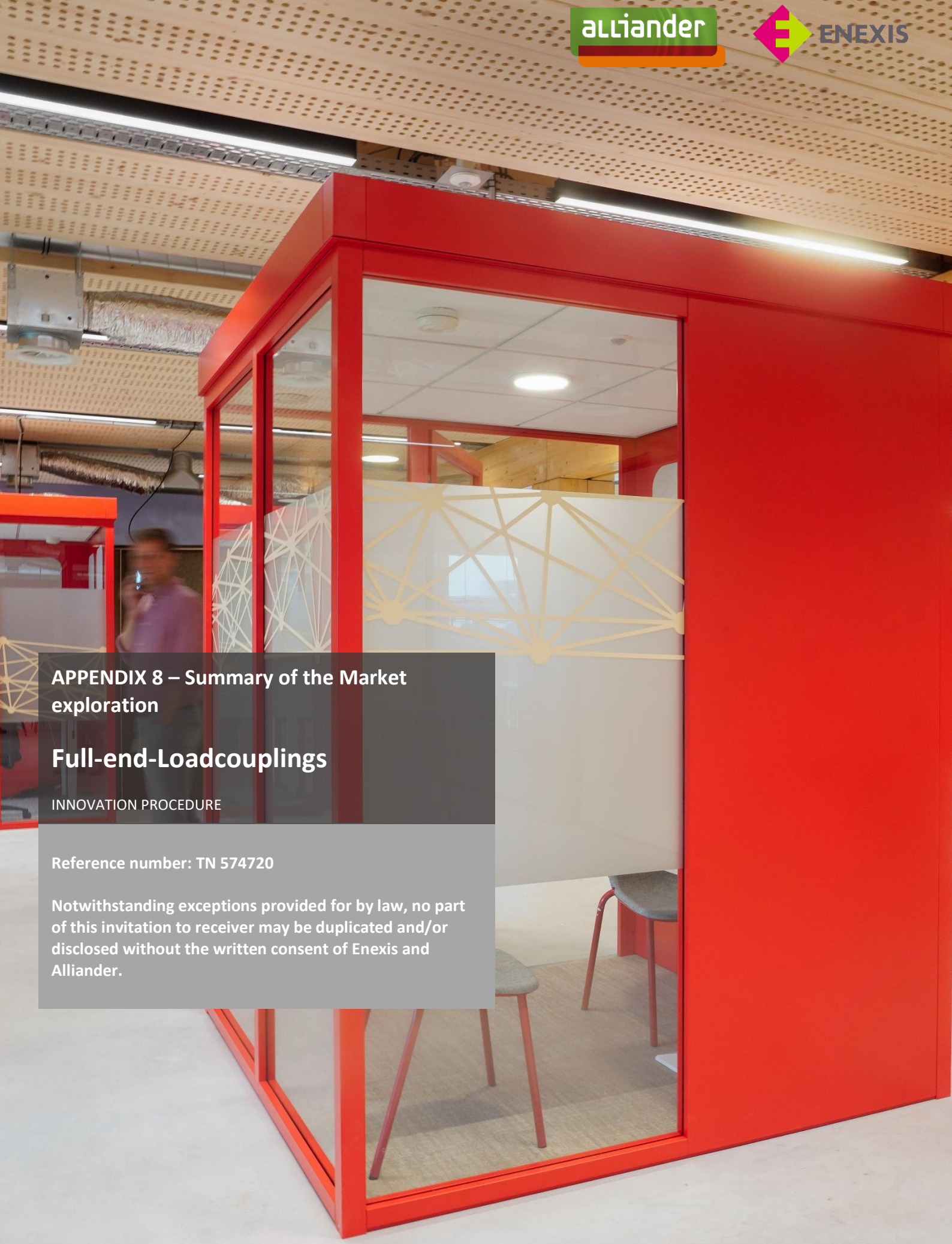

APPENDIX 8 – Summary of the Market exploration

Full-end-Loadcouplings

INNOVATION PROCEDURE

Reference number: TN 574720

Summary of the Market exploration

Context and Objective In preparation for the tender "Development and supply of Full-end-load resistant couplings", Enexis Netbeheer B.V. and Alliander N.V. (the DSOs) conducted a market exploration. The objective of this exploration was to assess market readiness, technical feasibility, and the willingness of manufacturers to develop full-end-load resistant mechanical couplings for PE pipelines (specifically without the use of fusion techniques).
The insights gathered from the participating manufacturers have directly shaped the chosen procurement strategy and functional requirements.

Key Findings
1. Product Availability and Technical Feasibility The exploration confirmed that a uniform, full-end-load resistant mechanical coupling for the requested diameter range is currently not available as a standard, off-the-shelf product. However, manufacturers indicated that the development of such a product is technically feasible and can be achieved within a realistic timeframe.

2. Willingness to Invest and Volume Commitment The market showed a strong interest in developing the required solution. Manufacturers are willing to invest their own resources into the necessary Research & Development (R&D). However, they clearly stated a strict condition: to justify the R&D business case, there must be a prospect of a guaranteed commercial volume upon successful development and certification.

3. Intellectual Property (IP) and Continuity During the exploration, the allocation of Intellectual Property was a key topic. Manufacturers strongly prefer to retain ownership of the IP they develop. The DSOs acknowledge this and concluded that a balanced approach is required: the developing party may retain the IP rights, provided that the DSOs obtain the necessary, ongoing usage rights (licenses) and that strict continuity measures (such as Escrow agreements) are put in place to secure the energy infrastructure.

4. Certification Timelines Manufacturers emphasized that obtaining the necessary formal certifications (such as GASTEC QA) is a rigorous and time-consuming process. Consequently, a dedicated certification phase must be incorporated into the project timeline before commercial mass production can commence.

Conclusion: Choice of Procurement Procedure The feedback obtained during the market exploration directly influenced the choice of the procurement procedure. Because the required product requires significant R&D and is not available off-the-shelf, a standard open procedure is unsuitable.
To bridge the gap between development and commercialization, and to meet the market's fundamental need for a volume commitment to justify their investments, the DSOs selected the **European Innovation Partnership** procedure. This allows the DSOs to partner with the market during the R&D and certification phases, and seamlessly transition into the commercial purchasing phase under a single framework agreement.