ENEXIS NETBEHEER

Appendix 2

Summary Market Consultation

REFERENCE NUMBER: TN 591875

Version 2025

1. Summary of the market consultation

Prior to the publication of the tender for NH fuse switch disconnectors, Enexis Netbeheer B.V. published a market consultation on 15-03-2026 on the procurement platform Mercell, where respondents were able to give written answers until 30-03-2026. The respondents were asked to give a written response on questions regarding the technical, procurement and supply chain challenges Enexis is facing regarding the procurement of NH fuse switch disconnectors. Furthermore, the technical specifications of the previous tender were shared with the market. Ultimately, 8 parties have responded to the market consultation. Based on the feedback given from respondents, this summary has been made.

The purpose of this consultation was to:

- Gather insights into available products, technologies, and market practices
- Assess the structure, maturity, and competitiveness of the market
- Identify potential risks related to technical feasibility, supply chain and pricing
- Collect feedback on the scope and specifications of the planned tender
- Facilitate early dialogue with the market to improve the quality and feasibility of the procurement

Participation was voluntary and non-binding. The consultation did not constitute a prequalification or selection process.

2. Scope of the Consultation

The consultation focused on NH fuse switch disconnectors and related low-voltage distribution solutions, including:

- Technical design and performance characteristics
- Compliance with relevant standards and testing
- Supply chain organization and delivery capability
- Market availability and production capacity
- Commercial considerations, including pricing and contract structures
- Sustainability and innovation aspects

Suppliers were invited to respond to a structured set of questions covering both technical and organizational topics.

3. Market Structure and Participation

The consultation confirmed that the market for NH fuse switch disconnectors is:

- Internationally oriented, with production facilities typically located across Europe and globally;
- Comprised of both original equipment manufacturers (OEMs) and local representatives or distributors;
- Supported by suppliers with experience in utility (DSO) and industrial applications

Several suppliers explicitly confirmed their interest in participating in a future tender and indicated their preferred participation models (direct supply, cooperation with panel builders, or hybrid models).

For some suppliers, clarification of the exact scope (components, assemblies or complete systems) is relevant to determine their role in the supply chain.

4. Technical Findings

4.1 Product Availability and Standards

Suppliers confirmed that:

- NH fuse switch disconnectors are standardized and widely available products
- Products are designed in accordance with international standards such as IEC 60947-1 and IEC 60947-3
- Solutions are commonly applied in grid infrastructure and industrial environments, with proven operational track records

4.2 Design Characteristics

Typical product characteristics mentioned include:

- Use of durable materials such as copper alloys and spring-loaded contact systems to ensure stable electrical performance
- Designs that support long service life and consistent contact pressure over time
- Compatibility with a wide range of conductor sizes and installation configurations
- Accessibility for inspection and maintenance (e.g. visual inspection, thermal imaging) and the use of Enexis' used measurement tools.

4.3 Standardization vs. Flexibility

Suppliers indicated that:

- A significant level of standardization is feasible, supporting efficiency and scalability
- However, a certain degree of flexibility in specifications may be required to accommodate differences in design concepts between manufacturers.

5. Supply Chain and Delivery Capability

5.1 Production and Planning

Suppliers typically operate:

- Centralized or multi-site production facilities, often outside the Netherlands
- ERP-driven production planning systems, based on demand forecasting and production schedules.

5.2 Risk Mitigation Measures

To ensure delivery continuity, respondents reported the use of:

- Safety stock and buffer stock strategies
- Multiple sourcing of critical raw materials (e.g. metals and plastics)
- Flexible production capacity to respond to fluctuations in demand.

Some suppliers also maintain local inventory or warehousing in the Netherlands, enabling shorter delivery lead times.

5.3 Dependency on Forecasting

A recurring point from suppliers is that:

- Stable and reliable forecast information from the contracting authority is essential
- Early communication of demand changes (e.g. project peaks) significantly improves supply chain performance and reduces risks

6. Commercial and Contractual Insights

6.1 Pricing and Indexation

Respondents indicated that:

- Raw material price volatility (e.g. metals) has a significant impact on product pricing
- The application of price indexation mechanisms, for example linked to commodity indices (such as LME), is recommended to ensure fair and sustainable pricing over the contract term.

6.2 Transparency and Predictability

Respondents emphasized the importance of:

- Transparent pricing structures
- Predictable demand patterns
- Clear contractual arrangements regarding scope and responsibilities.

6.3 Scope Definition

For several respondents it is important to distinguish between:

- Supply of individual components (NH fuse switch disconnectors);
- Supply of assembled systems or panels;
- Cooperation with third parties (e.g. panel/rack/cabinet builders).

7. Sustainability and Innovation

Respondents indicated that:

- Sustainability is increasingly embedded in product design, material selection and manufacturing processes
- There is support for incorporating sustainability considerations in the tender
- Such requirements should remain proportionate, measurable and technically feasible

8. Key Conclusions from the Consultation

Based on the responses received, Enexis concludes that:

- The market is mature, competitive and capable of delivering the required products at scale
- There is sufficient supplier interest and capacity to ensure effective competition
- Technical solutions are largely standardized, with opportunities for optimization within defined specifications
- Supply chain risks can be effectively mitigated, provided that collaboration on forecasting and planning is ensured
- Appropriate contractual mechanisms (e.g. indexation) contribute to long-term stability
- The market is receptive to sustainability requirements, within realistic and achievable boundaries

9. Use of the Results

The outcomes of the market consultation have been used to:

- Refine the scope of the tender
- Improve technical specifications
- Define appropriate contractual and commercial arrangements;
- Ensure alignment between market capabilities and Enexis' requirements.

10. Disclaimer

This summary reflects the aggregated and anonymized results of the market consultation. Individual responses have been consolidated and interpreted at a general level.

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