

# **Demand assessment report for incremental capacity between PEG and ZTPL**

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

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## **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 PEG and ZTPL was from 1 July to 26 August 2019 (COB).

No non-binding demand indications regarding the respective border were received by the TSOs until the publication date of the report.

## **B. Demand assessment**

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

In line with the declining L-gas production from Groningen, the ENTSG TYNDP 2018<sup>1</sup> and the GRIP North West<sup>2</sup> identified projects to convert low calorific gas end consumers towards high calorific gas, both in Belgium and in France.

In their latest respective Ten-Year Development Plan<sup>3</sup> and Ten-Year Indicative Investment Programme<sup>4</sup>, both Fluxys Belgium and GRTgaz detailed an indicative conversion plan for their respective domestic markets. However no need for incremental capacity was identified for the interconnection point Blaregnies L / Taisnieres B. To date no market demand was received indicating the need to reinforce H-gas transmission capacity between the neighbouring countries to compensate reduced L imports.

### **ii. 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.

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<sup>1</sup> ENTSG Ten-Year Network Development Plan 2018 - published on 31 December April 2018

<sup>2</sup> North West Gas Regional Investment Plan 2017 – Published on 4 April 2017

<sup>3</sup> Ten-Year Development Plan for the GRTgaz transmission network 2018-2027 period – published in February 2019

<sup>4</sup> Ten-Year Indicative Investment Programme Fluxys Belgium & Fluxys LNG 2019-2028 - published in February 2019

### **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 project. This doesn't preclude the conclusions of a following demand assessment exercise. Hence, for the entry-exit-systems addressed by this report neither 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 start after the yearly capacity auction in 2021, unless triggered earlier by non-binding demand indications.

### **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 GRTgaz nor Fluxys Belgium introduced a fee for the evaluation and processing of non-binding demand indications.



## G. Contact information

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