

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 ENTSOG TYNDP 2018¹ and the GRIP North West² 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 Plan³ and Ten-Year Indicative Investment Programme⁴, 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.

¹ ENTSOG Ten-Year Network Development Plan 2018 - published on 31 December April 2018

² North West Gas Regional Investment Plan 2017 – Published on 4 April 2017

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

⁴ 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.



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