

Demand Assessment Report for incremental capacity between France market area (PEG) and BeLux market area (ZTP)

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

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1. Non-binding demand indications

In line with Art. 26 of Network Code on Capacity Allocation Mechanism (CAM NC) - Regulation (EU) 2017/459, the transmission systems operators (TSOs) 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 submission period ran from July 7th to September 1st on both sides of the border between PEG and ZTP.

Within this period, no non-binding demand indications regarding the respective border were received by the TSOs.

Any non-binding demand indications received after the deadline will be considered in the next market demand assessment report.

2. Demand assessment

2.1 Historical usage pattern

As stated above, for the incremental capacity cycle addressed by this report, the TSOs received zero non-binding market demand indications. Therefore, an analysis of the historical capacity utilization between the respective entry-exit systems to support the assessment of the demand for incremental capacity is not necessary.

2.2 Relations to GRIPs, TYNDP, NDPs

None of the relevant GRIPs, TYNDP or NDPs identified a need for incremental capacity. This conclusion was further confirmed by the market which did not submit any non-binding market demand indications.

2.3 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.

Bearing in mind the elements mentioned above, no demand for incremental capacity has been identified, either from market indications or from other sources.

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

According to the assessment result of the non-binding demand indications, no grounds have been identified at this stage to consider the initiation of an incremental capacity project. This doesn't prevent future demand assessments from reaching different conclusions.

Consequently, no incremental capacity project/process or technical studies will be conducted for the entry-exit systems addressed by this report.

4. Provisional timeline

For the time being no incremental project will be initiated.

According to the current legal situation, the next incremental capacity process will start in 2027 after the yearly capacity auctions, unless triggered earlier by non-binding demand indications.

5. Interim arrangements for the auction of existing capacity on the concerned IP(s)

Given that no incremental project will be initiated based on this market demand assessment, interim arrangements are not required for the time being.

6. Fees

For the incremental capacity cycle addressed in this report, neither NaTran nor Fluxys Belgium introduced a fee for the evaluation and processing of non-binding demand indications. The decision on this matter for one specific incremental capacity cycle has no significance on any following cycles.

7. Contact Information

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