

**Demand Assessment Report
for incremental capacity
between TTF (NL) and ZTPL (BE)
market areas**

October 2023

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

Gasunie Transport Services B.V.

Concourslaan 17
9727 KC Groningen
The Netherlands

Fluxys Belgium NV

Kunstlaan 31
B-1040 Brussel
Belgium

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A. Non-binding Demand indications

In line with Art. 26 of Regulation (EU) 2017/459, the transmission systems operators (TSO's) 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 the Dutch side ran from July 5 to August 30 and on the Belgian side from July 3 to August 28.

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

Upon request of the market, Gasunie Transport Services BV (hereinafter GTS) has offered the service Surrender of Capacity (SOC) within the market demand assessment of incremental capacity. In this way a single overview of demand and supply could be obtained. However, no market party has submitted offers for this service.

B. Demand assessment

i. Historical usage pattern at interconnection points between TTF and ZTPL market areas

As stated above, for the incremental capacity cycle addressed by this report, no non-binding market demand indications were received. 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.

ii. 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 not submitting any non-binding market demand indications.

iii. Expected amount, direction and duration of demand for incremental capacity

Bearing in mind the elements mentioned above, there is no demand for incremental capacity identified stemming either out of market indications or other sources.

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. Hence, for the entry-exit-systems

addressed by this report no incremental capacity project/process nor technical studies will be initiated.

D. Provisional timeline

For the time being no incremental project will be initiated. The next expected incremental process will start after the yearly capacity auction in 2025.

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 Gasunie Transport Services 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.

G. Contact information

Manasseh Struijck
Department Commerce and Regulation

Gasunie Transport Services B.V.
Concourslaan 17
9727 KC Groningen
The Netherlands
Tel.: +31 (0)50/5213333
Email: incremental@gastransport.nl

Ilse Guedens
Marketing Manager

Fluxys Belgium NV
Kunstlaan 31
B-1040 Brussel
Belgium
Tel.: +32 2 282 77 77
Email: marketing@fluxys.com