







**Demand assessment report
for the incremental capacity process
starting 2025
between TTF and the German market area
Trading Hub Europe where no non-binding
demand indications were received**

2025-10-27

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 their potential demand for incremental capacity. The period for submission on the Dutch side (TTF) ran from July 8 to September 1 and on the German side (THE) from July 7 to September 1.

Within this period no non-binding demand indications regarding the respective border were received by the TSOs. If non-binding requests for new capacity are received after the deadline, they will be taken into account in the next Market Demand Assessment report (2027-2029 cycle), according to the current legal situation, provided they are still valid.

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. One market party has offered a non-binding SOC for TTF-THE. For the IC process this SOC has had no effect given the fact there were no non-binding demand indications for the respective border.

B. Demand assessment

i. Historical usage pattern

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 TYNDP and NDPs

As there is no non-binding market demand, any physical supply gaps from the TYNDP or the national network development plan cannot be closed via the process according to chapter 5 NC CAM, but must be taken into account in the respective processes.

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

Considering the elements mentioned in section A and B of this report, at this stage no ground is identified to consider starting an incremental capacity project. This does not preclude conclusions of the following demand assessment exercise. Hence, for the entry-exit-systems addressed by this report no incremental capacity project 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 2027.

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

For the time being, no incremental project will be initiated. According to the current legal situation, the next market demand analysis will start in 2027 after the auction of the annual capacities.

F. Fees

Within the framework of the procedure on which this report is based, no fees were charged by any of the TSOs involved for the submission of non-binding demands, as there are no non-binding market demands.

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