

**Demand assessment report
for the incremental capacity process
starting 2025
between the BeLux market area (ZTP) 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

Fluxys Belgium NV

Kunstlaan 31
B-1040 Brussel
Belgium



Fluxys TENP GmbH

Elisabethstraße 5
40217 Düsseldorf
Germany



GASCADE Gastransport GmbH

Kölnische Str. 108-112
34119 Kassel
Germany



Open Grid Europe GmbH

Kallenbergstr. 5
45141 Essen
Germany



Thyssengas GmbH

Emil-Moog-Platz 13
44137 Dortmund
Germany



Creos Luxembourg S.A.

105, rue de Strassen
L-2555 Luxembourg
Luxembourg



Table of contents

A. Non-binding Demand indications.....	4
B. Demand assessment	4
i. Historical usage pattern.....	4
ii. Relations to GRIPs, TYNDP, NDPs	4
iii. Expected amount, direction and duration of demand for incremental capacity.....	4
C. Conclusion for the (non)-initiation of an incremental capacity project	4
D. Provisional timeline.....	5
E. Interim arrangements for the auction of existing capacity on the concerned IP(s).....	5
F. Fees	5
G. Contact information	6

A. 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 (COB) on both sides of the border between the BeLux market area (ZTP) and the German market area (THE).

Within this period no non-binding demand indications regarding the respective border were received by the TSOs on either side of the border.

Any non-binding demand indications received after the deadline 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.

B. Demand assessment

i. 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.

ii. Relations to TYNDP, 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, no demand for incremental capacity has been identified, either from market indications or from 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 doesn't preclude the conclusions of a 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. According to the current legal situation, the next market demand analysis will start in 2027 after the auction of the annual capacities.

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

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.

G. Contact information

Fluxys Belgium NV

Ilse Guedens
Kunstlaan 31
B-1040 Brussel
Belgium

Tel.: +32 2 282 77 77

marketing@fluxys.com



Fluxys TENP GmbH

Daniel Schlesiger
Elisabethstraße 5
40217 Düsseldorf
Germany

Tel.: +49 (0)211 420909-0

info.fluxystenp@fluxys.com



GASCADE Gastransport GmbH

Umut Aydin
Kölnische Str. 108-112
34119 Kassel
Germany

Tel.: +49 561 934-1565

kontakt@gascade.de



Open Grid Europe GmbH

Johannes Lambertz
Kallenbergstr. 5
45141 Essen
Germany

Tel: +49(0) 201 3642 12222

gastransport@oge.net



Thyssengas GmbH

Andreas Martens
Emil-Moog-Platz 13
44137 Dortmund
Germany

Tel.: +49 (0) 231 91291 5623

incremental_capacity@thyssengas.com



CREOS Luxembourg S.A.

Jean-François Schneiders
105, rue de Strassen
L-2555 Luxembourg
Luxembourg

Tel.: +352 2624 2624

info@creos.net

