

Demand assessment report
for the incremental capacity process
starting 2025 between France
market area and the German market
area Trading Hub Europe

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

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The logo for NaTran, featuring the word "naTran" in a bold, yellow, sans-serif font. The "na" is lowercase and the "Tran" is uppercase.The logo for NaTran Deutschland, featuring the word "naTran" in a bold, yellow, sans-serif font, with "DEUTSCHLAND" in a smaller, yellow, sans-serif font below it.The logo for Open Grid Europe (OGE), featuring a stylized blue icon of a power grid or network, followed by the letters "OGE" in a bold, blue, sans-serif font.

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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 France market area (PEG) and the German market area Trading Hub Europe (THE) was from 07 July to 01 September 2025.

Within this period no non-binding demand indications regarding the respective borders were received by the TSOs. Non-binding demand indications received after the deadline will be considered 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 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 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/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 market demand analysis will start after the yearly capacity auction in 2027.

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

Since 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

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The NaTran logo consists of the word "naTran" in a bold, sans-serif font. The letters "na" are in a lighter yellow, while "Tran" is in a darker yellow. The "T" is stylized with a horizontal bar that extends to the left.The NaTran Deutschland logo features the word "naTran" in the same stylized yellow font as the first logo, with "DEUTSCHLAND" in a smaller, all-caps, sans-serif font directly beneath it.The OGE logo features a blue circular icon on the left, composed of two interlocking, stylized 'C' shapes. To the right of the icon, the letters "OGE" are written in a bold, blue, sans-serif font.