

**Demand assessment report
for the incremental capacity process
starting 2023
between France market area PEG
and the German market area Trading Hub
Europe where no non-binding demand
indications were received**

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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 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 03 July 2023 to 28 August 2023 (COB).

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 (2025-2027 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

In the wake of the Russian invasion of Ukraine, German National Development Plan 2022 (NEP 2022), GRTgaz's Network development plan 2022 and TYNDP 2022 (non-binding) identified a project to create firm capacity from France to Germany from 100 GWh/d (NEP 2022) to 200 GWh/d (TYNDP 2022 – project promoter are GRTgaz SA and GRTgaz Deutschland GmbH).

We want to point out, that the NEP 2022 is only a draft version without a final confirmation of the BNetzA. Furthermore the FID of the project depends on several conditions (please see page 207 of the NEP 2022 Draft).

We want to stress, that these projects are 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 out of market indications

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. 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.

This finding applies to the current process for new capacity to be created. In the future, this result may well be different.

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 2025 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, no project to create new capacity will be initiated. Therefore, no interim arrangements are 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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