

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

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 regarding natural gas. The period for submission on both sides of the border between the Austrian market area East 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 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.

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 utilisation 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 V 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/process

Considering the elements outlined in sections A and B of this report, at this stage no reasons identified to initiate an incremental capacity project. This does not 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

As no incremental project will be initiated a provisional timeline is not provided. 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)

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.

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