

Demand assessment report for hydrogen transmission capacity at the Ruse/Giurgiu interconnection point

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This report is an assessment of the potential for incremental capacity projects conducted by:

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A. Non-binding demand indications

Transgaz has launched a non-binding market demand survey on hydrogen capacity demand for interconnection points and invited all the Network Users to fill in the non-binding incremental capacity survey, which was available on Transgaz's website. The period for submission was between 25th July and 01st September 2025. TRANSGAZ has received non-binding demand indication for firm hydrogen transmission capacity at the Ruse/Giurgiu interconnection point envisaged between the entry-exit system of TRANSGAZ and the entry-exit system of Bulgartransgaz.

Demand requested from Transgaz:

From "EXIT CAPACITY"	To "ENTRY CAPACITY"	Gas year	Amount [Please indicate unit: (kWh/h)/y]	Request is submitted to other TSOs [yes, TSO] or [no] (detailed information shall be provided below)	Period when Demand Indication was received 25.07.2025.- 01.09.2025	Additional Information (e.g. type of capacity, if different from bundled firm freely allocable)
Bulgaria	Romania y	2029/30- 2046/47	173 880 (2029/30..2033/34) 248 400 (2034/35..2038/39) 414 000 (2039/40..2050/51)	Yes	25.07.2025.- 01.09.2025	-

B. Demand assessment

Transgaz conducted this market survey procedure in the above mentioned period and gave network users the opportunity to submit non-binding demand indications referred to future prospective hydrogen transmission IP to quantify potential demand for incremental capacity.

The Demand Assessment Phase commenced immediately after the non-binding market survey closed.

i. Historical usage pattern

Ruse/Giurgiu hydrogen interconnection point (IP) is not an existing network point hence the historical usage pattern here is not available.

ii. Results of current annual yearly auction

Currently there is no regulation related to hydrogen demand survey.

iii. Relations to TYNDP, NDPs

The project Hydrogen transmission line in the Giurgiu-Podișor-Bibeuști-Jupa-Horia-Nădlac direction is included in the National gas Transmission System TYNDP 2024-2033, was found in ENTSG TYNDP 2024 (H2T-A-1014).

The project involves the construction of a new hydrogen pipeline along the Giurgiu - Podișor - Bibeuști - Jupa - Horia - Nădlac corridor. The project connects future hydrogen systems in Bulgaria, Romania and Hungary and enables the creation of the hydrogen market and cross-border hydrogen trade. The project will be part of the South East Europe Hydrogen Corridor (SEEHyC), which provides hydrogen deliveries on the route Greece > Bulgaria > Romania > Hungary > Slovakia > Czech Republic > Germany to the EU market and will also be available for reverse flow.

iv. Expected amount, direction and duration of demand for incremental capacity

Transgaz has received the above mentioned non-binding capacity indications in 2025 according to point A.

C. Next steps and provisional timeline

Conclusion for the next steps. Transgaz will study further the RO/BG hydrogen interconnection and the activities on establishing RO/BG hydrogen interconnection will continue.

For the moment, no incremental capacity projects will be initiated. Transgaz will work further with the submitted demand and the ENTSOG TYNDP 2026 scenarios data. The next incremental capacity survey will start after the 2027 annual capacity auction.

D. Contact information

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