

Demand assessment report for incremental capacity between Romania and Bulgaria

October 2025

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

SNTGN TRANSGAZ SA

BULGARTRANSGAZ EAD

Address

Address

Piata C. I. Motas, Nr. 1

Blvd. Pancho Vladigerov 66

551130, Medias Jud.

Lyulin 2, CP 3, 1336 Sofia

Sibiu, Romania

Bulgaria

General contact information

General contact information

telephone +4 0269 80 33 33

telephone + 359/2/939 63 00

email: cabinet@transgaz.ro

email: info@bulgartransgaz.bg

fax: +4 0269 83 90 29

Fax: + 359/2/925 00 63

Table of contents

A. Non-binding demand indications	4
B. Demand assessment	4
C. Conclusion for the initiation/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	5

A. Non-binding demand indications

The IPs Ruse (BG)/Giurgiu(RO) and Negru Voda 1 (RO)/Kardam (BG) connect the high-pressure Romanian and Bulgarian entry-exit natural gas systems.

Technical capacities existing as of 1 October 2025:

IP name	Negru Voda 1/Kardam (BG>RO) kWh/d/y	Negru Voda 1/Kardam (RO>BG) kWh/d/y
Transgaz physical capacity	158.870.972	189.505.164
Bulgartransgaz physical capacity	158.870.972	216.527.712

IP name	Ruse/Giurgiu (BG>RO) kWh/d/y	Ruse/Giurgiu (RO>BG) kWh/d/y
Transgaz physical capacity	27.505.962	44.140.028
Bulgartransgaz physical capacity	26.818.276	43.373.473

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 the Romanian entry-exit system and the Bulgarian entry-exit system was from 7th July to 1st September 2025. Within this period, no non-binding demand indications regarding the respective border were received by the TSOs.

B. Demand assessment

The Demand Assessment Phase commenced immediately after the start of the annual yearly capacity auction, as specified in Article 11(4) of the Commission Regulation (EU) 2017/459 and closes maximum 16 weeks after the annual yearly capacity auction in accordance with Article 26 of the Commission Regulation (EU) 2017/459.

The transmission systems operators conducting this market demand assessment procedure run from 7th July up to 1st September 2025 gave network users the opportunity to submit non-binding demand indications to quantify potential demand for incremental capacity.

Capacity information on the IP Ruse (BG)/Giurgiu(RO) and Negru Voda 1 (RO)/Kardam (BG) in general is available on the websites of both TSOs and is also published on ENTSOG's Transparency Platform (ENTSOG - TP), relevant EIC codes: 21Z000000000159I for Negru Voda 1 (RO)/Kardam (BG) and 21Z0000000002798 for Ruse (BG)/Giurgiu(RO).

C. Conclusion for the (non)-initiation of an incremental capacity project

According to the assessment result of the non-binding demand indications under point B, no demand levels for incremental capacity need to be developed, currently no incremental capacity project will be initiated.

Based on the aforementioned decision, no technical studies for incremental capacity projects will be conducted.

D. Provisional timeline

For the time being no incremental project will be initiated neither on the Romanian nor on the Bulgarian side.

Market Demand Assessment will be, according to Article 26 of the Commission Regulation (EU) 2017/459, performed on a regular basis. The next incremental capacity cycle will start after the annual yearly capacity auction in 2027.

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

In case of interim arrangements or other limitations, respective provisions of Regulation (EU) 2017/459 shall apply.

F. Fees

For the incremental capacity cycle addressed by this report, Transgaz did not introduce a fee for the assessment and processing of non-binding demand indications.

For the incremental capacity cycle addressed by this report, Bulgartransgaz did not introduce a fee for the assessment and processing of non-binding demand indications.

G. Contact information

SNTGN TRANSGAZ SA

Chelet Valentin

Transmission Capacity Management
Department

Telephone: +4/0269/803124

Email: valentin.chelet@transgaz.ro

Piața C.I Motaș nr. 1,
551130, jud. Sibiu, Romania

BULGARTRANSGAZ EAD

Nikola Delev

Acting Director “Strategic Planning
and Development”

Telephone: + 359/2/939 66 74

Email: Nikola.Delev@bulgartransgaz.bg

Blvd. Pancho Vladigerov 66
Lyulin 2, CP 3, 1336 Sofia, Bulgaria