



Demand assessment report for incremental capacity between Romania and Ukraine

October 2025

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

SNTGN TRANSGAZ SA

LLC Gas TSO of Ukraine

Address

Address

1, C. I. Motas Square

44 Liubomyra Huzara Ave

551130, Medias, Sibiu county

03065, Kyiv, Ukraine,

Romania

Ukraine

General contact information

General contact information

Phone: +4 0269 80 33 33

Phone: + 380 44 239 77 77

email: cabinet@transgaz.ro

email: commercial@tsoua.com

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 IP Isaccea 1 / Orlovka 1, connects the high-pressure Romanian and Ukrainian entry-exit natural gas systems.

Technical capacities existing as of 1 October 2025:

IP name	Isaccea 1 / Orlovka 1 (RO>UA)		Isaccea 1 / Orlovka 1 (UA>RO)	
	m3/day/year (0°C)	kWh/day/year (25°C/0°C)	m3/day/year (0°C)	kWh/day/year (25°C/0°C)
Maximum technical capacity	10 709 950	121 421 209	17 776 800	201 882 585

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 Ukrainian 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 Isaccea 1 / Orlovka in general is available on the websites of both TSOs and is also published on ENTSO-G's Transparency Platform (ENTSO-G – TP), relevant EIC code: 21Z000000000304Z.

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 Ukrainian 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, LLC Gas TSO of Ukraine did not introduce a fee for the assessment and processing of non-binding demand indications.

G. Contact information

SNTGN TRANSGAZ SA

LLC Gas TSO of Ukraine

Chelet Valentin

Andrii Yefanov

Transmission Capacity
Management Department

Division of Cooperation with Clients

Phone: +4 0269 80 3124

Phone: +38 044 298 69 56

Email: valentin.chelet@transgaz.ro

Email: yefanov-av@tsoua.com

1, C. I. Motas Square

44 Liubomyra Huzara Ave

551130, Medias, Sibiu county

03065, Kyiv, Ukraine,

Romania

Ukraine