



Demand assessment report for submitted non-binding hydrogen capacity demand referred to future exit and entry points to FGSZ

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This report is the FGSZ's assessment of the potential future hydrogen capacity demand conducted by

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A. Non-binding Demand indications

FGSZ launched a non-binding market survey on the hydrogen capacity requirements of domestic network points and cross-border connection points. FGSZ Ltd. asked prospective system users to complete the non-binding capacity survey, which was published on the FGSZ website between July 7 and September 1, 2025, along with a call for submissions. FGSZ received the following non-binding hydrogen capacity demand forecasts from applicants at domestic network points and cross-border connection points specified by the applicants.

FGSZ's Non-Binding Firm Hydrogen Capacity Demand Survey result

GCV reference parameter 25°C/0°C

Indicated entry and exit point		2030/31	2040/41	2050/51
Aggregated domestic consumer exit demand	kWh/h/year	453 880	1 020 801	1 020 801
	TWh/year	3,946	8,546	7,953
Aggregated domestic producer entry demand	kWh/h/year	76 800	76 800	76 800
	TWh/year	0,673	0,673	0,673
Aggregated Balassagyarmat SK>HU entry total*	kWh/h/year	243 880	810 801	810 801
	TWh/year	2,136	7,103	7,103
Aggregated Balassagyarmat HU>SK exit total	kWh/h/year	6 800	6 800	6 800
	TWh/year	0,060	0,060	0,060
Aggregated Beregdaróc UA>HU entry total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Beregdaróc HU>UA exit total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Csanádpalota RO>HU entry total*	kWh/h/year	173 880	740 801	740 801
	TWh/year	1,523	6,489	6,489
Aggregated Csanádpalota HU>RO exit total	kWh/h/year	6 800	6 800	6 800
	TWh/year	0,060	0,060	0,060
Aggregated Drávaszerdahely HR>HU entry total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Drávaszerdahely HU>HR exit total	kWh/h/year	0	0	0

	TWh/year	0	0	0
Aggregated Kiskundorozsma RS>HU entry total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Kiskundorozsma HU>RS exit total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Mosonmagyaróvár AT>HU entry total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Mosonmagyaróvár HU>AT exit total	kWh/h/year	0	0	0
	TWh/year	0	0	0
Aggregated Tornyiszentmiklós SI>HU entry total*	kWh/h/year	173 880	740 801	740 801
	TWh/year	1,523	6,489	6,489
Aggregated Tornyiszentmiklós HU>SI exit total	kWh/h/year	6 800	6 800	6 800
	TWh/year	0,060	0,060	0,060

* The border points demand overlap to some extent, as applicants plan to use import entry depending on the development of the hydrogen backbone network and the availability of imported hydrogen sources.

B. Demand assessment

The demand assessment phase began immediately after the completion of the non-binding demand survey. The main purpose of the survey was to obtain direct information about hydrogen demand from future users of the hydrogen network. We received non-binding demand statements from future exit point users and prospective producers. The table above represents a summary of the demand.

i. Historical usage pattern

None of the domestic network points and hydrogen interconnection point (IP) is an existing network point hence the historical usage pattern here is not available.

ii. Regulatory background of current market survey

Currently there is no regulation related to hydrogen demand survey.

iii. Relations to EU wide Ten Years Network Development Plan (TYNDP), National Development Plan (NDP)

FGSZ will elaborate and submit to the NRA a hydrogen system development proposal that considers the submitted requested demand and the considerations drawn from them. FGSZ has ongoing discussions with the neighbouring network operators about the submitted cross-border demand and next steps.

iv. Expected amount, direction and duration of demand for exit and entry capacities.

The demands for 2030/31, 2040/41, and 2050/51 are highlighted in this assessment, but some applicants would like to start hydrogen consumption and production as early as 2028/2029. Based on the aggregate domestic demand at the point of consumption, significant hydrogen imports can be expected.

Hungarian end users and producers showed stable demand until 2050 after a transitional ramp-up period lasting until 2040. Based on ENTSOG studies considering certain demand and supply scenarios of ENTSOG TYNDP 2024, an increasing hydrogen flow is expected in Hungary and through the expected hydrogen interconnections between 2030 and 2050.

C. Provisional timeline

Project proposals for TYNDP 2026 can be submitted to ENTSOG between September 29 and October 25, 2025. The domestic ten-year development proposal (NDP) was submitted to the NRA in September 2025.

E. Contact information

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