



**Demand assessment report
for submitted capacity referred to hydrogen
transmission between
*Transgaz and FGSZ Ltd.***

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

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A. Non-binding Demand indications

Involved TSOs have launched a non-binding market demand survey on hydrogen capacity demand for interconnection points. TSOs, invited all the Network Users to fill in the non-binding incremental capacity survey, which was available on the TSOs' websites. The period for submission on Hungarian side was between 7th July to 01st September 2025, whereas on Romanian side from 25th July and 01st September 2025. The involved TSOs, TRANSGAZ and FGSZ have received non-binding demand indication for firm hydrogen transmission capacity at the envisaged interconnection points between the entry-exit system of TRANSGAZ and the entry-exit system of FGSZ.

Demand requested from FGSZ:

From	To	Gas year	Amount [Please indicate unit: (kWh/h)]	Request is submitted to other TSOs [yes, TSO] or [no] (detailed in- formation shall be pro- vided below)	Period when De- mand Indication was received 07.07.2025.- 15.09.2025	Additional Infor- mation (e.g. type of ca- pacity, if different from bundled firm freely allocable)
“EXIT CAPACITY”	“ENTRY CA- PACITY”					
Romania	Hungary	2029/30- 2050/51	173 880 (2029/30..2033/34) 248 400 (2034/35) 575 201 (2036/37...2038/39) 740 801 (2039/40...2050/51)	Yes, partially	07.07.2025.- 01.09.2025	-

From	To	Gas year	Amount [Please indicate unit: (kWh/h)]	Request is submitted to other TSOs [yes, TSO] or [no] (detailed information shall be provided below)	Period when Demand Indication was received	Additional Information (e.g. type of capacity, if different from bundled firm freely allocable)
<i>Hungary</i>	<i>Romania</i>	<i>2029/30-2050/51</i>	6800 (2029/30... 2050/51)	-	<i>07.07.2025.-01.09.2025</i>	-

Demand requested from Transgaz:

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

B. Demand assessment

The transmission systems operators conducting this market survey procedure in the above-mentioned periods, 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

Csanádpalota/Nadlak 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

IP Csanádpalota/Nadlak was involved in the ENTSG TYNDP 2024 (HYD-A-1259 and HYD-A-1014) as hydrogen project and intends to become a part of hydrogen backbone establishing hydrogen interconnection between the Romanian and Hungarian hydrogen system from 2032 onwards. Project will establish new supply route for hydrogen and will connect the two neighbouring countries Romania and Hungary and it will be the part of South-East European Hydrogen Corridor (SEEHyC) and vital part of the European hydrogen backbone.

Increased interest in domestic hydrogen production and consumption in all related countries is expected since this project will enable access to hydrogen transmission system and allow export and import of hydrogen. Project will establish a new hydrogen IP between Romania and Hungary.

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

TSOs have 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. According to TRANSGAZ and FGSZ's common decision, the TSOs will study further the RO/HU hydrogen interconnection and the activities in regard to establishing RO/HU hydrogen interconnection will continue.

TSOs will work further with the submitted demand and the ENTSOG TYNDP 2026 scenarios data. Project submission towards ENTSOG for TYNDP 2026 is from 29th of September till 26th October 2025. National Development Plans will be updated and submitted to NRAs according to TSOs' decisions.

Further Market Demand survey will be performed in the next years depending on TSOs' decision.

D. Contact information

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