

Demand Assessment Report for incremental capacity at IP Kireevo/Zaychar

October 2025

Market test 2025 - Demand Assessment Report GASTRANS d.o.o. Novi Sad – Bulgartransgaz EAD
IP Kireevo/Zaychar

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

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1 Table of Contents

A. Non-binding Demand Indications	4
B. Demand Assessment.....	5
1. Historical Usage Pattern	5
2. Results of Current Annual Yearly Auction.....	6
3. Expected amount, direction and duration of demand for incremental capacity	7
3.1.1. Gastrans - expected amount, direction and duration of demand for incremental capacity 7	
3.1.2. Bulgartransgaz - expected amount, direction and duration of demand for incremental capacity 7	
C. Conclusion for the (non)-initiation of an incremental capacity project/process	8
D. Expected Timeline.....	8
E. Fees	9
F. Contact information.....	9

A. Non-binding Demand Indications

GASTRANS d.o.o. Novi Sad (hereinafter referred to as “Gastrans”) conducted procedure of assessment of market demand for incremental capacities (hereinafter referred to as “market test”) in line with Article 9 of Gastrans Network Code (hereinafter referred to as NC) and Article 25 of the Decree on Network Rules which Refer to the Calculation and Allocation of Capacities for Transportation of Natural Gas - Official Gazette of Republic of Serbia No. 112/2022. The invitation for submitting non-binding demand indications was published on Gastrans’ website <https://gastrans.rs/market-test-2025/?lang=en> and on the Regional Booking Platform - RBP <https://rbp.eu/#/events> on 7th July 2025.

Bulgartransgaz EAD (hereinafter referred to as “Bulgartransgaz”) launched a market demand assessment process for incremental capacity in July 2025, immediately after the start of the annual yearly capacity auction (7th July 2025), as provided for in Article 26 of Regulation (EU) 2017/459 (CAM NC). The invitation for submitting non-binding demand indications was published on Bulgartransgaz’s website (<https://www.bulgartransgaz.bg/market-test-2025>) on 7th July 2025.

Gastrans and Bulgartransgaz publish this Joint Demand Assessment Report (DAR), which includes the non-binding demand indications for incremental capacity received by the transmission system operators.

Non-binding demand indications received by Gastrans

Within the deadline (1st September 2025) for submitting non-binding demand indications Gastrans received 2 non-binding demand indications expressing the interest for firm incremental capacity at IP Kireevo/Zaychar. Gastrans didn’t receive any non-binding demand indications after the prescribed deadline and Gastrans don’t have any non-binding demand indications which were submitted in the previous market test which should be included in the current DAR.

The non-binding demand indications received by Gastrans are presented in the following table:

Table 1

Gastrans non-binding demand indications for incremental capacity survey 2025	
Interconnection Point	Kireevo/Zaychar
EIC Code	58Z-000000007-KZ
Flow Direction	Bulgartransgaz → Gastrans
Is the request submitted to other TSOs? [yes, TSO name] or [no]	Yes, one of the non-binding demand indications has been submitted to Bulgartransgaz
Current technical capacity, Entry to Gastrans kWh/d	366.731.712
Non-binding demand indications – aggregated [(kWh/d)/y]	
2026/2027	40.704.288
2027/2028	43.704.288
2028/2029	43.704.288
2029/2030	43.704.288
2030/2031	43.704.288
2031/2032	43.704.288
2032/2033	43.704.288
2033/2034	43.704.288
2034/2035	43.704.288
2035/2036	43.704.288

2036/2037	43.704.288
2037/2038	40.704.288
2038/2039	40.704.288
2039/2040	40.704.288
2040/2041	40.704.288

Non-binding demand indications received by Bulgartransgaz

Within the deadline (1st September 2025) for submitting non-binding demand indications Bulgartransgaz received non-binding demand indications expressing the interest for firm incremental capacity at IP Kireevo/Zaychar. Bulgartransgaz didn't receive any non-binding demand indications after the prescribed deadline and there are no non-binding demand indications from the previous market test that should be included in the current DAR.

The non-binding demand indications received by Bulgartransgaz are presented in the following table:

Table 2

Bulgartransgaz non-binding demand indications for incremental capacity survey 2025	
Interconnection Point	Kireevo/Zaychar
EIC Code	58Z-000000007-KZ
Flow Direction	Bulgartransgaz → Gastrans
Is the request submitted to other TSOs? [yes, TSO name] or [no]	Yes, the non-binding demand indication has been submitted to Gastrans
Current technical firm capacity, Bulgartransgaz (exit) in kWh/d	407.436.000
Current available technical firm capacity, Bulgartransgaz (exit) in kWh/d	86.898.000
Non-binding demand indications – aggregated [(kWh/d)/y]	
2027/2028	3.000.000
2028/2029	3.000.000
2029/2030	3.000.000
2030/2031	3.000.000
2031/2032	3.000.000
2032/2033	3.000.000
2033/2034	3.000.000
2034/2035	3.000.000
2035/2036	3.000.000
2036/2037	3.000.000

B. Demand Assessment

1. Historical Usage Pattern

The IP Kireevo/Zaychar has been in commercial operation since January 1, 2021. The operator of the IP Kireevo/Zaychar in the Republic of Bulgaria is Bulgartransgaz and the operator in the Republic of Serbia is Gastrans.

IP Kireevo/Zaychar technical capacity – exit from Bulgartransgaz

The total exit technical capacity at IP Kireevo/Zaychar from Bulgartransgaz transmission system to Gastrans transmission system amounts to 407.436.000 KWh/d. The existing available technical firm capacity in this direction is 86.898.000 KWh/d.

The historical usage data of IP Kireevo/Zaychar on the side of Bulgartransgaz is available on the ENTSOG Transparency Platform and is also available from the website of Bulgartransgaz. The relevant IP EIC code is 58Z-000000007-KZ.

IP Kireevo/Zaychar technical capacity - entry to Gastrans

The total technical capacity on entry to Gastrans at IP Kireevo/Zaychar is 15.280.488 kWh/h i.e. 366.731.712 kWh/day (35,26 mcm/day/y at 293,15 K (=20°C) and 101,325 kPa (=1,01325 bar (absolute) for real dry gas.)

Capacity amounting 13.554.417 kWh/h is exempted and it is contracted on the long-term basis. The rest of the technical capacity, amounting 1.726.071 kWh/h, is offered on the short-term basis in accordance with capacity allocation mechanism through the auctions on the RBP.

The historical usage of IP Kireevo/Zaychar on entry to Gastrans is available on Gastrans website: http://gedp.gastrans.rs/gas_flow.aspx

2. Results of Current Annual Yearly Auction

Results of Current Annual Yearly Auction – Bulgartransgaz

In the annual yearly firm capacity auction held on the Regional Capacity Platform (RBP) on 07.07.2025, Bulgartransgaz offered for contracting firm capacity in the amount of 49.101.200 KWh/d at IP Kireevo/Zaychar in the Bulgartransgaz → Gastrans direction. The booked capacity is in the amount of 2 160 000 kWh/d.

Results of Current Annual Yearly Auction - Gastrans

In accordance with article 6.2.1. of NC, Gastrans offers for contracting Firm Yearly Capacity when firm long-term capacity from the Long-Term Gas Transportation Agreements becomes available for contracting on the basis of surrender, cessation of the Long-Term Gas Transportation Agreement(s) and in case from the Article 9.4 of the NC.

Due to the cessation of one Long-Term Gas Transportation Agreement, Gastrans offered capacity released from terminated Long-Term Gas Transportation Agreement (197.813 kwh/h/y) on the annual firm yearly capacity auction for gas years 2023/24 and 2024/2025.

At the annual firm yearly capacity auction for gas year 2025/2026 Gastrans didn't offer any firm yearly capacity.

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

3.1.1. Gastrans - expected amount, direction and duration of demand for incremental capacity

Within received non-binding demand indications:

- one of them indicated demand for firm incremental capacity at IP Kireevo/Zaychar and exit point IP Serbia in the same volumes.
- one of them indicated demand for firm incremental capacity at IP Kireevo/Zaychar.

Considering the fact that Gastrans doesn't offer for contracting firm yearly capacity, non-binding demand indications exceed the available firm yearly capacity in each year for which the non-binding demands were submitted.

The assessment of the non-binding demand indications is presented in the table below.

Table 3

Gastrans demand assessment for incremental capacity	
Interconnection Point	Kireevo/Zaychar
EIC Code	58Z-000000007-KZ
Flow Direction	Bulgartransgaz → Gastrans
Is the request submitted to other TSOs? [yes, TSO name] or [no]	Yes, one of the non-binding demand indications has been submitted to Bulgartransgaz
Current technical capacity, Entry to Gastrans kWh/d	366.731.712
Assessment of demand for incremental capacity [(kWh/d)/y]	
2026/2027	40.704.288
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2033/2034	43.704.288
2034/2035	43.704.288
2035/2036	43.704.288
2036/2037	43.704.288
2037/2038	40.704.288
2038/2039	40.704.288
2039/2040	40.704.288
2040/2041	40.704.288

3.1.2. Bulgartransgaz - expected amount, direction and duration of demand for incremental capacity

The received non-binding demand indication for incremental capacity by Bulgartransgaz is for 10 consecutive gas years, covering the period from 2027/2028 to 2036/2037 at IP Kireevo/Zaychar in the Bulgartransgaz → Gastrans direction.

The assessment of the non-binding demand indications is presented in the table below.

Table 4

Bulgartransgaz demand assessment for incremental capacity	
Interconnection Point	Kireevo/Zaychar
EIC Code	58Z-000000007-KZ
Flow Direction	Bulgartransgaz → Gastrans
Is the request submitted to other TSOs? [yes, TSO name] or [no]	Yes, the non-binding demand indication has been submitted to Gastrans
Current available technical firm capacity, Bulgartransgaz (exit) in kWh/d	86.898.000
Assessment of demand for incremental capacity [(kWh/d)/y]	
2027/2028	3.000.000
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2030/2031	3.000.000
2031/2032	3.000.000
2032/2033	3.000.000
2033/2034	3.000.000
2034/2035	3.000.000
2035/2036	3.000.000
2036/2037	3.000.000

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

Gastrans

Gastrans will proceed to the next phase of the Incremental Capacity process and start the Design Phase, the day after the publication of this Demand Assessment Report, in order to offer incremental capacity products at IP Kireevo/Zaychar.

Bulgartransgaz

The indicated demand for incremental capacity received by Bulgartransgaz is lower than the existing available firm technical capacity in the Bulgartransgaz → Gastrans direction on the Bulgarian side of the IP. Thus, it is sufficient to fully meet the expected demand level indicated by market participants to Bulgartransgaz for the entire period. Bulgartransgaz has decided not to proceed to the next phase of the Incremental Capacity Process for IP Kireevo/Zaychar. As a result, no incremental capacity project will be initiated on the Bulgarian side of the IP and no technical studies will be conducted.

D. Expected Timeline

Gastrans plans to conduct the technical studies and the consultation of the draft Project Proposal according to the following indicative timeline:

Activity	Expected start	Expected end	Expected duration
Drafting of project of incremental capacities	From the publication of this Demand Assessment Report	20.01.2026	12 weeks
Public Consultation on draft Project Proposal	20.01.2026	21.03.2026	2 months

After the conclusion of public consultation, draft of incremental capacities project shall be submitted to the respective National Regulatory Authority - NRA(s).

Within 6 months of receipt of the complete project proposal by the last of the relevant NRA(s), those NRA(s) shall publish coordinated decision(s) on the project proposal.

Upon the publication of the decision(s) of the relevant NRA(s) pursuant to previous paragraph and no later than 2 months before the offer of incremental capacity in the annual yearly capacity auction, a notice including the following minimum information shall be published by the TSO(s):

1. the information defined in project of incremental capacities as approved by the NRA(s);
2. a template of the contract(s) related to the capacity offered.

After conducting above mentioned steps, the incremental capacity on Gastrans' side of the IP will be offered as a bundled product with existing capacity on the Bulgartransgas' side of the IP in the auction for firm yearly capacity in accordance with ENTSOG auction calendar (first Monday in July 2027).

E. Fees

Gastrans did not introduce a fee for the evaluation and processing of non-binding demand indications.

Bulgartransgaz did not introduce a fee for the evaluation and processing of non-binding demand indications.

F. Contact information

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