Demand assessment report regarding hydrogen transmission between *Plinovodi d.o.o.* and *Plinacro Ltd.*

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This report is a joint assessment conducted by

Plinovodi d.o.o.

Cesta Ljubljanske brigade 11b

1000 Ljubljana

Slovenia

+386 1 5820 700

Info@plinovodi.si

Plinacro Ltd.

Savska cesta 88a

10000 Zagreb

Croatia

+ 385 1 6301 777

market@plinacro.hr

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A. Non-binding Demand indications

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 referred to hydrogen transmission. The period for submission was from 7 July to 1 September 2025. Within this period, non-binding demand indications for hydrogen transmission regarding the respective border were received by both TSOs.

The following table show indications of non-binding demand for firm capacity referred to hydrogen transmission received by Slovenian TSO Plinovodi within the 8 weeks above:

From **[entry-exit system name]** **"EXIT CAPACITY"**	**To** **[entry-exit system name]** **"ENTRY CAPACITY"**	**Gas year** **[yyyy/yy]**	**Amount** **(kWh/day)/y)** **(GCV:3,54 kWh/Nm3 (0°C))**	**Request is submitted to other TSOs** **[yes, TSO] or [no] (detailed information shall be provided below)**	**Additional Information** **(e.g. type of capacity, if different from bundled firm freely allocable)**
Plinacro	***Plinovodi***	*2029/30*	*4.173.120*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2030/31*	*4.173.120*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2031/32*	*4.173.120*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2032/33*	*4.173.120*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2033/34*	*4.173.120*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2034/35*	*5.961.600*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2035/36*	*5.961.600*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2036/37*	*5.961.600*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2037/38*	*5.961.600*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2038/39*	*5.961.600*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2039/40*	*9.936.000*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*20NN/NN+1*	*9.936.000*	*Yes*	*Bundled*
Plinacro	***Plinovodi***	*2049/50*	*9.936.000*	*Yes*	*Bundled*

The following table show indications of non-binding demand for firm capacity referred to hydrogen transmission received by Croatian TSO Plinacro within the 8 weeks above:

From **[entry-exit system name]** **“EXIT CAPACITY”**	**To** **[entry-exit system name]** **“ENTRY CAPACITY”**	**Gas year** **[yyyy/yy]**	**Amount** **(kWh/day)/y)** **(GCV:3,54 kWh/Nm3 (0°C))**	**Request is submitted to other TSOs** **[yes, TSO] or [no] (detailed information shall be provided below)**	**Additional Information** (e.g. type of capacity, if different from bundled firm freely allocable)
Plinacro	*Plinovodi*	*2029/30*	*4.173.120*	*Yes/No**	*Bundled*
Plinacro	*Plinovodi*	*2030/31*	*8.351.568*	*Yes/No*	*Partly bundled**
Plinacro	*Plinovodi*	*2031/32*	*8.351.568*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2032/33*	*8.351.568*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2033/34*	*14.973.120*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2034/35*	*16.761.600*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2035/36*	*16.761.600*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2036/37*	*16.761.600*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2037/38*	*16.761.600*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2038/39*	*16.761.600*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2039/40*	*20.736.000*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*2040/41*	*20.736.000*	*Yes/No*	*Partly bundled*
Plinacro	*Plinovodi*	*20NN+1/NN+1*	*9.936.000*	*Yes/No*	*Bundled*
Plinacro	*Plinovodi*	*2049/50*	*9.936.000*	*Yes/No*	*Bundled*

** one participant sent its demand interest both to Plinacro and Plinovodi, second only to Plinacro*

B. Demand assessment

The transmission systems operators have been conducting this market survey procedure run from 7th July up to 1st September 2025 gave the 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

Rogatec 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

Project HR-SI-AT H2 corridor ("Project") is a part of ENTSOG TYNDP 2024 and will be resubmitted for ENTSOG TYNDP 2026 and involves repurposing of the existing natural gas main pipelines and development of new hydrogen ready pipelines for use with hydrogen. Repurposed pipeline will allow transport of natural gas - hydrogen blends as well as pure hydrogen. Parallel natural gas counterparts of repurposed main pipeline will remain in function as natural gas pipelines. Repurposed pipeline will be connected with planned new hydrogen ready pipelines and together they will enable hydrogen transit between all neighbouring countries. This Project is a crucial part of the hydrogen network, which would enable hydrogen transmissions from LH2 terminal on the Island of Krk and local H2 production points across Croatian and Slovenian territory and hydrogen supply to Slovenia, Croatia and Austria from approximately 2035 onwards. The Project will establish two new hydrogen IPs: Austria (Murfeld) - Slovenia (Ceršak) and Croatia (Rogatec) - Slovenia (Rogatec) and one new LH2 supply point on the Island of Krk.

Further Market Demand Assessment will be performed periodically depending on TSOs' decision.

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

TSOs have received the above mentioned non-binding indications in 2025 according to point A.

HR/SI H2 (Rogatec/Rogatec) hydrogen interconnection point (IP) is not an existing network point.

Currently there is no regulation related to hydrogen demand survey, which defines the next steps.

C. Conclusion

According to the assessment result of the non-binding demand indications under point B, no capacity project will be initiated. Based on the aforementioned decision, no technical studies for capacity projects will be conducted, however both TSOs will continue to develop the Project in line with their National NDPs and ENTSOG TYNDP.

D. Contact information

Plinovodi d.o.o.

Urška Gabrovšek

Head of Marketing and Regulation Department

Marketing and Regulation Department

+386 1 5820 696

urska.gabrovsek@plinovodi.si

Cesta Ljubljanske brigade 11b

1000 Ljubljana

Slovenia

Plinacro Ltd.

Robert Bošnjak

Head of Strategic Development Department

+385-1-6301-752

robert.bosnjak@plinacro.hr

Savska cesta 88a

10000 Zagreb

Croatia