



**Demand assessment report  
for submitted capacity referred to hydrogen  
transmission between  
*EUSTREAM* and *FGSZ***

**– External document for publication –**

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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**

FGSZ has launched a non-binding market demand survey on hydrogen capacity demand for internal and interconnection points. FGSZ invited all the Network Users to fill in the non-binding incremental capacity survey, which was available on the FGSZ's website between 07<sup>th</sup> July and 01<sup>th</sup> September 2025. EUSTREAM and FGSZ have received the following non-binding demand indication for firm hydrogen transmission capacity at the envisaged interconnection points between the entry-exit system of EUSTREAM and the entry-exit system of FGSZ.

Demand requested from FGSZ:

From	To	Gas year	Amount	Request is submitted to other TSOs	Period when Demand Indication was received	Additional Information
“EXIT CAPACITY”	“ENTRY CAPACITY”		[Please indicate unit: (kWh/h)]	[yes, TSO] or [no] (detailed information shall be provided below)		(e.g. type of capacity, if different from bundled firm freely allocable)
<i>Slovakia</i>	<i>Hungary</i>	<i>2029/30-2050/51</i>	<i>173 880 (2029/30) 243 880 (2029/30...2033/34) 318 400 (2034/35) 645 201 (2035/36...2038/39) 810 801(2039/40...2050/51)</i>	<i>Yes, partially</i>	<i>07.07.2025.- 01.09.2025</i>	<i>-</i>

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

Demand requested from EUSTREAM:

From	To	Gas year	Amount in 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>Slovakia</i>	<i>Hungary</i>	<i>2029/30-2050/51</i>	<i>173 880 (2029/30) 243 880 (2030/31) 173 880 (2031/32...2033/34) 248 400 (2034/35...2038/39) 414 000(2039/40...2050/51)</i>	<i>Yes, FGSZ</i>	<i>07.07.2025.- 01.09.2025</i>	-

From	To	Gas year [yyyy/yy]	Amount in 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>Slovakia</i>	<i>2029/30-2050/51</i>	<i>6800 (2029/30... 2050/51)</i>	<i>Yes, FGSZ</i>	<i>07.07.2025.- 01.09.2025</i>	-

## **B. Demand assessment**

FGSZ has been conducting this market survey procedure run from 07<sup>th</sup> July up to 01<sup>th</sup> September 2025 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**

Balassagyarmat 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 SK/HU H2, Balassagyarmat was involved in the ENTSOG TYNDP 2024 (HYD-N-1206 and HYD-N-835) as hydrogen project and intends to become a part of hydrogen backbone establishing hydrogen interconnection between the Slovakia and Hungarian hydrogen system from 2030 onwards. Project will establish new supply route for hydrogen and will connect the two neighbouring countries Slovakia 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 is able to establish a new hydrogen IP between Slovakia 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 EUSTREAM and FGSZ common decision, TSOs will study further the SK/HU hydrogen interconnection and the activities in regard to establishing SK/HU hydrogen interconnection will continue.

TSOs will work further with the submitted demand and the ENTSOG TYNDP 2026 scenarios data. Project submission for inclusion into the EU TYNDP 2026 is open from 29<sup>th</sup> September till 26<sup>th</sup> October 2025. The Ten-Year Development Plans will be updated and submitted to NRAs in line with TSOs' legal obligation.

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

### **D. Contact information**

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