

**Demand Assessment Report  
for Incremental Capacity  
between *Bulgartransgaz* and  
*ICGB***

**– Document for publication –**

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This report is a joint assessment of the potential for Incremental Capacity projects conducted by:

Bulgartransgaz EAD

ICGB AD

Bldv. Pancho Vladigerov 66 Lyulin 2, CP 3  
Sofia 1000  
Bulgaria  
T: +359 (2) 9396 300

23 George Washington Street  
Sofia 1000  
Bulgaria  
T: +359 (2) 4513 545

E: [info@bulgartransgaz.bg](mailto:info@bulgartransgaz.bg)  
[www.bulgartransgaz.bg](http://www.bulgartransgaz.bg)

E: [incremental.capacity@icgb.eu](mailto:incremental.capacity@icgb.eu)  
[www.icgb.eu](http://www.icgb.eu)



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## A. NON-BINDING DEMAND INDICATIONS

### Background

Currently, the Bulgarian Gas Transmission System, operated by Bulgartrngaz EAD (“Bulgartrngaz”), is connected to the Interconnector Greece-Bulgaria (“IGB”), operated by ICGB AD (“ICGB”), in the region of Stara Zagora, Bulgaria (“BG”). The Interconnection point (“IP”) between the two gas transmission system operators is IP STARA ZAGORA with EIC: 58Z-IP-00034-STZ.

The IGB pipeline became operational in October 2022, enabling additional gas flows from the Greek territory to be transmitted to Bulgaria. ICGB operates under specific regulatory regime pursuant to *Final Joint Decision of the Energy Regulators on the Exemption Application of ICGB AD dated August 2018* (and the amendments to it)<sup>1</sup>, establishing possibility for upgrading the IGB capacity to approximately 5 bcm/y.

ICGB and Bulgartrngaz (the “TSOs”), in compliance with the applicable regulations, have launched the Demand Assessment phase of the Incremental Capacity Process in July 2025, in line with the provisions of Article 26 of Commission Regulation (EU) 2017/459 establishing a network code on capacity allocation mechanisms in gas transmission systems (**CAM NC**). This Demand Assessment Report (“DAR”) refers to the IP STARA ZAGORA (EIC: 58Z-IP-00034-STZ) between Bulgartrngaz and ICGB in the area of Stara Zagora (BG).

The TSOs have not received non-binding demand indications for forward firm capacity at IP Stara Zagora within the relevant application periods and are publishing this joint Demand Assessment Report (**DAR**) in line with the provisions of Chapter V of the CAM NC.

As no non-binding demand indications were received by the TSOs before the publication of this Demand Assessment Report, the TSOs will not initiate technical studies for an Incremental Capacity Project.

### 1. Non-binding demand indications for Forward Firm Capacity

No non-binding demand indications were received by Bulgartrngaz or ICGB for the IP Stara Zagora for any Gas Year.

## B. DEMAND ASSESSMENT

The Demand Assessment phase commenced immediately after the start of the Annual Yearly Capacity Auction, as specified in Article 26(1) of CAM NC. Each of the TSOs provided the network users the opportunity to submit non-binding demand indications to quantify potential demand for incremental capacity.

### 1. Historical usage pattern

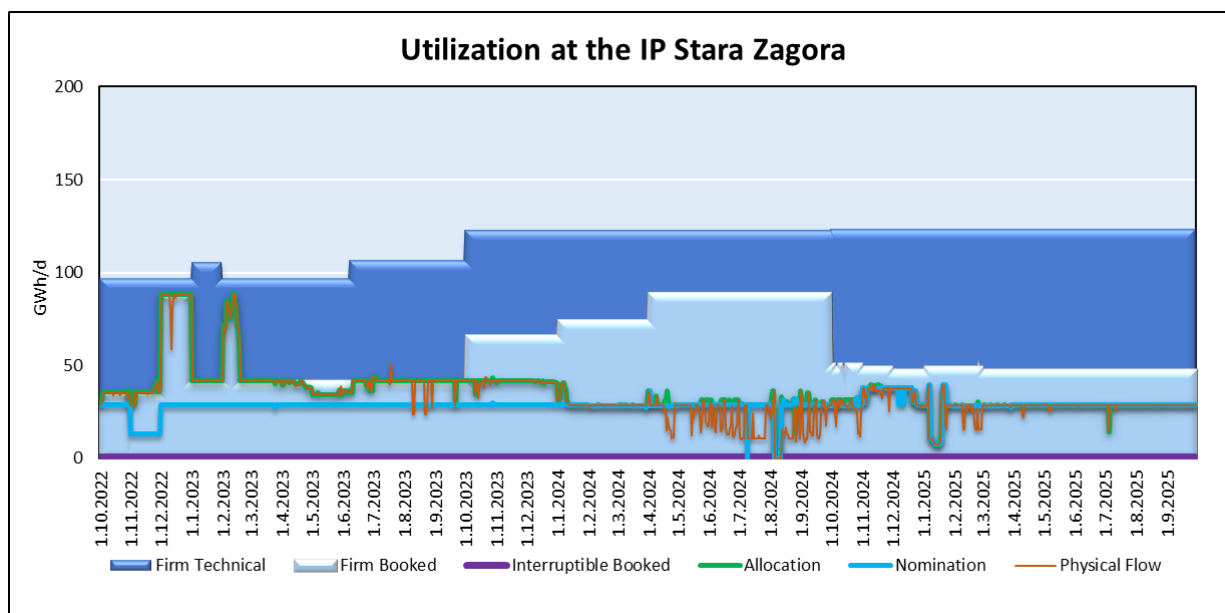
The utilization of the technical capacity is presented in the charts below by comparing the technical capacity with the booked capacity, the allocated commercial flows and physical flows from the start of operations of IP Stara Zagora which coincided with IGB’s start of operations on 1<sup>st</sup> October 2022.

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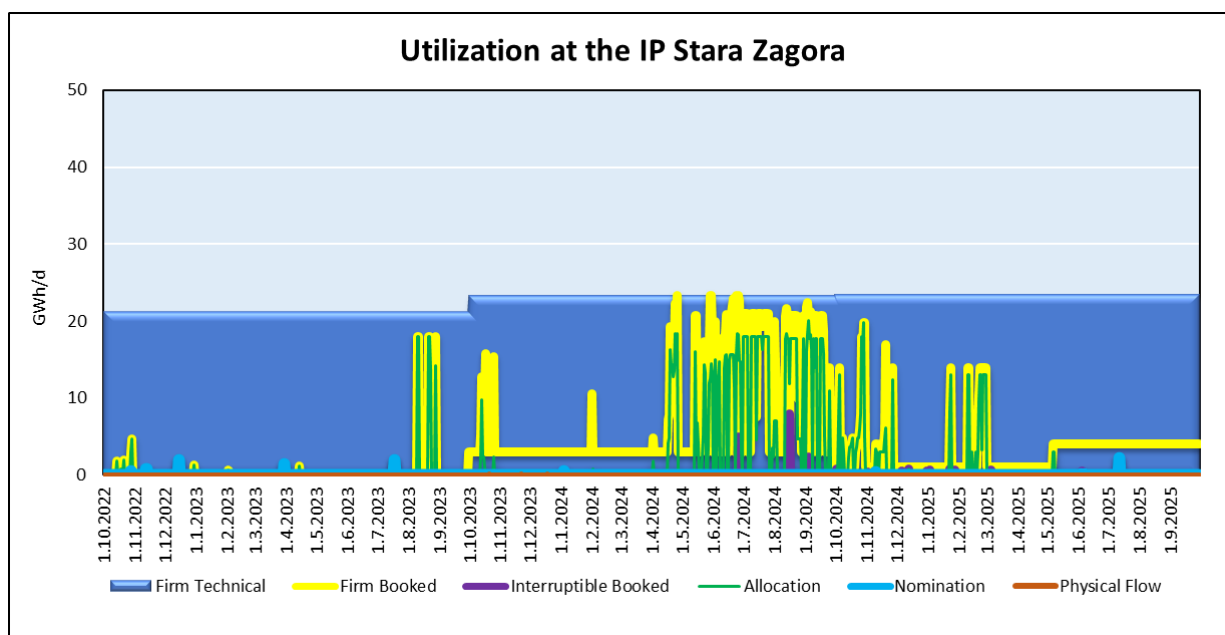
<sup>1</sup> Adopted by Decisions of RAEEW of Greece n. 768/2018 and EWRC of Bulgaria n. P-BO-2 on 08.08.2018. <https://www.dker.bg/bg/resheniya/resheniya-za-2018-god.html>.

- Bulgartransgaz

**GRAPH 1:** Utilization at the IP Stara Zagora – Bulgartransgaz (entry)



**GRAPH 2:** Utilization at the IP Stara Zagora – Bulgartransgaz (exit)



- ICGB

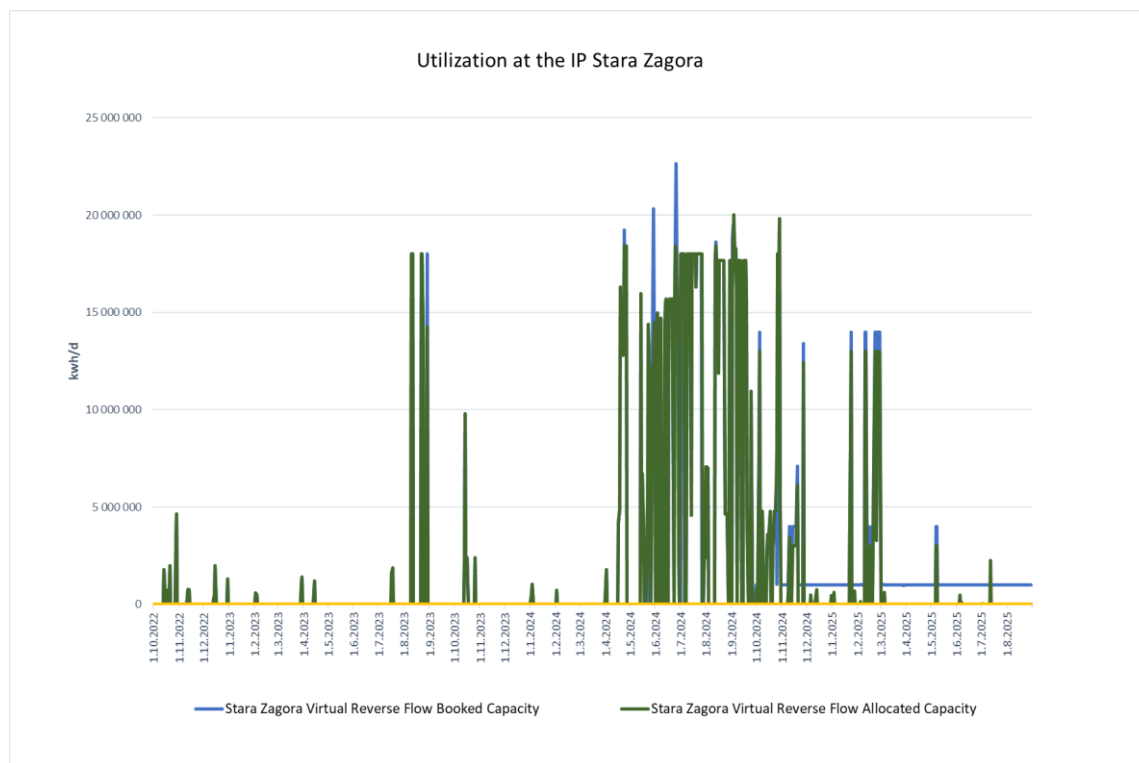
As of October 1<sup>st</sup> 2022 ICGB offers at IP Stara Zagora the following capacity products on the RBP capacity booking platform:

- Forward Firm Entry Capacity;
- Commercial Reverse Capacity.

In addition, at IP Stara Zagora, ICGB has allocated Exempted Capacity under long-term contracts for up to 25 years since the start of commercial operation pursuant to the *Final Joint Decision of the Energy Regulators on the Exemption Application of ICGB AD dated August 2018* (and the amendments to it).<sup>2</sup>

*\*Firm Booked Capacity is the sum of the Exempted Capacity booked under long-term contracts and the Forward Firm Capacity booked at the capacity trading platform.*

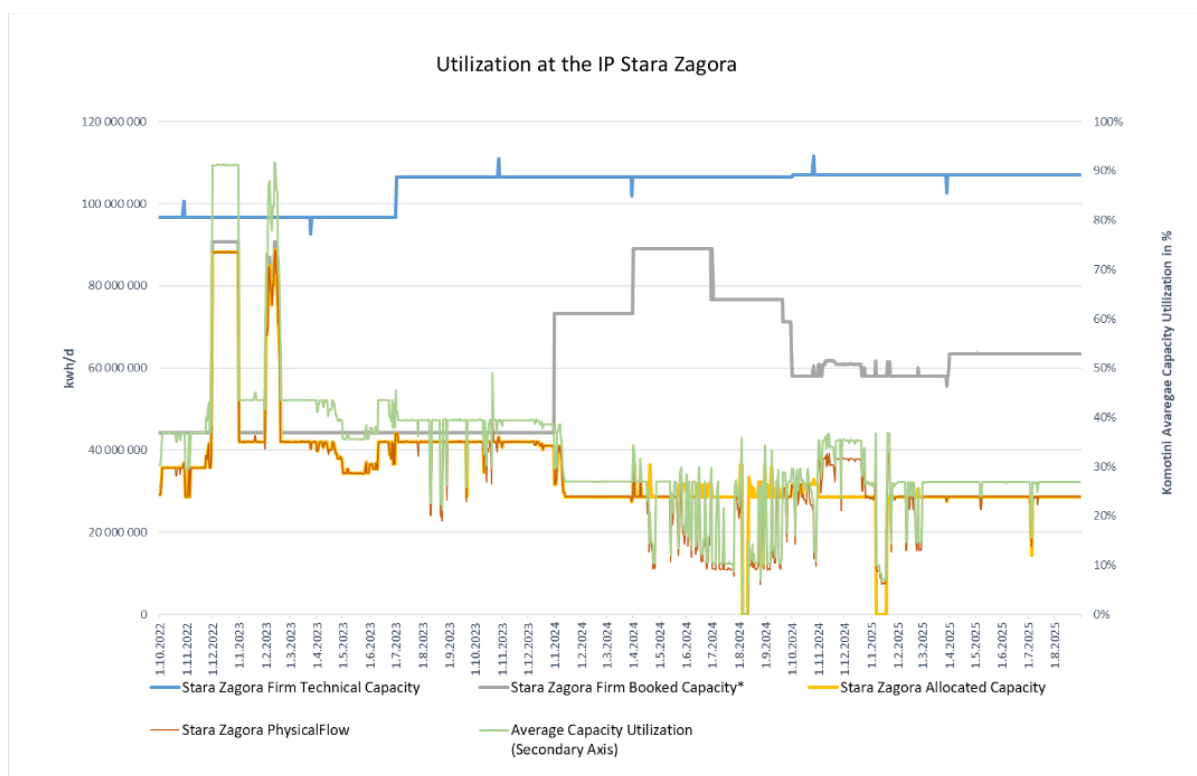
**GRAPH 3: Utilization at the IP Stara Zagora – ICGB (entry)**



*\*At IP Stara Zagora – ICGB (entry) Only Virtual reverse capacity is being offered on an interruptible basis*

<sup>2</sup> Accepted by Decisions of RAEWW of Greece n. 768/2018 and EWRC of Bulgaria n. P-BO-2 on 08.08.2018.  
<https://www.dker.bg/bg/resheniya/resheniya-za-2018-god.html>.

**GRAPH 4:** Utilization at the IP Stara Zagora – ICGB (exit)



## 2. Results of current annual yearly auction

- Bulgartransgaz

The results of the recent annual yearly firm capacity auction that took place on 7<sup>th</sup> of July 2025 for the IP Stara Zagora, are presented below:

| Network Point Exit/Entry | Category | Product | Gas Year  | Offered Capacity<br>KWh/d | Booked Capacity<br>KWh/d |
|--------------------------|----------|---------|-----------|---------------------------|--------------------------|
| Stara Zagora, Entry      | Firm     | Yearly  | 2025/2026 | 101,264,739               | 0                        |
| Stara Zagora, Exit       |          |         |           | 21,085,618                | 0                        |
| Stara Zagora, Entry      | Firm     | Yearly  | 2026/2027 | 101,264,739               | 0                        |
| Stara Zagora, Exit       |          |         |           | 0                         | 0                        |
| Stara Zagora, Entry      | Firm     | Yearly  | 2027/2028 | 99,188,492                | 0                        |
| Stara Zagora, Exit       |          |         |           | 0                         | 0                        |
| Stara Zagora, Entry      | Firm     | Yearly  | 2028/2029 | 110,594,065               | 0                        |
| Stara Zagora, Exit       |          |         |           | 0                         | 0                        |
| Stara Zagora, Entry      | Firm     | Yearly  | 2029/2030 | 110,594,065               | 0                        |

|                    |  |  |  |   |   |
|--------------------|--|--|--|---|---|
| Stara Zagora, Exit |  |  |  | 0 | 0 |
|--------------------|--|--|--|---|---|

- ICGB

The results of the recent annual yearly firm capacity auction that took place on 7<sup>th</sup> of July 2025 for the IP Stara Zagora, are presented below:

| Network Point Exit/Entry | Category | Product | Gas Year  | Offered Capacity KWh/d | Booked Capacity KWh/d |
|--------------------------|----------|---------|-----------|------------------------|-----------------------|
| Stara Zagora Entry       | Firm     | Yearly  | 2025/2026 | 42,795,371             | 0                     |
| Stara Zagora Entry       | Firm     | Yearly  | 2026/2027 | 42,795,371             | 0                     |
| Stara Zagora Entry       | Firm     | Yearly  | 2027/2028 | 42,121,676             | 0                     |
| Stara Zagora Entry       | Firm     | Yearly  | 2028/2029 | 53,527,249             | 0                     |
| Stara Zagora Entry       | Firm     | Yearly  | 2029/2030 | 53,527,249             | 0                     |

### 3. Relations to GRIPS, TYNDP, NDPs

- Bulgartransgaz

Bulgartransgaz has not included a project for incremental capacity on its side of IP STARA ZAGORA in its most recent TYNDP 2025-2034 or other development plans.

- ICGB

IGB pipeline is included in the 5<sup>th</sup> edition of the Southern Corridor Gas Regional Investment Plan (SC GRIP)<sup>3</sup> of ENTSOG as a key transmission project for the Southern Corridor Region (project TRA-F-378).

IGB pipeline is included in the TYNDP 2015, 2017, 2018, 2020, 2022 and in the Draft TYNDP 2024 of ENTSOG<sup>4</sup>. Due to its specific regulatory regime ICGB is exempted from the obligation to submit a ten-year network development plan under Article 22 of the Directive 2009/73/EC concerning common

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<sup>3</sup> Fifth edition of the Southern Corridor Gas Regional Investment Plan (SC GRIP) of ENTSOG ([https://www.entsog.eu/sites/default/files/2022-03/GRIP\\_SC\\_2021\\_220318.pdf](https://www.entsog.eu/sites/default/files/2022-03/GRIP_SC_2021_220318.pdf)).

<sup>4</sup> Ten Year Network Development Plan (TYNDP) of ENTSOG.



rules for the internal market in natural gas.<sup>5</sup> As an interconnector, IGB pipeline has not been included in any National Development Plans (NDPs) since NDPs refer mainly to developments on a national level.

IGB pipeline is acknowledged as a leading project within the CESEC (The Central and South-Eastern Europe Energy Connectivity) initiative.

The IGB Interconnector was included as a Project of Common Interest (PCI) in the First (2013), Second (2015), Third (2017), Fourth (2019) and Fifth (2021) PCI Lists.<sup>6</sup>

#### **4. Expected amount, direction and duration of demand for incremental capacity**

The TSOs have not received non-binding demand indications for forward firm capacity at IP Stara Zagora.

Considering the available capacity at IP Stara Zagora, historical usage patterns, and the fact that no non-binding demand indications have been received by the TSOs, it is concluded that gas transmission can be fully performed based on the currently available capacity at IP Stara Zagora, on both sides of the IP.

### **C. CONCLUSION FOR THE NON-INITIATION OF AN INCREMENTAL CAPACITY PROJECT/PROCESS**

Based on the fact that no non-binding demand indications have been received for IP Stara Zagora, an **Incremental Capacity Project will not be initiated.**

Bulgartransgaz and ICGB will not proceed to the next phase of the 2025 Incremental Capacity Process and will not open the Coordinated Design Phase for the definition of technical studies specifically applied to IP Stara Zagora.

### **D. PROVISIONAL TIMELINE**

N/A

### **E. INTERIM ARRANGEMENTS FOR THE AUCTION OF EXISTING CAPACITY ON CONCERNED IP(S)**

N/A

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<sup>5</sup> Section 4.1.(1) of Final Joint Decision of the Energy Regulators on the Exemption Application of ICGB AD dated August 2018 (and the amendments to it), accepted by Decisions of RAEWW of Greece n. 768/2018 and EWRC of Bulgaria n. P-BO-2 on 08.08.2018 <https://www.dker.bg/bg/resheniya/resheniya-za-2018-god.html>

<sup>6</sup> [Key cross border infrastructure projects \(europa.eu\) https://energy.ec.europa.eu/topics/infrastructure/projects-common-interest/key-cross-border-infrastructureprojects\\_en#:~:text=The%20PCI%20list%201%20Fifth%20PCI%20list%3A%20Regulation,PCI%20list%3A%20Regulation%20%28EU%291391%2F2013%20of%2013%20October%202013](https://energy.ec.europa.eu/topics/infrastructure/projects-common-interest/key-cross-border-infrastructureprojects_en#:~:text=The%20PCI%20list%201%20Fifth%20PCI%20list%3A%20Regulation,PCI%20list%3A%20Regulation%20%28EU%291391%2F2013%20of%2013%20October%202013)

## F. FEES

According to Article 26(11) of CAM NC, transmission system operators may charge fees for activities which result from the submission of non-binding demand indications.

For the incremental capacity cycle addressed by this report, ICGB and Bulgartransgaz have not introduced a fee for the evaluation and processing of non-binding demand indications.

## G. CONTACT INFORMATION

### **Nikola Delev**

Director “Strategic Planning & Development”

Bulgartransgaz EAD

Blvd. Pancho Vladigerov 66 Lyulin 2, CP 3

Sofia 1000, Bulgaria

[www.bulgartransgaz.bg](http://www.bulgartransgaz.bg)

[info@bulgartransgaz.bg](mailto:info@bulgartransgaz.bg)

### **Svetlin Berkov**

Market Research and Regulation Expert

ICGB AD

23 George Washington Street

Sofia 1000, Bulgaria

[www.icgb.eu](http://www.icgb.eu)

[incremental.capacity@icgb.eu](mailto:incremental.capacity@icgb.eu)

