



**Demand assessment report
for incremental capacity between
Plinovodi d.o.o. and *Snam Rete Gas S.p.A.***

– External document for publication –

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

Plinovodi d.o.o.

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Table of contents

A. Non-binding Demand indications	4
B. Demand assessment	4
i. Historical usage pattern	4
ii. Results of current annual yearly auction	7
iii. Expected amount, direction and duration of demand for incremental capacity	8
C. Conclusion for the (non)-initiation of an incremental capacity project/process	8
D. Fees	8
E. Contact information	9

A. Non-binding Demand indications

The Involved TSOs, Snam Rete Gas (“SRG”) and Plinovodi, have launched a non-binding market demand assessment on incremental capacity for interconnection points. TSOs, have in accordance with the Articles 26 to 29 of the Commission Regulation (EU) 2017/459, invited all the Network Users to fill in the non-binding incremental capacity survey, which was available on the TSOs websites for eight weeks, between 7 July and 1 September 2025. Within this period, no non-binding gas transmission demand indications for firm capacity at the interconnection point between the entry-exit system of SRG and the entry-exit system of Plinovodi were received by SRG or Plinovodi.

B. Demand assessment

The Demand Assessment Phase commenced immediately after the start of the annual yearly capacity auction, as specified in Article 11(4) of the Commission Regulation (EU) 2017/459, and closes maximum 16 weeks after the annual yearly capacity auction in accordance with Article 26 of the Commission Regulation (EU) 2017/459.

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 for incremental capacity from 7th July up to 1st September 2025.

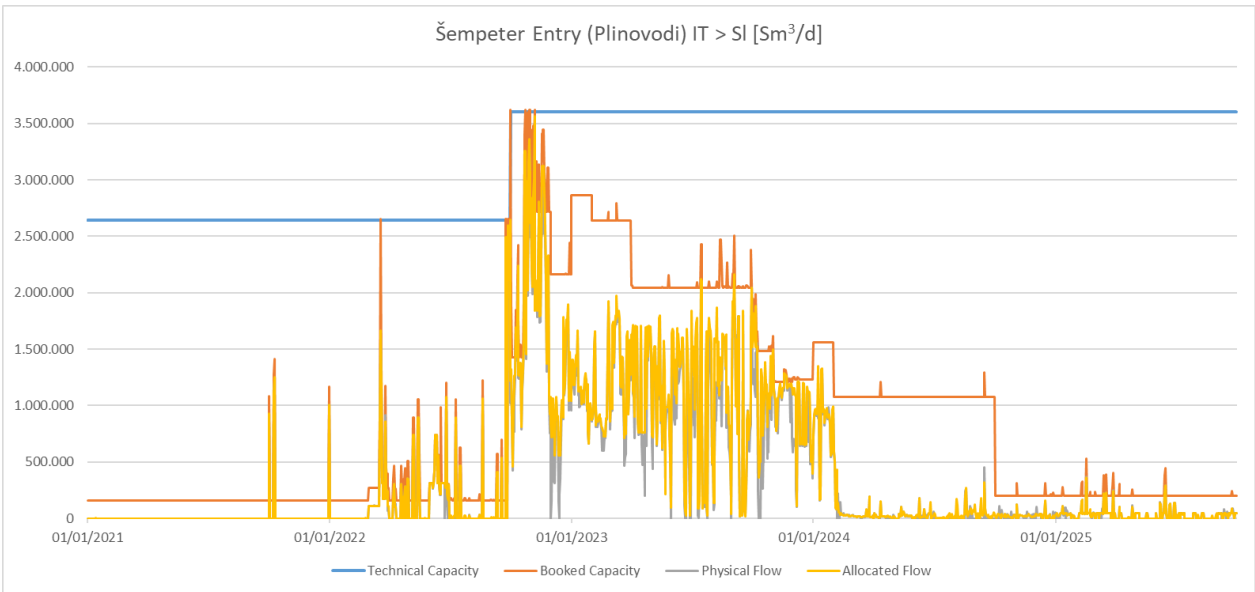
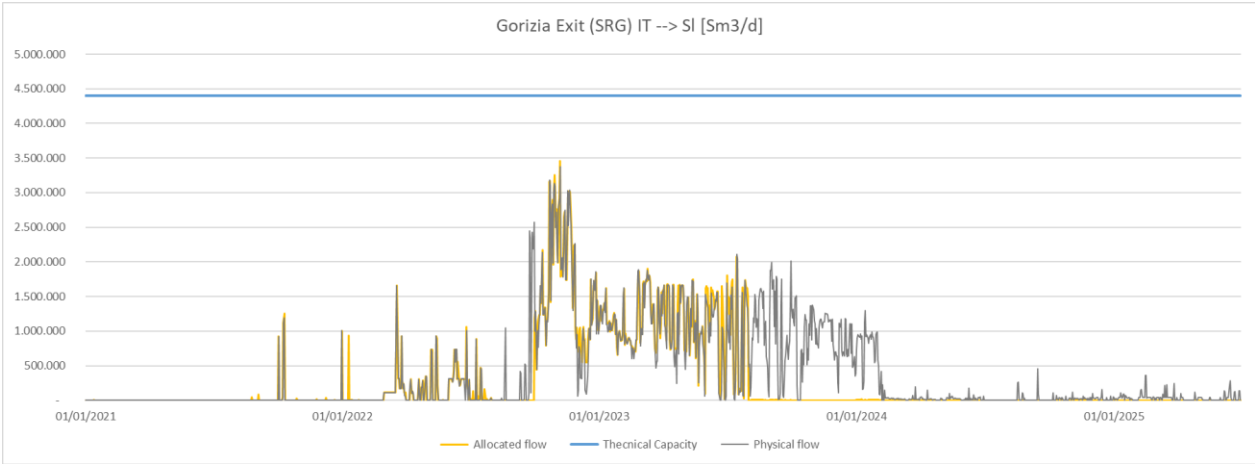
During this period no non-binding demand indications have been received. This evidence has been used as a basis for this demand assessment.

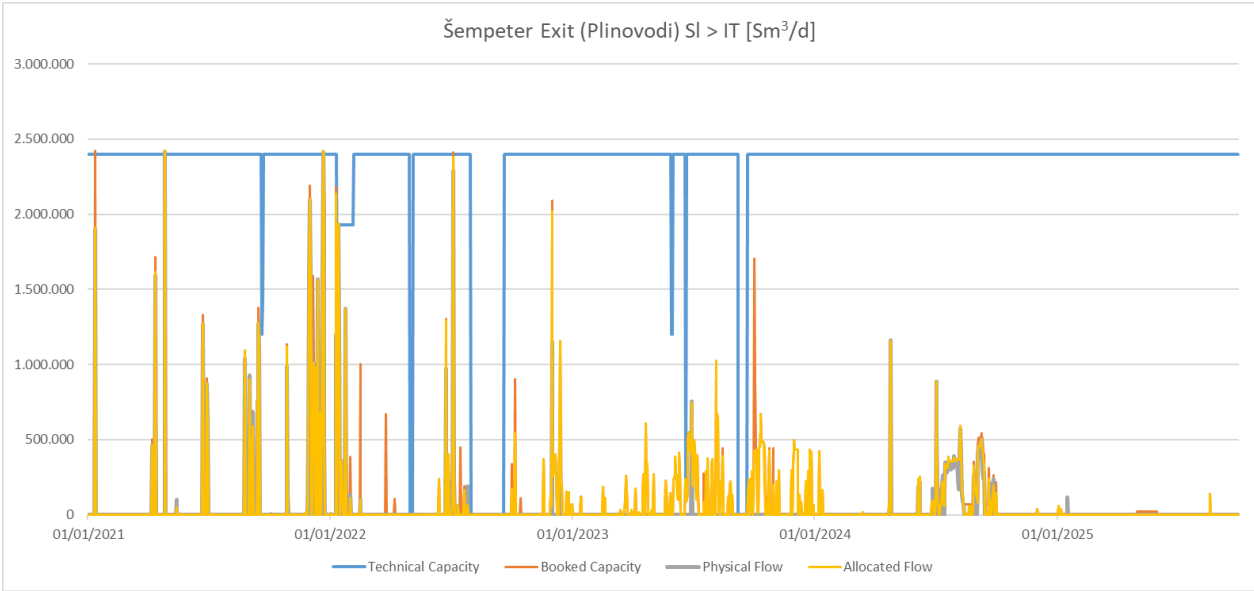
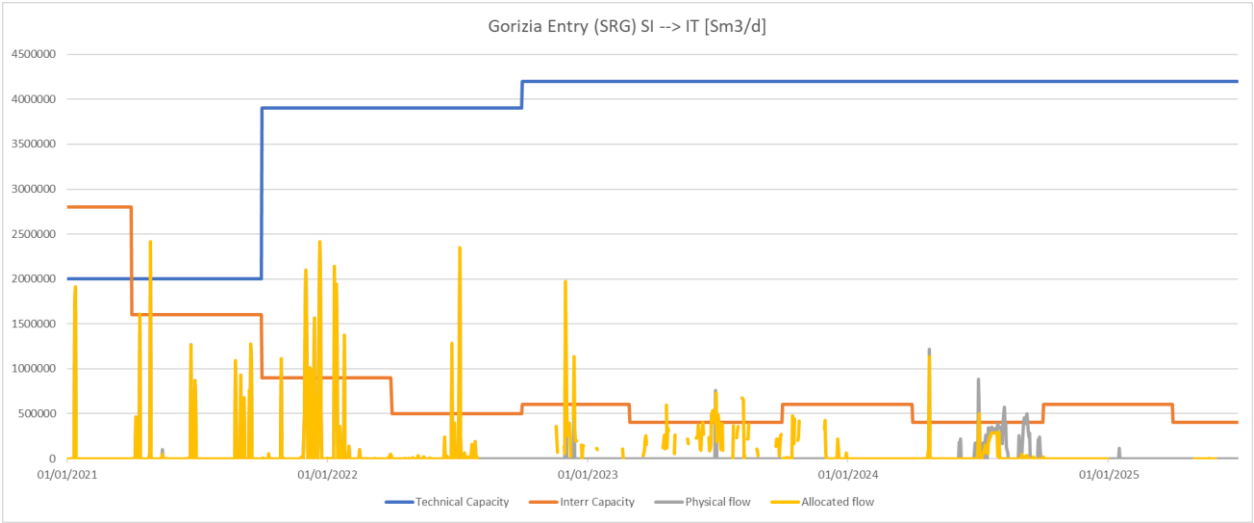
i. Historical usage pattern

Following Russia-Ukraine war, major changes in supply and demand patterns occurred resulting in several gas transportation routes makeovers, some of which determining congestion situations across the Union.

As shown in the following graphs, also the flows at the interconnection point between Italy and Slovenia have undergone changes, in particular with reference to the emergence of flows from Italy to Slovenia, as reaction to the significant reduction of Russian supplies.

The utilisation of the technical firm capacity is presented in the chart below by comparing the technical capacity with the booked capacity, the allocated “commercial” flow and the physical flow from 2021 to 2025 at the interested interconnection point.





ii. Results of current annual yearly auction

In the last annual yearly auctions, that took place on 7th July 2025 the following results have been achieved:

Interconnecti on point name	Flow direction	Gas year	Offered capacity Amount		Booked Capacity Amount	
			Sm3/d	kWh/d	Sm3/d	kWh/d
Gorizia	IT->SI	25/26	7.865.619	86.302.416	0	0
Gorizia	IT->SI	From 26/27- 29/30	3.218.217	35.310.624	0	0
Gorizia	IT->SI	From 30/31 to 39/40	2.860.638	31.387.224	0	0
Sempeter	IT->SI	From 25/26 to 29/30	3.103.842	33.617.923	0	0
Sempeter	IT->SI	From 30/31 to 33/34	2.741.606	29.694.518	0	0
Sempeter	IT->SI	From 34/35 to 39/40	2.897.890	31.387.238	0	0
Gorizia	SI->IT	25/26	7.508.825	82.123.056	0	0
Gorizia	SI->IT	From 26/27 to 29/30	2.145.468	23.464.704	0	0
Sempeter	SI->IT	From 25/26 to 29/30	2.185.354	23.464.706	0	0
Sempeter	SI->IT	From 30/31 to 39/40	1.942.540	20.857.517	0	0

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

- Plinovodi and SRG did not receive any non-binding demand indications for the Incremental Capacity Process 2025.

The available capacity (i.e. technical capacity which is not yet booked in the long term) for the requested period is therefore currently deemed sufficient to cover potential future need for capacity. Capacity information in general can be found on concerned TSOs website as well as on ENTSOG's Transparency Platform.

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

Based on this report and according to the assessment result of the non-binding demand indications, the historical usage patterns and the results of the latest annual auctions, which already indicated that no additional demand levels for incremental capacity need to be developed, currently **no incremental capacity project will be initiated for the Incremental cycle 2025**. This conclusion is without prejudice to the possibility for both TSOs to develop projects also concerning the Interconnection Point between Italy and Slovenia, in line with their network development plans.

D. Fees

For the incremental capacity cycle addressed by this report, involved TSOs did not introduce a fee for the evaluation and processing of non-binding demand indications.

E. Contact information

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