

Before going through the content of each specific Project Fiche, please read the introduction document.

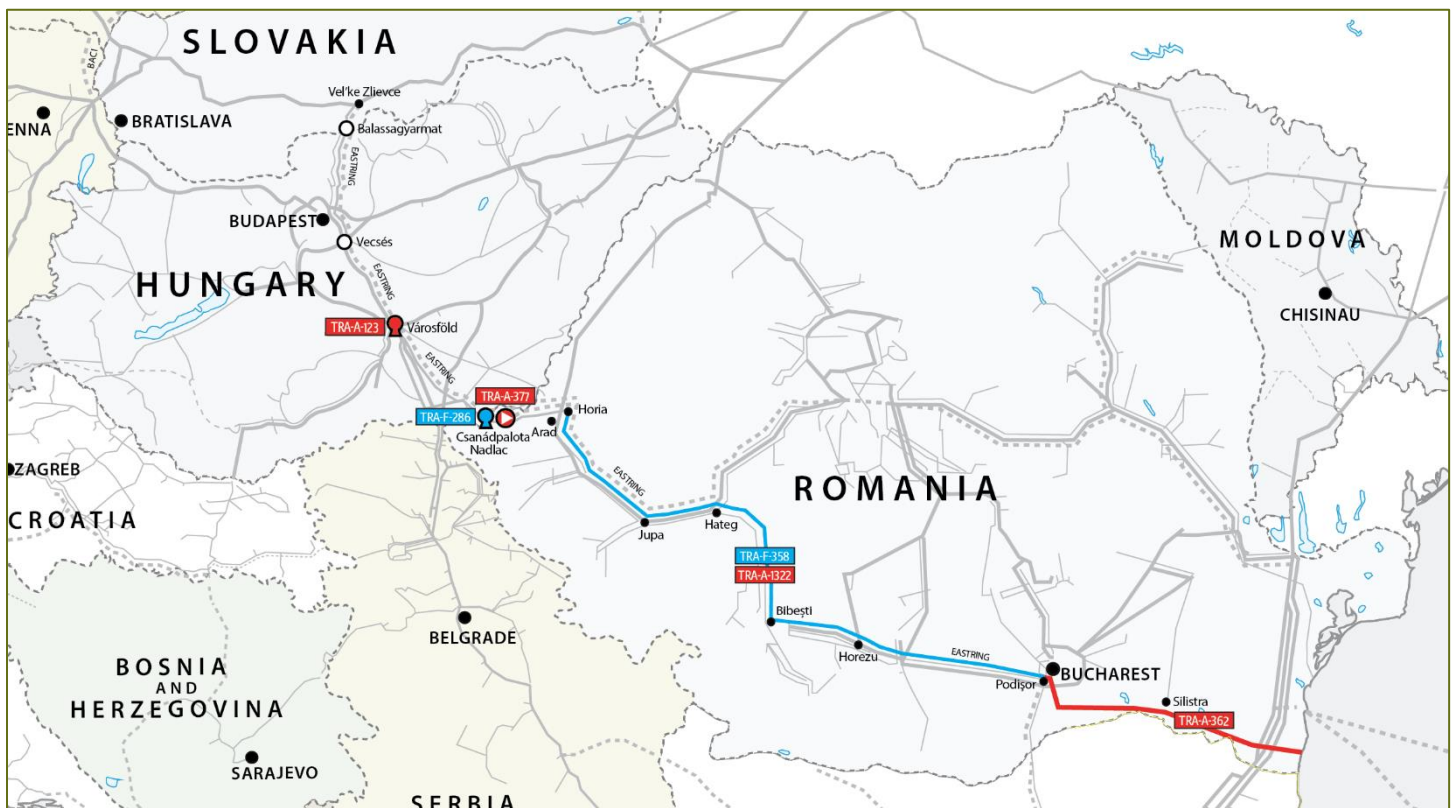
Project Group EAST_12B - BRUA (phase I + phase II)

Reasons for grouping [ENTSO G]

Project group represents the development of the first and second phases of the BRUA supply chain which aims at increasing existing capacities at Romania-Hungary interconnection at Csanadpalota IP and Romania -Bulgaria interconnection at Ruse (BG)/ Giurgiu (RO).

Objective of the project(s) in the group [Promoter]

The project group aims at improving **market integration** as a result of a decrease in the congestion of the energy infrastructure and an increase in interoperability and flexibility of the system. Implementation of the project group aims at enhancing **security of supply** and **competition** by ensuring the proper interconnections, by the diversification of supply sources, transmission routes and stakeholders thus reducing the market concentration and also **sustainability** by reducing emissions due to the replacement of pollutant fuels with natural gas issuing less carbon dioxide per delivered energy unit.



Projects constituting the group

| TYNDP Project Code | Project Name | Promoter | Hosting Country | Project Status | 4th PCI List Code | First Comm. Year | Last Comm. Year | Compared to TYNP 2018 |
|--------------------|---|-------------------|-----------------|----------------|-------------------|------------------|-----------------|-----------------------|
| TRA-A-0123 | Városföld CS | FGSZ | HU | Advanced | 6.24.4.1 | 2022 | 2022 | Deleted |
| TRA-F-358 | Development on the Romanian territory of the NTS (BG–RO–HU–AT)-Phase I | SNTGN Transgaz SA | RO | FID | 6.24.1.1 | 2019 | 2020 | Commissioned |
| TRA-A-362 | Development on the Romanian territory of the Southern Transmission Corridor | SNTGN Transgaz SA | RO | Advanced | 6.24.4.3 | 2020 | 2022 | Delayed |
| TRA-A-0377 | Romanian-Hungarian reverse flow Hungarian section 2nd stage | FGSZ | HU | Advanced | 6.24.4.4 | 2022 | 2025 | Rescheduled |
| TRA-F-0286 | Romanian-Hungarian reverse flow Hungarian section 1st stage | FGSZ | HU | FID | - | 2019 | 2019 | Completed |
| TRA-A-1322 | Development on the Romanian territory of the NTS (BG–RO–HU–AT)-Phase II | SNTGN Transgaz SA | RO | Advanced | 6.24.4.2 | 2022 | 2022 | Delayed |

Technical Information

| TYNDP Project Code | Diameter [mm] | Length [km] | Compressor Power [MW] |
|--------------------|---------------|-------------|-----------------------|
| TRA-A-123 | - | - | 6 |
| TRA-A-362 | 1200/1000 | 308 | - |
| TRA-A-377 | - | - | 4 |
| TRA-A-1322 | 800 | 50 | 14 |
| TRA-F-286 | - | - | 9 |
| TRA-F-358 | 800 | 479 | 28 |

Capacity Increment

The capacity increment values for each project are provided at all related Interconnection points (IP), both for “exit” and “entry” directions, being indicated the operator of the IP as well as the associated commissioning years of the capacity increments.

This information is presented in the table below and should be read per each line as follows: a certain project, TRA-N-123, can bring at a specific “Point Name” operated by “Operator X” an “exit” capacity increment “From System Y” “To System Z” which has associated an “Increment Commissioning Year”. Equally, for the same “Point Name” and operated by the same “Operator X”, an “entry” (reverse) capacity increment can be available to system “Y” from system “Z” which at its turn has associated an “Increment Commissioning Year”.

| TYNDP Project Code | Point Name | Operator | From System | Exit Capacity [GWh/d] | Increment Comm. Year | To System | Entry Capacity [GWh/d] | Increment Comm. Year |
|--------------------|--------------------------|---------------------|----------------------------|-----------------------|----------------------|------------------------------|------------------------|----------------------|
| TRA-A-1322 | Csanadpalota | SNTGN Transgaz S.A. | Transmission Romania | 75.88 | 2022 | Transmission Hungary (MGP) | 78.12 | 2022 |
| TRA-A-377 | Csanadpalota | FGSZ Ltd. | Transmission Hungary (MGP) | 76.5 | 2022 | Transmission Romania | 76.5 | 2025 |
| TRA-F-286 | Csanadpalota | FGSZ Ltd. | Transmission Romania | 0 | - | Transmission Hungary (MGP) | 48.9 | 2019 |
| TRA-F-358 | Ruse (BG) / Giurgiu (RO) | SNTGN Transgaz S.A. | Transmission Romania | 20.8 | 2019 | Transmission Bulgaria (NGTS) | 0 | - |
| TRA-F-358 | Csanadpalota | SNTGN Transgaz S.A. | Transmission Romania | 47.75 | 2020 | Transmission Hungary (MGP) | 0 | - |
| TRA-F-358 | Ruse (BG) / Giurgiu (RO) | SNTGN Transgaz S.A. | Transmission Romania | 20.75 | 2020 | Transmission Bulgaria (NGTS) | 0 | - |

B. Project Cost Information

During the TYNDP 2020 Project Data Collection, promoters were asked to indicate whether their costs were confidential or not. The following tables display the costs provided by the promoters (as of June 2019, end of TYNDP 2020 project collection). The amounts provided can differ from the figures used by the project promoters in other contexts, where costs can be updated and/or evaluated using different methodologies or assumptions. For the purposes of this project fiche, in case promoters identified their costs as confidential, alternative costs have been provided by the promoter. The alternative costs are identified with “**”.

| | TRA-A-123 | TRA-A-1322 | TRA-A-362 | TRA-A-377 | TRA-F-286(**) | TRA-F-358 | Total Cost |
|--------------------------|-----------|------------|-----------|-----------|---------------|-----------|--------------|
| CAPEX [min, EUR] | 20 | 68.8 | 360.4 | 14.4 | - | 478.6 | 942.2 |
| OPEX [min, EUR/y] | 3.1 | 7.85 | 0.83 | 3.7 | - | 11.77 | 27.25 |
| Range CAPEX (%) | 25 | 10 | 10 | 25 | 20 | 10 | - |
| Range OPEX (%) | 15 | 15 | 15 | 15 | 10 | 15 | - |

** CAPEX and OPEX figures are confidential. In TYNDP 2020 project collection the project did not indicate intention to apply to PCI and it has been introduced in the project group only for capacity reason, therefore no alternative costs have been provided.

Description of costs and range [Promoter]

TRA-N-0362: costs estimated in the FEED, based on company experience in similar projects and market evolution. OPEX doesn't include the replacement costs, so therefore these costs are mentioned in the Excel file "Economic Results"

TRA-N-1322: costs estimated in the FEED, based on company experience in similar projects and market evolution. OPEX doesn't include the replacement costs, so therefore these costs are mentioned in the Excel file "Economic Results"

TRA-F-0358: Description of CAPEX: Costs estimated in the Feasibility Study, based on company experience in similar projects and market evolution. Description of OPEX: the most significant impact on operating cost is the cost of own consumption of gas for the operation of the compressor stations.

C. Project Benefits

C.1 Summary of project benefits

This section provides a summarised analysis by ENTSG of the main benefits stemming from the realisation of the overall group and according to the guidelines included in the ENTSG 2nd CBA Methodology. More details on the indicators are available in sections D and E.

National Trends

Benefits explained (but Sustainability) [ENTSG]

> Security of Supply:

The projects group **increases the remaining flexibility** in Romania in the existing and low infrastructure levels from 2025 and in Hungary in 2025 in peak day thanks to the new interconnection between Hungary and Bulgaria and the increase of capacity between Romania and Bulgaria.

In case of Ukrainian supply route disruption:

In the existing infrastructure level, in case of Ukrainian disruption, the projects group **fully mitigates the risk of demand curtailment** in 2-week cold spell and in 2-week dunkelflaute in 2030 in Romania and reduces this risk in 2040. Additionally, for peak-day climatic stress case, the project groups reduces the risk of demand curtailment in 2020 in South-eastern countries (Bosnia, Croatia, Serbia and Romania), and also fully mitigates the risk of demand curtailment in 2025 and 2030 in Romania, and reduces this same risk in 2040. This situation further improves with the implementation of FID and advanced-status projects, reaching lower curtailment rates in Romania in 2040 in the low and no curtailment in the advanced infrastructure level.

In case of Single Largest Infrastructure Disruption in Romania (SLID-RO), the project group fully **mitigates the risk of demand curtailment** in Romania in 2030 and significantly **reduces this risk** in 2040 in the existing infrastructure level. This situation also improves in the low infrastructure level, where the project group **fully mitigates the risk of demand curtailment** in Romania in 2040.

> Competition:

The project group **improves the diversification of entry capacities** (LICD indicator) in Hungary in the existing infrastructure level and in Bulgaria and Hungary in the low and advanced infrastructure levels.

In the existing Infrastructure Level, the projects group **increases the access to Romanian National Production** in Bosnia and Herzegovina, Croatia, Hungary, Serbia and North Macedonia in 2025 and 2030. The project group also **increases the access to Romanian National Production** in Romania, Bulgaria, Greece and North Macedonia from 2025, however, as National Production is considered as a single source for Europe, this countries already had access to European indigenous production and therefore, Commercial Source Access indicator (CSA) does not show an increase in the number of supply sources for these countries.

The project group increases the cooperation in the area and improves diversification of supply sources, while increasing the access to Romanian National Production. In the low and advanced infrastructure levels, FID and advanced projects allow this supply source to reach also other European countries, however, the Commercial Source Access indicator (CSA) does not always show an increase in the number of supply sources for these countries, this is linked to the standard threshold applied by ENTSG to all the supply sources.

By enabling the connection to the new Romanian indigenous gas production, the project group realisation also increases diversification of the area and allows to **reduce the dependence from Russian and LNG**. More specifically, the project group **decreases the dependence of Russian gas** for Romania, Bulgaria and North Macedonia in 2025 and 2030 in the existing infrastructure level.

In the low infrastructure level, together with FID infrastructure, the project group **decreases the Russian gas dependence** in Bosnia and Herzegovina, Bulgaria, North Macedonia and Romania in 2025 and in Romania in 2030 and 2040.

In the advanced infrastructure level, the project group decreases the Russian gas dependence only in 2025 in Bosnia and Herzegovina, Bulgaria, Greece, Serbia, Romania and North Macedonia, and in Romania in 2030, as advanced-status projects already significantly reduced Russian dependence for whole Europe from 2030.

> Market integration:

The projects group **increases bidirectionality** between Bulgaria and Romania and between Hungary and Romania.

The project brings benefits in monetised term as a **reduction of the cost of gas supply**. In the reference supply price configuration this can be estimated around 208 MEur/y (on average) in the existing infrastructure level. Such benefit is driven by the fact that the project group allows some European countries to benefit from Romanian National Production.

Also, in case of expensive Russian gas supply price configuration, the project group brings additional benefits compared with the reference situation (264 MEur/y on average in the existing infrastructure level). Such benefits are driven by the fact that the project group allows some countries to rely on Romanian National production in case of expensive Russian gas prices.

These benefits are even higher in the low and advanced infrastructure levels, where FiD and advanced projects increased cross-border and transmission capacities in Eastern Europe, allowing Romanian indigenous production to reach more European countries, this can be estimated around 237 MEur/y (on average for reference supply price configuration) in the low infrastructure level. However, additional benefits are lower in the advanced infrastructure level as the overall cost of gas supply in Europe has been already reduced by advanced projects.

Distributed Energy

Benefits explained (but Sustainability) [ENTSO-G]

> Security of Supply:

In the existing infrastructure level, the projects group **increases the remaining flexibility** in Romania in 2025 under 2-week cold spell and in 2025, 2030 and 2040 under 2-week dunkelflaute climatic stress case. Additionally, for peak day, in the existing and low infrastructure levels, the project group **increases the remaining flexibility** in Hungary and in Romania.

Regarding Ukrainian supply route disruption:

In the existing infrastructure level, the project group **reduces the risk of demand curtailment** in Romania under peak day climatic stress conditions in GBC 2025 and **fully mitigates the risk of demand curtailment** in 2025 CBG gas demand scenario. This situation improves in the low infrastructure level, together with FiD project the project group fully mitigates the risk of demand curtailment in Romania in 2025.

> Competition:

The project group **improves the diversification of entry capacities** (LICD indicator) in Hungary in the existing infrastructure level and in Bulgaria and Hungary in the low and advanced infrastructure levels.

In the existing Infrastructure Level, the projects group **increases the access to Romanian National Production** in Bosnia and Herzegovina, Croatia, Hungary, Serbia and Bulgaria in 2025 and 2030. The project groups also increase the access to this source in Bulgaria, Greece and North Macedonia from 2025 (however these countries already have access in the existing infrastructure level). The project group increases the cooperation in the area and improves diversification of supply sources, while increasing the access to Romanian National Production.

In the low and advanced infrastructure levels, FiD and advanced projects allow this supply source to reach also other European countries increasing also the access to Romanian national production such as Greece and North Macedonia in 2025 and 2030 and also increasing the access to this supply source also in other European countries.

By enabling the connection to the new Romanian indigenous gas production, the project group realisation also increases diversification of the area and allows to **reduce the dependence from Russian and LNG**. More specifically, the project **group decreases the dependence of Russian gas** for Romania, Bulgaria, and North Macedonia in 2025 and in 2030 in the existing Infrastructure level.

In the low infrastructure level, together with FiD projects, the project group **decreases the Russian gas dependence** in Bulgaria, North Macedonia, Bosnia and Herzegovina and Romania in 2025 and in Hungary in 2030.

In the advanced infrastructure level, the project group decreases the Russian gas dependence of South-eastern countries in 2025, as for Distributed Energy demand scenario from 2030 Russian dependence is aligned in most European countries thanks to the implementation of advanced-status infrastructure.

> Market integration:

The projects group **increases bidirectionality** between Bulgaria and Romania and between Hungary and Romania.

The project brings benefits in monetised term as a **reduction of the cost of gas supply**. In the reference supply price configuration this can be estimated around 195 MEur/y (on average) in the existing infrastructure level. Such benefits are driven by the fact that the project group allows some European countries to benefit from Romanian National Production.

Also, in case of expensive Russian gas supply price configuration, the project group brings additional benefits compared with the reference situation (247.5 MEur/y on average in the existing infrastructure level). Such benefits are driven by the fact that the project group allows some countries to rely on Romanian National production in case of expensive Russian gas prices.

These benefits are higher in the low and advanced infrastructure levels, where FID and advanced projects increased cross-border and transmission capacities in Eastern Europe, allowing Romanian indigenous production to reach more European countries, this can be estimated around 218 MEur/y (on average in the reference supply price configuration) in the low infrastructure level. However, additional benefits are lower in the advanced infrastructure level as the overall cost of gas supply in Europe has been already reduced by advanced projects.

Global Ambition

Benefits explained (but Sustainability) [ENTSO G]

> Security of Supply:

In the existing and low infrastructure levels, the project group **significantly increases the remaining flexibility** in Romania for all climatic stress conditions and all years, reaching 100% for 2-weeks dunkelflaute and 2-week cold spell climatic stress cases. Additionally, for these infrastructure levels the project group also **increases remaining flexibility** in Hungary in 2025 for peak day thanks to this new interconnection with Romania.

In case of Ukrainian supply route disruption:

In the existing and low infrastructure levels, the project group **fully mitigates the risk of demand curtailment** in 2025 (existing and low) and 2030 (existing) in Romania and some neighbouring countries.

> Competition:

The project group **improves the diversification of entry capacities** (LICD indicator) in Hungary in the existing infrastructure level and in Bulgaria and Hungary in the low and advanced infrastructure levels.

In the existing Infrastructure Level, the projects group **increases the access to Romanian National Production** in Bosnia and Herzegovina, Croatia, Hungary, Serbia, Bulgaria and North Macedonia in 2025 and 2030. The project group also increases the access to Romanian National production in Greece and Romania, however, the Commercial Source Access indicator (CSA) does not show an increase in the number of supply sources for these countries, since they exceed the threshold applied by ENTSOG to this supply source. The project group increases the cooperation in the area and improves diversification of supply sources, while increasing the access to Romanian National Production.

In the low and advanced infrastructure levels, FID and advanced projects allow the project group to further spread this supply source and to reach also other European countries and therefore, increase the access to Romanian National Production in other European countries.

Additionally, by enabling the connection to the new Romanian indigenous gas production and increasing transmission capacities between Romania and Bulgaria, the project group realisation also increases diversification of Eastern Europe and allows to **reduce the dependence from Russian** and to a lesser extent other supply sources such as **LNG**. More specifically, the project group **decreases the dependence of Russian gas** for Bulgaria, Romania and North Macedonia in 2025 in the existing and low Infrastructure levels, Hungary in 2030 in the low infrastructure level and also Romania in 2030 and 2040 (in the existing infrastructure level only). In the advanced infrastructure level, the project group decreases the Russian gas dependence of South-eastern countries in 2025, as for Global Ambition demand scenario from 2030 Russian dependence is aligned in most European countries thanks to the implementation of advanced-status infrastructure.

> Market integration:

The projects group **increases bidirectionality** between Bulgaria and Romania and between Hungary and Romania.

The project group brings benefits in monetised term as a **reduction of the cost of gas supply**. In the reference supply price configuration this can be estimated around 208 MEur/y (on average) in the existing infrastructure level. Such benefits are driven by the fact that the project group allows some European countries to benefit from Romanian National Production.

Also, in case of expensive Russian gas supply price configuration, the project group brings additional benefits compared with the reference situation (265 MEur/y on average in the existing infrastructure level). Such benefits are driven by the fact that the project group allows some countries to rely on Romanian National production in case of expensive Russian gas prices. Benefits from supply cost savings are even higher in the low and advanced infrastructure levels, as FID and advanced projects allow Romanian indigenous production to reach more European countries. Such increase is lower for the advanced level, as projects considered in this infrastructure level have already reduced the overall cost of European supply.

Sustainability benefits explained [ENTSOG]

Project groups EAST_12B does not show significant benefits from fuel switch under flow-based allocation. However, it must be noted that savings have been allocated to the project group based on the flows resulting from ENSTOG simulations under the reference supply price configurations and according to the methodology described in TYNDP 2020 Annex D. Such methodology is also based on the assumption that the use of the infrastructures already included in the different infrastructure levels (versus which the project group is assessed) is always prioritised. This second additional assumption explains why the project groups does not bring benefits under this allocation mechanism. Nevertheless, it should also be considered that the project group is used when considering only the flows resulting from the simulations under the reference supply price configurations. This can be observed by looking at the results in section C.3. where the project brings significant benefits in terms of reduction of the cost of gas supply (under both reference supply price configuration and supply maximisation configuration).

Sustainability benefits explained [Project Promoter]

No additional benefits were provided by promoters.

C.2 Quantitative benefits [ENTSOG]

The following tables display all the benefits quantified by ENTSOG through specific indicators and stemming from the realisation of the considered project group. Some of those benefits are measured through quantitative indicators (i.e. SLID and Curtailment rate) and monetised ex-post. Their monetised value is displayed in section E. When assessing those type of benefits, it is important to avoid any double counting considering them both in quantitative and monetised terms.


EXISTING Infrastructure Level – National Trends

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|---|-----|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| | | BE | | | CBG | | | GBC | | | NT | | | NT | | |
| Row Labels | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| Bosnia Herzegovina | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| Bulgaria | 1 | | 2 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| Croatia | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| Germany | | | | | | | | | | | | | | 2 | 3 | 1 |
| Hungary | | | | | 2 | 3 | 1 | 2 | 3 | 1 | | | | | | |
| North Noth Macedonia | | | | | | | | 2 | 3 | 1 | | | | | | |
| Romania | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| Serbia | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| Hungary | | | | | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 |
| MASD-RU | | | | | | | | | | | | | | | | |
| Austria | | | | | 43% | 40% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Bosnia Herzegovina | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Bulgaria | 48% | | 29% | -20% | 24% | 11% | -14% | 26% | 15% | -12% | | | | | | |
| Croatia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Czech Republic | | | | | 43% | 40% | -3% | | | | 43% | 40% | -3% | | | |
| Denmark | | | | | 43% | 40% | -3% | 45% | 42% | -3% | 42% | 39% | -3% | | | |
| Germany | | | | | 41% | 38% | -3% | 43% | 41% | -3% | 42% | 39% | -3% | | | |
| Hungary | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| North Noth Macedonia | 49% | | 29% | -20% | 25% | 11% | -14% | 27% | 14% | -13% | | | | | | |
| Poland | | | | | | | | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Romania | | | | | 29% | 6% | -23% | 31% | 8% | -23% | 43% | 39% | -4% | 55% | 45% | -10% |
| Serbia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Slovakia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Slovenia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 43% | 40% | -3% | | | |
| Sweden | | | | | 43% | 40% | -3% | 45% | 42% | -3% | 42% | 39% | -3% | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| Romania | 89% | | 92% | 3% | 65% | 100% | 35% | 65% | 100% | 35% | 62% | 100% | 38% | 34% | 52% | 18% |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| Romania | | | | | 65% | 100% | 35% | 65% | 100% | 35% | 54% | 92% | 38% | 32% | 50% | 18% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| France | | | | | | | | 45% | 52% | 7% | | | | 73% | 76% | 3% |
| Germany | | | | | 35% | 39% | 4% | 25% | 29% | 4% | 35% | 37% | 3% | 26% | 28% | 1% |
| Hungary | | | | | 72% | 88% | 15% | 64% | 78% | 15% | | | | | | |
| Netherlands | | | | | 60% | 66% | 6% | 44% | 50% | 7% | | | | 68% | 71% | 3% |
| Romania | 55% | | 58% | 3% | 43% | 89% | 46% | 42% | 89% | 46% | 32% | 65% | 32% | 14% | 30% | 16% |
| Slovenia | | | | | | | | | | | | | | 39% | 41% | 2% |
| Single Largest Infrastructure Disruption (SLID)-Romania | | | | | | | | | | | | | | | | |
| Romania | | | | | | | | | | | 5% | 0% | -5% | 21% | 6% | -16% |
| Ukraine Disruption Curtailment Rate 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| Romania | | | | | | | | | | | -6% | 0% | 6% | -28% | -9% | 18% |
| Ukraine Disruption Curtailment Rate 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| Romania | | | | | | | | | | | -10% | 0% | 10% | -29% | -10% | 18% |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | |
| Bosnia Herzegovina | -4% | | -2% | 2% | | | | | | | | | | | | |
| Croatia | -4% | | -2% | 2% | | | | -4% | -1% | 3% | | | | | | |
| Hungary | | | | | | | | -3% | 0% | 3% | | | | | | |
| Romania | -3% | | -2% | 1% | -11% | 0% | 11% | -11% | 0% | 11% | -22% | 0% | 22% | -38% | -22% | 16% |
| Serbia | -4% | | -2% | 2% | | | | | | | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| BI-directionality - Country | | | | | | | | | | | | | | | | |
| BGn <=> RO | 6% | | 85% | 79% | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% |
| HU <=> RO | | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| BI-directionality - Point | | | | | | | | | | | | | | | | |
| Csanadpalota | | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| Ruse (BG) / Giurgiu (RO) | 20% | | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

LOW Infrastructure Level – National Trends

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|--|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| Row Labels | | BE | | | CBG | | | GBC | | | NT | | | NT | | |
| | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Bulgaria | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Greece | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | North Noth Macedonia | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | Romania | | | | 3 | 4 | 1 | 2 | 4 | 2 | 3 | 4 | 1 | 2 | 3 | 1 |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 |
| MASD-LNGall | | | | | | | | | | | | | | | | |
| | Croatia | | | | | | | 14% | 11% | -3% | | | | | | |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 31% | 28% | -3% | 34% | 32% | -2% | 31% | 28% | -3% | | | |
| | Bosnia Herzegovina | | | | 24% | 17% | -7% | 28% | 20% | -8% | | | | | | |
| | Bulgaria | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Czech Republic | | | | 31% | 28% | -3% | 34% | 31% | -3% | 31% | 28% | -3% | | | |
| | Germany | | | | 30% | 28% | -2% | 33% | 31% | -2% | 30% | 28% | -3% | | | |
| | Hungary | | | | 31% | 28% | -3% | | | | 31% | 28% | -3% | | | |
| | North Noth Macedonia | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Romania | | | | 29% | 14% | -15% | 31% | 16% | -15% | 31% | 28% | -3% | 55% | 31% | -24% |
| | Serbia | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Slovenia | | | | | | | | | | 31% | 28% | -3% | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | 70% | 100% | 30% | 41% | 60% | 18% |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | 62% | 99% | 38% | 40% | 58% | 18% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | France | | | | | | | 45% | 52% | 7% | | | | 73% | 77% | 4% |
| | Germany | | | | 35% | 39% | 4% | 26% | 29% | 4% | 36% | 38% | 2% | 26% | 27% | 2% |
| | Hungary | | | | | | | 90% | 100% | 10% | | | | | | |
| | Netherlands | | | | | | | 44% | 51% | 7% | | | | 66% | 70% | 4% |
| | Romania | | | | 43% | 89% | 46% | 42% | 89% | 46% | 39% | 73% | 33% | 21% | 37% | 16% |
| Single Largest Infrastructure Disruption (SLID)-Romania | | | | | | | | | | | | | | | | |
| | Romania | | | | | | | | | | | | | 14% | 0% | -14% |
| Ukraine Disruption Curtailment Rate 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | | | | | | | | | | -20% | -2% | 18% |
| Ukraine Disruption Curtailment Rate 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Romania | | | | | | | | | | -2% | 0% | 2% | -21% | -3% | 18% |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | -11% | 0% | 11% | -11% | 0% | 11% | -15% | 0% | 15% | -31% | -15% | 16% |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

ADVANCED Infrastructure Level – National Trends

| Sum of Value | | Column Labels  | | | | | | | | | | | | | | |
|---|--------------------------|---|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| | | BE | | | CBG | | | GBC | | | NT | | | NT | | |
| Row Labels | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Bulgaria | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Greece | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | North Noth Macedonia | | | | 3 | 4 | 1 | 2 | 3 | 1 | 3 | 4 | 1 | | | |
| | Romania | | | | | | | | | | 3 | 4 | 1 | | | |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 7,085 | 4,626 | -2,459 | 7,037 | 4,581 | -2,456 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,061 | 2,405 | -657 | 2,815 | 2,221 | -593 |
| | Romania | | | | | | | | | | 3,716 | 3,394 | -322 | 3,716 | 3,394 | -322 |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 25% | 22% | -3% | | | | | | | | | |
| | Belgium | | | | | | | 28% | 26% | -2% | | | | | | |
| | Bosnia Herzegovina | | | | 25% | 21% | -4% | 28% | 25% | -3% | | | | | | |
| | Bulgaria | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Croatia | | | | 24% | 22% | -2% | 28% | 25% | -3% | | | | | | |
| | Czech Republic | | | | 25% | 22% | -3% | | | | | | | | | |
| | France | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Greece | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Hungary | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | North Noth Macedonia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Poland | | | | 25% | 22% | -3% | | | | | | | | | |
| | Romania | | | | 25% | 21% | -4% | 28% | 25% | -3% | 19% | 16% | -3% | | | |
| | Serbia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Slovakia | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | Slovenia | | | | 25% | 22% | -3% | | | | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 81% | 84% | 2% | 74% | 76% | 2% | | | | | | |
| | Romania | | | | 78% | 100% | 22% | 78% | 100% | 22% | | | | 78% | 97% | 18% |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Croatia | | | | 77% | 79% | 2% | 71% | 72% | 2% | | | | | | |
| | Romania | | | | 77% | 100% | 23% | 77% | 100% | 23% | 99% | 100% | 1% | 76% | 94% | 18% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 68% | 70% | 2% | 62% | 64% | 2% | | | | | | |
| | Germany | | | | 44% | 48% | 4% | 35% | 39% | 4% | | | | | | |
| | Hungary | | | | | | | 96% | 100% | 4% | | | | | | |
| | Romania | | | | 54% | 100% | 46% | 53% | 100% | 46% | 72% | 100% | 28% | 52% | 68% | 16% |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

EXISTING Infrastructure Level – Distributed Energy

| Sum of Value | | | Column Labels | | | | | | | | | | | | | | |
|--|--------------------------|-----|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| | | | BE | | | CBG | | | GBC | | | DE | | | DE | | |
| Row Labels | | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | Bulgaria | 1 | 2 | 1 | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | Croatia | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | Hungary | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | North Noth Macedonia | | | | | | | | 2 | 3 | 1 | | | | | | |
| | Romania | | | | | 2 | 3 | 1 | 2 | 3 | 1 | | | | | | |
| | Serbia | | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | | |
| | Hungary | | | | | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 |
| MASD-RU | | | | | | | | | | | | | | | | | |
| | Austria | | | | | 43% | 40% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Bosnia Herzegovina | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Bulgaria | 48% | 29% | -20% | | 24% | 11% | -14% | 26% | 15% | -12% | | | | | | |
| | Croatia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Czech Republic | | | | | 43% | 40% | -3% | | | | 42% | 39% | -3% | | | |
| | Denmark | | | | | 43% | 40% | -3% | 45% | 42% | -3% | | | | | | |
| | Germany | | | | | 41% | 38% | -3% | 43% | 41% | -3% | 41% | 38% | -3% | | | |
| | Hungary | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | North Noth Macedonia | 49% | 29% | -20% | | 25% | 11% | -14% | 27% | 14% | -13% | | | | | | |
| | Poland | | | | | | | | 46% | 43% | -3% | 42% | 40% | -2% | | | |
| | Romania | | | | | 29% | 6% | -23% | 31% | 8% | -23% | 17% | 12% | -6% | | | |
| | Serbia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Slovakia | | | | | 44% | 41% | -3% | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Slovenia | | | | | | | | 46% | 43% | -3% | 42% | 39% | -3% | | | |
| | Sweden | | | | | 43% | 40% | -3% | 45% | 42% | -3% | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | | |
| | Romania | 89% | 92% | 3% | | 65% | 100% | 35% | 65% | 100% | 35% | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | | |
| | Romania | | | | | 65% | 100% | 35% | 65% | 100% | 35% | | | | 72% | 94% | 22% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | | |
| | France | | | | | | | | 45% | 52% | 7% | | | | | | |
| | Germany | | | | | 35% | 39% | 4% | 25% | 29% | 4% | 57% | 57% | 1% | | | |
| | Hungary | | | | | 72% | 88% | 15% | 64% | 78% | 15% | | | | | | |
| | Netherlands | | | | | 60% | 66% | 6% | 44% | 50% | 7% | 77% | 78% | 1% | | | |
| | Romania | 55% | 58% | 3% | | 43% | 89% | 46% | 42% | 89% | 46% | 85% | 100% | 15% | 68% | 88% | 20% |
| Ukraine Disruption Curtailment Rate 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | | |
| | Romania | | | | | | | | | | | | | | -2% | 0% | 2% |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | -4% | -2% | 2% | | | | | | | | | | | | | |
| | Croatia | -4% | -2% | 2% | | | | | -4% | -1% | 3% | | | | | | |
| | Hungary | | | | | | | | -3% | 0% | 3% | | | | | | |
| | Romania | -3% | -2% | 1% | | -11% | 0% | 11% | -11% | 0% | 11% | | | | | | |
| | Serbia | -4% | -2% | 2% | | | | | | | | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% |
| | HU <=> RO | | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

LOW Infrastructure Level – Distributed Energy

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|---|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| Row Labels | | BE | | | CBG | | | GBC | | | DE | | | DE | | |
| | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Bulgaria | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | | | |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Greece | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | | | |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | North North Macedonia | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | | | |
| | Romania | | | | 3 | 4 | 1 | 2 | 4 | 2 | | | | | | |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 |
| MASD-LNGall | | | | | | | | | | | | | | | | |
| | Croatia | | | | | | | 14% | 11% | -3% | | | | | | |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 31% | 28% | -3% | 34% | 32% | -2% | | | | | | |
| | Bosnia Herzegovina | | | | 24% | 17% | -7% | 28% | 20% | -8% | | | | | | |
| | Bulgaria | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Croatia | | | | | | | | | | 17% | 14% | -3% | | | |
| | Czech Republic | | | | 31% | 28% | -3% | 34% | 31% | -3% | | | | | | |
| | Germany | | | | 30% | 28% | -2% | 33% | 31% | -2% | | | | | | |
| | Hungary | | | | 31% | 28% | -3% | | | | 29% | 14% | -15% | | | |
| | North North Macedonia | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Romania | | | | 29% | 14% | -15% | 31% | 16% | -15% | 17% | 14% | -3% | | | |
| | Serbia | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | | | | 81% | 100% | 19% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | France | | | | | | | 45% | 52% | 7% | | | | | | |
| | Germany | | | | 35% | 39% | 4% | 26% | 29% | 4% | 52% | 52% | 1% | | | |
| | Hungary | | | | | | | 90% | 100% | 10% | | | | | | |
| | Netherlands | | | | | | | 44% | 51% | 7% | | | | | | |
| | Romania | | | | 43% | 89% | 46% | 42% | 89% | 46% | 95% | 100% | 5% | 77% | 97% | 20% |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | -11% | 0% | 11% | -11% | 0% | 11% | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

ADVANCED Infrastructure Level – Distributed Energy

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|---|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| Row Labels | | BE | | | CBG | | | GBC | | | DE | | | DE | | |
| | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Bulgaria | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Greece | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | North Noth Macedonia | | | | 3 | 4 | 1 | 2 | 3 | 1 | 3 | 4 | 1 | | | |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 6,791 | 4,365 | -2,426 | 6,928 | 4,482 | -2,447 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 2,879 | 2,268 | -611 | 2,803 | 2,213 | -590 |
| | Romania | | | | | | | | | | 3,716 | 3,394 | -322 | 3,716 | 3,394 | -322 |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 25% | 22% | -3% | | | | | | | | | |
| | Belgium | | | | | | | 28% | 26% | -2% | | | | | | |
| | Bosnia Herzegovina | | | | 25% | 21% | -4% | 28% | 25% | -3% | | | | | | |
| | Bulgaria | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Croatia | | | | 24% | 22% | -2% | 28% | 25% | -3% | | | | | | |
| | Czech Republic | | | | 25% | 22% | -3% | | | | | | | | | |
| | France | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Greece | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Hungary | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | North Noth Macedonia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Poland | | | | 25% | 22% | -3% | | | | | | | | | |
| | Romania | | | | 25% | 21% | -4% | 28% | 25% | -3% | | | | | | |
| | Serbia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Slovakia | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | Slovenia | | | | 25% | 22% | -3% | | | | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 81% | 84% | 2% | 74% | 76% | 2% | | | | | | |
| | Romania | | | | 78% | 100% | 22% | 78% | 100% | 22% | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Croatia | | | | 77% | 79% | 2% | 71% | 72% | 2% | | | | | | |
| | Romania | | | | 77% | 100% | 23% | 77% | 100% | 23% | | | | | | |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 68% | 70% | 2% | 62% | 64% | 2% | | | | | | |
| | Germany | | | | 44% | 48% | 4% | 35% | 39% | 4% | | | | | | |
| | Hungary | | | | | | | 96% | 100% | 4% | | | | | | |
| | Romania | | | | 54% | 100% | 46% | 53% | 100% | 46% | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

EXISTING Infrastructure Level – Global Ambition

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|---|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| | | BE | | | CBG | | | GBC | | | GA | | | GA | | |
| Row Labels | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Austria | | | | | | | | | | | | | 2 | 3 | 1 |
| | Bosnia Herzegovina | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| | Bulgaria | 1 | 2 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | | | | |
| | Croatia | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| | Germany | | | | | | | | | | | | | 2 | 3 | 1 |
| | Hungary | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| | North Noth Macedonia | | | | | | | 2 | 3 | 1 | | | | | | |
| | Romania | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | | | |
| | Serbia | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 3 | 1 |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Hungary | | | | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 | 4,532 | 3,158 | -1,374 |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 43% | 40% | -3% | 46% | 43% | -3% | 47% | 44% | -3% | | | |
| | Bosnia Herzegovina | | | | 44% | 41% | -3% | 46% | 43% | -3% | 48% | 44% | -4% | | | |
| | Bulgaria | 48% | 29% | -20% | 24% | 11% | -14% | 26% | 15% | -12% | | | | | | |
| | Croatia | | | | 44% | 41% | -3% | 46% | 43% | -3% | 47% | 44% | -3% | | | |
| | Czech Republic | | | | 43% | 40% | -3% | | | | | | | | | |
| | Denmark | | | | 43% | 40% | -3% | 45% | 42% | -3% | 47% | 44% | -3% | | | |
| | Germany | | | | 41% | 38% | -3% | 43% | 41% | -3% | 46% | 44% | -2% | | | |
| | Hungary | | | | 44% | 41% | -3% | 46% | 43% | -3% | 47% | 44% | -3% | | | |
| | North Noth Macedonia | 49% | 29% | -20% | 25% | 11% | -14% | 27% | 14% | -13% | | | | | | |
| | Poland | | | | | | | 46% | 43% | -3% | 48% | 45% | -3% | | | |
| | Romania | | | | 29% | 6% | -23% | 31% | 8% | -23% | 28% | 24% | -4% | | | |
| | Serbia | | | | 44% | 41% | -3% | 46% | 43% | -3% | 48% | 44% | -4% | | | |
| | Slovakia | | | | 44% | 41% | -3% | 46% | 43% | -3% | | | | | | |
| | Slovenia | | | | | | | 46% | 43% | -3% | 47% | 44% | -3% | | | |
| | Sweden | | | | 43% | 40% | -3% | 45% | 42% | -3% | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Romania | 89% | 92% | 3% | 65% | 100% | 35% | 65% | 100% | 35% | 90% | 100% | 10% | 90% | 100% | 10% |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | 88% | 100% | 12% | 76% | 99% | 22% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | France | | | | | | | 45% | 52% | 7% | 28% | 29% | 1% | 50% | 52% | 2% |
| | Germany | | | | 35% | 39% | 4% | 25% | 29% | 4% | | | | 25% | 26% | 1% |
| | Hungary | | | | 72% | 88% | 15% | 64% | 78% | 15% | | | | | | |
| | Netherlands | | | | 60% | 66% | 6% | 44% | 50% | 7% | 34% | 35% | 1% | 61% | 63% | 2% |
| | Romania | 55% | 58% | 3% | 43% | 89% | 46% | 42% | 89% | 46% | 72% | 100% | 28% | 65% | 86% | 21% |
| | United Kingdom | | | | | | | | | | 26% | 26% | 1% | | | |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | -4% | -2% | 2% | | | | | | | | | | | | |
| | Croatia | -4% | -2% | 2% | | | | -4% | -1% | 3% | | | | | | |
| | Hungary | | | | | | | -3% | 0% | 3% | | | | | | |
| | Romania | -3% | -2% | 1% | -11% | 0% | 11% | -11% | 0% | 11% | | | | -4% | 0% | 4% |
| | Serbia | -4% | -2% | 2% | | | | | | | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% | 6% | 99% | 92% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

LOW Infrastructure Level – Global Ambition

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|--|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| Row Labels | | BE | | | CBG | | | GBC | | | GA | | | GA | | |
| | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| | Bulgaria | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | | | |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 |
| | Greece | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | 3 | 4 | 1 |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 |
| | North North Macedonia | | | | 2 | 3 | 1 | 2 | 3 | 1 | 2 | 4 | 2 | | | |
| | Romania | | | | 3 | 4 | 1 | 2 | 4 | 2 | 3 | 4 | 1 | | | |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | 3 | 4 | 1 | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 |
| MASD-LNGall | | | | | | | | | | | | | | | | |
| | Croatia | | | | | | | 14% | 11% | -3% | | | | | | |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 31% | 28% | -3% | 34% | 32% | -2% | | | | | | |
| | Bosnia Herzegovina | | | | 24% | 17% | -7% | 28% | 20% | -8% | 27% | 24% | -3% | | | |
| | Bulgaria | | | | 24% | 18% | -6% | 28% | 21% | -7% | | | | | | |
| | Croatia | | | | | | | | | | 30% | 24% | -6% | | | |
| | Czech Republic | | | | 31% | 28% | -3% | 34% | 31% | -3% | | | | | | |
| | Germany | | | | 30% | 28% | -2% | 33% | 31% | -2% | | | | | | |
| | Hungary | | | | 31% | 28% | -3% | | | | 34% | 24% | -10% | | | |
| | North North Macedonia | | | | 24% | 18% | -6% | 28% | 21% | -7% | 27% | 24% | -3% | | | |
| | Romania | | | | 29% | 14% | -15% | 31% | 16% | -15% | 28% | 24% | -4% | | | |
| | Serbia | | | | 24% | 18% | -6% | 28% | 21% | -7% | 27% | 24% | -3% | | | |
| | Slovenia | | | | | | | | | | 29% | 25% | -4% | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | 99% | 100% | 1% | 99% | 100% | 1% |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Romania | | | | 65% | 100% | 35% | 65% | 100% | 35% | 98% | 100% | 2% | 86% | 100% | 14% |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | Belgium | | | | | | | | | | 51% | 53% | 3% | | | |
| | France | | | | | | | 45% | 52% | 7% | 19% | 20% | 1% | 43% | 44% | 1% |
| | Germany | | | | 35% | 39% | 4% | 26% | 29% | 4% | 11% | 11% | 1% | 22% | 22% | 1% |
| | Hungary | | | | | | | 90% | 100% | 10% | | | | | | |
| | Italy | | | | | | | | | | 14% | 15% | 1% | 34% | 35% | 1% |
| | Netherlands | | | | | | | 44% | 51% | 7% | 23% | 24% | 1% | 52% | 53% | 1% |
| | Romania | | | | 43% | 89% | 46% | 42% | 89% | 46% | 81% | 100% | 19% | 75% | 98% | 23% |
| | United Kingdom | | | | | | | | | | 17% | 18% | 1% | | | |
| Single Largest Infrastructure Disruption (SLID)-United Kingdom | | | | | | | | | | | | | | | | |
| | Ireland | | | | | | | | | | 4% | 2% | -2% | | | |
| Ukraine Disruption Curtailment Rate Peak Day (%) | | | | | | | | | | | | | | | | |
| | Romania | | | | -11% | 0% | 11% | -11% | 0% | 11% | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

ADVANCED Infrastructure Level – Global Ambition

| Sum of Value | | Column Labels | | | | | | | | | | | | | | |
|---|--------------------------|---------------|------|-------|---------|-------|--------|---------|-------|--------|---------|-------|--------|---------|-------|--------|
| | | 2020 | | | 2025 | | | 2030 | | | 2040 | | | | | |
| Row Labels | | BE | | | CBG | | | GBC | | | GA | | | GA | | |
| | | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA | WITHOUT | WITH | DELTA |
| Competition | | | | | | | | | | | | | | | | |
| Commercial Supply Access (CSA) | | | | | | | | | | | | | | | | |
| | Bosnia Herzegovina | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Bulgaria | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Croatia | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Cyprus | | | | | | | | | | | | | 4 | 5 | 1 |
| | Greece | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | Hungary | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| | North North Macedonia | | | | 3 | 4 | 1 | 2 | 3 | 1 | | | | | | |
| | Serbia | | | | 3 | 4 | 1 | 3 | 4 | 1 | | | | | | |
| LNG and Interconnection Capacity Diversification (LICD) | | | | | | | | | | | | | | | | |
| | Bulgaria | | | | 8,590 | 5,724 | -2,866 | 8,590 | 5,724 | -2,866 | 6,826 | 4,394 | -2,432 | 6,912 | 4,467 | -2,445 |
| | Hungary | | | | 3,746 | 2,754 | -991 | 3,746 | 2,754 | -991 | 2,881 | 2,269 | -612 | 2,822 | 2,227 | -596 |
| | Romania | | | | | | | | | | 3,716 | 3,394 | -322 | 3,716 | 3,394 | -322 |
| MASD-RU | | | | | | | | | | | | | | | | |
| | Austria | | | | 25% | 22% | -3% | | | | | | | | | |
| | Belgium | | | | | | | 28% | 26% | -2% | | | | | | |
| | Bosnia Herzegovina | | | | 25% | 21% | -4% | 28% | 25% | -3% | | | | | | |
| | Bulgaria | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Croatia | | | | 24% | 22% | -2% | 28% | 25% | -3% | | | | | | |
| | Czech Republic | | | | 25% | 22% | -3% | | | | | | | | | |
| | France | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Greece | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Hungary | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | North North Macedonia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Poland | | | | 25% | 22% | -3% | | | | | | | | | |
| | Romania | | | | 25% | 21% | -4% | 28% | 25% | -3% | | | | | | |
| | Serbia | | | | 24% | 21% | -3% | 28% | 25% | -3% | | | | | | |
| | Slovakia | | | | 25% | 22% | -3% | 29% | 26% | -3% | | | | | | |
| | Slovenia | | | | 25% | 22% | -3% | | | | | | | | | |
| Security of Supply | | | | | | | | | | | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 81% | 84% | 2% | 74% | 76% | 2% | | | | | | |
| Remaining Flexibility 2-Week Cold Spell (%) --- DF | | | | | | | | | | | | | | | | |
| | Croatia | | | | 77% | 79% | 2% | 71% | 72% | 2% | | | | | | |
| Remaining Flexibility Peak day (%) | | | | | | | | | | | | | | | | |
| | Croatia | | | | 68% | 70% | 2% | 62% | 64% | 2% | | | | | | |
| | Germany | | | | 44% | 48% | 4% | 35% | 39% | 4% | | | | | | |
| | Hungary | | | | | | | 96% | 100% | 4% | | | | | | |
| | Romania | | | | 54% | 100% | 46% | 53% | 100% | 46% | | | | | | |
| Market Integration | | | | | | | | | | | | | | | | |
| Bi-directionality - Country | | | | | | | | | | | | | | | | |
| | BGn <=> RO | 6% | 85% | 79% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% | 6% | 61% | 55% |
| | HU <=> RO | | | | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% | 5% | 98% | 93% |
| Bi-directionality - Point | | | | | | | | | | | | | | | | |
| | Csanadpalota | | | | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% | 5% | 100% | 95% |
| | Ruse (BG) / Giurgiu (RO) | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% | 20% | 100% | 80% |

C.3 Monetised benefits [ENTSOG]

This section includes all benefits stemming from the realisation of a project that are quantified and monetised. Some benefits are monetised ex-post while others directly as a result of the simulations and are impacted by the modelling assumptions chosen (e.g. tariffs or supply price assumptions). Monetised benefits are showed at EU level. In order to keep the results in a manageable number, those have been aggregated per Infrastructure Level and Demand Scenarios. In line with the CBA Methodology, promoters could provide additional benefits related to Sustainability or Gasification. In the tables below these benefits are displayed separately from the ones computed directly by ENTSOG and are labelled as “(Promoter)”. More information on how to read the data in this section is provided in the Introduction Document.

| | | EXISTING | | | LOW | | | ADVANCED | | |
|----------------------------------|-------------------------------------|--------------------|-----------------------|--------------------|--------------------|-----------------------|--------------------|--------------------|-----------------------|--------------------|
| Benefits (Meur/year) | | NATIONAL TRENDS | DISTRIBUTED ENERGY | GLOBAL AMBITION | NATIONAL TRENDS | DISTRIBUTED ENERGY | GLOBAL AMBITION | NATIONAL TRENDS | DISTRIBUTED ENERGY | GLOBAL AMBITION |
| EU Bill benefits With Tariffs | Reference Supply | 207.6 | 195.0 | 207.7 | 236.9 | 217.9 | 239.3 | 232.2 | 217.5 | 233.1 |
| | Supply Maximization | 263.9 | 247.5 | 265.4 | 296.7 | 269.0 | 298.1 | 281.2 | 258.9 | 284.1 |
| Security of Supply | Design Case | 4.7 | 0.7 | 1.0 | 4.3 | 0.7 | 1.1 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell | 20.8 | 0.0 | 0.0 | 24.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell DF | 25.1 | 2.1 | 0.4 | 18.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sustainability | CO2 and Other externalities savings | 0/0 | 0.1/0.1 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| | Additional benefit (Promoter) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Comparison between the assessed SCENARIOS

ENTSOG runs the assessment for 5-year-rounded years (2020, 2025, 2030 and 2040) and interpolates these results to compute the benefits for the 25-years economic lifetime of projects. The following tables show the benefits as computed in the specific assessment years.

| Year of assessment | | 2020 | | | | | | | | | 2025 | | | | | | | | |
|----------------------------------|-------------------------------------|----------|------|------|-----|-----|-----|----------|-----|-----|----------|-------|-------|-------|-------|-------|----------|-------|-------|
| | | EXISTING | | | LOW | | | ADVANCED | | | EXISTING | | | LOW | | | ADVANCED | | |
| Benefits (Meur/year) | | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA |
| EU Bill benefits With Tariffs | Reference Supply | 36.1 | 36.1 | 36.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 485.3 | 485.3 | 485.3 | 473.4 | 473.4 | 473.4 | 480.5 | 480.5 | 480.5 |
| | Supply Maximization | 38.4 | 38.4 | 38.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 618.1 | 618.1 | 618.1 | 591.5 | 591.5 | 591.5 | 591.2 | 591.2 | 591.2 |
| Security of Supply | Design Case | 0.5 | 0.5 | 0.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.2 | 32.3 | 3.2 | 2.3 | 2.3 | 2.3 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell DF | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sustainability | CO2 and Other externalities savings | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| | Additional benefit (Promoter) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

| Year of assessment | | 2030 | | | | | | | | | 2040 | | | | | | | | |
|----------------------------------|-------------------------------------|----------|-------|-------|-------|-------|-------|----------|-------|-------|----------|------|------|------|------|------|----------|------|------|
| | | EXISTING | | | LOW | | | ADVANCED | | | EXISTING | | | LOW | | | ADVANCED | | |
| Benefits (Meur/year) | | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA | NT | DE | GA |
| EU Bill benefits With Tariffs | Reference Supply | 273.5 | 257.4 | 276.2 | 268.1 | 235.3 | 277.7 | 248.3 | 220.4 | 255.5 | 71.2 | 48.2 | 69.1 | 70.5 | 43.5 | 69.0 | 68.0 | 49.5 | 64.3 |
| | Supply Maximization | 350.4 | 326.1 | 357.3 | 337.1 | 286.7 | 343.4 | 289.7 | 251.7 | 308.7 | 90.0 | 63.2 | 88.3 | 88.2 | 51.0 | 86.7 | 84.5 | 52.5 | 76.3 |
| Security of Supply | Design Case | 5.5 | 0.0 | 0.0 | 3.1 | 0.0 | 2.1 | 0.0 | 0.0 | 0.0 | 6.7 | 0.0 | 0.6 | 6.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell | 12.8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 46.9 | 0.0 | 0.0 | 46.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| | 2-weeks Cold Spell DF | 24.1 | 0.0 | 0.0 | 5.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 46.9 | 4.1 | 0.8 | 46.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Sustainability | CO2 and Other externalities savings | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 | 0/0 |
| | Additional benefit (Promoter) | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |

In line with ENTSG Adapted 2nd CBA Methodology, ENTSG has also run sensitivities on some relevant assumptions such as tariffs, commissioning year and lower supply source price differential. The results included in the tables below have to be compared with the ones included in section C.3. Further information is available in the common introduction (Pages 1-6) to all project fiches. Independently from the source of the input as described in C3 (ENTSG or Promoter), the sensitivity analysis has been carried out by ENTSG and according to the criteria in the approved CBA Methodology.

[illegible]

D. Environmental Impact [Promoter]

Any gas infrastructure has an impact on its surroundings. This impact is of particular relevance when crossing some environmentally sensitive areas. Mitigation measures are taken by the promoters to reduce this impact and comply with the EU and National regulations. The Tables have been filled in by the promoter.

| TYNDP Code | Type of infrastructure | Surface of impact | Environmentally sensitive area |
|--------------------------|----------------------------------|--|--------------------------------|
| TRA-F-358 and TRA-A-1322 | Pipeline and compressor stations | The total area of land which will be occupied by the works for the construction of the investment objective is of approximately 1085 ha, out of which the temporary occupied area is of approximately 1073 ha, and the permanently occupied area is of approximately 12 ha. | Total surface: 147.8 ha. |
| TRA-A-362 | 308 km pipeline length | The total area of land which will be occupied by the works for the construction of the investment objective is of approximately 690,7 ha, out of which the temporary occupied area is of approximately 689,4 ha, and the permanently occupied area is of approximately 1,3 ha. | Total surface: 25 ha. |

| Potential impact | Mitigation measures | Related costs included in project CAPEX and OPEX | Additional expected costs |
|---|---|--|---------------------------|
| Air | Compressor units equipped with SOLONOX system | included the project CAPEX, OPEX | No |
| Noise effect | Units will be installed indoor, and each compressor unit will be cased. Also Transgaz requested that at the Compressor Station fence the noise limit must not exceed the legal requirements. | included the project CAPEX, OPEX | No |
| The impact on environmental factors shall have various intensities, which are however short and express themselves only in the areas of the execution works; through the measures proposed in the report on the evaluation of the impact and the adequate evaluation study, the impact shall be significantly reduced, both during the execution periods, as well as during the exploitation period | Water protection measures/ Air protection measures / Soil and underoil protection measures / Protection measures against noise / Measures regarding waste management / Measures regarding the management of dangerous substances and chemicals / Measures related to framing in the landscape / Measures for the protection of the biodiversity | Included in CAPEX and OPEX | NO |

Environmental Impact explained [Promoter]

Environmental impact assessments for the projects have not indicated any substantial and irreversible impacts on the environment. In order to ensure that environmental assessments are correct, environmental monitoring is carried out before, during and after the construction of the infrastructure.

See the table above.

For TRA-F-358, TRA-N-1322 and TRA-N-362 there were obtained all the Environmental Agreements.

E. Other Benefits [Promoter]

Missing benefits are all benefits of a project which may be not captured by the current application in TYNDP 2020 of the 2nd CBA Methodology.

As a necessary condition a missing benefit cannot have discrepancies with the benefits already covered by the assessment run by ENTSOG and this condition needs to be proved and justified.

Other benefits explained

The Project group established IP capacity up to 4.4 bcma at Csanádpalota in RO>HU and HU>RO direction. Increase in the security of gas supply by enabling the EU gas markets' access to new gas sources, including EU ones.

F. Useful Links

The project website:

TRA-F-358 : <https://www.transgaz.ro/ro/dezvoltarea-pe-teritoriul-romaniei-sistemului-national-de-transport-gaze-pe-coridorul-conductei-de>
<http://www.transgaz.ro/en/project-brha-management-documents>

TRA-A-1322 : <https://www.transgaz.ro/ro/extinderea-capacitatii-de-transport-gazelor-naturale-din-romania-catre-ungaria-pana-la-44-mldmcan>
<http://www.transgaz.ro/en/expansion-transmission-capacity-romania-towards-hungary-44-bcmyear-2nd-phase>

TRA-A-362 : <https://www.transgaz.ro/ro/conducta-tarmul-marii-negre-podisor-ro-pentru-preluarea-gazului-din-marea-neagra>

HU: <https://fgsz.hu/en/about-fgsz/activities-business-policy/international-projects/brua>

Network Development Plan:

RO: <https://www.transgaz.ro/sites/default/files/uploads/users/admin/Plan%20dezvoltare%202019%20-%202028.pdf>

HU: https://fgsz.hu/file/documents/1/1743/2020_07_09_ten_year_network_development_plan.pdf