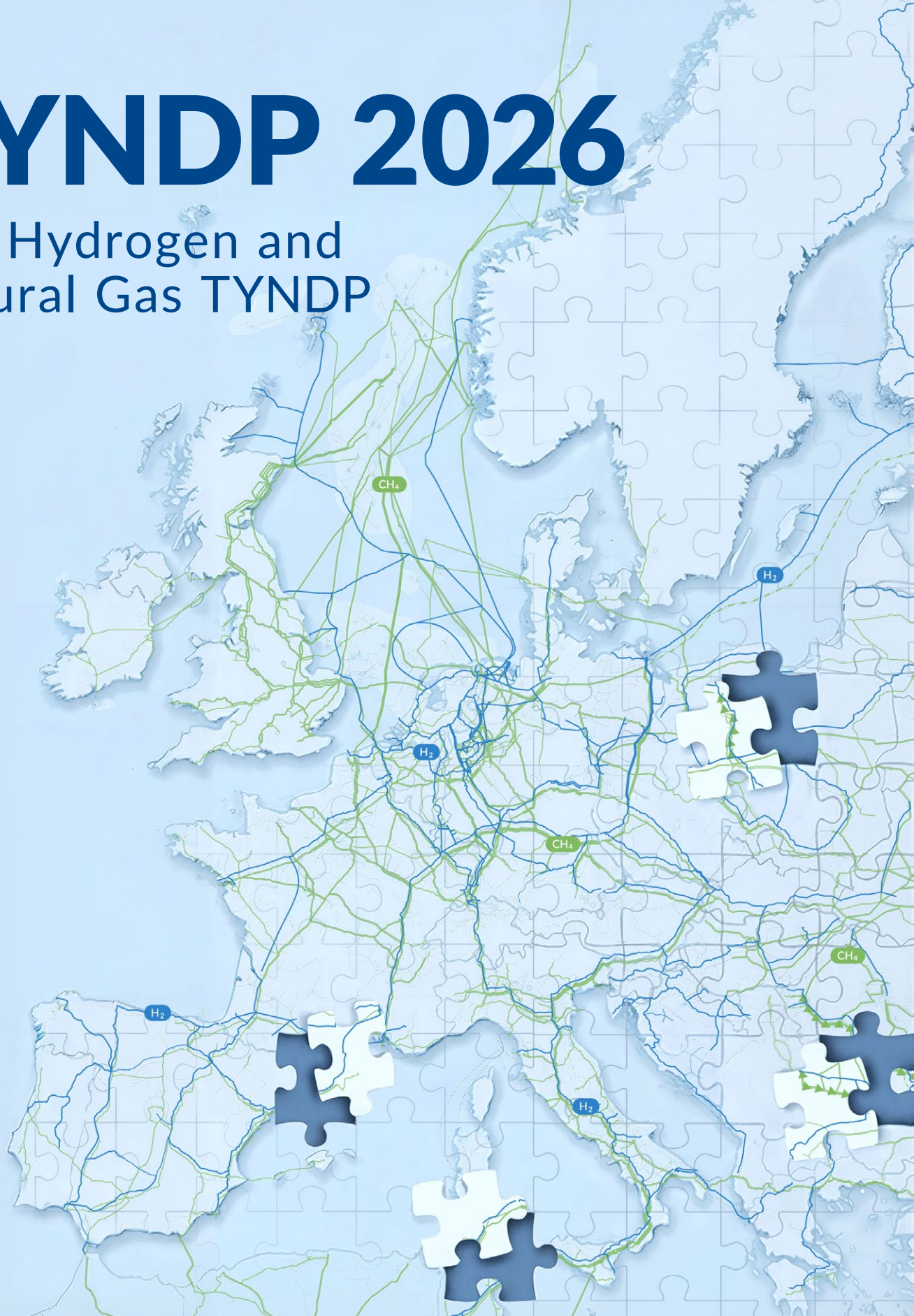


TYNDP 2026

The Hydrogen and Natural Gas TYNDP



Infrastructure Report
Draft



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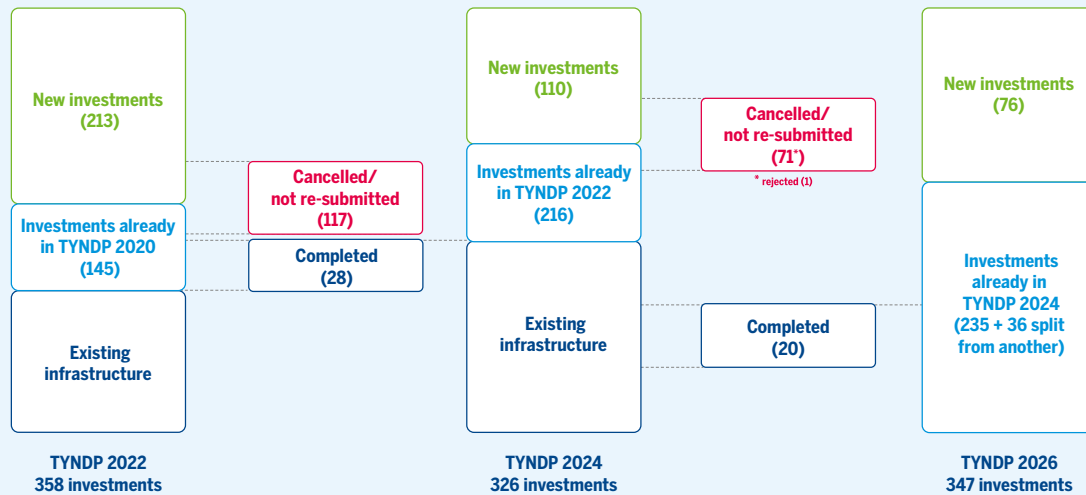
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PURPOSE OF THE REPORT

The ENTSG Infrastructure Report is a core component of the Ten-Year Network Development Plan (TYNDP) presenting key energy investment projects aimed at aligning the European energy system with the EU's climate and energy goals. The growing number of hydrogen projects are now classified under five specific subcategories.

Project submission and compliance:

The project submission process for the TYNDP 2026 was conducted from 29 September 2025 to 14 December 2025. Projects were submitted through the ENTSG Project Data Portal, following the [Guidelines for Project Inclusion](#).



Comparison between TYNDP 2022, TYNDP 2024 and TYNDP 2026.

KEY MESSAGES

- Decreasing number of new investments between each cycle i.e., 213 (2022), 110 (2024), 76 (2026).
- Most projects from previous TYNDPs are carried over to the next, proving long-term infrastructure planning consistency – this is the case for over two thirds of TYNDP 2026 projects
- During the TYNDP 2026 cycle, 36 new projects were submitted following the further splitting of existing investments into individual project sections, resulting in a more accurate and clearer representation of project maturity and characteristics.
- Completion rates remain low, with 36 projects completed by 2022, 28 by 2024 and 20 by 2025 suggesting lengthy development timelines or barriers.

MORE INFO (FULL REPORT & MAPS)

Full report & maps <https://www.entsog.eu/tyndp>
Projects [visualisation platform](#)

KEY NUMBERS

- 347** investments in total: 76 new investments, 235 carried over from TYNDP 2024 and 36 submitted as new projects, separated from TYNDP 2024 projects
- 65+** promoters participated (TSOs and third parties)
- 20** projects expected to be commissioned by 2026

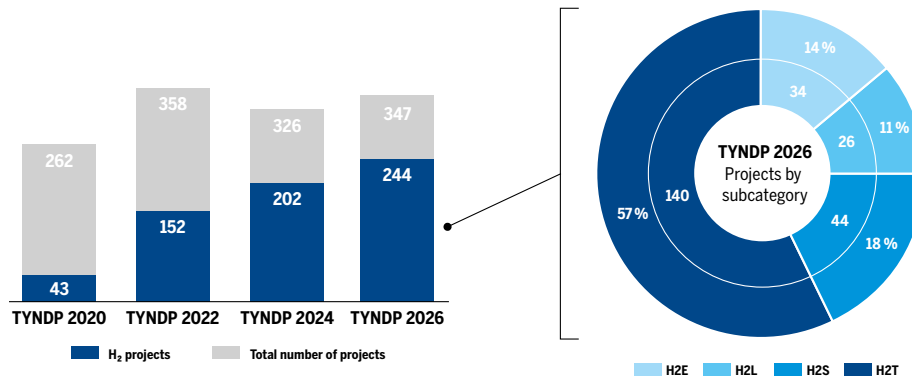
BREAKDOWN BY CATEGORY

- Hydrogen: **244** projects (~70 %)
- Natural Gas: **77** projects (~22 %)
- Smart Gas Grid & Other: **26** projects (~7 %)

HYDROGEN HIGHLIGHTS

- Subcategories: H2T (Transmission), H2S (Storage), H2L (Reception facilities), H2E (Electrolysers) and H2M¹ (Mobility)
- Maturity status: 14 FID, 69 Advanced, 161 Less-Advanced – 86 % of hydrogen projects expected by 2035

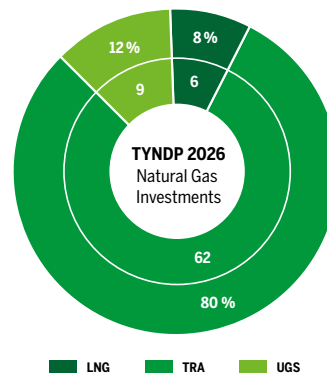
- 106 H₂ projects were included in the 2nd PCI/PMI Union list, higher compared to 71 in the 1st PCI/PMI list
- 38 % of hydrogen projects included in the NDPs (33 % in 2024); Germany leads with 32 hydrogen projects in NDPs
- CAPEX ~ €192 billion



Growing proportion of hydrogen projects compared to the total number of projects

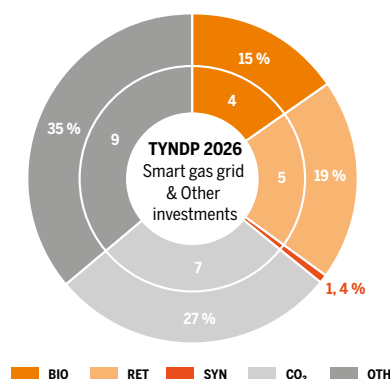
NATURAL GAS HIGHLIGHTS

- Maturity status: 26 FID, 18 Advanced and 33 Less-Advanced – 80 % of projects expected by 2030
- Italy and Romania lead in NDP inclusions
- CAPEX ~ € 33 billion
- PCI exceptions: EastMed Pipeline, Malta connection
- NG submissions have been progressively decreasing in recent TYNDP cycles, but are nevertheless, expected to enhance resilience and diversification of the European natural gas system and will continue playing an enabling role for the energy transition.



SMART GAS GRID & OTHER INVESTMENTS

- Includes Renewable Gas, Biomethane and CO₂ infrastructure
- CO₂ infrastructure (including CO₂ related projects submitted as OTH) represent the highest share of submissions.
- Maturity status: 2 FID, 4 Advanced and 20 Less-Advanced – Most projects expected by 2033
- CAPEX ~ €12 billion
- Slovakia leads with 4 projects



¹ No projects were submitted to the H2M subcategory

1 INTRODUCTION

The ENTSOG TYNDP is a comprehensive strategic plan which, together with the selection process of Projects of Common Interest (PCI) and Projects of Mutual Interest (PMI), coordinated by the European Commission (EC), aims to ensure the development of a reliable, integrated, and efficient infrastructure for the transport of energy molecules across Europe.

The Infrastructure Report, one of the main TYNDP documents, provides a detailed overview of the future network, starting from its current configuration.

ENERGY TRANSITION PROJECTS DRIVING THE FUTURE

TYNDP 2026 reflects ongoing decarbonisation efforts and the European path to decrease its fossil fuel dependence. It underlines that gas infrastructure must be developed in accordance with the EU energy and climate policy objectives, recognising that a resilient and sustainable network can only be achieved by integrating renewable and low-carbon gases.

In the 2020 TYNDP edition, ENTSOG introduced Energy Transition Projects (ETR) as a new infrastructure category. This category gained prominence in TYNDP 2022, expanding into Hydrogen, Biomethane, Retrofitted and Other infrastructure categories, while the shift to hydrogen and other energy transition projects was even more pronounced in the 2024 TYNDP edition. The same structure is followed in TYNDP 2026, ensuring consistency and continuity in the categorisation of energy transition infrastructure.

PROJECT SUBMISSION PROCESS AND PROJECT COMPLIANCE

For TYNDP 2026, the project submission process took place between 29 September 2025 and 14 December 2025. Project data was uploaded through an online portal, adapted to cover particular aspects of pure hydrogen, renewable gas, natural gas or other type of gas infrastructure.

In addition, as legally required by Annex III.2(5) of the [Regulation \(EU\) 2022/869](#) (the “TEN-E”-Regulation), projects submitted to the TYNDP 2026 must comply with specific administrative and technical criteria for inclusion in the TYNDP.

These are defined in [ENTSOG's TYNDP 2026 Guidelines for Project Inclusion](#) (GPI). ENTSOG consulted the GPI with the EC and ACER and took their inputs into consideration in the final version of this document.²

Projects submitted to TYNDP 2026 present different levels of maturity, as detailed in section 4. Their inclusion in the TYNDP does not make their development legally binding and should not be interpreted as an endorsement by ENTSOG or an EU body.

² A [consultation report on the TYNDP 2024 GPI](#) is publicly available, which served as the base for the TYNDP 2026 GPI.

2 EUROPEAN ENERGY POLICY ON HYDROGEN AND GAS INFRASTRUCTURE

The infrastructure included in ENTSOG's TYNDP 2026 results from the planning framework established by the legislative package³ on European internal markets of hydrogen and decarbonised gas, in force since August 2024. The package also amended the revised⁴ TEN-E Regulation, clarifying the respective roles of ENTSOG and ENNOH in future energy system planning.

More broadly, renewable and low-carbon fuels, including hydrogen, are one of the pillars of the [EU Strategy on Energy System Integration](#) (ESI), along with the “energy efficiency first” principle and direct electrification. Further, the Hydrogen Strategy, adopted together with the ESI Strategy, established a gradual trajectory to develop clean hydrogen for a climate-neutral European energy system by 2050.

Within an integrated energy system, renewable and low-carbon hydrogen, biogas and biomethane, are recognised solutions for hard-to-abate sectors. Additionally, they can act as storage of otherwise curtailed variable renewable electricity production. Ultimately, they act as key system integrators, bridging gas and electricity value chains and aligning energy supply with demand in sectors such as industry and transport.

The current EU-wide rules support the medium- and long-term development of a cross-border hydrogen network, including repurposed natural gas infrastructure for hydrogen. The [2nd Union list of PCIs and PMIs](#) under the TEN-E Regulation (the overall 7th PCI/PMI list) – was adopted by the EC in April 2026.

Given that new natural gas infrastructure is no longer eligible, the framework clearly prioritises hydrogen development. The number of hydrogen-related projects increased to 100 out of a total of 235⁵, confirming the commitment to building the European a hydrogen backbone.

The current rules are designed from a cross-sectoral and technology-neutral perspective and build on previous developments, such as the “Fit for 55” package, that set policy to reach the EU's climate goals, the REPowerEU Plan, that aimed for accelerated hydrogen deployment in an increasingly electrified system, the European Climate Law and the Green Deal, which provide general support for the integration of renewables and clean energy technologies.

Since December 2025, the legal set-up for network planning is undergoing a new revision, based on the EC's proposed “[Grids Package](#)”, meant to address a series of perceived limitations to the development of the European energy networks.

3 It consists of a [Reg. EU 2024/1789](#) and of Directive (EU) 2024/1788. The regulation defines the framework for the future gas and hydrogen infrastructure to integrate a higher share of hydrogen and renewable gases, while the directive aims at creating a certification framework and set the direction for agreement on a definition for low-carbon hydrogen.

4 [June 2022](#)

5 Compared to 65 out of a total 166, in the 2nd Union list of PCIs and PMIs

3 TYNDP 2026 PROJECT DATA COLLECTION PROCESS

In order to ensure the quality of the project collection and project assessment, ENTSOG, as in every TYNDP cycle, has made a substantial effort to improve the process by adjusting and upgrading its Project Data Portal and by focusing on better communication with, as well as clearer instructions for promoters, in efforts to improve quality and consistency of the collected project data.

For each TYNDP, ENTSOG gathers information on existing firm capacities directly from TSOs for transmission infrastructures and from Gas Infrastructure Europe (GIE) for LNG regasification terminals and storage facilities. For the TYNDP 2026, data on existing firm capacities were collected as of **1 January 2026**.

To offer a comprehensive view of the European gas system over the next years, it is crucial to include all relevant infrastructure projects in the TYNDP. ENTSOG has conducted an open and transparent data collection process, actively encouraging project promoters to submit their projects. Recognising the submission of detailed project data as essential for infrastructure analysis, ENTSOG has provided a Project Data Portal accessible to all project promoters to facilitate this process.

Only projects that have been actively (re-)submitted by promoters through the Project Data Portal are included in the TYNDP 2026. This ensures transparency and non-discrimination between projects.

Before the submission phase, ENTSOG offered support to project promoters by providing a documentation kit with a [handbook](#) on using the Project Data Portal and organised dedicated [webinars](#).

To enhance transparency and accuracy of information and facilitate coordination among promoters, the ENTSOG Project Data Portal provides capacity monitoring interfaces. This allows project promoters to monitor their submissions actively through specific reports and check the final capacity value resulting from the application of the “lesser-of-rule”⁶.

By submitting projects, promoters commit to providing accurate and up-to-date information. In specific cases, ENTSOG has taken corrective actions in accordance with pre-defined rules. Each project is assigned a unique TYNDP code by the Project Data Portal upon first submission. This code remains consistent across future TYNDP updates in most cases⁷, allowing the project’s progress to be tracked across different editions and during the PCI and PMI selection process. Promoters were also required to provide detailed implementation schedules and estimated costs.

As presented in **Figure 1**, for TYNDP 2026 the initial project submission phase occurred from 29 September 2025 to 26 October 2025. This was followed by a verification and correction phase from 27 October 2025 to 14 December 2025, allowing both ENTSOG and promoters to review and amend the submitted data. This information was also shared with the EC.

6 The “lesser-of-rule” means that, on a Point with Entry and Exit capacities, the minimum of the two values will be considered as the firm capacity available for use. Example: Promoter A submits an Exit capacity on Point P in the value of 100. Promoter B submits an Entry capacity on the other side of the Point P, in the value of 200. After the application of the rule, the firm capacity considered for modelling will be 100.

7 Some H2T projects submitted in TYNDP 2024 consisted of multiple sections. To better reflect the characteristics and maturity of each section, project promoters split these projects into separate sections, each assigned a different project code.



Picture courtesy of terranets bw

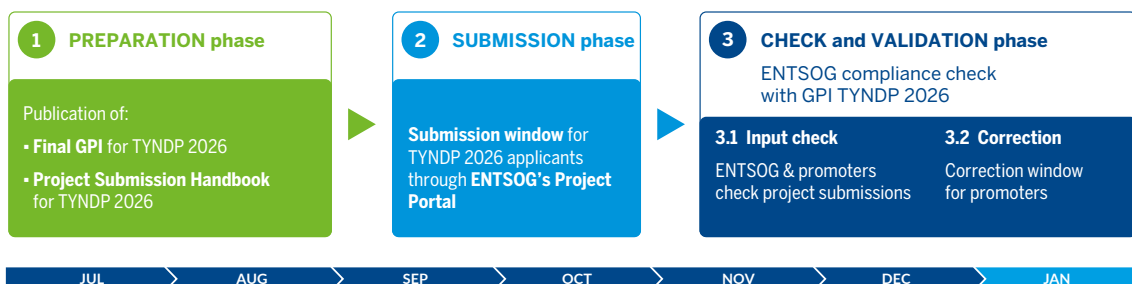


Figure 1: Phases and timeline of the TYND 2026 project collection.

Within 3 months after the close of the check and validation phases, ENTSOG published on its website the list of projects accepted for inclusion in the TYNDP. In advance of the TYNDP 2026 project list's publication, ENTSOG informed the relevant promoters about any non-inclusion of their project(s) in the TYNDP 2026 and provided the relevant justification for the non-inclusion.

It should be noted that no promoter appealed against any decision for project non-inclusion. The promoter of the Blue Danube project, that initially did not fulfil the technical criteria, contested the ENTSOG decision to reject the project from TYNDP and provided the additional material in order to comply with technical criteria described in the GPI.



4 PROJECT MATURITY STATUS AND INFRASTRUCTURE LEVELS

4.1 PROJECT MATURITY STATUS

4.1.1 HYDROGEN INFRASTRUCTURE PROJECTS

Depending on their level of maturity, **hydrogen projects** are categorised along different statuses. In TYNDP 2026 there are three different project maturity statuses: FID⁸, Advanced and Less-Advanced.

Each project maturity status is directly derived from the information provided by its promoter and according to the rules set in the ENTSOG GPI document:

The **FID status** is applied to projects that, based on the information submitted,

- ▲ have taken the final investment decision ahead of the closure of TYNDP 2026 project collection.
- ▲ Projects with FID status are identified in TYNDP project code with an **F** (e.g., H2T-**F**-000).

- ▲ The **Advanced status** is applied to projects that, based on the information submitted, have:
- ▲ commissioning expected at the latest by 31 December of the year of the TYNDP project data collection +6 (e.g., 2031 in case of TYNDP 2026, for which projects are collected in 2025)
- ▲ AND the project fulfils at least one of the following criteria:
 - Project is included in the national development plan(s) (NDP) or in the national law of the respective country(ies)
 - Project has successfully consulted the market through a market test (including non-binding processes), which delivered positive results

8 FID: Final Investment Decision



Hydrogen projects with Advanced status are identified by TYNDP project code with an **A** (e.g., H2T-**A**-000).

- ▲ All hydrogen projects which do not meet the criteria of having FID or Advanced status are considered as having the **Less-Advanced status**⁹.
- ▲ Projects with Less-Advanced status are identified in TYNDP project code with an **N** (e.g., H2T-**N**-000).

4.1.2 NATURAL GAS AND OTHER INFRASTRUCTURE PROJECTS

Similarly, in TYNDP 2026 natural gas or other projects were categorised following their maturity status. The **FID status** has the same definition as for hydrogen projects, while **the Advanced status** for natural gas infrastructure is restricted to projects that, based on the information submitted, have:

- ▲ commissioning expected at the latest by 31 December 2031
- ▲ AND the project fulfils at least one of the following criteria:
 - Permitting phase has started ahead of the TYNDP 2026 project data collection
 - Front-End Engineering Design (FEED) has been completed ahead of the TYNDP project data collection

All natural gas projects which do not meet the criteria of having FID or Advanced status are considered as having the **Less-Advanced status**.

Additionally, the **PCI/PMI** status is assigned to a project which is part of the Union list of PCIs and PMIs as detailed in section B of the Annex VII to the TEN-E Regulation, irrespective of the above-mentioned project maturity status. According to the TEN-E regulation, natural gas projects are not eligible for the PCI/PMI label, however, there are few exceptions (see Section 7.4).

⁹ Less advanced projects are considered as important input for the TYNDP assessments. One reason is that Annex III.2(1)(d) of the TEN-E Regulation in principle allows projects to become a PCI or PMI. Due to Annex III.2(4) of the TEN-E Regulation, being part of the latest ENTSG TYNDP is thereby a requirement to become a PCI or PMI for hydrogen projects falling under the categories listed in Annex II(3) of the TEN-E Regulation. In order not to unduly restrict such less mature projects from receiving a PCI or PMI status, they must also be collected for the TYNDP.

4.2 INFRASTRUCTURE LEVELS

Infrastructure levels are defined as the potential level of development of the European hydrogen network, electricity network, or natural gas network.

An infrastructure level represents the complete set of infrastructure elements assumed to be in place along the considered analysis time horizon.

4.2.1 HYDROGEN INFRASTRUCTURE LEVELS

There are two hydrogen infrastructure levels (see Figure 2):

- A **PCI/PMI hydrogen infrastructure level** containing existing hydrogen infrastructure, FID hydrogen projects, and hydrogen projects on the 2nd PCI/PMI list.
- An **Advanced hydrogen infrastructure level** containing the existing hydrogen infrastructure, FID hydrogen projects, PCI/PMI hydrogen infrastructure level as well as advanced hydrogen projects.
- The Advanced hydrogen infrastructure level broadens the range of the TYNDP 2026 System assessment, by including the advanced hydrogen projects on top of PCI/PMI infrastructure, allowing for a better and more complete infrastructure gaps identification.

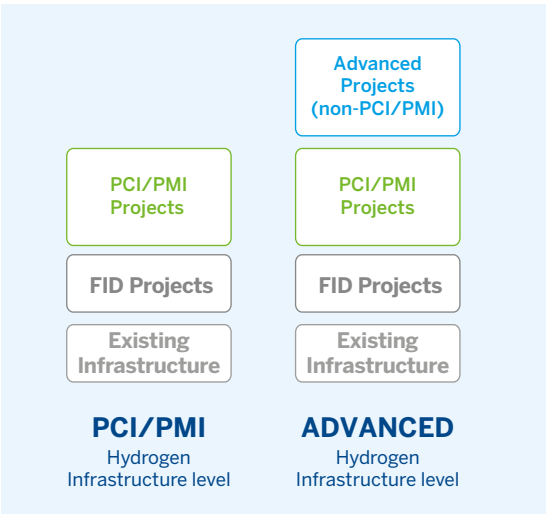


Figure 2: Hydrogen infrastructure levels in TYNDP 2026.

4.2.2 NATURAL GAS INFRASTRUCTURE LEVELS

There are two natural gas infrastructure levels (see Figure 3):

- ▲ A **Low natural gas infrastructure level** containing existing natural gas infrastructure and FID natural gas projects.
- ▲ An **Advanced natural gas infrastructure level** containing the existing natural gas infrastructure, FID natural gas projects, as well as advanced natural gas projects.

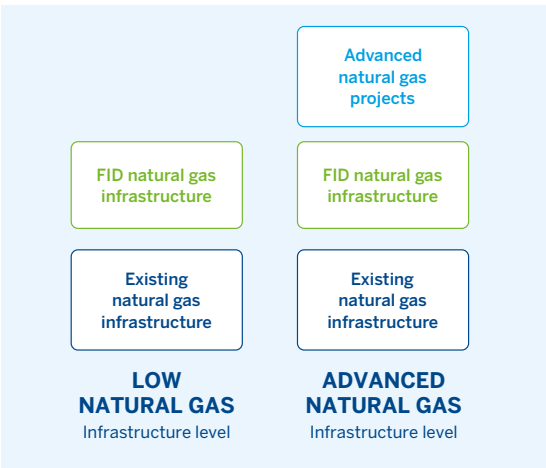


Figure 3: Natural gas infrastructure levels in TYNDP 2026.

5 OVERVIEW OF PROJECT SUBMISSION

Overall, 347 investments¹⁰ have been included in the TYNDP 2026 by more than 65 different project promoters including both TSOs and third-party promoters. The graph below provides the overview for this submission, compared to the previous TYNDP editions. The full details of the project information included in the TYNDP 2026 can be found in Annex A of this report. This section of the report provides a general view of the received submissions. Submissions are further analysed in sections 6, 7 and 8.

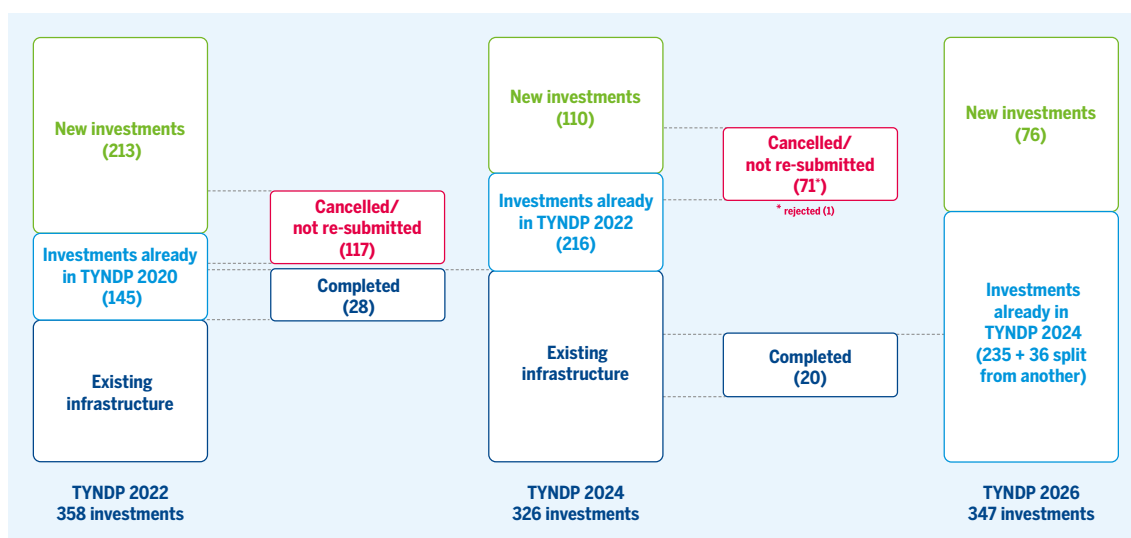


Figure 4: Comparison between TYNDP 2022, TYNDP 2024 and TYNDP 2026.

As shown in **Figure 4**, of the 326 investments included in TYNDP 2024, 71 were either cancelled, not resubmitted, or rejected, while 20 were completed. The remaining 235 investments were resubmitted to TYNDP 2026.

Due to the further splitting of some of these investments, these 235 investments correspond to 271 projects in TYNDP 2026, representing an increase of 36 projects.

In **Table 1** below, the detailed evolution of projects between TYNDP 2024 and TYNDP 2026 is presented.

Status	Completed in TYNDP 2026	FID in TYNDP 2026	Advanced in TYNDP 2026	Less Advanced in TYNDP 2026	Cancelled/Not resubmitted to TYNDP 2026	Total
FID (TYNDP 2024)	18	12	2	0	4	36
Advanced (TYNDP 2024)	1	16	40	41	19	117
Less-Advanced (TYNDP 2024)	1	6	21	98	47	173
Total	20	34	63	139	70	326

Table 1: Evolution of projects from TYNDP 2024 to TYNDP 2026 (all Categories).

¹⁰ The terms investment and project are used interchangeably in this report.



5.1 INFRASTRUCTURE CATEGORIES

The TYNDP 2026 is designed to offer a view of the future hydrogen and natural gas infrastructure evolution. One aim of the TYNDP 2026 is to include projects that bring benefits to the European society beyond an exclusive eligibility assessment of projects for the status of PCI or PMI. For this reason, promoters can submit to the TYNDP, on a voluntary basis, also production facilities (such

as electrolyzers), as well as natural gas projects needed to complete market integration or to ensure security of supply and reduce dependence on extra-EU supplies.

As defined in TYNDP 2026 GPI, projects are classified into four different categories based on the energy carrier. In addition, each main category is divided into different subcategories, as it follows:

1 // HYDROGEN

- ▲ Hydrogen transmission pipelines (**H2T**)
- ▲ Hydrogen storage facilities (**H2S**)
- ▲ Hydrogen reception facilities (**H2L**)
- ▲ Hydrogen in the transport sector for mobility (**H2M**)
- ▲ Electrolysers for hydrogen production (**H2E**)

2 // NATURAL GAS

- ▲ Gas transmission pipelines (**TRA**)
- ▲ Underground storage facilities (**UGS**)
- ▲ Reception and storage and regasification or decompression facilities for liquefied natural gas (**LNG**)

3 // SMART GAS GRID

- ▲ Retrofitting projects to integrate hydrogen blends (**RET**)
- ▲ Biomethane development projects (**BIO**)
- ▲ Synthetic methane projects (**SYN**)

4 // OTHERS

- ▲ Repurposing of natural gas infrastructure for CO₂ transport and/or storage (**CO₂**)
- ▲ Other infrastructure related projects (**OTH**)

Project subcategories allow for an adapted and fit-for-purpose project submission process. **Figure 5** provides an overview of the submitted investments per type of infrastructure.

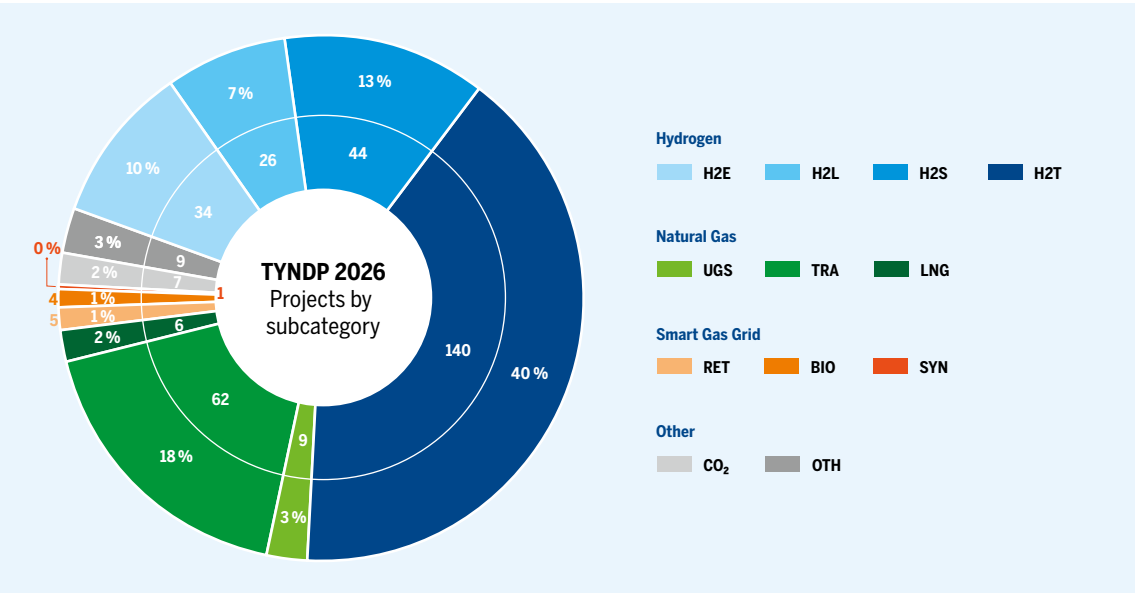


Figure 5: Project inclusion in TYNDP 2026 by subcategory.

Among the 347 projects included in TYNDP 2026, 76 were submitted for the first time. **Figure 6** presents a breakdown of the number of new projects included in TYNDP 2026.

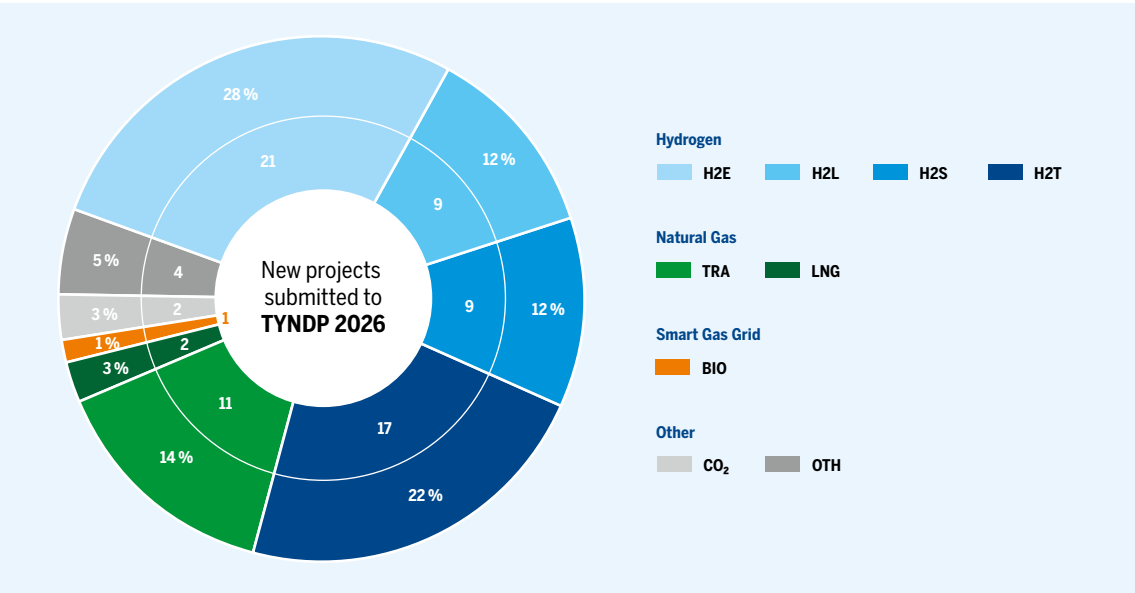


Figure 6: Number of new projects per subcategory in TYNDP 2026

5.2 PROJECTS COMMISSIONED SINCE TYNDP 2024

The following map shows all projects completed since the last TYNDP edition.

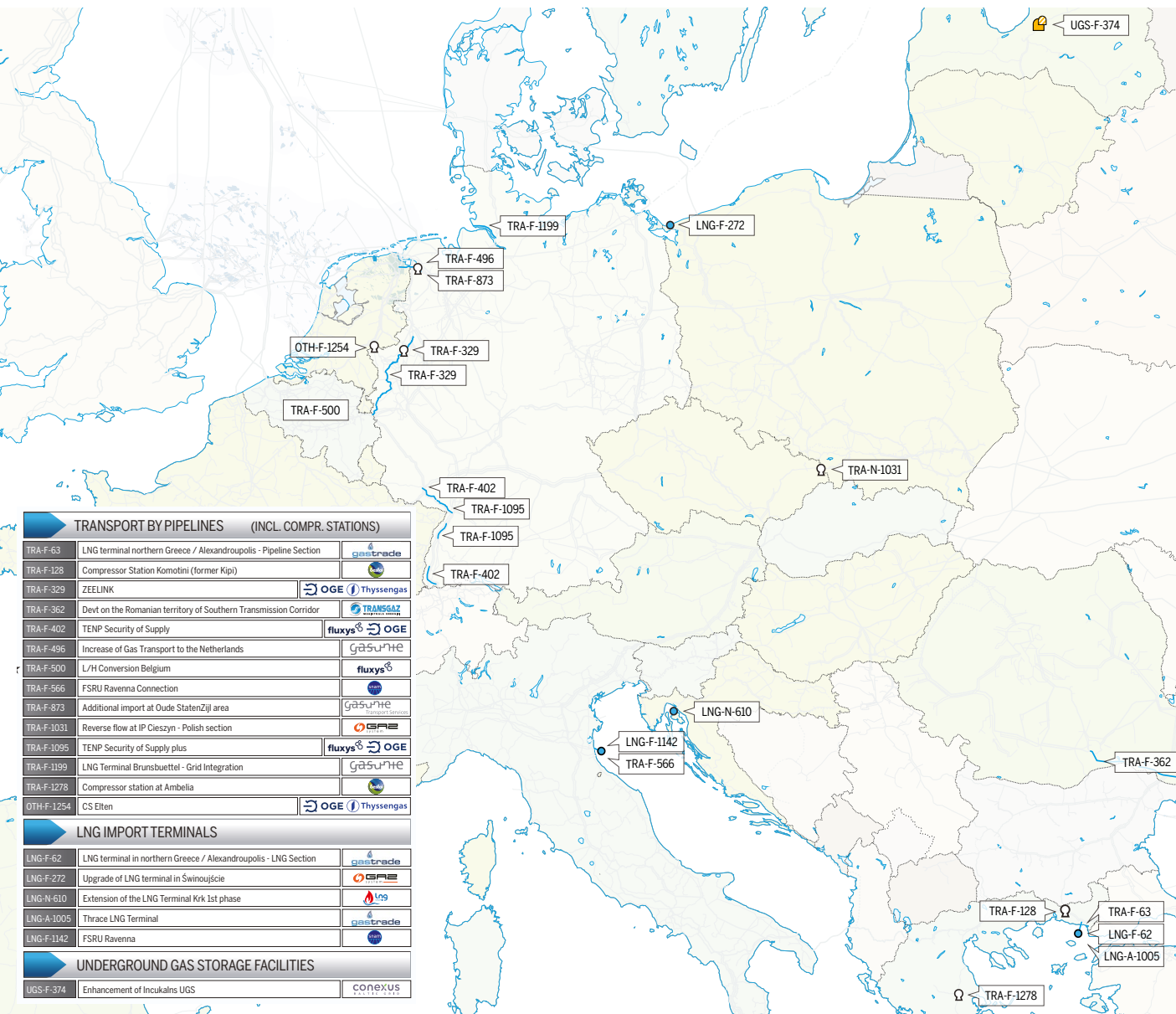


Figure 7: Map of projects commissioned since 2024

20 projects that were part of TYNDP 2024 were completed between the two TYNDP editions. The commissioning of these projects further contributes to the development of the European gas system, enhancing the level of sustainability, market integration, security of supply, and competition.

The commissioned natural gas projects are primarily driven by the need to strengthen security of supply across Europe in the context of declining domestic production and shifting geopolitics, particularly following reduced reliance on Russian gas and the phase-out of low-calorific gas.

They support diversification of supply routes and sources – through LNG, the Southern Corridor, or new entry points while enhancing cross-border interconnections, regional integration, and market competition. Several projects address growing or evolving demand, remove bottlenecks, and expand transmission capacity, including enabling reverse flows and increased exports. At the same time, they facilitate system transformation by accommodating the switch from L-gas to H-gas, ongoing coal-to-gas switch in some European countries, improving resilience, and ensuring infrastructure readiness for future decarbonisation pathways, including hydrogen integration.

5.3 PROJECTS FORESEEN TO BE COMMISSIONED BEFORE THE END OF 2026

In addition to the 20 commissioned projects, 16 investments which are about to be commissioned before the end of 2026 have been submitted to TYNDP 2026. These projects are primarily driven by the need to enhance security of supply and adapt to shifting gas flow patterns following the geopolitical crisis, while improving regional integration and cross-border interconnections. They aim to increase capacity, remove bottlenecks, and enable reverse flows, supporting diversification of supply sources—particularly through LNG imports (e.g. via Krk and Southern corridors). At the same time, they respond to growing and evolving demand in certain regions, support market integration and competition, and ensure system flexibility.

Several projects also facilitate the energy transition by enabling the integration of biomethane, hydrogen-ready infrastructure, implementation of the coal-to-gas switch, and the use of alternative gases, alongside improvements in efficiency and environmental performance.

Among the 16 investments, there is one hydrogen project – RWE H2 Storage Gronau-Epe (H2S-F-1284). The commissioning of the first H2S project will support further the development of a European hydrogen market. Positioned along the HI West corridor, it will enable reliable hydrogen supply by balancing fluctuating renewable-based production, ensuring system flexibility, and safeguarding against supply and demand disruptions.

The map of the soon to be commissioned projects is presented below:

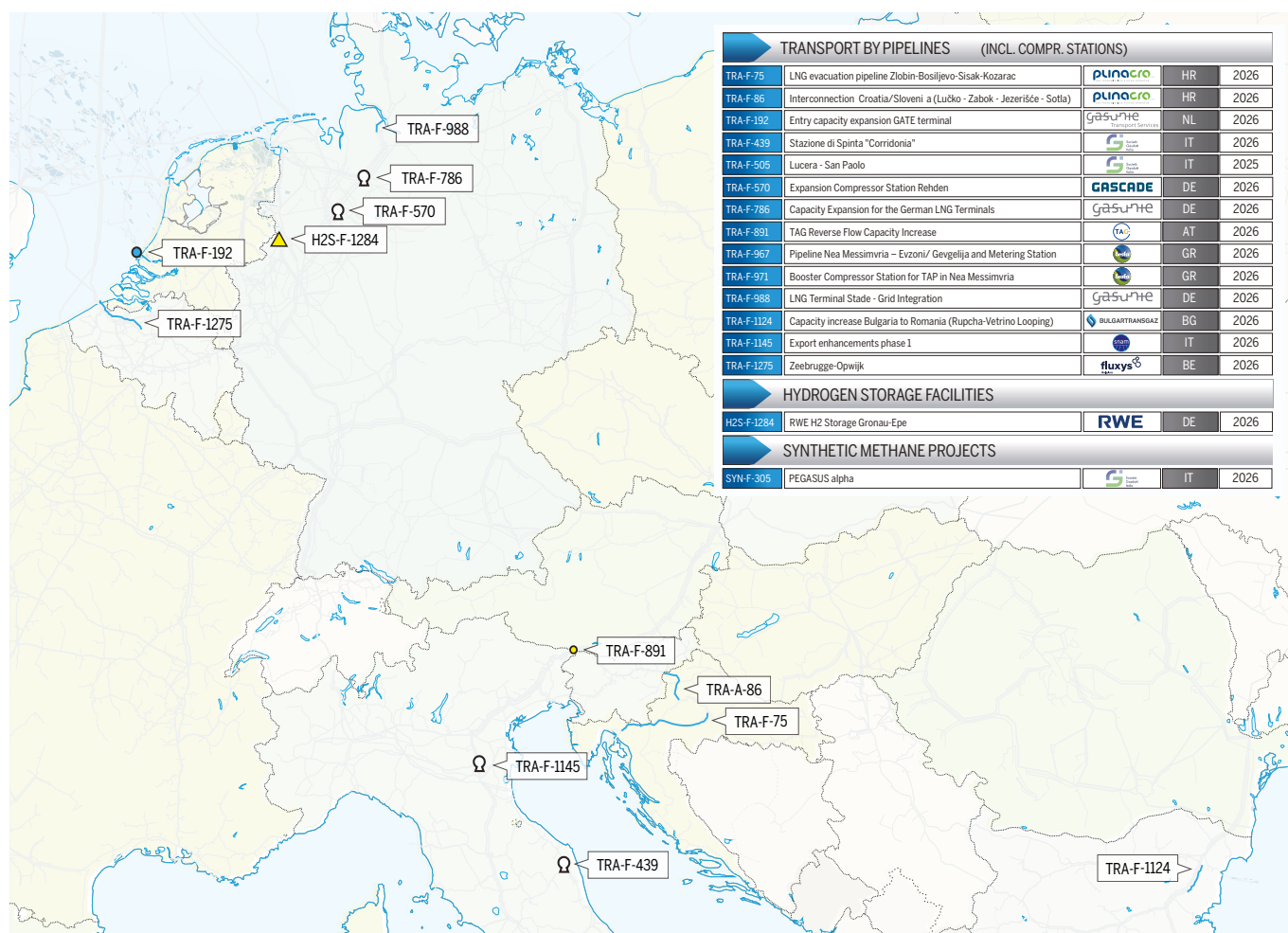


Figure 8: Projects foreseen to be commissioned before the end of 2026



6 PROMOTERS' SUBMISSIONS FOR HYDROGEN INFRASTRUCTURE/ PROJECTS TO TYNDP 2026

The full details of all project information included in the TYNDP 2026 can be found in Annex A. This section provides a general overview of the received submissions specifically under the hydrogen subcategories (as defined in Section 5.1).

Introduced in TYNDP 2024, ENTSG followed the same structure for the submission of hydrogen projects in TYNDP 2026, with five hydrogen subcategories: H2T, H2L, H2S, H2E and H2M.

244 hydrogen submissions in total have been included in the TYNDP 2026 falling under the hydrogen subcategories mentioned above. Notably, no projects were received under the H2M subcategory, whereas one H2M project had been submitted in TYNDP 2024 but was not resubmitted.

6.1 H2T – HYDROGEN TRANSMISSION PIPELINE PROJECTS

For TYNDP 2026, promoters submitted 140 hydrogen transmission projects. Among the 140 projects, 89 (64 %) include only new infrastructure, 40 (28 %) include a mix of new and repurposed infrastructure and 11 (8 %) include only repurposed (see [Figure 9](#)).

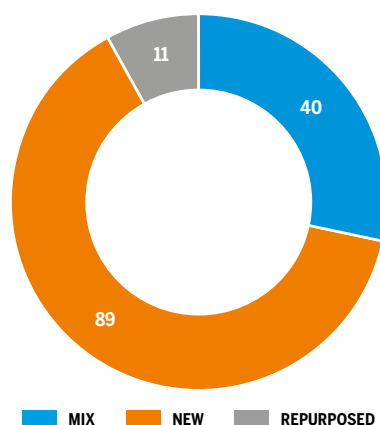


Figure 9: H2T infrastructure projects submitted to TYNDP 2026.

6.2 H2S – HYDROGEN STORAGE FACILITIES PROJECTS AND H2L – HYDROGEN RECEPTION FACILITIES

For TYNDP 2026, promoters submitted 44 hydrogen storage projects to enable the storage of pure hydrogen. 31 projects are new infrastructure, two are a mix of new and repurposed infrastructure and 11 are repurposed (see [Figure 10](#)).

Furthermore, promoters submitted 26 projects under the hydrogen reception facilities category. 24 of them are new and two are repurposed (see [Figure 11](#)). For 20 out of 26 H2L projects, the importing hydrogen carrier will be ammonia, whereas for five liquified hydrogen and for one project, LOHC.

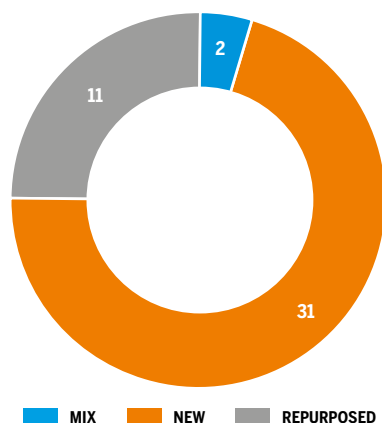


Figure 10: H2S infrastructure projects submitted to TYNDP 2026.

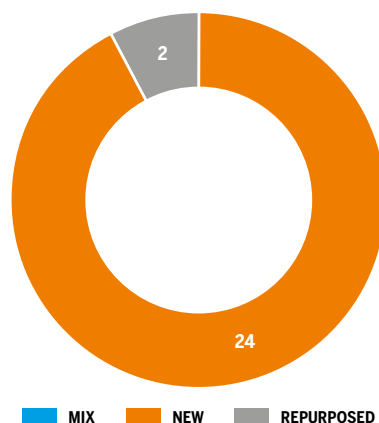


Figure 11: H2L infrastructure projects submitted to TYNDP 2026.

6.3 H2E – ELECTROLYSERS FOR HYDROGEN PRODUCTION

For TYNDP 2026, promoters submitted 34 H2E projects – an increase from the 29 proposals received for TYNDP 2024.

MAP FOR HYDROGEN INFRASTRUCTURE IN TYNDP 2026

HYDROGEN TRANSMISSION PIPELINES (H2T)				
H2T-F-899	MosaHYC - Mosel Saar Hydrogen Conversion		FID	PCI
H2T-F-725	Belgian Hydrogen Backbone - Interconnect. BE-NL (Zandvliet & Zelzate)		FID	Non-PCI
H2T-F-1366	Dutch Hydrogen Network - Delta Rhine Corridor (DRC)		FID	Non-PCI
H2T-A-443	Nordic-Baltic Hydrogen Corridor - FI section		Advanced	PCI
H2T-A-444	HySOW Atlantic to Mediterranean		Advanced	PCI
H2T-A-442	HyPipe Bavaria - The Hydrogen Hub		Advanced	PCI
H2T-A-467	MIDHY		Advanced	PCI
H2T-A-693	Dutch Hydrogen Network - North East		Advanced	PCI
H2T-A-694	Dutch Hydrogen Network - South West		Advanced	PCI
H2T-A-735	North Africa Hydrogen Corridor (offshore part)		Advanced	PCI
H2T-A-708	Belgian Hydrogen Backbone - Interconnection BE-DE		Advanced	PCI
H2T-A-757	H2 Backbone WAG - Penta West		Advanced	PCI
H2T-A-779	Pomeranian Hydrogen Cluster		Advanced	PCI
H2T-A-788	H2 transmission system in Bulgaria		Advanced	PCI
H2T-A-906	Vlaughuis - Ochtrup		Advanced	PCI
H2T-A-909	Connection HY-FEM-Geoh2		Advanced	PCI
H2T-A-969	RHYn		Advanced	PCI
H2T-A-978	Portuguese Hydrogen Backbone		Advanced	PCI
H2T-A-986	H2 Readiness of the TAG pipeline system		Advanced	PCI
H2T-A-987	MosaHYC (Mosel Saar Hydrogen Conversion) - Germany		Advanced	PCI
H2T-A-1001	Hyperlink 3 Danish-German Hydrogen Network - German part		Advanced	PCI
H2T-A-1034	Czech H2 Backbone WEST (formerly COHL Czech part)		Advanced	PCI
H2T-A-1035	Franco-Belgian H2 corridor (incl. WHRYN)		Advanced	PCI
H2T-A-1037	Hercules Network North		Advanced	PCI
H2T-A-1038	Hercules Network West		Advanced	PCI
H2T-A-1052	Hercules Network South-West		Advanced	PCI
H2T-A-1058	Hercules Network South-East		Advanced	PCI
H2T-A-1075	Hercules Network North-West		Advanced	PCI
H2T-A-1096	RHYn Interco (Section 1-3)		Advanced	PCI
H2T-A-1136	Nordic Hydrogen Route - Bothnian Bay - Finnish section - Pipeline		Advanced	PCI
H2T-A-1144	Nordic-Baltic Hydrogen Corridor - PL section		Advanced	PCI
H2T-A-1147	Spanish hydrogen backbone 2030		Advanced	PCI
H2T-A-1156	H2Med/CatZa		Advanced	PCI
H2T-A-1171	Nordic Hydrogen Route- Bothnian Bay- Swedish part		Advanced	PCI
H2T-A-1205	Italian H2 Backbone		Advanced	PCI
H2T-A-1234	Danish Backbone West		Advanced	PCI
H2T-A-1280	Nordic-Baltic Hydrogen Corridor - LV section		Advanced	PCI
H2T-A-1310	Nordic-Baltic Hydrogen Corridor - DE section		Advanced	PCI
H2T-A-1315	H2 interconnection DE-PL		Advanced	PCI
H2T-A-1355	Baltic Sea Hydrogen Collector - Offshore Pipeline (BHC)		Advanced	PCI
H2T-A-1365	Dutch Hydrogen Network - North West		Advanced	PCI
H2T-A-1399	Belgian Hydrogen Backbone - Tie-in Antwerp NH3 Terminals		Advanced	PCI
H2T-A-9	OGE Hercules Central		Advanced	Non-PCI
H2T-A-46	Interconn. Croatia-Bosnia-Herzegov. (Slobodnica-Bosanski Brod)		Advanced	Non-PCI
H2T-A-68	H2 Ionian Adriatic Pipeline		Advanced	Non-PCI
H2T-A-70	Interconnection Croatia/Serbia (Slobodnica-Setin-Backa Novo Selo)		Advanced	Non-PCI
H2T-A-224	Northern Interconnection BH/CRO		Advanced	Non-PCI
H2T-A-302	Interconnection Croatia-Bosnia and Herzegovina (South)		Advanced	Non-PCI
H2T-A-303	Interconnection Croatia-Bosnia and Herzegovina (West)		Advanced	Non-PCI
H2T-A-418	Connection Flume Treste Livello F		Advanced	Non-PCI
H2T-A-542	HyBRIDS		Advanced	Non-PCI
H2T-A-555	Apulia H2 Backbone		Advanced	Non-PCI
H2T-A-633	GETH2-IPCEI		Advanced	Non-PCI
H2T-A-666	H2Coastlink		Advanced	Non-PCI
H2T-A-696	Spanish Hydrogen Backbone: Coruña-Zamora		Advanced	Non-PCI
H2T-A-699	Spanish Hydrogen Backbone: Castilla y León		Advanced	Non-PCI
H2T-A-735	North Africa Hydrogen Corridor (onshore part)		Advanced	Non-PCI
H2T-A-925	SK-HU H2 corridor		Advanced	Non-PCI
H2T-A-849	FLOW - making hydrogen happen (West)		Advanced	Non-PCI
H2T-A-851	Southern Interconnection BH/CRO		Advanced	Non-PCI
H2T-A-848	SLOH2 Backbone - AT-SI H2 Interconnection		Advanced	Non-PCI
H2T-A-876	IP Elten/Zevenaar - Cologne		Advanced	Non-PCI
H2T-A-910	Western Interconnection BH/CRO		Advanced	Non-PCI
H2T-A-917	Embsüren - Leverkusen		Advanced	Non-PCI
H2T-A-933	Hyperlink 4-5 Wilhelmshaven - Embsüren		Advanced	Non-PCI
H2T-A-1000	Hyperlink 1-2		Advanced	Non-PCI
H2T-A-1014	Giurgiu Nădlac hydrogen corridor with new H2 interconnector		Advanced	Non-PCI
H2T-A-1015	New Hydrogen pipeline from Black Sea area to Podgor		Advanced	Non-PCI
H2T-A-1065	HU hydrogen corridor I HU/UA		Advanced	Non-PCI
H2T-A-1090	Connection of DESFA's transmission system with East Med pipeline		Advanced	Non-PCI
H2T-A-1096	RHYn Interco (Sections 4-5)		Advanced	Non-PCI
H2T-A-1178	HYROW (Rostock - Wrangelsburg)		Advanced	Non-PCI
H2T-A-1206	HU hydrogen corridor IV HU/SK		Advanced	Non-PCI
H2T-A-1220	Spanish Hydrogen Backbone: Huelva-Cádiz		Advanced	Non-PCI
H2T-A-1259	HU hydrogen corridor V HU/RO		Advanced	Non-PCI
H2T-A-1291	Hyntamed 1		Advanced	Non-PCI
H2T-A-1368	Spanish Hydrogen Backbone: Castilla - La Mancha & Conn. Madrid		Advanced	Non-PCI

H2T-N-705	Kamina-Florovouni H2 Pipeline		Less-Adv.	PCI
H2T-N-709	Belgian Hydrogen Backbone - Interconnection BE-UK		Less-Adv.	PCI
H2T-N-710	Belgian Hydrogen Backbone - Interconnection BE-FR (Blaregnies)		Less-Adv.	PCI
H2T-N-711	Belgian Hydrogen Backbone - Interconnection BE-FR (Alveringem)		Less-Adv.	PCI
H2T-N-726	Belgian Hydrogen Backbone - Interconn. BE-NL (Gravenvoeren)		Less-Adv.	PCI
H2T-N-738	Delta Rhine Corridor H2		Less-Adv.	PCI
H2T-N-740	Alpine HyWay		Less-Adv.	PCI
H2T-N-796	FLOW - making hydrogen happen (East)		Less-Adv.	PCI
H2T-N-990	Dedicated H2 Pipeline		Less-Adv.	PCI
H2T-N-991	AquaDuctus		Less-Adv.	PCI
H2T-N-1023	Italian H2 Backbone (Poggio Renatico - P. Gries)		Less-Adv.	PCI
H2T-N-1122	Nordic-Baltic Hydrogen Corridor - EE section		Less-Adv.	PCI
H2T-N-1137	Central European Hydrogen Corridor (CEHC) (UKR part)		Less-Adv.	PCI
H2T-N-1151	H2Med-BarMar		Less-Adv.	PCI
H2T-N-1239	Nordic-Baltic Hydrogen Corridor - LT section		Less-Adv.	PCI
H2T-N-1251	Czech H2 Backbone NORTH		Less-Adv.	PCI
H2T-N-1264	Slovak Hydrogen Backbone		Less-Adv.	PCI
H2T-N-1286	Alpine H2 Corridor		Less-Adv.	PCI
H2T-N-1294	HYALink		Less-Adv.	PCI
H2T-N-1324	H2Med-CatZa (Enagás)		Less-Adv.	PCI
H2T-N-1372	Belgian Hydrogen Backbone - Interconnection BE-LUX		Less-Adv.	PCI
H2T-N-1373	Belgian Hydrogen Backbone - Zebruggen Import		Less-Adv.	PCI
H2T-N-441	Joint North Sea Energy Hub - Hydrogen pipeline		Less-Adv.	Non-PCI
H2T-N-572	Project Union and the UK Hydrogen Backbone		Less-Adv.	Non-PCI
H2T-N-597	HyPipe Bavaria - Connect		Less-Adv.	Non-PCI
H2T-N-619	H2 interconnection Croatia/Slovenia (Luko-Zabok-Rogatec)		Less-Adv.	Non-PCI
H2T-N-625	Onești-Ungheeni corridor modernization for hydrogen transmission		Less-Adv.	Non-PCI
H2T-N-644	Branch to Nordic-Baltic Hydrogen Corridor - LT section		Less-Adv.	Non-PCI
H2T-N-648	Romania - Serbia Interconn. modernization for H2 transmission		Less-Adv.	Non-PCI
H2T-N-675	North Sea Hydrogen Backbone Link Project		Less-Adv.	Non-PCI
H2T-N-686	SLOH2 Backbone - HR-SI H2 Interconnection		Less-Adv.	Non-PCI
H2T-N-689	SLOH2 Backbone - HU-SI H2 Interconnection		Less-Adv.	Non-PCI
H2T-N-707	West Macedonia H2 Pipeline		Less-Adv.	Non-PCI
H2T-N-722	UK-GER Hydrogen Interconnector		Less-Adv.	Non-PCI
H2T-N-730	Corol - Medjeu Aurit corridor modernization for H2 transmission		Less-Adv.	Non-PCI
H2T-N-756	Negru Voda - Isaccea corridor modernization for H2 transmission		Less-Adv.	Non-PCI
H2T-N-777	H2 transm. system Bulgaria (Phase 2 of SEE H2 Priority Corridor)		Less-Adv.	Non-PCI
H2T-N-856	Baltic Sea Hydrogen Collector - tie-in to the Polish system		Less-Adv.	Non-PCI
H2T-N-983	Hydrogen Highway - Southern Section		Less-Adv.	Non-PCI
H2T-N-989	Doing Hydrogen		Less-Adv.	Non-PCI
H2T-A-892	HySOW connection to Lannemezan		Less-Adv.	Non-PCI
H2T-N-996	Green Octopus Mittelsdeutschland		Less-Adv.	Non-PCI
H2T-N-999	Giurgiu - Nădlac corridor modernization for hydrogen transmission		Less-Adv.	Non-PCI
H2T-N-1011	HyONE Network NL		Less-Adv.	Non-PCI
H2T-N-1017	Levante Pipeline Project		Less-Adv.	Non-PCI
H2T-N-1025	HySOW connection to Port la Nouvelle Terminal		Less-Adv.	Non-PCI
H2T-N-1027	Connection to North Adriatic H2 Terminal		Less-Adv.	Non-PCI
H2T-N-1053	Italy - Slovenia H2 Connection		Less-Adv.	Non-PCI
H2T-N-1054	Otranto IGI H2 connection		Less-Adv.	Non-PCI
H2T-N-1187	HYALink (FR)		Less-Adv.	Non-PCI
H2T-N-1216	HySOW connection to Bordeaux Terminal		Less-Adv.	Non-PCI
H2T-N-1217	HySOW Spain to Castillon		Less-Adv.	Non-PCI
H2T-N-1226	SLOH2 Backbone - IT-SI H2 Interconnection		Less-Adv.	Non-PCI
H2T-N-1245	AtlantHYC (Phases 1-2-3)		Less-Adv.	Non-PCI
H2T-N-1252	Spanish hydrogen backbone 2040		Less-Adv.	Non-PCI
H2T-N-1255	H2 repurposing interconnection HR-HU		Less-Adv.	Non-PCI
H2T-N-1281	Hungarian-Slovenian hydrogen corridor		Less-Adv.	Non-PCI
H2T-N-1289	H2 Larrau		Less-Adv.	Non-PCI
H2T-N-1285	H2 Irún (Enagás)		Less-Adv.	Non-PCI
H2T-N-1354	H2 Backbone Murföld		Less-Adv.	Non-PCI
H2T-N-1360	H2 offshore pipeline between Morocco and Spain		Less-Adv.	Non-PCI
H2T-N-1363	Castillon - Le Mans		Less-Adv.	Non-PCI
H2T-N-1367	Dutch Hydrogen Network - South East		Less-Adv.	Non-PCI
H2T-N-1375	FRHYC		Less-Adv.	Non-PCI
H2T-N-1380	HY-SUISSE		Less-Adv.	Non-PCI
H2T-N-1389	Baltic Sea Hydrogen Collector (BHC) - Section B		Less-Adv.	Non-PCI

HYDROGEN STORAGE FACILITIES (H2S)				
H2S-F-887	H2CAST		FID	Non-PCI
H2S-F-483	HYDRA		FID	Non-PCI
H2S-A-508	H2 storage North-1		Advanced	PCI
H2S-A-565	GeoH2		Advanced	PCI
H2S-A-767	RWE H2 Storage expansion 2 Gronau-Epe		Advanced	PCI
H2S-A-1152	H2 storage North-2		Advanced	PCI
H2S-A-1238	DK Hydrogen Storage		Advanced	PCI
H2S-A-1279	Hystock		Advanced	PCI
H2S-A-1284	RWE H2 Storage Gronau-Epe - 2nd expansion		Advanced	PCI
H2S-A-1352	HySOW storage (Hydrogen South West corridor of France)		Advanced	PCI
H2S-A-579	Ajalarte		Advanced	Non-PCI
H2S-A-749	EWE Hydrogen Storage Huntorf		Advanced	Non-PCI
H2S-A-761	JemgumH2		Advanced	Non-PCI
H2S-A-802	RWE H2 Storage expansion 1-2 Staßfurt		Advanced	Non-PCI
H2S-A-805	HENRI (H2-S&D)		Advanced	Non-PCI
H2S-A-818	RWE H2 Storage expansion 1 Xanten		Advanced	Non-PCI
H2S-A-839	Clean Hydrogen Coastline - Storage Huntorf		Advanced	Non-PCI
H2S-A-1244	Hydrogen Pilot Cavern Krummhörn		Advanced	Non-PCI
H2S-A-1287	RWE H2 Storage expansion 1 Gronau-Epe		Advanced	Non-PCI
H2S-N-934	Salithy Harsfeld		Less-Adv.	PCI
H2S-N-671	SpithyGER		Less-Adv.	PCI
H2S-N-1189	Flume Treste Livello F Underground Storage		Less-Adv.	PCI
H2S-N-425	UGS Lab - H2		Less-Adv.	Non-PCI
H2S-N-574	HyCAVmobl - Hydrogen Cavern for Mobility		Less-Adv.	Non-PCI
H2S-N-673	H2Austriabavaria-Store		Less-Adv.	Non-PCI
H2S-N-674	JemgumH2		Less-Adv.	Non-PCI
H2S-N-684	UST Hydrogen Storage Krummhörn - Stage 3		Less-Adv.	Non-PCI
H2S-N-687	UST Hydrogen Storage Bierwang - Stage 2		Less-Adv.	Non-PCI
H2S-N-688	EnBW Etzel Hydrogen Storage		Less-Adv.	Non-PCI
H2S-N-691	H2-Storage Project UGS Kirchbellingen		Less-Adv.	Non-PCI
H2S-N-719	H2-Storage Blexen		Less-Adv.	Non-PCI
H2S-N-775	EWE Hydrogen Storage Nuttormoor		Less-Adv.	Non-PCI
H2S-N-823	Development of Green Hydrogen Cretan Value Chain (Cretan H2SF)		Less-Adv.	Non-PCI
H2S-N-861	NWKG H2 Storage		Less-Adv.	Non-PCI
H2S-N-862	Development of Green Hydrogen Cypriot Value Chain (Cypriot H2SF)		Less-Adv.	Non-PCI
H2S-N-907	Salithy Harsfeld II A		Less-Adv.	Non-PCI
H2S-N-981	Damalsawek Hydrogen Storage		Less-Adv.	Non-PCI
H2S-N-1024	UST Hydrogen Storage Epe - Stage 3		Less-Adv.	Non-PCI
H2S-N-1219	UST Hydrogen Storage Krummhörn - Stage 2		Less-Adv.	Non-PCI
H2S-N-1282	Yela H2 storage		Less-Adv.	Non-PCI
H2S-N-1288	RWE H2 Storage expansion 2 Xanten		Less-Adv.	Non-PCI
H2S-N-1295	UST Hydrogen Storage Epe		Less-Adv.	Non-PCI
H2S-N-1296	StorgHyN		Less-Adv.	Non-PCI
H2S-N-1297	StorgHyN 2		Less-Adv.	Non-PCI
H2S-N-1319	StorgHyN 3		Less-Adv.	Non-PCI
H2S-N-1321	HyPSTER (3rd phase)		Less-Adv.	Non-PCI
H2S-N-1364	UST Hydrogen Storage Bierwang		Less-Adv.	Non-PCI
H2S-N-1379	H2-Storage Expansion Blexen		Less-Adv.	Non-PCI
H2S-N-1391	UST Hydrogen Storage Epe - Stage 2		Less-Adv.	Non-PCI

HYDROGEN RECEPTION FACILITIES (H2L)				
	H2L-A-754	ACE Terminal		Ammonia Advanced PCI
	H2L-A-445	Eemshaven H2		Ammonia Advanced Non-PCI
★	H2L-A-1395	MB New Energy Gate Hamburg I		Ammonia Advanced Non-PCI
	H2L-N-444	Antwerp NH3 Import Terminal		Ammonia Less-Adv. PCI
	H2L-N-820	Dunkerque New Molecules development		Ammonia Less-Adv. PCI
	H2L-N-822	Vopak Energy Park Antwerp		Ammonia Less-Adv. PCI
	H2L-N-948	Green Wilhelmshaven Terminal/Storage/Cracker		Ammonia Less-Adv. PCI
	H2L-N-1099	Ammonia Import Terminal Brunsbüttel		Ammonia Less-Adv. PCI
	H2L-N-1100	Amplify Antwerp		Ammonia Less-Adv. PCI
	H2L-N-1127	Amplify Rotterdam		Ammonia Less-Adv. PCI
	H2L-N-1159	bp Wilhelmshaven Green Hydrogen Hub		Ammonia Less-Adv. PCI
	H2L-N-1325	Zebruggen New Molecules development		Ammonia Less-Adv. PCI
★	H2L-N-680	Project Eos		Liq. H2 Less-Adv. Non-PCI
	H2L-N-695	Cretan Renewable Hydrogen Export Term. (H2L Creta)		Ammonia Less-Adv. Non-PCI
	H2L-N-701	Wilhelmshaven H2 Floating Terminal		Ammonia Less-Adv. Non-PCI
	H2L-N-716	Cypriot Renewable Hydrogen Export Term. (H2L Cyprus)		Ammonia Less-Adv. Non-PCI
	H2L-N-741	Green P/Hydrolysis		Ammonia Less-Adv. Non-PCI
	H2L-N-776	Mediterranean Hydrogen Gateway		Ammonia Less-Adv. Non-PCI
	H2L-N-863	IPCEI Blue Danube		LOHC Less-Adv. Non-PCI
	H2L-N-932	Ionian Energy Terminal		Ammonia Less-Adv. Non-PCI
	H2L-N-1186	WH2V - e-NG hub		LOHC Less-Adv. Non-PCI
★	H2L-N-1224	MEDHYTERRA		Ammonia Less-Adv. Non-PCI
	H2L-N-1314	North Adriatic H2 Terminal		Ammonia Less-Adv. Non-PCI
★	H2L-N-1370	Greek H2 Terminal		Liq. H2 Less-Adv. Non-PCI
★	H2L-N-1383	SE MED Renewable H2 Reception Facility (H2L SE MED)		Liq. H2 Less-Adv. Non-PCI
★	H2L-N-1386	MB New Energy Gate Duisburg I		Liq. H2 Less-Adv. Non-PCI
★	H2L-N-1387	MB New Energy Gate Duisburg II		Liq. H2 Less-Adv. Non-PCI
★	H2L-N-1397	MB New Energy Gate Hamburg II		Liq. H2 Less-Adv. Non-PCI

KEYS

ENTSO-E currently comprises 43 TSO members, 1 Associated Partner and 9 Observers from 32 European Countries

When the same point is affected by several projects, the point is shown with the highest project status (operational, FD, advanced, non-FD, less advanced), the status from single project can vary from that. The projects are shown with the planning status reported in their TNDP 2026 submission.

All data provided on this map is for information purposes and shall be treated as indicative and non-committal in nature without pre-empting different outcomes of any possible discussion held at regional level. Under no circumstances shall it be regarded as information intended for commercial use.

Project status:

Legend for Project Status

Legend for Project Status

Project status codes:

Legend for Project Status

Cross-border points / intra-country or intra-balancing zone points

Legend for Project Status

Gas Reserve areas

Legend for Project Status

Hydrogen Transmission Pipelines (H2T)

Legend for Project Status

Hydrogen Storage Facilities (H2S)

Legend for Project Status

Hydrogen Reception Facilities (H2R)

Legend for Project Status

Hydrogen in the Transport Sector for Mobility (H2M)

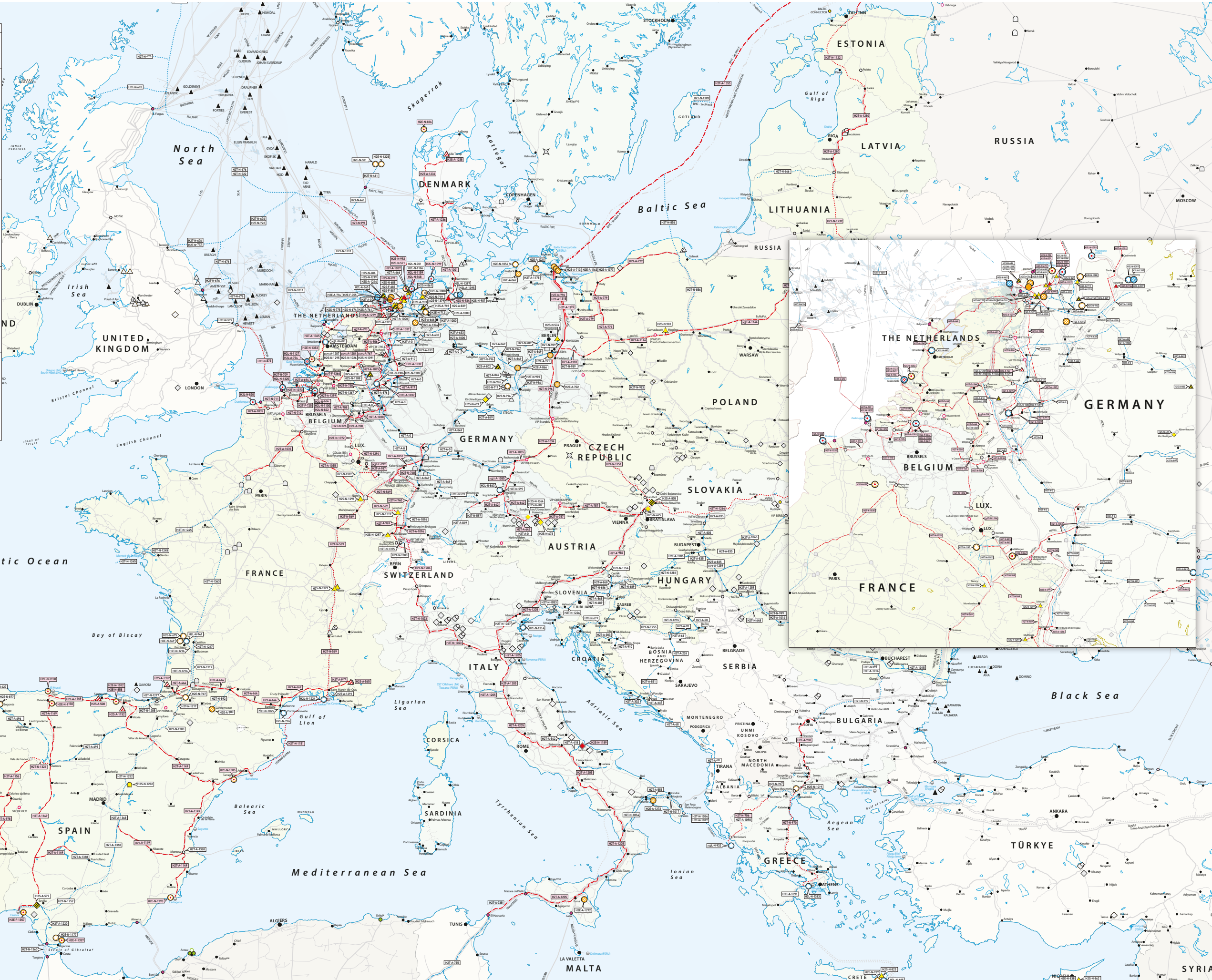
Legend for Project Status

Hydrogen Export Facilities (H2X)

Legend for Project Status

Hydrogen Production from Natural Gas (H2P)

Legend for Project Status



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6.4 HYDROGEN PROJECT EVOLUTION AND ANALYSIS

Out of the 347 investments that have been included in TYNDP 2026, 244 fall under the hydrogen category. **Figure 13** shows, a comparison of hydrogen projects versus the total amount of projects between the TYNDPs of 2020, 2022, 2024 and 2026.

From **Figure 13**, it is evident that the presence of hydrogen projects has been increasing in every TYNDP year. Compared to TYNDP 2024, where hydrogen-related subcategories accounted for 60 % of all projects, TYNDP 2026 shows an increase of around 10 %, with hydrogen projects now representing approximately 70 % of the total number of projects.

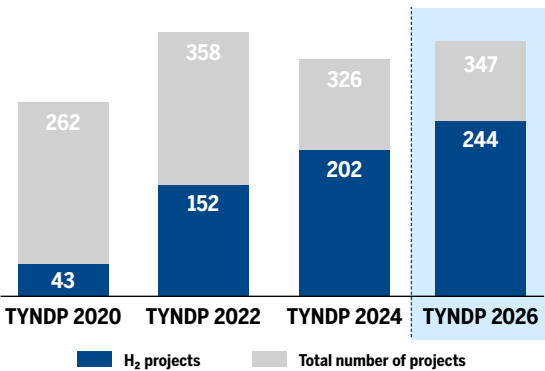


Figure 13: Evolution of total number of projects and hydrogen projects.

6.4.1 OVERVIEW PER STATUS

As mentioned in section 6.4, the number of hydrogen projects increased compared to TYNDP 2024. This increase results from:

- ▲ Partition of a larger project into different subprojects due to significant differences in the implementation timeline. Larger projects are very often multi-phased projects with significant differences in the maturity or evolution of the different (sub)-phases.
- ▲ Stronger EU decarbonisation targets, reinforcing the role of hydrogen in achieving 2030 and 2050 climate objectives.
- ▲ The further development of the hydrogen regulatory framework, including RED III targets, REPowerEU implementation, and the integration of hydrogen under TENE and the Hydrogen and Decarbonised Gas Market Package.

The following figures and tables provide a statistical overview of promoters' submissions for hydrogen (see TYNDP 2026 Annex A for further details) based on information such as the subcategory of infrastructure or the FID status or the PCI or PMI status. Those reports reflect all the details entered as part of the data collection process by hydrogen project promoters.

Figure 14 presents an overview of all the projects accepted for inclusion in TYNDP 2026 per type hydrogen subcategory – H2T, H2L, H2S and H2E.

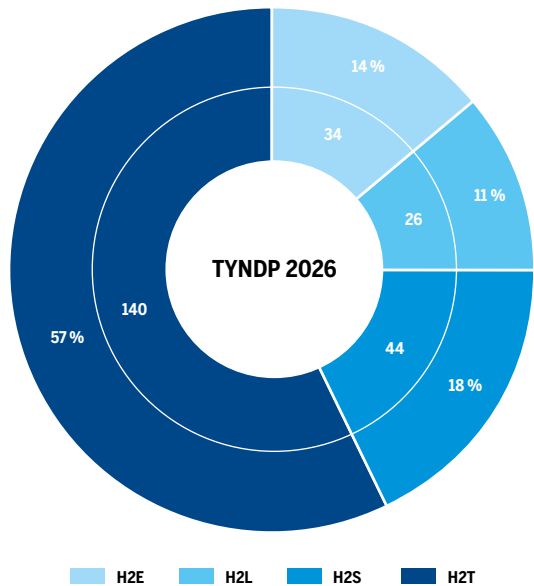


Figure 14: Project inclusion in TYNDP 2026 per subcategory of the hydrogen category. The inner circle represents absolute numbers of projects; the outer circle represents the shares of each subcategory.

In addition, **Figure 15** indicates the maturity status of the TYNDP 2026 submissions for H2T, H2L, H2S, and H2E. 69 out of the total 244 projects (28 %) are "Advanced", while 14 projects have taken FID (6 %) and 161 projects are "Less-Advanced" (66 %).

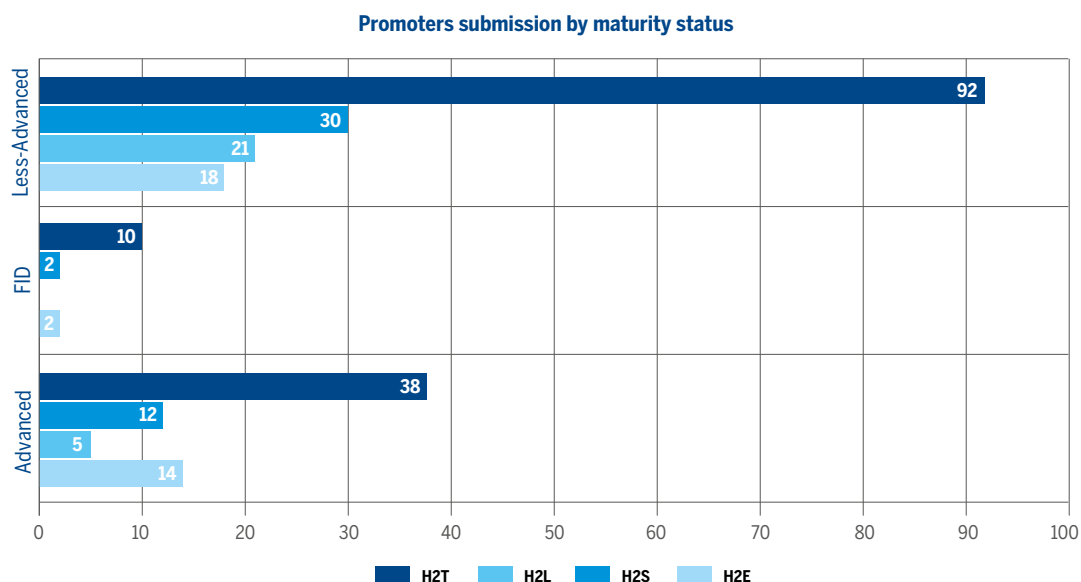


Figure 15: Projects by maturity status – H2T, H2L, H2S and H2E.

Compared to the previous TYNDP, projects with FID increased from 4 (≈2 %) in 2024 to 14 (6 %) in 2026. In addition, the share of “Less-Advanced” projects has increased significantly, from 54 %

(110/202) in TYNDP 2024 to 66 % (161/244) in TYNDP 2026. Finally, the proportion of “Advanced” projects dropped from 43 % (88 projects) in 2024 to 28 % (69 projects) in 2026.

6.4.2 OVERVIEW OF PROMOTERS' SUBMISSIONS PER GEOGRAPHICAL LOCATION

The following figures provide an overview of promoters' submissions based on their geographical location, infrastructure type and maturity status for the five subcategories H2T, H2L, H2S, and H2E.

For TYNDP 2026, 244 projects relevant for the four above-mentioned subcategories were included for 30 countries, three supply corridor projects that bring hydrogen to the EU borders were submitted from non-EU countries¹¹.

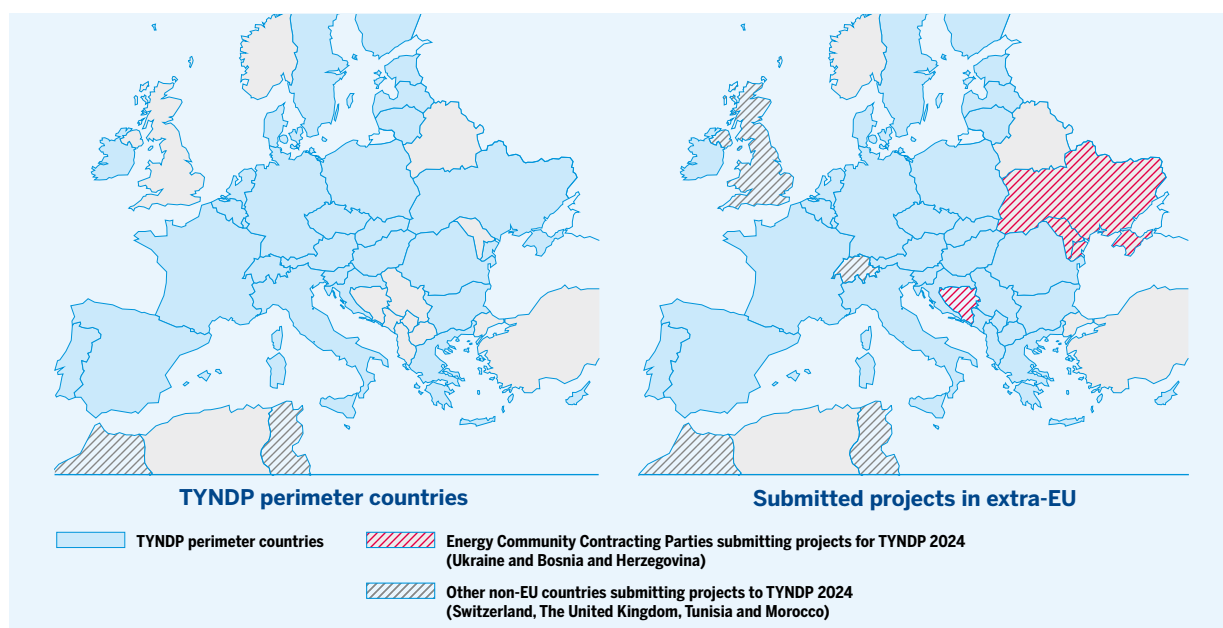


Figure 16: TYNDP perimeter countries and countries outside the European Union for which H2T, H2L, H2S and H2E projects were submitted to TYNDP 2026.

¹¹ Bosnia Herzegovina, the United Kingdom, Ukraine, Morocco, Tunisia, Luxembourg and Switzerland.

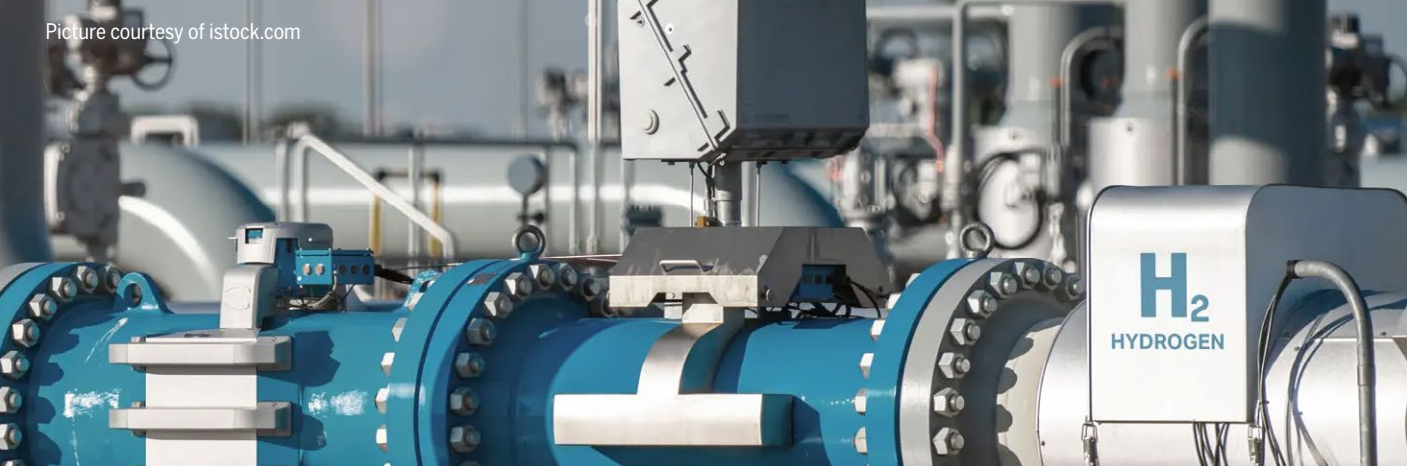


Figure 17 presents the number of projects per country and per subcategory and Figure 18 the number of projects per country and their maturity status.

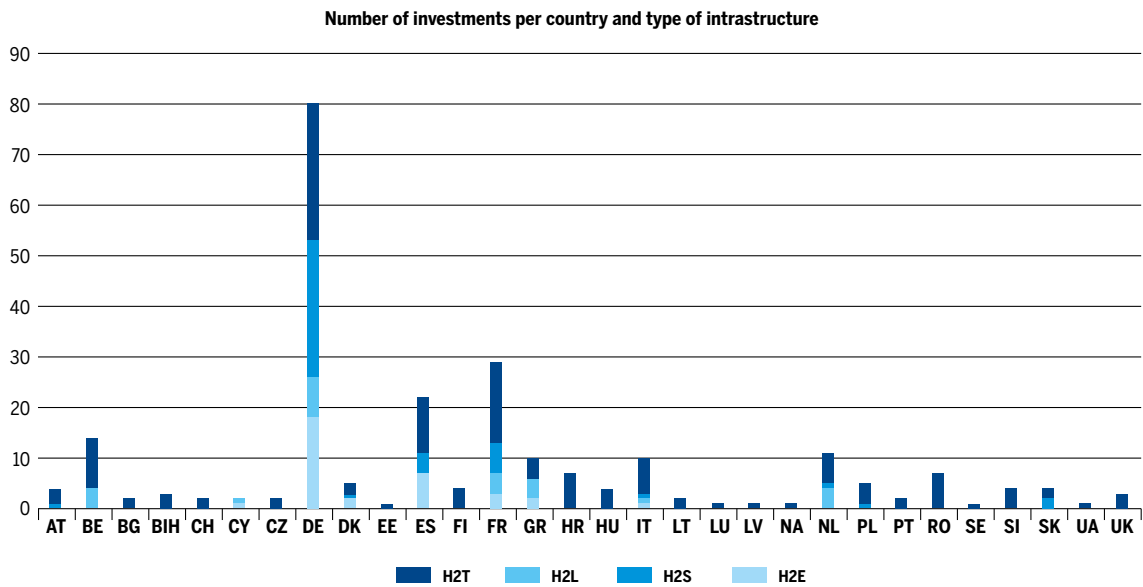


Figure 17: Number of projects per country and hydrogen subcategory – H2T, H2L, H2S and H2E.

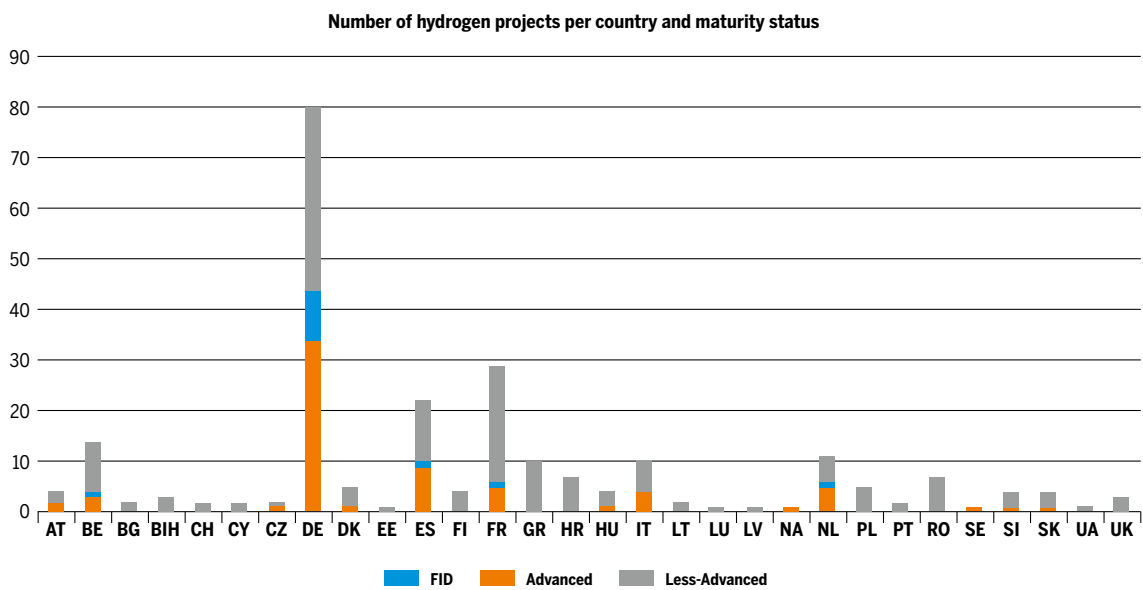


Figure 18: Number of hydrogen projects per country and maturity status – H2T, H2L, H2S and H2E.

6.4.3 ANALYSIS OF PROJECT SCHEDULE

Figure 19 and Figure 20 show the distribution of projects included in TYNDP 2026 according to the expected (first) commissioning year, also in an aggregated way.

The majority of projects in the H2T, H2L, H2S, and H2E subcategories are expected to be commissioned by 2035, accounting for 211 out of 244 projects (86 %). In TYNDP 2024, most hydrogen projects were expected to be commissioned earlier, with 150 out of 202 projects (74 %) planned for completion by 2029.

In contrast, TYNDP 2026 shows a shift toward later timelines, with only 56 projects (23 %) expected to be commissioned by 2029. Nevertheless, by 2035, a large share of projects is still expected to be delivered, comparable to TYNDP 2024, where 191 out of 202 projects (95 %) were scheduled for commissioning by that year.

It should be noted that several years are not displayed in the graph, indicating that there are no projects to be commissioned during those periods.

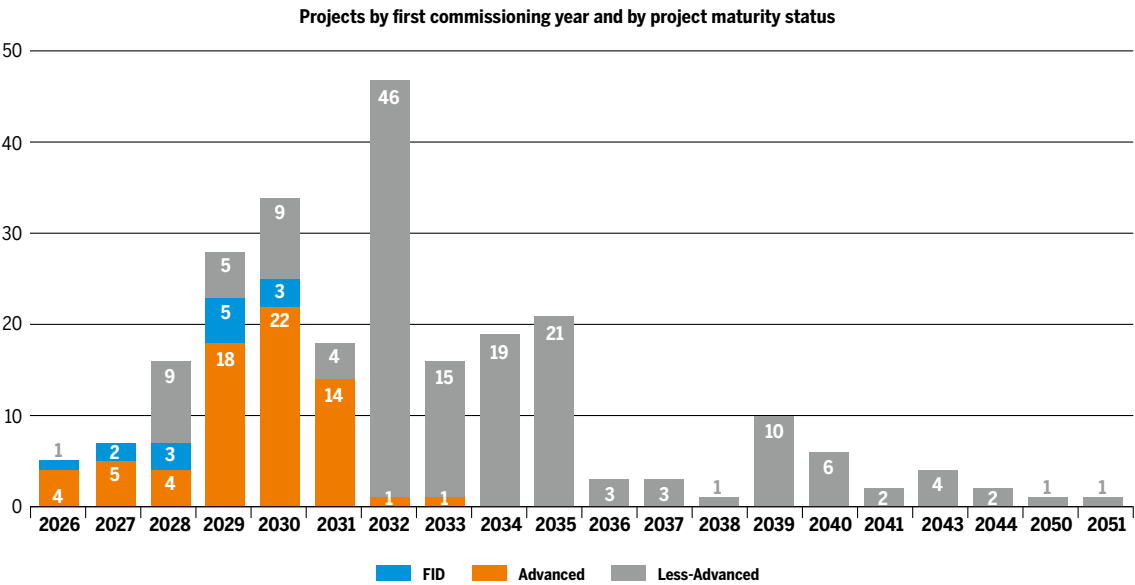


Figure 19: Projects by commissioning year and by project maturity status – H2T, H2L, H2S and H2E.

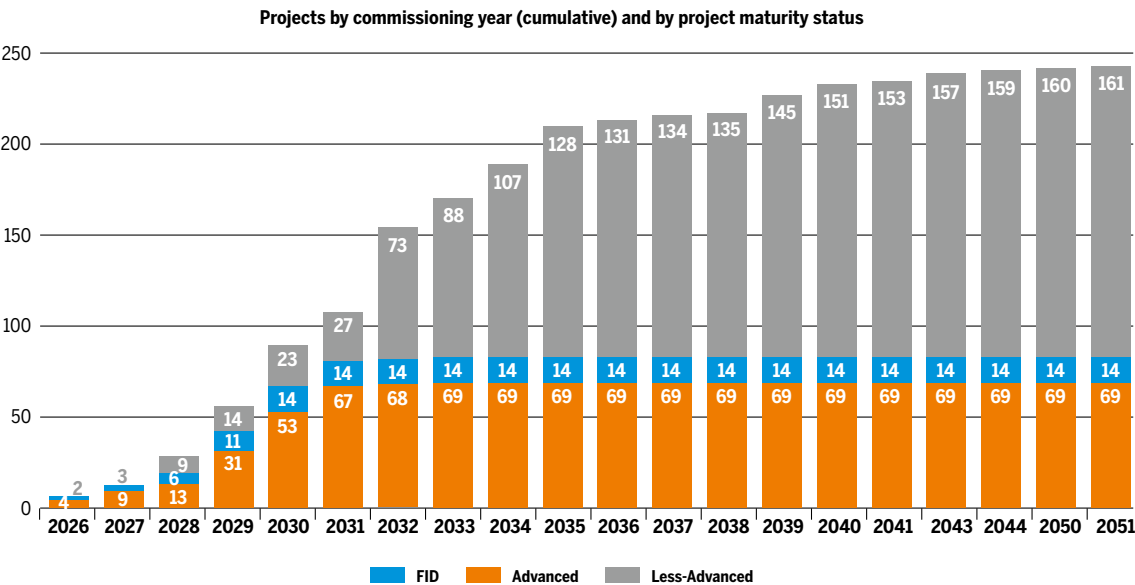


Figure 20: Projects by commissioning year (cumulative) and by project maturity status – H2T, H2L, H2S and H2E.

As part of the TYNDP 2026 Project Collection, promoters are required to provide information (with the exception of some specific situations) regarding the main project phases and the expected FID date (i.e., Feasibility study, FEED, Permitting, FID, Construction and Commissioning).

ENTSOG analysed the provided data, considering that among hydrogen infrastructure projects a significant proportion is less advanced. Therefore, the development and the time schedule of these projects are more susceptible to changes according to the development of the projects.

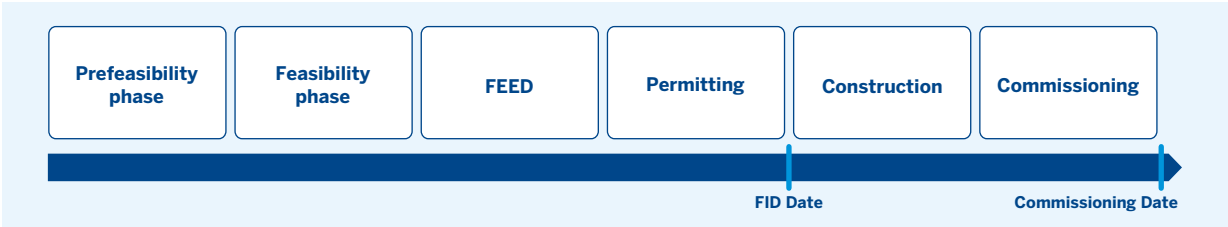


Figure 21: Simplified representation of the main project phases.

It should be noted that phases might not be consecutive and might overlap depending on project subcategory and/or country. In addition, FID in many cases is expected after the permitting phase and before starting the construction phase. However, this can vary.

In case of the **Feasibility Study phase**, the start and end dates, either past or expected, have been provided for 216 hydrogen projects. The average duration of the Feasibility Study phase for these projects is 14,5 months. In addition, 103 investments have indicated the completion of the feasibility study until the end of the project data collection phase. 40 projects have started the feasibility study before the end of the project data collection phase but are still ongoing with the latest finalisation date in September 2028. The remaining 73 projects are expected to start their feasibility study in 2026.

Regarding the **FEED phase**, the start and end dates, either past or expected, have been provided for 234 hydrogen projects. The average duration of the FEED phase for hydrogen projects is more than 18 months. 43 projects have indicated to complete the FEED phase until the end of the project data collection phase. 47 investments have started FEED phase before the end of the project data collection phase, but are still ongoing with the latest finalisation date in March 2030. The remaining 144 projects have not started the FEED phase by the end of 2025.

In case of the **Permitting phase**, the start and end dates, either past or expected, have been provided for 232 hydrogen projects. The average duration of the Permitting phase for these projects is 27 months.

More specifically, 11 projects have completed the permitting phase until the end of the project data collection phase. 66 projects have started the permitting process before the end of the project data collection phase but are ongoing with the latest finalisation date provided as December 2030. The remaining hydrogen projects are projected to conclude the permitting process at later dates, with the latest anticipated completion in June 2041.

The **FID date**, either past or expected, has been provided for 224 hydrogen projects. The average expected FID date is May 2029. 123 projects indicated an expected FID date prior to the average FID date.

Regarding the **Construction phase**, the start and end dates, either past or expected, have been provided for 241 hydrogen investments. The average duration of the Construction phase for these projects is 38 months. 12 projects have started their construction prior the end of 2025. The remaining hydrogen projects have foreseen the start of the construction after the end of the project collection with the latest end date in July 2041.

Figure 21 below provides all the information for the different phases described.

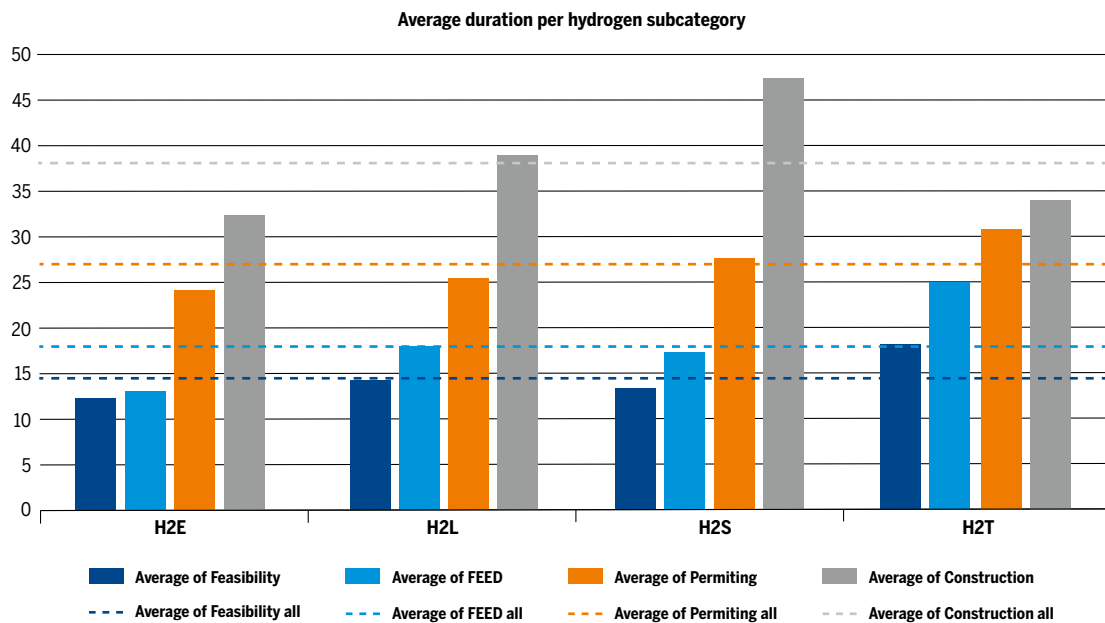


Figure 22: Average duration of Feasibility, FEED, Permitting and Construction phase – H2E, H2L, H2S and H2T.

The Commissioning year has been provided for all the hydrogen projects in TYNDP 2026. The average Commissioning year for these projects is 2034 with 114 hydrogen investments expected to be commissioned by the end of 2032, while the remaining 130 are expected to be commissioned until 2051.

The estimation of average duration for the different project phases (feasibility, FEED, permitting and construction) for hydrogen infrastructure is lower than the average durations provided for Natural gas

infrastructure projects as described in section 7.4.3, with the lowest difference of 10 % for construction phase and with a highest difference of 48 % for Feasibility phase.

Project promoters estimated their project's schedule based on the best available information at the time of submission. However, considering that hydrogen projects are generally less mature than natural gas infrastructure, it could be possible that above-mentioned difference might be even lower.

Status	Completed in TYNDP 2026	FID in TYNDP 2026	Advanced in TYNDP 2026	Less Advanced in TYNDP 2026	Cancelled/Not resubmitted to TYNDP 2026	Total
FID (TYNDP 2024)	0	1	0	0	3	4
Advanced (TYNDP 2024)	0	6	32	37	13	88
Less-Advanced (TYNDP 2024)	0	3	13	62	32	110
Total	0	10	45	99	48	202

Table 2: Evolution of projects from TYNDP 2024 to TYNDP 2026 (H₂ categories)

170 hydrogen projects stated their scheduled status:

- ▲ 48 hydrogen projects are delayed;
- ▲ 44 hydrogen projects are on time;
- ▲ 77 hydrogen projects are rescheduled.
- ▲ One hydrogen project is ahead of schedule

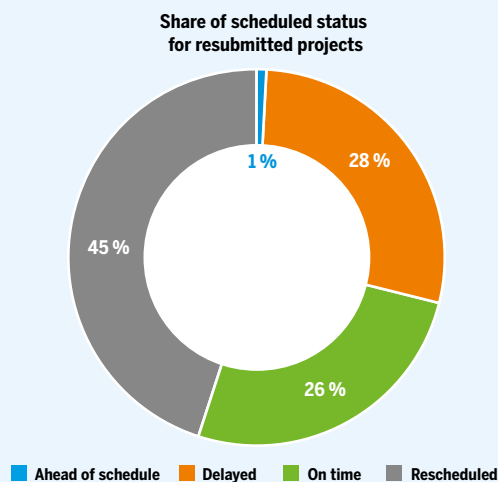


Figure 23: Share per scheduled status for resubmitted hydrogen projects.

Reported delays of delayed and rescheduled natural gas projects from TYNDP 2024 to TYNDP 2026

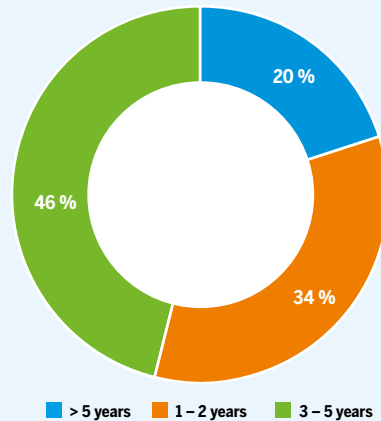


Figure 24: Reported delays from TYNDP 2024 to TYNDP 2026 for hydrogen projects.

Among the main reasons indicated by promoters for delay and rescheduling are:

- ▲ Permitting, environmental & land-use delays: **27 projects**
- ▲ Regulatory & policy framework uncertainty: **22 projects**
- ▲ Market maturity, demand & commitment uncertainty: **29 projects**
- ▲ Financing, subsidies & funding dependencies: **18 projects**
- ▲ Coordination & alignment with other projects/networks: **20 projects**
- ▲ Technical design changes, scope evolution: **8 projects**
- ▲ Planning, studies & engineering execution issues: **6 projects**
- ▲ External events & force-majeure factors: **2 projects**

Market, regulatory and financing factors are the dominant delaying and rescheduling reasons for hydrogen projects, indicating that the drivers are systemic, rather than technical. In addition, permitting represents one-fifth of all real delays, while pure technical or execution issues are marginal.

6.4.4 INVESTMENT COSTS

Investment costs are for project promoters in many cases deemed as commercially sensitive information. Sharing this information might potentially negatively affect the competitive position of project promoters vis-à-vis contractors.

On that basis, and as part of the transparency process adopted, ENTSG has collected information from promoters on indicative investment costs for all submitted projects.

In line with section 4.1 of the GPI, the cost data submitted by the project promoters for the projects to be included in the TYNDPs is made public by ENTSG unless the data is deemed confidential by the respective project promoters.

The total CAPEX for hydrogen projects is approximately €192 billion, with the majority of investment (70 %) concentrated in “Less-Advanced” projects.

As seen in **Figure 26**, H2T projects (57 % of the total number of hydrogen projects) cover the highest share of the hydrogen project capital expenditures (60 %). Furthermore, H2T is further separated into new, repurposed or a mix of new and repurposed transmission infrastructure. The biggest proportion is invested in new infrastructure (63 % of the total H2T investment cost).

In addition, more than half of the total costs for hydrogen projects are planned to take place until 2034 (58 %), with a peak in 2032 of more than 70 billion euros (see [Figure 27](#)).

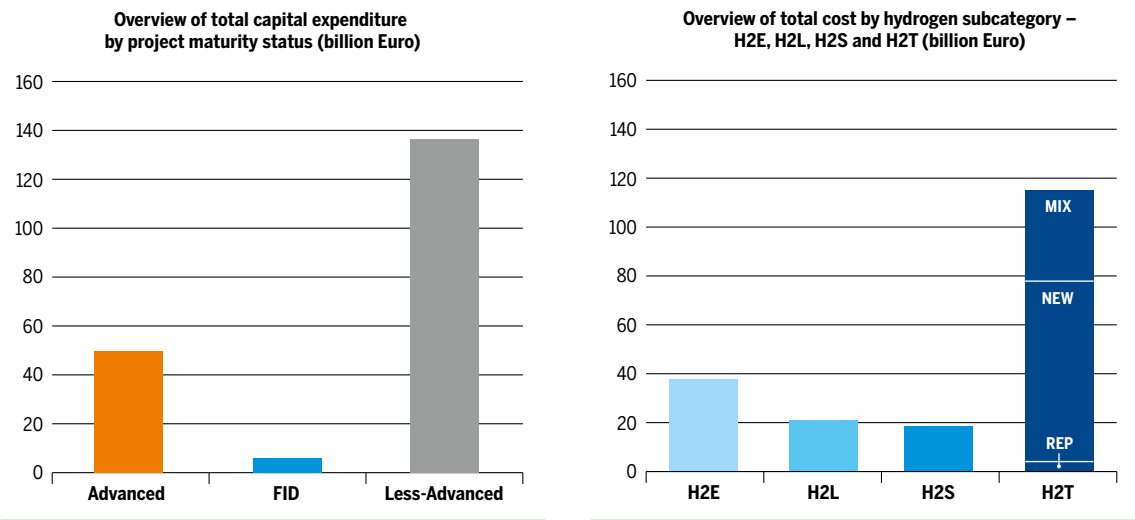


Figure 25: Overview of total investment cost by project maturity status for hydrogen category.

Figure 26: Overview of total cost by hydrogen subcategory – H2E, H2L H2S and H2T.

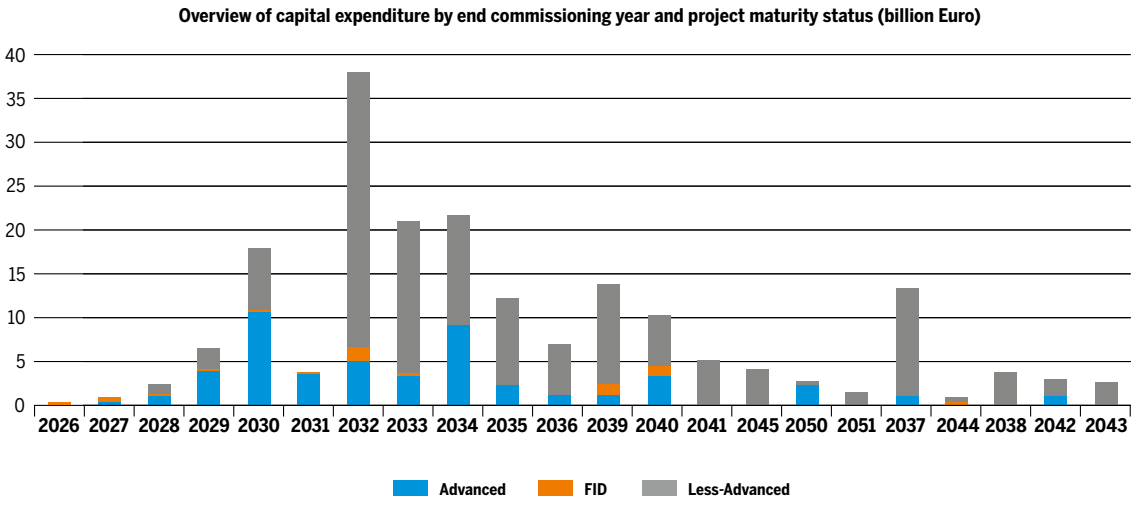


Figure 27: Overview of costs by end commissioning year and project maturity status – H2E, H2L, H2S and H2T.

It should be noted that, several years are not displayed in the graph, indicating that no cost values were recorded for those periods.

Figure 28 presents the average cost per kilometer for the different pipeline diameters submitted under the H2T subcategory. The graph includes only onshore sections and distinguishes between new and repurposed sections.

In both cases, is evident the cost per kilometer and the pipeline diameter are correlated positively. Repurposed sections follow a flatter slope, indicating less sensitivity to diameter change, while new sections present a steeper slope. It should be noted that for some projects, compressor stations are included in the CAPEX, thus the cost per kilometre might appear higher than the average cost for a particular diameter.

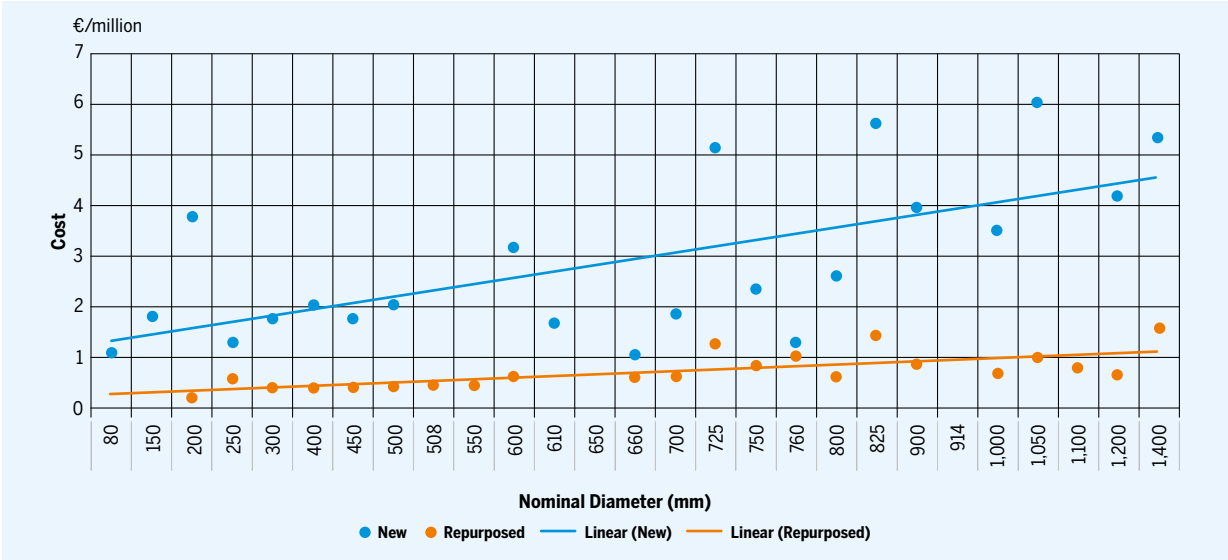


Figure 28: Average cost (EUR/km) per diameter of hydrogen pipeline



6.4.5 TYNDP 2026 SUBMISSIONS AND NATIONAL DEVELOPMENT PLANS

The Community-wide network development plan is required to build on national ten-year network development plans, as specified in [Regulation \(EU\) 2024/1789](#), in Article 32 (a), for natural gas and Article 60 (a), for hydrogen. As the Union-wide TYNDP is a non-binding exercise, this does not prevent, from a legal perspective, that projects are submitted to the TYNDP even if they are not part of a national development plan (NDP). Further, in Article 26 of the Regulation, it is described how ACER can mandate a review of either a national or the Union-wide TYNDP, in case of inconsistencies.

In line with the annex III of the GPI, promoters should indicate if their initiatives are part of the NDP. In case not, the reason for which projects are not part of the NDP must be specified.

Furthermore, ENTSOG initiated a feedback loop with ACER and NRAs to collect relevant feedback and comments.

Out of the total number of projects that were listed under the hydrogen category, 93 (38 %) were included in the NDPs, while the remaining 151 were not. Starting in TYNDP 2022 with the first introduction of hydrogen projects, the harmonisation between TYNDP and NDPs was 17 %, followed by 33 % in TYNDP 2024. The level of consistency between the TYNDP and the NDPs increases steadily across the TYNDP cycles, demonstrating stronger alignment in planning assumptions.

The subcategory with the highest number of included projects was H2T (63), followed by H2S (15), H2E (10) and H2L (5).

Country	Part of NDP	NOT Part of NDP	Country	Part of NDP	NOT Part of NDP
AT	3	1	IT	10	–
BE	4	10	LT	2	–
BG	2	–	LU	–	1
BIH	–	3	LV	1	–
CH	–	2	MT	–	–
CY	–	2	NA	1	–
CZ	2	–	NL	10	1
DE	32	48	NO	–	–
DK	2	3	PL	–	5
EE	1	–	PT	2	–
ES	–	22	RO	7	–
FI	1	3	SE	1	–
FR	–	29	SI	–	4
GR	1	9	SK	4	–
HR	2	5	UA	1	–
HU	4	–	UK	–	3
IE	–	–			

Table 3: Overview of hydrogen projects being part or not of NDPs by country – H2T, H2S, H2L and H2E.

For the projects reported as not part of any NDP, promoters have generally indicated one of the following reasons:

- ▲ Projects will be proposed for inclusion in the next NDP;

- ▲ Lack of legal obligation to draft a national development plan for hydrogen grids;

- ▲ Projects was covered through alternative frameworks;

6.5 TYNDP 2026 HYDROGEN PROJECTS BEING PART OF THE 2nd PCI LIST UNDER THE TEN-E REGULATION

ENTSOE also collects information related to projects already having the PCI or PMI status and projects that intend to apply to the following PCI and PMI selection process.

The [EC's 2nd Union list of PCIs and PMIs](#) under the TEN-E Regulation was published on 01.12.2025.

From the Union list, 106 projects items are included in the TYNDP 2026 of which 74 were submitted as H2T subcategory, while the remaining 27 were submitted under the H2S (19), H2L (8) and H2E (5) subcategories. In comparison, the 1st PCI/PMI list under the TEN-E included 58 projects that had been submitted to TYNDP 2024 across the H2T, H2S, and H2L subcategories.

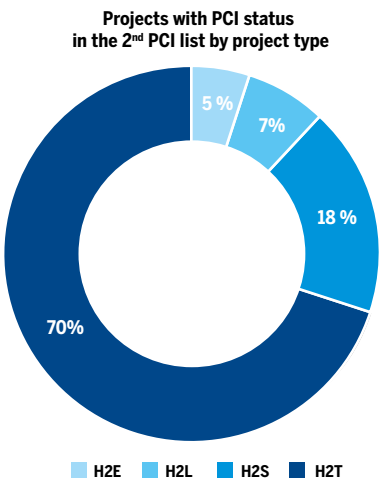


Figure 29: Projects having PCI or PMI status in the 2nd Union list by subcategory.

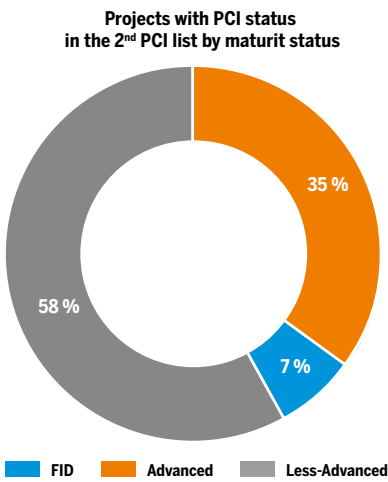


Figure 30: Hydrogen projects having PCI or PMI status in the 2nd Union list by maturity status.

It should be noted that the TEN-E Regulation does not require electrolyser projects, CO₂ and smart gas grid projects to be part of the TYNDP in order to be eligible for PCI or PMI status. Thus, out of the 21 H2E projects included in the Union list, only 5 were submitted to the TYNDP 2026.

7 PROMOTERS' SUBMISSIONS FOR NATURAL GAS TO TYNDP 2026

A total of 77 natural gas submissions have been included in TYNDP 2026 under the TRA, LNG and UGS subcategories, compared to 95 that were submitted to TYNDP 2024.

7.1 GAS TRANSMISSION PIPELINE PROJECTS INCLUDING COMPRESSOR STATIONS (TRA)

Today, around 209,065 km of transmission pipelines exist in the EU, Switzerland and the UK. The data included in the map represent the total length of 46 TSOs' transmission pipelines. The definition of transmission pipeline might differ country by country.

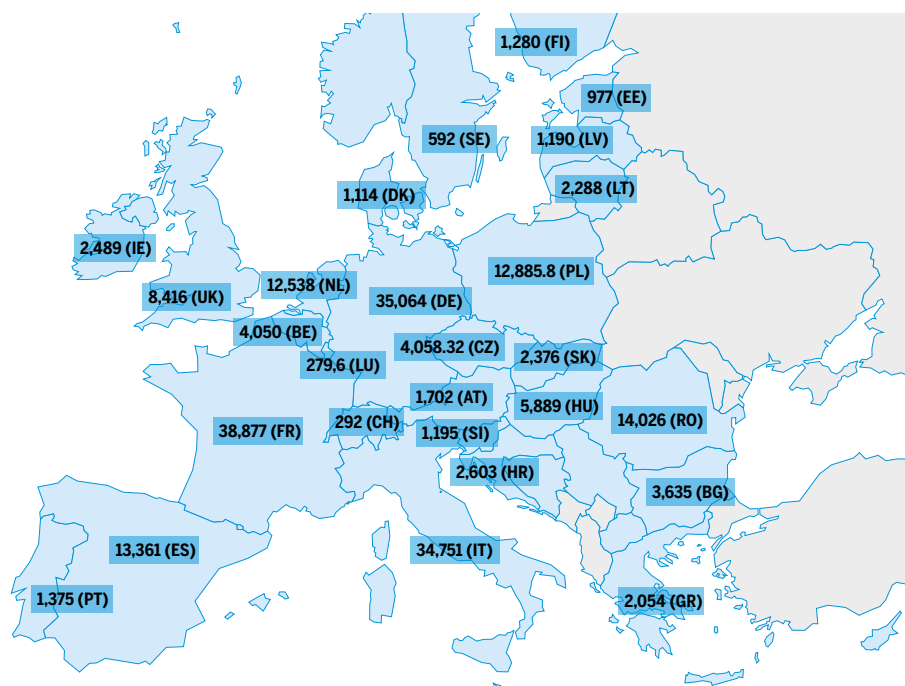


Figure 31: Transmission length in EU, CH and UK in km (year 2026)

62 TRA projects have been submitted to TYNDP 2026. These projects can be summarised as follows:

- ▲ 20 interconnection projects between two or more countries. In some cases, only one side of the interconnection has been submitted since the other part exists or the project consists of the creation of additional capacity at the same IP where an interconnection already exists;
- ▲ 6 projects related to the construction/expansion of compressor or metering stations;
- ▲ 19 projects related to LNG integration/evacuation or production development;
- ▲ 6 projects related to expansion of an existing pipeline;
- ▲ 1 project concerning the upgrade, modernisation or enhancement of the system;
- ▲ 5 reverse flow projects to enable or enhance bi-directional flows;
- ▲ 5 projects related to domestic supply or new demand connection to the grid;

The following map shows the list of all projects concerning transmission and compressor (or metering) stations development. Evacuation pipelines to connect regasification terminals or storages are considered as part of section 7.2.

MAP FOR TRANSMISSION, STORAGE, LNG PROJECTS, BIOMETHANE & OTHER INFRASTRUCTURE IN TYNDP 2026

TRANSPORT BY PIPELINES (INCL. COMPRESSOR STATIONS)				
TRA-F-459	Stazione di Spinta "Corridonia"		FID	PCI
TRA-F-7	Development for new import from the South (Adriatic Line)		FID	Non-PCI
TRA-F-75	LNG evacuation pipeline Zlobin-Bosiljevo-Sisak-Kozarac		FID	Non-PCI
TRA-F-192	Entry capacity expansion GATE terminal		FID	Non-PCI
TRA-F-298	Modernization and rehabilitation of the Bulgarian GTS - Phase 3		FID	Non-PCI
TRA-F-505	Lucera - San Paolo		FID	Non-PCI
★ TRA-F-570	Expansion Compressor Station Rehden		FID	Non-PCI
TRA-F-607	Transmission Hybrid Compressor Stations		FID	Non-PCI
TRA-F-786	Capacity Expansion for the German LNG Terminals		FID	Non-PCI
★ TRA-F-891	TAG Reverse Flow Capacity Increase		FID	Non-PCI
TRA-F-967	Pipeline Nea Messimvria - Evzoni / Gevelija and Metering Station		FID	Non-PCI
TRA-F-971	Booster Compressor Station for TAP in Nea Messimvria		FID	Non-PCI
TRA-F-988	LNG Terminal Stade - Grid Integration		FID	Non-PCI
TRA-F-1114	Grid extension for LNG Wilhelmshaven		FID	Non-PCI
TRA-F-1124	Capacity Increase Bulgaria to Romania (Rupcha-Vetrino Looping)		FID	Non-PCI
Ⓢ Ⓢ TRA-F-1140	Technical capacity increase gas transm. GR to BG		FID	Non-PCI
TRA-F-1145	Export enhancements phase 1		FID	Non-PCI
★ TRA-F-1175	NEL Compressor Station Wittenburg		FID	Non-PCI
TRA-F-1275	Zeebrugge-Opwijk		FID	Non-PCI
★ TRA-F-1384	Expansion of the Podgor and Bipești compressor stations		FID	Non-PCI
TRA-A-330	EastMed Pipeline		Advanced	PCI
TRA-A-10	Posidonia Pipeline		Advanced	Non-PCI
TRA-A-31	Melita TransGas Hydrogen Ready Pipeline		Advanced	Non-PCI
TRA-A-413	Measures to connect the LNG-Terminal Rostock to the ONTRAS grid		Advanced	Non-PCI
★ TRA-A-720	Complementary project GCA Reverse Flow		Advanced	Non-PCI
TRA-A-736	Duplication of the High Pressure branch Karper - Komotini		Advanced	Non-PCI
TRA-A-810	TAP Expansion		Advanced	Non-PCI
TRA-A-1009	Czech-Polish Gas Interconn. Bezměrov (CZ) - Hat (CZ/PL Border)		Advanced	Non-PCI
TRA-A-1058	LNG Evacuation Pipeline Kozarac-Slobodnica		Advanced	Non-PCI
TRA-A-1141	Czech-Polish Gas Interconnection - PL section		Advanced	Non-PCI
TRA-A-1195	Matagola - Massafra pipeline		Advanced	Non-PCI
TRA-A-1268	Romania-Serbia Interconnection		Advanced	Non-PCI
★ TRA-A-1385	Expansion of the Jupa CS and new Recas-Horia pipeline		Advanced	Non-PCI
★ TRA-A-1598	Interconnection Croatia-Slovenia Zabok-Jezersce-Sotla (Rogatec)		Advanced	Non-PCI
Ⓢ TRA-N-9	Additional Southern developments		Less-Adv.	Non-PCI
TRA-N-94	CS Kidričevo, 2nd phase of upgrade		Less-Adv.	Non-PCI
TRA-N-99	M3/1a Šempeter - Ajdovščina		Less-Adv.	Non-PCI
TRA-N-112	R15/1 Pince - Lendava - Kidričevo		Less-Adv.	Non-PCI
TRA-N-245	North - South Gas Corridor in Eastern Poland		Less-Adv.	Non-PCI
TRA-N-389	Upgrade of Murfeld/Cersak Interconn. (M1/3 Interconn. Cersak)		Less-Adv.	Non-PCI
TRA-N-390	Upgrade of Rogatec interconnection (M1A/1 Interconn. Rogatec)		Less-Adv.	Non-PCI
TRA-N-602	Upgrading GMS Isaccea 2 and GMS Negru Voda 2		Less-Adv.	Non-PCI
TRA-N-603	Capacity increase at RO-BG IP Ruse Giurgiu		Less-Adv.	Non-PCI
TRA-N-628	Eastring - Slovakia		Less-Adv.	Non-PCI
TRA-N-670	IGB 3to5 Expansion & H2 Upgrade (the Project)		Less-Adv.	Non-PCI
★ TRA-N-718	Poland-Ukraine Gas Interconnector (UA section)		Less-Adv.	Non-PCI
TRA-N-766	Entry Murfeld		Less-Adv.	Non-PCI
TRA-N-888	Upgrading GMS Isaccea 3 and GMS Negru Voda 3		Less-Adv.	Non-PCI
TRA-N-954	Complementary Project TAG Reverse Flow Weitenhof		Less-Adv.	Non-PCI
TRA-N-1043	Export to Malta		Less-Adv.	Non-PCI
★ TRA-N-1067	Otranto IGI Natural Gas connection		Less-Adv.	Non-PCI
TRA-N-1080	Interconnection between NTS and the Black Sea LNG Terminal		Less-Adv.	Non-PCI
TRA-N-1091	Connection of DESFA's transmission system with East Med pipeline		Less-Adv.	Non-PCI
TRA-N-1131	Reinforcement of NGTS-South section		Less-Adv.	Non-PCI
TRA-N-1143	Capacity intensification of the Poland - Slovak Interconnector		Less-Adv.	Non-PCI
Ⓢ TRA-N-1169	Trans-Balkan Bi-directional Flow (Third stage)		Less-Adv.	Non-PCI
TRA-N-1170	Maritsa East pipeline		Less-Adv.	Non-PCI
TRA-N-1194	Sardinia Methanization		Less-Adv.	Non-PCI
TRA-N-1235	Firm transmission capacity increase at the IP Velké Zlivoce		Less-Adv.	Non-PCI
TRA-N-1260	Reverse Flow at IP Cieszyn		Less-Adv.	Non-PCI
★ TRA-N-1376	Pipeline Monforte-Èvora		Less-Adv.	Non-PCI
★ TRA-N-1394	Expansion transmission system, part of the Vertical Corridor		Less-Adv.	Non-PCI
LNG IMPORT TERMINALS				
LNG-F-947	FSRU terminal in Gdańsk		FID	Non-PCI
LNG-A-1005	Thrace LNG Terminal		Advanced	Non-PCI
★ LNG-A-1186	WH2V - e-NG hub		Advanced	Non-PCI
★ LNG-A-1393	FSRU 2 terminal in Gdańsk		Advanced	Non-PCI
LNG-N-304	Italy-Sardinia Virtual Pipeline		Less-Adv.	Non-PCI
LNG-N-815	LNG terminal Krk 2nd phase		Less-Adv.	Non-PCI
★ LNG-N-908	LNG terminal located on the Black Sea shore		Less-Adv.	Non-PCI
UNDERGROUND GAS STORAGE FACILITIES				
UGS-F-138	UGS Chiren Expansion		FID	Non-PCI
UGS-F-260	System Enhancements - Stogit - on-shore gas fields		FID	Non-PCI
UGS-F-311	Bilicuresti daily withdrawal capacity increase		FID	Non-PCI
UGS-F-398	Ghercesti underground gas storage in Romania		FID	Non-PCI
UGS-A-371	Sarmasel underground gas storage in Romania		Advanced	Non-PCI
UGS-A-1182	Altinsone UGS Enhancement		Advanced	Non-PCI
UGS-N-397	Falciene UGS		Less-Adv.	Non-PCI
UGS-N-606	Modernization of natural gas storage infrastr. - Balaceanca UGS		Less-Adv.	Non-PCI
UGS-N-659	RENC-7 and RENC-8 Carriço UGS caverns		Less-Adv.	Non-PCI
BIOMETHANE DEVELOPMENT PROJECTS				
Ⓢ BIO-N-547	Biomethane : Reverse flow Projects		REVERSE	Less-Adv.
Ⓢ BIO-N-728	Biomethane: connection of production units		PROG-INJ	Less-Adv.
Ⓢ BIO-N-1245	Biomethane productions interconnection		PROG-INJ	Less-Adv.
★ BIO-N-1378	Monforte Biomethane Discharge Station		PROG-INJ	Less-Adv.
SYNTHETIC METHANE PROJECTS				
SYN-F-305	PEGASUS		SYN	FID
CO2 TRANSPORT AND/OR STORAGE				
Ⓢ CO2-F-1269	Belgian CO2 Transmission Facilities		CO2	FID
CO2-A-1157	Italian CO2 Network		CO2	Advanced
CO2-N-456	SAVA aquifer CO2 transmission cluster		CO2	Less-Adv.
CO2-N-551	DRAVA aquifer CO2 transmission cluster		CO2	Less-Adv.
CO2-N-554	OSJEK aquifer CO2 transmission cluster		CO2	Less-Adv.
★ CO2-N-1218	NWC02-transport pipeline		CO2	Less-Adv.
★ CO2-N-1223	CCS - depleted fields conversion in Slovakia		CO2	Less-Adv.
OTHER INFRASTRUCTURE RELATED PROJECTS				
OTH-A-743	Impulse 2025		OTH	Advanced
OTH-A-1201	Reduction of transmission system methane emissions		OTH	Advanced
OTH-A-1242	Modernisation of compressor units		OTH	Advanced
OTH-N-322	North Sea Wind Power Hub		OTH	Less-Adv.
OTH-N-984	Pycasso		OTH	Less-Adv.
★ OTH-N-679	Hub C0net2 Norte		OTH	Less-Adv.
★ OTH-N-849	Hub C0net2 Cataluña		OTH	Less-Adv.
★ OTH-N-870	Hub C0net2 Levante		OTH	Less-Adv.
★ OTH-N-871	Hub C0net2 Atlántico		OTH	Less-Adv.
OTH-N-920	Measures for the reduction of methane emissions		OTH	Less-Adv.
RETROFITTING INFRASTRUCTURE FOR HYDROGEN (RET)				
Retrofitting : infrastructure upgrades to allow hydrogen blends				
RET-N-558	Smartening up existing BG gas transm. network (SmartSwitch)		Less-Adv.	Non-PCI
RET-N-641	Adjustment of existing eus pipeline SK-HU		Less-Adv.	Non-PCI
RET-N-973	Smartening up existing GR gas transm. network (SmartSwitch)		Less-Adv.	Non-PCI
RET-N-1049	H2RENGRID - Transport Network		Less-Adv.	Non-PCI
RET-N-1050	H2RENGRID - Carriço UGS		Less-Adv.	Non-PCI

Figure 32: Map For Transmission, Storage, LNG Projects, Biomethane & Other Infrastructure in TYNDP 2026

7.2 RECEPTION AND STORAGE AND REGASIFICATION OR DECOMPRESSION FACILITIES FOR LIQUIFIED NATURAL GAS OR COMPRESSED NATURAL GAS (LNG)

For TYNDP 2026, promoters submitted 6 projects related to LNG terminals. Two of these projects are concerning expansion of an already existing LNG terminal.

7.3 UNDERGROUND STORAGE FACILITY (UGS)

For TYNDP 2026, promoters submitted 9 projects related to underground gas storage facilities (UGS). Five of these projects are concerning expansion/enhancement of existing storage facilities, while one is related to the modernisation.

7.4 FURTHER DETAILS ON THE TYNDP 2026 PROMOTERS' SUBMISSIONS FOR NATURAL GAS PROJECTS

Similar to chapter 6, this section provides more details on the investments under category TRA, LNG and UGS submitted to TYNDP 2026.

95 projects in total aim to transport and store natural gas or to receive LNG.

In **Figure 33**, a comparison between the TYNDPs of 2020, 2022, 2024 and 2026 in terms of natural gas projects is presented.

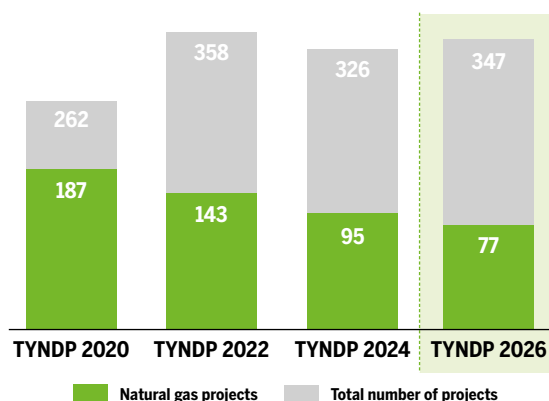


Figure 33: Evolution of total number of projects and Natural gas projects.

From the **Figure 33**, a clear and steady decline in the number and share of natural gas projects is evident across successive TYNDP cycles, despite the total number of projects remaining relatively stable. The decrease may be explained by the following reasons:

- ▲ The application of the GPI that sets clear administrative and technical criteria to be matched by promoters and projects in order to be considered eligible for inclusion in the TYNDP;
- ▲ The implementation of the revised TEN-E Regulation that prevents natural gas projects to be eligible for PCI/PMI status, and therefore, reduces the overall number of projects of European relevance submitted to TYNDP process.
- ▲ Development and inclusion of hydrogen become more and more important;
- ▲ Completed projects have in the meantime further contributed to the reduction of the infrastructure gaps (45 NG projects were completed between TYNDP 2022, 2024 and 2026);
- ▲ Recent development on the natural gas market, caused by the war in Ukraine and middle east leading to some demand destruction.

7.4.1 OVERVIEW PER TYPE AND STATUS

From the total of 347 projects included in TYNDP 2026, 77 natural gas projects have been submitted for the subcategories TRA, LNG and UGS (22 %).

The following figures and tables provide a statistical overview of promoters’ submissions (see TYNDP 2026 Annex A for further details) based on information such as the type of infrastructure or the FID status or PCI or PMI status. The Annex A reflects all the details entered by project promoters during the data collection process.

Figure 34 shows a summary of TYNDP 2026 natural gas projects by project maturity status.

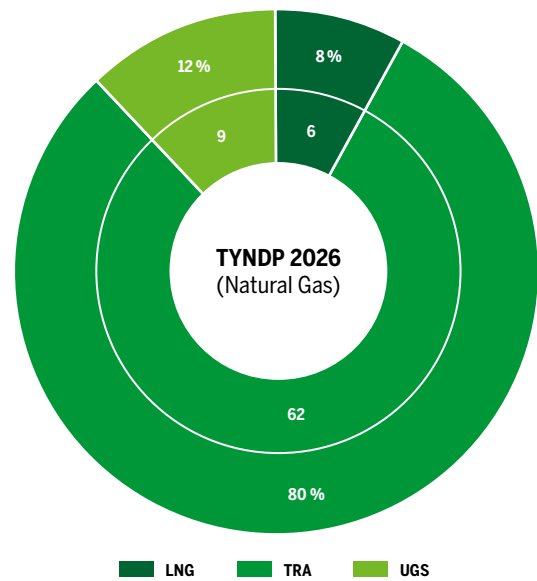


Figure 34: Natural gas projects in TYNDP 2026 by subcategory – LNG, TRA, UGS. The inner circle represents absolute numbers of projects; the outer circle represents the share of each subcategory.

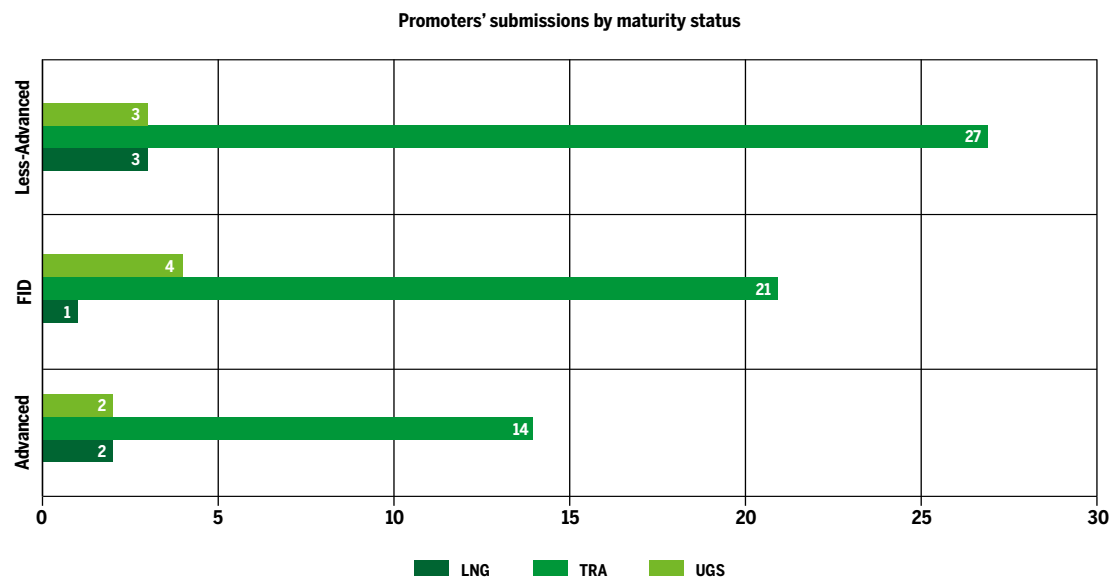


Figure 35: Promoters’ submissions for natural gas by maturity status.

13 new natural gas projects were submitted: 11 TRA and two LNG.

Table 4 provides a status update for the natural gas projects in TYNDP 2026.

Status	LNG	TRA	UGS	Grand Total
Cancelled	–	5	–	5
Completed	5	13	1	19
In Progress	–	17	4	21
Not resubmitted	3	4	1	8
Planned	4	33	5	42
Grand Total	12	72	11	95

Table 4: Number of projects for natural gas from TYNDP 2024 in TYNDP 2026 – completed, planned, in progress, not resubmitted and cancelled.

Regarding transmission projects, an overall reduction of number of investments can be seen: 13 have been completed since TYNDP 2024, while nine TRA projects have been cancelled or not resubmitted.

Considering LNG projects, five LNG terminals has been commissioned since TYNDP 2024 while three projects were not resubmitted or cancelled. Finally, four LNG projects are planned.

One UGS project was completed between TYNDP 2024 and TYNDP 2026, while one was not resubmitted. Finally, five UGS projects are planned and four are in progress.

The following table provides an overview of all cancelled and not resubmitted projects.

It should be noted that projects not resubmitted are not necessarily cancelled. They may instead be on hold or already completed. This is the case, for example, for project LNG-F-880.

Project code	Project name	Status
TRA-A-1322	Development on the Romanian territory of the NTS (BG–RO–HU–AT)-Phase II	Cancelled
LNG-N-227	Fos Cavaou LNG Terminal Expansion	Not resubmitted
TRA-N-269	Developments for Fosmax (Cavaou) LNG 8.25 bcm expansion	Not resubmitted
LNG-N-225	Montoir LNG Terminal Expansion	Not resubmitted
TRA-N-258	Developments for Montoir LNG terminal 2.5 bcm expansion	Not resubmitted
UGS-N-356	Underground Gas Storage Velke Kapusany	Not resubmitted
TRA-A-655	Eastring – Romania	Not resubmitted
LNG-F-880¹²	Gate 4 th tank, 4 bcma expansion	Not resubmitted
TRA-A-429	Adaptation L- gas – H-gas	Not resubmitted
TRA-A-1317	Connection FSRU Alto Tirreno	Cancelled
TRA-N-959	Further enlargement of the BG–RO–HU–AT transmission corridor (BRUA) phase 3	Cancelled
TRA-N-1299	Export enhancements phase 2	Cancelled
TRA-N-1313	Transferring L-gas infrastructure to H2-gas infrastructure OSZ	Cancelled

Table 5: Cancelled and not resubmitted natural gas projects between TYNDP 2024 and 2026

¹² Project LNG-F-880 have already obtained the FID status and is set to be completed by the end of 2026. The additional firm technical capacity at 1-10-2026 can be seen at ENTSG's [transparency platform](#).

For a better analysis, a comparison at the maturity level between the TYNDP 2024 and the TYNDP 2026 submission is presented in the following graph.

From **Figure 36** we can see that in TYNDP 2026, the majority of TRA, LNG and UGS projects have the Less-Advanced status, followed by projects with FID and the Advanced status. A similar pattern was observed in TYNDP 2024.

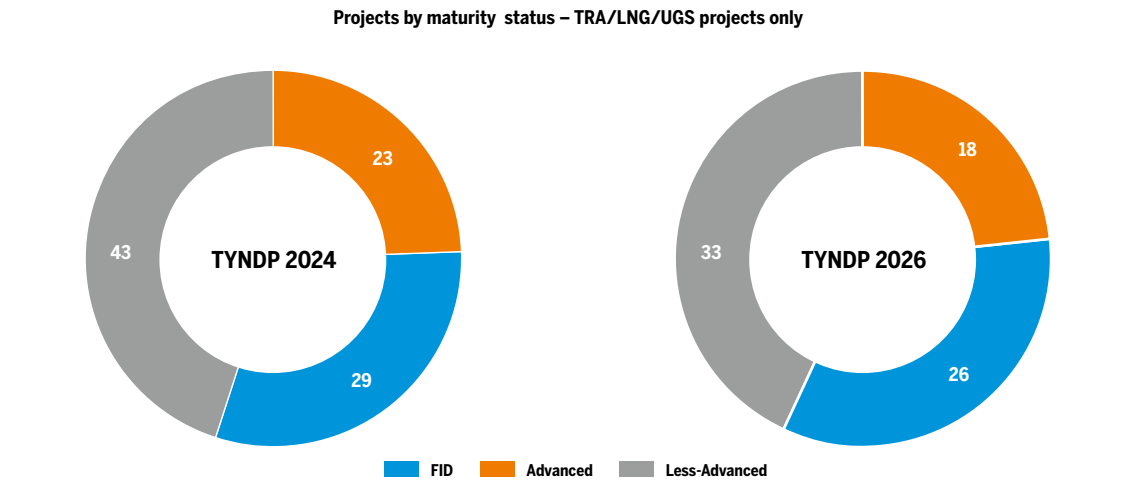


Figure 36: Comparison of natural gas submissions in TYNDP 2024 and TYNDP 2026 per maturity status.

7.4.2 OVERVIEW OF PROMOTERS' INVESTMENTS PER GEOGRAPHICAL LOCATION

The following charts provide a summary of promoters' submissions based on their geographical location, infrastructure type and maturity status for investments in the area of natural gas categories.

The total number of natural gas submissions for TYNDP 2026 concerns 16 countries of the European Union and one (Ukraine) which is part of the Energy Community¹³ as contracting party.

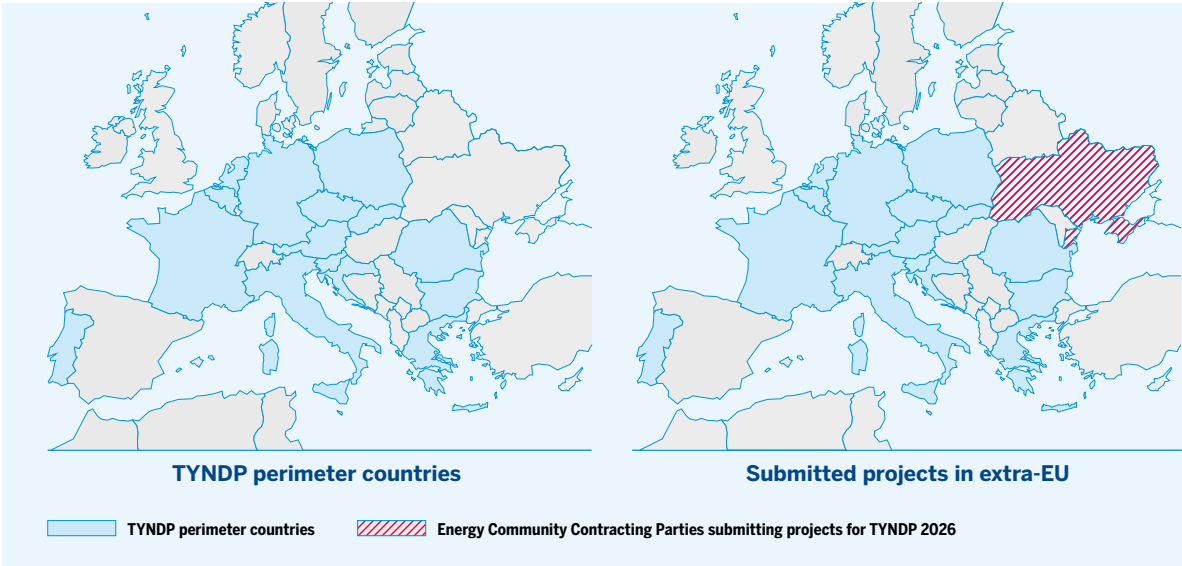


Figure 37: TYNDP perimeter countries and countries outside European Union for which Natural gas projects were submitted in TYNDP 2026

13 The [Energy Community](#) is an international organisation which brings together the European Union and its neighbours to create an integrated pan-European energy market.

Figure 38 and **Figure 39** provide an overview of the natural gas projects per country and per maturity status.

The highest number of natural gas projects were submitted for Romania (14), followed by Italy (13).

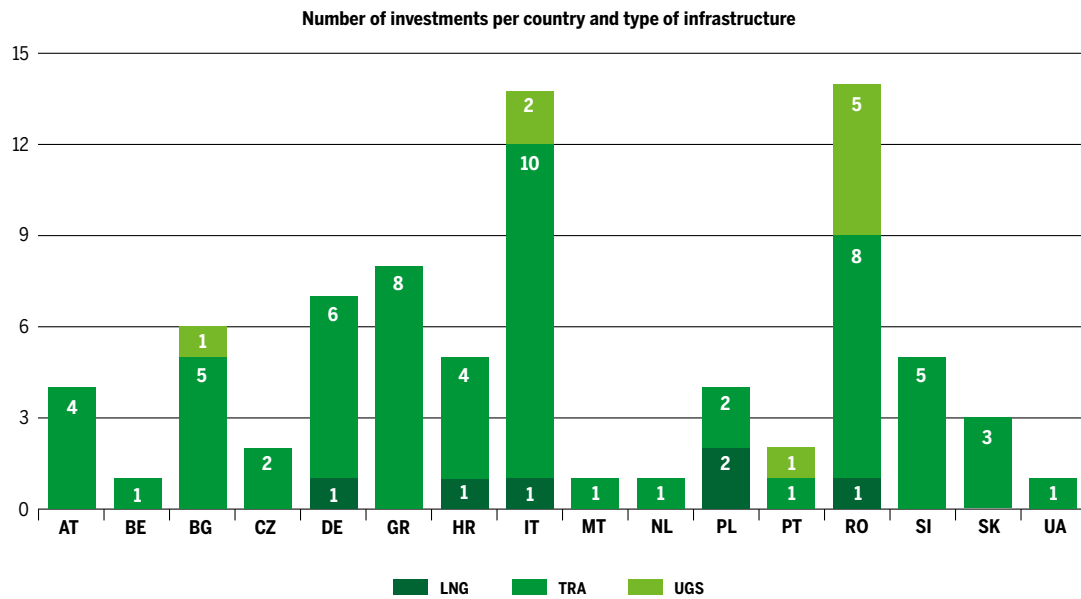


Figure 38: Number of natural gas projects and subcategory per country.

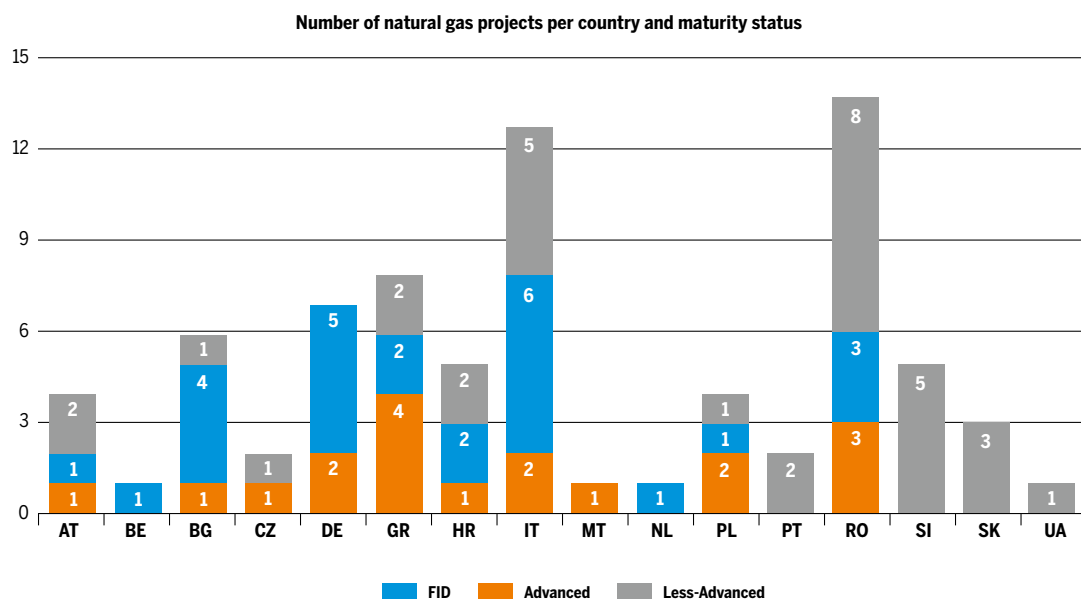


Figure 39: Number of natural gas projects and maturity status per country.

The variations of submissions per country is caused by the fact that some TSOs are required to ensure some consistency between projects included in the National Development Plans and projects included in the ENTSG TYNDP while in other countries only projects with cross-border significance should be submitted.

Natural gas infrastructure projects – many of which have already reached FID or are at an advanced stage of development – are expected to continue playing a strategic role during the energy transition. Their relevance today is driven by several factors, including:

- ▲ The need to safeguard security of supply following the long-term disruption and gradual phase-out of Russian gas imports into Europe, as well as increased geopolitical uncertainty in global energy markets.
- ▲ The need to support decarbonisation efforts by enabling the replacement of more carbon-intensive fuels, particularly coal and oil, while maintaining system reliability during the transition.

- ▲ The need to provide flexibility and resilience to electricity systems facing transmission constraints, including through the integration of flexible gas-fired generation and backup capacity in regions with grid bottlenecks.
- ▲ The need to balance the growing share of variable renewable energy sources, such as wind and solar, by providing dispatchable capacity and seasonal flexibility.
- ▲ The need to diversify supply sources and routes, including LNG infrastructure and interconnections, to strengthen regional energy security and market integration.

In this context, as showed in **Figure 39** a significant number of natural gas projects are currently being developed to address such needs in Italy, Germany, Greece, Bulgaria and Romania.



7.4.3 ANALYSIS OF PROJECT SCHEDULE

Figure 40 and Figure 41 show the distribution of projects included in TYNDP according to the expected (first) commissioning year in an aggregated way. The majority of projects falling under the natural gas category will be commissioned within

the next four years (62 out of 77 or 80 %), while the last commissioning year is 2035. All of the projects having FID or Advanced status are expected to be commissioned until 2030.

In addition, several years are not displayed in the following graphs, indicating that there are no projects to be commissioned during these years.

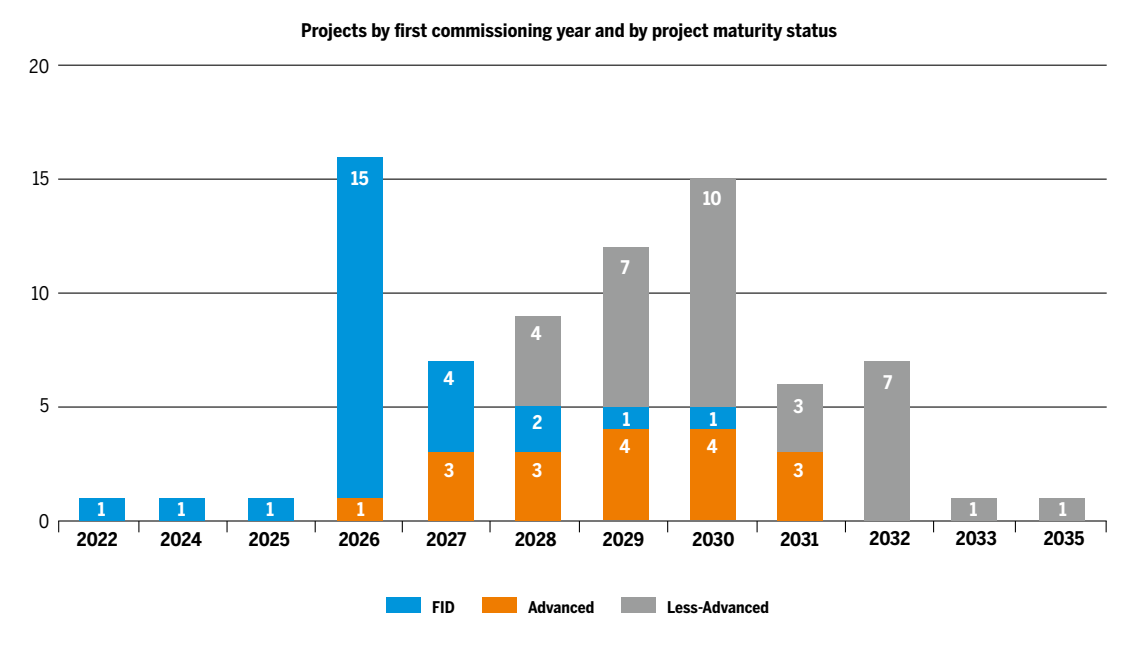


Figure 40: Natural gas projects by commissioning year and by project maturity status – TRA, UGS and LNG.

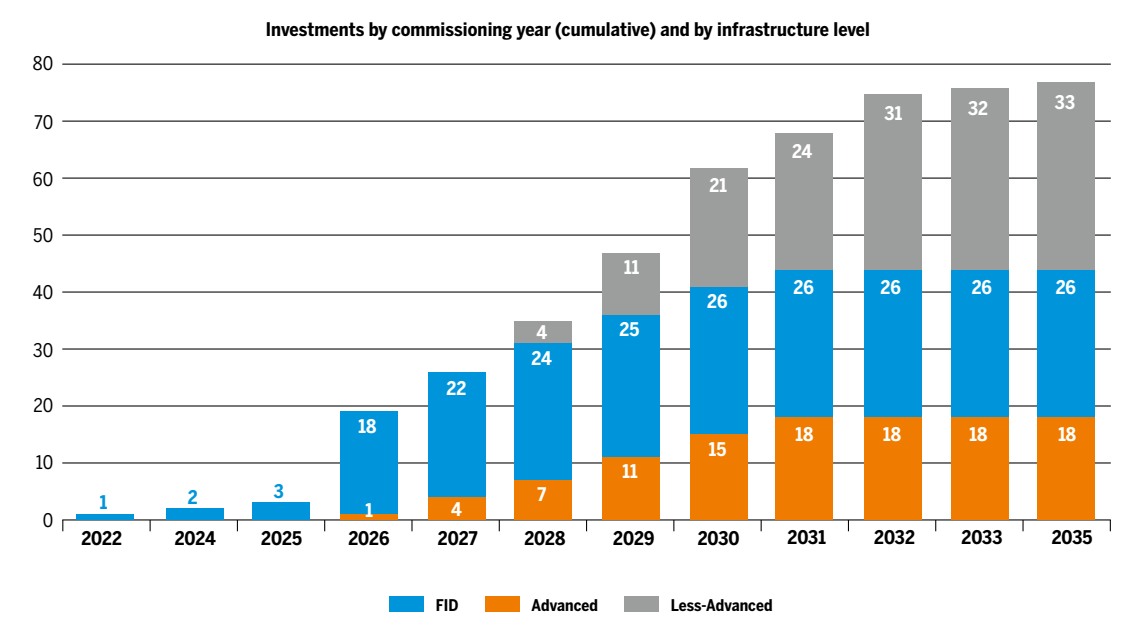


Figure 41: Natural gas projects by commissioning year (cumulative) and by project maturity status – TRA, UGS and LNG.

As part of the project collection, promoters must provide information (except for some specific situations) about the projects' schedules of the main project phases and milestones (i.e., Feasibility study, FEED, Permitting, FID, Construction and Commissioning).

In case of the **Feasibility Study phase**, the start and end dates, either past or expected, have been provided for 62 projects. The average duration of the Feasibility Study phase for these projects is 28 months. In addition, the majority of the projects (53) have indicated the completion of the feasibility study until the end of TYNDP 2026 project collection period. One project has started the feasibility study before the end of the project collection period but expect to complete it within 2026. The remaining eight projects are expected to start their feasibility study during 2027 with the latest end January 2027.

Regarding the **FEED phase**, the start and end dates, either past or expected, have been provided for 73 projects. The average duration of the FEED phase for natural gas projects is 33.5 months. 38 projects have indicated to complete the FEED phase until the end of TYNDP 2026 project collection period. In addition, 10 projects have started FEED phase before the end of the project collection period but are still ongoing with the latest finalisation date in September 2029.

The remaining 25 projects did not start the FEED phase by the end of the TYNDP 2026 project collection phase.

In case of the **Permitting phase**, the start and end dates, either past or expected, have been provided for 73 projects. The average duration of the Permitting phase for these projects is 43 months. More specifically, 20 projects have completed the permitting phase until the end of TYNDP 2026 project collection period. 23 projects have started permitting phase before the end of the project collection period but are still ongoing with the latest finalisation date in May 2030. The remaining 30 projects have not started the permitting phase by the end of 2033.

The **FID date**, either past or expected, has been provided for 72 natural gas projects. 30 projects have obtained or are about to obtain the FID until the end of the project collection phase. The average FID date is 27 January 2026.

Regarding the **Construction phase**, the start and end dates, either past or expected, have been provided for 76 projects. The average duration of the Construction phase for these projects is 42 months. 21 projects have started their construction prior to the end of the project collection period. The remaining 68 projects have foreseen the start of the construction after the end of 2025 with latest end date in December 2037.

Figure 42 below provides all the information for the different phases described above.

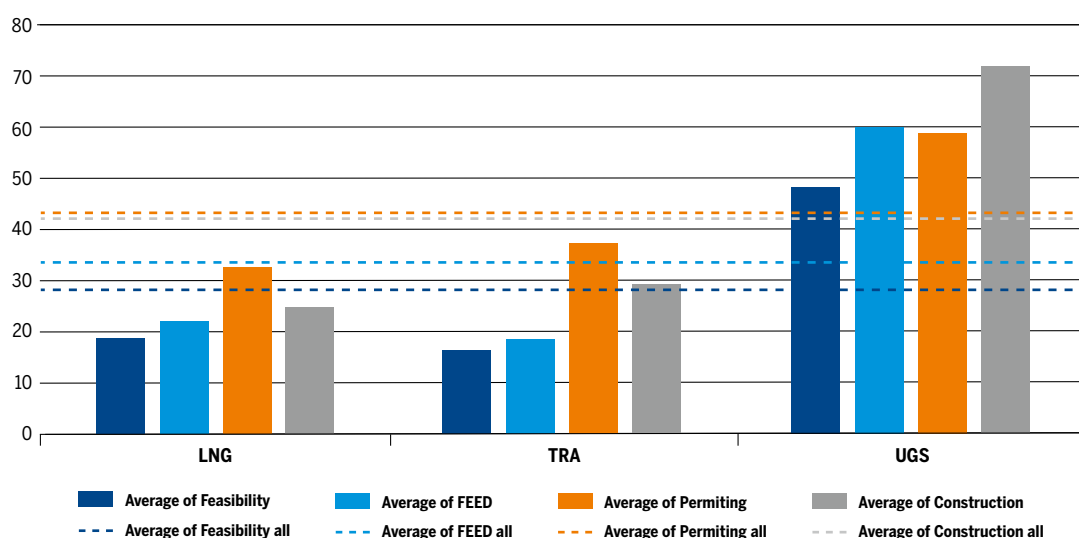


Figure 42: Average duration of Feasibility, FEED, Permitting and Construction phases for TRA, UGS and LNG.

The **Commissioning year** has been provided for all natural gas projects in TYNDP 2026. The average Commissioning year for these projects is

2029 with 66 natural gas projects expected to be commissioned by the end of 2031 and the remaining 11 until 2037.

Status	Completed in TYNDP 2026	FID in TYNDP 2026	Advanced in TYNDP 2026	Less Advanced in TYNDP 2026	Cancelled/Not resubmitted to TYNDP 2026	Total
FID (TYNDP 2024)	17	11	–	–	1	29
Advanced (TYNDP 2024)	1	9	6	3	4	23
Less-Advanced (TYNDP 2024)	1	2	6	25	9	43
Total	19	22	12	28	14	95

Table 6: Evolution of projects from TYNDP 2024 to TYNDP 2026 (natural gas category)

For natural gas projects not having gotten the FID yet and are classified as Advanced (18 projects) the analysis shows:

- 17 projects provided the foreseen FID date from which, all of them expected to be commissioned until 2031.
- An average of almost two years between the year when the construction works are expected to start and when the project is expected to be commissioned.

For projects not having gotten the FID yet and are classified as Less-Advanced (33 projects), while taking into account that such information may not be always reliable with regards to Less-Advanced projects, the analysis shows:

- For 29 “Less-Advanced” natural gas projects the FID date was provided. The average FID date is 03/05/2028 and the latest is December 2033.

- 17 are expected to be commissioned within two years from when the FID is expected to be taken, while for the rest of the submissions it is within three to five years;

The way FID is taken by each promoter may differ. Some may take FID after the granting of permits and some before initiating the permitting procedure. Those permitting procedures often represent the longest phase of the whole project schedule which often lasts more than five years.

Figure 43 and **Figure 44** illustrate the status of those common projects according to TYNDP 2024 and TYNDP 2026 submissions. The charts show the share of those projects for which a delay has been reported regarding their expected commissioning date and the length of this delay.

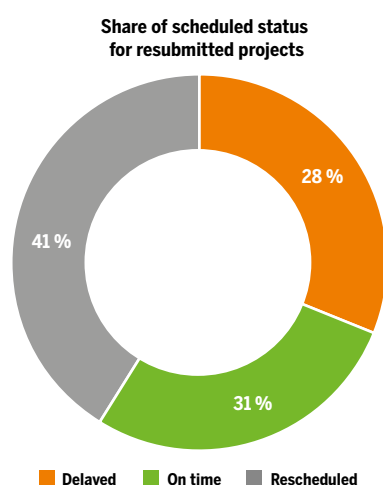


Figure 43: Share per scheduled status for resubmitted natural gas projects.

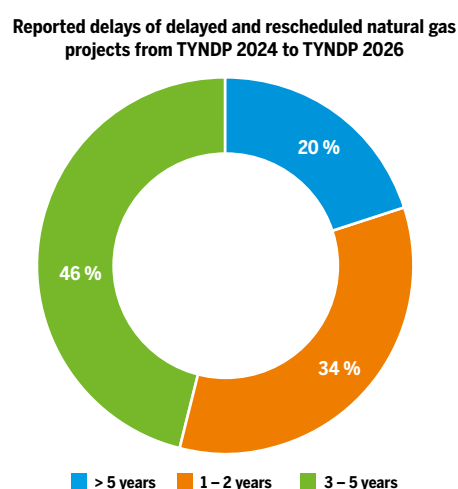


Figure 44: Reported delays from TYNDP 2024 to TYNDP 2026 for natural gas projects.

No natural gas projects have been submitted with an earlier commissioning date.

Delay or rescheduling reason was provided for 54 natural gas projects. Among the main reasons indicated by promoters are:

- ▲ Permitting and regulatory delays: **8 projects**
- ▲ Project scope and schedule reassessment: **17 projects**
- ▲ Project interdependencies: **13 projects**
- ▲ Financial and funding issues: **13 projects**
- ▲ Geopolitical impact: **3 projects**

7.4.4 INVESTMENT COSTS

As mentioned in Chapter 6.4.4, investment costs might be commercially sensitive information and in some cases have the potential to negatively affect the competitive position of project promoters vis-à-vis contractors.

As part of the transparency process adopted, ENTSG has collected information from promoters on indicative investment costs for all submitted projects.

60 out of 77 submissions declared their costs as non-confidential. The total capital expenditure for all the three natural gas subcategories was

more than 33 billion euros in TYNDP 2026, while in TYNDP 2024 was around 36 billion euros. As shown in **Figure 45**, TRA projects (80 % of the total number of natural gas projects) cover the majority of the investment costs for the respective category (76 %). In addition, almost half of the total costs for natural gas investments will take place until 2029 (58 %) (see **Figure 47**).

The highest share of costs is represented in the advanced status (around 44 %) while the share of advanced project for all the natural gas projects is around 43 % (see **Figure 45**).

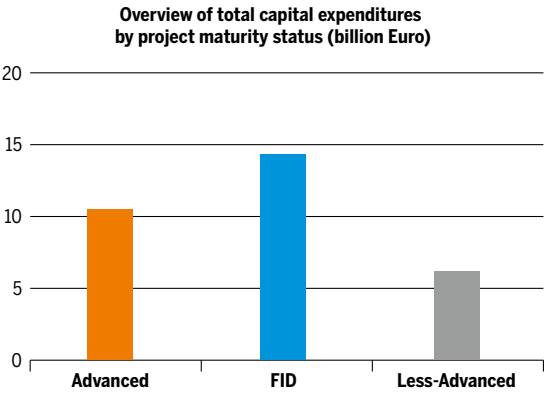


Figure 45: Overview of total capital expenditure by project maturity status – TRA, UGS and LNG

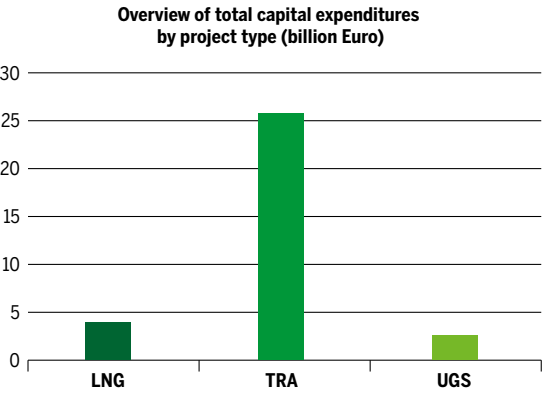


Figure 46: Overview of total capital expenditure by subcategory – LNG, TRA and UGS.



In addition, several years are not displayed in the graph, indicating that no cost values were recorded for those periods.

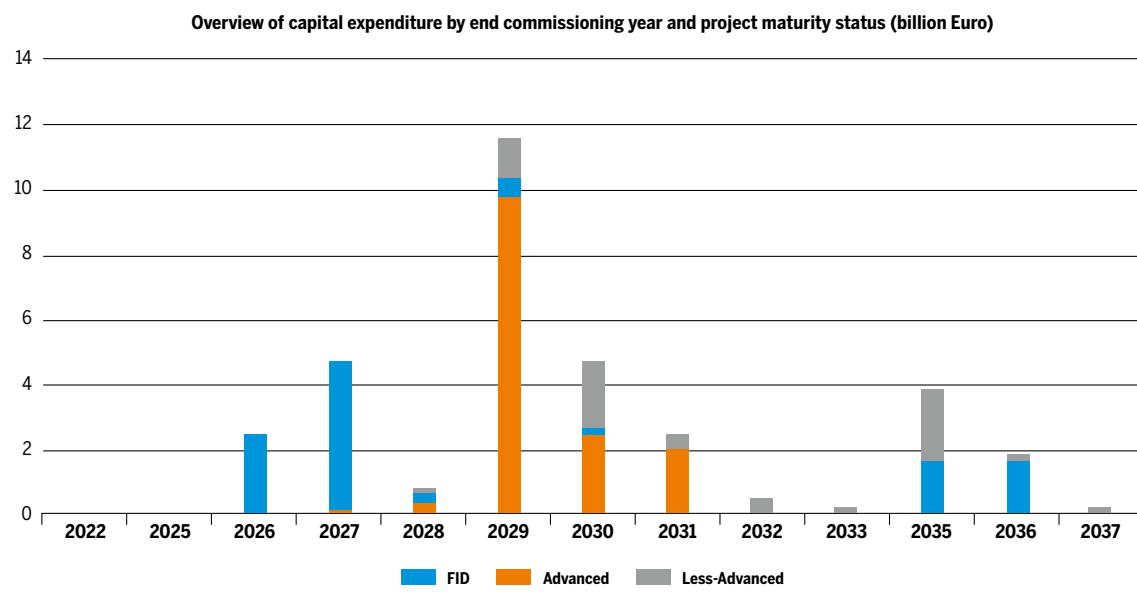


Figure 47: Overview of total capital expenditure by last commissioning year and project maturity status for LNG, TRA and UGS.

7.4.5 TYNDP 2026 SUBMISSIONS AND NATIONAL DEVELOPMENT PLANS

Following the legal framework mentioned in section 6.4.5 and ACERs' recommendations, ENTSOG requested project promoters to always indicate if their initiatives are part of the NDP. If not, the project promoters had to indicate the reason for its project not being part of the NDP.

Out of the total number of projects that were listed under the natural gas subcategories, 67 (87 %) were included in the NDP. The subcategory with the highest number of included projects was TRA (54 out of 62), followed by UGS (8 out of 9) and LNG (5 out of 6).

Table 7 below presents the number of projects per country that are included or not in the respective NDP.

Country	Part of NDP	NOT Part of NDP	Country	Part of NDP	NOT Part of NDP
AT	1	3	IT	13	–
BE	1	–	LT	–	–
BG	5	1	LU	–	–
BIH	–	–	LV	–	–
CH	–	–	MT	1	–
CY	–	–	NA	–	–
CZ	2	–	NL	1	–
DE	7	–	NO	–	–
DK	–	–	PL	2	2
EE	–	–	PT	2	–
ES	–	–	RO	13	1
FI	–	–	SE	–	–
FR	–	–	SI	5	–
GR	6	2	SK	3	–
HR	5	–	UA	–	1
HU	–	–	UK	–	–
IE	–	–			

Table 7: Overview of projects being part or not of NDPs by country (LNG, TRA and UGS).

For 10 projects reported as not part of any NDP, promoters have indicated the following reasons:

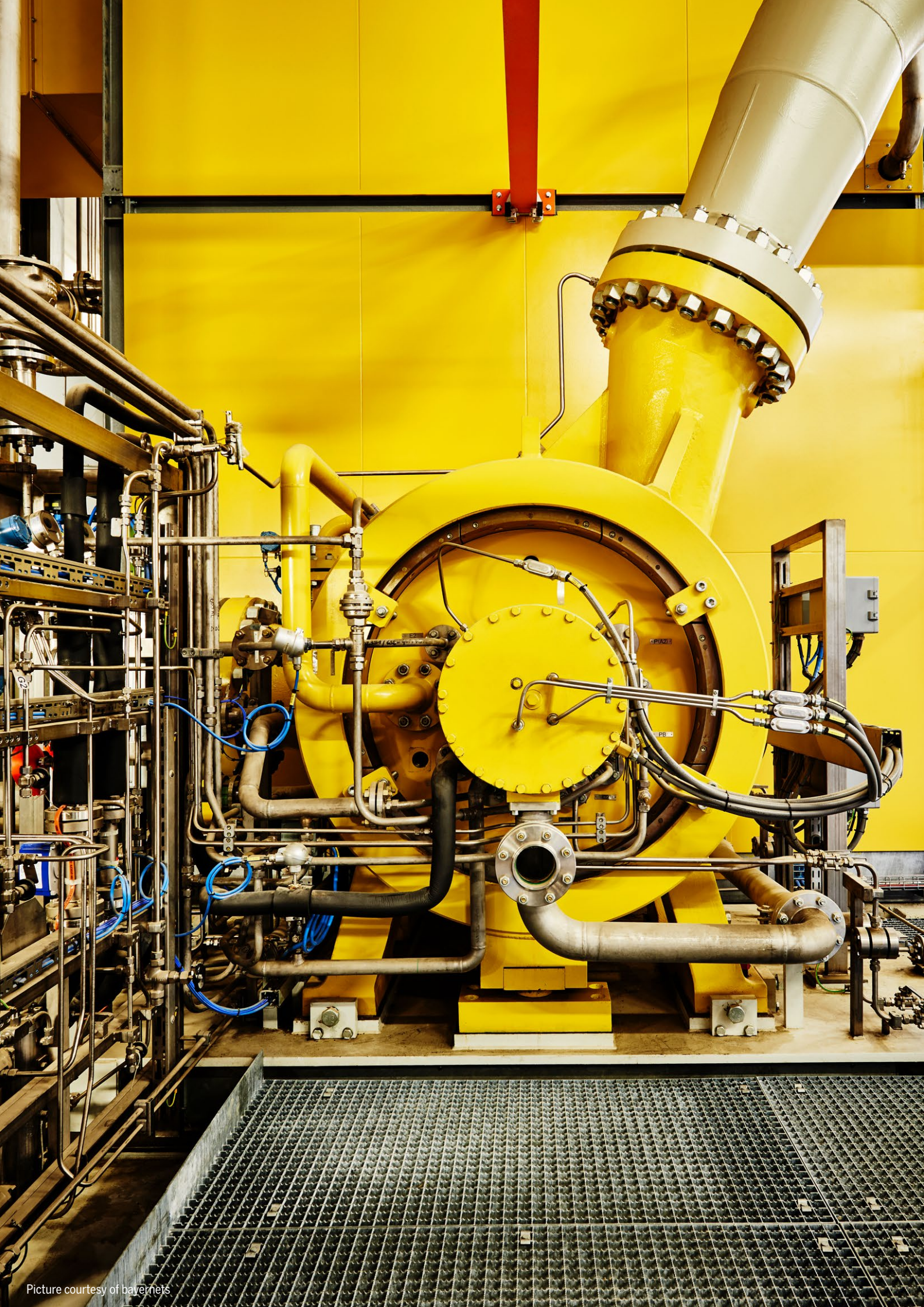
- ▲ Project is exempted from the network development obligations of Article 22 Gas Directive 2009/73/EC and hence from the obligation to be included in the NDPs.
- ▲ The NDP is still subject to approval by the NRA at the time of TYNDP 2026 data collection.

For further details, please refer to TYNDP 2026 Annex A.

7.5 TYNDP 2026 NATURAL GAS PROJECTS BEING PART OF THE 2nd UNION LIST UNDER THE TEN-E REGULATION

Although, as a general rule, natural gas projects are ineligible for PCI and PMI status (see section 6.5), the EastMed Pipeline (TRA-A-330) retained its PCI status as a unique exception, alongside the project connecting Malta to the European gas network (TRA-N-31).

This exception was granted due to geographical constraints and the fact that these countries lack connections to the trans-European gas network. It is important to note that this exemption is temporary and subject to stringent conditions to align with the European Union's broader energy and climate policy objectives.



8 PROMOTERS' SUBMISSIONS FOR SMART GAS GRID AND OTHER PROJECTS TO TYNDP 2026

The Energy Transition projects were first included in TYNDP 2020, while in TYNDP 2024 there was a further division replacing the ETR projects into hydrogen, smart gas grid and others. This division is kept in TYNDP 2026 as well.

In order to present more precise information in these evolving subcategories, ENTSOG provides a separate analysis of these subcategories in this chapter. This analysis includes only BIO, CO₂, OTH, RET and SYN investments.

26 projects have been included in TYNDP 2026 and fall under the five mentioned subcategories.

It should be noted that, as for electrolyser projects (see section 6.5), the TEN-E Regulation does not require CO₂ and smart gas grid projects to be part of the TYNDP in order to be eligible for PCI or PMI status.

8.1 SMART GAS GRID PROJECTS

For TYNDP 2026, promoters submitted 10 smart gas grid projects. More specifically, four BIO, one SYN and five RET projects. Only one new project was submitted to this subcategory compared to TYNDP 2024 (BIO-N-1378).

▲ **One BIO** project enabling the reverse transportation between DSO and TSO of biomethane and **three** network development projects enabling biomethane production/injection into the gas grid;

▲ **Four RET** projects regarding Retrofitting of existing gas pipelines and other network related assets for (bio-)methane-hydrogen blending and **one** investment regarding retrofitting of existing storages for H₂ blending.

8.2 OTHER PROJECTS

For TYNDP 2026, promoters submitted 16 projects in the Others category. More specifically, 9 OTH investments and seven CO₂ investments. Among these projects, there are two new submissions under the CO₂ subcategory and four new submissions for OTH. More specifically:

▲ **Six OTH** and **six CO₂** dedicated projects enabling the production, reception, injection, transportation or end-use supply of carbon dioxide. Two OTH projects to reduce methane emissions in existing infrastructure and one CO₂ project dedicated to the conversion of natural gas storage for CO₂ transport or storage.

MAP FOR OTHER INFRASTRUCTURE PROJECTS IN TYNDP 2026

BIOMETHANE DEVELOPMENT PROJECTS					
❗	BIO-N-547	Biomethane : Reverse flow Projects	TEREQA	REVERSE	Less-Adv. Non-PCI
	BIO-N-728	Biomethane: connection of production units	TEREQA	PROD-INJ	Less-Adv. Non-PCI
❗	BIO-N-1265	Biomethane productions interconnection	snath	PROD-INJ	Less-Adv. Non-PCI
★	BIO-N-1378	Monforte Biomethane Discharge Station	REN Gasodutos	PROD-INJ	Less-Adv. Non-PCI
SYNTHETIC METHANE PROJECTS					
	SYN-F-305	PEGASUS	G	SYN FID	Non-PCI
CO2 TRANSPORT AND/OR STORAGE					
❗	CO2-F-1269	Belgian CO2 Transmission Facilities	fluxys	CO2 FID	PCI
	CO2-A-1157	Italian CO2 Network	Eni	CO2 Advanced	Non-PCI
	CO2-N-456	SAVA aquifer CO2 transmission cluster	plunagro	CO2 Less-Adv.	Non-PCI
	CO2-N-551	DRAVA aquifer CO2 transmission cluster	plunagro	CO2 Less-Adv.	Non-PCI
	CO2-N-554	OSIJEK aquifer CO2 transmission cluster	plunagro	CO2 Less-Adv.	Non-PCI
★	CO2-N-1218	NWC02-transport pipeline	NOVO	CO2 Less-Adv.	Non-PCI
★	CO2-N-1223	CCS - depleted fields conversion in Slovakia	nafta Joint Stock Company	CO2 Less-Adv.	Non-PCI
OTHER INFRASTRUCTURE RELATED PROJECTS					
❗	OTH-A-743	Impulse 2025	TEREQA	OTH Advanced	Non-PCI
❗	OTH-A-1201	Reduction of transmission system methane emissions	Plinorodi	OTH Advanced	Non-PCI
	OTH-A-1242	Modernisation of compressor units	nafta Joint Stock Company	OTH Advanced	Non-PCI
	OTH-N-322	North Sea Wind Power Hub	ENERGINET tennet gasunie	OTH Less-Adv.	PCI
	OTH-N-984	Pycasso	TEREQA	OTH Less-Adv.	PCI
★	OTH-N-679	Hub C0net2 Norte	Scale Green Energy enagas	OTH Less-Adv.	Non-PCI
★	OTH-N-869	Hub C0net2 Cataluña	Scale Green Energy enagas	OTH Less-Adv.	Non-PCI
★	OTH-N-870	Hub C0net2 Levante	Scale Green Energy enagas	OTH Less-Adv.	Non-PCI
★	OTH-N-871	Hub C0net2 Atlántico	Scale Green Energy enagas	OTH Less-Adv.	Non-PCI
	OTH-N-920	Measures for the reduction of methane emissions	eustream	OTH Less-Adv.	Non-PCI
RETROFITTING INFRASTRUCTURE FOR HYDROGEN (RET)					
Retrofitting : infrastructure upgrades to allow hydrogen blends					
	RET-N-558	Smartening up existing BG gas transm. network (SmartSwitch)	BULGARTRANSNAZ	Less-Adv.	Non-PCI
	RET-N-661	Adjustment of existing eus pipeline SK-HU	eustream	Less-Adv.	Non-PCI
	RET-N-973	Smartening up existing GR gas transm. network (SmartSwitch)	Enagas	Less-Adv.	Non-PCI
❗	RET-N-1049	H2RENGRID - Transport Network	REN Gasodutos	Less-Adv.	Non-PCI
	RET-N-1050	H2RENGRID - Carriço UGS	REN Gasodutos	Less-Adv.	Non-PCI

Figure 48: Map for other infrastructure projects in TYNDP 2026

KEYS

Cross border points / intra balancing zone points

- Cross border intersection point within Europe
- Cross border intersection point within Europe to non-EU country
- Cross border intersection point within Europe
- Cross border intersection point with third country (planned)
- LNG Import terminal (operational)
- LNG Export terminal (operational)
- Third country cross border intersection point
- Gas field
- Chilling platform
- EU Countries
- Other Countries
- Location (city)
- Country capital

ENTSO-E currently comprises 43 TSO members, 1 Associated Partner and 9 Observers from 32 European Countries

When the same point is affected by several projects, the point is shown with the highest project status: operational, FID, advanced, non-FID, less advanced, the status from single project convey from that.

The projects are shown with the planning status reported in their TNDP 2024 submission.

All data provided on this map is for information purposes and shall be treated as indicative and non-contractual information without pre-empting different outcomes of any possible discussion held at regional level. Under no circumstance shall it be regarded as information intended for commercial use.

Version: June 2024
WGS 84 / Pseudo Mercator projection

Project status:

Project ENTSOG code: **ENTSO-E** (Project of Common Interest)
Project ENTSOG code: **ENTSO-E** (Project of Common Interest)
Project ENTSOG code: **ENTSO-E** (Project of Common Interest)
Project ENTSOG code: **ENTSO-E** (Project of Common Interest)

Project status codes:

The project advancement status is based on the TNDP project collection conducted from 2019/2020 to 14/12/2023.

Advanced status: Applied to all projects that, based on the information submitted, have:

- Commissioning expected at the latest by 31 December of the year of the TNDP project data collection + 4 (e.g. 2023 in case of TNDP 2020, for which projects are collected in 2020)
- AND the project fulfils at least one of the following criteria:

- Reengineering has been completed of the TNDP project data collection
- FEED has been completed ahead of the TNDP project data collection

Other infrastructure projects:

- Gas transmission pipeline
- Reception, storage and regasification or decompression facilities for liquefied natural gas (LNG) or compressed natural gas (CNG)
- Underground storage facilities
- Projects for retrofitting infrastructure to further integrate hydrogen
- Biomethane development projects
- Synthetic methane projects
- Repurposing of natural gas infrastructure for CO₂ transport and/or storage
- Other infrastructure related projects

Transport by pipeline

Existing infrastructure for natural gas

- Diameter < 600 mm
- Diameter 600 - 800 mm
- Diameter > 800 mm
- Not operational

Retrofitting for hydrogen

Receiving infrastructure capacity to allow hydrogen blend

- FID projects
- Non-FID advanced projects
- Non-FID less advanced projects
- Non-FID less advanced projects

CO₂ transport

- FID projects
- Non-FID advanced projects
- Non-FID less advanced projects
- Non-FID less advanced projects

Project identification:

- ENTSO-E project code
- ENTSO-E project code
- ENTSO-E project code
- ENTSO-E project code

Biomethane projects

- FID projects
- Non-FID advanced projects
- Non-FID less advanced projects
- Non-FID less advanced projects

Other infrastructure projects

- FID projects
- Non-FID advanced projects
- Non-FID less advanced projects
- Non-FID less advanced projects

Project identification:

- ENTSO-E project code
- ENTSO-E project code
- ENTSO-E project code
- ENTSO-E project code

DOWNLOAD FULL MAP

8.3 FURTHER DETAILS ON THE TYNDP 2026 PROMOTERS' SUBMISSIONS FOR RET, BIO, SYN, CO₂ AND OTH PROJECTS

Following the same structure as Chapters 6 and 7, this section provides more details on the investments under category BIO, CO₂, OTH, RET and SYN submitted to TYNDP 2026.

26 projects were submitted in total under these subcategories. The following graph presents the comparison of OTH and smart Gas Grid and Total Projects in TYNDP Cycles. TYNDP 2020 numbers are not presented, since OTH and Smart Gas Grid projects were part of the ETR category.

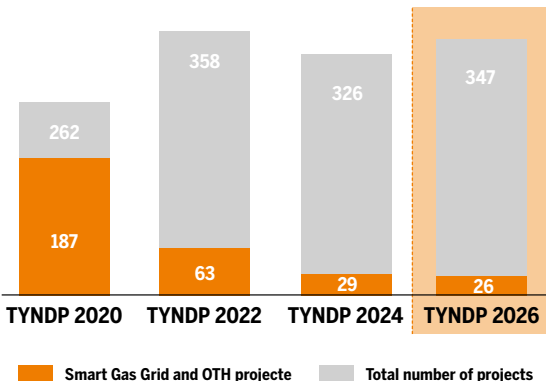


Figure 49: Evolution of OTH and Smart Gas Grid Projects vs Total Projects in TYNDP (2022–2024–2026)

8.3.1 OVERVIEW PER STATUS

From the total of 347 projects included in TYNDP 2026, 26 Smart gas grid and Other projects have been submitted for the subcategories BIO, CO₂, OTH, RET and SYN (7 %). These subcategories constituted 9 % of the total number of submitted projects in TYNDP 2024 and 17 % of the total number of submitted projects in TYNDP 2022.

The following figures and tables provide a statistical overview of promoters' submissions (see TYNDP 2026 Annex A for further details) based on information such as the type of infrastructure or the FID/PCI status. Those reports reflect all the details entered as part of the data collection process by project promoters.

Figure 50 below presents an overview of all the projects accepted for inclusion in TYNDP 2026 per type of infrastructure for subcategories BIO, CO₂, OTH, RET and SYN.

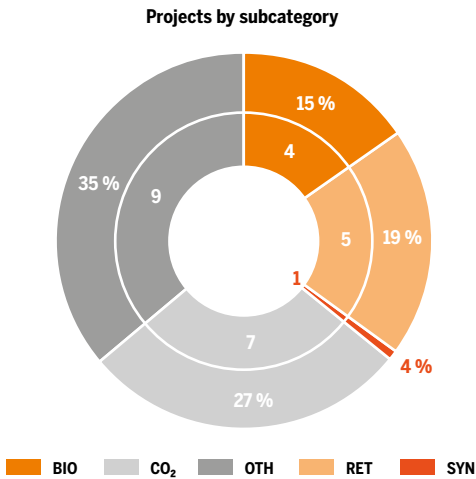


Figure 50: Project inclusion in TYNDP 2026 per subcategory. The inner circle represents absolute numbers of investments; the outer circle represents the share of each subcategory.

Figure 51 shows the submissions sorted by the maturity status. Most projects are Less-Advanced (77 %), four projects have the Advanced status, while only two out of the 29 projects acquired the FID status.

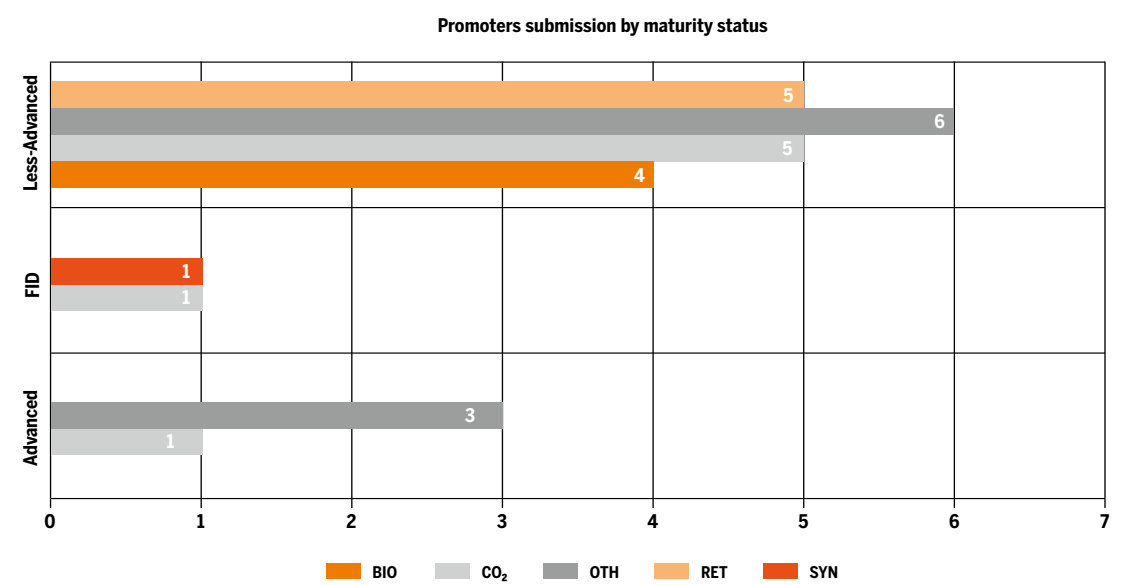


Figure 51: Projects by maturity status – BIO, CO₂, OTH, RET and SYN.

In TYNDP 2024, out of 29 projects, 21 or 69 % were Less-Advanced, six projects were Advanced and three had taken FID. Only one project (OTH-F-1254 CS Elten) was completed between TYNDP 2024 and TYNDP 2026.

Table 8 provides a status update for the OTH and Smart Gas Grid projects in TYNDP 2026.

Status	BIO	OTH	RET	CO ₂	SYN	Grand Total
Cancelled	–	–	–	–	–	–
Completed	–	1	–	–	–	1
In Progress	2	2	2	1	–	7
Not resubmitted	2	5	2	–	–	9
Planned	1	4	3	3	1	12
Grand Total	5	12	7	4	1	29

Table 8: Status update for BIO, CO₂, OTH, RET and SYN from TYNDP 2024 in TYNDP 2026.

More details on the maturity status for these subcategories can be found in (Chapter 4).

8.3.2 OVERVIEW OF PROMOTERS' INVESTMENTS PER GEOGRAPHICAL LOCATION

The following charts provide an overview of promoters' submissions based on their geographical location, (sub)category and maturity status for the five subcategories RET, BIO, SYN, CO₂ and OTH.

In TYNDP 2026, 11 countries (IT, BE, BG, DE, ES, FR, HR, GR, PT, SI, SK) submitted in total 26 projects concerning smart gas grid and other categories.

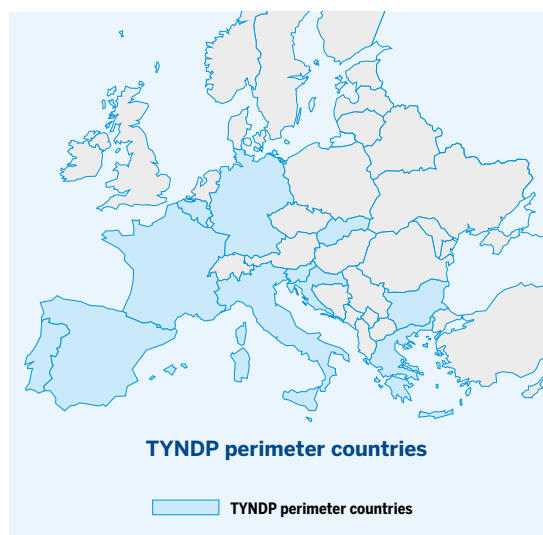


Figure 52: TYNDP perimeter countries for which BIO, CO₂, OTH, RET and SYN projects were submitted in TYNDP 2026.



Figure 53 presents the number of projects per country for the five subcategories. France, Spain and Slovakia are the countries with the highest number of projects (eight each). In **Figure 54** the five subcategories are sorted by their maturity status.

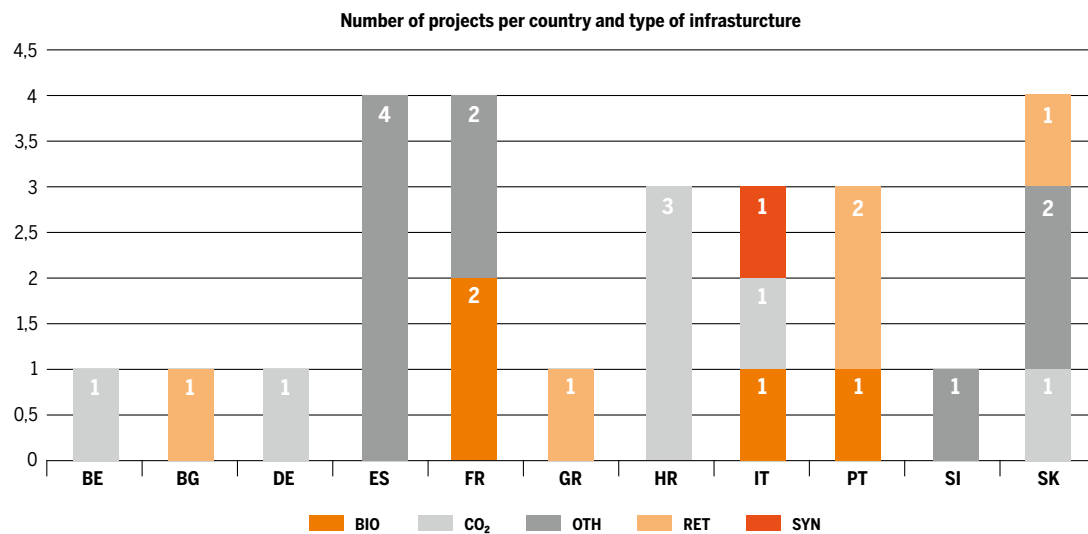


Figure 53: Number of projects per country and subcategory – BIO, CO₂, OTH, RET and SYN.

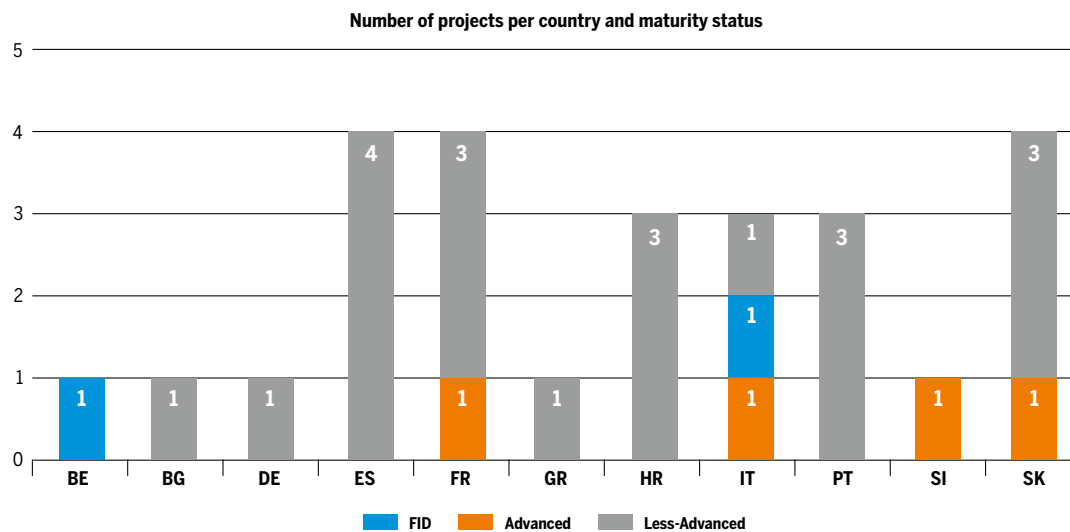


Figure 54: Number of smart gas grids and other projects per country and project maturity status.

8.3.3 ANALYSIS OF PROJECT SCHEDULE

Figure 55 shows the distribution of projects included in TYNDP 2026 according to the expected (first) commissioning year, in Figure 56 also in an aggregated way.

The majority of projects falling under the smart grid and other subcategories is planned to be commissioned within the next 7 years (19 out of

the 26 or 73 %), while the last commissioning year is 2039. All the projects having FID or Advanced status are expected to be commissioned by 2029.

Additionally, several years are not displayed in the following graphs, indicating that no projects are to be commissioned during those years.

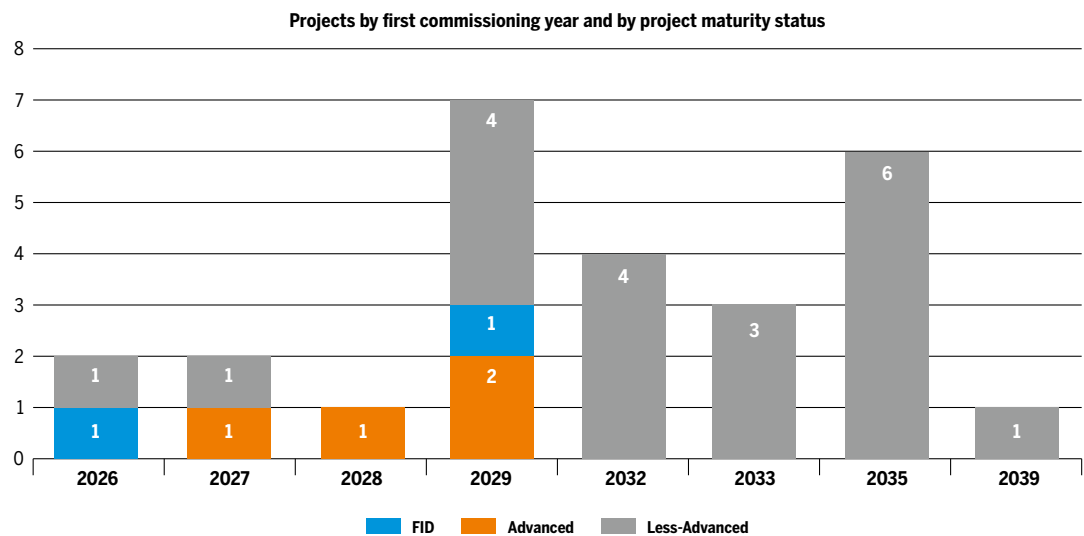


Figure 55: Projects by commissioning year and by project maturity status – BIO, CO₂, OTH, RET and SYN.

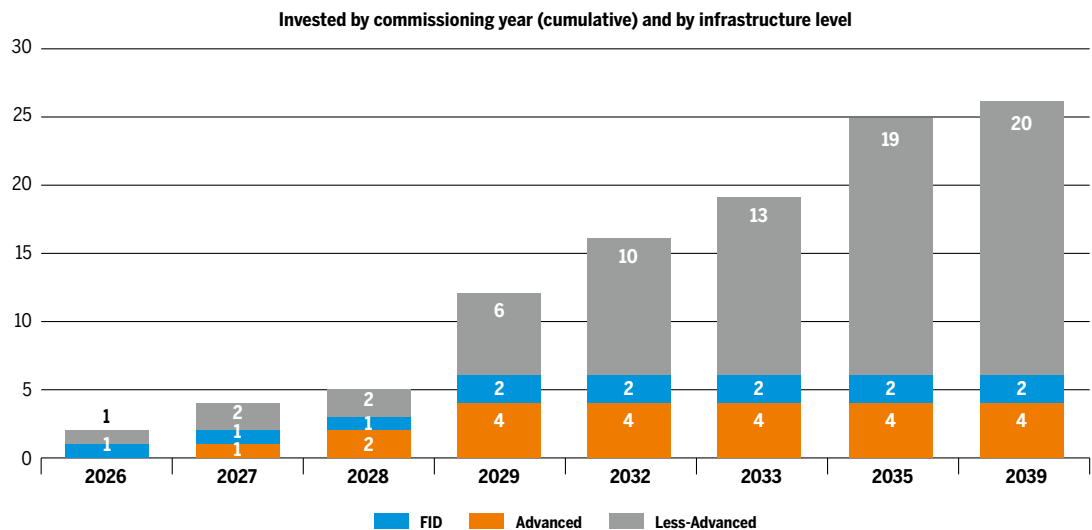


Figure 56: Projects by commissioning year (cumulative) and by project maturity status – BIO, CO₂, OTH, RET and SYN.

Feasibility, FEED, Permitting, FID, Construction and Commissioning

The **Feasibility Study phase**, the start and end dates, either past or expected, have been provided for 14 projects. The average duration of the Feasibility Study phase for these projects is 17 months.

In addition, eight projects have indicated the completion of the feasibility study until the end of TYNDP 2026 project collection period, while two projects have started the feasibility before the end of the project collection period, with expected finalisation date within 2026. Four projects are expected to finalise the feasibility study until January 2028.

Regarding the **FEED phase**, the start and end dates, either past or expected, have been provided for 22 projects. The average duration of the FEED phase for smart gas grid and other projects is 19 months.

Four projects have indicated the finalisation of FEED phase until the end of TYNDP 2026 project collection period. In addition, two projects have started FEED phase before the end of the project collection period but are still ongoing with the latest finalisation date in February 2027. The remaining 14 projects have started the FEED phase after the end of the project collection, while the latest end of the FEED phase is December 2037.

In case of the **Permitting phase**, the start and end dates, either past or expected, have been provided for 22 projects.

The average duration of the permitting phase for these projects is 20 months. More specifically, three projects have completed the permitting phase until end of the project collection period. Three projects have started permitting phase before the end of the project collection period but are still ongoing with the latest finalisation date in December 2029, while the remaining 16 projects will start their permitting process after the beginning of 2026 with the latest finalisation date in December 2038.

The **FID date**, either past or expected, has been provided for 23 projects. Four projects have obtained the FID until the end of the project collection period¹⁴. The average FID date is 27 December 2028.

Regarding the **Construction phase**, the start and end dates, either past or expected, have been provided for all the projects. The average duration of the Construction phase for these projects is 40 months.

Three projects have started their construction prior the end of the TYNDP 2026 project collection period. The remaining 23 projects have foreseen the start of the construction after the beginning of 2026 with latest end date in April 2040.

Figure 57 below provides all the information for the different phases described above.

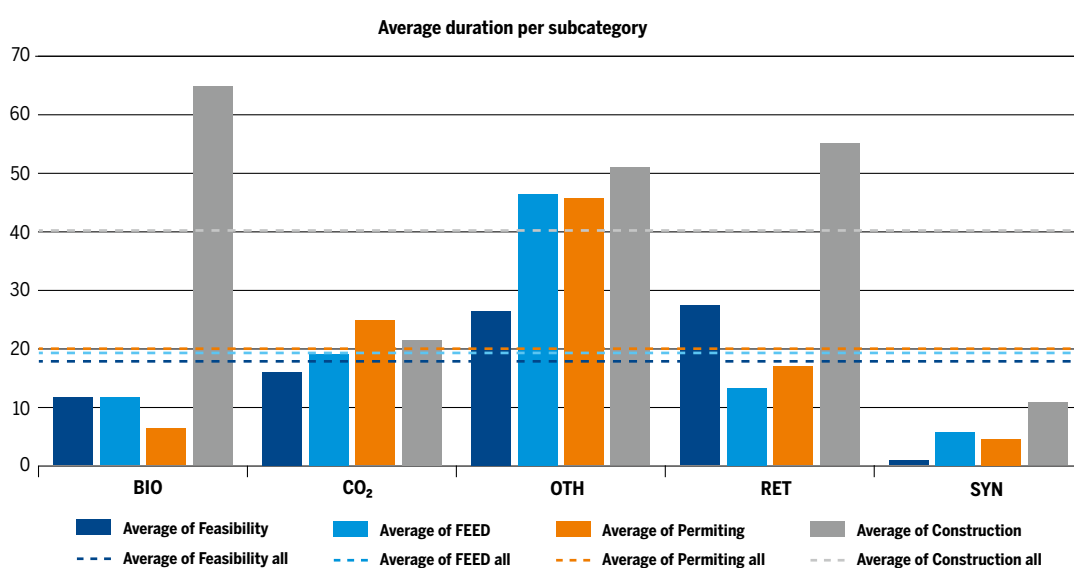


Figure 57: Average duration of Feasibility, FEED, Permitting and Construction phases – BIO, CO₂, OTH, RET and SYN.

¹⁴ Even though two projects have officially the FID status in TYNDP 2026, two more projects are supposed to receive it by the end of 2025 and thus, were included in the analysis.

The **Commissioning year** has been provided for all smart gas grid and other projects in TYNDP 2026. The average Commissioning year for these projects is 2032 with 20 Smart gas grid and Other projects expected to be commissioned by the end of 2039.

Status	Completed in TYNDP 2026	FID in TYNDP 2026	Advanced in TYNDP 2026	Less Advanced in TYNDP 2026	Cancelled/Not resubmitted to TYNDP 2026	Total
FID (TYNDP 2024)	1	0	0	0	2	3
Advanced (TYNDP 2024)	0	1	2	1	2	6
Less-Advanced (TYNDP 2024)	0	1	2	12	5	20
Total	1	2	4	13	9	29

Table 9: Evolution of projects from TYNDP 2024 to TYNDP 2026 (Smart Gas Grid and Other category)

Figure 58 and **Figure 59** illustrate the status of those 19 common projects according to TYNDP 2024 and TYNDP 2026 submissions. The charts show the share of those projects for which

a delay has been reported regarding their expected commissioning date and the length of this delay. Eight projects are delayed, five rescheduled and four are on time.

Share of scheduled status for resubmitted projects

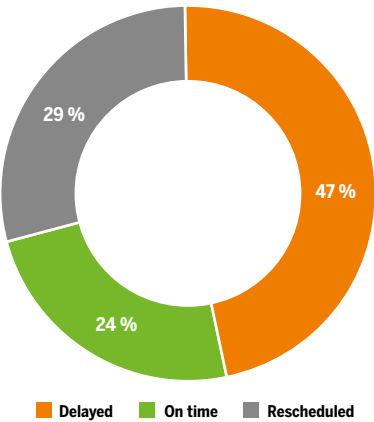


Figure 58: Share per scheduled status for resubmitted Smart gas grid and OTH projects

Reported delays of delayed and rescheduled projects from TYNDP 2024 to TYNDP 2026

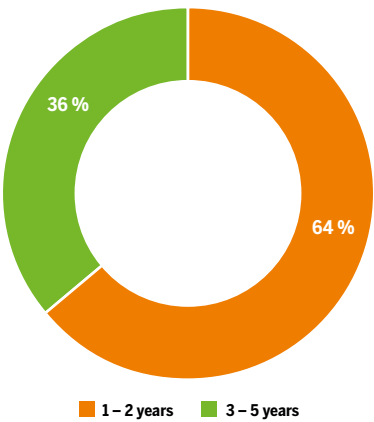


Figure 59: Reported delays from TYNDP 2024 to TYNDP 2026 for Smart gas grid and OTH projects.

Delay or rescheduling reason was provided for 15 Smart gas grid and Other projects. The majority of the explanations included:

- ▲ Funding and regulatory delays: **3 projects**
 - ▲ Project scope and schedule reassessment: **8 projects**
- ▲ Project interdependencies and demand assessments: **3 projects**
 - ▲ Other: **1 project**

8.3.4 INVESTMENT COSTS

Investment costs are for project promoters in many cases commercially sensitive information and might have the potential to negatively affect the competitive position of project promoters vis-à-vis contractors.

As part of the transparency process adopted, ENTSOG has collected information from promoters on indicative investment costs for all submitted projects.

In line with the TYNDP 2026 GPI, the cost data submitted by the project promoters for the projects to be included in the TYNDP is made public by ENTSOG unless the data is deemed confidential by the respective project promoters.

Smart gas grid and Other category represent around 5 % of the total TYNDP 2026 investments in terms of cost. The highest share of costs is represented in the Less-Advanced status (7 %) while the share of less advanced projects for all the Smart gas grid and Other projects is almost 77 % (see [Figure 60](#)).

As seen in [Figure 61](#), OTH and CO₂ projects (61 % of the total number of projects in this category), cover almost 88 % of the Smart gas grid and Other projects project costs. It should be noted that costs for SYN (1 project) are not included due to confidentiality reasons. The rest of the subcategories were submitted as aggregated data.

In addition, almost half of the total capital expenditures for Smart gas grid and Other projects will take place until 2029 (41 %), with the majority of the costs (85 %), taking place by 2032 (see [Figure 62](#)).

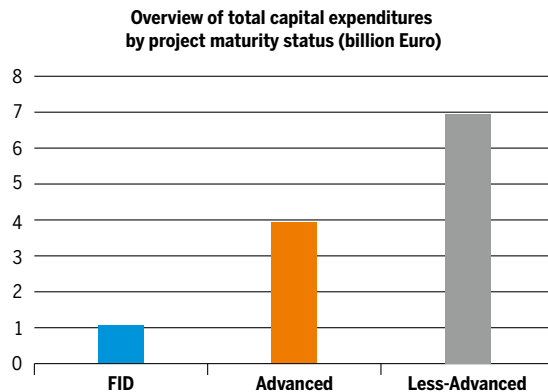


Figure 60: Overview of total capital expenditures by project maturity status – BIO, CO₂, OTH, RET and SYN.

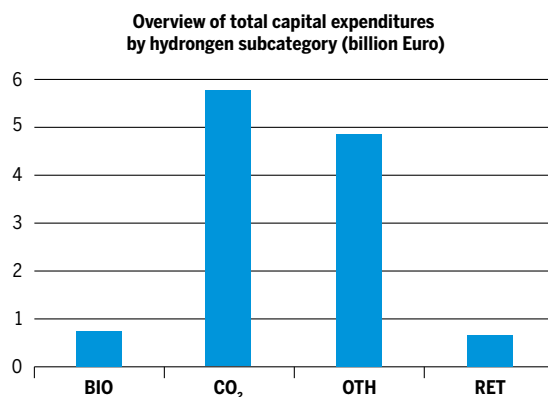


Figure 61: Overview of total capital expenditure by subcategory – BIO, CO₂, OTH and RET.

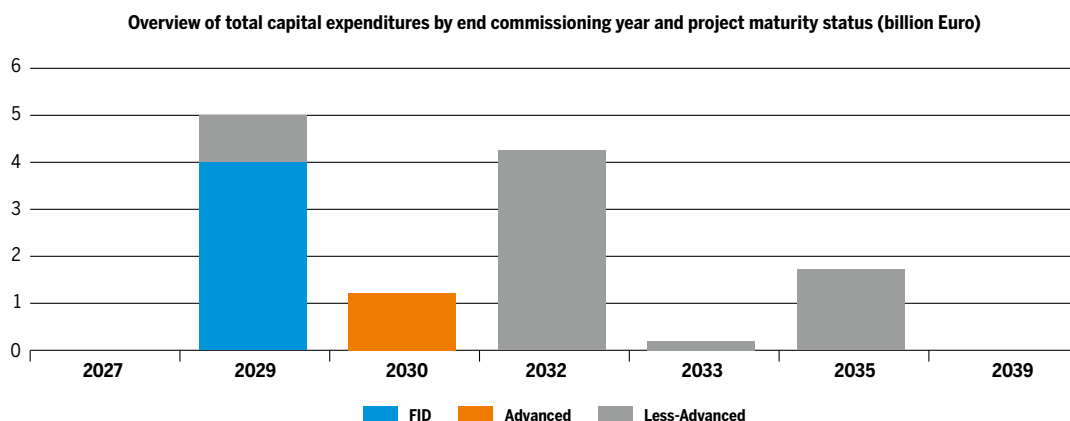


Figure 62: Overview of total capital expenditures by last commissioning year and project maturity status – BIO, CO₂, OTH and RET.

SYN category represented by only one project, thus is excluded from [Figure 62](#) for confidentiality reasons. In addition, several years are not displayed in the graph, indicating that no cost values were recorded for those periods.

8.3.5 TYNDP 2026 SUBMISSIONS AND NATIONAL DEVELOPMENT PLANS

Table 10 below presents the number of projects per country that are included or not in the respective NDP. Out of the total number of projects that were listed under the smart gas grid and other category, 15 (51 %) were included in the NDP.

The subcategory with the highest number of included projects was OTH (4) and RET (4) followed by CO₂ (3) and BIO (2), while the country with the most projects included in its NDP is Portugal.

Country	Part of NDP	NOT Part of NDP	Country	Part of NDP	NOT Part of NDP
AT	–	–	IT	2	1
BE	1	–	LT	–	–
BG	1	–	LU	–	–
BIH	–	–	LV	–	–
CH	–	–	MT	–	–
CY	–	–	NA	–	–
CZ	–	–	NL	–	–
DE	–	1	NO	–	–
DK	–	–	PL	–	–
EE	–	–	PT	3	–
ES	–	4	RO	–	–
FI	–	–	SE	–	–
FR	1	3	SI	1	–
GR	–	1	SK	4	–
HR	–	3	UA	–	–
HU	–	–	UK	–	–
IE	–	–			

Table 10: Overview of projects being part or not of NDPs by country – BIO, CO₂, OTH, RET and SYN.

Only for five projects reasons for non-inclusion were provided by the respective promoters:

- Either the development of the NDP is ongoing or the project is included in a specific Annex of the relevant NDP.

More details can be found in the relevant sheet on the National Development Plan Info in TYNDP 2026 Annex A.

9 INCREMENTAL CAPACITY PROCESS

9.1 DESCRIPTION OF THE INCREMENTAL CAPACITY PROCESS

The incremental capacity process has been introduced by the Commission Regulation (EU) 2017/459¹⁵ as a streamlined and harmonised Union-wide process to react to possible market-based capacity requests for an increase in technical capacity or creation of new capacity.

The requested incremental capacity is offered based on market demand: Technical capacity will be increased at an existing IP or through establishing a new IP, or by creating a physical reverse flow capacity at an IP that has not been offered before, but only if there are binding market commitments and subject to the positive outcome of an economic test.

The aim of setting rules for incremental capacity is to identify the need for new/incremental capacity and to allocate both existing and incremental capacity in an integrated way.

The process lasts two years and is divided into two phases: a non-binding phase in which demand for incremental capacity is assessed, and a binding phase in which network users make binding commitments for incremental capacity.

The **non-binding phase** starts immediately after the annual yearly auctions, at least in each odd-numbered year, with the assessment of demand indications for incremental capacity. Network users provide TSOs with their non-binding capacity demand. No later than 8 weeks after the start of the annual yearly auctions, TSOs shall produce market demand assessment reports (DARs) which shall be published within 16 weeks after the start of the annual yearly auctions. Among other things, the DARs should consider whether the TYNDP identifies a physical capacity gap that would leave a specific region undersupplied in a reasonable peak scenario, and whether providing incremental capacity at the interconnection point in question would bridge the gap.

They must also consider whether a national network development plan identifies a concrete and ongoing physical transport need. If the DAR identifies demand for incremental capacity that cannot be met by existing available capacity, the TSOs involved will continue with the incremental capacity process. If no respective demand for incremental capacity is identified, the process stops here.

In the **design phase**, TSOs carry out technical studies for incremental capacity projects and coordinated offer levels based on technical feasibility and on the basis of the DARs. A public consultation is held on the key elements of the draft project proposal and stakeholders are given the opportunity to provide feedback on the TSOs' proposals. A key milestone following the design phase and public consultation is the submission of a comprehensive incremental capacity project proposal to the relevant NRAs. The NRAs then have 6 months to issue coordinated decisions on the project proposal(s).

Following the NRAs' decisions, the **binding phase** starts and binding commitments for incremental capacity are collected from network users during the annual yearly auctions. Auctions are used by default, but, subject to NRA approval, an **alternative capacity allocation** mechanism may be used.

After receiving binding commitments for incremental capacity offered in the annual yearly auctions, the economic viability of the incremental capacity project is assessed through the economic test. If the outcome of the economic test is positive on both sides of an interconnection point for at least one offer level that includes incremental capacity, an incremental capacity project is initiated. If more than one offer levels results in a positive economic test, the offer level including the highest amount of incremental capacity will be realised.

15 COMMISSION REGULATION (EU) 2017/459 of 16 March 2017 establishing a network code on capacity allocation mechanisms in gas transmission systems and repealing Regulation (EU) No 984/2013.

9.2 INCREMENTAL CAPACITY PROCESS INITIATED IN 2021

The third incremental capacity process started immediately after the start of the annual yearly auction in 2021 when TSOs initiated the demand assessment phase.

To analyse the progress of the incremental capacity process and to determine whether new capacity projects would be initiated as a result, data was collected from 37 ENTSG members. Based on these data and further interaction with the TSOs, a [report](#) on the third incremental capacity process was prepared and published. Additional information

on this process can also be found in the [annexes](#) to that report, in particular in Annex 3.1 which contains the TSOs' responses to the launched questionnaire.

The table below shows the projects where a demand for incremental capacity was reported in the DARs and provides information on the entry-exit borders and the TSOs concerned, and whether the different steps of the incremental capacity process have been executed or not. The table also includes the specific TYNDP reference number for the projects included in the TYNDP 2024.

TYNDP 2024 reference number	Entry-exit border	Involved TSOs	Execution of technical studies	Launch of public consultation	Submission of project proposal to NRA	Publication of coordinated decisions by NRAs	Yearly auctions for incremental capacity
TRA-A-971 TRA-F-1276 TRA-F-1278	GR-TAP	DESFA TAP	✓	✓	✓	✓	<i>Alternative allocation mechanism</i>
TRA-N-128 TRA-N-1112 TRA-F-378	GR-ICGB	DESFA ICGB	✓	✓			
TRA-A-1141 TRA-A-1009	CZ-PL	GAZ-SYSTEM NET4GAS	✓	✓			
Not included	PL-UA	GAZ-SYSTEM GTSOU	✓	✓	✓	✓	✓
Not included	BE-DE	Fluxys OGE Fluxys TENP Thyssengas GASCADE Creos	✓	✓	✓	✓	✓
TRA-N-1195	IT-TAP	SNAM TAP	✓	✓	✓	✓	<i>Alternative allocation mechanism</i>
TRA-A-810	GR-AL-IT	DESFA TAP SNAM	✓	✓	✓	✓	<i>Alternative allocation mechanism</i>
Not included	RO-UA	TRANSGAZ GTSOU	✓	✓	✓		

Table 11: Projects for which a demand for incremental capacity was identified in the DARs.

None of the TSOs that were involved in auctioning of incremental capacities (the default option as explained earlier) received binding commitments from network users. Consequently, based on Art. 22 of CAM NC, none of these TSOs or NRAs had to carry out a single economic test, however the German NRA did perform the test. In the end no positive outcomes of the economic tests were reported.

However, the outcome of the (first) binding phase for the Greece-Albanian-Italian project that was offered through an alternative allocation mechanism was positive. This means that binding commitments were received from network users and the economic test performed in this regard was positive. The second part of the binding phase organised by the TSOs involved (SRG, DESFA and TAP) was closed during the first quarter of 2024.

9.3 INCREMENTAL CAPACITY PROCESS INITIATED IN 2023

Immediately after the start of the annual yearly capacity auctions in July 2023, a new cycle of the incremental capacity process has started.

The table below shows the current status of the incremental capacity process cycles that have had a positive outcome from the market demand

assessment and for which a project proposal has also subsequently been submitted for consultation. During this cycle, a number of TSOs and NRAs have chosen to accelerate the phases from the public consultation period in order to be able to offer incremental capacity during the annual auctions in July 2024 instead of a year later.

TYNDP 2024 reference number	Entry-exit border	TSOs involved	Gas flow direction(s) concerned	Status & results of INC project
TRA-F-1048 TRA-N-670	BG–BG (ICGB)	<u>Bulgartransgaz EAD</u> <u>ICGB AD</u>	Exit BG – Entry BG	Finished without allocation of INC capacity – IP Stara Zagora (Art. 30 CAM)
TRA-N-1140	BG–GR	<u>Bulgartransgaz EAD</u> <u>DESFA S.A.</u>	Exit GR – Entry BG	Finished without allocation of INC capacity – IP Kulata/Sidirokastro (Art. 30 CAM)
TRA-N-1124	BG–RO	<u>Bulgartransgaz EAD</u> <u>SNTGN Transgaz S.A.</u>	Exit BG – Entry RO	Finished without allocation of INC capacity – IP Negru Voda 1/ Kardam (Art. 30 CAM)
TRA-F-128	GR–GR (ICGB)	DESFA S.A. ICGB AD	Exit GR – Entry GR	Finished without allocation of INC capacity – IP Komotini (Art.30 CAM)
TRA-F-1278 TRA-N-736 TRA-N-1131 TRA-N-1195	GR–GR (NNGS) GR–IT (TAP)	DESFA S.A. <u>Trans Adriatic Pipeline (TAP)</u> <u>Snam Rete Gas</u> DESFA	Expansion of the Greek National Natural Gas System (NNGS) Multiple	Finished without allocation of INC capacity – Multiple Greek IPs (Art. 30 CAM) Finished without allocation of INC capacity
TRA-A-1322	HU–RO	<u>SNTGN Transgaz SA</u> <u>FGSZ Ltd.</u>	Exit RO – Entry HU	Finished after negative economic test – Csanádpalota (Art. 30 CAM)
TRA-N-245	PL–UA	<u>GAZ-SYSTEM S.A.</u> LLC Gas TSO of Ukraine	Exit PL – Entry UA	Finished without allocation of INC capacity – IP GCP GAZ-SYSTEM/ UA TSO (Art. 30 CAM)
Not included	RO–UA	LLC Gas TSO of Ukraine SNTGN Transgaz SA	Bi-directional	Finished without allocation of INC capacity – IP Isaccea 1/Orlovka 1 (Art. 30 CAM)

Table 12: Current status of incremental capacity process cycles with positive market demand assessment and submitted project proposals

On four occasions, TSOs organised a binding bidding phase, but none of the TSOs that were involved in auctioning of incremental capacities received binding commitments from network users.

Consequently, these TSOs have concluded the Incremental capacity process without the construction of an incremental capacity project.

9.4 INCREMENTAL CAPACITY PROCESS INITIATED IN 2025

Immediately after the start of the annual yearly capacity auctions on 7 July 2025, a new cycle of the incremental capacity process started. **Figure 60** illustrates the timeline for this process.

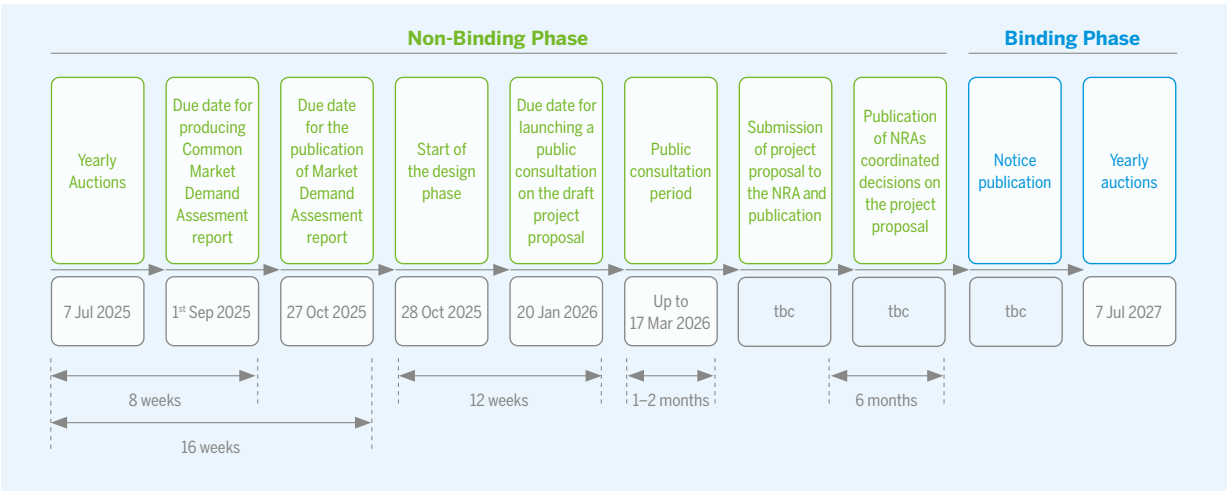


Figure 63: Timeline for the incremental capacity process initiated in 2025.

During this cycle, from 7 July 2025 onwards, the TSOs have opened the possibility to network users to give a demand indication for one or more inter-connection points. In the eight weeks that followed, there were demand indications that can potentially lead to an incremental capacity project:

- ▲ TAP, DESFA and SRG will proceed to the next phase of the 2025 Incremental Capacity process and open the Coordinated Design Phase.

- ▲ An incremental capacity project would be proposed for the entry-exit points within the networks operated by GAZ-SYSTEM and LLC “Gas Transmission System Operator of Ukraine”.

Other than these two, no demand indications were received, and the TSOs concerned confirmed this in their Demand Assessment Reports, which were published at the end 2025 and early 2026.

DIFFERENCES BETWEEN TYNDP AND TRANSPARENCY PLATFORM DATA

Regulation (EU) no. 2024/1789 and its amendments require ENTSOG to provide a Union-wide central platform where all Transmission System Operators for gas shall make their relevant data publicly available.

The Transparency Platform provides technical and commercial data on gas transmission systems on a daily and hourly basis, which include interconnection points and connections with storages, LNG facilities, distribution networks, final consumers and production facilities.

The platform is available online:

<https://transparency.ENTSOG.eu/#/map>

where the interested parties are able to access valuable information uploaded by all TSOs.



Firm technical capacity data collected and used for the TYNDP might differ from the capacity data published on the ENTSOG Transparency Platform for the main following reasons:

- ▲ Though the modelling mostly uses the ENTSOG Transparency Platform topology, in some cases the topology used in the TYNDP differs from the latter. This is to better serve simulations purposes;
- ▲ Both existing capacity and project capacities are not constantly updated during the TYNDP process but have a specific time stamp (1 January 2026 for existing infrastructure while for projects the closure day of the data collection);
- ▲ Capacities are modelled in the TYNDP after the application of the Lesser-of-Rule.

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LIST OF ABBREVIATIONS

ACER	European Union Agency for the Cooperation of Energy Regulators
BIO	Biomethane development projects
CAPEX	Capital expenditure
CO₂	Carbon dioxide
EC	European Commission
ENNOH	European Network of Network Operators for Hydrogen
ENTSOG	European Network of Transmission System Operators for Gas
ESI	Energy System Integration
ETR	Energy Transition Projects (in previous TYNDPs)
EU	European Union
FEED	Front-end engineering design
FID	Final investment decision
FSRU	Floating storage and regasification unit
GIE	Gas Infrastructure Europe
GPI	Guidelines for project inclusion
H-gas	High-calorific gas
H2E	Electrolysers for hydrogen production
H2L	Hydrogen reception facilities
H2M	Hydrogen in the transport sector for mobility
H2S	Hydrogen storage facilities
H2T	Hydrogen transmission pipelines
IP	Interconnection point
L-gas	Low-calorific gas
LNG	Liquefied natural gas
LOHC	Liquid Organic Hydrogen Carrier
NA	Not available / Not Applicable
NDP	National Development Plan
NG	Natural gas
NRA	National Regulatory Authority
OTH	Other infrastructure-related projects
PCI	Project of Common Interest
PMI	Project of Mutual Interest
RED III	Renewable Energy Directive III
REPowerEU	EU plan to accelerate the clean energy transition reduce dependence on Russian fossil fuels
RET	Retrofitting projects to integrate hydrogen blends
SYN	Synthetic methane projects
TEN-E	Trans-European Networks for Energy
TRA	Gas transmission pipelines
TSO	Transmission System Operator
TYNDP	Ten-Year Network Development Plan
UGS	Underground Gas Storage (facility)

COUNTRY CODES (ISO)

AL	Albania	LU	Luxembourg
AT	Austria	LV	Latvia
AZ	Azerbaijan	LY	Libya
BA	Bosnia and Herzegovina	MA	Morocco
BE	Belgium	ME	Montenegro
BG	Bulgaria	MK	North Macedonia
BY	Belarus	MT	Malta
CH	Switzerland	NL	Netherlands
CY	Cyprus	NO	Norway
CZ	Czech Republic	PL	Poland
DE	Germany	PT	Portugal
DK	Denmark	RO	Romania
DZ	Algeria	RS	Serbia
EE	Estonia	RU	Russia
ES	Spain	SE	Sweden
FI	Finland	SI	Slovenia
FR	France	SK	Slovakia
GR	Greece	TM	Turkmenistan
HR	Croatia	TN	Tunisia
HU	Hungary	TR	Türkiye
IE	Ireland	UA	Ukraine
IT	Italy	UK	United Kingdom
LT	Lithuania		

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In particular, the information hereby provided with specific reference to the Projects of Common Interest (“PCIs”) and Projects of Mutual Interest (“PMIs”) is not intended to evaluate individual impact of the PCIs and PMIs and PCI candidates and PMI candidates. For the relevant assessments in terms of value of each PCI and PMI the readers should refer to the information channels or qualified sources provided by law.

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