



**Demand assessment report
for incremental capacity
between *Trans Adriatic Pipeline, Snam Rete
Gas and DESFA***

– Document for publication –

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

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A. NON-BINDING DEMAND INDICATIONS

Background

Trans Adriatic Pipeline (**TAP**), Snam Rete Gas (**SRG**) and DESFA have launched the Demand Assessment Phase of the Incremental Capacity process on 7 July 2025, in line with the provisions of Article 26 of Commission Regulation (EU) 2017/459 establishing a network code on capacity allocation mechanisms in gas transmission systems (**CAM NC**).

Interested Parties have been given the opportunity to submit Non-Binding Demand Indications until 1 September 2025. A Revision Window for the Non-Binding Phase of the 2025 Market Test was opened between 22 December 2025 and 16 January 2026. During the Revision Window, Non-Binding Demand Indications could be revised and any other parties wishing to submit Non-Binding Demand Indications under the 2025 Market Test could also do so, ensuring a timely inclusion in this Demand Assessment Report (**DAR**).

- TAP

TAP conducts its Market Test process under the Guidelines for the 2025 Market Test of Trans Adriatic Pipeline (**the Guidelines**) which define the rules and procedures to be followed in the 2025 Market Test. These Guidelines reflect TAP's specific regulatory regime for its Market Tests. They seek to align the provisions of the *Final Joint Opinion of the Energy Regulators on TAP AG's Exemption Application, dated 6 June 2013, granted by the Authorities pursuant to Directive 2009/73/EC (FJO)* and of TAP's Tariff Code with the CAM NC.¹

TAP launched the 2025 Market Test on 7 July 2025, in coordination with its adjacent TSOs, and invited parties to submit Non-Binding Demand Indications by expressing interest for non-binding Capacity Requests, and/or Connection Requests as per the Guidelines until 1 September 2025. In addition, to mitigate any potential negative consequences of the overlap with the Binding Phase of the 2023 Market Test, the Guidelines foresaw a Revision Window after the capacity allocation under the Binding Phase of the 2023 Market Test. No capacity was allocated in the 2023 Market Test.

The Non-Binding Demand Indications accounted for in this report were submitted by the Interested Parties to TAP in compliance with the 8 weeks deadline set out in the Guidelines (by 1 September 2025).

The Non-Binding Demand Indications are listed in an aggregated manner per TAP's interconnection points where Non-Binding Demand Indications were submitted. Please note that TAP, together with

¹ The Guidelines may be found on TAP's Market Test [webpage](#).

ICGB, published the Demand Assessment Report for the interconnection point Komotini (IGB) in October 2025.²

- SRG

SRG received the Non-Binding Demand Indications by the interested parties in compliance with the 8 weeks deadline set out as per Article 26(6) CAM NC. The Non-Binding Demand Indications refer to incremental capacities at the interconnection point Melendugno Entry. The received non-binding demand shall be considered according to Article 26(7) CAM NC for the current cycle of incremental capacity as revised during the Revision Window that took place between 22nd December 2025 – 16th January 2026.

These Non-Binding Demand Indications have been reported in the tables in this Demand Assessment Report as received by SRG including the revised ones.

- DESFA

On July 7th 2025, DESFA invited all interested parties to submit Non-Binding Demand Indications for incremental capacity at existing or new Interconnection Points of the Greek Natural Gas Transmission System, according to the provisions of CAM NC. DESFA received non-binding demand indication(s) by interested party(ies) within the 8 weeks deadline set out as per Article 26(6) CAM NC, regarding Nea Mesimvria Exit Point. The aggregated non-binding demand indication(s) as received by DESFA is presented in table 1.4 below.

The tables below show the aggregated Non-Binding Demand Indications per IP and a breakdown of the Non-Binding Demand Indications for Forward Firm Capacity.

² [https://www.tap-ag.com/shippers/market-tests-7/market-tests-9/\\$30938/\\$30979/\\$31386](https://www.tap-ag.com/shippers/market-tests-7/market-tests-9/$30938/$30979/$31386) (TAP and ICGB will not proceed to the Coordinated Design phase for the definition of technical studies with regards to incremental capacity at the IP Komotini.)

1. Non-Binding Demand Indications for Forward Firm Capacity

1.1 Aggregated demand at IP Kipoi TAP Entry

The aggregated non-binding demand indications received by TAP for the entry point of Kipoi are shown below:

Entry Capacity	Gas year	Amount kWh/d
TAP	2026/2027	33,000,000
TAP	2027/2028	33,000,000
TAP	2028/2029	33,000,000
TAP	2029/2030	33,000,000
TAP	2030/2031	33,000,000
TAP	2031/2032	33,000,000
TAP	2032/2033	33,000,000
TAP	2033/2034	33,000,000
TAP	2034/2035	33,000,000
TAP	2035/2036	33,000,000

1.2 Aggregated demand at IP Melendugno TAP Exit, SRG Entry

The aggregated Non-Binding Demand Indications which were received by both TAP and SRG for IP Melendugno are shown below:

From Exit Capacity	To Entry Capacity	Gas year	Amount kWh/d
TAP	SRG	2026/2027	11,000,000
TAP	SRG	2027/2028	11,000,000
TAP	SRG	2028/2029	11,000,000
TAP	SRG	2029/2030	11,000,000
TAP	SRG	2030/2031	11,000,000
TAP	SRG	2031/2032	11,000,000
TAP	SRG	2032/2033	11,000,000
TAP	SRG	2033/2034	11,000,000
TAP	SRG	2034/2035	11,000,000
TAP	SRG	2035/2036	11,000,000

1.3 Aggregated demand at IP Nea Mesimvria TAP Exit, DESFA Entry

The aggregated Non-Binding Demand Indications referring to TAP's Forward Firm Capacity received by both TAP and DESFA for IP Nea Mesimvria are shown below:

From Exit Capacity	To Entry Capacity	Gas year	Amount kWh/d
TAP	DESFA	2026/2027	22,000,000 ³
TAP	DESFA	2027/2028	22,000,000
TAP	DESFA	2028/2029	22,000,000
TAP	DESFA	2029/2030	22,000,000
TAP	DESFA	2030/2031	22,000,000
TAP	DESFA	2031/2032	22,000,000
TAP	DESFA	2032/2033	22,000,000
TAP	DESFA	2033/2034	22,000,000
TAP	DESFA	2034/2035	22,000,000
TAP	DESFA	2035/2036	22,000,000

2. Conditionalities

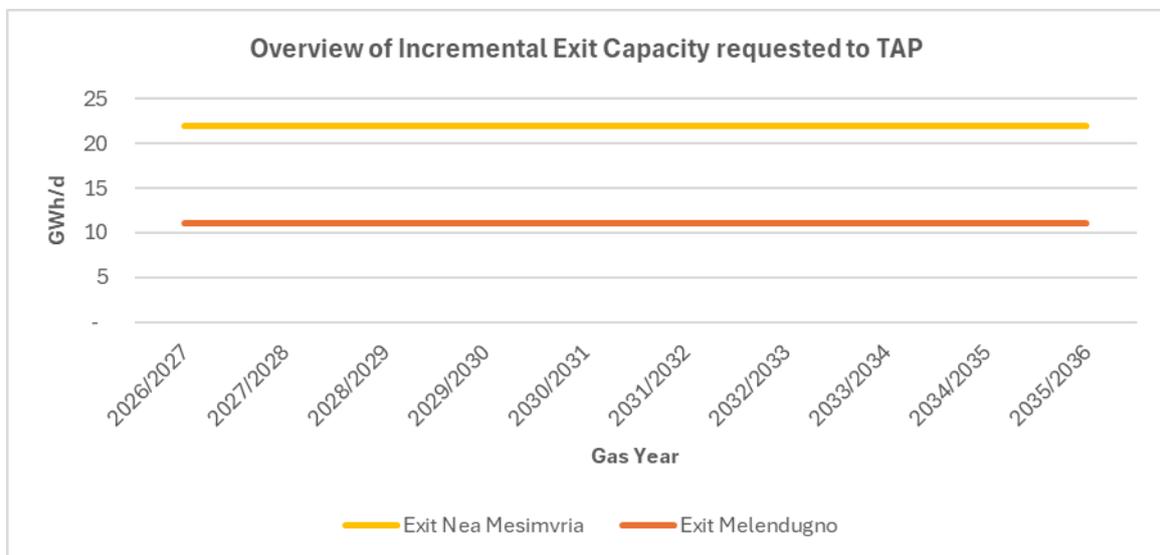
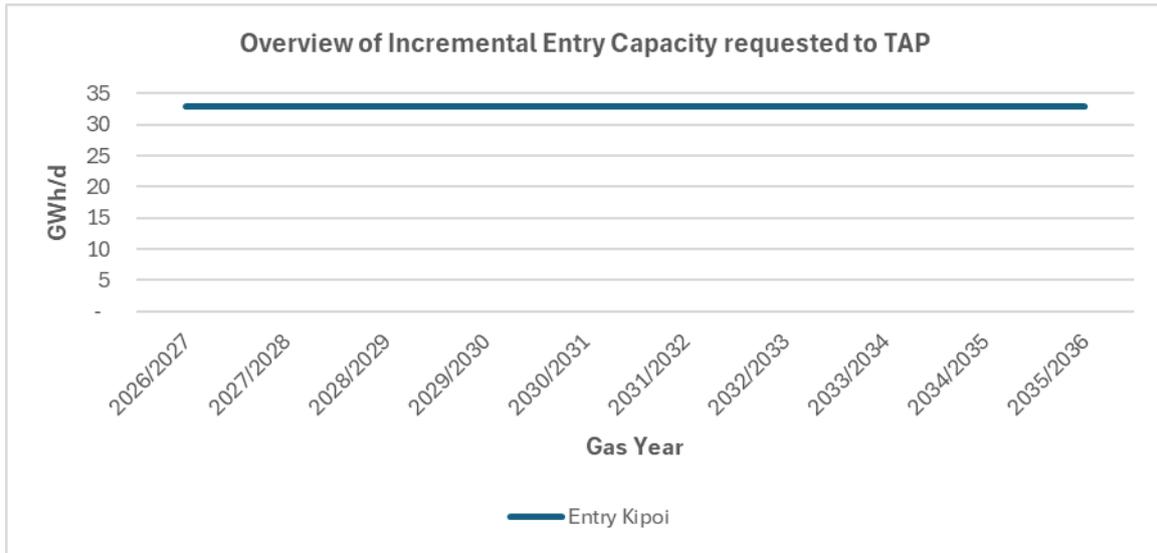
Conditionalities were listed, as per Article 26(8) letter d) of CAM NC, applicable to their non-binding Capacity Requests in TAP. The main conditionality refers to linking commitments at different interconnection points (*i.e.* interest in entry capacity to TAP being conditional upon the same amount of capacity being allocated at the requested exit point of TAP as well as at the entry to the relevant adjacent TSO).

³ The non-binding demand indication(s) received by DESFA for the GY2026/27 were equal to 12,500,000 kWh/d.

B. DEMAND ASSESSMENT

- TAP

In total, TAP has received the following maximum amounts expressed in GWh/d, as shown in the graphs below:

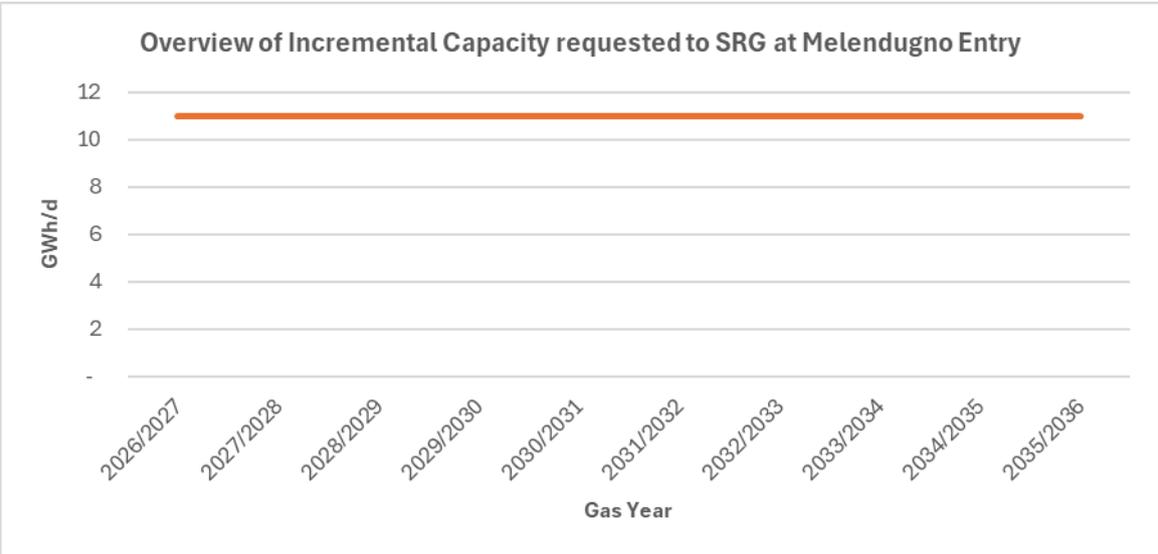


In accordance with Section 4.7.5 and 4.7.8 of the FJO and to the Guidelines, interested parties could also submit non-binding requests to build a new entry and/or exit point in Albania or Greece and/or to increase the technical capacity of an already existing entry and/or exit point in Albania. No such Connection Requests have been received following the start of this Non-Binding Phase. However, works or studies are already underway regarding exit points at Korca, Roskovec and Fier in Albania.

Depending on further progress, TAP will determine whether such exit points will be included in a Project Proposal under this Market Test.

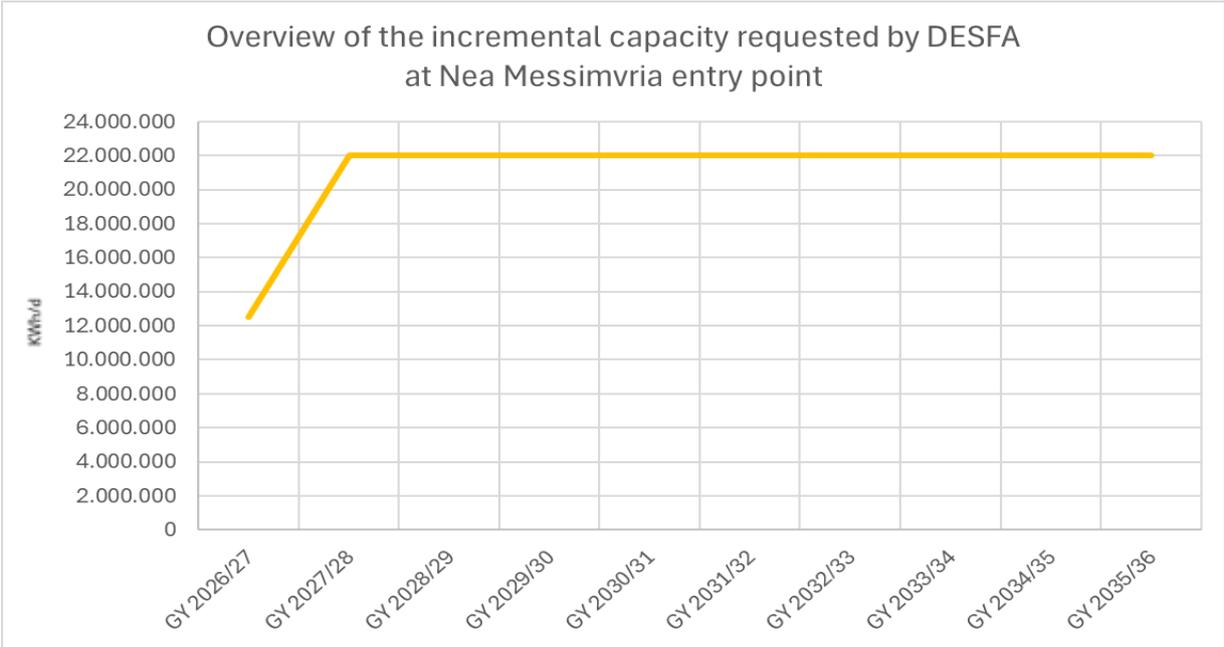
- SRG

In total, SRG has received the following maximum amounts expressed in GWh/d, as shown in the graph below:



- DESFA

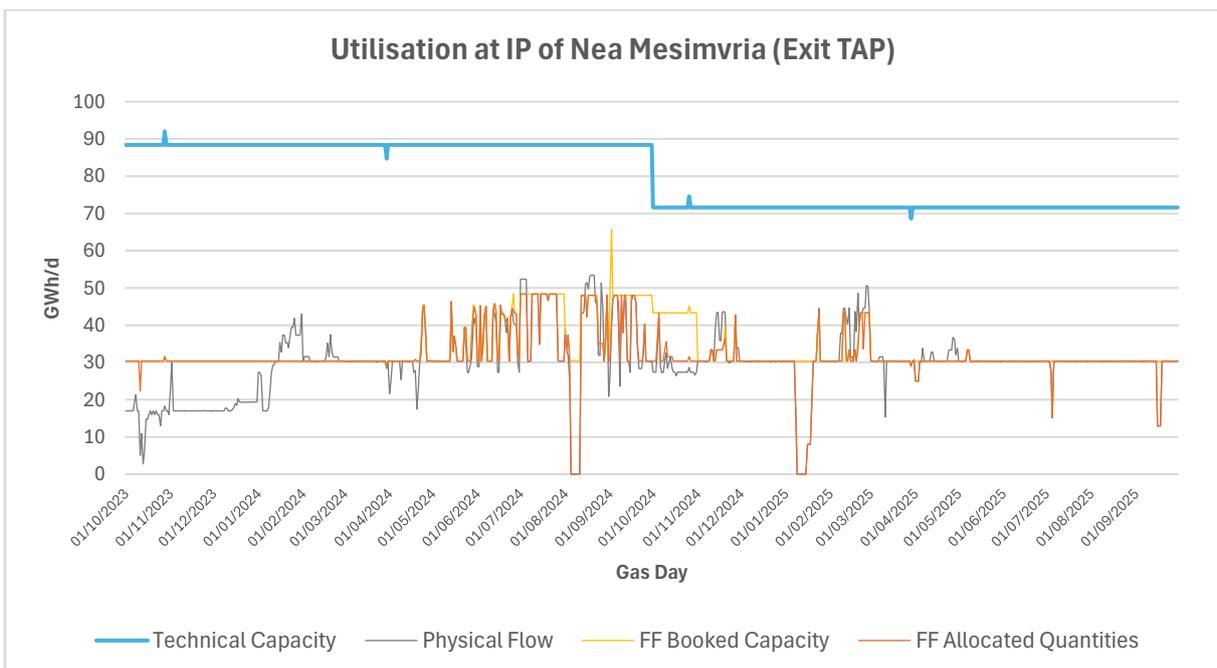
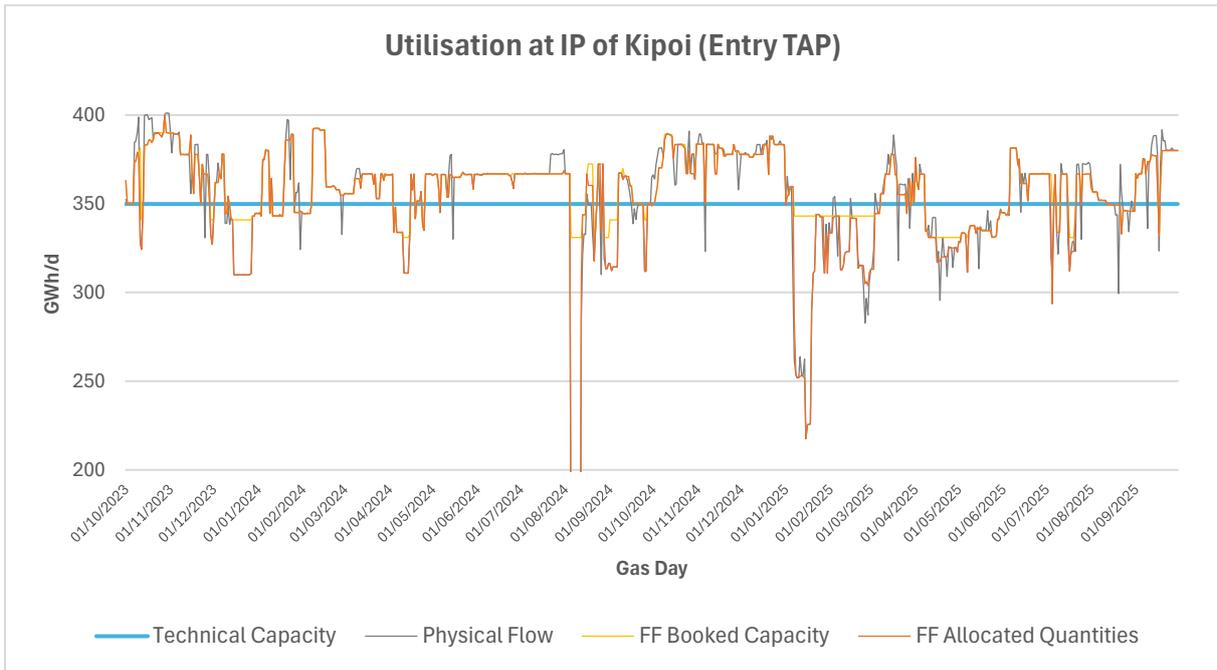
In total, DESFA has received the following maximum amounts expressed in kWh/d, as shown in the graph below:

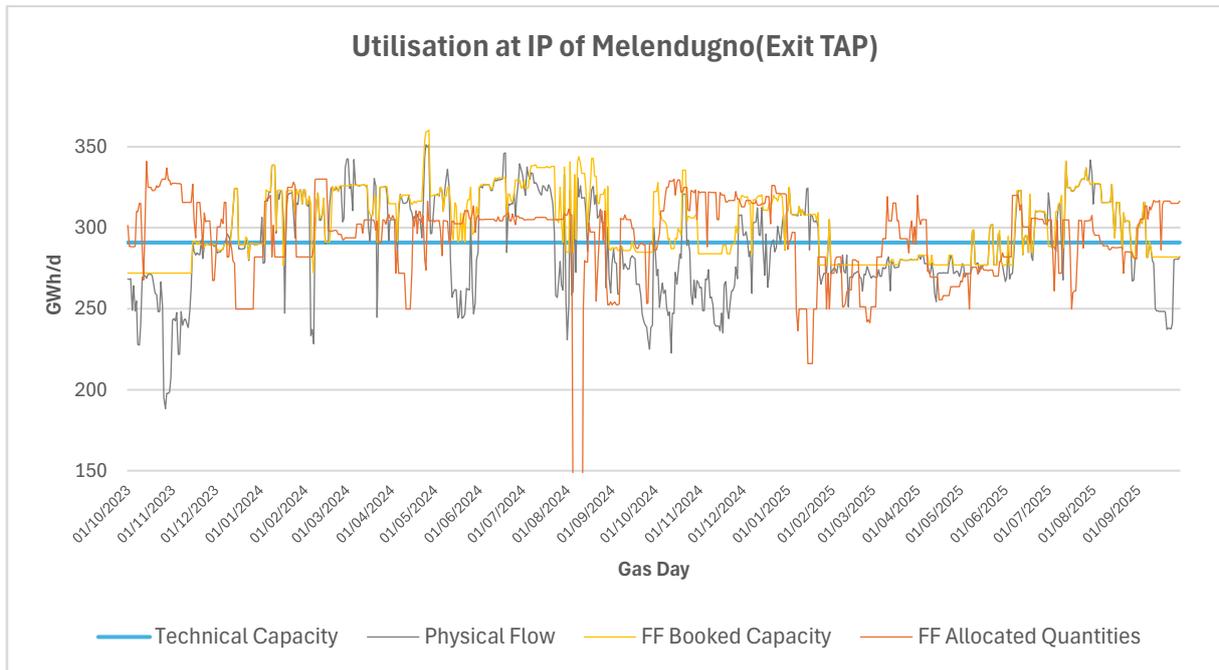


1. Historical usage pattern

The utilization of the technical capacity per IP is presented in the charts below by comparing the technical capacity with the booked capacity, the allocated commercial flows and physical flows for gas years 2023/2024 and 2024/2025.

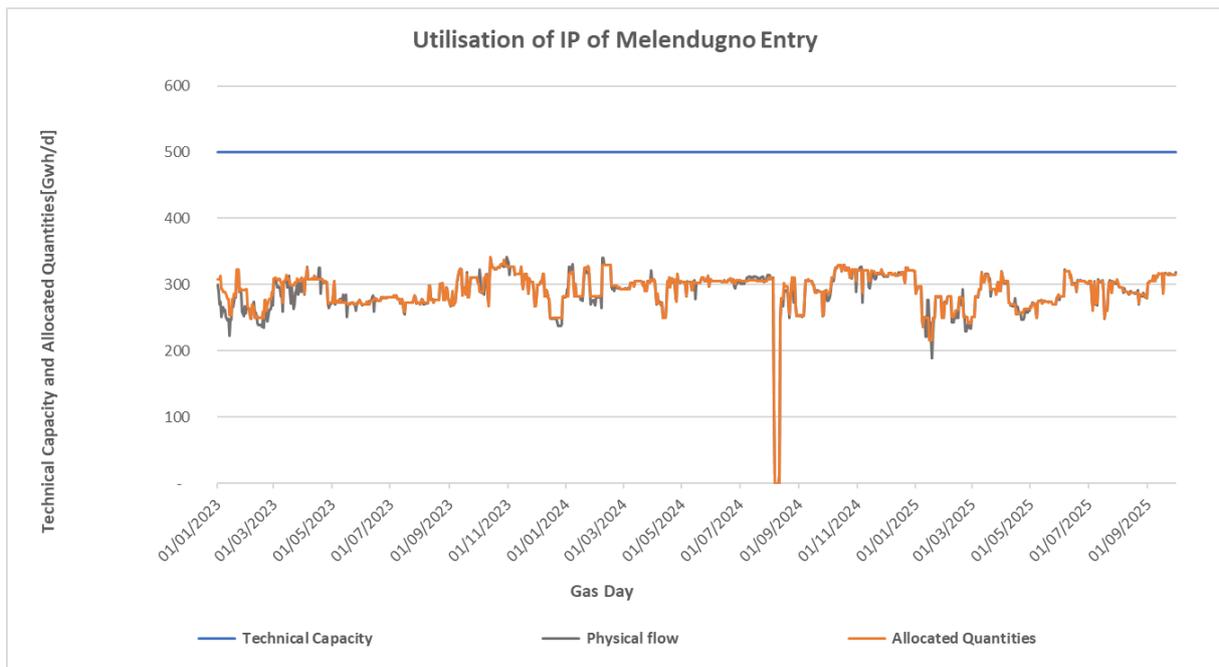
- TAP

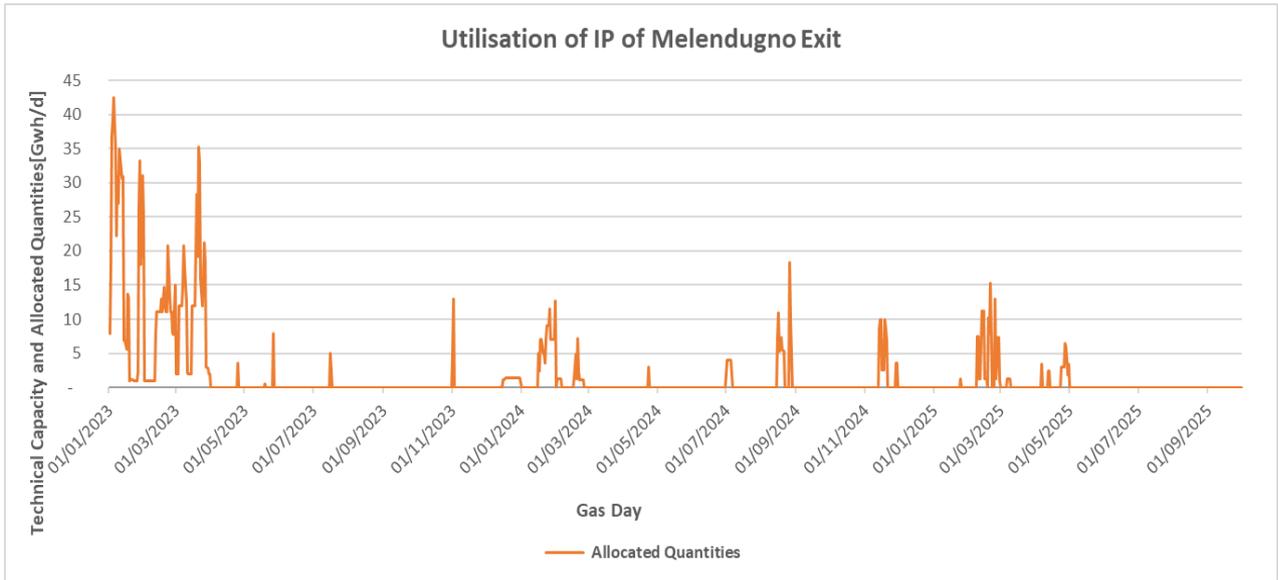




During the Gas Years 2023/2024 and 2024/2025, TAP has maximized the offer of day-ahead and short-term capacity at its interconnection points, doing dynamic recalculations applicable to the offer of day-ahead products on the basis of operational conditions.

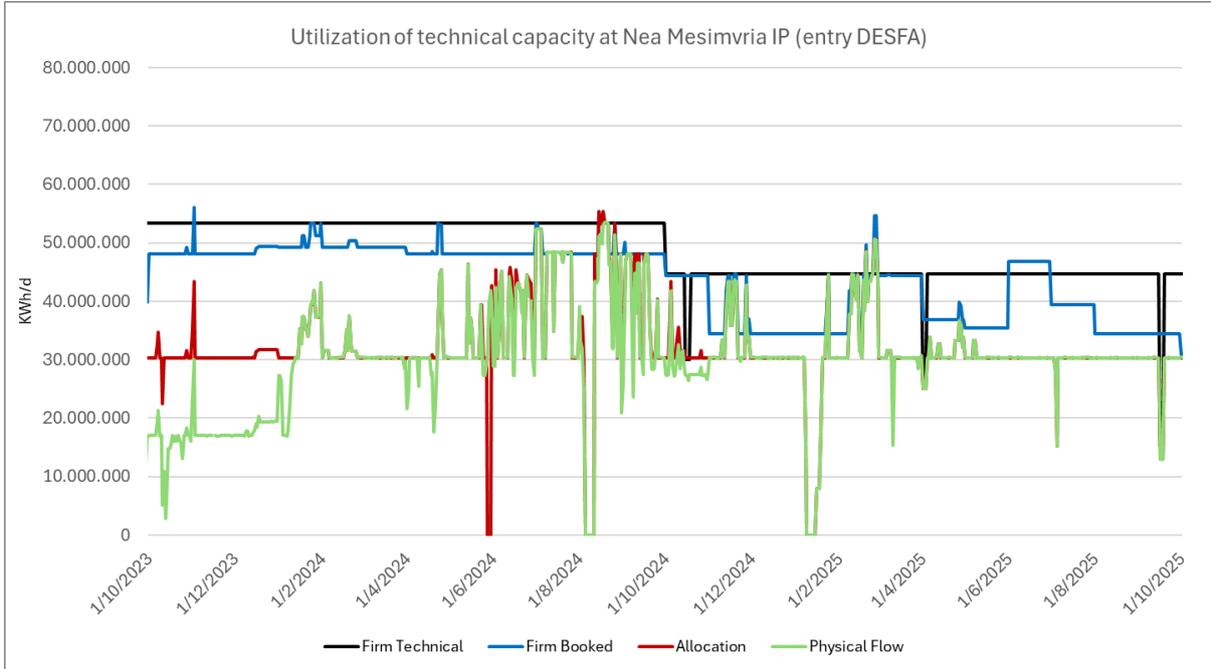
- SRG





- DESFA

The utilization of the entry capacity in DESFA System is presented in the graph below.



2. Results of current annual yearly auction

- TAP

TAP offered the following products during the annual yearly auction from July 2025:

Interconnection Point Exit/Entry	Capacity Type	Flow direction	Product	Gas Year	Offered Capacity kWh/d	Booked Capacity kWh/d
Nea Mesimvria Entry - Komotini Exit	Interruptible (Commercial Reverse Route 3 - bundle)	TAP --> IGB	Yearly	2025/2026	30,346,301	0
Melendugno Entry – Komotini Exit	Interruptible (Commercial Reverse route 2 – bundle)	TAP --> IGB	Yearly	2025/2026	55,641,308	0

- SRG

SRG offered the following products during the annual yearly auction from July 2025:

Interconnection Point Exit/Entry	Capacity Type	Flow direction	Product	Gas Year	Offered Capacity kWh/d	Booked Capacity kWh/d
Melendugno entry	Firm	TAP --> SNAM	Yearly	2025/2026	139,158,816	0

- DESFA

The results regarding the total offered firm capacity and the booked firm capacity after the most recent annual yearly firm capacity auction that took place on the 7th of July 2025 for the IP Nea Mesimvria, are presented below:

Interconnection Point Exit/Entry	Capacity Type	Flow direction	Product	Gas Year	Offered Capacity kWh/d	Booked Capacity kWh/d
Nea Mesimvria entry	Firm	TAP --> DESFA	Yearly	2025/2026	44,612,000	30,846,301
Nea Mesimvria entry	Firm	TAP --> DESFA	Yearly	2026/2027	44,612,000	39,846,301
Nea Mesimvria entry	Firm	TAP --> DESFA	Yearly	2027/2028	44,612,000	30,846,301
Nea Mesimvria entry	Firm	TAP --> DESFA	Yearly	2028/2029	44,612,000	30,846,301
Nea Mesimvria entry	Firm	TAP --> DESFA	Yearly	2029/2030 to 2039/40	44,612,000	0

3. Relations to GRIPS, TYNDP, NDPs

- TAP

In line with TAP's exemption decision, TAP is exempted from the requirement to submit Ten-Year Network Development Plans to the NRAs (**TYNDP**) for a period of 25 years as of TAP's Commercial Operations Date (i.e., 15 November 2020). For this reason, TAP has not submitted Network Development Plans (**NDP**) (even for its initial capacity).

In what concerns the EU Ten Year Network Development Plan (**TYNDP 2026**) process, at the moment of the publication of this Demand Assessment Report, only data on the Non-Binding Demand Indications received during the Demand Assessment Phase of the 2023 Market Test had been shared with ENTSOG. Data from the 2025 Demand Assessment Phase had not been shared due to confidentiality reasons and because such information will be made publicly available only via the publication of this DAR. The information shared with ENTSOG for the TYNDP 2026 purposes covers TAP's expansion scenarios as resulting from the 2023 Market Test.

In view of its strategic role, as well as substantial contribution to the security of supply, decarbonization, market integration and competition, the European Commission, the European Parliament and the Council have given TAP's initial project the Project of Common Interest (**PCI**) status in 2013, 2015, 2017 and 2019 for its role, amongst others, in opening up the Southern Gas Corridor, one of the energy corridors identified by the EU as priorities for the achievement of European energy policy objectives.

- SRG

The projects for Snam Rete Gas (also included in the NDP 2025– 2034) that might be considered in the studies are:

- The upgrades of the regulation and measurement plant in Melendugno the project involves the strengthening of the filtering, regulation and measurement sections;
- Regulation plant in Moliterno: the Moliterno regulation plant, located close to the Montesano compression station, will feed the DN 1050 Montesano S.M.-Brindisi gas pipeline, with the aim of regulating/limiting the flows from the station's delivery towards Brindisi/Melendugno;
- Matagiola-Massafra pipeline, increasing the maximum capacity at the entry point in Puglia: The project relating to the "Matagiola – Massafra" methane pipeline is included in the list of projects included in the TYNDP 2024 with the identification code TRA-N-1195 and was included in the fourth PCI list presented by the Commission on 31 October 2019 and in the fifth list published on 19 November 2021.

- DESFA

The only project included in the DESFA draft TYDP 2024-2033 that is relevant to the Non-Binding Demand Indications received for Nea Mesimvria IP is presented below. This project is also included in the TYNDP 2024, and the 5th edition of the Gas Regional Investment Plan (**GRIP**) for the Southern Corridor.

- TRA-F-1278 "Compressor station at Ambelia". The project consists in the installation of a new compressor station at Ambelia (Farsala) in Central Greece which will increase the capacity of the transmission system of DESFA to transport gas from north to south but also, in reverse flow, from south to north.

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

- TAP

The amounts and directions of the demand for incremental capacity considered during the present procedure are the ones represented above in Section A for Forward Firm Capacity. Please note that without further expansion of TAP, no further Forward Firm Long-Term Capacity⁴ can be expected to be accommodated. As an exception to this general point, please note that from 1 January 2029 through 14 November 2045, 32 829 131 kWh/day of residual forward firm long-term capacity is available at entry Kipoi and exit Melendugno (and, subject to constraints at individual IPs and the overall competition constraint, at other TAP exit points).

Given the non-binding demand noted in Section A and the high degree of capacity utilisation noted in Section B, TAP intends to further investigate and define corresponding expansion scenarios in the Coordinated Design Phase.

- SRG

Three expansion scenarios have already been identified during the Coordinated Design Phase of the 2023 Market Test and comprised in the Project Proposal binding phase approved by the Italian (ARERA), Greek (RAE) and Albanian (ERE) NRAs. During the Demand Assessment Phase of the 2025 Market Test, SRG received Non-Binding Demand Indications by the shippers during the 8 weeks until the 1st September 2025, represented above in Section A for Forward Firm Capacity, which may determine further investigations and the definition of additional expansion scenarios. Depending on the results of the technical assessments for this expansion scenario, the existing scenarios, already defined in the 2023 Project Proposal, may also be adapted further.

The capacity requested during the Demand Assessment Phase will be made available for binding bookings in the Binding phase.

More details on the timing of the Binding Phase and on the operational availability of the incremental infrastructure will be comprised in the draft Project Proposal, to be issued for Public Consultation.

- DESFA

The amount and direction of the demand for incremental capacity, at Nea Mesimvria IP, considered during the present procedure is the one presented in Section A “Non-Binding Demand Indications”.

The requested capacity will be studied with regard to the offer levels that will be described in the draft Project Proposal to be issued for public consultation as per the preliminary timeline presented at Section D, after the performance of the respective technical studies.

⁴ According to Section 2 of TAP’s Network Code, **Forward Firm Long-Term Capacity** means Firm Capacity in the TAP Transportation System for the transportation of Natural Gas in the Forward IP Direction that is made available to Shippers under a Gas Transportation Agreement at a particular Interconnection Point on every Gas Day for a period of more than one Gas Year.

C. CONCLUSION FOR THE INITIATION OF AN INCREMENTAL CAPACITY PROJECT/PROCESS

TAP, DESFA and SRG will proceed to the next phase of the 2025 Incremental Capacity process and open the Coordinated Design Phase the day after the publication of this Demand Assessment Report.

During the Coordinated Design Phase, the TSOs deem it necessary to conduct further technical studies to investigate, document and evaluate the preliminary technical solutions, costs, and schedules for development options to meet a range of demand cases.

The output of the technical studies and of the coordinated actions taken by TAP, SRG and DESFA during the Coordinated Design phase, including specific expansion thresholds, provisional costs and timelines, will feed into the draft Project Proposal to be issued for public consultation.

D. PROVISIONAL TIMELINE

The involved TSOs are planning to conduct the technical studies and the consultation of the draft Project Proposal according to the following provisional timeline:

Activity	Expected start	Expected end	Expected duration
Technical studies for incremental capacity projects	26/02/2026	16/04/2026	7 weeks
Public Consultation on draft Project Proposal	17/04/2026	27/05/2026	6 weeks

**Please note that the above stated timeline has a provisional character and may therefore be subject to change.*

Following the end of the public consultation and further refinements of the draft Project Proposal, the TSOs plan to submit the draft Project Proposal to the relevant NRAs for coordinated approvals. Upon approval of the Project Proposal by the NRAs, the TSOs plan to start the Binding Phase with the publication of a joint notice on the TSOs’ website 2 months before the Binding Bidding Window. The process and preliminary timeline for the Binding Phase will be further detailed in the draft Project Proposal, including indicative schedule information building on the studies from the Coordinated Design phase.

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

N/A

F. FEES

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

For the incremental capacity cycle addressed by this report, in compliance with the provisions of the Guidelines, TAP has requested fees for the evaluation and processing of the Non-Binding Demand Indications received in the value of 10,000 EUR/interested party.

SRG and DESFA do not currently charge fees as foreseen by Article 26.11 of CAM NC.

G. FURTHER COSTS

- TAP – other fees

TAP reserves its right to introduce in the draft Project Proposal, that will be published for public consultation, a framework where financial guarantees and/or fees could be requested from any party that shows interest in underpinning relevant pre-investment.

- SRG

SRG reserves the right to request a fee from the entities that submitted non-binding indications after the project finalization and before the submission of the Project Proposal to the NRA, subject to approval of the relevant NRA.

- DESFA

DESFA reserves the right to request a fee from the entities that submitted non-binding indications after the project finalization and before the submission of the Project Proposal to the NRA, subject to approval of the relevant NRA.

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