

**Dear business partners,**

*Together, we have navigated the year 2025, marked by ongoing geopolitical changes affecting also the regional gas markets. Nonetheless, our commitment to providing a robust and reliable transit infrastructure remains steadfast. Despite significant changes in European gas import routes, the Czech Republic has maintained its position as a stable and resilient market, supported by strong infrastructure and effective use of storage capacities.*

*At NET4GAS, we remain fully dedicated to offering our shippers dependable and sufficient capacity at a competitive price, supporting the energy needs of the Czech Republic as well as downstream markets throughout Central and Eastern Europe.*

*In this edition, we present an overview of recent system usage and capacity reservations across our natural gas infrastructure. You will also find an update on the 2026 price decision published by the Czech national regulatory authority, an overview of the recent amendment to gas infrastructure legislation issued earlier this year by the Czech government and a progress report on hydrogen infrastructure development.*

*As part of our commitment to the energy transition, NET4GAS is pleased to announce a series of online workshops dedicated to the development of hydrogen infrastructure. To view the official schedule and confirm your attendance, please refer to the H2 Workshops section below.*

*Thank you for your continued cooperation and trust in our mission. We hope you find this newsletter informative and wish you all the best for a successful year 2026.*



**Eduard Klíma**, Specialist of Commercial Management

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### 2025 GAS TRANSMISSION STATS

**11.21 bcm**

Overall Transported Volume

**1.29 bcm**

Transit to Foreign Markets

## 2025 Transport Review: Transit Revival

- **Transit flows surged in 2025, with high volumes both to Slovakia and Poland, reinforcing the Czech system's strategic role in CEE.**
- **VIP Brandov proved highly reliable, hitting peak flows nearly twice the firm (FZK) exit capacity in Germany.**
- **Significant firm capacity at VIP Brandov remains available, with further enhancements planned for 2026.**

### MARKET

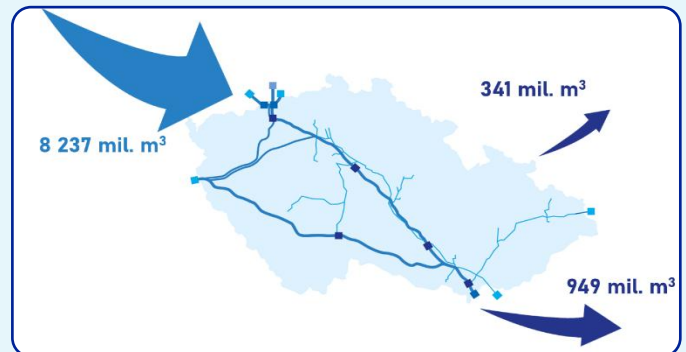
Compared to 2024, gas flows shifted dramatically. All imports originated from Germany, driven by the removal of the German storage levy and the halt of transit via Ukraine, reinforcing the Czech Republic's position as a key transit hub for Central and Eastern Europe. This change drove a revival of transit to Slovakia and also robust flows to Poland.

Although Czech transmission capacity remains sufficient, firm (FZK) exit capacity from Germany at VIP Brandov is still limited to around 270 GWh/d. Nevertheless, VIP Brandov proved its strategic importance in 2025, achieving record flows in July of nearly 500 GWh/day, i.e. almost double of the declared German technical capacity. This performance underscores the reliability and operational readiness of the interconnection point, which has operated without interruption since 2023.

At the Czech–Slovak border, the reversal of flow direction marked a key development. While 2024 saw imports from Slovakia, **2025 brought strong transit toward Slovakia and beyond, with daily flows peaking at approx. 170 GWh in December.**

Transit demand at Český Těšín also surged. Since April, utilization toward Poland averaged 94 %, **with a record 37 GWh/day in December**, enabled by cooperation with GAZ-SYSTEM and operational technical capacity upgrades.

Overall, **more than 11.21 bcm** (at 15 °C, 101.325 kPa) of gas was transmitted by our system in 2025, marking a 29 % increase compared to 2024. Alongside entry volumes, deliveries to storage facilities and transit flows, primarily to Slovakia, rose sharply, with the overall transit volumes to foreign markets **reaching 1.29 bcm.**



Gas Imports from and Exports to CZ

### Looking Ahead to 2026

VIP Brandov remains a critical gateway to the CEE region. Despite limited **technical exit capacity in Germany, up to 110 GWh/d remains available for the rest of Gas Year 2025/26, and above 200 GWh/d is yet unsold from Gas Year 2026/27 onwards.** Additional capacity shall be unlocked with the expected commissioning **of the new German Compressor Station Rehden 2** by end of 2026, and further capacity expansion is planned for 2028.

These developments ensure sufficient capacity to meet Czech and regional market needs. Based on auction results and recent flow trends, we are glad that the Czech system's west-east transit role is expected to continue in the coming year.

*Eduard Klíma*

## Price Decision for the Calendar Year 2026

- **Firm gas storage transmission tariffs remain unchanged at zero, the variable fee for border points has been reduced.**
- **Competitiveness of the Czech transit route to Lanžhot strengthened following the June 2025 price decision.**

### PRICES

On 27 November 2025, the Energy Regulatory Office (ERO) released *Price Decision No. 12/2025*, establishing transmission tariffs for the calendar year 2026. The decision sets tariffs for virtual gas storage points, including cross-border storage facilities, and the variable transmission price for border exit points. It specifies regulated prices for distribution system operators and customers directly connected to the NET4GAS transmission system. The decision became effective on 1 January 2026.

Key changes include:

- **Variable price for natural gas transported at Czech exit border points decreased by approximately 56 % to  $0.0009 \times C_{OTE}$ , based on the OTE Index published by the Czech gas market operator.**
- **Fixed transmission tariffs for virtual gas storage (TSO entry and exit) remain at 0 CZK/(MWh/d)/y.**
- **Variable price for TSO exit to virtual gas storage are reduced from 1.74 CZK/MWh to 0.76 CZK/MWh.**

This update follows *Price Decision No. 2/2025*, issued on 3 June 2025, which set fixed regulated prices for border points for 2026. Following this price decision, transit costs through the Czech system toward Slovakia decrease, with the 2026 annual exit tariff at Lanžhot set at approx. 3,600 CZK/MWh/d/y (around 0.41 EUR/MWh if fully utilized under an annual contract), creating stronger incentives to use this route for broader CEE deliveries.

For full details, please refer to the official Price Decision on the [ERO website](#) or visit [NET4GAS](#).

*David Urban*

## NET4GAS Continues to Develop the Czech Hydrogen Infrastructure and International Hydrogen Corridors

- NET4GAS is building a Czech hydrogen backbone to position the Czech Republic as a key European hydrogen hub and cooperating with international partners on development of four hydrogen corridors.
- The NET4GAS' Czech Hydrogen Backbone West and North projects are included in the Projects of Common Interest (PCI) list.

### H2

NET4GAS is advancing the development of the Czech hydrogen infrastructure and, together with international partners, is progressing several cross-border hydrogen corridors. Owing to its central European location, the Czech Republic is well positioned to become an important hub within the emerging European hydrogen network.

NET4GAS is involved in four international corridor initiatives: *Czech-German Hydrogen Interconnector (CGHI)*, *Central European Hydrogen Corridor (CEHC)*, *SunsHyne Corridor* and *South-East European Hydrogen Corridor (SEEHyC)*. These projects aim to link major hydrogen production regions with key demand centres across Europe.

Within the Czech Republic, selected existing gas pipelines will be repurposed for hydrogen transport, ensuring efficient connections to neighbouring markets while supporting domestic industrial demand.

As part of the Czech Hydrogen Backbone Infrastructure, NET4GAS is preparing the West and North routes, enabling bidirectional transmission of pure hydrogen and strengthening connectivity between Central, Western and South-Eastern Europe.

Preparatory activities are progressing at full speed; material testing has been completed and building permit applications for the first project will be submitted already in 2026. Commissioning of the **Czech Hydrogen Backbone Infrastructure – West** project is planned for **2031**, followed by the **North** route in **2032**.



Czech Hydrogen Backbone Infrastructure

The importance of these projects was confirmed by **their inclusion on the new list of Projects of Common Interest (PCI) in December 2025**. Both routes are designed with a planned bidirectional capacity of 144 GWh per day.

Within the CGHI corridor, a **high-level ministerial working group** has been established, comprising representatives of the **Czech Ministry of Industry and Trade, the German Federal Ministry for Economic Affairs and Energy, both national regulatory authorities, and the transmission system operators in the Czech Republic (NET4GAS) and Germany (Gascade, OGE and NaTran Deutschland)**. The group's objective is to jointly design and implement solutions for future cross-border hydrogen transmission, covering technical, legislative, regulatory and economic aspects.

*“Our company is actively involved in the development of a reliable cross-border hydrogen infrastructure. We are part of the Czech-German Hydrogen Interconnector (CGHI) initiative, which is preparing a project to interconnect the hydrogen transmission systems of the Czech Republic and Germany,”* said Michal Slabý, CEO of NET4GAS, commenting on the newly emerging high-level Czech-German ministerial working group.



Co-funded by  
the European Union

Lenka Krausová  
Karin Stehlik

## H2 Workshops

- Available dates: 18 March 2026 and 31 March 2026

### WORKSHOP

As the development of hydrogen corridors continues successfully and is translating into concrete measures, **NET4GAS is offering online workshops** for stakeholders interested in up-to-date information on Czech and European hydrogen corridors, as well as potential opportunities for cooperation in hydrogen-related projects. During these workshops, NET4GAS specialists will present individual projects and international corridors, explain transmission options and discuss suitable applications.

The first online workshop will take place on 18 March 2026, followed by a second online workshop on 31 March 2026. All registered participants will receive an email invitation well in advance of each workshop.

REGISTER HERE

Lenka Krausová  
Karin Stehlik

## New Czech Legislation Accelerates Decarbonization of the Energy Sector

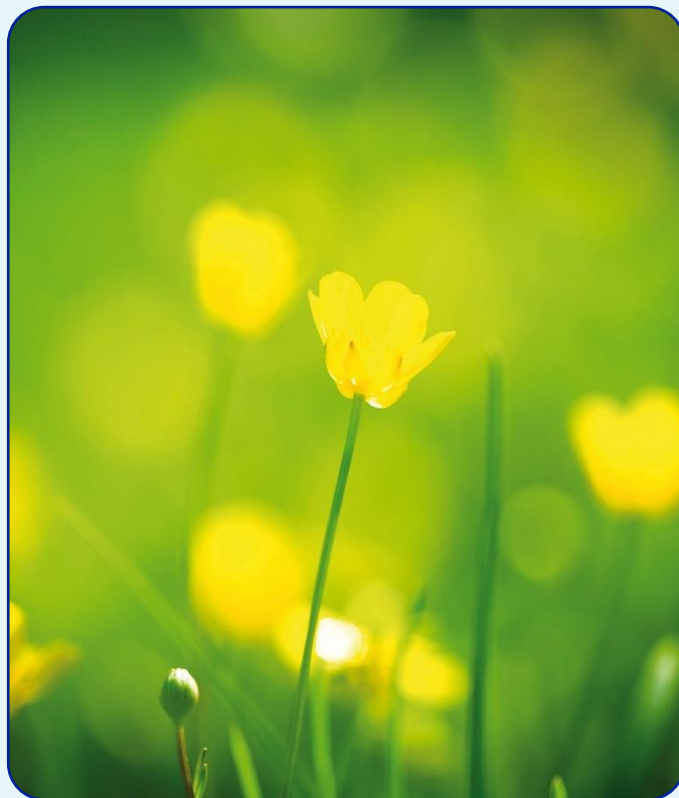
- In 2025, amendments to the Energy Act, the Line Act and to the Act on Accelerating the Construction of Strategically Significant Infrastructure have been adopted to enable the faster construction of gas infrastructure, thereby strengthening the energy resilience of the Czech Republic.

### LEGISLATION

The amendments support the decarbonization of the Czech energy sector by enabling faster development of gas-fired power generation, including CCGT plants, and the modernization of the heating sector. They simplify and accelerate permitting and expropriation procedures, which is critical for new energy infrastructure projects.

For NET4GAS, domestic applicants, and the Czech Republic's energy security, the most important changes concern statutory time limits and expropriation rules. The legislation also significantly shortens construction timelines for pipelines and transmission facilities, helping to modernize the energy sector and accelerate the transition from coal to lower-emission gas.

*Eduard Klíma*



## Planned maintenance work of NET4GAS infrastructure

Please find below a brief overview of the currently planned maintenance up to April 2026. All and complete planned maintenance work and consequent firm capacity interruptions at all entry and exit points of NET4GAS infrastructure for every gas day are available on our [website](#). The final maintenance plan is announced 42 days in advance in line with legislation.

### Entry points

Month	Entry point	Technical capacity [GWh/d]	Maximum daily interruption [GWh/d]	Maximum available daily firm capacity [GWh/d]
January 2026	No planned maintenance			
February 2026	VIP Brandov	2,427.582	115.201	2,427.582
March 2026	VIP Brandov	2,427.582	202.085	2,312.381
April 2026	VIP Brandov	2,427.582	475.300	2,312.381

### Exit points

Month	Entry point	Technical capacity [GWh/d]	Maximum daily interruption [GWh/d]	Maximum available daily firm capacity [GWh/d]
January 2026	No planned maintenance			
February 2026	No planned maintenance			
March 2026	No planned maintenance			
April 2026	No planned maintenance			

The last two columns show the maximum daily interruption and the maximum available daily firm capacity in a given month during maintenance, i.e. in case the maintenance affects infrastructure only during some days of the month, the maximum available daily firm capacity equals the whole technical capacity.

## Upcoming auctions of NET4GAS capacities

All upcoming auctions can be found in the auction calendar on the *PRISMA* platform. Find all monthly and quarterly auctions to be published in the coming months in the table below:

Publication date	Auctions start	Auction type	Product runtime	Capacity types
19 January 2026 9:00	2 February 2026 9:00	Quarterly	1 April 2026 – 1 October 2026	Firm
9 February 2026 9:00	16 February 2026 9:00	Monthly	1 March 2026 – 1 April 2026	Firm
17 February 2026 9:00	24 February 2026 9:00	Monthly	1 March 2026 – 1 April 2026	Interruptible
23 February 2026 9:00	2 March 2026 9:00	Quarterly	1 April 2026 – 1 October 2026	Interruptible
9 March 2026 09:00	16 March 2026 09:00	Monthly	1 April 2026 – 1 May 2026	Firm
17 March 2026 09:00	24 March 2026 09:00	Monthly	1 April 2026 – 1 May 2026	Interruptible
13 April 2026 09:00	20 April 2026 09:00	Monthly	1 May 2026 – 1 June 2026	Firm
14 April 2026 9:00	21 April 2026 09:00	Monthly	1 May 2026 – 1 June 2026	Interruptible
20 April 2026 9:00	4 May 2026 9:00	Quarterly	1 July 2026 – 1 October 2026	Firm
25 May 2026 9:00	1 June 2026 9:00	Quarterly	1 July 2026 – 1 October 2026	Interruptible

Daily auctions for firm capacity always start at 4:30 PM on the day before the gas day, and the auctions for interruptible capacity always start at 5:30 PM on the day before the gas day. Within-day auctions start at 7:00 PM on the day before the gas day. Bidding windows open at the start of an auction and start every hour  $H$ , with bids to be placed for the remaining part of the gas day starting at hour  $H+4$ .