

Accelerating a Europe-wide CO₂ Storage Market

CO₂necting Europe Conference 2025



**The CCSA is the European trade association
accelerating the commercial deployment of
Carbon Capture, Utilisation and Storage (CCUS)
through advocacy and collaboration**



CCSA members

CO₂ Storage



Power & Industrial



Carbon Capture Developers



Engineering & Equipment



CO₂ Transport & Distribution



Financial, Consulting & Others

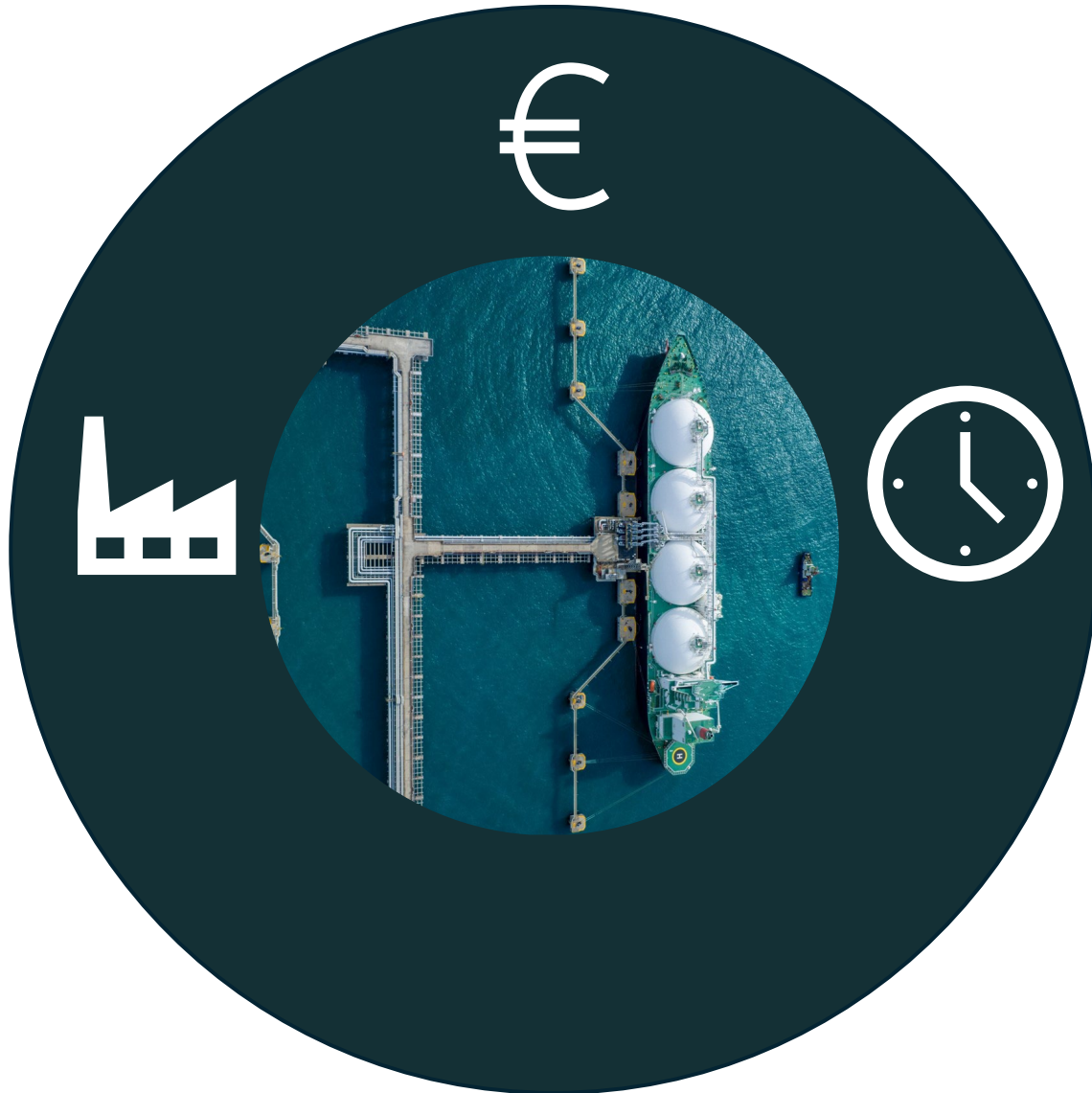


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Stefano Miriello - Head of EU
External Affairs, CCSA

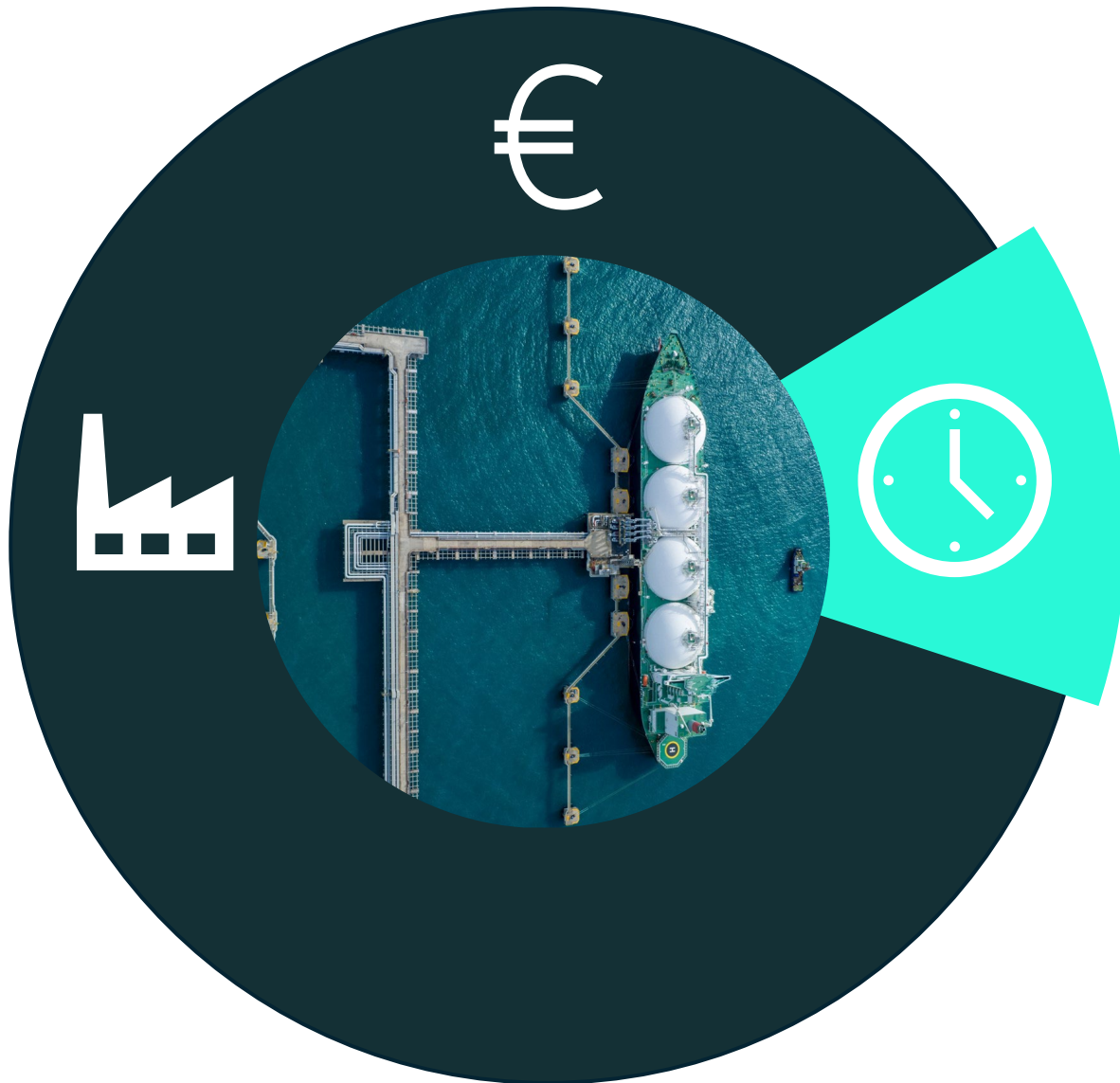


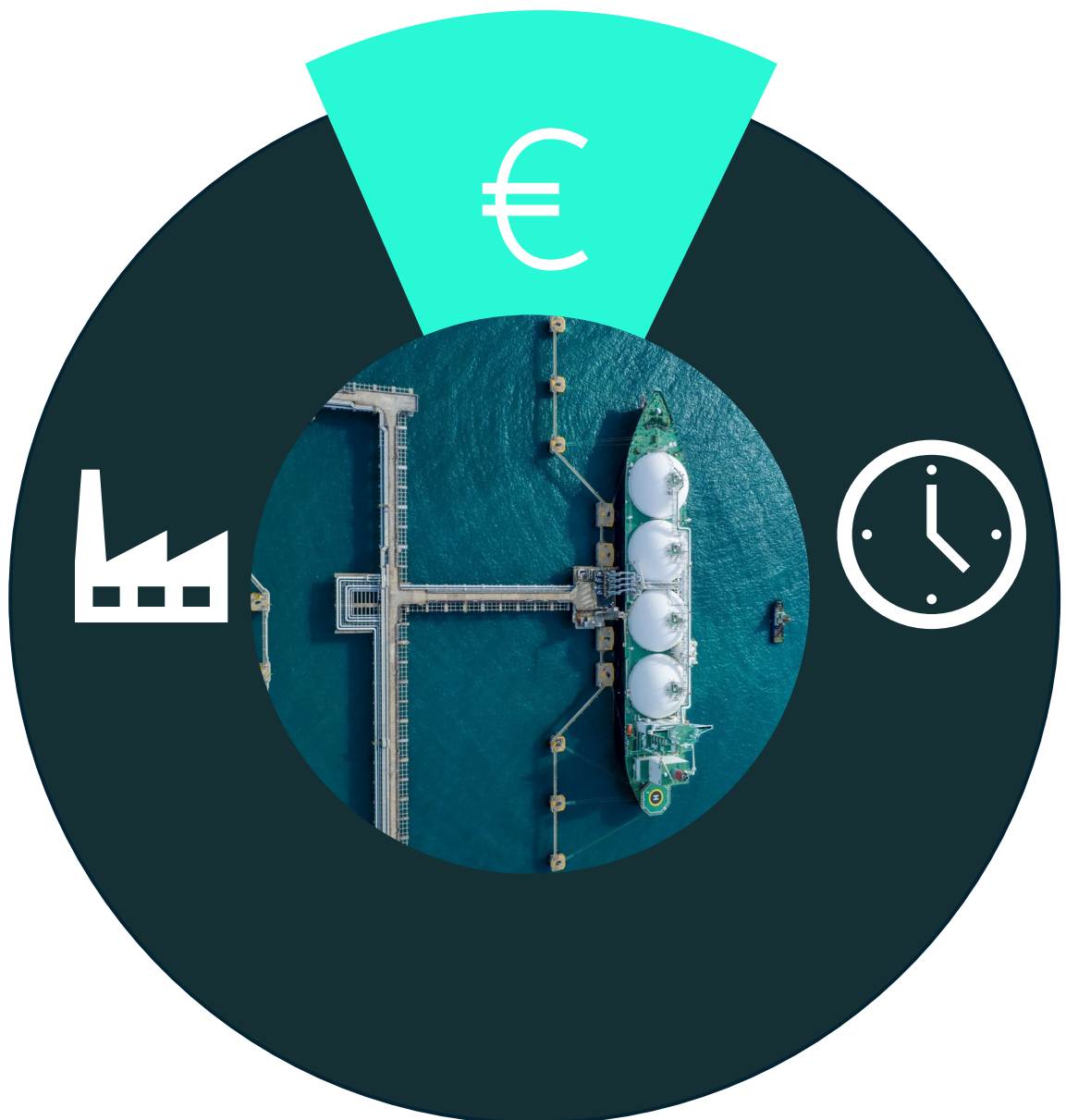
Why enabling the transport and storage of captured CO2 between the European Union/European Economic Area and the United Kingdom?



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**Crucial to
effective and
timely
emissions
reduction**

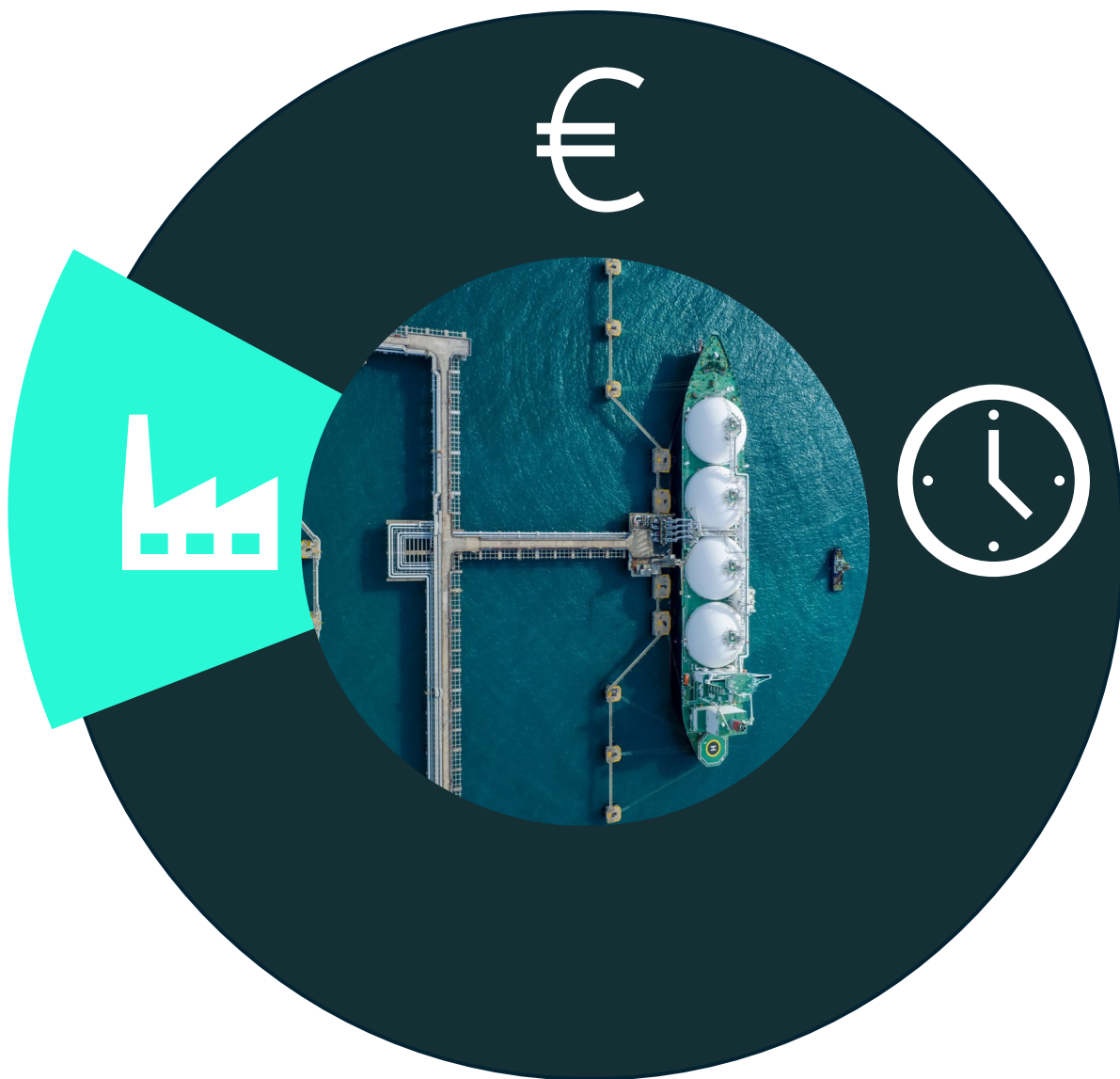




Why enabling the transport and storage of captured CO2 between the European Union/European Economic Area and the United Kingdom?

**Reduce the
cost of
reaching net
zero**





Why enabling the transport and storage of captured CO2 between the European Union/European Economic Area and the United Kingdom?

Support industrial players in decarbonising and staying competitive in Europe



Report's outcomes

01

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Any delay in enabling this storage market would lock emitters into higher-cost storage





Recommendations

01

EU-UK Trade and Cooperation Agreement

Equivalence or recognition
of the CCS permitting
regimes

Supplementing agreement
under the TCA to contain
CCS regime minimum
criteria, Governance Body
and Dispute resolution
mechanism

Recommendations

02

EU and UK legislation – ETS

ETS Directive - Article
12(3a)

Amend the Monitoring and
Reporting Regulation

Changes to UK legislation

Recommendations

03

Further legislative considerations

CO₂ stream specification standard

CO₂ metering standards

Third-party access
Infrastructure and facilities
between the UK and the EU

Recommendations

04

London Protocol

Procedural formality to overcome

Notifications and agreements or arrangements

Recommendations

Economic Modelling



CCSA



XODUS

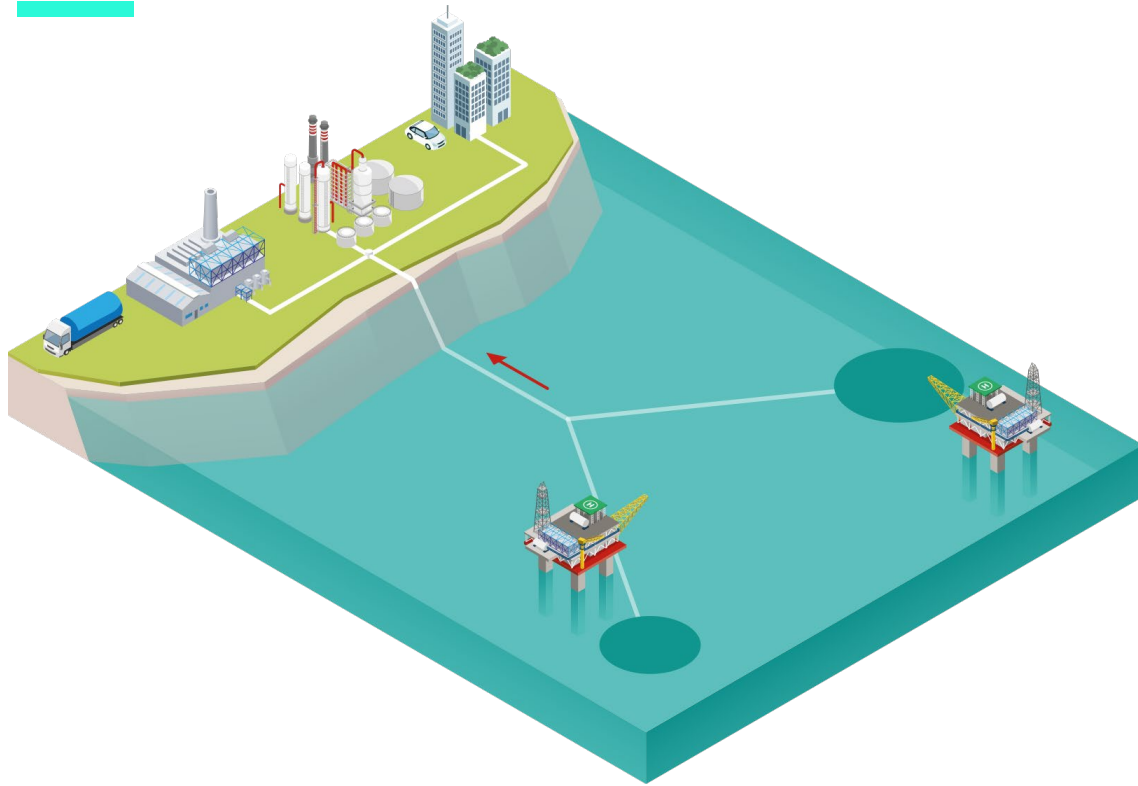
Introduction

- Xodus has worked with the CCSA on an economic modelling on the transport and storage of CO2 in Europe (EU-EEA-UK).
- This research aims to understand the economic benefits, specifically in terms of tariffs, for emitters seeking to transport and store CO2 between the UK and the EU-EEA.
- The work builds upon Xodus' 2023 research forecasting CCUS infrastructure development through 2050.



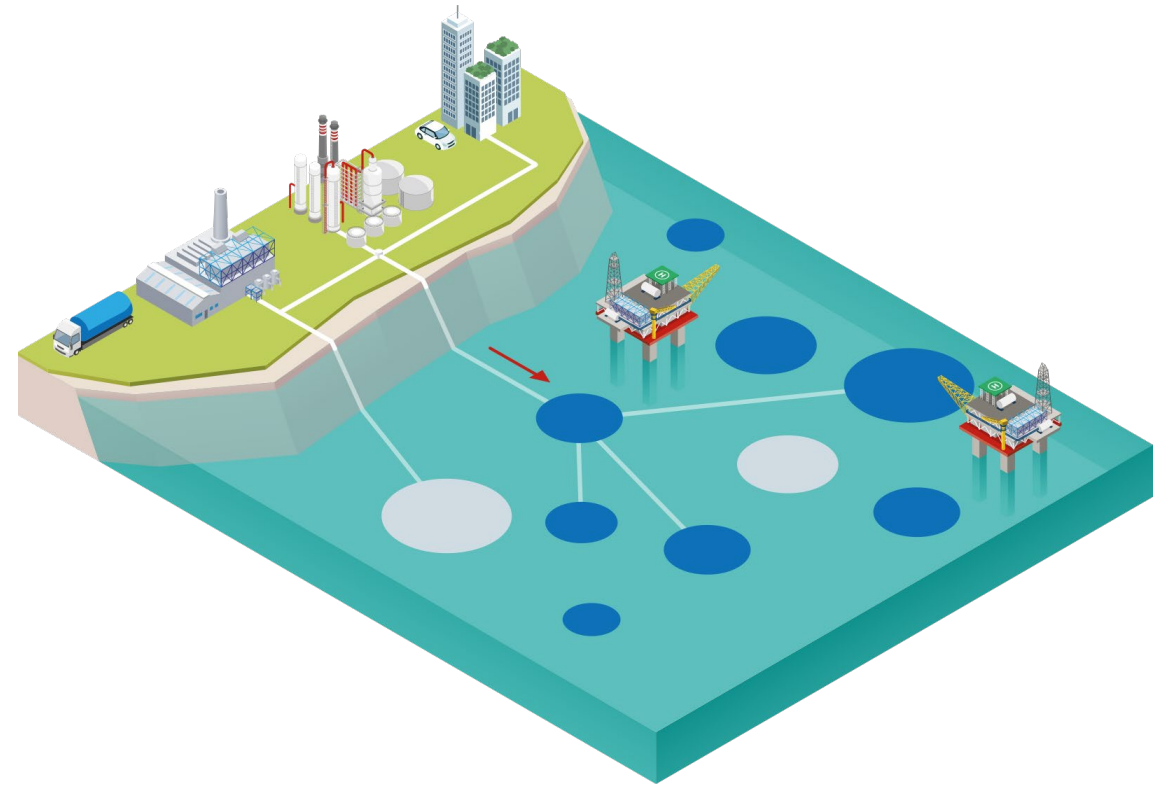
We would also like to thank the Joint Research Centre (JRC) for their support and for providing the onshore dataset used in the 'Shaping the Future CO2 Transport Network for Europe' project, which has been essential to this study.

CCUS Transport & Storage



Natural Gas Infrastructure

We know the location of **both** the consumers and production fields

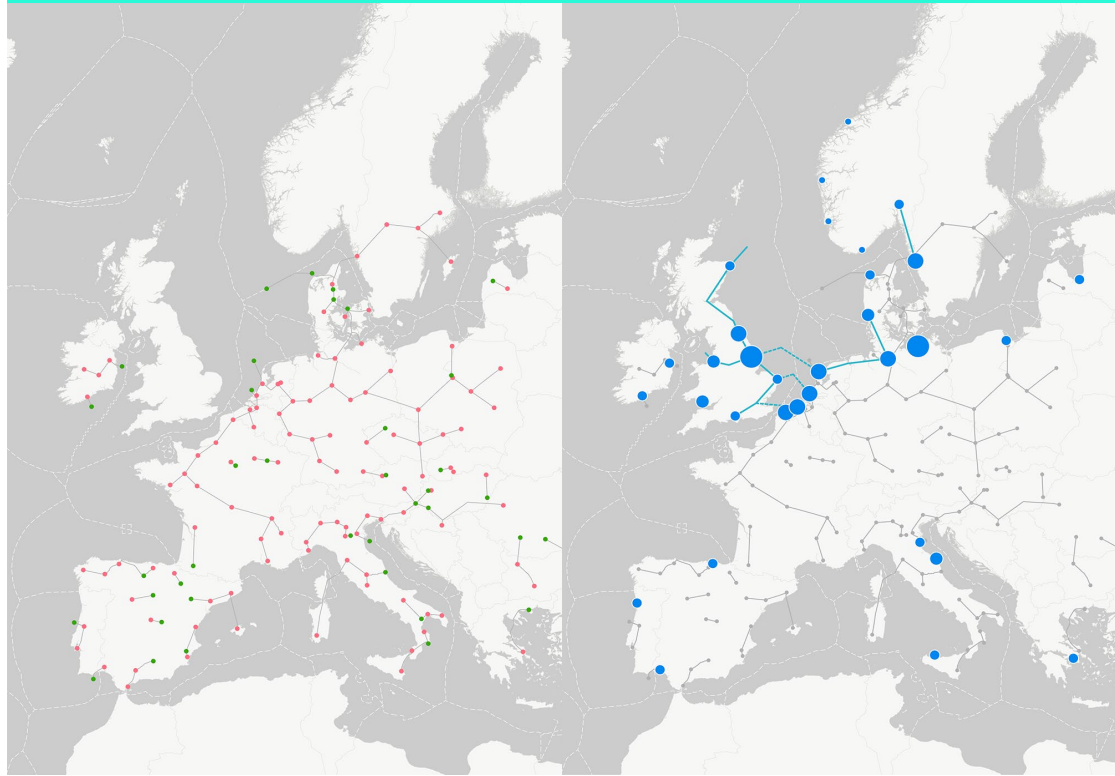


CCUS Infrastructure

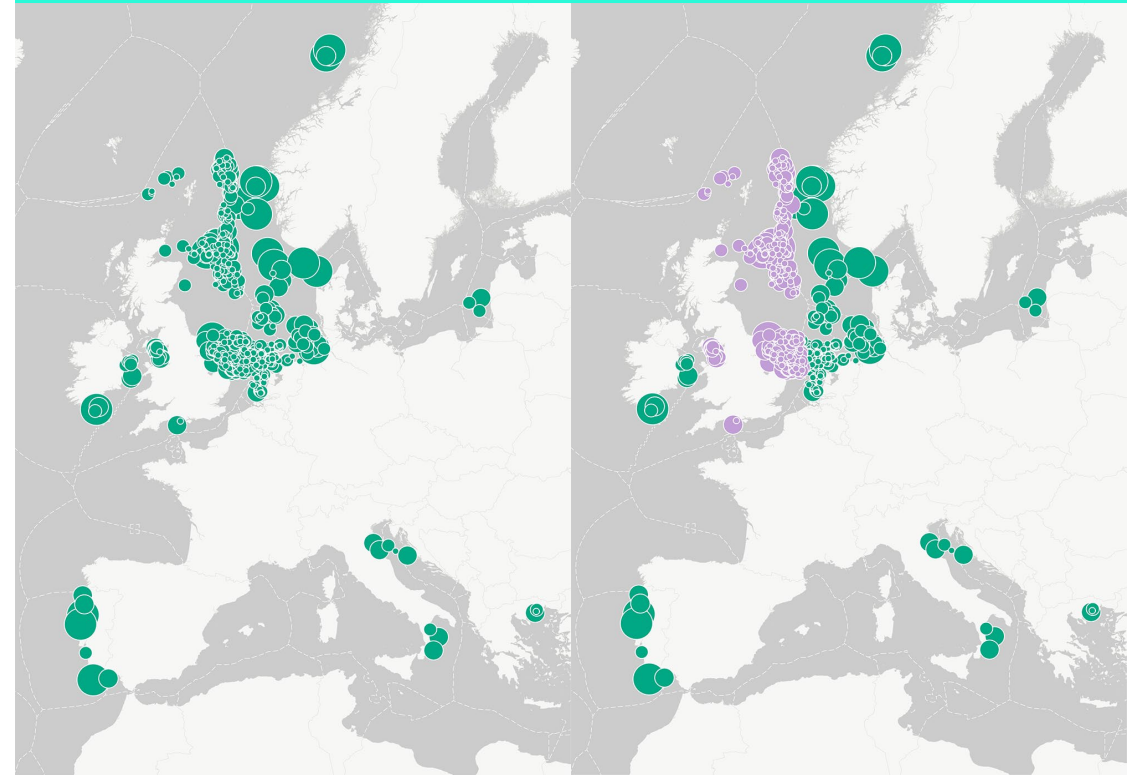
We know the location of the emitters but can **use** a wide range of storage options

Optimising CCUS Transport & Storage Infrastructure

Demand - 243 MTPA by 2040



Supply - 506 offshore storage options

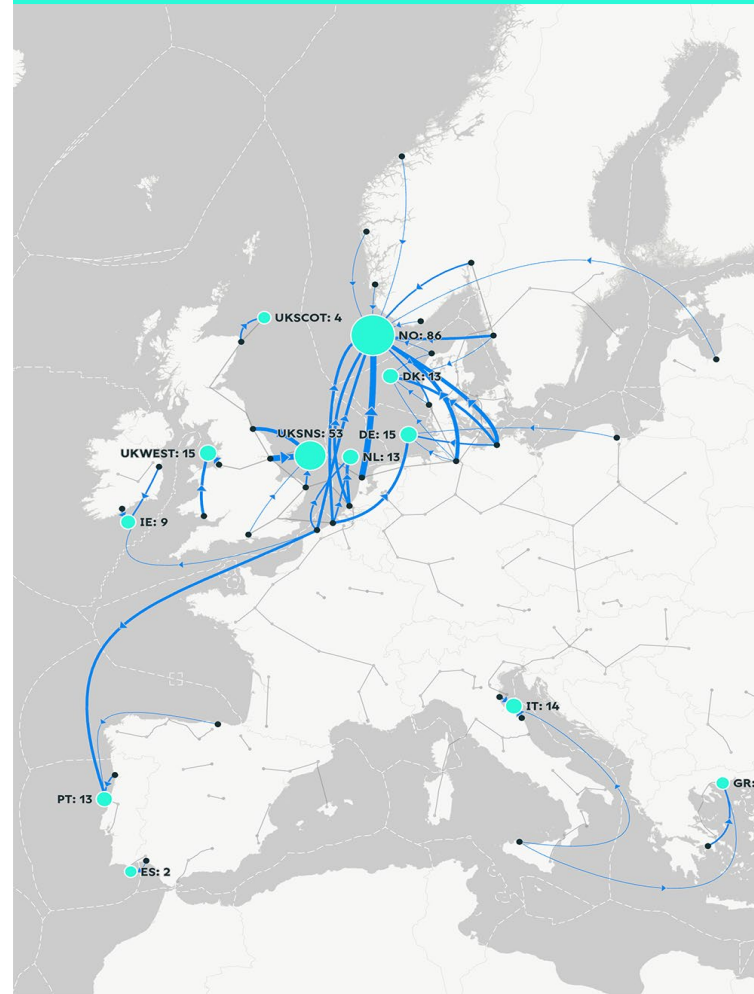


Source – JRC

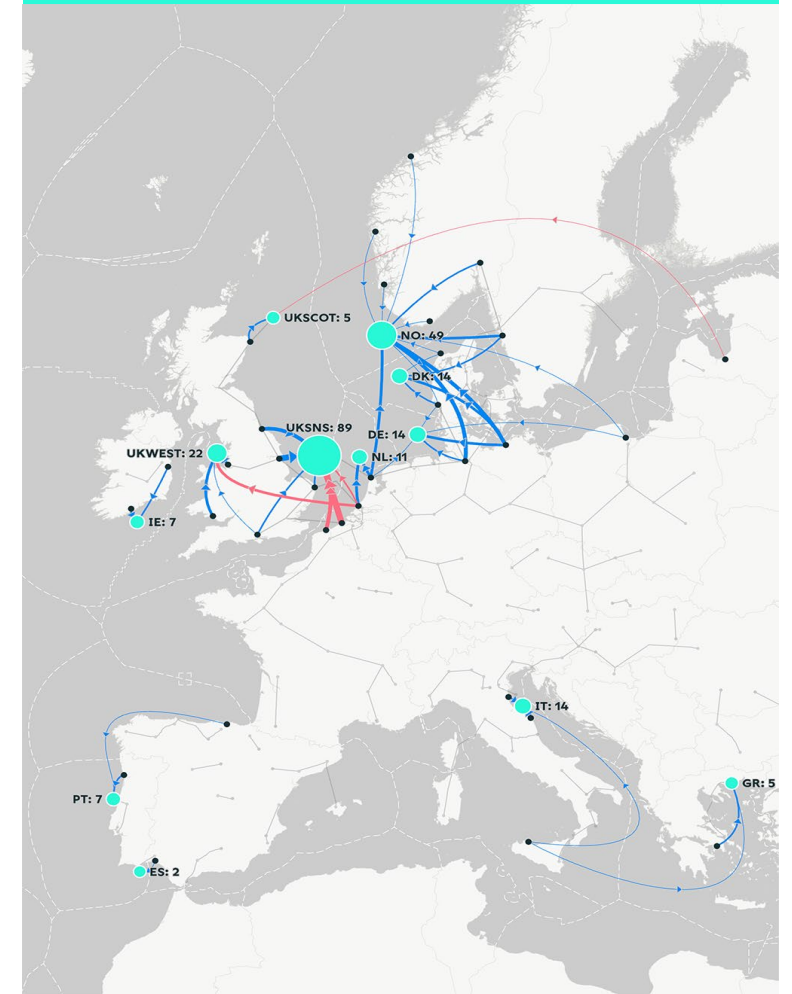


Economic Model Output in 2040 – CO2 Flows

No Cross Border - €52 per tonnes



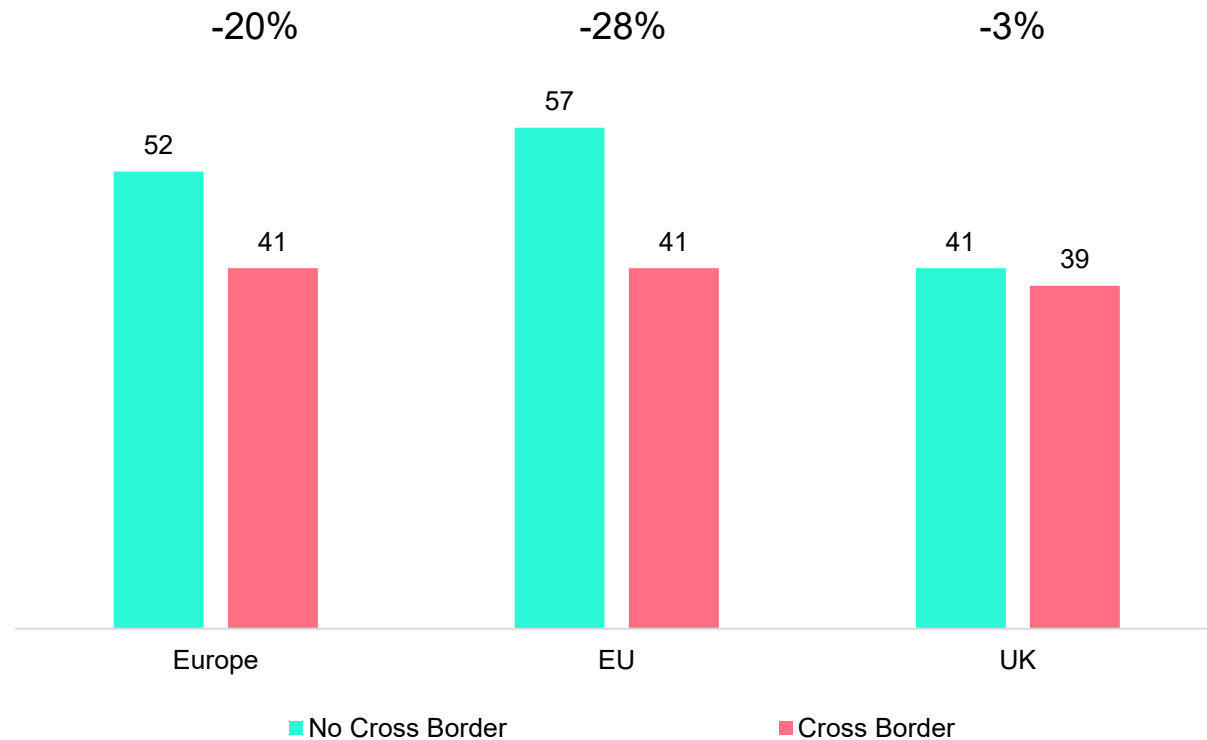
Cross Border - €41 per tonnes



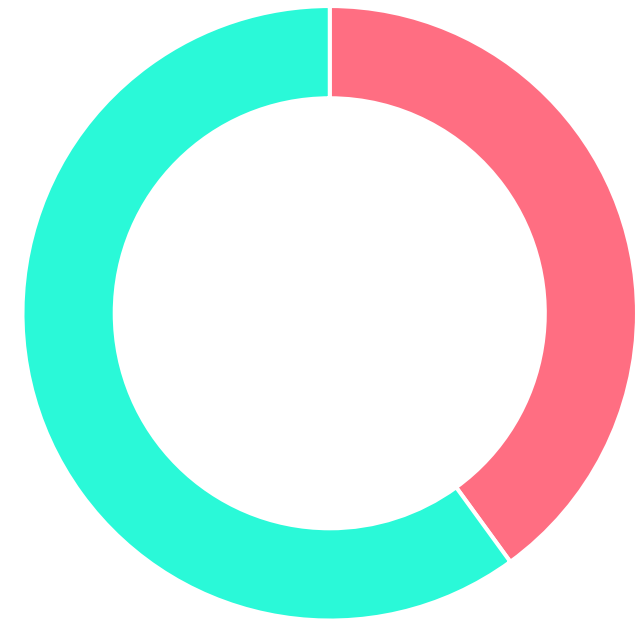
Economic Model Output 2040 - €11/tonne tariffs reduction

€2.7bn annual saving by 2040

Cost saving (€/tonnes)



- 40% saving from network benefit
- 60% saving from reducing distance



Economic Model Output 2040 – 44MTPA Volume Switch

