

CCSA EU CO₂ Storage Working Group

08/05/2025



Housekeeping

- Meeting is being recorded, slides and recording will be circulated with members
- CCSA Competition Law Policy notice is available on the CCSA website
- If you are not speaking, please mute your microphone
- Please **raise your hand** if you wish to comment, you will be invited to come off of mute, if you can also turn on your camera
- Please also pose any **comments in the chat** and these will be picked up by the secretariat

Agenda

| | Time | Topic | Speaker |
|----|------------|---|------------------|
| 1. | 16:00 CEST | Intro | CCSA Secretariat |
| 2. | 16:05 CEST | Welcome to new WG structure | CCSA Secretariat |
| 3. | 16:15 CEST | Strategy, next actions, and Delivery Plan | CCSA Secretariat |
| 4. | 16:30 CEST | Discussion | All |
| 4. | 16:50 CEST | AOB & conclusion | CCSA Secretariat |

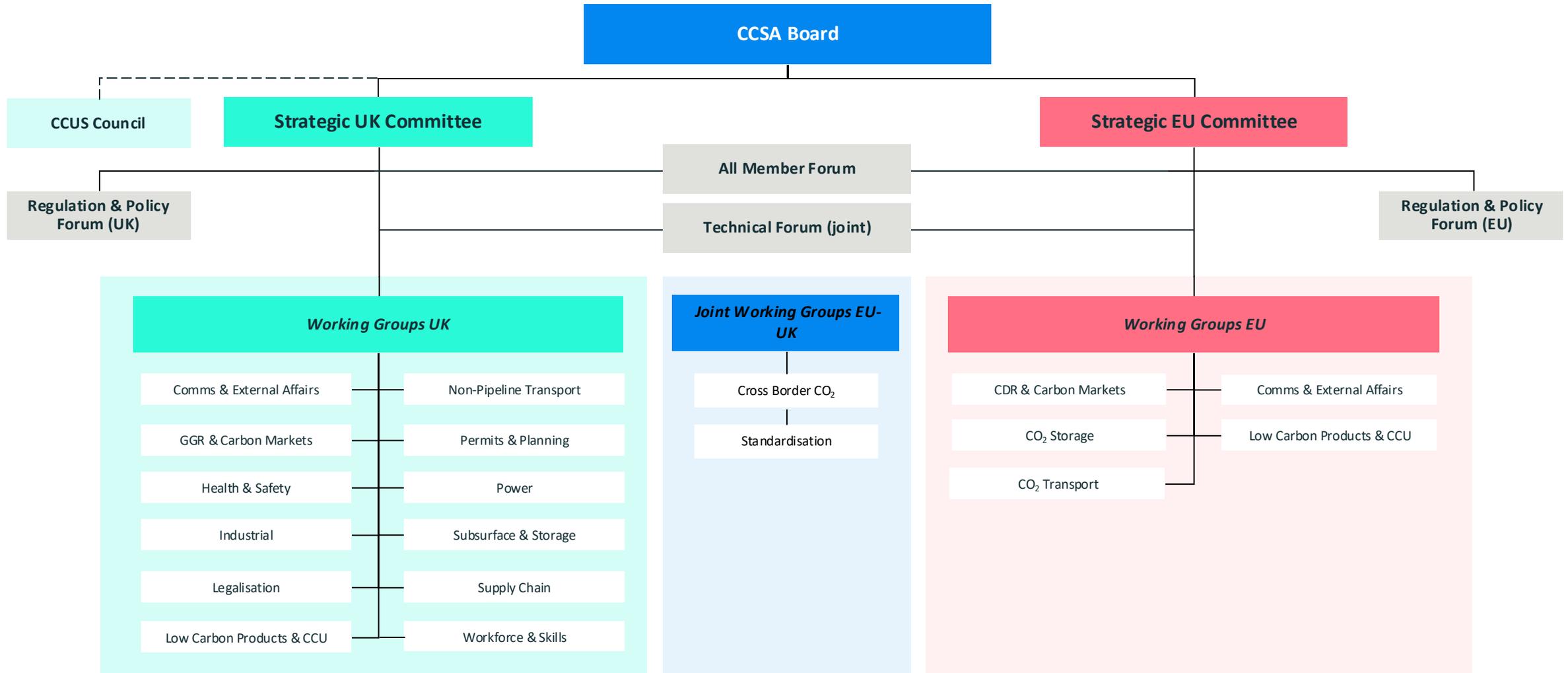


Welcome to new WG structure

CCSA Secretariat



Committees, Working Groups & Forums Structure



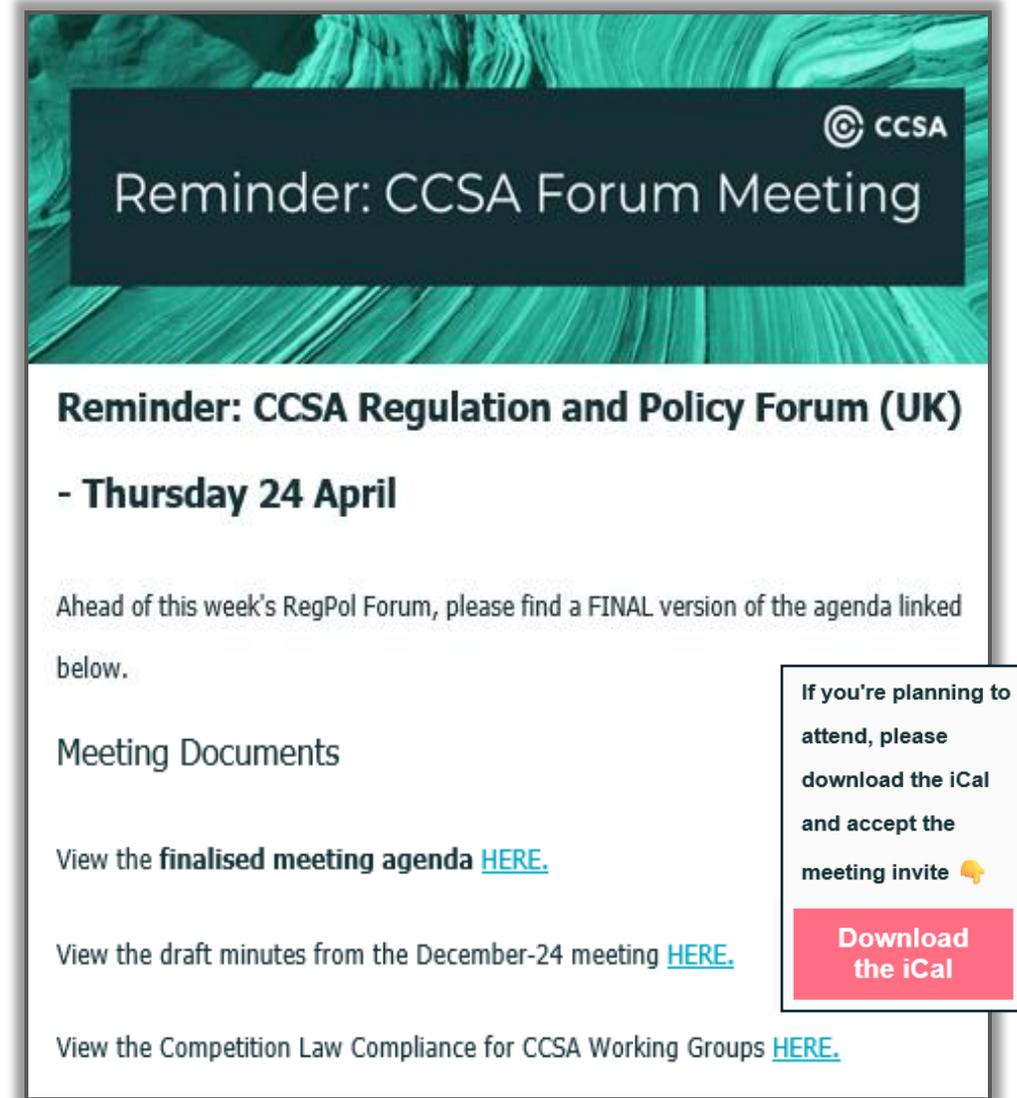
New CCSA Working Group Structure

We are changing the way we send CCSA Working Group & Forum email and invitations (HubSpot), allowing members to opt in and out of meetings and distribution lists.

- ✓ Please ensure you add the new additional domain to your safe sender list in your email platform: email.ccsassociation.org
- ✓ Going forward we ask members to download the iCal file from our emails and add it to your calendar

Carbon Capture & Storage Association, (CCSA), London, Brussels

[Unsubscribe](#) [Manage preferences](#)



The screenshot shows an email reminder with a teal background. At the top right is the CCSA logo. The main heading is "Reminder: CCSA Forum Meeting". Below this, it specifies "Reminder: CCSA Regulation and Policy Forum (UK) - Thursday 24 April". The body text says: "Ahead of this week's RegPol Forum, please find a FINAL version of the agenda linked below." It then lists "Meeting Documents" and provides three links: "View the finalised meeting agenda [HERE.](#)", "View the draft minutes from the December-24 meeting [HERE.](#)", and "View the Competition Law Compliance for CCSA Working Groups [HERE.](#)". On the right side, there is a callout box with the text: "If you're planning to attend, please download the iCal and accept the meeting invite 📧". Below this callout is a red button that says "Download the iCal".

How will it work

- **WG meetings** to be held as and when required with a minimum of 3 meetings per year and an active workplan. Recordings and notes will be shared via HubSpot. Inactive Working Groups will be disbanded, and new groups – as well as time-limited project-specific groups - can be established to reflect changing work priorities.
- **Terms of Reference:** each WG will agree ToR to set out a workplan/key strategic priorities and deliverables for each group annually, as well as terms of engagement for WG members who will be expected to actively participate in the group.
- **Co-chairs:** each WG will have 3 co-chairs.



Strategy & next actions

CCSA Secretariat



Next actions:

- Select co-chairs: in case of interest, inform me by May 16 – first come, first served
- Review Terms of Reference (ToR): it will be shared soon

Ideas for future workstreams:

- EU Delivery plan: to provide data on your CCUS projects in Europe

[Link to the survey](#)

- Consultation on NZIA: CCSA response to the consultation on carbon storage – oil and gas producers' contributions to the EU's 2030 storage objective
 - Lack of transparency on the small producer threshold
 - Unrealistic implementation timelines regarding the production data
- Storage gap: shortage of CO₂ Storage capacity in Europe, based on the disparity between planned CO₂ storage projects and capture projects being developed by industrial emitters
 - Storage licenses in EU?
 - Cross-border projects & capacity



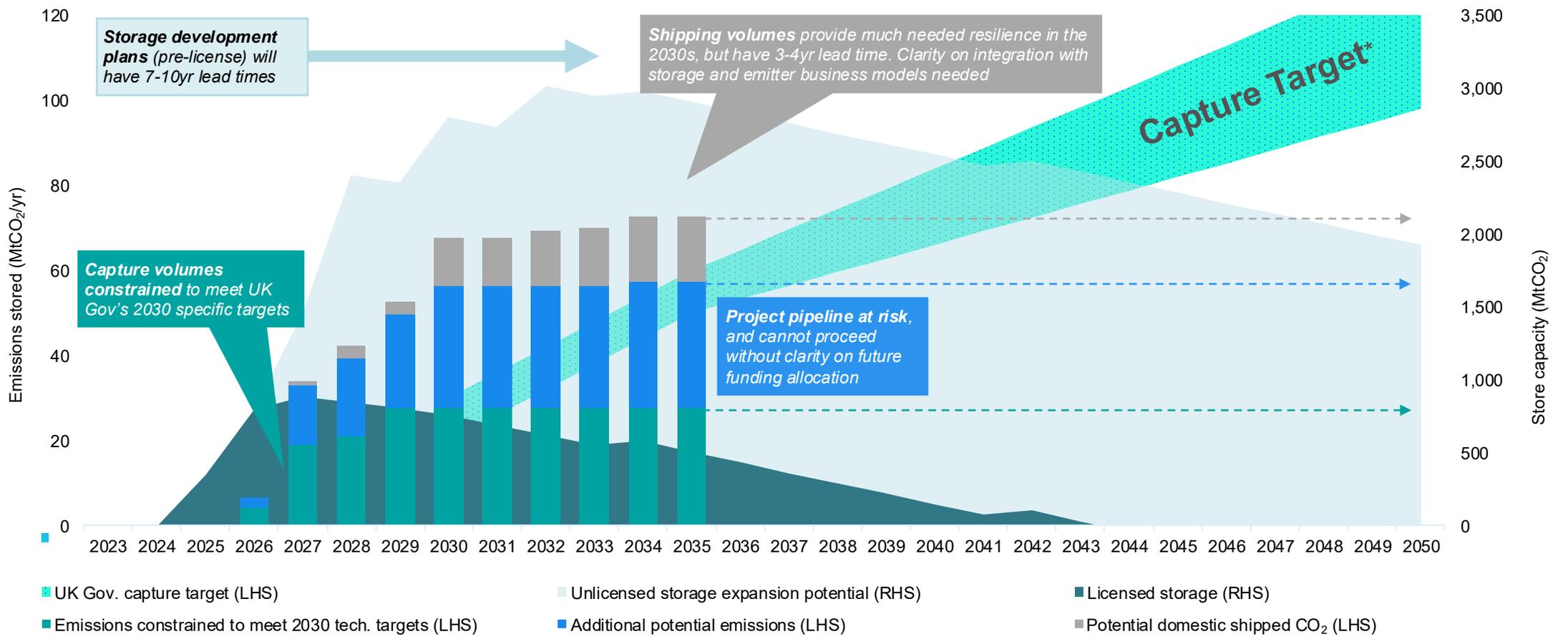
CCUS Delivery Plan

Rebecca Bell
CCSA



Unconstrained, industry has the potential to deliver a pipeline of storage and emitter projects that meet the 2035 target

Constrained and additional emitter volumes and store capacity over time



Notes: Emitter and storage data based on a mixture of publicly available information and information from projects. The timelines shown are indicative and based on an expedient Track-2 process launching this year, potential for FID in 2024 and operational in 2027. Licensed store capacity includes all licensed stores for both Track-1 clusters and other clusters. Unlicensed storage includes store volumes where license applications have been submitted, high confidence storage with a licence pending, or where approvals for licence expansion are required. Capture targets in 2030 and 2035 based on Net Zero Strategy; for 2050 targets refer to CCC targets, showing a range between the 'Tailwinds' and 'Widespread Innovation' scenarios

Key findings



Industry has the potential to deliver **70MtCO₂ of capture volumes** before 2030, and to comfortably achieve the required 2035 levels to stay on track for 2050. However **without visibility on future support structures the majority of the project pipeline is at risk.**



To enable the current pipeline of projects, more storage capacity and CO2 shipping is needed. Engagement from OGA, BEIS and TCE will be needed to coordinate and enable licensing of new stores as soon as 2022 and shipping needs to be integrated into the business models for capture and storage.



We have identified **10 urgent actions needed to enable this project pipeline to be delivered** and ensure timely progress toward the 2035 target.

UK Achievements

Up to **£20 billion** revenue support committed by UK Government



50% industry's ambition for local content



8 CO₂ capture projects in negotiation with government



21 new storage licenses, bringing the total up to **27**



4 clusters in negotiation with government



Global Developments

85 \$/tonne subsidy for CO₂ storage



Target for **50 million tonnes** per year of CO₂ injection capacity by 2030



The CCSA has identified...

CO₂ capture project pipeline has grown from **73** to **94** MtCO₂/yr in 2022 to MtCO₂/yr in 2023

12 clusters in development



Over **90** CO₂ capture projects in development



Over **£1 billion** estimated investment to date by CO₂ capture project and cluster developers



CCUS will create over **70,000** new jobs and help protect up to **77,000** existing jobs

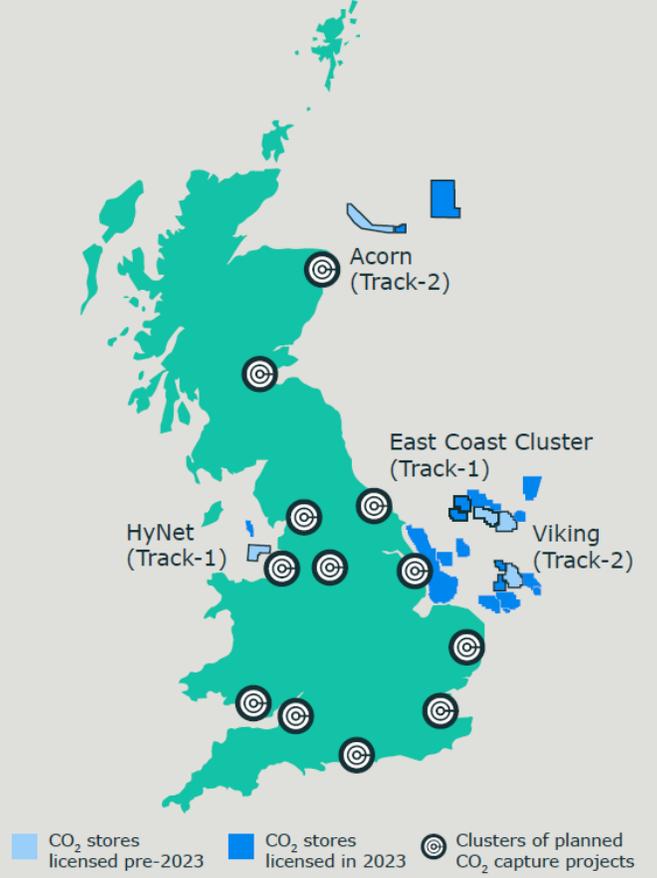


Policy makers must take action...

1/3 of projects surveyed are considering relocating their developments overseas if they cannot access CO₂ infrastructure and are unsuccessful in obtaining CCUS support



UK carbon capture and storage projects



1/3 of emitters currently planning to use carbon capture may need **non-pipeline transport** to access CO₂ storage



Work is in progress on the 10 urgent actions identified in last year's Delivery Plan, but some are falling behind schedule

| | |
|---|-----------------|
| 1 Hold regular funded contract allocation rounds | Not started |
| 2 Finalise business models across the value chain | Behind schedule |
| 3 Launch the next cluster selection process in the first half of 2022 | Complete (late) |
| 4 Legislate a policy framework to enable projects to develop at pace | Behind schedule |
| 5 Gain consensus on UK strengths in product and skill areas to prioritise for investment | On track |
| 6 Incentivise UK content in the supply chain | Behind schedule |
| 7 Accelerate entry into the workforce to meet demand | On track |
| 8 Accelerate permitting and consenting | Behind schedule |
| 9 Rapidly bring additional storage capacity to a commercial level of readiness | On track |
| 10 Establish strategy to support national, cluster and project-level communications | On track |

Europe-wide CCUS Delivery Plan



Data gathering commencing today for information on:

- CO2 capture projects
- CO2 transport, storage and/or aggregation projects
- CO2 utilisation projects
- Manufacture of components for CO2 capture

All data will be held securely and in the strictest confidence, and it will be anonymised and aggregated before any analysis is presented.

Please complete the survey by Tuesday 6th May

<https://forms.office.com/e/31n1SnfzdC>

Any questions? Email Rebecca.bell@ccsassociation.org or DeliveryPlan2025@ccsassociation.org

AOB & Conclusions

Summary:

- AOB
- Circulate minutes of the meeting & CCSA Competition Law Policy notice
- Establish co-chairs
- Next meeting: September

