



Carbon
Management
Europe

LEADS

Industrial voices – Sectoral perspectives on deployment and lesson learnt

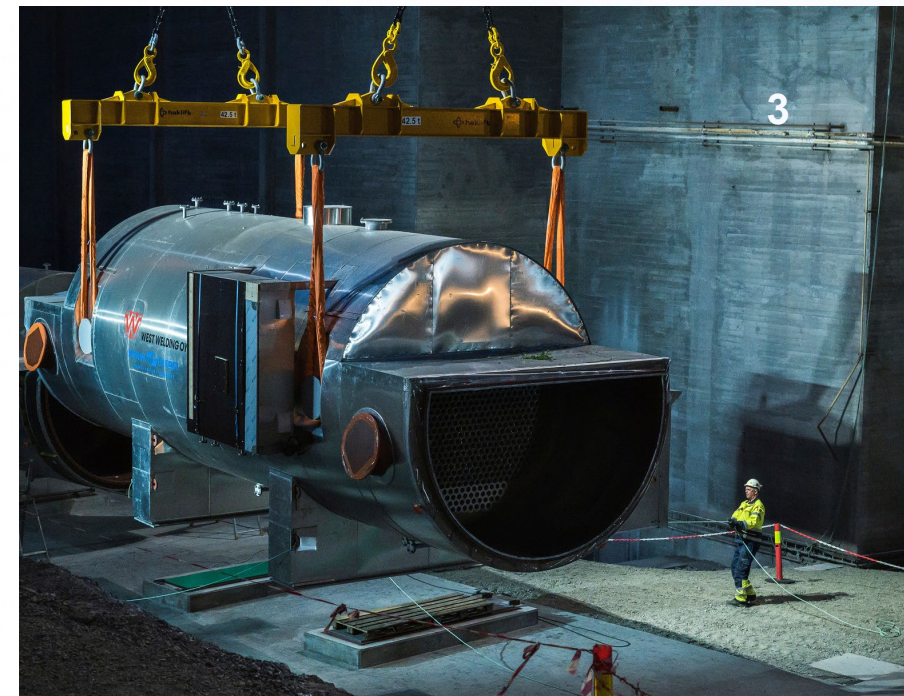
Carbon capture, use and storage (CCS and CCU)

Accelerating clean industrial deployment: Insights, challenges, and opportunities

12 May 2026 | Brussels, Belgium

The EU's official advisor on Industrial Carbon Management

- Founded by the European Commission in 2005 as a European Technology and Innovation Platform (ETIP) under the SET Plan.
- A multi-stakeholder platform providing technical analysis and evidence-based policy advice to advance industrial carbon management.
- Brings together 40+ organisations across the industrial carbon management value chain.
- Contributes to the Carbon Removals Expert Group, the Innovation Fund Expert Group and serves as an observer to international standardisation bodies (ISO/TC 265 and CEN/TC 474).
- Convenes EU institutions and national authorities through meetings and events, including a dedicated Government Group.



Our mission

Enabling and accelerating the deployment of industrial carbon management across Europe in line with climate neutrality.



By providing fact-based, science-driven **policy advice to EU and national authorities.**



By sharing policy insight to **inform members' strategic decisions.**



By translating stakeholder expertise into **actionable policy recommendations.**

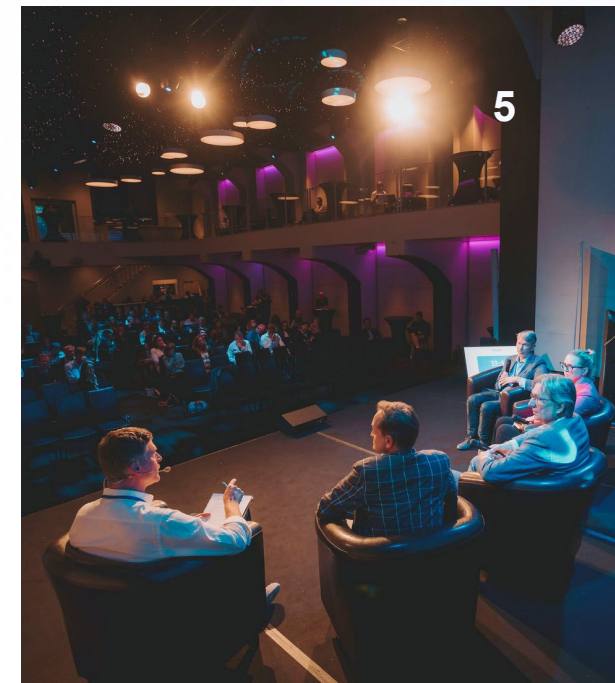


By providing a **knowledge-sharing platform** to address deployment challenges.



Our work

- **Analysis:** Developing technical analysis with researchers, project developers and financiers to ensure policy is grounded in science and real-world experience.
- **Knowledge sharing:** Enabling structured exchange across diverse stakeholders through working groups, the Advisory Council, Governments Group and thematic networks.
- **Events:** Organising regular webinars and events, including the Industrial Carbon Management Summit and Projects Network meetings.
- **Advocacy:** Engaging with EU institutions and national governments to inform climate and energy policy.



Current ICM momentum

Technological developments?

Some, but not a key factor – technologies already well assessed & operational in other parts of the world.

Key barriers unlocked:

- Carbon price in the EU ETS increased
- Emitters who have not yet decarbonised their production now face the end of free allocation (cf. CBAM phase-in)
- NZIA's obligations to contribute to the EU's CO2 injection capacity target (50 Mtpa by 2030)

Think of policy instruments affecting CCS/U in terms of:

“Sticks”
(pressure levers)

“Carrots”
(incentives)

“Control”
(legal & regulatory)

EU policy developments

2019

- European Green Deal
- followed by 2021 European Climate Law (legally binding target, climate neutrality by 2050)
- Provisional application of the 2009 amendment of Article 6 of the London Protocol – allowing cross-border transport of CO₂ for the purpose of geological storage in sub-seabed formations

2021

- Communication on Sustainable Carbon Cycles
- Launch of CCUS Forum (now “ICM Forum”)
- CCS and CO₂ transport recognised as sustainable investments in the EU Taxonomy

2022

- CO₂ transport and infrastructure projects eligible as PCIs/PMIs under TEN-E
- Commission Proposal for an EU certification framework for carbon removals
- Expert Group on Carbon Removals

EU policy developments

2023

- Green Industrial Plan
- Flexible state aid rules for CCS (cf. TCTF)
- Proposal for a Net-Zero Industry Act (NZIA)
- Revision of the EU ETS (scope extended to all means of CO₂ transport)
- EU regulatory framework for CCU (cf. RED III & DAs RFNBOs)
- FuelEU Maritime Regulation: special incentive regime to support the uptake of RFNBOs, including the use of CCU-based fuels (after the next EU ETS revision)
- ReFuelEU Aviation Regulation: requires synthetic fuels produced with renewable energy through CCU to also be considered as RFNBOs (starting from 2030)
- Revised NECPs with CCS
- Parliament Resolution on Sustainable Carbon Cycles

Feb 2023 – EU ETS carbon price reaches all time high (exceeding 100 €/tCO₂)

- Post-COVID economic rebound driving GHG emissions & demand for allowances + war in Ukraine increasing gas prices vs. reduced cap on emissions
- Price projections estimate EU carbon allowances to reach 130-160 €/tCO₂ in 2030

EU policy developments

2024

- Communication on 2040 climate target
- Industrial Carbon Management Strategy
- adoption of the Net-Zero Industry Act (NZIA)
- updated Guidance Documents supporting the CCS Directive
- inclusion of permanent CCU in the EU ETS
- adoption of the EU certification framework for carbon removals (CRCF)

EU policy developments

2025

- Competitiveness Compass
- Clean Industrial Deal
- Proposal for an EU Competitiveness Fund
- New EU state aid framework (CISAF)
- Legal proposal for 2040 climate target
- Industrial Decarbonisation Accelerator Act
- CRCF verification rules and methodologies for permanent CDR

EU policy developments

And beyond (2026-27)

- CBAM phase-in
- NZIA implementation
- CRCF implementation
- GBER
- EU ETS revision
- Industrial Decarbonisation Bank
- TEN-E revision
- CO2 market & transport infrastructure regulatory framework
- European Competitiveness Fund and FP10,
- ...

+ Growing number of EU Member States adopting strategies and roadmaps for CCS deployment

Emerging EU industrial carbon management architecture

EU framework = progressively more comprehensive , but remains fragmented

Infrastructure & market design

ICMS, CO2 market & infrastructure regulatory framework, TEN-E

Carbon pricing

EU ETS, CBAM, VCM

Funding support

IF, IDB, CEF, Horizon, EIC, EIB

Industrial policy

NZIA, CID, State aid

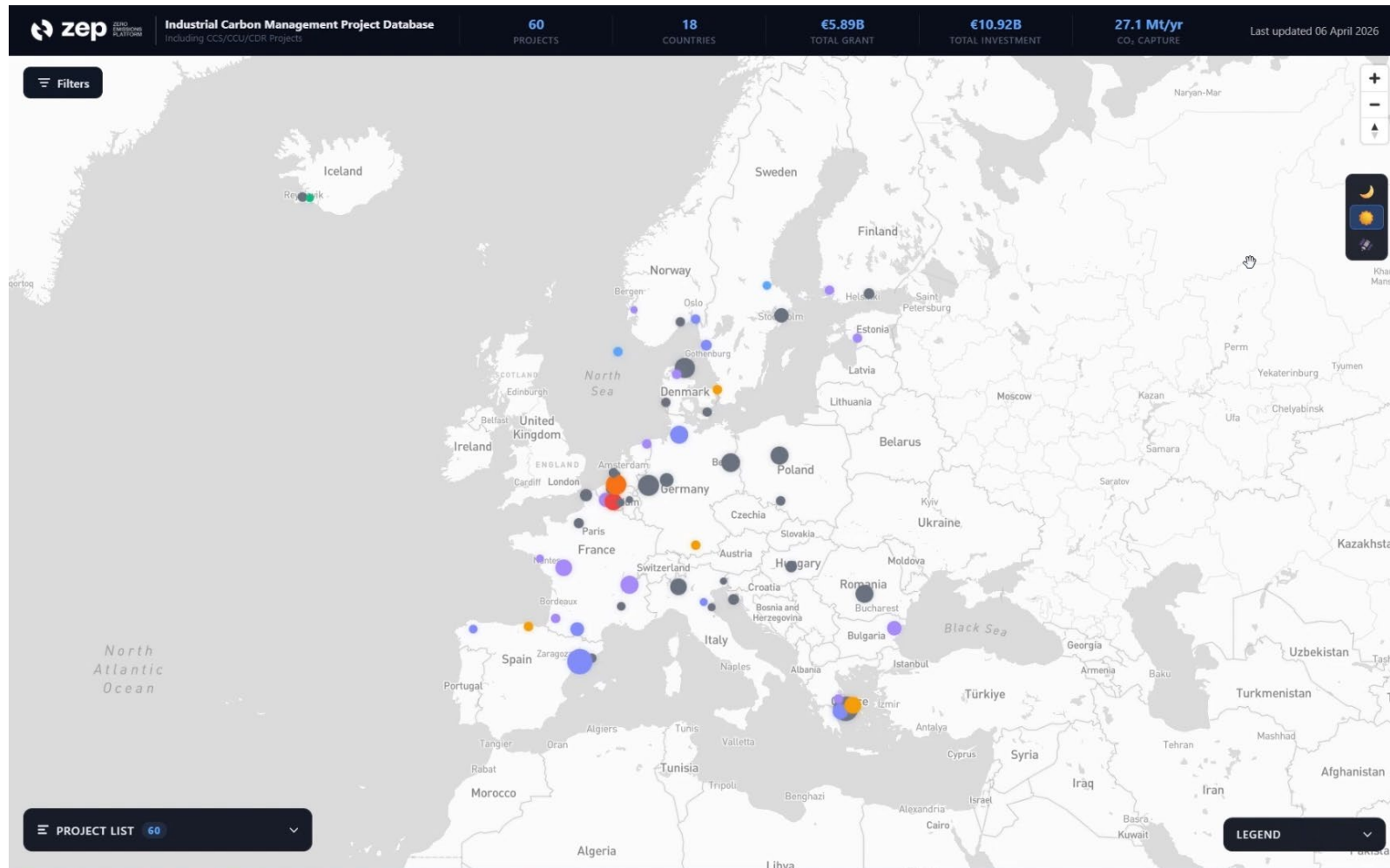
Carbon accounting & governance

CCS Directive, MRR, CRCF, RED

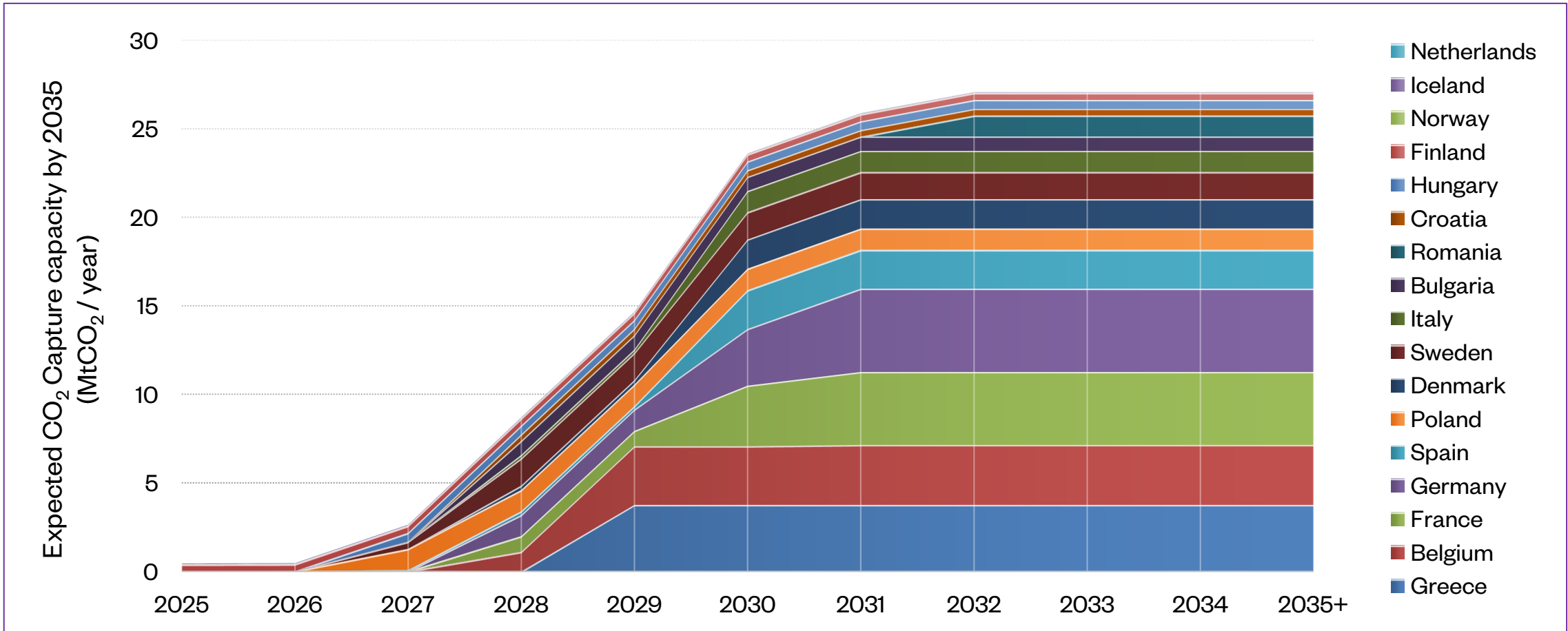
EU funding landscape

Instrument	Main role
Horizon Europe (and EIC)	Early-stage R&I and pilots
Innovation Fund	First-of-a-kind deployment (technology risk)
CEF-Energy	Cross-border CO2 infrastructure
EIB / InvestEU	Debt and project finance
State aid (CEEAG/CISAF/GBER)	National support and operating aid
Industrial Decarbonisation Bank	Focus on energy-intensive industries (bridges commercialisation to widespread deployment gap)

[Upcoming] Innovation Fund ICM Project Database



[Upcoming] Innovation Fund ICM Project Database



Expected CO₂ capture volumes, sorted by country (MtCO₂/year)

[Upcoming] Innovation Fund ICM Project Database

Sector	Amount
Cement	19
CO ₂ transport & storage	8
Other	8
Bioenergy	7
Refineries & Chemicals	6
Lime	4
Iron & Steel	3
Waste-to-energy	3
Metals & Mining	1
Fertilisers	1

Category	Amount
CCS (geological storage)	25
CCU (SAF, mineralisation, e-fuels, methanol)	15
CO ₂ transport & storage infrastructure	8
CCS & CCU	4
Power-to-X	3
Carbon Removal (CDR)	3
Other	2

Status	Amount
Pre-FID / Advanced Development	16
Engineering & Design	11
Early Development	10
FEED & Permitting	9
Under Construction	5
On Hold / Cancelled	4
Grant Preparation	4
Operational	1

Emerging lessons from first movers

1. Importance of clusters

Industrial clusters reduce costs (+ risks) and aggregate volumes

2. Infrastructure bottlenecks (timing mismatch, permitting delays, cross-border issues)

Highlights importance of regulatory framework & network planning

3. Standardisation is increasingly important

MRV, contracting, CO2 specifications, liability allocation

4. Public funding remains critical

Especially for first-of-a-kind risk, network infrastructure, early operating gaps

5. Policy stability matters more than perfect policy

Investors value predictability, visibility, and long-term direction vs. uncertainty around future carbon price trajectories



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Any questions?

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