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Analysis of the value chain scenarios in the Baltic and Mediterranean Regions

Alla Shogenova & Kazbulat Shogenov
Tallinn University of Technology

CCUS ZEN Partners

- Isaline Gravaud, BRGM , France
- Leandro Sousa, Maria Bonto, Ramboll, Denmark
- Adam Wójcicki, Polish Geological Institute – National Research Institute, Poland
- Ane Elisabet Lothe, Eirik Falck da Silva, SINTEF Industry, Norway
- Çağlar Sınayuç, Betül Yıldırım, Sevtaç Bülbül, Middle East Technical University (METU) Petroleum Research Center, Türkiye
- Florian Schmitt, Matthias Honegger, Perspectives Climate Research, Germany
- Ingvild Ombudstvedt, Lena Østgaard, IOM Law, Norway
- Peter Frykman, GEUS – Geological Survey of Denmark and Greenland, Denmark
- Chérif Morcos, Laurianne Bouvier, AXELERA, France
- Anastasios Perimenis - CO2Value Europe
- Audrey Lopez – Technip, France
- Ioannis Koumentis – Genesis Energies, France



Work Package 3 – Value Chain Scenarios Objectives

Identify

- Identify the most promising CCUS value chains for the CCUS ZEN regions based on SWOT analysis.

Establish

- Establish a generic framework for the selection of the most prospective CCUS value chains, based on the high-level screening methodology established in WP1 and integrated with WP2 analyses.

Identify

- Identify potential PCI and determine key stakeholders.

Integrating non-technical aspects



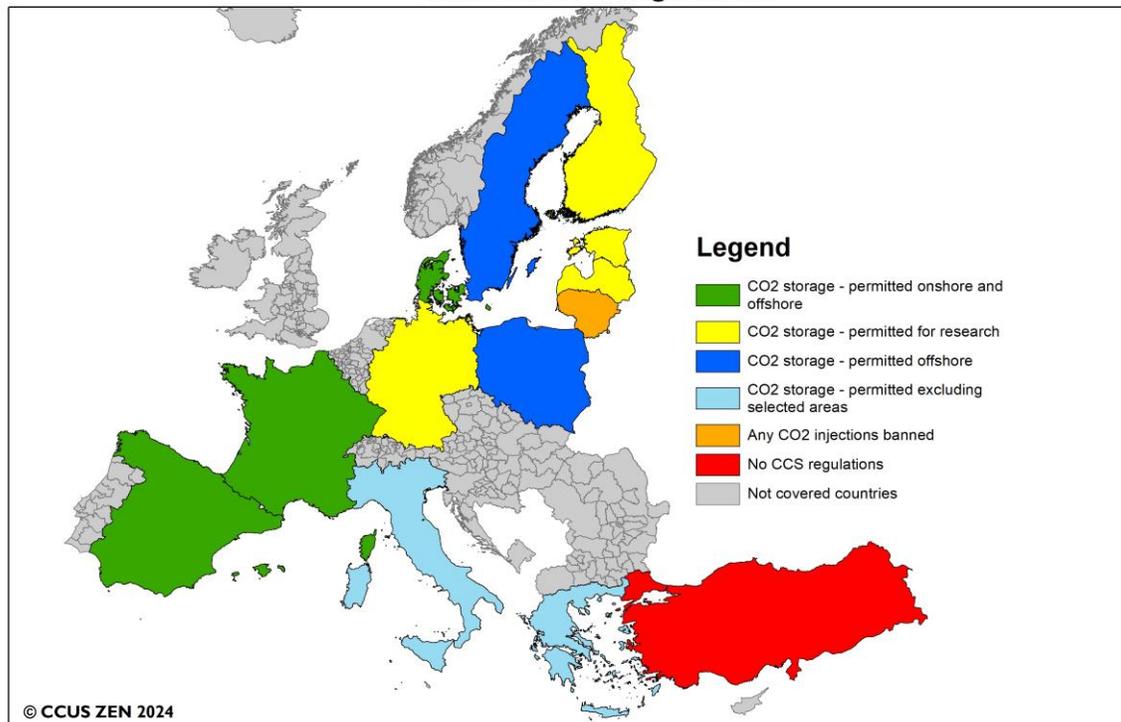
CCUS ZEN WEBSITE:

<https://www.ccuszen.eu/about-project/project-partners>

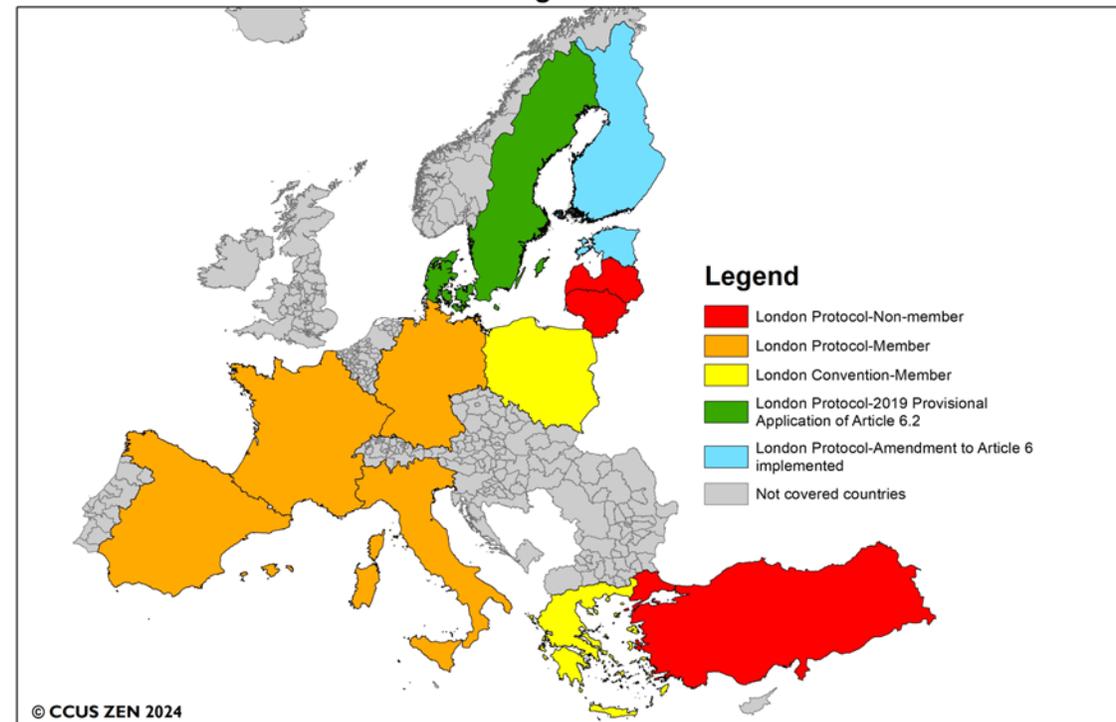
- Integrate technical and non-technical data collected by project into common maps showing overall situations in the two CCUS ZEN regions and selected CCUS value chains.
- Identify value chains facing severe challenges due to non-technical aspects such as legislation and social acceptance and propose mitigation measures and recommendations for immediate needed actions.
- Categorize the list of the promising CCUS value chains to be analysed further into the more ready (first-line readiness) and less-ready (second-line readiness) value chains and define the possible year for the projects to start

Integrating non-technical aspects: Regulations

National CCS Regulations

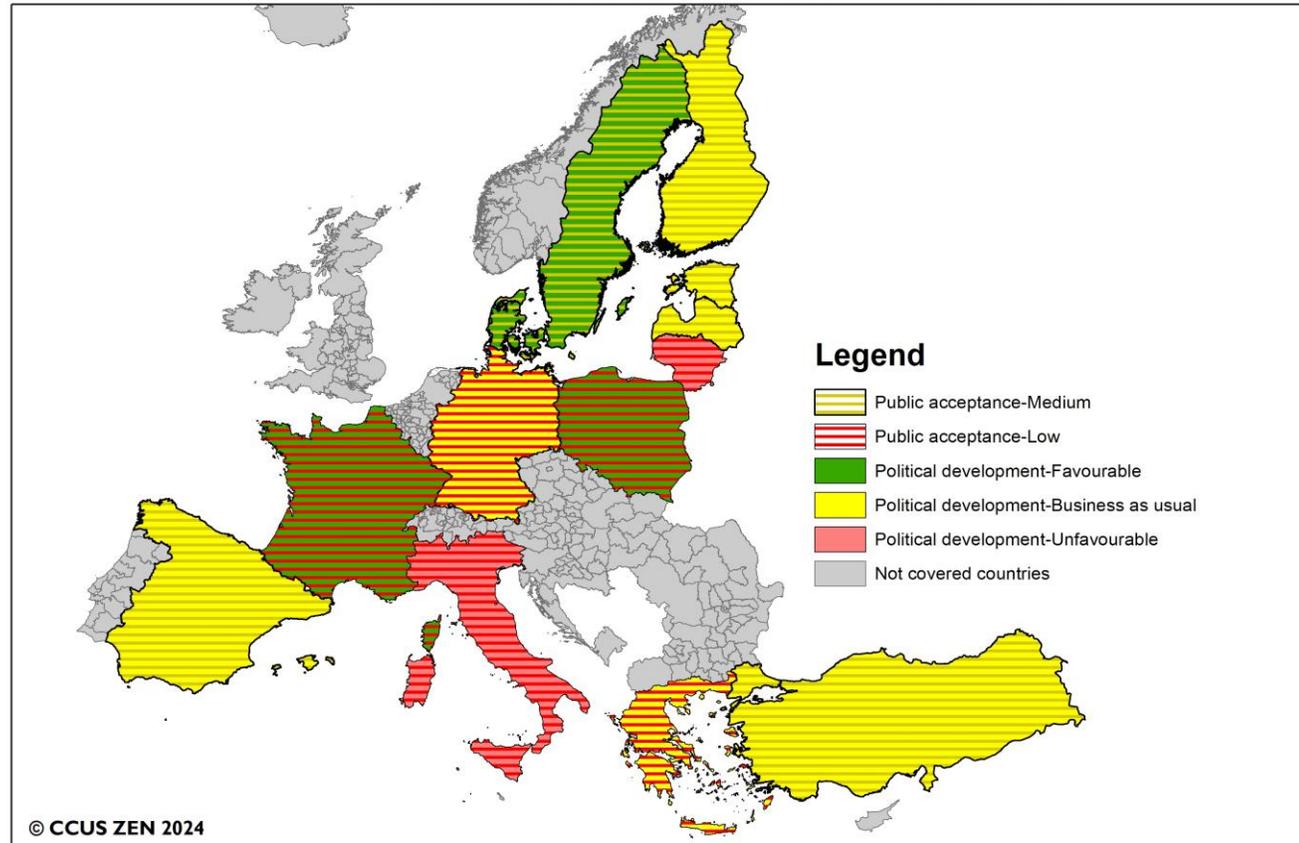


International Regulations: London Protocol



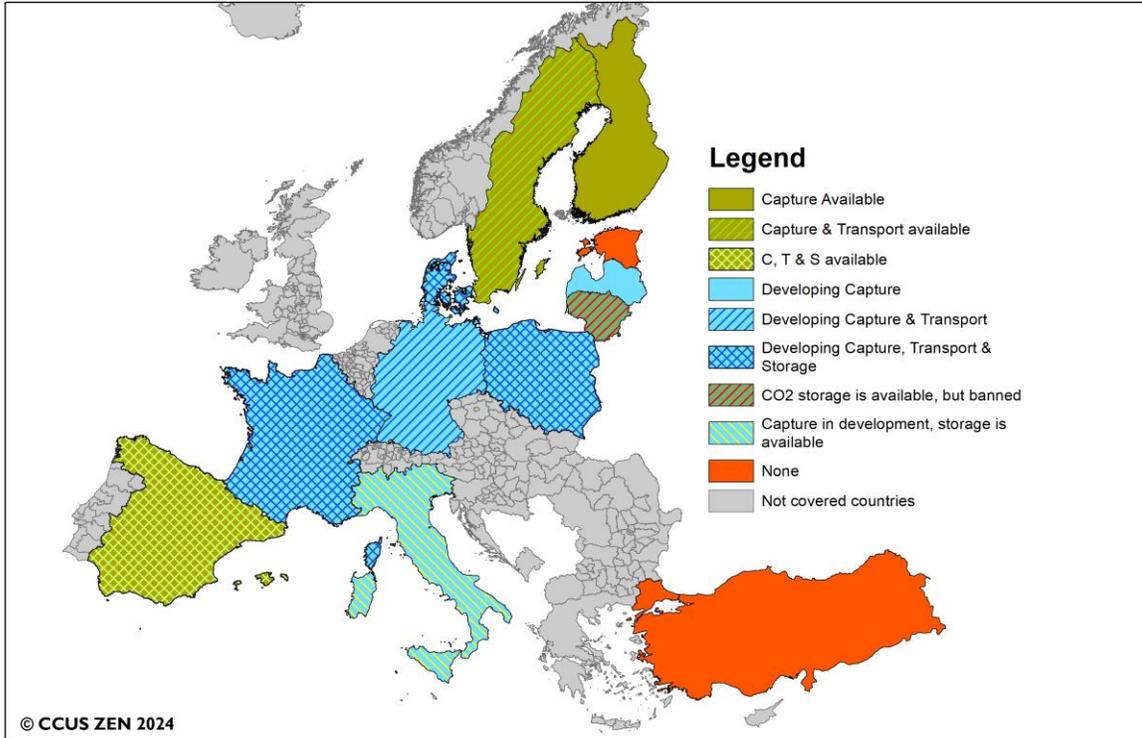
Public acceptance and political development

Public Acceptance and Political Development

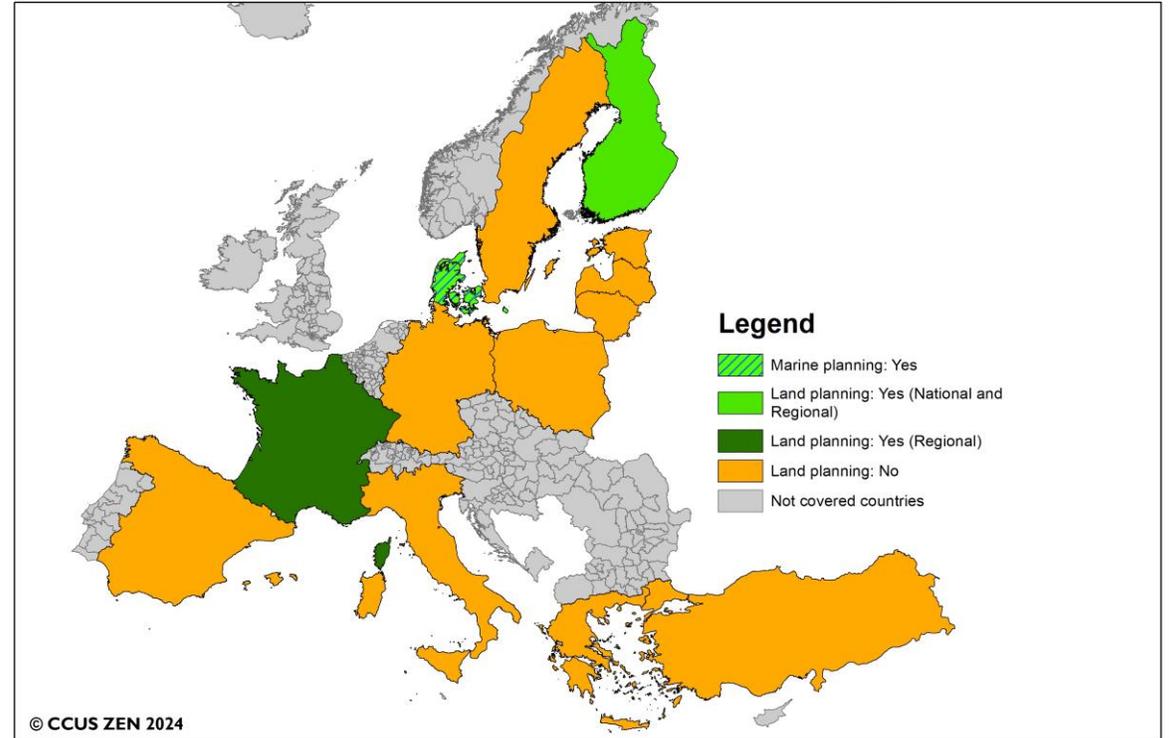


READINESS OF CCUS VALUE CHAIN AND CCUS IN MARINE AND LAND USE PLANNING

Readiness of the CCUS value chain

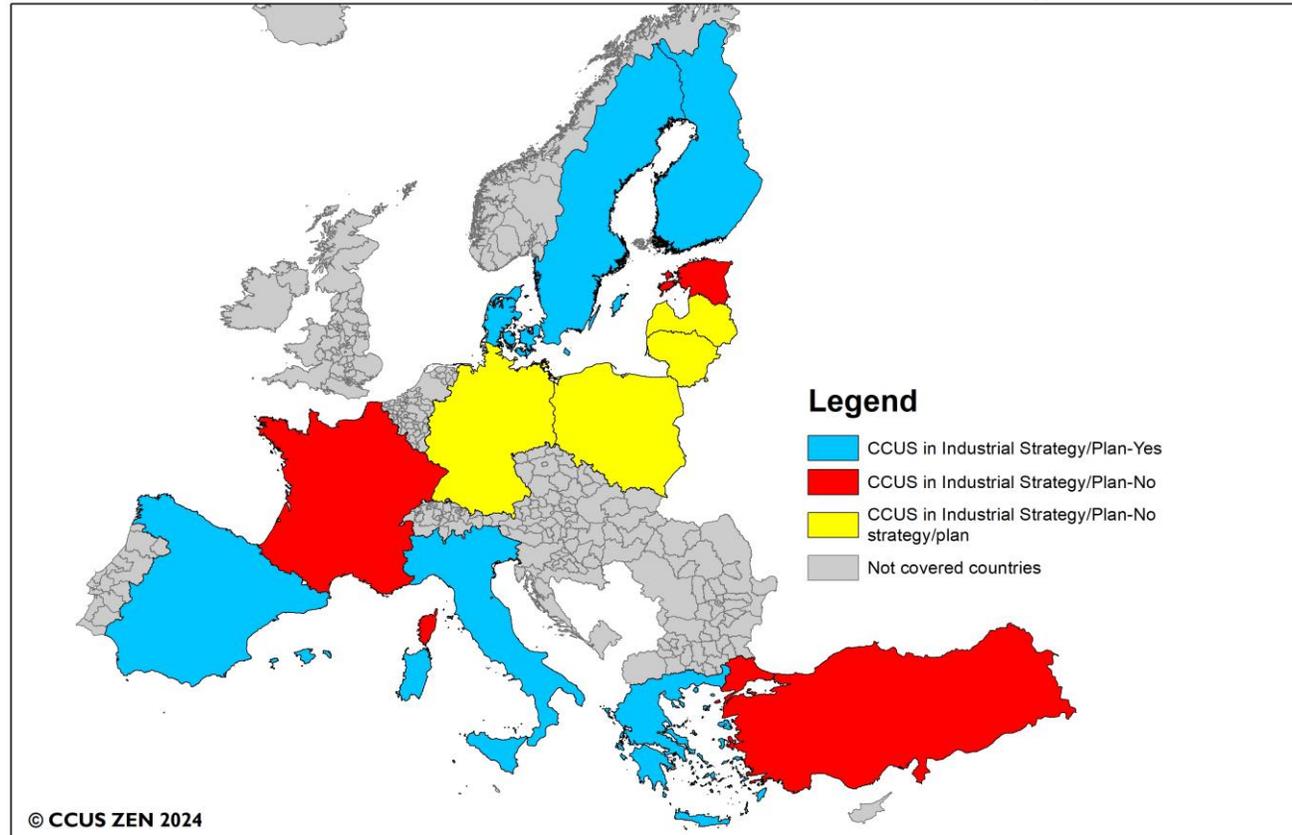


CCUS in Marine and Land Use Planning

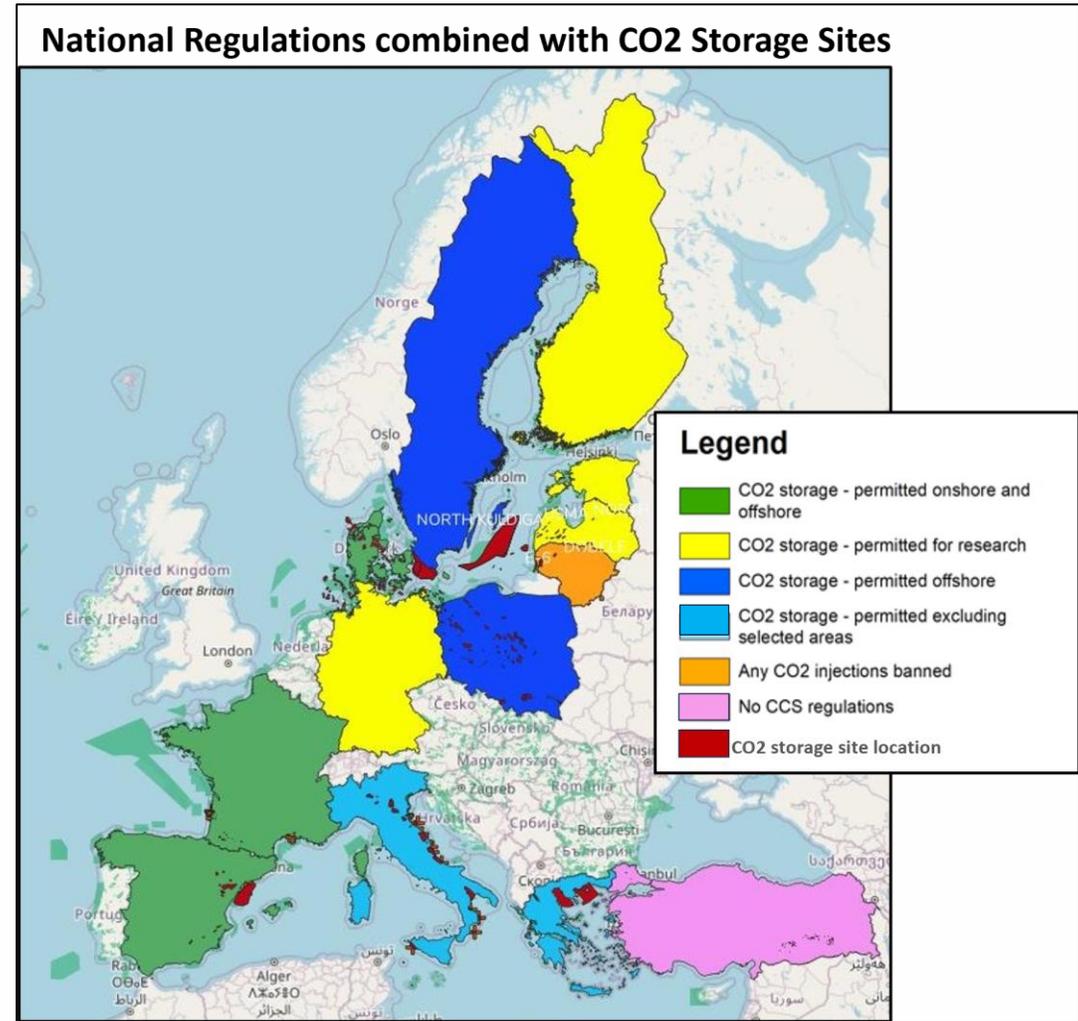
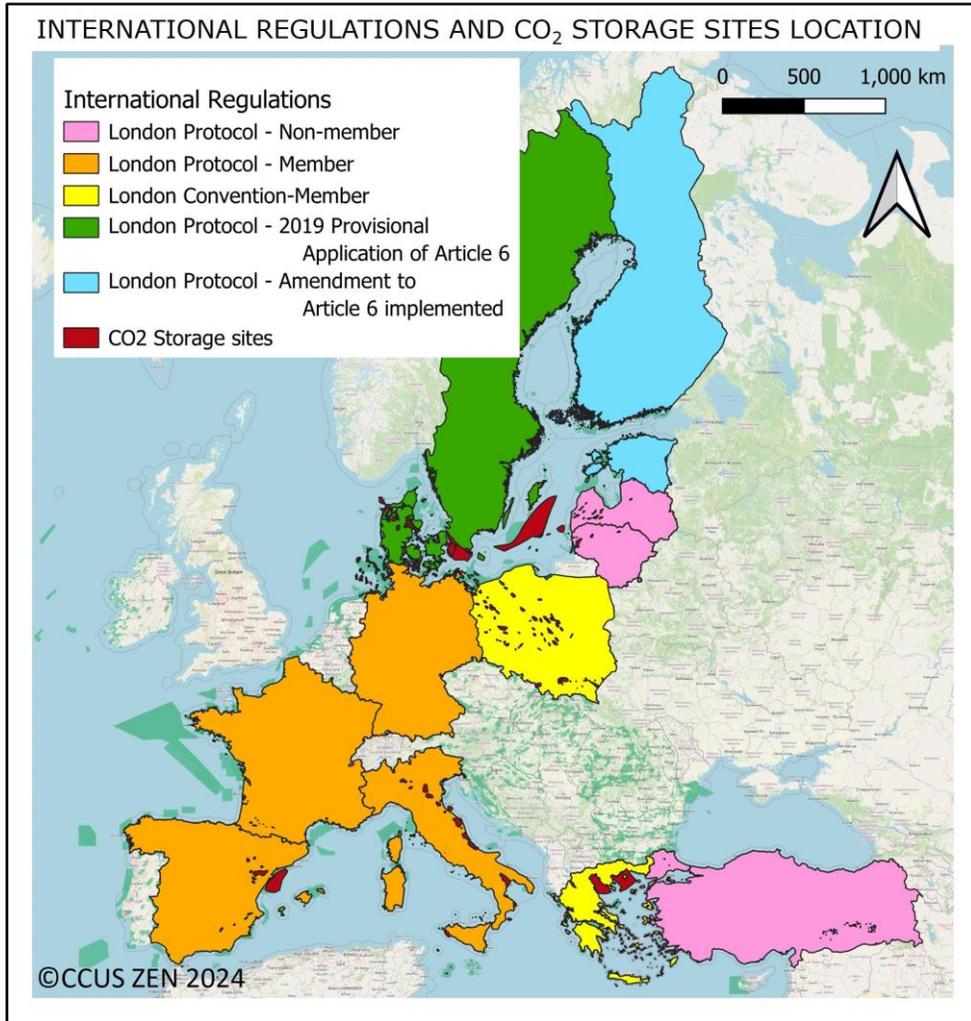


INTERACTION WITH OTHER DECARBONIZATION TECHNOLOGIES

Interaction With Other Decarbonisation Technologies



Integrating technical and non-technical data



SWOT analyses of CCUS value chains

INTERNAL GROUPS Strength and Weakness

Technical

CO₂ emission plants

CO₂ storage sites

Infrastructure (available and planned)

CO₂ use options

EXTERNAL GROUPS Opportunities and Risks

Technical

Area around the storage site



Non-technical

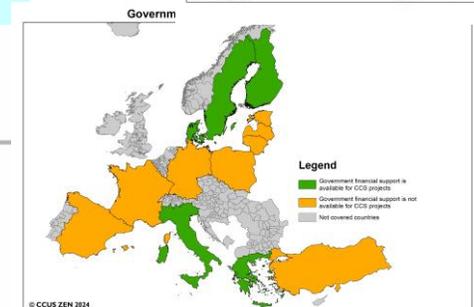
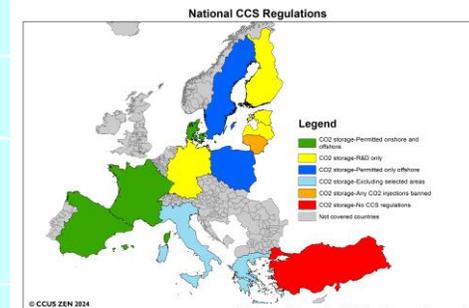
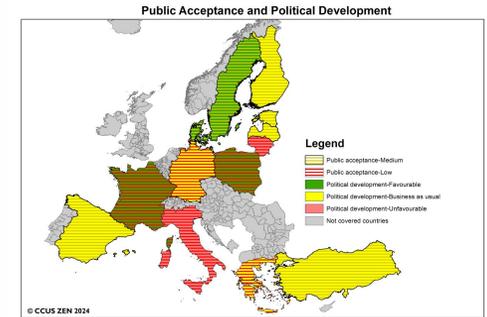
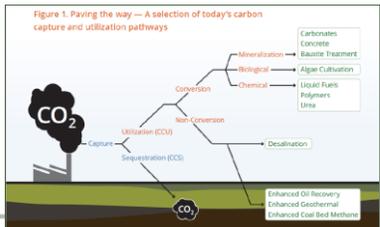
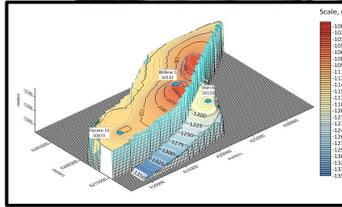
Social

Political development

Regulatory

MRV (Monitoring Reporting and Verification)

Financial



INTERNAL FACTORS

EXTERNAL FACTORS (Opportunities and Threats)

Technical (Strength and Weakness)

CO₂ emission plants

- CO₂ volumes (including Bio-CO₂)
- Longevity of the plant and capture-readiness
- Piloting/planning of CO₂ capture
- CO₂ use options available
- Green hydrogen production planning

CO₂ storage sites

- Porosity and permeability of the reservoir rocks
- CO₂ storage capacity
- Quality of the cap rock
- Safety and injectivity
- Storage Readiness Level (SRL)

Infrastructure

- Transport distance
- Availability of the natural gas pipelines
- Total CO₂ emissions per distance unit
- Wells in operation
- Availability of the offshore infrastructure
- Planned PCI projects

CO₂ use options

- CO₂ use projects in operation, or R&D
- Longevity of CO₂ use products
- Availability of Bio-CO₂ for CO₂ use
- Volume of CO₂ which could be used
- Possible revenues

Technical

The area in and around the storage site:

- Located in a densely populated area
- Belonging to landlords
- Located in seismic risk area
- Located in Natura 2000 area or other protected area.



Non-technical

Social

Public acceptance

Political development

Governmental Support
CCUS included in NECP

Regulatory

International Regulations:

- London Protocol and related issues

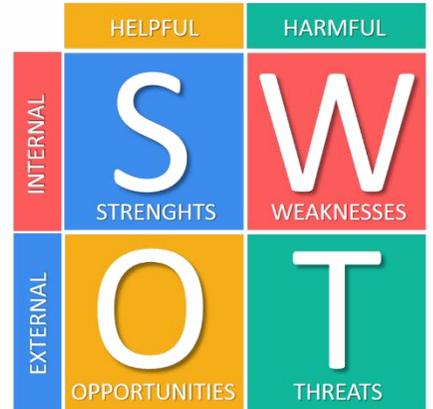
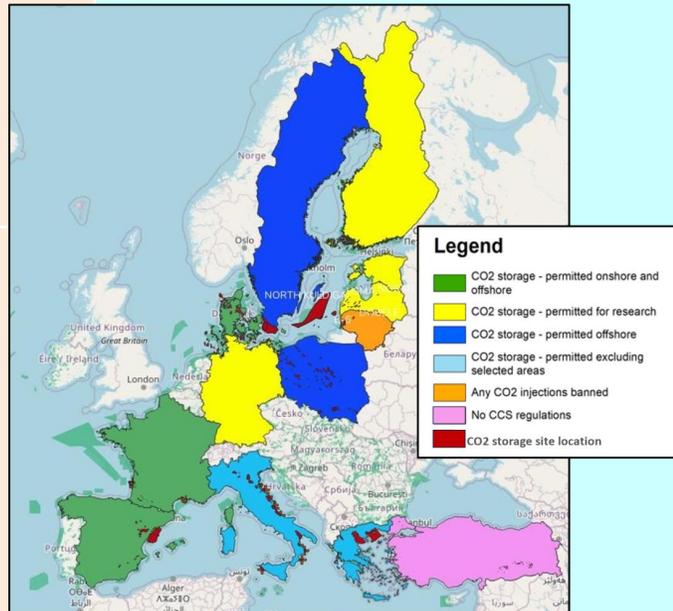
Regional Regulations:

- Helsinki Convention
- Barcelona Convention

National Regulations

- CCS Regulations
- National CO₂ tax

National Regulations combined with CO₂ Storage Sites



Multivariate SWOT analyses of CCUS value chains

MRV (Monitoring Reporting and Verification)

MRV and accounting readiness

Financial

Availability of government financial support along the value chain



Baltic Clusters

- ▷ Storage sites location:
 - Latvia (B-1)
 - North Poland (B-4)
 - Denmark (B2, B3)
- ▷ One national onshore project: North Poland (B-4)
- ▷ One bilateral onshore project (B-1)
- ▷ Two projects offshore and onshore for 3 countries (B2, B3)

BALTIC 4 CLUSTERS

Baltic -2, Germany, Denmark, Sweden, 20/33 emitters (9 clusters), 8 storage sites

Baltic -3, Germany, Denmark, Sweden, 16 emitters (4 clusters), 3 storage sites

Baltic - 1, Latvia-Lithuania, 6 emitters (2 clusters), 2 storage sites

Baltic - 4, North Poland, 18/11 emitters (1 cluster), 2 storage sites

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HERCCULES
full CCUS chain demonstration

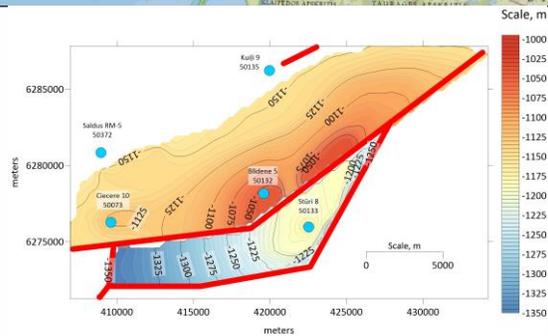
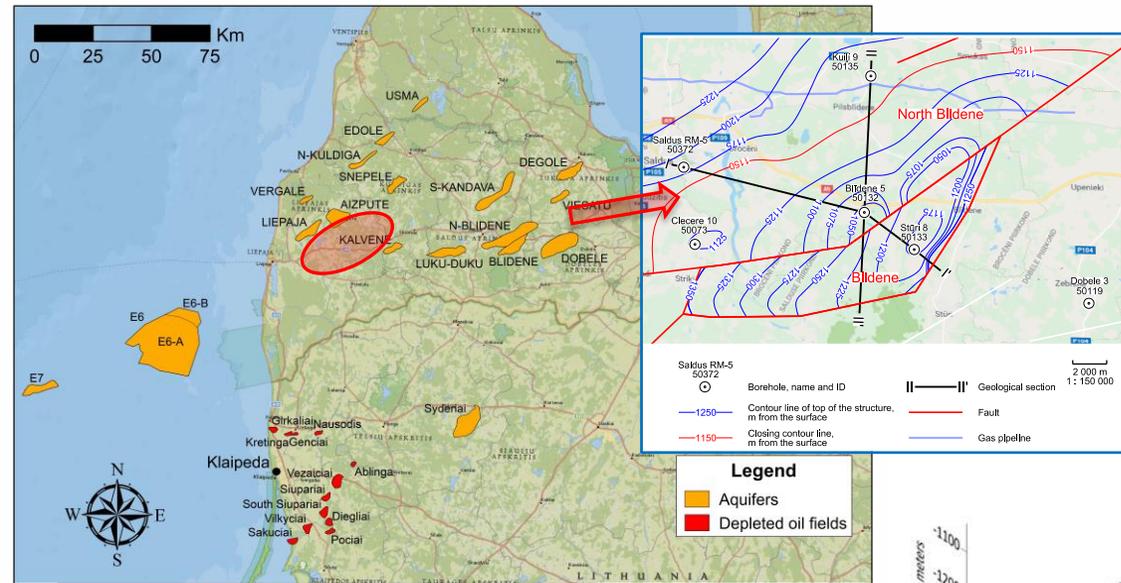


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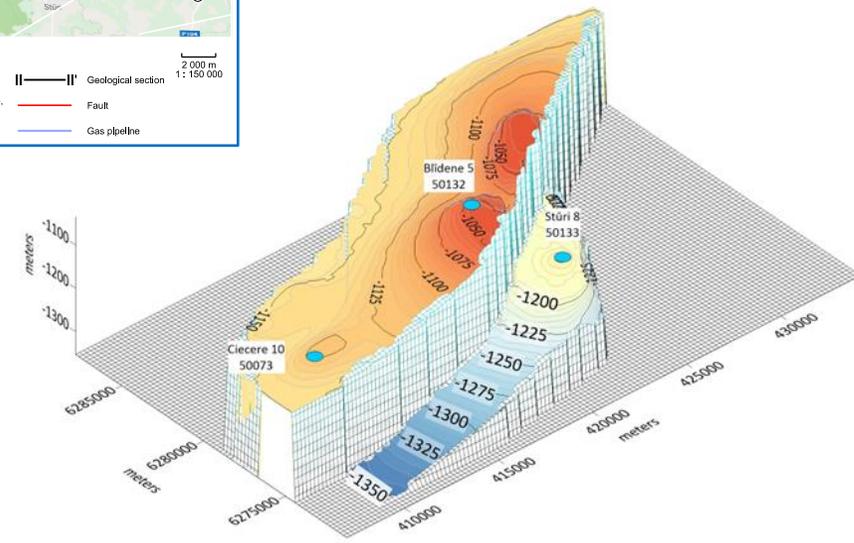


Blidene and North-Blidene structures

Structure map of the the top o the Cambrian Series 3 Deimena Formation sandstones in the North Blidene and the Blidene structures. Base map is from the Google Maps, 2018 (Simmer, 2018)

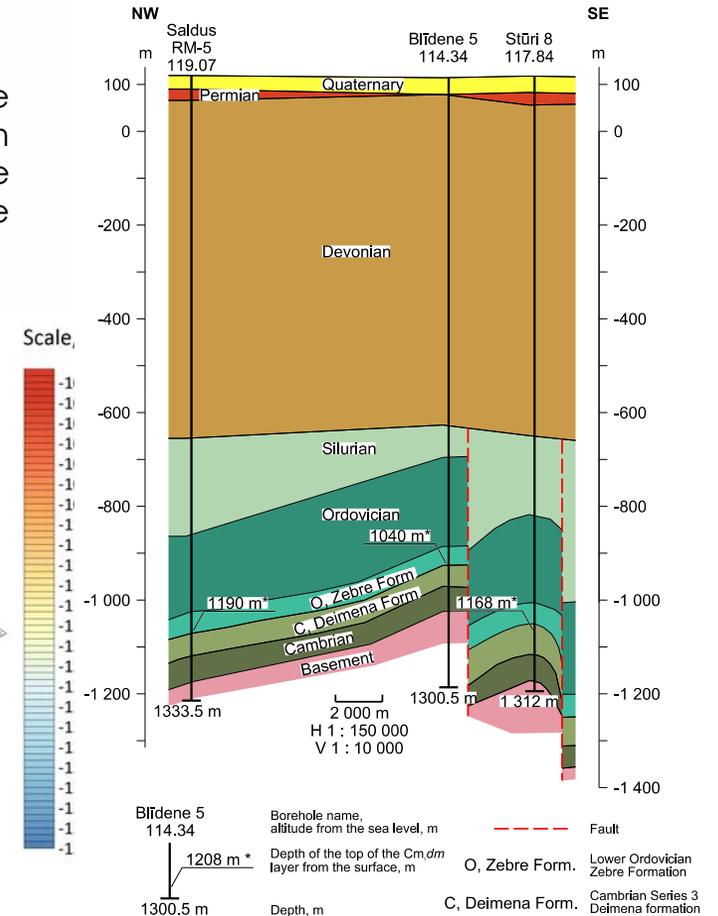


Contour maps of the top o the Cambrian Deimena Formation in the North Blidene (left) and the Blidene (right) structures. Fault line is indicated with red polyline



3D structure maps of the Deimena Formation in the North Blidene (above) and the Blidene (below) structures. Both pictures are composed using Golden Surfer 15 software (Simmer, 2018)

Geological section I-I'

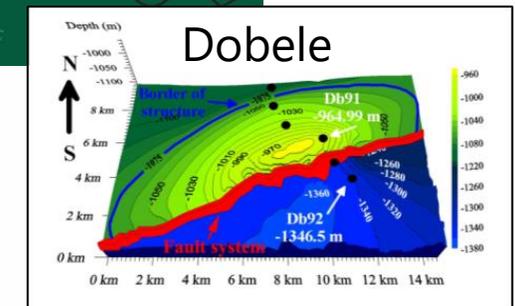
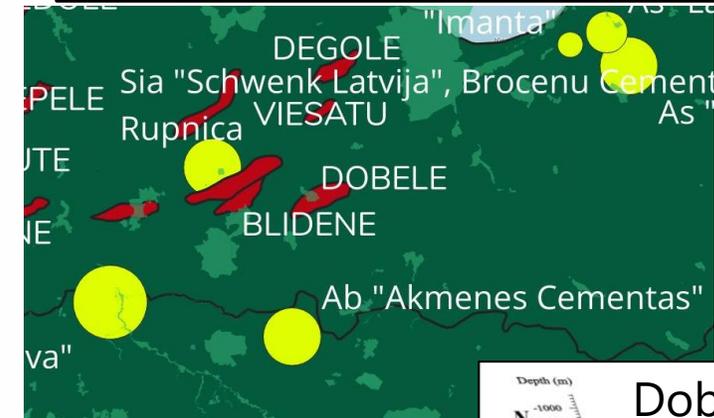
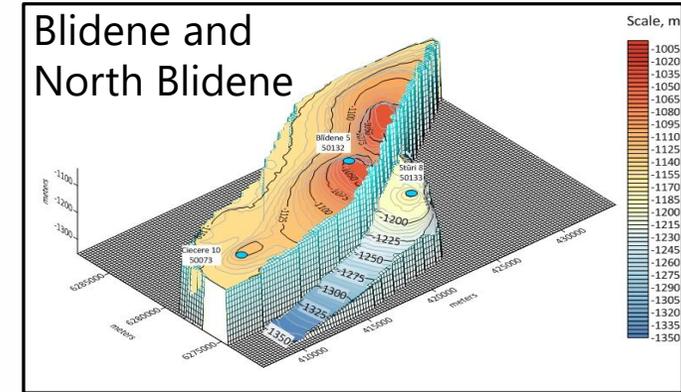


Geological sections across line I-I'. The map and section are composed using Bentley PowerCivil for Baltics V8i (SELECTseries 2) software (Simmer, 2018)

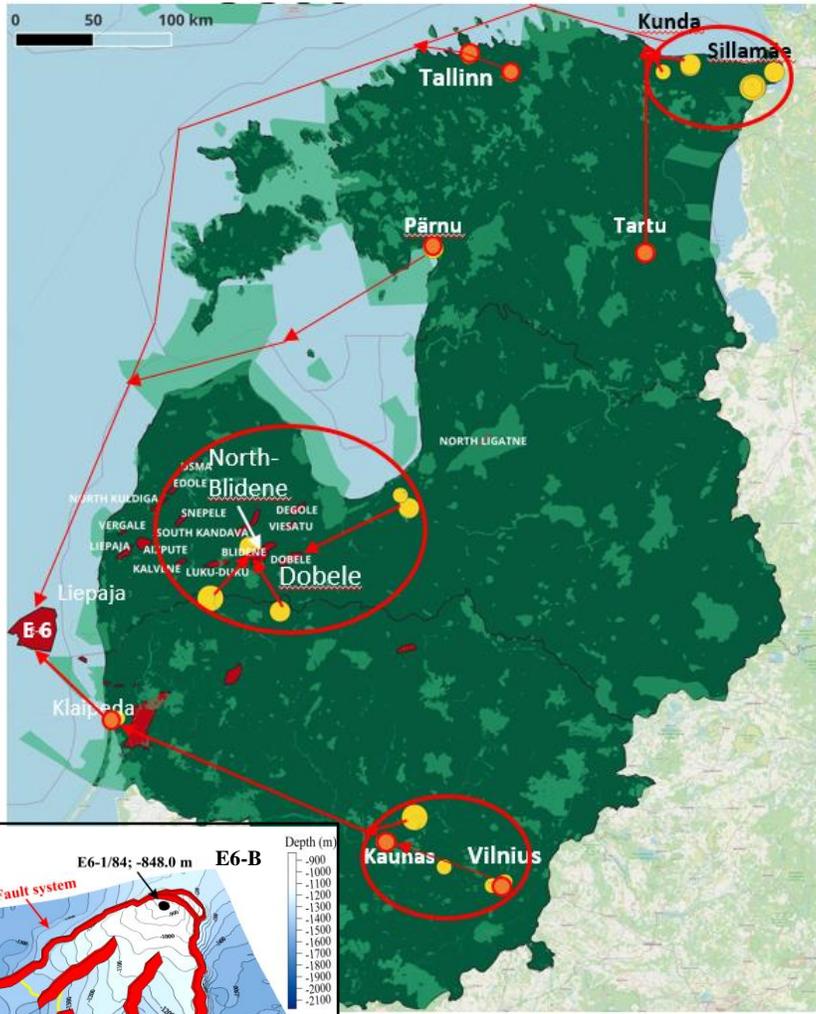
Baltic-1: Latvian-Lithuanian onshore CCUS project

Cambrian Deimena Formation sandstones reservoir in Latvia

Parameters	North Blidene	Blidene	Dobele
Storage ID	S_LV10	S_LV2	S_LV4
Depth of reservoir top, m	1035-1150	1168-1357	965-1013
Reservoir thickness, m	48	66	52
Trap area, km ²	141	62	70
CO ₂ density, kg/m ³	881	866	900
Net to gross ratio, %	75	80	85
Salinity, g/l	100-114	100-114	114
Permeability, mD	370-850	370-850	0.1-670/360
T, °C	18	22.9	18
Storage eff. factor (Seff) Optimistic/Conservative (%)	30/4	5/3	20/4
Porosity (min-max/avg), %	12.5-25.6/20	13.5-26.6/21	10-26/19
Optimistic CO₂ storage capacity (min-max/avg), Mt	167-342/267	19-37.5/29.6	56-145/106
Conservative CO₂ storage capacity (min-max/avg), Mt	22.2-45.5/35.6	11.4-2.5/17.8	11-29/21

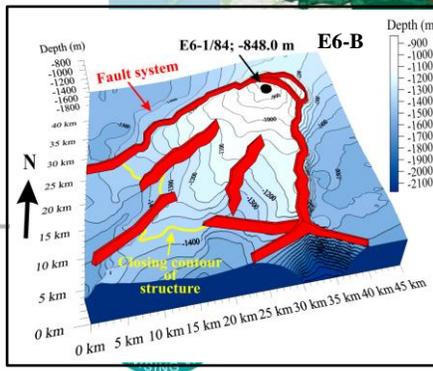


Baltic offshore scenario



Cluster name	Facility name	Company name	City	Industry sector	CO2 reported (ETS) (t/y)	CO2 from biomass (t/y)	CO2 from Waste-to-energy (t/y)	Total CO2 emissions (t/y)
ESTONIA								
Baltic-Est-Lat-Lit-Offshore	Eesti Power Plant	Enefit Power As	Auvere	Power	2607958	16000		2623958
Baltic Est-Lat-Lit-Offshore	Auvere Power Plant	Enefit Power As	Auvere	Power	885666	409944		1295610
Baltic Est-Lat-Lit-Offshore	Auvere Shale Oil Plant	Enefit Power As	Auvere	Shale Oil Plant	788760			788760
	Balti Power Plant	Enefit Power As	Narva	Power	645847	187767		833614
	VKG Shale Oil Plant	VKG Oil As	Kohtla-Järve	Shale Oil Plant	697209			697209
	VKG Energia North Thermal Power Plant	VKG Energia Oü	Kohtla-Järve	Power	593857			593857
	Kiviõli Keemia-tööstuse OÜ	Kiviõli		Shale Oil Plant	159357			159357
	Horizon Paper Factory	Tsellu-loosi ja Paberi AS	Kehra	Paper and pulp	12888	239481		252369
	Utilitas Tallinn Power Plant	Utilitas Tallinna Elektri jaam Oü	Tallinn	Power	9796	259000		268796
	Fortum Cogeneration Plant	Fortum Eesti As	Pärnu	Power		268000		268000
	Anne Cogeneration Plant	Anne Soojus As	Tartu	Power		244450		244450
	Iru Waste to Energy Plant	Enefit Power As	Iru	WtE			138483	138483
Total for Lithuania					3491363			
Total for offshore cluster					11655826			
							Total for Estonia: 8164463	

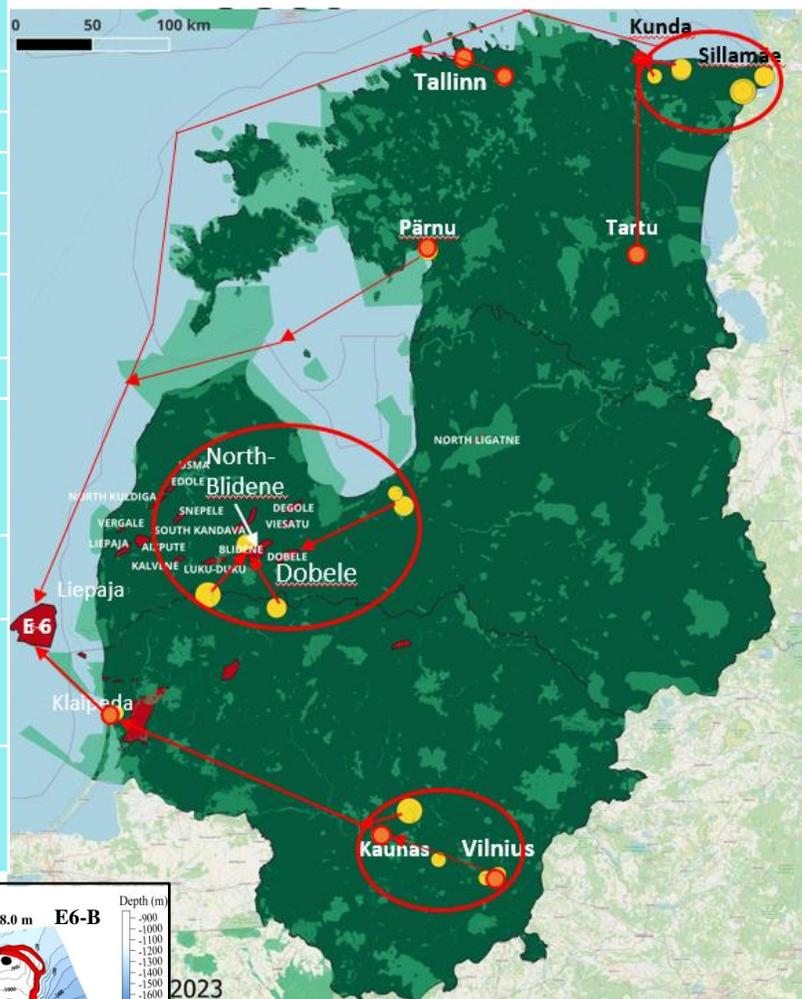
Company name	City	Industry sector	CO2 reported (ETS) (t/y)	CO2 from Waste-to-energy (t/y)	Total CO2 emissions (t/y)
Ab "Achema"	Kaunas	Chemical	2208916		2208916
Ab "Lietuvos Energijos Gamyba"	Vilnius	Power	304646		304646
Ab "Vilniaus Šilumos Tinklai"	Vilnius	Power	293090		293090
	Kaunas	WtE		198000	198000
	Vilnius	WtE		169000	169000
Uab „Fortum Klaipėda“	Klaipėda	WtE		126007	126007
UAB "Toksika"	Šiauliai	Hazardous WtE		79000	79000
UAB Kauno kogeneracine jėgainė	Vilnius	WtE	112704	112704	112704



Parameters	E6-A
Storage ID	S_LV5
Depth of reservoir top, m	848-901
Reservoir thickness, m	53
Trap area, km ²	553
CO ₂ density, kg/m ³	658
Net to gross ratio, %	90
Salinity, g/l	99
Permeability, mD	10-440 (170)
T, °C	36
Storage eff. factor (Seff)	10/4
Optimistic/Conservative (%)	
Porosity (min-max/avg), %	14-33/21
Optimistic CO ₂ storage capacity (min-max/avg), Mt	243-582/365
Conservative CO ₂ storage capacity (min-max/avg), Mt	97-233/146

Baltic offshore scenario

Carbon Neutral Scenario for the Baltic States

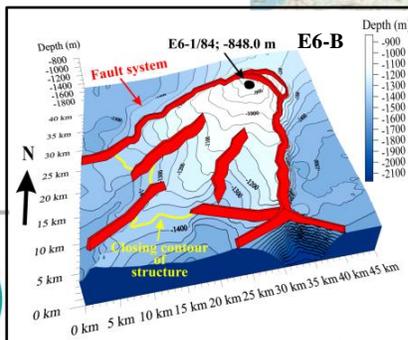


The Baltic offshore cluster includes most of the large Estonian and Lithuanian fossil and bio-emission sources – one of which Klaipėda WtE Plant and other sources located in central and south-eastern Lithuania.

The CO₂ is supposed to be transported from proximal emitters by pipelines, while the E6 structure is to be linked by pipelines and ships, located as far as 80 km from Klaipėda Port.

Estonian north-east cluster, composed of seven emission sources (four plants produced only fossil emissions and three power co-generation plants using both oil shales and biomass for energy production) will use CO₂ pipeline or truck/train transport to Sillamäe and Kunda ports and then ship CO₂ to the E6 storage site in Latvia (615 km by ship from Sillamäe).

This cluster will be able to capture and store annually 11.1 t CO₂, including 9 Mt of fossil and 2.1 Mt of bio-CO₂.



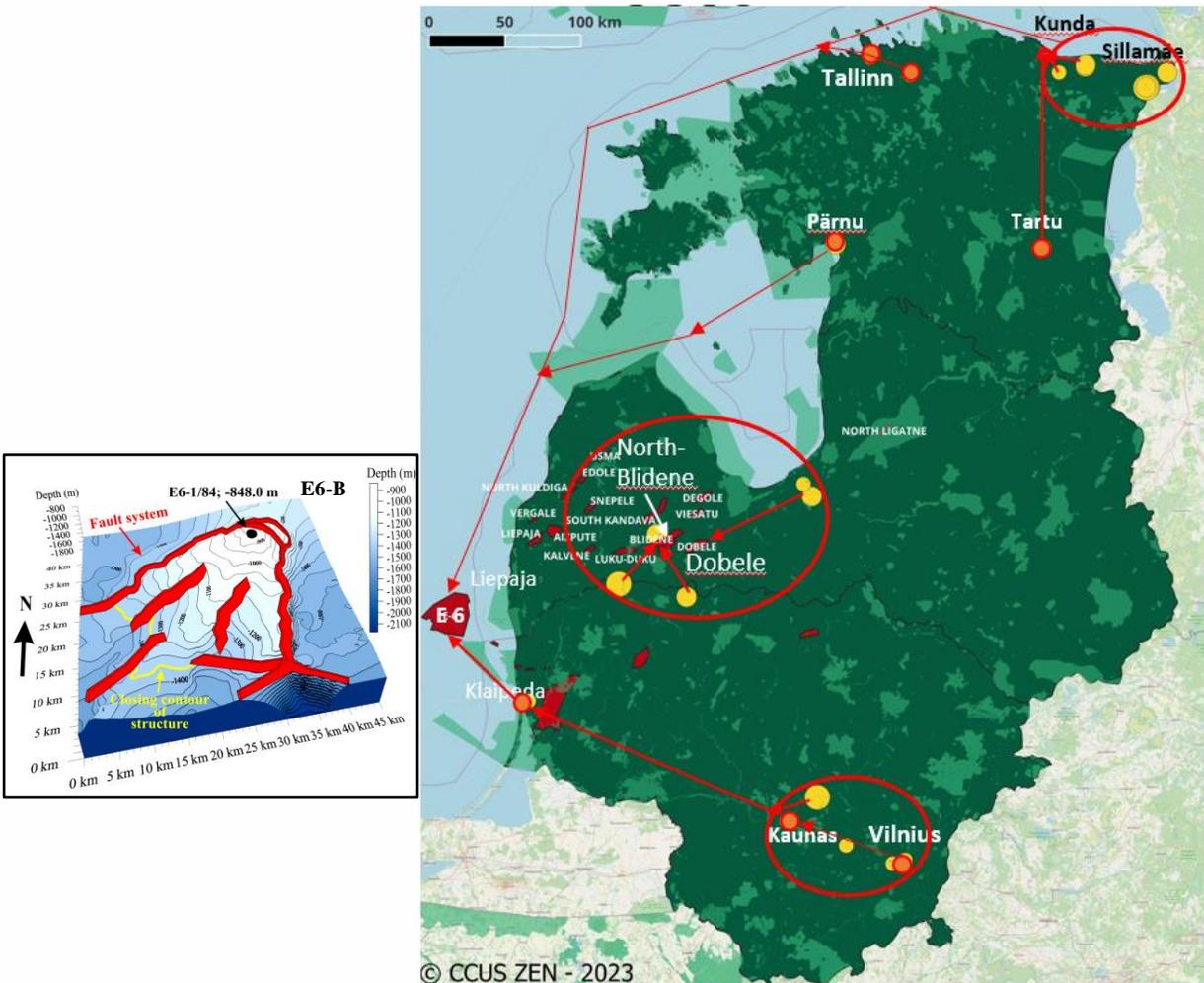
N	Cluster Name	Number of emitters	Fossil CO ₂ Mt	Bio- CO ₂ Mt	Total CO ₂ Storage site	Capacity Opt/Cons. Mt	Trans- port
1	Latvian Onshore	3	1.0		Dobele	106/21	
2	Lat-Lit Onshore	Pipelines 150	3.25		North-Blidene	267/35.6	
3	Est-Lit Offshore	Pipelines 15-185			& Blidene E6A	29.6/17.8 365/146	
E6		20 Pipelines 30-140 Ship 80-645	9.45	2.21			11.66
Total produced		26	13.7	2.21	15.91	767.6/220.4	
Total stored		26	13.02	2.1	15.23		



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Baltic offshore scenario

Carbon Neutral Scenario for the Baltic States



Among CO₂ use options:

- The alternative CO₂ use option for Estonia is the application of CO₂ for mineral carbonation of Estonian burned oil shale (BOS) (Shogenova et al, 2021).
- Another option is the use of CO₂ for geothermal energy recovery in the E6 structure for the local energy needs of the drilling rig. More details you could see yesterday in our Poster presentation.
- All Baltic countries are looking forward to produce hydrogen.
- It can be stored in the smaller E6-B compartment of the E6 structure offshore (Figures 1-3).

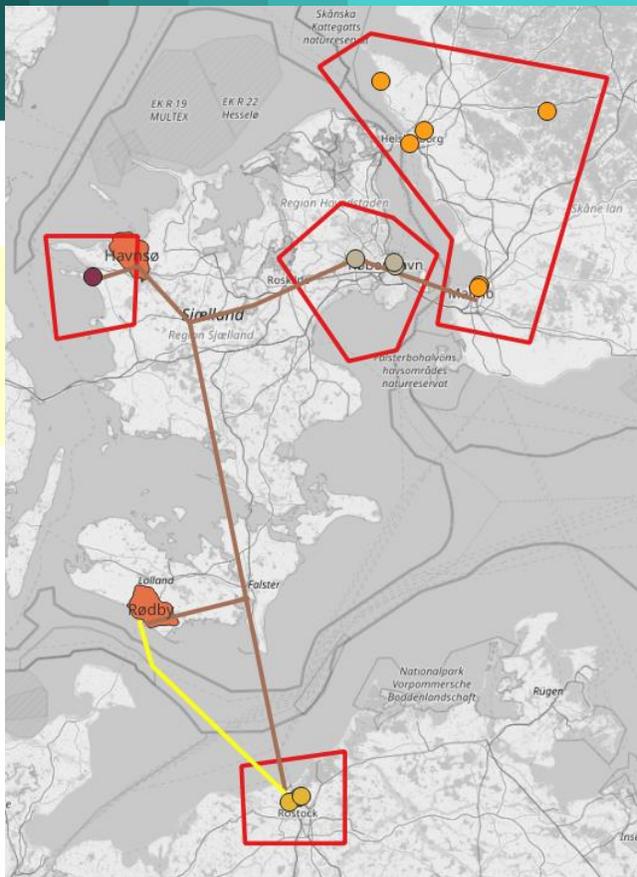
N	Cluster Name	Number of emitters	Fossil CO ₂ Mt	Bio- CO ₂ Mt	Total CO ₂ Mt	Storage site	Capacity Opt/Cons. Mt	Trans- port km
1	Latvian Onshore	3 Pipelines	1.0		1.0	Dobele	106/21	
2	Lat-Lit Onshore	3 Pipelines	3.25		3.25	North-Blidene	267/35.6	
3	Est-Lit Offshore E6	20 Pipelines	9.45	2.21	11.66	& Blidene E6A	29.6/17.8 365/146	
		Ship	80-645					
	Total produced	26	13.7	2.21	15.91		767.6/220.4	
	Total stored	26	13.02	2.1	15.23			

Baltic 3

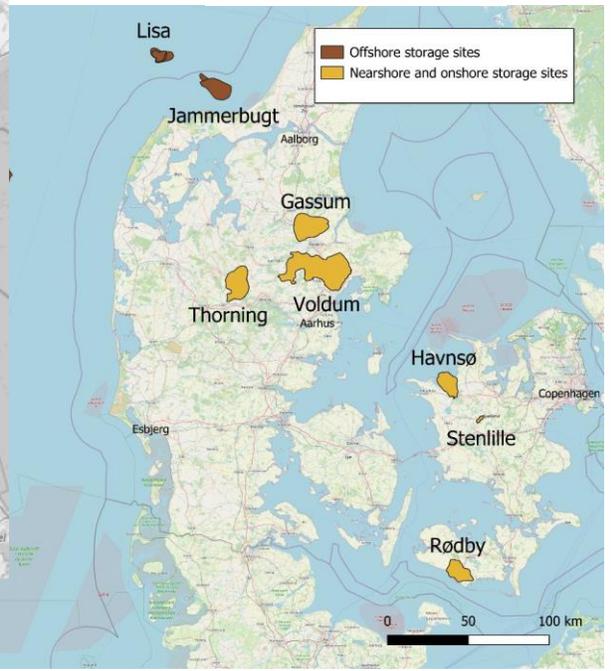
- Baltic 3:
 - 4 clusters with 13 emitters
 - Maximum emission volume: 5.7 Mt annually
 - 3 storage sites
 - Maximum storage volume: approximately 456-882 Mton
- Possible transport infrastructure includes pipeline and ship

•Potential transport alternatives:
 •Ship (yellow)
 •Pipeline (brown)

Country	Cluster	Total CO2 emissions [kton/yr]	Emitters number
Germany	Rostock Cluster	2,515.0	3
Denmark	Copenhagen Cluster	1,191.5	3
	North-western Zealand Cluster	534.0	1
Sweden	South Sweden Cluster	1,495.0	6
Total		5,735.5	13



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Storage name	On / offshore	Capacity mean (million tonnes)		Status
		P90	P10	
Havnsø	Nearshore	204	423	Seismic campaign
Rødby	Onshore	242	449	Seismic campaign
Stenlille	Onshore	10 (mean)		Seismic campaign finished



Baltic-4. North-Poland



Baltic - 4, Northern Poland, 18/11 emitters (1 cluster), 2 storage sites

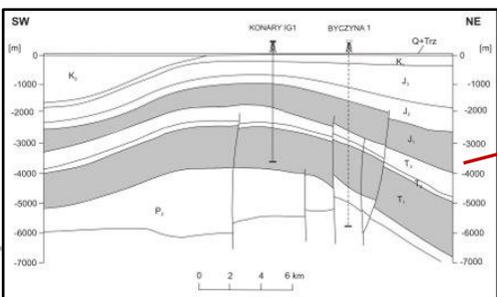
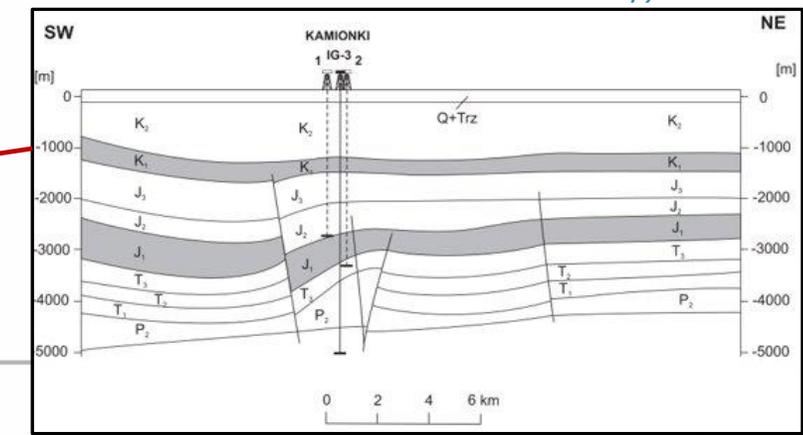
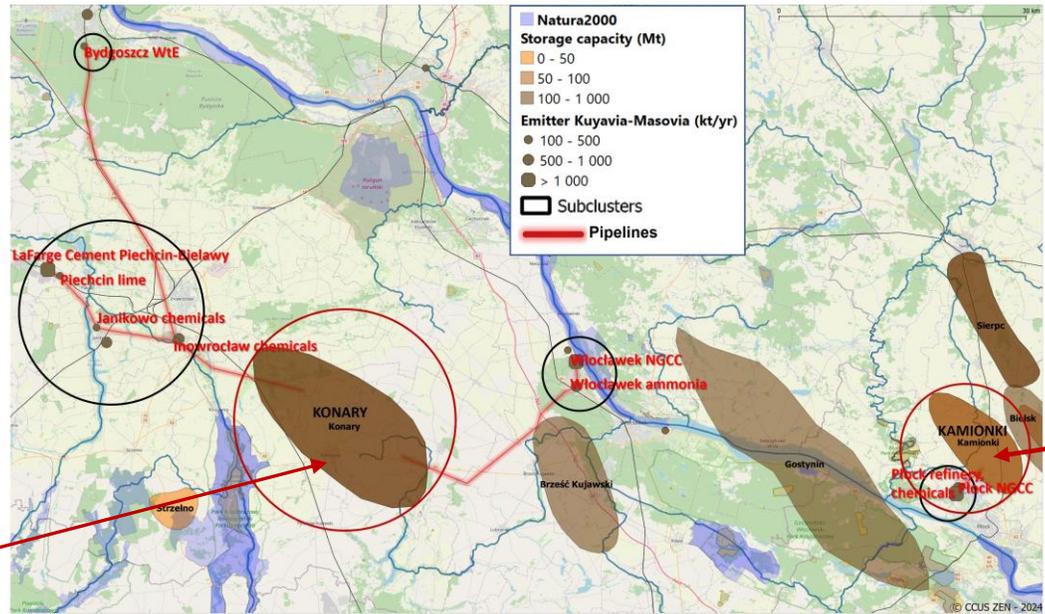
Kamionki storage site
 1) Reservoir 1: Lower **Cretaceous** sandstones, thickness ~80 m
 Porosity 20%; Permeability~400 mD
 Caprock: Upper Cretaceous ~200 m (marl, marly limestone)
 2) Reservoir 2: Lower – Middle **Jurassic** sandstones, Porosity~15%; Permeability~200 mD
 Caprock(s): Upper Aalenian to Lower Bajocian, Bathonian (secondary)



Project ID	Value chain name	Involved countries	Number of countries	Total CO ₂ emissions, Mt/y	Number of emission sources	Number of emission clusters	Storage sites	Number of storage sites	Total CO ₂ storage capacity, Mt	Total years for storage	Distance from emission sources to storage sites, km
Baltic-4	North Poland onshore	Poland	1	13.63/ 7.37	18(11)	1	Konary, Kamionki K	2	381	28/52	6.8-62.8

Konary storage site

- Lower-Middle **Jurassic** sandstones (multiple),
- total thickness ~160 m
- porosity~15%; permeability~300 mD
- caprock(s): Lower Bajocian ~71 m (claystone, mudstone),
- Bathonian (secondary)



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Regulatory readiness of the analysed value chains: Baltic Region

Among higher - readiness value chains are

- Cross-border Baltic-2 (onshore and offshore storage)
- Baltic-3 (onshore storage)
- CCUS projects with CO₂ emission sources in Denmark, Sweden and Germany and CO₂ storage in Denmark.
- **The main internal strengths of these two value chains:**
- **The high storage capacity associated with very good reservoir properties, large thickness of primary cap rocks**
- **High density of total emissions per unit distances and other strong technical parameters**
- **CO₂ capture and CO₂ use options are under development**
- **Many CCUS research and demo projects in Denmark**
- **Their main external opportunities are**
- **The favourable CCS policies and regulations and financial governmental support in Denmark, where CO₂ storage sites are located.**
- Germany, Sweden and Denmark are Contracting Parties to the London Protocol (LP),
- **Sweden and Denmark have deposited a declaration of provisional application of Amendment to Article 6**
- **The main risks**
- Among the risks for Baltic -2 and -3 is **German international regulations.**
- **Germany** has not yet deposited a declaration of provisional application of **Amendment to Article 6** with the IMO.

This, in addition to a bilateral agreement, is needed before the export of CO₂ for offshore storage.

INTERNATIONAL REGULATIONS AND CO₂ STORAGE SITES LOCATION

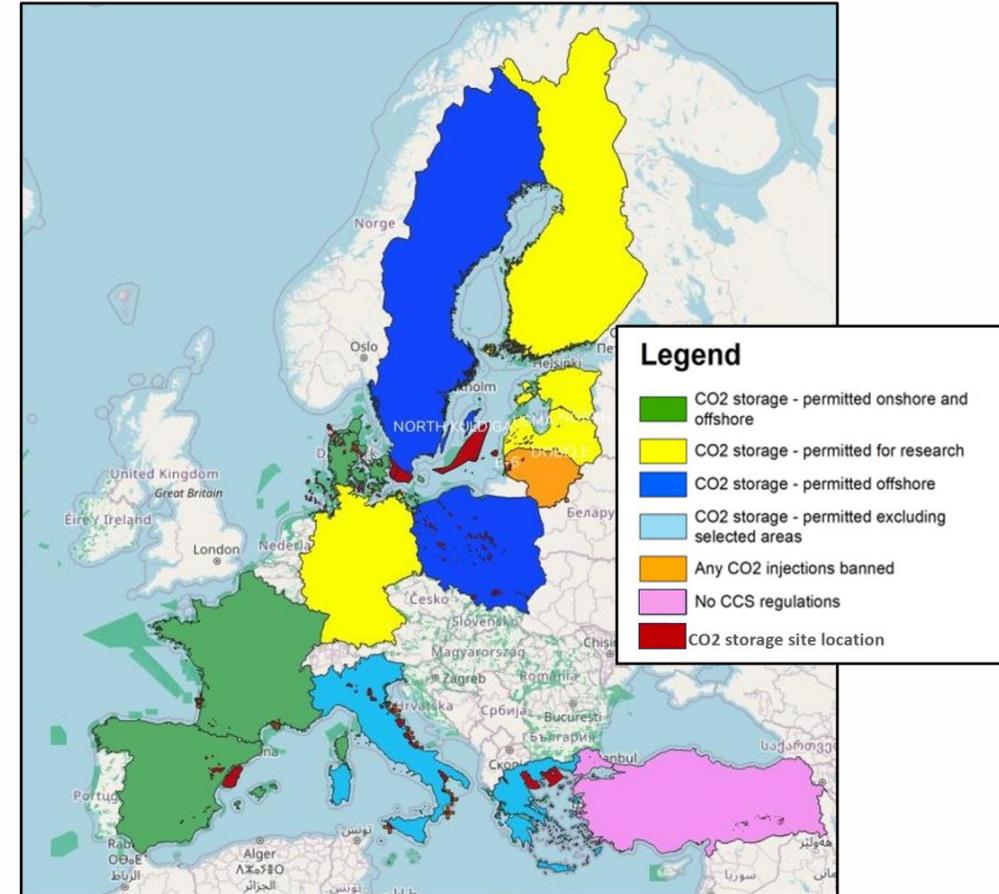


Readiness of the analysed value chains : Baltic Region

Baltic-1 value chain with CO₂ storage onshore Latvia and Baltic-4 value chain with CO₂ storage onshore Poland are categorized as less ready since they have regulatory risks:

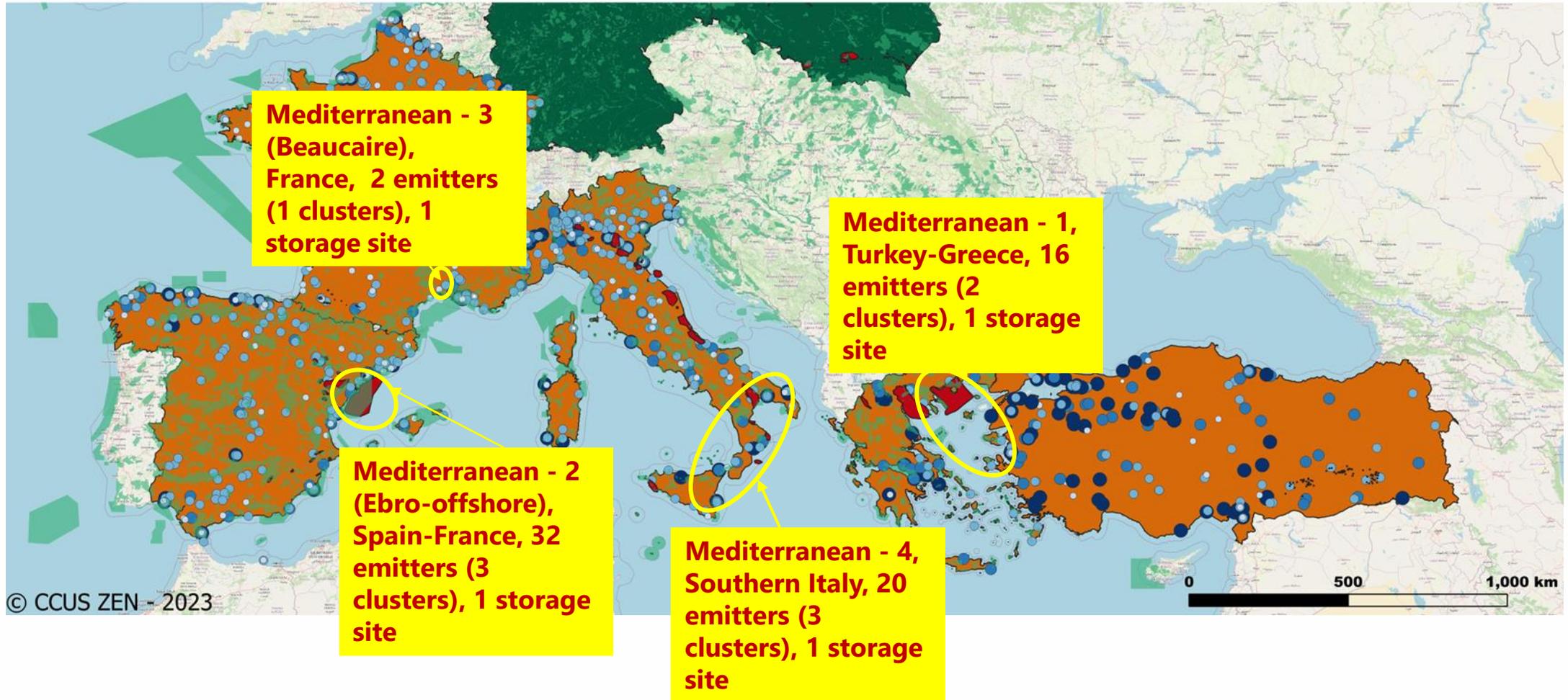
- ▶ Industrial-scale CO₂ storage is not yet permitted in Latvia
- ▶ In Poland, CO₂ storage is permitted now offshore in the Baltic Sea. However, considering that CO₂ storage in the Baltic Sea is not permitted by the Helsinki Convention, it is not possible now to inject CO₂ offshore Baltic, and regulations on onshore storage are still being developed.
- ▶ Despite the planned changes in the CCS regulations and other available technical strengths, these regulatory changes in Latvia and Poland may take additional time and the risks should be seriously considered.

National Regulations combined with CO₂ Storage Sites



Four Mediterranean clusters

Mediterranean 4 clusters



Mediterranean -1. Türkiye - Greece



CO2 emissions:

- Soma cluster and İzmir Aliaga cluster
- ## Transport routes
- Pipelines
 - Ship transport - 360 km from İzmir-Aliaga port
 - Prinos storage site in Greece
 - CO₂ could be used in production of di-methyl ether (DME) in Aliaga region as suggested by CO2Fokus project.

Prinos Basin

Areal extent: 800 km²

Saline aquifer

Rock type: Sandstone

The thickness of reservoir: 260 m

Depth: 1-3.5 km (2.4 km)

Geothermal gradient :

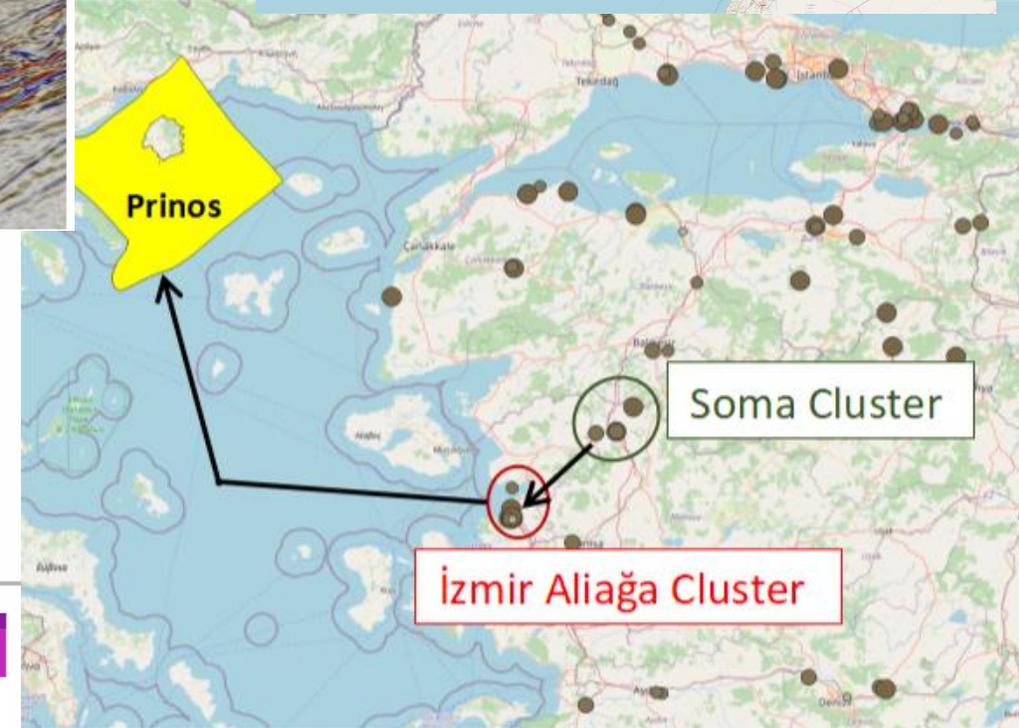
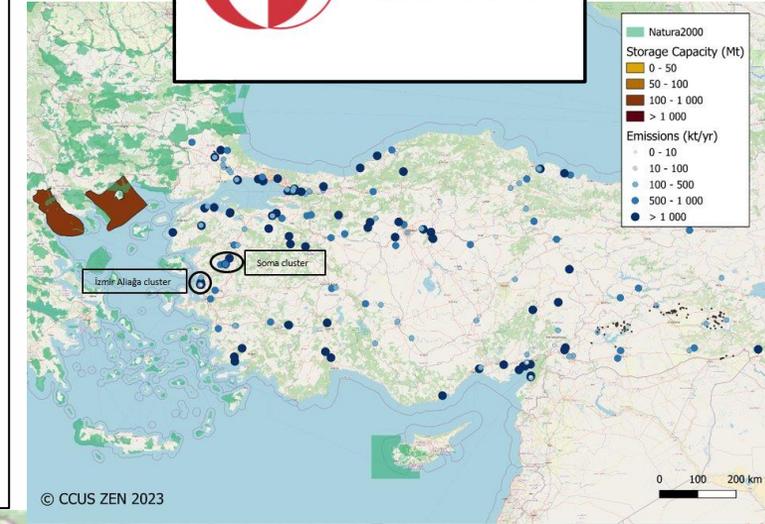
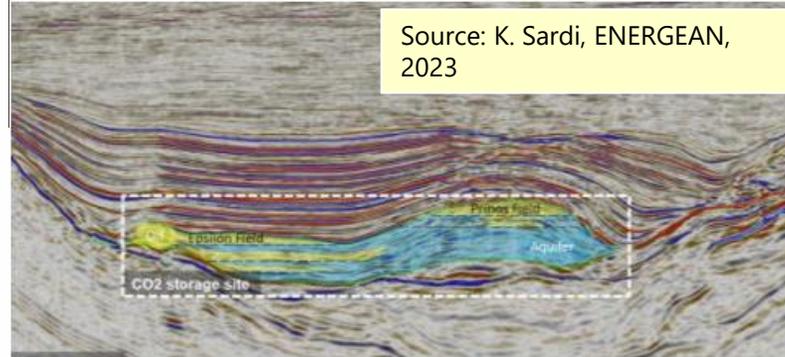
78°C/km

Porosity: 15-20% (Avg. 18%)

Permeability: 50 mD
N/G=0.8

Storage capacity: 1000 Mt

PRINOS RESERVOIR



Project ID	Value chain name	Involved countries	Number of countries	Total CO ₂ emission, Mt/y	Number of emission sources	Number of emission clusters	Storage sites	Number of storage sites	Total CO ₂ storage capacity, Mt	Total years for storage	Distance from emission sources to storage sites, km
Mediterranean -1 (M-1)	Soma - İzmir Aliaga - Prinos	Türkiye, Greece	2	40.0	16	2	Prinos	1	1000	25.0	120-360

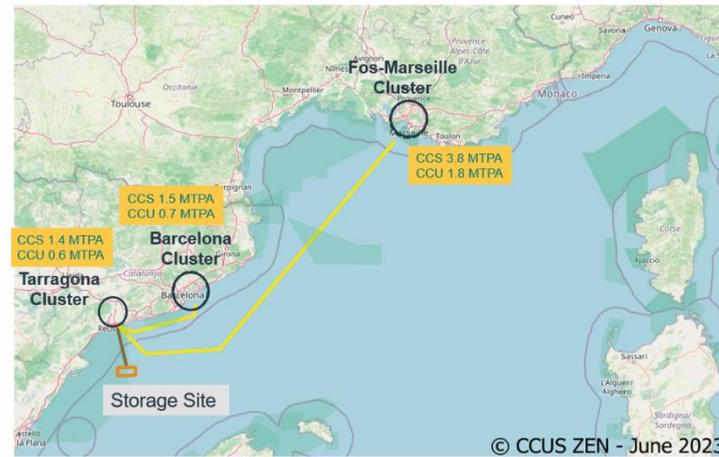
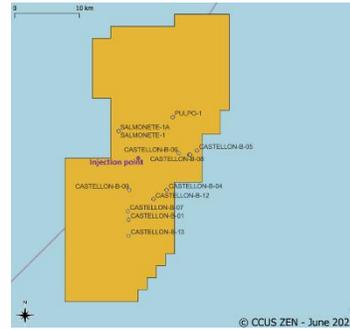


Funded by the European Union

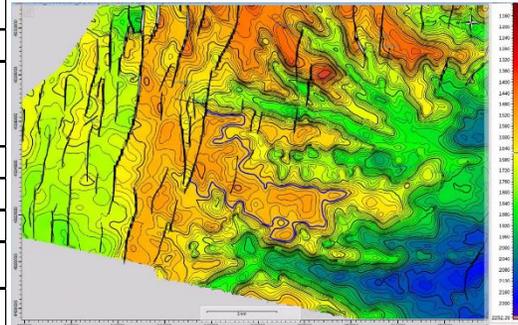


Mediterranean 2

- The Mediterranean-2 project comprises of 3 clusters of large emitters (32 emitters, producing 23.8 MtCO₂) and one storage site offshore in Spain.
- The industrial clusters:
 - Tarragona - Spain
 - Barcelona - Spain
 - Fos-Marseille cluster in France.
- Geological storage site for is located offshore Tarragona in the Ebro Basin.
- Various CO₂ utilization options are considered on the base of CCU feasibility projects in France and Spain.
- It is assumed that 9.8 Mt CO₂ will be captured, from which 6.7 Mt stored and 3.1 Mt CO₂ used

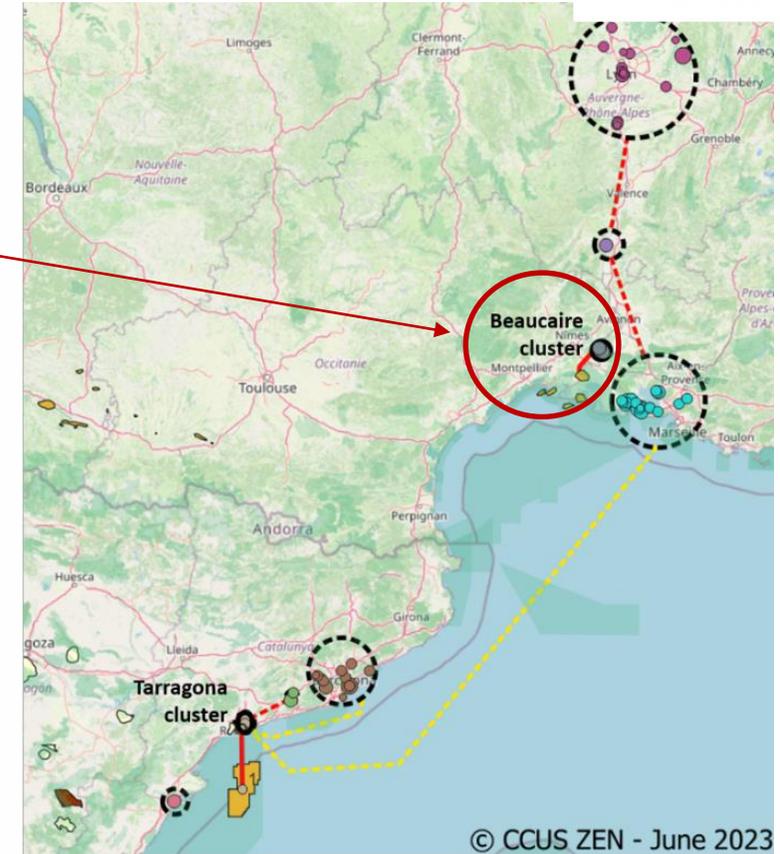


Storage site parameters	
Country	Spain
Site name	Castellon
Reservoir Lithology	Upper Miocene Castellon Sandstone
Cap rocks	Ebro Shales
Top depth	1600 m
Thickness	300-600 m
Reservoir pressure at 1600m	16 Mpa
Reservoir temperature at 1600 m	74 °C
Porosity	14-20 %
Permeability	0.010-0.500 D
Average Storage Capacity	>200 Mt CO ₂



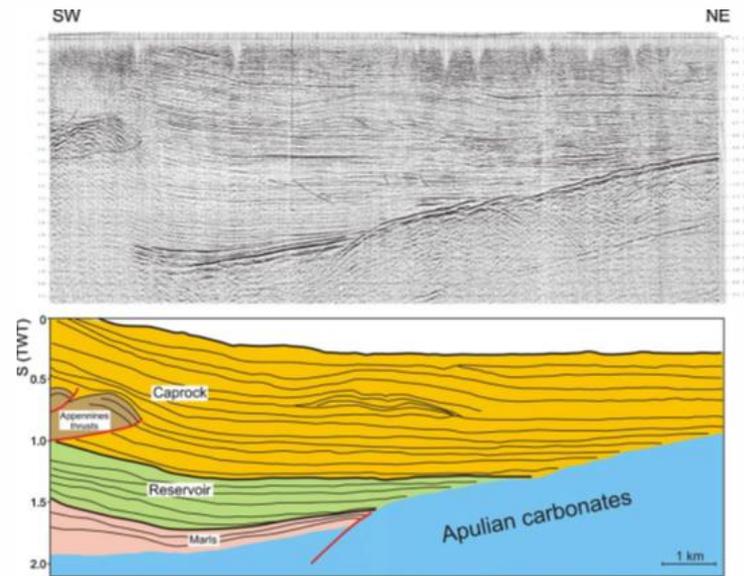
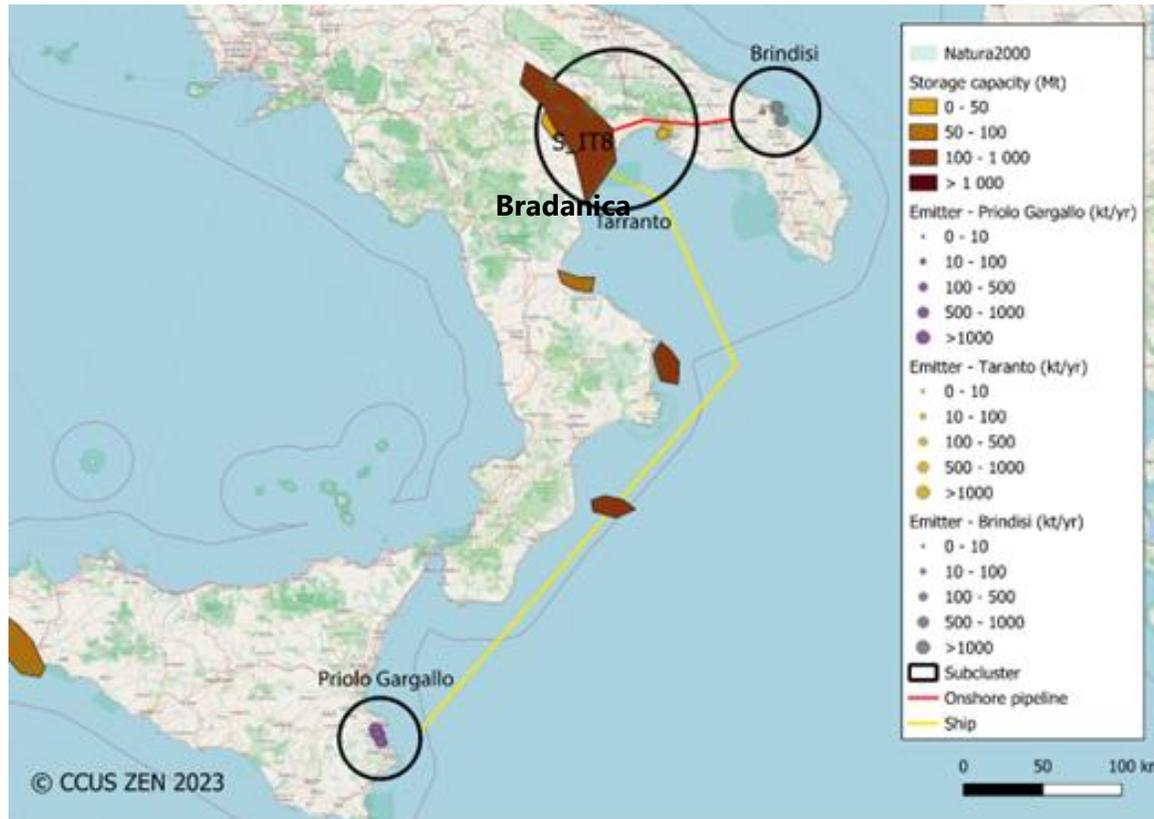
Structural map of the Castellon storage site (source: PilotSTRATEGY project – Gravaud & Canteli, 2023)

- The **Beaucaire value chain** is a local-scale scenario with two emitters (a paper plant and a cement plant) emitting 1.17 Mt/y
- The storage is onshore saline aquifer site Haut d'Albaron, with a storage capacity 34 Mt.
- Onshore pipeline of total length 32.6-38.5 km.
- Proximity with protected area is taken into account.
- In the Beaucaire area, CO₂ use for catalytic methanol production can be considered with a potential of 200 kt CO₂/y.



- Location of Tarragona and Beaucaire clusters, transport pipelines and storage sites. In dashed lines are potential extensions of the CCUS project.

- CCUS value chain from Southern Italy, with three emitters clusters:
- Brindisi, Taranto and Priolo Gargallo.
- Transport to onshore storage site.
- Ship transport is marked from Priolo Gargallo
- Pipelines from Brindisi and Taranto.



Bradanica storage site:

- Reservoir: Late Pliocene sands and silty sands with marl, locally more than 800 m thick, effectively 650 m thick.
- Caprock: Clay and silty clay, 1500 m thick in places.
- Storage capacity: with efficiency of 1% - 344 Mt, 4% - 1376 Mt.

Project ID	Value chain name	Involved countries	Number of emitter clusters	Total CO ₂ emissions, Mt/y	Number of emission sources	Number of emitter clusters	Storage sites	Number of storage sites	Total CO ₂ storage capacity, Mt	Total years for storage	Distance from emission sources to storage sites, km
Mediterranean -4 (M-4)	Southern Italy (Taranto, Brindisi, Priolo Garalo)	Italy	1	26.51	20	3	Bradanica	1	344-1376	7.8 - 19.0	50 - 450



Readiness of the analysed value chains:

Mediterranean-2, 3 and 4 value chains, which include emission sources and storage sites in Spain (M-2), France (M-3) and Italy (M-4), are assessed as more ready at regulatory side than M-1.

- ▷ **Mediterranean-1 including CO₂ emissions from Türkiye and CO₂ storage in Greece as less ready, considering the regulatory risks:**
- ▷ There is a lack of CCS regulations and CO₂ capture and transport infrastructures in Türkiye.
- ▷ **Türkiye and Greece are not Contracting Parties to the London Protocol** and are therefore not bound by its requirements for cross-border CO₂ transport
- ▷ **France, Spain and Italy are members of the LP.**
- ▷ **Italy is planning to implement Amendment and provisional application to the Article 6.**

However technical and geological parameters of the storage sites in M-3 are not satisfied to the known requirements

Some projects in both regions have also technical risks for the area around storage site (external group 1):

For Italy seismic risks should be checked for the storage site areas.

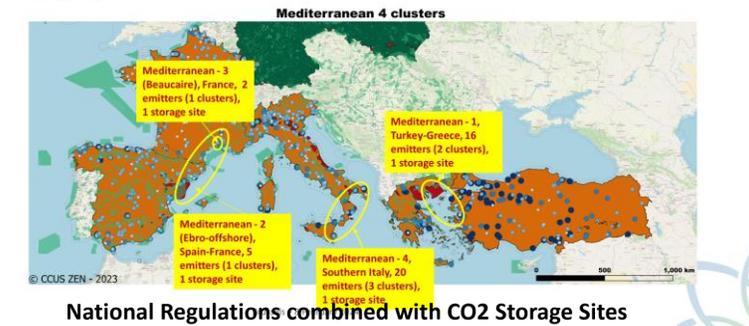
Most countries have risks connected with location of Natura 2000 areas close to the storage sites or intersected with storage sites.

The study will be finalized with an overview of readiness and recommendations for advancing ready and less ready cases toward CCUS implementation.

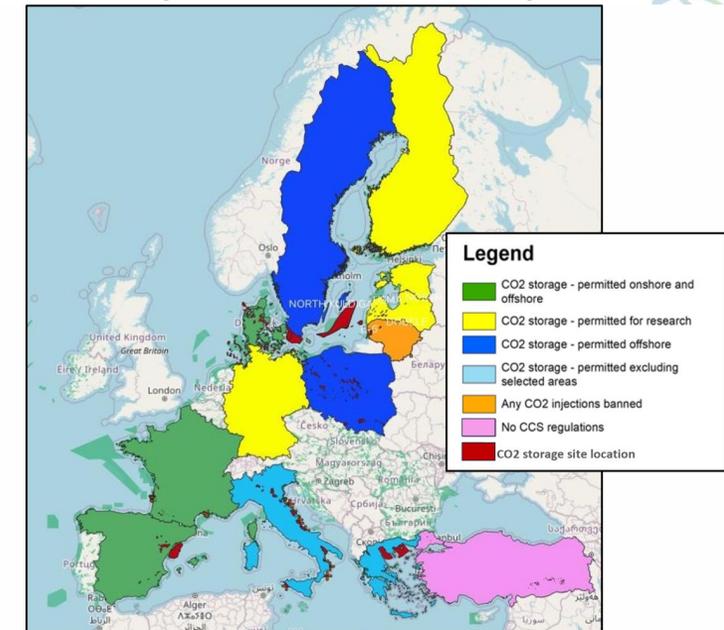
Using multivariate SWOT analysis, quantitative estimations will be also applied.



Four Mediterranean clusters



National Regulations combined with CO2 Storage Sites



Overview of parameters in the analysed values chains

Project ID	Value chain name	Involved countries	Number of countries	Total CO ₂ emissions, Mt/y	Number of emission sources	Number of emission clusters	Storage sites	Number of storage sites	Total CO ₂ storage capacity, Mt	CO ₂ transport Distance, km	Regulatory problems	
											National	International
Baltic-1	Baltic Lat-Lit-onshore	Latvia, Lithuania	2	4.25	6	2	North Blidene, Blidene and Dobele	3	403	9-150	✓	
Baltic-2	DE DK SWE Jutland network	Germany, Denmark, Sweden	3	20	33	9	Gassum, Voldum, Jammerbugt Inez, Bifrost, Greensand, Lisa, Thorning	8	928	5-750		✓
Baltic-3	Copenhagen	Germany, Denmark, Sweden	3	5.9	16	4	Rødby, Havnsø, Stenlille	3	657	5-115		✓
Baltic-4	North Poland onshore	Poland	1	13.6/7.4	18(11)	1	Konary J, Kamionki K	2	381	7-63	✓	
Mediterranean - 1 (M-1)	Soma - İzmir Aliğa - Prinos	Türkiye, Greece	2	40.0	16	2	Prinos	1	1000	120-360	✓	✓
Mediterranean - 2 (M-2)	Ebro offshore	Spain, France	2	24	32	3	Castellon	1	>200	50-450		
Mediterranean - 3 (M-3)	Beaucaire	France	1	1.17	2	1	Haut d'Albaron	1	34	27		
Mediterranean - 4 (M-4)	Southern Italy (Taranto, Brindisi, Priolo Garalo)	Italy	1	26.51	20	3	Bradania	1	344-1376	50 - 450		
Total range for all clusters			1-3	1.2 -40	2-33	1-9		1-8	34-1400	5-750		



HERCCULES
full CCUS chain demonstration

> THANKS FOR YOUR ATTENTION