Le cœur de vos énergies

WEBINAR

16 December 2025

Inter-regional transport of CO_2

Launch of the Call for interest in the market

Rules for proper operation

This webinar is recorded. A replay will be available in the next few days on the NaTran website dedicated to this initiative. By participating in this webinar, you agree to be recorded for the purposes of capturing a video which will be available as a replay on the NaTran website.

Microphones muted

Ask your questions in the Q&A section: specify "NAME First name, entity, question" in the question. Questions will be published as they come in.

We will be answering all questions, either live (in writing or orally) or on our NaTran website at a later date.

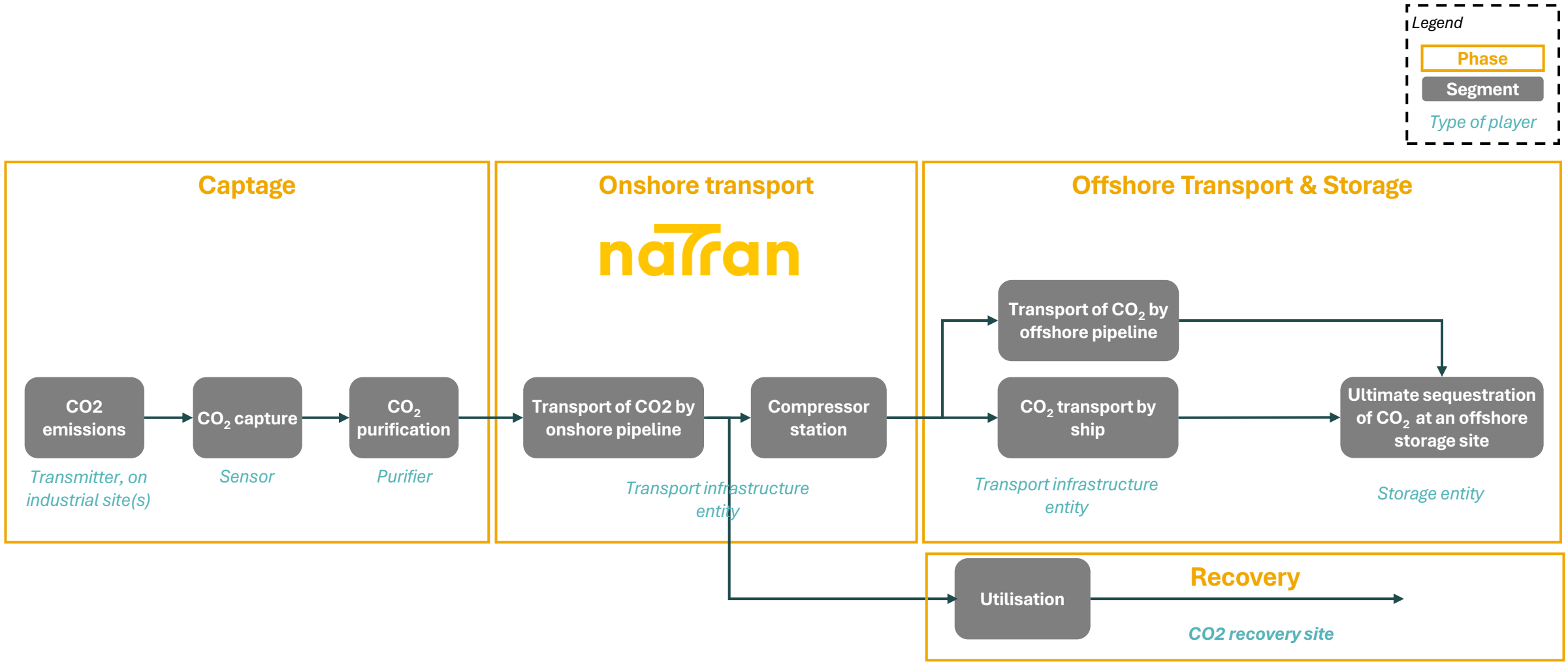
Webinar agenda

- Rules for proper operation, Stéphane MAUREL
- Introduction, Geoffroy ANGER
- The decarbonisation of industry in France and the territorial approach, Pierre-Yves LE STRAT
- Infrastructure characteristics, Stéphane MAUREL
- Project development phases, Pierre-Yves LE STRAT
- How the Call for interest works, Pierre-Yves LE STRAT
- Our answers to your questions

Introduction

Geoffroy Anger

NaTran's position in the CCUS chain



The context

Decarbonisation of the industry in France

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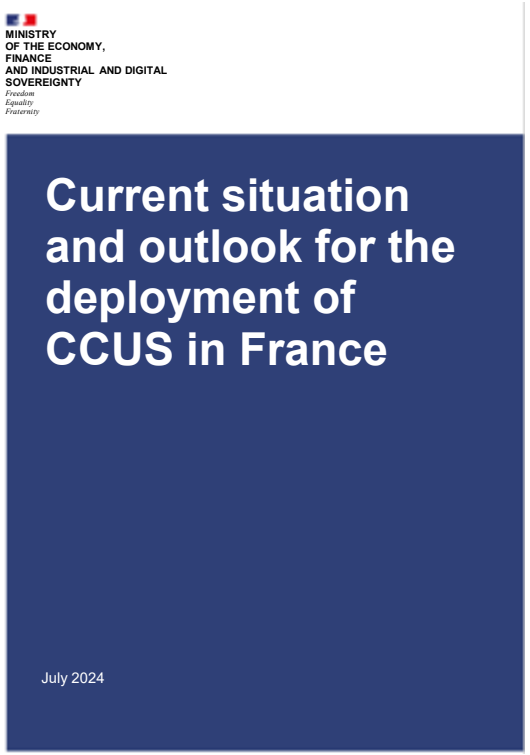
Decarbonising industry: a national trajectory to be implemented

CCS

a key lever for achieving carbon neutrality

- Solution for sectors with hard-to-abate CO2 emissions
- Support for bioenergy Carbon Capture and Storage (BECCS)



Target: 45% reduction in industrial emissions by 2030, then carbon neutrality by 2050

- First: deployment of CCS chains by 2030 at **port hubs** where emissions are concentrated and difficult to reduce.

2030
4 to 8 Mt CO2/year

- Then: capture for more dispersed emitters, development of **new CO2 hubs by extending CO2 transport infrastructures (CO2 valleys)**.

2030-2040
12 to 20 Mt CO2/year

- Lastly: a **network of CO2 infrastructures on a national and European level**, the development of negative emissions...

2040-2050
30 to 50 Mt CO2/year

2024 - 2025: levers and removal of obstacles to develop CCS chains

The French government has signed agreements with Denmark *(capacity of 23 $GtCO_2$)* **and Norway** *(80 CtCO2) to transport and store CO2 in these countries*

GOUVERNEMENT
Liberté
Égalité
Fraternité

FRANCE 2030

Launch of the GPID mechanism in 2024

- Waiting for the results of the GPID 2024 call for tenders
- Consultation between May and September 2025 for a new GPID call for tenders in early 2026

European Commission

Legislative work on the CO2 market and infrastructure announced by the European Commission for 2026

- Aims to create a coherent and favourable framework for CCUS investments
- Upstream public consultation underway (deadline January 2026)

Vision shared by NaTran, Teréga and French stakeholders

during the national consultation on long-term CO2 infrastructure, organised to define the public policies

The NaTran project

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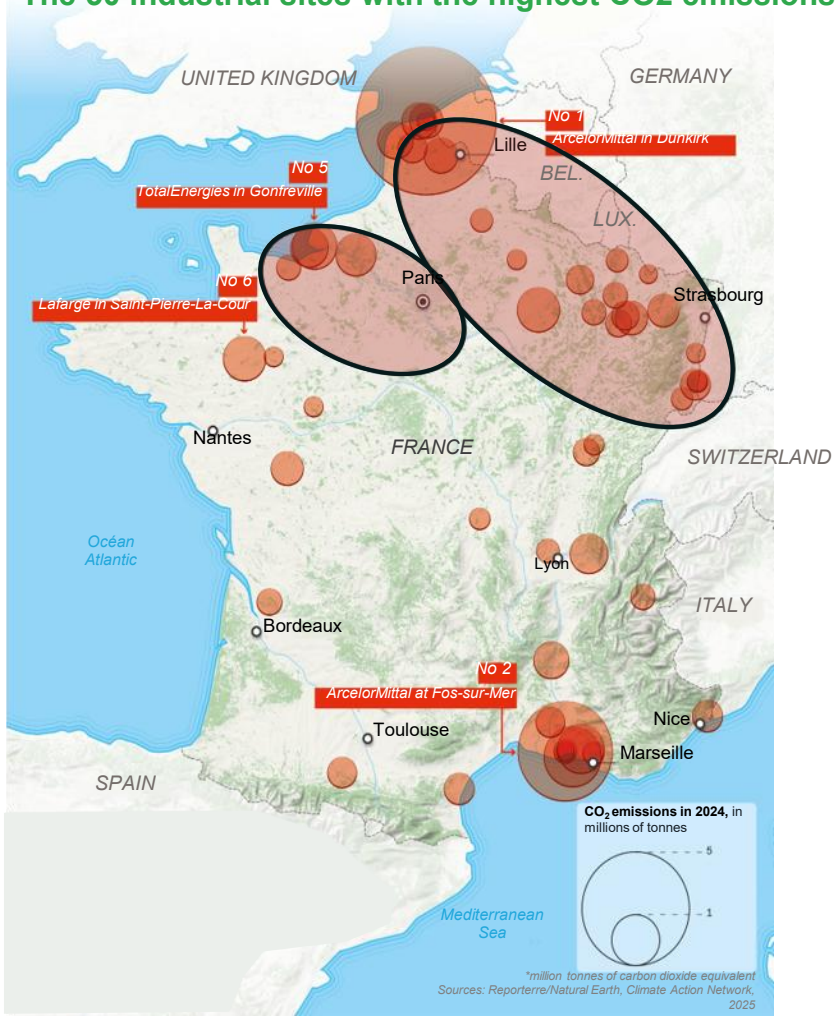
The territorial approach

Pierre-Yves Le Strat

Transporting CO2,

A competitive logistics offering for regions thanks to economies of scale

The 50 industrial sites with the highest CO2 emissions



The finding:

- Centralised emissions in port-industrial areas, which serve as outlets for the exporting CO2 to permanent storage sites.
- But also industrial emitters located relatively far from these hubs, including sources of biogenic CO2, or CO2 valorisation projects (e-SAF, e-fuel, e-methanol, etc.), **with no visible CO2 transport solutions.**
- **The challenge establishing CCUS value chains and therefore ensuring the most competitive CO2 transport possible.**

NaTran's response:

- ✓ **The development of a shared infrastructure in northern France to aggregate volumes and provide a competitive CO2 transport logistics through economies of scale.**
- ✓ **With a major advantage: a large-scale offshore pipeline export hub project from Dunkirk (NaTran / Equinor partnership) to storage capacities in the North Sea.**

NaTran's CO2 infrastructure

Pierre-Yves Le Strat

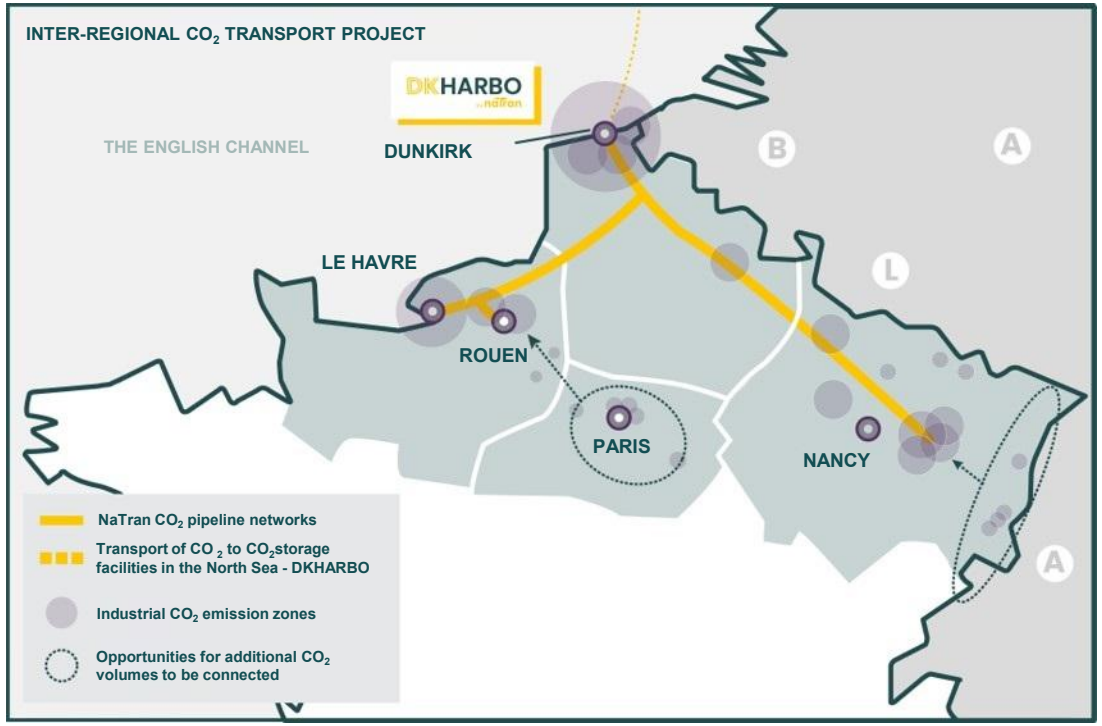
Response to the needs:

- CCS projects from manufacturers in the **Grand Est, Hauts-de-France, Normandy and Île-de-France** regions
- **Aggregation of volumes** for export to North Sea storage sites
- **Logistics for CO2 valorisation projects** (CCU), including **the integration of biogenic CO2 volumes**

The proposed infrastructure is based on a study carried out by NaTran in 2025.

Need to question the market to:

- Confirm the interest in this infrastructure
- Gather all transport needs
- Refine the roadmap and deployment approach

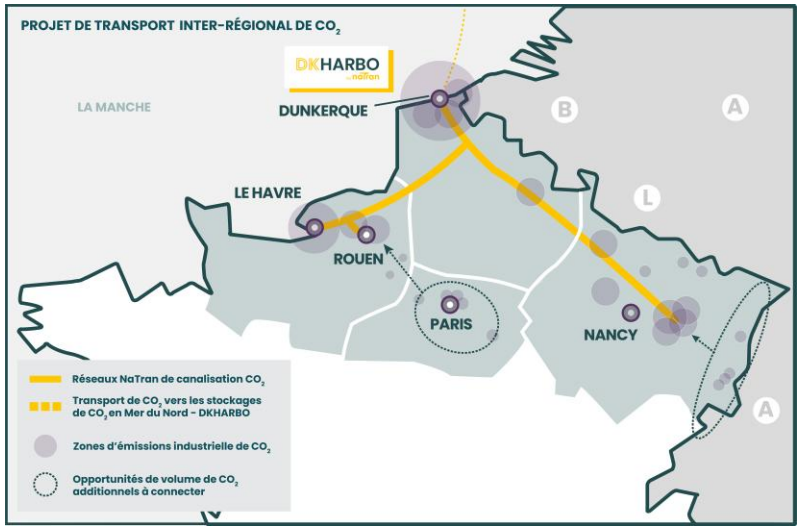


Why respond to this call for interest

Pierre-Yves Le Strat

Integrate its CCUS project(s) into an infrastructure project:

- ✓ **A shared,** open-access infrastructure, offering **economies of scale**
- ✓ A system developed **in coordination with market stakeholders**
- ✓ A project led by an **independent stakeholder** (separation of activities)
- ✓ N**on-discriminatory third-party access to the network**
- ✓ Full **transparency** : rules for participation in the development process and identical access rules for everyone



- ➢ You'll have one of the **prerequisites for applying for the** France 2030 GPID scheme. The proposed infrastructure is part of a project that has been awarded the PCI label by the EU (EU2NSEA project) and is eligible for **European CEF-E funding** to finance studies and investments.

- ➢ **You will be able to assess the conditions and costs of CO2 transport** at different stages of development, to assess the viability of your project and apply for European aid schemes (Innovation Fund, etc.).

The NaTran project

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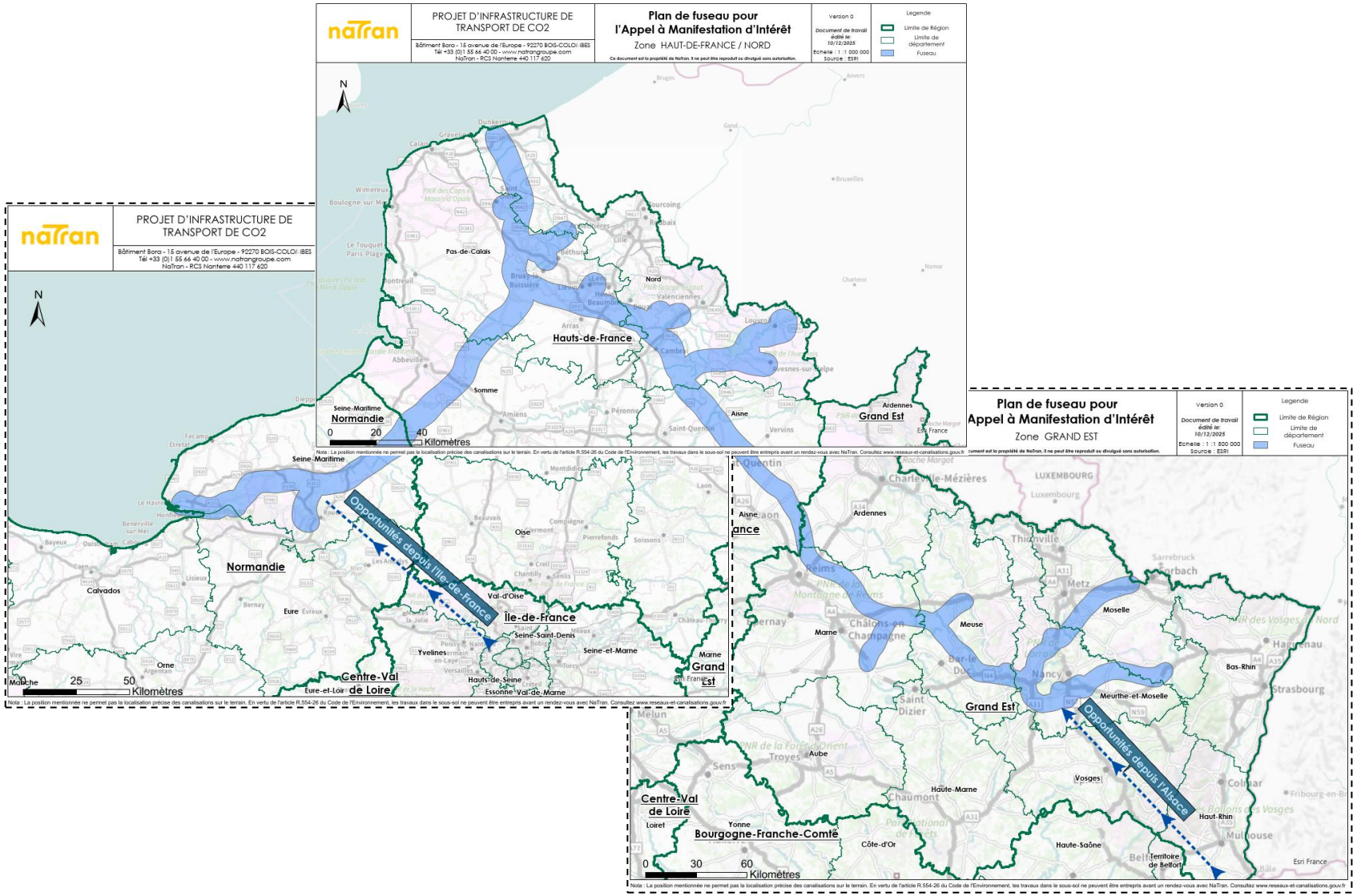
The characteristics of the proposed infrastructure

The route defined to date

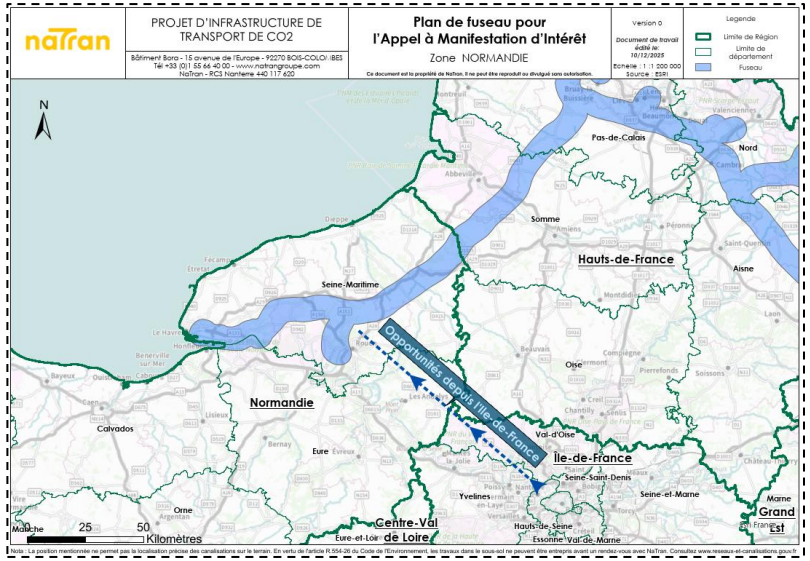
Stéphane Maurel



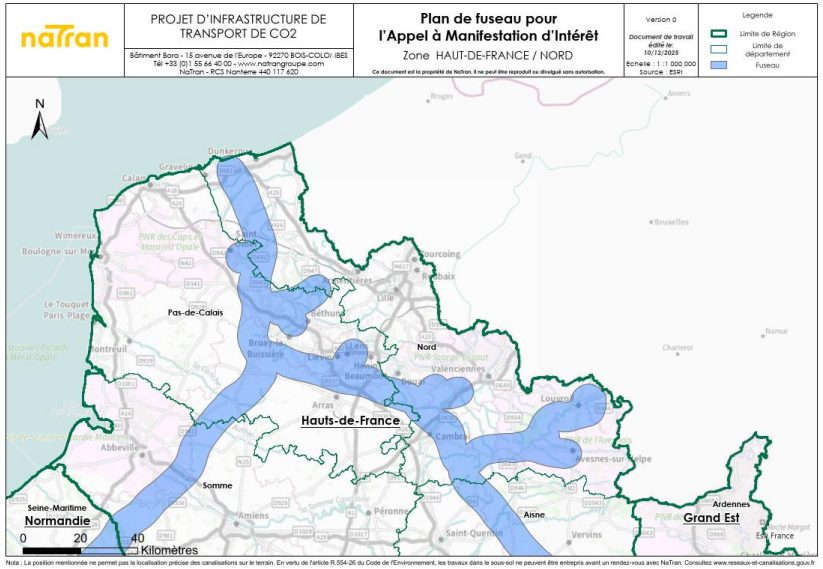
Stéphane Maurel

The route defined to date

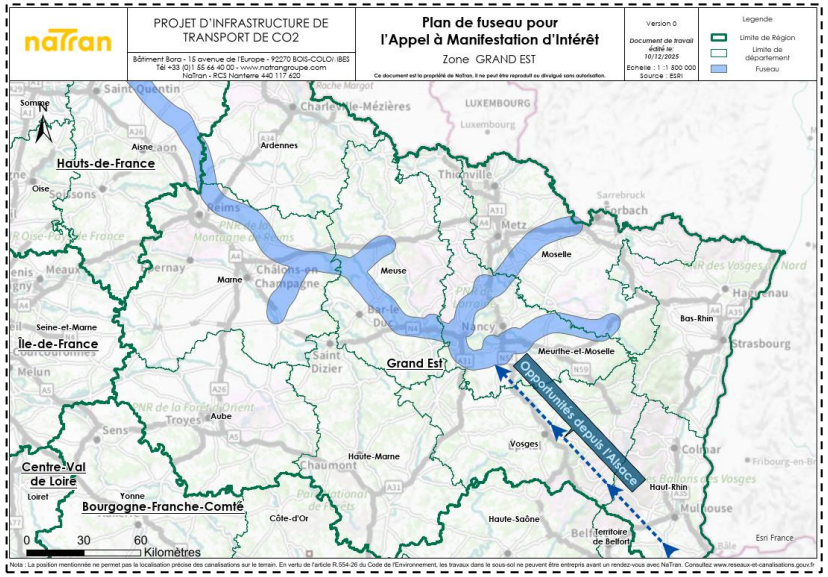
Normandy and Île-de-France regions



Hauts-de-France Region



Grand Est Region



Technical specifications

Stéphane Maurel

Conditions that apply to everyone to guarantee:

- The integrity and safety of structures over time
- System operability and reliability
- Interoperability with adjacent transport systems

CO2 quality specification applicable at network entry and exit:

- **Proposed preliminary specification to be exchanged with interested parties**
- **Includes the following component thresholds:** CO2 (> 96%), H2 , N2, Ar, CH4, CO, O2, H2S, SO3, SOx, COS, DMS, methyl-Mercaptan, total S, NOx, HCN, H2O, ethanol, methanol, MEG, TEG, amine compounds, NH3, acetic acid, formaldehyde, acetaldehyde, other aldehyde compounds, aromatic hydrocarbons (C6-10), BTEX, aliphatic hydrocarbons (C2-8 and C9-10), VOCs, mercury, cadmium, thallium, solid particles.
- Compliant with existing standards and under construction
- From studies and R&D, some of which are still ongoing

Specifications on pressure and temperature conditions

- Pmax (PMS): **35 barg**
- Operating pressure range: **18 to 35 barg**

The development phases

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Project development process: based on expressed needs - Details of the non-binding phase

Pierre-Yves Le Strat

Call for interest in the market for an inter-regional CO2 transmission network from 16 December 2025 to 28 February 2026

Confirmation of the market's interest in the infrastructure project and in carrying out a technical feasibility study

Feasibility agreement with the interested parties

Technical feasibility study to be carried out by NaTran in 2026

Launch of the project definition phase with stakeholders, leading to the binding phase

Responses to the call for interest

Results of the call for interest
Response profiles, aggregated data on volumes capture, storage and recovery
With deadlines
Prospects for bio CO2 volumes

Feasibility
of infrastructure that meets the needs of stakeholders

Basic engineering studies
to define the final infrastructure, its access and pricing conditions and move on to the binding phase

How the call for interest works

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Pierre-Yves Le Strat

Call for interest in the market: in brief

Perimeter

The Hauts-de-France, Grand Est, Normandy and Île-de-France regions, even if not in the immediate vicinity of the proposed corridor

Targets, whatever the project development phase

- Industrial sites with CO2 capture projects (fossil or biogenic),
- CO2 utilisation projects (CCU), whatever their level of development
- Projects for other modes of transport, including multimodal CO2 terminals for collection upstream of the chain, particularly from more dispersed sources of biogenic CO2.
- Sovereign storage projects

Launch of the call for interest: 16/12/2025 - Duration: from 16/12/2025 to 28/02/2026

Answers online on the NaTran's web page of the call for interest: link

Call for interest: responses provided using the online form

Pierre-Yves Le Strat

Company information and contact	• Name and address, • Contact person, Position • Contact details
Project information	• Name of site(s) • Specific addresses • Type of site: CO2 emitter/utilisation/Logistics, export terminal/Sovereign storage • Direct emitter or representative • Project status
Transport needs	• Volume/flow of CO2 to be transported for each site • Deadline for needs
If CO2 emitter	• % biogenic CO2 in the long term • If known: desired network exit point(s) and associated flow rate(s)
Details and comments on the project and the needs	Regarding flow profiles, CO2 characteristics/quality, operating conditions constraints, etc.

✓ **Responses to the call for interest are confidential. An NDA can be offered to the parties who so wish.**

Steps following response

Pierre-Yves Le Strat

The project team will contact you to:

- Answer your questions
- Clarify your needs
- Propose agreements for expression of needs for the feasibility study

Opportunity to put stakeholders in contact with each other if the parties so wish

- Emitters / Export point
- Emitters / Valorisation projects
- CO2 emitters or users / Complementary logistics

Your NaTran contacts

Hauts-de-France and Grand Est regions

Xavier Cordier and Jérôme Guichard

Normandy and Île-de-France regions

Chrystel Machu

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Answers to your questions

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