

Europe – Energy Transition Executive Brief

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Scope & method: This 2-page brief synthesizes headlines from the internal tracker and complements them with verified, public updates to frame technology, permitting and policy trends relevant to Europe.

Carbon Capture, Transportation and Storage (CCUS)

Recent headlines indicate that CCUS remains closely linked to hydrogen and industrial decarbonisation rather than developing as a fully standalone market. The UK's National Wealth Fund commitment to low carbon hydrogen, green steel and carbon capture highlights policy-driven integration of CCUS into wider industrial transition strategies. At the same time, the cancellation of Equinor's EU-backed 1 GW blue hydrogen project in the Netherlands underscores persistent risks related to cost, regulatory uncertainty, and infrastructure coordination. More broadly, CCUS deployment in Europe continues to depend on large anchor projects (steel, refining, power generation) and on public co-funding mechanisms. Outside the file, the North Sea region is progressing with shared CO₂ transport and storage hubs (e.g., Northern Lights, Porthos), but timelines remain tight relative to 2030 climate targets. The strategic challenge remains scaling transport and storage networks fast enough to support hydrogen and synthetic fuel value chains without creating stranded assets.

Low Carbon Hydrogen

Low carbon hydrogen dominates the dataset, reflecting Europe's focus on regulatory frameworks, subsidies, and infrastructure build out. Key developments include the European Hydrogen Bank contracts, national subsidy schemes in France, Spain and Italy, and Germany's move to tender 12 GW of hydrogen ready gas power plants. Infrastructure is progressing unevenly: cross border pipeline initiatives (German–Dutch, Nordic Baltic, Danish backbone) show momentum, while project delays and cancellations (Scottish green hydrogen halt, Equinor blue hydrogen cancellation) reveal market fragility. High production costs and insufficient offtake commitments are explicitly cited as obstacles to Germany meeting its 10 GW target by 2030. Externally, global competition is intensifying, with large-scale projects in the US, Middle East and India offering lower-cost supply. Strategically, this highlights the need for stronger demand-side instruments, long-term offtake guarantees, and tighter alignment between infrastructure planning and industrial consumers.

e Ammonia

e Ammonia emerges as a critical export vector for hydrogen, particularly for power generation, shipping and fertilisers. Headlines such as Samsung's coal based blue ammonia plant in the US and Uniper's agreement to import 500,000 t/y of green ammonia from India confirm rapid scale up at an international level. Additionally, the EU grant to a 100 MW green hydrogen-and-

ammonia project in Egypt underscores Europe's increasing reliance on external supply chains. Strategically, e ammonia is becoming a cornerstone for energy security and dispatchable low carbon power, but raises questions around lifecycle emissions, certification, and geopolitical dependence.

e Methanol

e Methanol developments are strongly demand-driven, especially by shipping and chemicals. Maersk's completion of its methanol-powered dual fuel fleet illustrates how first movers are shaping fuel markets. Europe's largest green hydrogen-based methanol facility relocation of a from Belgium to China due to methanol availability sign supply constraints in Europe. Methanol is increasingly seen as a transitional fuel due to its easier handling compared to hydrogen. For Europe, the strategic implication is clear: insufficient domestic e methanol capacity risks industrial relocation and loss of competitiveness in downstream sectors.

e SAF (Sustainable Aviation Fuel)

e SAF is emerging rapidly but remains highly sensitive to regulation and certification. The €1 bn+ Nordic e SAF project announcement represents one of the largest initiatives globally, signaling strong confidence in future aviation demand. ReFuelEU Aviation are accelerating interest, but cost gaps versus fossil jet fuel remain significant. Strategically, e SAF will depend on stable, clearly enforced sustainability criteria and long-term airline offtake agreements to move from flagship projects to industrial scale.

Renewable Fuels

Beyond aviation and shipping, renewable fuels are expanding into road and industrial transport. Daimler's plan to deploy liquid hydrogen trucks, Germany's €220 m support for hydrogen refueling stations, and Hyundai trucks exceeding 20 million km in Europe point to growing operational maturity. Nevertheless, infrastructure roll out remains slower than vehicle deployment. The strategic question is whether Europe can sustain parallel pathways without fragmenting investment and delaying scale.

Eventual Others

Significant "other" themes include electrolyser manufacturing, industrial policy, and political alignment. The EU's "Made in Europe" rules for electrolyzers, large French and Spanish subsidy approvals, and major orders secured by European suppliers (e.g., Thyssenkrupp Nucera's 300 MW order) indicate a strong push to localize supply chains. Political shifts, such as the pro hydrogen coalition in the Netherlands and criticism from the French president regarding regulatory complexity, highlight that policy stability is as critical as funding. These factors will strongly influence project bankability and investor confidence.

Other Relevant Developments

Key developments outside the predefined themes include:

Expansion of hydrogen-based steelmaking support (e.g., increased funding for Salzgitter), linking hydrogen directly to industrial competitiveness.

Ongoing debate around CBAM treatment for hydrogen-based fertilizers, affecting international trade and cost pass through.

Increasing role of offshore hydrogen concepts in the North Sea, potentially reshaping future infrastructure planning.

Strategic Summary

Overall, the news confirms that Europe's energy transition is entering a scale-up but high risk phase. Hydrogen and e fuels are moving from pilot projects to first-of-a-kind industrial assets, yet cost, regulation, and infrastructure gaps remain critical bottlenecks. For energy and industrial players, the main opportunities lie in integrated projects combining production, transport and guaranteed offtake, as well as in enabling technologies such as electrolyzers, turbines, and balance of plant systems. From a strategic perspective, winners will be those able to navigate regulatory complexity, secure long-term demand, and position themselves within emerging cross border European and global value chains.

Item n°	Workstream	News title used in the brief	Date	Source
1	Low Carbon Hydrogen	German, Dutch gas operators agree framework for cross-border hydrogen pipelines	05-ene-26	Link
2	Low Carbon Hydrogen	Norwegian Hydrogen lines up maritime buyer for its green H ₂ project	07-ene-26	Link
3	Low Carbon Hydrogen	No RFNBO requirements France unveils new rules for 1GW of national clean hydrogen subsidy auctions	07-ene-26	Link
4	e-Fuels	Nordic firms announce massive €1bn-plus e-SAF project that would be one of world's largest	09-ene-26	Link
5	Low Carbon Hydrogen	Uniper plans to take final investment decision on long-delayed Dutch green hydrogen project this year	09-ene-26	Link
6	Low Carbon Hydrogen	Shell's 200MW Dutch green hydrogen plant and associated pipeline to refinery 'nearly complete': Gasunie	09-ene-26	Link
7	Low Carbon Hydrogen	UK gas distributor unveils plans for 150km hydrogen pipeline in northeast England to supply industrial users	12-ene-26	Link
8	Low Carbon Hydrogen	Germany to tender 12GW of hydrogen-ready gas-fired power plants this year after EU agreement	16-ene-26	Link
9	Low Carbon Hydrogen	Europe's largest green hydrogen-based methanol facility secures extra finance through bridge loan	20-ene-26	Link
10	Low Carbon Hydrogen	Developers of planned 2,500km Nordic-Baltic hydrogen pipeline issue call for interest	21-ene-26	Link
11	Low Carbon Hydrogen	Plans for 70MW Scottish green hydrogen plant officially halted by developer	22-ene-26	Link
12	Low Carbon Hydrogen	High green hydrogen costs and lack of willing buyers mean Germany is unlikely to hit its target of 10GW by 2030	22-ene-26	Link
13	Low Carbon Hydrogen	Final electrolyzers installed at Galp's 100MW green hydrogen project in Portugal	23-ene-26	Link
14	Low Carbon Hydrogen	Repsol takes final investment decision on its second 100MW green hydrogen project in Spain	26-ene-26	Link
15	Low Carbon Hydrogen	Repsol places firm 200MW order with German electrolyser supplier for Spanish green hydrogen projects	27-ene-26	Link
16	Low Carbon Hydrogen	EU drafts new 'Made In Europe' rules for electrolyzers used in green hydrogen production	27-ene-26	Link
17	Low Carbon Hydrogen	EU awards nearly €177m in cross-border energy infrastructure funding to eight hydrogen projects	28-ene-26	Link
18	Low Carbon Hydrogen	Germany announces €220m of subsidies for new hydrogen refuelling stations and H ₂ -powered trucks	29-ene-26	Link
19	Low Carbon Hydrogen	Energinet begins taking capacity bookings for 133km Danish Hydrogen Backbone pipeline	03-feb-26	Link

20	Low Carbon Hydrogen	French president slams 'crazy' EU green hydrogen regulations and calls for them to be simplified	13-feb-26	Link
21	Low Carbon Hydrogen	Equinor scraps EU-backed 1GW blue hydrogen project in the Netherlands	20-feb-26	Link
22	Low Carbon Hydrogen	German government boosts Salzgitter's grant for green hydrogen-based steel project by €322m	23-feb-26	Link
23	Low Carbon Hydrogen	Polish gas operator opens consultation on national hydrogen transmission network	23-feb-26	Link
24	Low Carbon Hydrogen	EU gives green light to Spain's €440m European Hydrogen Bank boost	13-mar-26	Link
25	Low Carbon Hydrogen	Thyssenkrupp Nucera secures 300MW electrolyser order for Spain's largest green hydrogen plant	18-mar-26	Link
26	e-Fuels	Ineratec launches joint venture with French firm to build e-fuels plant in Normandy	27-mar-26	Link
27	Low Carbon Hydrogen	EU approves Italy's €6bn subsidy scheme for renewable and biomass-based hydrogen	30-mar-26	Link