

Clean Carbon University Strategic Research Group (USRG)
Showcase on Reduction and Capture
University of Southampton
10 May 2017



An update on the state of CCS in the UK and globally

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The UKCCSRC is supported by the
Engineering and Physical Sciences Research
Council as part of the Research Councils UK
Energy Programme

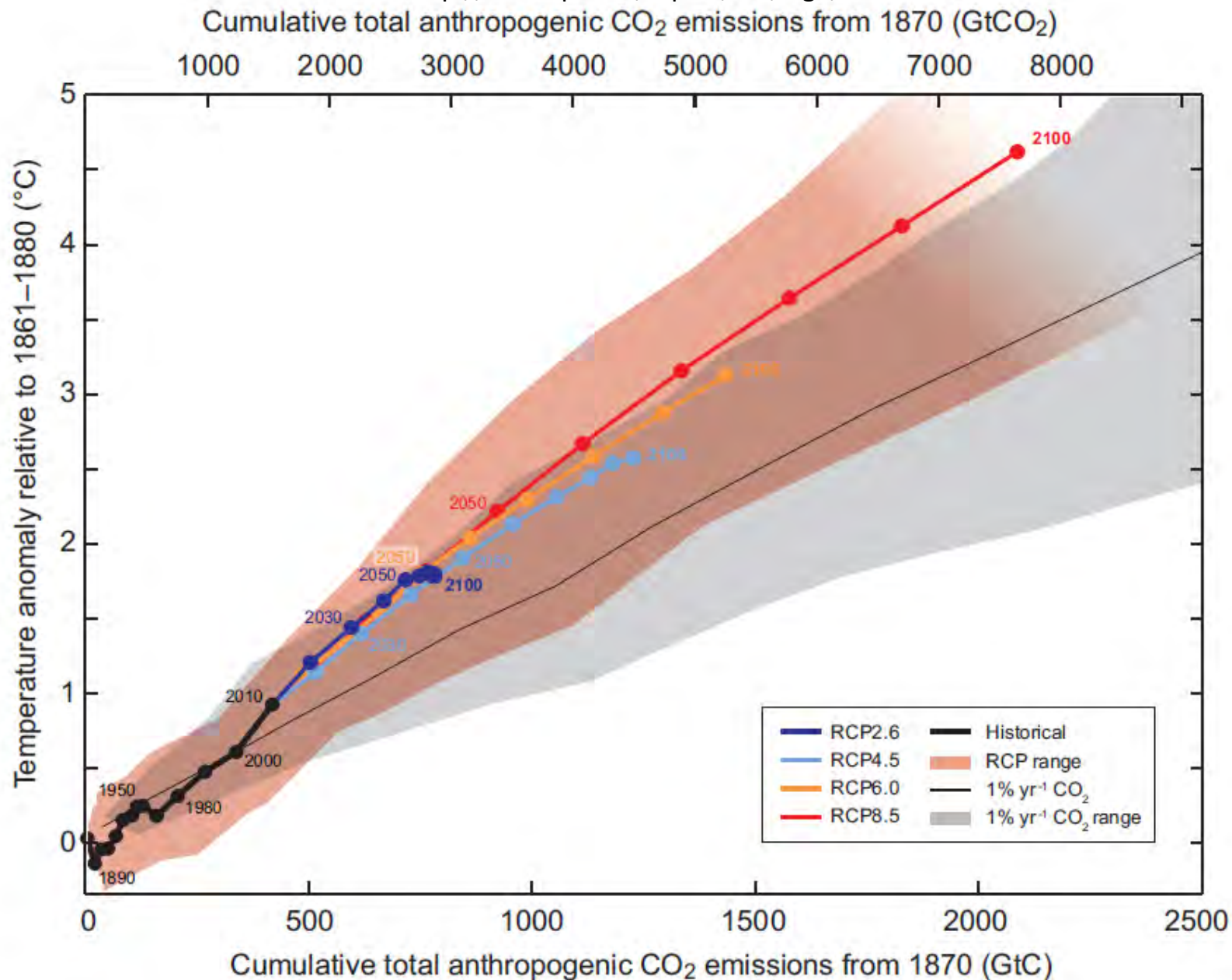
EPSRC
Pioneering research
and skills

The Climate Problem



IPCC Climate Change 2013 'The Physical Science Basis'

<http://www.ipcc.ch/report/ar5/wg1/>



The Paris Agreement

http://unfccc.int/paris_agreement/items/9485.php



UNITED NATIONS

2015

Article 4

1. In order to achieve the long-term temperature goal set out in Article 2, Parties aim to reach global peaking of greenhouse gas emissions as soon as possible, recognizing that peaking will take longer for developing country Parties, and to undertake rapid reductions thereafter in accordance with best available science, so as to achieve a balance between anthropogenic emissions by sources and removals by sinks of greenhouse gases in the second half of this century, on the basis of equity, and in the context of sustainable development and efforts to eradicate poverty.

This implies Carbon Capture and Storage on all fossil fuel use, plus minimising other anthropogenic emissions e.g. from food production.

What do we need to achieve?

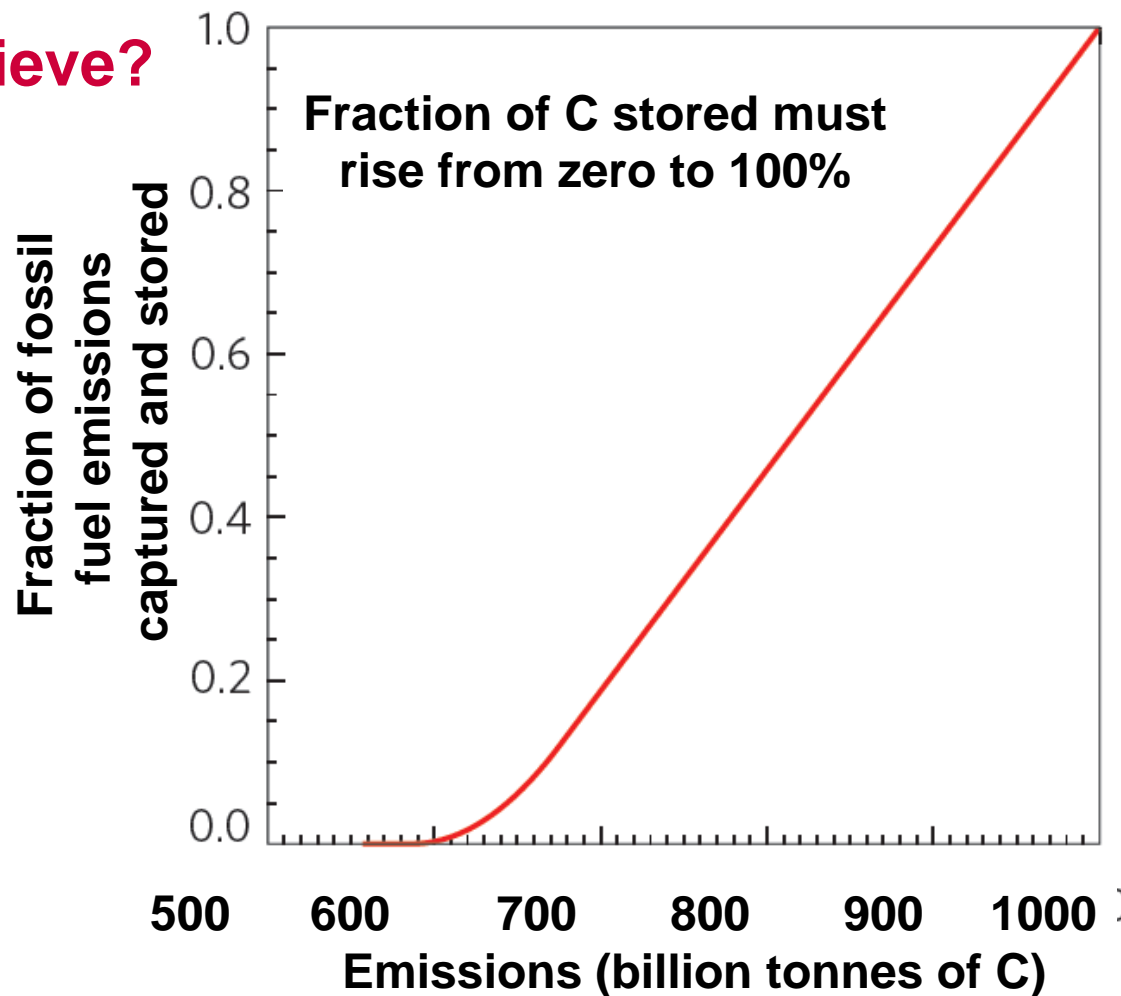
The prime climate objective is not to end the use of fossil fuels.

The prime objective is to develop and deploy 100% CCS in time to cap cumulative emissions of carbon at a safe level.

CO₂ EOR and other applications with partial overall capture should be seen as a stage in a path from zero CO₂ capture to 100% CCS.

They can be a move in the right direction from where we are now – emitting 100% of fossil carbon to atmosphere.

The key factor is the extent to which technologies and/or projects can readily be adapted to get higher fractions of CO₂ stored.



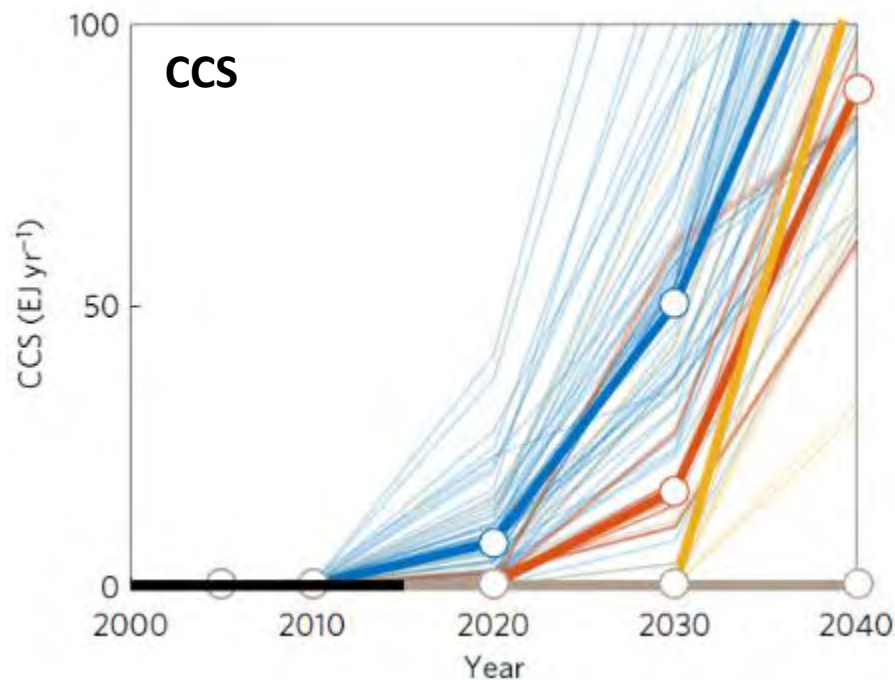
Myles R. Allen, David J. Frame & Charles F. Mason, The case for mandatory sequestration, *Nature Geoscience* 2, 813 - 814 (2009), doi:10.1038/ngeo709

Key indicators to track current progress and future ambition of the Paris Agreement

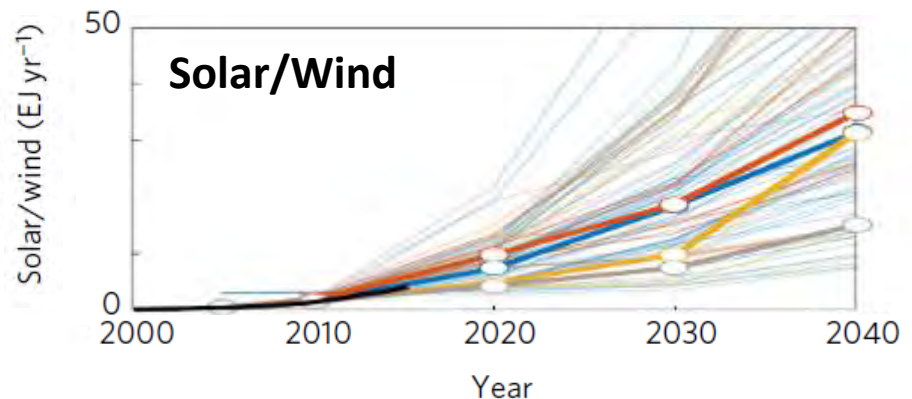


Peters, G. P. et al. , Nature Climate Change, 2017.

... without large-scale CCS deployment, most models cannot produce emission pathways consistent with the 2°C goal. **a globally coordinated effort is needed to accelerate progress**, better understand the technological risks, and address social acceptability.



Historical trends and future pathways to 2040, assuming actions start in 2010 (blue), 2020 (red), 2030 (yellow)

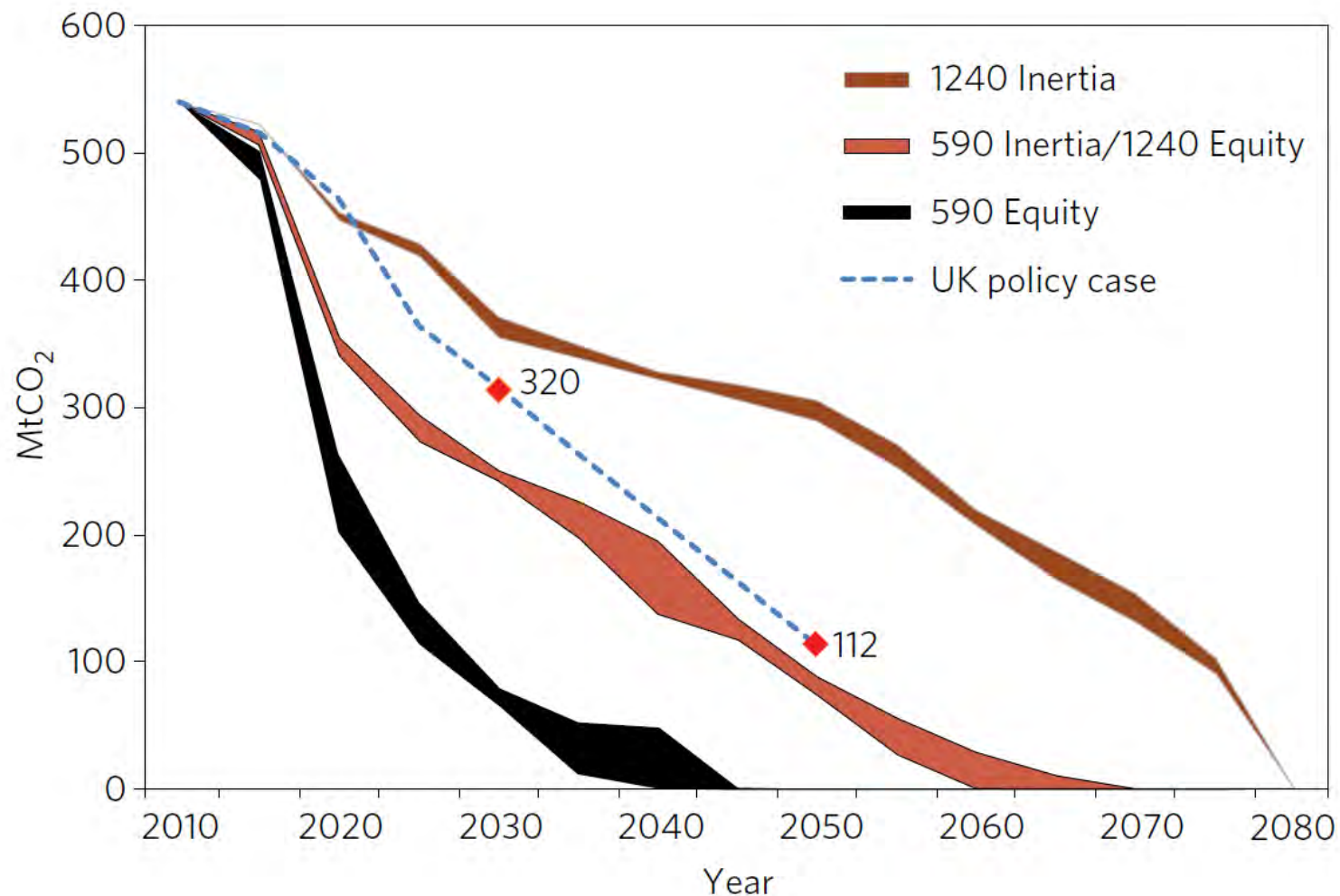


Achieving net-zero emissions through the reframing of UK national targets in the post-Paris Agreement era,

Pye et al, Nature Energy, 6 March 2017.



Total remaining global CO₂ budget for 66% chance of 2°C from the IPCC AR5 is 590 - 1240GtCO₂. UK shares by equity (per capita basis) and inertia (current total emissions basis) imply emissions trajectories.



CCS in the UK



National Importance for UK Decarbonisation and CCS



24 January 2017, Westminster Hall Debate

The Parliamentary Under-Secretary of State for Business, Energy and Industrial Strategy, Jesse Norman

CCS has a wide range of potential applications in which it could contribute to the reduction of carbon in our environment. Those include not merely decarbonising **heating** and **transport**, but providing a pathway for low-carbon **hydrogen** and producing **negative emissions** when **biomass is combined with CCS** in power generation.

It has been rightly noted that it has the potential to help **energy-intensive industries** in this country to remain competitive.

The Government absolutely believe that CCS has a potential role in long-term decarbonisation, but it must be affordable. we are taking the time to look hard at CCS to ... find a cost-effective pathway.

Committee on Climate Change

Report 'UK climate action following the Paris Agreement', October 2016.



Carbon capture and storage is very important given its potential to reduce emissions across heavy industry and the power sector, open up new decarbonisation pathways (e.g. based on hydrogen) and remove CO₂ when coupled to bioenergy. **Estimates by the Committee and by the ETI indicate that the costs of meeting the UK's 2050 target could almost double without CCS.**

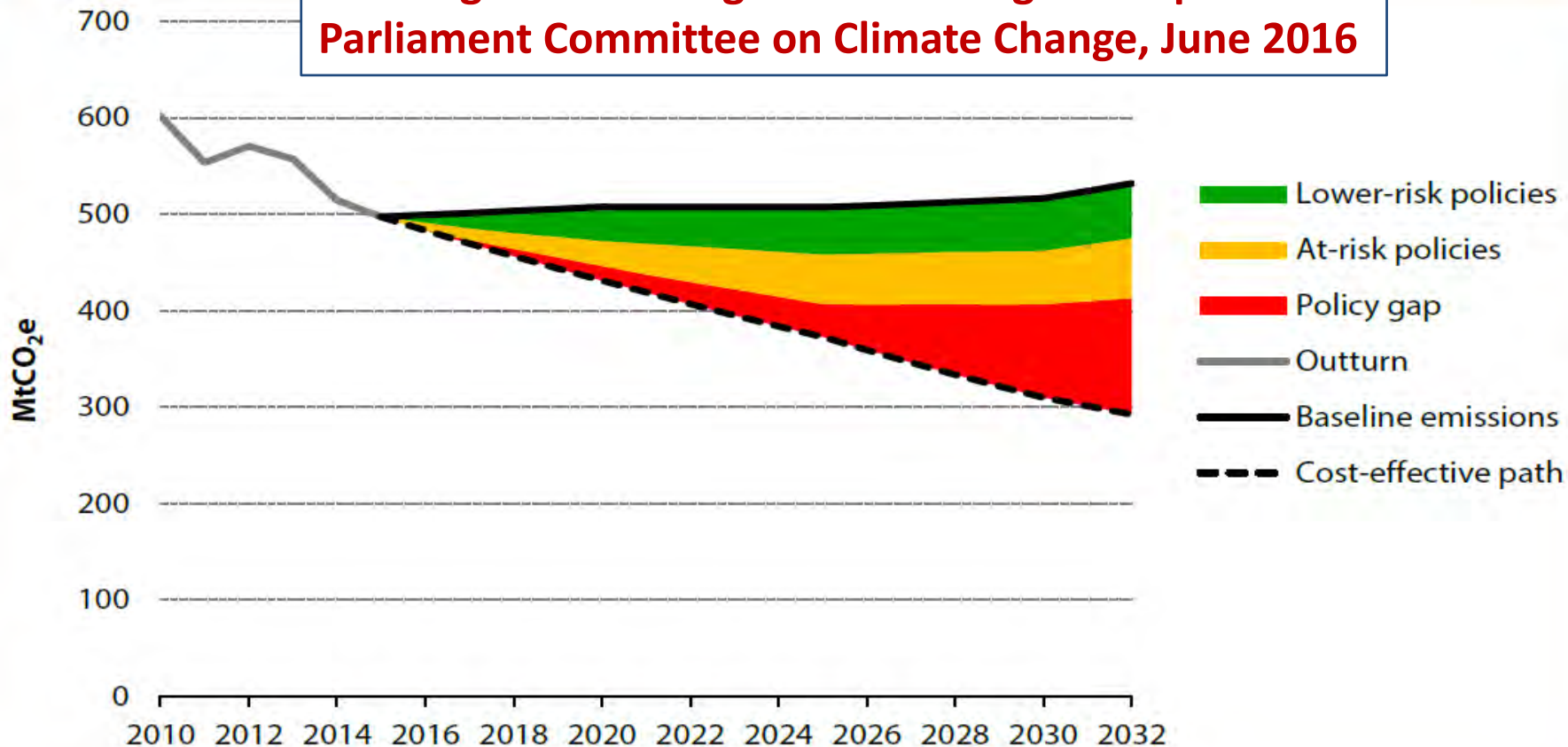
Energy Technology Institute

Report 'Carbon capture and storage: Building the UK carbon capture and storage sector by 2030', 2015

A complete failure to deploy CCS would imply close to a doubling of the annual cost of carbon abatement to the UK economy from circa 1% to 2% of GDP by 2050 (or roughly an extra £1000 on annual average household bills for energy and transport services).

Figure 2. Assessment of current policies against the cost-effective path to meet carbon budgets and the 2050 target

Meeting Carbon Budgets - 2016 Progress Report to Parliament Committee on Climate Change, June 2016



Source: DECC (2015) *Updated energy and emissions projections*; CCC analysis.

Notes: 'Lower-risk policies' (green) are those that aim to address known barriers and have sufficient funding and ambition to deliver with reasonable confidence. 'At-risk policies' (amber) either lack sufficient funding, do not address known barriers or have important design elements still to be confirmed. No funded policies exist to close the 'policy gap' (red), even though the Committee's scenarios identify abatement options to do so that are on the lowest cost path to meet the carbon budgets and the 2050 target. 'Baseline emissions' is the likely path of emissions in the absence of policy effort.

Greenhouse gas removal

- *The UK 2050 target to reduce emissions at least 80% from 1990 levels (i.e. less than around 160MtCO₂e/yr) is challenging and requires significant action across the economy, but can be met in various ways using currently known technologies.*
- *Our UK scenarios to 2050 include up to 67 MtCO₂/yr removals from three GGR options: afforestation, BECCS and wood in construction. BECCS could become capable of reducing emissions at a comparable cost to other technologies in the 2030s. This would require the Government to implement an effective new approach to CCS development and development of sustainable bioenergy supplies without locking these into alternative uses. Our scenarios include up to 47 MtCO₂/yr removed by BECCS while generating energy.*

UK CCS 2008/2009

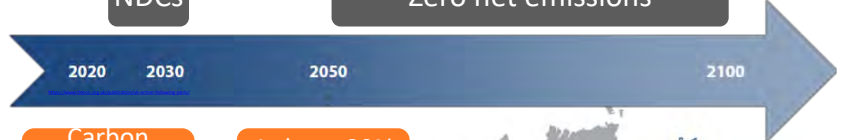


UK CCS 2016/2017



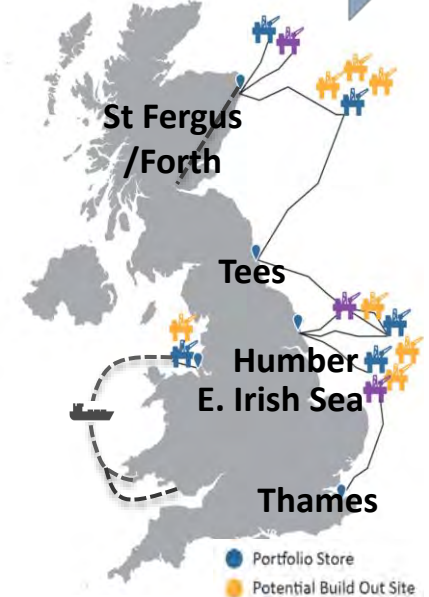
NDCs

Zero net emissions



Carbon Budgets
2 3 4 5

At least 80% below 1990



Based on <http://www.ukccs.ac.uk/engines/engines/>
Images courtesy of www.ukccs.ac.uk/engines/engines/ and other sources.



October 11, 2009

Peterhead CCS Project

Shell UK Limited and SSE

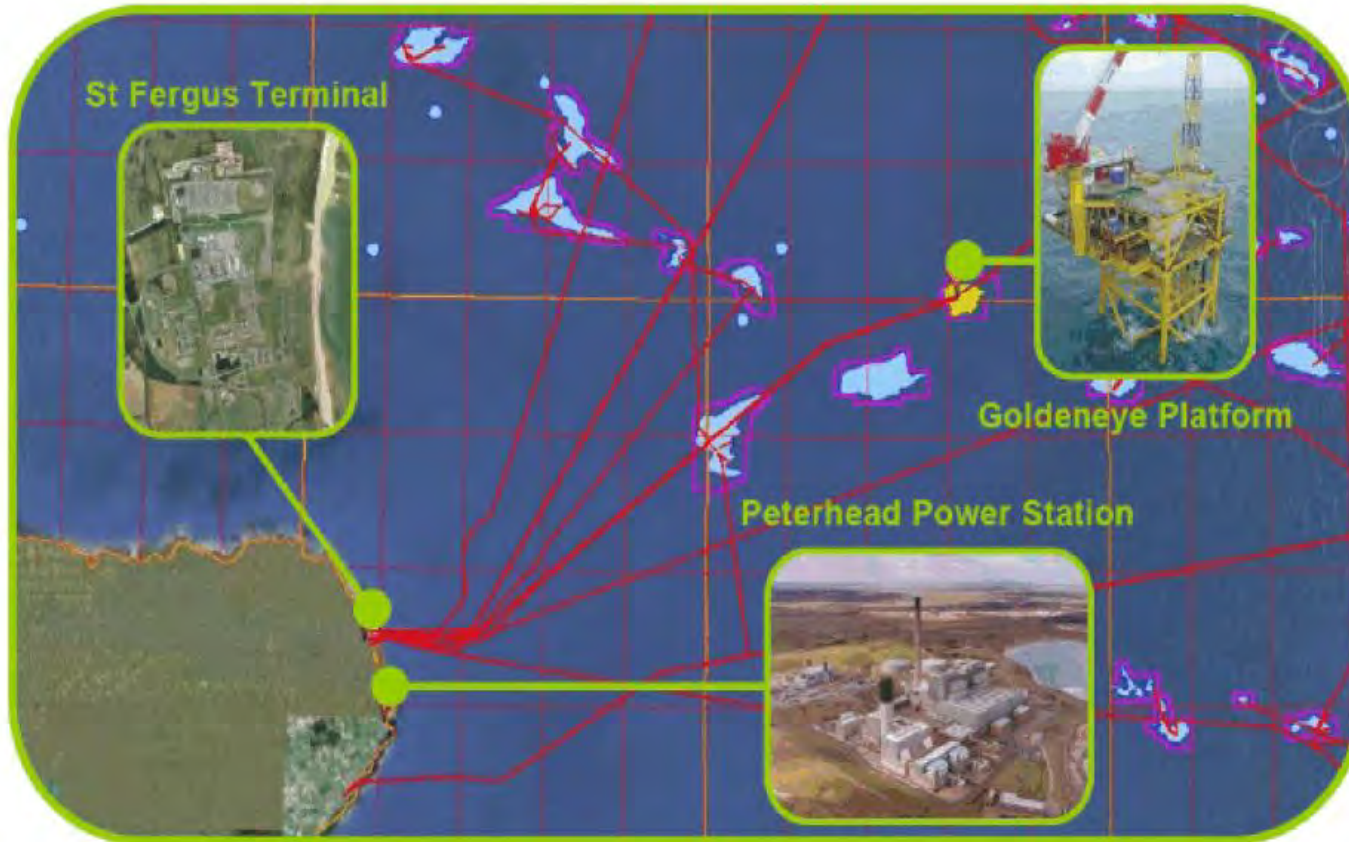
Post-combustion capture on one of three existing GT units

Approximately 400MW equivalent capacity
and 1MtCO₂/yr



Peterhead Geography

Jeremy Carey, Technology Manager, SSE, *CCS Deployment in SSE Peterhead and Beyond...*, IPA / UKCCSC CCS Conference 1st September 2011





- **New standalone power plant at the existing Drax Power Station site near Selby,**
- **State-of-the-art coal-fired power plant with the potential to co-fire biomass.**
- **426MWe (gross) oxyfuel power and carbon capture and storage**
- **90% of all CO₂ emissions captured**
- **Capturing approximately 2 million tonnes of CO₂ per year**
- **Anchor project for Yorkshire CO₂ transportation and storage network**

CCS 'demonstrations' in retrospect



The target for CCS in the UK:

- Has to achieve multiple >10 MtCO₂/yr projects for meaningful impact on national emissions
- And deploy CCS across the UK to achieve 2050 and subsequent targets

CCS demonstration programme so far:

- Has stipulated small ~ 300 MW power plant projects processing 1-2 MtCO₂/yr (inherited from coal plant approach)
- No clear plans have existed for further deployment to use T&S fully
- Unit costs for sub-scale 'demonstrations' are therefore very high
- And a solution to the main problem of building and successfully operating >10 MtCO₂/yr T&S networks with multiple inputs would not be demonstrated

Future CCS developments:

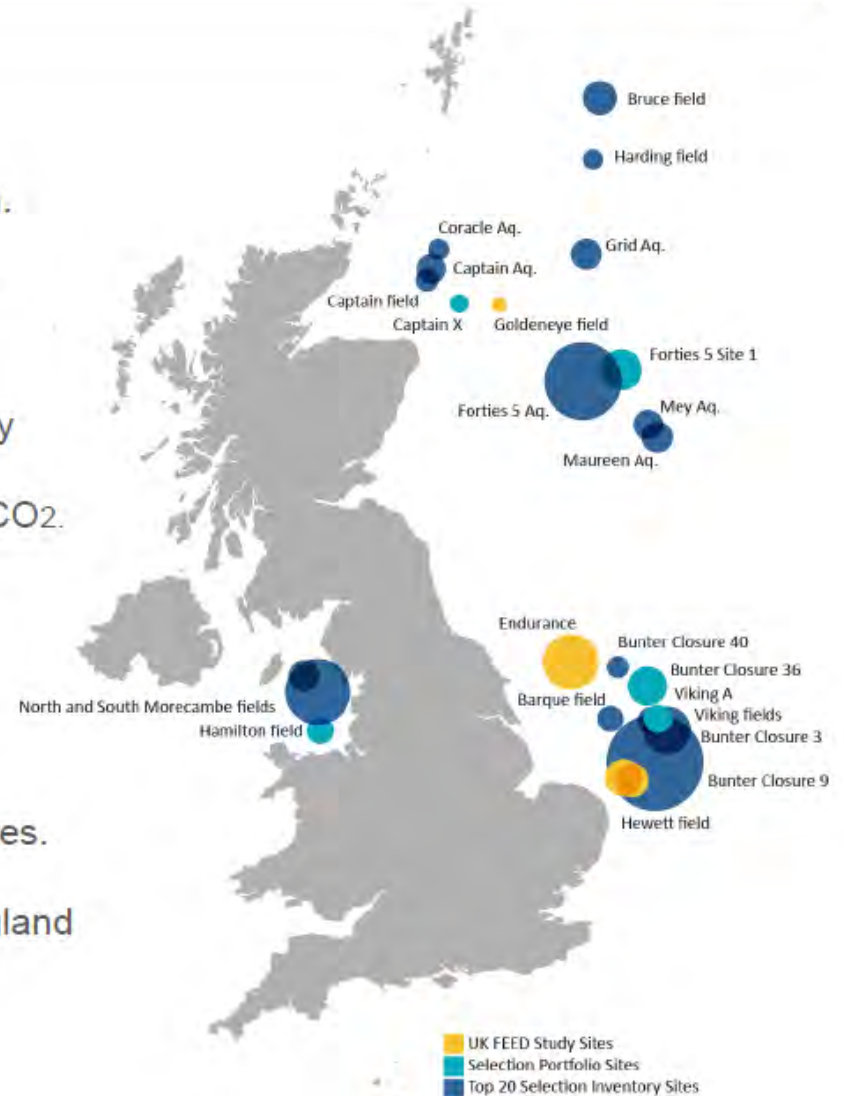
- Need scale to be cost-effective, suggested role for government in implementing T&S infrastructure (e.g Oxburgh Report*)
- National strategy for interlinked regional clusters, including shipping
- Multiple CO₂ sources: power, industry, hydrogen, BECCS
- Technology needs to be capable of net zero emissions

* <http://www.ccsassociation.org/news-and-events/reports-and-publications/parliamentary-advisory-group-on-ccs-report/>



Taking Stock

- Peterhead – project looked landable – simple chain.
- White Rose – assigning risks across several chain companies was too difficult.
- 3 CO2 stores have been appraised, plus 5 partially appraised - 8 sites totalling 1600MT - enough for many decades, at “10 GW” - 40MT/a+ CO2.
- Top risk of leakage is abandoned oil and gas wells.
- Transport and storage costs are £8-16/te – about £7/MWh for a gas fired power plant.
- Data is publically available on BEIS and ETI websites.
- Storage accessible to the South East and East England arguably the largest, and best.





Stores in UK

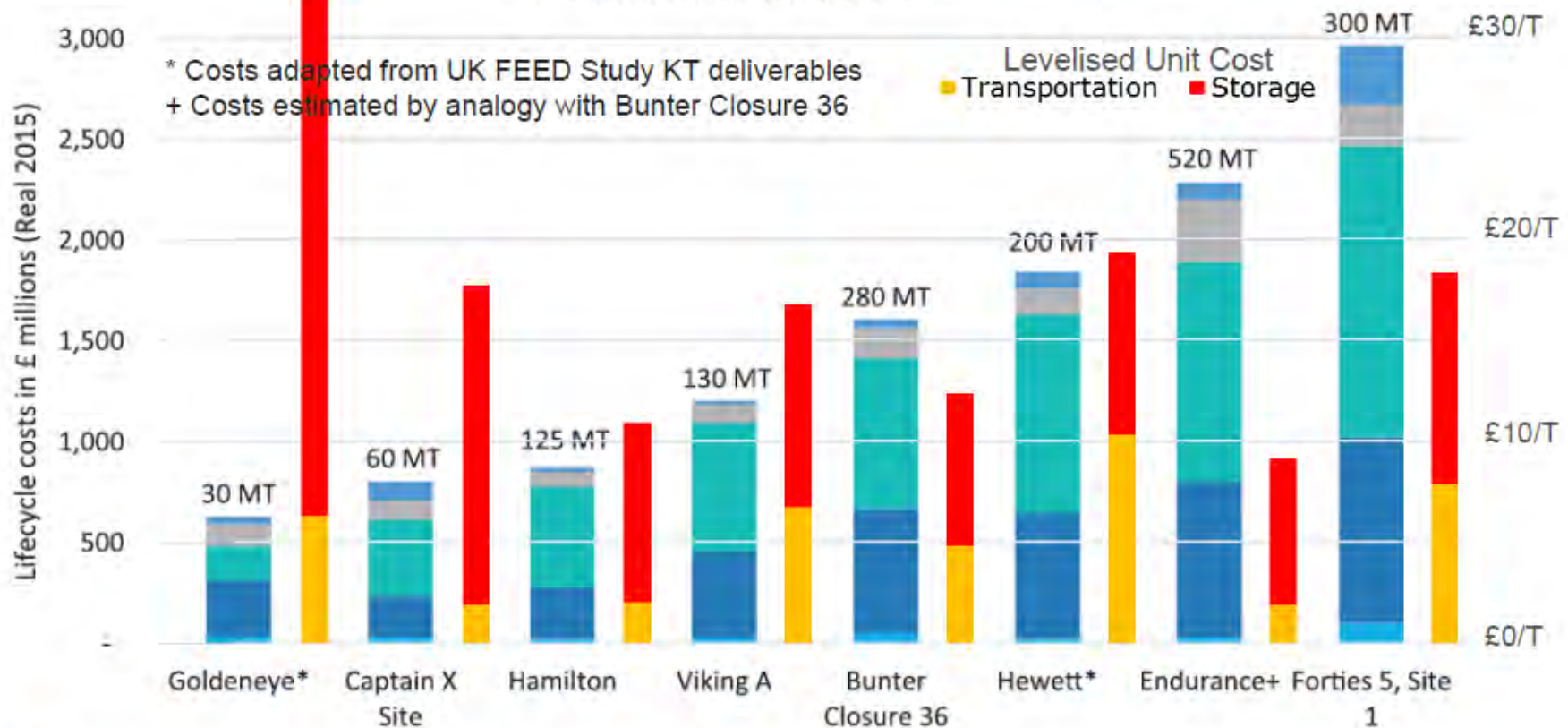
- In spite of long pipeline in some cases scale could make economics competitive (next slide)
- Depleted gas fields (decommissioning), and saline aquifers well understood due to gas industry
- SNS stores prominent in all advanced appraisal projects





UK has a wide range of offshore storage sites

CO₂ Transport and Storage Lifecycle Costs for Build Out Portfolio Sites





National Audit Office



Key findings - The role of CCS

CCS could make a significant contribution to decarbonising the economy, but there are challenges which increase the costs to deploy it in the UK. CCS has the potential to contribute to the decarbonisation of the power, industrial, transport and heating sectors. Together these make up around 83% of the UK's CO₂ emissions.

Recommendations

In developing its next phase of supporting CCS, the Department should:

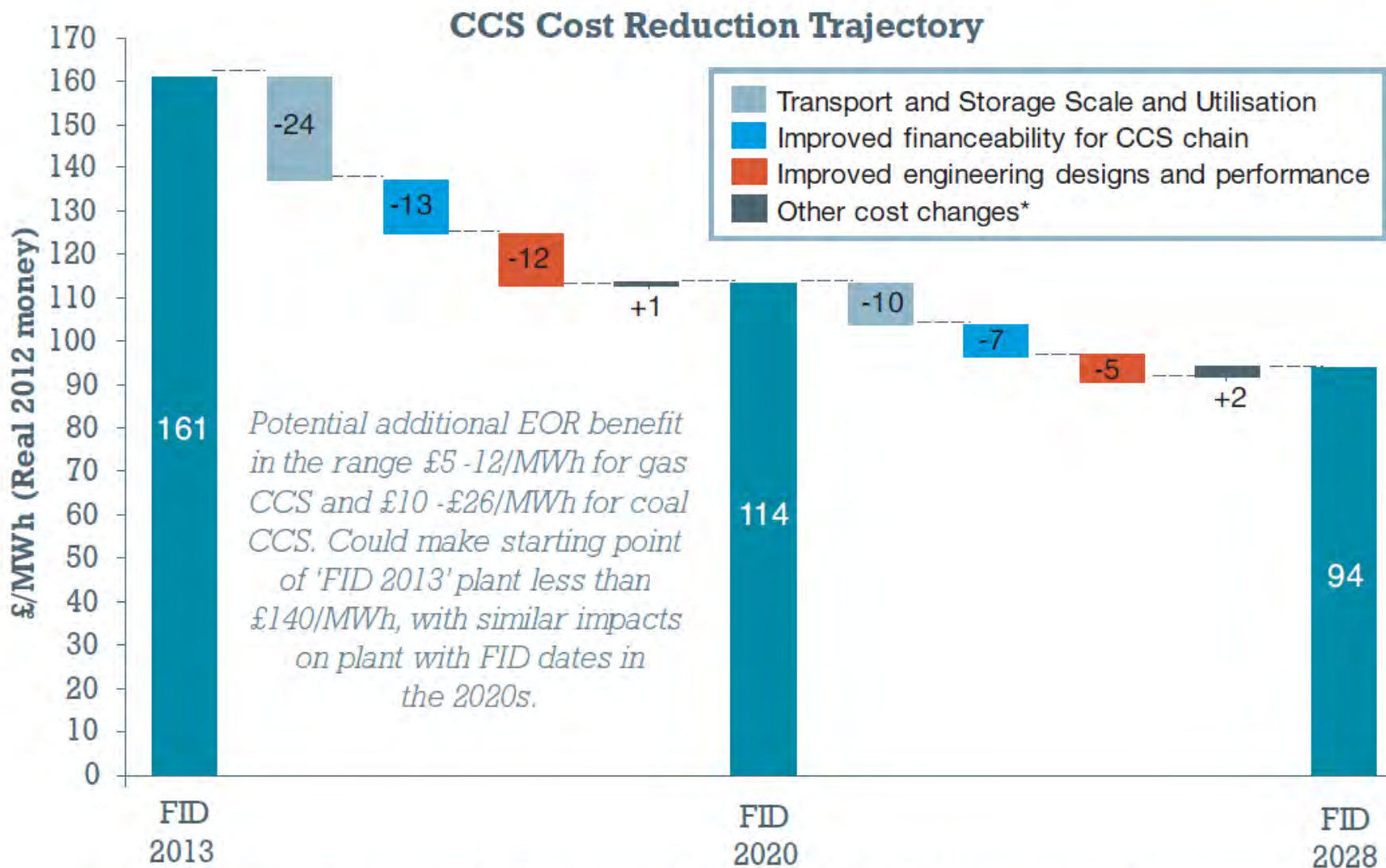
- a. Maximise the potential value from the competition by incorporating the lessons it and the key stakeholders have learned into any new CCS strategy.**
- b. Ensure it understands, from the outset, the position of CCS developers and their ability or willingness to carry certain risks and applies this in its approach.**
- c. Assess options for how it can make early projects more affordable to taxpayers and consumers.**
- d. Agree early with HM Treasury any affordability constraints.**

More generally, the Department should:

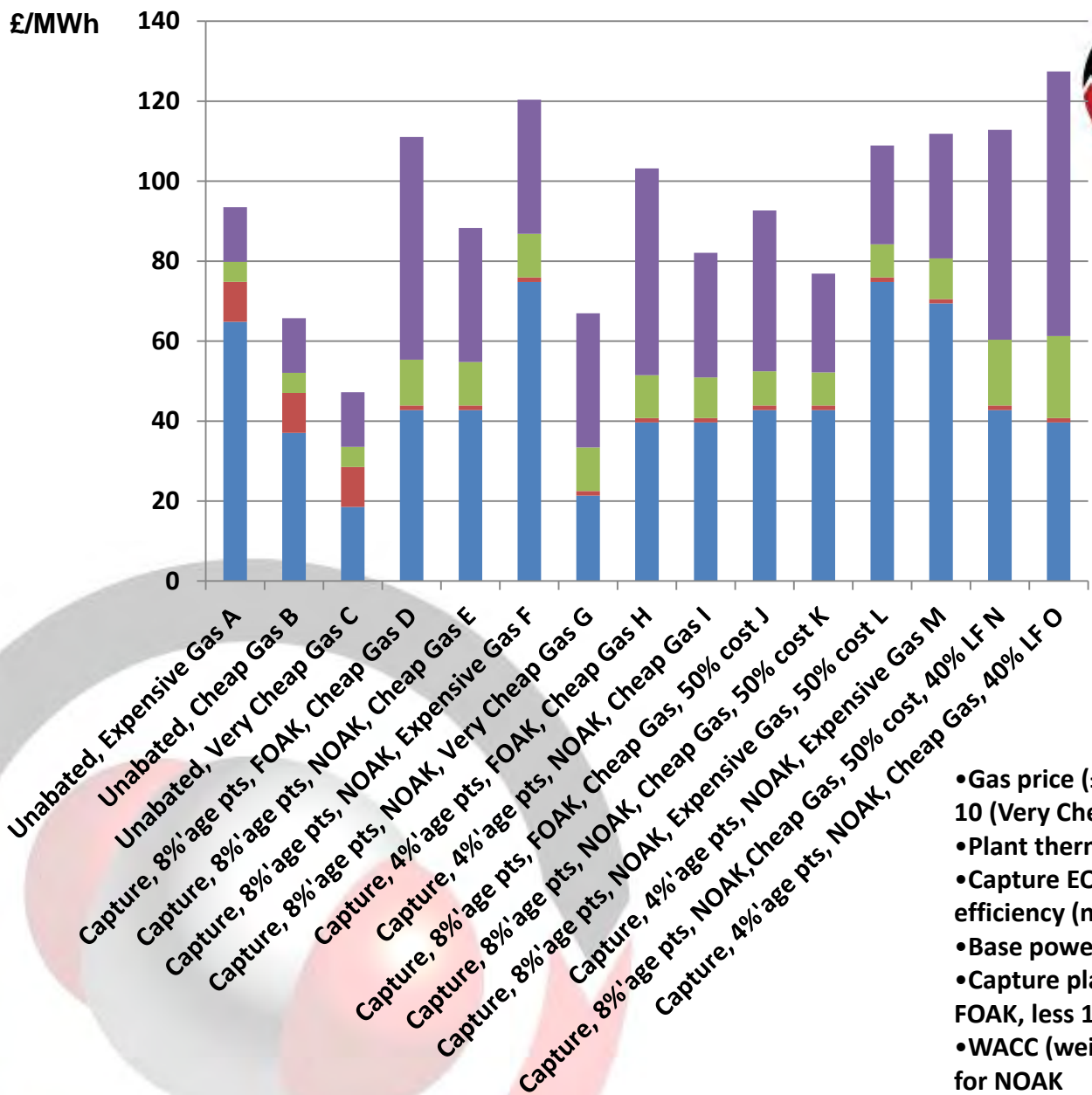
- e. Work with HM Treasury to establish and use a consistent way of measuring the value of investments in different generating technologies that enable meaningful comparisons.**
- f. Regularly revisit its commercial strategy and the value-for-money case in light of the evolving understanding of the delivery environment and market conditions.**
- g. Consider the possible consequences of, and its risk appetite for, scenarios that are outside its central forecast or expectation when it develops a new project or programme.**

CCS Cost Reduction Taskforce

Final Report, May 2013



Note: Shows average costs across technologies. *E.G. Increasing CO₂ price, falling storage abandonment costs

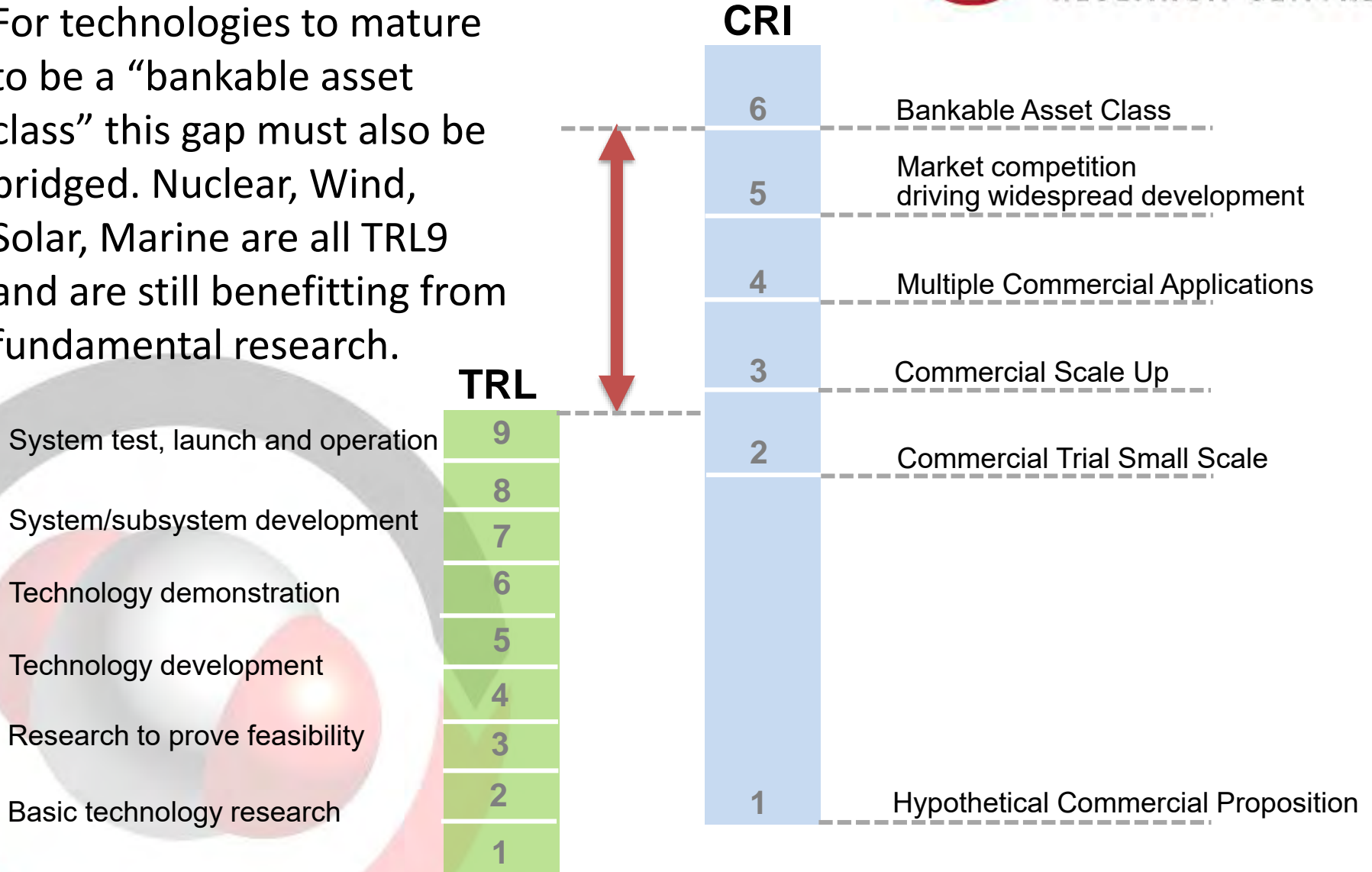


- Gas price (£/MWh, HHV basis): 35 (Expensive); 20 (Cheap); 10 (Very Cheap)
- Plant thermal efficiency without capture: 60% LHV
- Capture EOP: equivalent to 8 %'age points drop in LHV efficiency (normal); 4%'age points drop (extremely low)
- Base power plant capital cost: £1000/kWe
- Capture plant capital cost: £1250/kWe (before capture) for FOAK, less 10% for NOAK, less 50% for low cost option
- WACC (weighted average cost of capital): 15% for FOAK, 8% for NOAK
- Plant economic life: 20 years
- Operating costs: 3% of capital costs per year
- CO2 emission charges: £30/tCO2

Fundamental research needed to increase Commercial Readiness as well as TRL



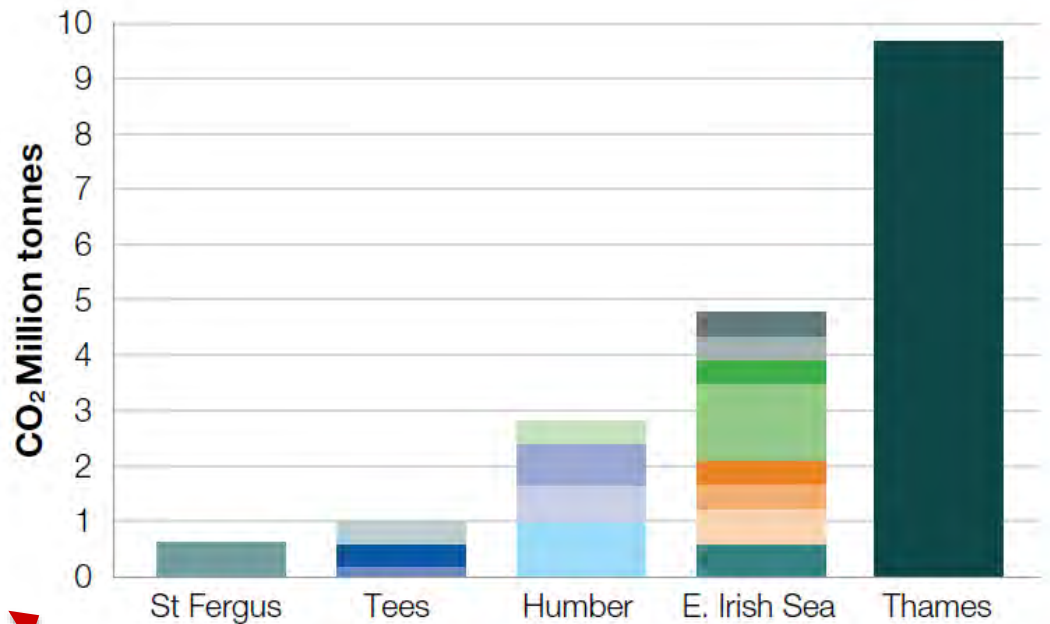
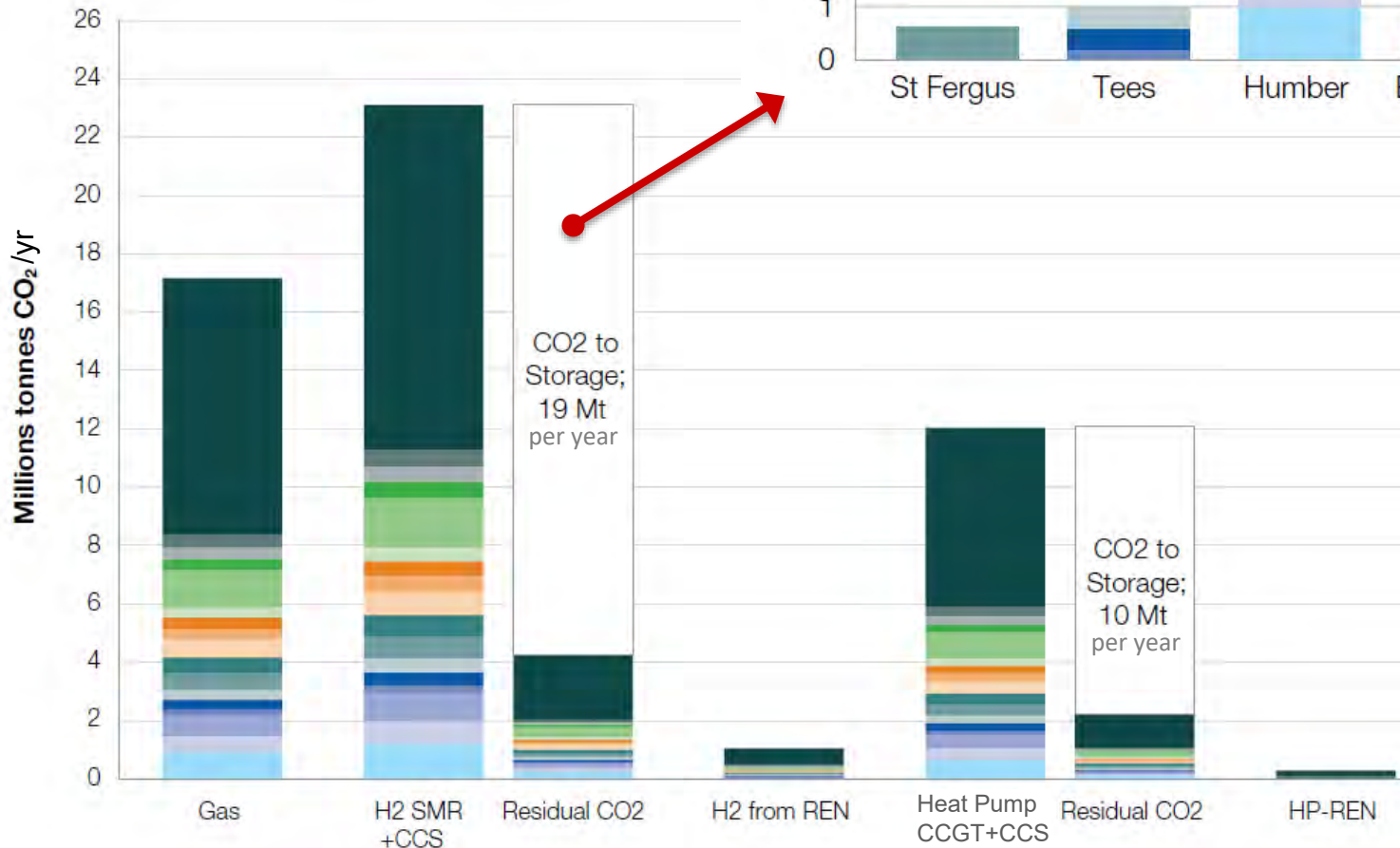
For technologies to mature to be a “bankable asset class” this gap must also be bridged. Nuclear, Wind, Solar, Marine are all TRL9 and are still benefitting from fundamental research.



Potential Role of Hydrogen in the UK Energy System



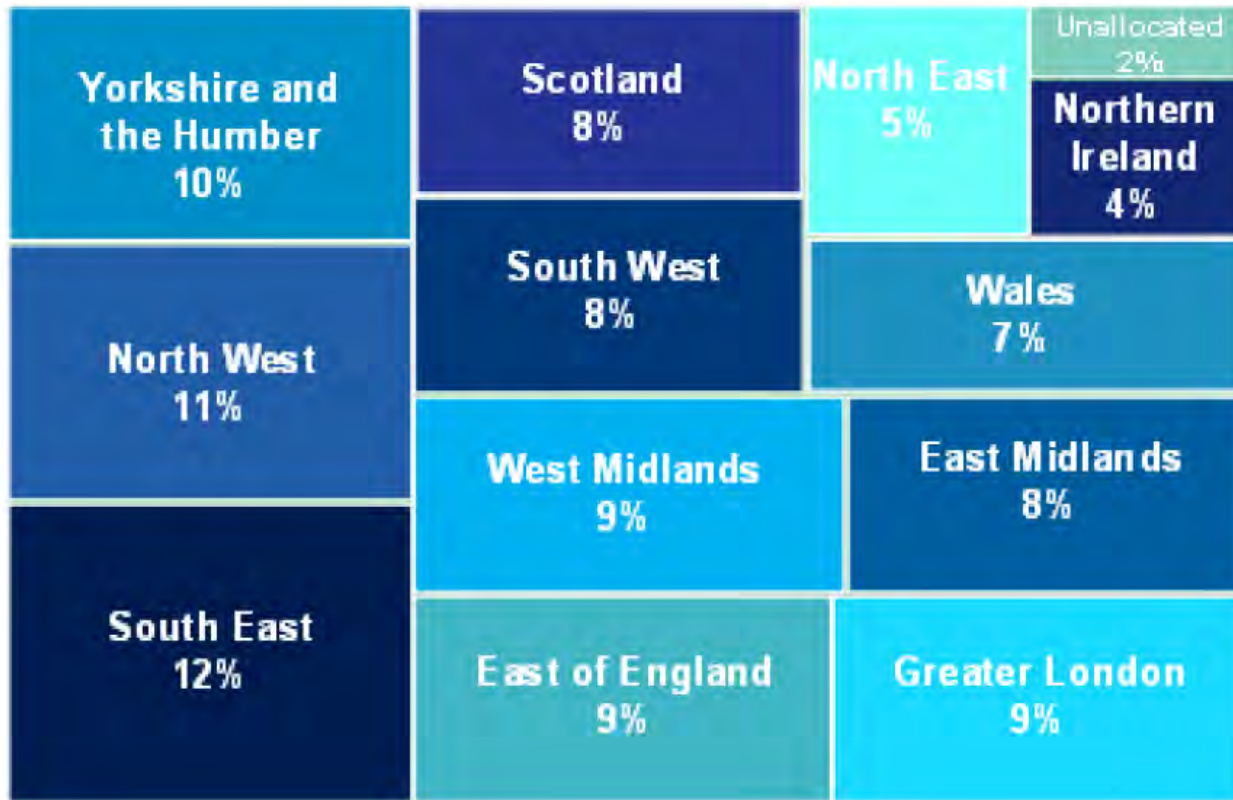
Energy Research Partnership,
 October 2016, <http://erpuke.org/wp-content/uploads/2016/10/ERP-Hydrogen-report-Oct-2016.pdf>



- CO₂ to Storage
- London
- Bristol
- Coventry
- Dudley
- Birmingham
- Nottingham
- Wigan
- Wirral
- Liverpool
- Manchester
- Edinburgh
- Sunderland
- Newcastle
- Middlesborough
- Sheffield
- Bradford
- Leeds

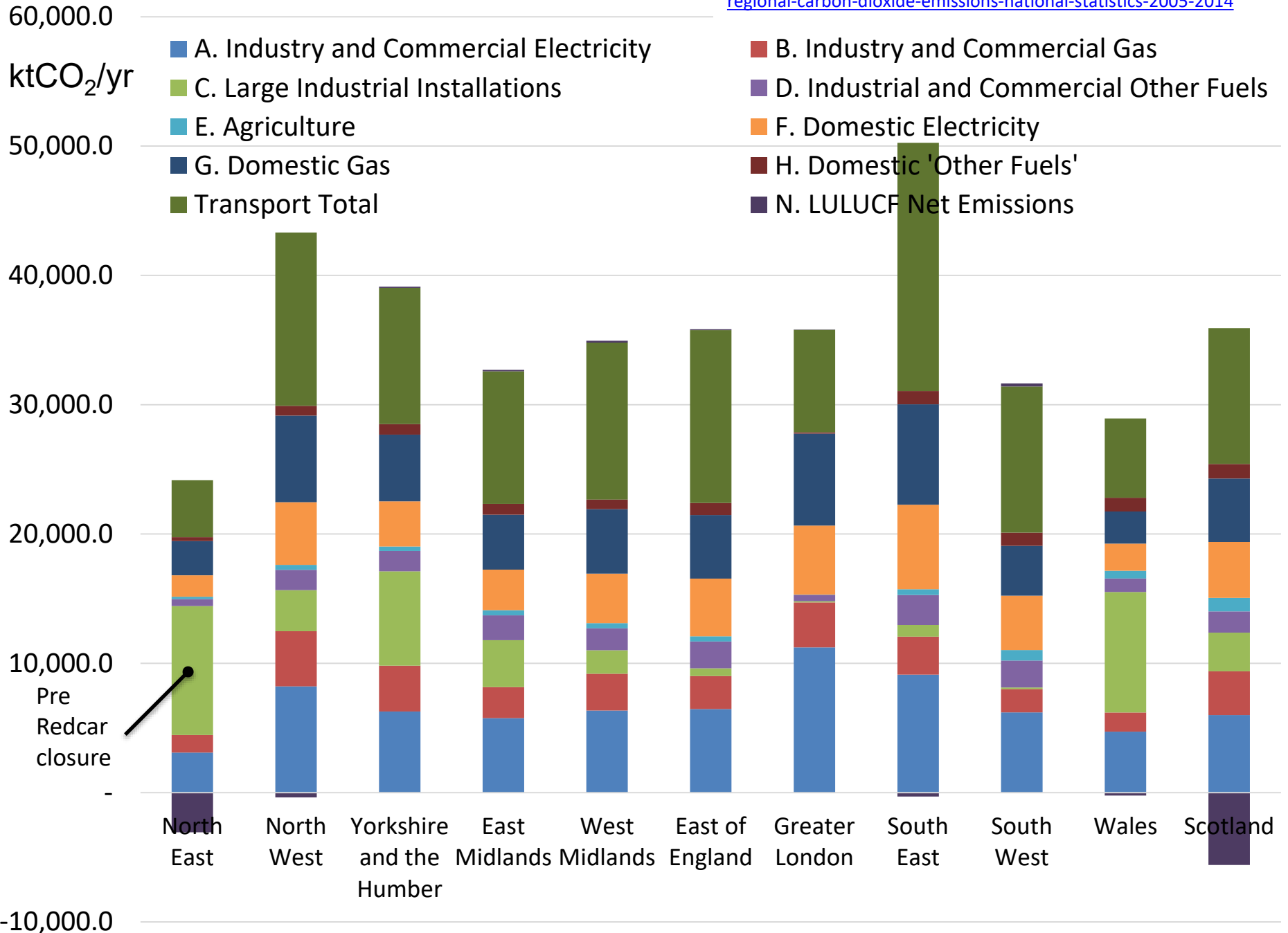
LOCAL AUTHORITY CARBON DIOXIDE EMISSIONS ESTIMATES 2014

Statistical Release: National Statistics, 30 June 2016



2014 UK CO₂ emissions by region and source

<https://www.gov.uk/government/statistics/uk-local-authority-and-regional-carbon-dioxide-emissions-national-statistics-2005-2014>



DECC & BIS – March 2015 - Industrial Decarbonisation and Energy Efficiency Roadmaps to 2050



<https://www.gov.uk/government/publications/industrial-decarbonisation-and-energy-efficiency-roadmaps-to-2050>

A series of eight reports that assess the potential for a low-carbon future across the most heat-intensive industrial sectors in the UK.

The roadmap project aimed to:

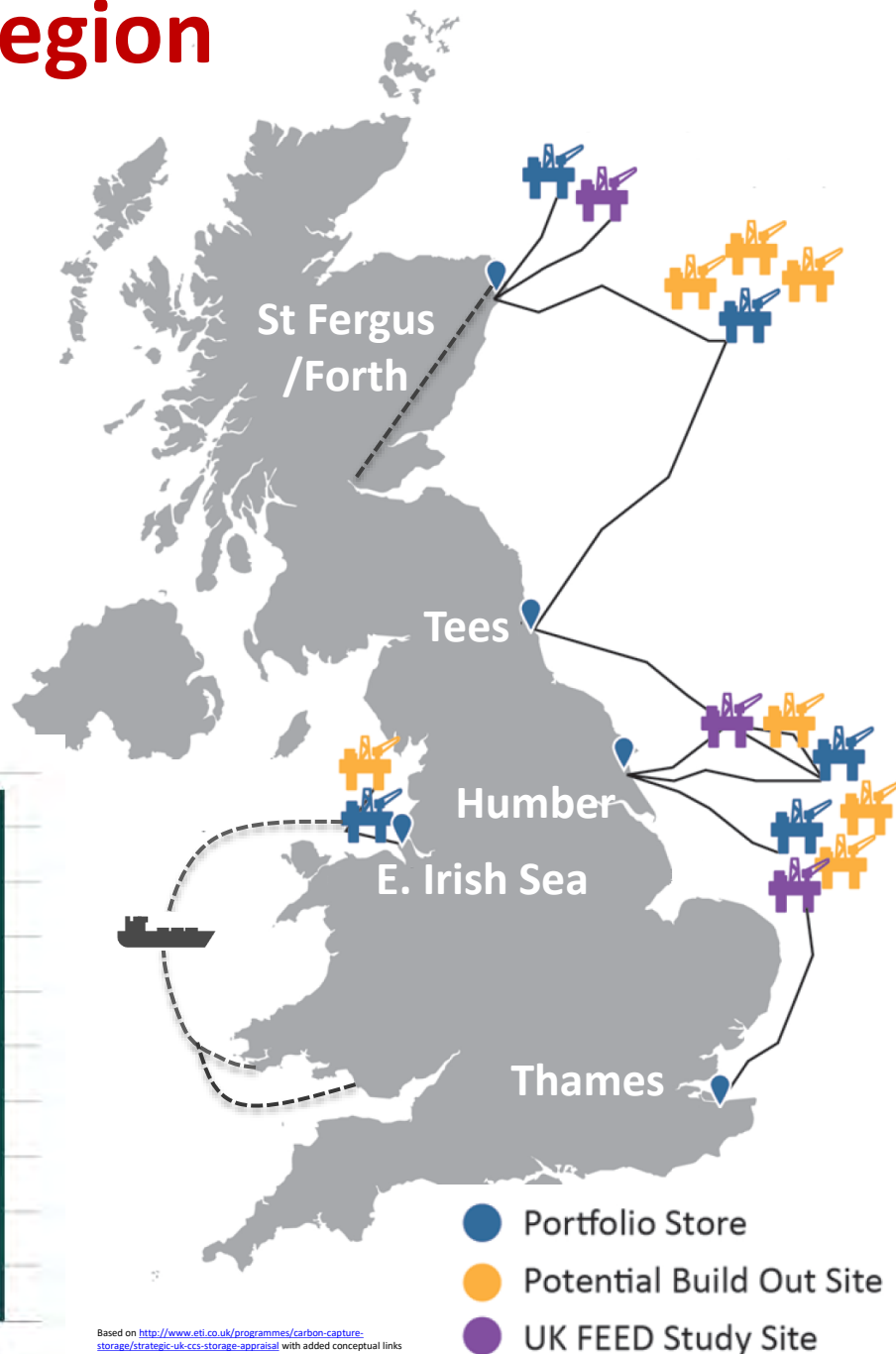
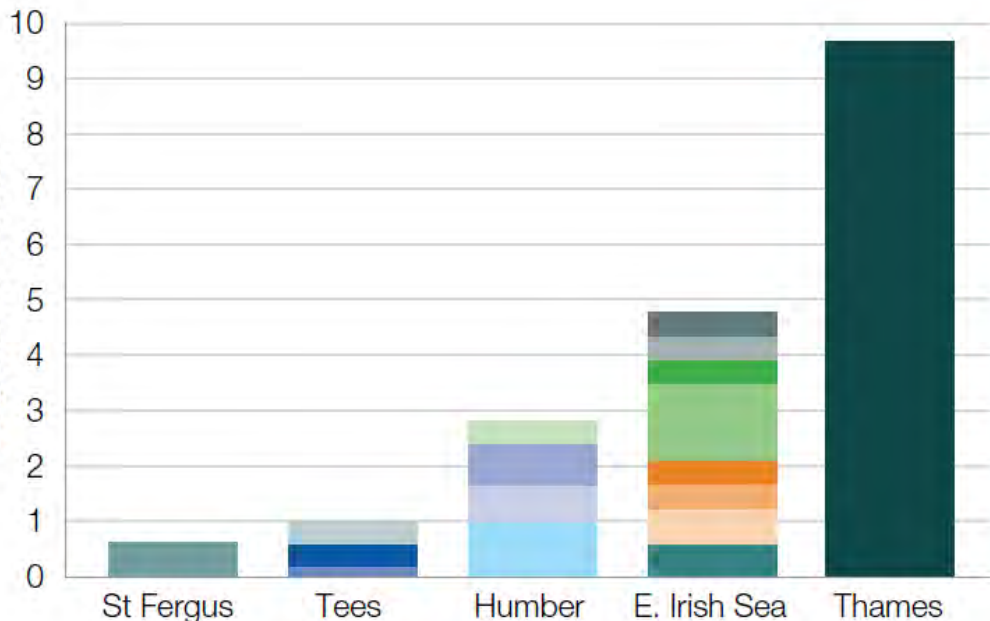
- Improve understanding of the emissions-abatement potential of individual industrial sectors, the relative costs of alternative abatement options and the related business environment including investment decisions, barriers and issues of competitiveness;
- Establish a shared evidence base to inform future policy, and identify strategic conclusions and potential next steps to help deliver cost-effective decarbonisation in the medium to long term (over the period from 2020 to 2050).

Significant direct CCS in four sectors by 2050 less than 20 MtCO₂/yr:
Chemicals (6), Iron & Steel (10 – but predates Redcar closure), Cement (2.5), Oil Refining (2.5).

Indirect CCS through decarbonised electricity and hydrogen in all sectors.

CO₂ from hydrogen by region

- CO2 to Storage
- London
- Bristol
- Coventry
- Dudley
- Birmingham
- Nottingham
- Wigan
- Wirral
- Liverpool
- Manchester
- Edinburgh
- Sunderland
- Newcastle
- Middlesborough
- Sheffield
- Bradford
- Leeds

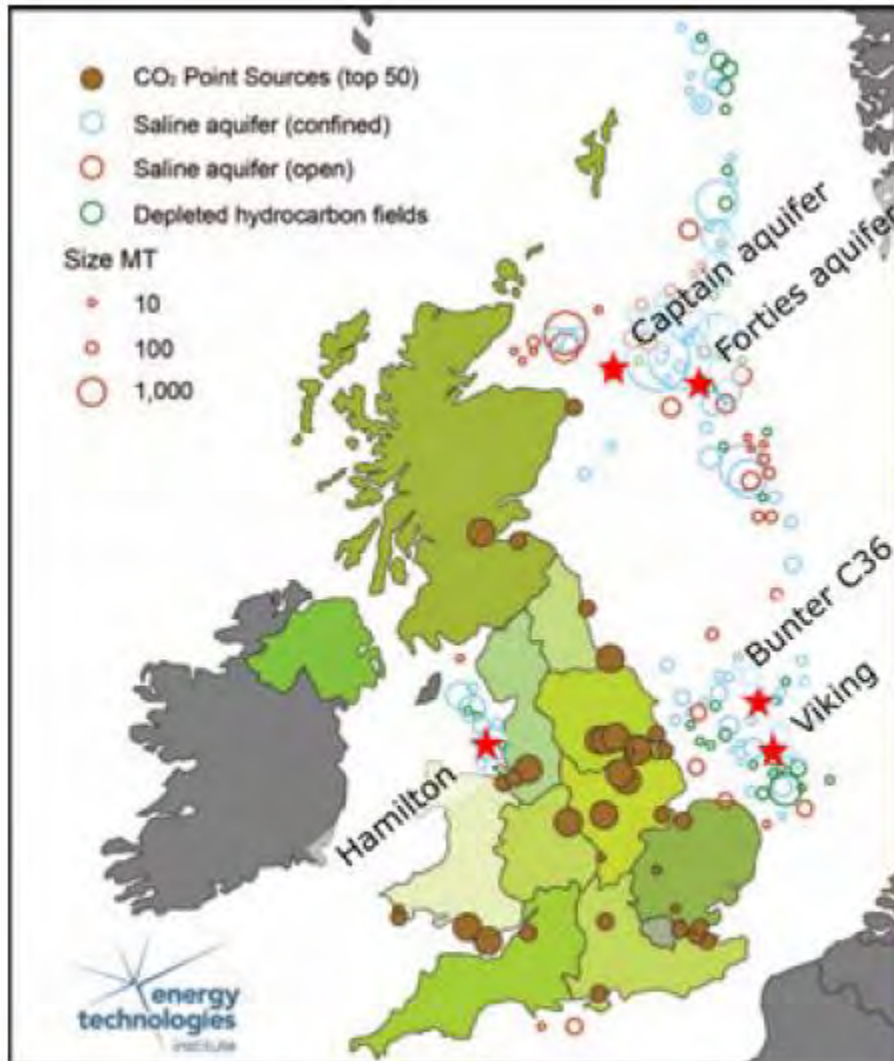


Based on <http://www.eti.co.uk/programmes/carbon-capture-storage/strategic-uk-ccs-storage-appraisal> with added conceptual links shown dotted.

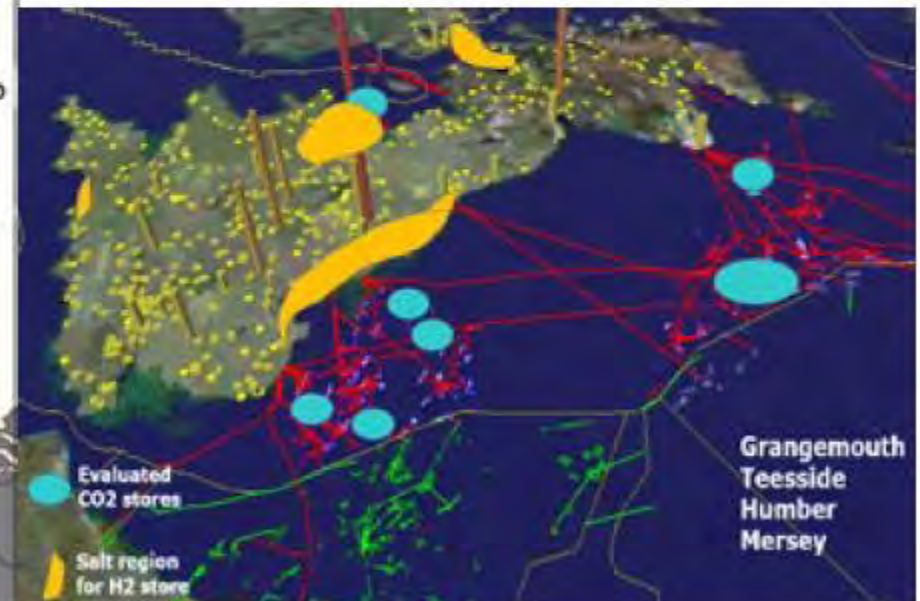
- Portfolio Store
- Potential Build Out Site
- UK FEED Study Site

H21 Leeds City Gate System

<http://www.northerngasnetworks.co.uk/document/h21-leeds-city-gate/>



Potential hydrogen storage sites in salt formations (yellow) are another geological asset for the UK.



Type C Concepts: World's Largest Bilobe-Liquid Gas Storage Tanks

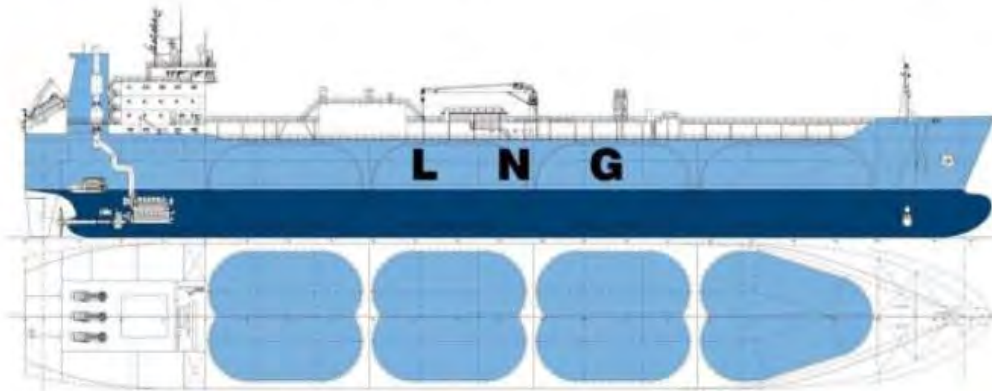


From: Gas Carriers: Arrangements & Characteristics, Rich Delpizzo, Manager, Global Gas Solutions, Presentation to Marine Chemists, Las Vegas, NV, July 2014.

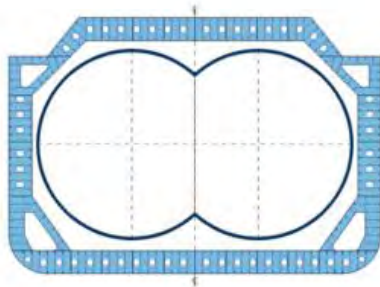
9,686 m³ bilobe Type C LNG tanks building at Sinopacific for Denmark's Evergas

Independent Tanks: Type C – Bilobe

- Bilobe tanks being considered for 20-30,000 m³ size ships



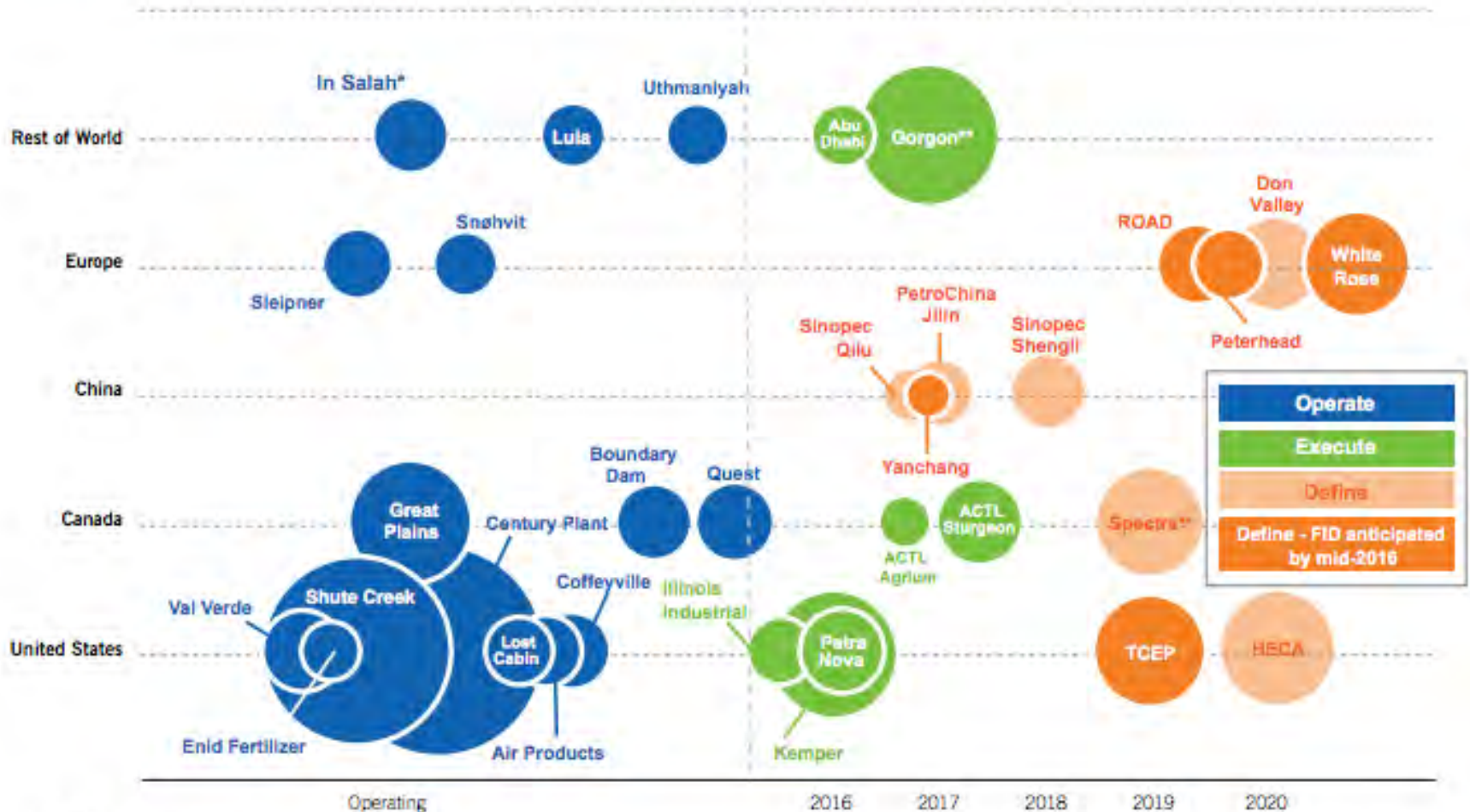
From: Gas Carriers: Arrangements & Characteristics, Rich Delpizzo, Manager, Global Gas Solutions, Presentation to Marine Chemists, Las Vegas, NV, July 2014.



GLOBAL ACTIVITY



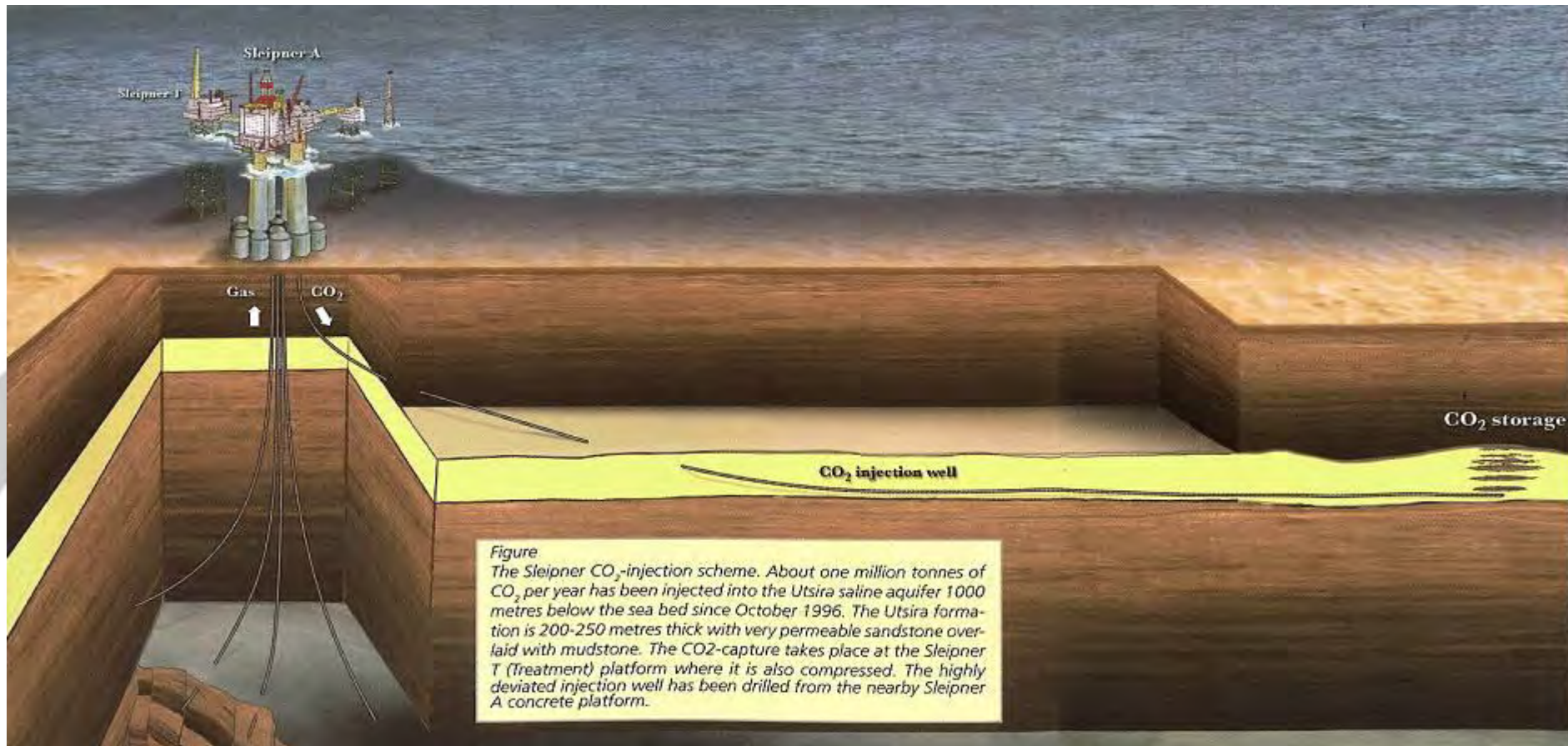
Figure 4 Actual and expected operation dates for large-scale CCS projects in the Operate, Execute and Define stages by region and project lifecycle stage
View in 2015

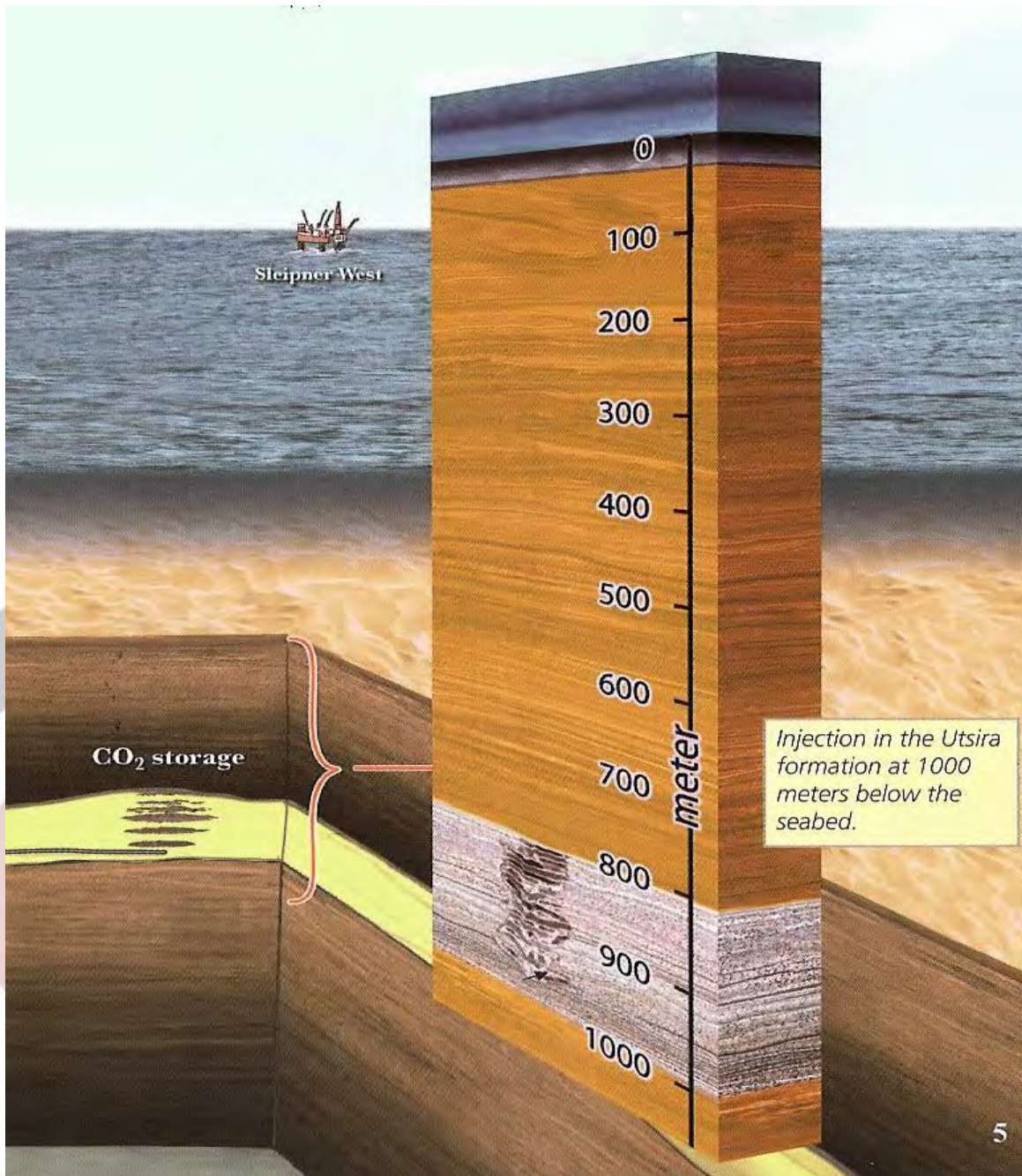


○ = 1Mtpa of CO₂ (area of circles proportional to capacity)

* Injection currently suspended
** Institute estimate of start date

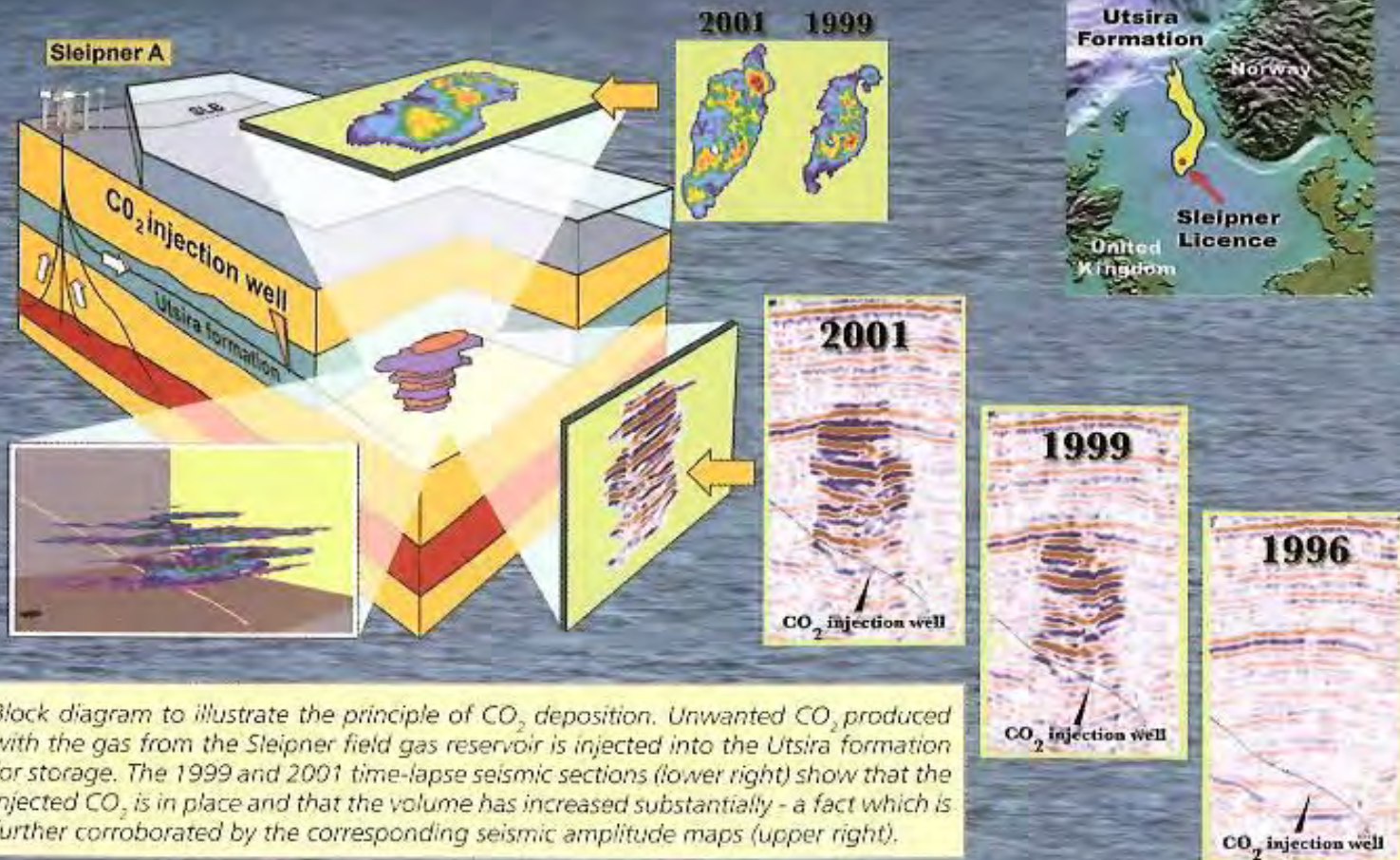
Sleipner, aquifer storage for 1Mt/yr CO₂ separated from natural gas







Time lapse (4D) seismic tracking of injected CO₂





SaskPower, Saskatchewan, Canada: Old power plant being rebuilt with a state-of-the-art turbine and a fully-integrated carbon capture system capable of cutting CO₂ emissions by up to 90%, or approximately one million tonnes a year.

<http://www.saskpower.com>

Petra Nova is a joint venture between NRG Energy and JX Nippon Oil & Gas Exploration that became operational in early January 2017

<http://www.ourworldofenergy.com/vignettes.php?type=coal-power&id=11>



The largest post-combustion CCS project installed on an existing coal-fired power plant in the world. The project is designed to capture approximately 90 percent, or 1.6 million tons annually, of the CO₂ from NRG Energy's WA Parish 240 MW generating station southwest of Houston, Texas. T



AL REYADAH, ABU DHABI

Direct iron reduction plant CO₂ is transferred at low pressure to the CCF where it is dehydrated (to less than 20lb/MMscf), compressed to 235barg (via an Integrally Geared LP Compression followed by Reciprocating HP Compression), metered and exported to the CO₂ Pipeline. The CCF design capacity is 0.8 million tonnes per annum.

<https://www.globalccsinstitute.com/projects/abu-dhabi-ccs-project-phase-1-being-emirates-steel-industries-esi-ccs-project>



UKCCSRC 2017-2022



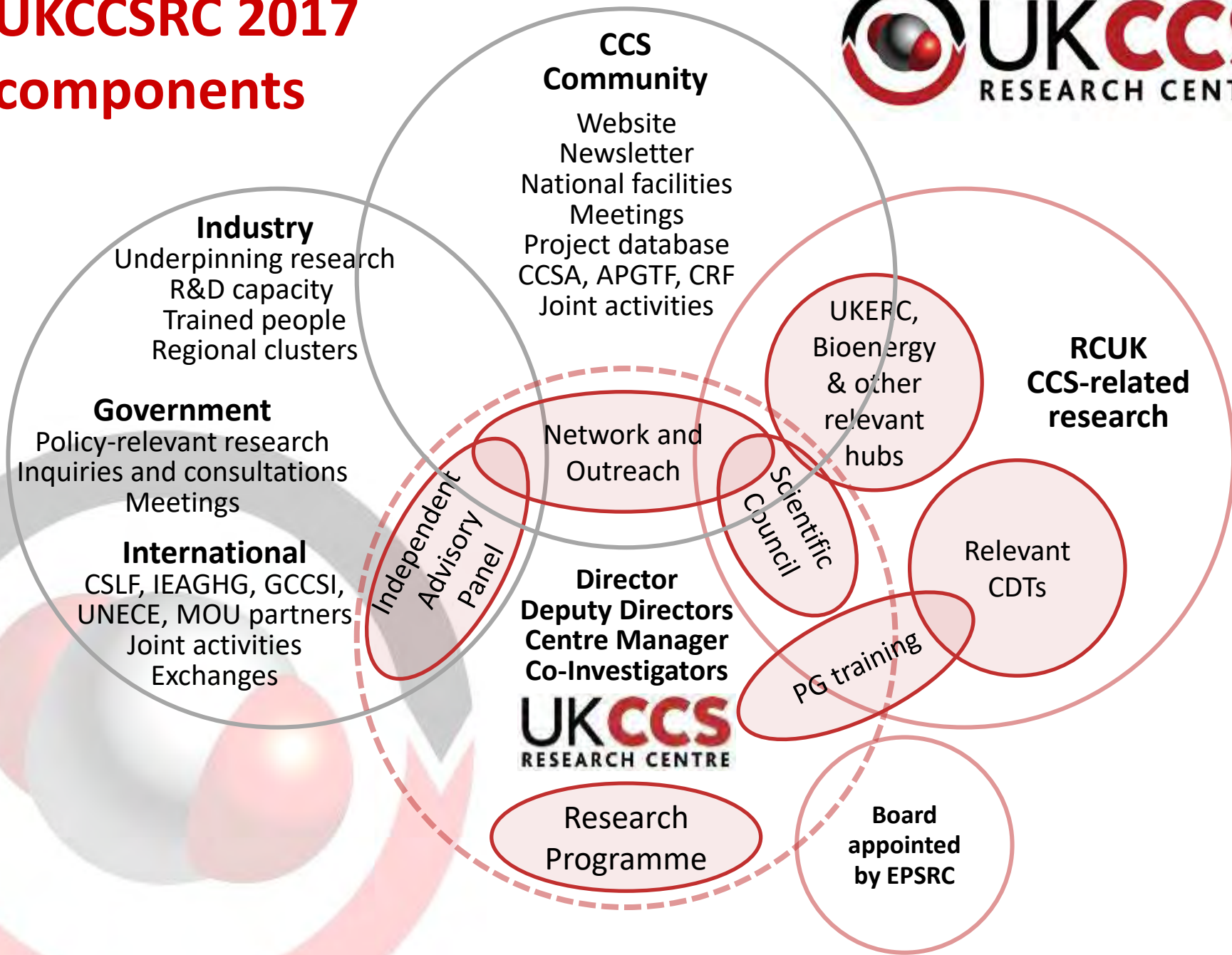
UKCCSRC 2017 Strategic Mission



Help ensure that CCS will play an effective role in reducing net CO₂ emissions while securing affordable and controllable electricity supplies, low carbon heat and competitive industries for the UK.

- **Lower costs and integration:** cost reductions for energy systems, industry and the wider economy.
- **Benefits of CCS in energy and economic systems:** inform policy and planning by government and by research funders, industry and other stakeholders.
- **Capacity to support delivery:** maintain an effective UK CCS community to deliver societal benefits to 2050 and beyond.
- **Cohesion, strategy, coordination, collaboration:** be a focal point for setting strategies, coordinating research and collaboration, nationally and globally.
- **Be an indispensable knowledge partner** in the UK and globally.

UKCCSRC 2017 components



Research challenges in CCS



Part 1 - Have built up and be able to maintain the necessary research capacity

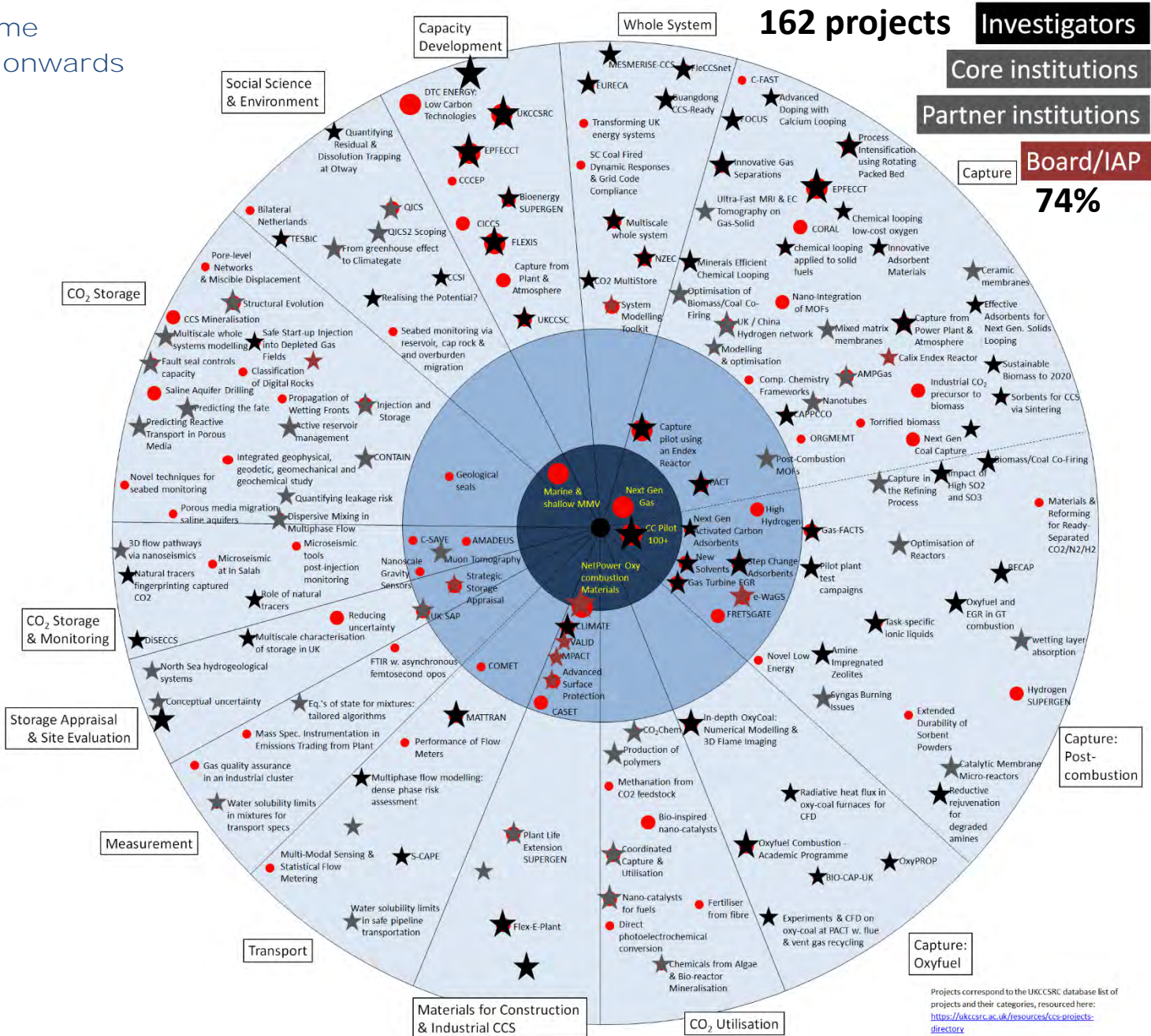
- Responsive and sustained strategy from funders
- Broad and deep research community
- Advanced facilities
- Established cooperation with UK industry and other stakeholders
- Links to key international partners for collaboration and delivery

UK CCS R&D Programme
£253M, running 2011 onwards



- Project with budget of <£1m
- Project with budget of £1m - £5m
- Project with budget of >£5m

FUNDAMENTAL RESEARCH & UNDERSTANDING
COMPONENT DEVELOPMENT & APPLIED RESEARCH
PILOT SCALE



Projects correspond to the UKCCSRC database list of projects and their categories, resourced here: <https://ukccsrc.ac.uk/resources/ccs-projects-directory>

UKCCSRC 2017 Board



Members appointed by EPSRC, from CCS stakeholder organisations, acting in an individual capacity.

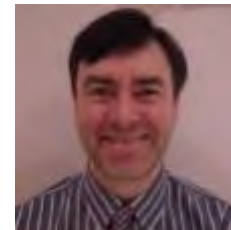
- Agrees and monitors responsive strategy metrics and delivery
- Independent oversight for flexible funding and other expenditure



Jeremy Carey
(Chair)



James Watt



Tony Alderson



Matthew Davidson



Owain Tucker



Johan Einer Hustad



Ex-officio Members



Celia Yeung



Will Lochhead



Matthew Billson



UKCCSRC 2017 Partners for Collaboration and Impact



UK



UK CLUSTERS
ukccsrc.ac.uk/about/delivering-cost-effective-ccs-2020s-new-start



GGR PROGRAMME
 GHG removal from atmosphere



CDT PROGRAMME
 CCS and Cleaner Fossil Energy



International



Partners in key CCS countries

Norway

China

Netherlands

Canada

Australia



UKCCSRC Independent Advisory Panel 2017



23 members, acting in an individual capacity, from
key industries and other CCS stakeholder organisations



Greenway



TOTAL



Yoenergy



About UKCCSRC PACT



- **UKCCSRC Pilot-scale Advanced Capture Technology facilities**
 - Funded by: DECC and EPSRC
 - Cranfield, Edinburgh, Imperial, Leeds, Nottingham, Sheffield
 - Member of International CCS Test Centre Network (for UK)
- **Scope:** Specialist national facilities for research in advanced fossil-fuel energy, bioenergy and carbon capture technologies
 - Comprehensive range of pilot-scale facilities
 - Supporting specialist research and analytical facilities
 - Leading academic expertise
- **Aim:** Support and catalyse industrial and academic R&D to accelerate the development and commercialisation of novel low carbon technologies
- **Objectives**
 - Bridge gap between bench-scale R&D and industrial pilot trials
 - Provide shared access to industry and academia



Department
of Energy &
Climate Change

EPSRC

Engineering and Physical Sciences
Research Council



UKCCSRC PACT Locations



UKCCSRC PACT Office

- Admin & Business Centre of UKCCSRC PACT
- Business and stakeholder engagement
- Office for users accessing facility
- Computer modelling facilities
- CPD & training

PACT Edinburgh Facilities

Advanced Capture Technology Transport
Remotely-Operated Mini-Lab (ACTTROM)



PACT Core Facilities

- 1 tCO₂/day Solvent-Based Capture Plant
- 250kW Air-fired Coal/Biomass Rig
- 250kW Oxyfuel Coal/Biomass Rig
- 330kW Gas CHP Turbines
- Gas Mixing Facility (synthetic flue/process gas)
- Online Monitoring,
- Analytical & Lab Facilities



PACT Nottingham Facilities

- Analytical Facility in CCS and Unconventional Gas
- GC-MS, LC-MS & IC for capture solvent analysis
- Thermal analysis: DSC, TGA, TG-MS, HP TGA
- Solid state NMR
- Optical microscopy
- Modular 800C, 100bar flow reactor
- Milling equipment with powders physical analysis

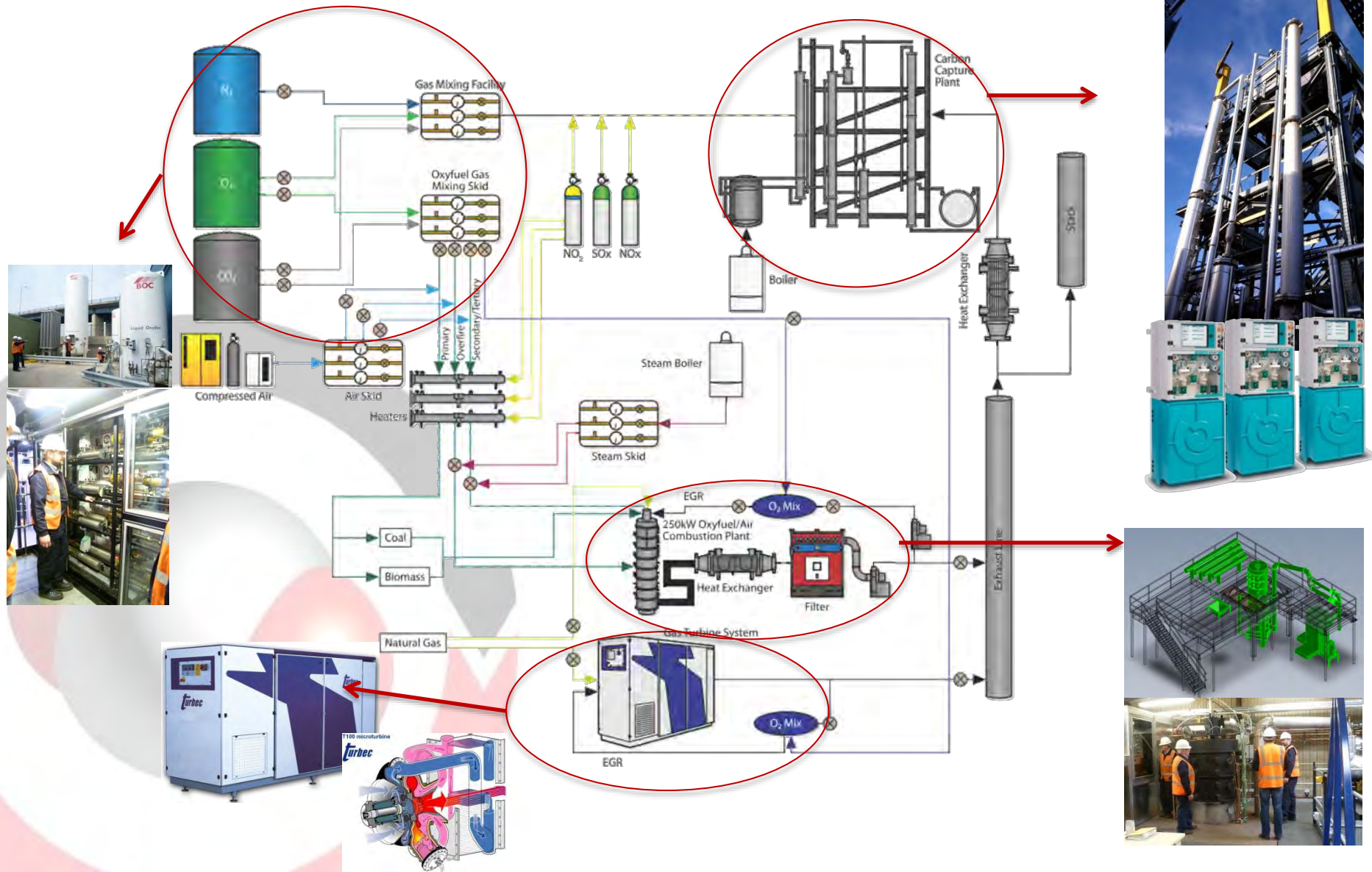


PACT Cranfield Facilities

- 150kW PF Air/Oxy Rig
- CO₂ Transport Flow Rig
- 50kW Chemical Looping Facility
- 750kW Gas Turbine Burner with deposition probes
- 300kW Circulating Fluidised Bed Combustor/Gasifier



PACT Core Facility: Integrated Facilities



Research challenges in CCS



Part 2 - Identify and help deliver cost-effective pathways to deploy CCS across the whole energy system

- Urgent need to transform CCS system concepts
- ... and develop the underpinning science to deliver cost-reduction,
- to engage with policy, regional and industry stakeholders
- ... and support new commercial, social and technical approaches.

New CCS system concepts and some areas for cost reduction research



Cross-cutting issues

- CCS role in net-zero emission energy systems and pathways
- BECCS interactions with biomass and land use constraints
- Social, policy and commercial viability for CCS delivery models

Combined power, industry and hydrogen clusters

- Novel capture technologies e.g. solids and membranes, for a range of applications
- Gas to power with capture – post-combustion and oxyfuel
- Gas to hydrogen with capture – SMR with CCS and novel routes
- BECCS and other GGR technologies
- Synergies between cluster components (including CCU)

Transport

- Shipping as well as pipeline

Storage

- Using wells and pore space more effectively
- Reliable long-term modelling for liability management
- Offshore EOR
- UK test site

Greenhouse gas removal technologies required before 2050 - and limited biomass available



UK Committee on Climate Change

<https://www.theccc.org.uk/wp-content/uploads/2016/10/UK-climate-action-following-the-Paris-Agreement-Committee-on-Climate-Change-October-2016.pdf>

- *The UK 2050 target to reduce emissions at least 80% from 1990 levels (i.e. less than around 160MtCO₂e/yr) is challenging and requires significant action across the economy, but can be met in various ways using currently known technologies.*
- *Our UK scenarios to 2050 include up to 67 MtCO₂/yr removals from three GGR options: afforestation, BECCS and wood in construction. BECCS could become capable of reducing emissions at a comparable cost to other technologies in the 2030s. This would require the Government to implement an effective new approach to CCS development and development of sustainable bioenergy supplies without locking these into alternative uses. Our scenarios include up to 47 MtCO₂/yr removed by BECCS while generating energy.*

NERC GGR programme just started – World First!

<http://www.nerc.ac.uk/research/funded/programmes/ggr/>

Direct Air Capture can capture CO₂ for storage to offset fossil fuel emissions or for synthesis of hydrocarbon fuels using non-fossil energy sources



<http://nas-sites.org/americasclimatechoices/>

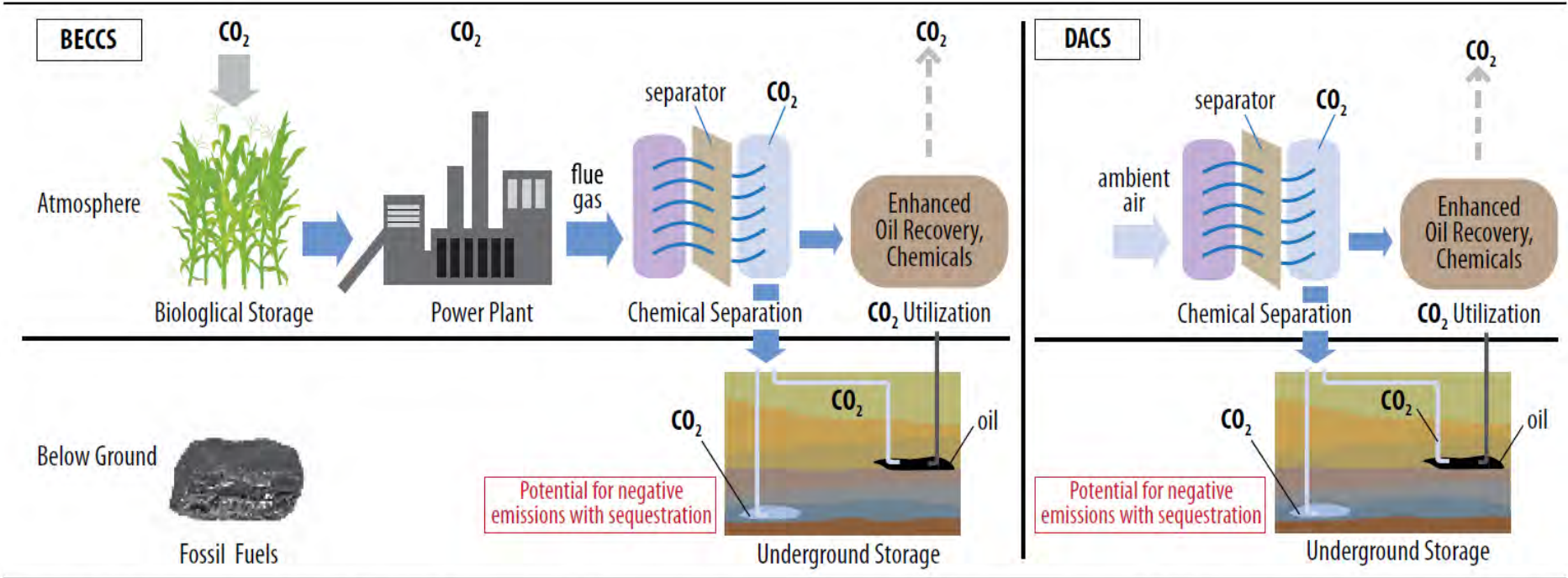


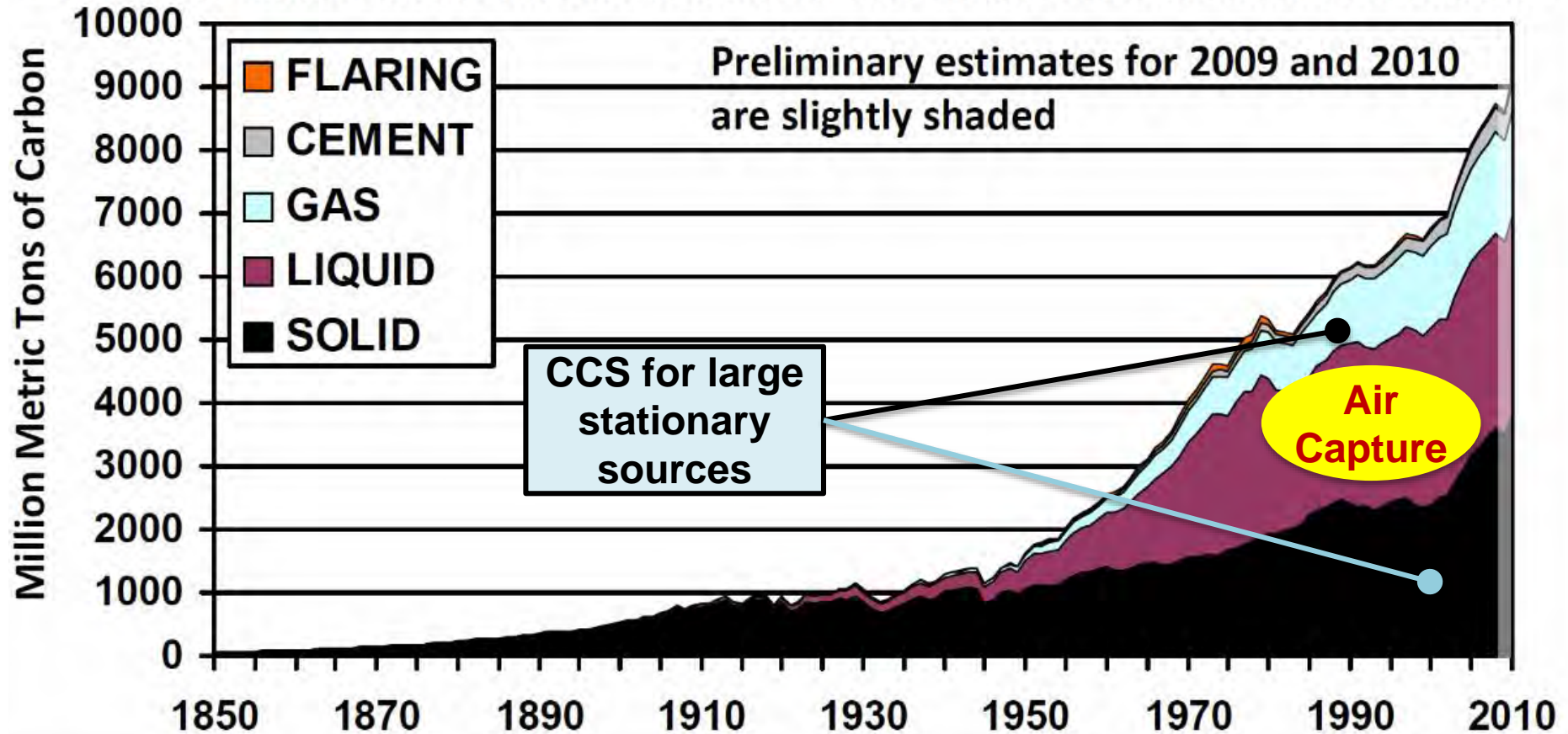
Figure 1. In Bioenergy with Carbon Capture and Sequestration (BECCS, shown on left), crops such as corn or switchgrass take up carbon dioxide from the atmosphere as they grow. The crops can be burned in power plants to produce electricity, and the carbon dioxide generated is captured and sequestered underground. In Direct Air

Capture and Sequestration (DACs, shown on right), carbon dioxide can be removed from the atmosphere as air passes through air filtering structures and is sequestered underground. Block arrows represent fluxes of carbon (as fuel or as carbon dioxide); dashed arrows indicate residual carbon dioxide emissions.

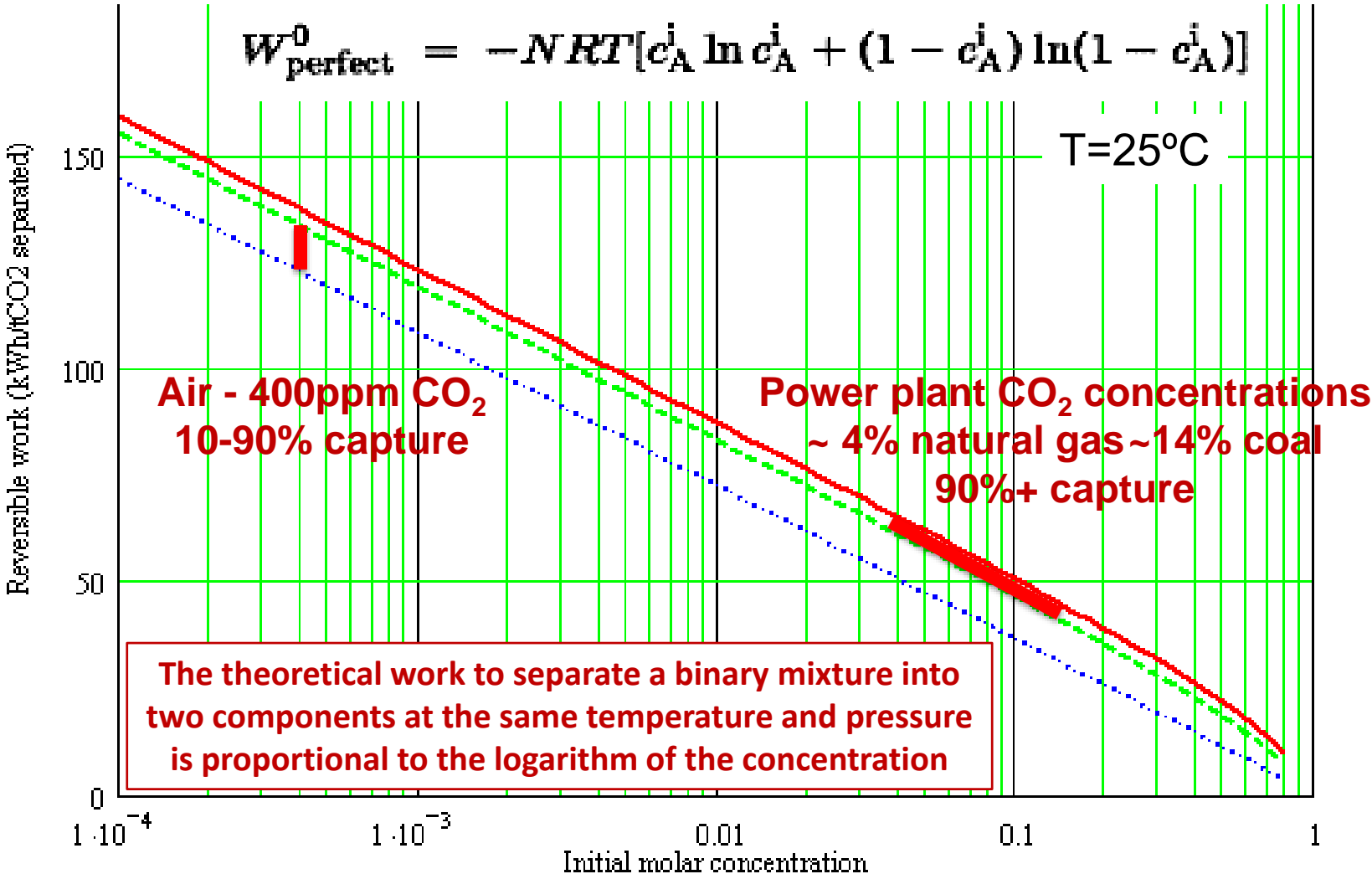
Significant fraction of fossil fuel use requires air capture

http://cdiac.ornl.gov/trends/emis/prelim_2009_2010_estimates.html

Estimates of Global Carbon Emissions from Fossil-Fuel Combustion and Cement Manufacture



Direct air capture requires only about twice the theoretical energy input of conventional CO₂ capture from power plants



- Full capture
- ⋯ 10% capture
- - - 90% capture

For example, see S. A. Amelkin, A. M. Tsirlin, J. M. Burzler, S. Schubert, K. H. Hoffmann, Minimal Work for Separation Processes of Binary Mixtures, Open Sys. & Information Dyn. 10: 335-349, 2003.

Status of CCS



- CCS has been transformed – its roles in the **net-zero emissions energy system** need to be researched and understood
- Social, policy and commercial viability is essential – Government, including the Treasury, must be on board
- Research communities need to develop and maintain capacity for cost-reduction research
- Plus the linkages to identify the right questions and deliver the answers to the users
- With support, fundamental research can help to deliver options to reduce costs before deployment in the 2020's
- And continue to reduce costs for the rest of the century