



2026

EUROPEAN HYDROGEN ENERGY CONFERENCE

SEVILLE

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ADVANCES IN HYDROGEN INFRASTRUCTURES IN SPAIN

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INDEX

- 2025: Green hydrogen, an energy vector that is forging ahead at an unprecedented speed
- Advances in the Spanish Hydrogen Backbone
- H2med, the most mature transnational corridor in Europe
- 2026 the next milestones in hydrogen in Europe and Spain
- Conclusions

2025: GREEN HYDROGEN, AN ENERGY VECTOR THAT IS FORGING AHEAD AT AN UNPRECEDENTED SPEED



Green hydrogen is a reality in Investment Decisions

WORLDWIDE

\$110 billion

Investment committed to low-carbon hydrogen projects **worldwide***

500+ projects

with **final investment decisions** made*

IN EUROPE

\$12 billion

Investment committed in 2025*

2.7 GW

Projected operational electrolysis capacity in the EU in 2026 → **x7** vs 2025

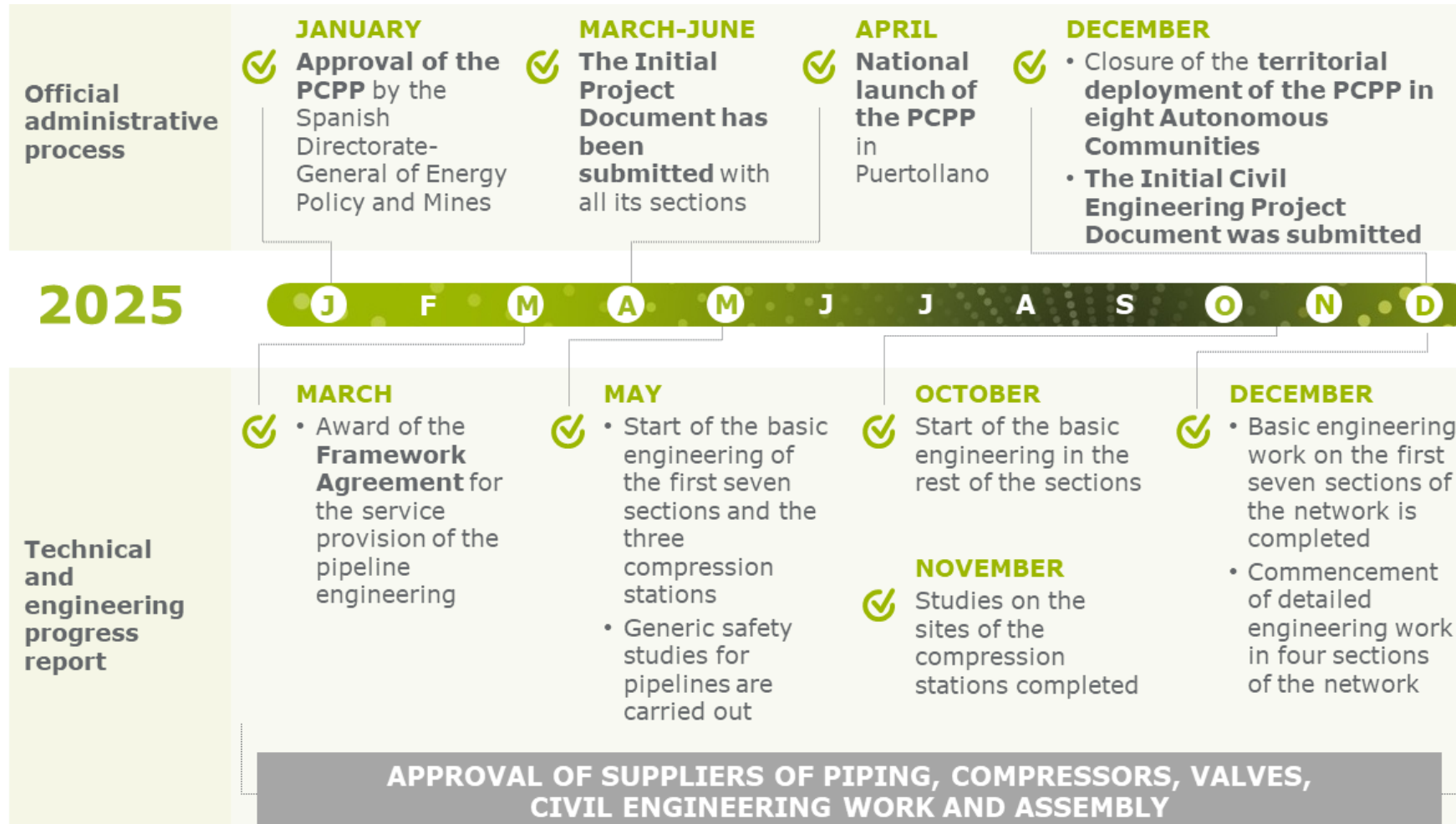
Source: ACER hydrogen monitoring report (Dec 2025)

Europe: the world leader in committed investments in 2025

*Source: "Global Hydrogen Compass 2025" (Hydrogen Council)

KEY DATES IN THE SPANISH HYDROGEN BACKBONE

Progress in Spanish Hydrogen Backbone in 2025



6 SPANISH ENGINEERING

EHEC 2026
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KEY DATES IN THE SPANISH HYDROGEN BACKBONE (North 1)



Progress in Underground Storage North 1 in 2025



ENGINEERING



PUBLIC ENGAGEMENT WITH THE SPANISH HYDROGEN BACKBONE



Conceptual Plan of Public Participation Spanish Backbone

13

ACs

25

provinces

+550

municipalities

2,600

km of pipelines

15

sections

5

axes

Aims of the public participation process

- Inform** with transparency
- Resolve** queries and explain
- Involve** the community
- Identify** and mitigate impacts
- Improve** the project's acceptance

Main informative and participatory measures

- Participatory meetings**
- Fixed and mobile **information points**
- Technical seminars** with experts
- Informative **materials**

Enagás is developing the **Conceptual Public Participation Plan (PCPP)** of the **Spanish Hydrogen Backbone** (PCI 9.1.3. Internal Hydrogen Infrastructure in Spain), approved by the Ministry for Ecological Transition and the Demographic Challenge, as per the procedure set out in the EU Regulation 2022/869

www.infraestructurasdehidrogeno.es



PUBLIC ENGAGEMENT WITH THE SPANISH HYDROGEN BACKBONE



Conceptual Plan of Public Participation Spanish Backbone

EXTREMADURA



CASTILE-LA MANCHA



ASTURIAS



CANTABRIA



ANDALUSIA



BASQUE COUNTRY



NAVARRRE



PROGRESS IN THE SPANISH HYDROGEN BACKBONE

Conceptual Plan of Public Participation Spanish Backbone



PROGRESS IN 2025

8
ACs
in 2025

294
municipalities
now involved

243,833
homes
mailshot

130
seminars
conducted

294
Information
points

≈10.000
leaflets
distributed

Institutional support at the highest level and strong support from the industry and the local fabric in all Autonomous Communities

PROGRESS IN H2 PROJECTS AND INFRASTRUCTURE IN SPAIN






Proposed additional sections to complete The Backbone

Submitted to TYNDP* 2026 (24/10/2025)

Goal: submission to the call of the 3rd PCI list in 2026

- 1** Coruña-Zamora
- 2** Huelva-Algeciras
- 3** Castile and Leon (Zamora-Haro)
- 4** Castile- La Mancha** and connection with Madrid

-  Spanish hydrogen infrastructure included in the European Commission's first list of PCIs, (08/04/2024)
-  Proposed additional sections to complete the backbone
-  H2med (included in the European Commission's 1st PCI list)



*TYNDP: Ten-Year Network Development Plan

** Partially included in TYNDP 2024

2025: GREEN HYDROGEN, AN ENERGY VECTOR THAT IS FORGING AHEAD AT AN UNPRECEDENTED SPEED



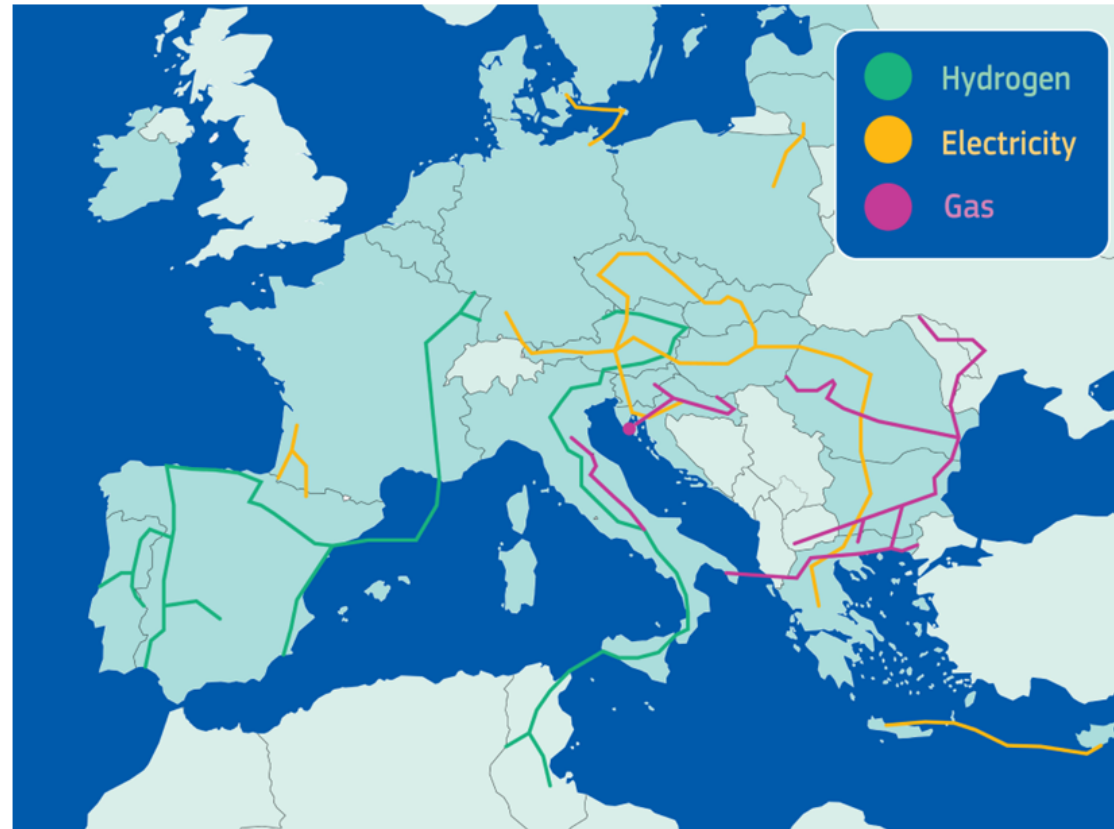
H2med: A European Hydrogen Highway, Grid Package

Energy Highways and EU Grids Package

The Spanish hydrogen backbone and H2med are among the eight priority **Energy Highways** for the EU, within the South-East Hydrogen Corridor.

Fast track: these projects will see real and tangible progress in the short term, with fast-tracked official administrative processing.

Europe speeds up the development of renewable H2 infrastructures and makes it easier to obtain permits, simplifying red tape and boosting interconnections among countries



Source: European Commission



H2MED: THE MOST MATURE TRANSNATIONAL CORRIDOR IN EUROPE



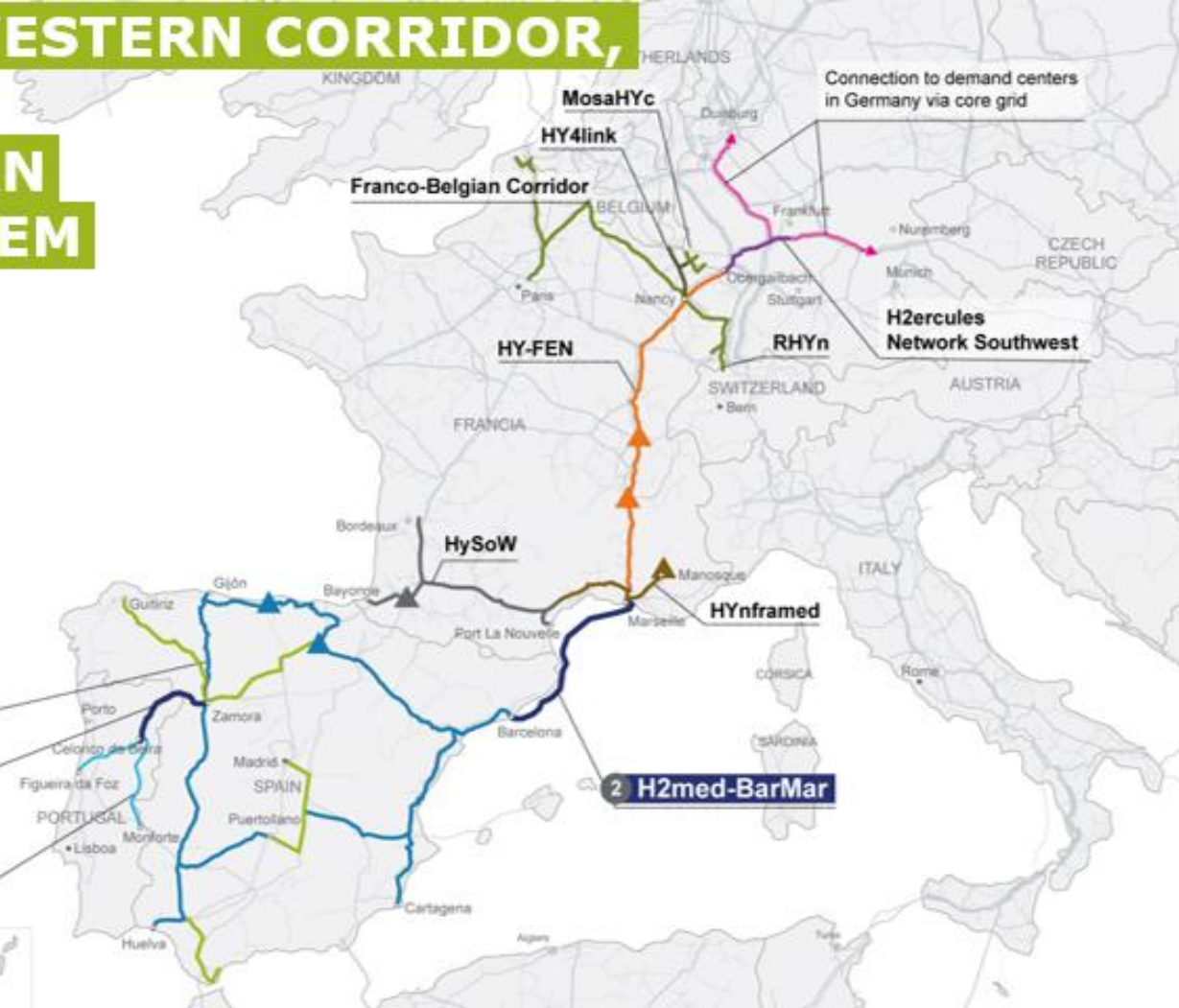
**H2MED/SOUTHWESTERN CORRIDOR,
THE BACKBONE
OF THE EUROPEAN
HYDROGEN SYSTEM**



Spanish
Hydrogen Backbone

1 H2med-CelZa

Portuguese
Hydrogen Backbone



H2MED: THE MOST MATURE TRANSNATIONAL CORRIDOR IN EUROPE



H2med makes faster progress In 2025

JANUARY

Granting of the CEF funds requested for assessments and engineering

MAY

European Commission VP **Teresa Ribera** visits the Barcelona plan, the exit point of BarMar

AUGUST

"Flagship project" according to the Franco-German Council of Ministers

NOVEMBER

- Geophysical studies of BarMar completed
- Technical feasibility of BarMar and COD confirmed
- Development of CelZa's Public Participation Conceptual Plan (PCPP) in Spain

2025

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FEBRUARY

Presentation of the results of the H2med Call for Interest

JUNE

- Incorporation of BarMar SPV
- Signing of Grant Agreements with CINEA
- European Commission VP **Teresa Ribera** receives the CEOs of H2Med

SEPTEMBER

H2med Alliance event in Berlin

DECEMBER

H2med, Energy Highway priorities for the EU

H2MED: THE MOST MATURE TRANSNATIONAL CORRIDOR IN EUROPE

H2med makes faster progress in 2025



Berlin 24.09.2025

H2med Alliance:
cooperation framework of the entire
hydrogen value chain in Europe



UPCOMING H2 MILESTONES IN EUROPE AND SPAIN IN 2026

Milestones envisaged in 2026



MILESTONES IN EUROPE AND IN SPAIN

- Closure of the **3rd auction of the EU Hydrogen Bank**
Results of the auction in Q2
- **Publication of the 2nd PCI/PMI list**
- **Candidature for the 3rd PCI/PMI list**
- **European networks package.** Negotiation in the Parliament and Council throughout the year
- **Transposition of the RED III and H₂ Directive in the Member States**
- **H2med: ministerial meeting of the High Level South-east Europe Group.**
- **Bill for the Transposition of the H₂ Directive and Low- Carbon Gases Act,** which will lay the foundations of the hydrogen regulatory framework
- **Addition of new sections to the TYNDP**

H2MED- BARMAR

- Completion of the **conceptual engineering of the compression station**
- Deployment of the **public participation plan in Spain and France**
- Completion of the **pipeline environmental assessments**
- **Start of the Front End Engineering and Design (FEED)** phase of the underwater pipeline, including the extended engineering of the compression station
- Drafting of the **Termsheet for capacity contracts** for conditions of access and allocation of capacity of BarMar

H2MED-CELZA

- **Completion of detailed engineering:** Spanish section
- **Completion of the Environmental Impact Assessment (EIA):** Spanish section
- Performance of **environmental impact assessments:** Portuguese section



UPCOMING H2 MILESTONES IN EUROPE AND SPAIN IN 2026

Milestones envisaged in 2026

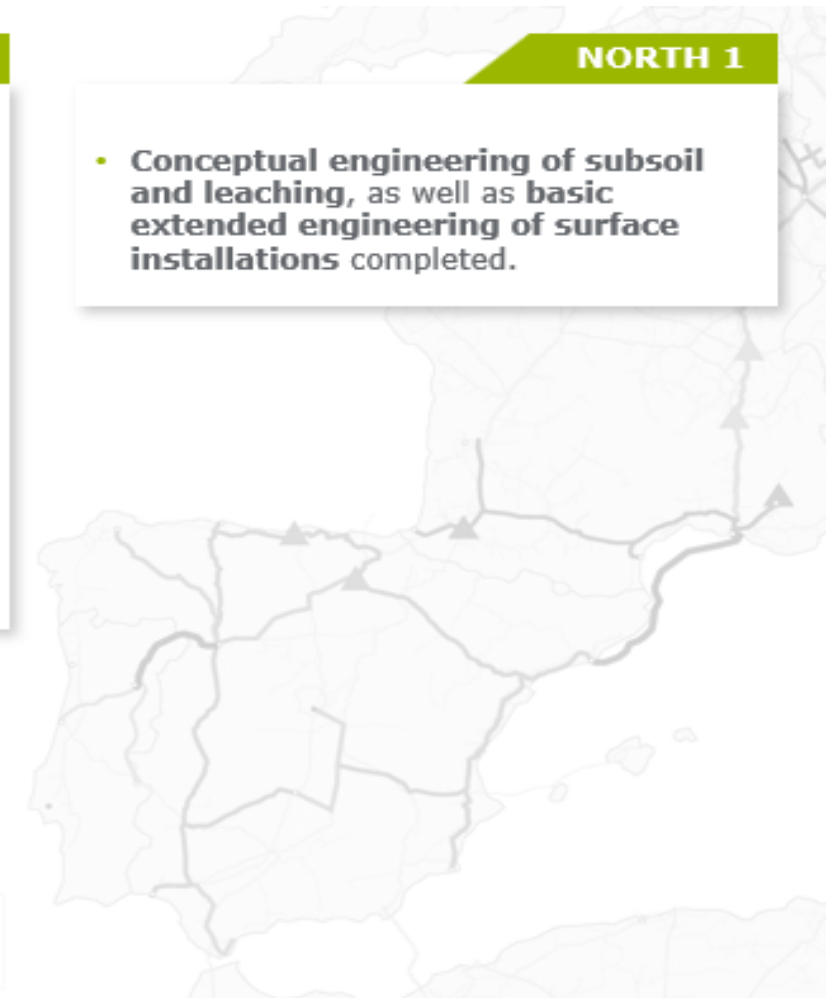


BACKBONE

- **Conceptual public participation plan completed**, once it has been deployed in the thirteen Autonomous Communities
- **Progress in official administrative processing as per regulation TEN-E** of all phases that make up the backbone project.
- **Performance of detailed engineering for pipelines** and digitisation model at an advanced stage.
- **Submission of first environmental impact assessments.**
- **Basic extended engineering in the three compression stations** completed, including selection of manufacturers.
- Submission of **Investment Request** to regulatory bodies
- **Identification of priority sections** supported by trailblazing projects

NORTH 1

- **Conceptual engineering of subsoil and leaching**, as well as **basic extended engineering of surface installations** completed.



CONCLUSIONS



The climate emergency and the EU's commitment to strategic autonomy demand that the green hydrogen agenda be deployed faster.

Renewable hydrogen is now in the FIDs and in the strategic plans of the industry worldwide.

2026 is the year when the investment cycle in hydrogen will be deployed as a key vector for decarbonising Europe, with intense **growth in installed capacity and investment decisions.**

Infrastructure projects are moving forward throughout Europe, with the backing of the European Commission, member States and the TSOs/HTNO, as an indispensable requirement for creating the hydrogen market.

In particular, the **Spanish backbone and H2med are forging ahead** in terms of their administrative, engineering and commercial development, confirming the technical feasibility and the commissioning dates.

Europe is stepping up to the plate to deal with the challenges, and it advances when we work together. Hydrogen is a team effort, more essential and urgent than ever. **Together with the Spanish and European value chain, Enagas will continue to fulfil the calendar as planned to make it a reality.**



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