

Transmission infrastructure: An H₂ investment enabler

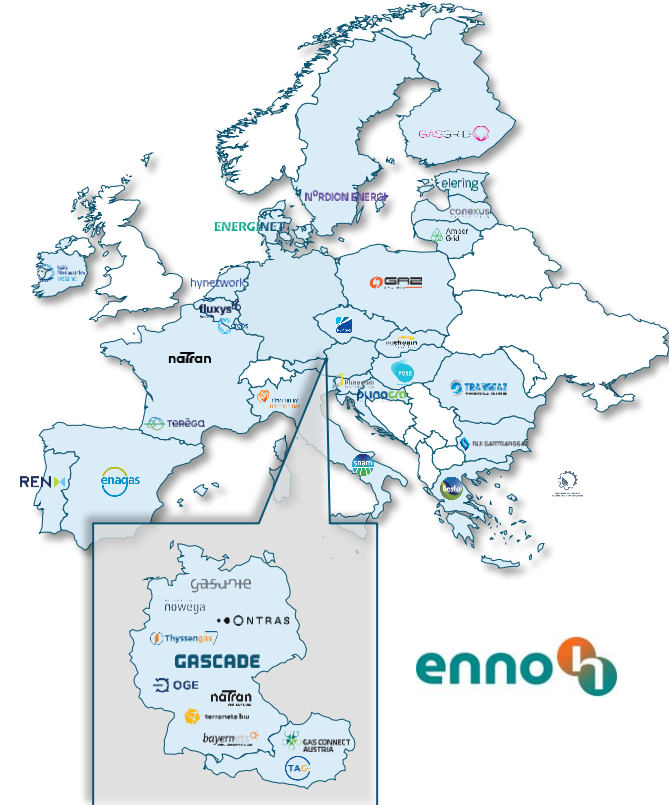
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Tampere, 14 Januar 2026



Boosting EU Resilience and Competitiveness

- 36 energy infrastructure operators building a **pan-European hydrogen network** by repurposing gas pipelines and constructing new ones
- Strengthening **energy security** and supporting industrial decarbonization
- **Investment needs for H₂ pipeline infrastructure: ~ €105 bn by 2040¹**
 → Investment needs for electricity transmission network: ~ € 470 bn by 2040
- **Focus on regulatory & market integration:**
 Hydrogen network planning now coordinated by ENNOH
- **Outlook:** 58,000 km of hydrogen pipelines handling up to 1,350 TWh in 2040 and up to 2,300 TWh in 2050



1) European Commission (2025)
 Investment needs of European energy infrastructure - Publication of the EU

The German Kernnetz: 9,000 km of H₂ pipeline ready by 2032



LARGE hydrogen grid in the core of Europe:
~9,000 km / **EUR 19 billion investment**



EUROPEAN
interconnection points to 8 German neighbouring countries



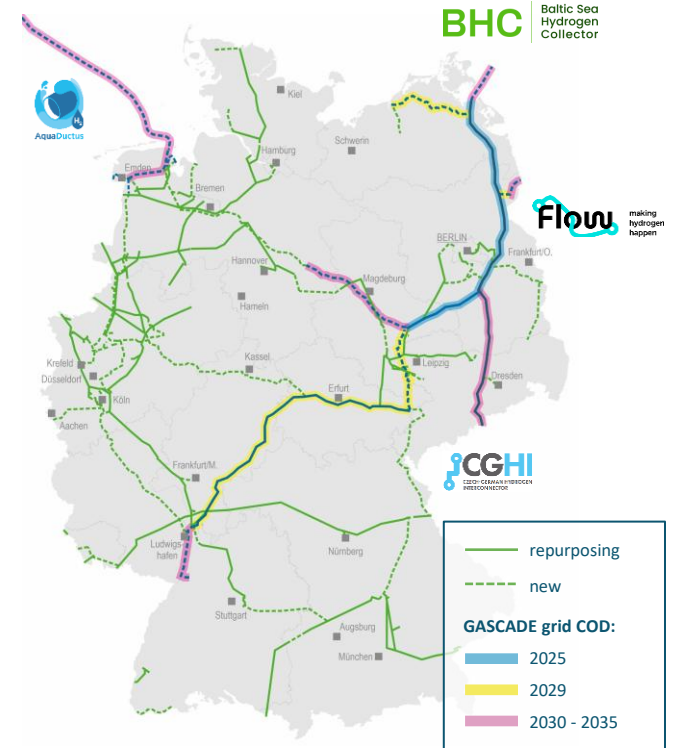
SUSTAINABLE
around **60%** of the core network consists of **repurposed pipelines**



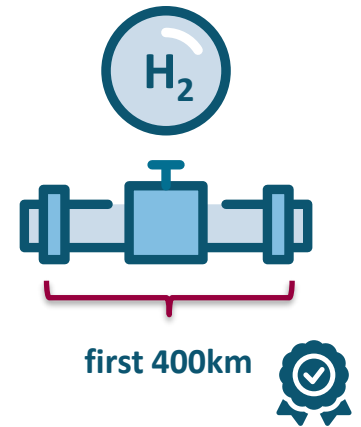
FAST
The first pipelines have been put into operation in **2025**



Private financing, de-risked by state guarantee
Grid financed by tariffs from current and future network users
German state takes (min. 76% of) risk of failed H₂ market ramp-up



World's first H₂ pipeline repurposing at scale completed



Key enabler: Baltic Sea Hydrogen Collector (BHC)



The Baltic Sea Hydrogen Collector (BHC) is an **offshore hydrogen pipeline** connecting Finland, Sweden and the Baltics to central Europe

- Section A: **Finland to Germany** (German-Danish EEZ boarder)
- Section B: **Sweden to Finland**, as well as Åland and Gotland
- GASCADE's **Kernnetz project** (German landfall to EEZ boarder)



Potential to add connections to **Denmark, Poland** and the **Baltics**



~1,250 km pipeline system with an annual transport capacity of up to **120 TWh** or **3 million tons** of hydrogen



PCI status & CEF funding support (15.3 MEUR) by the European Commission



One of the **most promising European hydrogen transport corridors**; directly connecting into Flow – making hydrogen happen

BHC | Baltic Sea Hydrogen Collector



GASCADE

CIP Central Energy Infrastructure

GASGRID

Finnish hydrogen: Good for Europe. Good for Finland.

Good for Europe.



Low-cost renewable H₂ from Finnish abundant land & onshore wind



Secure EU supply without political / transit risk



Competitive decarbonization for industry



Reduces import dependency and price volatility



Good for Finland.



Monetizing Finland's sustainable land & wind-based LCOE advantage at scale



Stimulation of investments in wind, H₂ and grids



H₂-industry at scale can boost GDP growth



Strengthening energy resilience and stabilizing prices domestically





Government support

Let's remind our governments what's in for their countries and that such projects will never be realized without their strong support.



European regulation

Let's advocate together for establishing a European de-risking mechanism similar to the German core network to get over chickens and eggs.



Potential customers

Let's join forces as BHC-alliance and actively support developing the project and the hydrogen industry – locally, for Finland and for Europe.