

National Assessment of Carbon Management Potential in Romania's Just Transition Regions

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Key Messages

Carbon management (CM) technologies could play a significant role in supporting Romania's Just Transition regions by enabling emissions reductions, as well as maintaining industrial activity and safeguarding employment in regions reliant on heavy industry. Romania is well placed to advance these solutions, given the concentration of hard-to-abate sectors in these regions and favourable geological conditions for CO₂ storage.

While national strategies acknowledge the importance of both carbon capture and storage (CCS) and carbon capture, utilisation and storage (CCUS) for decarbonising these industries, the commitments are not yet reflected in concrete regional planning or implementation frameworks. The assessment points to the need to better integrate CM into regional decarbonisation efforts and broader transition planning, as current progress is slowed by a misalignment between national priorities and local realities. Addressing this will require a more coherent approach that connects policy, industry and communities.

By targeting reskilling efforts, ensuring early, transparent community engagement and clarifying roles for stakeholders across all levels, carbon management could contribute not only to climate objectives but also to regional socio-economic stabilisation of Just Transition regions.

Mesaje cheie

Tehnologiile de gestionare a carbonului (CM) ar putea juca un rol semnificativ în sprijinirea regiunilor de Tranziție Justă din România, permițând reducerea emisiilor, precum și menținerea activității industriale și protejarea locurilor de muncă în regiunile dependente de industria grea. România se află într-o poziție favorabilă pentru a promova aceste soluții, având în vedere concentrarea sectoarelor cu emisii greu de redus în aceste regiuni și condițiile geologice favorabile pentru stocarea CO₂.

Deși strategiile naționale recunosc importanța atât a captării și stocării carbonului (CCS), cât și a captării, utilizării și stocării carbonului (CCUS) pentru decarbonizarea acestor industrii, angajamentele nu se reflectă încă în cadre concrete de planificare sau implementare regională. Analiza subliniază necesitatea unei mai bune integrări a CM în eforturile regionale de decarbonizare și în planificarea mai amplă a tranziției, întrucât progresul actual este încetinit de o discrepantă între prioritățile naționale și realitățile locale. Adresarea acestei probleme va necesita o abordare mai coerentă, care să coordoneze mediul politic, industria și comunitățile.

Prin valorificarea eforturilor de reconversie profesională, asigurarea unei implicări timpurii și transparente a comunității, dar și prin clarificarea rolurilor actorilor implicați la toate nivelurile, gestionarea carbonului ar putea contribui nu numai la obiectivele climatice, ci și la stabilizarea socio-economică a regiunilor de Tranziție Justă.

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List of Abbreviations and Acronyms

BF-BOF	Blast Furnace-Basic Oxygen Furnace
CCS	Carbon Capture and Storage
CCUS	Carbon Capture, Utilisation and Storage
CM	Carbon Management
CO ₂	Carbon dioxide
CO ₂ e	Carbon dioxide equivalent
DRI-EAF	Direct Reduced Ironmaking-Electric Arc Furnaces
EO	Emergency Ordinance
EU	European Union
EU ETS	European Union Emissions Trading System

Gt	Gigatonne
ICMS	Industrial Carbon Management Strategy
JT	Just Transition
JTF	Just Transition Fund
Ktpa	Kilotonnes per annum
LTS	Long-Term Strategy
Mt	Megatonne
Mtpa	Megatonnes per annum
NECP	National Energy and Climate Plan
NGO	Non-Governmental Organisation
NP	Nitrogen, Phosphorus
NPK	Nitrogen, Phosphorus, Potassium
PAM	Policy and Measures
SME	Small and Medium-Sized Enterprise
TJTP	Territorial Just Transition Plan
UBB	Universitatea Babeş-Bolyai (Babeş-Bolyai University, Cluj)
UPB	Universitatea Politehnică din Bucureşti (Polytechnic University of Bucharest)
UPG	Universitatea Petrol-Gaze din Ploieşti (Petroleum-Gas University of Ploieşti)
UTCN	Universitatea Tehnică din Cluj-Napoca (Technical University of Cluj-Napoca)

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1. Summary Overview

Just transition refers to the shift toward a climate-neutral economy, ensuring the future and economic well-being of workers and communities that have historically depended on coal and heavy industry.¹ Its purpose is to align decarbonisation with economic stability, social protection, and the development of new regional opportunities. Structural change should not deepen existing vulnerabilities but instead strengthen long-term resilience.

In this context, carbon management (CM) could provide a viable pathway for maintaining industrial activity in regions such as Hunedoara, Galați, Prahova, and Mureș¹, where large emitters remain central to local economies. According to the measures included in the National Energy and Climate Plan (NECP)ⁱⁱ, CM can reduce emissions while supporting industrial competitiveness and preserving employment, objectives that align directly with the goals of just transition.

However, this potential is not yet reflected in regional planning. CM, specifically through Carbon Capture and Storage (CCS), is only briefly referenced in Territorial Just Transition Plans (TJTJs), without concrete measures for project development, workforce transition, or infrastructure readiness. This gap highlights the need for a clearer analytical foundation to support the effective integration of CM into regional planning.

To address this need, the present document offers the necessary inputs for assessing both the implementation and the socio-economic impacts of CM projects in Just Transition regions.²

2. National Policy Context

Romania has integrated CCS/CCUS into its main strategic documents, yet the practical capacity to implement these commitments remains uneven, reflecting the institutional and operational shortcomings identified in the Capacity-Gap Assessment Studyⁱⁱⁱ:

- The Long-Term Strategy^{iv} sets climate neutrality as a target by 2050 and foresees capturing 50% of mineral-industry emissions, but it does not outline concrete plans for CO₂ transport and storage infrastructure.
- The updated NECP (2025-2030)^v identifies CCS as essential for hard-to-abate sectors and introduces two key measures: PAM6, which supports geological assessments, pilot projects, and the development of a Carbon Management Strategy

¹ Although the EU Just Transition Mechanism covers six counties in Romania (Gorj, Hunedoara, Dolj, Galați, Prahova and Mureș), Gorj and Dolj, being coal- and gas-based respectively, are only touched upon, since CM technologies are not applicable to their industrial profiles.

² [The Just Transition Mechanism \(JTM\)](#) is a key tool to ensure the transition to a climate-neutral economy is fair and inclusive. It provides targeted support to mobilise around €55 billion between 2021-2027 in the regions most affected, helping to ease the socio-economic impacts of the transition.

by 2025 alongside €750 million for at least three projects by 2027 and PAM9, which establishes a binding CO₂-storage obligation for oil and gas operators by 2030.

- The Energy Strategy 2025-2035^{vi} identifies CCS as a technological option for reducing CO₂ emissions from industrial sources and supporting long-term decarbonisation, although it does not yet provide a clear financial implementation framework.

The legislative framework, based on the transposition of the EU CCS Directive (Emergency Ordinance 64/2011^{vii}, approved by Law 114/2013^{viii}) has recently been strengthened through Emergency Ordinance 139/2024^{ix}, which clarifies storage regulations, simplifies permitting, and expands institutional roles. Secondary legislation is still under development.

2.1. Government Bottlenecks

A first bottleneck relates to limited public awareness and understanding of CM technologies. As noted in the Capacity Gap Study, low awareness among institutional actors and the wider public weakens support for CM and slows project development. While national policy commitments exist, Romania does not yet have a dedicated National Carbon Management Strategy, and the policy framework remains largely at a declarative level. Strengthening administrative capacity across key ministries and regulatory bodies will be necessary to enable effective implementation.

These challenges are also visible at the regional level. Only Mureş County explicitly references CCS in its development strategy, but the commitments remain high-level and non-operational, not fully exploring its potential as a driver for workforce development.^x In Valea Jiului (Hunedoara and Gorj counties), the 2022-2030 Development Strategy^{xi} acknowledges CCUS as an emerging technology aligned with EU objectives, but does not outline concrete implementation steps, funding mechanisms, or institutional responsibilities. The other JT counties have not integrated or further developed any CCS measures into their strategic planning, limiting references to the objectives outlined in the NECP.

Moreover, local administrations currently lack defined roles in citizen and stakeholder engagement on CM, and coordination with central authorities remains weak.

2.2. Enabling Factors

The analysis of policy gaps^{xii} and public perception^{xiii} shows that unlocking CM deployment in Romania's vulnerable and JT regions will require a set of targeted enabling conditions across the social, institutional, and regional dimensions. These factors are necessary to bridge the current gap between national ambitions, regional vulnerabilities, and the practical preconditions for project development.

- **Social and just transition dimension**

Scepticism toward new technologies and concerns about employment security remain high.^{xiv} Addressing these issues requires structured and transparent

engagement, particularly from local authorities, supported by communication that clearly connects CM to job stability and future industrial investment.

Reskilling programmes developed by universities such as UPB, UTCN, the University of Petroșani, UBB, and UPG could help workers transition into CM-related technical roles, reinforcing social acceptance and ensuring that communities directly benefit from new industrial opportunities.

- **Legal and institutional dimension**

Developing the National Carbon Management Strategy and designating a national coordinating body would provide legal clarity and reduce the institutional fragmentation. Equally important is the timely development of secondary legislation to operationalise recent regulatory updates and ensure consistent implementation across sectors and regions.

- **Geographic and regional accelerators**

Several regions present favourable starting conditions for CM due to their concentration of industrial emitters and proximity to potential geological storage formations. Areas such as Prahova - Argeș, Constanța, Mureș, Galați, and Gorj-Hunedoara demonstrate a concentration of major emitters and favourable geological conditions, indicating potential for developing regional CM hubs.

3. Potential for Development

3.1. Carbon Emission Sources - Sectoral Analysis

The assessment examines the potential for CM in Romania's hard-to-abate industrial sectors located in JT regions, taking into account emissions level, capturable CO₂ potential, efficiency, as well as addressing storage potential and future opportunities. These sectors have high process-related CO₂ emissions and limited alternative abatement options yet remain socio-economically important for regional transition efforts.

Out of the six counties covered by the Just Transition framework in Romania, four were identified as hosting hard-to-abate industrial activities with potential relevance for carbon management deployment. These activities are primarily concentrated in sectors such as fertilisers, cement and lime, steel production and oil refining.

To better contextualise the potential relevance of these installations within Romania's future carbon management deployment, the analysis firstly considers baseline emissions for each facility.³ The mapped counties and their key industrial installations include:

³ To ensure consistency across sectors, the baseline emissions for each installation correspond to the highest verified emissions reported in the [EU ETS](#) between 2019 and 2023.

- **Mureş County:** Fertiliser production represented by Azomureş, with baseline emissions of 1,735,741 tCO₂e.
- **Hunedoara County:** Cement and lime industries located in Chişcădaga, including the cement plant operated by Heidelberg Materials and the lime production facility operated by Carmeuse, with baseline emissions of 664,484 tCO₂e and 122,568 tCO₂e, respectively.
- **Prahova County:** Oil refining activities concentrated around Petrobrazi Refinery, Petrotel Refinery and Vega Refinery. Baseline emissions are 1,078,584 tCO₂e (Petrobrazi), 821,328 tCO₂e (Petrotel), and 50,646 tCO₂e (Vega).
- **Galaţi County:** Steel production represented by LIBERTY Steel Galaţi, with baseline emissions of 4,394,990 tCO₂e.

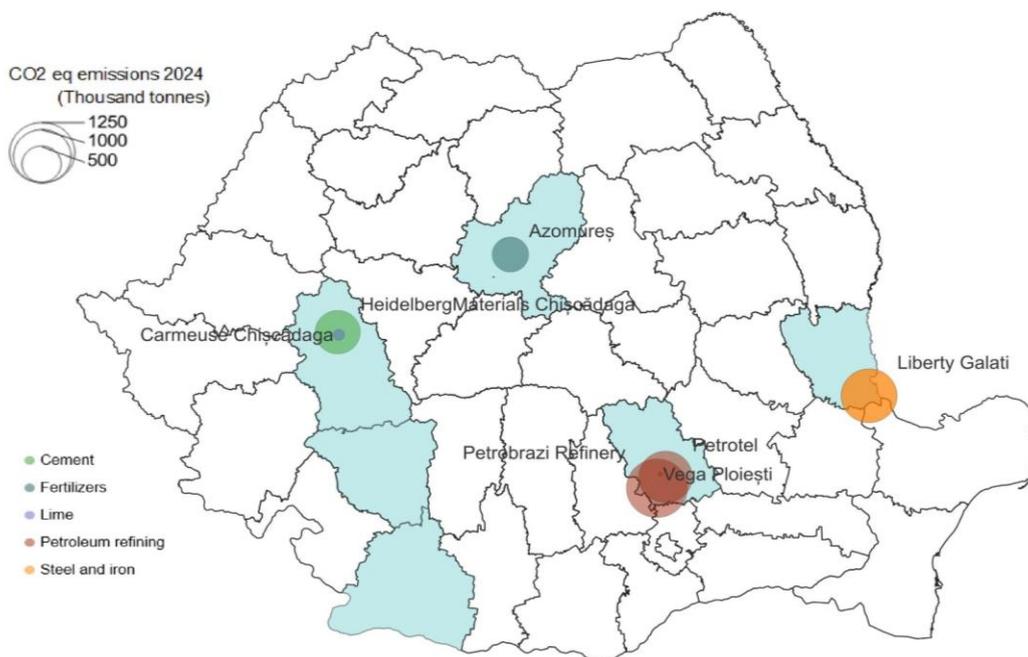


Figure 1: Hard-to-abate industries across Just Transition regions

Source: EPG

Estimating the exact capturable CO₂ potential for these facilities in Romania is particularly complex to assess, but sectoral CM potential can be inferred from available literature and existing practice.

In the cement industry, CCUS can reduce around 55-60% of process-related emissions^{xv}, targeting residual emissions that cannot be abated through other means.⁴ This aligns with

⁴ It is important to note that fuel combustion emissions can also be reduced through CCUS; however, the current assumptions focus on residual process emissions, under the premise that other measures are already applied to abate the remaining fuel-related emissions.

IEA projections of 47% emissions reduction by 2030 and 63% by 2050 (average 55%^{xvi}). The fertiliser sector has documented examples of process-integrated CCUS. For instance, at Azomureş, around 32% of CO₂ from ammonia productions captured and subsequently used in urea and complex NP/NPK fertiliser production^{xvii}, illustrating existing capture and utilisation practices. For steel production, CCS applicability is limited due to high residual stack emissions, upstream methane from metallurgical coal and high energy demand. While retrofitting CCS to existing BF-BOF processes could theoretically reduce 40-70% of direct CO₂^{xviii} (consistent with the current furnace configuration at LIBERTY Steel Galați), the plant is transitioning to DRI-EAF routes using natural gas and renewable hydrogen^{xix}, representing a more feasible decarbonisation pathway.⁵ In the refining sector, practical capture rates are difficult to generalise because of dispersed sources and site-specific characteristics. Literature suggests that CCUS could theoretically reduce 50-70% of sectoral emissions^{xx}, but that is dependent on the technology and facility configuration.

This emission reduction potential depends on efficiency, which considers Romania's constraints in technology readiness, infrastructure availability, as well as political and legislative frameworks (i.e., the absence of secondary legislation and a National Carbon Management strategy). The Capacity Gaps Report^{xxi} further details these main limitations affecting both Romania and its Just Transition regions, including limited operational experience, the absence of CO₂ transport and storage infrastructure, insufficient geological characterisation of potential storage sites and the lack of a comprehensive regulatory framework.

3.2. Geological potential and implications

Understanding the limitations of capturing and transporting CO₂ is essential when considering secure and efficient storage. A visual overview of morphostructural units suitable for geological storage of CO₂ is provided in the map below, with detailed evaluations in *Annex 1. Table 1: Morphostructural units in Romania and their estimated CO₂ geological storage potential.*

Potential configurations include⁶:

- **Transylvanian CM hub:** connecting industrial sources to storage sites in the Transylvanian Depression.
- **Galați–Constanța industrial corridor:** leveraging proximity to the Black Sea continental shelf.

⁵ Production at the plant is currently limited, as the only operational furnace has been stopped since [summer 2025](#). Combined with [ongoing insolvency issues](#), there is no active production at present, creating uncertainties for future emissions and the applicability of CCS.

⁶ These formations are located within morphostructural units considered suitable for CO₂ storage, as identified under [EU Regulation 2024/1735 \(NZIA\)](#)

- **Prahova–Argeș and Gorj–Hunedoara clusters:** targeting emissions within the Precarpathian Depression.

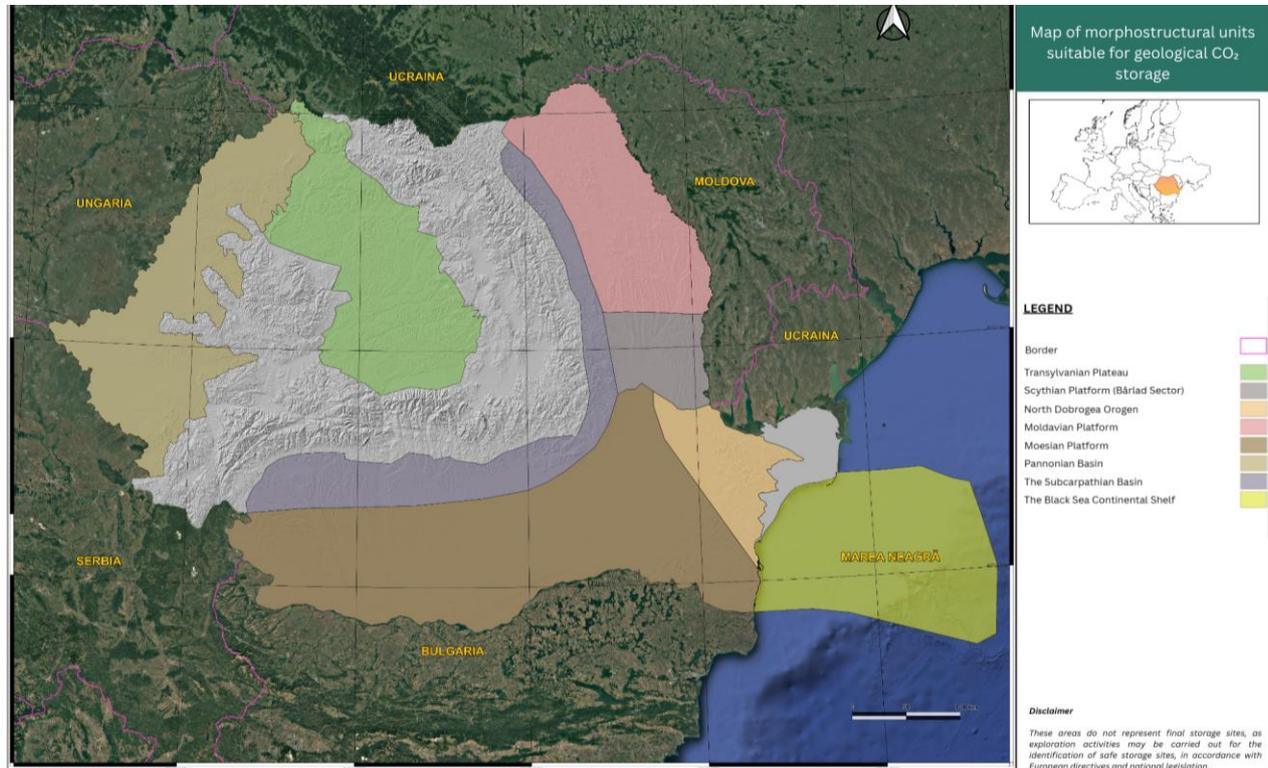


Figure 2: Map of morphostructural units suitable for geological CO₂ storage

Source: [ANRMPSG](#)

The map illustrates the areas in Romania where CO₂ storage sites could potentially be selected. These areas were identified based on estimates of Romania's theoretical storage capacity in saline aquifers and depleted hydrocarbon fields, as well as on the geological characteristics of sedimentary basins within the main morphostructural units, whose configuration is considered suitable for the permanent and safe storage of carbon dioxide. This potential is significant for three reasons:

1. **Concentration of large emitters:** Priority areas for early CM deployment coincide with Romania's major industrial point sources, as illustrated in Figure 2: *Map of morphostructural units suitable for geological CO₂ storage*
2. **Lack of viable alternatives:** For process emissions (e.g., cement production), CM remains the only scalable abatement option currently available.
3. **Socio-economic role:** CM supports climate objectives while also contributing to just transition goals in regions dependent on heavy industry.

4. CM Deployment in Transition Regions: Economic & Social Impacts

Economically, CM could stabilise and modernise energy-intensive industries by reducing EU ETS compliance costs and preserving industrial competitiveness. CM infrastructure development would also generate new employment opportunities across engineering, drilling, geological monitoring, logistics, and related services.

These economic gains could contribute to regional socio-economic stabilisation, understood here as maintaining employment levels, limiting outward labour migration, and preserving local economic activity in areas affected by industrial decline. Facilitated by strategic reskilling frameworks under the Just Transition Fund, the professional reconversion of workers, particularly from the extractive sectors in Gorj and heavy industry in Hunedoara, could serve as a buffer. This transition may help prevent structural unemployment, population loss, and the erosion of community networks, thereby preserving social cohesion and maintaining the economic viability of these regions during the decarbonisation process.

5. Public Perception and Stakeholder Engagement

Based on the research conducted for the Public Perception Study^{xxii}, understanding public and stakeholder perceptions emerges as a core requirement for advancing CM deployment in JT regions. The findings show that, although awareness of CM technologies is currently low, levels of curiosity and openness are relatively high providing a favourable foundation for early engagement. Survey responses and focus group discussions, particularly in Mureş County, reveal a pattern of cautious optimism: citizens perceive CM as a potential opportunity, contingent on transparent and timely information.

Industry stakeholders demonstrate a strong understanding of CM's role in preserving industrial competitiveness, yet they underline persistent challenges related to regulatory clarity, infrastructure, financing, and the need for consistent communication. Local institutions also recognise the strategic potential of CM but identify public acceptance as the most sensitive and uncertain factor.

Findings from the research conducted for this study on public perception indicate that the media landscape further reinforces these results. Coverage of CM in JT regions is minimal and largely neutral, suggesting low public visibility and a broader information deficit.^{xxiii}

6. Deployment Pathway & Timeline

Given the economic vulnerability of JT counties, CM could offer a viable decarbonisation pathway while supporting the transformation of local industrial bases. To ensure effective and equitable implementation, the deployment pathway should be guided by:

- **Governance and strategic alignment:**
Integrating specific roles for local and regional authorities into the forthcoming national CM strategy would be necessary to maintain coherence with JT objectives.
- **Planning, financing, and phased rollout:**
Deployment should combine collaborative planning between central and local administrations and industry, particularly for the design of regional CM hubs. Models such as project Carbon Hub CPT01^{xxiv} could be replicable approaches for counties like Hunedoara, Prahova, and Mureş.
- **Workforce transition and local capacity:**
Targeted reskilling and technical training delivered through regional universities can facilitate labour transitions. At the same time, sustained capacity building for local authorities can be strengthened through cooperation with NGOs, research centres, and universities.
- **Community engagement and equitable benefit:**
Early and continuous community engagement is necessary for building trust and addressing concerns transparently. This should be supported by clear, consistent communication that explains CM's purpose, safeguards, and the benefits for local communities.

7. Conclusions

The assessment shows that CM should be integrated in decarbonisation strategies for Just Transition regions. However, its full climate, social and economic potential remains insufficiently recognised. This is partly due to limited local awareness and technical understanding, combined with weak coordination between local and central authorities. Moreover, as highlighted in the Capacity Gaps Assessment, the lack of political commitment, both centrally and locally, further constrains the integration of CM into regional transition planning.

These findings point to the need for clearer strategic direction and coordinated action to ensure that CM can effectively support the objectives of a just transition.

8. Annexes

8.1. Annex 1. Table 1: Morphostructural units in Romania and their estimated CO₂ geological storage potential

Morphostructural Unit	CO ₂ storage capacity (Gt)	Surface area (km ²)	Observations
The Pannonian Basin	2,1	15000	

Morphostructural Unit	CO ₂ storage capacity (Gt)	Surface area (km ²)	Observations
The Transylvanian Plateau	8,8	22000	
The Subcarpathian Basin	-	-	Intensely tectonized and eroded deposits (exposed at the surface), therefore not recommended for geological storage of CO ₂ . ^{xxv}
The Moesian Platform	5,2	38000	Listed together with the foreland of the Southern Carpathians
The Moldavian Platform	2,5	24000	Listed together with the foreland of the Eastern Carpathians
The Scythian Platform	-	-	Potential CO ₂ storage in Neogene-Jurassic sands, conglomerates, limestones; protective clay and marl layers present ^{xxvi}
The North Dobrogea Orogen	-	-	Potential CO ₂ storage in Cretaceous-Triassic reservoirs; protective seals in Cretaceous-Triassic and Jurassic units. ^{xxvii}
The Black Sea Continental Shelf	-	-	Geological knowledge limited; potential CO ₂ storage in Neogene-Cretaceous reservoirs; structural, stratigraphic and lithological traps possible. ^{xxviii}

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