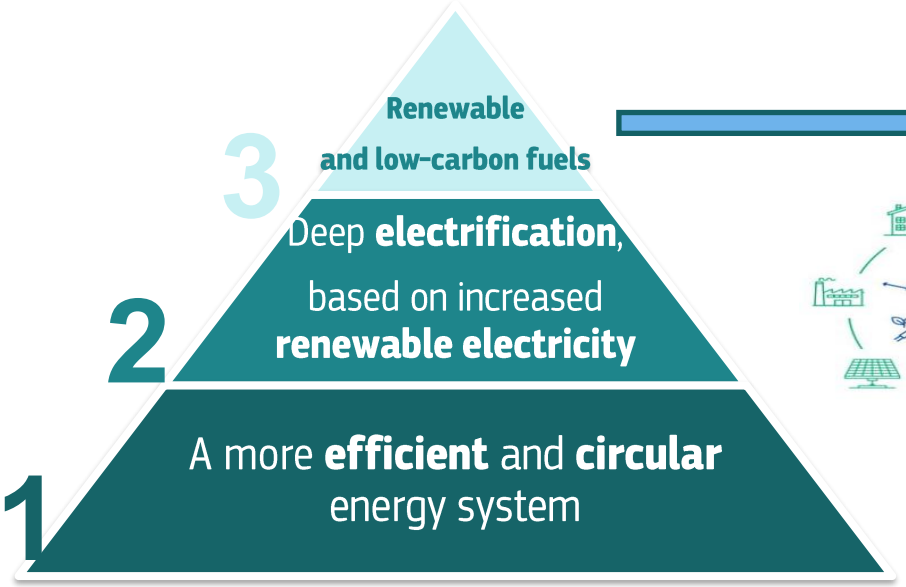
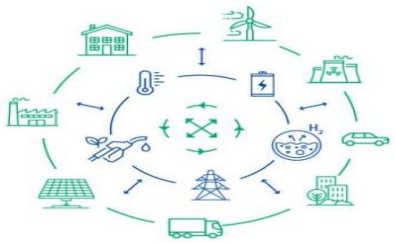
What incentives does the current EU legal and funding framework provide for the deployment of hydrogen?

Nouvelles dynamiques pour l'hydrogène en France et en Allemagne: strategies, production, demande

OFATE Debate, 6/10/2026

Beatrice Coda
Cheffe d'unité Transitions vers les Energies propres, Commission européenne, DG RTD





EU Hydrogen Strategy

1. Investment agenda
2. Creating demand
3. Markets & infrastructure
4. Research & Innovation
5. International cooperation

2025

- 6 **GW** of renewable power to power electrolysers
- Replace **existing hydrogen production**
- Regulation for liquid hydrogen markets
- Planning of hydrogen infrastructure

2030

- **40 GW** of renewable power to power electrolysers
- New applications in **steel and transport**
- Hydrogen for electricity balancing purposes
- 10 million tonnes produced + 10mt imported – cross-border logistical infrastructure

2050

- Scale-up to **all hard-to-decarbonise sectors**
- Expansion of hydrogen-derived **synthetic fuels**
- EU-wide infrastructure network
- An open international market with € as benchmark

Comprehensive hydrogen policy put in place since 2020

- Criteria for hydrogen certification
  - RFNBO DAs
  - Draft Low-carbon DA

- Permitting for manufacturing (NZIA)

- Market rules and infrastructure planning (Hydrogen market package and TEN-E)
- Targets for hydrogen refuel stations (AFIR)

- Targets for renewable hydrogen in industry & transport (RED)
- Renewable and low-carbon hydrogen in maritime & aviation sector (ReFuel)

Hydrogen production

Hydrogen infrastructure & markets

Hydrogen consumption

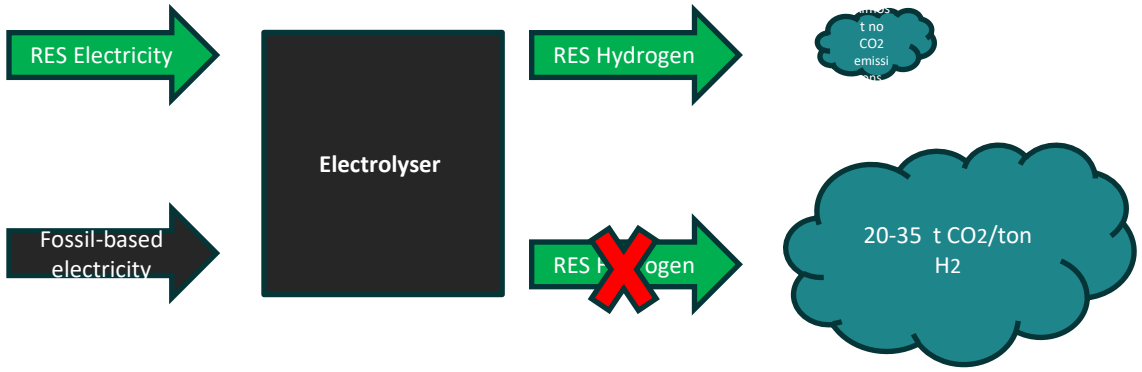
Hydrogen financing

- Rules for state aid for renewable and low-carbon hydrogen
- Cross-border hydrogen infrastructure (CEF) & hydrogen refuelling stations (CEF)
- Regional development programmes and recovery fund
- European Hydrogen Bank
- InvestEU / international EU development aid

RNFBO targets

- **RFNBO** – Renewable Fuels of Non-Biological Origin, including renewable hydrogen.
- We have a binding target for use in **industry** of 42% by 2030 and 60% by 2035.
- Binding target of at least 1% of the total energy supplied to the **transport** sector – combined target of 5.5% for advanced biofuels + RFNBOs
- New indicative target of 1.2% in the transport sector

Delegated act on renewable hydrogen



Additionality	• Increase production of renewable electricity
Temporal correlation	• Produce hydrogen when renewable electricity is available
Geographic correlation	• Produce hydrogen where renewable electricity is available

The EU requires renewable hydrogen classified as an RFNBO to achieve at least 70% life-cycle GHG emissions savings, alongside meeting renewable electricity sourcing and correlation rules.

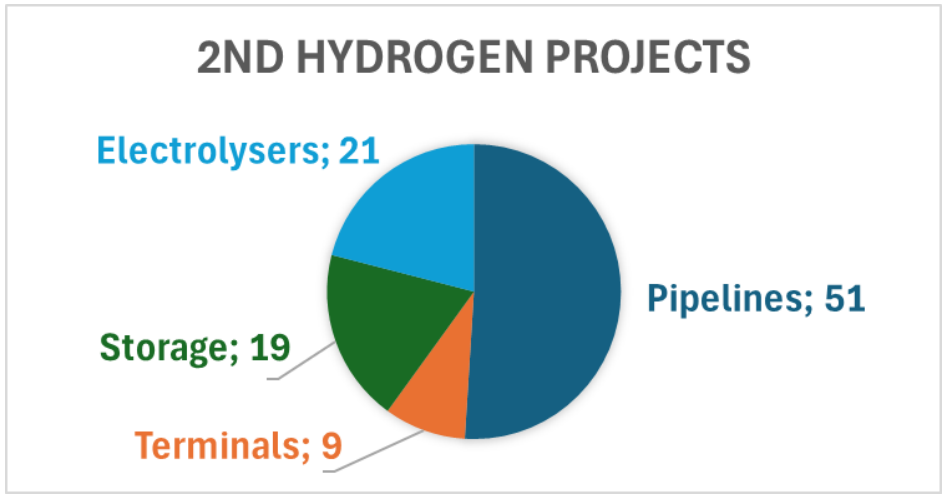
European Commission

Hydrogen and Gas Package

- Replaces fossil gas with renewable hydrogen, biomethane, and synthetic gases to meet 2030 climate targets and 2050 net-zero goals, while repurposing existing gas infrastructure.
- Introduces certification (guarantees of origin), market regulations, and infrastructure standards, including dedicated H2 networks and limited blending (5–10%) with natural gas.
- Long-term contracts for unabated fossil gases cannot run beyond 2049.
- Supports domestic production (via electrolysers) and imports, with strict sustainability criteria.
- Requires national hydrogen strategies, establishes a new EU H2 network operator (ENNOH), and aligns with REPowerEU to reduce fossil gas dependence while ensuring security of supply.

Trans European Network

2nd PCI/PMI list – 100 H2 projects



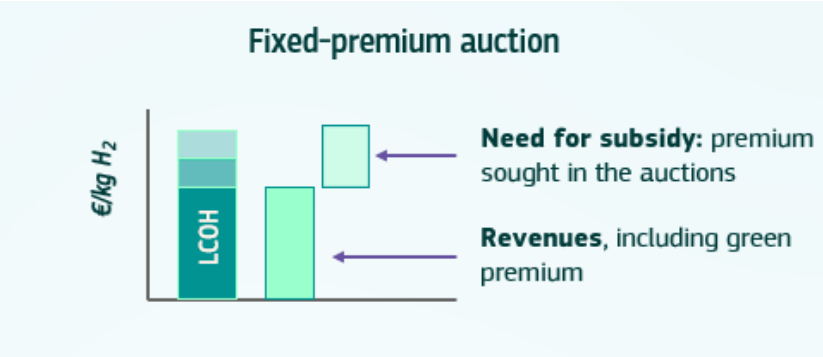
- 35% more hydrogen projects in the Union list
- Significant increase in storages and pipelines

- **Next PCI/PMI process for H2 - submission closed last 30 Sept 2026.**

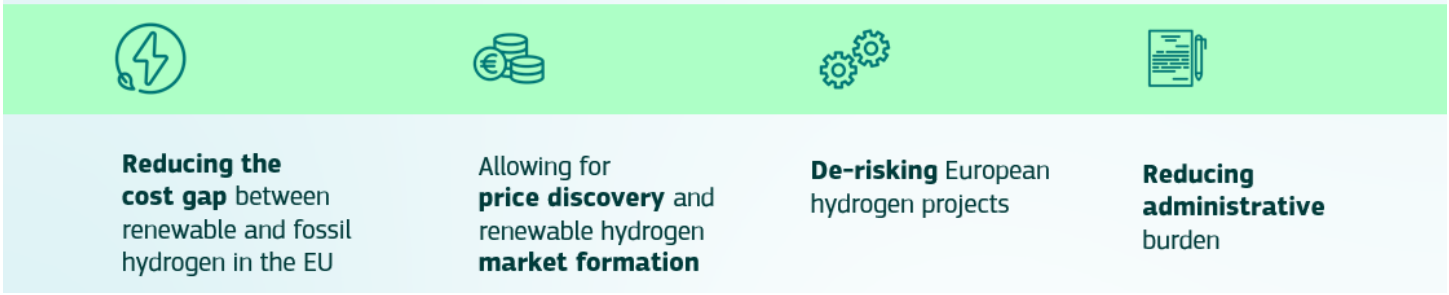


European Hydrogen Bank

- **First** (Feb 2024) and **second** (Feb 2025) auctions awared EUR 720 million to seven projects and 270 million to six projects, respectively.
- **Third** auction closed this February, and awarded over EUR 1 billion to nine projects to produce 1.1 GW/1.3 Mt of hydrogen across seven EEA countries.
- Paid as a fixed premium in €/kg for max 10 years.
- **Auctions-as-a-service** offered to MSs looking to move towards their H2 targets – Spain and Germany awarded extra EUR 1.7 billion in national funds.



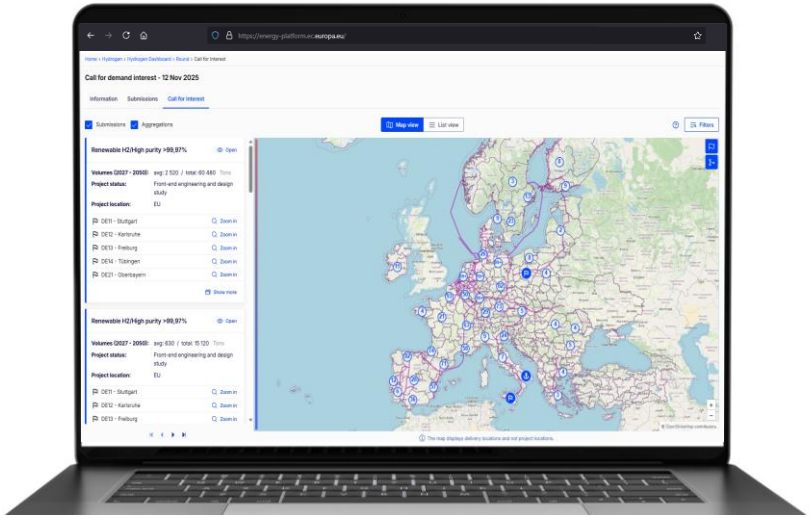




European Commission

European Hydrogen Mechanism

A web-based application supporting the development of the Hydrogen market by:



1 **Connecting demand and supply** of existing and future H2 (e.g. “call for interest” round)

2 **Supporting** infrastructure development (e.g. “infra. market test” round)

3 **Linking with financial support**
Display and match with relevant products

Already 170 European and global companies active

Round 1 results

265
supply projects
12 Nov. 2025 - 02 Jan. 2026

45
offtake projects
19 Jan. - 20 Mar. 2026

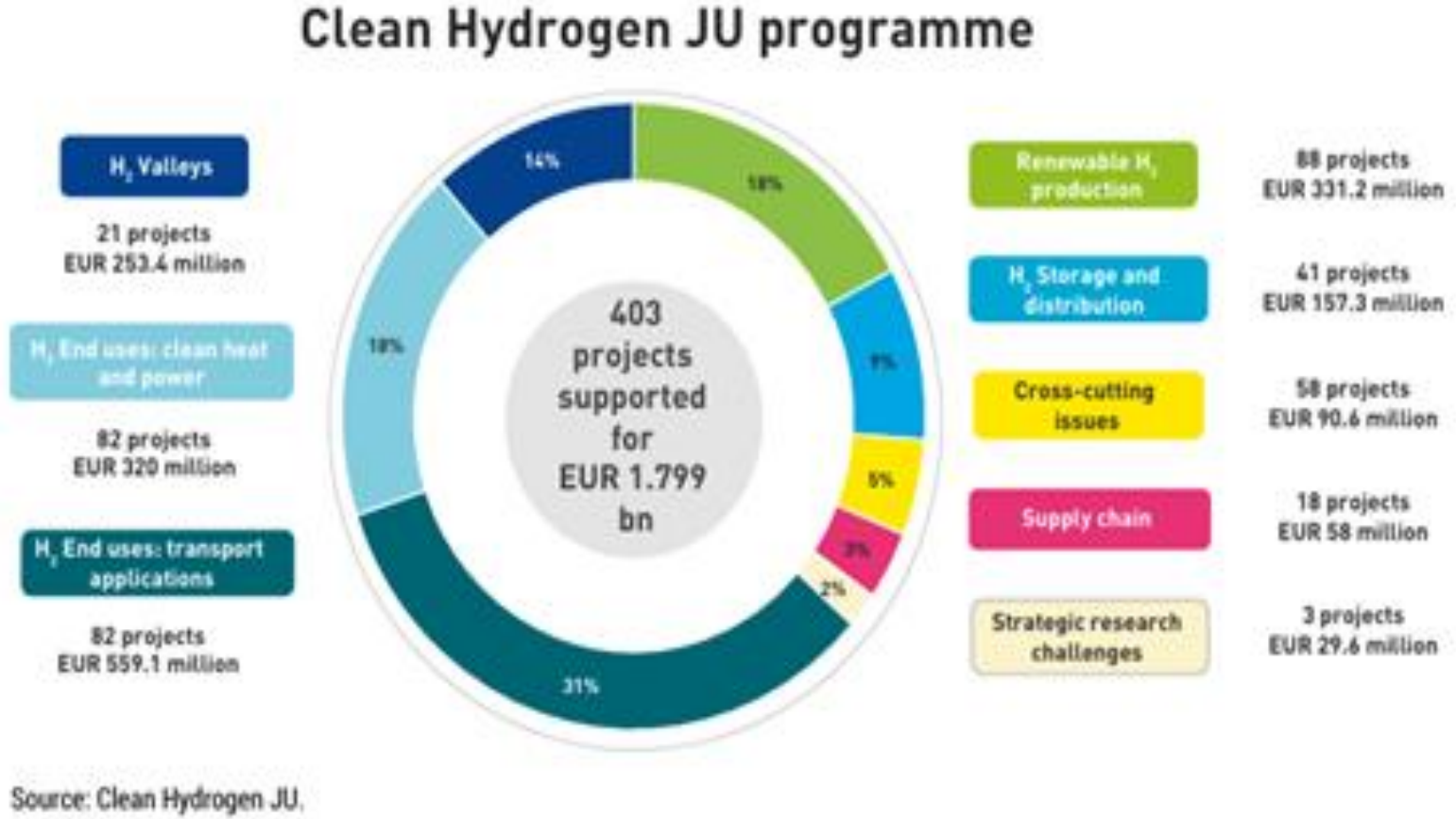
87%
Success rate
**Suppliers having at least 1 match*
50%** have at least **3 matches

European Commission

EU R&I funding – Clean Hydrogen JU

2008-2025: 1,799.2 M€

Figure 2: Projects supported by the Clean Hydrogen JU per pillar and annual financial contribution (2008-2024)



Source: Clean Hydrogen JU.

European Commission

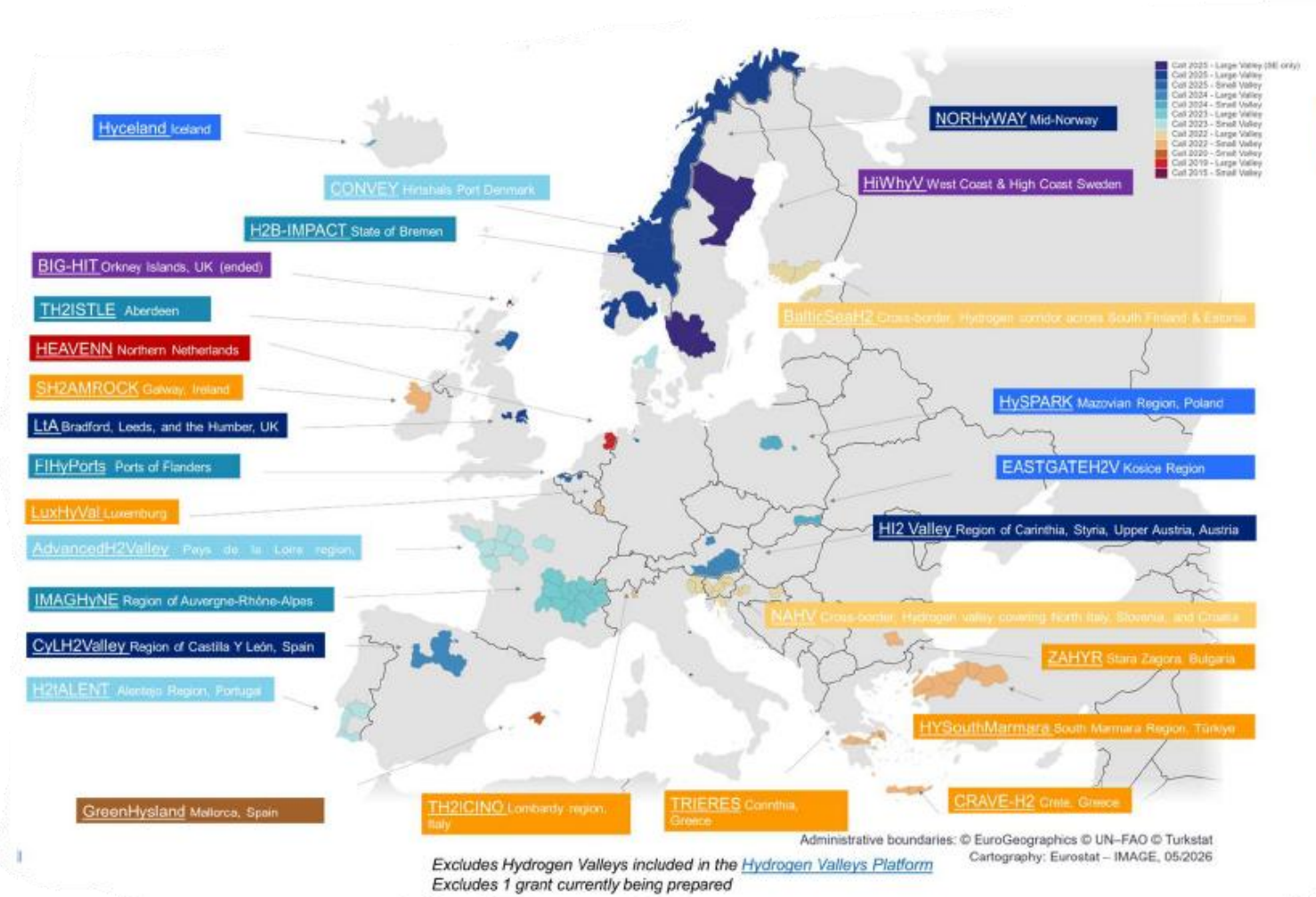
European Hydrogen Valleys



- A hydrogen valley is a regional hydrogen ecosystem where production, infrastructure and different uses of hydrogen are connected in one place
- Joint declaration on Hydrogen Valleys (March 2023).
- Communication on a "**Roadmap on Hydrogen Valleys**" – published summer 2024 during the Hydrogen Valley Days.
- Altogether, the Clean Hydrogen JU has supported to date **27 hydrogen valleys** projects across 23 European countries. Together they represent project costs of more than €1.6 billion, with total JU funding of €328 million.
- **Hydrogen Valley Facility**, to provide project development assistance to current and future developers, launched last year, running for 5 years (12.5 MEUR support).

European Commission

Hydrogen Valleys



27 Hydrogen Valleys

Total costs 1,638 M€

Across 23 countries

JU funding 338 M€

600+ unique partners

135+ SMEs with 27% of the funding

European Commission

Thank you!



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