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**SENSITIVE\***

## COMMUNICATION FROM THE COMMISSION

### **The Clean Industrial Deal: A joint roadmap for competitiveness and decarbonisation**

INTERNAL

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## 1. Introduction

**Europe's industrial base is central to our identity and essential for our competitiveness.** Our continent has a rich industrial heritage. For decades, our industries have been at the forefront of technological progress. They fuelled economic growth and sustained our social model. They now need a promising future, and Europe – with its many strengths - is the right place. It has the talents, the entrepreneurs, businessmen and women, and workers. It has the ability to drive innovation and shape global progress. And it has a strong social market economy underpinned by a predictable legal environment.

**However, Europe is grappling with rising geopolitical tensions, slow economic growth and technological competition.** The EU must urgently address three challenges at once: a climate crisis and its consequences, competitiveness concerns and economic resilience. As the Draghi report<sup>1</sup> highlights decarbonisation policies are a powerful driver of growth when they are well integrated with industrial, competition, economic and trade policies. Our industries, particularly those facing high energy prices and fierce global competition, are facing existential challenges. We risk being outpaced by other major powers in terms of productivity growth. This calls for urgent action.

**This is why Europe needs a transformational business plan, a Clean Industrial Deal, bringing together climate and competitiveness under one overarching growth strategy.** It is a commitment to accelerate decarbonisation and reindustrialisation, both at the same time and across the entire continent. It must present European industry with a stronger business case for large climate neutral investments in energy intensive industries and clean tech.

**We aim to increase sustainable and resilient production in Europe.** Europe has set out an ambitious framework to become a decarbonised economy by 2050. It will stay the course, including through the intermediate 2040 target of 90%. This framework can drive competitiveness, as it gives certainty and predictability to companies and investors alike. This will be achieved by nurturing competitive manufacturers who drive decarbonisation through innovation, create quality jobs and contribute to our open strategic autonomy.

The focus will be mainly on two closely linked sectors. Firstly **energy-intensive industries, which require urgent support** to confront high energy costs, unfair global competition and complex regulations, harming their competitiveness. Secondly **the clean-tech sector, which is a key enabler of industrial transformation, competitiveness and decarbonisation.** It is indispensable to reach our climate neutrality targets, absorb emissions and maintain water resilience.

**Circularity will be a priority.** It is the key to maximising the EU's limited resources, reducing dependencies and enhancing resilience. It reduces waste, lowers production costs, lowers CO<sub>2</sub> emissions and creates a more sustainable industrial model that benefits the environment and enhances economic competitiveness. The ambition of the Clean Industrial Deal is to make the EU the world leader on circular economy by 2030.

**For a thriving new European industrial ecosystem of growth and prosperity, it is essential to move beyond traditional silo solutions and look at the entire value chain.** There are six business drivers: (1) affordable energy, (2) lead markets, (3) financing, (4) circularity and

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<sup>1</sup> [https://commission.europa.eu/topics/eu-competitiveness/draghi-report\\_en#paragraph\\_47059](https://commission.europa.eu/topics/eu-competitiveness/draghi-report_en#paragraph_47059)

access to materials, (5) global markets and international partnerships and (6) skills. These should be complemented by actions on horizontal enablers necessary for a competitive economy: cutting red tape, fully exploiting the scale of the Single Market, promoting quality jobs and better coordinating policies at EU and national level.

**The Clean Industrial Deal confirms the EU's dedication to its decarbonisation goals by offering clear business incentives to decarbonise within Europe.** The measures it proposes are the result of the active engagement of industry leaders, social partners and civil society through the Antwerp Declaration for a European Industrial Deal and the Clean Transition Dialogues. Our proposals are directly tailored to their needs. **At this pivotal moment for European industry,** the Clean Industrial Deal aims to open a new chapter of European industrial history defined by growth, resilience, and leadership on the world stage.

## **2. Access to affordable energy**

As average energy prices in Europe are higher than those of our trading partners, affordable energy is a key condition for the competitiveness of our industry, especially for energy-intensive sectors. **Access to affordable energy is therefore a cornerstone of the Clean Industrial Deal.**

Europe's dependence on imported fossil fuels is the main cause of these higher, and more volatile, energy prices. This situation has been exacerbated by the recent energy crisis and the weaponisation of gas supply by Russia. The current geopolitical and market uncertainty drive up investment costs which are passed on to consumers.

In addition, more structural inefficiencies in the electricity system raise energy costs and have an impact on the energy bills of European industries. Insufficient interconnections and grid infrastructure, as well as limited energy system integration and flexibility hinder the further integration of cheaper decarbonised energy sources. The EU must advance towards electrification and a fully integrated single market for energy.

To reduce energy costs in the EU, we need to accelerate the transition to clean, domestically generated energy, complete our internal energy market with physical interconnections, and use energy more efficiently. We need to deliver on a genuine Energy Union that benefits all. To do so, an **Action Plan for Affordable Energy**<sup>2</sup> is adopted today. It includes measures to lower energy bills for industries, businesses and households in the short term, while speeding up necessary structural reforms.

With the cooperation of Member States and the private sector, the Action Plan will have a transformative effect, respecting the principle of technology neutrality. The bulk of the Action Plan will be delivered already in 2025. Passing on the benefits of cheaper energy to end users will support the industry's business case to invest in electrification and decarbonisation. Investors also want certainty. The National Energy and Climate Plans (NECPs) are essential tools in this regard, especially if Member States' national strategies to achieve the 2030 climate and energy goals are translated without delay into concrete action.

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<sup>2</sup> COM (2025) XX final

In the Action Plan, three flagships are particularly relevant to industry: (1) lowering energy bills, (2) accelerating the roll-out of clean energy and electrification, with completed interconnections and grids, as well as clean manufacturing (3) ensuring well-functioning gas markets.

## 2.1. Lowering electricity bills

Lowering the cost of electricity supply starts with fully implementing the **reforms introduced in the recently adopted Electricity Market Design**<sup>3</sup>. A fast increase of Power-Purchase Agreements (PPAs) and Contracts for Difference (CFDs) is key to making clean energy production more attractive for industrial users and final energy bills less dependent on volatile fossil fuels in short term markets.

More can be done to support the uptake of PPAs. **The Commission is launching today, with the European Investment Bank (EIB), a pilot programme for corporate Power Purchase Agreements (PPAs)** for an indicative amount of EUR [XX] million. Under this pilot, the EIB will counter-guarantee part of the PPAs undertaken by businesses, preferably small- and midcaps as well as energy intensive industries, for the long-term purchase of new renewable electricity generation. This will allow renewable energy project developers to finalise investment decisions by de-risking the offtake of PPAs. **The EIB will also introduce a ‘Grids manufacturing package’** for the European supply chain to provide counter-guarantees and other de-risking support to manufacturers of grid components, with an indicative amount of EUR [XX] billion. This will provide these businesses with long-term certainty to ramp-up production. More generally, the EIB will continue the higher pace of energy investments, at EUR [XX] billion per year, and considers further instruments to scale up further.

**The Commission will simplify State aid rules by July 2025** to accelerate the roll-out of clean energy, deploy industrial decarbonisation and ensure sufficient capacity of clean tech manufacturing in Europe (see section 4.3 for more details).

To ensure greater revenue stability for renewables project promoters, **the Commission will provide guidance to Member States on how to combine PPAs and contracts for difference** in line with State aid rules. This will be paired with the adoption by the Commission of new **rules on cross-border forward capacity allocation** by 2026. These rules will allow large industrial consumers to secure the electricity production they need to operate. This will also contribute to developing forward markets and make for a more secure long-term supply of electricity. Furthermore, the Commission will seek Member States’ views on a clean flexibility instrument based on PPAs and industry committing to consume new clean electricity, while designing it in a way that sufficiently limits the risks of competition distortions and subsidy races in the Single Market, as required by State aid rules.

Industrial consumers have a great potential to adjust demand to the supply of cheap clean energy consuming more when prices are low and less when they are high. Providing products tailored to the needs of different industrial and other consumers could enable industries, on a voluntary base, to make immediate savings from their energy bills. The Commission will develop by 2025 **guidance to Member States and retailers on promoting remuneration of flexibility in retail contracts**.

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<sup>3</sup> Directive (EU) 2024/1711; Regulation (EU) 2024/1747

To provide short-term relief to industry, in particular energy-intensive industry investing in decarbonisation, **Member States should also lower taxes on electricity to the legal minimum thresholds and eliminate levies that finance policies unrelated to energy.** In that regard, the **Commission will issue recommendations on energy taxation** and support adoption of the Energy Taxation Directive<sup>4</sup>. On network charges, the Commission will put forward a **recommendation and guidance on a harmonised design of tariff methodologies** for network charges, and considering their effectiveness, propose new legislation.

An efficient network system ensures that energy flows from where it is produced to where it is needed, ensuring that everyone benefits from energy at the best cost. The Commission will put forward a **European Grid Package** to simplify Trans-European Networks for Energy, ensure cross-border integrated planning and delivery of projects, especially on interconnectors, streamline permitting, enhance distribution grid planning, boost digitalisation and increase visibility on manufacturing supply needs.

As natural gas is expected to remain the main price-setter for electricity in the next years, the Commission stands ready to support Member States when designing State aid measures. These would allow Member States to address extreme price spikes and exceptional price environments and to decouple the translation of high gas prices into electricity prices, based on proven models in emergency situations.

## **2.2. Accelerating the roll-out of clean energy and manufacturing**

Energy-intensive industries need a steady and secure supply of clean and affordable energy. **Cutting permitting times for the deployment of grid, energy storage and renewables projects is essential.** However, so far only seven Member States notified full transposition of the more flexible permitting rules in the new Renewable Energy Directive. Member States should make the most of this opportunity, as this will bring more cheap electricity to the system. The Commission will, as an immediate deliverable, support Member States in transposition and implementation of existing energy permitting legislation. It will share best practices and recommendations and launch an implementation dialogue on energy permitting.

Lengthy permit-granting procedures are also a major concern for energy-intensive industries that want to electrify. This is why the Commission, in the upcoming **Industrial Decarbonisation Accelerator Act**, will **propose concrete measures to address permitting bottlenecks related to energy and industrial decarbonisation.** These measures will build on experience acquired through the Emergency regulation on permitting, the Renewable Energy Directive<sup>5</sup>, the Critical Raw Material Act<sup>6</sup> and the Net Zero Industry Act<sup>7</sup>.

Digitalisation plays an important role in the permitting process. It can speed up procedures and give greater timing predictability. The Commission will further incentivise the use of data spaces and AI to ensure that different data sets, including geological, spatial, natural ecosystem

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<sup>4</sup> COM/2021/563 final

<sup>5</sup> Directive (EU) 2023/2413

<sup>6</sup> Regulation (EU) 2024/1252

<sup>7</sup> Regulation (EU) 2024/1735

mapping or emissions data is easily accessible by the national authorities facilitating the decision-making.

### 2.3. Ensuring well-functioning gas markets that deliver

**The price of imported natural gas has a direct impact on both EU gas and electricity prices.** To reduce price volatility and speculation, markets must function properly. Full regulatory oversight and close cooperation between energy and financial regulators is required to prevent market manipulation and closing any possible loopholes related to lack of transparency, asymmetry of information and risk of market concentration.

Earlier this month, the Commission set up a **Gas Market Task Force to comprehensively scrutinise the EU natural gas markets** and, where necessary, take actions to ensure their optimal market functioning and prevent commercial practices distorting market-based pricing, learning from the lessons of the energy crisis. The Commission will launch a broad stakeholder consultation to assess the need for further legislative changes to ensure full and seamless regulatory oversight, align and strengthen energy and financial market rules (MiFID/REMIT<sup>8</sup>), and simplify and reduce the administrative burden on companies trading on financial markets for energy (single reporting). It will cover various aspects of the regulatory setup<sup>9</sup>, the joint supervision by energy and financial regulators and the creation of a joint database of all relevant transactions with full access to all regulators.

The Commission will work with Member States, also in the context of the Gas Storage Regulation<sup>10</sup> extension, to promote more coordinated and flexible gas storage refilling, including with dynamic targets, to reduce system stress linked to **gas storage refilling** and support summer preparedness.

Flagship actions - Access to affordable energy and infrastructure	Timeline
Action Plan on Affordable Energy	Q1 2025
EIB pilot to enable more financial guarantees for PPA offtakers, with a focus on SMEs and energy-intensive industry	Q1 2025
Clean Industrial Deal State aid framework	Q2 2025
Guidance on combining PPA and CfDs	Q4 2025
Guidance on promoting remuneration of flexibility in retail contracts	Q2 2025
Recommendations on energy taxation and tariff methods	2026
European Grid Package	Q1 2026

<sup>8</sup> Regulation (EU) 2011/1227; Directive (EU) 2014/65

<sup>9</sup> Including the parameters governing the application of the so-called ancillary activity exemption, the rules on circuit breakers and position limits, the requirements applying to trading venues and market participants.

<sup>10</sup> Regulation (EU) 2022/1032

Legislative proposal to accelerate permitting for renewables, grids, storage, and industrial decarbonisation (Accelerator Act)	Q4 2025
Legislative proposal on the extension of the Gas Storage Regulation	Q1 2025
KPI – Increase economy-wide electrification rate, <b>32% in 2030 (from 23% today)</b> <sup>11</sup> Eurostat data reported in the <b>Annual Single Market and competitiveness Report</b> KPI - install <b>annually 100 GW of renewable electricity capacity</b> in the period up to 2030 <sup>12</sup> .	

### 3. Lead markets: boosting clean supply and demand

**Building a business case for decarbonised products also requires concrete measures on the demand side.** Businesses will only make the necessary investments if they are sure there is a market for their products.

The Clean Industrial Deal will put the conditions in place for this demand to emerge. Creating lead markets for clean technologies and products will better position the EU as a global leader in the clean transition. It also increases its competitiveness in key clean sectors. Lead markets drive economies of scale, reduce costs, and make sustainable alternatives more accessible to consumers and businesses alike. This increased demand incentivises industries to accelerate their transition to cleaner production methods, reinforcing both environmental and economic benefits.

The new measures complement the roll-out of one of the EU's long-standing objectives, to create a market for captured carbon. The implementation of the Industrial Carbon Management Strategy<sup>13</sup> will build the business case for these permanent carbon removals to compensate for residual emissions from hard to abate sectors, including in the context of the review of the ETS Directive<sup>14</sup> in 2026. Measures will be developed to acknowledge the use of captured carbon in a wider range of products, and prevent double counting of embodied carbon emissions, should waste incineration be included in the ETS.

#### 3.1. Non-price criteria in public procurement and incentives for private purchases

**Public procurement policies are a powerful instrument to help overcome barriers to market entry and to support resilient industrial ecosystems, jobs and value creation in the EU.** Targeted mandates and criteria for local content can align national spending with the EU's broader decarbonisation and competitiveness agenda, ensuring that public spending benefits sustainability, prosperity and creation of high-quality jobs. This would also be a clear incentive for manufacturers to ramp up production.

**The future Industrial Decarbonisation Accelerator Act will introduce resilience and sustainability criteria to foster clean European supply in energy-intensive sectors.** These criteria (e.g. clean, resilient, circular, cybersecure) will strengthen demand for EU-made clean

<sup>11</sup> Annual Single Market and competitiveness Report (2025 edition link).

<sup>12</sup> Eurostat:

[https://ec.europa.eu/eurostat/databrowser/view/nrg\\_inf\\_epc\\_\\_custom\\_15272393/default/table?lang=en](https://ec.europa.eu/eurostat/databrowser/view/nrg_inf_epc__custom_15272393/default/table?lang=en)

<sup>13</sup> COM(2024) 62 final: This will require Member States to recognise capture projects as strategic in the context of the Net Zero Industry Act's implementation and oil and gas companies to deliver the 50 million tonnes of CO<sub>2</sub> storage capacity by 2030.

<sup>14</sup> Directive (EU) 2023/959

products, building on the experience of the Net Zero Industry Act for clean tech. This will widen the application of non-price criteria to the EU budget, other EU support programmes, as well as public and private procurement benefitting energy-intensive industries<sup>15</sup>.

**Beyond this short-term signal, the Commission will make a proposal to revise the Public Procurement Framework in 2026.** This will aim to make European preference criteria a structural feature of EU public procurement in strategic sectors. The revision will consolidate and clarify the interactions between public procurement provisions across different pieces of legislation, to simplify application by contracting authorities. All levels of administration, from national to local, should be able to use them. These criteria will also be extended to incentivise private procurement, through measures such as life cycle-based CO2 emission performance standards.

**Private procurement has the potential to shape demand significantly.** As is already the case in other regions of the world, and recommended in the Draghi report, the Commission will assess how to include requirements and non-price criteria in relevant product legislation, such as low-carbon steel or sustainable battery cells for cars and corporate fleets, as well as building codes. There must be a clear link between incentives for decarbonisation and circularity efforts by industry.

**Product labelling for industrial products, accompanied by the right incentives, is a powerful tool to speed-up the transition to decarbonised manufacturing** and ensure that the manufacturers can reap the “green premium” and return on their decarbonisation investments. Linking this label to public procurement, will encourage manufacturers to use it.

**The Industrial Decarbonisation Accelerator Act will develop a voluntary label on the carbon intensity content of industrial products,** based on a simple methodology with ETS data and in coherence with the ongoing revision of the CBAM methodology<sup>16</sup>. This should be the basis for further engagement with international work on measuring carbon intensity. In the interest of speed, the Commission will start with steel in 2025. This will require no additional reporting from industry. A label for cement will be created under the Construction Products Regulation<sup>17</sup>, and a standardisation request will shortly be lodged. Such labels will allow industrial producers to distinguish the carbon intensity of their industrial production and to benefit from targeted incentives, e.g. for clean steel. They could also be used by Member States to design tax incentives and other support schemes. In parallel, the Commission will continue working on developing comprehensive life-cycle assessments, building on the Industrial Decarbonisation Accelerator Act’s voluntary label where relevant. Labels will equally benefit consumers to see the carbon footprint of relevant products thanks to existing legislation (e.g. Ecodesign for Sustainable Products Regulation<sup>18</sup>, Construction product Regulation and sectoral legislation such as batteries or buildings).

In the longer term, strengthening these decarbonisation incentives also requires addressing the proliferation of different carbon accounting methodologies in the EU and internationally, which are a cause for confusion for EU companies leading the development of clean products. The Commission will work to simplify and harmonise carbon accounting methodologies and identify by Q4 2025 priority areas and possible avenues for simplification and harmonisation.

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<sup>15</sup> See Industrial Decarbonisation Facility.

<sup>16</sup> [Methodology explanation placeholder]

<sup>17</sup> Regulation (EU) 305/2011

<sup>18</sup> Regulation (EU) 2024/1781



### 3.2. Promote the uptake of renewable and low-carbon hydrogen

**Hydrogen has a central role to play in decarbonising our EU energy system, in particular in the hard to abate sectors where electrification is not yet a viable option.** A clear regulatory framework is essential. The Commission will therefore adopt as soon as possible the delegated act on low carbon hydrogen, to clarify the rules for producing low carbon hydrogen in a pragmatic way, providing certainty to investors.

To de-risk and accelerate the uptake of hydrogen production in the EU, the Commission will launch a third call under the Hydrogen Bank in Q3 2025 with a budget of EUR [XX] and encourage Member States to use the auctions-as-a-service platform provided by the Commission, for example by redirecting unused EU funds.

The pilot programme for corporate Power Purchase Agreements counter-guarantee<sup>19</sup> will also de-risk renewable hydrogen producers for the long-term purchase of new renewable electricity capacity. The Commission will closely work with the EIB to propose a dedicated financial guarantee.

Moreover, the launch of the Hydrogen Mechanism under the European Hydrogen Bank in Q2 2025 will mobilise and connect offtakers and suppliers, linking participants with financing and de-risking instruments to facilitate demand aggregation of offtakers, e.g. in the maritime and aviation sector.

To prepare the review of the delegated act on renewable fuels of non-biological origin, the Commission is launching a study to assess the effectiveness of the hydrogen framework and identify possible barriers to the upscaling of renewable hydrogen.

Flagship actions - Lead markets: boosting clean supply and demand	Timeline
Industrial Decarbonisation Accelerator Act (Q4 2025): <ul style="list-style-type: none"><li>• Speed-up permitting for decarbonisation investments</li><li>• Establish a low-carbon product label</li><li>• Apply EU preference in public and [private procurement] to ensure lead markets for low-carbon products</li><li>• Introduce minimum local content requirements</li></ul>	Q4 2025
Revise the Public Procurement Directive to mainstream the use of non-price criteria in EU funding calls	Q3-4 2026
Adopt delegated act on low carbon hydrogen, providing regulatory certainty to producers of low carbon hydrogen	Q1 2025
New KPI - Percentage of key components of clean tech products on the EU market, produced domestically in the EU <sup>20</sup> NZIA objective: 40% EU based production	

## 4. Public and private investments

**The clean transition of our economy will require major investments.** The EU needs to increase its annual investments in energy, industry and transport system by around EUR 480

<sup>19</sup> See section 2.1.

<sup>20</sup> Regulation (EU) 2024/1735 Art. 42

billion compared to the previous decade<sup>21</sup>. Mobilising and leveraging private capital is key. This requires long-term regulatory stability, public incentives for decarbonisation and effective policy coordination.

Building on the 38% of the EU budget<sup>22</sup> that contribute to climate-relevant measures supporting the European Green Deal in this period, the next Multi-annual Financial Framework (MFF) will also be a key enabler for the clean transition.<sup>23</sup> The planned **Competitiveness Fund** will offer strong support to industry for sustainable investment in the next MFF. It will focus on projects with European added value, such as clean tech, while also supporting industrial decarbonisation. The nationally allocated funding will provide significant further investments in the infrastructure and connectivity required to complete the Energy Union. The **Savings and Investment Union** will be adopted to unlock private investment. This will position Europe as the leading destination for investments in industrial decarbonisation and clean tech.

Today, **EU industry requires immediate access to capital. To provide short-term relief the Clean Industrial Deal will mobilise EUR [XX] to improve the business case for EU-made clean manufacturing**, including additional

XX billion EUR guarantees under the current MFF.

The Commission will act to (1) strengthen EU-level funding, (2) leverage private investment and (3) enhance clean State aid as well as other national support schemes.

#### 4.1. Strengthening EU level funding

**The Innovation Fund has proven to be a reliable tool for EU industries to finance industrial decarbonisation and clean tech manufacturing projects.** To increase its impact, additional financing options should be made available to scale up support for the Innovation Fund selected projects. The Commission will explore ways to facilitate this, including through enhanced synergies between existing funding instruments, notably cohesion funds. In parallel, the Commission will align funding criteria for the Innovation Fund and national financing to simplify State aid approval for Member States wanting to support projects with a STEP seal. This will clarify the process and give Member States an incentive to allocate more national resources.

**In addition, the Commission will propose a facility for industrial decarbonisation based on the ETS.** Prior to the revision of the ETS directive in 2026, the Commission will **pilot this facility with a [EUR X billion] auction** supporting industrial decarbonisation and electrification in 2025 using a combination of existing resources under the Innovation Fund and auctions-as-a-service.

The future decarbonisation facility will maximise emission reduction. It will support projects using the carbon emission reduction as a metric to provide technology-neutral support across sectors. It will complement the ETS price signal and help bridge the funding gap in both capital and operational expenditures.

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<sup>21</sup> SWD(2023) 68 final – Between 2021 and 2030.

<sup>22</sup> MFF and NextGenerationEU.

The Commission also invites Member States to make more use of grants- and auctions-as-a service as a proven model to pool EU and national resources in a harmonised and State aid approved competitive bidding process. Germany, Austria, Lithuania, and Spain have spearheaded efforts in this respect by unlocking additional funding for decarbonisation projects such as hydrogen.

More generally, the Commission will safeguard the EU's strategic interests by increasingly focusing relevant calls on the industrial decarbonisation needs, making greater use of resilience criteria in competitive calls or restricting the participation of third countries in sensitive research projects.

As research and innovation will be a key enabler of the Clean Industrial Deal, a dedicated **Horizon Europe pilot call** of ca. EUR X will also be launched under the 2026-2027 work programme to support fit -or-deployment projects.

#### 4.2. Leveraging private investment

**InvestEU, is the main EU-level tool to leverage private funding.** Operated in cooperation with the EIB group, international financial institutions and national promotional banks, it has mobilised over EUR 280 billion of additional funding into the EU economy.

The Commission is putting forward an amendment of the InvestEU Regulation to increase InvestEU's risk bearing capacity. This will simplify the use of resources from the European Fund for Strategic Investments and legacy financial instruments and facilitate equity support. This proposal will mobilise more than EUR [XX] billion additional financing and investment in key EU policy priorities, such as modernisation of industrial processes, manufacturing and deployment of clean tech, clean mobility solutions or waste reduction and recycling. Existing guarantee instruments under InvestEU will also be used in a Clean Tech Guarantee Facility, to target long-tenure investment loans. To further increase funding in areas covered by the Clean Industrial Deal, Member States are encouraged to contribute their resources, notably Cohesion and Recovery and Resilience Funds, to the InvestEU Member State compartment for investments.

**The Commission will also work with the EIB on new initiatives in favour of the sectors specifically targeted by the Clean Industrial Deal, to be supported as appropriate by InvestEU.** The EIB is one of the largest providers of climate funding and can play a significant role to secure additional private funding. As announced in the Competitiveness Compass, the Commission will work with the EIB group to deploy a TechEU investment programme to help bridge the financing gap to support disruptive innovation. This will include a **new initiative to support clean-tech start-ups and scale-ups** mobilising at least EUR [X] billion over 5 years. Targeted energy intensive industrial sectors will benefit from an EIB pilot programme for lending conditioned by decarbonisation indicators. The EIB will develop a one-stop-shop for Important Projects of Common European Interest (IPCEI) with dedicated EIB funding solutions. The EIB will develop a Cleantech Guarantee Facility including the use of existing guarantee instruments under InvestEU, to target in particular long-tenure investment loans. The EIB will also pilot an advanced payment guarantee product, a trade finance instrument for manufacturers of cleantech innovative equipment.

#### 4.3. Clean Industry State aid Framework and other support and facilitation

**National level support, including State aid support and tax incentives, plays a crucial role in decarbonisation efforts by providing financial backing and reducing barriers to investment.** These measures not only strengthen the economic viability of sustainable projects but also leverage private sector participation.

**The new Clean Industry State Aid Framework will enable necessary and proportionate State aid that crowds in private investment.** It will do so by providing Member States with a longer planning horizon of 5 years and businesses with more investment predictability for projects contributing to the objectives of the Clean Industrial Deal.

**Simplified rules will allow quick approval** of State aid measures for decarbonisation and clean tech projects, notably where they have undergone a European selection process, while avoiding undue competition distortions in the Single Market. The proposal will also introduce "off-the-shelf" options for Member States to easily demonstrate compatibility. The new Framework will allow a wider use of simplified methods to set aid amounts instead of complex individual assessments, building on the experience of the temporary transition and crisis framework. It will also allow separate support schemes for specific technologies such as wind and solar, and further facilitate support to flexibility measures and capacity mechanisms accelerating the decarbonisation of the energy system.

**The Framework will also allow support for manufacturing and scale-up of clean-tech products,** such as batteries, by updating the rules for investments in net-zero equipment manufacturing capacity. It will notably consider how to bridge the funding gap of individual industrial projects based on clear criteria linked to resilience and strategic autonomy. In addition, the Commission will provide informal guidance to companies on antitrust compatibility of cooperation projects contributing to the achievement of EU priorities.

**Beyond the new State aid framework, the simplification of existing State aid rules is essential.** The upcoming review of the General Block Exemption Regulation will significantly reduce the bureaucratic burden for both undertakings and Member States and facilitate necessary support for industry, while preserving the integrity of the Single Market. In parallel, the Commission is evaluating the Guarantee Notice, to assess if it is still a sufficiently clear and predictable framework for granting state guarantees. State guarantees can be an effective support instrument that leverages private financing while being a lesser burden on public resources than support through direct grants.

**The Commission will also work with the Member States to speed-up the design of new IPCEI.** It will offer a support hub to accelerate getting IPCEI projects off the ground. The Commission will also work with the EIB to develop a **one-stop shop** to provide grant application and financial structuring advice. Additionally, the Commission will assess targeted changes to the IPCEI definition, to strengthen the efficiency of the tool to support industrial decarbonisation and the scale up of clean tech manufacturing in the EU.

Beyond the State aid rules, the Commission also stands ready to provide guidance to companies on **antitrust compatibility of cooperation projects contributing to the achievement of EU priorities** in particular those related to innovation, decarbonisation and economic security in the EU. Further, the guidelines for assessing mergers will be revised to ensure that the impact of mergers on the affordability of sustainable products and on clean innovation, or on creating efficiencies that bring sustainable benefits, but also on innovation, resilience, and the

investment intensity of competition in certain strategic sectors are better integrated in the competition analysis.

**Tax policies are a key incentive to reach the objectives of the Clean Industrial Deal.** They should not give fossil fuels an advantage over clean energy. **The Commission will recommend to Member States that their corporate tax systems support a clean business case.** Measures could include shorter depreciation periods for clean technology assets, allowing businesses to quickly write off costs and benefit from tax incentives that offset high initial investments and the use of tax credits for businesses in strategic sectors for the clean transition, to make it more financially attractive to invest in decarbonised practices. To the extent such measures involve State aid, the new State aid framework will integrate such instruments in its compatibility rules. These tax related measures will be paired with further **actions to scale down and phase out fossil fuel subsidies.** To facilitate growth and investment in new innovative companies the Commission will propose a 28th legal regime, which will simplify applicable rules.

Flagship actions – Public and private investment	Timeline
Targeted amendment of the European Regional development Fund	Q1 2025
Set-up an Industrial Decarbonisation Facility	Q2 2026
Launch a pilot auction under the Innovation Fund	2025
Increase InvestEU's risk bearing capacity	Q1 2025
EIB vehicle on scale-ups and IPCEI design support hub	2025
Adopt a new Clean Industrial State aid framework	Q2 2025
Recommend Member States to adopt tax incentives to support the Clean Industrial Deal	Q2 2025
Future KPI: Total amount committed under the Industrial Decarbonisation Facility	

## 5. Powering the circular economy: a secure access to materials and resources

**Europe should be more strategic about procuring critical raw materials to drastically reduce our exposure to unreliable suppliers and prevent supply disruptions. More than before, circularity should be a driver for innovation.**

By placing circularity at the core of our decarbonisation strategy, the EU not only improves the affordability and accessibility of essential materials but also reduces our dependencies as materials are recovered, reused, recycled, and kept within the economy for longer. The European remanufacturing market's circular potential is projected to grow from its current value of EUR 31 billion to EUR 100 billion by 2030, creating 500,000 new jobs. This will make Europe's industrial production more sustainable, speed-up decarbonisation and enhance resource security.

### 5.1. Fast implementation of the Critical Raw Materials Act

To secure access to critical raw materials essential to our twin transitions and for which the EU is heavily dependent on a limited number of third country suppliers, the Commission will **prioritise the implementation of the Critical Raw Materials Act**. This will include the recognition of a first list of Strategic Projects in March 2025 to ensure diversification of supplies across the entire value chain as well as facilitating access to public and private financial support for these projects.

Building on its experience with AggregateEU, the Commission will set up a **demand aggregation and matchmaking mechanism for critical raw materials**. As a second step, complementary to the Critical Raw Materials Act and in line with the recommendations of the Draghi report, the Commission will set up a dedicated **EU Critical Raw Material Centre** to jointly purchase raw materials on behalf of interested companies. Other tasks could relate to coordinating strategic stockpiles, supply chain monitoring, designing financial products to invest in upstream supply in the EU and third countries.

### 5.2. Circular Economy

**EU industry is a front runner in circularity. But these efforts are currently hampered by the absence of scale and a single market for waste, secondary raw materials and reusable materials.** To address this gap, the Commission will continue to engage with stakeholders to identify actions and measures that would allow transformational steps towards circularity. The EU also needs to make sure that products containing valuable and scarce materials are (re-)used efficiently and for as long as possible before they become waste, including through the full roll-out of Ecodesign requirements on important product groups.

The example of fertilisers illustrates the potential of the Clean Industrial Deal across sectors. The domestic production of fertilisers, including of low-carbon fertilisers and fertilisers from recycled nutrients, reduces dependencies on fertiliser imports and emissions, promotes circular business models, and should reduce input process for farmers.

**The Commission will adopt a Circular Economy Act in 2026**, which will accelerate the circular transition, building on our single market. The Act will enable the free movement of circular products, secondary raw materials and waste, foster a higher supply of high quality recyclates and stimulate demand for secondary materials and circular products while bringing down feedstock costs.

One of the measures in the Act is a revision of existing rules on e-waste, to ensure that they are simpler, fit-for-purpose and recover the critical raw materials they contain. It will harmonise definitions of “end of waste” to facilitate the transition from waste to valuable secondary raw materials, simplify, digitalise and expand extended producer responsibility, and boost demand. It will provide for mandatory digitalisation of demolition permits and pre-demolition audits. To move away from fossil materials, it is vital to mandate the use of new raw material sources

like recycled and bio-based materials to substitute, for example, virgin fossil materials in plastics.

To increase the recycling capacity in the EU and achieve the 25% recycling target as set out in the Critical Raw Materials Act, the Circular Economy Act will propose targeted, reciprocal **limits on the export of critical raw materials waste and measures to incentivise diversion from landfill** towards re-use and recycling through more effective separate collection. For instance, reciprocal measures will limit the export of critical raw materials waste to third countries if such countries have themselves put in place export restriction measures on critical raw material. Export fees could also be considered, which could then be used to finance investment in recycling capacity.

We must not only dismantle regulatory barriers, but also facilitate the significant scaling up of investments to supply the secondary raw materials that industrial manufacturing needs. Cooperation between neighbouring Member States and interested economic actors will be fostered through **Trans-Regional Circularity Hubs**. The Hubs will identify strategic projects to promote smart specialisation and economies of scale for recycling. They will be based on proposals by groups of Member States and/or industrial actors. They will build on the experience of Strategic Projects under the Critical Raw Materials Act and apply similar approaches to the technical and biological materials on which our industries depend. Furthermore, the Commission will actively assist Member States in the design of a potential new IPCEI on circular advanced materials for clean technologies.

In addition, the Commission will launch a fact-finding exercise to gather input from market participants on how European companies currently procure and recycle the most important raw materials assess whether more cooperation between industry players is needed. This could be supported by providing guidance on how cooperation in the recycling of raw materials can be most effective in line with EU competition rules.

Furthermore, the Commission will review the rules on the **second-hand scheme contained in the VAT Directive**<sup>24</sup>, as part of a green VAT initiative to address the issue of embedded VAT in second-hand products. Finally, to ensure an effective circular transition, work will have to be done in close partnership with all stakeholders. To this end the Commission will launch a Clean Industrial Dialogue on Circularity to gather input for the Circular Economy Act and identify areas where further efforts are needed.

Flagship actions – Powering the circular economy: a secure access to materials and resources	Timeline
First list of Strategic Projects under the Critical Raw Materials Act	Q1 2025
Create an EU Critical Raw Materials Centre for joint purchases and management of strategic stockpiles	Q4 2026

<sup>24</sup> Council Directive 2006/112/EC.

Adopt a Circular Economy Act to build a single market for waste and reusable materials,	Q4 2026
Green VAT initiative	2026
Trans-Regional Circularity Hubs	Q4 2025
KPI: Circular material use rate <sup>25</sup> . 2030 target <sup>26</sup> : 24% (current rate: 11.8%)	

## 6. Global markets and international partnerships

**Achieving the objectives of the new Clean Industrial Deal is closely linked to our ability to act internationally. The EU cannot realise its clean industrialisation objectives without partnerships on the global stage.** Many of the critical raw materials that are essential for the green transition need to be sourced from outside the EU. At the same time, moving towards sustainable and diversified industrial value chains is also an interest shared by our partners. Our economic success also depends on open, rules-based trade and access to third markets for goods and capital.

Today, the world's major economies are vying for access to markets, raw materials, new technologies and global trade routes in the race to climate neutrality and to develop strategic technologies first. Furthermore, industry faces unfair global competition notably due to the export of domestic overcapacities from other countries at highly discounted prices. We have entered an era of global geoeconomic competition with the necessity to protect the global level playing field and ensure that the EU market does not serve as a backfilling export destination for excess global capacity.

### 6.1. Clean Trade and Investment Partnerships

According to the International Energy Agency, the global market for clean energy technology will be worth USD 2 trillion in 2035. To achieve climate neutrality in a competitive manner, it is essential that European companies, investors and workers secure the largest possible share of this opportunity.

**The EU's vast network of trade agreements ensures that European companies have better access to third markets and essential inputs.** It is therefore crucial that the EU continues to **sign, conclude and fully implement pending Free Trade Agreements (FTA) and takes forward ongoing negotiations for new FTAs.** Clean Trade and Investment Partnerships (CTIPs), will complement these legally binding agreements through a faster, more flexible, and more targeted approach, tailored to the concrete business interests of the EU and its trade partners in clean tech sectors. The CTIPs will therefore be designed to better align the EU's external action with the EU's industrial policy objectives considering businesses' opportunities

<sup>25</sup> Annual Single Market and competitiveness Report (2025 edition link).

<sup>26</sup> COM(2020) 98 final – A new Circular Economy Action Plan.



and needs. Their focus will be on better managing strategic dependencies and securing the EU's position in crucial global value chains, by diversifying our supply chains and securing better access to raw materials, clean energy and clean tech. They will also foster cooperation on energy technology and policies for the clean transition. In this sense, catering to EU and partners' businesses' needs and interests will be crucial to design effective CTIPs and ensuring proper offtake of the trade and investment opportunities created by them.

The CTIPs will bring together rules, regulatory cooperation as well as financial support to develop strategic clean value chains with partners. Firstly, rules will ensure a conducive environment for clean investment and business opportunities for EU companies on an equal footing in foreign markets. Secondly, regulatory cooperation will support partners in deploying in particular clean tech, circularity, decarbonisation standards as well as carbon pricing. Thirdly, investments will be mobilised by identifying concrete projects combining private and public finance, including Global Gateway funding via the Team Europe approach, bringing together development and export finance. The result will be credible and attractive partnerships promoting clean tech investments that ultimately also speed up the global transition. The Commission aims to launch the first CTIP with [country placeholder] in March.

Furthermore, under the new Pact for the Mediterranean, an ambitious Trans-Mediterranean Energy and Clean Tech Cooperation initiative will stimulate large scale public and private investments in renewable energy. Furthermore, our diplomacy will continue to support partner countries in engaging in the green transition in the context of ambitious climate policies and Nationally Determined Contributions under the Paris Agreement.

The EU should adopt a strategic approach to energy cooperation together with the Member States in third countries, focusing on three key areas: diplomacy, technical assistance and economics. The Commission will create Clean Industrial Deal Energy Hubs at country level, involving Member States and clean energy businesses.

## **6.2. Improving the Carbon Border Adjustment Mechanism**

**The Carbon Border Adjustment Mechanism (CBAM) ensures that the EU's industry emissions abatement efforts are not undermined by carbon intensive imports of goods produced outside of the EU and incentivises decarbonisation and carbon pricing globally.** Yet, data collected to date indicate that a limited number of importers account for almost 99% of greenhouse gas emissions embedded in imported goods. The Commission is proposing to substantially simplify CBAM, reducing administrative burden on industries and their supply chains while continuing to incentivise global carbon pricing. This is a first but necessary step to making the CBAM more effective.

In the second half of 2025, the Commission will also present a comprehensive CBAM review report. It will assess the extension of CBAM to other EU ETS sectors and downstream products, as well as indirect emissions. The report will set out a strategy to tackle possible circumvention risks. At this occasion, the Commission will also examine how to help exporters of CBAM products. This review will be followed by a legislative proposal in first half 2026.

In parallel, through technical assistance and regulatory cooperation the EU can further support partner countries' decarbonisation efforts. Through the recently launched International Carbon Markets and Carbon Pricing Diplomacy Task Force, it will also promote the development of

carbon pricing and carbon markets worldwide, by supporting partner countries to develop effective carbon pricing policies and robust approaches to international carbon markets.

### 6.3. Promoting and protecting EU industry

**The EU needs to remain an attractive place to do business**, while ensuring that foreign investments contribute to economic growth and are in line with the EU's policy on economic security. The Commission will explore, in close consultation with industry stakeholders and Member States, how to ensure that foreign investments in the EU better contribute to the long-term competitiveness of EU industry, its technological edge and economic resilience, as well as the creation of quality jobs in the EU. For instance, for projects that involve foreign investment, Member States could consider conditions such as ownership of the equipment, EU sourced inputs, EU-based staff recruitment, the need for joint ventures or intellectual property transfers.

With the ongoing review of the EU FDI Screening Regulation<sup>27</sup>, the Council and the European Parliament have an opportunity to improve the EU investment screening by reducing the differences between national screening mechanisms and aligning their approaches and policies therefore minimising the risk of "forum shopping".

**The Commission will adopt guidelines by January 2026 on key concepts underpinning the Foreign Subsidies Regulation**, such as how the Commission will assess distortive effects of foreign subsidies. The guidelines will also clarify in which circumstances the Commission may decide to review mergers under foreign subsidy rules that do not meet thresholds but pose a risk to the level playing field in the single market.

**The Commission will continue to make fast and efficient use of Trade Defence Instruments (TDIs), such as anti-dumping or anti-subsidy duties where necessary.** To protect our industries from unfair competition and ensure that our market does not serve as an export destination for state-induced excess global capacity we will sharpen existing Trade Defence Instruments, including through shortening investigation timelines or making greater use of ex officio procedures. The Commission will also reflect, together with Member States and stakeholders, if further instruments are necessary to complete and reform the TDI toolbox. In addition, the Commission will consider addressing unfair trading practices by raising applied tariffs within bound levels or use existing exemptions e.g. for environmental protection.

As protectionist measures are multiplying across the globe, there is a risk that **global overcapacities** will be redirected to the EU market. The Commission will address overcapacities by intensifying our international and multilateral cooperation and focusing on detecting and addressing root causes of non-market-oriented measures, including subsidies resulting in imbalances in key industries and trade patterns for critical goods and technologies. The EU will seek closer engagement within the G7 in this regard and exchange information to make sure autonomous responses and collective actions are well coordinated and effective.

Flagship actions – Global markets and international partnerships	Timeline
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<sup>27</sup> Regulation (EU) 2019/452

Launch negotiations for the first Clean Trade and Investment Partnership to address dependencies and crucial global value chains	Q1 2025
Trans-mediterranean Energy and Clean tech cooperation initiative	Q4 2025
Simplification of the Carbon Border Adjustment Mechanism	Q1 2025
Comprehensive CBAM review assessing the feasibility of extending to downstream sectors and indirect -boemissions and support to exporters, closing loopholes	Q3 2025
Legislative proposal on an extension of CBAM	Q1 2026
Guidelines on Foreign Subsidies Regulation	Q1 2026

## 7. Skills and quality jobs for social fairness and a just transition

**Every person, community, and business should benefit from the clean transition.** The Clean Industrial Deal therefore commits to a just transition that delivers quality jobs and empowers people, building on their skills, while promoting social cohesion and equity across all regions. Our industry needs a skilled workforce and must offer quality jobs to attract top talent. Keeping workers and local communities at the centre of the industrial transformation, harnessing talents and further building up needed skills is essential for a successful clean transition. At the same time, the clean and digital transition also means shifts in the workforce and new requirements for skills.

### 7.1. Skills and quality jobs

**Industry needs better access to skills. The Commission will lay out a Union of Skills** as an overarching skills strategy to support the development of a more resilient and adaptable education, training and skills systems to enhance the EU's competitiveness and preparedness.

It will also provide the framework for sectoral skills reinforcement in strategic industries linked to the Clean Industrial Deal, with a reinforced support by up to EUR [XX] million from Erasmus+.

The Union of Skills will enhance our skills intelligence and focus on, among others, on investment, adult and lifelong learning, vocational education and training, skills retention and recognition as well as attracting and integrating qualified talents from third countries, including through the future EU Talent Pool. To tackle the challenges of skills recognition, the Commission will consider further action for streamlined and simplified processes as well as digitalisation tools. A **Skills Portability Initiative** will help to ensure a skill acquired in one country is recognised in another.

Above all we need our industry to remain an attractive workplace. The **Quality Jobs Roadmap**, to be prepared together with social partners, will support Member States and industry in providing decent working conditions, high standards for health and safety, access

to training, and collective bargaining, with a view to attracting talent and contributing to the competitiveness of European industries.

## 7.2. Supporting workers in the transition

**To support workers in transitions**, and inform the work in this area, **the Commission will create a European Fair Transition Observatory**. It will develop standardised indicators and facilitate data sharing to measure outcomes related to workforce reskilling, investment needs, as well as ensure a transparent dialogue with social partners, regional and local authorities, civil society and other stakeholders on just transition aspects. The Commission will engage in improving the current delivery of the Just Transition Fund (JTF) by streamlining funding access, enhance coordination with regional authorities, and ensure faster disbursement to impacted communities, while learning the lessons and establish best practices to support the next MFF.

Greater importance will be placed on labour and social standards to ensure that the transition is fair and equitable for all. The Commission's forthcoming evaluation of the legislative framework on public procurement will therefore include consideration of possible social clauses, enhancing social responsibility and sustainability in procurement.

Also, as part of the review of the General Block Exemption Regulation, the Commission will assess if and how State aid rules can be updated to provide better incentives for industry to invest in upskilling, reskilling and recruitment of workers for a just transition. The Commission will assess if the use of **training and skills conditionalities** for public funding supporting the industrial transition can be increased.

## 7.3. Social leasing for clean products

To ensure that all Europeans benefit from the clean transition, without adverse distributional effects and to help stimulate demand for clean products, the Commission will develop a **Guidance to Member States on social leasing for electric vehicles, heat pumps, and other clean products**, providing financial assistance to citizens to access these clean products, eligible also in the context of the Social Climate Fund.

Flagship actions – Skills and quality jobs for social fairness	Timeline
Review of State aid GBER rules for social enterprises and recruitment of disadvantaged workers	2027
Put in place a European Fair Transition Observatory	Q1 2026
Adopt guidance on social leasing for clean products	QX 2025

new KPI: Reducing the number of occupations requiring specific skills or knowledge for the green transition where at least five Member States reported a shortage<sup>28</sup>

Baseline: in 2022, [XX] occupations requiring specific skills or knowledge for the green transition were reported to be in shortage (in at least 5 Member States)

## 8. Implementing the Clean Industrial Deal across sectors

The **Clean Industrial Deal** will serve as a framework for engaging in a dialogue with industries to develop sectoral transition pathways. These will enable informed investment decisions and facilitate the mobilisation of more capital towards the transition, ultimately accelerating progress towards a cleaner and more competitive industrial future.

To tailor action to the specific needs of individual sectors, work is ongoing on several sector specific plans in 2025:

The **Industrial Action Plan for an Automotive Sector** will be adopted on 5 March, building on the ongoing strategic dialogue. The action plan will address the needs of the automotive value chain, with a strong focus on innovation in future technologies and capabilities.

A **steel and metals action plan**, based on the Strategic Dialogue that will be launched on March [XX], will propose concrete actions for both ferrous and non-ferrous metals industries, as steel and metals – the backbone of EU industry for centuries – are essential for the clean and digital transitions.

A **Chemicals Industry Package**, set for adoption in late 2025, will recognise the strategic role of the chemicals sector as “industry of industries” and of critical molecules. It will propose targeted initiatives to enhance the sector’s competitiveness, modernisation as well as support production and innovation in Europe.

A **Sustainable Transport Investment Plan** will outline short-term measures to prioritise support to specific renewable and low-carbon fuels for aviation and waterborne transport, on which many energy-intensive industrial sectors rely. New rules facilitating aid for a shift towards sustainable land transport modes will enable the rail sector to embrace the clean and digital transition.

The Commission will also propose a **Bioeconomy Strategy**, to improve resource efficiency and to tap the significant growth potential of bio-based materials substituting fossil-based materials. This can also further reduce dependencies on imported raw materials. The new bioeconomy sectoral plan will lay down priorities for manufacturing and using biomaterials, and for retaining them as long as possible in the economy.

## 9. Conclusion

Putting decarbonisation and circularity at the heart of our economic policy is the only way for the EU to keep up with resource rich competitors. The Clean Industrial Deal is the strategy to

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<sup>28</sup> As reported annually by the \* European Labour Authority, based on data from EURES National Coordination Offices. Skills and knowledge requirements align with the ESCO taxonomy on skills for the green transition, with examples analysed using the green intensity index for European Skills Competences and Occupations (ESCO).

do this. But a strategy is only as good as its effective implementation. This requires robust measuring, monitoring and dialogue. The Commission will closely monitor progress in its Annual Single Market Competitiveness Report towards decarbonisation and competitiveness objectives, gradually adding new KPIs as set out in this document.

To ensure the effective implementation of the Clean Industrial Deal, cooperation and alignment with the Member States are essential. The Commission will work together with the co-legislators to ensure effective implementation of the actions outlines in this communication, in a regular dialogue with Council and the European Parliament. The initial focus of the discussions will be the identification of urgent decarbonisation priorities.

We invite industry to exercise bottom-up leadership and targeted alignment to deliver tangible results that could be scalable at European level.

Together, the actions of this joint roadmap for decarbonisation and competitiveness for European industry will ensure that there is a sustainable future for manufacturing in Europe – economically, environmentally and socially.

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