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European Trends and Italian Policies

European Trend

Industrial Acceleration Act

KEY ISSUES

EU industrial value chains are vulnerable due to dependence on non-EU countries for key materials, components, and technological expertise.

Slow, complex permitting and financing barriers prevent industrial decarbonisation technologies from being deployed and scaled efficiently.

Low demand for low-carbon products and high production costs hinder market development and slow decarbonisation of energy-intensive industries.

Industrial Acceleration Act

The **Industrial Accelerator Act (IAA)** is a central element of the European strategy to integrate climate and industrial competitiveness objectives into a coherent regulatory framework, under the umbrella of **the Clean Industrial Deal**



LEAD MARKETS

Strengthen the demand for low-emission industrial products manufactured in the European Union by introducing common criteria for environmental sustainability, resilience, circularity and cybersecurity, especially in public procurement and in sectors such as construction and automotive.



PERMITTING

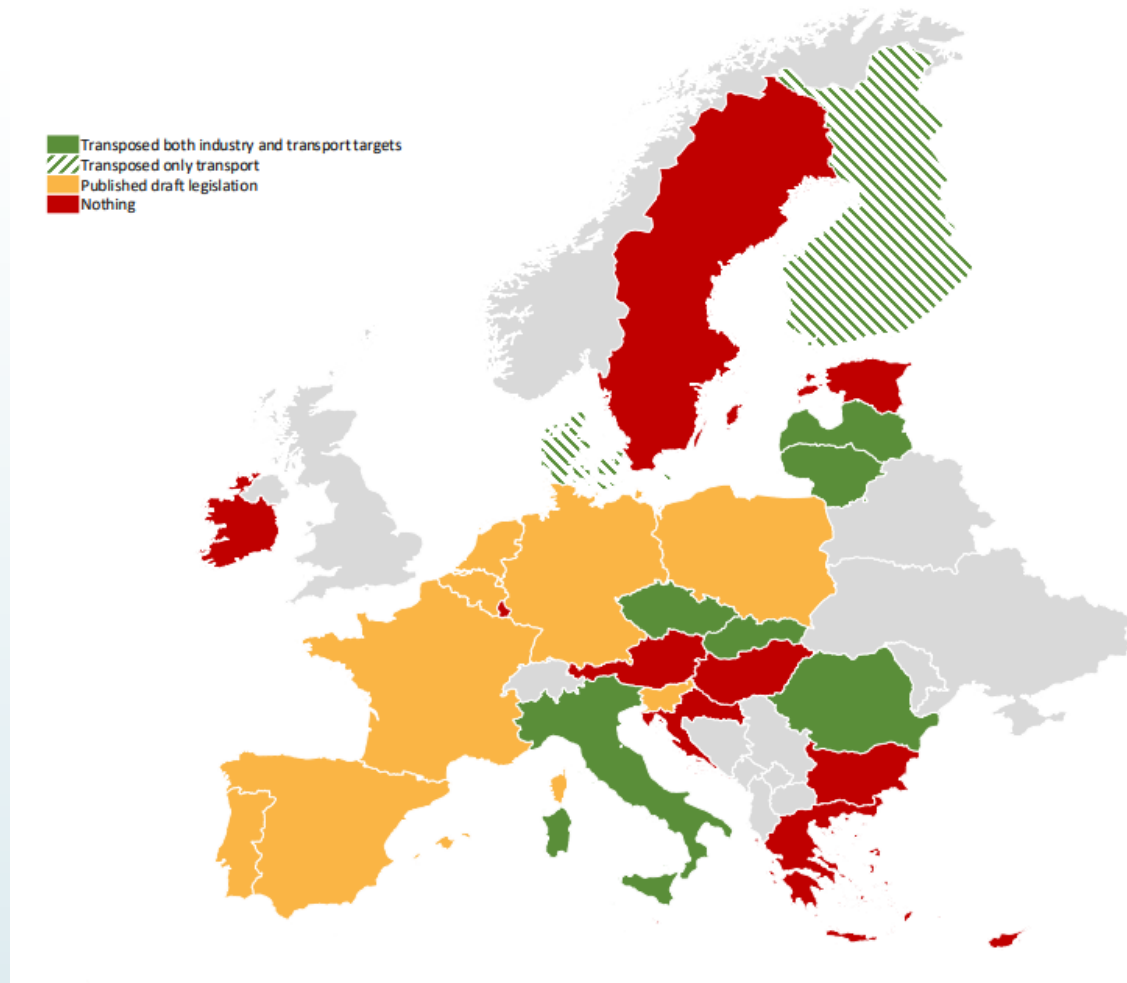
Simplify and speed up permitting processes for strategic industrial and infrastructure projects, particularly in energy-intensive sectors.



LABELLING

To provide consumers with information on the carbon intensity of industrial products, initially applicable to steel and later to cement.

Implementation of RFNBO RED III targets in Member States



- *Only 6 out of 27 Member States have transposed the RFNBO targets of the RED III into law for both industrial and transport use (RO, CZ, SK, LT, IT, LV)*
- *A further 2 countries have transposed only the elements related to the use of RFNBOs in the transport sector (FI + DK)*

Hydrogen backbone



The European Hydrogen Backbone (EHB) infrastructure enables a cost-competitive pathway to net-zero emissions while fostering industrial competitiveness. Hydrogen pipelines, import terminals and storages can speed up hydrogen supply and demand.

Of the 58,000km EU network in 2040 approximately 60% will come from repurposed natural gas pipelines.

Repurposing pipelines can reduce costs by around 80% compared to constructing a new pipeline.

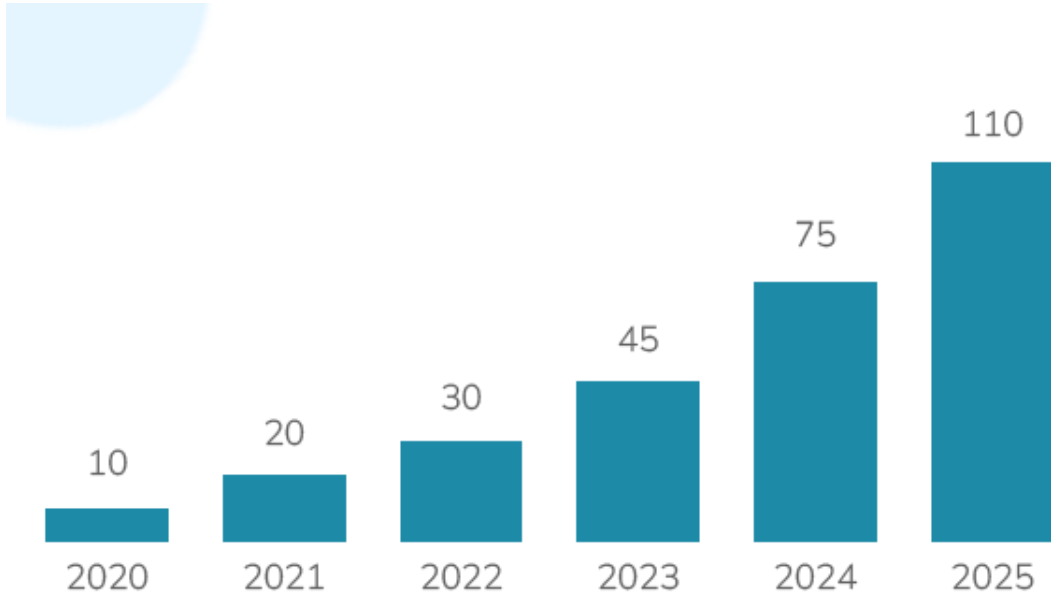
Global investments and European focus



Global investments

Global Hydrogen Compass 2025 – Hydrogen Council

Global cumulative committed (FID+) investment in clean hydrogen projects by 2030, \$ billion



China



33 billion \$

North America



23 billion \$

Europe



19 billion \$

India



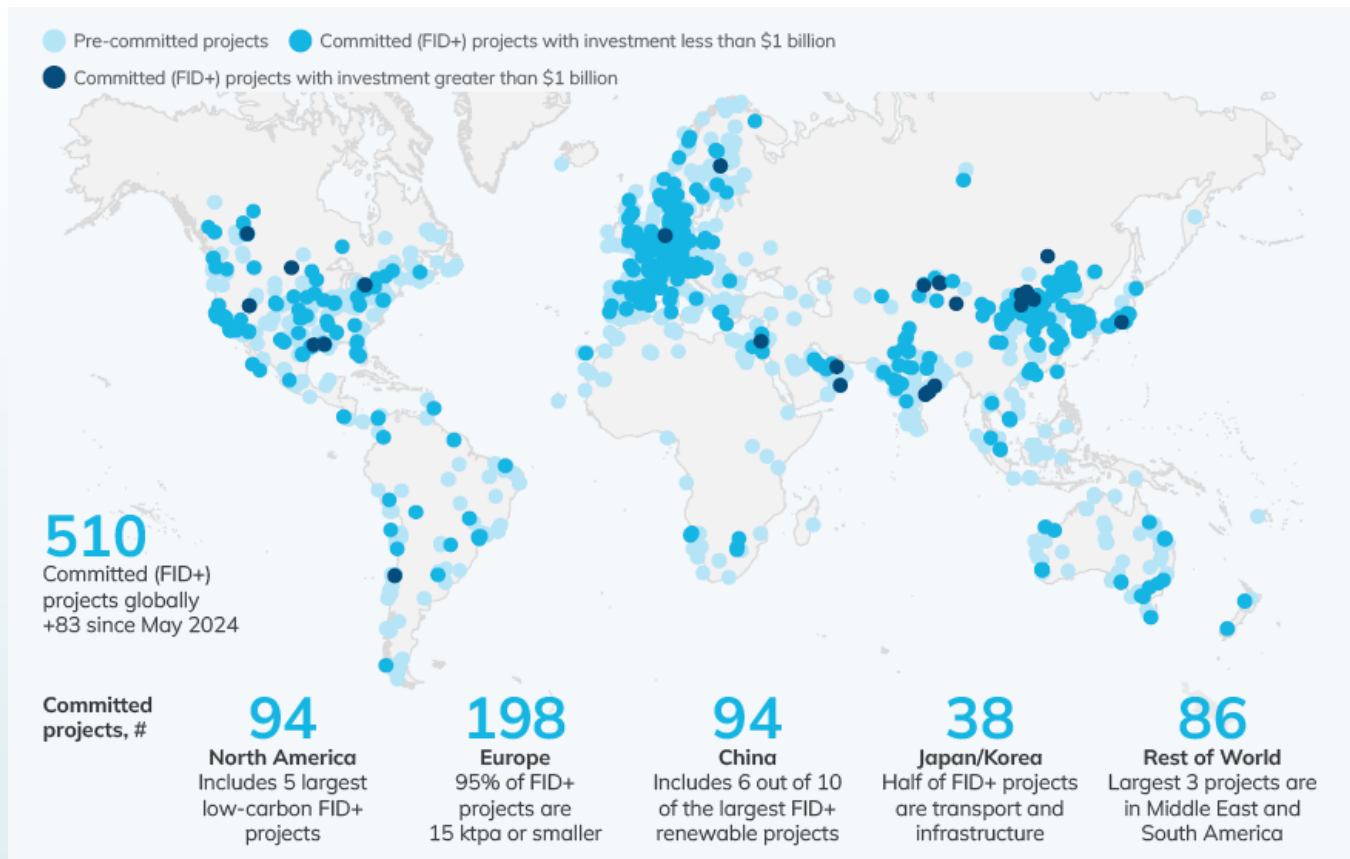
14 billion \$



Global investments

Global Hydrogen Compass 2025 – Hydrogen Council

Global clean hydrogen projects by project status



- **510 projects**
- **Europe has the highest number of projects with a date of entry into market by 2030**
- **70% of projects are renewable hydrogen, of which just under half are in Europe.**
- **Europe leads in quantity but Chinese renewable projects are ten times larger than European ones**

Italian Policy Framework



Italian Hydrogen Strategic Framework

2021-2026

National Recovery and Resilience Plan PNRR

3,64 billion euros along the value chain

2024

Integrated Energy and Climate Plan

251.000 tons of hydrogen RFNBO by 2030

November 26, 2024

Hydrogen strategy

Decarbonisation of end-uses, Energy security and low-carbon hydrogen production

January, 2026

RED III

42% rfnbo industry
1% rfnbo transport

2026?

Tariff Decree

Renewable hydrogen auction (bio and non-bio)

Updating of safety and authorization regulations

National Funded Projects

Hydrogen valleys



Hydrogen Refuelling Stations

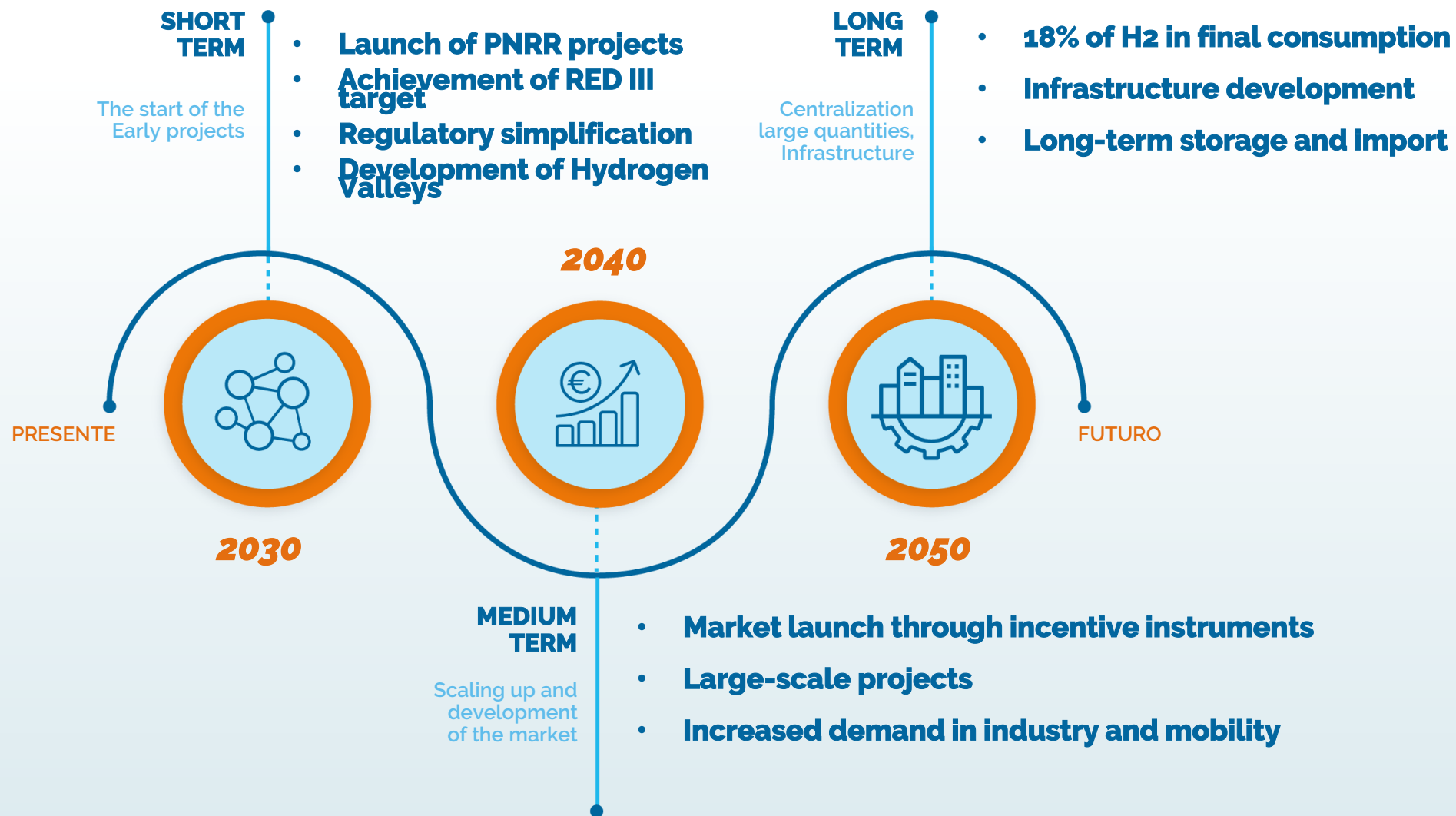


Important Projects of Common European Interest



The national hydrogen strategy

The stages of the strategy

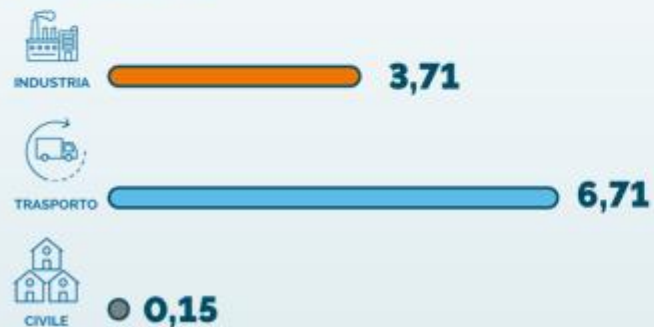


High diffusion scenario (30% imports) by 2050:

Hydrogen consumption (Mtep)



Consumi finali



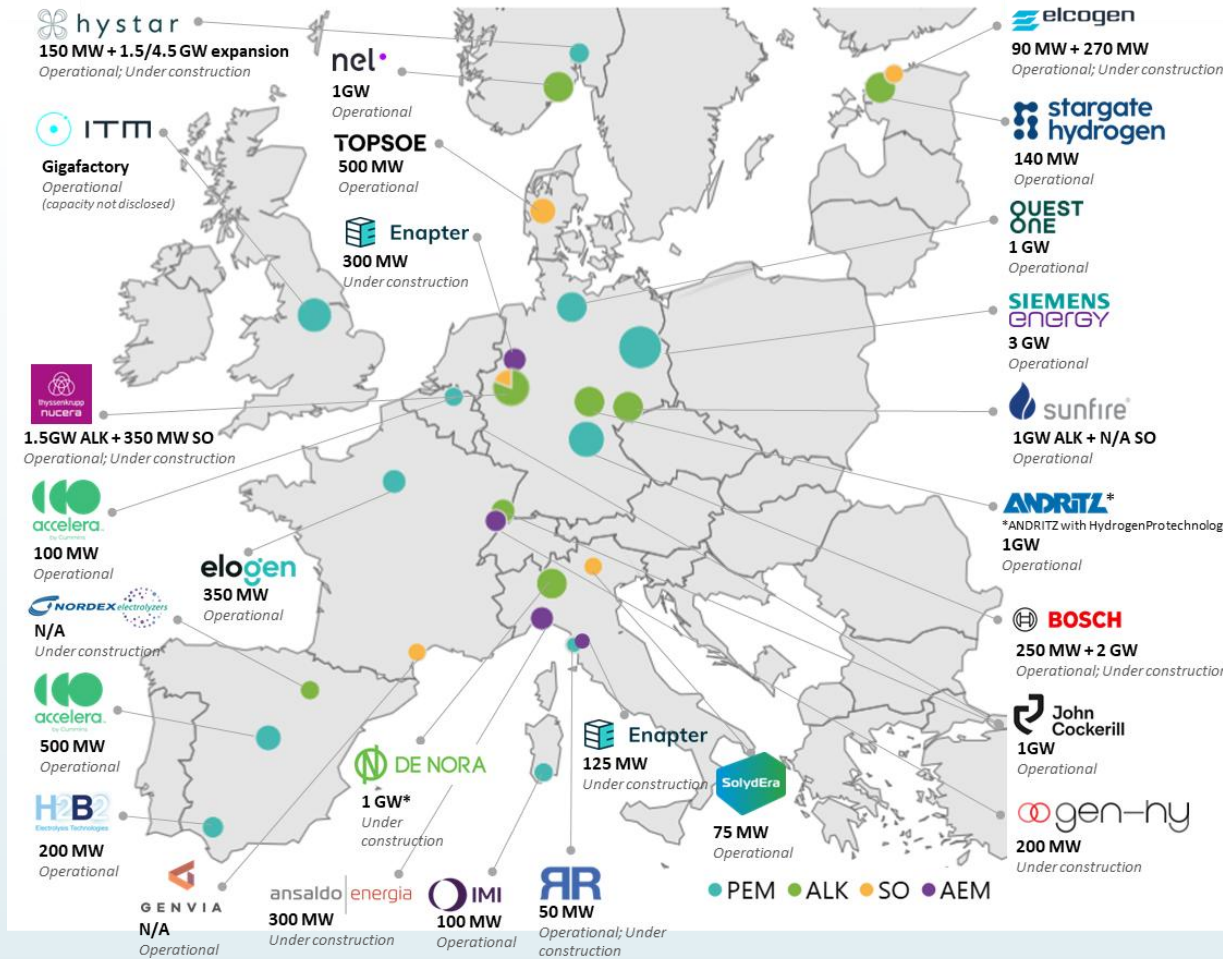
Investments



% of h2 consumption in end use sectors



European/Italian manufacturing capacity



In Italy

The current operational production is about ~275 MW/year.

In Italy

We cover all technologies: ALK, PEM, SOEC, and AEM

In Italy

More than 2.5GW/year of electrolyser production capacity is under construction

Source- Hydrogen Europe - Sites below 50MW not shown, latest update August 2025



Necessary Regulations and Policies

PRIORITIES FOR ACTION

1. **OPEX INCENTIVE:** It is necessary to provide support for operating costs to bridge the cost gap with fossil alternatives.
2. **STIMULATING DEMAND IN INDUSTRY AND MOBILITY** – It is necessary to support companies that represent the demand for hydrogen and derivatives with appropriate tools. (Support for the replacement of fleets, the replacement of industrial equipment, calls to support the creation of ecosystems and the transition of industrial processes..)
3. **REDUCING THE COST OF ELECTRICITY:** Tools to reduce the impact of the cost of electricity on the cost of final hydrogen.
4. **CERTIFICATION:** Define the rules for the certification of renewable and low-carbon hydrogen.
5. **MADE IN EU MANUFACTURING.** Enhancement of the national and European supply chain of technologies and products, support for the creation/expansion of production centers in line with the NZIA.
6. **R&D:** Research and development fundamental for national competitiveness

Grazie per l'attenzione



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