

Renewable hydrogen: what way forward?

Agenda

This meeting is under Chatham House Rules

Date: 03/10/2023

Time: 14:30 CET – 16:30 CET

Venue: Rue Archimède 61, 1000 Brussels, Belgium

The current European hydrogen regulatory framework sends a clear policy signal in favour of renewable hydrogen. This is evident in the recent provisional agreement of RED III, which mandates industries to procure at least 42% of their hydrogen from renewable fuels of non-biological origin (RFNBOS) by 2030. This target is part of a comprehensive architecture that influences the entire value chain of the EU hydrogen ecosystem. It encompasses aspects such as manufacturing of electrolyzers and sourcing of raw materials under the Green Deal Industrial Plan, as well as considerations of operating costs under the Electricity Market Design. This complex framework aims to pave the way for a renewable hydrogen economy that supports the broader decarbonization objectives of the EU.

In the last consultation organised by ERCST, stakeholders identified a number of barriers to the uptake of renewable hydrogen. On the cost competitiveness side, renewable hydrogen in the EU still faces challenges in competing with hydrogen produced from fossil fuels, as well as with competing schemes overseas. This is due to performance factors and the availability of renewable energy coherent with the industry's baseload needs. These factors hinder the healthy and market-driven development of renewable hydrogen capacity, dampening investors' appetite. On the demand side, concerns related to infrastructure, costs, and flexibility further hinder the take-off of the EU renewable hydrogen market.

This roundtable aims to leverage the insights of invited speakers to explore strategies required to bridge the gap between the current and targeted levels of renewable hydrogen production and consumption in the EU. Key topics to be addressed include the importance of flexibility, technological neutrality, hedging and de-risking mechanisms, green standards, sectoral prioritisation, and state-aid financing.

ERCST

European Roundtable on
Climate Change and
Sustainable Transition

- 14:30 **Welcome and introduction**
- Andrei Marcu, Director of ERCST

- 14:40 **Preliminary remarks**
- Olivier Imbault, ERCST
 - Gabriele Romeo, ERCST

- 14:50 **Keynote**

Keynote speakers will set the stage for the roundtable discussion through a 7-10 minutes intervention. Their insights will reflect on the state of the renewable hydrogen market from a policy, technology competitiveness, and international perspective.

- Ruud Kempener, DG ENER
- Francesco Pavan, IEA
- Alex Barnes, Oxford Institute for Energy Studies

- 15:15 **Roundtable**

The roundtable discussion will provide the policy and technology recipients' perspective on renewable hydrogen uptake in the EU. Representatives from both the demand and supply side will be present, specifically from the steel, chemical, refinery and electricity industry.

Their contribution will be key in addressing the snags of the current hydrogen ecosystem. The pivotal theme to be tackled is how to efficiently rump-up renewable hydrogen use from the current almost-negligible amounts to the 2030 target.

Chair: O. Imbault, ERCST

- Stephane Tondo, ArcelorMittal
- Antoine Aslanides, Hynamics Deutschland
- Marta Lovisolo, Bellona
- Daniel Fraile, HydrogenEurope
- Martin Carbonez, TotalEnergies

- 16:15 **Q&A**

- 16:30 **End of meeting**