

What is happening in Brussels: between competitiveness and decarbonisation

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Bioenergia
Webinar
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Bienergy
EUROPE

#bepartofbioenergy



About Bioenergy Europe



Voice of bioenergy industry in Brussels since 1990



Around **180 members** including companies, associations and academia



7 Working Groups
3 Ad hoc Task Forces

Our Services:



EU Policy Monitoring & Influence



Market Data



Visibility



Networking



Free & Discounted Events

1. The Industrial Accelerator Act
2. The Heating and Cooling Strategy

1. **The Industrial Accelerator Act**
2. **The Heating and Cooling Strategy**

 This is not just a climate file, it is a broader **industrial strategy**

It will
shape

Where **low-carbon industry** is built

How fast projects move

Which **technologies** benefit from **public support**

How the EU protects strategic value chain



Target: bring **EU manufacturing to 20% of GDP by 2035** → **Currently around 14%**

Three strategic areas covered:

- **Net-zero technologies**
- **Energy-intensive industries (EIIs)** (*Annex I*) → lime, cement, steel, pulp and paper, etc.
- Automotive supply chain

For Bioenergy

 **Opportunities** → Industrial decarbonisation, voluntary classification based on GHG intensity, industrial clusters

 **Risks** → Selected technologies are favoured more explicitly

Problems

EU manufacturing is **declining** → from 17.4% of EU GDP in 2000 to **14.3% in 2024**

Strategic **dependencies** on third countries

Weak demand for EU low-carbon products

Industrial projects are **too slow to deploy**

Solutions

Faster permits

Lead markets through **procurement** and **support schemes**

Conditions on foreign investment

Industrial Acceleration Areas

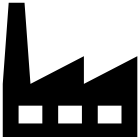


Problem: EU manufacturing is declining due also to slow permitting → The Commission wants industrial projects to move faster

What is introduced

- **Single access points** → Member States will designate a **single digital access point** for permit-granting procedures for **industrial manufacturing projects**
- **Single permit-granting procedure** → The application should be based on a **single file** and a **single competent authority** should coordinate the process

Today



Building authority



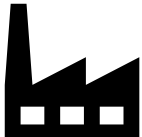
Planning authority



Environmental authority

MULTIPLE LENGTHY PROCEDURES

Permitting under Industrial Accelerator Act



SINGLE DIGITAL ACCESS POINT

ONE PROCEDURE

SINGLE COMPETENT AUTHORITY

45 DAYS ASSESSMENT

Planning authority

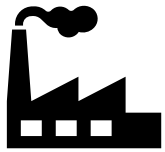
Environmental authority

Building authority

Definition: *construction or conversion of the commercial facility of an energy-intensive business in the listed sectors in Annex I that **reduce CO2-equivalent emissions of industrial processes significantly and permanently**, to the extent technically feasible.*

What is introduced

Fast-track permitting system for EIs decarbonisation projects as described in the Net-Zero Industry Act → one contact point, tighter deadlines, and more coordinated permit handling



ENERGY-
INTENSIVE
INDUSTRIAL SITE



BIOMASS



FAST-TRACK PERMITTING AS
DESCRIBED IN NZIA



Problem: Strategic **dependence on third countries** and weak demand for EU **low-carbon products**

→ The EU wants to create lead markets through procurement and support schemes

What is introduced

- **Public Procurement** → For the products listed in Annex II, union origin and/or low-carbon requirements must apply
- **Support schemes** → Member States must design certain **support schemes** so that they contribute to Union-origin and/or low-carbon objectives for the products in Annex II

What is covered by demand-side tools?

Low-carbon products

- A) A product covered by Annex II: steel, concrete and mortar, aluminium
- B) That complies with** the requirements set out in delegated acts of the Construction Product Regulation (CPR) and Ecodesign for Sustainable Product Regulation (ESPR).

Union origin



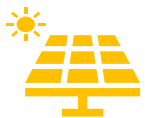
Product originating in the EU → **Made in EU principle** subject to exceptions



The IAA also amends the NZIA by adding a **new Annex II requiring public procurement to include Union-origin requirements for specified net-zero technologies.**



Battery energy
storage
systems



Solar
PV



Hydronic heat pumps



Wind
technologies



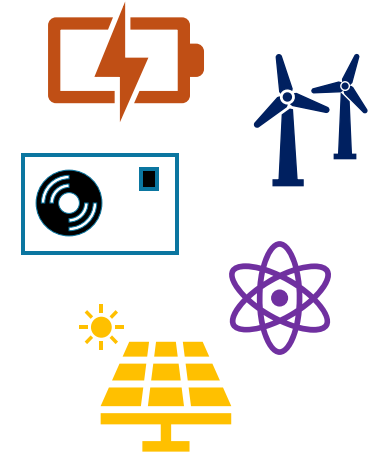
Nuclear
technologies

BIOMASS TECHNOLOGIES



Demand-side tools: what about biomass tech?

- The Act's strongest demand-side tools apply only to listed products.
- Biomass technologies **are not** included in Annex II of NZIA → bioenergy does not benefit from "Made in EU" preference

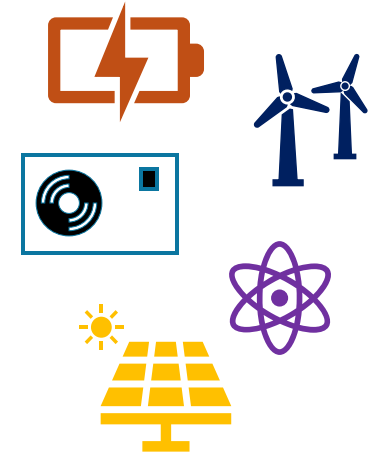


BIOMASS

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→ **MISSED OPPORTUNITY?**



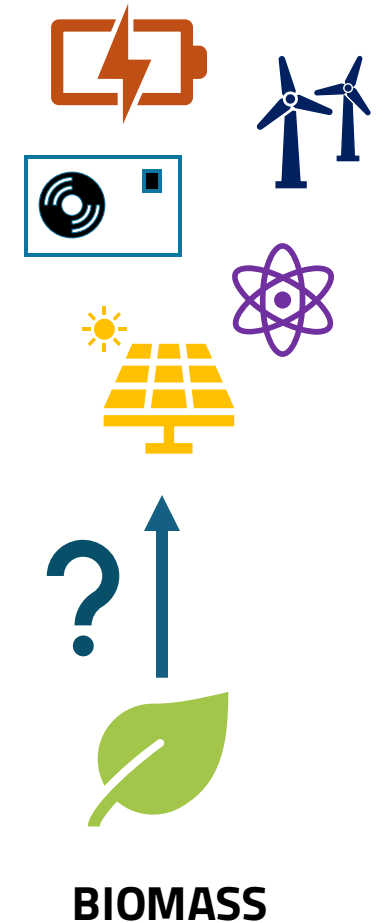
BIOMASS

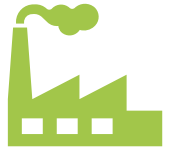
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→ **MISSED OPPORTUNITY?**

- The Commission can amend Annex II later, so **biomass technologies** could theoretically **be added** in the future.





For other industrial products, the Commission may create voluntary classifications based on greenhouse-gas intensity.

These methodologies may take into account indirect emissions linked to manufacturing inputs, including heat.

Would this apply to bioenergy? → possible **indirect** opening.

Example

A product manufactured using biomass heat rather than fossil heat could, depending on the methodology, be classified as having a lower GHG intensity.

Each Member State should designate at least one **industrial manufacturing acceleration area** within 12 months of the Regulation entering into force, considering:

- security of supply,
- industrial value chains,
- innovation potential,
- SME participation,
- regional development,
- and links to decarbonisation and competitiveness.



+ the feasibility of connecting these areas to sufficient low-carbon energy supply

- A. Bioenergy matters where it helps **decarbonise energy-intensive industries** in the context of faster permitting
- B. Bioenergy may still **benefit indirectly** through **industrial acceleration areas** as **low-carbon energy supply**.
- C. Considering that the Commission holds the power to amend the list of net-zero technologies in *Annex II* of NZIA, biomass technologies **could theoretically** be added at a later stage.

What about Bio-CCS?

Carbon-capture facilities are mentioned **once** at the end of the text (in the context of faster permitting) and **carbon dioxide emission** are mentioned in the definition of *sustainable biomass sources* → **MISSED OPPORTUNITY: Not referred to as a standalone project category and problematic equivalence with fossil CCS**

IAA: Final considerations and next steps

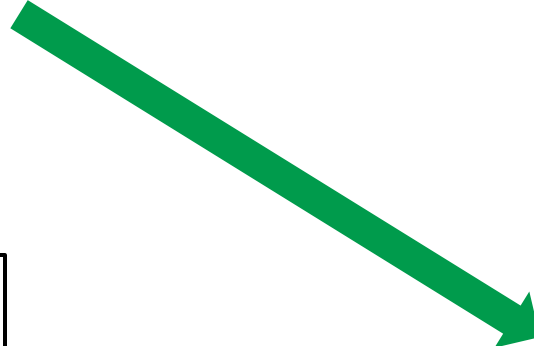
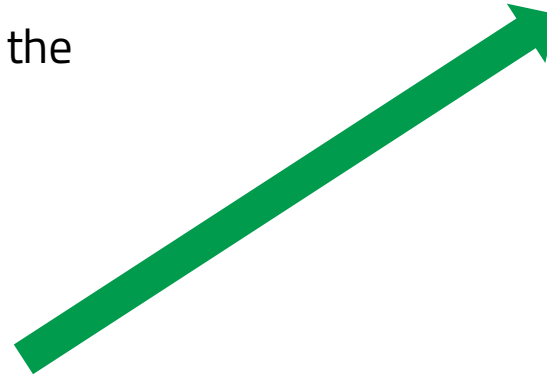
Where we are

→ **Commission proposal published** (start of the Ordinary Legislative Procedure).

→ File goes **in parallel** to the **European Parliament** and the **Council**.



Co-legislators



When the Parliament and Council approve the same version, the Act is published in the OJ and becomes law.



- **Development of a position** to be shared with our membership

- Bilateral outreach



and contribution to **amendments**





- Feedback to the [Commission's proposal](#), **open until 11 May 2026**

→ **We will continue to advocate for an adequate representation of bioenergy.**

1. The Industrial Accelerator Act

2. The Heating and Cooling Strategy

The H&C Strategy: what is it?

-  A long-term EU plan to make **heating and cooling more efficient, renewable, and connected.**
-  It aims to **reduce dependence on fossil fuels** and support the sector's contribution to the EU objective of **climate neutrality by 2050.**
-  It focuses on increasing **renewable energy** and **energy efficiency** in heating and cooling.
-  Non-binding policy framework – setting direction for future legislative action.

The Heating and Cooling Strategy: timeline

Bioenergy Europe's Position on the Revision of the EU Heating and Cooling Strategy

Bioenergy Europe welcomes the revision of the EU Heating and Cooling Strategy and stresses the importance of prioritising clean heat as a cornerstone in the energy transition.

Heat accounts for nearly half of the EU final energy consumption, making this sector one of the largest contributors to energy demand and yet one of the most overlooked. While much attention has been placed on electrification, the defossilisation of this sector—especially in buildings and industry—remains critical to the achievement of the EU's energy and climate objectives. The revised Strategy is an opportunity to lay down a clear, ambitious pathway to defossilise heat and fully tackle the potential of renewable solutions like sustainable bioenergy. In this context, other strategies such as the Bioeconomy Strategy also play a key role and should actively contribute to the defossilisation of the heating sector.

In this context, Bioenergy Europe would like to put forward 4 key issues that should be addressed in the upcoming EU Heating and Cooling Strategy.

SYNERGIES BETWEEN RENEWABLE HEAT AND ELECTRIFICATION

The future of heating in Europe must be flexible, decentralised, and resilient. While electrification is a key component of decarbonisation, it cannot stand alone.

Dispatchable and storable solutions are needed to enhance the flexibility of the energy system

Bioenergy contributes to electricity generation via combined heat and power plants and complements the electrification objective of the EU, thanks to its flexibility and storability. On the latter, it is important to note that the use of biomass improves system stability, as biogenic systems are not volatile and therefore make an important contribution to energy security.

Dispatchable, around-the-clock renewable heat sources like bioenergy are vital to balancing seasonal variations, supporting peak electricity and heat demands, and ensuring continuity during periods of low electricity supply. Moreover, the storability of biomass allows it to provide an additional layer of security by delivering extra heat during extreme cold weather, when demand is highest and other

Public Consultation

Bilateral meetings



2016

First Heating and Cooling Strategy

S2 2025

S2 2025

Stakeholder events

19 May 2026

Expected Publication of the New Strategy



Heating and Cooling: our strategy



-  Targeted political **outreach**:
EU Member States – via our membership
-  **Commissioners** – targeted political engagement
-  **Relevant DGs (Commission)** – DG RTD, ENER, AGRI, CLIMA, GROW








Heating is one of the areas where Europe can make faster and more affordable progress on climate action, but only if it is treated as a priority. Now more than ever, it is imperative to rely on local, renewable heat sources that support European manufacturing and innovation, such as sustainable bioenergy.

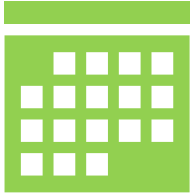
Bioenergy Europe emphasises the need to prioritise clean heat as a vital aspect of the energy transition. It calls on the Commission to incorporate these key points into the upcoming Heating and Cooling Strategy:

-  **01** Introduce clear trajectories for the phase out of fossil fuels from the heating and cooling sector.
-  **02** Accelerate and support the replacement of outdated and polluting heating systems to meet the EU's climate objectives and support citizens.
-  **03** Incentivise integrated planning to complement electrification with direct heat solutions.
-  **04** Achieve a meaningful yet realistic Ecodesign and Energy Labelling that considers affordability to ensure a just transition for all.
-  **05** Favour EU-made technologies, to promote innovation and manufacturing while boosting the EU industrial competitiveness and energy independence.

Heating and Cooling: our recommendations

-  **Phase out fossil fuels** with clear and credible trajectories.
-  **Modernise Europe's heating stock** by replacing old, polluting systems.
-  **Plan smartly** by pairing electrification with direct renewable heat solutions.
-  **Keep the transition fair** with realistic Ecodesign and Energy Labelling rules.
-  **Back EU-made clean heat technologies** to boost competitiveness and energy security.

The Heating and Cooling Strategy: what's next?

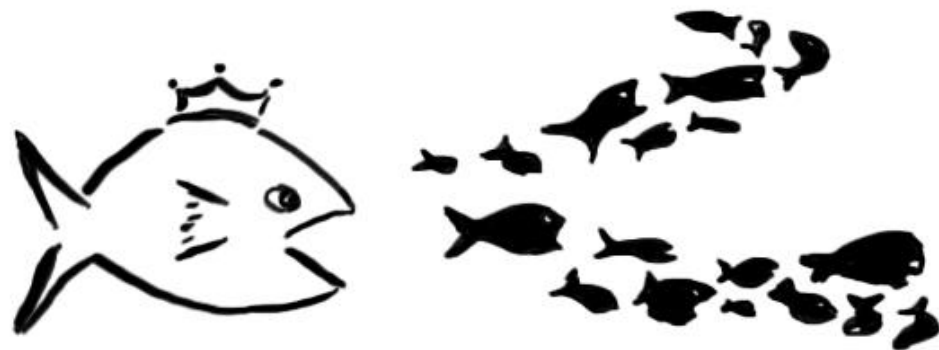


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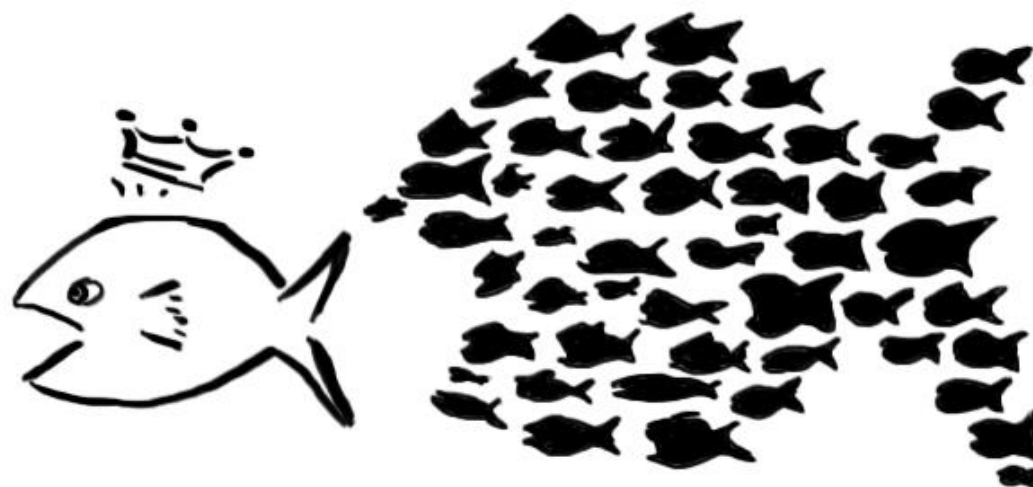


CEO's high-level meeting with **Commissioner Dan Jorgensen** and his cabinet on the **Heating and Cooling Strategy** and next steps





DON'T PANIC!



ORGANIZE.

Thank you!

