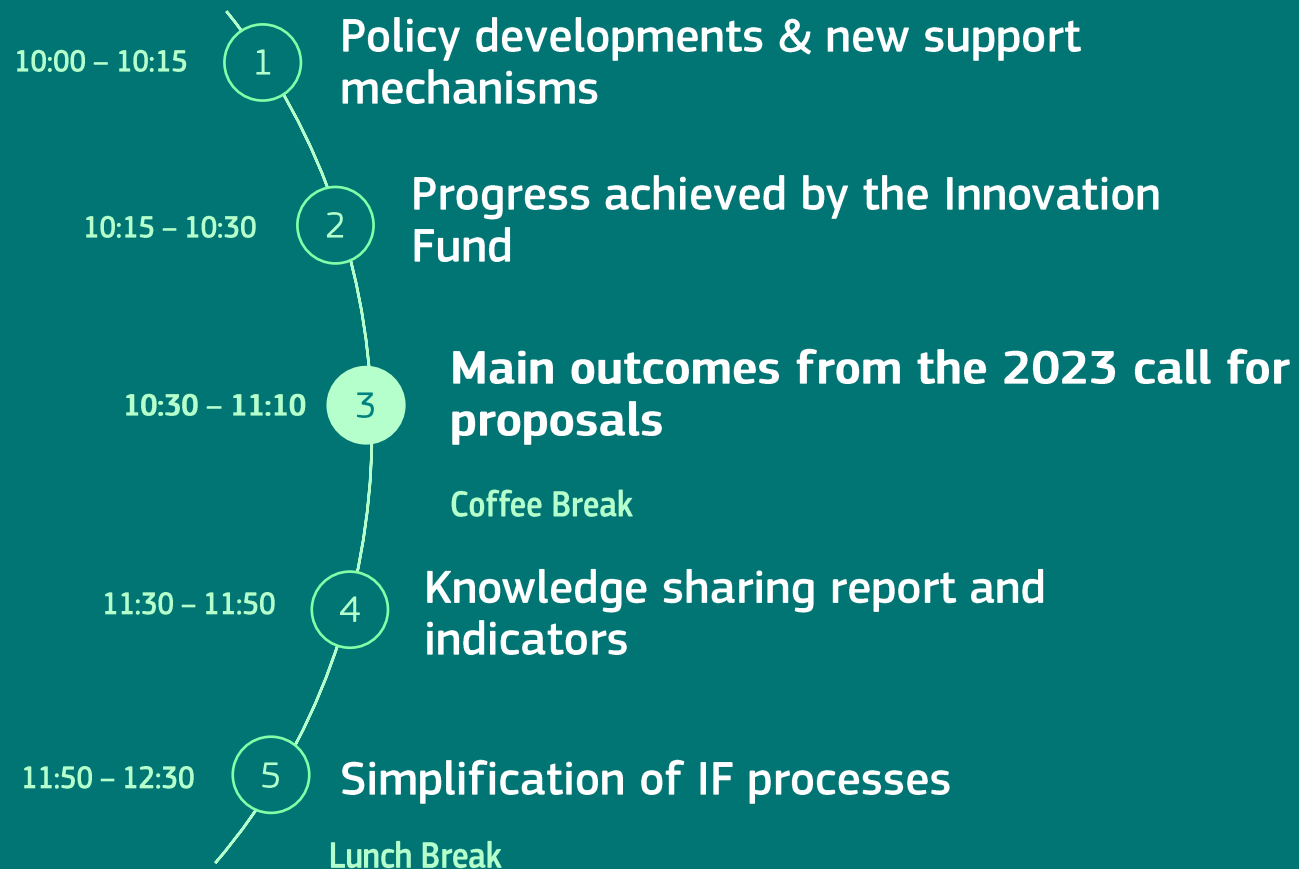


Main outcomes from the 2023 call for proposals

Javier Garcia Fernandez, DG CLIMA,
Policy Officer - C.2 - Low Carbon
Solutions (II): Research & Low
Carbon Technology Deployment



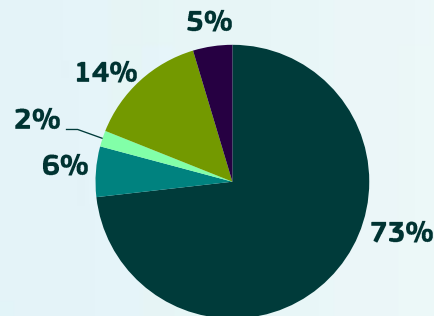
IF23Call with a budget of EUR 4 billion distributed in 5 topics

Topic	Topic budget
INNOVFUND-2023-NZT-GENERAL-LSP	EUR 1 700 000 000
INNOVFUND-2023-NZT-GENERAL-MSP	EUR 500 000 000
INNOVFUND-2023-NZT-GENERAL-SSP	EUR 200 000 000
INNOVFUND-2023-NZT-MANUFACTURING	EUR 1 400 000 000
INNOVFUND-2023-NZT-PILOTS	EUR 200 000 000

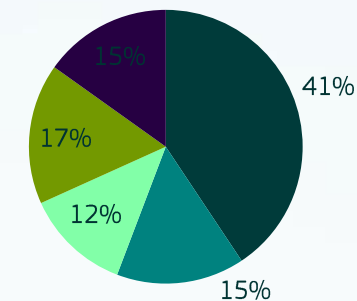
6x oversubscription showing continued large demand for decarbonisation projects

- **337 proposals received** requesting **EUR 24.66 billion in grant** support from IF
- With an initial budget of **EUR 4 billion** – that means an **oversubscription of x6.2 times**
- The most attractive topic has been the **Large Scale Projects (LSP)**, receiving 40% of the proposals and representing 73% of the total grant requested. The average size of the project applying to that topic has been EUR 700 million CAPEX.

Requested EU funding



Number of projects

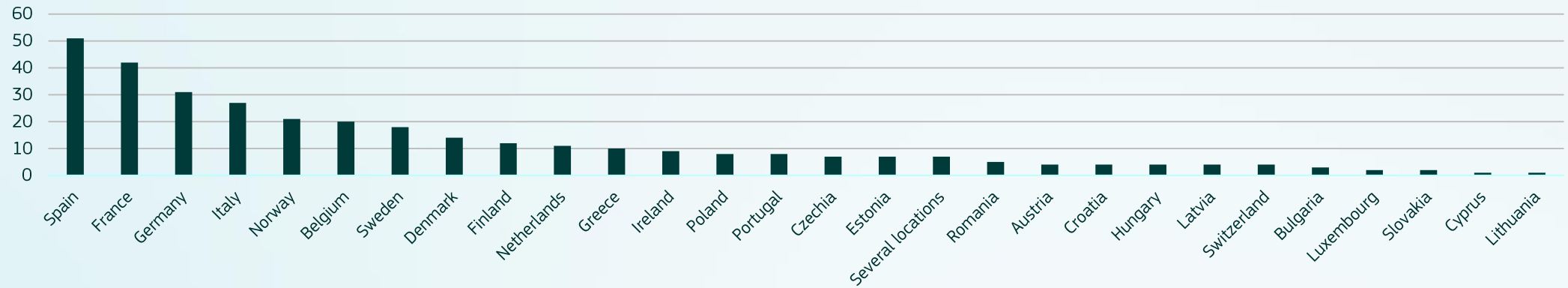


- INNOVFUND-2023-NZT-GENERAL-LSP
- INNOVFUND-2023-NZT-GENERAL-MSP
- INNOVFUND-2023-NZT-GENERAL-SSP
- INNOVFUND-2023-NZT-MANUFACTURING
- INNOVFUND-2023-NZT-PILOTS

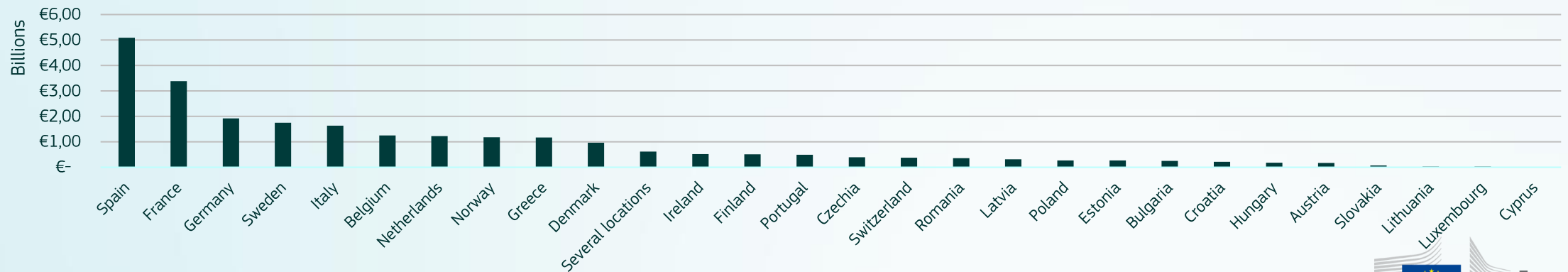
- INNOVFUND-2023-NZT-GENERAL-LSP
- INNOVFUND-2023-NZT-GENERAL-MSP
- INNOVFUND-2023-NZT-GENERAL-SSP
- INNOVFUND-2023-NZT-MANUFACTURING
- INNOVFUND-2023-NZT-PILOTS

Spain, France, and Germany are most common country of origin of the proposals

Number of proposals by country

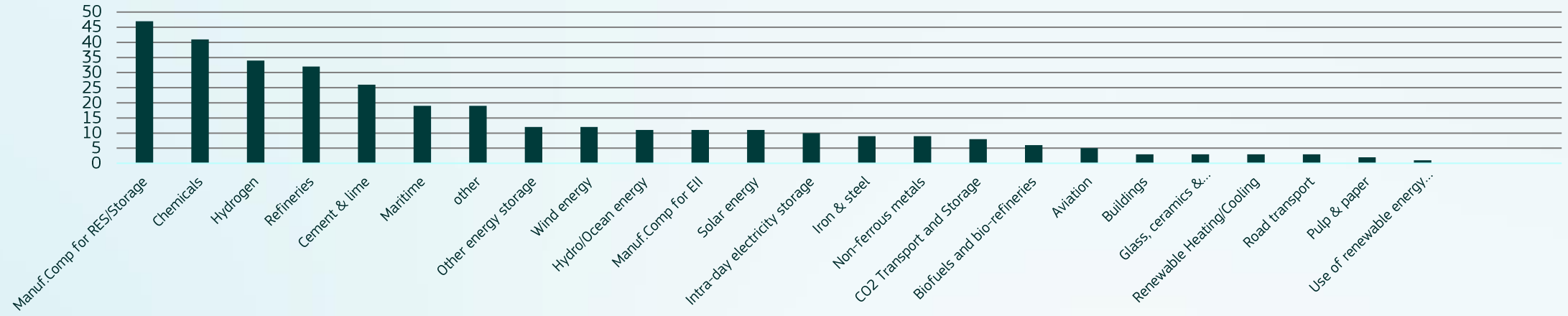


Requested grant amount per country

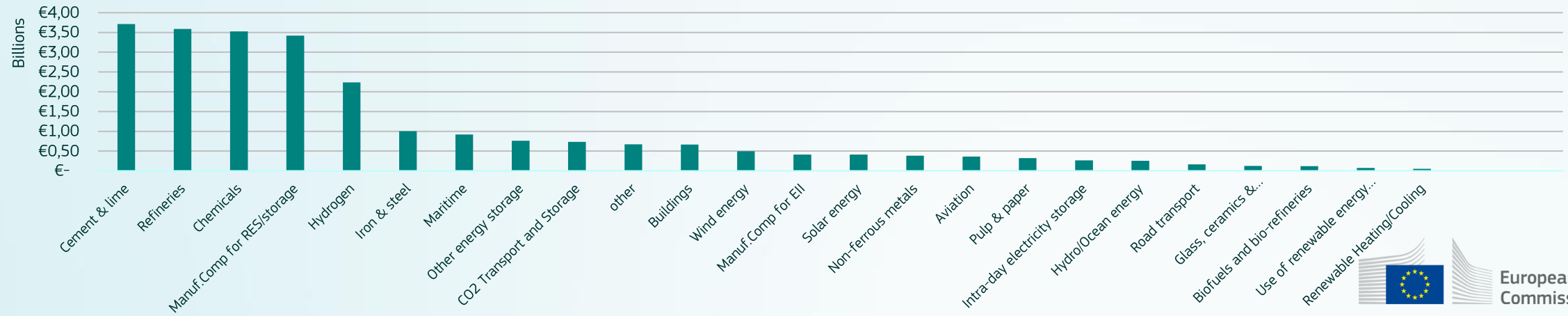


Cement, Refineries, Chemicals and Hydrogen sectors represent 52% of grant requested

Number of applicant projects by sector



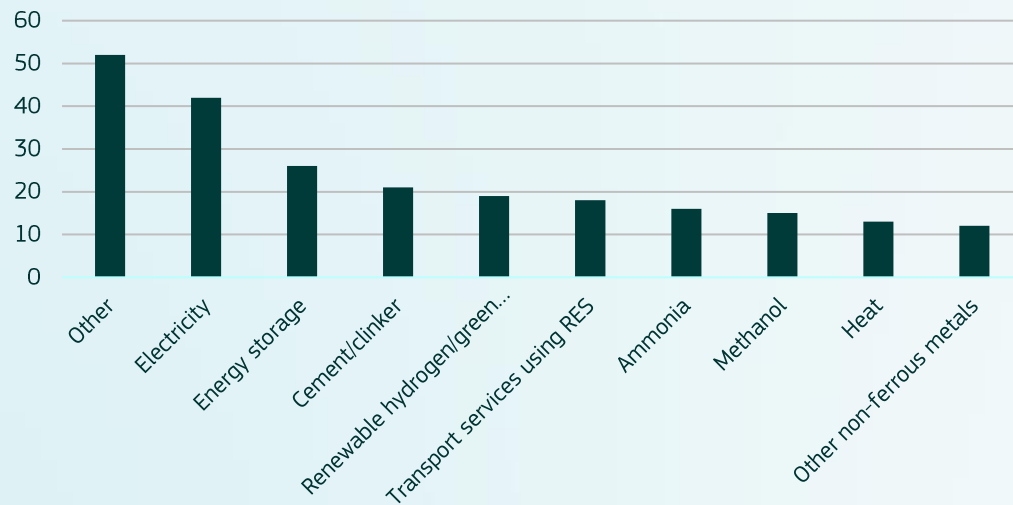
Amount of Requested Grant Support from sectors



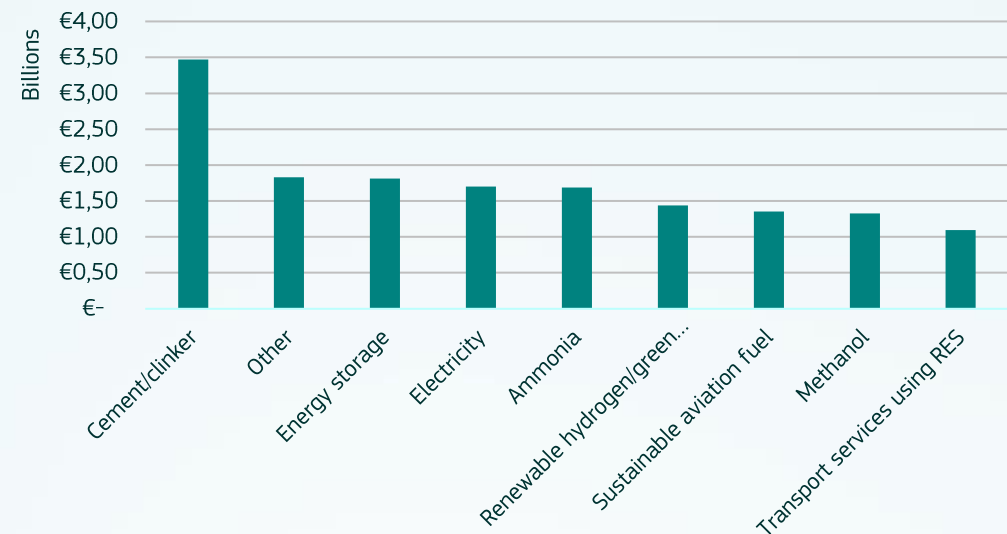
Based on principal products, most funding is requested for producing clinker, energy storage and electricity

- The main principal product requesting support is cement clinker production

Top-10 number of applications having as principal product...

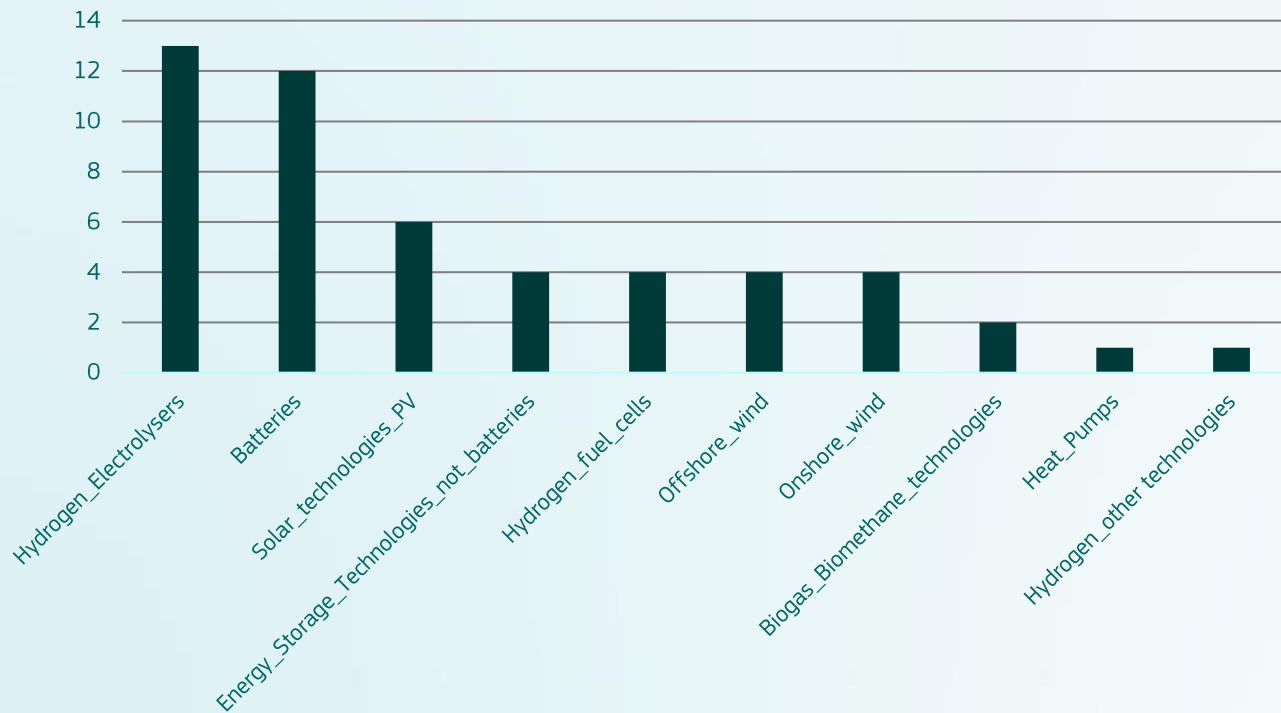


Top-10 amount of grants requested in projects having as principal product...



The most common technology to be manufactured is Hydrogen Electrolysers

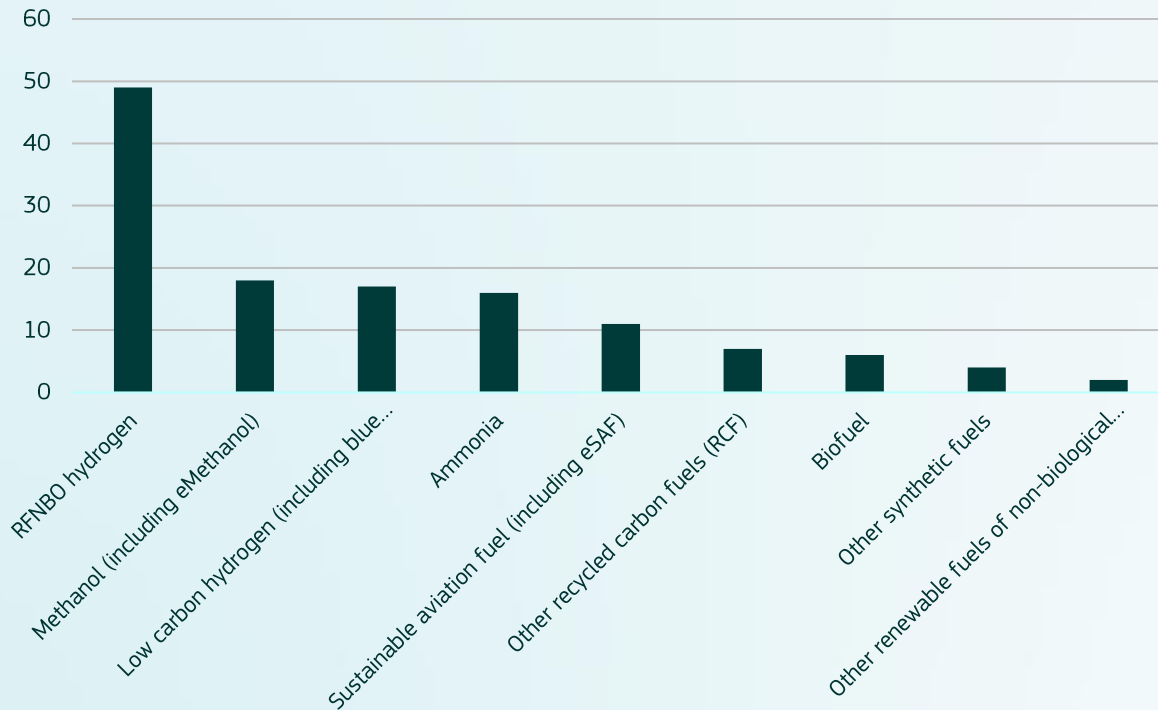
Topic NZT manufacturing - Number of projects



- **Hydrogen Electrolysers, Batteries and Solar PV** are the most commonly technologies manufactured
- **More than 8 GW/year** production of full electrolysers stacks
- More than **85,000 tons/year of anode and cathode** materials for batteries
- More than **12 GW/year** of solar PV modules production

89 proposals produce renewable fuels in their process

Renewable Fuels produced by applicants
(number of projects)

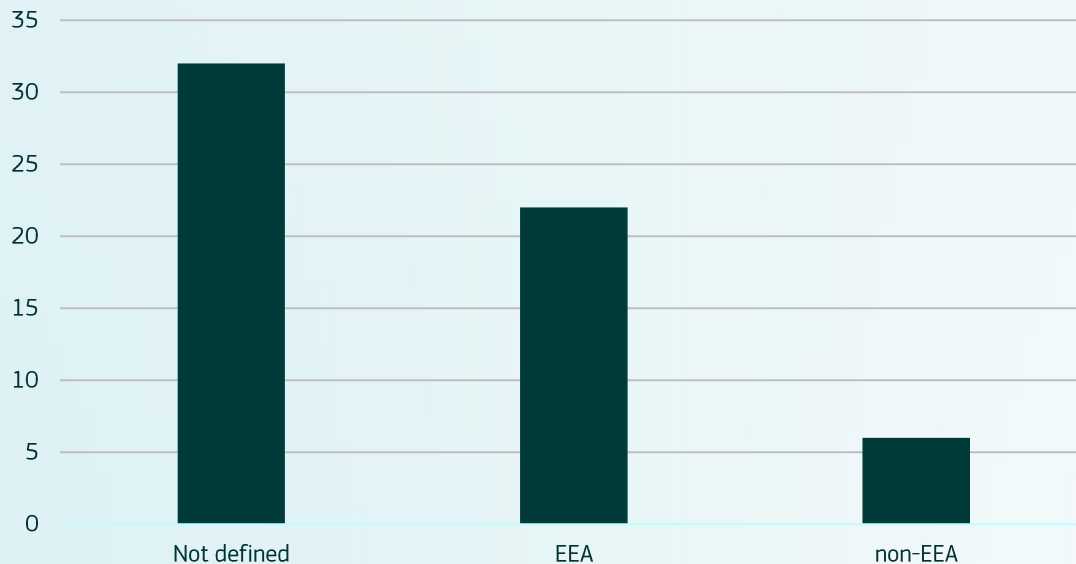


- Regardless of the topic applied to, **26%** of the projects are producing at some stage renewable fuels
- **RFNBO H2** is the most common product, in 49 of the cases
- During their project **lifetime**, applicants could produce
 - **33.13** million tons of **RFNBO Hydrogen**
 - **15,43** million tons of **low-carbon Hydrogen**
 - **43** million tons of **methanol**
 - **119.5** million tons of **ammonia**
- For that purpose **11.1 GW of electrolyzers would be installed** (55 projects)

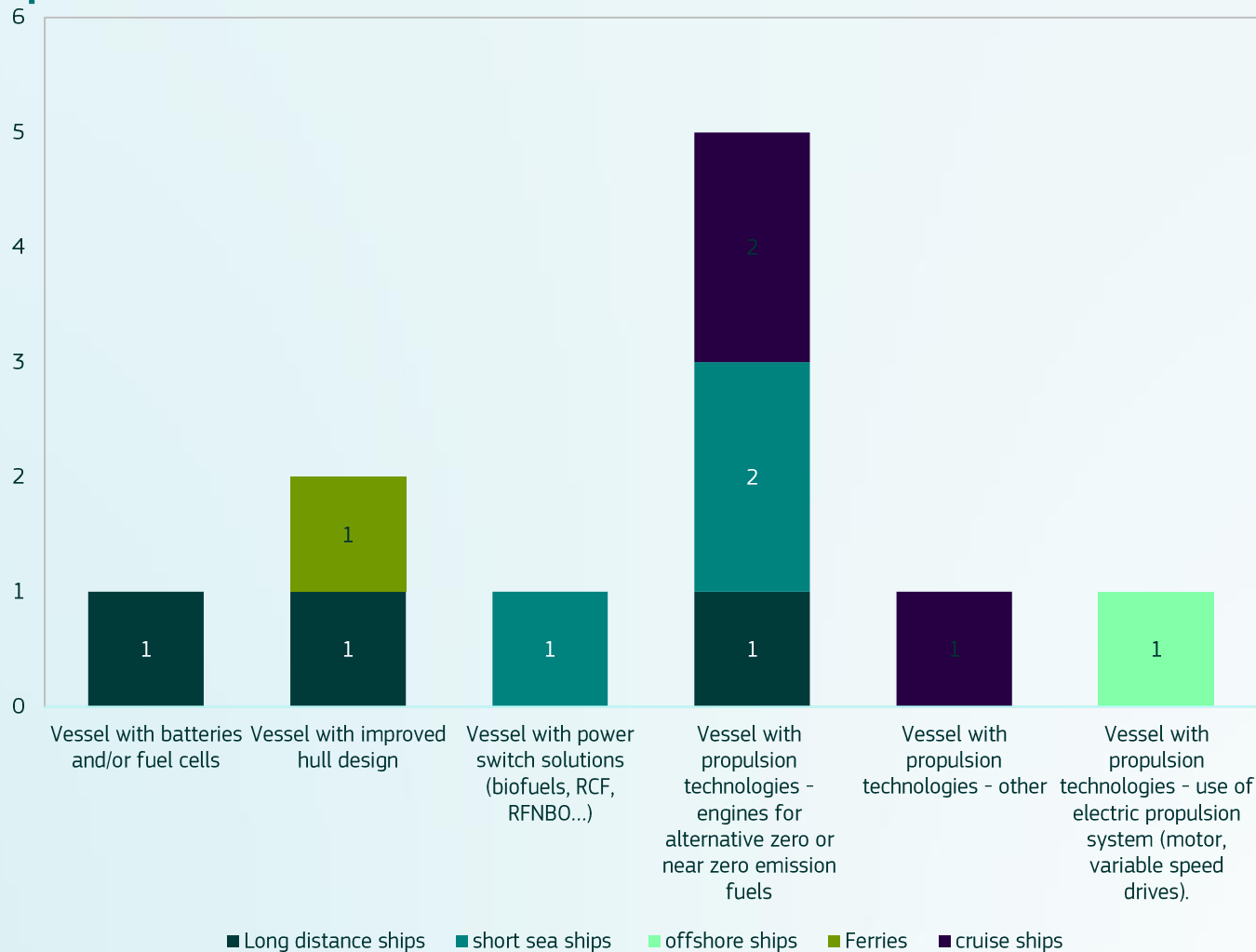
Among the renewable fuel producers, preference to procure equipment within the EEA

- The main NZT component procured by these projects is the **full electrolyser stack**. Origin is mostly not defined, but it seems to be preference for EEA origin.
- **Batteries components** reported (22), 63% do not have the origin defined, with the remaining 37% planned to be procured within the EEA.

Planned origin of reported procured electrolyser stacks

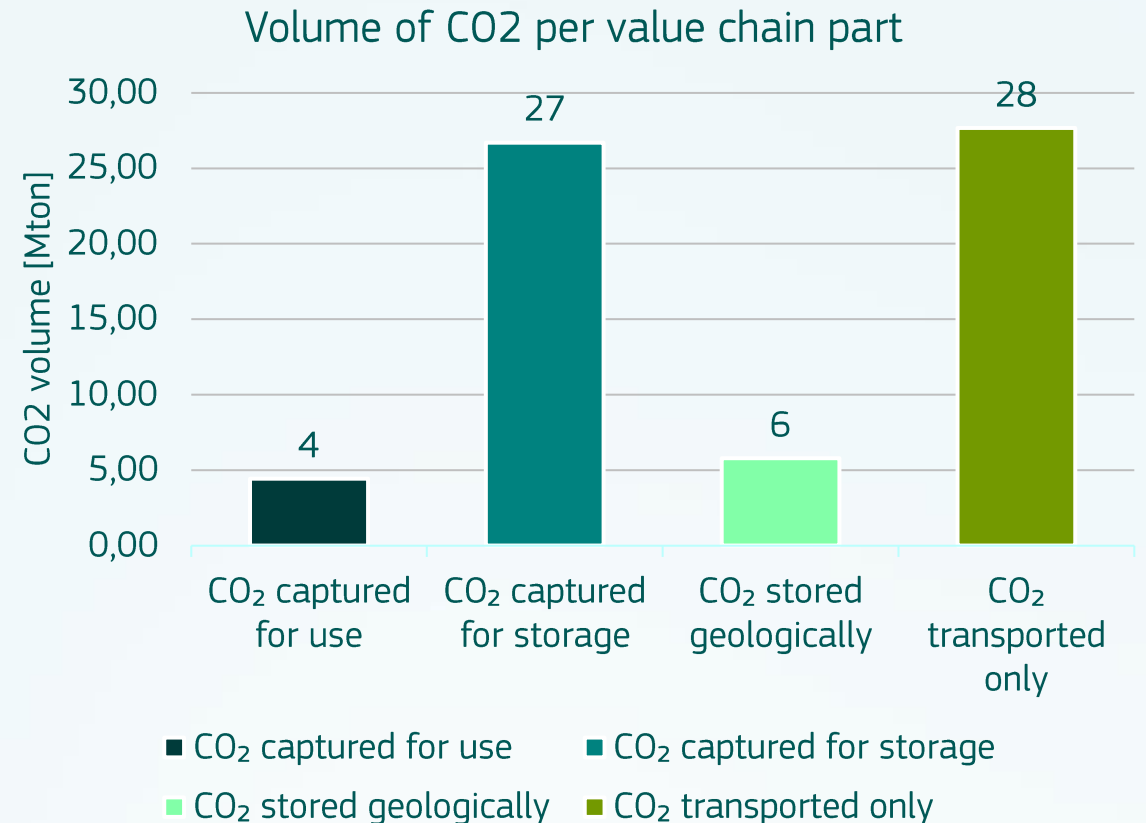
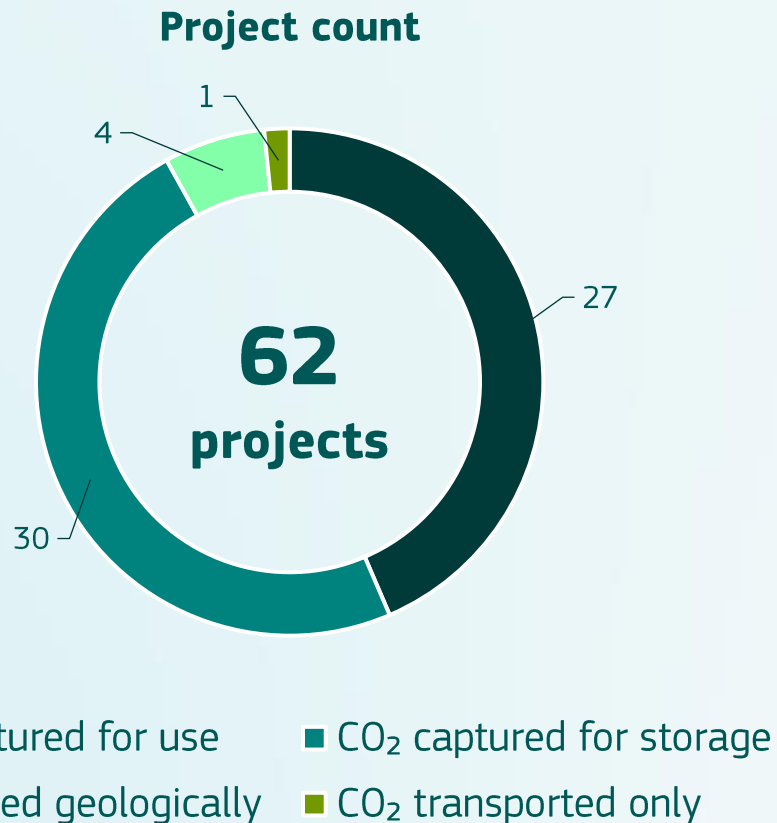


11 projects are proposing to manufacture vessels

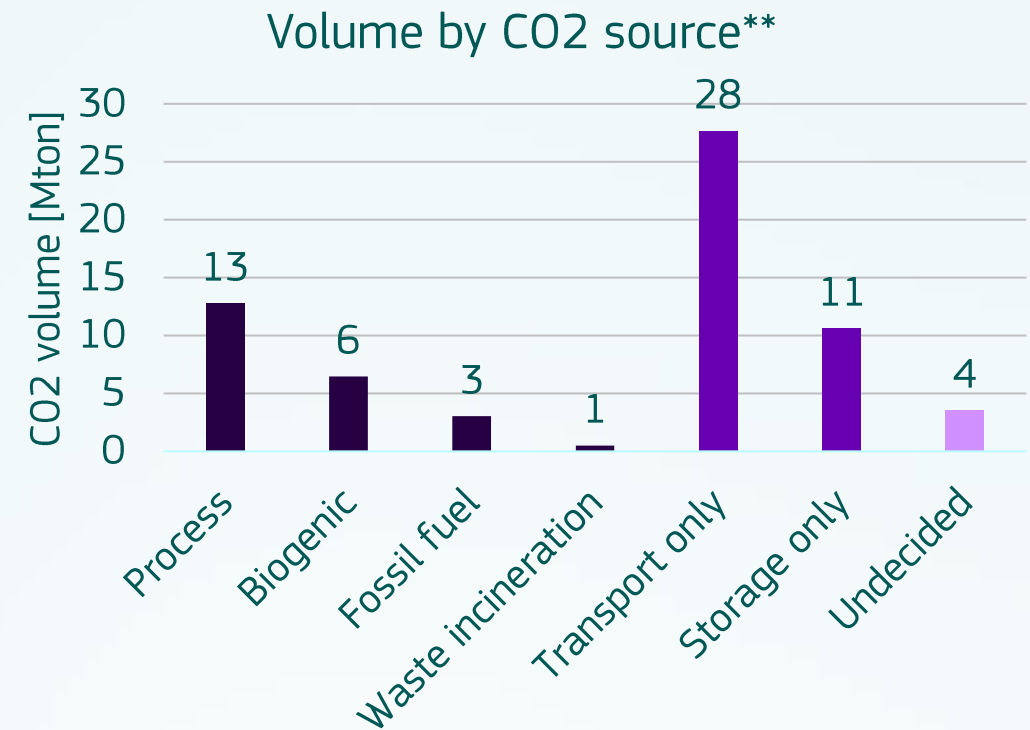
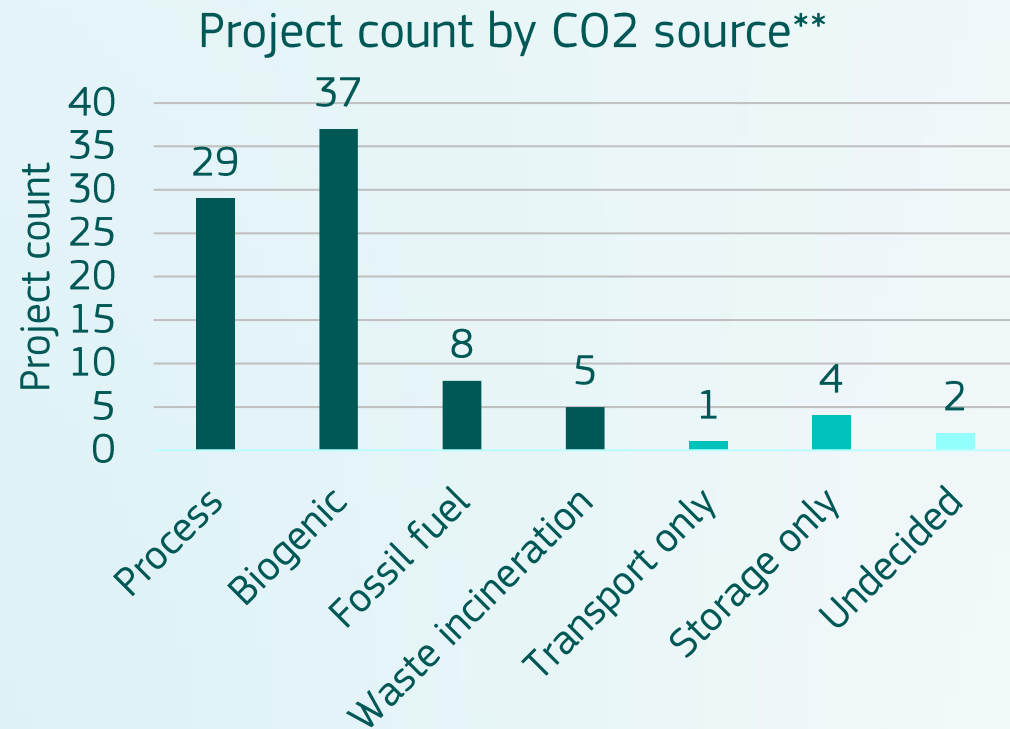


- Projects manufacturing vessels represent **2.2% of the total grant requested in IF23**
- The main purpose of applicants manufacturing vessels is to address **new engines for alternative fuels**
- Most common type of ships, are **long distance and short sea ships**

ICM projects (aka CCUS): by value chain part



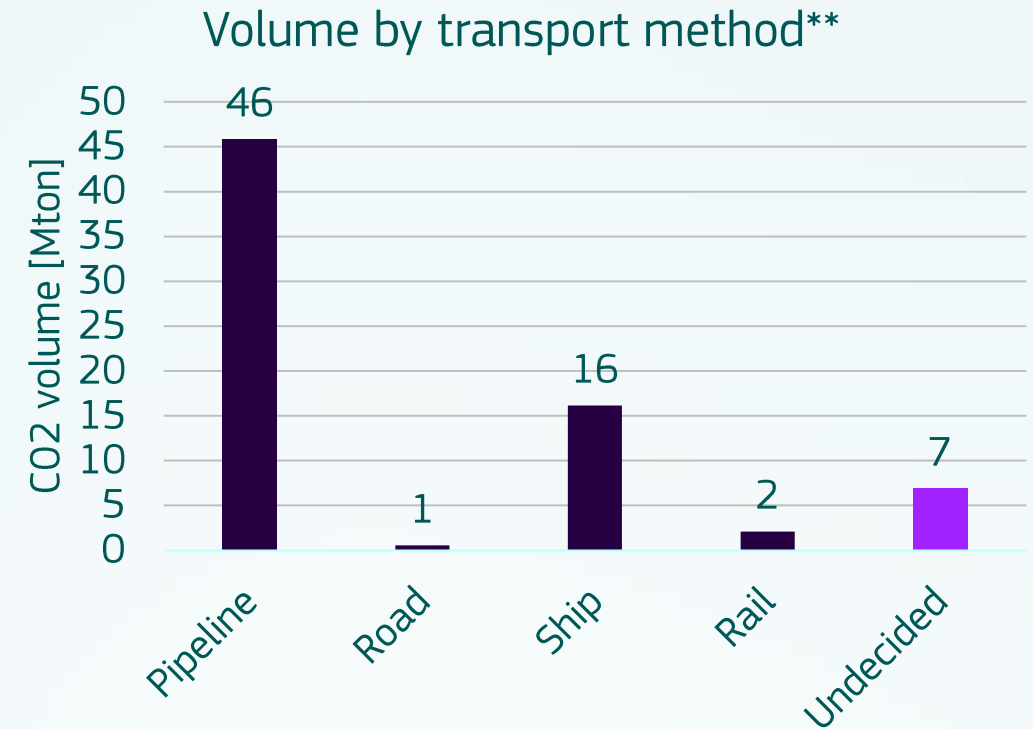
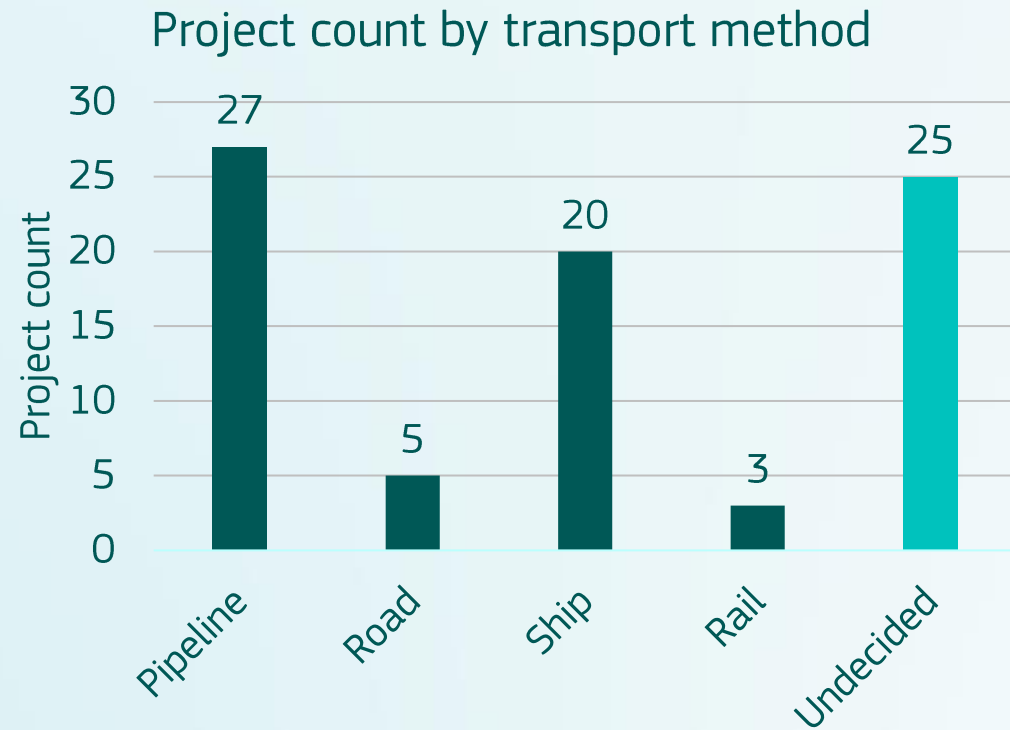
ICM projects: by CO₂ source*



* In the analysis, projects can have up to two linked sources.

** Including estimates / averaging when share within project not clear; excluding storage/transport only.

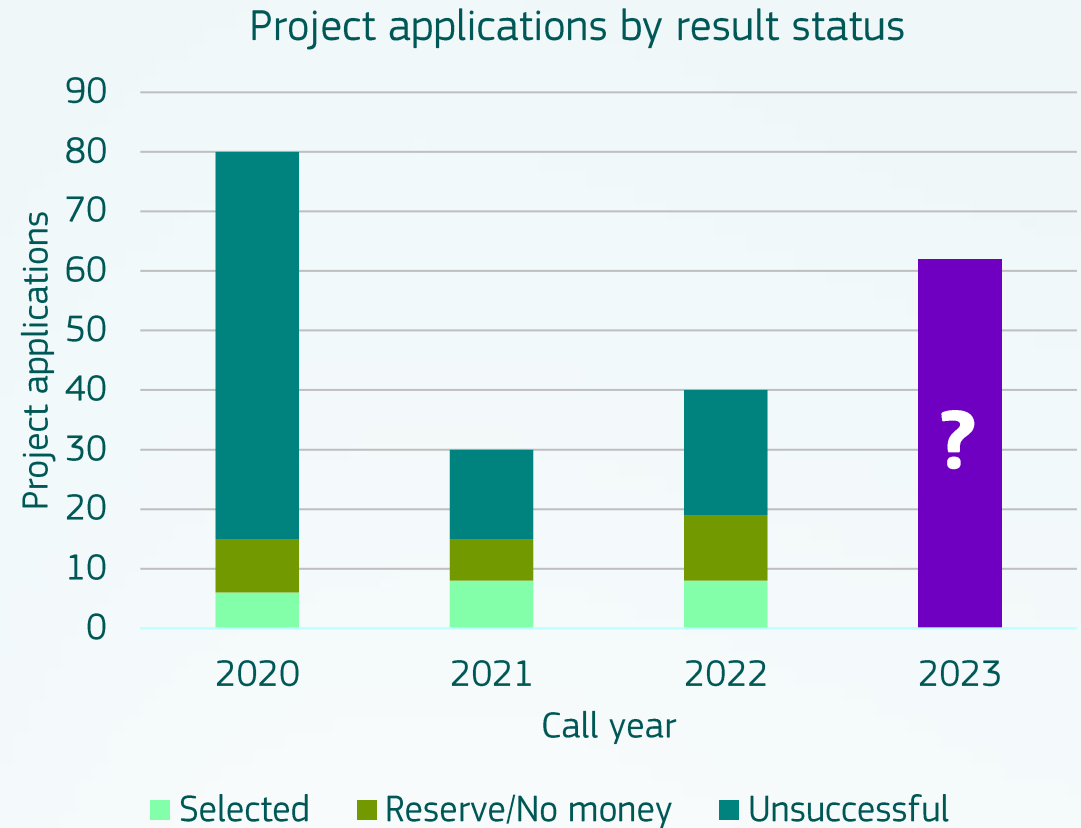
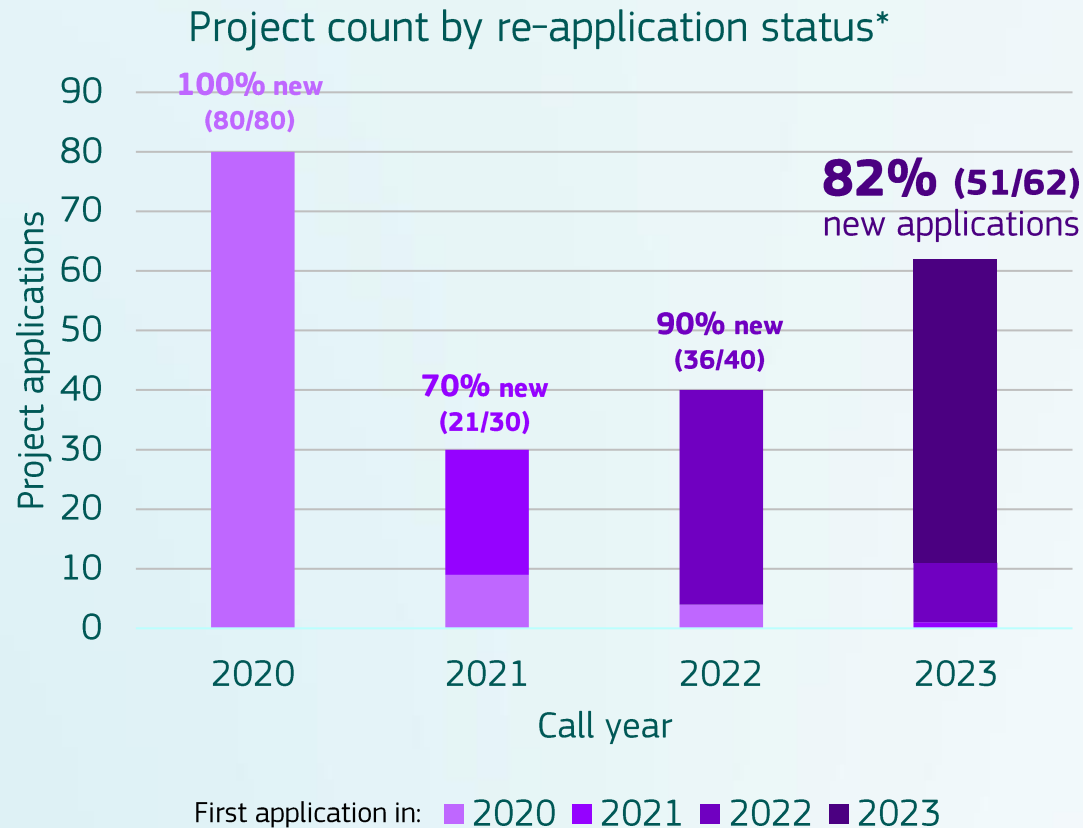
ICM projects: by transport mode*



* In the analysis, projects can have up to two linked transport methods.

** For projects with two transport methods, 100% of volume counts towards both.

ICM projects: application trend (2021-23)



* Based on project acronym. Applications with different acronyms are counted as new. No project has applied to more than two calls.