

Joint roadmap on decarbonization and competitiveness: state of play on Clean Industrial Deal

Flagship actions - Access to affordable energy and infrastructure	Timeline
DELIVERED	
Action Plan on Affordable Energy	COM adoption on 26.02.2025
Energy Union Task Force	launch on 16.06.2025
EIB EUR 500 million pilot offering financial guarantees for off takers of Power Purchase Agreements, with a focus on SMEs and energy-intensive industry	launch on 19.06.2025
EIB EUR 1.5 billion Pan-EU Power Grid Package (offering counter-guarantees to mitigate risks associated with manufacturing new grid components)	launch on 16.04.2025
8 th Nuclear Illustrative Programme report • up-to-date overview of nuclear energy investments needs in the EU and financing models for efficient investment plans • role of nuclear in decarbonising the EU's energy system	COM adoption on 13.06.2025
Legislative proposal on the extension of the Gas Storage Regulation	final adoption on 27.06.2025
Guidance package covering (i) innovative technologies and forms of renewable energy deployment, (ii) the designation of dedicated grid and storage infrastructure areas and (iii) network tariff methodologies.	COM adoption on 2.07.2025
Tripartite contracts for Affordable Energy (first two on offshore wind and grids; and storage)	launch on 4.09.2025
UPCOMING	
Sustainable Transport Investment Plan	Q4 2025
European Grids Package	Q4 2025
Recommendation on energy taxation	Q4 2025
Guidance on promoting remuneration of flexibility in retail contracts	Q4 2025
Guidance on Contracts for difference (CfD) design, including on combining CfDs and PPAs	Q4 2025
Clean Energy Investment Strategy	Q1 2026
KPI – Increase economy-wide electrification rate from 21.3% today to 32% in 2030 ¹ KPI - Annually install 100 GW of renewable electricity capacity up to 2030 ²	

¹ Eurostat data, presented in SWD (2025) 11 final

² https://ec.europa.eu/eurostat/databrowser/view/nrg_inf_epc_custom_15272393/default/table?lang=en

Flagship actions - Lead markets: boosting clean supply and demand	Timeline
DELIVERED	
Delegated act on low carbon hydrogen	COM adoption on 7.07.2025
Communication on greening corporate fleets	COM adoption on 5.03.2025
Targeted amendment to CO ₂ standards for cars and vans, giving flexibility to the automotive sector to comply with the 2025 targets on fleet sales	final adoption on 8.05.2025
UPCOMING	
Legislative proposal on greening corporate fleets	Q4 2025
Review of the CO ₂ emission standards for cars and vans	Q4 2025
Public Procurement Act to mainstream the use of non-price criteria	Q2 2026
Industrial Accelerator Act	Q4 2025
KPI – Reach 40% of domestically produced key components of clean tech products on the EU market³ KPI - Decrease external vulnerabilities for Clean Industrial Deal products as measured by the External Vulnerability Index from 0.19 today. (EXVI)⁴.	

³ Regulation (EU) 2024/1735 Art. 42

⁴ The European Commission's External Vulnerability Index (EXVI) will be reported on in the Annual Single Market Competitiveness Report. It is a tool that assesses the EU's vulnerability to external economic shocks. Using granular trade data, EXVI evaluates dependencies, competitive positions, and economic exposure to support informed policy decisions and promote industrial resilience. EXVI tracks progress towards the EU's Clean Industrial Deal goals, aiming to reduce vulnerabilities in key sectors. 0 = low vulnerability, 1 = high vulnerability.

Flagship actions – Public and private investment	Timeline
DELIVERED	
Increase InvestEU's risk bearing capacity The proposed changes are expected to mobilise around EUR 50 billion in additional public and private investment.	provisional agreement on 23.09.2025
EIB EUR 250 million CleantechEU guarantee scheme focused on highly innovative SMEs	launch 20.06.2025
EIB EUR 1.5 billion top-up of the Wind Package supporting European wind turbine and component manufacturers	launch 20.06.2025
Mid-term review of cohesion policy, including targeted amendments to the European Regional Development Fund, Cohesion Fund, Just Transition Fund and the European Social Fund Plus (ESF+)	final adoption on 18.09.2025
IPCEI Design Support Hub	launch on 9.04.2025
Clean Industrial Deal State aid framework	COM adoption on 25.06.2025
Recommendation on tax incentives to support the Clean Industrial Deal	COM adoption on 2.07.2025
Terms and conditions for the pilot auction under the Innovation Fund for the upcoming Industrial Decarbonisation Bank (budget of EUR 1 billion aimed at decarbonising industrial process heat)	10.10.2025
UPCOMING	
Flagship call under Horizon Europe	Q4 2025
Launch the pilot auction for the Industrial Decarbonisation Bank	December 2025
Commission proposal on Industrial Decarbonisation Bank	Q2 2026
EIB TechEU investment programme on scale-ups - EUR 70 billion in startup funding by 2027 (with expectation generate at least EUR 250 billion in investments) - for innovative companies in a number of sectors, including critical raw materials and cleantech	2025-2027
KPI: Increase the total volume of investment supporting industrial transition from EUR 52.7 billion ⁵	

⁵ https://investeu.europa.eu/investeu-programme/investeu-fund/investeu-indicators_en#key-indicators-selection

Flagship actions – Powering the circular economy: a secure access to materials and resources	Timeline
DELIVERED	
First and second list of Strategic Projects under the Critical Raw Materials Act	25.03.2025 (EU projects) 4.06.2025 (external)
Ecodesign Work Plan: list of products that should be prioritised, such as steel and aluminium, in introducing ecodesign requirements and energy labelling over the next five years.	COM adoption 16.04.2025
UPCOMING	
Circular economy mini-package	Q4 2025
EU Critical Raw Materials Centre for joint purchases and management of strategic stockpiles	Q4 2026
Circular Economy Act	Q3 2026
Green VAT initiative	Q4 2026
Trans-Regional Circularity Hubs	Q4 2026
KPI: Increase circular material use rate from 11.8% today to 24% ⁶ by 2030 ⁷	

⁶ COM (2020) 98 final – A new Circular Economy Action Plan

⁷ Reported in the Annual Single Market and competitiveness Report ([2025 edition link](#))

Flagship actions – Global markets and international partnerships	Timeline
DELIVERED	
Provisional agreement with South Africa on: • Memorandum of Understanding on Clean Trade and Investment Partnership • Memorandum of Understanding on Strategic Partnership on Sustainable Minerals and Metals Value Chains	9.10.2025
Simplification of the Carbon Border Adjustment Mechanism (CBAM)	provisional agreement on 18.06.2025
Communication Delivering on the Clean Industrial Deal announcing intentions on carbon leakage for CBAM exports	COM adoption 2.07.2025
Adjustments tightening the current steel safeguard measure	entry into force on 1.04.2025 and 1.07.2025
Proposal for a long-term steel measure that will provide a highly effective level of protection to the EU's steel sector post June 2026	COM adoption on 7.10.2025
UPCOMING	
Legislative proposal on CBAM addressing the risk of carbon leakage for exports, extension to downstream sectors and introducing anti-circumvention measures	Q4 2025
Trans-Mediterranean Renewable Energy and Clean Tech Initiative	Q4 2025/Q1 2026
Guidelines on Foreign Subsidies Regulation	Q1 2026

Flagship actions – Skills and quality jobs for social fairness	Timeline
DELIVERED	
Union of Skills	COM adoption on 5.03.2025
UPCOMING	
Quality Jobs Roadmap	Q4 2025
Guidance on social leasing for clean products	Q4 2025/Q1 2026
European Fair Transition Observatory	Q1 2026
Skills Portability Initiative	Q3 2026
Review of State aid GBER rules for social enterprises and recruitment of disadvantaged workers	Q4 2027
KPI: Reducing the number of occupations requiring specific skills or knowledge for the green transition where at least five Member States reported a shortage. In 2024, there were 27 such occupations ⁸ .	

⁸ As reported 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)