

ENERGY STORAGE

Global Conference

Brussels, 14-16 October 2025

2025



Session 1.7 State Aid for Manufacturing



Luca Taranto

European
Commission



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Partnership Association
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Sofía Riaño

European Climate,
Infrastructure, and
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Moderator:

Patrick Clerens

Secretary General, Energy Storage Europe

Session 1.7 State Aid for Manufacturing

Luca Taranto

Case Handler DG COMP - Unit H1
European Commission



State aid to support the CID objectives



CISAF at a glance

The Clean Industrial Deal State Aid Framework **CISAF**



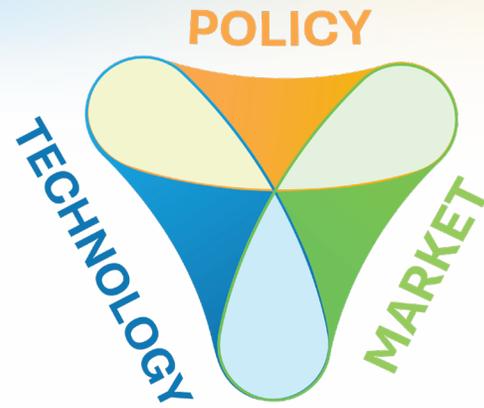
CISAF complements the existing State aid rule book (e.g., CEEAG, RAG, GBER)

CISAF delivers on the Clean Industrial Deal Objectives

- **Accelerating the clean energy transition**
- **Achieving well-balanced energy markets & less volatile energy prices**
- **Achieving greenhouse gas reductions / reduce fossil fuel dependencies**
- **EU to become a manufacturing powerhouse**
- **Leveraging private funds to unlock clean investments**

While:

- **simplifying / reducing administrative burden**
- **stimulating innovation**
- **encouraging circularity**



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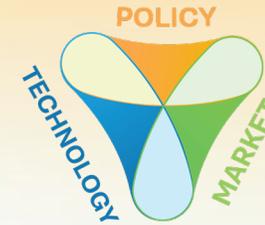
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THANK YOU!



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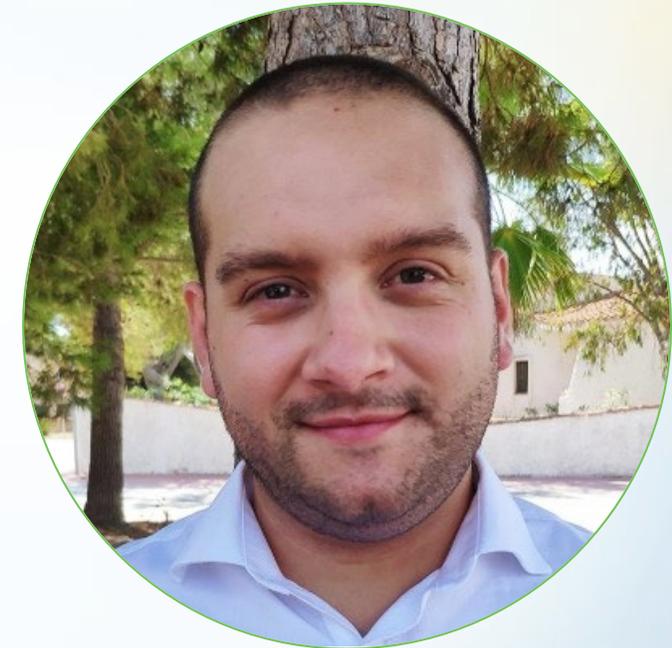


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State-aid: key for storage manufacturing

Let's focus on our strengths



State-aid: key for storage manufacturing

Let's focus on our strengths

- State aid for manufacturing isn't a zero-sum game
- Spillover benefits thanks to the Single Market: When one MS wins, the entire EU industrial ecosystem benefits, including non-subsidised



Green transition, single market and EU's open strategic autonomy: the impact of state aid.

Single Market Economics Briefs (European Commission's Joint Research Centre). J. M. Rueda-Cantuche, L. E. Pedauga, J. C. Ruiz-Garcia, D. Ciriaci.

State-aid: key for storage manufacturing

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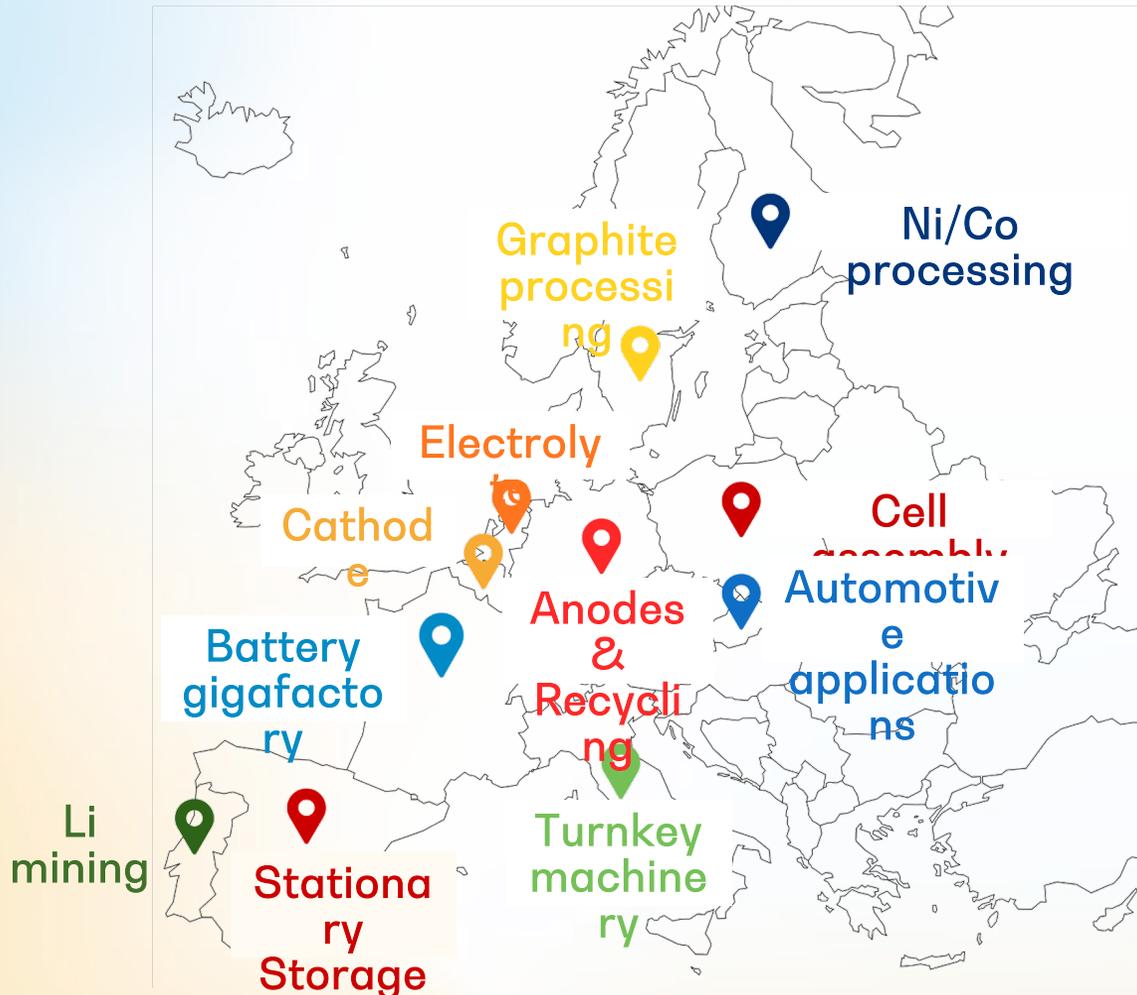


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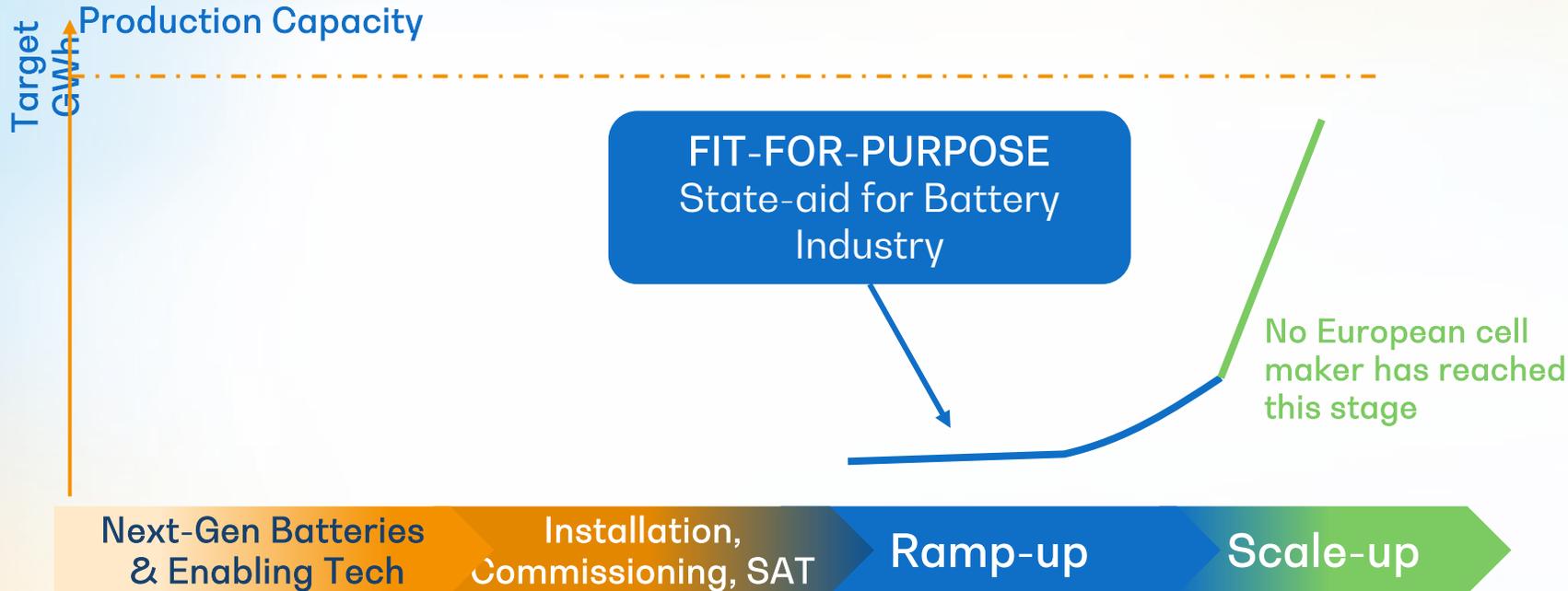
State-aid: key for storage manufacturing

Let's focus on our strengths



- State aid for manufacturing isn't a zero-sum game
- Spillover benefits thanks to the Single Market: When one MS wins, the entire EU industrial ecosystem benefits, including non-subsidised
- Competitiveness, strategic independence and industrial resilience
- Lower fragmentation, higher impact

State-aid for ramp-up



- Main Challenges of Battery Production Ramp-Up, Demanding OPEX support:**
- **GWh-scale** Parallel and Dynamic Cell Development, EV Integration, and Material Supply Alignment
 - Turnkey Machinery & Equipment (In-House & European) Competence
 - Personnel Ramp-Up and Qualification



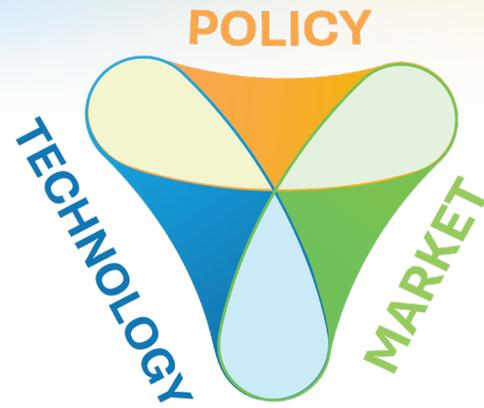
TRL 4-7



ECF (next MFF)

What is needed?
Support not limited to cell manufacturing, but also to next-gen and enabling tech. An output-based support addressing OPEX-intensive ramp-up of battery production. Sliding scale from 25 €/kWh to 15 €/kWh over 6 years

ECF: Single rulebook and ECF toolbox are good news. Implementation still unknown.



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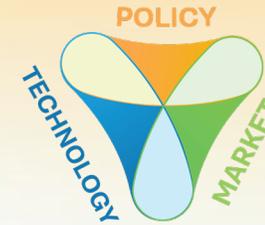
THANK YOU!



j.gonzalez@bepassociation.eu



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Sofía Riaño

Project Adviser for Innovation Fund
European Climate, Infrastructure, and
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The Innovation Fund in a Nutshell

Sofía Riaño
Project Adviser, Innovation Fund
European Climate, Infrastructure and Environment Executive Agency (CINEA)

*State Aid for Manufacturing
Energy Storage Global Conference, 14-16 October 2025,
Brussels*



INNOVATION FUND

Deploying innovative net-zero technologies for climate neutrality

Funded by the EU Emissions Trading System



€40 billion* available between 2020-2030

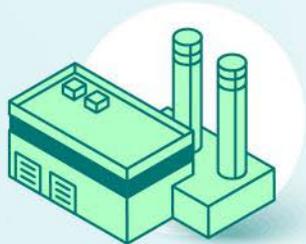


grants awarded through regular calls and auctions



avoid GHG emissions, boost competitiveness

supporting innovation in:



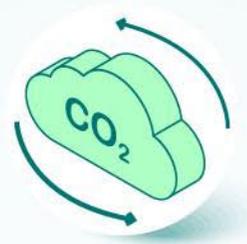
Energy-intensive industries



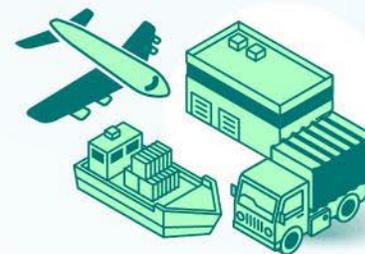
Renewable energy



Energy storage



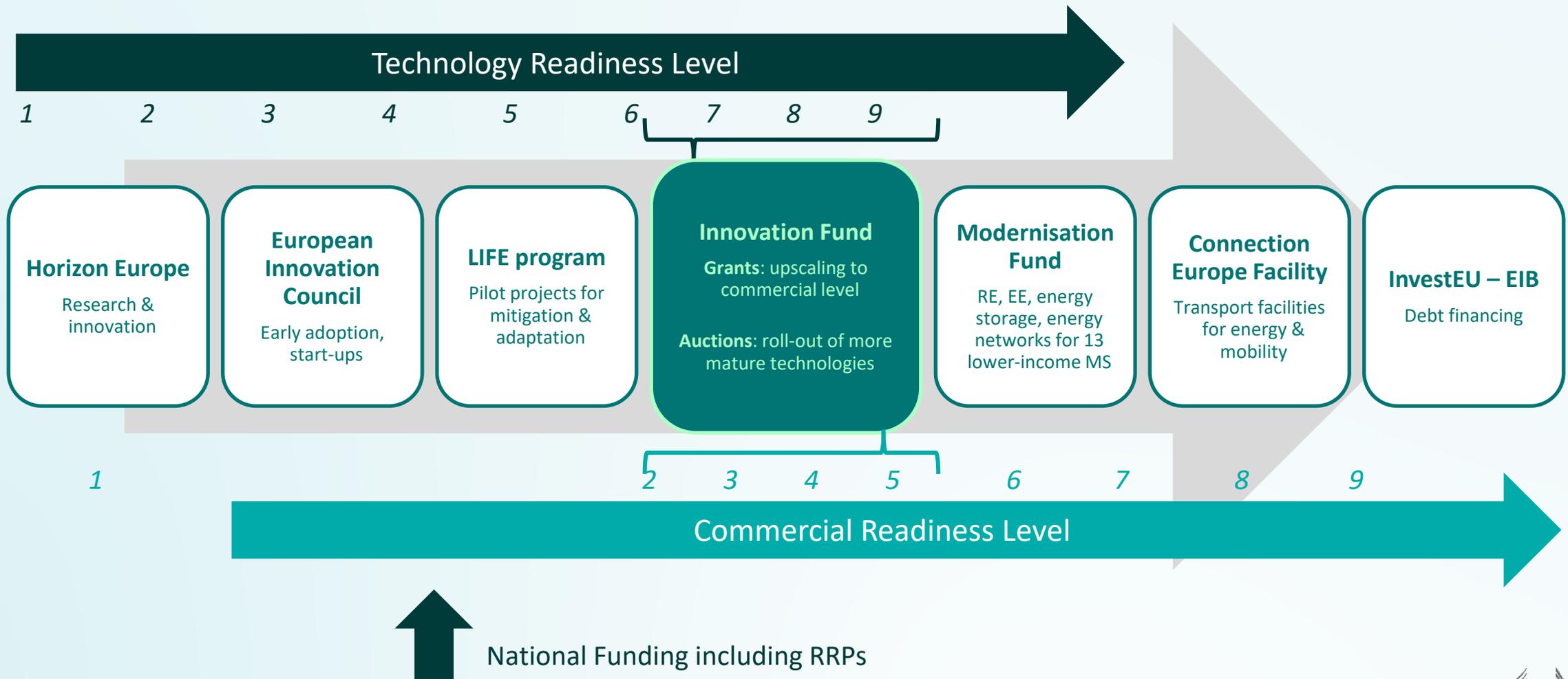
Carbon capture, use and storage



Net-zero mobility and buildings

*based on a carbon price of €75/tonne

A targeted project portfolio



Innovation Fund In a nutshell



217 projects
193 ongoing +
24 under GAP*



>940 Mt CO₂e
to be avoided**
(840 Mt ongoing
+ 100 Mt GAP)



>€12.9 billion
€11.2 billion
allocated +€1.7
billion under GAP
€3.4 billion under
eval.



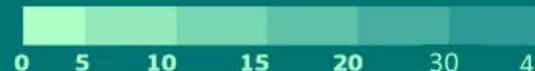
~26ktCO₂e
avoided¹



27
countries



Project location



*Grant Agreement Preparation

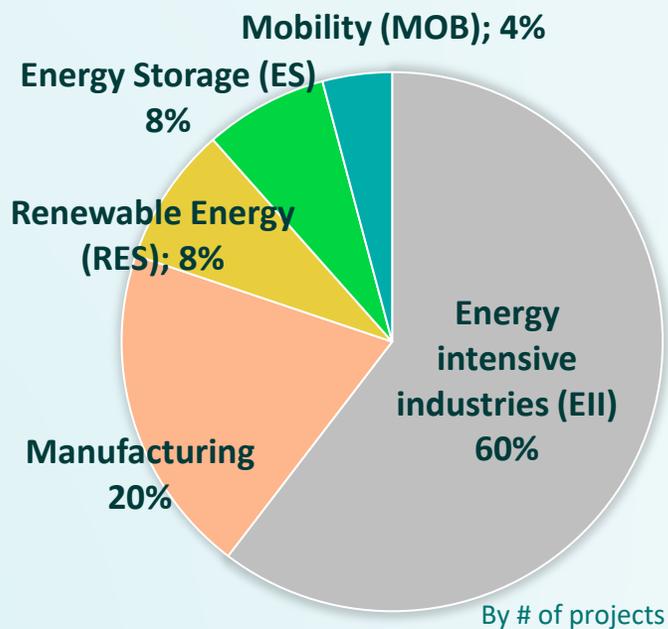
**estimated based on 10 years of operations

¹ Results from the first projects which have passed 1Y of operations

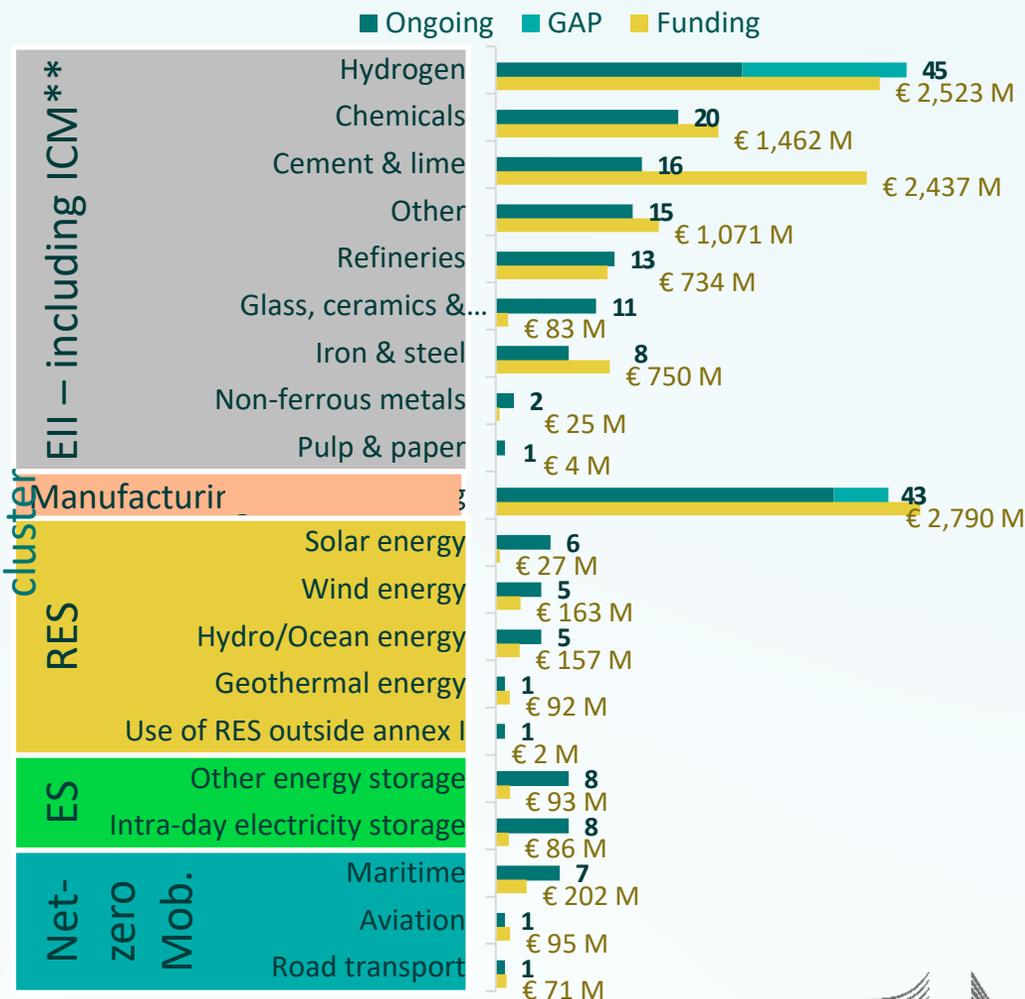
IF Portfolio

Projects ongoing & invited for GAP*

Share of projects by cluster



Projects* & allocated EU budget by sector & cluster



*The overall number of projects includes 193 ongoing projects + 6 IF24-BATT + 18 IF24-RFNBO-H2-AUC invited for GAP. (GAP: Grant Agreement Preparation).

** ICM: Industrial Carbon Management



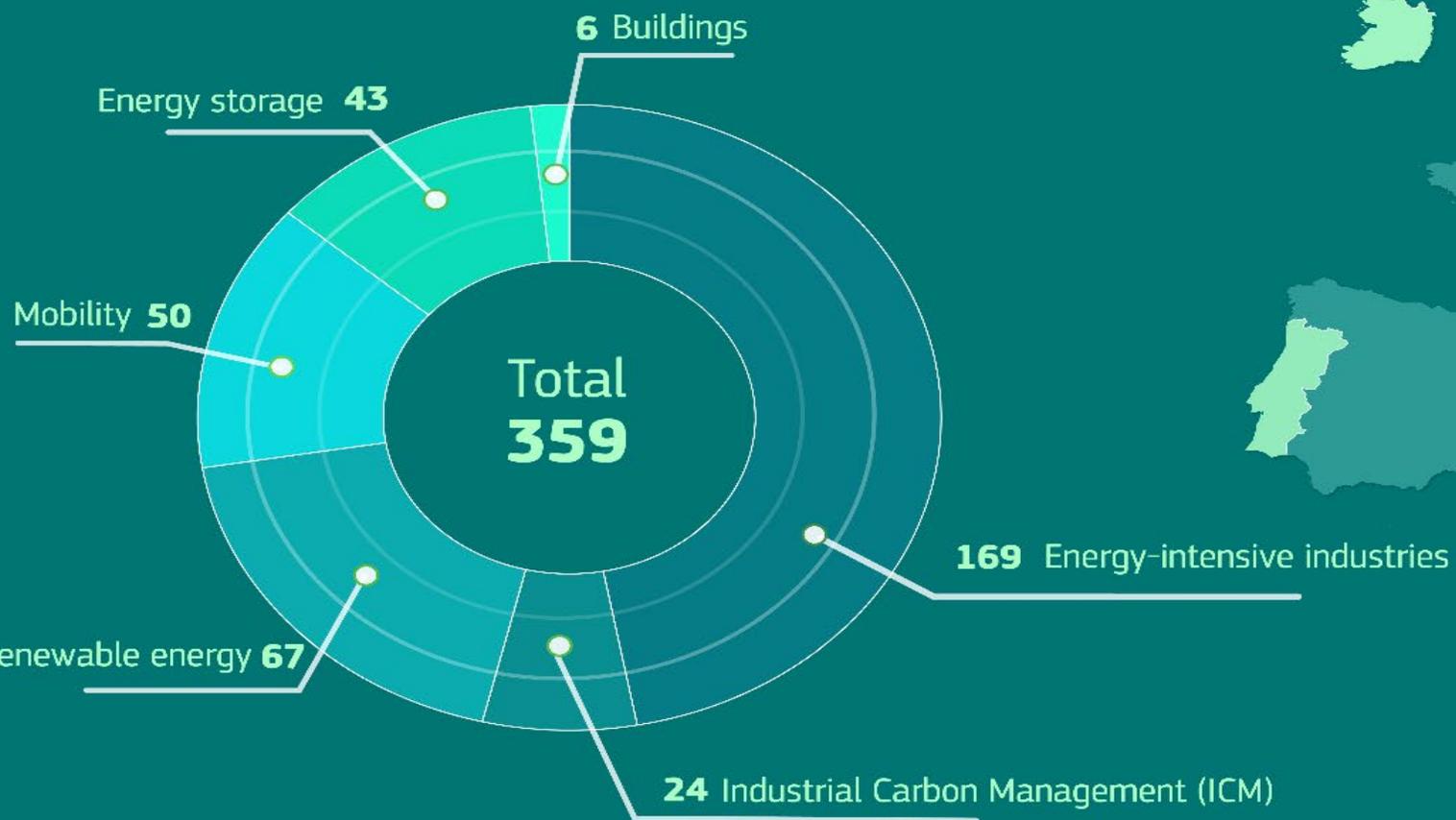
INNOVATION FUND

Funded by the EU Emissions Trading System

Applications to the 2024 Net-Zero Technologies call



Applications per category



Project location



INNOVATION FUND IF24 BATTERY

6 PROJECTS
SELECTED



for electric vehicle
Battery cell
manufacturing

More info:

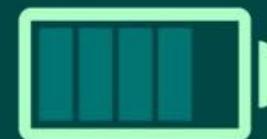
EU invests €852 million in six innovative electric vehicle battery



€ **852** million

Combined annual production capacity

56 GWh*



Total emissions avoided

91 million

tonnes of CO2 over 10 years of operations



* Upon reaching full capacity

Thank you



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