

Advancing Europe's Industrial Competitiveness and Resilience

POSITION PAPER ON THE
INDUSTRIAL ACCELERATOR ACT

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EPICO KlimaInnovation Position Paper on the Industrial Accelerator Act: Advancing Europe's Industrial Competitiveness and Resilience

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KEY RECOMMENDATIONS

- 1) **Clarify Union-origin requirements.** The scope should recognise products from countries with EU free trade agreements as **equivalent to Union content**, subject to appropriate safeguards, while establishing clearer criteria to identify strategic partners.
- 2) **Apply Union-content and low-carbon criteria jointly.** These criteria should be applied together, as proposed, rather than treated as alternatives.
- 3) **Strengthen procurement quotas for low-carbon Industrial materials.** The introduction of low-carbon criteria in public procurement for steel, aluminium and cement is welcome, but the proposed quotas are too low to drive meaningful market change. The proposal should include a clear and binding roadmap to progressively increase these quotas over time to maximise their impact and support industrial decarbonisation.
- 4) **Design Industrial Acceleration Areas as policy sandboxes but with a strategic scope.** These areas should fast-track Europe's transition to clean industrial manufacturing, prevent lock-in of high-emitting technologies, and enable circular industrial solutions that enhance competitiveness and resilience. This should be underpinned by a clearer and more rigorous definition of "strategic activities", with high-emitting inputs such as coke and refined petroleum excluded from that classification.
- 5) **Separating low-carbon steel definitions between the CPR and ESPR may offer a constructive alternative to a 'one-size-fits-all' approach.** EPICO have reservations about adopting a 'modified sliding scale' approach for the ESPR Steel label.
- 6) **Strengthen lead markets under the ESPR.** The Commission should complement public procurement with EU public funding to support low-carbon industrial products such as steel and cement.

INTRODUCTION

EPICO is a Berlin- and Brussels-based think tank, covering climate, energy and industrial policy, which means we follow the debate in the IAA both from a national and a European perspective. EPICO itself favours market-based approaches to industrial, energy and climate policy.

The Industrial Accelerator Act was always planned as a cornerstone of the European Commission's Clean Industrial Deal, announced in February 2025. It therefore serves as an indicator of the Union's capacity to convert strategic ambition into tangible policy tools. The proposal comes at a pivotal juncture for European industry, as the EU works to align its climate commitments with the imperatives of competitiveness, economic security and technological leadership.

We appreciate that the version of the IAA that the Commission has adopted makes substantial efforts to take into account some of criticism levelled against the previous "leak"; particularly, that earlier draft might have gone a step too far in installing a new industrial, raw materials and trade policy regime much closer to state-run economies than the open markets approach that is the backbone of the EU. There is also noticeable effort to align the IAA with NZIA and other recent initiatives – both in terms of the language but also substance.

Creating lead markets for net-zero technologies and low-emission materials is one of the most effective ways to unlock private investment, particularly when these markets are underpinned by binding sustainability criteria and credible demand-side measures. Here, the IAA introduces a highly relevant, if untested, combination of instruments. To build lead markets it goes beyond public procurement to also include other government support schemes in its remit. Moreover, applying union content and low-carbon content at the same time (except for steel) seems, on the face of it, sensible.

Other elements of the IAA do not relate to decarbonization in the narrower sense but focus on strengthening Europe's industrial base. Some of it is very welcome. For example, the establishment of single

digital portals are well-placed to cut red tape. They fit into the European and German simplification agenda and mirror similar provisions in the NZIA. However, it is unclear if and how these provisions can be implemented: They pertain directly to the issue of the organisation of the state, which is a core competency of the member states.

Other parts of the IAA that focus on a more muscular industrial policy remain problematic. For example, foreign direct investment will be subject to prior public authorization, at least in certain areas. This represents a fundamental change from the previous framework that favours open markets and should be carefully considered. Similarly, it remains to be seen if heavy-handed provisions on raw materials that were included in previous “leaks” but are deleted in the version adopted by the College, will be re-inserted during co-decision.

Finally, there are many instances where the draft foresees large decision-making authority concentrated in the Commission, i.e. to put more flesh on the IAA via delegated act. This is understandable from the point of view of being able to quickly come to decisions; on the other hand, it would entail probably the most significant transfer of power on industrial policy to the Commission in recent memory. It remains to be seen whether member states will agree with this.

RECOMMENDATIONS

1) IMPLEMENT A CLEAR PROCESS FOR THE UNION CONTENT REQUIREMENT, AND A MORE TRANSPARENT PROCESS FOR EXCLUDING COUNTRIES AS STRATEGIC PARTNER COUNTRIES TO BE EQUIVALENT TO UNION CONTENT

The introduction of carefully calibrated local content requirements, framed as a “Made with Europe” approach rather than a strictly “Made in Europe” requirement, merits serious consideration as part of a broader strategy to strengthen European industrial resilience. When well designed, such measures can support domestic value chains, stimulate investment in European production capacity, and contribute to the EU’s strategic autonomy while remaining consistent with its wider trade objectives.

In this regard, the Commission’s proposal for the Industrial Accelerator Act (IAA) represents a clear improvement on earlier drafts. It adopts a more balanced and outward-looking approach by recognising that content from certain third countries may qualify as equivalent to Union content under defined conditions. This reflects the reality that European industrial strength is often built on integrated and trusted international value chains.

Importantly, the IAA recognises that third countries can obtain equivalence with Union

content through the conclusion of a Free Trade Agreement (FTA) with the EU. EPICO strongly supports this approach. Treating FTAs as a primary pathway to equivalence provides a clear, rules-based and predictable framework for third countries to engage with the EU. It creates a strong incentive to deepen economic integration while reinforcing the rules-based trading system that underpins EU trade policy. It also avoids sending unclear or inconsistent signals by offering partners a transparent and structured route to participation.

At the same time, EPICO remains concerned about shortcomings in the proposed governance framework. The current approach allows the Commission, through delegated acts, to exclude countries from being treated as equivalent to Union content based on broadly defined criteria. This risks creating an initially inclusive system that permits discretionary and potentially opaque exclusions at a later stage.

Such an approach raises concerns regarding transparency, predictability, and accountability. Decisions to exclude countries can have significant economic and diplomatic consequences and should not rely on vague criteria or ad hoc processes. Leaving these determinations to delegated acts risks undermining legal certainty and may send unreliable signals to international partners and investors.

A more robust framework should establish clear, objective, and publicly defined criteria for both granting and withdrawing equivalence.

Any assessment, whether related to resilience, security or alignment with EU strategic objectives, should follow transparent methodologies and be subject to appropriate oversight. The process for excluding countries should be explicitly set out in the legislative framework, rather than left to discretionary implementation by the Commission.

By anchoring equivalence in FTAs and ensuring a transparent and rules-based governance system, the Union can provide clarity and predictability to third countries while safeguarding its strategic interests. This would strengthen the credibility of the “Made with Europe” approach and ensure that the Union content requirement supports both industrial resilience and open, cooperative trade.

2) APPLY UNION-CONTENT AND LOW-CARBON CRITERIA JOINTLY. THESE CRITERIA SHOULD BE APPLIED TOGETHER, AS PROPOSED, RATHER THAN TREATED AS ALTERNATIVES.

A Union content requirement can play an important role in supporting the European scale-up of strategic clean technologies. However, it should function as a complementary criterion that reinforces other non-price considerations, particularly low-carbon performance. It should not be viewed as a substitute for climate-related criteria.

In this regard, EPICO welcomes that the Commission has moved away from an either-or approach between Union-content requirements and low-carbon performance criteria. Treating these criteria as alternatives would risk weakening the EU’s climate ambitions. Union-content requirements alone do not necessarily guarantee lower emissions performance, and industrial policy objectives should not dilute environmental integrity. The

primary function of Union content measures should therefore be to reinforce and support low-carbon criteria, rather than replace them.

For this reason, it is positive that the proposal clarifies that, where the Annexes specify both Union-content thresholds and low-carbon values for particular products, these criteria should be applied jointly. Earlier versions of the IAA appeared to suggest that contracting authorities could, where necessary, choose between the two. Such an approach would have created the risk that climate considerations could be sidelined in favour of sourcing requirements. The clarification that both criteria should apply simultaneously is therefore a welcome improvement and strengthens the overall coherence of the framework.

With regard to the exclusion of Union-content requirements for steel, the situation of the sector should continue to be closely monitored. The steel industry is currently facing significant pressure from global excess capacity, which poses serious challenges for European producers. It will therefore be important to assess whether existing safeguard measures are sufficient to address these pressures and to protect the competitiveness of the sector.

At the same time, the absence of Union-content requirements for steel highlights the broader challenge that low-carbon criteria alone may not always be sufficient to support local value chains. Additional policy instruments may therefore be required to ensure that the transition to low-carbon production also supports European industrial capacity.

Whether a Union-origin requirement should be introduced for steel should be considered carefully and assessed considering the effectiveness of existing safeguard measures. Safeguards remain among the strongest trade defense instruments available, and

their impact on the sector should first be fully evaluated. The issue has already attracted significant political attention, which further underlines the importance of approaching any additional measures in a balanced and evidence-based manner.

3) ESTABLISH A CLEAR, BINDING ROADMAP TO PROGRESSIVELY RAISE QUOTAS FOR LOW-CARBON INDUSTRIAL PRODUCTS SUCH AS STEEL, CEMENT AND ALUMINIUM, TO DRIVE INDUSTRIAL DECARBONISATION AND CREATING MEANINGFUL DEMAND FOR LOW-CARBON MATERIALS.

To strengthen the competitiveness of Europe's industrial base, the EU must send a clear and credible market signal. Public procurement is an important lever, but in its current form it is not strong enough. Demand-side policies are essential to unlock Final Investment Decisions, yet they only work if companies can rely on sufficient, predictable and long-term support. Without clear alignment between demand creation and financial backing, industrial decarbonisation will stall or shift outside Europe.

We therefore support the provisions in the IAA that link robust low-carbon criteria for energy-intensive products such as steel, aluminium and cement to procurement. However, the proposed quotas of 25% for steel, 5% for cement and 25% for aluminium are too low to function as effective market signals. At these levels, they will not provide the certainty required to drive large-scale investment.

The cost challenge is real. Early movers face significant green premiums. Hydrogen-based steel, low-carbon cement and clean aluminium involve substantially higher capital and

operating costs than conventional production. This makes strong, stable and sizeable demand indispensable. The Commission should not dilute ambition in response to high upfront costs. Public investment at this stage is the most effective way to create durable market demand and to secure Europe's industrial base. Delaying or underinvesting now will weaken competitiveness in the future.

This challenge is particularly acute in the steel sector. A number of hydrogen-based direct reduced iron (H₂-DRI) projects are progressing across Europe, led by companies including Tata Steel, Salzgitter AG, Thyssenkrupp Steel Europe, Stegra, SSAB, Saarstahl and Hydnum Steel. These projects are strategically important but highly capital-intensive and exposed to market uncertainty.

EMISSION INTENSITY OF STEEL PRODUCTION ROUTES		
The Blast Furnace–Basic Oxygen Furnace (BF–BOF)	Conventional steelmaking route, using iron ore, coal, and limestone to produce hot metal that is refined into steel in a basic oxygen furnace.	1.8–2.2 tonnes of CO ₂ per tonne of Crude steel
Natural Gas–Direct Reduced Iron with Electric Arc Furnace (NG–DRI–EAF)	Lower-emission steelmaking route in which natural gas serves as the reducing agent to convert iron ore into DRI. The DRI is then melted and refined in an EAF.	1.1–1.3 tonnes of CO ₂ per tonne of Crude steel
Hydrogen–Direct Reduced Iron with Electric Arc Furnace (H₂–DRI–EAF)	A low-carbon steelmaking route in which hydrogen replaces coal as the reducing agent to convert iron ore into DRI. The DRI is then melted and refined in an EAF.	0.1–0.4 tonnes of CO ₂ per tonne of Crude steel

Source: <https://discoveryalert.com.au/green-hydrogen-steel-production-2026-decarbonisation>

Hydrogen-based direct reduction can require three to four times the investment of conventional electric arc furnace upgrades, with significantly higher operating costs. Without strong demand signals and targeted support, investment decisions will be delayed, scaled back or relocated. Maintaining momentum is essential to preserve credibility in Europe’s industrial transition.

Public procurement can be a powerful demand driver, but only if applied comprehensively. For example, In Germany, the special investment fund ‘Sondervermögen’ could raise public construction steel demand to 3.7 million tonnes, more than 11 percent of national consumption. **If fully sourced under stringent low-carbon criteria, this could reduce emissions by 2.45 million tonnes of CO₂ annually at an additional cost of up to €228 million per year. This is a manageable premium relative to the climate**

and industrial benefits.¹

Partial quotas weaken this potential. Limiting low-carbon steel to 25% of procurement, and cement to just 5%, dilutes the signal, reduces market certainty and undermines the investment case for capital-intensive transformation. Quotas must be set at levels that materially shift aggregate demand and justify multi-billion-euro investments.

The direction of travel is right, but the level of ambition is insufficient. If Europe wants a competitive low-carbon industrial base, it must ensure that demand signals are strong enough to be credible and backed by funding that is sufficient to make them bankable.

¹[Grüne Leitmärkte: Potenziale des Sondervermögens – EPICO – Energy and Climate Policy and Innovation Council](#)

4) INDUSTRIAL ACCELERATION AREAS SHOULD GO BEYOND STREAMLINING PERMITTING AND FUNCTION AS POLICY SANDBOXES, ENABLING THE DESIGN, TESTING AND SCALING OF CIRCULAR INDUSTRIAL SOLUTIONS TO ACCELERATE EUROPE'S INDUSTRIAL TRANSFORMATION AND STRENGTHEN RESILIENCE.

Industrial Acceleration Areas should be designed as instruments of structural transformation, not merely as tools to speed up permitting. Each Member State should designate at least one such area to cluster industrial activity and create genuinely favourable conditions for the industries of the future. Permitting simplification should support this goal, but it should not be the only lever.

The core purpose of these areas should be to act as policy sandboxes for Europe's industrial transition. They should provide a structured environment to test and scale circular industrial solutions, enable industrial symbiosis and support cross-sector integration. By operating at a testing scale, they can de-risk innovative approaches and accelerate their deployment across the EU.

While the current framework identifies relevant criteria, such as access to low-carbon energy, secondary materials, infrastructure and skills, these remain non-binding. Member States are only asked to take them into account where relevant, which risks sidelining them in practice. As a result, traditional site selection factors such as existing infrastructure and labour availability are likely to dominate, limiting the ability of these areas to drive genuine transformation.

There are also clear inconsistencies in the definition of "strategic" activities. Recycling and

secondary material industries are excluded, while high-carbon sectors such as petroleum refining and coke production are included. This assigns strategic status to the wrong industrial activities if the objective is to strengthen Europe's long-term competitiveness. Recycling is not a peripheral activity; it is a central pillar of industrial decarbonisation and resource security and should be integral to industrial cluster design. Without recognising it as strategic, the framework risks overlooking one of the most effective levers for reducing emissions in energy-intensive industries.

At the same time, including high-carbon activities without clear transition conditions risks locking in fossil-dependent production. Industrial Acceleration Areas should instead prioritise activities that directly contribute to decarbonisation and circularity.

To address this, circularity should be made a core organising principle. These areas should explicitly support industrial symbiosis, the use of secondary raw materials and the integration of renewable energy, hydrogen and carbon management infrastructure. Ensuring reliable access to strategic secondary materials, such as steel, aluminium, copper and battery materials, should be a key feature. This could include targeted mechanisms to prioritise access within these areas, carefully designed to avoid market distortions while strengthening domestic value creation. Streamlined permitting remains important, particularly for accelerating the deployment of low-emission technologies. However, it should be treated as an enabler of industrial transformation, not as an end in itself.

If properly designed, Industrial Acceleration Areas can go beyond facilitating individual projects. They can create integrated and efficient industrial ecosystems that strengthen Europe's competitiveness and resilience. A key step is to revise the scope of what is considered a strategic sector so that it better reflects

long-term economic priorities, supply security and the industries that will underpin Europe’s future growth.

5) THE CURRENT APPROACH OF DIFFERENTIATING LOW-CARBON STEEL DEFINITIONS BETWEEN THE CPR AND THE ESPR MAY OFFER A CONSTRUCTIVE ALTERNATIVE TO A ONE-SIZE-FITS-ALL MODEL. HOWEVER, WITH REGARD TO THE ESPR, WE HAVE RESERVATIONS ABOUT THE POTENTIAL USE OF A “MODIFIED SLIDING SCALE APPROACH”.

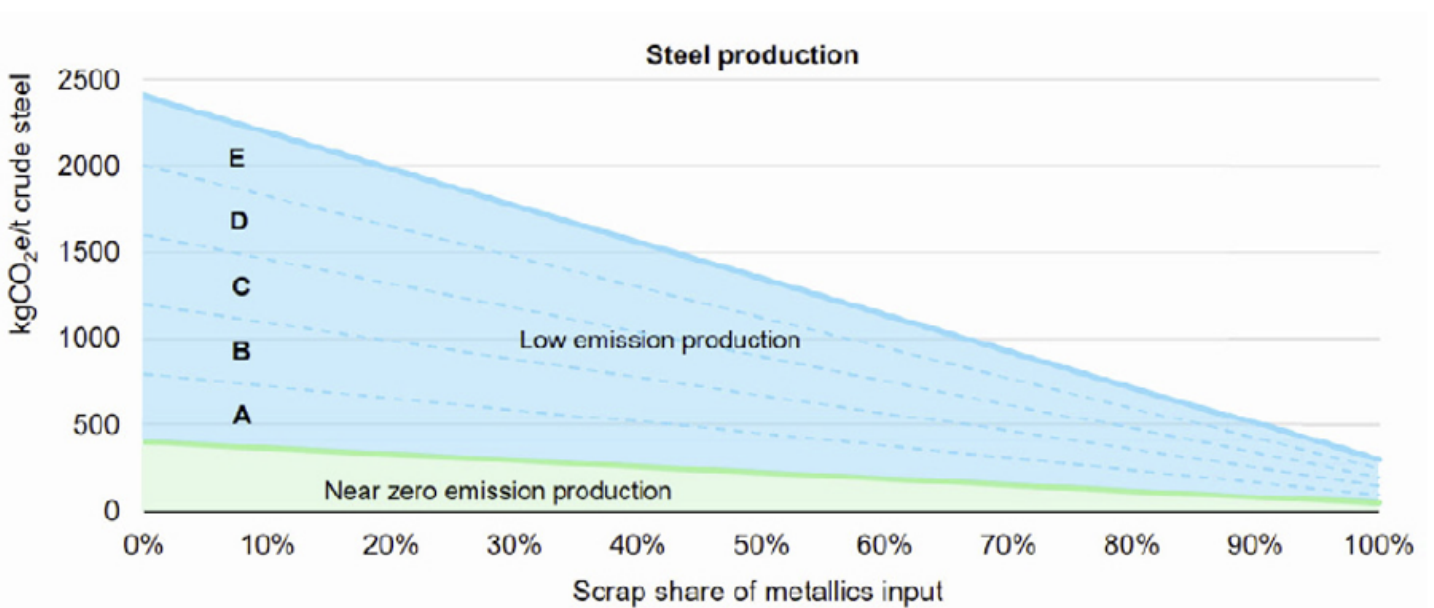
A clear and robust definition of low-carbon steel is a necessary first step for the development of credible lead markets. Significant groundwork for a steel label was undertaken under the Industrial Accelerator Act (IAA), but it was ultimately not carried forward in

the final proposal. This has resulted in further delays in establishing a harmonised standard for clean steel and in developing lead markets for low-carbon steel.

In principle, **differentiating low-carbon steel definitions between the Construction Product Regulation and the Eco-design Sustainable Product Regulation could be a workable approach. However, there is still considerable uncertainty regarding the final scope, alignment and practical implementation across both frameworks.**

For the development of an EU-wide voluntary label for steel, the Commission has previously identified the Low Emission Steel Standard (LESS) label as its preferred option. While EPICO has raised concerns about applying this approach as a one-size-fits-all across all production pathways, the sliding scale design has clear strengths, particularly in its ability to capture the high green premium associated with the decarbonisation of primary flat steel production.

Figure 1: Low-Emission-Steel-Standard (LESS), sliding scale approach, illustrating adjusted benchmark values according to the scrap input.



EPICO considers it appropriate that a label focuses primarily on flat steel products. Decarbonising primary flat steel production carries the highest cost and requires strong demand signals to support deep decarbonisation of ironmaking processes. By contrast, for long steel products, particularly in the

construction sector, well-established life cycle assessments and Environmental Product Declarations are already widely used to assess sustainability performance. The CPR could provide an appropriate framework for procurement decisions in this segment.

Long steel and flat steel are different mainly in shape, production method, and use.

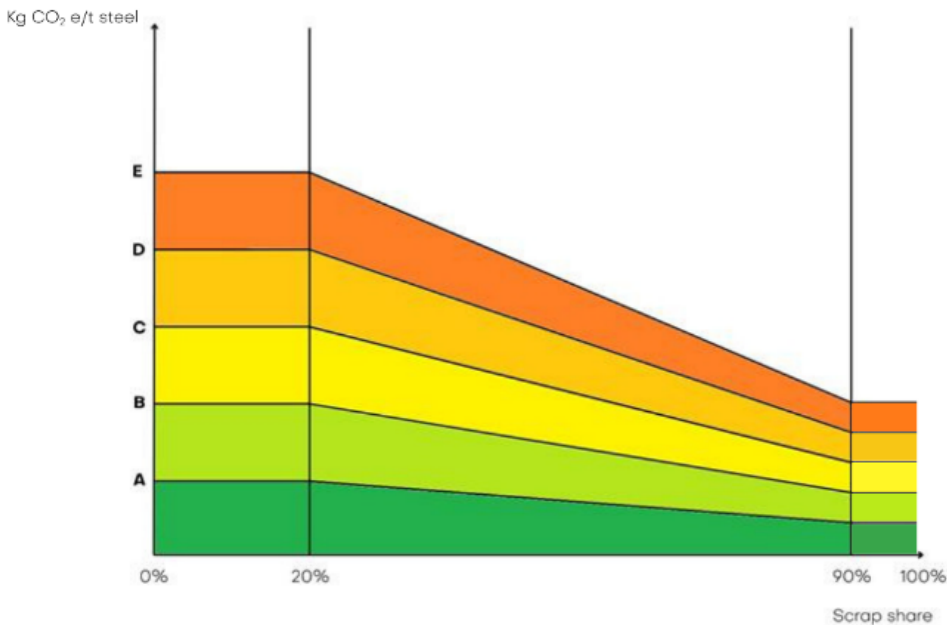
- Long steel products are made into long, straight shapes such as rebars, beams, rods, bars, wire, and rails. They are mainly used in construction. For example, rebar is placed inside concrete to make it stronger and prevent cracking, while beams, columns, and girders form the main support structure of buildings, bridges, and factories.
- Flat steel products are made by rolling steel into thin, flat sheets. These sheets are usually rolled into coils and then cut or processed into sheets, strips, or thicker plates. Thin sheets are flexible and used in products like cars and home appliances. Thicker plates are stronger and used for heavy-duty structures like ships and wind turbines.

We therefore **welcome the direction under the Industrial Accelerator Act to amend both the ESPR and the CPR in order to define low-carbon steel for procurement across different product scopes**. This would allow construction steel, which typically contains high shares of scrap input, to be assessed through LCA-based approaches, while the steel label in a delegated act under the ESPR would focus on more on primary flat production. This would support the development of a targeted signal for deep decarbonisation of ironmaking, while maintaining established methodologies for secondary steel.

However, we remain concerned about the previously leaked design of the IAA's modified sliding scale. This proposal introduces performance categories that adjust for scrap input only between 20 per cent and 90 per cent, while applying horizontal lines at 0 to 20 per cent and 90 to 100 per cent where no adjustment to scrap input is made (see Figure

2). Although, this was opted out of the IAA itself, if this is any indication for what the Commission has in mind for the steel label under the ESPR, we want to address the potential impact of this design.

Figure 2: IAA label envisioned by EPICO, illustrating a sliding scale approach between 20–90% metallic scrap input



Horizontal lines at very high scrap levels (e.g. 90–100%) is reasonable: they safeguard some of the climate value of near-maximal scrap use and avoid penalising circular production models.

In these leaked draft proposals, there were also horizontal bands from 0 to 20% scrap share. The logic behind this proposal is partly technical: in conventional blast furnace–basic oxygen furnace (BF–BOF) steelmaking, scrap is often used as a coolant. Around 20% scrap is typically added to [absorb excess heat](#) and keep furnace temperatures within the operating range of roughly 1600–1650 °C. From this perspective, it could be sensible to present horizontal lines up until this threshold, because it is a practical base usage and not directly for any sustainable benefit.

Still, we remain cautious about the implications of this design. **Introducing horizontal lines between 0% and 20% scrap content could risk weakening the ambition of the standard. It may blur the distinction between fundamentally different production routes and reward**

marginal optimisation within coal-based steel-making rather than incentivising the structural transformation the sector requires.

This is because conventional blast furnace–basic oxygen furnace (BF–BOF) routes can typically absorb only around 15–25% scrap without significant technical modification. In a BF–BOF system, each tonne of scrap used instead of iron ore can avoid roughly [1.5 tonnes of CO₂](#). Assuming an average emissions intensity of around 2.2 t CO₂ per tonne of steel, a 20% scrap share would reduce emissions by approximately 0.3 t CO₂ per tonne of steel, bringing total emissions down to around 1.9 t CO₂ per tonne.²

With this, a BF–BOF installation could combine some scrap input of up to 20%, together with other marginal optimisation measures, such as relining, incremental efficiency upgrades or carbon capture and Storage (CCS) measures and thereby move into a higher performance category on the Steel label, despite continuing to rely on coal as the primary reductant.

² Estimated by multiplying the scrap input share by the average emissions avoided per tonne of scrap substituted for iron ore in a BF–BOF route: $0.20 \times 1.5 \text{ t CO}_2/\text{t} = 0.30 \text{ t CO}_2$ avoided per tonne of steel.

This raises a risk of slowing the structural transition away from coal-based steelmaking. While relining and other technical upgrades may reduce emissions at the margin, they can also extend the operational lifetime of BF-BOF assets. In doing so, they may effectively delay phase-out decisions and reinforce carbon-intensive infrastructure, rather than enabling a shift toward low-carbon primary steel production. A label design should avoid reinforcing such lock-in effect.

For these reasons, **EPICO would recommend reconsidering this element of the methodology. In the context of a delegated act under the ESPR, the introduction of horizontal lines within a 0–20% scrap range risks weakening the integrity of the label and generating unintended signalling effects for investors.**

6) STRENGTHEN LEAD MARKETS UNDER THE ESPR BY COMPLEMENTING PUBLIC PROCUREMENT WITH EU PUBLIC FUNDING TO SUPPORT LOW-CARBON INDUSTRIAL PRODUCTS SUCH AS STEEL AND CEMENT.

Although procurement is one lever to support demand for clean industrial products, the current approach falls short of what is needed to build credible lead markets. Earlier drafts of the Industrial Action Agenda correctly recognised a key limitation: public procurement on its own cannot create strong and durable lead markets for low-carbon materials such as steel and cement. Those drafts proposed complementing procurement with EU public funding to support deployment and uptake. This essential element has since been removed. At the same time, the proposed voluntary low-carbon steel label was dropped, further weakening the overall approach. Although a steel label will still be developed under the Ecodesign for Sustainable Products Regulation through a delegated act,

the broader strategy to build lead markets has been diluted.

This is a clear missed opportunity. If the EU is serious about accelerating industrial decarbonisation, it must match its regulatory ambition with financial support. Public procurement can stimulate initial demand, particularly in construction and infrastructure, but it cannot on its own deliver the scale, speed, or certainty required to transform markets. Without additional support, demand will remain too limited and fragmented to unlock large-scale investment in low-carbon production.

EU funding is the missing piece. Well-designed financial instruments can close the cost gap between conventional and low-carbon products, de-risk early investments, and create predictable demand signals. Innovation funds, industrial transition mechanisms, and other EU-level programmes should be explicitly aligned with ESPR objectives to support the uptake of low-carbon materials across key value chains. This is not optional. It is necessary to make lead markets credible and effective.

Reintroducing EU public funding as a core pillar alongside procurement would significantly strengthen the ESPR framework. It would demonstrate that the EU is prepared to back its climate and industrial goals with concrete action. It would also send a clear signal to industry, investors, and international partners that Europe is committed to scaling low-carbon production and maintaining its global competitiveness.

Relying on procurement alone risks undermining that message. Combining procurement with targeted EU funding would provide the scale, certainty, and credibility needed to drive real market transformation. The Commission should therefore restore this approach and ensure that lead markets for low-carbon industrial products are supported by both demand-side measures and robust financial backing.

ABOUT US

EPICO KlimalInnovation is an independent think tank that advances constructive, market-based, and innovation driven climate and energy policies through clear concepts and viable, balanced solutions. We create a network that brings together key stakeholders in climate and energy policy to establish and implement a socially broad-based agenda. We provide a platform for actors from politics, business, science, and civil society to engage, consult, contribute, and advance solution-oriented approaches.

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