

# Hydrogen Valleys Facility

Unlocking transformative support for Hydrogen Valleys on their way to FID

24 June 2025, 16:30–17:45



Roland  
Berger

# Hydrogen Valleys have become a key pillar of Europe's emerging clean hydrogen sector – The Clean Hydrogen JU has been spearheading the initiative

The Clean Hydrogen Partnership's success story of Hydrogen Valleys

2018

## Igniting the Hydrogen Valleys

The idea of European “**Hydrogen Valleys**” is born



2019-2021

## Launching the H2V Platform

**H2V Platform officially kicked off**, with **30+ Hydrogen Valleys** featured and **funding of first Hydrogen Valleys**



2022-2024

## Accelerating the ramp-up

**Platform relaunched** with **90+ Hydrogen Valleys** featured and so far, **21 projects** with funding of **>EUR 250 m supported**



2025+

## Navigating beyond

Set-up of a tailored **Hydrogen Valleys Facility**



# At the beginning of June, the Clean Hydrogen Partnership conducted a market consultation survey on the key challenges and needs of H<sub>2</sub> project developers

## Market consultation survey

### Survey fundamentals



Hydrogen project developers



- Current **H<sub>2</sub> market sentiment**
- Tailoring the **future support** of the H2V Facility



c. 50 respondents



May 28 - June 13 2025

### Survey structure

Initial insights  
presented today



General information on the H<sub>2</sub> project



H<sub>2</sub> market, challenges and needs



Support by CHP for H<sub>2</sub> project development



# H<sub>2</sub> project developers consider support by the Clean Hydrogen Partnership in commercial and regulatory aspects as most relevant

Key results regarding support by the Clean Hydrogen Partnership for H<sub>2</sub> project development



## Specific support areas for H<sub>2</sub> project development by the Clean Hydrogen Partnership



### Commercial



**Offtake strategy**

72%

**Market & demand assessment**

51%

**Financial planning & investment strategies**

41%

### Regulatory



**Permitting support**

67%

**Policy advocacy & support**

62%

**Guidance on regulatory compliance**

50%

### Technical



**CAPEX, OPEX analysis**

50%

**Hazard & risk review**

36%

**Logistics (handling, storage, distribution)**

26%

### Valley governance



**Partnership assessment**

41%

**Project governance**

33%

**Project and milestone planning**

18%

% Percentage of total responses



# The sharing of best practices, ready-to-use tools and guidelines seem furthermore most beneficial for H<sub>2</sub> project development

Key results regarding general support by the Clean Hydrogen Partnership



## Resources and materials



Ready-to-use **tools and templates**

69%



**Guidelines** on latest industry standards & best practices

67%



Topic-specific **dossiers**

41%

## Formats



Sharing of **best practices**

74%



Online **workshops** & informative sessions

54%



**Individualised trainings** for capacity building

36%



**Q&A sessions**

33%

% Percentage of total responses



# The H2V Facility addresses the support needs in the market with the aspiration of 50 Hydrogen Valleys operational or under construction in the EU by 2030

## The Hydrogen Valleys Facility

### State as of 2025

65

EU Hydrogen Valleys  
on the  
H2V Platform



14

EU Hydrogen Valleys on  
the H2V Platform  
**operational/  
under construction**



### Dedicated support via the Hydrogen Valleys Facility

by



1



Project  
Development  
Assistance

2



H2V Knowledge  
Portal

3



H2V Platform

Delivery  
partners

Roland  
Berger



worley

Inycom

As per the 2024 European  
Commission Roadmap for  
Hydrogen Valleys

Aspirational target

2030

50

Hydrogen Valleys  
operational/under  
construction

within the EU



# Roland Berger is a leading strategy consulting firm with strong expertise in clean tech and hydrogen project development

Roland Berger capabilities and expertise

Roland  
Berger



## A strong global team

30+ hydrogen partners and principals, 50+ consultants



## True thought leadership

across the New Hydrogen Economy, 20+ publications in the last 2 years



## Proprietary market intelligence

Ready-to-use toolbox and knowledge base

1



Shaping hydrogen policy

2



Producing and transporting hydrogen

3



Industrializing hydrogen technologies

4



Decarbonizing industry and mobility with clean hydrogen

5



Investing in hydrogen ventures

More than

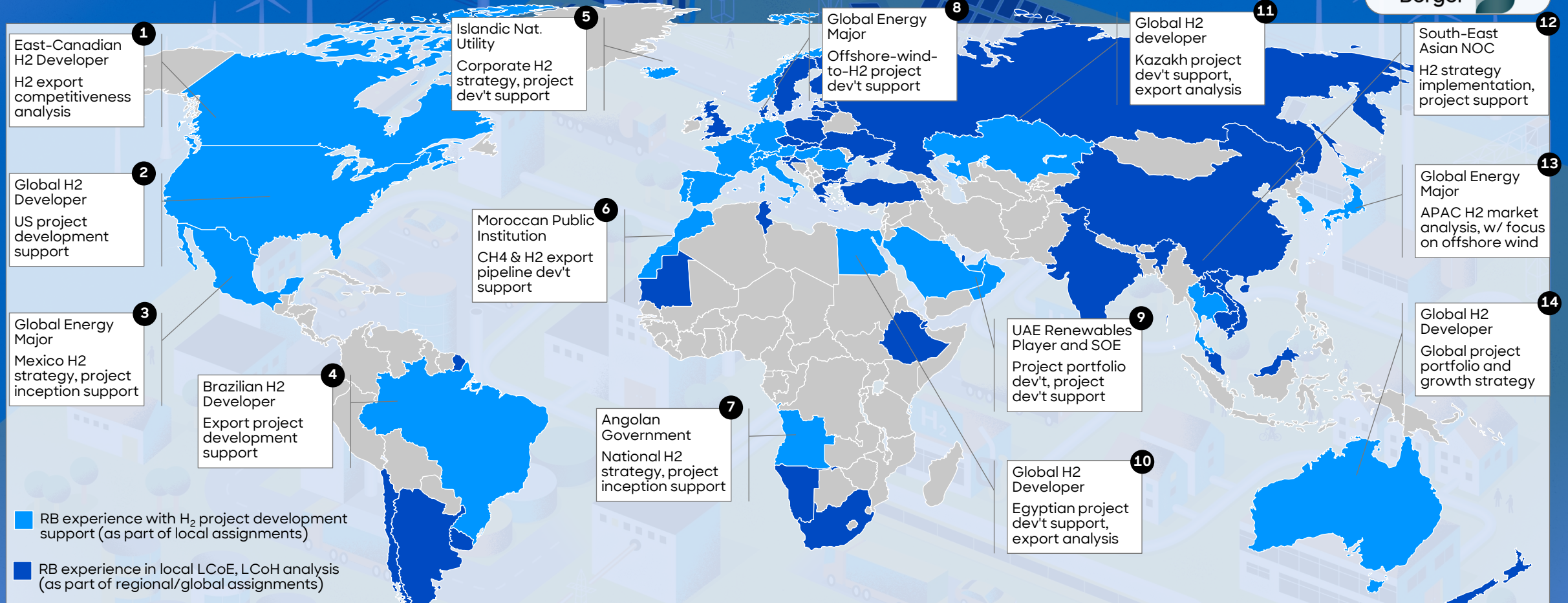
 250

projects  
since 2020



# Around the world, we help to develop green H<sub>2</sub> projects from early-stage ideas to bankable projects and understand the project economics

## Roland Berger credentials



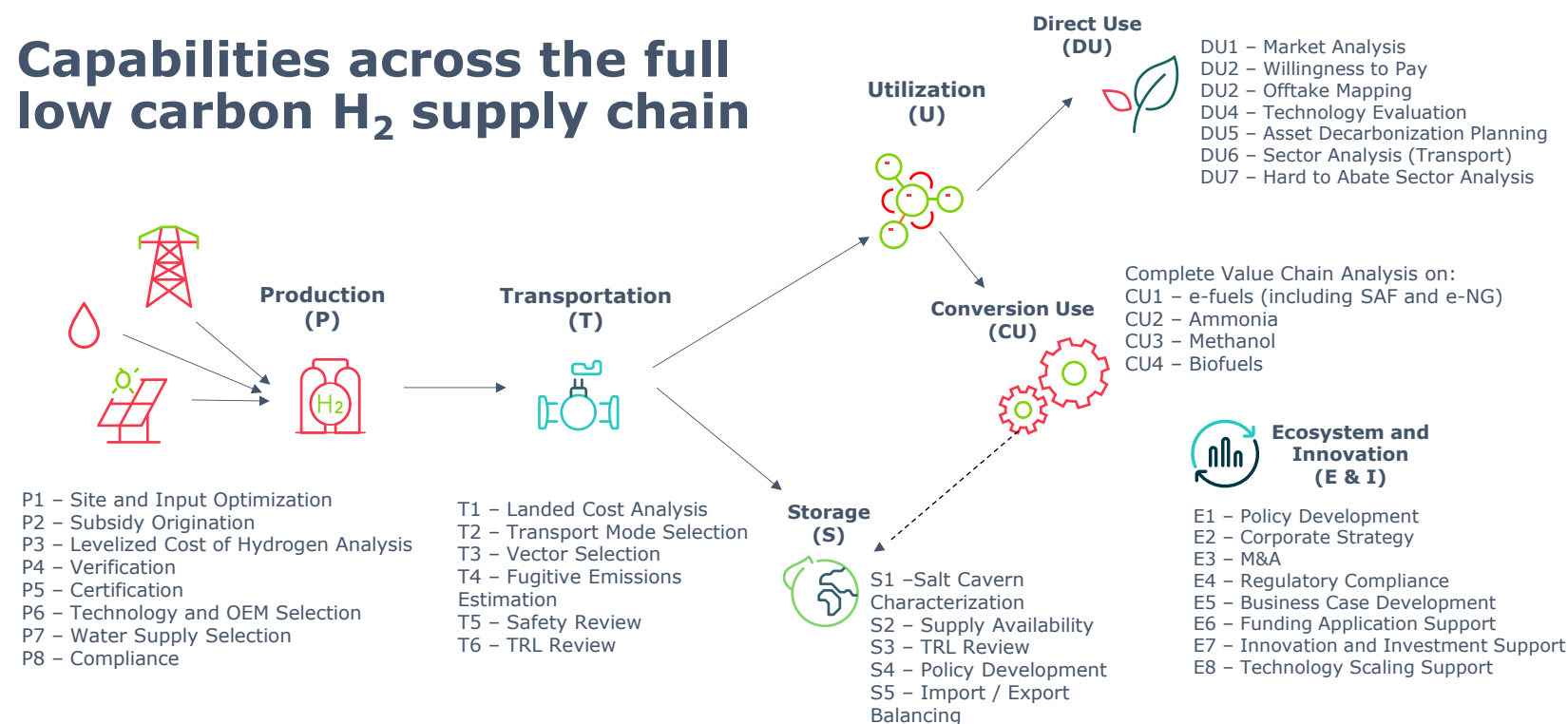


# Worley is a leading global provider of technical services related to hydrogen with a strong reputation in resource and infrastructure project development

Worley capabilities and expertise



## Capabilities across the full low carbon H<sub>2</sub> supply chain

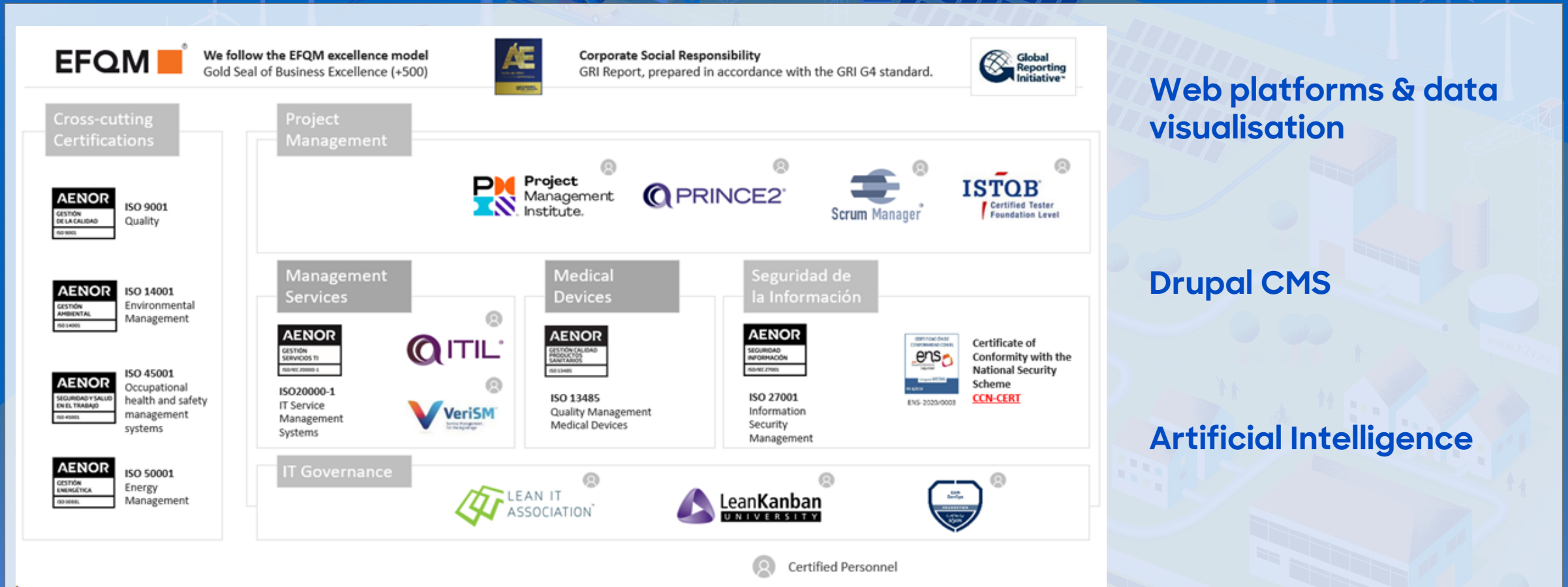


100+

hydrogen projects,  
supporting various  
customers in their projects

# Inycom is a global IT company with over 40 years of experience in value-added technological solutions and services

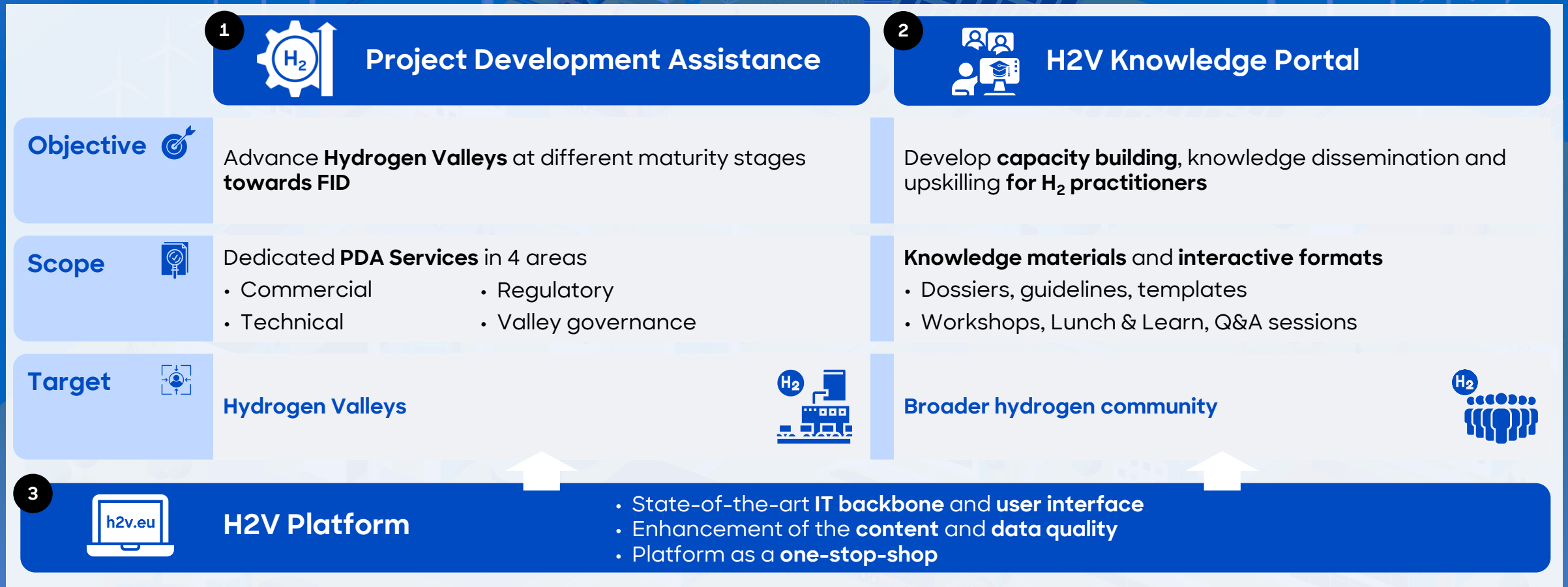
Inycom capabilities, expertise and credentials





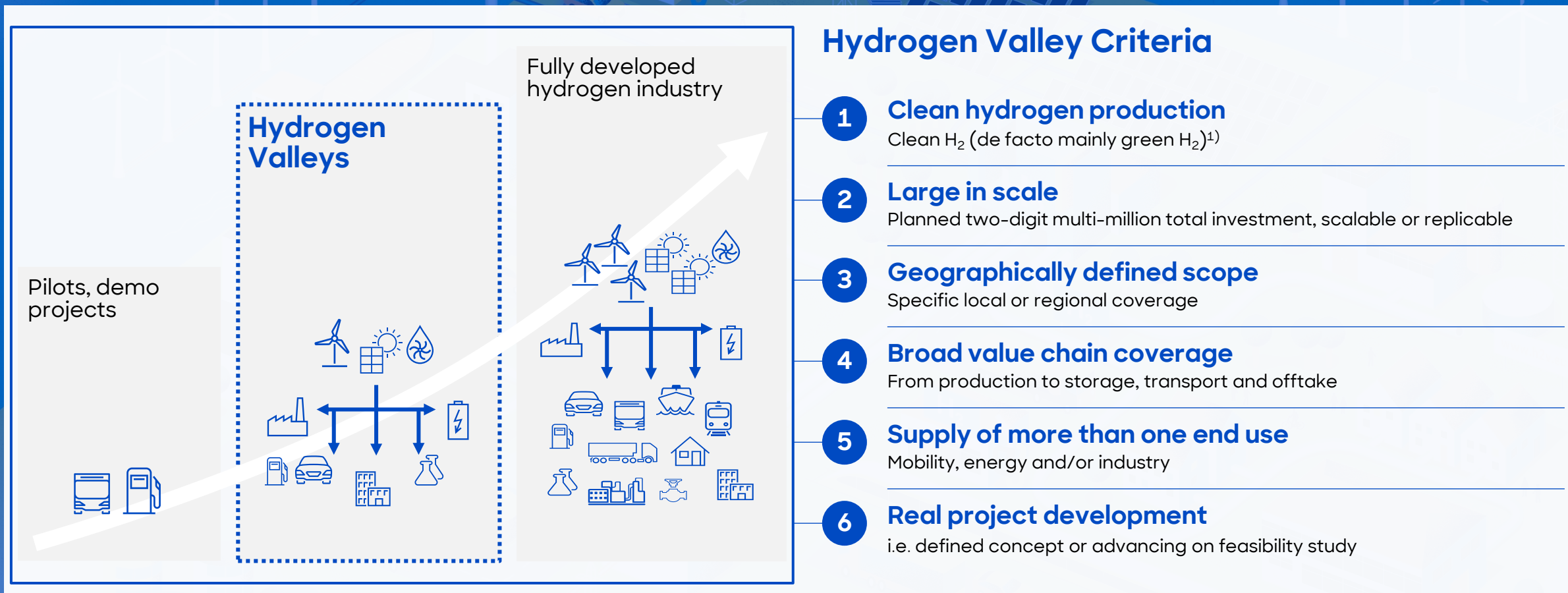
# The Facility will support individual Hydrogen Valleys via dedicated PDA support, and the broader hydrogen community via tailored knowledge formats

## Objectives and scope of the Hydrogen Valleys Facility



# As Hydrogen Valleys, you are at the forefront of building Europe's hydrogen industry, developing integrated clean hydrogen projects along the full value chain

## Definition and criteria of Hydrogen Valleys



1) As defined in the SRIA of the Clean Hydrogen Partnership, clean hydrogen refers to renewable hydrogen, i.e. either electricity-based hydrogen produced through the electrolysis of water and with the electricity stemming from renewable sources or through the reforming of biogas or biochemical conversion of biomass.



# With the Project Development Assistance, the H2V Facility supports Hydrogen Valleys to mature towards feasibility stage and Final Investment Decision

PDA light and PDA plus programmes

First call this year for up to 15 projects

## Project Development Assistance (PDA)

 **Key objective**

**Advance** Hydrogen Valleys towards **FID**

 **Target audience**

Hydrogen projects meeting the 6 **Hydrogen Valley** criteria

 **Target countries**

**EU member states** and countries associated to **Horizon Europe**



up to **40** (2025-2027)



### PDA light

**Idea stage**

**Concept stage**

Ready to move towards feasibility, then FID

**6 weeks**



**Project status at start**



**Project status at end**



**Programme duration**



### PDA plus

**Concept stage**

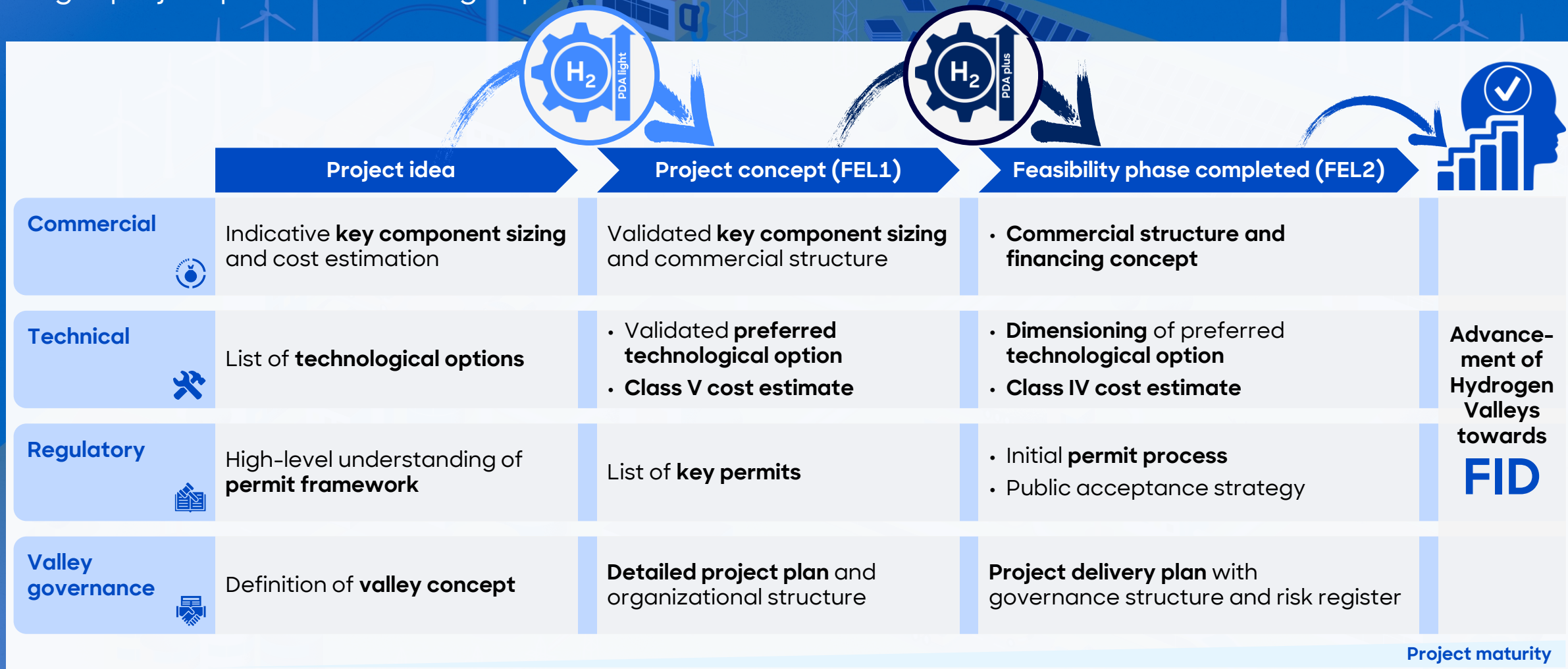
**Feasibility stage**

Ready to apply for European funding, then reach FID

**12 weeks**

# The PDA support aims to advance Hydrogen Valleys from project idea to project concept (PDA light) and from project concept to feasibility (PDA plus)

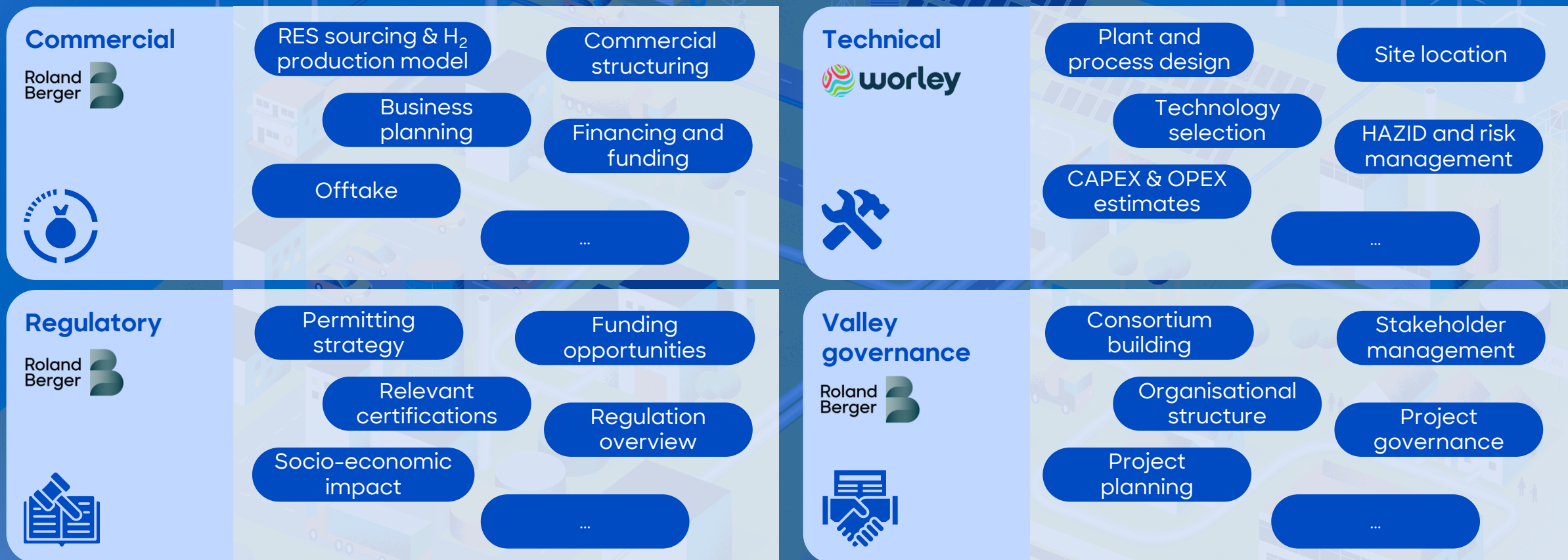
Target project phases for PDA light/plus





# The PDAs aim to advance the valleys in the four dimensions commercial, technical, regulatory and valley governance

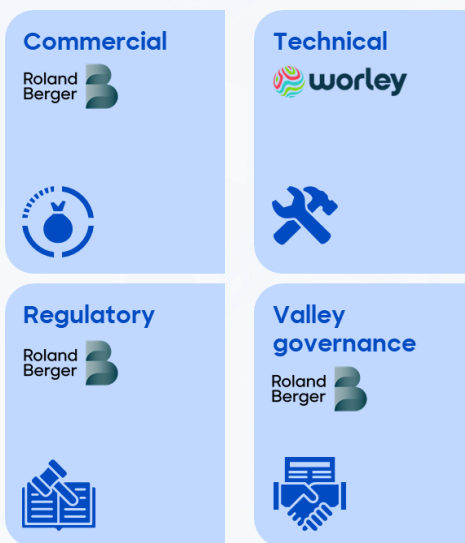
## Selected PDA dimensions



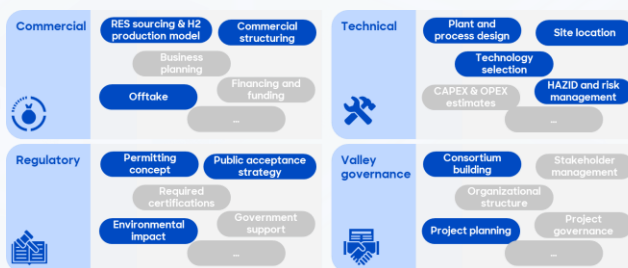
# Each 12-week PDA plus will be tailored to the specific needs of the Hydrogen Valley based on joint prioritization

PDA plus delivery

## Analyse gaps and areas for improvement need



## Select focus support areas



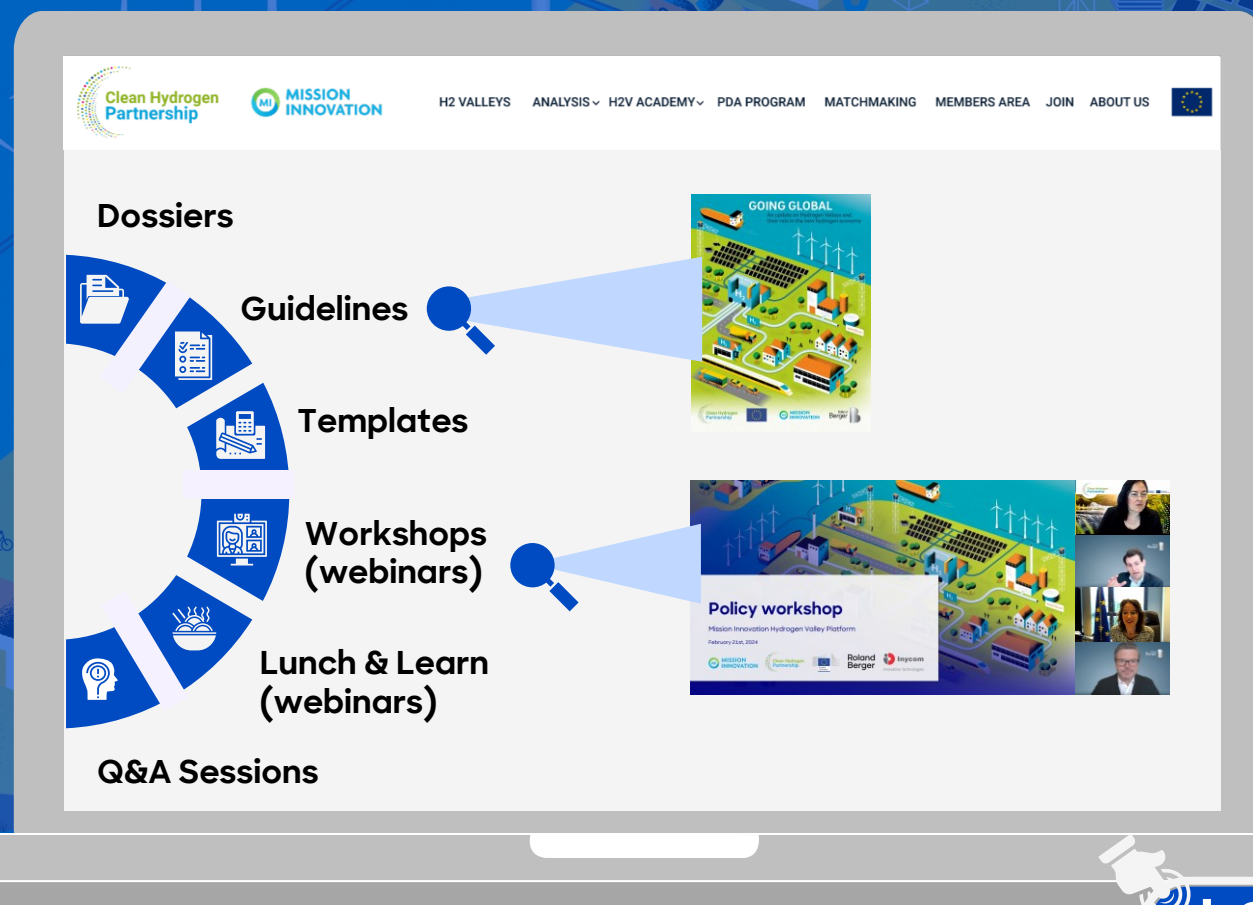
## Align on PDA plus delivery plan





# The H2V Knowledge Portal will provide the broader hydrogen community with tailored knowledge products and interactive learning and exchange formats

H2V Knowledge Portal



Hydrogen practitioners will soon find a **wide range of knowledge materials**

... and furthermore use dedicated **exchange** formats



[h2v.eu](https://h2v.eu)



# The H2V Platform is a powerful tool that helps Hydrogen Valleys showcase their latest progress, benchmark against peers and connect with key stakeholders

H2V Platform



Reminder: **2025 Data Update**

[h2v.eu/user/login](https://h2v.eu/user/login)

**Clean Hydrogen Partnership** **MISSION INNOVATION** H2 VALLEYS ANALYSIS H2V ACADEMY PDA PROGRAM MATCHMAKING MEMBERS AREA JOIN ABOUT US

## How can you benefit?

- Showcase & shine**
- Benchmark & learn**  

ANALYSIS TOOLBOX example
- Connect & collaborate**  

MATCHMAKING

### Main public and private budget sources

Filter: Continent: Europe

Budget Source	Count	Percentage
Only public budget sources	9	11.76%
Only private budget source	10	14.79%
Public and private budget sources	59	73.53%

### Main hurdles and barriers in preparation phase

Filter: Continent: Europe

Hurdle/Barrier	Count	Percentage
Technological readiness/technological performance	35	64.8%
Regulatory provisions	25	46.3%
Permitting and authorization procedures	37	68.52%
Political backing and buy-in	17	31.48%
Funding	41	75.93%
Experienced staff	12	22.22%
Local public acceptance	23	42.59%
Project's business case	28	51.85%
Stakeholder cooperation	18	33.33%
Risk sharing mechanisms between project partners	15	27.78%
Project governance model	7	12.96%
Other	2	3.7%

## Why update your profile?



Stay **visible** to stakeholders



Showcase **project progress**



Remain part of the Hydrogen Valley **network**

**Click here if you want to join the H2V Platform**

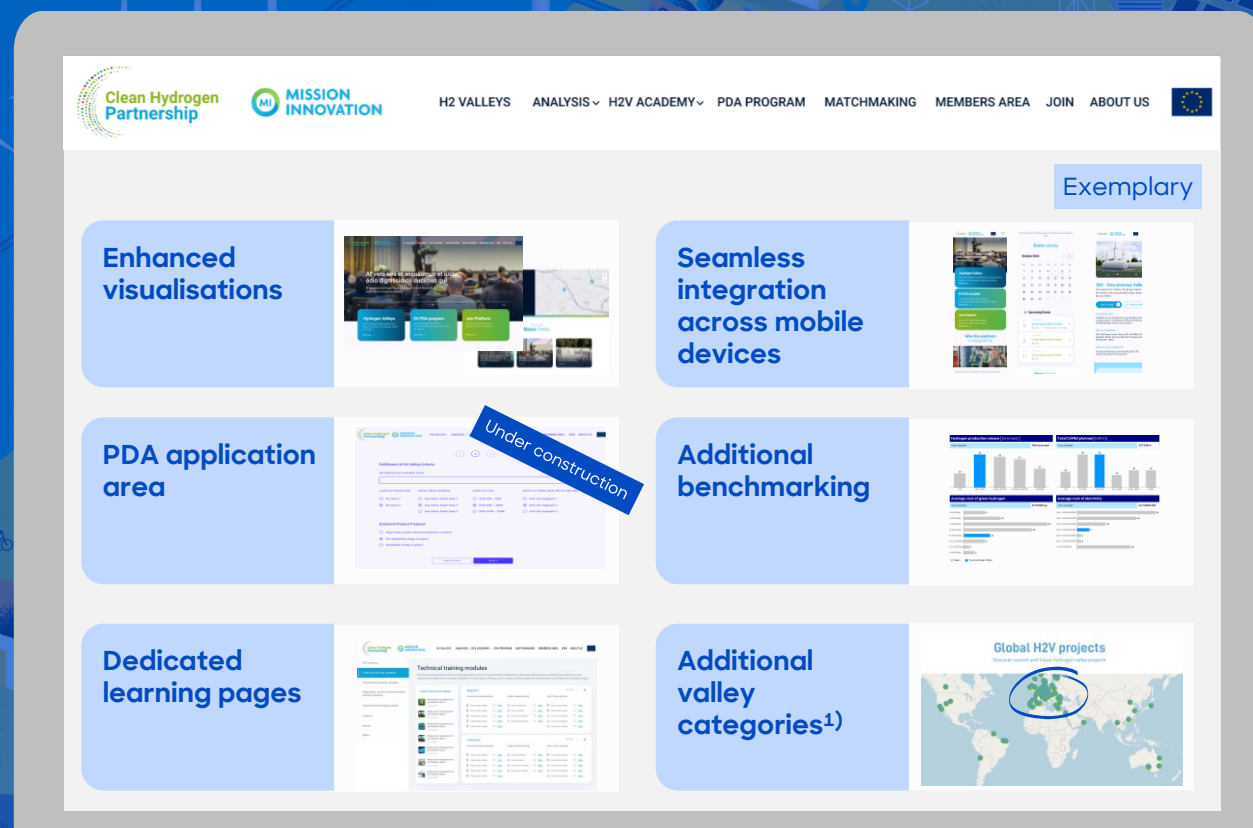
[membersarea.h2v.eu](https://membersarea.h2v.eu)





# Within the H2V Facility, the H2V Platform will be enhanced with new technical and content features to address the evolving needs of Hydrogen Valleys

## Outlook on new H2V Platform features



[h2v.eu](https://h2v.eu)

1) Current focus lies on European valleys, additional global valleys to be incorporated at a later stage



# Apply for the first call of Project Development Assistance to unlock support on your way to FID

Outlook: First call for applications for PDA support

## Details for the first PDA call

### What is offered?

Up to **15 PDA light/plus**  
(final allocation between light and plus will be decided based on incoming applications)



### Who can apply?

**Hydrogen projects in EU/Horizon Europe**  
countries meeting the **valley criteria**



### How to apply?

Complete application on **dedicated application platform** as part of the **H2V Platform**



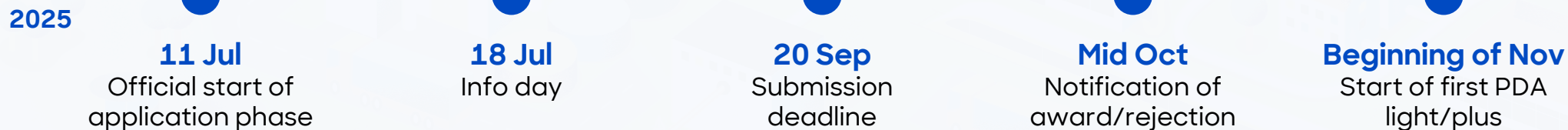
### What are the award criteria?

#### 4 award criteria

- Commercial maturity
- Technical maturity
- Valley governance & operational maturity
- Contribution to RePowerEU/Clean Ind. Deal plan & rationale for PDA

## Timeline application / award process

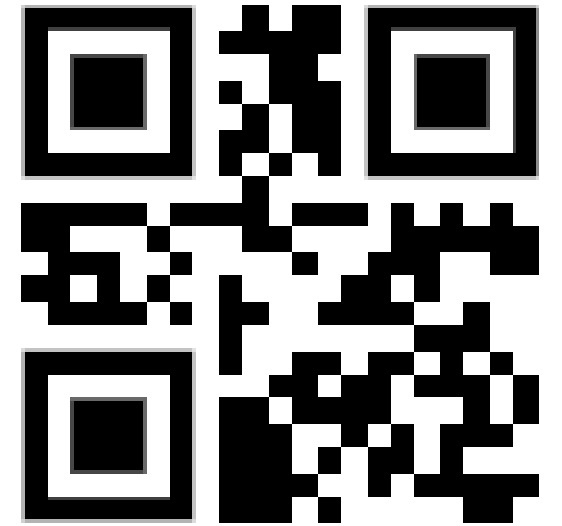
*Timeline is indicative / preliminary, pending final confirmation*



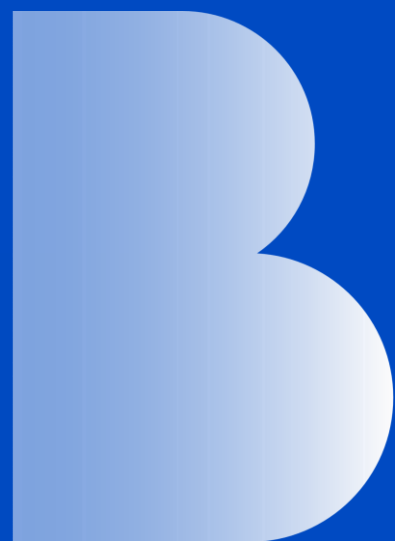


Thank you for your attention!

Happy to take  
**your questions**  
on the H2V Facility



[h2v.eu](https://h2v.eu)



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