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Industry Vision for Biogases Tripartite Agreements

This paper, jointly prepared by the European Biogas Association (EBA) and the Support Group of the Biomethane Industrial Partnership (BIP) presents a strategic vision for biogases. As a contribution to the Tripartite Agreements framework, it seeks to facilitate stakeholder dialogue and guide future developments in the sector. We stand ready to discuss the paper further with the European Commission and other stakeholders to support collaborative progress.

The biogas industry in Europe has shown remarkable expansion in recent years, registering a consistent annual growth rate of approximately 20%. As of 2023, biogases supply **19 billion cubic meters (bcm) of renewable gas** to the European market, accounting for around 6% of the EU's natural gas consumption. This upward trend is backed by increasing private sector engagement, with projected investments totalling €17 billion in the EU-27 biomethane segment by 2030. These investments are expected to generate an additional 4 bcm of biomethane production capacity annually by the end of the decade.
Beyond renewable energy production, the sector contributes added value through its co-products: **digestate,** a nutrient-rich organic fertiliser that enhances soil fertility, and **biogenic carbon**, which can be harnessed for industrial uses or for carbon capture and storage to deliver permanent carbon removals. The REPowerEU Plan recognised the contribution of biomethane in particular during the energy crises, as a scalable own source of renewable gas, and set a biomethane target of 35 bcm by 2030.

Against the current backdrop of heightened geopolitical instability — including Russia's war against Ukraine — and intensifying global competition, the EU faces mounting pressure to enhance competitiveness, resilience, resource efficiency and energy security. In alignment with the Competitiveness Compass, the Clean Industrial Deal and the EU Climate Law, biogases and their by-products have emerged as **crucial components in the EU's transition towards its 2030, 2040 climate and energy objectives, and ultimately, climate neutrality by 2050**. Furthermore, initiatives like the Vision for Agriculture and Food and the REPowerEU Roadmap and its related required National Diversification Plans, underscore the role of biogases in helping the agricultural and energy sectors **reduce external dependencies.**

The **Biomethane Industrial Partnership (BIP),** launched as part of the REPower EU Plan and financially supported by the industry, represented a successful cooperation between the industry, the European Commission and Member States. It achieved significant progress during this period, assisting Member States in their development of national strategies on biomethane production, promoting cooperation on biomethane with neighbouring countries, including Ukraine, and publishing many valuable insights.

However, the efforts so far have not resulted in the needed acceleration of the sector. Low political recognition, fragmented policy frameworks and unresolved barriers continue to hinder the sector's ability to scale at the pace required. The European Commission is exploring the opportunities and potential in the establishment of **Biogases Tripartite Agreements** to provide a coordinated, consultative and collaborative approach to sector development.

According to the industry, such Biogases Tripartite Agreements **can only work well if they are clearly linked to its sustainable potential in terms of biogases production** – 101 bcm of biomethane by 2040. Achieving this target could deliver significant socio-economic and climate benefits, including 480 Mt of CO_2 emissions savings[1]. In turn, this would strengthen and build the resilience of regional economies, create local green jobs, retain economic investment within Europe and reduce dependence on foreign energy, fertilisers, and biogenic carbon. Ultimately, it would enhance Europe's long-term security and competitiveness.

The **European Biogas Association (EBA) representing the biogases sector, including the Industry Support Group of the Biomethane Industrial Partnership (BIP)**, welcomes the set-up of Biogases Tripartite Agreements and has the following suggestions to be incorporated in their set-up:

1. **Core objectives and governance**
2. **Intervention Areas**
3. **Progress monitoring**

1. Core objectives and governance

The Biogases Tripartite Agreements should be established as a structured and collaborative framework, uniting **key stakeholders across the biogases value chain** to collectively pursue the potential and opportunities as shared objectives. As an essential initial step, the objectives must be explicitly articulated within a **Strategy or Charter**, which will constitute the foundational framework, commitment and overarching vision guiding the implementation of the Tripartite Agreements. Without such clarity and direction, the achievement of substantive and coordinated progress will be significantly hindered.

The composition of the Biogases Tripartite Agreements will vary according to the specific objectives and scope, and may include one or more of the following stakeholders:

- **Member States**, potentially organised in coalitions reflecting common challenges and priorities
- The **European Commission**
- The **biogases industry**, represented at national and European level

[1] European Biogas Association. (May 2025). *EBA Roadmap towards 2040: Biogases as substantial source of circular and affordable energy for Europe.*

- **Additional relevant stakeholders**, including end-users, traders, infrastructure operators, agricultural organisations, civil society, and others.

The role of the European Commission is **critical**, particularly on overarching issues such as establishing a well-functioning internal market for biomethane and unlocking its full EU-wide potential. We urge the Commission to assume a **leadership role** in managing the Tripartite Agreements. This includes actively steering discussions and taking the lead in shaping the regulatory, financial and technical environments. The Commission's engagement is essential to **ensure coordinated and binding national efforts, the removal of barriers and the stimulation of investment thereby providing long-term stability for both producers, distributors and end-users**. We count on DG ENER to foster open dialogue with other Directorate-Generals (AGRI, ENV, GROW, etc.), with Member States, industry and other stakeholders, and to guarantee a level playing field for the biogases sector — laying the groundwork for future frameworks that support its long-term development and ability to deliver beyond energy.

EU Biogases Strategy/Charter	**Tripartite Dialogues**	**Tripartite Agreements**

Common strategic objectives and directions for action	*Collaborative space to support the delivery of the Strategy*	*Roadmaps Commitment to actions*
European Commission Member States Industry	Several Dialogues working on different "Intervention Areas". In each Dialogue, several stakeholders depending on relevance: • European Commission and/or Member States • Biogases industry, at national or EU level • Additional relevant stakeholders	Signed commitments by stakeholders that developed the Agreement including the European Commission OR Member States

2. Intervention Areas

The **final Tripartite Agreements** emerge from the **Tripartite Dialogue**, established in response to identified needs at either the Member State and/or European level. The primary objective is to conclude a tripartite agreement addressing a specific national issue and/or a broader European priority. Furthermore, these agreements may be structured around a range of **Intervention Areas** relevant for Member States, end-users, producers or the broader agricultural sector.

Depending on the context setting, the following **Intervention Areas**, individually or in combination, at Member State and/or European level, may be incorporated into the final agreements:

1. End-Uses and Market Uptake

2. Internal Biomethane Market
3. Permitting and Production
4. Co-products Valorisation
5. Governance and Monitoring
6. Waste management
7. Sustainability
8. Grid Infrastructure and Energy Storage
9. Defossilisation of hard-to-decarbonise transport
10. Investment and Funding
11. Agroecological, regenerative and organic farming
12. Research and innovation
13. Revitalisation and potential clustering of existing biogas plants
14. Planning of new capacities
15. Development of degraded- / abandoned- / contaminated land.

Further details on specific proposals pertaining to each Intervention Area are provided in the **Annex**.

3. Progress monitoring

Following the establishment of the overarching **Strategy or Charter**, potentially under the patronage of the Member State holding the EU Council Presidency, regular progress monitoring should be conducted. This should be guided by clear KPIs and benchmarks, with annual results published in an official public report. This monitoring process is intended to facilitate the exchange of best practices/ technologies, assess developments, and identify necessary actions. It is recommended that such monitoring take place annually through a high-level political and industrial forum, convening ministers and chief executives for a one-day event in Brussels, to be facilitated by the European Commission., at Commissioner/Cabinet level.

ANNEX: Intervention Areas

1. **End-Uses and Market Uptake** (EU + MS level)
- Develop incentives for the use of biogas, biomethane and biohydrogen in **transport, industry, heating and power**.
- **Foster a long-term technology neutral approach towards the defossilisation of end use sectors**, giving regulatory certainty on the use of biogases and biomethane as a renewable energy source.
- Clarify existing regulatory uncertainties on the **treatment of new feedstocks** for various end-uses.
- Develop **sector-specific roadmaps** and incentives for end-users.
- Raise **awareness** of the environmental and economic benefits of biogases among consumers, businesses and public institutions.

2. **Internal Biomethane Market** (EU level)
- Harmonise the **sustainability certification process** for biogas and biomethane, ensuring consistency across different voluntary schemes and certification bodies.

- Implement the mass balancing tracking system in **national energy and GHG emissions inventories**.
- Harmonise the **recognition of the mass-balance tracking system** across national compliance schemes.
- Enforce the recognition of the **zero-emission factor** under the EU Emissions Trading Scheme with harmonised administration process for documentation requirements in all Member States.
- Enforce **harmonisation of Proofs of sustainability** and classification of feedstock categories.
- Deploy swiftly the **Union Database for Biofuels** (UDB) along with a wide information campaign to the obligated companies.
- Harmonise the use of **Guarantees of Origin** in the market.

3. Permitting and Production (EU + MS level)

- Streamline **permitting procedures** for biogases projects by implementing digitalisation, one-stop-shops, and coordinated administrative processes within Member States to reduce costs, delays and uncertainty.
- Ensure the availability of **sustainable feedstocks**.
- Address **skills shortages** by promoting vocational training and workforce reskilling and upskilling in the biogas value chain.

4. Co-products Valorisation (EU +MS level)

- Promote the sustainable use of **digestate** as an organic fertiliser able to displace synthetic fertilisers, prioritising efforts to reduce dependency on Russian fertilisers.
- Integrate digestate into EU strategies, including targets, on **circular economy, soil health and regenerative agriculture**.
- Set an **EU-wide target** for biogenic carbon capture/removal.
- Support deployment of **carbon capture, utilisation and storage (CCUS)** from biogenic sources, for example in relation to the development of e-methane, other e-fuels, methanol or other components.

5. Governance and Monitoring (EU + MS level)

- Explore the set-up of **an EU biomethane consumption target**: target in the Renewable Energy Directive and/or blending mandate at national level (for example on GHG emission reduction targets).
- Better integrate biogases into **National Energy and Climate Plans (NECPs)**.
- Explore the appointment of a national **Biogases Coordinator** to supervise the achievement of the Charter's goals.

6. Waste management (MS level)

- Enforce separate collection of bio-waste and ensure **the development of corresponding treatment capacity through planned or existing biogas plants**.
- Establish an agreement to **convert wastewaters treatment plants (WWTPs) into facilities incorporating biogas production**, in line with new EU energy neutrality obligation.

- Develop and enforce quality standards to ensure **that sewage sludge-derived digestate is suitable for land application**.
- Formulate strategic recommendations to promote the **redirection of industrial wastewater and solid waste streams towards biogas production**.

7. **Sustainability** (EU + MS level)

- Develop and promote leak **detection and repair (LDRAR) guidelines** to mitigate methane emissions.
- Support **complementary agroecological and regenerative practices** in conjunction with existing on-farm biogas systems or the application of digestate.
- Promote the use of **best available techniques for increased digestate stability and closed digestate storage**.
- Facilitate access to funding for **agricultural machinery that reduces nutrient pollution and emissions**.
- Develop a **dedicated programme to reduce on-farm pesticide use** by leveraging the soil health benefits of organic soil improvers, including digestate (and biostimulants derived from digestate).

8. **Grid Infrastructure and Energy Storage** (EU level)

- Introduce harmonised rules facilitating the injection of biomethane into existing gas networks based on the "**right to inject**" mandated by the Gas Directive.
- Set-up regulatory frameworks for **cost-effective gas grid reinforcements** unlocking further the biomethane potential.
- Ensure **standardisation** to support grid compatibility and economies of scale in equipment manufacturing and installation.
- Promote biomethane inclusion in **long-term grid planning** for both TSO and DSO perspectives.

9. **Defossilisation of hard-to-decarbonise transport** (EU + MS level)

- Include a **technology neutral approach** towards renewable and sustainable technologies that aim to decarbonise the fleet, including biomethane and bio-LNG.
- Fully **scale up LNG and CNG infrastructure** along with fuelling stations to provide measures to transport, store and bunker bio-LNG used for transportation modes.
- Foster collaboration at local and rural levels to provide **sustainable urban transport modes** for citizens by providing clean vehicle fleets.
- Explore the set-up of **tax exemptions and fiscal measures**, based on good examples in several Member States, to incentive the full uptake of renewable fuels.
- Account for the **full lifecycle of emissions of biofuels**, taking into considering a Well to Wheel or Well to Wake approach.

10. **Investment and Funding** (EU + MS level)

- Identify and set up **public and private financing mechanisms** to scale up biomethane production.
- Improve access to **existing EU funds** (e.g. Innovation Fund, CEF, CAP, cohesion funds).

- Explore smart (National) **support mixes** providing long-term investment visibility and making a way for demand-driven growth.
- Promote mechanisms that de-risk investments such as **Biomethane Purchase Agreements (BPAs)**.
- Support the long-term **competitiveness of the bioeconomy**, route to market and market uptake of bio-based products, for example by consumption targets.

11. Agroecological, regenerative and organic farming (EU + MS level)

- Support the **reduction of synthetic fertilisers and pesticides** through integrated agroecological farming practices combined with biogas systems.
- Encourage the **deployment of sustainable biomass sources** (such as sequential and intercropping systems) beyond food and feed crops to **support soil regeneration, carbon farming** and the production of sustainable biogas.
- Engage with relevant associations to establish **shared objectives for expanding on-farm biogas production and promoting the use of digestate** in agroecological, regenerative and organic farms.
- Explore policy, technical and financial strategies to promote deployment of biogas plants targeting **agricultural waste as feedstocks** (co-digestion, decentralised innovative methodologies, cooperation) and linking added value biorefining.

12. Research and innovation

- Explore targeted support for **emerging technologies**, such as pyrolysis, GHG emissions capture and e-methane production.
- Valorise **digestate use in other industries**, e.g. fermentation inoculants, lignin and derivatives platform.
- Integrate biomethane and biohydrogen with other fuels targeting **sustainable aviation fuels.**

13. Revitalisation and potential clustering of existing biogas plants (MS level)

- Explore and develop **new innovative, smart financing models** to attract a diverse range of funding sources to support biogas plant upgrades and strengthen their long-term (financial) sustainability.
- Establish **joint agreements between funding entities and beneficiaries** — including within the framework of existing financial schemes — to encourage reinvestment.
- Support the development of **cooperative partnerships frameworks** (involving plant owners, investors, local communities and/or end-users).

14. Planning of new capacities (EU + MS level)

- Implement a **zoning approach**, mapping long-term production potential at local level and matching it with infrastructure availability.
- Set up a **Guidance for the implementation of RES Acceleration Areas** for biogases.
- Designate zones where new production projects are classified as **serving the overriding public interest**.
- Leverage the **TEN-E Regulation** (and its revision) to support combined production and offtake projects with cross-border impact or significant contribution towards the 35 bcm objective.

15. Development of degraded- / abandoned- / contaminated land (EU + MS level)

- Develop a **comprehensive mapping** of degraded, abandoned, and contaminated land at national, regional, and local levels.
- Create **concrete action plans to restore and repurpose these lands** by promoting the cultivation of crops suitable for sustainable biogas production.
- Launch awareness and **promotional campaigns** to inform local farmers and landowners **about available funding and incentive** opportunities.
- Establish **monitoring frameworks to assess soil quality** and track improvements over time.
- Support the **identification of the most suitable crop** types for each land category**, in line with legal requirements** for sustainable cropping systems.

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About the European Biogas Association (EBA)

EBA fully believes in the future potential of renewable gas in Europe. Founded in 2009, the association is committed to the deployment of sustainable biogas and biomethane production and use throughout the continent. EBA counts today on a well-established network of over 350 national associations and other organisations covering the whole biogas and biomethane value chain across Europe and beyond.

www.europeanbiogas.eu

About the BIP Support Group

The Support Group is a vital component of the Biomethane Industrial Partnership (BIP) representing the biomethane value chain. Comprising up to twenty individual companies that financially enabled the BIP's operations, the Support Group ensures the interests of the biomethane value chain are adequately represented in the BIP decision-making process.

https://bip-europe.eu/support-group/