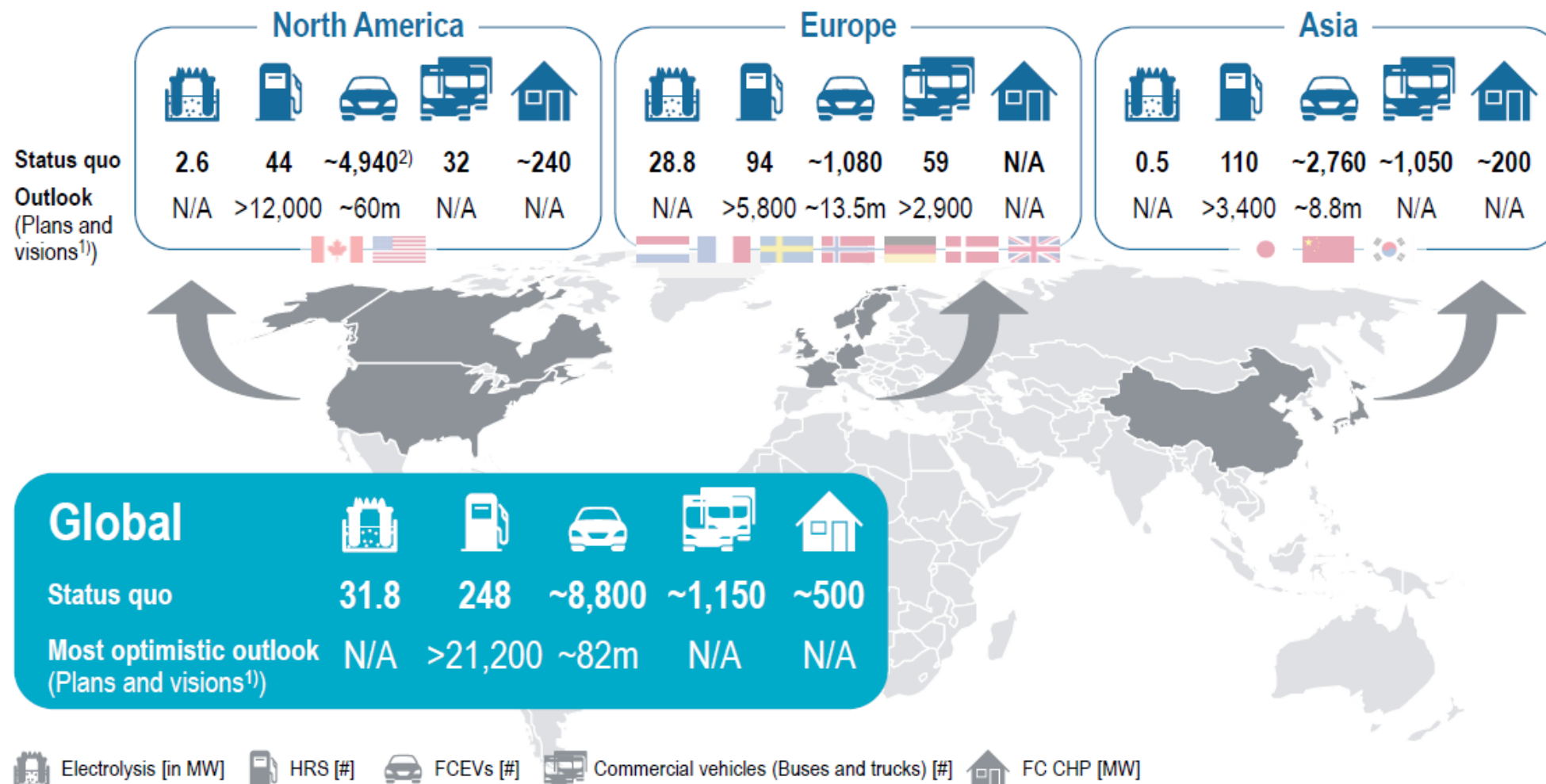


# **Fostering Deployments – Next steps**

11 February 2019

# STATUS OF HYDROGEN DEPLOYMENTS

Status and publically stated plans of deployment of FCH technology by continent



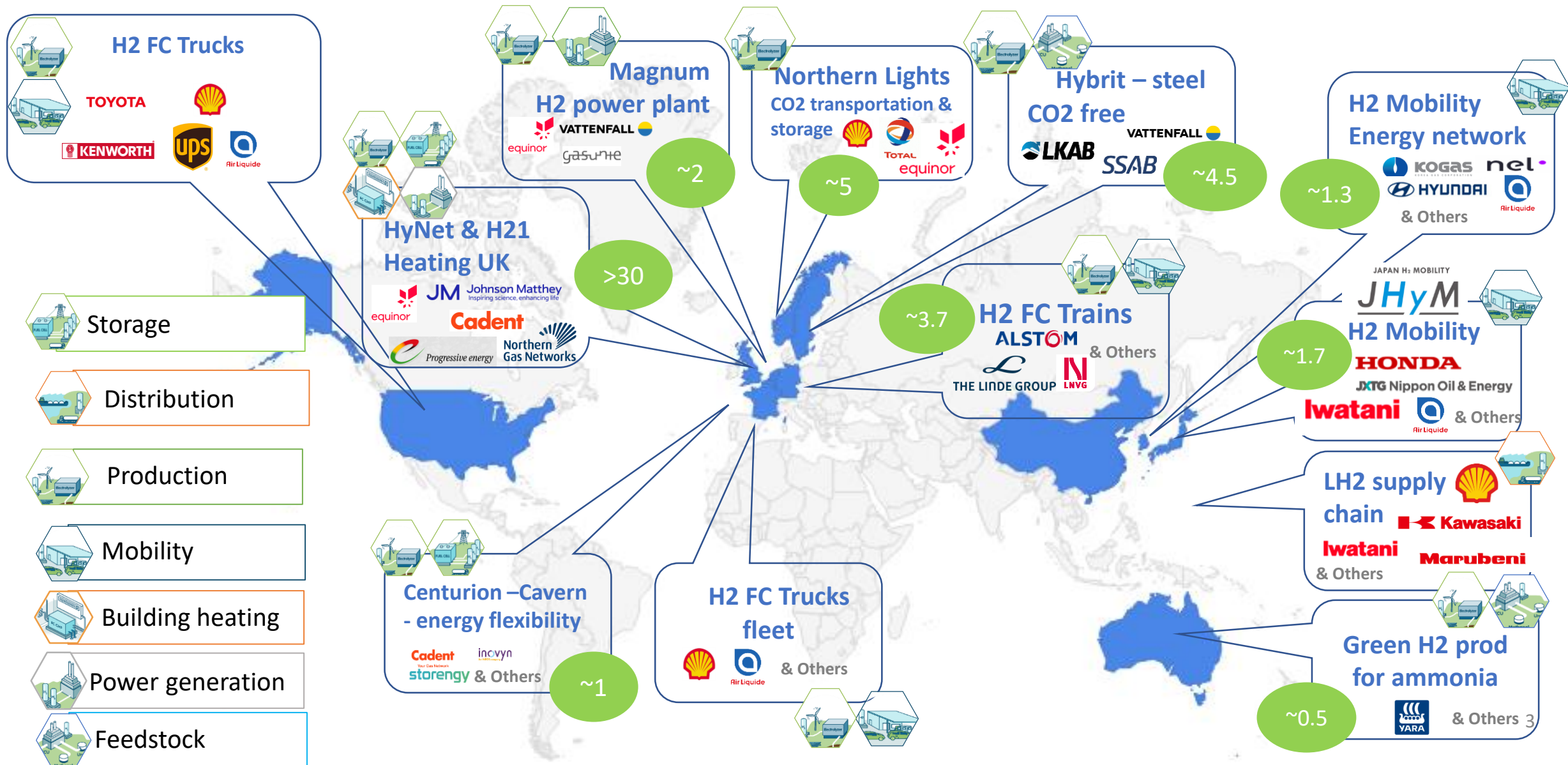
1) Sum of government's publically stated ambition worldwide (Long-term 2030+) 2) 4,926 FCEVs in California  
Source: Public reports and databases; Desk Research; Roland Berger



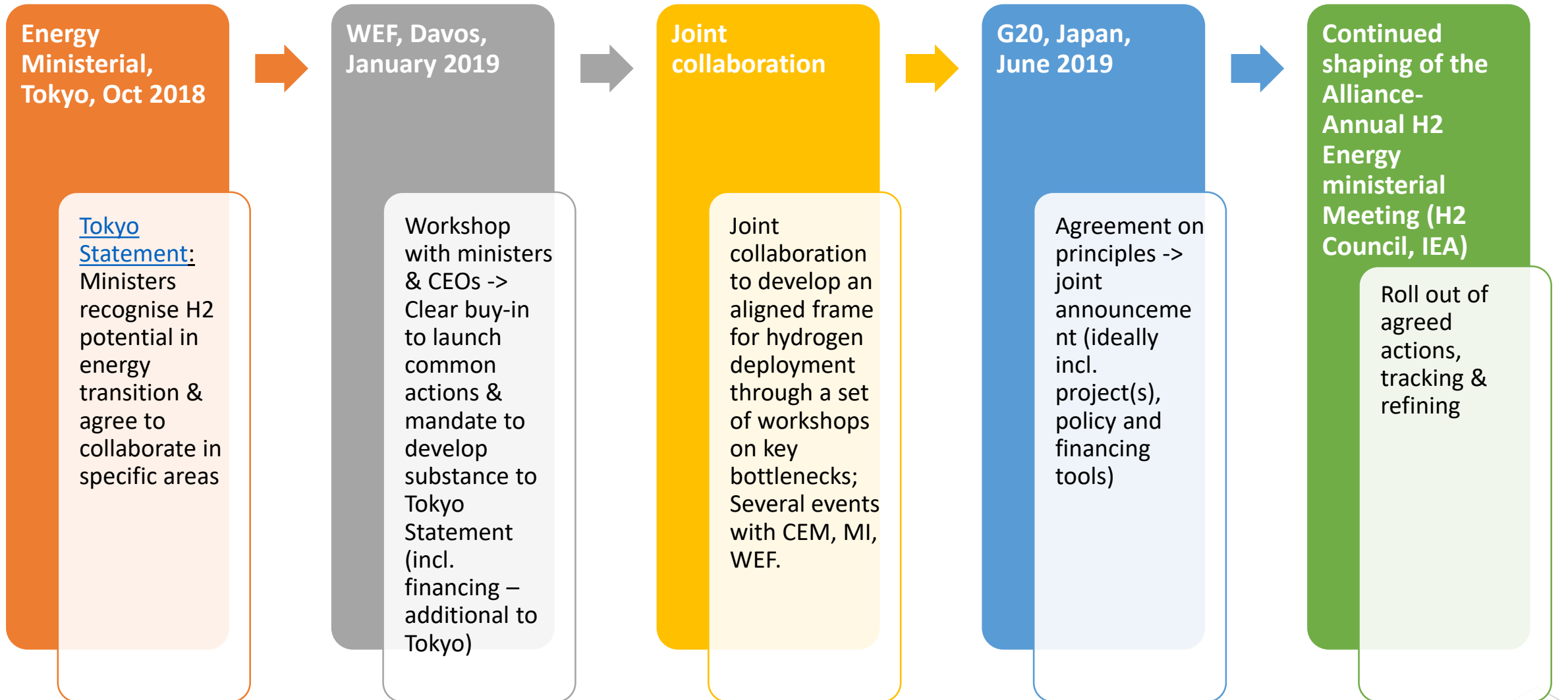
# ON GOING LARGE « FLAGSHIP » PROJECTS

X

Foreseen CO<sub>2</sub> abatement of project at scale (Mt)



# HOW TO GET FROM IDEA TO REALITY



# HYDROGEN DEPLOYMENT FRAMEWORK MATRIX

THEMES	CLEAN HYDROGEN	UPSTREAM SUPPLY CHAIN	TRANSPORT	TOPIC DEVELOPMENT APPROACH
<b>RULES / REGULATIONS</b>	Pathways / Rules <i>(Europe lead - Certifhy)</i>	Maritime rules <i>(Japan/Australia lead)</i>	Infrastructure & supply chain regulations <i>(Lead ?)</i>	Public / private workshops <i>(IPHE support)</i>
<b>R&amp;D</b>	Private sector driven	Public / Private	Private sector driven	Public / Private effort <i>(MI support)</i>
<b>MARKETS</b>	All	Energy	Heavy duty, public transport & intensive usage	n/a
<b>EDUCATION</b>	Communication channels & events <i>(public-private driven – CEM?)</i>			n/a
<b>SAFETY</b>	Public / Private			n/a
<b>FINANCING</b>	Policies / Contract For Difference / CO2 Price	Large demonstration schemes	Policies & guarantee mechanisms	Public / private workshops - <i>Hydrogen Council lead</i>

# STAKEHOLDER ROLES ?

## **METI / Governments**

- Gathers interested governments to share views on the developed topics with an aim to develop common standards and regulations on those which have been identified and discussed – Support from IPHE organisation

## **IEA**

- Build scenarios and roadmaps on technologies and markets deployment, analytical & economical support

## **Hydrogen Council**

- Brings best practices from operational experience
- Provides data to substantiate the competitiveness analysis and decarbonisation pathways roadmap
- Gathers financial players to develop right policy / financial tools

## **WEF**

- Helps bring together public and private stakeholders and contributes to the shaping of the long term multilateral public-private cooperation on hydrogen

**Thank you for your time!**

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