

Hydrogen deployment and utility integration: UK growth prospects

May 2022

Members



ARUP		Baker McKenzie.	BAXI	BNP PARIBAS	A Member of The Linde Group	BOSCH
	Cadent Your Gas Network	centrica	DNV	SedF	equinor	NATIONAL NUCLEAR
• ITM POWER	JM	Northern Gas Networks	Orsted	SGN		RWE
Sizewellc Doing the power of good for Britsm	Sse Thermal	uni per	VIESMANN	national grid	PHILLIPS 66	LEVIDIAN
kiwa	G Green Hydrogen Solutions™	<i>Progressive energy</i>	GHD	Net Zero Technology Centre		BayoTech





520 projects gaining momentum around the world



43

Giga-scale production

Renewable H₂ projects >1 GW, lowcarbon H₂ projects >200 ktpa

• 221

Large-scale industrial usage Refinery, ammonia, methanol, steel, a industry feedstock

• 133

Transport Trains, ships, trucks, cars and other hydrogen mobility applications

• 74

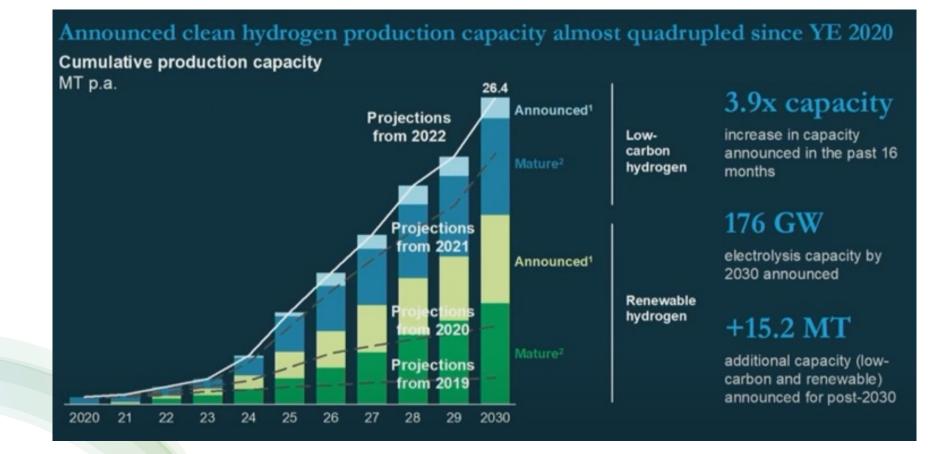
Integrated H₂ economy cross-industry, and projects with different types of end-uses

• 51

Infrastructure projects² H₂ distribution, transportation, conversion, and storage

> Hydrogen Council

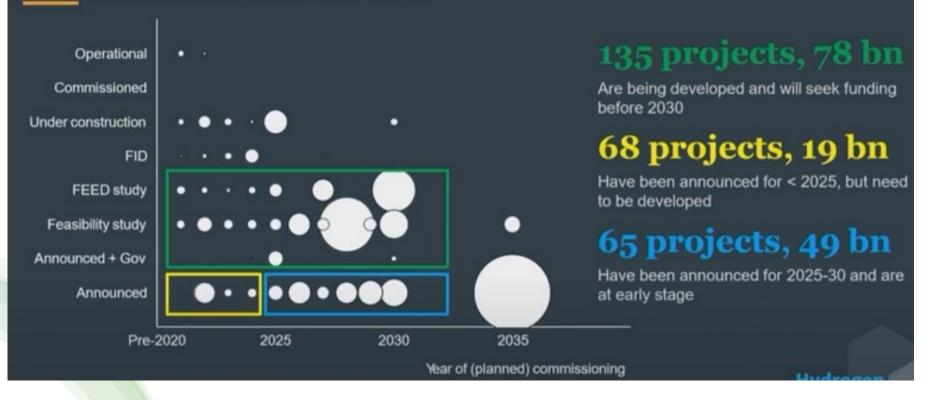






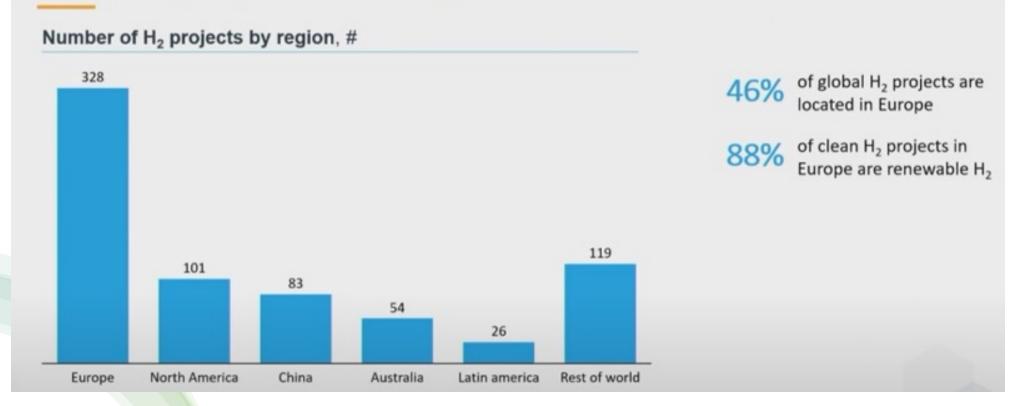
Project sizes are increasing ~78 bn of projects currently under development

Average estimated investment of announced projects¹



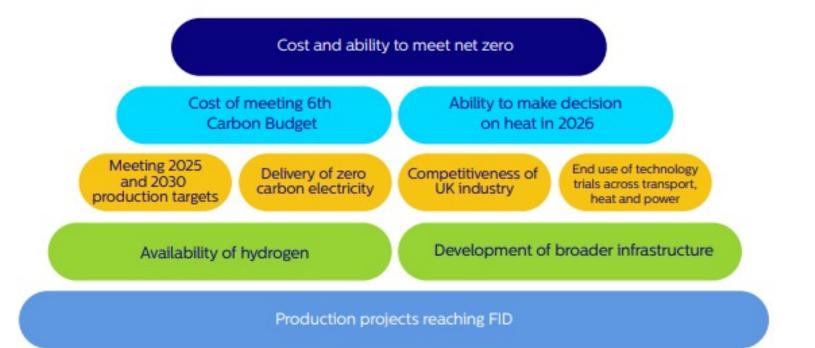


Europe in focus: 328 H₂ mature projects to date 94,6% of projects awaiting FID





The foundation...





Hydrogen UK – Next Steps



Scale production rapidly by making Hydrogen Business Models available to producers by mid-2022.



Stimulate demand for hydrogen by developing detailed and distinct policy and regulatory frameworks to create markets in end use sectors.



Provide links between supply and demand by establishing mechanisms to unlock capital investment in distribution and storage infrastructure.



Develop the necessary training and support to ensure the UK has the skilled workforce to deliver on its hydrogen ambitions.



Ensure that no one is left behind by working with a wide range of stakeholders to build a hydrogen society.



Thank you!



