Welcome to the WIC meeting!





Welcome to our digital WIC meeting! A few game rules:

 \checkmark Ask your questions in the chat (=)

✓ You can use mic/cam in the question round ?

AGENDA



New members

10.00 – 10.40 AM : Presentation new members: Bureau Veritas, Ziero, Inovyn, SEA Tank Terminal, John Cockerill, Air Products

Hydrogen in logistic & transport applications

10.40 – 11.00 AM : Powering the future @ Plug Power (Devon Hyver)

Guest speaker

11.00 – 11.20 AM : Hydrogen developments in the Netherlands (Jörg Gigler)

General info

11.20 – 11.40 AM : News from the cluster 11.40 – 11.50 AM : News from cluster members 11.50 – 12.00 AM : O&A

PRESENTATION NEW CLUSTER MEMBERS







AIR AIR PRODUCTS 2







Presentations



2021 | INTRODUCTION WATERSTOF INDUSTRI CLUSTER MEETING

A GLOBAL LEADER IN TESTING, INSPECTION & CERTIFICATION SERVICES



01

BV AT A GLANCE

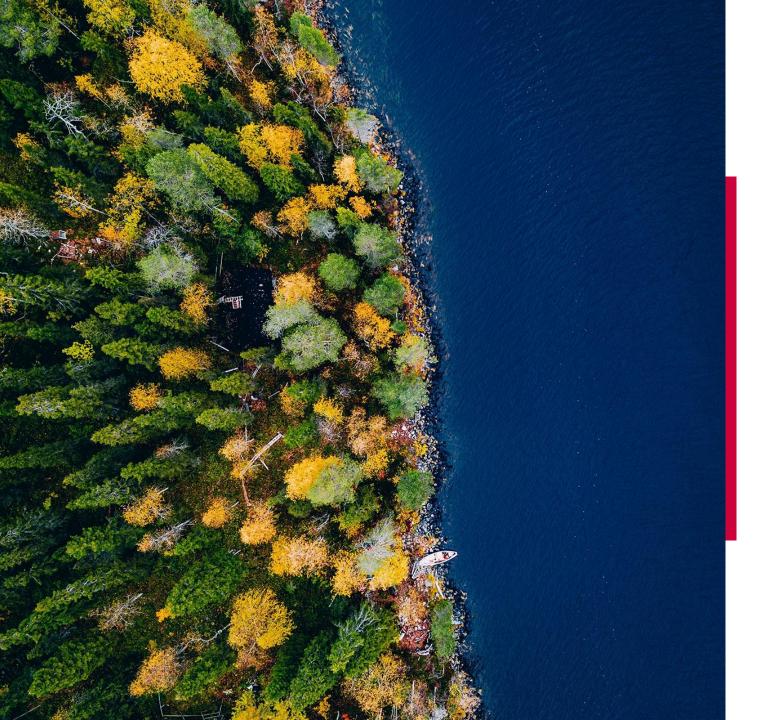
02 SUSTAINABILITY AS A SERVICE

& CSR AS A COMMITMENT

03 ACTIVITIES & ORGANIZATION







BV AT A GLANCE













SOME REFERENCES



BUREAU VERITAS: BENELUX ORGANIZATION

MANAGEMENT & TEAMS



Richard ZAPPEIJ

Regional Chief Executive Belgium and the Netherlands

- 13 locations 6 in Belgium
- >1,100 full time staff 350 in Belgium
- Active in Certification, Industrial Inspection, Risk Consultancy, Health & Safety, PED

KEY CUSTOMERS



OUR FOOTPRINT





SUSTAINABILITY AS A SERVICE & CSR AS A COMMITMENT

Bureau Veritas

WELL POSITIONED TO BENEFIT

from accelerating sustainability challenges



Reinforced stakeholders' expectations

Increasing regulations

Need for improving risk management

Optimizing business performance

Increased support from "Green" stimulus plans ← ↓ EXTERNAL POSITIONING

Successful launch and strong traction from the BV Green Line of Services & Solutions supported by strong macro drivers



Ambition to become an **industry leader**, supported by our **"Shaping a Better World"** CSR plan through 2025

AT BV, WE SUPPORT OUR CLIENTS IN COMPLYING WITH REGULATIONS, MANAGING RISKS AND IMPROVING PERFORMANCE...

RESOURCES & **PRODUCTION**

RENEWABLES & ALTERNATIVE ENERGIES

ENERGY TRANSITION

Onshore and offshore Wind Farms, Solar Power Plants from Project to Asset Management, Biofuel and Hydrogen certifications

SUSTAINABLE USE OF NATURAL RESOURCES

Agribusiness harvest monitoring and Precision Farming, Responsible Fishing, Forest Certification and Maritime Pollution Prevention

INDUSTRY CARBON FOOTPRINT

Carbon footprint monitoring, energy saving verification, industrial environmental control and testing and emissions control

CONSUMPTION & TRACEABILITY

SUSTAINABLE SUPPLY CHAINS, FOOD CERTIFICATION

Product component testing, organic certification, supply chain resilience audit, circular economy verifications and ESG supply chain audits

BUILDINGS & INFRASTRUCTURE

CONSTRUCTION & REFURBISHMENT

Green building certification, project management for infrastructure improvement in developing countries and infrastructure life-cycle asset management in mature countries

NEW MOBILITY

E-MOBILITY, ALTERNATIVE PROPULSION

Batteries, charging station, connectivity testing, LNG ship inspection (new build, conversion)

SOCIAL, ETHICS & GOVERNANCE

SOCIAL PRACTICES

Social audits, health, safety, hygiene and inclusion protocols

CSR STRATEGY

Policy monitoring, Management systems improvement, Reporting verification

ETHICS & BUSINESS PRACTICES

Human rights assessment, supplier assessment, anti-bribery certification, Data Privacy and Cybersecurity certifications

... ALL ALONG A GREEN LINE OF SERVICES & SOLUTIONS



OUR CSR RATINGS

Dow Jones Sustainability Indexes Rated 84/100 Listed in Europe and World indexes Gold medal in the sustainability yearbook V.E

Rated "Robust" Ranked #9/102 of its market sector



Rated AA



Rated Low risk Ranked #2 in Research and Consulting category



Gold CSR rating for France

EthiFinance

Rated 83/100, above sector (51)

CDP

Rated B, above sector average (B-)



Rated Prime





HYDROGEN BV SOLUTIONS



H2 ECOSYSTEM BV PARTICIPATION H2 PLATFORMS



BUREAU VERITAS IN H2 OFFSHORE

https://north-sea-energy.eu/en/2021/04/22/bureau-veritas-new-partner-in-north-sea-energy-program/

15





Hydrogen Council

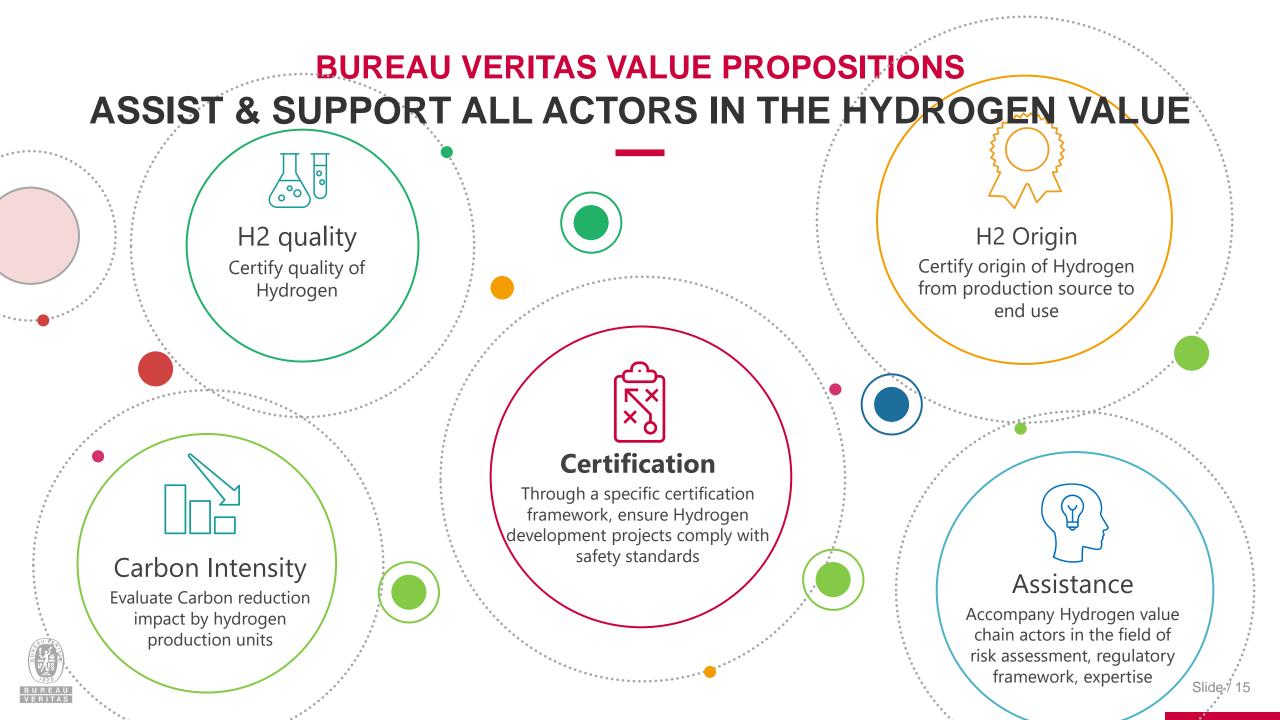




European Clean Hydrogen Alliance





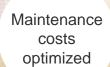


DELIVERING INNOVATION H2 VALUE CHAIN

Availability

ensured

Dedicated sustainable energy services & solutions All along the value chain from production until end-use





CERTIFICATION

Conformity

verified

Demonstrate compliance & secure viability

- Approvals in Principle
- Prototype certification
- Component certification
- Type certification
- Project certification •



⊠= ⊠=

Delivered on time and

on budget

Reduce development risk

Wind measurement & site assessment

Hydrogen H2

zero emissio

- Marine Warranty Services
- Grid connection assessment
- Design review
- Environmental impact assessment
- Permitting support
- Risk assessment
- Due diligence
- Investor / lender services



HSSE

prioritized

PROCUREMENT

Access a global, reliable supply chain

- Supply chain technical . assessment
- Technical procurement support
 - Shop inspections (QA/QC)
- Expediting
- Factory acceptance tests
 - Transport, loading & unloading supervision



Star And

CONSTRUCTION

Run projects safely & to schedule

- Project & construction management support
- On site HSE
- Turbine foundation supervision
- Commissioning and test run supervision
- Take over and end-ofwarranty inspections



Risks

assessed and

mitigated

ASSET OPERATION

Ensure availability & shorten outage time

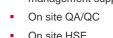
- Periodic inspections of blades & main components
- Non-destructive testing
- Load measurements
- Vibration monitoring
- Thermographic inspections
- Oil analysis
- Endoscopic inspections
- Rotor balance inspections
- Earth termination measurements
- Training
- Failure & damage analysis



ASSET MANAGEMENT

Extend operating life & increase performance

- O&M management .
- Maintenance strategies
- Condition monitoring & assessment
- Asset integrity management
- Reliability engineering
- Performance optimization
- Turbine digital twin
- Remaining life assessment & lifetime extension



SOME REFERENCES







Shaping a World of Trust

WWW.BUREAUVERITAS.COM

in 🏏 🞯 F

IN EQS

A leading company in clean hydrogen development

Meeting with Waterstofnet 02 June 2021



INEOS

The world's 3rd largest chemical company



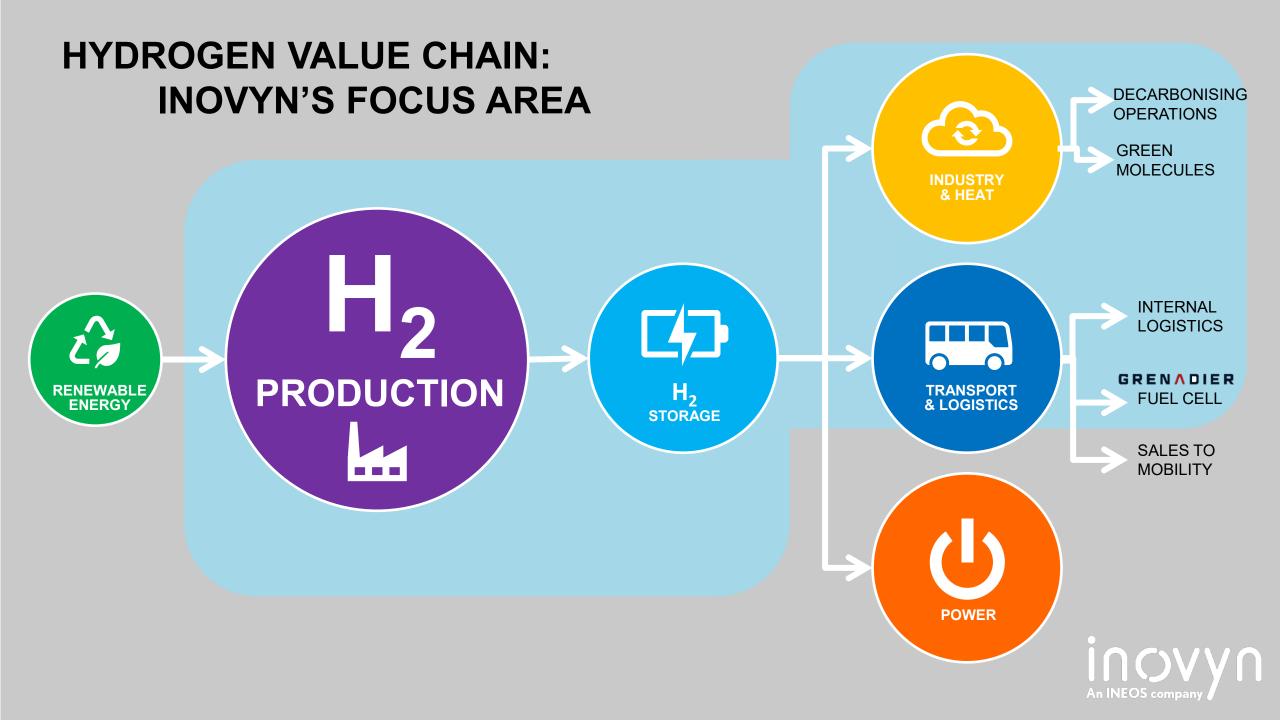
A subsidiary of INEOS and leader in chlorvinyls





- INEOS launched a new clean hydrogen business in November 2020
 - INEOS currently produce ~400,000t H₂ p/a as a co-product (of which ~60,000t H₂ p/a in INOVYN)
- INOVYN is Europe's largest operator of electrolysis technology with the production of chlorine
 - INOVYN develops and licenses electrolysis technology for a global market
 - Transferable knowledge of water electrolysis for H₂ production





INEOS roadmap

- Use existing co-product hydrogen while working with partners to develop hydrogen applications:
 - Chemical feedstock
 - Transport
 - Power/heat generation
- Build first intent hydrogen production in our chemical clusters in 7 European countries:



- Develop hydrogen storage projects
- Develop carbon capture and utilisation projects for the production of green molecules









Accelerating the use of H2 to support the drive to net-zero carbon emissions across Europe.

20MW electrolyser to reduce carbon emissions by

>22,000t

First intent hydrogen production in Norway: INOVYN Rafnes builds a clean hydrogen supply hub



Power to Methanol Antwerp

Sustainable methanol leading to a reduction of

>8,000t

Advancing the energy transition and its presence in the Port of Antwerp

A 7-strong consortium to produce CO2 p/a methanol from captured CO₂ HYDROGEN OXYGEN combined with H₂ generated from renewable electricity WINDTURBINES & **ELECTROLYSIS** SOLAR PANELS OF WATER **INOVYN Lillo's** _ POWER TO industrial-scale METHANOL ANTWERP BV STRIAL SCALE demonstration DEMONSTRATION METHANOL PLANT (NON FOSSIL) unit will produce ____ sustainable methanol ENERGY PLANT CAPTURED inovyn



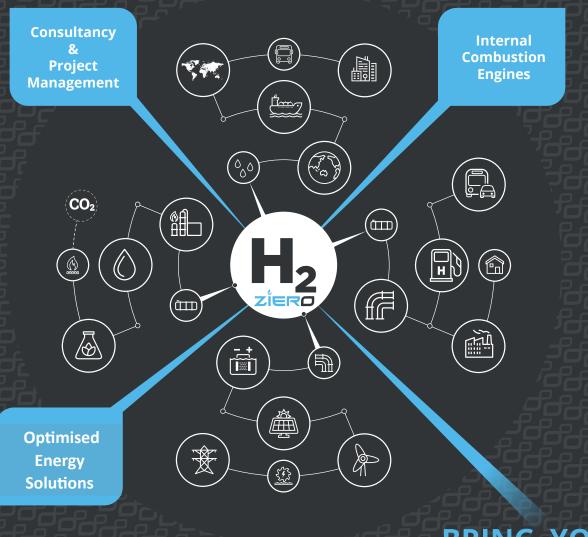












WE BRING YOUR EMISSIONS TO ZIERO

A TEAM OF DEDICATED EXPERTS WITH YEARS OF EXPERIENCE IN HYDROGEN & ALTERNATIVE FUELS

TEAM COMPETENCES

- Hydrogen & alternative fuels
- Internal combustion engines & drivetrains
- (Zero) Emissions
- Consultancy & project management
- Manufacturing engineering
- Regulations, CE-certification & safety support
- Product development
- Simulations, research & engineering
- Business & market development
- Connected with Thomas More & KU Leuven University Belgium



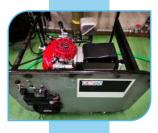
















SOME REFERENCE PROJECTS

- Bus running on a fuel mixture of hydrogen and CNG
- Opel Combo with internal combustion engine running on 100% hydrogen
- Volkswagen Caddy with internal combustion engine running on 100% hydrogen
- Test cell for ICE on hydrogen, complete certification and regulation of testcell and components
- Still Forklift with internal combustion engine running on 100% hydrogen, complete CE-certification and opperational for more than 1000 hours in a warehouse
- Protoype "Hybrid Hydrogen Unit": a 2 cilinder powering a generator, running on 100% hydrogen, internal hydrogen storage and ultracap unit for peak power outputs
- 1-cilinder power generator running on 100% hydrogen
- Business exploration studies for Hydrogen in the Benelux



WE BRING YOUR EMISSIONS TO ZIERO



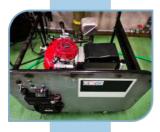
















HYDROGEN GENSET

RELIABLE TECHNOLOGY

The hydrogen generator, or H2 ICE genset, is the combination of a **hydrogen combustion engine** with an electric alternator to generate electrical energy. The setup is comparable with a diesel generator which runs on hydrogen instead of diesel fuel. The H2 genset will be **less complex and more reliable then Stage V diesel gensets** because it doesn't require complex and expensive after treatment systems.

100% HYDROGEN

The hydrogen engine of the H2 genset is designed and tuned to **run on 100% hydrogen** in order to avoid any toxic emissions. Therefore, there is no need for complex and expensive exhaust gas aftertreatment systems like catalysts, which require AdBlu-e, and particulate filters, as mandatory on conventional diesel gensets.

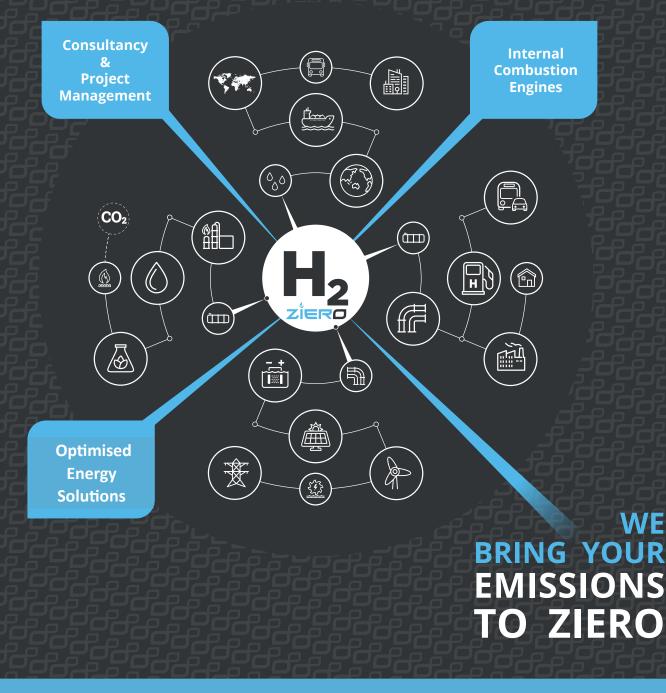
The Hydrogen Genset is a product of Ziero and will be available starting form Q1 of 2021



WE BRING YOUR EMISSIONS TO ZIERO

More Info: www.ziero.eu





Thank you for your attention! How can we help you?

Thomas Houben +32 473 83 13 36 Thomas@ziero.eu

More Info: www.ziero.eu

SEA-Invest

An ocean of opportunities

A leading stevedoring company in Europe and Africa

- Active in 25 ports in 8 countries
- 4.500 employees
- Annual tonnage: > 100 million tons
- Long term vision
- Partnership thinking
- Agile



SEA TANK TERMINAL 3,3 mio m3 storage in Europe and Africa

SEA-Tank Terminal locations in Europe & Africa

An ocean of opportunitie



- State-of-the-art storage and handling infrastructure for mineral and vegetable oil products, liquid fertilizers, molasses, fish oil, biofuels, base oils, light chemicals.
- Possibility for the customer to develop dedicated facilities or to adapt tankage in order to maximize the fulfilment of their needs.



SEA-Tank Terminal – PRODUCT & SERVICES

PRODUCTS:

- Petroleum products
- Base oils
- Biofuels
- Chemicals
- Oleo chemicals
- Sulphuric acid
- Liquid fertilizers
- Molasses
- Vegetable oils
- Animal fats / Fish oil

TERMINAL SERVICES:

- Ship to ship transfers
- In-Tank & In-Line Blending
- Heating
- Nitrogen blanketing
- Circulating, Homogenizing and Transfers
- Truck & Rail loading facilities
- Customs and excise bonded storage







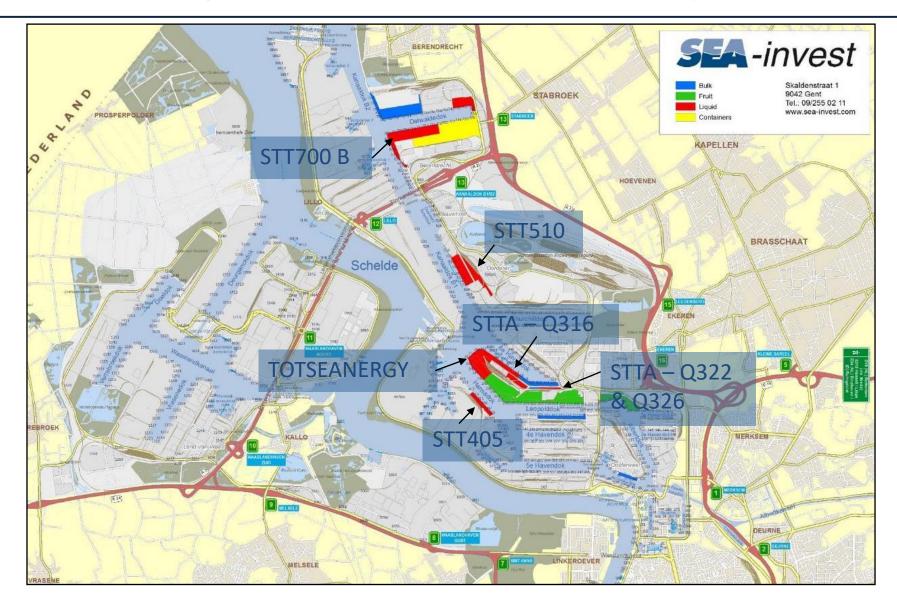
SEA-Tank Terminal Gent

- Chemicals, oleochemicals, vegetable oils, fish oil, fats, liquid fertilizers, biofuels
- Tank capacity 280.000 m³





Belgium – Sea-Tank Terminals in Antwerp



6

Antwerp – Q300 & TOTSEANERGY



SEA-Tank Terminal Antwerp – Quay 246 to 314

- Petroleum products
- Tank capacity 1.026.000 m³

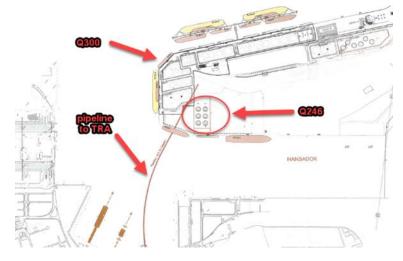
In ocean of opportunitie

- Additional storage capacity for bio fuels
- Projects renewable energy under study

TOTSEANERGY (JV) – Quay 246 –

- Tank capacity 160.000 m³
- 8 tanks of each 20.000 m³





Antwerp – SEA-Tank 510 - GLENCORE



Antwerp – SEA-Tank 700 B - LITASCO



SEA-Tank 510 (JV) – Quay 510

- Petroleum products
- Tank capacity 920.000 m³

SEA-Tank 700 B – Quay 700

- Petroleum products
- Tank capacity 750.000 m³

Antwerp – SEA-Tank Terminal Q316 - IMERYS

An ocean of opportunitie

Kaolin

- Tank capacity 16.500 m³
- 8 tanks ranging from 1.500 m³ to 3.000 m³



Antwerp – SEA-Tank Terminal Antwerp Q322

Fatty acids

Tank capacity 10.000 m³





Antwerp – SEA-Tank Terminal Antwerp Q326

- Sulphuric acid
- Tank capacity 33.000 m³
- 3 tanks of each 11.000 m³



Antwerp – SEA-Tank Terminal Antwerp Q405

- Petroleum products, biofuels, base oils, chemicals and oleochemicals
- Tank capacity 209.000 m³



An ocean of opportunities

Innovation and sustainable products

New technologies

- Best available technologies for terminals
- Zero emission (VOC) terminals



Innovation and sustainable products

Sustainable products

- Biofuels: FAME, ethanol,
- Feedstocks for HVO: greases, UCO's,...



An ocean of opportunitie

Allways looking for innovation and new products

An ocean of opportunitie

Investment opportunities

- Availability of concessions
- Looking for investment opportunities
- Involved in several potential H2 projects



Contact information

SEA-Tank Terminal commercial team at your disposal

An ocean of opportunitie

Georges Leysen georges.leysen@sea-tankterminal.com

Leen Taeldeman leen.taeldeman@sea-tankterminal.com

Luk Wuyts Luk.wuyts@sea-tankterminal.com



Air Products

An introduction to H_2 for Mobility

WIC 02.06.2021





Air Products Today

\$8.9 billion in FY20 sales

19,000+ employees

50 countries

~\$60B market cap

80 years in business

170,000+ customers

1,800 miles of industrial gas pipeline

750+ production facilities 30+ industries served





Air Products Benelux

- Rotterdam/Gent
 - Hydrogen production: HyCO4
 - Liquid hydrogen
 - O₂, N₂, Ar, liquid gases
 - Steam boilers (heat)
 - 200 km pipelines
- Haarlem/Vilvoorde/Keumiee/Zolder
 - Gas cylinders
 - Liquid gas sales
 - Spec gases







Hydrogen for Mobility and Energy

Decades of hydrogen production and distribution experience

Developing global infrastructure to support key trucking and bus transit applications

Providing safer, more reliable, and cost-effective solutions

4





Air Products H2 for Mobility Hydrogen fueling solutions – Buses and Trucks



Air Products: London Heathrow HRS, July 2020

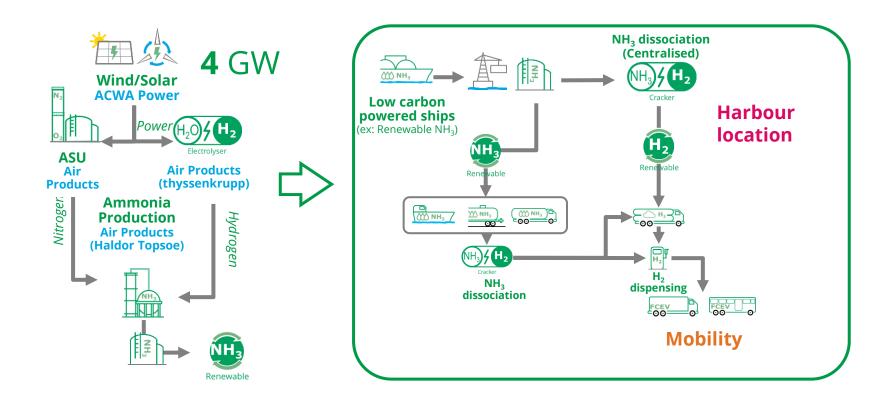


Air Products: London Heathrow HRS, October 2020



NEOM green hydrogen project

Supplying global Customers





Air Products Public

••••••



Thank you tell me more





John Cockerill's Hydrogen Solutions



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A strong history, a flourishing present, a promising future

Proud of its past, resolutely turned towards the future



Leader in the Renewable Energy Sector



700 references in boilers for gas-steam power plants
→ H2 potential



Solar thermal power plant 24/7 thanks to molten salt



Miris: the largest industrial pilot plant in Europe



On-shore & off-shore wind turbine maintenance



A wide range of green Hydrogen solutions

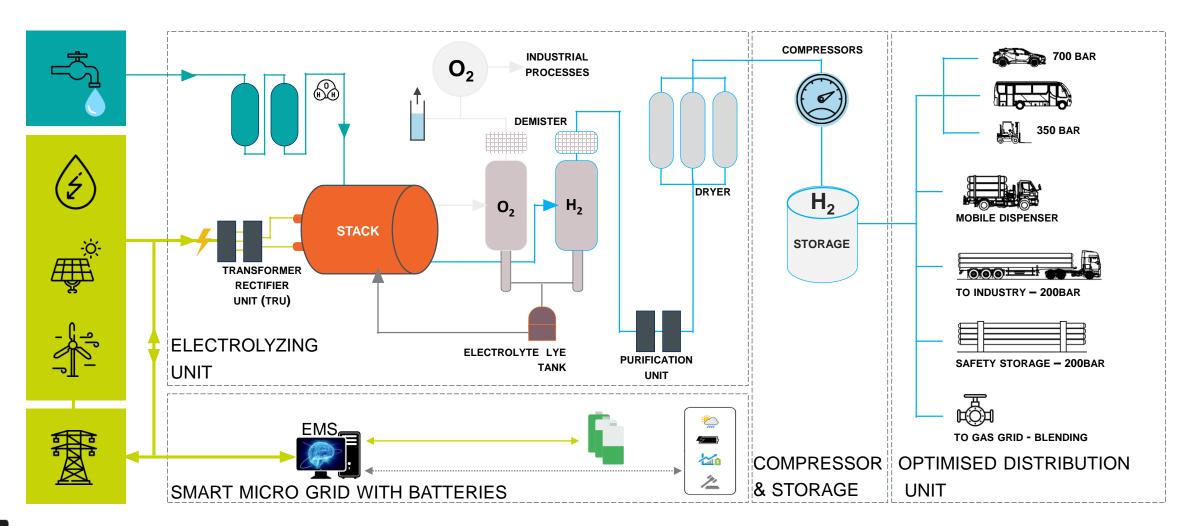
1 in the World In Electrolyser manufacturing

- Decades of experience in electrolysis and hydrogen, as well as pressurized and gas treatment equipements
- More than 1000 references in +30 countries in many different industries (chemicals / glassmaking / steelmaking / power plants etc.)
- ► Largest electrolysers in the market : **5MW per unit** (already 12 references)
- Manufacturing plants at the heart of China (350MW capacity) and under construction in Europe (1GW, phased scale up as from 2023)
- ► Focus on very large scale production with solutions at 100MW and 1GW
- ► Massive €100M investment plan in H2 developments and R&D
- ► **Mobility** and refueling stations equipments and projects





John Cockerill in the H2 Value Chain



2

Largest Single-Stack Electrolyzers

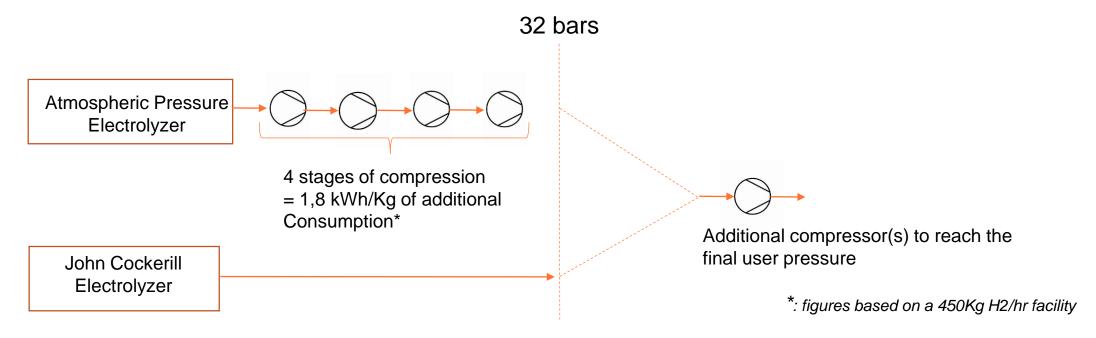
John Cockerill is the world leader in large scale electrolysis with already 26 x 5MW stacks references



1200m3/hr single stack electrolyzer to feed a HRS for the 2022 Winter Olympics



Pressurized vs Atmospheric electrolyzers



Key benefits of a pressurized electrolyzer:

- 3,5 % Electric Consumption gain (compared to stack only)
- Higher reactivity to capacity variation requests
- Decreased footprint
- Less maintenance
- Higher H2 plant availability

Manufacturing capabilities



- Modern workshops in China dedicated to large capacity electrolyzer production (inaugurated in 2019) with 350MW annual capacity
- New manufacturing capacity under construction in France and Belgium with capacity starting at 200MW/year in 2023 and ramping up to 1GW

Columbus: e-methane production

Partnership with Engie and Carmeuse



- 75MW of electrolysis producing green H2
- Use of new lime kiln CO₂ in waste gases to produce emethane
- 900,000 tons of CO₂ emissions prevented during the first 10 years



HaYrport ®: a multi-modal refueling station





John Cockerill Hydrogen

hydrogen@johncockerill.com

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WaterstofNet

H other

Powering the Future

Prepared for : WaterstofNet June 2021 Devon Hyver, Sales Director Europe <u>dhyver@plugpower.com</u> +33.6.48.47.27.63

 \bigcirc



Plug Power 2024 Vision

\$1.7B



50% Green H2 Cash flow \$5B

\$250M Adjusted EBITDA

2024



+125,000 GenDrive Cumulative Deployments



The ABC's of Plug Power to achieve 50% Green H2 and \$1.7B revenue by 2024			Recent Achievements
	A	1997 : Strong R&D focus and technology leadership position for next decade in PEM fuel cells	Executed strategic acquisitions to accelerate vertical integration
	В	2008 : integration of fuel cells for forklifts in the material handling and GSE industry. Strong early successful deployments of PEM fuel cell solutions in logistic ecosystem.	Established joint ventures and strategic partnerships, including expansion with Renault (EU), SK Group, and Acciona (EU)
	С	2014 : Turnkey hydrogen solutions that accelerated growth and repeat blue chip customers in Walmart (40), Amazon (50), IKEA, Carrefour, BMW, Fedex, DHL and many others	Strengthened balance sheet with over \$5B of capital to accelerate growth
In numbers			amazon Walmart * FCA
	50,000	FCs and over 25,000 electrolyzers 180 patents 125 sites	Mercedes-Benz
	695millions hours of operation 450 dispensers 40 tons H2 daily		
1. Based on F		rom <1kW to multi-MW PEM fuel cell and electrolyzer solutions	

The Leader in Fuel Cell Technology

Plug Power has been innovating the design and manufacturing of **PEM Fuel Cells and stacks** for over 20 years.

In 2020 the company announced the construction of a new facility to accelerate the manufacturing of PEM fuel cells and stacks at

1.5GW capacity

Plug Power's Gigafactory will be the largest fuel cell manufacturing facility in the world when it enters production in 2021

From 1.33 Cells to 7.48 per 1cm



GenKey : Resilient Zero-emission complete Solution WIND ΡV BATTERY DC BUS DISTRIBUTION H₂ Η, **G2P FUEL CELL 2MW PEM ELECTROLYZER** up to 120MW H₂ STORAGE **Plug Power Solution** VAN, FORKLIFT & VEHICLE fuel cells ready by PlugPower



The Leader In

Hydrogen Energy Solutions : GenKey

Plug Power is the world's most comprehensive hydrogen energy services provider.

Our 2020 acquisitions of Giner ELX and United Hydrogen expanded our product capabilities and positioned Plug to transition from low carbon to zero carbon hydrogen solutions.

Our vertical integration strategy positions the company as the global leader in generation, liquefication, distribution and dispensing of hydrogen.



Plug Electrolyzer up to 120MW

Generating green hydrogen through electrolysis for local, regional or OffShore applications



Plug Hydrogen

National distribution of liquid hydrogen to end users to ensure constant supply



GenFuel Supply 125 sites

Turn-key service that provides reliable hydrogen distribution and supply



GenCare Services 24/7

Fully monitoring service network for real-time fault detection and ensured uptime



PlugPower in Europe **European sites**

Strong local presence with our dedicated service technicians

European Service center in Belgium :

- 20 FTE in EU

Deploying 6 sites now in Europe

JV with RENAULT and ACCIONA







The Leader In Your Fuel Cell for all Applications

Plug Power provides the world's most extensive suite of fuel cell engines and application specific platforms in the world.

Our history of innovation spans applications in material handling, stationary backup, engines for transportation and even aerospace.

By enabling faster charging, consistent power during operation, longer ranges and higher cargo capacities our fuel cells replace batteries in most electric vehicle applications.



GenDrive

Fuel cells for material handling in warehousing, distribution and manufacturing



GenSure

Stationary backup power for datacenter, utility and other mission critical applications, GenSet





ProGen Engines

Fuel cell systems for a wide range of transportation and mobility applications

ProGen Aerospace

Fuel Cells extend runtime and range of UAVs, Drones and Passenger aircraft



> Plug Power Fuel Cell Platforms

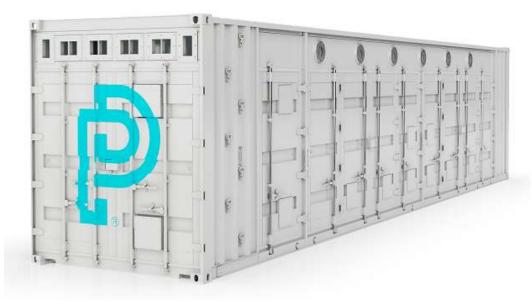
GenSure HP : H2 Genset for Stationary Backup up to 2MW

Backup for mission critical applications

Eliminates diesel emissions

Reduced maintenance

Increases reliability





> Plug Power Fuel Cell Platforms

ProGen Engines for Mobility

Fuel cell engines for Electric Vehicles

Reduce charging / refueling time

Increase cargo capacity

Increase range



PROGEN : The Leader In Fuel Cell Platforms

EPOD	< 5 kW		Drones UAVs	
ProGen	15 – 30 kW	and a	Robotics Airport Ground Support Equipment	
ProGen	30 – 60 kW	Constant of the second se	Class 3-5 Trucks Buses & Class V Forklift Trucks	
ProGen	85 - 500 kW	onter a	Class 4-8 Trucks Full-size Buses & Class V Forklifts	
ProGen Systems	100 kW to multi-megawatt	Power	Microgrid and Storage GenSet, Data Center Backup	
				hydrogen

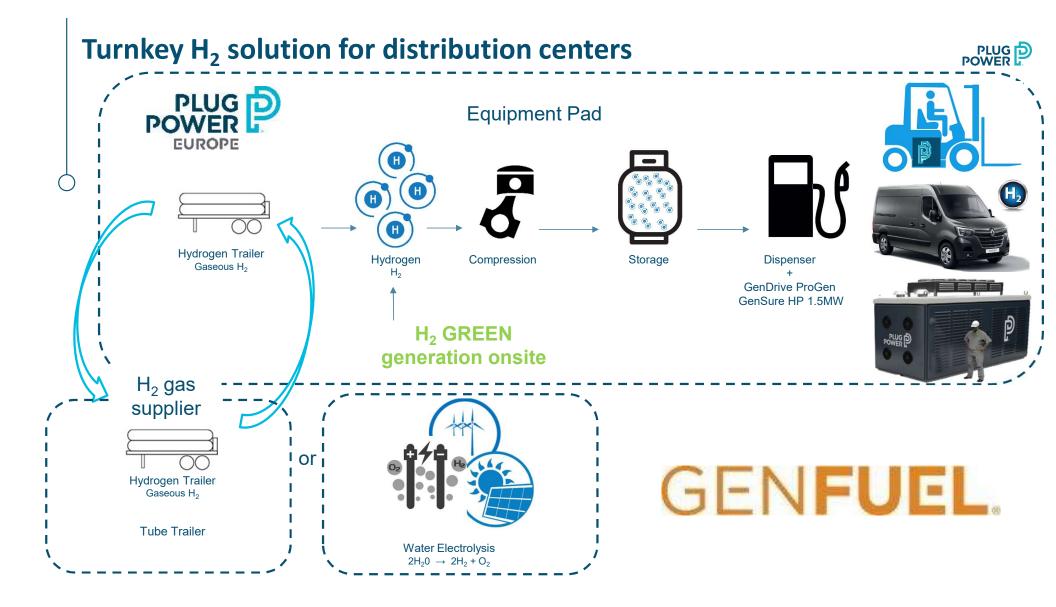




Notes



PLUG





> Plug Power Fuel Cell Platforms

GenDrive for Material Handling

Directly replace lift truck batteries

Eliminate battery removal and charging

Increase operator productivity

Eliminate battery room







Material Handling

Operational Advantages

Operate lift trucks at full capacity, free up valuable floor space, and increase operator productivity



15 to 25%

increased productivity



Higher Productivity

Higher Efficiency

Environmental Benefits

Source: Customer case studies

Plug Power

Thank you

Corporate HQ 968 Albany Shaker Rd Latham, NY 12110

Devon Hyver, Sales Director Europe <u>dhyver@plugpower.com</u> +33.6.48.47.27.63 PLUG



Hydrogen developments in the Netherlands

Jörg Gigler



June 2 2021 Presentation for WIC WaterstofNet



Contents

- 1. National Hydrogen Programme (NWP)
- 2. National Growth Fund
- 3. National Project Overview



1. National Hydrogen Programme (NWP)

Background NWP

Climate Agreement (2019) and Govenrment Strategy on Hydrogen (2020): Need for a national programme

Cross-sectoral Working Group on Hydrogen (CSWW)

Consisting of and representing the Dutch stakeholder-community

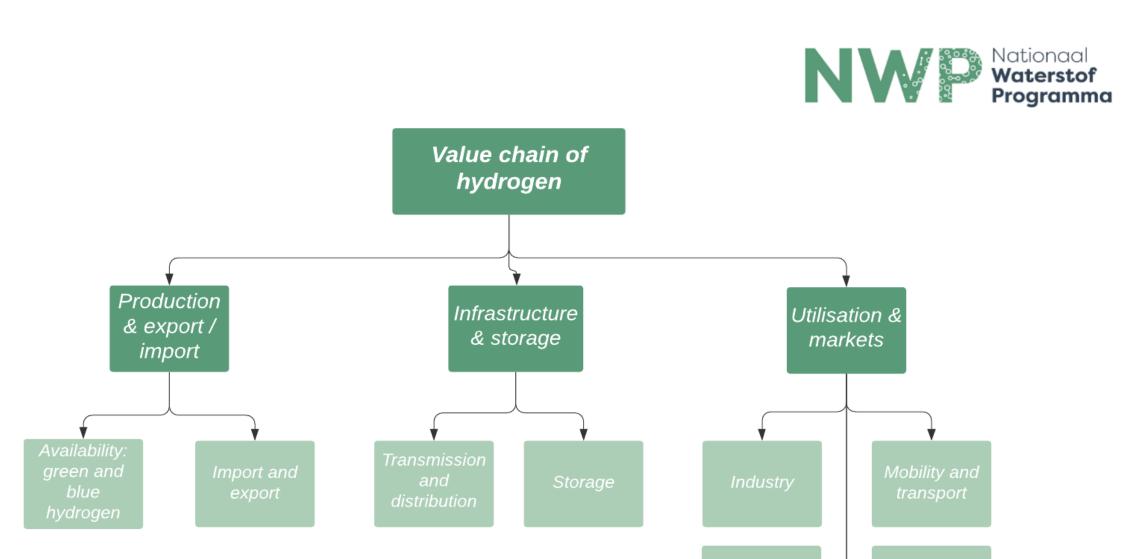
Request to CSWW

Construct a working plan for the NWP for the period 2022 – 2025, with a glimpse towards 2030. To be delivered July 2021

Main question

How can hydrogen contribute to realising the energy transition in The Netherlands







	Verdieping structuur NWP	Notionaal Waterstof
	CSWW Februari 2021	Programma
Thema	Beschikbaarheid: groene en blauwe waterstofproductie Import en export Construction Copslag Industrie Mobiliteit en transport	Gebouwde omgeving Elektriciteitsproductie
	Investments	
	National and European regulation en certification	
	(Inter)national collaboration and coordination	
	Framework for efficient and effective use of hydrogen	
Doo	Hydrogen market	
rsnijd	Manufacturing industry (inc. supply chain)	
ende a	Societal support and impact	
Doorsnijdende aspecten	Safety	
ten	Regional collaboration and coordination	
	Human Capital Agenda	
	Innovation	
	System integration	

Approach and process

Themes round 1 (March - April)	Questions	Themes round 2 (April - June)
 Production Import & export Infrastructure & storage Safety Manufacturing industry Use: industry Use: mobility Use: electricity production 	 Describe IST and SOLL Activities Cohesion Organisations Deliverables Monitoring 	 Societal issues Regional collaboration & coordination Framework System integration Innovation Use: built environment

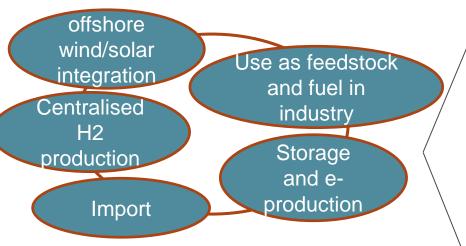
Other themes

• Regulation & certification, instrumentation, market & trade, international collaboration, ...

www.nationaalwaterstofprogramma.nl

Preliminary results

1a. Large scale development of hydrogen chains in industry clusters (now) and (later) for electricity generation (back-up) Objective: scale up of production and use



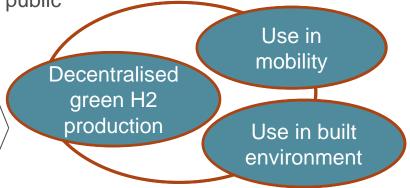
- 1b. Built-up, demonstrate and facilitate rollout in industry clusters and harbours
- Develop infra (backbone) and storage
- Develop international connections

Vationaal **Waterstof** Proaramma

- / 3. Create the right conditions
 - Develop policy instruments
- Develop markets
- Work on safety
- Set-up certification
- Start manufacturing industry
- Support systeem integration
- Investigate blending
- Support innovation
- Create framework
- Promote internationaal collaboration
- Develop HCA

2a. Decentralised development of

hydrogen chains for mobility, built environment and smaller scale industry Objective: develop production and use of hydrogen, integrate this and involve the public



- 2b. Demonstrate, integrate and facilitate roll out in regions
- Develop local infra and storage
- Create public awareness and involvement

www.nationaalwaterstofprogramma.nl

2. National Growth Fund



Nationaal Groeifonds



2. National Growth Fund

"Groenvermogen van de Nederlandse economie"

- Applicants: Topsectors Energy, Chemistry and HTSM
- Volume: approx. 2 billion euro
- Requested subsidy: approx. 730 miljoen
- Received (conditional): 338 miljoen
- Topics: innovation, HCA, demo projects
- Start: Autumn 2021?





3. National Project Overview





3. National Project Overview: 130+ projects!

20 MW Electrolyser



H2 storage in caverns



Hydrogen valley



20 hydrogen buses



H2 in homes



Hydrogen trucks



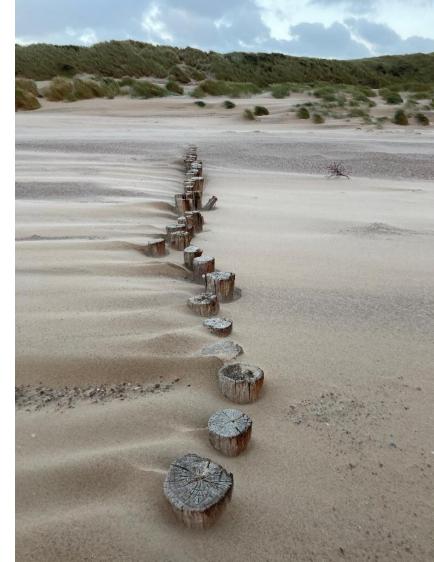
Summarising



- Great dynamics around hydrogen
- Everyone is searching for stepping stones towards implementation: many obstacles to overcome
- All efforts count but final words lie within new
 Dutch government coalition

Thank you for your attention

Jörg Gigler, TKI Nieuw Gas / CSWW (jorg@gigler.nl - 06 4525 1571 - topsectorenergie.nl)





Developments in the WIC





- > (New)member info
- Status working groups
- Networking & meetings
- News from the governments FL-B-NL
- Feedback cabinet contacts Flanders
- Overview FL/BE/EU funding

NEW MEMBERS SINCE PREVIOUS MEETING MARCH









Making our world more productive





WIC STATUS: VALUE CHAIN





STATUS WORKING GROUPS





Evaluation & statements Related to EU or national legislation

Mobility

Monitoring and facilitating H2 refuelling stations in Benelux. Increase utilisation.

Shipping



Development of H₂ pilots & infrastructure (coll. With De Blauwe Cluster)

 H_2 for all



Disclosing the world of $\rm H_2$ to the broader public

WORKING GROUP POLICY





Evaluation & statements Related to EU or national legislation

- Recent activities: Cabinet visits Flanders
- To do coming period:
 - Provide input for follow-up actions of the cabinet visits
 - Consultation REDII translation to Belgian Law \rightarrow RE in transport obligations

WORKING GROUP SHIPPING



Development of H₂ pilots & infrastructure for shipping

In collaboration with



- Recent activities:
 - Knowledge-exchange and matchmaking sessions
 - Questionnaire on desired follow-up
- To do coming period:
 - \Rightarrow Identify project ideas
 - \Rightarrow Inventory of hydrogen sources for shipping initiatives
 - \Rightarrow Gather info on legislative framework
- Next meeting June 10

WORKING GROUP H2 FOR ALL





Disclosing the world of H₂ to the broader public

- Recent activities:
 - Kick-off meeting with small group: defining the objectives
 - Second meeting with small group: choosing the means
 - Updated and more visually attractive information on the website
 - A podcast
- To do coming period:
 - \Rightarrow Review existing information on website and elaborate
 - \Rightarrow Record first podcast episode
 - \Rightarrow Third meeting: feedback on the progress

EU "DICTIONARY"





Helping our WIC members to stay on top of the game

- Medium-short "explainer" articles on Brussels' hot topics/concepts, such as:
 - Carbon Contracts for Difference
 - The different associations (the European Clean Hydrogen Alliance, Hydrogen Europe, Clean Hydrogen for Europe, etc.)
 - Additionality
 - Etc.
- Aimed at giving a thorough yet concise explanation of the concept and its context in accesible language
- The documents will be made available on the members' portal and will be updated regularly

WORKING GROUP MOBILITY





Monitoring and facilitating H2 refuelling stations in Benelux. Increase utilisation.

- Group of 18 companies
- Recent activities: kick-off meeting on 26/5
- Five goals/objectives:
 - ✓ Create a detailed roll-out plan a follow-up for Netherlands and Flanders
 - $\checkmark\,$ Monitoring, exchanging "data and experiences" of HRS and FCEV
 - $\checkmark\,$ Efficient, short, uniform and transparant approach of opening a HRS
 - ✓ Increase utilisation HRS
 - ✓ Communication to stakeholders
- To do coming period: develop goals into deliverables
- Follow up meeting: September 7



FEEDBACK CABINET CONTACTS FLANDERS/BELGIUM



Cabinet visits March-April 2021

	VLAAMSE KABINETTEN		
	Topics	Status	Follow up actie
	Studie VEKA import waterstofderivaten	Lopend	Navraag stand van zaken september 2021
Zuhal Demir (Omgeving & Energie	Update VEKP (met grotere rol H2)	On hold	Evaluatie in 2023. Navraag update begin 2022
Zunai Demir (Omgeving « Energie)	Uitrol hernieuwbare energie ook voor productie H2	Lopend	Moeilijk hierop te wegen vanuit WIC
	GO's uitwisseling met Nederland	Lopend	Navraag stand van zaken september 2021
	Aanpassing VLAREM vergunning HRS	Lopend	Navraag stand van zaken mei 2021
	Topics	Status	Follow up actie
	Vlaamse waterstofstrategie - bevoegdheidsverdeling VL - BE	Lopend	Navraag stand van zaken mei 2021
	Vlaamse waterstofstrategie - opstart gesprekken middenveld inc	Lopend	Navraag stand van zaken mei 2021
lilde Crevits (Economie & Innovatie	Definiëring 0&0 noden waterstof	Lopend	Eigen actie WaterstofNet
inde Crevits (Economie & innovade	Uitbreiding Ecologiepremie+	Lopend	Navraag stand van zaken mei 2021
	OPEX-steun	Lopend	Ligt bij EU, begin 2022 polsen naar stand van zal
	IPCEI-traject	Lopend	Navraag naar plannen "tweede wave" begin 202
	Vlaanderen oofinanciering ETS-IF	Lopend	Navraag stand van zaken mei 2021
	Topics	Status	Follow up actie
tthias Diependaele (Verkeersfiscali	Verlaging/vrijstelling van de kilometerheffing voor emissiearm/er	Lopend	Navraag stand van zaken mei 2021
	Fiscale korting kan gegeven worden op de CAPEX	Lopend	Navraag stand van zaken mei 2021
	Topics	Status	Follow up actie
Lydia Peeters (Mobiliteit)	Clean Power for Transport plan	Lopend	Navraag stand van zaken mei 2021
Lydia Feeters (Mobiliteit)	Waterstofprojecten bij De Lijn	Niet gestart	Blijft moeilijke aangelegenheid
	Eurovignet richtlijn	Lopend	Navraag stand van zaken mei 2021
	Topics	Status	Follow up actie
n Jambon (MP en Buitenlandse Zake	H2 samenwerking Noordrijn-Westfalen	Lopend	Navraag stand van zaken september 2021
	Samenwerking rond import via FIT/Belgische ambassades	Lopend	Navraag stand van zaken september 2021
	BELGISCH FEDERALE KABINETTE	N	
Pierre-Yves Dermagne	Topics	Status	Follow up actie
(Economie & Verk)	Technische uitwerking relanceplan	Lopend	Navraag stand van zaken mei 2021
Thomas Dermine (Relance)	Call for projects reductie CO2 gascentrales	Lopend	Navraag stand van zaken september 2021
montas Bernine (Helanoe)	Offshore energie eiland in de Noordzee	Lopend	Navraag stand van zaken september 2021
	ononore energie enana in de hoordzee	Lopend	realizing stand for catch september coer
	Topics	Status	Follow up actie
akia Khattabi (Klimaaten Green Dea		On hold	Evaluatie in 2023. Navraag update begin 2022
	Koolstoftaks	Lopend	Navraag stand van zaken begin 2022
	Topics	Status	Follow up actie
	Nationale waterstofstrategie	Lopend	Navraag stand van zaken mei 2021
Tinne Van der Straeten (Energie)		Lopend	Navraag stand van zaken september 2021
	Description of the description of the second s	1	Manager and the active and the second s

- Digital meetings with all relevant Flemish and Belgian federal cabinets/administrations
- WaterstofNet + mixed teams from the policy group
- Open and fruitful discussions
- Short term follow up on topics: WaterstofNet
- Q1 2022: new cabinet visits FL

H2 NEWS FROM OUR GOVERNMENTS (FL/BE)



Van der Straeten wil van België de waterstofhub van Europa maken



Minister van Energie Tinne Van der Straeten (Groen) Beeld Aurélie Geurts

Minister van Energie Tinne Van der Straeten (Groen) wil van België dé waterstofhub van Europa maken. Nog voor de zomer wil ze met een strategie komen die het potentieel van ons land daarvoor optimaal moet benutten. Dat heeft de groene minister verklaard naar aanleiding van een studie van Deloitte en de FOD Economie over de rol van gasvormige energiedragers in een klimaatneutraal België. May 18:

Kick-off of study FOD economy and Deloitte "Towards a climate neutral Belgium: the role of clean gas"

=> Belgian H2 strategy to be expected before the summer

Total budget BE for H2: 330M€ FL: 125M€ WL: 110M€ BE: 95M€

H2 NEWS FROM OUR GOVERNMENTS (NL)



- Development of 'Nationaal Waterstofprogramma' (presentation Jörg Gigler)
 - Visit the website at <u>Nationaal Waterstof Programma</u>
- "Nationaal Groeifonds": 338M€ for H2 and green chemistry
- Demissionary cabinet having impact on earmarking of H2 budget
- Dutch ministry of Infrastructure and Water Management aim for clean and quiet taxis by 2030.
- Q3 2021: meetings of Waterstof Industry Cluster with Dutch government

H2 NEWS FROM OUR GOVERNMENTS (FL/NL)

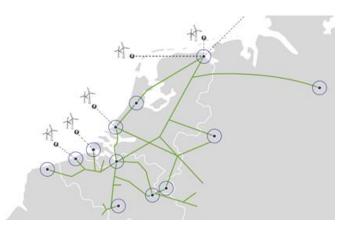


IPCEI-process : match-making phase To be submitted by Germany in July





Figure 4.1. Announced large-scale electrolyser plants in the region²



OVERVIEW EU/NL/B/FL FUNDING



Funding		Submission	Funding			
programme	Region	deadline	amount	For who	Theme	Website
EIC Transition Challenges 2021 (HORIZON-EIC-2021- TRANSITION- CHALLENGES-01)	EU	19 May 2021 until 22 September 2021 17:00:00 Brussels time	40.5 M€	Check the website	The proposals are expected to develop energy storage technologies or combined energy harvesting/storage technologies ready for investment and business development, with the perspective to capture specific systems integration opportunities.	https://ec.europa.eu/info/funding- tenders/opportunities/portal/screen/opp ortunities/topic-details/horizon-eic-2021- transitionchallenges-01-02
LIFE	EU	Mid-june 2021	0.9 billion€ for sub- prograam "clean energy transition"	 Project beneficiaries are 1/3 private enterprises 1/3 NGOs and civil society organizations 1/3 public authorities 	Financing climate, nature, and environmental projects. The subprogram "Clean energy transition" is relevant for us.	LIFE (europa.eu)
Climate, energy and mobility cluster 5 - Horizon Europe	EU	Soon to be open	303.8 M€	Companies, research organizations	 Areas of intervention: 1. climate science and solutions 2. energy supply 3. energy systems and grids 3. buildings and industrial facilities in energy transition 4. communities and cities 5. industrial competitiveness in transport 6. clean, safe and accessible transport and mobility 7. smart mobility 8. energy storage 	

Check the portal for regular updates <u>Downloads (waterstofnet.eu)</u> \rightarrow Overview of the existing funding opportunities

OVERVIEW EU/NL/B/FL FUNDING



Funding		Submission	Funding			
programme	Region	deadline	amount	For who	Theme	Website
DEI+	NL	January 18, 2021, 9:00 AM until January 7, 2022, 5:00 PM	76.6 M€ - an extra 9 M€ for natural gas-free built environment		infrastructure; other CO2 reduction	https://www.rvo.nl/subsidie-en- financieringswijzer/demonstratie-energie- en-klimaatinnovatie-dei/themas-dei-2021
SDE++	NL	21/09/2021 till 15/10/2021	5 M€		The subsidy scheme SDE++ (Incentive Scheme sustainable energy transition) must make an important contribution to reducing CO2 emissions by 49% by 2030.	
TKI New Gas Hydrogen Technology	NL	June 8, 2021 - deadline for the submission of "Expression of Interest"; September 15, 2021 - deadline for the full proposal submission	3 M€		hydrogen; 5. Fuel cell technology; 6. Burner	https://www.topsectorenergie.nl/nieuws/ subsidieregeling-voor- waterstoftechnologie-geopend
TSE studies industry	NL	January 18, 2021 9:00 am until September 7, 2021 5:00 pm	8 M€	investigate the feasibility of an innovative pilot or demonstration project that can cost-effectively reduce	other CO2-reductions measures in	<u>https://www.rvo.nl/subsidie-en-</u> financieringswijzer/topsector- energiestudies-industrie



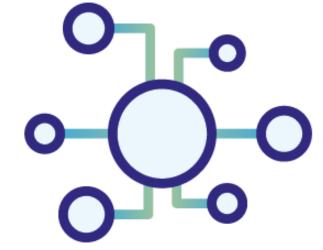
Funding programme	Region	Submission deadline	Funding amount	For who	Theme	Website
Versnelde klimaatinvesteringen industrie	NL	September 1, 2020 9:00 AM until December 14, 2021, 5:00 PM	28 M€	entrepreneurs who want to take CO2-saving measures within thir company, the effectiveness of which has been proven, but they are running into too high investment costs and the payback period is longer than 5 years.		<u>Versnelde klimaatinvesteringen industrie</u> aanvragen RVO.nl Rijksdienst
Hernieuwbare Energietransitie (HER+)	NL	April 1, 2021, 9 AM until March 31, 2022, 5 PM		entrepreneurs/organisations	HER+ follows the categories of the current scheme Stimulating sustainable energy production and climate transition (SDE ++).	https://www.rvo.nl/subsidie-en-
TSE industry	NL	6 July 2021, 09:00 till 14 September 2021, 17:00 uur	The budget for TSE Industry is 6.36 M€. The maximum subsidy per project is 500,000 €.			<u>https://www.rvo.nl/subsidie-en-</u> financieringswijzer/tse-industrie
ConnectSME		Call open between 1/9/2020- 31/12/2022	36 innovation projects receive "in-kind" vouchers of the value 10.000 € and in the second selection round 18 projects receive a second voucher for the value of 40.000 €			

AGENDA MEMBER INFO & NETWORKING

- Meet & Greet, July 1
- Cluster meetings, next on September 8
- WIC Webinar, next edition on September 30
- > Working visit Groningen (TBC) October 6 7 8
- Conference in November (TBD)
- Online event "Emerging offshore technologies: June 8-15-24

Production of green electrons & molecules at sea" with







HyVolution 2021 @ Paris October 27 and 28

- Large scale hydrogen event for energy,
 industry and mobility with 120 exhibitors
 & brands and over 2000 visitors
- Participation with WaterstofNet/WIC still possible via a shared booth (4 sqm for 1.500€)
- Interested? Contact Yannick











Agfa launches its high performance ZIRFON UTP 220 membrane for the production of green hydrogen Mortsel, Belgium | May 5, 2021 11:00 AM CET

News from Cluster Members



Colruyts en VoltH2 bouwen waterstoffabriek in Terneuzen



De haven van Gent, die samen met die van Terneuzen de North Sea Port vormt. ©BELGAONTHESPOT



Questions & Comments?





May 6, 2021

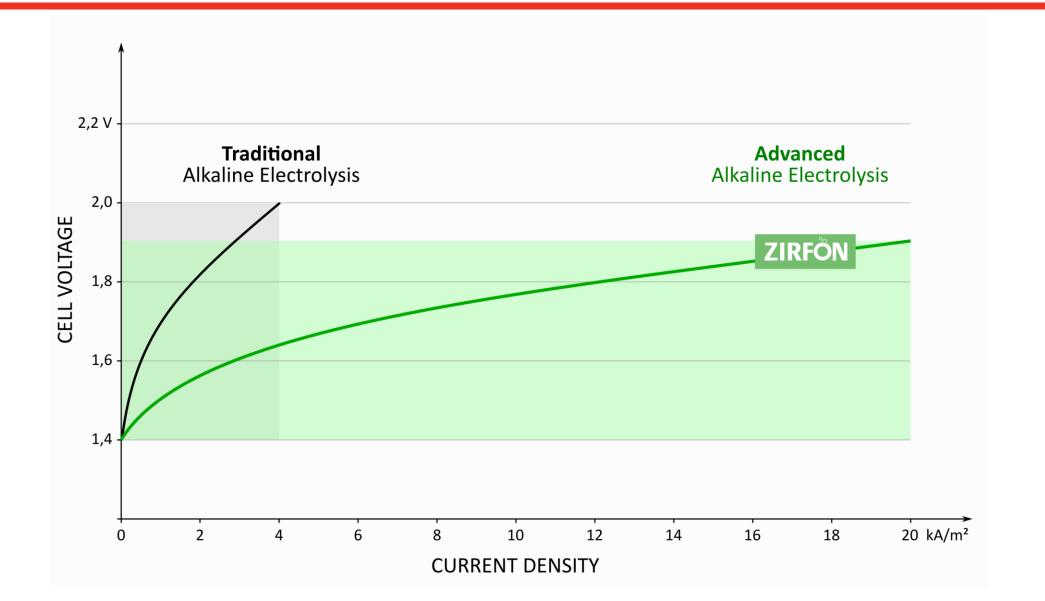
Agfa has announced the launch of its high performance ZIRFON UTP 220 membrane for the production of green hydrogen and herewith contributes once more to lowering the cost of green hydrogen production.

The new ZIRFON UTP 220 has excellent durability and its low resistivity allows for the highest yield of hydrogen production, setting yet another standard for advanced Alkaline ElectroLysis (AEL).

ZIRFON UTP 220 adds to the existing UTP 500+ and UTP 500 membranes in Agfa's portfolio. As recently revealed in a report by the Fraunhofer Institute, their use makes AEL the most efficient technology for the production of hydrogen.

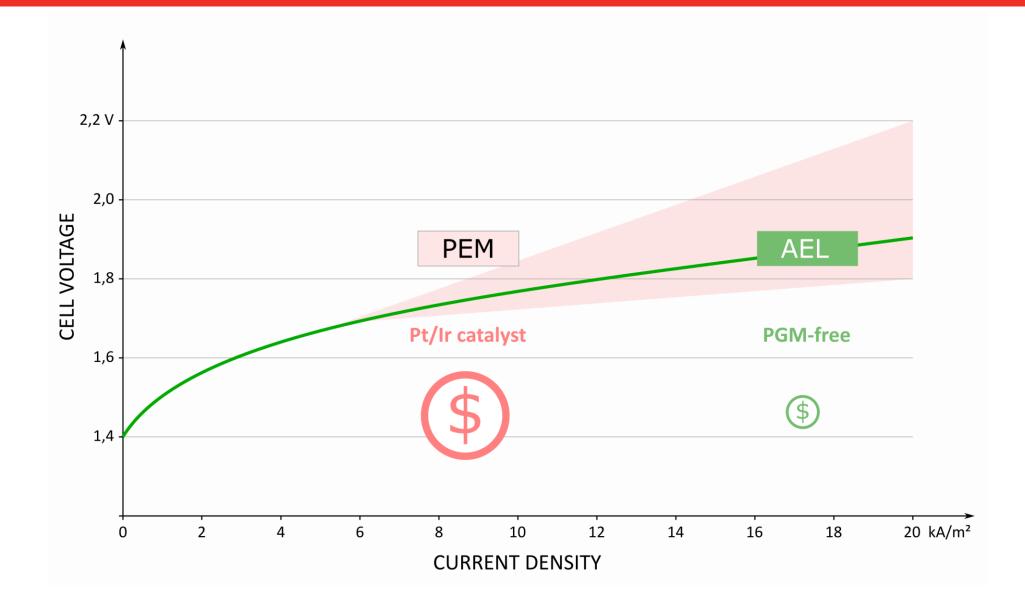


Alkaline ElectroLysis (AEL) has improved performance by 400%



AGFA 🛷

ZIRFÖN Advanced AEL now equals performance of PEM at lower cost



AGFA 🛷

H₂ ADVANCED