

2010

New Energy World - Industry Grouping
Annual Report



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1 FOREWORD FROM CHAIRMAN



Gijs van Breda Vriesman
Chairman of the Board

Dear Industry Grouping Members,

Looking at the year 2010, the New Energy World Industry Grouping was finally able to harvest some benefits from a three year period of investing time and effort in setting up the Joint Undertaking. Our patience was rewarded. The Joint Undertaking signed grant agreements for projects worth over EUR 160 million and launched an even larger call for proposals for more projects.

The undertaking also became autonomous, after the Industry and Research Grouping finally agreed on the funding of the Programme Office. Furthermore, 18 staff were recruited out of more than 1000 applicants, with a single purpose of making the Joint Undertaking and its programme run like clockwork.

Lastly, the Industry Grouping pulled an unprecedented advocacy study that underpinned the importance of our technology for de-carbonizing transport in Europe. Some early results show that governments ranging from Japan to the UK read the material carefully. Policies are starting to include fuel cell electric vehicles in their sustainable transport strategies.

Perhaps, we have more on our wish list: an improvement of the funding percentages for the projects as well as more frequent, effective, visible communication to a wide range of stakeholders; or a kick off of the stationary fuel cell commercialisation plan. These activities are still to come in 2011 alongside a serious attempt to develop a fuel cell and hydrogen technology breakthrough vision and a roadmap for 2020.

In 2010, we had a first refreshment of the Board. Further changes will take place by the end of March 2011. There is a lot interest in these Board seats, which is a sign of a healthy Industry Grouping. I think a very good team will be taking the Industry Grouping to a next level; ever closer to commercialisation and breakthrough of the technology by the middle of this decade.

This report is worth a good read. It is both a good testimony of 2010 and describes what we need to make happen in 2011. Our FD Blueprint Secretariat is "manned" by an excellent team and they form the engine behind the Board and the Grouping. They have been a great support and I would like to thank them for that.

Yours sincerely,

A handwritten signature in white ink on a blue background. The signature is stylized and appears to read 'GJBaill'. It is written over a faint grid pattern.



2 EXECUTIVE SUMMARY

2.1 The NEW-IG in 2010

After a year of internal organisation and release of the first call in 2009, in 2010 the NEW-IG focused on commercialisation. Particular efforts were made in the field of car passenger transport; with others contributions to the European Strategy for Clean and Efficient Vehicles; and participation in the expert-group for alternative fuels. A significant milestone supported by NEW-IG was the release of the EU Power-train Report. The report clearly demonstrated the important role of fuel cell electric vehicles in a future portfolio of power-trains.

Another important strand of activity was the recruitment of staff for the JU Programme Office, including the new executive director. As from 15th November 2010 the JU FCH reached its status of independent body, which completed the process of setting up a joint (public/private) partnership.

The NEW-IG Board also worked hard to complete the last part of proposed bylaws changes and clarified the Board election system as well as committee structure. Another change of bylaws was needed to implement the so-called project contribution. This system whereby beneficiaries of grants, regardless of them being a member or not, contribute an amount equivalent to 4% of the grant attributed. This scheme underpins the financial contributions from N.ERGHY and NEW-IG to the running cost of the Programme.

2.2 The 2009 Call – Results

The total budget of the 2009 Call was €71.3M. A total of 50 proposals were submitted and 31 were eligible to be evaluated. This involved a total of 395 organisations, an increase of 62% from the 243 from the previous year. Of the 395, 46% were from the Industry. Negotiations closed officially in December 2010, awarding €72.5M to 28 proposals. Of the grant's amount, 57% was awarded to the industry, although they were 71% of participants.

2.3 The 2010 Call - Organisation, Information

The 2010 Call officially opened on 14th July 2010.

In preparation, the NEW-IG invited experts from the PO to attend the General Assembly of 6th September to give members information on the past Calls and advice on to how to produce quality proposals and overcome the most common barriers to getting funds. On 17th May 2010, the NEW-IG together with N.ERGHY organised a Brokerage Event in Essen, in parallel to the WHEC, with the objective to facilitate the formation of consortia across the different Call topics. Using the NEW-IG Weekly Monitoring Report, the Secretariat also distributed ad-hoc requests from non-member companies that approached the Industry Grouping looking for partners in specific areas.

By end of 2010 the PO made some preliminary data available for the third Call. A total of 71 consortia submitted proposals. The Industry composed 51% of the 559 organisations that responded to the Call and applied for 59% of the total €230.6M grant requested.

“BEVs and FCEVs have the potential to significantly reduce CO₂ and local emissions.”

(A Portfolio of power-trains for Europe: a fact-bases analysis)

2.4 AIP 2011 - 2011 Call

Preparations for the Call 2011 with the highest amount of funds in the MAIP 2008-2013 were already initiated in October 2010. Industry Working Groups worked together with their Research Grouping counterparts to align on recommendations for the AIP 2011. The Call is expected to open at the beginning of May 2011, starting earlier by several months compared to previous years.

2.5 Bylaws, membership, project-contribution

In 2010 another bylaws-change was realised in order to clarify the procedure for Board-election and to reduce the actual number of Committees more in line with current stakeholder, research and broader market dynamics. Internal rules were developed to detail the procedure for application and voting during Board elections and for a more efficient working of Committees. The appointment of vice-chairs per IDA was formalised.

In February, the Secretariat launched a membership survey to gather the members' and supporters' feedback on NEW-IG's work during 2009. The results were presented at the GA of 14th April 2010. Generally, members were pleased with NEW-IG's work. Some remarks were made on funding levels (too low) and the time to contract.

In November, the members of N.ERGHY and NEW-IG unanimously adopted the changes to their respective bylaws in a joint General Assembly. These changes were set to implement a contribution structure for beneficiaries of the grants to the running cost of the call. This is to ensure the cost of the JU-Programme is fairly shared amongst the beneficiaries of the call in addition to the portion that is already paid by the membership fees of the NEW-IG and N.ERGHY.

2.6 Improving funding levels

A special taskforce was set up to develop a proposal, together with the N.ERGHY, for improving the actual funding rates. A compromise was found and included in broader proposal from the European Commission to the Council to revise the JU Regulation.

2.7 Stakeholder outreach & communications

The NEW-IG supported the Programme Office in the organisation of the FCH JU Stakeholders General Assembly 2010 (SGA), the third of its kind, held in Brussels on 9-10th November. This edition welcomed more than 350 stakeholders and focused on the move from demonstrating fuel cell and hydrogen technologies, to taking them to the market.

Following the success of the 2009 Drive N' Ride in parallel with the SGA, 62 stakeholders were driven or drove H2 cars. This included 11 Members of the European Parliament, 5 journalists and 14 officials of the European Commission, Permanent Representations and Ministries.

The SGA 2010 also saw a re-instatement of an exhibition coordinated with NEW-IG. The exhibition showcased the development in Industry and Research in addition to regions,

The annual FCH JU Brokerage has become an important place for companies in the sector to find partners for consortium. Co-organised by the NEW-IG and N.ERGHY, the 2010 Brokerage event was held in Essen on 17 May, in the evening of the second day of the World Hydrogen Energy Conference (WHEC). The number of participants reached a record of 138, with 57 of them from organisations outside the JU. This was the first time external participants were invited to join in order to expand the pool of possible Call partners.

External communication was enhanced and coordinated with the Joint Communications Taskforce and lead to a higher recognition of FCH in the pathways to decarbonising the European economy by 2050.

One of the highlights of 2010 and a project that is expected to have repercussions for some time to come is the EU Power-train report. In January of 2010, a coalition of 27 private companies, 2 NGOs and the FCH JU, commissioned a well-reputed international business consultant to develop a fact base along the hydrogen and electric value chain. Many of these industrial partners are members of the NEW-IG.

This unparalleled initiative provided up to date well-to-wheel data of fuel cell vehicles in relation to other (alternative) power trains. It maps out the efficiency, performance and deployment cost of the fuel cell vehicle in relation to the other main alternatives, including battery electric cars and traditional internal combustion engines. It clearly concludes that FCEV is the best option for family-cars and the longer range. Since these car-segments account for 50% of all cars and 75% of CO₂ emissions in Europe, introduction of FCEV would have a major impact. The full analyses "A Portfolio of power-trains for Europe: a fact-bases analysis" can be downloaded at www.zeroemissionvehicles.eu.

Nonetheless, a significant amount of work remains to be done to expand this fact-based positioning, coordinate messaging and raise wider awareness.

2.8 Finance

In 2010, the financial basis for the NEW-IG was stabilised. The VAT-exemption status was achieved and repayments were collected. More vigorous follow-up of outstanding membership-fees reduced arrears significantly to €26,650. Cash-flow management resulting from a mismatch between the timing of the payment obligation to the Running Cost of the Programme Office and the collection of project-contributions lead to the call for a request for advanced payment of membership-fees for 2011. This was enacted and the year was closed with a revenue of €324,180.

**FCEVs are the lowest-carbon solution
for medium/larger cars and longer trips.**

(A Portfolio of power-trains for Europe: a fact-bases analysis)



3 THE FCH JOINT UNDERTAKING

The European Strategic Energy Technology (SET) Plan has identified fuel cells and hydrogen among the technologies needed for Europe to achieve the targets for 2020 – 20% reduction in greenhouse gas emissions; 20% share of renewable energy sources in the energy mix; and 20% reduction in primary energy use – as well as to achieve the long-term decarbonisation objectives by 2050.

With this objective in mind, the European Commission (EC) proposed a long-term public-private partnership in the form of a Joint Technology Initiative (JTI) on Fuel Cells and Hydrogen Technology. In practical terms, this JTI was set up as a Joint Undertaking (JU). Together with the EC, the other partners in the JU are the NEW-IG – the New Energy World Industry Grouping, and N.ERGHY, the Research Grouping.



“ The costs for a hydrogen infrastructure are relatively low compared to the total cost of ownership of the cars (approximately 5% over the lifetime of the FCEV). ”

(A Portfolio of power-trains for Europe: a fact-based analysis)

4 THE FCH JU'S COMMITMENTS

The aim of the FCH JU is to accelerate the development and deployment of fuel cells and hydrogen (FCH) technologies in Europe, by executing an integrated programme of technological development and demonstration (RTD) activities. It is jointly carried out with the involvement and cooperation of stakeholders from industry (including SMEs), research centres, universities, EU Member States and regions.

In particular, the commitments of the FCH JU are to:

- Place Europe at the forefront of FCH technologies worldwide and enable the market breakthrough of FCH technologies, thereby allowing market forces to drive the substantial potential public benefits.
- Support R&D in the EU Member States and Associated Countries participating in the 7th Framework Programme (FP7) to overcome the high-market entry barriers, develop market applications and facilitate additional industrial efforts towards a rapid development of FCH technologies.
- Support the implementation of the RTD priorities of the Multi-Annual Implementation Plan by awarding grants following competitive calls for proposals.
- Evaluate the energy, environmental, economic and social sustainability of technological solutions by means of horizontal activities at programme and project level.
- Monitor progress in relation to competing and complementary technologies to assess sustainability and economic competitiveness.
- Encourage increased public and private RTD investment in FCH technologies in the EU Member States and Associated countries.
- Promote public awareness and understanding of these technologies and the contributions they can make to address energy, environment and transport policies.
- Ensure the coordination and efficient management of funds. This will be guided by the principles of transparency and openness, competitiveness and excellence, inclusiveness and mutual cooperation among stakeholders in order to achieve the best possible benefit for Europe.



5 REVIEW NEW-IG ACTIVITIES 2010

2010 Objectives	Actions	Status
Programme Office / Calls		
Improve appeal of 2010 Call and anticipate opening date	The Brokerage events, organised together with the RG had a record number of attendees; to ensure involvement from organisations outside the JU, the IG was present at the WHEC 201 with a stand; once the Call was launched PO experts shared tips with IG members.	✓
Anticipate Call 2011 Committee kick-off discussions	Meetings within the Working Groups begun already at the end of 2010, in coordination with the RG.	✓
Work with JU Governing Board to change the funding rules - current funding-rules stretch funding capacity (matching, issues for SMEs); strive for improved framework for Calls 2010 and 2011	The Governing Board took a principle decision to put forward to the EC a proposal to amend the statutes to enable the contribution from research organisations to also count as matching. It was also agreed to investigate if national funding can be counted as matching.	✓
Coordinated preparation of mid-term review 2011 with JU-PO	Preparatory activities started January 2011.	n/a
Autonomy JU-PO in March 2010	Full autonomy was complete in November 2010.	✓
Finance		
Finalise agreement with VAT office	Done.	✓
Communications		
Develop strategic external communication plan (incl. "FCH week")	The NEW-IG, PO, EHA and HyRaMP established a Joint Communications Taskforce to coordinate activities in that area. The development of the Communications Plan is planned for early 2011.	✓
Re-vamp website, making it more appealing to visitors and more user-friendly	In view of the launch of the new JU website in early 2011, the Board decided to integrate all web channels into one (JU, IG, RG), instead of investing in an IG-dedicated website.	n/a
Promote successful results of demonstration-projects	Ongoing JU projects were showcased via the Stakeholders General Assembly as well as in the parallel exhibition (stands and posters).	✓
Ensure FCH part of long-term EU planning (SET-plan, EU Transport strategy, EU Energy Strategy, TEN-T, funding mechanisms)	IG mapped ongoing and future political initiatives and allocated each to the monitoring of each Board member. Through the Joint Communications Taskforce, several position of role of FCHV were released to the EC, European Parliament, Member States and European Council. The IG also maintained an ongoing engagement with EHA, FCE and HyRaMP.	✓
Build relations both EU political level, other stakeholders (wind, solar, power, car, marine, etc.)	Some direct meetings were organised across the EU Institutions and a position on clean vehicles was communicated. Further, the Secretariat and Board members attended external events where they had the chance to develop contacts in key areas, such as the European Technology Platform Day.	✓
Start thinking about period beyond JU FCH (2014+)	Discussions were officially initiated at NEW-IG Board level, with the involvement of the PO.	✓

Improve SGA based on feedback from previous years

According to indications from the Governing Board, the SGA 2010 was held in a location outside the European institutions. A larger amount of time was allocated to networking, the number of international speakers was increased and the Exhibition was re-instated.

**Membership****Increase number of members and supporters**

Membership declined in 2010. The IG had 59 members at the end of 2009 and finished 2010 with 56. Main reasons were the financial crisis and a shift in certain company's short-term strategy away from FCH. Number of supporters increased from 2 in Q1 2010 to 6 at Q4 2010.

**Others****Develop application oriented commercialisation roadmaps to manage the transition from the current Research, Development & Demonstration phase to the first commercial start.**

Led by a coalition of 30 organisations and with the support of the NEW-IG, the study "A portfolio of power-trains for Europe: a fact-based analysis" was officially launched in Brussels in October 2010. It is the first step in a roadmap for FCHV in Europe. The initial steps towards similar projects for bus, forklifts and stationary applications were initiated also in 2010.



6 AMBITION & TARGETS 2011

Programme Office – Calls

- Reduce time from Call to Payment whilst continuing to ensure quality of process
- Contribute to recruitment of high-quality Call evaluators
- Work with PO to ensure successful revision of MAIP
- Develop attractive AIP 2012
- Complete Mid-term review
- Complete revision JU Regulation, leading to improved funding rates

Finance

- Ensure sound implementation of contribution scheme from beneficiaries of FCH JU Calls to the running cost of the Programme
- Improve (internal) financial management reports

Communications

- Enhance political outreach and coordinate political engagement with Joint Communications Taskforce and JU
- Ensure FCH becomes part of long-term EU strategies in the fields of research, innovation, transport and energy
- Develop and implement Strategic External Communications Plan
- Continue to promote successful results of demonstration projects
- Work with JU-PO to develop attractive and relevant promotional materials (e.g. brochures)
- Revise NEW-IG website
- Update NEW-IG-related content as part of JU website integration

Membership

- Work towards inclusion of consortium partners in the NEW-IG membership
- Improve timely payment of membership fees
- Re-introduce internal quarterly newsletters
- Organise Brokerage event for 2011 Call
- Membership survey

The cost of hydrogen reduces by 70% by 2025.

(A Portfolio of power-trains for Europe: a fact-bases analysis)

Strategy & Vision

- Develop a vision for the future of the JU
- Develop Roadmap for market-preparation/implementation FCEVs up to 2020 and innovative financing schemes to support roll out.
- Stationary Scoping Study and subsequent advocacy
- Develop alternative funding scenarios for sector developments (e.g. Forklifts, Buses, Early Markets)
- Re-develop a vision for long-term needed R&D Support for the FCH sector, in the light of upcoming FP8 Program
- Develop vision for market breakthrough of fuel cells
- Develop hydrogen vision as part of the EU energy landscape
- Evaluate impact of such an energy landscape on EU competitiveness, job and wealth creation within EU Member States

Others

- Facilitate active involvement of members in developing a vision on the role of FCH towards decarbonisation and energy efficiency
- Continue to develop application-oriented commercialisation roadmaps to manage the transition from the current Research, Development and Demonstration phase to the first commercial start.
- Safeguard sufficient funding for the running of the JU beyond 2013
- Ensure smooth change of leadership with three to four new Board-members arriving in March 2011
- Contract Secretariat services after 2011

7 CALLS & FUNDS

The 2009 Call went through the evaluation and negotiation stages, while the 2010 Call opened officially on 18th June 2010.

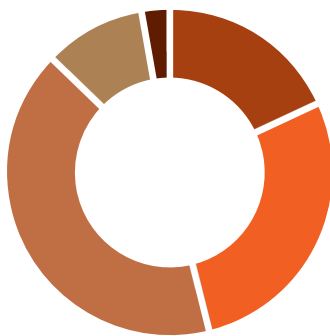
7.1 2009 Call

The 2009 Call was open from 2nd July to 15th October 2009 and the evaluation and negotiation phases were completed in October 2010. Although a budget of €71.3M (increased by the EFTA contributions amount to €72,970,240) was available, €72.5M were awarded with the following distribution:

- Transportation & Refuelling Infrastructure: €30.5M
- Hydrogen Production & Distribution: €3.7M
- Stationary Power Generation & CHP: €23.9M
- Early Markets: €12.0M
- Cross-cutting Issues: €2.4M

50 proposals were received, involving a total of 395 organisations – an increase of 62% from the 243 in the previous year. Of the 395 organisations, 46% were from the Industry, 18% were SMEs, 51% from Research and Higher Education institutions and 3% others (consultancy companies, international organisations etc.). After the evaluation process, the 31 proposals which passed all thresholds were requesting €94.56M in funds.

Participation in project proposals by participant type



- SME **18%**
- Industry **28%**
- Research **41%**
- Higher Education **10%**
- Others **3%**

By project participant number
(Total participants: 395)

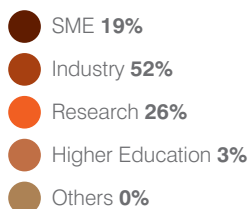
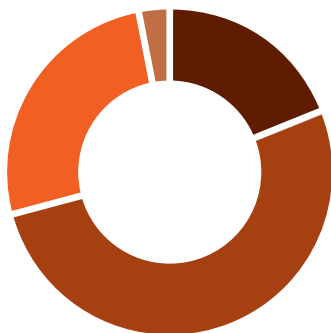
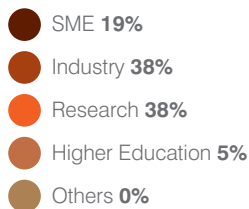
Call for Proposals 2009 (50 proposals received):

The 50 proposals were evaluated by a panel of 32 experts (including one chair and one observer of the process) during the period of 3rd-20th November 2010. At the end of evaluations, FCH JU Programme Office performed budget assessment and matching calculation and 26 proposals were selected to move on to the negotiation phase, requesting a total of €71.8M. During negotiations, some budget was saved from big proposals. Therefore, 2 more proposals were invited to start negotiations.

Negotiations closed officially in November - December 2010, awarding €72.5M to 28 proposals which together comprised 242 organisations. Of the grant's amount, 57% were awarded to the Industry (including SMEs), even though they were 71% of participants.

The 2009 Call was the second one released within the FCH JU and a notable improvement from the first, which saw almost half of the proposal not reaching the threshold that allowed them to even be evaluated. Only 19 proposals had the same problem in the 2009 Call. Also, in the previous Call, five topics were not covered. In the 2009 Call, there were 10 topics uncovered with successful proposals.

Projects granted funding by participant type



Call for Proposals 2009:

The 28 projects that received funding were:

Transportation & Refuelling Infrastructure

- Hydrogen fuel quality requirements for transportation and other energy applications
- Clean Hydrogen in European Cities
- PEM with Innovative low cost Core for Automotive application
- Enhanced Design Requirements and Testing Procedures for Composite Cylinders intended for the Safe Storage of Hydrogen

Hydrogen Production & Distribution

- Fuel Cell Coupled Solid State Hydrogen Storage Tank
- Advanced Electrolyser for Hydrogen Production with Renewable Energy Sources

Stationary Power Generation & CHP

- Robust Advanced Materials for metal Supported SOFC
- Predictive Modelling for Innovative Unit Management and Accelerated Testing Procedures of PEFC
- MembrAnEs for STationary application with RObust mechanical properties
- Degradation signatures identification for stack operation diagnostics
- Low Temperature Solid Oxide Fuel Cells for micro-CHP applications
- ASsessment of SOFC CHP systems build on the TEchnology of htceRamIX 3
- Cathode Subsystem Development and Optimisation
- DC/DC COnverter-based Diagnostics for PEM systems
- Solid Oxide Fuel Cells – Integrating Degradation Effects into Lifetime Prediction Models
- STAYERS Stationary PEM fuel cells with lifetimes beyond five years
- Sulphur, Carbon, and re-Oxidation Tolerant Anodes and Anode Supports for Solid Oxide Fuel Cells
- Ammonia based, fuel cell power for off-grid cell phone towers
- Evaluating the Performance of Fuel Cells in European Energy Supply Grids

Early Markets

- European demonstration of hydrogen powered fuel cell forklifts
- Sustainable Hydrogen Evaluation in Logistics
- Fuel cell field test demonstration of economic and environmental viability for portable generators, backup and UPS power system applications
- Mobility with Hydrogen for Postal Delivery

Cross-cutting Issues

- HyGuide
- Identification, Preparation and Dissemination of Hydrogen Safety Facts to Regulators and Public Safety Officials
- Development of educational programmes and training initiatives related to hydrogen technologies and fuel cells in Europe.
- Building Training Programmes for Young Professionals in the Hydrogen and Fuel Cell Field
- Development of Guidance Manual for LCA application to Fuel cells and Hydrogen

7.2 2010 Call

The 2010 Call, officially opened on 18th June 2010. In preparation for this and to support members in submitting successful proposals, the NEW-IG invited experts from the JU-PO to attend the General Assembly of 6th September 2010. The PO gave members an overview of the results of past Calls and shared tips and advice on to how to overcome the most common barriers to getting funds.

Also, on 17th May 2010, the NEW-IG together with N.ERGHY organised a Brokerage Event in Essen (see "Stakeholder Outreach") to facilitate the formation of consortia across the different Call topics. The JU-PO was once again invited to give a presentation to attendees as well as support the 4 different breakout sessions that included more detailed discussions.

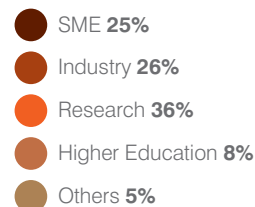
Using the regular NEW-IG Weekly Monitoring, the Secretariat further distributed ad-hoc requests from non-member companies that approached the Industry Grouping looking for partners in specific areas.

By end 2010 the JU-PO made some preliminary data of this third Call available. A total of 71 consortia submitted proposals:

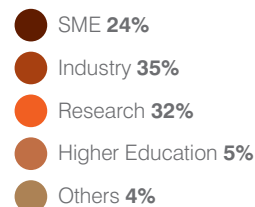
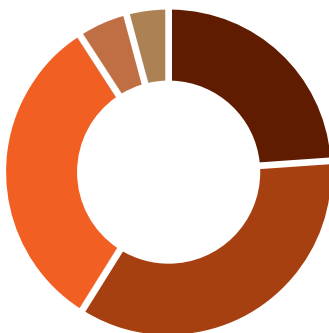
Area	Budget available (M€)	Received Proposals (#)	Requested Grant (M€)
Transportation & Refuelling Infrastructure	31.6	14*	75.07
Hydrogen Production & Distribution	11.0	13	26.24
Stationary Power Generation & CHP	33.0	29	94.29
Early Markets	11.5	12	32.12
Cross cutting Issues	2.0	3*	2.78
TOTAL	89.1	71 (69 evaluated)	230.5*

* 2 proposals ineligible not considered in the requested budget

In 2010, the Industry composed 51% for the 559 organisations that responded to the Call and applied for 59% of the total €230.6M grant requested.

**Call for Proposals 2010
(69 proposals evaluated):**

By project participant number
breakdown (Total participants: 559)



By budget
(Total requested grant: €230.6M)

7.3 AIP 2011 - 2011 Call

Preparations for the 2011 Call - the call with the highest amount of funds in the MAIP 2008-2013 - were already initiated in October 2010, through a workshop at the Stakeholder General Assembly. Industry Working Groups aligned with their Research Grouping counterparts to align or formulate recommendations for the AIP 2011. The process was well coordinated by the JU-PO and the respective working groups of NEW-IG and N.ERGHY. The Call is expected to open at the beginning of May 2011, pushing forward the date by several months compared with previous years.

7.4 Improving funding levels

Since the 2008 Call – the first in the JU – it was evident that funding levels were significantly lower than expected and not aligned with those of FP7. Members of the FCH JU recognise the need to investigate the reasons why such low levels of real funding rates were produced and find a strategy to improve them.

Accordingly, a Working Group dedicated to the funding issue, consisting of representatives of NEW IG (Mikael Sloth, Philippe Mulard), N.ERGHY (Frank de Bruijn) and the Programme Office was established. Following a number of meetings held since the availability of results for the 2008 Call, the Group produced a report at its meeting in November 2009. The report stated that it was indeed impossible to improve the funding issue without a change in the Regulation. As a follow up of that conclusion, in 2010 the Group produced a document listing four different options for an amendment to the Council Regulation.

These two reports developed by the Working Group have been taken into consideration when the Commission prepared a note addressed to the JU's Governing Board with an overview of options and recommended next steps. Furthermore, the Commission organised a telephone conference (20th May) and a meeting (25th May) with representatives of the Industry Grouping, the Research Grouping and the Programme Office to collect feedback on a draft version of the note.

The options presented a scale of different alternatives from the one putting emphasis on co-funding of the partnerships' activities to highest degree of competitiveness as compared to other programmes.

NEW-IG and N.ERGHY representatives initially indicated that, their preferred option is the option that maximizes funding for both the Industry and Research. However, Governing Board consensus could only be reached to try to realize the option where in kind contributions of Research would also count as matching and were Member State and regional funding were not subtracted from EU funding.

The European Commission should make a decision on its preferred option, if any, and prepare a timeframe for the amendment to the Council Regulation in 2011.

“ **By 2050, all electric vehicles are cost-competitive with ICEs, FCEVs are the lowest-cost solution for larger cars.** ”

(A Portfolio of power-trains for Europe: a fact-bases analysis)

8 MEMBERSHIP AND CONTRIBUTION SCHEME DEVELOPMENTS

In November 2010, members of N.ERGHY and NEW-IG, in a joint General Assembly, unanimously adopted changes to their respective bylaws to implement a contribution structure by which grant beneficiaries make payment towards the running cost of the Call as from the 2009 Call. The purpose of this contribution mechanism is to share the cost of the JU Programme fairly amongst the beneficiaries of the Call by asking for a supplementary contribution alongside that already paid from NEW-IG and N.ERGHY membership fees.

These contributions are a fundamental and essential financial resource, enabling the existence of the JU FCH.

The Secretariat also implemented in February 2010 a membership survey to gather the members' and supporters' feedback on the IG's work during 2009.

8.1 Implementation of the contribution proposal

The Council Regulation establishing the FCH JU points out the aim that the operational costs of the FCH JU should be funded by the Community, industry and other public and private legal entities participating in the activities. The running costs of the FCH JU Programme are currently shared between the public-private partners in the JU: NEW-IG contributes 6/12, N.ERGHY 1/12 and the European Commission 5/12 of the total amount.

These amounts cannot be funded by membership fees from NEW-IG and N.ERGHY alone. With a fluctuating membership between 55 and 65 members in recent years, including 45% innovative small and medium sized enterprises (SMEs), the Industry cannot accommodate 'free-riding' beneficiaries (beneficiaries receiving grants without paying contributions). Formerly, members of the NEW-IG and N.ERGHY had to contribute to the running cost of the programme regardless of the fact that they may never be the beneficiary of a grant. It was therefore agreed between the NEW-IG and N.ERGHY to introduce a contribution scheme in order to share the cost of the programme amongst all recipients of the JU grants, who then contribute to the cost of the grant scheme they benefit from.

The contribution is currently set at an amount equal to 4% of the grant attributed. It is not an eligible cost and the contribution is transferred to a protected account, managed by the NEW-IG Secretariat on behalf of N.ERGHY and NEW-IG together and dedicated solely to payments made in relation to contributions towards the running cost of the JU FCH Programme Office. Quarterly management reports are provided to the Boards of both organisations and once a year the results and financial report is presented to the General Assemblies of both organisations.

This contribution is applicable as from the 2009 Call to all participants in a winning consortium, treating members and non-members equally.

In November 2010, in a joint General Assembly, the members of NEW-IG and N.ERGHY voted unanimously in favour of the implementation of this scheme, creating with such consent a sound and durable financing structure for the running costs of the JU FCH.

8.2 Membership survey 2010

A membership survey was launched in March 2010 and the results were shared with members at the General Assembly of 13th April 2010. Apart from questions on the performance of the NEW-IG Secretariat and Board, the members were also asked about their views regarding the JU and the Calls, although the large majority of these projects fall outside of NEW-IG's control. The results were also shared with the JU-PO.

Regarding the JU in general, 50% of respondents agreed that JU led "the FCH industry in working together" but 40% felt that the JU could have done a better job at "communicating the benefits of FCH in Europe". There was a clear acknowledgment of the importance of the Commercialisation Plans.

In relation to the Secretariat in particular, the highest appreciation from respondents was for the work done in improving the financial control and reporting and the lowest for "improving JU's funding structure".

The key issues for the future were listed as the improvement of funding, clear and consistent political messages and other external communications, which the Board incorporated in the targets for 2011.



**By 2020, the
cost of a fuel cell
system
falls by 90%.**

(A Portfolio of power-trains for Europe:
a fact-bases analysis)



9 STAKEHOLDER OUTREACH

9.1 Events

9.1.1 FCH JU's SGA 2010

The NEW-IG supported the Programme Office in the organisation of the FCH JU Stakeholders General Assembly 2010 (SGA), the third of its kind, held in Brussels on 9th-10th November 2010.

This edition focused on the move from demonstrating fuel cell and hydrogen technologies to taking them to the market. In the plenary sessions, prominent speakers from the industry, public sector and the research community offered insights into strategies and instruments for commercialisation of fuel cell and hydrogen applications around Europe and overseas (Japan, Korea and USA).

Project presentations went into detail on the latest technical developments in the field, while dedicated sessions on the Joint Undertaking's progress and future the opportunity gave attendants the opportunity to gain an in-depth view of the programme and to participate in shaping its future development and priorities.

Over 350 stakeholders gathered in Brussels, establishing the SGA as a forum for the industry, as well as academic and political stakeholders with an interest in the FCH sector.

9.1.2 Drive N' Ride 2010

Following the success of the 2009 Drive N' Ride, once again held in parallel with the SGA, several H2 cars took interested stakeholders for a ride around Brussels.

A total of six cars came to Brussels for this event: two from Daimler, two from Opel, one from Honda and one from Toyota. The models available were Honda FCX Clarity, Mercedes-Benz B-Class F-CELL, Opel HydroGen 4 and Toyota Prius Plug-in Hybrid.

A total of 62 stakeholders were driven or drove the cars, including 11 Members of the European Parliament, five journalists and 14 officials of the European Commission, Permanent Representations and Ministries.

Between rides, the cars were parked in areas of great visibility: either close to the SGA venue or in Place du Luxembourg, one of the landmarks of Brussels, right in front of the European Parliament.

9.1.3 Exhibition 2010

During the first SGA, in 2008 the NEW-IG organised an Exhibition which showcased the development in Industry and Research as well as regions. The SGA 2010 saw a re-instatement of the exhibition, once again coordinated by the NEW-IG.

On the ground floor of the SGA venue, 9 organisations set up stands and 12 others exhibited posters about their projects; the large majority of them funded by FCH JU grants. Exhibitors had the opportunity to network with attendees and explore business connections.

9.1.4 Brokerage Event and presence at the WHEC

The annual FCH JU Brokerage has become an important place for companies in the sector to find partners for consortium. The event was jointly organised by NEW-IG and N.ERGHY in Essen, Germany, in the evening of the second day of the World Hydrogen Energy Conference (WHEC) on 17 May. The event was followed by a networking dinner.



The number of participants was a record 138 participants, 57 of those from organisations outside the JU, which were invited for the first time to join in order to expand the pool of possible Call partners.

The Programme Office was invited to present the topics of the upcoming Call as well as to share best-practice advice. The participants then divided into four breakout sessions for each of the four application areas: Transport & Refuelling Infrastructure, Hydrogen Production & Distribution, Stationary Power Generation & Combined Heat & Power and Early Markets.

The WHEC is generally considered one of the most important FCH-related events in the world. Many of the NEW-IG's current and potential members had a stand at the Fair or participated in the Conference. The NEW-IG also participated with a stand where members dropped by and partners companies as well as general WHEC attendees were welcomed.

9.1.5 NEW-IG General Assemblies

During 2010 the NEW-IG held four General Assemblies:

27th January 2010 (Extraordinary)

This meeting was held in Brussels and 32 members were represented (in person, or via webinar and proxies). Among other decisions, participants agreed to put the new version NEW-IG bylaws to vote at the next GA as well as the decision to regularly revisit the Commercialisation Plans during upcoming GAs and SGAs. The Joint Communications Taskforce was also presented to the members.

13th April 2010

The second GA of the year was also held in Brussels, with 31 members represented. The main objective of this GA was to decide on the proposal for new bylaws which affected the existing format of the Committee Structure and Board elections (including a continuity rule).

The GA unanimously adopted the system "election coupled with pre-defined roles" as well as a new committee structure with only four groups: Transport & Refuelling Infrastructure, Hydrogen Production & Distribution, Stationary Power Generation and CHP and Early Markets. Newly developed internal rules following Art. 18 and 22 of the bylaws were also adopted. The objective is to lay down rules of procedure for Board candidates and elections and for the proper functioning of the Committees.

The GA also approved the NEW-IG finances of 2009 and the 2010 budget.

6th September 2010 (Extraordinary)

Both in person and via webinar or proxy, 32 members were represented at this Extraordinary GA. The main reason for the convocation was the need to elect two new Board members. H2Logic's term had come to an end (Mikael Sloth) and NTDA (Herbert Wancura) resigned. At the end of the GA two new Board members were elected: Pierre-Etienne Franc representing Air Liquide and Henry Winand from Intelligent Energy.

The GA also agreed to accept two new membership applications: ITM Power (UK) and AFC Energy (UK).

Another important decision was the agreement that, to ensure that there are no loop-holes in the application of the contribution scheme, the bylaws were to be slightly changed, at the request of the NEW-IG's lawyer. This change was agreed to be prepared for voting on the joint GA with N.ERGHY.



10th November 2010

For the first time a joint General Assembly was organised for the members of N.ERGHY and NEW-IG to discuss matters, like the contribution scheme, that regard both partners in the JU-FCH. The NEW-IG GA was therefore divided into a private part only for NEW-IG members and a joint part with N.ERGHY to discuss and decide on the proposed new bylaws.

Organised on the second day of the SGA, the GA only accepted members who were present in person or via a proxy. A record number of 45 members, 1 supporter and 10 observers, were represented. In the first part, the GA approved the applications of a new member - Solid Cell Limited (IR) and a supporter - OMB Saleri (IT) and discussed operational matters.

At the joint GA, 29 IG members were represented and after a thorough explanation of the scheme and its implications by the Chair of the NEW-IG and N.ERGHY Board, both the Industry and Research Grouping unanimously accepted the proposed changes to their bylaws. The contribution scheme was also included and accepted in the proposed changes.

9.2 Communications

The members asked the NEW-IG Board to step up the external communication activity, in particular towards the EU Institutions in order to secure FCH Technology as a part of the EU long term political priorities. The Secretariat together with the Board implemented several activities in 2010, which can be seen as the beginning of a long-term strategy and increased engagement.

9.2.1 Joint Communications Taskforce

In view of recent EU policy developments, the Joint Taskforce for Communications on hydrogen and fuel cells was established during 2010 as collaboration between the JU Programme Office, NEW-IG, EHA and HyRaMP. The objective will be to coordinate and align communication on selected dossiers related to FCH to key decision makers in Europe. A coordinated and joint approach should strengthen the sector's voice. Upon arrival of the communication and stakeholder manager of the FCH JU in the second part of 2010, the JU also became part of this Joint Communications Taskforce.

The Taskforce identified several EU dossiers relevant to hydrogen and fuel cell industry developments that require a comprehensive, strategic response. A concrete perspective of the contribution of hydrogen and fuel cell technologies to the objectives of the specific dossiers should ensure that FCH technology is part of the EU energy and transport strategy and secure support in various (future) EU funding programmes.

9.2.2 Written contributions

In the first half of 2010, the Spanish Presidency of the Council of the EU strongly pushed for introducing a framework for market deployment of battery electric vehicles. This caused some concern, since fuel cell vehicles, until then part of the electric car family, were not at all part of the Spanish agenda. Therefore, ahead of the Competitiveness Council of March 2010, an open letter was sent to the Permanent Representations in Brussels. This letter stressed the need to ensure that fuel cell vehicles remain included in the debate on future transport. The Joint Taskforce asked for actions and proposals from the Council and the European Commission to support a coordinated development of the full range of electric transport in Europe. This includes both fuel cell and battery powered cars. This kick started a more coordinated and active outreach on the use of fuel cell and hydrogen in transport applications.

On 11th March 2010, the Commission organised a public hearing on the European strategy on clean and energy efficient vehicles, in which the NEW-IG Secretariat participated. The NEW-IG further issued a written contribution to raise the awareness of the role of fuel cell vehicles in a future decarbonised





transport system. The result was positive. The strategy explicitly mentioned fuel cell electric vehicles as one of the alternatives to be looked at within an appropriate and technology neutral policy framework for clean and energy efficient vehicles. The joint taskforce followed up with a letter to the European Commission, welcoming the strategy.

In March 2010, the NEW-IG contributed to an event on electro-mobility organised by HyRamp in the European Sustainable Energy Week.

Various direct meetings were organised with officials from the European Commission and several Permanent Representations to follow up and raise awareness about the role of fuel cell vehicles and FCH technology for reducing CO₂ emissions.

NEW-IG managed to become part of the expert-group on alternative fuels, and in coordination with the JU-PO contributed to the process from the first meeting in April 2010 until the release final of the final report. The NEW-IG actively contributed to the process and the reports, which resulted in a quite balanced and favorable positioning of hydrogen as a future alternative fuel. The EU power-train report provided a very good source of information and was quoted several times in the final report on alternative fuels (released on 25th January 2011).

9.2.3 Power-train study

One of the highlights of 2010, and a project which is expect to have repercussions for some time to come, is the EU Power-train report. In January of 2010, a coalition of 27 private companies, two NGOs and the FCH JU, commissioned McKinsey and Partners to develop a fact base along the hydrogen and electric value chain. Many of these industrial partners are members of the NEW-IG.

This unparalleled initiative provided up to date well-to-wheel data of fuel cell vehicles in relation to other (alternative) power trains. It maps out the efficiency, performance and deployment cost of the fuel cell vehicle in relation to the other main alternatives, including battery electric cars and traditional internal combustion engines. It clearly concludes that FCEV is the best option for family-cars and the longer range. Since these car-segments account for 50% of all cars and 75% of CO₂ emissions in Europe, introduction of FCEV would have a major impact. The full analyses "A Portfolio of power-trains for Europe: a fact-bases analysis" can be downloaded at www.zeroemissionvehicles.eu.

Ahead of the publication of the report "A Portfolio of power-trains for Europe: a fact-bases analysis - The Role of Battery Electric vehicles, Plug-in Hybrids and Fuel Cell Electric Vehicles", the NEW-IG supported the group of companies involved in this study. The organisation held preliminary round table meetings (by invitation-only) for the European Commission, European Parliament, the NGO-community and Industry. During these sessions the preliminary outcomes of the analysis were discussed.

On 8th November, ahead of the SGA, the Report was officially launched in Brussels where key results were presented and participants had the opportunity to discuss the implications for EU climate and transport policy. Speakers included representatives from the European Commission, European Parliament, industry and NGOs. The event welcomed about 200 participants who also had the opportunity to test-drive a FCEV.

MEP Seán Kelly after test drive
of Mercedes-Benz F-Cell,
Brussels, November 2010



10 THE BOARD AND SECRETARIAT

10.1 Changes in the Board

During the year 2010 two Board-members changed. As mentioned previously (see “General Assemblies”) at the Extraordinary General Assembly of 6th September, two new members were elected to the NEW-IG Board. This followed the end of term of H2Logic, represented by Mikael Sloth and the resignation of NTDA, represented by Herbert Wancura.

The two new Board members are:

- Intelligent Energy (UK) represented by Henri Winand, Chief Executive. Henri took over NTDA as leader of the Early markets Committee.
- Air Liquide (France) represented by Pierre Etienne Franc, Head of the Technologies of the Future and in the NEW-IG Board general Board-member.

10.2 Recruitment of staff for the JU PO

One of the main activities in 2010 was the recruitment of staff of the Programme Office. A recruitment team was set up for each role, consisting of representatives of the EC and a Board-member of NEW-IG and the Research Grouping responsible for interviewing and selection of candidates. 18 staff members and a new leadership team were recruited out of more than 1000 applicants.

10.3 Ad-hoc taskforces

An ad hoc taskforce was created for the preparation of the bylaws change. The work of this taskforce lead by Lucio Gallo, the Secretariat and a legal advisor resulted in two different Board-election systems to choose from. The systems differed in two major points: 1) coupling or de-coupling election of Board-members to certain roles in the Board and 2) introduction of an exemption to the rule a maximum number of terms.

Another taskforce was created for developing ways to improve the funding levels. This taskforce was lead by Michael Sloth and resulted in recommendations to the Governing Board, on which basis a proposal was made by the European Commission to change the Regulation. More details can be found in section 7.4 of this annual report.

“
FCEV can
become
commercially
available as
from 2025.

(A Portfolio of power-trains for
Europe: a fact-bases analysis)

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11 COMMITTEE REPORTS - MILESTONES AND ACHIEVEMENTS

The NEW-IG is divided into four working groups or Committees. They were created to support specific industry needs within the Grouping, including providing specialised input into the development of the yearly Annual Implementation Plans.

11.1 Stationary and Fuel Cells for Power and Heat Generation

Leader(s): Lucio Gallo (Ansaldo Fuel Cells)

Members: Acciona Energia, Adelan Ltd, AFC Energy, Alstom, Ansaldo Fuel Cells S.p.a., AVL, Dantherm Power, Diverse Energy Ltd, Enel Produzione - AT Ricerca, Electro Power Systems, EWE ENERGIE AG, Hygear b.v., Iberdrola, INEA, Infraser, Intelligent Energy, IRD Fuel Cells A/S, Johnson Matthey, MTU Onsite Energy GmbH Fuel Cell Systems, NedStack, Saint Gobain, SAPIO Produzione Idrogeno Ossigeno Srl, Shell, SOFCpower, Solid Cell, Topsoe Fuel Cell A/S, Vattenfall Europe AG, Wärtsilä

Meetings: 8th March (call), 17th May (Essen), 10th June (call), 15th September (call), 19th October (call), 3rd November (Brussels), 10th November (Brussels), 11th November (Brussels), 6th December (call), 10th December (call)

Highlights:

- Call 2009: 13 proposals awarded with funding of €24M from FCH JU
- Call 2010: 29 proposals submitted, 17 proposals preliminary shortlisted after evaluation
- Coalition building for Scoping Study for Stationary Commercialization Roadmap – to be launched at the beginning of 2011

11.2 Hydrogen Production and Distribution

Leader(s): Gijs van Breda Vriesman (Shell) & Philippe Mulard (Total) & Frederic Barth (Air Liquide)

Members: Acciona Energia, Air Liquide, Air Products, Environment Park, GDF Suez, Hydrogenics, Hygear, Hydrogen Technologies (Statoil), Hynergreen, Linde, Sapio, Shell, Total

Meetings: Committee worked via e-mail without telecom or face-to-face meetings due to high degree of consensus around Annual and Multi annual implementation plan.

Highlights:

- Topic list for AIP 2010 agreed among hydrogen committee members
- Topic list for AIP 2010 agreed with research grouping
- First draft of topic descriptions for AIP 2010 written and agreed with RG
- Several updates of topics descriptions for AIP 2010 (considering comments from SC, SRG, JRC and EC) done
- Last version of topic descriptions for AIP 2010 written and submitted to European Commission
- Draft target list for MAIP update agreed

11.3 Transportation and Refuelling Infrastructure

Leader(s): Jörg Wind (Daimler) & Mikael Sloth (H2Logic)

Members: Adam Opel GmbH, Air Liquide, Ansaldo Fuel Cells S.p.a., AVL, The CCS Global Group Ltd., Centro Ricerche Fiat SCpa, Daimler AG, H2 Logic, Infracore, Intelligent Energy, Nedstack, Nucellsys, RiverSimple LLP, SNECMA, Umicore AG & Co. KG, Volkswagen, Volvo Technology, Wärtsila, ITM Power (Trading) Limited, Johnson Matthey, OMB SALERI SPA

Meetings: 2nd February (call), 15th March (Brussels), 9th September (Brussels), 3rd November (Brussels), 6th December (call) and in addition briefing cooperation based mainly on exchange of documents via email

Highlights:

- Topic list for AIP 2010 agreed among transportation committee members
- Topic list for AIP 2010 agreed with research grouping
- First draft of topic descriptions for AIP 2010 written and agreed with RG
- Several updates of topics descriptions for AIP 2010 (considering comments from SC, SRG, JRC and EC) done
- Last version of topic descriptions for AIP 2010 written and submitted to European Commission
- Draft target list for MAIP update agreed
- Topic list for AIP 2011 agreed among transportation committee members
- Topic list for AIP 2011 agreed with research grouping
- First draft of topic descriptions for AIP 2011 written and agreed with RG

11.4 Early Markets

Leader(s): Herbert Wancura was the leader until July 2010 when he resigned. Mikael Sloth was then the Interim leader until the election of Henri Winand on 6th September 2010.

Members: Adelan, AlJU, Air Liquide, CCS Global Group, CPI, CUTEC Institut, Dantherm, Electro Power Systems, FORTH ICE-HT, H2 Logic, IMM-Mainz, INASMET, Intelligent Energy, IREC, ITAE, ITM Power, Labor, LBST, Linde, Johnson Matthey, Nedstack, SINTEF, SOFC Power, Spinverse, University Poitiers, VTT, ZBT.

Meetings:

3rd November (Brussels), 6th-7th December (call), together with ad hoc calls and exchange of documents and views on MAIP revisions and AIP 2011 Topics in line with the scheduled review deadlines.

Highlights:

- Call 2009: 4 proposals awarded to Early Markets with funding of €12M
- Call 2010: 12 proposals submitted for Early Markets topics
- For 2011, Draft targets for the MAIP update agreed and submitted
- Topic list for AIP 2011 agreed
- Topic descriptions for AIP 2011 written and agreed between IG and RG
- Modifications made and agreed for Topic descriptions for AIP 2011 after first round PO, EC, JRC and SRG comments received
- Draft final modifications agreed between IG and RG and submitted for Topic descriptions for AIP 2011 after comments received

12 FINANCIAL REPORT



Costs for a hydrogen infrastructure are around 5% of the overall cost of FCEVs.

(A Portfolio of power-trains for Europe: a fact-based analysis)



2010 showed a net result of €324,180, including a previous year adjustment of €196,000, which is the provision for the 2009 Programme Office Fee.

Financial highlights in 2010 include:

- Closure of the FCHInstruct Project. Audit by KPMG nearly finalised. Completion expected in 2011
- VAT status adjusted and repayments received

The JU Programme Office reached the status of independence on 15th November 2010. The NEW-IG and N.ERGHY entered into a financing agreement for the payment of the running cost of the Programme with the JU-PO.

As from 2010 the contribution to the running cost of the Programme Office need to be paid in full and ahead of the year it covers. The contribution for 2009 will have to be paid by January 2011 and the contribution for the year 2010 will be paid in three terms in June 2011, 2012 and 2013.

On the operational side of the NEW-IG the following observations can be made: In 2010 the income of the NEW-IG from members was under pressure as the membership declined from 59 members at the end of 2009 to 55 members at the end of 2010. Other income was generated through the collection of contributions to the organisation of the preliminary round tables in June and the exhibition as part of the SGA. This income was used to cover the cost of these extra events. NEW-IG merely served as an intermediary collection office in these cases.

On the GA of 10th November an updated budget was approved, including higher expected cost for the Secretariat as a result of enhanced activity for development, negotiation and implementation of the contribution scheme for beneficiaries of a JU FCH grant. Higher costs were also anticipated for external advisers as a result of the development of two sets of bylaws-changes, the description of a future roll-out project for hydrogen vehicles and project support for setting up a coalition to stimulate the introduction of hydrogen-based city buses across Europe. Moreover, a late invoice for services from Ernst & Young in relation to the VAT exemption and -recovery process had to be taken in 2010.



FINANCIAL OVERVIEW

Income	Budget 2010	Revised budget 31/12/2010	Actual 31/12/2010
Income from Members	605,510	565,250	574,250
Other Income	0	58,200	77,834
Total Income	605,510	623,450	652,084
Total Costs	369,592	481,616	523,904
Net NEW-IG Income/(expenditure)	235,918	141,834	128,180
JTI contribution (prior year adjustment)			-196,000
Net NEW-IG Income/(expenditure)	235,918	141,834	324,180

NEW-IG (INCLUDING PPFA) FINANCIAL OVERVIEW

31st December 2010 Balance Sheet

Assets	2009	2010	Liabilities	2009	2010
Fixed Assets	184	0	Suppliers	-16,140	-54,449
Deposits	7,714	0	Accruals	-5,000	-6,16
Due from Members	245,830	365,797	Provision PO	-196,000	0
			Deferred Income	0	-568,25
Allowance for Bad Debts	-122,255	-26,650	FCH JU (running costs PO)		-1,154,850
Due From Consortium Partners	0	0			
			Net Accumulated reserves bfwf	-723,06	-601,15
VAT	181,699	47,168	Result for the year	121,911	-324,18
Accruals	655	0			
Bank NEW-IG	504,462	1,167,874			
Bank PPFA	-	1,154,850			
Total Assets	818,289	2,709,039	Total Liabilities	-818,289	-2,709,039



Only a portfolio of power-trains can satisfy the needs of consumers and the environment.



(A Portfolio of power-trains for Europe: a fact-bases analysis)

13 GLOSSARY

AIP

Annual Implementation Plan

CHP

Combined Heat & Power

CORDIS

Community Research and Development Information Service for Science, Research and Development

EC

European Commission

FCH JU

Fuel Cells and Hydrogen Joint Undertaking - unique public-private partnership supporting research, technological development and demonstration of FCH technologies

FCH

Fuel cells and hydrogen

FP7

Seventh Framework Programme for Research and Technological Development – a EU-led tool to promote Europe's technological competitiveness in strategic areas

GA

General Assembly

IG

Industry Grouping (also NEW-IG) – one of the FCH JU's partners together with the EC and RG

JU

Joint Technology Initiative – European Union-led mechanisms for funding integrated industrial research, based on long-term public-private partnerships.

MAIP

Multi-Annual Implementation Plan

NEW-IG

New Energy World Industry Grouping (also Industry Grouping or IG).

PO

Programme Office – coordination office of the FCH JU

RTD

Technological development and demonstration

RG

Research Grouping (also N.ERGHY) – one of the FCH JU's partners together with the EC and IG

SGA

Stakeholder General Assembly

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