






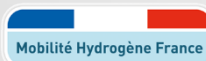
H2 MOBILITÉ FRANCE

Study for a Fuel Cell Electric Vehicle national deployment plan

H2 MOBILITÉ FRANCE CONSORTIUM SPANS FROM ENERGY COMPANIES TO REGIONS

Government	   
Energy companies	  
Hydrogen and HRS Producers	   
Vehicle and Fuel Cells	     
Electrolyser providers	   
Research organisations	  
Regions	   
EU and French Associations	  

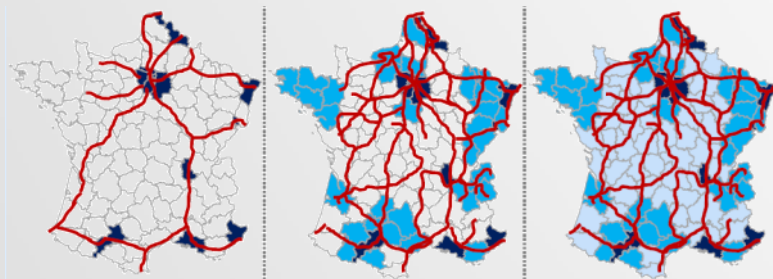
Source :



A NATIONWIDE APPROACH WAS INVESTIGATED AT FIRST

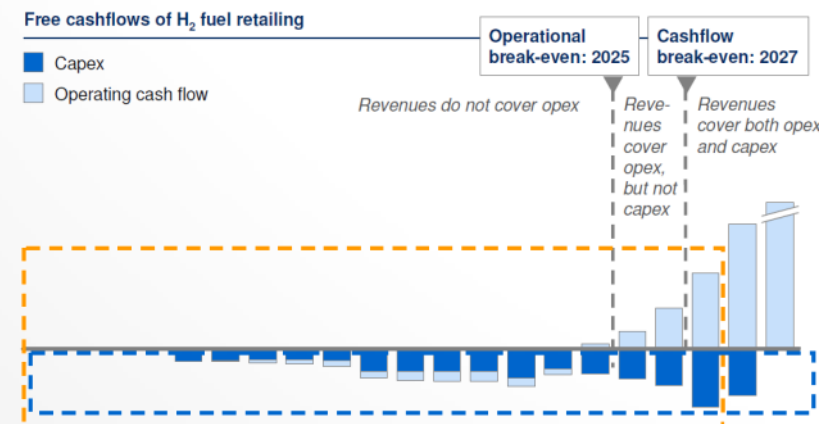
- We followed the approach based on UK and Germany data and methodologies
- For a real passenger car market, a nation-wide infrastructure is needed from the very start
- This requires large investments and generates operating losses the early years

Global H2 infrastructure deployment
Nation-wide from scratch



Source :  Mobilité Hydrogène France

600M€ on 10 years of investment



FIRST ANALYSIS OF MARKET SEGMENTS HIGHLIGHTED THE ROLE OF CLUSTERS OF CAPTIVE FLEETS

- Captive Fleet definition
 - Fleet vehicles with predictable driving and refuelling patterns
 - Vehicles making regular visits to or overnight parking at a depot



Delivery/utility



Taxis



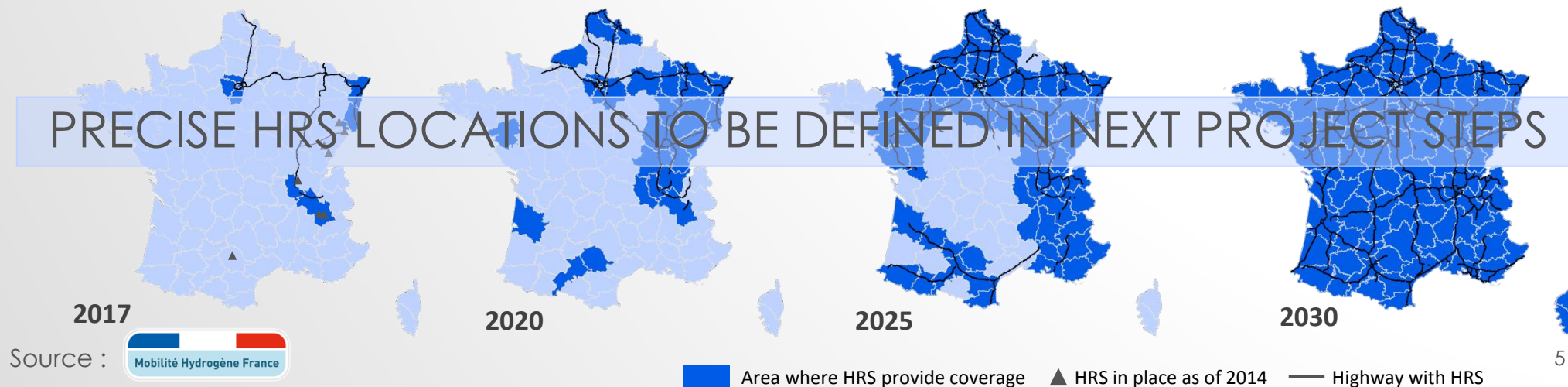
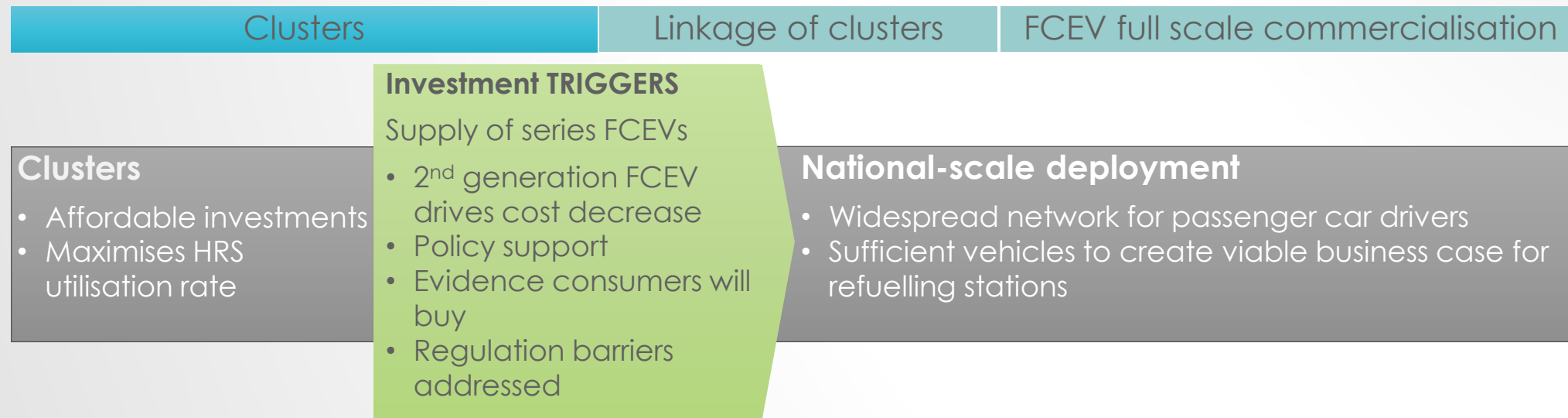
Urban duty logistics



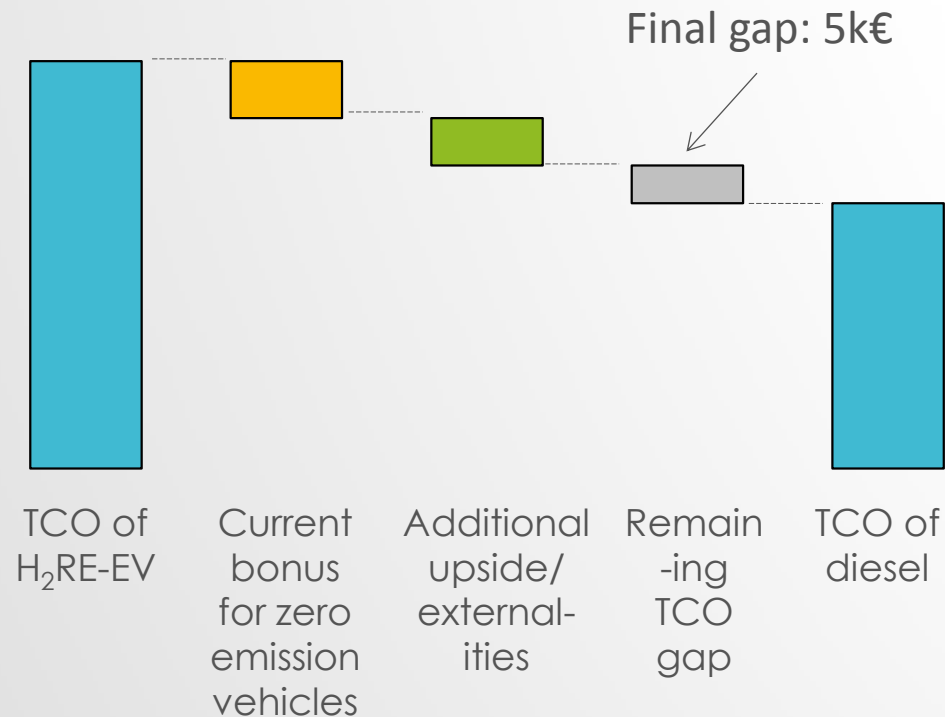
Fleet cars



CAPTIVE FLEET APPROACH: A WAY OF STARTING THE MARKET, AHEAD OF A 3 PHASE NATIONAL ROLLOUT



WITH H₂ LIGHT DUTY VEHICLES THE TCO₁ GAP VS. DIESEL COULD BE CLOSE TO 5k€



- Significant upside/externalities⁽²⁾
 - Increased number of addressable duty cycles compared with battery electric vehicles
 - Reduced accident rate for electric powertrains due to lower driver fatigue
 - Increased vehicle availability due to rapid vehicle fuelling
- And Local Initiatives

REGIONS SUPPORT MEANS VALUABLE EXTERNALITIES

- Ease Access to restricted access areas
- Authorize night delivery for silent and non polluting vehicles
- Create Delivery private/public organizations using non polluting vehicles
- Facilitate authorizations for HRS deployments
- Organize communication around hydrogen solutions and help to find new customers
- Add Hydrogen in vehicles RFI/RFP/RFQ



HYWAY PROJECT

WORLD FIRST DEPLOYMENT OF A 50 CARS CLUSTER

- Managed by Tenerdis
- In Grenoble and Lyon, two HRS:
 - Lyon, Port Edouard Hériot
 - Grenoble, GEG
- With ADEME and Région Rhône-Alpes.



OUR FIRST CUSTOMERS

Transport



Administration



Services



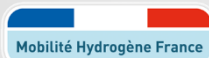
Industries



Construction



Source :



NEXT STEPS: DEPLOY CLUSTERS IN FRANCE AND EU



Open HRS end of 2015



Open in 2016-2018



Short list for 2017-2019





THANK YOU