

U.S. Department of Energy Hydrogen and Fuel Cell Technologies Office Overview

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Director, Hydrogen and Fuel Cell Technologies Office

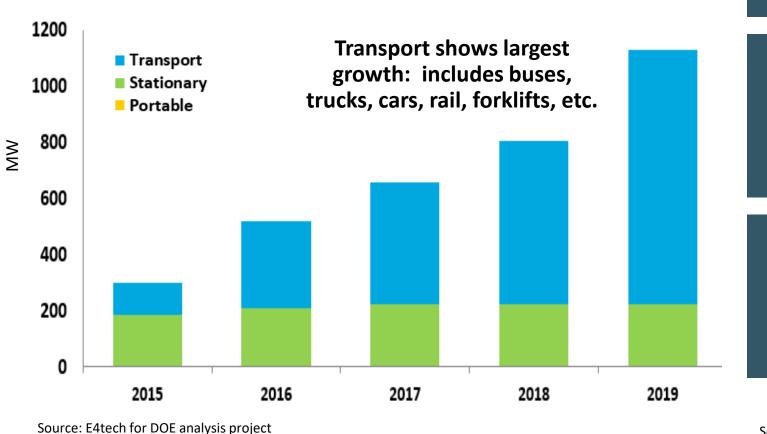
Washington DC- January 2021





Hydrogen and Fuel Cell Technology Growth Worldwide

Global fuel cell shipments surpass 1 GW



25-fold increase in electrolyzers deployed in the last decade

<1MW in 2010 to >25 MW by the end of 2019

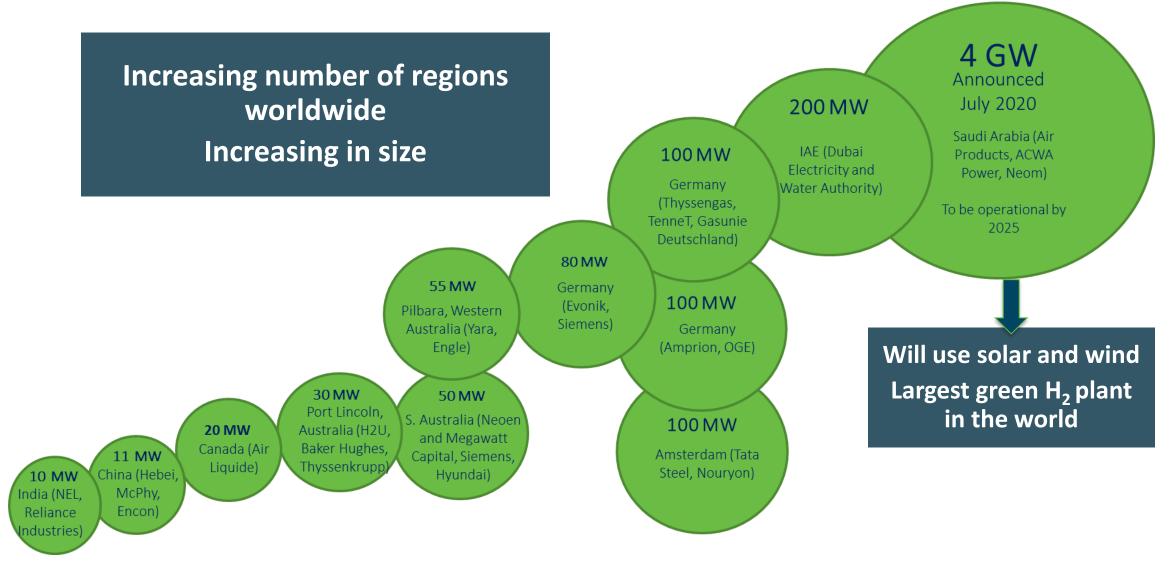
GW scale announcements in 2020

Global FCEVs doubled to >25,200 >12.3K sold in 2019 vs. 5.8K in 2018

470 H₂ fueling stations worldwide > 20% increase from 2018

Source: IEA (2020), Hydrogen, IEA, Paris, https://www.iea.org/reports/hydrogen

Examples of Electrolyzer Deployments and Plans... by 2025

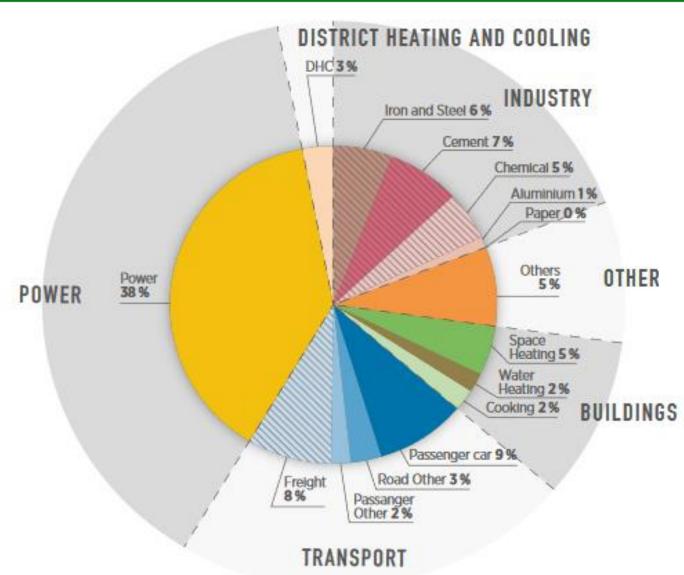


Adapted from various sources, including US Hydrogen Industry Roadmap

Global Drivers and Energy Related Carbon Emissions by Sector

Drivers include:

- Emissions reduction
- Energy security
- Economic growth
- Resiliency
- Energy efficiency
- Innovation potential
- Environmental benefits



Sectors today with no economically scalable option for deep emission reductions

Source: IRENA, 2017a from: https://www.irena.org/-/media/Files/IRENA/Agency/Publication/2018/Sep/IRENA_Hydrogen_from_renewable_power_2018.pdf

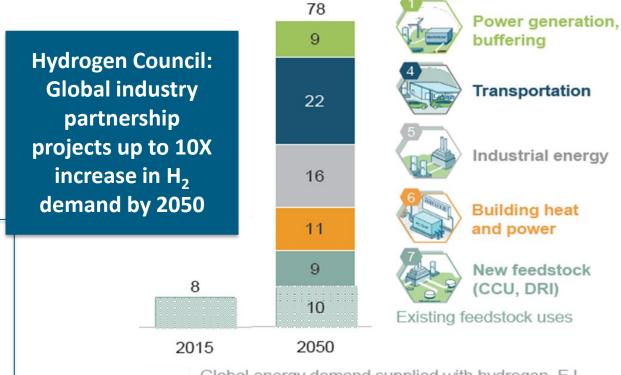
Roadmaps and Plans Developing Worldwide



6 Gt

H2 Ministerial Global Action Agenda Goals: "10, 10, 10"

10M systems, 10K stations, 10 years



H2 Council Global Impact Potential by 2050

Global energy demand supplied with hydrogen, EJ

18%

of final energy

demand

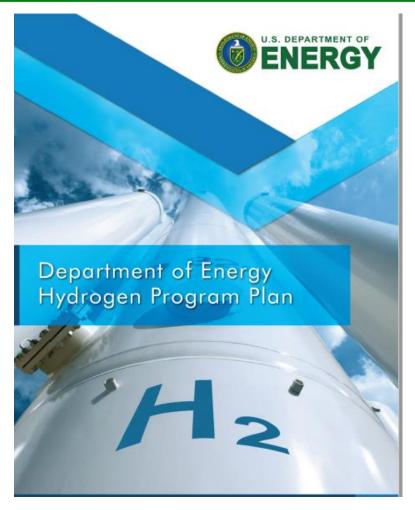
(hydrogen and

equipment)

U.S. Department of Energy Hydrogen and Fuel Cell Technologies Office Update

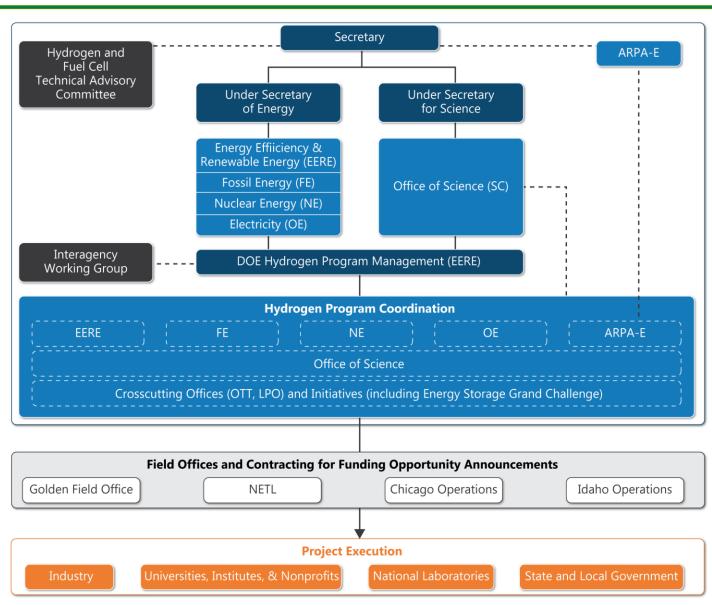
US DOE Hydrogen Program Plan Released November 2020





www.hydrogen.energy.gov

Includes multiple offices across DOE



Hydrogen Program Vision and Objectives





Vision

The Program's vision is a prosperous future for the nation, in which clean hydrogen energy technologies are affordable, widely available and reliable, and are an integral part of multiple sectors of the economy across the country.

The Program works in partnership with stakeholders to:

- Overcome technical barriers through basic and applied research and development
- Integrate, demonstrate, and validate "first-of-a-kind" hydrogen and related technologies
- Accelerate the transition of innovations and technologies to the private sector
- Address institutional issues including safety concerns, education and workforce development, and the development of codes and standards
- for federal programs to catalyze a sustainable market and concomitant benefits to the economy, the environment, and energy security

Portfolio Includes Hydrogen Production from Diverse Sources and Pathways

FOSSIL RESOURCES H₂O SPLITTING **BIOMASS/WASTE** Electrolyzers can be grid-tied, or directly Low-cost, large-scale hydrogen Options include biogas reforming and fermentation of waste streams production with CCUS coupled with renewables New options include byproduct Byproduct benefits include clean water, New direct water-splitting technologies production, such as solid carbon electricity, and chemicals offer longer-term options Coal Direct-**Biomass** Gasification Solar Conversion with CCUS High Temp. Waste **Natural Gas** Electrolysis to Conversion Energy with CCUS PEC Low Temp. **Electrolysis SMR ADG Electrolysis**

Key Program Targets and Key R&D Office Activities



Examples of Key DOE Hydrogen Program Targets

DOE targets are application-specific and developed with stakeholder input to enable competitiveness with incumbent and emerging technologies. These targets guide the R&D community and inform the Program's portfolio of activities. Examples include:

- \$2/kg for hydrogen production and \$2/kg for delivery and dispensing for transportation applications
- \$1/kg hydrogen for industrial and stationary power generation applications
- Fuel cell system cost of \$80/kW with 25,000-hour durability for long-haul heavy-duty trucks
- On-board vehicular hydrogen storage at \$8/kWh, 2.2 kWh/kg, and 1.7kWh/l
- Electrolyzer capital cost of \$300/kW, 80,000 hour durability, and 65% system efficiency
- Fuel cell system cost of \$900/kW and 40,000 hour durability for fuel-flexible stationary high-temperature fuel cells

EERE Hydrogen

Feedstocks:

Renewables and Water

Technologies:

- Electrolysis—Low- and High-Temperature
- Advanced Water Splitting—Solar/High-Temp Thermochemical, Photoelectrochemical
- Biological Approaches

FE Hydrogen

Feedstocks:

Fossil Fuels—Coal and Natural Gas

Technologies:

- Gasification, Reforming, Pyrolysis
- Advanced Approaches—Co-firing and Modular Systems
- Natural Gas to Solid Carbon plus Hydrogen

Areas of Collaboration

Reversible Fuel Cells, Biomass, Municipal Solid Waste, Plastics
Polygeneration including Co-Gasification with Biomass
High-Temperature Electrolysis, System Integration

Feedstocks:

· Nuclear Fuels and Water

Technologies:

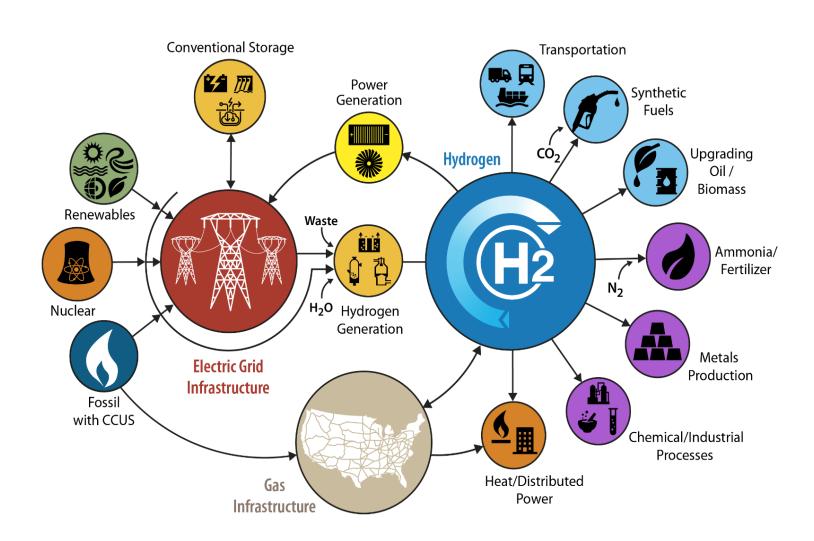
- Electrolysis Systems for Nuclear
- Advanced Nuclear Reactors
- System Integration and Controls LWRs and Advanced Reactors

NE Hydrogen

Crosscutting R&D Offices: Office of Science (SC) and ARPA-E

Fundamental Science and Advanced Innovative Concepts

H2@Scale: Enabling affordable, reliable, clean, and secure energy



- Hydrogen can address specific applications across sectors that are hard to decarbonize
- Today: 10MMT H₂ in the U.S.
- Economic Potential: 2 to 4x more

Strategies

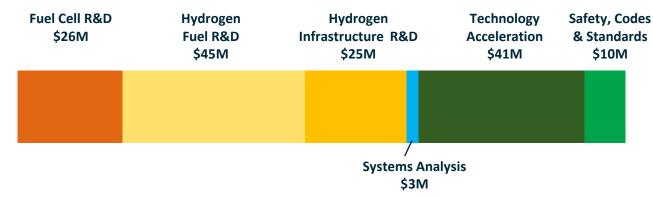
- Scale up technologies in key sectors
- Continue R&D to reduce cost and improve performance, reliability
- Address enablers: harmonization of codes, standards, safety, global supply chain, workforce development, sustainable markets

Source: U.S. DOE Hydrogen and Fuel Cell Technologies Office, https://www.energy.gov/eere/fuelcells/h2scale

Budget and Focus Areas in EERE H₂ and Fuel Cell Technologies Office

EERE HFTO Activities	FY 2020 (\$K)
Fuel Cell R&D	26,000
Hydrogen Fuel R&D	45,000
Hydrogen Infrastructure R&D (included in Hydrogen Fuel in FY21)	25,000
Systems Development & Integration (Technology Acceleration)	41,000
Safety, Codes, and Standards (included in Systems Development & Integration in FY21)	10,000
Data, Modeling and Analysis	3,000
Total	\$150,000

Hydrogen and Fuel Cells Breakdown FY 2020



- Production: Water splitting electrolysis (high and low temperature), PEC, STCH, biomass/biological
- Infrastructure: Materials, delivery, components & systems
- Storage: materials-based, carriers, tanks, liquid
- **Fuel cells**: materials, components, systems, reversible FCs
- Systems Development & Integration: Tech Acceleration includes hybrid/grid integration, new markets, heavy duty, energy storage, manufacturing industrial applications (e.g. steel) safety, codes, standard, workforce development

*Will be moved under Hydrogen Fuel R&D in FY 2021

Note: Office of Fossil Energy covers fossil fuels to H₂

DOE Hydrogen and Fuel Cell Technologies Office Focus Areas

Mission

Research, development, and innovation in hydrogen and fuel cell technologies leading to:

- Energy security
- Energy resiliency
- Strong domestic economy

Enabling



Key R&D Budget Sub-Programs and Focus Areas



Fuel Cells



Hydrogen

Systems Development & Integration

- Cost, durability, efficiency
- Components (catalysts, electrodes) & systems
- Focus on heavy duty applications (trucks, marine, data centers, rail, air, etc.)
- Hydrogen production, infrastructure/delivery, storage (for transport and stationary storage)
- Cost, efficiency, reliability & availability.
- Hybrid, grid integrated systems, energy storage
- Safety, codes & standards
- Technology acceleration, workforce development

Key Goals

Reduce the cost of:

- Heavy duty fuel cells by 2X to \$80/kW
- Electrolyzers by 3 to 5x to \$300/kW
- Storage tanks by over 40% to \$9/kWh
- H₂ delivery and dispensing by 4 to 5x to \$2/kg
- H₂ production by 2 to 3x to \$2/kg
 Improve fuel cell durability 5x to 25,000 hours

Double energy density for onboard storage to 1.7 kWh/L

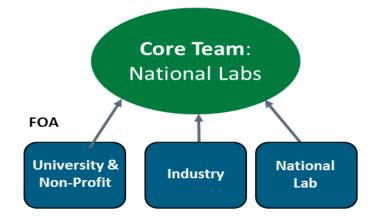
Data, Modeling, Analysis: Assess pathways, impacts; set targets, guide R&D

Budget: \$150M in FY2020

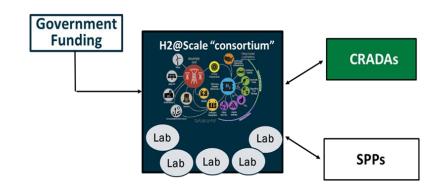
Key Programmatic Areas

Includes early stage R&D: Funding Opportunity Announcements (FOAs) for industry, universities and national labs, including consortia

And includes later stage RD&D: Leverages private sector for large-scale demonstrations and cost-shared RD&D. Demos in TX, FL, Midwest, CA and more



2 New Lab Consortia
Just Announced:
H2NEW and
Million Mile Fuel Cell
Truck Consortium







CRADA = Cooperative Research and Development Agreement SPP- Strategic Partnership Project ('Work for Others')





Over 25 CRADA projects with private sector

Just Announced: \$64M for 18 projects including R&D and demonstrations at ports and datacenters, and a workforce development program. Includes collaboration with Advanced Manufacturing Office and Vehicles Office in EERE

Examples of DOE-Funded Innovation and Impact

Impact due to HFTO Funding **Innovation**

H₂ and fuel cell

enabled by HFTO funds

Approx.

of H₂ and

fuel cell patents come from National Labs

Market Impact

More Than

Technologies

Commercialized

by private industry

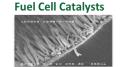
And Over with potential

to be commercial in

the next 3 - 5 years

Can be traced back to HFTO R&D

Examples of Technologies Enabled



Electrolyzer System

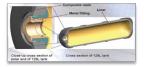
Proton Series

PEM Electrolyzer System

Hydrogen Tube Trailers



Hydrogen Tanks



Quantum Technologies



Electrolyzers

- Small scale H₂ fueler now available
- 5 to 20 kg unit, 700 bar fueling

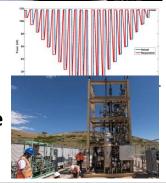
\$1M H-Prize H2Refuel Winner: SimpleFuel

First-of-a-Kind Demonstrations

- Marine application- ½ ton H₂ fueling for vessel
- Data center- 1.5 MW
- First ground support equipment
- Parcel delivery vans (2x range vs BEVs)
- Mobile H₂ fueler
- First nuclear to H₂ demos
- First tri-gen system
- Dynamic response of electrolyzers and systems integration
- First H₂+CO₂ to renewable methane demo
- H₂/NG blending







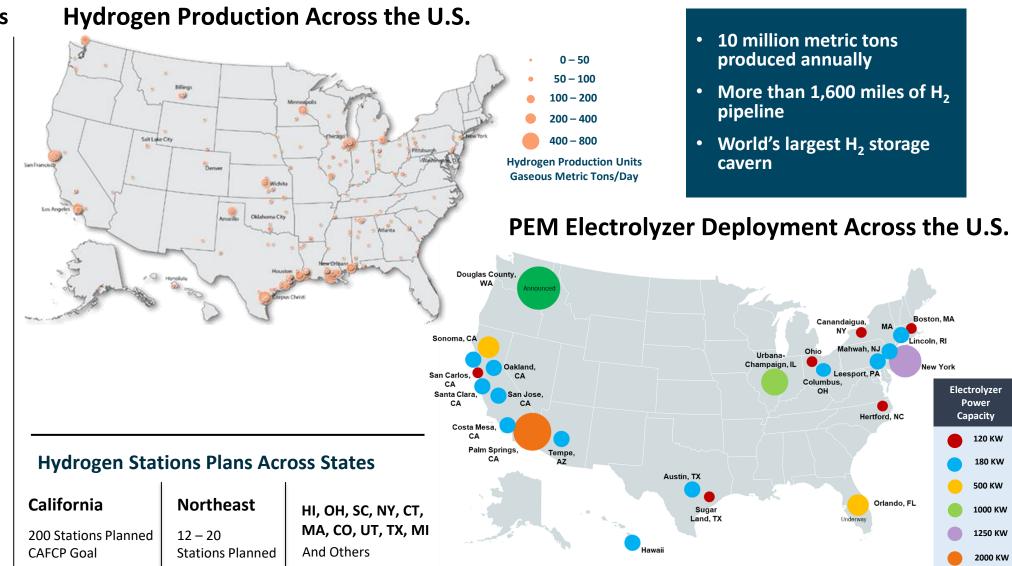
Example: American Recovery Act cofunded few hundred fuel cell forklifts and backup power units for cell phone towers



Today ~ 40,000 systems commercially deployed at major companies, millions of H₂ fuelings to date

Snapshot of Hydrogen and Fuel Cells in the U.S.

Examples of Applications >500MW **Backup Power** >35,000 **Forklifts** >14 MW **PEM* Electrolyzers** >60 **Fuel Cell Buses** >45 H₂ Retail Stations ~9,000 **Fuel Cell Cars**



5000 KW

* Polymer electrolyte membrane

Fuel Cell Stationary Power for Multiple Applications

Fuel cells provided backup power during Hurricane Sandy in the U.S. Northeast



Fuel cell power for maritime ports demonstrated in Honolulu, Hawaii



Fuel cells included for power to new World Trade Center in NYC



Over 500 MW of fuel cell stationary power installed across more than 40 US states



Fuel Cell Forklifts for Material Handling Applications



Heavy Duty Applications Emerging

Several companies developing long haul Class 8 fuel cell trucks





Fuel cell parcel truck demonstration projects by DOE + industry







Opportunities for Hydrogen and Fuel Cells

Hydrogen and Fuel cell Attributes

- Performance: Short fueling times, long range, high power
- Zero pollution from tailpipe, very low life cycle emissions
- Uses domestic sources for fuel
- Particularly suitable for hard to decarbonize applicationse.g. heavy duty trucks, marine, rail, and others

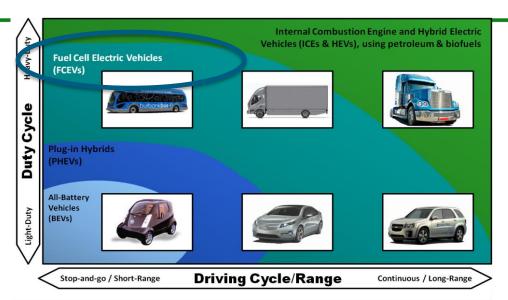
Refueling/Recharging Time:

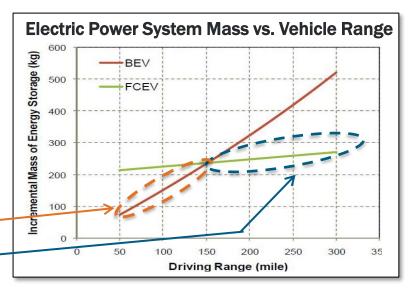
Energy Source	Rate (miles/min)	Long-Trip % Charging Time
Gasoline	150	1-2%
Hydrogen	100	<2%
EV Supercharger	6	15%

Assumptions: Gasoline & Hydrogen Electric: 350 mile range, Battery Electric: 250 mile range. Source: General Motors, with permission April 2016

For shorter distances, batteries are more effective in terms of system mass

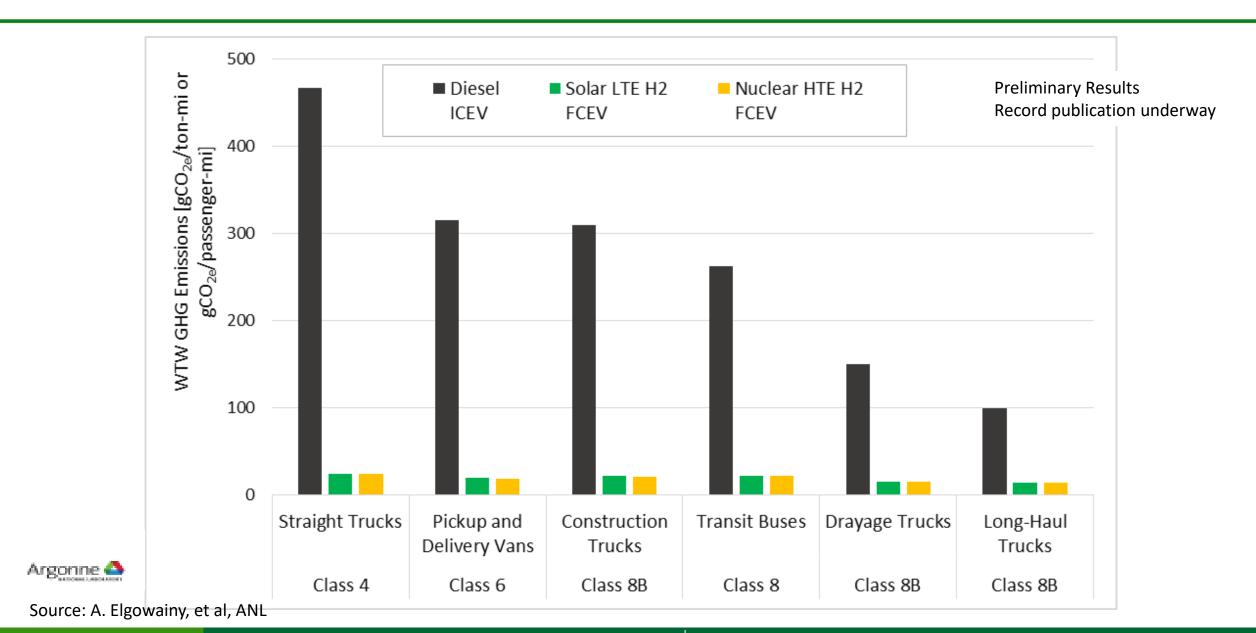
Fuel cells offer an advantage for longer driving range with less weight penalty





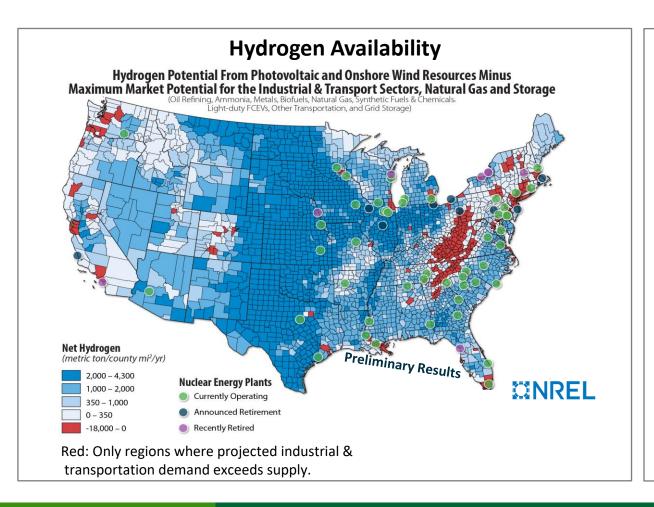
SOURCE: General Motors, Inc.

Benefits and Impacts Analyses Underway – Example



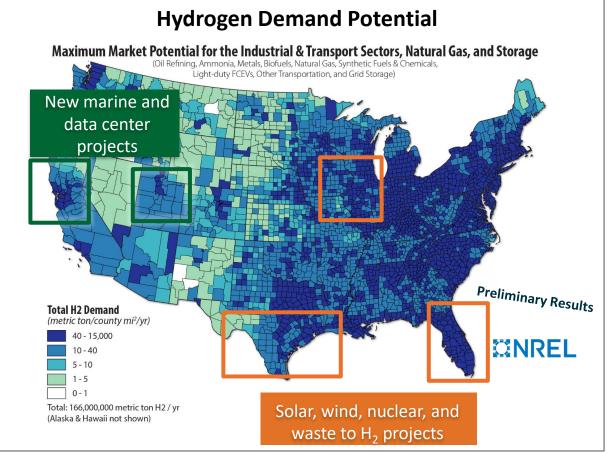
Examples of H2@Scale Analysis and Demonstration Projects

Assessing resource availability. Most regions have sufficient resources.



New H2@Scale demonstration projects cover range of applications

*Includes 1 project by Office of Nuclear Energy



Example of H2@Scale Demonstration Projects

Demonstration of H2@Scale: Different regions, hydrogen sources and end uses

Texas

Total Budget \$10.8M Wind, Solar, RNG/Waste

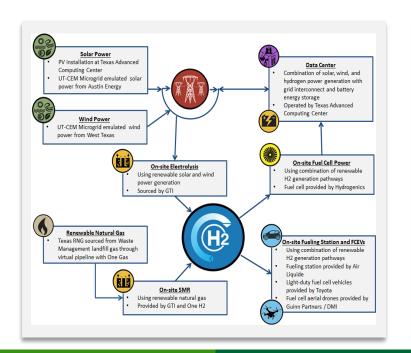
Florida

Total budget \$9.1M

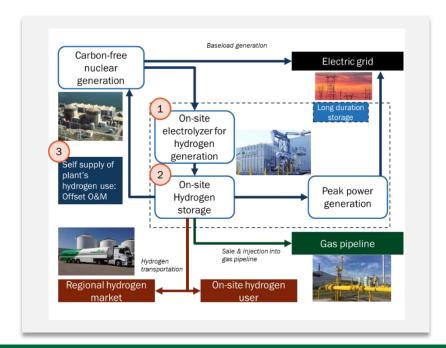
Solar-to-H₂ with End Uses

Site selection in process

Total Budget \$7.2M Nuclear-to-H₂ for at-Plant Use







Examples of H2@Scale Demonstration Projects -2020

Demonstration of H2@Scale: Different regions, hydrogen sources and end uses

Marine Application

Total Budget \$16M

Electrolyzer and fuel cell for marine application

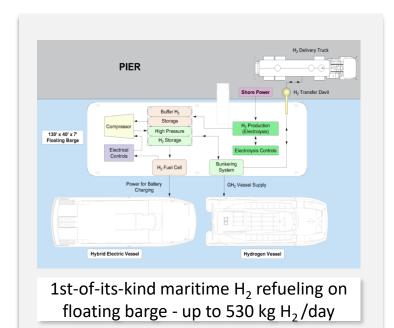
H₂ for Data Center

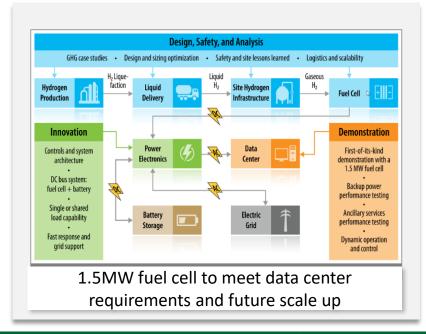
Total Budget \$13.7M PEM fuel cell for data center power

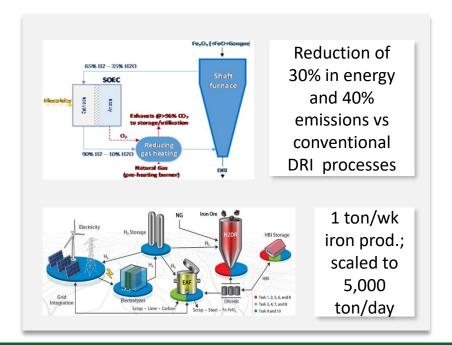
H₂ for Steel Production

Total Budgets \$5.7M & \$7.2M

DRI-process and grid-interactive steelmaking







First Carbon-Free, "Power-to-Gas" System in U.S.

Flagship Power-to-gas Project

Funded By DOE EERE In Partnership With Southern California Gas Company (SoCalGas)



- Approx. \$2.5 million funded through EERE's Solar, Hydrogen and Fuel Cells, and Bioenergy Offices along with cost share by SoCalGas
- Process uses a low-temperature water electrolyzer to produce hydrogen from renewable power, then feeds the hydrogen and carbon dioxide into a bioreactor where methanogens produce methane and water
- With minor filtration, the product gas from the bioreactor will meet pipeline quality, allowing it to be injected into the **existing natural gas infrastructure**

- Utilizes H₂+ CO₂ to generate pipeline quality natural gas (> 97% CH₄)
- Biocatalyst used in the process -Methanothermobacter thermautotrophicus

Biomethanation Process:

$$CO_2 + 4H_2 \rightarrow CH_4 + 2H_2O$$

 Industry and lab partners: Southern California Gas Company, NREL and Electrochaea

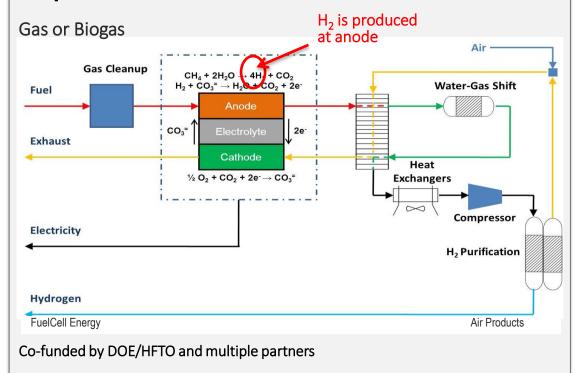
Press Release

https://www.nrel.gov/esif/partnerships-southern-california-gas.html

U.S. DEPARTMENT OF ENERGY

Example of Innovation: World's First Tri-Generation Station

- Demonstrated co-production of electricity and hydrogen with 54% efficiency
- Uses biogas from wastewater treatment plant



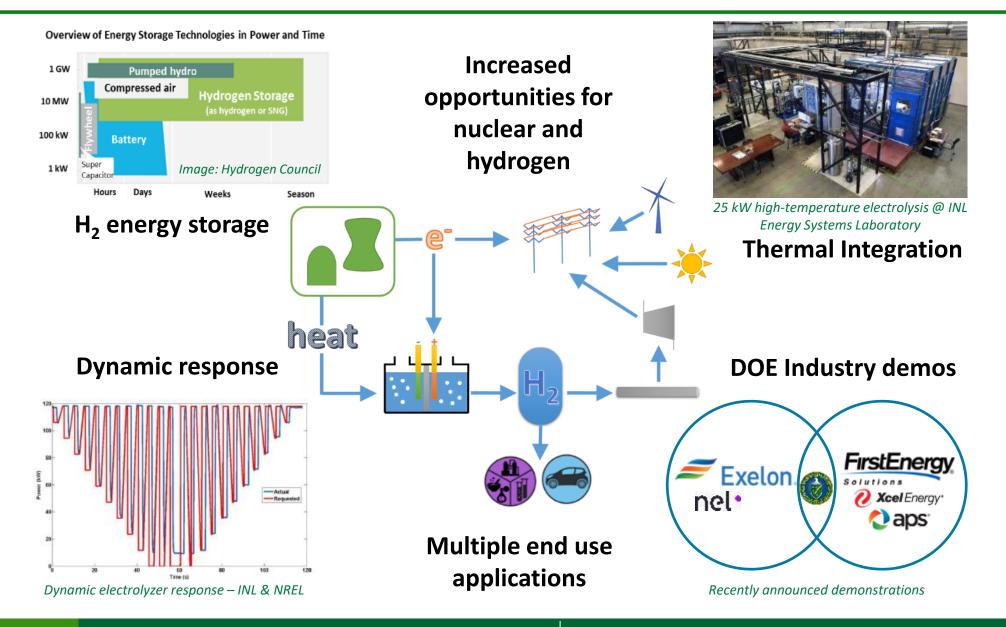
Fountain Valley Demonstration Completed

- ~250 kW of electricity
- ~100 kg/day hydrogen capacity (350 and 700 bar), enough to fuel 25 to 50 vehicles.



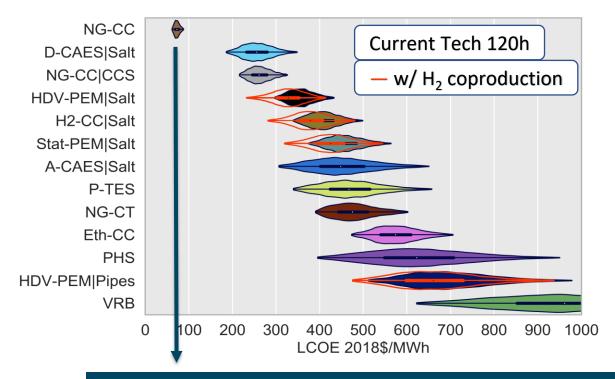
Tri-Generation co-produces power, heat and hydrogen. World's First Fuel Cell and Hydrogen Energy Station demonstration completed in Orange County

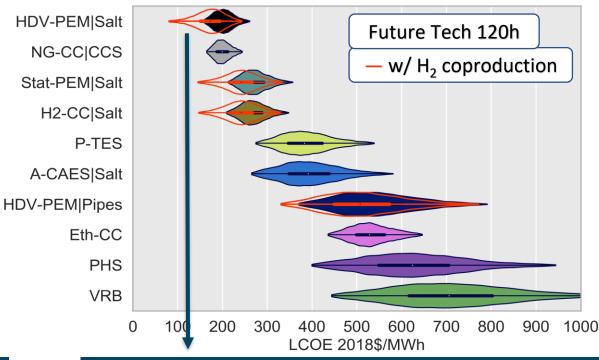
Increased Activities on Integrated/Hybrid Systems and Energy Storage



Long Duration Energy Storage and Flexible Power Generation Analysis

NREL's Techno-Economic Analysis of Long Duration Energy Storage- Preliminary Results across Technologies





Natural gas combined cycle (NG-CC) is the lowest cost option today
Wide Range of Costs for Various Technologies
\$200 to >\$1,000/MWh

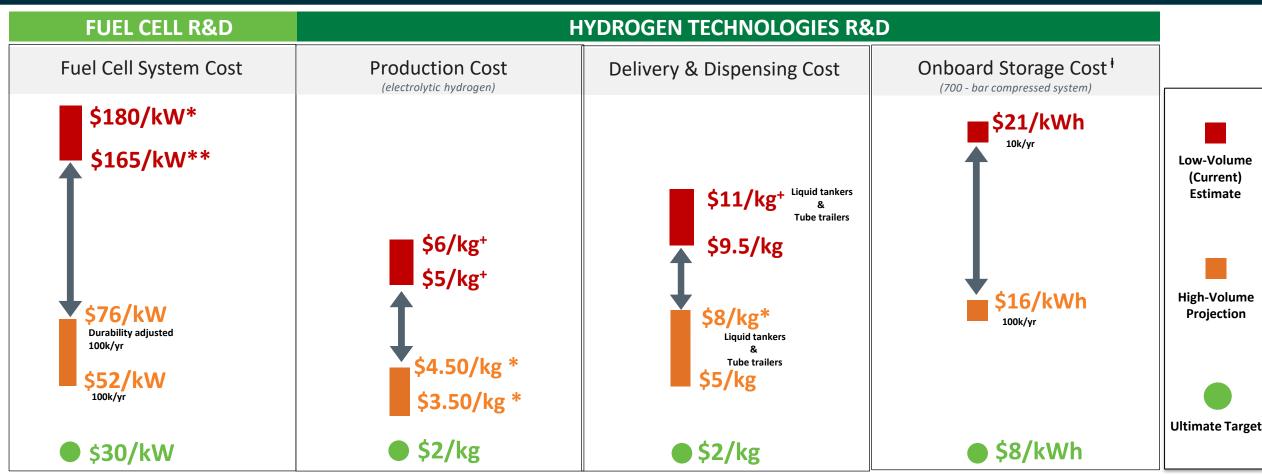
Future Scenario: Shows PEM fuel cells (for Heavy Duty Vehicle market), salt caverns + coproduction of H₂ may be most economically competitive for 120 h storage

Source: Hunter, et. al., 2020, NREL-publication in process



Technology targets guide HFTO R&D activities

Key Goals: Reduce the cost of fuel cells and hydrogen production, delivery, storage, and meet performance and durability requirements – guided by applications specific targets



^{*}Based on state of the art technology

Note: Graph is not at scale. For illustrative purposes only

^{**} Based on commercially available fuel cell cars at 3,000 systems/year

¹⁵ to 7 cents/kWh, 90% capacity factor at \$1500/kW *5 to 7 cents/kWh, 90% capacity factor at \$460/kW

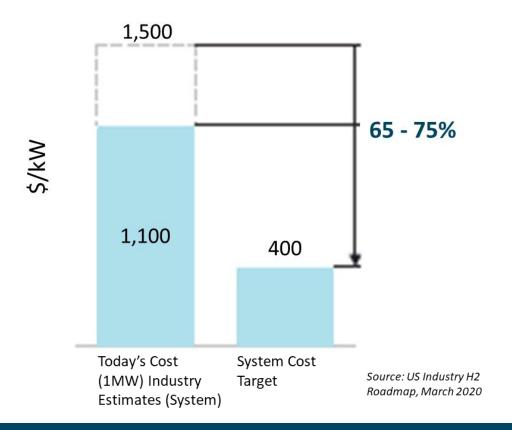
[†]For range: Delivery and dispensing at today's (2020) stations with capacity ~450 kg/day
^{*}For range: Delivery and dispensing at today's (2020) stations with capacity 450-1.000 kg/day at high volume manufacturing

Storage costs based on 2019 storage cost record

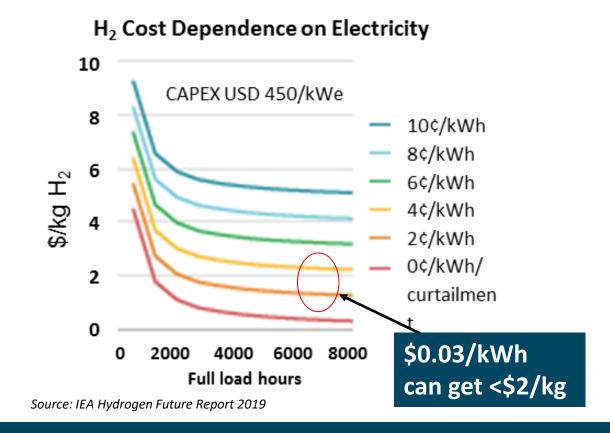
All costs based on \$2016

Electrolysis Cost – Recent Independent Analyses

Today's Polymer Electrolyte Membrane (PEM) electrolyzers require 65 75% cost reduction



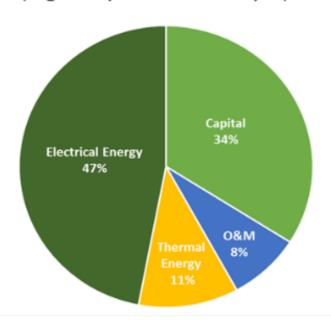
\$2/kg H2 is achievable at about \$0.03/kWh electricity cost and high utilization



Today's hydrogen cost from PEM electrolyzers: ~ \$5 to \$6/kg at \$0.05 to \$0.07/kWh

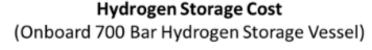
Identifying Hydrogen Cost Drivers is Key

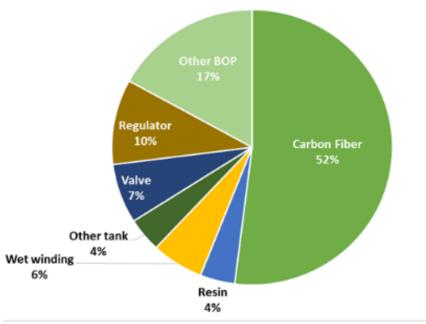




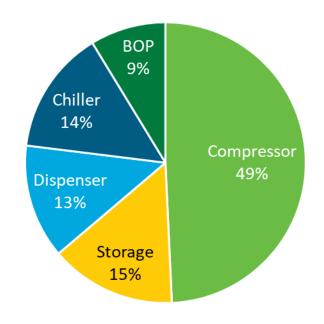
H₂ Production (Electrolysis)
Cost Drivers: **Electrical energy and capital costs**

H₂ Onboard Storage Cost
Drivers:
Carbon Fiber Precursors and
Processing



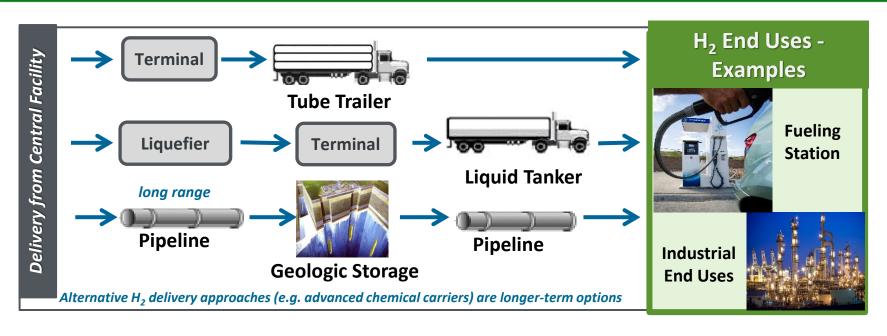


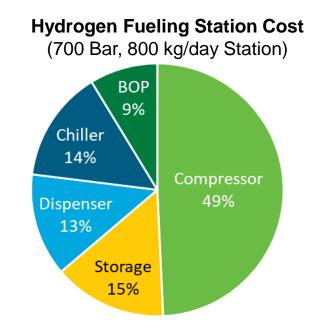
Hydrogen Fueling Station Cost¹ (700 Bar, 800 kg/day Station)



H₂ Infrastructure Cost Drivers: **Compressors and Storage**

Hydrogen Infrastructure R&D





R&D Challenges:

Cost, reliability, efficiency, and scalability of technologies for use in heavy-duty H₂ fueling stations and large-scale hydrogen distribution and materials compatibility issues

Strategy:

Near term: Affordable and reliable components and systems for H₂ transport and dispensing in

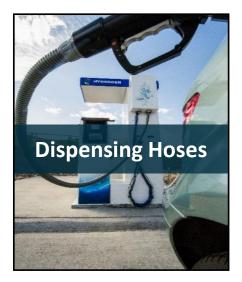
heavy-duty applications

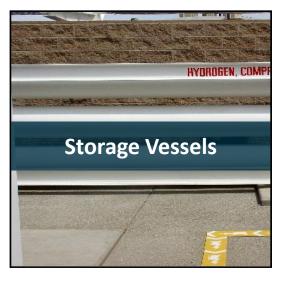
Long term: Materials and components for advanced H₂ liquefaction and carrier distribution concepts

Cross-cutting Materials Compatibility R&D



H-Mat Consortium conducts R&D on hydrogen effects on polymers and metals









- Enabling the safe use of hydrogen across applications and the development of harmonized codes and standards
- Addressing hydrogen blending with natural gas, reducing expansion of seals, improving life of vessels through improved understanding of crack nucleation, enhancing fracture toughness of high-strength steels, and more
- Over 40 partners with industry, labs, universities











For More **Information**

Website: h-mat.org

Email: h-matinfo@pnnl.gov

20% hydrogen blends could enable a doubling¹ of U.S. renewables consumption

% H₂/NG blends vary widely from <1% to 30%. Up to 15% may be feasible without significant modification to existing infrastructure

"HyBlend": R&D project to enable H₂ blending and address challenges

U.S. Projected Renewable Energy Consumption in Power Generation in 2019: ~703 TWh (Source: AEO 2020)
 hydrogen blend in the U.S. by volume could enable >750 TWh of clean electricity to produce hydrogen via electrolysis. (Source: Elgowainy, et al, ANL, 2020)



"No one can whistle a symphony. It takes a whole orchestra to play it."

- H. Luccock

Examples of Global Collaboration

Coordinating across global partnerships: IPHE, Ministerials, Mission Innovation, IEA, etc.
Global Center for Hydrogen Safety established to share best practices, training resources and information



The International Partnership for Hydrogen and Fuel Cells in the Economy

Enabling the global adoption of hydrogen and fuel cells in the economy





Elected Chair and Vice-Chair, 2018

New Chair: Dec 2020: The Netherlands Vice Chairs: U.S. Japan

www.iphe.net

Key Activities: Harmonization of codes & standards, Information sharing on safety, policies, regulations, analysis, education.

Task force on developing H₂ production analysis methodology to facilitate international trade, global RD&D monitoring



www.aiche.org/CHS





Includes over 40 partners from industry, government and academia

Access to >110 countries, 60,000 members



Hydrogen and Clean Energy Ministerials Mission Innovation Hydrogen Challenge International Energy Agency

Hydrogen Production Analysis Task Force (H2PA TF)



Addressing Priority from Industry and Governments

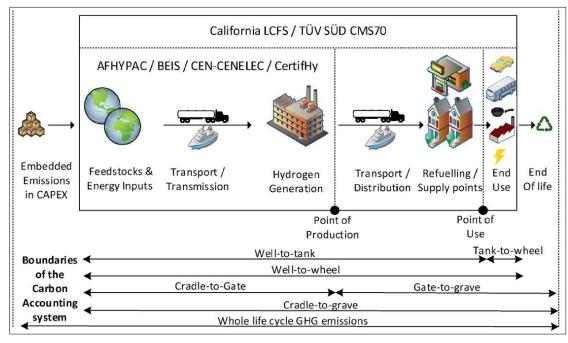
 Harmonize approach and develop framework to facilitate global trade of hydrogen

Scope

 Develop a mutually agreed upon analytical methodology for determining greenhouse gas (GHG) and other emissions associated with H2 production.

Next Steps and Engagement

 Continue to engage stakeholders, industry and experts to develop framework for methodology



(Source: Abad et al., Energy policy 138 (2020) 111300)

Application of methodology will help facilitate market valuation and global trade in 'clean' hydrogen by recommending a common approach with adoption not mandatory and subject to each member's discretion and circumstance.







IPHE E&O Working Group Early Career Network

- Established by IPHE's Education & Outreach (E&O) Working Group to promote international H_2 and fuel cell awareness and launch a platform for the next generation of H_2 and fuel cell leaders
- Open to students, post-docs and early career professionals



Stephanie Azubike Chair

Learn more: iphe.net/early-career-chapter

Membership form: https://forms.gle/gUnWyV7gU4QqoHLm7



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Priya Buddhavarapu Co-Chair

Workforce Development, Training and STEM

Hydrogen Education for a Decarbonized Global Economy (H2EDGE)



Objectives:

- Enhance workforce readiness through training and education (T&E)
- Develop T&E materials and deliver professional training courses and university curriculum content
- Collaborate with industry and university partners to develop certifications, credentials, qualifications, and standards for training and education needs

Recipient: EPRI

Partners include: GTI, OSU, Purdue, UD, EA

June 2020: DOE EERE announces \$20M investment at U of TN to advance workforce development in emerging energy fields, partnering with ORNL and Oak Ridge Institute (ORI)

- ORI will develop model workforce development program and partnerships with universities, agencies, and national labs
- Focuses on EERE related technologies including hydrogen and fuel cells

Summary of ways to engage with DOE HFTO



In Development

New Lab Consortia:

- H2NEW: Electrolyzer Consortium
- Million Mile
 Fuel Cell Truck
 Consortium

Lab - Industry Bridge

- H2@Scale Consortium
- CRADAs
- SPPs (WFOs)
- L'Innovator
- Technology
 Commercialization Fund

Private Sector

- FOA projects
- SBIRs
- Prizes
- State funding
- Demos & Deployments
- Partnerships
- US Industry Roadmap



H₂ materials R&D, enable codes & standards, reduce regulatory barriers

Safety – Lessons learned, best practices, enable safe infrastructure across sectors













Resources and Events

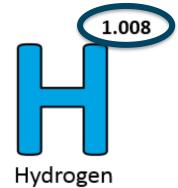
Save the Date

Week of June 7, 2021
Annual Merit Review and
Peer Evaluation Meeting
(AMR) for the DOE Hydrogen
and Fuel Cells Program



Oct 8 - Hydrogen and Fuel Cells Day 1 1.008

(Held on its very own atomic weight-day)



Resources



Join Monthly
H2IQ Hour Webinars

Download H2IQ For Free <u>energy.gov/eere/fuelcells/fuel-cell-technologies-office-webinars</u>

energy.gov/eere/fuelcells/downloads/
increase-your-h2iq-training-resource



Visit H2tools.Org For Hydrogen Safety And Lessons Learned https://h2tools.org/



Learn more:

Sign up to receive hydrogen and fuel cell updates

www.energy.gov/eere/fuelcells/fuel-cell-technologies-office-newsletter

Learn more at: energy.gov/eere/fuelcells AND www.hydrogen.energy.gov

Thank You

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Looking for more info?

#H2IQ

hydrogen.energy.gov