Roland Berger

Bringing hydrogen into the mix: opportunities for growth

Our hydrogen and fuel cell technology related expertise for strategy, investments, market entry and sourcing

Roland Berger covers the entire hydrogen value chain and has supported projects around the globe

Selected Roland Berger fuel cell and hydrogen experience around the world

We work along the entire hydrogen value chain

- Production: grey, blue, green, pink, turquoise
- Conversion, transport, storage, distribution, refueling
- End users in transport, energy, industry

... including the underlying industrial supply chains

...for private businesses and public authorities

- Private industry: energy and technology companies, equipment suppliers, infrastructure developers
- Public sector and associations at regional, national and supranational levels
- Financial investors
- Start-ups

...on a broad range of strategic assignments

- Market entry strategies, business model design, technology roadmaps
- Project development support, feasibility studies and public funding support
- M&A support and commercial due diligences
- Policy and sectoral studies

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By now hydrogen has become an integral part of energy policy making in most countries around the world

Overview of the state of play of selected national hydrogen strategies

- Half of the countries with a hydrogen strategy still do not have a clear position on hydrogen imports and exports
- Only the more industrially developed nations (e.g., Japan, South Korea) clearly consider hydrogen imports due to their limited production capacity
- Other countries (e.g., AU, ES, NO, RU, MO and UK) envision hydrogen exports in the long run depending on the development of international trade opportunities

Source: LBS International Hydrogen Strategies, Roland Berger

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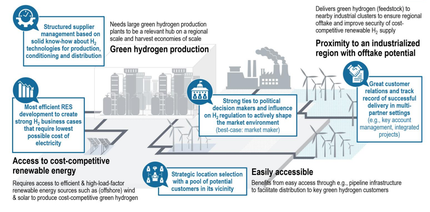
Upstream capabilities to ensure lowest possible cost as well as strong customer relations for offtake required

Required capabilities

Illustrative



Source: Roland Berger

Info about H_2