

New Energy World - Industry Grouping

# Annual Report

## 2009







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## 1. EXECUTIVE SUMMARY

### 1.1 The NEW-IG in 2009

The year of 2009 was a key milestone for the NEW-IG and the FCH JU. After the formal implementation of the Joint Undertaking (JU) at the end of 2008, efforts during this year focused on supporting the launch of the 2009 Call, stabilising and improving the Grouping's internal processes and improving internal communication between members, other JU partners and external stakeholders.

Under difficult global economic circumstances, the Grouping also secured a solid financial position through rigorous bookkeeping. The benefits of the implementation of the project fee in the Call 2009 will only be visible in 2010, but the Board recognises it as essential for the development of the organisation.

Internally, two Board members were replaced by Jan Piet van der Meer (Treasurer) in March and Lucio Gallo (leader of Stationary Committee) in October. A new Secretariat started working in June.

### 1.2 Key 2009 achievements

- 2008 Call evaluated
- 2009 Call published on time
- Improvement of Grouping's financial control and reporting
- Improvement of Secretariat's services and efficiency
- Implementation of bylaws revision, including the introduction of:
  - o Annual and multi-membership fees
  - o Detailed division by company size:  
Large, Medium, Small and Micro
  - o "Supportership" membership type
  - o Project fee in Call 2009

### 1.3 The 2008 Call - Results

The total budget for the first FCH JU Call (2008 Call) was 28.1M€. A total of 32 proposals were submitted, involving 243 partners - 43% from the Industry. One of the most important observations is that almost half of the proposals were not above the threshold. This means that only 18 proposals went through to negotiations, requesting a combined 39.64M€. Five of the topics in the 2008 Call were uncovered (+ 2 topics in the Cross-Cutting AA, not covered already at the submission phase).





In December 2009 the negotiation phase ended and 16 proposals were awarded funds totalling 61.768,807M€.

#### 1.4 The 2009 Call - Organisation, information

On 15 June the Programme Office officially opened the 2009 Call which ran until 8 October. It made available 71.3M€ in funds.

In preparation, the Grouping and its research partner organised a brokerage event in Cologne on 19 May. The Secretariat also prepared an information webinar for members and a special newsletter article entitled “Does and Don’ts when answering a Call”. Together with the Programme Office, a press release was also put out announcing the Call’s opening.

Preliminary data reveal that 50 proposals were received, 24% from Industry.

#### 1.5 AIP/Call 2010

The individual Committees of the Industry Grouping and their Research Grouping counterparts began preparations for the AIP 2010 in September 2009. Through an analysis of the previous Calls and the state of the industry and market, they developed a series of recommendations sent to the Programme Office in early 2010. These recommendations will be integrated in the Annual Implementation Plan 2010. The AIPs are the basis for the development of the yearly Calls.

#### 1.6 Bylaws, membership, project fee

Much of the work done by the NEW-IG Board and Secretariat during 2009 originated in the members’ request for a more balanced membership fees and financial contribution towards the running of the Programme Office. These developments required alterations to the Grouping’s bylaws, so a special Bylaws Taskforce was created to lead the process. In July the Extraordinary General Assembly approved the bylaws update which included several major developments:

- **Introduction of annual vs. multi-annual (3 years) fee categories.**  
Members who decided to commit to a 3-years involvement in the JU benefited from a fee discount.
- **Four separate size categories:** Large, Medium, Small and Micro.  
Previously fees were only collected according to two options: “Large & medium” and “Small & micro”. Membership fees were adapted accordingly.





- The “supportership” membership category was officially launched in October 2009. It targets organisations with a clear interest in the fuel cells and hydrogen technology, but which cannot or do not wish to participate in the Calls. Although not enjoying the privileges of a full membership, supporters will still be able to access and share information on a dedicated intranet, as well as participate in all NEW-IG events as an observer.
- Members agreed that the fairest way to cover the running costs of the Programme Office is to share them amongst the actual beneficiaries of the Call. Therefore the Industry and the Research Grouping, with the support of their members and the European Commission, have adopted the concept of a **Project Fee** which concerns every organisation applying for funding, including non-members of the Groupings. The Project Fee level is set as a percentage of the total amount of grants and is established each year by the Industry and Research Grouping's Boards. The value agreed for the 2009 Call was 4%.

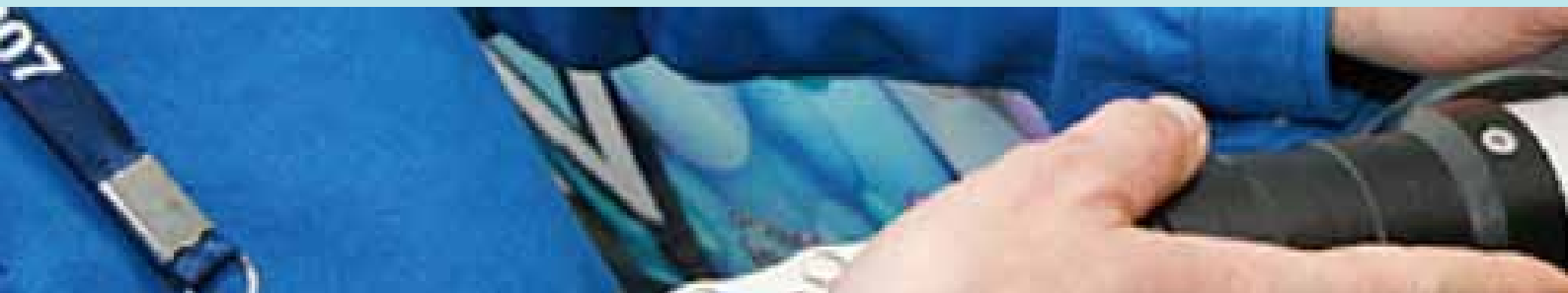
## 1.7 Improving matching of funds

The funding levels of the 2008 Call were significantly lower than expected and not aligned with those of FP7. With this in mind, the members of the FCH JU recognise the need to investigate the reasons why such low levels of real funding rates were produced for the Call.

A working group composed of IG, RG and Commission representatives was set up and given a double mandate:

- Analyse whether the matching issue can be solved without a change to the current FCH JU Regulation and;
- If it appeared that a rethinking of the Regulation was needed, the group was to prepare an issue paper, with a list of options (pros and cons), with a view to minimising the political risks linked with the Regulation review process.

Following a recommendation made at the end of 2009, on January 2010, the JU Governing Board confirmed that it was not possible to improve funding level without changing the Regulation and asked the Working Group to identify the options and analyse their consequences. Work is ongoing.







## 1.8 Stakeholder outreach & communications

Several organisations and individual stakeholders have an interest in the Groupings' activities and the NEW-IG strives to engage them in a frank dialogue. To encourage this dialogue the Grouping organised and co-organised several activities throughout 2009. It also produced different types of informative materials.

On events, the Grouping was involved in the organisation of the Annual FCH JU's Stakeholders General Assembly (SGA) which welcomed around 300 participants in Brussels in October. To maximise this opportunity, the NEW-IG also organised two different parallel activities: a Drive N' Ride for 50 guests and the 1st FCH Stakeholders Dinner.

Ahead of the important COP15 meetings in Copenhagen, the NEW-IG organised the H2 Parade, which involved 14 FCH vehicles crossing the bridge between Sweden and Denmark. This event attracted the attention of a wide group of political and media (over 60 articles) audiences.

The Grouping also improved its internal communications by upgrading the members' newsletter (now with 10 issues a year) and introducing a weekly media report.

In order to increase the value of the Grouping's presence at the SGA and improve the outreach to prospect members, two types of promotional materials were produced in 2009: a brochure and a stand which will be easily used at future events.



## 1.9 Finance

The cash position for 2009 is €504.462, with €86.575 still to be recovered from free from 2009 and previous years. 2009 showed a net result of €121.698, however after consolidating with FCHInstruct, the year's final net result is - €121.911.

Financial achievements of 2009 were:

- Clean up of the NEW-IG accounting and correction of inaccuracies
- Catch up on recovery of overdue membership-fees 2008/2009
- Recovery of FCHInstruct Grant
- VAT return of 90% accepted





# FOREWORD FROM CHAIRMAN

The past year has been a very challenging period for the world's capital markets, with the global financial crisis impacting on the economies of all countries. Through the turmoil, and by taking solid steps, NEW-IG steadily advanced towards its objectives. I am delighted to report a year of decisive advances for the Grouping.

I am very encouraged by how we substantially increased our level of activity and extended our relationship with stakeholders. In an environment where decision making has been slower than usual, this is a real achievement. During 2009 we implemented our second Call and initiated the discussions around the third, which we expect to launch in June 2010. We also took very seriously our members' feedback and took concrete steps to improve our membership fee system, the Secretariat's services and promoting FCH's benefits through open and honest dialogue. Through our work I believe we are sending the right message across Europe and the world: we are serious in our belief in the benefits of our products.

In a year of leadership change in the European Institutions, our own Grouping saw the replacement of two Board members and welcomed a new Secretariat team.

On behalf of the Board, I would like to thank all members for their tremendous work and commitment to the development of this technology.



“ I am very encouraged by how we substantially increased our level of activity and extended our relationship with stakeholders ”



**Gijs Vriesman**

*Chairman  
of NEW-IG Board*

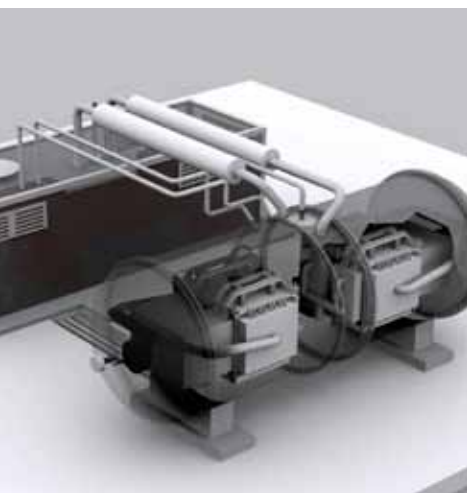




### 3. THE FCH JOINT UNDERTAKING



Courtesy of Acciona



Courtesy of Ansaldo

The challenge facing fuel cells and hydrogen technologies is of great complexity, requiring substantial investments and a high level of scientific, technological and industrial expertise. At the same time, their potential contribution to Community policies - in particular energy, environment, transport and industrial competitiveness - is very important.

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 vision for 2050 towards decarbonisation.

In May 2003, the Hydrogen and Fuel Cell High Level Group presented its vision report, "Hydrogen Energy and Fuel Cells – A Vision of Our Future". In this, the formation of a hydrogen and fuel cell public-private partnership was recommended in order to substantially accelerate the development and market introduction of these technologies.

In December 2003, the European Commission facilitated the creation of a European Hydrogen and Fuel Cell Technology Platform (HFP), bringing together all interested stakeholders. In March 2005, the HFP published a Strategic Research Agenda and Deployment Strategy, followed by an Implementation Plan in January 2007 – a comprehensive, long-term road map for Europe. This process confirmed that a coherent, long-term approach at EU level is essential for achieving critical mass in terms of scale, excellence and potential for innovation. The Commission's proposal for a long-term public-private partnership in the 7th Framework Programme of the European Community in the form of a Joint Technology Initiative (JTI) on Fuel Cells and Hydrogen was a consequential step to address the challenge. In practical terms, this JTI was set up as a Joint Undertaking.

The Call launched in 2008 was the first of the six to be implemented until 2030.



## 4. THE FCH JU'S COMMITMENTS

The ultimate 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, 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 Member States and Associated Countries participating in the 7th Framework Programme (FP7) in order 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 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. FUEL CELLS & HYDROGEN IN NUMBERS

**>1€ billion**  
**FCH JU budget**  
2008-2017

**2-5 years**  
**Expected reduction**  
of time-to-market of FCH  
technologies due to the FCH JU

**20% ...**  
...cut in emissions  
...improvement in energy efficiency  
...increase in renewables  
**by 2020**  
European Union's  
sustainability targets

**5%\***  
Estimated % of new cars fuelled  
by zero-carbon hydrogen in 2020

**15\***  
Estimated million tonnes of  
avoided per year in CO<sub>2</sub> in 2020

**35%\***  
Same estimation for 2040

**240\***  
Estimated million tonnes of  
avoided per year in CO<sub>2</sub> in 2040

**\***  
"Hydrogen Energy and Fuel Cells – A Vision  
of Our Future" by the Fuel Cell High Level  
Group (2003)

### Estimated distribution of funds by application area

Transportation & Refueling Infrastructure	32-36%
Hydrogen Production & Distribution	10-12%
Stationary Power Generation & CHP	34-37%
Early Market	12-14%
Cross-cutting Issues	6-8%

### Estimated distribution of funds by year

2008	28.1M€
2009	73.0M€
2010	90.1M€
2011	106.8M€
2012	73.8M€
2013	80.9M€



## 6. REVIEW 2009

2009 Objectives	Actions	Status
<b>Programme Office / Calls</b>		
2008 Call evaluated	Special webinar session on 1st Call, including presentation of statistics	✓
2009 Call published on time	Call open in June 2009 as predicted by PO - Secretariat organised information webinar with the participation of Call experts	✓
Initiate and advance Programme Office recruitment well underway	Calls for candidates were open for all PO positions. NEW-IG Board members actively involved in selection process	✓
Submit target-setting proposal	Developed proposal to be implemented in 2010	✓
<b>Finance</b>		
Improve Grouping's financial control and reporting	Corrections of inaccuracies in books completed – full control of bank accounts finalised	✓
Improve Grouping's Secretariat	FD Blueprint chosen to run new Secretariat after rigorous selection process which included 5 consultancies	✓
Recover FCH Grant	FCH Instruct Grant fully recovered and books closed	✓
Rigorously follow-up of bad debts/overdue fees	Personal and persistent follow-up by Board members and Secretariat. Bad debts 2008/2009 have been reduced from 251.825€ to 122.250€.	✓
Reduce fixed membership fees	Reduction introduced together with the implementation of annual and multi-annual membership	✓
Introduce project-fee in Call 2009	IG and RG agree on project-fee – Call 2009 to already include it	✓
Achieve VAT recovery	VAT return of 90% accepted by Belgian authorities	✓
<b>Membership and communications</b>		
Introduce annual and multi-annual membership	Members adopted new membership types following recommendations by Taskforce, incorporated in bylaws-implementation in invoices 2009	✓
Improve internal communication	Introduction of an improved and more complete newsletter which increased to 10 issues a year – launch of weekly media monitoring reports	✓
Implement communication plan (internal and external)	Plan implementation still ongoing (waiting for appointment of PO's Communications & Policy officer). Several communications activities implemented such as events (1st FCH Stakeholders Dinner, Drive N' Ride at SGA, COP15 H <sub>2</sub> Parade) and production of materials (brochure, stand)	✓
Implement "supportership" category	New membership option was launched at SGA 2009	✓
<b>Bylaws</b>		
Revise bylaws	Taskforce led by (now ex-) Board member Jonathan Lewis (Rolls-Royce) made recommendations to members which were approved at the GA of 3 July	✓
Revise elections procedure	New bylaws taskforce appointed at the end of 2009 to deal with changes not tackled during the previous revision	✓



## 7. TARGETS 2010



Courtesy of NUCELSYS



Courtesy of HLogic

### Programme Office/Calls

- Improve appeal of Call 2010 and anticipate opening date
- Anticipate Call 2011 Committee kick-off discussions
- Work with JTI Governing Board to change the funding rules - current funding-rules stretch funding capacity; strive for improved framework for calls 2010 and 2011
- Coordinate preparation of mid-term review 2011 with JTI-PO
- Support autonomy of JTI-PO

### Finance

- Finalise agreement with VAT office

### Communications

- Develop strategic external communications plan
- Re-vamp website, making it more appealing to visitors and user-friendly
- Ensure FCH is part of long-term EU planning (SET-plan, EU Transport Strategy, EU Energy Strategy, TEN-T, funding mechanisms)
- Build relations with EU political and other stakeholders

- Start thinking about period beyond FCH JU (2014+)
- Improve SGA based on feedback from previous years

### Bylaws

- Finalise and implement second round of bylaws changes

### Membership

- Increase number of members and supporters

### Commercialisation

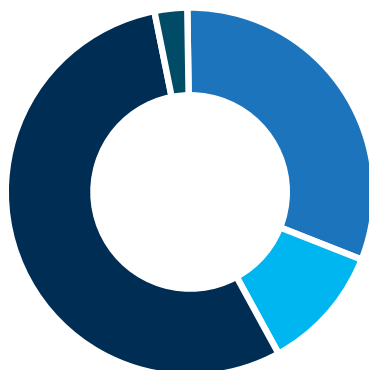
- Develop application-oriented commercialisation roadmaps to manage the transition from the current "Research, Development & Demonstration" phase to the first commercial start



## 8. CALLS & FUNDS

### Budget breakdown

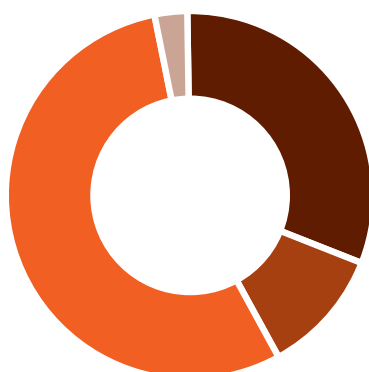
(Total requested grant = 68,4M€)



- 32% Research
- 20% Universities
- 45% Industry
- 3% Others

### Participant organisation type

(Number of participants = 243)



- 30% Research
- 23% Universities
- 43% Industry
- 4% Others

### 8.1 Call 2008

During the Governing Board of 15 May, the Programme Office released for the first time data on the Call 2008. This Call, the first launched by the FCH JU, was open between 8 October 2008 and 15 January 2009 and had a total budget of 28.1M€. Division of budget by topics was as follows:

- Transportation & Refuelling Infrastructure: 8.9M€
- Hydrogen Production & Distribution: 2.9M€
- Stationary Power Generation & CHP: 12M€
- Early Markets: 2.6M€
- Cross Cutting Issues: 1.7M€

All 32 proposals received were eligible and in total involved 243 partners: 43% from Industry, 30% from Research institutes and 23% from Universities. The proposals were then evaluated by a panel of 19 experts and between 30 January

and 20 February several individual and consortia meetings were held. In the end, 18 proposals passed to the negotiation phase, requesting a total of 39.64M€.

The outcome of this phase, closed in December 2009, was the award of 61.768,807€ to 16 proposals. This funding will be divided between the Commission and Industry by 27.221,604€ and 23.067,113€ respectively, creating a funding gap of 4.154,491€.

One of the most important observations to take from this first Call was that almost half of the proposals were not above the threshold and that five of the topics were uncovered (+2 topics in the Cross-Cutting AA, not covered already at the submission phase). The Board is working together with the PO and the Research Grouping to tackle these issues in the upcoming Calls.

#### The 16 projects awarded funds were:

##### Transportation & Refuelling Infrastructure

- H<sub>2</sub> Moves Scandinavia (Demonstration of hydrogen fuelled road vehicles and refuelling infrastructure)
- NextHyLights (Preparation for large-scale vehicle demonstrations in Europe)
- Auto-Stack (European fuel cell stack cluster)

##### Hydrogen Production & Distribution

- NEXPEL (Efficient PEM electrolyzers)
- PrimoLyzer (Efficient PEM electrolyzers)
- HYDROSOL-3D (Water decomposition with solar heat sources)

##### Stationary Power Generation & CHP

- GENIUS (Operation diagnostics and control for stationary applications)

- ASSENT (Component and system improvement for stationary applications)
- DEMMEA
- KEEPEMALIVE
- LOLIPEM (Degradation and lifetime fundamentals)
- MCFC-CONTEX
- ROBANODE

##### Early Markets

- IRAFC
- ISH2SUP (Fuel supply technology for portable and micro Fuel Cells)

##### Cross Cutting Issues

- Prepar-H2 (Planning of socio-economic activities)





Courtesy of Air Products



Courtesy of Opel

## 8.2 Call 2009

An important milestone for the Industry Grouping always coincides with the opening of the yearly Call for proposals. In 2009 this happened on 2 July and extended until 15 October.

The NEW-IG triggered several activities ahead and during the Call in order to facilitate members' access to it and the development of a successful proposal. Together with the RG, a brokerage event was organised for over 100 participants in Cologne (see "Stakeholder Outreach"). The Secretariat also prepared an information webinar where Call experts from the PO were invited to give a presentation on the learnings from the Call, 2008 focusing on best practices and most common mistakes. Based on this, the Secretariat developed a special newsletter article entitled "Does and Don'ts when answering a Call".

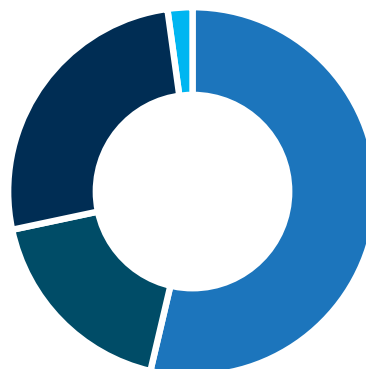
Together with the Programme Office, a press release was also distributed to the trade press and general European media announcing the opening of the Call.



By end 2009 the PO made available some preliminary data of this second Call. A total of 50 consortiums submitted proposals and the Industry remains the largest organisational type with 48% of projects:

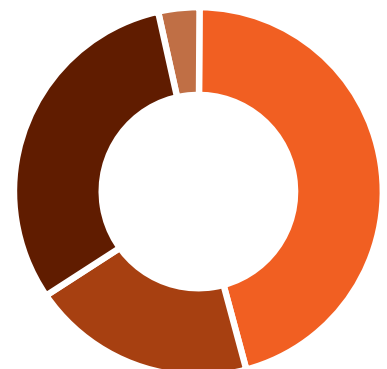
Area	Budget available M€	# Received Proposals	Requested Grant M€
Transportation & Refueling Infrastructure	26,4	7	43,9
Hydrogen Production & Distribution	5,7	7	13,5
Stationary Power Generation & CHP	25,9	21	46,5
Early Markets	10,3	7	21,3
Cross Cutting Issues	3	8	4,9
<b>TOTAL</b>	<b>71,3</b>	<b>50</b>	<b>130,1</b>

**Budget breakdown**  
(Total requested grant = 130.1 M€)



- 60% Industry
- 16% University
- 22% Research
- 2% Others

**Participant organisation type**  
(Number of participants = 243)



- 48% Industry
- 19% University
- 28% Research
- 5% Others





Courtesy of NEDSTACK

### 8.3 AIP/Call 2010

One of the objectives set by the Board for 2010 is to anticipate the release of the 2010 Call. With this in mind, already at the end of 2009 the four new IG Committees invited their RG counterparts for several discussion rounds. The objectives was to submit as soon as possible suggestions for topics for the AIP 2010. These meetings kicked-off in September and the four initial drafts were submitted to the Programme Office in early 2010.

- If it appeared that a rethinking of the regulation was needed, the group was to prepare an issue paper, with a list of options (pros and cons), with a view to minimising the political risks linked with the regulation review process.

The need to find a solution to the problem of funding rules was also acknowledged by Commissioner Potočník in September 2009. In his address to the FCH JU Stakeholders General Assembly in October 2009, the Commissioner further recognised that the FCH JU was “a prototype” and that improvements should be implemented as necessary in collaboration with all the members.

### 8.4 Improving matching

The Call 2008 resulted in funding levels significantly lower than expected and not aligned with those of FP7. The FCH JU recognise the need to investigate the reasons why such low levels of real funding rates were produced for the Call.

Following a number of meetings held since the availability of results for the first Call for Proposals, the group produced a report at its meeting of November stating that it was indeed impossible to improve the matching issue without a change in the Regulation. Already in 2010 the group produced a document listing four different options which will be discussed among the JU Partners.

In a meeting on 23 June 2009 between the FCH JU Governing Board Chairman (Gijs Vriesman) and its Vice-Chairman (Zoran Stančič), it was decided that a working group composed of IG, RG and Commission representatives should be set up in order to deliberate on finding the best solution to the problem of low funding rates. This working group received a double mandate:

- Analyse whether the matching issue can be solved without a change to the current FCH JU regulation.



Courtesy of Wärtsilä



## 9. MEMBERSHIP AND PROJECT FEE DEVELOPMENTS

### 9.1 General Assemblies

#### 31 March

This meeting was held in Brussels and 38 members attended. Among other decisions, participants agreed to a new fee structure which would include a annual and multi-annual membership type. It was also at this GA that members took the decision to update the Grouping's bylaws to reflect the new fee structure and improve election procedures.

#### 3 July (Extraordinary)

This Extraordinary GA marked the beginning of a new type of NEW-IG meetings: members had the option of attending in person or via webinar. This technology permits real-time presentations and anonymous voting. 38 members were represented at the meeting and important decisions included the approval of the changes recommended by the Bylaws Taskforce and requested by the March GA.

#### 28 October

The last GA of the year was held the day after the SGA at the Charlemagne Building in Brussels and 29 member companies were represented. During this GA, Jonathan Lewis (Rolls-Royce Fuel Cells) stepped down as Board member and Lucio Gallo (Ansaldo) was elected in his place. It was also during this

meeting that members decided to initiate a second series of bylaws changes to cover issues not tackled during the first round on changes.

### 9.2 Annual and multi-annual membership

Following the adoption of the revised bylaws, a new membership structure was put in place. During a window of choice, all members could decide between an annual Membership or a Multi-annual Membership (for a fixed period of 3 years and with a discounted fee). The time window was set by the Board from 8 July 2009 to 7 August 2009 (4 weeks) and at the end of it, 18 companies decided to make the long-term commitment, 30% of the NEW-IG membership at the time.

This operation also involved a complete update of the Groupings' membership database.

### 9.3 Four size categories

At the members' request, and to make the membership fees as fair as possible, the new bylaws also introduced different size membership categories, which until then had only been divided into large/medium and small/micro. The IG Board also decided

on the new values which will not be altered until 2013:

Company size	Annual fee
Micro	4.000
Small	6.000
Medium	9.000
Large	16.000

For all purposes of the NEW-IG membership, company sizes are defined according to the EU Law. More details here:

[http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index\\_en.htm](http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/index_en.htm)

### 9.4 Introducing the “supportership”

Also a decision from the 31 March General Assembly, the NEW-IG officially introduced a new membership category at the SGA 2009. It targets organisations that have a clear interest in the fuel cells and hydrogen technology, but which cannot or do not wish to participate in the Calls.





Courtesy of Riversimple

Although not enjoying the privileges of a full membership, supporters will still be able to:

- Access the Grouping's extensive data, which provides valuable insight into what is happening in the hydrogen and fuel cell industry and market including access to selected documents on a special supporter's area on the NEW-IG website
- Participate in the General Assembly as an observer
- Participate in the Committees as an observer

It was also agreed at the March GA that the supportership option would be evaluated by the Board and members during 2010.

### 9.5 Project fee

The EC Regulation setting up the Fuel Cells and Hydrogen Undertaking states that the Community and the Industry and Research Grouping together cover equally the running costs of the FCH JU. The Industry Grouping and Research Grouping together are obliged to pay 50% of the running costs of the Project Office.

The membership fees of the Research and Industry-Groupings do not suffice to pay these costs in full, so agreed that the fairest way to cover these running costs is to share them amongst the actual beneficiaries of the Calls. Therefore, the Industry and the Research Grouping, with the support of their members and the

European Commission, adopted the concept of a project fee during 2009. This project fee is applicable to every organisation applying for funding, including non-members of the Groupings.

The project fee level is set as a percentage of the total amount of grants received and the amount is established each year by the Industry and Research Groupings' Boards. The value agreed for the Call 2009 was 4%.

The introduction of the project fee involved not only the formation of a Bylaws Taskforce, but also coordination with the Research Grouping, legal counselling, PO and European Commission. Several information emails and letters were also sent to members and Consortium leaders through 2009.



## 10. STAKEHOLDER OUTREACH

### 10.1 Events

#### 10.1.1 First FCH Stakeholders Dinner

During the night of 26 October, the NEW-IG held the 1st FCH Stakeholders Dinner, kindly sponsored by NEW-IG members Linde, Nedstack, Total and Shell. Around 70 guests were present, among them the delegation from the United States' Department of Energy, a high representative from the Danish Energy Agency and the Deputy-Head of the Commission's Clean Transport & Urban Transport.

The Dinner also marked the official launch of the book "The Hydrogen Economy – Opportunities and Challenges", published by Cambridge University Press and edited by Michael Ball (Shell, The Netherlands) and Martin Wietschel (Fraunhofer Institute for Systems and Innovation Research, Germany). The book was also offered to SGA speakers and panelists.

#### 10.1.2 Drive N' Ride

Also in parallel to the SGA, several FCH vehicles were being tested in Brussels by key officials from the European Institutions, national representations, NGOs, think-tanks and energy companies. At the end of two and a half days, 50 guests had taken a test drive. This event also included a shuttle service for SGA speakers and panellist.

While half of the cars were doing their test-drive rounds, the remainder were parked in front of the Berlaymont Building, Head-Quarters of the European Commission. Representatives from the car companies were close to the cars answering the many questions of passers-by.

A total of six cars came to Brussels two from each participating car manufacturer: Daimler, Honda and Opel. The models available were the Honda FCX Clarity, the Mercedes-Benz B-Class F-CELL and the Opel HydroGen 4.

#### 10.1.3 Brokerage Event

With over 100 attendees, the 1st FCH JU Brokerage Event was held in Cologne on 19 May, shortly after the opening of the Call 2009. The objective of the event was to bring together industry and research organisations interested in the answering the Call and explore possible consortiums.

Throughout several rounds, participants had the opportunity to get together in small groups discussing specific topics. This informal format aided not only networking, but also the chance for industry and research to discover mutual interests.

#### 10.1.4 H2 Parade at the COP15

The NEW-IG was part of the organisation of a Parade of 14 FCH vehicles which crossed the bridge between Malmö, Sweden and Copenhagen, Denmark, on 29 December.





H2 Parade crosses bridge towards  
Copenhagen

This event was held a few days ahead of the 15th Conference of the United Nations Framework Convention on Climate Change (COP15), the highly-mediatised event held to establish a continuation to the Kyoto Agreement.

The Parade started at the hydrogen refueling station in central Malmö and, after stopping at the recently-inaugurated Copenhagen refueling station, finished at the Danish Parliament. There, an Industry Update meeting was held, giving key players in the industry the opportunity to update stakeholders on their progress towards the commercialisation of hydrogen vehicles and infrastructure. Panellists included leaders of the automotive industry, Europe's major fuel and technology companies and representatives from significant hydrogen projects in Europe.

The following hydrogen cars featured in the Parade:

- Fiat Panda Fuel Cells and H2/CNG Mixture
- Honda FCX Clarity
- Mercedes Benz B-Class F-Cell and A-Class
- Opel HydroGen 4
- THINK Hydrogen

During the COP15, these vehicles were also used to shuttle delegates around Copenhagen.

#### 10.1.5 FCH JU's SGA 2009

Together with the Programme

Office and the Research Grouping, the NEW-IG co-organised the FCH JU Stakeholders General Assembly 2009, held in Brussels on 26-27 October. 300 participants got together to discuss the present and future of the FCH sector. Throughout the two days, participants had the opportunity to network and directly exchange best-practices in Europe, Japan and the United States.

The SGA 2009 focused on evaluating the JU's first year and preparing the ground for the important years ahead. The event covered not only the progress of JTI itself but also the politics around a full-scale commercialisation of FCH applications.

## 10.2 Communications

### 10.2.1 Newsletters

The NEW-IG newsletter was the target of a major upgrade in 2009. The design was re-vamped and the type of content expanded to cover topics from internal news, reports on major political events and comments on interesting press converge. The frequency also increased and is now at 10 issues per year.



### 10.2.2 Media reports

The Secretariat introduced in 2009 a weekly media report sent to employees of member companies. This report, sent at the end of each week, aggregates the most significant FCH-related coverage from the past seven days across the globe. It includes a section on the blogosphere and covers news in English, French, Italian and Spanish.

### 10.2.3 Stand

The NEW-IG stand was produced to be used at the SGA, but can be displayed during other events. The objective was to create a space to show materials (brochures, newsletters, application forms) and become a “meeting-point” to welcome guests.

### 10.2.4 Brochure

The NEW-IG updated brochure was also produced to coincide with the SGA. It serves as an information document for stakeholders and potential members. In fact, a digital version of the brochure is an essential part of the NEW-IG Prospects and Welcoming Package.







## 11. THE BOARD AND SECRETARIAT

### 11.1 Changes in the Board

2009 saw two important changes to the NEW-IG Board.

At the March GA, Alberto Ravangi from SOFCPower was replaced by Jan Piet van der Meer, of Nedstack, who also took over the role of Treasurer. Jan Piet studied Law and Business Administration in the University of Leiden and Delft in the Netherlands. Before joining NedStack, his experience involved the business development of new services and technologies both in the ABN Bank and at Caméléon Beheer, a high-end producer of leather goods. Financial and budget management have always been a strong component of his career.

During the October GA, Jonathan Lewis from Rolls Royce Fuel Cells stepped down as Board member and was replaced by Lucio Gallo, CEO of Ansaldo Fuel Cells SpA. Before that he was the General Manager of Ansaldobreda SpA and the Executive and Senior Vice President – Cruise Line Fincantieri SpA. Academically, he has a Doctorate in Electrical Engineering and an MBA by the Milan Bocconi SDA University. Lucio also took over Jonathan's role as leader of the Stationary Committee and became the coordinator of second bylaws taskforce.

### 11.2 Strategic Workshop

Prompted by the market objectives of the NEW-IG, the Board got together on 15 July for a one-day Strategy Workshop. The objective was to begin to develop an aligned vision and strategic roadmap for commercialisation of FCH Technology (in commercial, political and operational terms) or more simply, to map-out 'The road to commercialisation'.

Two practical sessions were held. The first one gave the Board an external perspective on how FCH technologies are seen by the outside world and the second, an intensive working session, focused on past actions and next steps towards market acceptance. For the first session, three external speakers were invited to speak to the Board: Dr. Meloria Meschi – Economist at FTI Consulting, Richard Hudson – CEO of publication Science | Business and Nuša Urbančič – Policy Officer at NGO Transport & Environment.





Courtesy of Hydrogenics

### 11.3 Changes in the Secretariat

On May 2009, FD Blueprint was selected by the Board to operate the NEW-IG Secretariat in Brussels. They are a leading Brussels-based public affairs and communications consultancy with extensive experience in working with trade associations. On 1 June they became responsible for the running of the Secretariat, including administration, membership services, finances and strategic advice. On a daily basis, the Secretariat is run by two senior consultants – Ilse van Harteveldt and Alexandra Reis, supported by the wider team of experts within FD Blueprint.

Ilse van Harteveldt is the Board's strategic advisor on marketing, policy and strategy, counsellor to members and driver of the NEW-IG support team. Her work focuses on building and maintaining external relationships with institutional (both EU and national) and other key stakeholders.

Alexandra Reis is the members' daily point of contact and ensures the smooth day-to-day running of the organisation, including planning and logistics of meetings, membership administration, internal and web communications and general operational activities.



## 12. COMMITTEE REPORTS

The NEW-IG is divided into four working 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.

### 12.1 Stationary Fuel Cells for Power and Heat Generation

#### Leader:

Jonathan Lewis (Rolls-Royce Fuel Cell Systems), until 28 October

Lucio Gallo (Ansaldo Fuel Cells), from 28 October

#### Meetings:

Date	Location
19.12.08	Conference Call
16.03.09	Conference Call
14.09.09	Conference Call
24.11.09	Brussels, Belgium

#### Members:

Acciona Biocombustibles, Adelan, Alstom Power, Ansaldo Fuel Cells, AVL, Ceramic Fuel Cells, Ceres Power, Dantherm Power, Diverse Energy, E.ON, EWE, GDF Suez, Hexis, HyGear, Ibredrola, Infracore, Intelligent Energy, MTU, Nedstack, NTDA Energia, Nuon, Roll Royce Fuel Cells, Saint Gobain, Sapio, Siemens, SOFCPower, Topsoe Fuel Cells, Vattenfall, Wartsila

### 12.2 Hydrogen production and Distribution

#### Leader:

Gijs Vriesman (Shell)

#### Meetings:

Date	Location
07.07.09	Conference Call
12.02.09	Conference Call
18.11.09	Brussels, Belgium

#### Members:

Acciona, Air Liquide, AirProducts, Environment Park, Gaz de France, Hydrogenics, HyGear, Hynergreen, LBST, Linde Gas, NTDA Energia, Sapio, Shell, Statoil, The CCS global group, Total, Vattenfall Europe AG





Courtesy of Air Liquide

## 12.3 Transportation and Refuelling Infrastructure

### Leader:

Peter Froeschle (Daimler AG)

### Meetings:

Date	Location
21.10.09	Conference Call
19.11.09	Nabern, Germany
10.12.09	Conference Call
24.11.09	Brussels, Belgium

### 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, Volkswagen, Volvo Technology, Wartsila

## 12.4 Early Markets

### Leader:

Herbert Wancura (NTDA Energia)

### Meetings:

Date	Location
	Conference Call
24.11.09	Conference Call

### Members:

Adelan, Air Liquide, BASF, H2Logic, Labor, Linde, Nedstack, NTDA Energia, SOFCPower, The CCS Global Group



## 13. FINANCIAL REPORT

All figures presented in this Annual Report have been audited by an independent party.

### 13.1 Results year end 2009

#### NEW-IG Profit and Loss Account 2009

	To 31/8/09	Sept-Dec	Full Year	Budget	Variance
Income	491.390	254.961	<b>746.351</b>	593.000	153.351
Extraordinary Income		65.070	<b>65.070</b>		
<b>Total Income</b>	<b>491.390</b>	<b>320.030</b>	<b>811.420</b>		
Total Costs	-329.023	-360.699	<b>-689.722</b>	-302.500	-387.2222
<b>Net NEW-IG Income (expenditure)</b>	<b>162.367</b>	<b>-40.669</b>	<b>121.698</b>		
Net FCHIncome/ (expenditure)	-235.912	-7.697	<b>-243.609</b>		
<b>Net Income/Expenditure per Accounts</b>	<b>-73.544</b>	<b>-48.367</b>	<b>-121.911</b>		

2009 showed a net result of 121.698€, however after consolidating with FCHInstruct, the year's final net result is -121.911€.

Financial achievements of 2009 were:

- Clean up of the NEW-IG accounting and correction of inaccuracies
- Catch up on recovery of overdue membership-fees 2008/2009
- Recovery of FCHInstruct Grant
- VAT return of 90% accepted

### 13.2 NEW-IG Balance Sheet 2009

	2008	2009
Fixed Assets	10.813	184
Deposits	14.100	7.714
Due from members	719.575	245.830
Allowance for Bad debts	-251.825	-122.255
Due From EC	173.919	0
Prepayments	6.158	0
VAT	117.996	181.699
Bank	436.346	504.462
Accrual		655
<b>Total assets</b>	<b>1.227.082</b>	<b>818.290</b>

	2008	2009
Suppliers	-106.581	-16.140
Provision PO		-196.000
Accruals	-5.441	-5.000
Deferred Income	-392.000	
VAT Net Accumulated reserves bfwd	-328.420	-723.060
For the year	-394.640	121.911
<b>Total liabilities</b>	<b>-1.227.082</b>	<b>-818.290</b>







## 14. 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:** Fuel Cells and Hydrogen
- **FCH JU:** Fuel Cells and Hydrogen Joint Undertaking - unique public-private partnership supporting research, technological development and demonstration of FCH technologies. One of the six JTIs
- **FCHInstruct:** Preparatory activities of the FCH Joint Technology Initiative
- **FP7:** Seventh Framework Programme for Research and Technological Development – an EU-led tool to promote Europe's technological competitiveness in strategic areas
- **GA:** General Assembly
- **IG:** Industry Grouping (aka NEW-IG) – one of the FCH JU's partners together with the EC and RG
- **JTI:** 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 (aka Industry Grouping, aka IG)
- **PO:** Programme Office – coordination office of the FCH JU
- **RG:** Research Grouping
- **RTD:** Technological development and demonstration
- **SGA:** Stakeholder General Assembly



[www.fchindustry-jti.eu](http://www.fchindustry-jti.eu)