

WORKSHOP DELOITTE – AdSP-MTS

STUDY ON HYDROGEN IN PORTS AND INDUSTRIAL COASTAL AREAS Developing comprehensive and relevant case studies

WEDNESDAY 24th of May 2023 @ 10:00 AM

Dear Stakeholder,

Deloitte, as one of the most relevant European consulting companies, and with extensive expertise in the energy sector and hydrogen economy, has been entrusted by the Clean Hydrogen Partnership with the development of a wide-range study regarding Hydrogen in Ports and Industrial Coastal Areas.

Who is Deloitte

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax, and related services. The energy transition and H₂ are core focus areas for us as a company, in which we have developed comprehensive expertise.

Why this study has been considered as necessary by the European Commission

The European Commission has identified hydrogen as a main energy vector that enables a zero-emission Europe. Today, less than 2% of Europe's energy consumption comes from hydrogen, yet it plays a key role in the integration of vast quantities of renewable energy into sectors which today are proving challenging to decarbonise. Europe, with its many ports, technological advancements and already initiated hydrogen policies, has the potential to be a starting point for the development of the global hydrogen economy. In light hereof, the Clean Hydrogen Partnership commissioned the study on Hydrogen in Ports and Industrial Coastal Areas.

Objectives of the study

The objectives of the study are twofold. Through this study, Deloitte wants to provide foresight in the market potential of hydrogen in ports and develop a clear roadmap to kick-start the hydrogen economy in ports and industrial coastal areas. Additionally, this study also aims to bring relevant stakeholders across the hydrogen value chain together, to collaboratively develop the hydrogen ecosystem and solve common issues hindering hydrogen adoption.

Scope of the study

The study examines hydrogen potential in the EU27, the UK and Norway (Europe). This, by focusing on hydrogen demand in transport, port activities, urban areas and industries, to be supplied through green hydrogen production, blue H₂ from existing grey H₂ production sites and imported green and blue H₂. The study builds on broad stakeholder representativity, to estimate hydrogen demand and supply, as well as develop potential business models for ports and policy recommendations.

Invitation to the workshop

We would like to invite you to the workshop Deloitte and the North Tyrrhenian Port Network Authority are jointly organizing, to share with you the key insights from our study, exchange knowledge on the usage of hydrogen in maritime and road transport, and develop an action plan to initiate hydrogen end-use in the Livorno region.

What Deloitte expects from stakeholders during the workshop?

We will share a pre-read of the preliminary case study for H₂ end-use in maritime and road transport we are executing. Can we ask you to please go through before the 24th of May and share your relevant hydrogen insights with us during the workshop.



WORKSHOP AGENDA

Moderator: Mr. Francescalberto DE BARI – Head of “Development, Innovation and European Programmes” unit – AdSP-MTS
Mr. Pieter SMEETS – Director Decarbonization Strategies – DELOITTE Belgium

PUBLIC PART (hybrid attendance – physical + streaming)

- 09:00 Welcome speech by the port authority’s President**
Dott. Luciano GUERRIERI – President of AdSP-MTS
- 09:10 Hydrogen in Tuscany: regional level policies & strategy for fostering hydrogen adoption in industrial processes**
Dott. Paolo TEDESCHI, Chief of Staff, Tuscany Region
- 09:25 Hydrogen for ports and logistics: port authority’s actions for lightening an hydrogen value chain**
Dott. Alessandro VIVIANI – Senior Consultant “Environment” – The European House – Ambrosetti SPA
- 09:40 Outcomes study on Hydrogen in ports**
Key insights from the study on Hydrogen in Ports and Industrial Coastal Areas
Mr. Pieter SMEETS - Director Decarbonization Strategies – Deloitte
Mr. Wouter GOOSSENAERTS - Consultant - Deloitte
- 10:10 Context and scope of the case study**
Context behind the development of the Livorno case study
Mr. Pieter SMEETS - Director Decarbonization Strategies - Deloitte
- 10:25 Preliminary financial analysis**
Findings from Deloitte’s financial analysis, assumptions used to build the business case
Mr. Wouter GOOSSENAERTS – Consultant - Deloitte
- 10:55 Conclusions of the workshop’s public part**
Dott. Francescalberto DE BARI – Head of “Development, Innovation and European Programmes” unit – AdSP-MTS
- 11:00 Coffee Break**

PRIVATE PART (physical attendance only)

- 11:15 Activity 1: Developing the ecosystem**
Identifying the stakeholders that need to be involved, and which roles they should take up to create economic, environmental and societal benefits
Mr. Pieter SMEETS - Director Decarbonization Strategies - Deloitte
Mr. Wouter GOOSSENAERTS - Consultant - Deloitte
- 11:45 Activity 2: Working together**
Defining the actions we need to take to create added value for all participants involved
Mr. Pieter SMEETS - Director Decarbonization Strategies - Deloitte
Mr. Wouter GOOSSENAERTS - Consultant - Deloitte
- 12:30 Wrap-up & Closing**
Discussing the key outcomes and next steps – Round Table with stakeholders
Mr. Pieter SMEETS - Director Decarbonization Strategies - Deloitte
- 13:00 Lunch**