H2-FCEV Commercialization

Facilitating collaboration, obtaining real world expertise, and developing new analysis tools

Project ID #

TRANSPORTATION EVENT

2014 DOE Hydrogen and Fuel Cells Program Review June 19, 2014

Bill Elrick, California Fuel Cell Partnership Operated by Bevilacqua Knight, Inc.



This presentation does not contain any proprietary, confidential, or otherwise restricted information

Overview

<u>Timeline</u>

- Start: January 1, 2012
- End: December 31, 2016
- 50% complete

<u>Budget</u>

Total project funding

- DOE share: \$267.5K
- Contractor share: \$2.42M
- Funding received in FY13:
 - \$267.5K
- Funding for FY14:
 - \$267.5K (anticipated)

Barriers

- Limited collaboration & communication across market segments & stakeholders
- Limited conventional fuel provider awareness & participation
- Low consumer confidence in early market H2 infrastructure
- Lack of cohesive, comprehensive national ER training guidance

Partners

- See partner slide
 - Industry, policy, and scientific input and expertise
 - Financial cost share
- Project lead: Bill Elrick

Partners (CaFCP members)

Hyundai

Air Liquide Air Products Alameda-Contra Costa Transit District (AC Transit) Automotive Fuel Cell Cooperation **Ballard Power Systems** Bay Area Air Quality Management District California Air Resources Board California Department of Food and Agriculture California Energy Commission California State University - Los Angeles CALSTART The Center for Energy Efficiency and Renewable Technologies (CEERT) Center for Transportation and Environment (CTE) Chrysler Daimler **Energy Independence Now General Motors** Honda **Hydrogenics**

Institute of Transportation Studies, UC Davis **ITM Power** Linde North America, Inc. National Fuel Cell Research Center, UC Irvine National Renewable Energy Laboratory (NREL) Nissan Powertech Labs Proton OnSite Sandia National Laboratories South Coast Air Quality Management District Southern California Gas Company SunLine Transit Agency Toyota U.S. Department of Energy U.S. Environmental Protection Agency **US Hybrid** University of California, Berkeley Volkswagen

Objectives - Relevance

Barriers	Objectives
Limited collaboration & communication across market segments and stakeholders	• Track, synthesize, and analyze latest H2 infrastructure progress and challenges, developing useful reports
	• Conduct regular stakeholder meetings to present and discuss challenges and progress in a collaborative manner
Limited conventional fuel provider awareness and participation	 Conduct education and outreach directly to conventional fuel providers via existing networks
	 Increase participation in H2-FCEV industry funding opportunities and activities
Low consumer confidence in early market H2 infrastructure	• Expand Station Operational System Status (SOSS) to a more capable platform to increase usability and early customer confidence
	 Include additional H2 stations as they come online
Lack of cohesive, comprehensive national emergency response (ER) training guidance	• Complete a stakeholder-approved National ER template to be used as guidance among DOE and other ER activities
	• Complete "train-the-trainer" outreach to successfully initiate the national ER template

Approach - Strategy

As a public/private stakeholder group, our approach is to leverage active participation and commitment from all sectors to advance H2-FCEV commercialization

- Collaboration and communication tools
 - Develop H2 progress reports on CaFCP and stakeholder activities to facilitate transparent communication on progress and challenges
 - Develop and update Station Profiles for all CA H2 stations to collect relevant details, real world experience and lessons learned
- Directly engage conventional fuel providers
 - » Conduct H2-FCEV education and outreach
 - Increase conventional fuel provider participation in H2-FCV station development, solicitations and industry activities

Approach - Strategy, continued...

As a public/private stakeholder group, our approach is to leverage active participation and commitment from all sectors to advance H2-FCEV commercialization

- Increase consumer confidence and FCEV usability
 - Expand SOSS to become more capable and user-friendly
 - Include new H2 stations as they come online
- Establish a harmonious national ER program
 - » Develop a stakeholder-based national ER outline
 - » Complete "train-the-trainer" outreach to initiate program

Accomplishments and progress

Collaboration and communication

- Developed 12 monthly H2 progress reports
- Updated Station Profiles during CaFCP Working Group meetings (Sep and Dec 2013, Mar and May 2014) http://cafcp.org/sites/files/20140211_H2-Station-profiles.pdf
- Integrated Station Profiles, Station Report Cards and other reports into a new H2 Station Smartsheet, used by GO-Biz ZEV Infrastructure Project Manager to track progress of all state funded H2 stations development
- Facilitated extensive discussions within CaFCP meetings and among industry stakeholders on CA funding programs, station development, implementation progress, challenges and needs.

CaFCP monthly project reports

Q2 Status as of 03/31/14

ational ER Program (Project n full implementation of nat	t lead: Jennifer Hamilton) tional ER template into existing pr	ograms, with inclusion into pr	imary ER tra	ining stakeholde	rs (e.g. NFPA and I	NAFTC). Fo	ollowing c	ompletion	of templat	e begin "Tra	in the trai	ner" hando	off	
expanded outreach. Project Name	Task Name	Milestone	Due Date	Status	Deliveral	ble	Due	Date	Status		Commen	ts		
_	Develop the national ER program	submit material to NFPA		Completed	NPFA to implemen material		6/30		rogress	Gave NFPA material from CaFCP and DOE for updating the online training program to include H2 a FC's- NFPA will also be a user of				
	Project Name	Task Name	IV	lilestone	Due Date S	Status	Deliverable			Due Date	State	us	Comm	ents
E	2c Integrate Hydrogen Into Existing Expand existing fuel retailer outrea SIGMA, Fuels Institute). Continue (c	ch activities by becoming offici	al members		ry groups (Fuels In:	stitute/NA	.Cs, CIOM/	A, WPMA) (and active	participation	/exhibits i	n previous :	and new even	ts (WPMA, POC,
lop and implement natio am	_	Update H2 station materials					Update fa	ct sheets		2/14/14	Complete	ed l	A station prof added to outre	
	Ī	Project Name		Task Name	Mileston		Due Date	Status		Deliverable	2	Due Date	Status	Comments
	Conduct outreach campaigns to f retailers	2d Station Hardware Implemental Identify and address key barriers (innovative methods of building de	and prepare r	ecommendations t	o improve timeline t	to 68 statio	ns. Increas	e participati	on in natior	al hydrogen i	nfrastructu	re groups (D	OE HDTT and H	
			Bring all n SOSS	ew stations on to	Bring Emeryville online	reliably	3/31/14	In Progress	All new	stations on S	oss	12/31/14	In Progress	Waiting for confirmation for Linde if Emeryville require: changes. In communicatio Linde and APCI for bringing stations onto SOSS as they online. Troubleshooting ex stations continues (NB, OC
		Hydrogen station tracking and reporting	Migrate S platform	Migrate SOSS to a new platform		olution ansfer	4/30/14	In Progress	soss v	SOSS V2.0		6/30/14	Not started	Met with Wenger Engineer their solution.
			Develop g stations	o-to resource on H	12				Update	d Station Prof	iles	2/14/14	In Progress	Finalized CSULA for WPMA Feb 2014).
				tation tracking m (high level)					Update	d Station Rep	ort Card	4/15/14	In Progress	Updated 3/26 as per memi feedback. Tech Team discu needed on how to use in conjunction w/Tyson's Sma document.
		Revise 2012 Roadmap based on changed California context	Develop a Progress F	nd write Roadmap Report	Draft for WG rev Draft for ST review/approval		3/12/14 4/15/14	Completed Completed		ed document		5/31/14		Draft reviewed at WG Mari 13. Feedback from breakou discussion included in docu
				nplementation of 12 stations	Estimate budget	needs	3/1/14	Completed	HVAS n	ozzle develop	ed	12/31/14	In Progress	Based on input WEH & Thii project budget proposal wi submitted to Toyota. Toyo discussing internally and w other OEMs path forward.
		Support mechanisms to generate	equipmen workshop	OE with H2 statior It reduction efforts s and FOAs	Workshon "H2		2/26/14	Completed	Meetin	g reports		12/31/14	In Progress	Workshop occured Feb 24- moderated break out sessi Expected completion work report before DOE AMR.

Updated station profiles

Hydrogen Fueling Station Emeryville - AC Transit February 2014

Station Information

Address: 1172 45th St. Emeryville, CA 94608 Station Status: Open to public Hours of Operation: 24/7 **PIN Required: Yes** Fuel Pressures: 5,000/10,000 psi Supply Capacity: 65 kg/day (electrolyzer) Fuels: Up to 20 cars/day Fuel Price: Contract Operations Contact: AC Transit 1600 Franklin Street, Oakland, CA 94612 Market: Cluster - Berkeley Open to Public: April 2012

- Hydrogen Source/Storage: Proton OnSite electrolyzer using 100%. newable solar-powered electricity oduces 65 kg/day of hydrogen for er veh Liquid hydrogen storage is provided as a backup to the electrolyzer
- Dispenser: Linde
 Nozzle: WEH

 Designed by: Linde North America, Jacobs and EPC Constructed by: W.L. Butler Constructi Installed by: 510 kW DC solar pho m installed by engineering and truction firm Cupertino Electric Maintained by: Linde

Station Contact

Douglas Byrne AC Transit 10626 International Blvd. Oakland CA 94603 510-577-8821 dbyrne@actransit.org



Funding/Financing Total: \$9.2 million for transit and public fueling

Project Manager, ZEB Demonstration Program Govt: Total grants: \$6.7 million (7/12 Staff Report - ARB and FTA) ARB - \$2.7 million grant (public FCEV fueling) Public funding period: Three years

Other Station Details

 Land Owner: AC Transit · Gate over dispenser opens with the swipe of a fueling card · PIN is required after swiping fueling card at the dispenser to authorize fueling · Fueling agreement with AC Transit required



















Station profiles for all 10 public hydrogen stations open in California

H2 station *Smartsheet*

H2	Station	Develo	pment	Status
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	lag for bllow up		Permit Status	Station & Task Name	Who has the ball?	Projected Capacity (kg/day)	Stn. Developer/Operator	Funding Source/Year	Address	Start Date	Expected Operational Date	Progress Status	Pie Visual	
1	F			Constructed Stations						04/01/06	11/06/14			
2	F		۹	🗄 Burbank - West Verdugo			Hydrogen Frontier	DOE 2008	145 W. Verdugo Ave.	07/02/13	11/06/14	Selected for Upgrade	•	
8			•	Emeryville - AC Transit			AC Transit/Linde	2008 - ARB	1172 45th St.	04/01/12	04/01/12		۲	
9			0	Fountain Valley - OCSD			APCI	2008 - ARB	10844 Ellis Ave.	04/01/11	04/01/11		0	
0	F		•	Los Angeles - Harbor City			APCI	2009 - ARB	25800 S. Western Ave.	04/01/13	04/01/13		•	
1			•	Irvine - UCI			APCI	DOE/SCAQM 2007	19172 Jamboree Rd.		2007 (3rd gen.)		•	
2			•	Newport Beach - Jamboree			Shell	2008 - ARB	1600 Jamboree Rd.	04/01/12	04/01/12		۲	
3	F		•	Thousand Palms - Sunline Transit			Sunline Transit	multiple	32-505 Harry Oliver Trail	04/01/06	04/01/08		۰	
4	1		•	Torrance - W. 190th St.			Shell		2051 W. 190th Street	04/01/11	04/01/11		•	
5	1		9	Los Angeles - West LA 1			Shell	private	11576 Santa Monica Blvd.	04/01/08	04/01/08		•	
8	F	04/22/14	•	+ Los Angeles - Beverly Blvd.	Station Developer	180	Air Products	2010 - CEC	7751 Beverly Blvd., Los Angeles	06/02/10	10/01/14	Permit - Pre-Submittal	٠	Working with design before
8		05/06/14	•	Diamond Bar - SCAQMD	Station Developer	180	Air Products	2010 - CEC	21865 E. Copley Drive	06/02/10	06/13/14	Construction	•	Under constru
в	F	04/22/14	•	+ Irvine - UCI (upgrade)	Station Developer	180	Air Products	2010 - CEC	19172 Jamboree Rd.	06/02/10	10/31/14	Station Design - drawings	٠	Drawings con permitting
9		05/06/14	•	+ Los Angeles - West LA 2	City/County	180	Air Products	2010 - CEC	11261 Santa Monica Blvd.	06/02/10	08/01/14	Permit - Submittal	•	Approved by LAFD and cit construction structural pla
5		04/28/14	•	+ San Juan Capistrano - Junipero Serra	City/County	350	Linde	2010 - CEC	26572 Junipero Serra Rd.	08/02/10	11/30/14	Permit - Submittal	٠	OCFA gave of application i
5		05/16/14	•	+ West Sacramento - S. River Rd.	City/County	350	Linde	2010 - CEC	1515 S. River Rd.	06/02/10	09/30/14	Final Submittal	٠	City is okay v signature to
7		04/22/14	•	+ Mission Viejo - Marguerite Pkwy	Station Developer	180	Air Products	2012 - CEC	25122 Marguerite Pkwy.	11/18/13	10/01/14	Pre-Submital Meeting	٠	Met with City application e
7		04/22/14	•	+ Los Angeles - Woodland Hills	Station Developer	180	Air Products	2012 - CEC	5314 Topanga Canyon	08/28/13	10/01/14	Pre-Submittal meeting	•	Plan to subm
9		05/05/14	•	∓ Anaheim - E. La Palma	Station Developer	100	Air Liquide	2012 - CEC	3731 E. La Palma	01/06/14	09/30/14	Design, Pre-Submittal	•	Working arou NFPA, workin interpretation
7		05/08/14	•	Cupertino - Stevens Creek Blvd	Station Developer	350	Linde	2012 - CEC	21530 Stevens Creek Blvd.	06/30/15	06/30/15	Site Agreement	0	Station owne
8		05/08/14	•		Station Developer	350	Linde	2012 - CEC	390 Foster City Blvd.	12/31/13	06/30/15	Pre-Submittal Meeting		Station owne
8		05/06/14	•	• Mountain View - Leong Dr.	Station Developer	350	Linde	2012 - CEC	830 Leong Drive	12/01/13	06/30/15	Pre-Submittal meeting	0	Successful W
8		05/06/14	0	Chino - East End Ave.	City/County	100	H2 Frontier	2012 - CEC	12600 East End Ave.	01/01/14	08/04/14	Permit - Submittal	•	On track
7		04/07/14	•	Los Angeles - CSULA	Station Developer	60	EPC	2008 - ARB	5151 State University Dr.	03/01/08	05/07/14	Open	•	Pressure testi Grand Openi

Accomplishments and progress, continued.

Conventional fuel provider engagement

- Developed new "Stations" micro-site for fuel retailer/marketer community <u>http://cafcp.org/toolkits/stations</u>
- Exhibited at Western Petroleum Marketers Association Conference (WMPA), Feb 2014
- Presented on CA FCEV and H2 infra progress, exhibited, and conducted FCEV ride-n-drive at SIGMA Spring Conference, Apr 2014
- Exhibited at Pacific Oil Conference (POC), Sep 2013
- Presented on CA FCEV and H2 infra progress at NACS/Fuels Institute (FI), Apr 2014. FI ran pro-H2 article in their Aug 2014 newsletter.
- Conducted one-on-one H2 and FCEV educational meetings with ~25 regional fuel retailers and marketers
- Facilitated stakeholder response to CA H2 infra funding through industry outreach and discussions; with 10 different companies submitting responses for 61 different station applications (versus 4 companies submitting 9 station applications in previous solicitation)

CaFCP "Stations" micro-site

California Minister	DRIVING FOR THE FUTO	URE				f •• You	Search the site	Q	
CARS AND BUSES	STATIONS	STATIONS MAPS GOOD FO			PARTNERS	GETINVOLV	ED AB	outus	
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Emeryville - A0 Station Status: Open 1172 45th St Emeryvile, CA 94608		info >		Los Angeles -	Beverly Blvd Cal State LA West LA 2 Westwood Woodland Hills			Humer St. Ed. A	.e. 1
				Mountain Viev Oakland Oakland - AC Ontario Orange Pacific Palisa Palo Alto Redondo Bea Redwood City Riverside Rohnert Park San Diego San Jose	Transit des ch - Beryl St			Cou	

on Details

heim - E. La Palma

E. La Palma neim, CA 92806

ion Status: In Development mission Date: October 30, 2014





The funding process is a competitive grant that is scored on multiple criteria. Historically, the hydrogen equipment providers have been the lead on project proposals and they have partnered with dealers/operators who are interested in adding alternative fuels to their existing stations. CEC have provided both capital and O&M funding support.

If you are interested in applying for hydrogen station funding, please contact Joe Gagliano.

Hydrogen as a Fuel—Fast Facts

1. Hydrogen is produced by separating the hydrogen molecule from something else. Most hydrogen today is made from natural gas. Hydrogen can also be made from water and biogas.



2. Stations can produce hydrogen on site or have H2 delivered as a compressed gas or as a liquid

- 3. Hydrogen fuel is dispensed into vehicles as a compressed gas at 5,000 psi (called H35) or 10,000 psi (called H70.)
- 4. Major automakers are bringing fuel cell vehicles to California markets beginning in about 2015. These are new vehicles, not converted cars and SUVs.
- http://cafcp.org/carsandbuses/makesandmodels
- 5. Filling an FCV with compressed hydrogen takes less than 10 minutes. The vehicle range is similar to that of a combustion vehicle; 250-400 miles.



6. Hydrogen is dispensed by the kilogram. One kilogram of hydrogen has energy equivalent to one gallon of gasoline. Because FCVs are 2-3 times as efficient as a gasoline vehicle, they do not need as much fuel.

Resources

What Do You Need to Know About Hydrogen and Fuel Cell Electric Vehicles?

What Do You Need to Know About Hydrogen Stations?

What Do You Need to Know About Hydrogen Fueling Operations?

What Do You Need to Know About Hydrogen Station Economics?

What Do You Need to Know About the Local Government?

Hydrogen Station Profiles

2013-2014 Investment Plan for the Alternative and Renewable Fuel and Vehicle Technology Program

CEC Funding

Hydrogen Network Investment Plan

Fuel provider engagement





CONFERENCE ABOUT

Q. Keyword Search

TRADE SHOW SPONSOR ACCOMMODATIONS

Fueling the Future - Hydrogen Fueling Station Funding Opportunities Tuesday, 1:45 pm - 2:45 pm

Focus:

State government grant funding is available to integrate hydrogen into your retail fueling operations. State government funding agency representatives, hydrogen station developers, hydrogen station operators and auto makers discuss the need for stations, the funding process, and implementation challenges.

Background:

In response to the California Air Resources Board (ARB) Zero Emission Vehicle (ZEV) program requirements, major automakers have been required to produce and sell increasing numbers of ZEVs in California and other states that have adopted the ARB ZEV program. The vehicles initially produced to meet these requirements included hybrid-electric and battery-powered electric vehicles. In addition, automakers have also collectively spent billions of dollars in developing fuel cell electric vehicles that run on hydrogen. The short refueling time (5-7 minutes) and the vehicle range (over 300 miles per tank in some models) make these vehicles attractive to automakers as a long-term viable replacement for conventional gasoline-powered passenger cars and light-duty vehicles.

Currently, Daimler (Mercedes-Benz) and Honda are leasing hydrogen fuel cell vehicles to consumers in select areas in California. In addition, Toyota, GM, and Hyundai have fuel cell vehicles currently being loaned to select organizations for road testing of their fuel cell vehicles.

The challenge now is to fund and build the hydrogen fueling station network throughout California to support the successful commercial introduction of

fuel cell identified Tuesday, August 26 /201208

WHOI FSALF CROSS-OVER RFTAII What Drives Consumer 12:30 pm -The UST Cleanup Fund: Fading Behavior...and Other Information 1:30 pm into the Sunset? to Make You More Profitable! Developing a High Performance Mergers & Acquisitions 101 -Fueling the Future - Hydrogen 1:45 pm -Management Team (and Proper Preparation Prevents Fueling Station Funding 2:45 pm Growing the Value of Your Poor Performance Opportunities Company in the Process) 3:00 pm -National Government Affairs How to Improve Work Place CARB Session 4:30 pm Update Safety and OSHA Compliance

FUELS INSTITUTE

No Longer a Pipe Dream

If the right factors are met, hydrogen fuel cell vehicles could be a viable option for consumers and retailers.

BY JOHN EICHBERGER



Accomplishments and progress, continued.

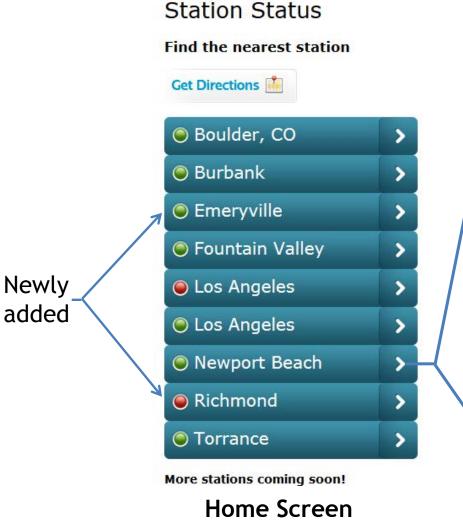
Consumer confidence and FCEV usability

- 2 new stations were added to the Station Operational Status System (SOSS) - Emeryville & Richmond
- Secured strong automaker interest to accelerate and expand original SOSS SOW and timeline

National Emergency Response program

- Completed draft national ER training outline, including concept buy-in of major industry stakeholders
- New H2-FCEV online training module added to NFPA website, in collaboration with national outline project
- Developed new "Fire and Safety" micro-site for first responder community <u>http://cafcp.org/toolkits/safety</u>

SOSS



California

Driving for the future

Home Station Status Newport Beach -Jamboree Rd

Newport Beach -Jamboree Rd



Status: ONLINE H35*: 66 KG H70*: 98 KG Last Updated: 05/20/14 11:10am *H35 = 35 MPa or 5,000 PSI *H70 = 70 MPa or 10,000 PSI

Address: 1600 Jamboree Blvd, Newport Beach, 92660 (Map)

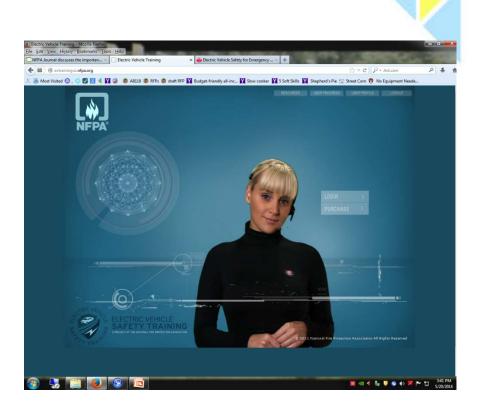
Opening Hours: 24/7



Safety and emergency response tools



CaFCP Fire and Safety micro-site http://cafcp.org/toolkits/safety



H2-FCEV online training module added to NFPA online EV Safety Training module <u>http://evtrainingus.nfpa.org/</u>

Collaborations

CaFCP partners

- » Car manufacturers (FCEV data, location data, market info)
- » Federal government agencies (RC&S, R&D support)
- » State and regional govt agencies (regulatory input, funding)
- » Fuel cell system manufacturers (*expertise*, *industry data*)
- » Electrolyzer manufacturers (expertise, renewable H2 data)
- » Universities (modeling, scenarios)
- » National laboratories (evaluation, data, expertise)
- » Transit agencies (FCEB program data, HD experience & expertise)
- » Non-governmental organizations (enviro perspective)
- » Hydrogen gas companies (H2 infra expertise)
- » Gas utility company (industry info)

Collaborations, continued...

- Collaboration and communication
 - » Participation of all CaFCP members (govt, car OEM, infra, etc)
 - » Particular coordination with govt agencies on (new) tracking mechanisms
- Conventional fuel provider engagement
 - Established strong relationship among major industry associations, particularly in regards to their conferences and events (e.g. POC, SIGMA, WPMA, NACS/Fuels Institute)
- Consumer confidence and FCEV usability (SOSS)
 - » Automaker and equipment developers for input on vehicle/customer needs and station capabilities
 - » New H2 station operators as stations come online
- National ER program
 - » DOE HQ, PNNL, NFPA, National Fire Academy, NAFTC and automakers for review of existing programs and needs

Proposed future work

- Continue updates and further refinement of industry and station reports, including new H2 Station Smartsheet
- Continue direct outreach to fuel retailers and marketers
 - Support NACS/Fuels Institute concept proposal to develop H2-FCEV industry review related to retail fuels market (fall 2014)
 - Leverage Los Angeles location of Pacific Oil Conference for extensive H2 & FCEV sessions, ride-n-drive, etc (Sep 2014)
 - Present at future fuel provider industry events; NACS (Oct 2014), WPMA (Feb 2015), SIGMA Spring conference (TBD)
- Add all recently funded CA H2 station (7 in 2013, 28 in 2014) to SOSS as they come online
 - » Work with stakeholders to significantly upgrade SOSS platform
- Work with ER stakeholders to complete the national emergency response outline
 - Present concept at NFPA conference (Jun 2014), Continuing Challenge (Sep 2014), and Corona Auto-X (Apr 2015)
 - » Conduct "train the trainer" sessions with national outline (TBD)
 - » Conduct annual assessment and review of national program

Summary

- Project reporting documents used by lead CA agency as basis for new station status and tracking Smartsheet
- Leveraged both CaFCP member and larger stakeholder meetings to facilitate collaborative discussion and progress
- Successfully reached conventional fuel retailers and marketers via 4 major industry conferences, with positive reaction interest in participating in the H2 FCEV industry
- 2014 CA solicitation saw 2.5x more respondents applying for over 6x more station projects from 2013 solicitation
- Developed targeted micro-websites for fuel retailer/marketer and fire/safety market stakeholders
- Added 2 additional H2 stations to SOSS
- Completed initial draft of national emergency response outline with buy-in from the primary industry stakeholders



H2-FCEV Commercialization Facilitating collaboration, obtaining real world expertise, and developing new analysis tools

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