



Netherlands Enterprise Agency

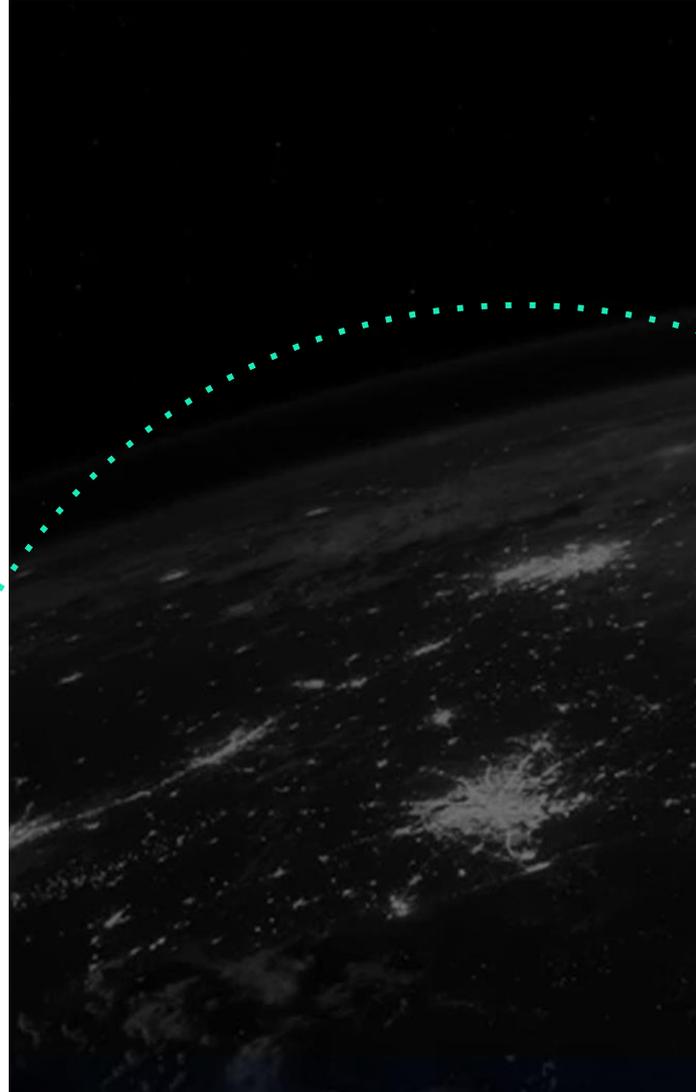
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Hydrogen sector study France

Hydrogen in France, developments and opportunities for the
Netherlands

Commissioned by

Netherlands Enterprise Agency (RVO)
Embassy of the Kingdom of the Netherlands in France
Netherlands Business Support Office Lyon & Nantes



Executive summary (1/2)

Context

On 8 September 2020, the French government presented its **national hydrogen strategy**: over 7 billion euros until 2030 will be made available for the development of a low-carbon hydrogen industry on an international scale (of which 2.2 billion between 2020 and 2022). There is general agreement that it is now time to use the **experience and knowledge gained from projects in France**. The research question for this study is therefore: **How are French hydrogen technologies, markets and policies regarding green hydrogen developing and which synergies can be found with Dutch actors in the hydrogen sector?**

Main results

This study has observed that **France has expertise and actors on many parts of the hydrogen value chain**. This large number of players, supported by an **ambitious national strategy** and the **desire to develop a competitive sector**, create opportunities for cooperation. In addition to this, foreign players wishing to participate in public tenders are encouraged by the public authorities to participate in the development of the French sector (local employment, exchange of know-how and technologies). **The three main areas for Dutch actors to find synergies French actors** in the hydrogen sector are:

1

Apply to the regional and national call for tenders

Take the opportunity of the infatuation of French regional and national politics for hydrogen development through the call for tenders and engage in local activity development (e.g. jobs creation)

2

Direct company-to-company cooperation

Utilize market opportunities, addressing the specific needs or knowledge areas in the French or Dutch markets where countries could learn from or complement each other.

3

Apply to EU call for tenders or subsidy programs

Benefit from the multiple financing counters from EU programs (e.g. FCH-JU, IPCEI, FEDER) to build up projects with French companies

Executive summary (2/2)

Recommendations – public and private sector

- 1 We see a need for the Netherlands to **be part of the Franco-German cooperation**
- 2 We see a need to **improve the attractiveness of the business climate for foreign (electrolysis) OEMs** in the Netherlands
- 3 Continue **strong lobbying between ministries with France and the Netherlands**
- 4 The **Dutch subsidy climate should improve in transparency and support of the smaller innovative companies**
- 5 **In our study a navigation/cartography of actors in France has been made** for each hydrogen sector, this could be extended with a digital 'marketplace'.

Highlights cooperation opportunities

- 1 In France there is an enormous **dynamic regional hydrogen activity**. Dutch companies should find opportunities there and learn from this regional development.
- 2 In company to company cooperation we see that the **largest chances** for cooperation is in the **Electrolysis** and **Road Mobility** sector.
- 3 **Cooperation can be on Dutch ground as well as in France**, where we see cooperation with OEMs here as a large opportunity.
- 4 **Participation to European subsidy programs is also an option** though it seems in many cases more suitable for the larger organisations. It is clear which programs are there and which countries or companies participate.