

# Energy Transition Dialogues

## DAILY BULLETIN



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MONDAY /// MARCH 7<sup>th</sup>

### TOP 10 DAILY NEWS DIGEST

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**1. GCC REQUIRE GRID-RELATED INVESTMENTS OF US\$50 BILLION**

**2. CLEAN ENERGY TRANSITION WOULD BREAK RUSSIA'S GEOPOLITICAL HOLD**

**3. DEVELOPING WORLD'S NEED FOR CLIMATE FINANCE GROWS EVER MORE URGENT**

**4. IS HYDROGEN THE KEY TO A GREENER SHIPPING INDUSTRY?**

**5. OIL & GAS PRICES ARE SURGING - WHAT THAT MEANS FOR RENEWABLE ENERGY STOCKS**

**6. TRANSFORMATIONAL BUDGET FOR TRANSITIONAL ENERGY ECONOMY IN INDIA**

**7. FUTURE OF MOBILITY: BATTERY SWAPPING AND CHARGING STATIONS**

**8. GLOBAL ENERGY LEADERS CONVENE IN HOUSTON FOR ANNUAL CERA WEEK**

**9. WE CANNOT FORGET SAVING OUR PLANET DESPITE ENERGY SECURITY RISKS**

**10. INDONESIA PUSHES USE OF ELECTRIC VEHICLES FOR GREEN ENERGY TRANSITION**

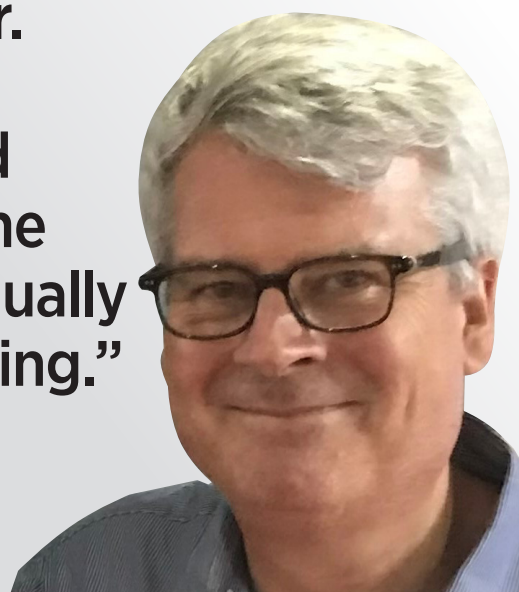


### EXCLUSIVE SOUNDING

“Putin’s savaging of Ukraine shouldn’t cause climate despair. There’s just as much reason to believe it will spark a wider and deeper commitment to solve the less immediately urgent but equally grave crisis that is global warming.”

**Bill Spindle**

Council on Foreign Relations  
International Affairs Fellow in India



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## Energy Transition Dialogues VIEWS YOU CAN USE



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### Dr. Naveed Akhtar

Founder and CEO  
Hy-Hybrid Energy



Some say the private sector has collectively announced up to \$300bn worth of additional investment in hydrogen. These numbers are far too ambitious. There is no doubt that the demand is there, but where is all this money going to come from? The forecast for the cost of electrolyzers is also far, far too high. This is one cause of nervousness among investors. The costs of electrolyzers, for example, must fall in order to bring a green hydrogen economy into play. Instead of making big announcements, we really need to develop efforts on the ground. I am currently leading a 400MW green hydrogen project overseas and these are the sorts of challenges we are seeing. Investors need to see what they can expect in terms of turnover and return on their investment (ROI). For some, if they invest money now, they will wait at least ten years [to recoup] as other market costs like electrolyzers still need to fall.

### Hydrogen in the clouds

Developing hydrogen fuel cells for use in aviation is an ongoing effort, as some challenges must still be overcome. It will take some time to sort metric and volumetric challenges, for example. When we talk about fueling a large Airbus aircraft, the hydrogen fuel cell market is not ready at scale. I expect we will see hydrogen combusted by gas turbines in the next five to ten years, with hydrogen fuel cells becoming more common in the 2030s. ■

*\*Paraphrased Comments*

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PODCAST

WEDNESDAY /// MAR 9<sup>th</sup> /// 13.00 (UAE)



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#### *Hydrogen: Financing Hurdles in 2022?*



**Dr. Valentina Dedi**  
Lead Economist, Advisory Consulting  
KBR



**Oliver Phillips**  
Associate Director - Sustainable  
Finance - Africa & Middle East  
Standard Chartered Bank



**Dyala Sabbagh**  
Partner  
Gulf Intelligence

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