

Energy Transition Dialogues

DAILY BULLETIN



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MONDAY /// APRIL 11th

TOP 10 DAILY NEWS DIGEST

- THE ALLURE OF MIDDLE EAST HYDROGEN
- ENERGY TRANSITION WILL TRANSFORM GEOPOLITICS
- TIME TO ACCELERATE TRANSITION TO CLEAN, RENEWABLE ENERGY
- EU RENEWABLES PUSH TO QUIT RUSSIAN ENERGY
- IFM INVESTORS DELIVERS INFRASTRUCTURE OUTLOOK
- GLOBAL ENERGY SPENDING TO REACH OVER \$2TRN IN 2022
- HYDROGEN TWICE AS POWERFUL A GREENHOUSE GAS
- CHINA DEVELOPMENT BANK BOLSTERS SUPPORT FOR CLEAN ENERGY
- CFM: HYDROGEN IS THE TRUE ZERO CARBON SOLUTION
- ITALY'S DRAGHI SET TO SIGN DEAL IN ALGERIA TO EASE RUSSIA GAS FIX

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cynthiacaidoy@gulfintelligence.com

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VIEWS YOU CAN USE



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Amir Sharifi

Chief Investment Officer, Hy24
Energy Transition Lead, Ardian



Viability of Hydrogen Investment

Today, natural gas represents 24% of total energy consumption in Europe and 40% of that comes from Russia. Hydrogen and renewables can replace about 20% of that gas supply. This means various initiatives need to accelerate to drive local energy production towards renewables, including Hydrogen, which can be stored, transported over long distances, and can be utilized in many applications in the same way as oil and gas, but with zero carbon emissions.

On the fundamentals, Hydrogen is a great solution! If you no longer depend on the electricity grid and can generate renewable energy with an infrastructure built for Green Hydrogen production, effectively the cost of that Hydrogen, which is now based on current natural gas prices and with a CO2 price, is much more efficient. This can be a game changer for investors because even without public support, that's parity. We expect this to happen in a few years.

How has the Current Threat to Energy Security Dampened Investors' Appetite?

I am pleased to say that we are doing quite well. We targeted to raise \$1.5 billion in our new fund, and we are close to reaching our goal. There is a huge appetite to invest into this fund, which has also attracted industrial corporate groups. We are keen to create an initiative that allows industrial and financial investors come together under a common platform. We also found that our value proposition is interesting for target companies which look at a dedicated Hydrogen infrastructure as a valuable solution.

The steelmaking industry is the one that everyone has on their radar because it is an energy intensive industry, and hydrogen offers obvious solutions in that industry. The other one is Ammonia, as the CO2 penalties being imposed on Fertilizer companies mean that they need to switch to options such as Hydrogen derivatives. ■

**Paraphrased Comments*

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TWO MINUTE WARNING INTERVIEW SERIES

Dr. James Henderson

Director, Energy Transition Research Initiative &
Chairman, Gas Research Programme
The Oxford Institute for Energy Studies

TUESDAY /// APRIL 12th /// 11:00 (UAE)

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HYDROGEN FULL COURT PRESS

Alex Zapantis

General Manager - Commercial
Global CCS Institute

WEDNESDAY /// APRIL 13th /// 11:00AM (UAE)

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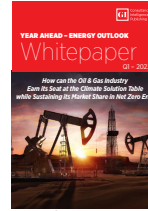
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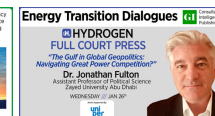
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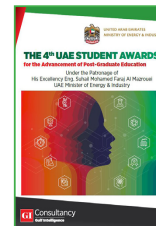
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ANNUAL AWARDS



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