

Energy Transition Dialogues

DAILY BULLETIN



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MONDAY /// APRIL 18th

TOP 10 DAILY NEWS DIGEST

- DUBAI'S RTA ENDORSES FIVE-YEAR SUSTAINABILITY PLAN
- PUBLIC SECTOR IS LAGGING BEHIND ON ESG REPORTING
- CLOCK IS TICKING DOWN ON WORLD'S CLIMATE CHANGE GOALS
- DEWA LAUNCHES RAMADAN DRIVE TO PROMOTE SUSTAINABILITY
- COULD NUCLEAR ENERGY BE SINGAPORE'S NET ZERO GAME CHANGER?
- MOROCCO LAUNCHES FIRST PHASE OF SOLAR ENERGY MEGA PROJECT
- GHANA EXPLORING HOMEGROWN OPTIONS FOR ENERGY TRANSITION
- JAPAN'S HYDROGEN ECONOMY RUNS RISK OF BEING POWERED BY COAL
- HOW PUSH FOR MODERN TECHNOLOGY HAS MADE CHINESE POND TOXIC
- RENEWABLE ENERGY SOURCES BREAKING ONE RECORD AFTER THE OTHER

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cynthiacaidoy@gulfintelligence.com

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VIEWS YOU CAN USE



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Emanuele Bianco

Associate Programme Officer
IRENA



Green Hydrogen Needs to be Protected as Still in Its Infancy!

Green hydrogen is still an infant industry that needs to be sheltered and protected from competition. While we are seeing some national strategies addressing the need to balance supply and demand, sometimes the strategies are all about export and are not creating a local demand. This may become an issue. The first production of green hydrogen is likely to be consumed locally and if there is no local demand, there is a risk that the supply will not happen because the offtake risk is just too big for investors. What must be done is to plan together, and this has something to do with industrial policy.

Today, 87 megatons of hydrogen are consumed every year. There is a demand for those projects that will decarbonize first, which is of course the industrial sector. There is already an enabling environment for producing green hydrogen. However, without an off taker, it would be a risk. In addition, standardization, regulation, and certification of green hydrogen need to be addressed in collaboration with the importing countries. The story of green hydrogen will not be the story of a cartel, like OPEC with oil. Every region that can produce this type of hydrogen is likely to produce and export it by 2050, and at a similar price point by that period.

Investing in blue hydrogen now will mean creating standard assets in the future, and I do not see investors willing to invest in a technology to use CCS (carbon capture and storage) for 10 to 15 years and see if they are there. They may not be requested anymore in the future. It is possible that there would be no demand for blue hydrogen by 2050 if it does not achieve very low carbon emissions, with 98% of carbon capture and storage and 0.2% of methane leakage. Maybe if they manage to reach that, it can become an actual consumer item. Otherwise, there is a risk that it would become just a standard asset. ■

**Paraphrased Comments*



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HYDROGEN FULL COURT PRESS

Boyana Achovski

Secretary General
Gas Infrastructure Europe

TUESDAY /// APRIL 19th /// 11:00AM (UAE)

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PODCAST

WEDNESDAY /// APRIL 20th /// 11:00AM (UAE)



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Jonathon Blackburn

Manager, Partnerships & Transactions
RWE Renewables



Claudia Zuluaga

Founder
The Future Is 50/50



Faris Al Kharusi

Principal Business Transformation Consultant
Petroleum Development Oman

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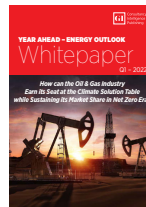
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