

# RESILIENT



# POWER

A Project of **Clean Energy Group**

## Hydrogen Fuel Cell Development Plans for the Northeastern States

Monday, May 4, 2015

Todd Olinsky-Paul  
Project Director  
Clean Energy Group



# Housekeeping



All participants are in “Listen-Only” mode. Select “Use Mic & Speakers” to avoid toll charges and use your computer’s VOIP capabilities. Or select “Use Telephone” and enter your PIN onto your phone key pad.

Submit your questions at any time by typing in the Question Box and hitting Send.

**This webinar is being recorded.**

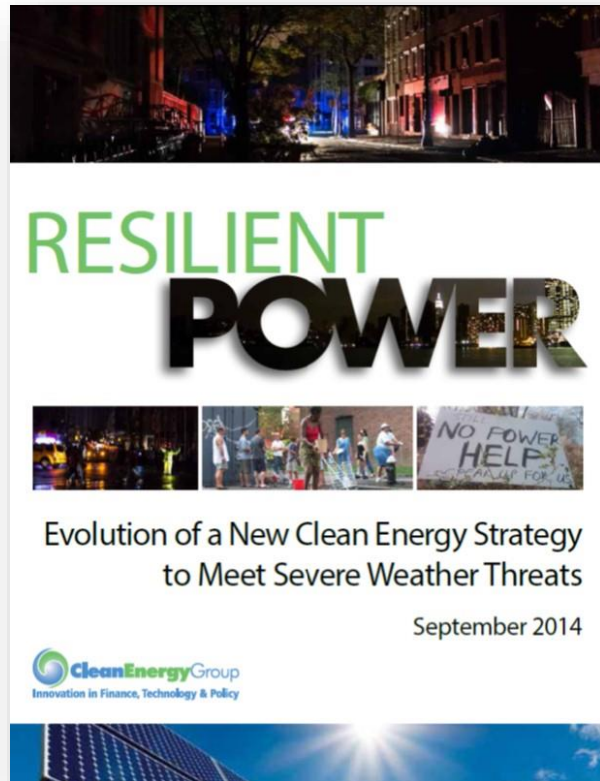
You will find a recording of this webinar, as well as previous Resilient Power Project webinars, online at:

[www.cleangroup.org/ceg-projects/resilient-power-project/webinars/](http://www.cleangroup.org/ceg-projects/resilient-power-project/webinars/)

and at

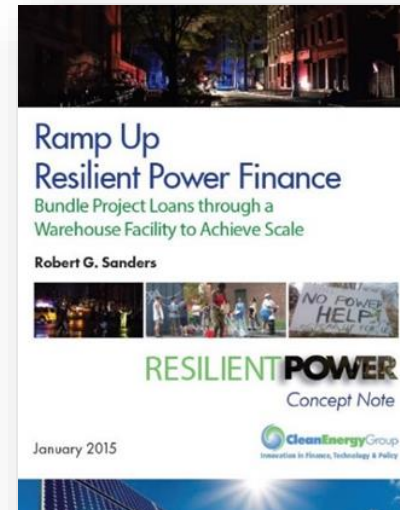
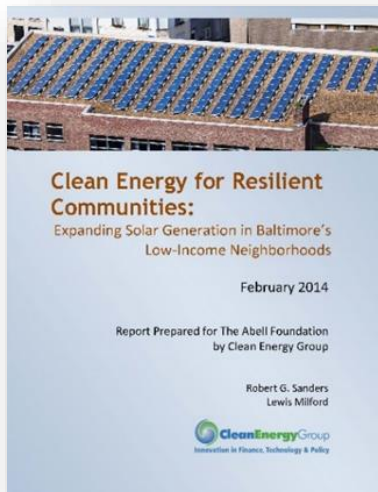
[vimeo.com/channels/resilientpower](http://vimeo.com/channels/resilientpower)

# Who We Are



# Resilient Power Project

- Increase public/private investment in clean, resilient power systems
- Engage city officials to develop resilient power policies/programs
- Protect low-income and vulnerable communities
- Focus on affordable housing and critical public facilities
- Advocate for state and federal supportive policies and programs
- Technical assistance for pre-development costs to help agencies/project developers get deals done
- See [www.resilient-power.org](http://www.resilient-power.org) for reports, newsletters, webinar recordings



# Today's Guest Speakers

- **Joel Rinebold**, Director of Energy Initiative, Connecticut Center for Advanced Technology (CCAT)
- **Jennifer Gangi**, Director of Communications and Outreach, Fuel Cell and Hydrogen Energy Association (FCHEA)
- **Kent McCord**, Director of Marketing Strategy, Doosan Fuel Cell America
- **Kevin Kinnaw**, National Manager, Toyota



Fuel Cell &  
Hydrogen Energy  
Association





# RESILIENT POWER

A Project of Clean Energy Group

## Hydrogen Fuel Cell Development Plans for the Northeastern States

May 4, 2015

**Joel M. Rinebold**  
**Connecticut Center for**  
**Advanced Technology, Inc.**

## 2015 Hydrogen and Fuel Cell Development Plans

- Economic IMPLAN model (jobs, revenue, companies)
- Technology, Applications, and Markets
- Stationary and Transportation Deployment Targets
- Policy and Drivers
  - Job Development
  - Energy Reliability
  - Storm Preparation
  - Environmental
  - Carbon Control



APPENDIX I - Figure 1

## Massachusetts: Potential Hydrogen and Fuel Cell Applications for Public Facilities

### Legend

- Landfills
- Correctional Facility
- Federally Owned Building
- Military Airports
- Military Base
- Wastewater Treatment Plants (ADF-10 mgd)
- Public Schools (With CHP Potential)
- Universities
- Hospitals
- Interstate
- Area Not Served by Natural Gas
- Area Served with Natural Gas



Produced with support provided by the U.S. SBA

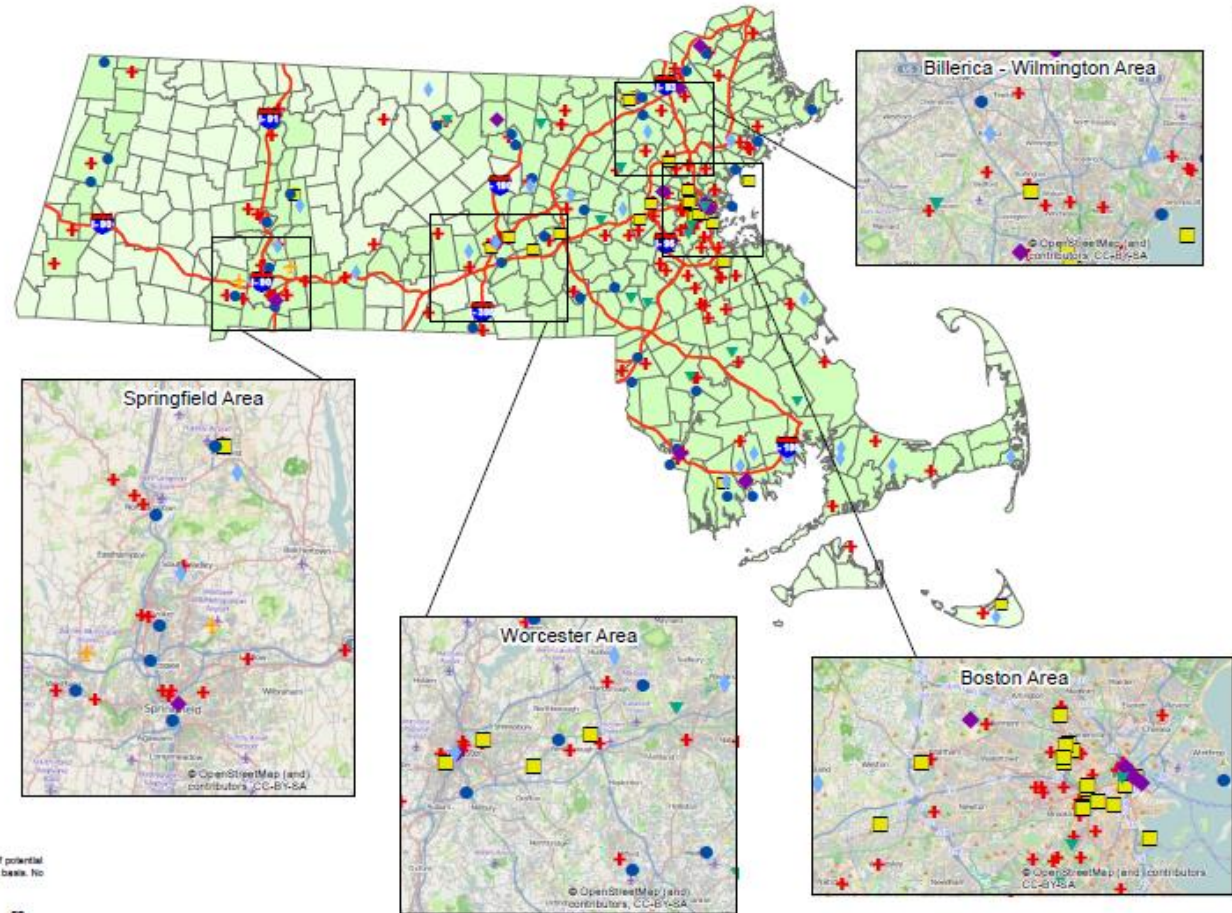
Sources:  
 Mass. Office of Geographic Information  
 U.S. Census Bureau  
 U.S. General Services Administration  
 U.S. Environmental Protection Agency  
 OpenStreetMap  
 HighSchools.com  
 ReferenceUSA  
 usa.militarybenefits.com  
 Federal Aviation Administration  
 www.usamilitarybenefits.com  
 Northwest Gas Association

Footnotes:  
 1) Public schools with combined heat and power potential indicate public schools that house swimming pools.

Disclaimer:  
 Information presented in this map is for planning purposes only. Verification of potential sites and their energy consumption has not been undertaken on a site-specific basis. No representation as to the accuracy of the data depicted is implied.



January 2015





APPENDIX I – Figure 2

## Connecticut: Potential Hydrogen and Fuel Cell Applications for Private Facilities

### Legend

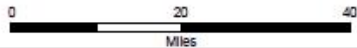
- Convalescent Homes (200+ Bed Count)
- + Commercial Airports
- Food Sales (150+ Employees)
- ▲ Energy Intensive Industry (100+ Employees)
- Interstate
- Area Not Served by Natural Gas
- Area Served by Natural Gas



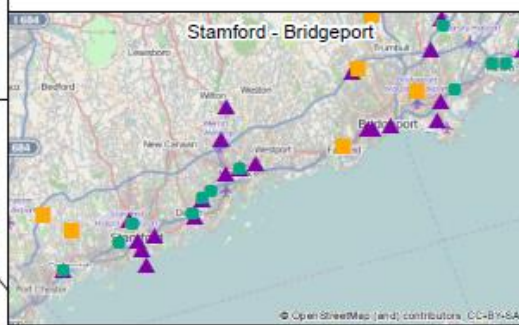
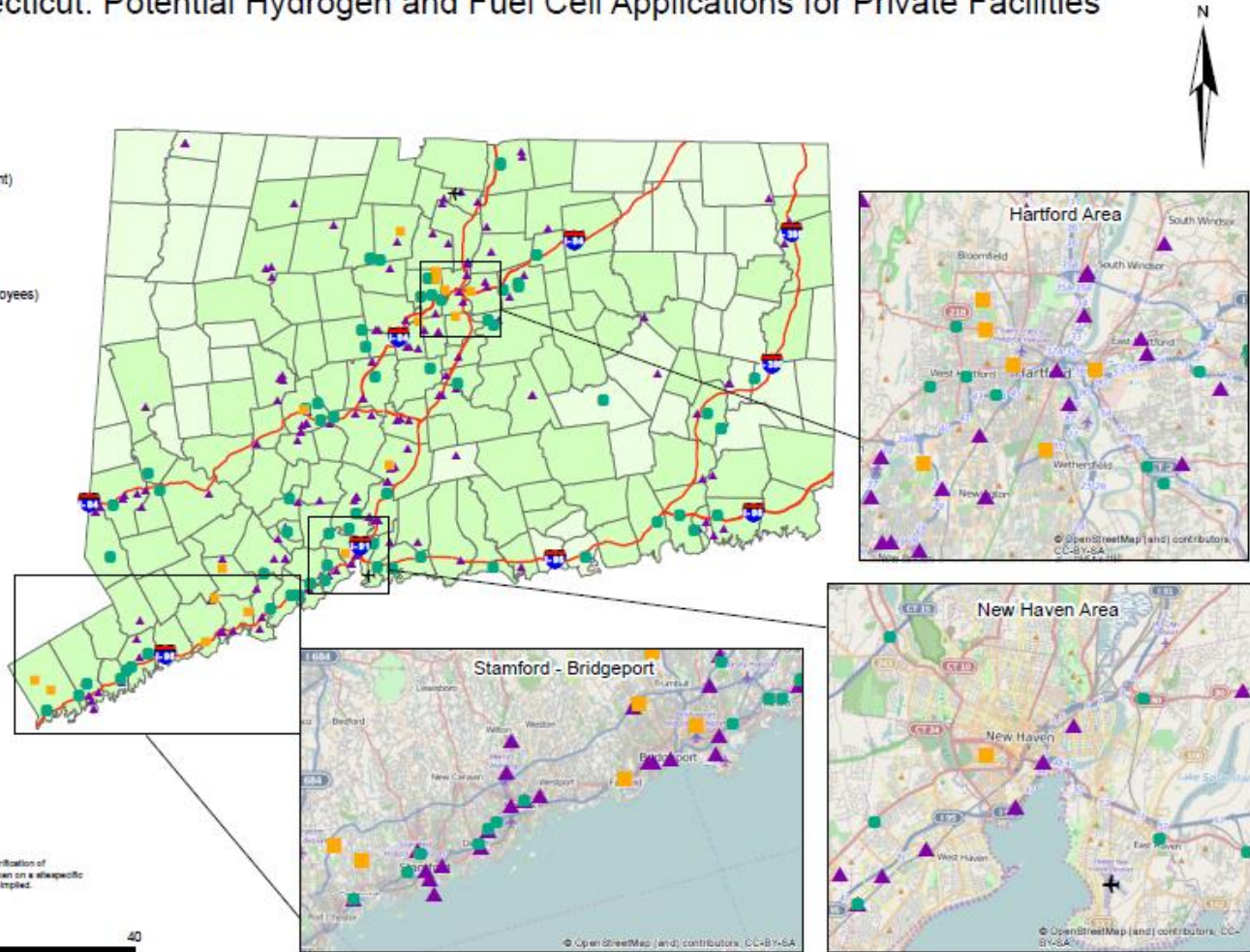
Produced with support provided by the U.S. SBA

Sources:  
 U.S. Census Bureau  
 ReferenceUSA  
 AxiatedLivingList.com  
 aBusiney.com  
 Federal Aviation Administration  
 Northwest Gas Association

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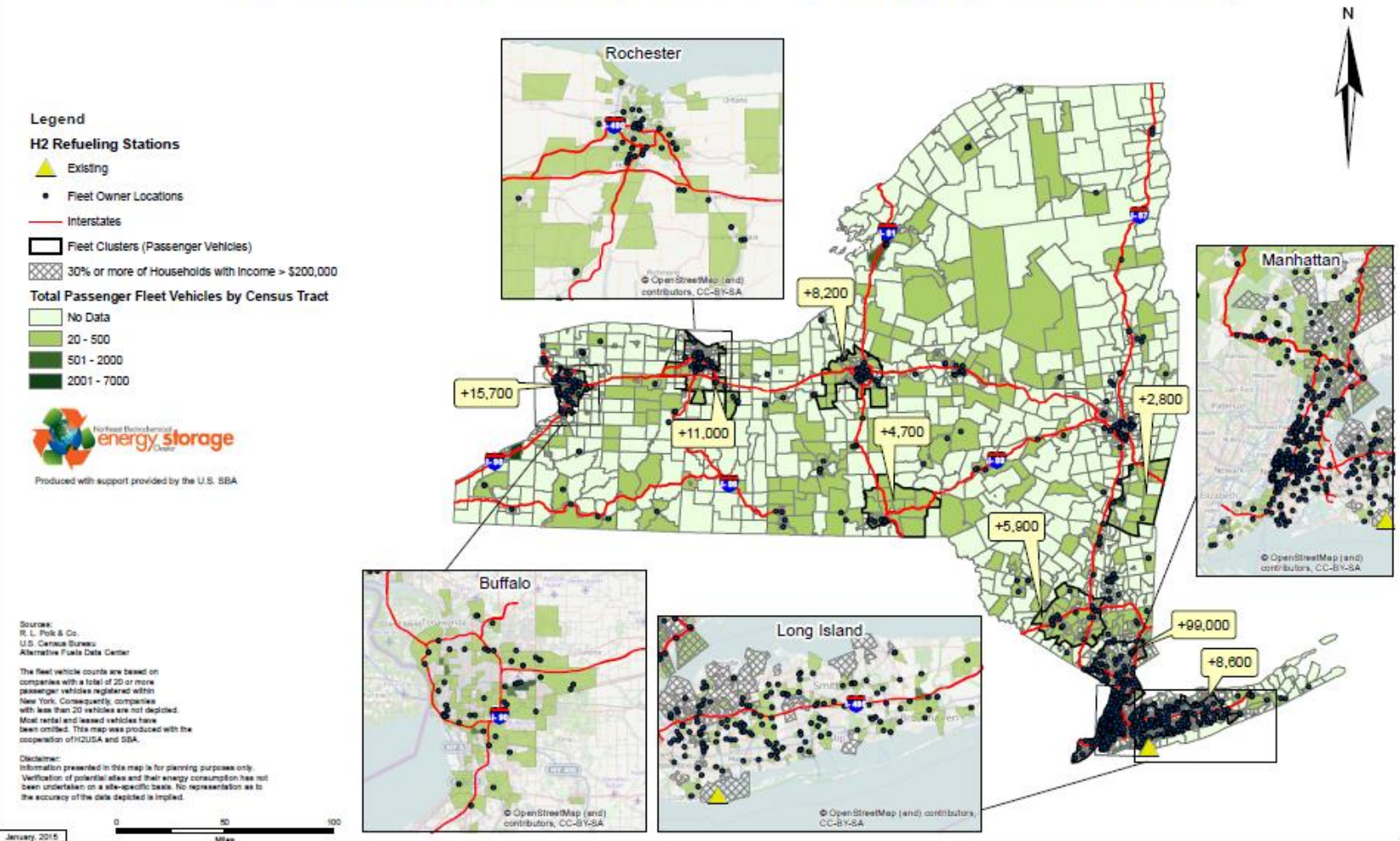


January 2015



APPENDIX I - Figure 4

## New York: Potential Hydrogen and Fuel Cell Applications for Transportation



## **Stationary (ME, NH, VT, MA, RI, CT, NY, NJ)**

- 1,313 to 1,753 MW fuel cell electric generation (2025)

## **Transportation (VT, MA, RI, CT, NY, MD)**

- 14,272 FCEVs (Fleet Projection)
  - [1.7 million by 2025 per CA projections]
  - 12,994 Passenger Vehicles
    - 589 FCEVs for State fleets
  - 696 transit/paratransit buses(FCEB)
- 133 to 148 hydrogen refueling stations

ME NH VT MA RI CT NY NJ

State Energy Policy/Incentives for Stationary Fuel Cells								
Mandatory Renewable Portfolio Standard (RPS)	Eligible	Eligible		Eligible	Eligible if Renewable	Eligible	Eligible	Eligible if Renewable
Net Metering	Eligible	Eligible	Eligible if Renewable	Eligible	Eligible if Renewable	Eligible	Eligible	Eligible if Renewable
Public Benefits Fund	Eligible		Eligible if Renewable	Eligible	Eligible if Renewable	Eligible	Eligible	Eligible if Renewable
Performance-Based Power Purchase	Eligible				Eligible if Renewable	Eligible	Eligible	
Utility Ownership/Investment						Eligible	Eligible	
State Grant Program		Eligible if Renewable	Eligible if Renewable		Eligible	Eligible	Eligible	Eligible
State Loan Programs			Eligible if Renewable		Eligible if Renewable	Eligible	Eligible	
Microgrid Reliability Program						Eligible	Eligible	
Property Tax Incentive (Commercial)			Eligible if Renewable			Eligible		Eligible
Sales Tax Incentive			Eligible if Renewable			Eligible	Eligible	
Property-Assessed Clean Energy (PACE) Financing						Eligible	Eligible	Eligible if Renewable
One Stop Regulatory Approval						Eligible		
Identified State "Point" Person								

Eligible     
 Eligible if Renewable

	ME	NH	VT	MA	RI	CT	NY	NJ
<b>State Energy Policy/Incentives for Hydrogen Transportation</b>								
Zero Emission Vehicle (ZEV) Program (FCEV/H <sub>2</sub> Infrastructure)			Eligible	Eligible	Eligible	Eligible	Eligible	
ZEV Purchase Target for State Government Fleets (TBD)			Eligible	Eligible	Eligible	Eligible	Eligible	
Purchase Incentives/"Point-of-Purchase" Rebates				Eligible				
Fuel Incentives								
Public/Private Infrastructure Partnership								
Fuel Efficiency Standard (Private/State Fleets)								
Refueling Infrastructure Incentives				Eligible				
REC Available for Renewable H <sub>2</sub>								
Tax Incentives								
HOV Lanes and Parking Incentives								
One Stop Regulatory Approval								
Identified State "Point" Person								



Eligible



Eligible if Renewable



**Joel Rinebold**  
**Director of Energy Initiatives**  
**Connecticut Center for Advanced Technology**  
**[jrinebold@ccat.us](mailto:jrinebold@ccat.us)**  
**(860) 291-8832**



Fuel Cell &  
Hydrogen Energy  
Association

# Fuel Cells in Northeast: A Market Overview

Jennifer Gangi

Director of Communications and Outreach, FCHEA

CESA Webinar

May 4, 2015

# About FCHEA

- The Fuel Cell and Hydrogen Energy Association (FCHEA) is the trade association for the fuel cell and hydrogen industry.
- Our mission is to advance the commercialization of, and promote the markets for, fuel cell and hydrogen energy technologies.
- FCHEA members represent the full global supply chain of the industry.





# FCHEA Members

DAIMLER



**HONDA**  
The Power of Dreams

**3M**



*Linde*

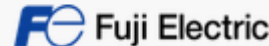


**BALLARD**

**NISSAN**

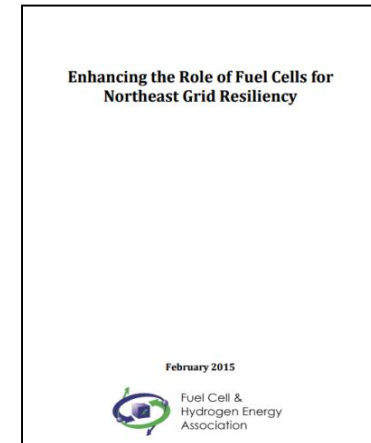
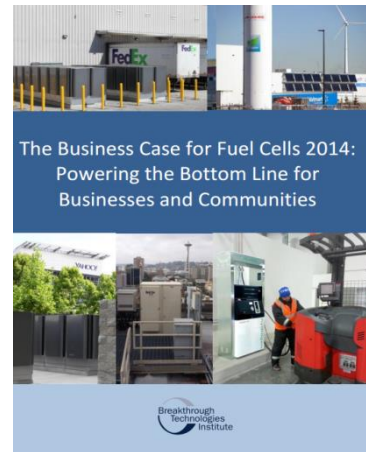
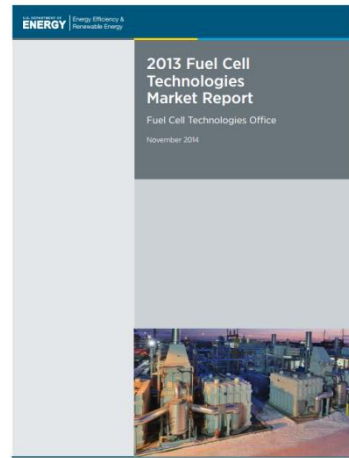
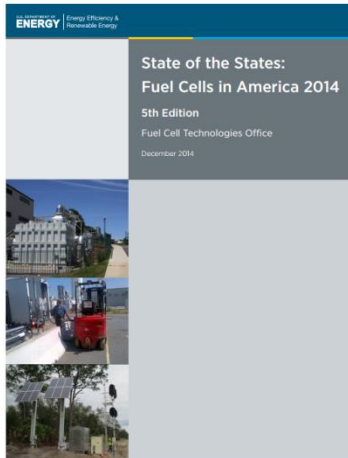
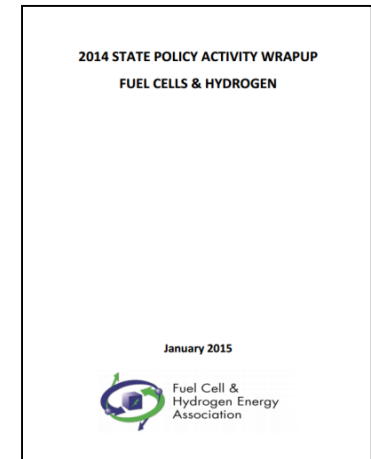
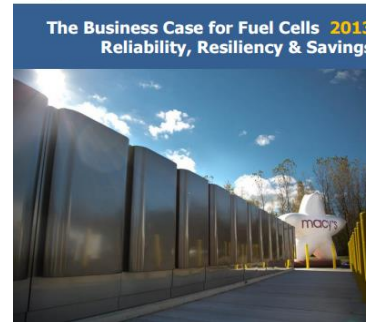
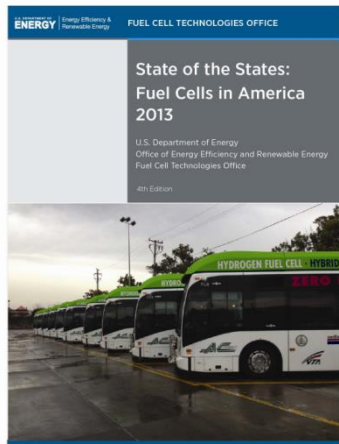


**Bloomenergy**

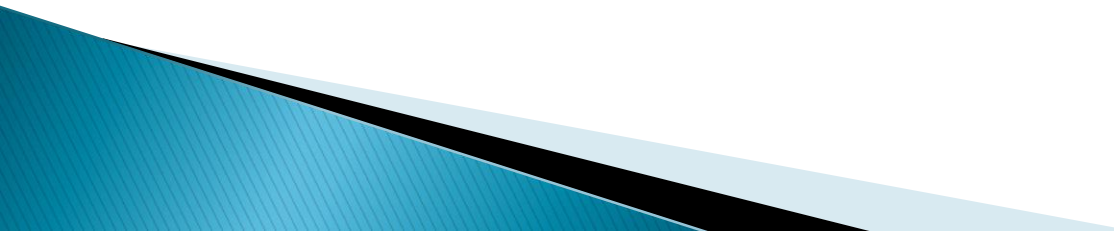


Fuel Cell &  
Hydrogen Energy  
Association

# Reporting on Industry



# Fuel Cells Getting Noticed

- 200+ MW in U.S. (conservative); 50+ in Northeast (>16 MW planned)
  - Resiliency/reliability hot topic in storm-prone states = funding for micro grid, DG, energy storage, diesel genset replacement
  - Water savings, smaller footprint
  - Natural gas, biogas
  - Larger systems deployed; Grid stability for intermittent solar, wind
  - Many customers = repeat ones with global reach, multiple facilities, influence over supply chain, room for growth
- 

# Stationary Power

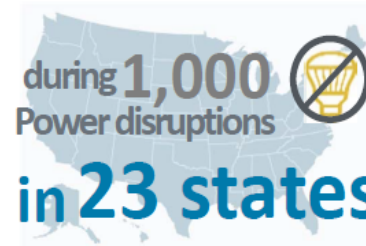
- NY and CT still U.S. leaders
  - NYSERDA – CST Fuel Cell Program funded 3+ MW – 5 Verizon office buildings (Brooklyn, Staten Island, Queens) and one at RIT
  - CT micro grid funding – 1.4 MW at U of Bridgeport, multi-MWs projects planned around state
- NJ – Energy Resilience Bank, Large Energy Users Program, CHP-FC
- Bloom Energy expanding into Northeast
  - NY – Morgan Stanley, Stop & Shop, City Hall
  - CT – Danbury Fair Mall, AT&T, Macy's, Comcast, other planned sites (Walmart/Sam's Clubs, Home Depots, IBM) approved by the CT Siting Council or for CT's RPS
- Telecommunications – ~4,000 installed at U.S. sites

# Fuel Cells Provide Resiliency to the Grid

**800**  
Fuel Cells  
for back up power  
**deployed**

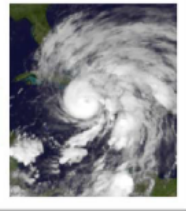


at cell phone  
towers  
providing  
electricity



AZ KY NC  
CA LA OR  
CO MA SC  
CT MI TX  
FL MS UT  
GA NV WA  
IL NJ WY  
IN NY

During  
**Hurricane  
Sandy**



the largest Atlantic hurricane on record



**5 sites**  
operated  
providing power  
**for over 100 hours**

as validated by NREL

*Source: "Hydrogen Fuel Cell Performance as Telecommunications Backup Power in the United States"  
NREL/TP-5400-60730*

***During Hurricane Sandy, the largest Atlantic hurricane on record, 5 sites operated providing power for over 100 hours as validated by NREL. 1,034 out of 1,047 successful starts.***

# Material Handling

- More than 7,500 deployed or on order
- >860 in Northeast
- Companies include:
  - Walmart – Johnstown, NY (263)
  - Sysco – Plympton, MA (198),  
Central Islip, NY (60)
  - Newark Farmer’s Market – NJ  
(206 total – 96, then 110)
- Hydrogen fueling provided by Northeast companies – Plug Power (NY), Nuvera (MA), Linde (NJ)



# Vehicles / Fueling

- Air Liquide working with Toyota on hydrogen fueling in Northeast – 12 stations at first, extending network as demand grows
- NESCAUM, Massachusetts Hydrogen Coalition, NE FC/H2 companies joined H<sub>2</sub>USA
- MOR–EV program in MA offers up to \$2,500 to residents who buy or lease clean electric vehicles – in 2015, additional \$2 million allocated
- Nuvera Fuel Cells had two Toyota FCEVs at its HQ in MA (until last week); Proton OnSite (CT) tested 10



# Other Markets

Fuel cells increasingly used to power remote or off-grid locations.

- Energy exploration – traditional (oil and gas) and renewable (solar and wind) equipment
  - Sites in NH, MA, PA, TX, CO, WV, AR, AK
- Railroads – >200 locations – switches, signals, railway crossings, monitoring, security and communications equipment



Showing great potential in other markets.

- Power-to-Gas/Energy Storage – big in Germany, first U.S. project in CA
- DOE demonstrations – GSE at airports, ports, TRUs





# Fuel Cell Seminar & Energy Exposition

*Fuel Cells: The Power to Drive Change TODAY*

November 16 - 19, 2015 | Los Angeles, California



Fuel Cell &  
Hydrogen Energy  
Association

## Westin Bonaventure Hotel

[www.fuelcellseminar.com](http://www.fuelcellseminar.com)

### Call for Abstracts Open

### Exhibitor/Sponsorship Opportunities Available

### Registration begins this Summer



# Thank You!

Fuel Cell and Hydrogen Energy Association  
1211 Connecticut Avenue, Suite 650  
Washington, DC 20036

202-261-1331

[www.fchea.org](http://www.fchea.org)

[jgangi@fchea.org](mailto:jgangi@fchea.org)

202-261-1339



Fuel Cell &  
Hydrogen Energy  
Association



Doosan

# Doosan Fuel Cell Overview



# PureCell® Fuel Cell System



## PureCell® Model 400

Ultra-clean, continuous-duty combined heat and power fueled by abundant, inexpensive natural gas



### Clean

- 90% system efficiency
- Ultra-low CO<sub>2</sub> and air emissions
- Zero water consumption



### Reliable

- Continuous-duty, onsite power
- High availability and capacity factor
- Grid-independent, backup capability



### Cost-Effective

- 10 year stack life, low life cycle costs
- Competitive with electric utility rates
- Financial solutions (PPAs, Leases)

# Doosan Fuel Cell America

Acquired ClearEdge Power assets July 2014

Headquarters and production facilities in South Windsor, CT

Focused on stationary fuel cell market in U.S. and Korea



**50**

years of fuel cell experience

**>400**

units sold

**12 million**

hours of fleet field operation

**98%**

fleet availability

**10**

year cell stack life

**20**

year service plans

# Doosan Group

## Global



- 10<sup>th</sup> largest Korean group company
- \$22 billion revenue
- 42,000 employees

## U.S.


- \$3 billion revenue
- 3000 employees
- Major brand: Bobcat

### Doosan Infracore

**Construction Equipment**

**Machine Tools**



**Engines**




### Doosan Engine

**Marine Engine**



**Engine Parts**



### Doosan E&C

**Chemical Equip.**




**Construction**




### Doosan Heavy Industries

**Equipment**


**Boiler**



**Turbine**




**Nuclear Component**




**Power EPC**



**Water EPC**



**Casting/Forging**



### Doosan Corporation

**Electro-Material**



**Mottrol**



**Industrial Vehicle**



**Fuel Cell**



# Diverse Customers in Key Markets

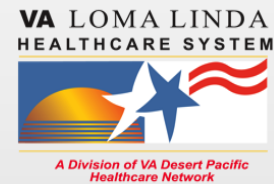
## Data Centers / Telecom



## Universities



## Hospitals



## Industrial/Production



# Diverse Customers in Key Markets

## Utilities



## Retail



## Commercial / Mixed Use



## Government





# Hospitals



## PureCell® System in Hospital Applications

- 24/7 demand for electricity and heat
- Heat recovery for space heating and domestic hot water



### St. Francis Hospital – Hartford, CT

- Two 400 kW installations at two different campuses
- Continuous power generation with grid-independent critical power capability
- Heat recovery for space heating and domestic hot water



### VA Loma Linda Hospital – Loma Linda, CA

- 800 kW continuous power generation
- Overall efficiency > 70% with heat recovery for space heating and domestic hot water



### St. Helena Hospital – St. Helena, CA

- 400 kW continuous-duty combined heat and power
- Challenging OSHPD CA building code approval

# Value of NEESC Development Plans

Developing target customer list  
in Hospitals and Universities in  
Northeast states

Name	Town	Bed	NYSERDA CHP guideline (kW)	NYSERDA guideline # Model 400	Est. floor space	Est. Annual Electricity Use (kWh)	Est. Ave. electric demand (kW)	# of Model 400s (@440kW)	Est. Natural Gas usage (MMBtu)	Ave. Nat. Gas demand (MMBtu/hr)	# of Model 400s (1.7 MMBtu/h)
Yale-New Haven Hospital	New Haven	1030	2060	4.7	2,137,250	55,995,950	6,392	14.5	261,599	29.9	17.6
Hartford Hospital	Hartford	819	1638	3.7	1,699,425	44,524,935	5,083	11.6	208,010	23.7	14.0
Saint Francis Hosp and Med Ctr	Hartford	617	1234	2.8	1,280,275	33,543,205	3,829	8.7	156,706	17.9	10.5
Hospital of Saint Raphael (YNNH)	New Haven	511	1022	2.3	1,060,325	27,780,515	3,171	7.2	129,784	14.8	8.7
St Vincent's Medical Center	Bridgeport	473	946	2.2	981,475	25,714,645	2,935	6.7	120,133	13.7	8.1
Bridgeport Hospital	Bridgeport	425	850	1.9	881,875	23,105,125	2,638	6.0	107,942	12.3	7.2
Connecticut Valley Hospital	Middletown	418	836	1.9	867,350	22,724,570	2,594	5.9	106,164	12.1	7.1
Hospital of Central Connecticut	New Britain	414	828	1.9	859,050	22,507,110	2,569	5.8	105,148	12.0	7.1
Masonic Healthcare Center	Wallingford	382	764	1.7	792,650	20,767,430	2,371	5.4	97,020	11.1	6.5
Danbury Hospital	Danbury	371	742	1.7	1,314,361	34,436,258	3,931	8.9	160,878	18.4	10.8
Waterbury Hospital	Waterbury	367	734	1.7	761,525	19,951,955	2,278	5.2	93,211	10.6	6.3
Saint Mary's Hospital	Waterbury	347	694	1.6	720,025	18,864,655	2,153	4.9	88,131	10.1	5.9
Hebrew Home & Hospital	West Hartford	334	668	1.5	693,050	18,157,910	2,073	4.7	84,829	9.7	5.7
Norwalk Hospital	Norwalk	328	656	1.5	680,600	17,831,720	2,036	4.6	83,305	9.5	5.6
Stamford Hospital	Stamford	305	610	1.4	632,875	16,581,325	1,893	4.3	77,464	8.8	5.2
Lawrence & Memorial Hospital	New London	280	560	1.3	581,000	15,222,200	1,738	3.9	71,114	8.1	4.8
Manchester Memorial Hospital	Manchester	249	498	1.1	516,675	13,536,885	1,545	3.5	63,241	7.2	4.2
William W Backus Hospital	Norwich	233	466	1.1	483,475	12,667,045	1,446	3.3	59,177	6.8	4.0
Hospital for Special Care	New Britain	228	456	1.0	473,100	12,395,220	1,415	3.2	57,907	6.6	3.9
Univ of CT Health Center	Farmington	224	448	1.0	464,800	12,177,760	1,390	3.2	56,892	6.5	3.8
VA Connecticut Healthcare Syst	West Haven	216	432	1.0	448,200	11,742,840	1,341	3.0	54,860	6.3	3.7
Veterans Home and Hospital	Rocky Hill	215	430	1.0	446,125	11,688,475	1,334	3.0	54,606	6.2	3.7
Greenwich Hospital	Greenwich	206	412	0.9	427,450	11,199,190	1,278	2.9	52,320	6.0	3.5
Connecticut Children's Med Ctr	Hartford	187	374	0.9	388,025	10,166,255	1,161	2.6	47,494	5.4	3.2
Griffin Hospital	Derby	160	320	0.7	332,000	8,698,400	993	2.3	40,637	4.6	2.7
MidState Medical Center	Meriden	156	312	0.7	323,700	8,480,940	968	2.2	39,621	4.5	2.7
Bristol Hospital	Bristol	154	308	0.7	319,550	8,372,210	956	2.2	39,113	4.5	2.6
Winnham Community Health Center	Williamantic	144	288	0.7	298,800	7,828,560	894	2.0	36,573	4.2	2.5
Middlesex Hospital	Middletown	136	272	0.6	282,200	7,393,640	844	1.9	34,541	3.9	2.3
Cedars-Belfrage Hospital	Newington	131	262	0.6	271,825	7,121,815	813	1.8	33,271	3.8	2.2
The Charlotte Hungerford Hosp	Torrington	109	218	0.5	226,175	5,925,785	676	1.5	27,684	3.2	1.9
Gaylord Hospital	Wallingford	107	214	0.5	222,025	5,817,055	664	1.5	27,176	3.1	1.8
Milford Hospital	Milford	106	212	0.5	219,950	5,762,690	658	1.5	26,922	3.1	1.8
Day Kimball Hospital	Putnam	104	208	0.5	215,800	5,653,960	645	1.5	26,414	3.0	1.8
Riverview Hospital for Child	Middletown	102	204	0.5	211,650	5,545,230	633	1.4	25,906	3.0	1.7
Rockville General Hospital	Rockville	102	204	0.5	211,650	5,545,230	633	1.4	25,906	3.0	1.7
<b>Total Potential Units</b>				<b>41</b>				<b>154</b>			

An aerial photograph of a city grid, likely Los Angeles, with a light blue and tan color palette. The grid lines are clearly visible, and the overall tone is muted and professional.

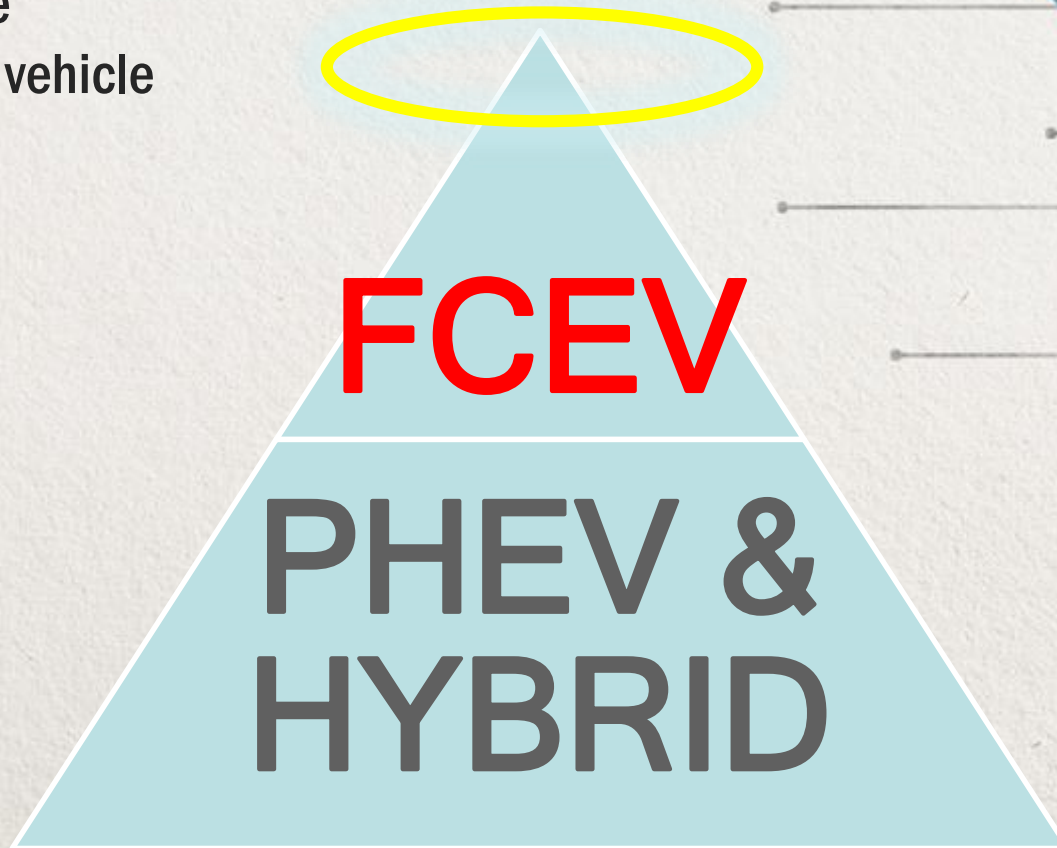
# **Toyota's Portfolio of Advanced Technology Vehicles**

**Kevin Kinnaw  
Toyota Motor Sales, USA**



# LEAD BY EXAMPLE : 8-STATE ZEV MOU

Set the future in motion and help the NE States lead ZEV adoption, with the FCEV as the environmental halo vehicle



# MIRAI

Fuel Cell Vehicle



 **LEAVE YOUR MARK** BY LEAVING NO MARK AT ALL.

Show your support at [toyota.com/mirai](https://toyota.com/mirai)

# NORTHEAST STATES LAUNCH NYC TO HARTFORD TO BOSTON



# MIRAI : FUEL CELL ADVANTAGES

Fuel Cells are:

1 **Zero Emission Vehicles**

2 **Energy Efficient**

3 **Transportation  
solution to address  
Climate Change**





# MIRAI FEATURES – ALL STANDARD

## COMFORT

- Softex Seats
- Heated Front/Rear Seats
- Driver/Passenger 8-way Power Seats w/ Memory
- Heated Synthetic Leather Steering Wheel

## CONVENIENCE

- Smart Key
- Rain-sensing Wipers
- Wiper De-Icer

## TECHNOLOGY

- 7" AVN screen and three 4.2" TFT Screens
- JBL Audio & 11 speakers
- HD Satellite Radio
- Entune App Suite
- Wireless Charger
- Hydrogen Station Finder & Status



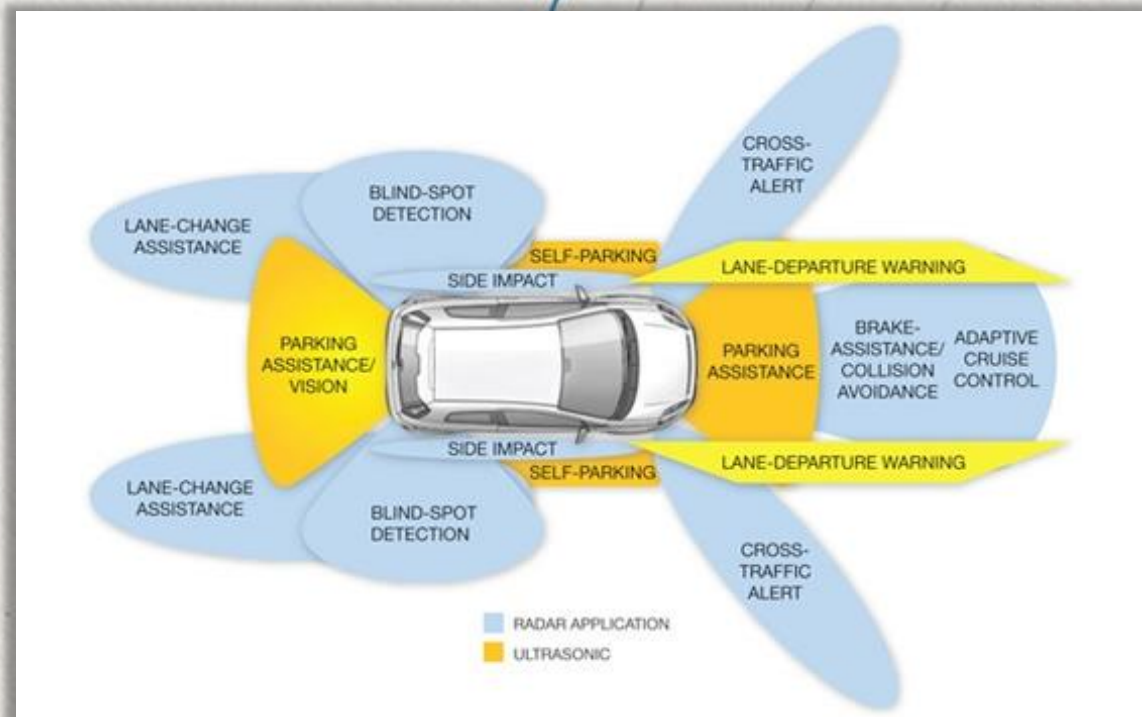
FCV Concept Interior



# MIRAI FEATURES – ALL STANDARD

## SAFETY

- 7 Airbags
- Adaptive High Beams
- Back-up Monitor
- Blind Spot Monitor
- Lane Keep Assist
- Pre-Crash System
- Vehicle Stability Control
- Clearance & Back Sonar



# PLANNED OWNERSHIP EXPERIENCE

- **360° Total Ownership Experience Program**
  - 3-Year Maintenance (ToyotaCare Plus) TBD
  - Enhanced Roadside Assistance
  - 24/7 Live Customer Support
  - Pre-Paid Fuel Available
- **Power Take-Off Option**
  - Power supply in an emergency/power outage

**\$499/Mo.**



# 8 YEAR/100K MILE WARRANTY

10 key components covered by the **8yr/100K mile Warranty**:

- **Battery Pack**
- **Battery ECU**
- **FC Air Compressor**
- **FC Boost Converter**
- **FC ECU**
- **FC H2 Tanks**
- **FC PCU (Power Control Unit)**
- **FC Stack**
- **HF ECU (H2 Fueling ECU)**
- **Power Management ECU (HV ECU)**

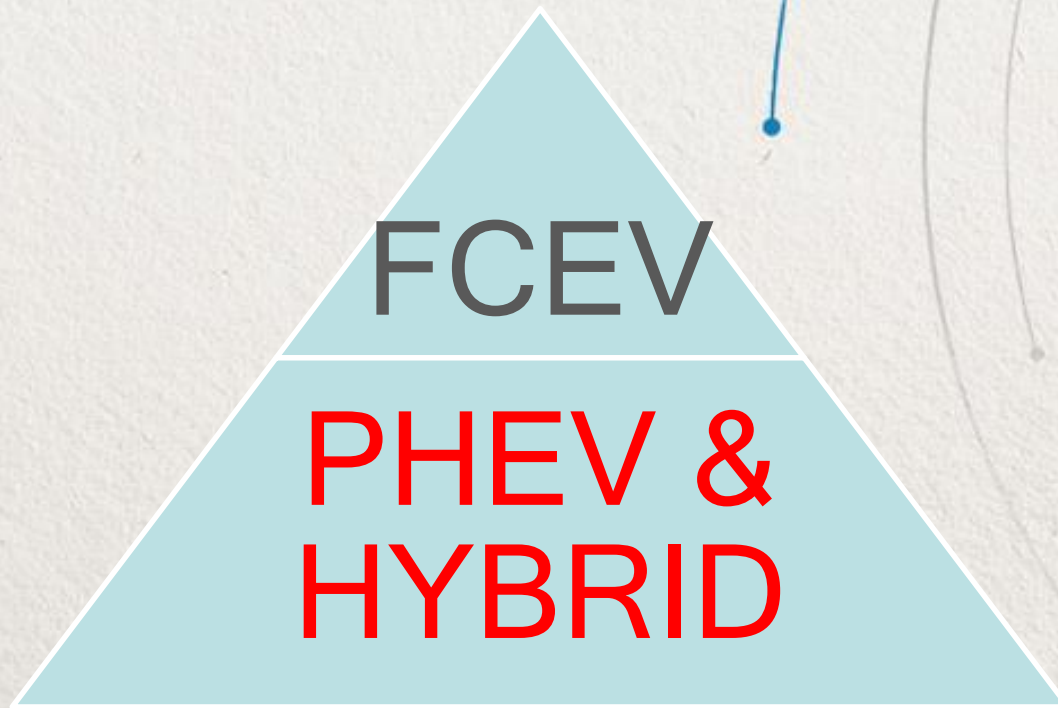
In addition, the following components are covered by a **5yr/60K mile Powertrain Warranty**:

- **Transaxle & mounts**
- **Axle shaft, hub, bearings, seals & gaskets**

**All other components are covered by a 3yr/36K mile Basic Warranty.**

# VISION: CUSTOMER CONVENIENCE

Prius laid the foundation for the future of no compromise mobility....



# THE TOYOTA HYBRID FAMILY



# THE TOYOTA HYBRID FAMILY



Highlander FWD & AWD



Camry



Avalon

RAV4 Hybrid AWD  
available late 2015



# RESILIENT POWER

A Project of Clean Energy Group

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