

# TRANSITION STRATEGIES

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# Transition Strategies

## Possible Range of Government Support Options

- Hydrogen Fuel Initiative – 2015 commercialization decision
- 2015 commercialization decision – 1000s of cars by 2015, and 10,000s of cars by 2018
- 2015 commercialization decision, 100,000s of cars by 2018
- 2010 commercialization decision, 10,000s of cars by 2015 and 100,000s of cars by 2018
- 2010 commercialization decision, 100,000s of cars by 2016 and millions by 2021.

These scenarios are provided for transition analyses as recommended by the National Research Council to evaluate the transition phase and do not represent any specific policy recommendation.



# Market Penetration Scenarios

The following scenarios represent the estimated penetration of hydrogen fuel-cell vehicles (HFCV) given different government incentives:

## A. Introduction strategies following “Hydrogen Fuel Initiative”:

**Option 1:** In 2015 HFCVs are introduced into the market. The government introduces a program to support the introduction of *thousands* of vehicles per year and by 2018 the government supports the introduction of *tens of thousands* of vehicles per year. This option is expected to have a market penetration of 1.8 million HFCVs by 2025.

**Option 2:** Same as option 1, but the government supports the introduction of *hundreds of thousands* of HFCVs by 2018. Expected market penetration for this option is 3.4 million HFCVs by 2025.

## B. Early Introduction Strategy:

**Option 3:** The government supports the introduction of *thousands* of HFCVs by 2012, and *tens of thousands* by 2015 and by the *hundreds of thousands* by 2018. This strategy is expected to have a market penetration of 5.0 million HFCVs by 2025.

**Option 4:** The government supports the introduction of *thousands* of HFCVs by 2012, and *millions* by 2021. Expected market penetration is 10.0 million by 2025 with support for multiple OEMs and multiple vehicle models.



# Market Penetration Scenarios

Government Support - Program Options (in thousands of vehicles)

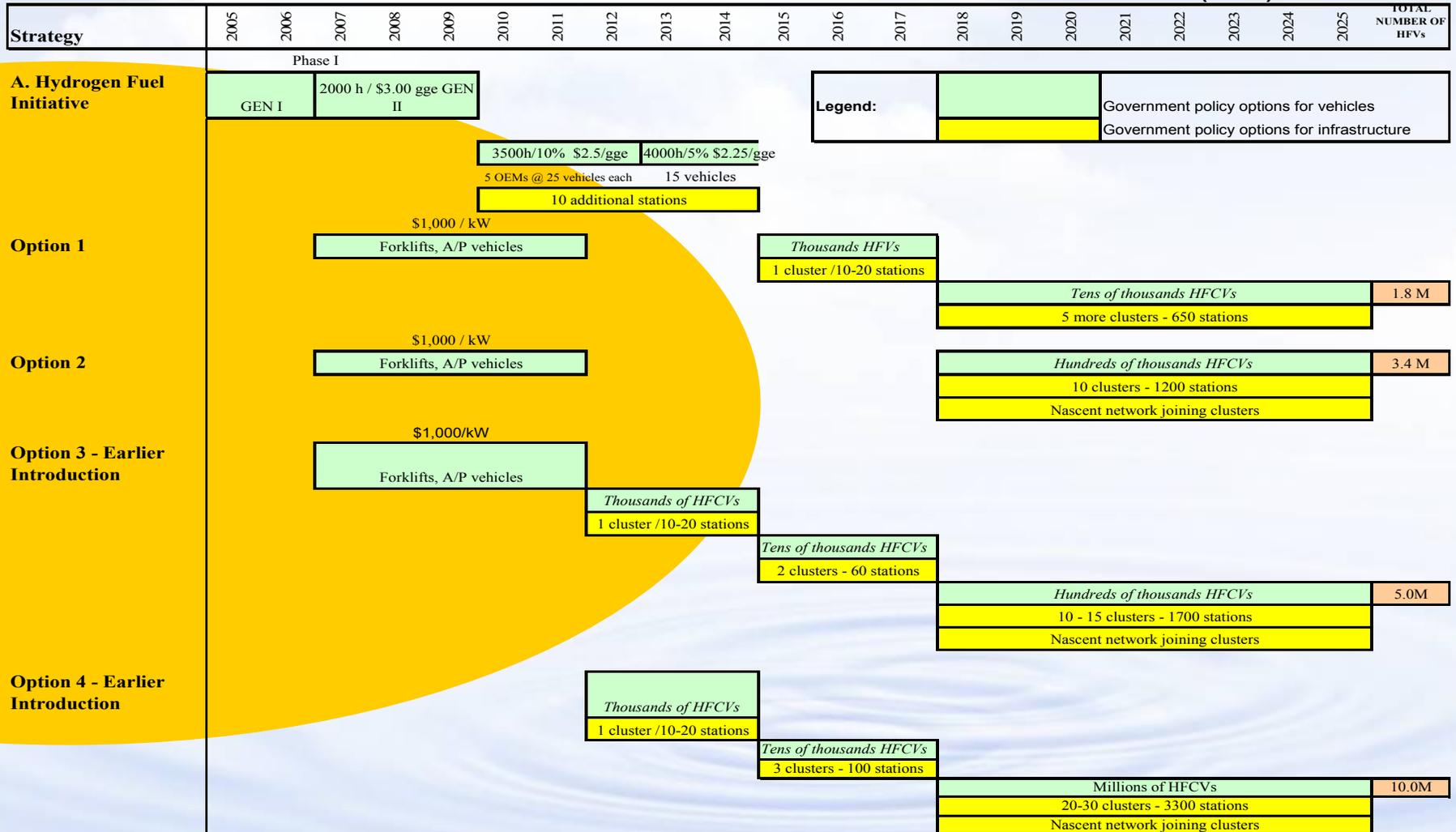
Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
Option 1				5	5	5	60	60	100	200	200	240	500	500	1.8M
Option 2				5	5	5	200	200	300	400	500	500	600	700	3.4M
Option 3	5	5	5	60	60	60	200	300	400	500	600	700	1000	1100	5.0M
Option 4	5	5	5	60	100	150	300	500	750	1000	1200	1500	2000	2500	10.0M

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# Strategies to introduce HFVs

STRATEGY FOR THE INTRODUCTION OF HYDROGEN-FUELED VEHICLES (HFVs)



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# Discussion Topics

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- Validate fuel cell systems in 2012 prior to policy actions
- Implementation of 2012-2020 strategy
- International or national programs
- From fleets to private sector penetrations
- Stranded resources
- Future communication
- Other