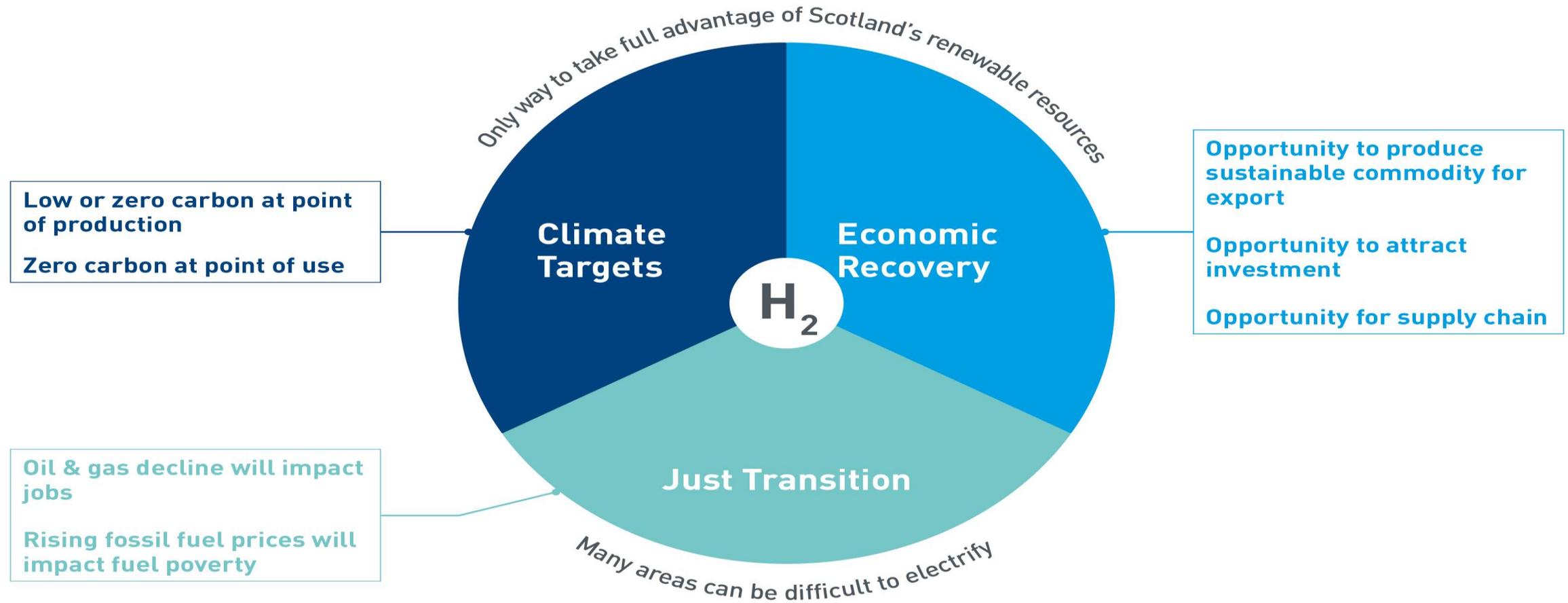


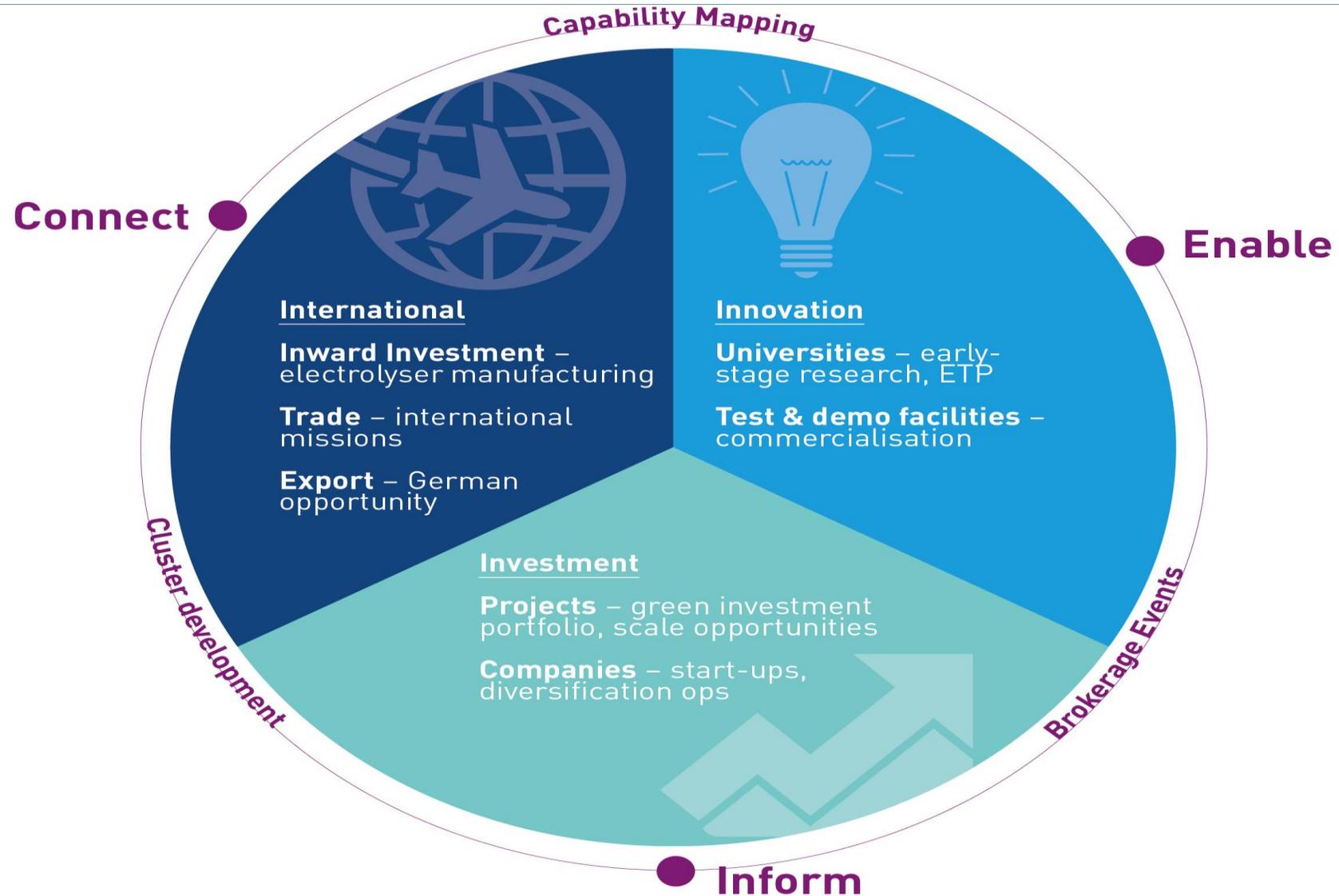
# Scottish Hydrogen Supply Chain Opportunities

Jamie Robinson  
Hydrogen Specialist  
Scottish Enterprise

## Why hydrogen?

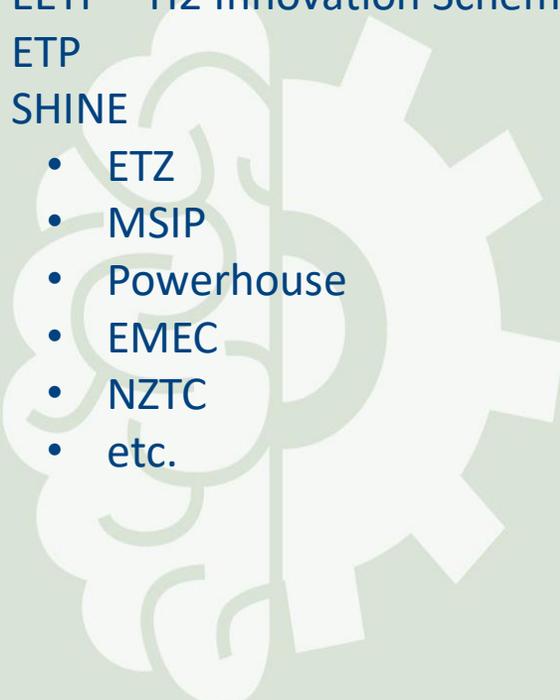


## Why Scottish Enterprise?



## Scottish Enterprise Hydrogen Programme

### Innovation

- Demonstrators
  - EETF – H2 Innovation Scheme
  - ETP
  - SHINE
    - ETZ
    - MSIP
    - Powerhouse
    - EMEC
    - NZTC
    - etc.
- 

### Investment

- Production site reports
    - Large site requirements
    - Distributed production
  - Demand reports
    - Transport
    - Industry
    - Distilleries
  - Project pipeline
  - Green Investment Portfolio
- 

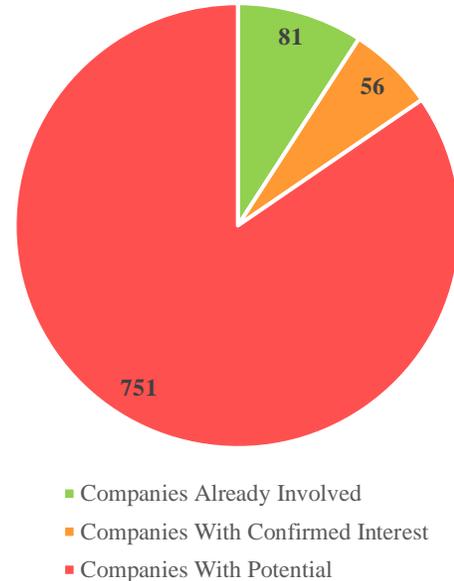
### International

- Inward Investment
    - Electrolyser Manufacturer
    - Large scale developers
  - International trade
    - Trade shows
    - UAE Report
  - Export
    - Scot2Ger
    - Inward delegations
- 

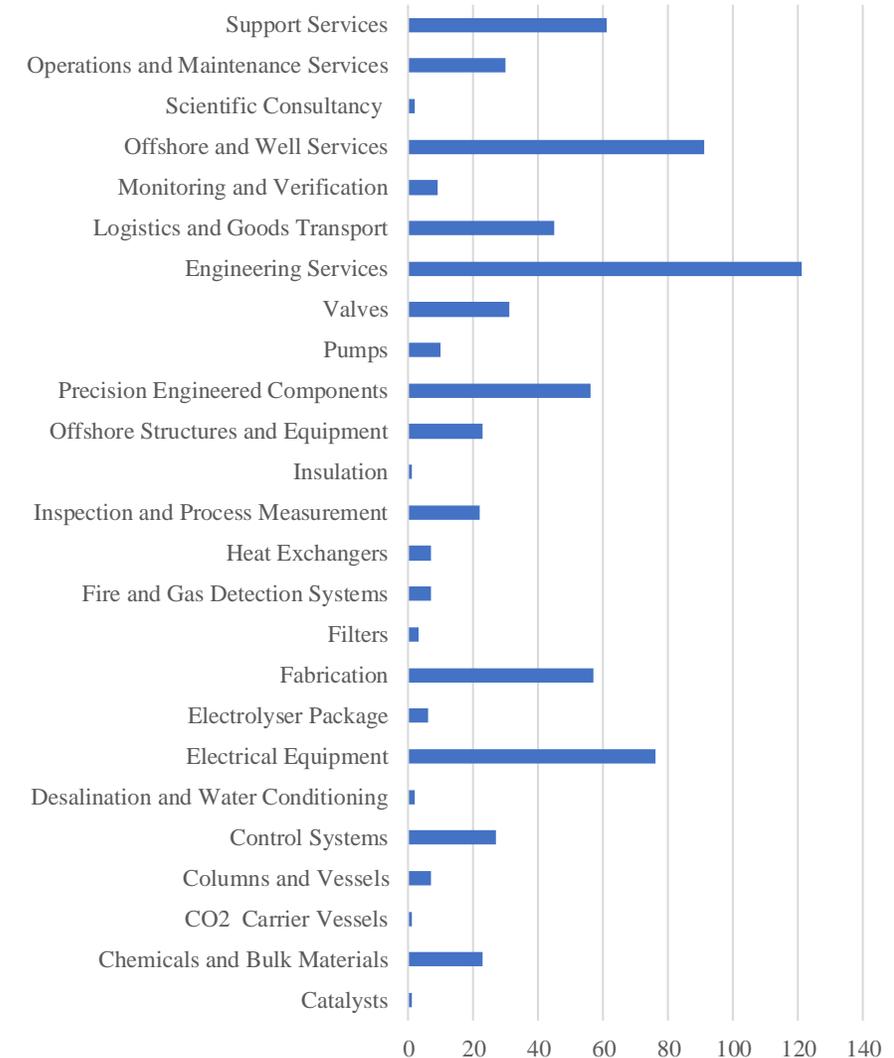
## Hydrogen Supply Chain

- Supply Chain Mapping
  - 888 companies so far
  - Aim to publish database
  - Understand how to best support companies
- Hydrogen supply chain cluster
- What is the opportunity?
  - What components and services are required?
  - How many?
  - When?
- ARUP/SG Electrolyser study
  - Components well known to Scottish companies
  - *“A strong oil and gas and offshore industry, which includes manufacturers, a skilled workforce and established supply chains”*

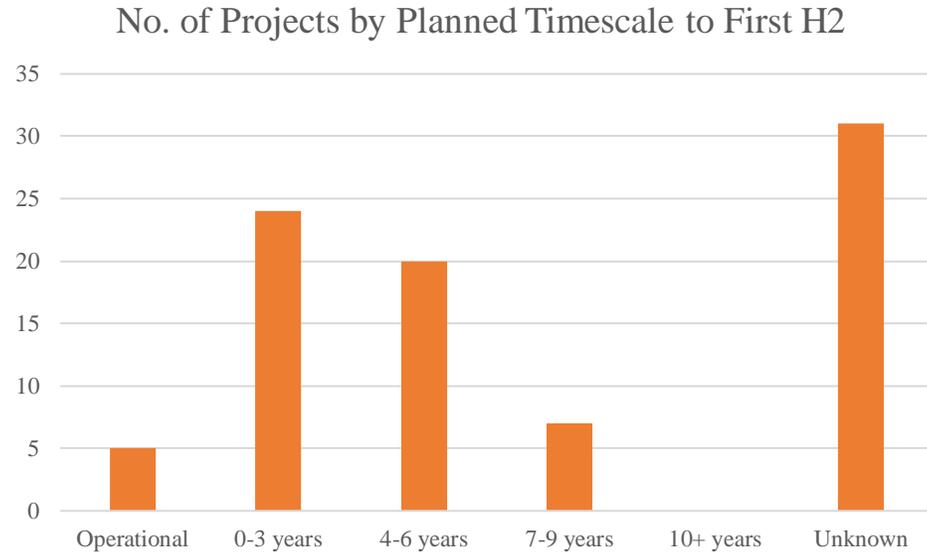
Potential Scottish Hydrogen Supply Chain



Company Capabilities



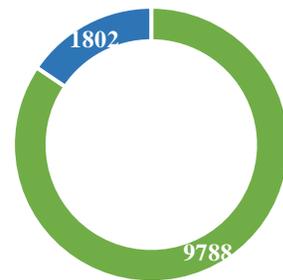
## Scottish hydrogen project pipeline



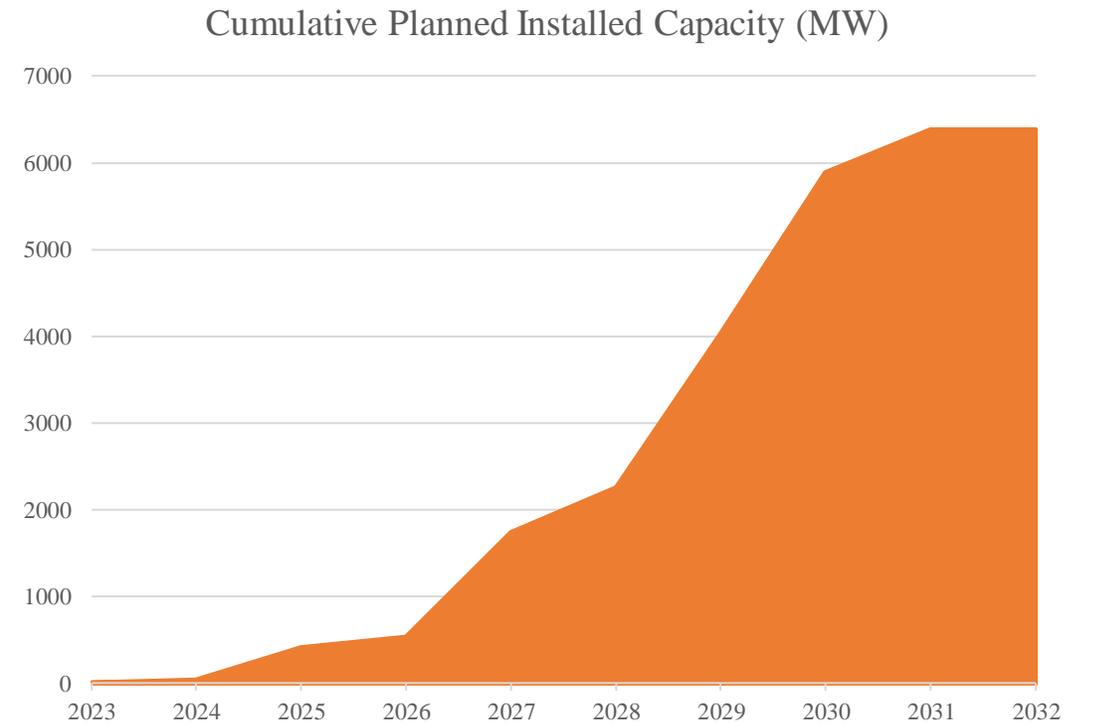
66 with known scale, totalling >11.5GW

87 hydrogen production projects in planning (and counting)

Known Planned Capacity (MW)



■ Electrolytic ■ Low Carbon



## Team Scotland Hydrogen Support



**Scottish Enterprise**

**SOUTH of SCOTLAND ENTERPRISE**

**HIE**  
Highlands and Islands Enterprise  
Iomairt na Gàidhealtachd 's nan Eilean

**Skills Development Scotland**

**energy skills partnership**  
powering the future

**SMAS**  
Scottish Manufacturing Advisory Service

**NMIS**  
National Manufacturing Institute of Scotland

**Technology Partnership**

**Scottish Hydrogen Innovation Network (SHINE)**

**ETZ**  
ENERGY TRANSITION ZONE

**SCOTTISH Hydrogen & Fuel Cell ASSOCIATION**

**SCOTTISH DEVELOPMENT INTERNATIONAL**

**MICHELIN-SCOTLAND INNOVATION PARC**

**Scottish Government**  
Riaghaltas na h-Alba

**Scottish Hydrogen Supply Chain Cluster**

## Scottish Enterprise Hydrogen Expert Support

- New product from SE
- 2 days free consultancy, possible 4 additional days at 50%
- Open to all companies in the SE area
- Targeting companies that...
  - think they have something to offer to the hydrogen space and want to know how to get into the market
  - are already in the hydrogen space and want to grow in that market
- Experts will sit down with you, understand what you do and provide a tailored report with market insights and advice on next steps
- Tell us why you need & want the support, and the impact you think it could have

<https://www.scottish-enterprise.com/support-for-businesses/business-development-and-advice/business-sustainability/hydrogen-expert-support>

### Hydrogen expert support

We offer hydrogen expert support to companies that want to grow by moving into the emerging hydrogen sector. Our industry specialists can help your business, no matter its size or type. Get in touch if you're looking to grow and diversify your company in the low carbon energy field.

If you'd like to apply, download an application form and fill it out with your information. You should send the completed form(s) to [enquiries@scotnet.co.uk](mailto:enquiries@scotnet.co.uk)

[Download an application form \(Word, 86KB\)](#)

### About hydrogen expert support

The aim of this service is to help Scottish businesses move into the growing hydrogen sector.

Our experts can help you to:

- Understand if your company's capabilities can be transferred to the hydrogen sector to expand your market
- Understand the potential benefits of turning to hydrogen, such as the ability to maintain or increase your turnover, workforce, and facilities
- Increase your presence and manufacturing capabilities, if already in the hydrogen market, either through market analysis or due diligence on your product or service

### What kind of support is available?

The hydrogen expert support service is offered over two levels.

#### Level one

This level includes two days of free consultancy. Our consultant will learn about your company's operations, capabilities, and ambitions to create a report that describes your general hydrogen opportunities.

This will include insights that may be of interest to your company and some initial thoughts on specific areas your company could focus on.

# Thanks for your attention

Jamie Robinson

Hydrogen Specialist – Scottish Enterprise

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Scottish Development International | [www.sdi.co.uk](http://www.sdi.co.uk)

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