



# Shaping the global energy transition

**H2Global: Bringing the clean H2 market to fruition**

November 2025



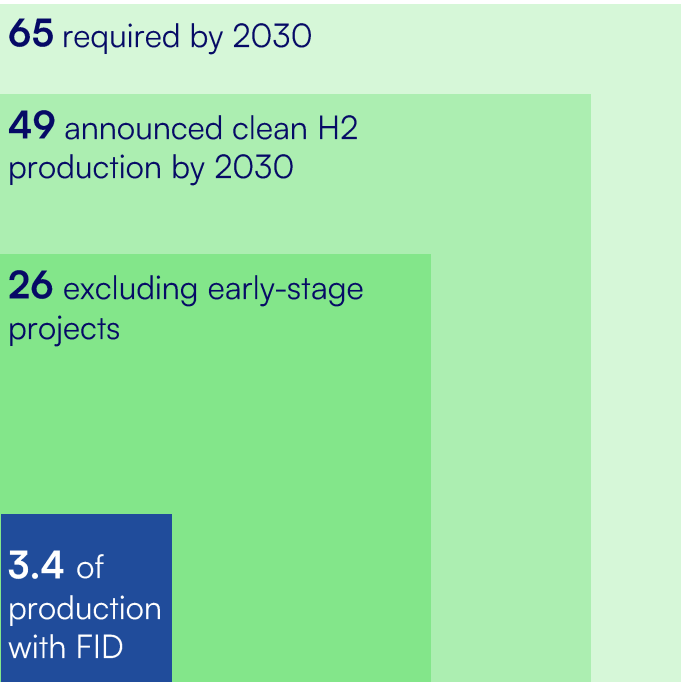
# Clean hydrogen: targets and ambition vs reality

## Electrolyzer capacity (GW)



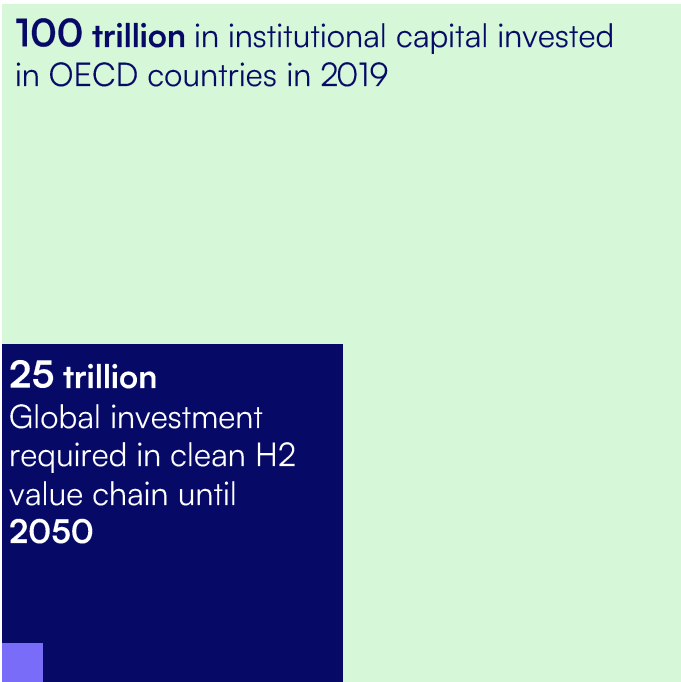
IEA 2024

## Clean H2 quantity (Mtpa)



IEA 2024

## Investment & subsidy (USD)



OECD 2021; OECD, World Bank 2024

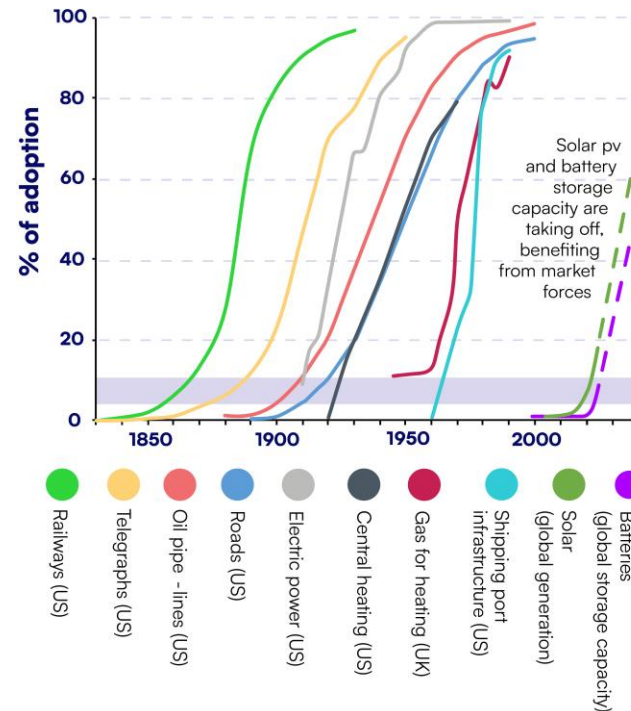
# The importance of reaching tipping points

When markets reach a tipping point, **market forces** lead to **exponential adoption** thereafter.

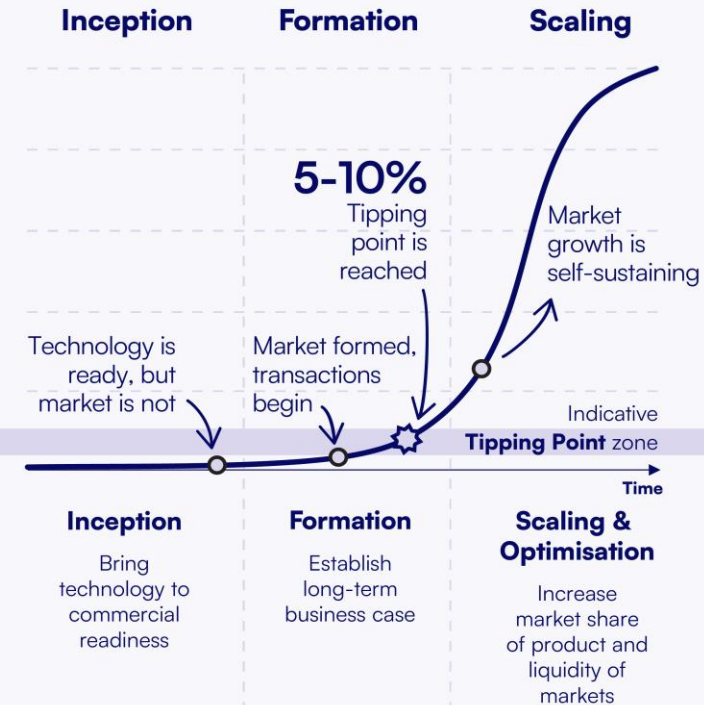
Tipping points in terms of market deployment are usually reached at **5-10%** market share.

## S-curve deployment of new technologies: historical examples and typical stages

The historical adoption of a sample of infrastructure and energy systems



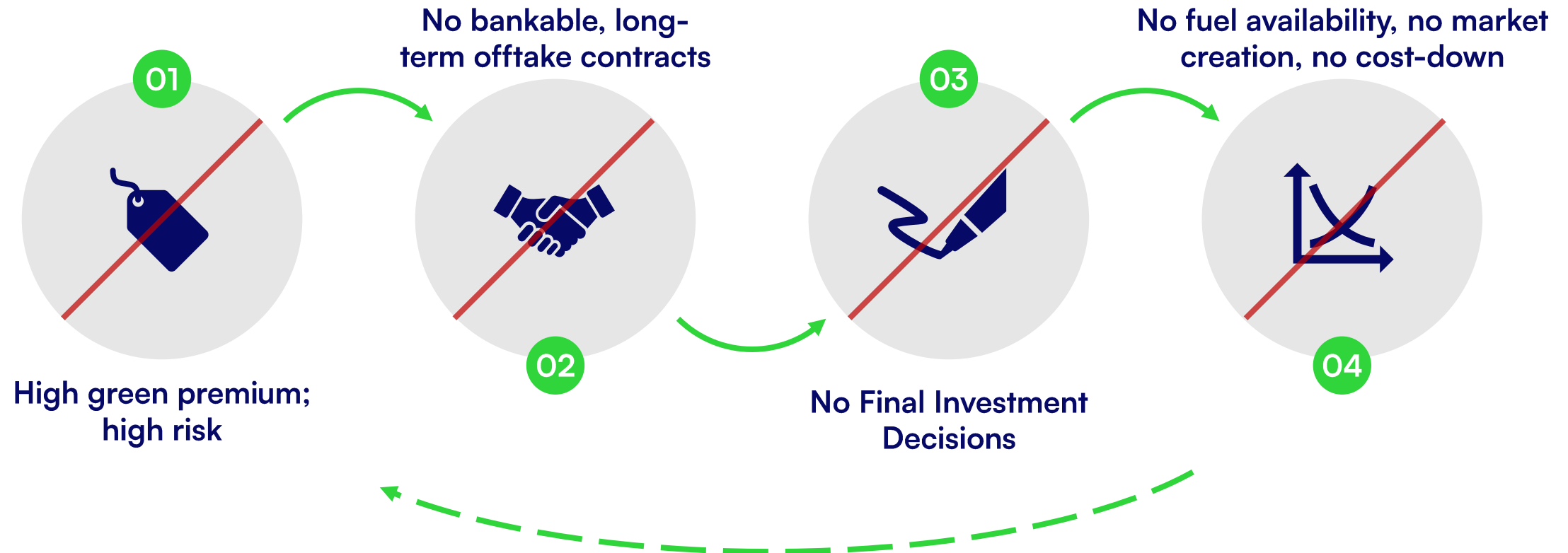
### Stages in market formation and scale-up



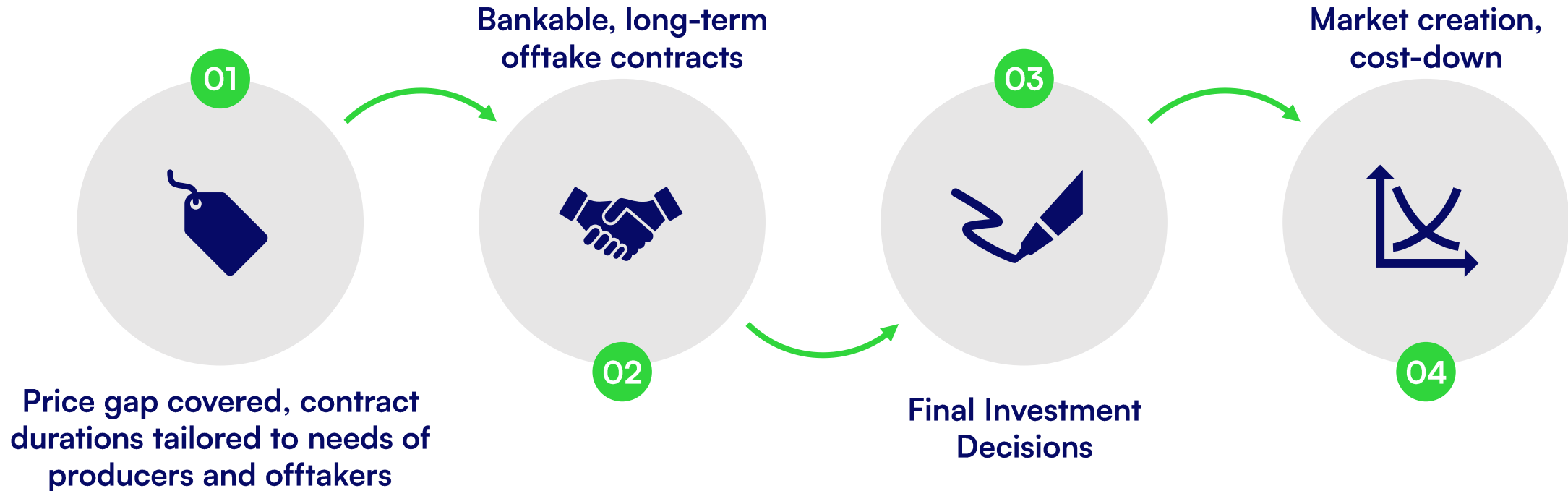
### KEY TAKEAWAY

Green industry could benefit from these **self-reinforcing market forces** if nudged toward tipping points.

# For clean hydrogen to become a viable business, a smart and efficient instrument is needed to bridge the market failure

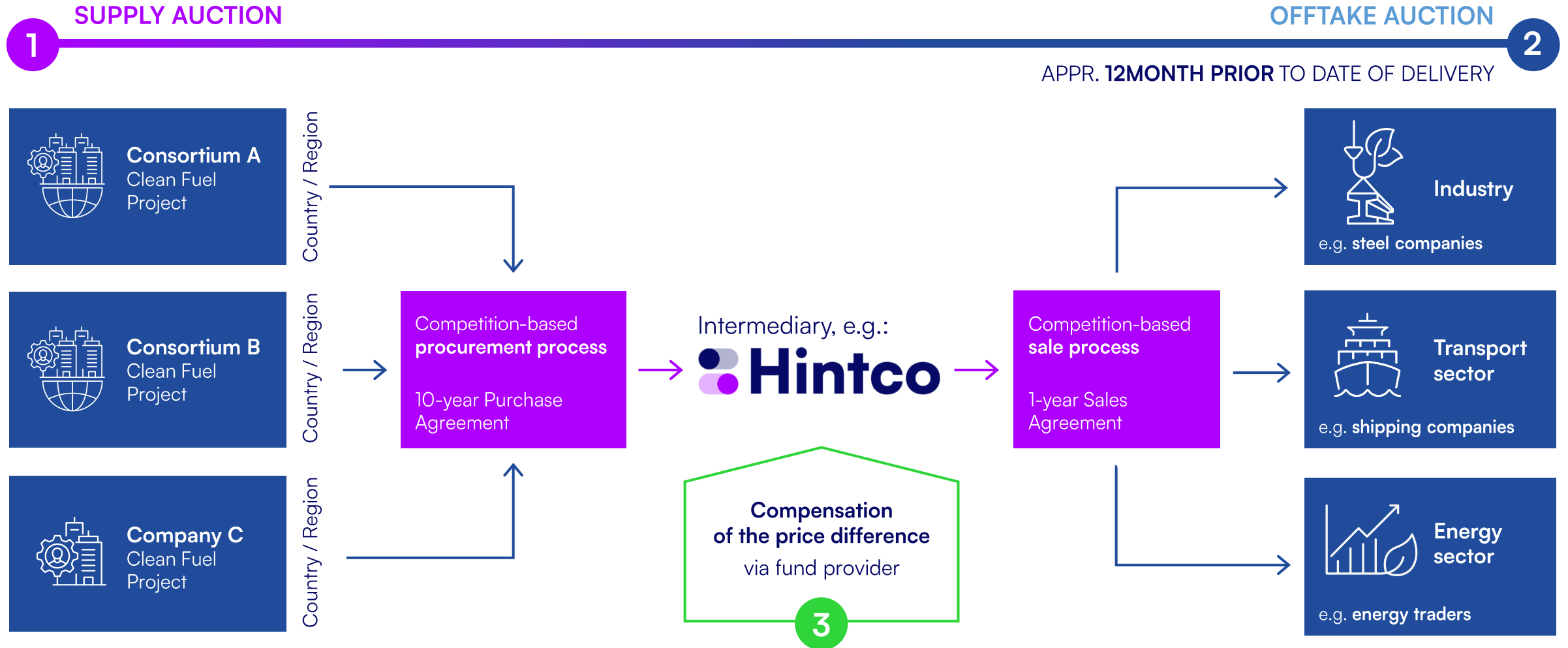


# H2Global's double auction mechanism resolves fundamental market failures, with the aim to accelerate the emergence of liquid markets.



H2Global's double auction mechanism can unleash market forces, alongside other market interventions (e.g., mandates).

# Our solution — The H2Global's double auction mechanism in a nutshell



# H2Global's double auction mechanism solves three fundamental market failures at the same time

1

For producers,  
**it provides long-term  
revenue certainty and gets  
projects to Final  
Investment Decision.**

2

For governments and  
international funding bodies,  
**it minimizes funding needs  
and ensures the 'biggest  
bang for the buck'.**

3

For offtakers,  
**it manages price risk and  
aids price discovery  
towards a liquid market.**



The background image shows a series of wind turbines in a field under a blue sky with some clouds. In the foreground, a large, horizontal, cylindrical metal tank, likely for hydrogen storage, is visible. The tank has a metallic finish and some structural details. A dark blue rectangular box is overlaid on the left side of the image, containing the title text. On the right side, there are some decorative elements: a dark blue circle, a light blue circle, and a green circle, along with some thin lines.

# H2Global: Tenders and international cooperation



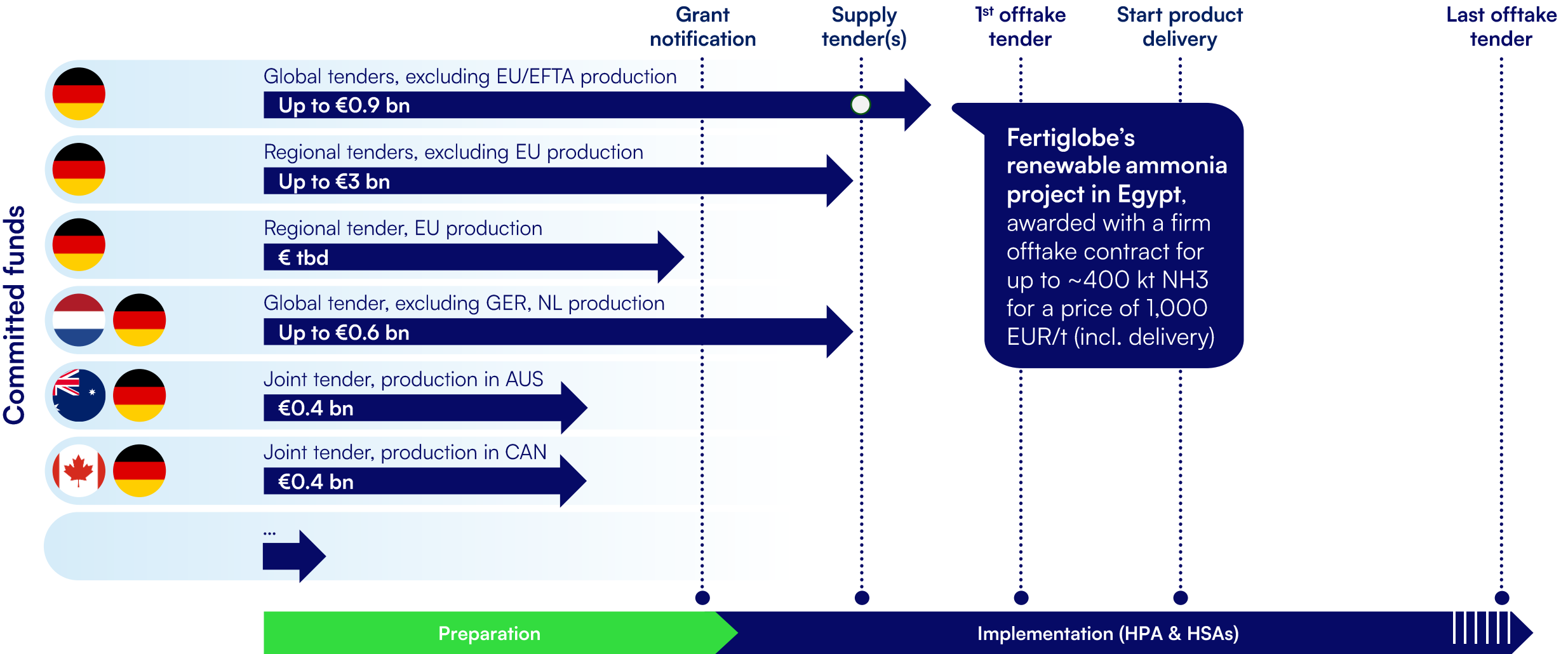
# Fund providers can decide how they want to support the intermediary (e.g., Hintco) and jointly develop the auction configuration from a menu of options

Auction configurator: Non-exhaustive list of illustrative options

Supply auction	Geography	National	or	Group of countries/Region	or	Global	or	...
	Duration	10 years	or	11 years	or	12 years	or	...
	Eligible bidders <sup>1</sup>	Hydrogen producers	or	Fuel producers	or	Fuel suppliers	or	...
Offtake auction	Geography	National	or	Group of countries/Region	or	Global	or	...
	Duration	1 year	or	2 years	or	3 years	or	...
	Eligible bidders <sup>1</sup>	Airlines	or	Fuel suppliers	or	Shipping companies	or	...
Product		Hydrogen	or	Ammonia	or	e-SAF	or	...
Sustainability criteria		<xx g CO2e/MJ	or	EU Delegated Acts	or	...	or	...

For each criterium, the fund provider(s) co-develop the auction configuration with the intermediary (e.g., Hintco)

# H2Global tenders' progress

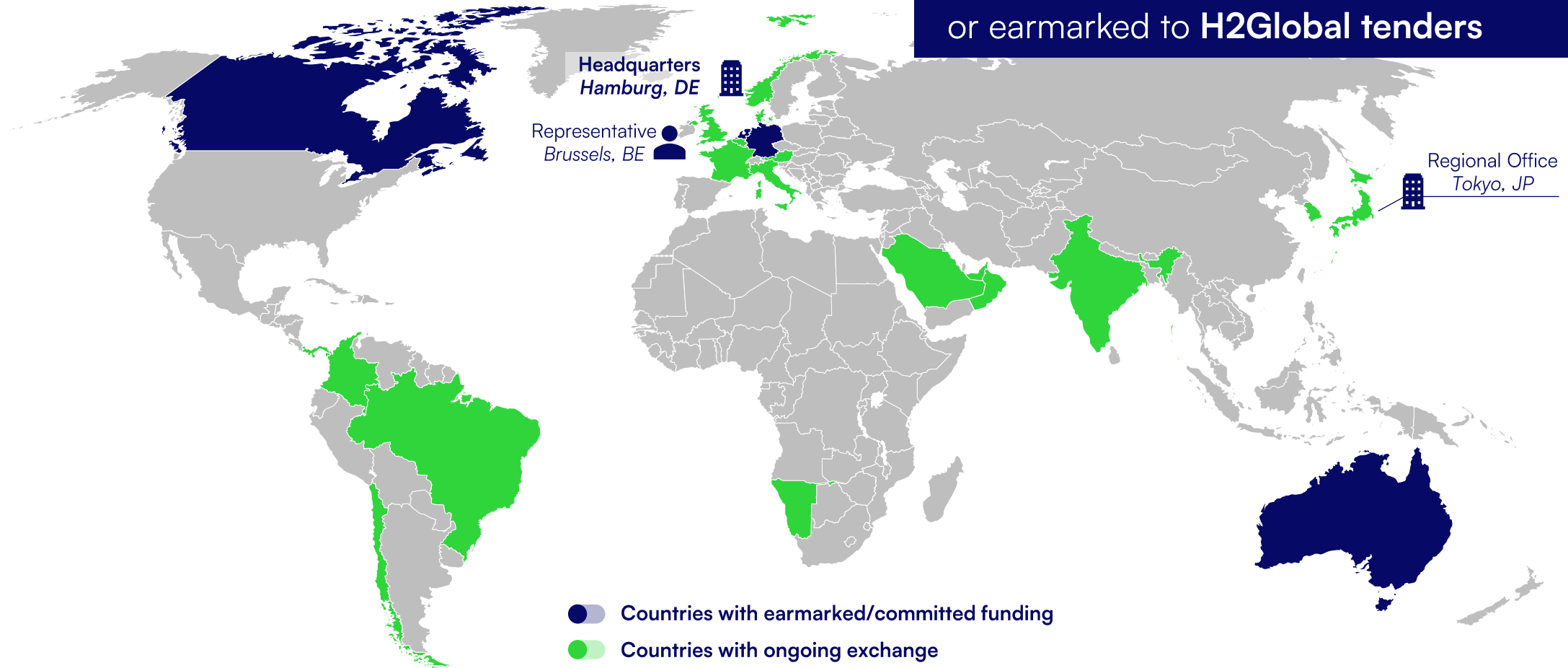


The background image shows a large, silver, cylindrical hydrogen pipeline running horizontally across the frame. In the background, several wind turbines are visible against a blue sky with some clouds. The foreground is a blurred green field. A dark blue rectangular box is overlaid on the left side of the image, containing the text 'H2Global: About us'. On the right side, there is a graphic element consisting of a dark blue square, a light blue rounded rectangle, and a green rounded rectangle, all arranged vertically and partially enclosed by a dark blue line.

# H2Global: About us

# The H2Global Foundation: not-for-profit, with a global footprint

To date, **USD 6+ billion** have been committed or earmarked to **H2Global tenders**



# About us — The three pillars of the H2Global Foundation

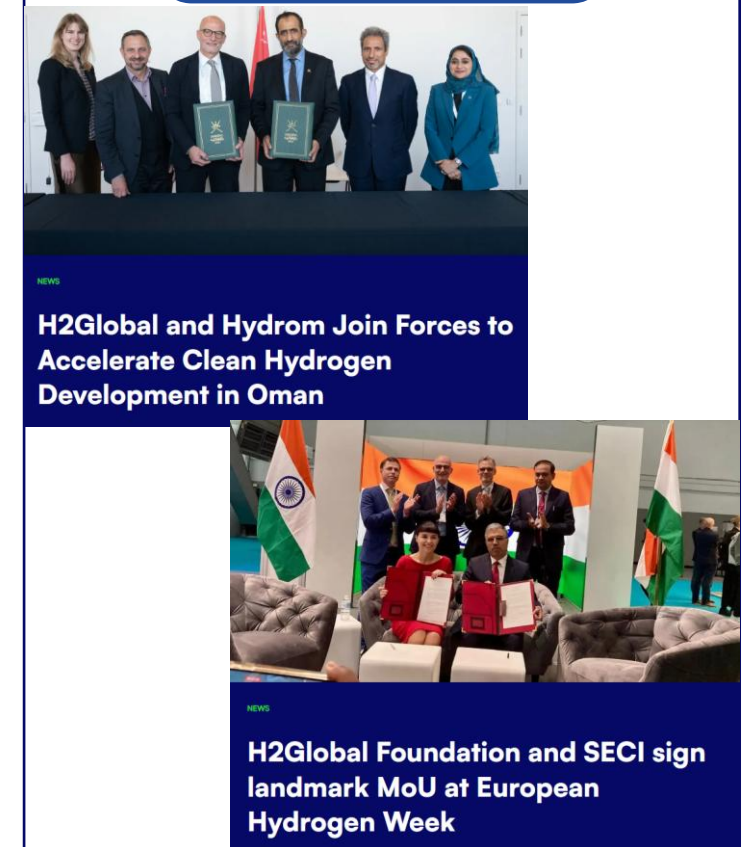
## Research



## Solutions Lab



## Outreach



# To overcome existing market failures in hard-to-abate sectors, we launched the **H2Global Solutions Lab**



- 1 Tailor H2Global's double auction mechanism to hard-to-abate transport** (shipping, aviation, etc..) **and industry** (chemicals, fertilizer, cement, steel, etc.)



- 2 Build on established ties with governments** and other relevant stakeholders **to develop specific use cases** of the tailor-made variations of the H2Global mechanism



- 3 Identify synergies with existing organizations** active in this space such as demand aggregation initiatives



# The two big bets of the H2Global Shipping Initiative



Shipping tender funded by 2-3 national governments serves as proof of concept that the H2Global mechanism can effectively support clean shipping fuels



H2Global's double auction mechanism is considered as potential disbursement tool for the estimated USD 10+ bn p.a. revenues of the IMO Net-Zero Fund

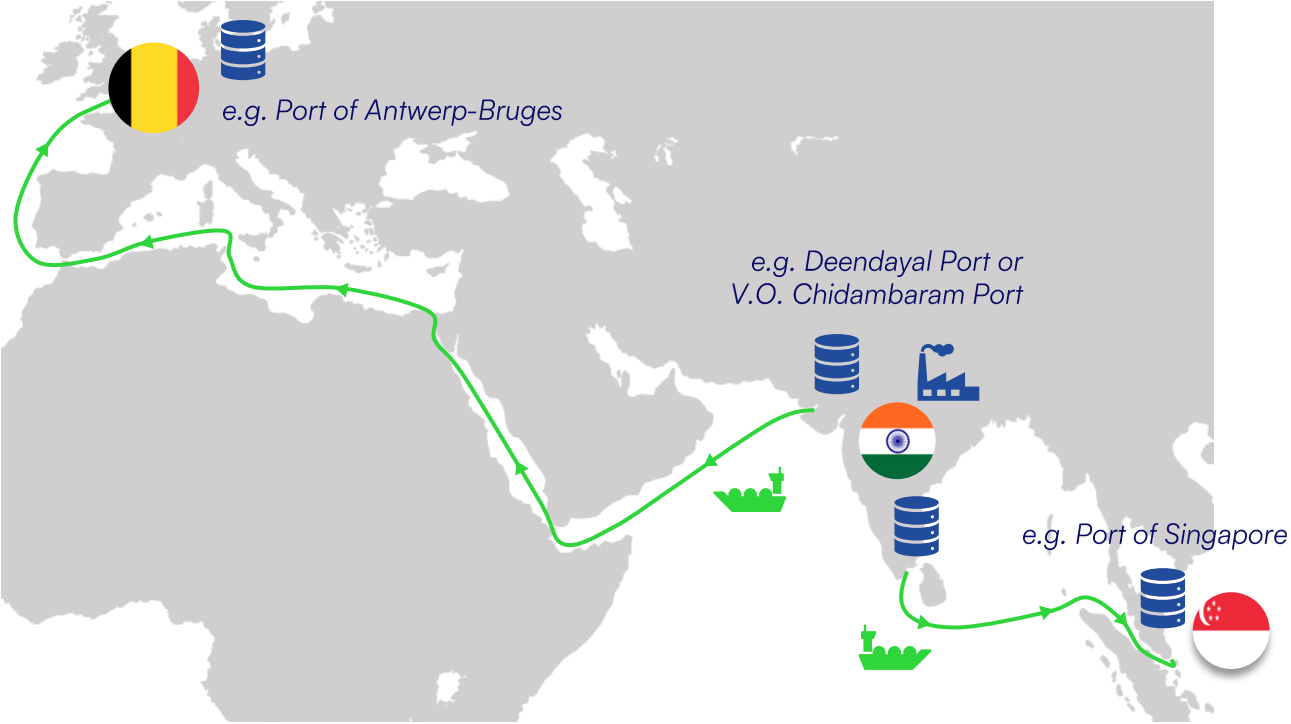


# Illustrative examples of H2GSI's two big bets

#1

Shipping tender funded by national governments, enabling the success of a Green Shipping Corridor

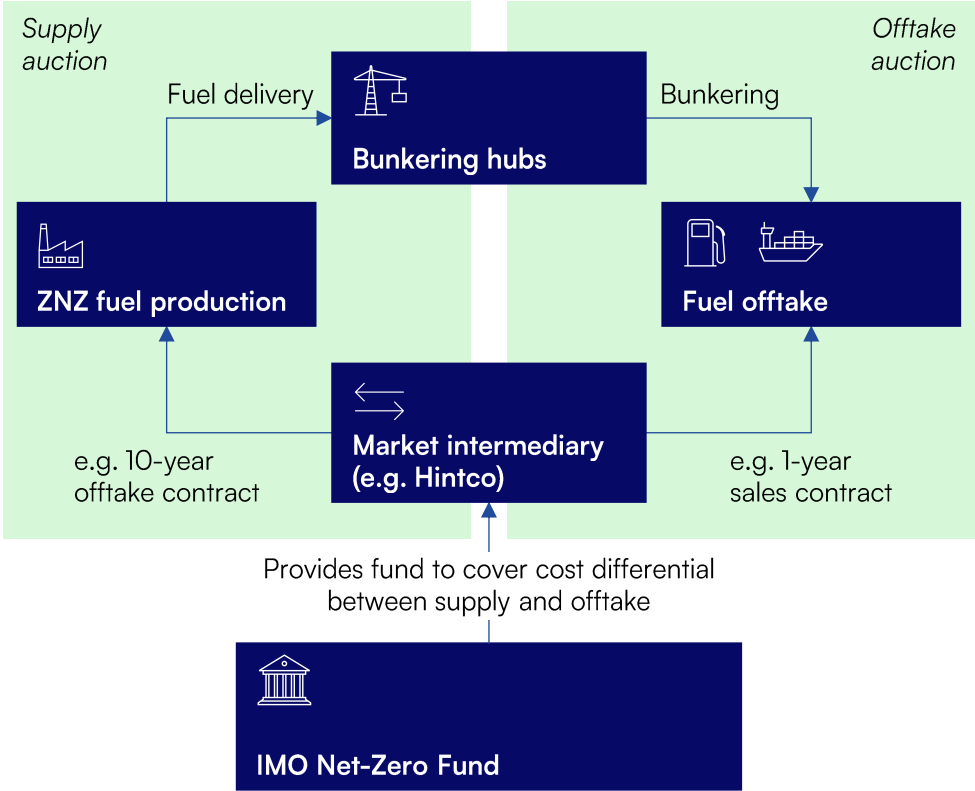
Illustrative example



#2

H2Global mechanism considered as disbursement tool of the IMO Net-Zero Fund

Illustrative example





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