



AHC MEMBER VIEWS ON COVID-19: SURVEY FINDINGS

AUSTRALIAN HYDROGEN COUNCIL

MAY 2020

THE AUSTRALIAN HYDROGEN COUNCIL

Who we are

We are energy and technology companies, vehicle manufacturers and infrastructure providers with interests across the hydrogen value chain.

Our vision

A hydrogen economy built upon clean and renewable energy technology.

What AHC does

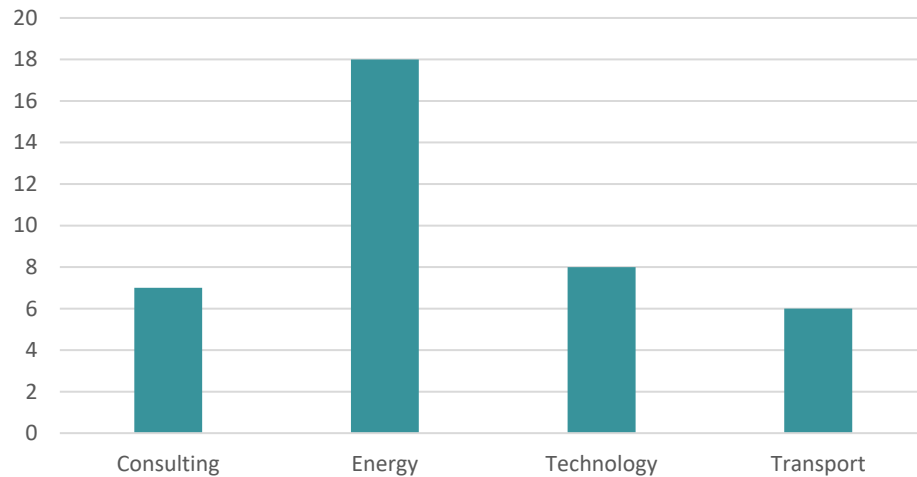
We connect the hydrogen industry and its stakeholders in building a secure, clean and resilient energy future based on hydrogen.

AHC MEMBERS

- As of May 2020, AHC has 39 members
 - All are companies
 - Range of sizes and locations
 - Half are in energy, with other main categories of technology, transport and consulting.



AHC members by sector



AHC COVID-19 SURVEY RESULTS

Survey takeaway

- 83% of respondents (43) said their business is affected by COVID-19
- Just under half of these say their business is affected a great deal

ANSWER CHOICES	RESPONSES	
No	5.77%	3
Not yet, but will if this continues	11.54%	6
Yes, but not much or unclear	46.15%	24
Yes, a great deal	36.54%	19
Not sure	0.00%	0
TOTAL		52

Q2: Is your business currently being negatively affected by COVID-19?

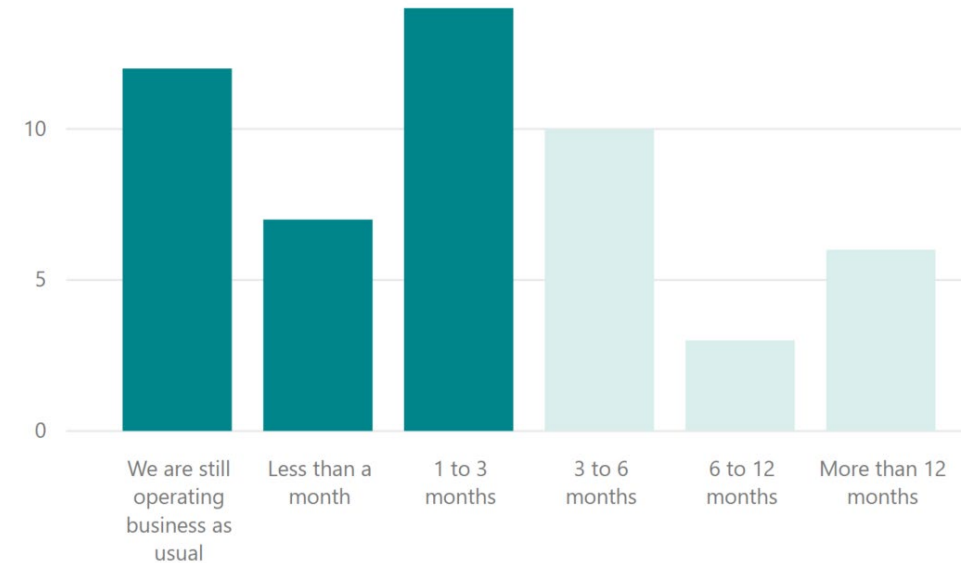


AHC COVID-19 SURVEY RESULTS

Survey takeaway

- 63% of respondents (33) said their business would be back to pre-COVID status within 3 months
- But almost 12% estimate over 12 months to recover

Q3: If COVID-19 were to end today, how long would you estimate it would take for your business to get back to business as usual?



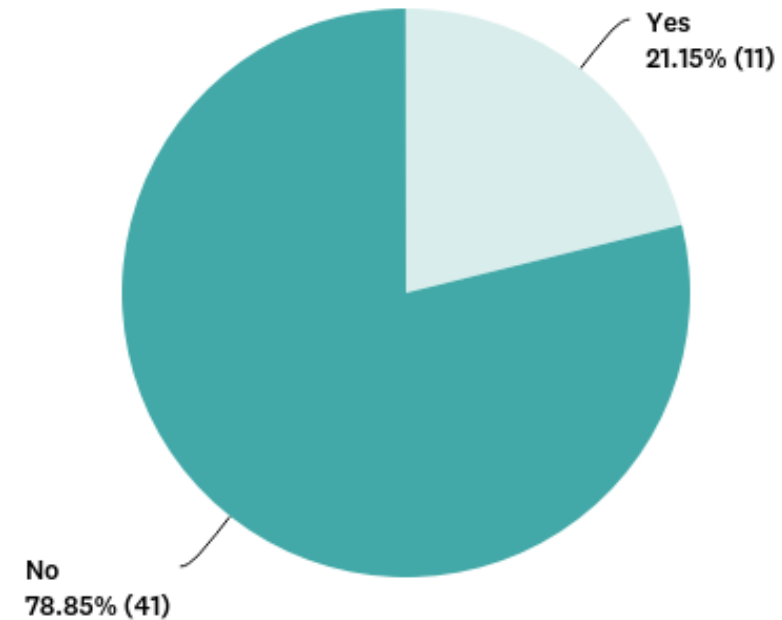
ANSWER CHOICES	RESPONSES	
Still BAU	23.08%	12
Less than a month	13.46%	7
1 to 3 months	26.92%	14
3 to 6 months	19.23%	10
6 to 12 months	5.77%	3
More than 12 months	11.54%	6
TOTAL		52

AHC COVID-19 SURVEY RESULTS

Survey takeaway

- Almost 80% of respondents advised that their hydrogen strategy has **not** been **affected** by COVID-19
- This is despite the effects of COVID-19 on their business overall

Q4: Is COVID-19 negatively affecting your hydrogen strategy?

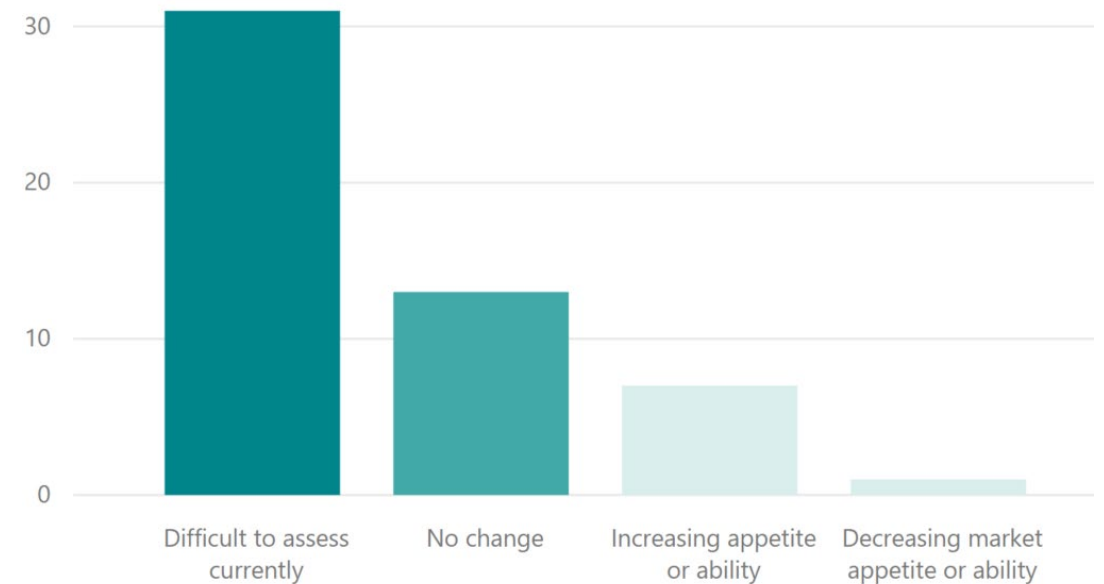


AHC COVID-19 SURVEY RESULTS

Survey takeaway

- A negligible number of respondents said their capacity to deliver current hydrogen projects had reduced
- But 60% of respondents did say it was difficult to assess
- A quarter of respondents advised there was no change to their capacity to deliver current hydrogen projects

Q5: How is COVID-19 affecting your capacity to deliver current hydrogen projects?

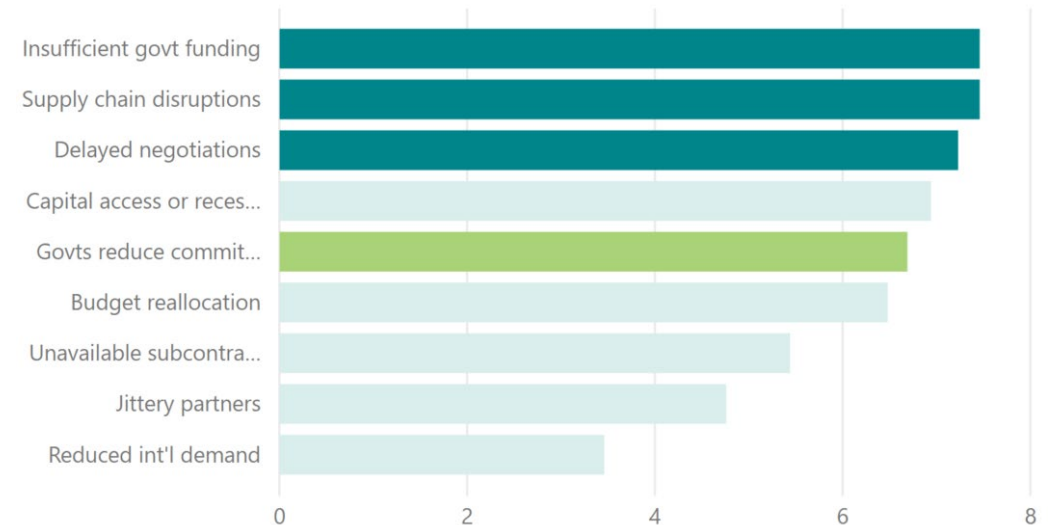


AHC COVID-19 SURVEY RESULTS

Survey takeaway

- Respondents were asked to rank their top 3 concerns from a list
- On a weighted basis, the top concerns related to **government funding** and business matters with **contract negotiations** and **supply disruptions**
- Respondents were also concerned about governments **reducing their commitment** to hydrogen
- Most respondents (87%) reported their concerns about their top three issues had increased compared with pre-COVID-19, with 78% of these having somewhat higher concerns
- Looking at just the top concern for each respondent, it was the economy that was most concerning for all

Q6: What are your top 3 concerns with respect to COVID-19 and your hydrogen business?

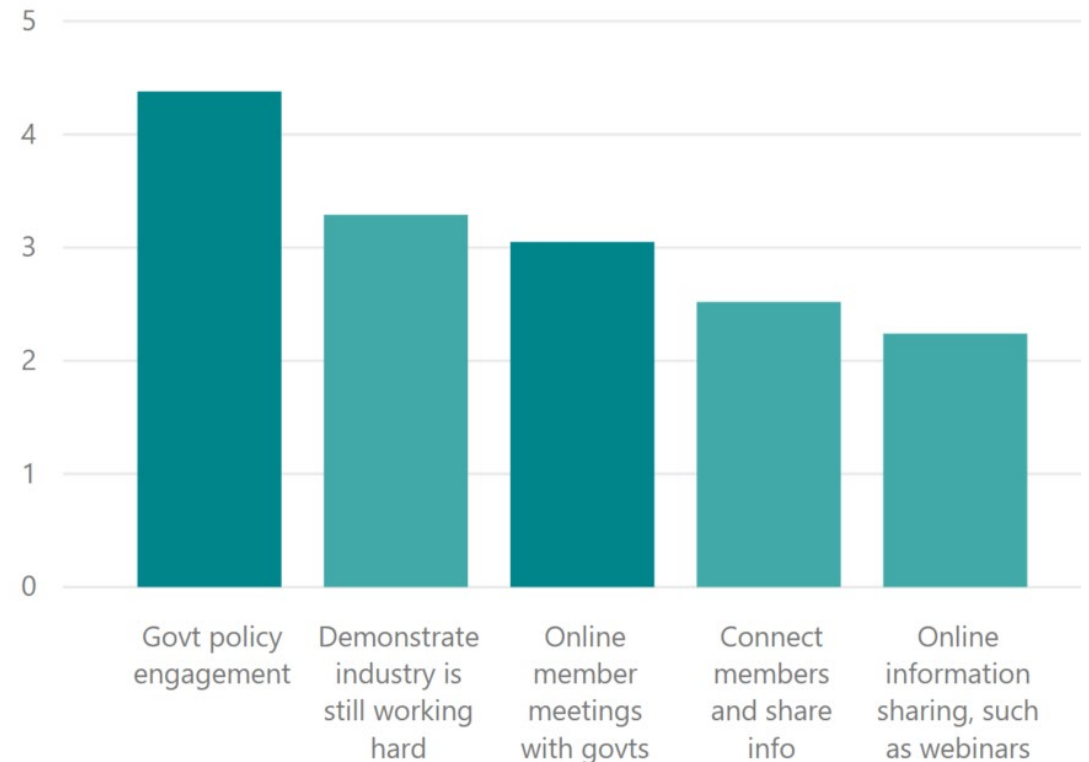


AHC COVID-19 SURVEY RESULTS

Survey takeaway

- Respondents ranked **engagement with governments** on policy as the top AHC priority
- Combined with **online meetings with governments** (number 3 priority) we can see government engagement is the key activity
- It is also vital we communicate to our stakeholders that the industry is still working hard and open for business

Q8: What should AHC prioritise to support your hydrogen business at this time? Please rank your responses where 1 is the most important action for AHC to take.





END

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