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Daimler
GM
Honda
Hyundai
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Toyota
Volkswagen
Automotive Fuel Cell Cooperation

Cal/EPA Air Resources Board
California Energy Commission
Office of Governor Edmund G. Brown Jr.
South Coast AQMD
U.S. Department of Energy
U.S. Environmental Protection Agency

Hydrogenics
ITM Power
Linde North America, Inc.
NREL
Sandia National Laboratories
Southern California Gas Company
SunLine Transit Agency
University of California, Berkeley
UC Davis-ITS
UC Irvine-NFCRC
US Hybrid

AC Transit
Air Liquide
BAE Systems
Ballard Power Systems
Bay Area Air Quality Management District
CALSTART
CalState LA
CA Dept of Food and Agriculture
CTE
CEERT
Energy Independence Now
FirstElement Fuel, Inc.

June 11, 2015

Dear Hydrogen Infrastructure Stakeholders,

As fuel cell electric vehicles (FCEV) and hydrogen stations enter the initial phase of a commercial market, CaFCP members continue to undertake tasks to support the deployment and planning of the initial station network. CaFCP and its members believe this early coordination is vital so early FCEV customers are able to use their vehicles as they would a conventional vehicle and, in doing so, infrastructure providers are well-positioned to take advantage of these early markets. With this in mind, the CaFCP automaker members came together to assess hydrogen station network development and offer near-term recommendations on regional priorities.

As the California Air Resources Board and California Energy Commission begin their planning efforts for the next phase of hydrogen fueling network development, the intent of this initiative was to create a strategic opportunity to help guide the coordinated efforts of station developers and government planners with those of the anticipated commercial market needs of early market FCEV customers.

At the request of CaFCP's automaker members, we are making the following letter available to the public.

Sincerely,

Bill Elrick,
Executive Director
California Fuel Cell Partnership

June 11, 2015

Re: 2015 OEM Priority Hydrogen Station Location Recommendations

Dear Hydrogen Infrastructure Stakeholders,

In support of the efforts by the California Air Resources Board (CARB) to incorporate automobile original equipment manufacturers (OEM) input into the forthcoming June 2015 AB-8 report, the CaFCP OEM Advisory Group (OEM AG) members—American Honda, General Motors, Hyundai, Mercedes-Benz, Nissan, Toyota and Volkswagen—have developed a consensus list of recommended station priority locations for the next 19 hydrogen stations to be built in California.

In preparing our recommendations, the undersigned OEMs have worked individually to ascertain station deployment for their own market needs. The data was shared independently in a double-blind process, and then compiled into an aggregate list. The OEM AG then collaboratively reviewed the data in order to refine the cluster and regional infrastructure needs. With these recommendations, the OEM AG worked to satisfy initial fuel cell electric vehicle (FCEV) customer expectations in key deployment regions by optimizing the number and location of stations such that they ensure (a) customer travel-time to the nearest hydrogen station is minimized within a regional market, (b) network coverage is sufficiently robust for inter-market travel, (c) increased network capacity, and (d) creation of redundancy in the network. The recommendations focus on building hydrogen fueling network coverage and redundant capacity throughout the Northern California, Southern California and Central Valley regions. In addition, some recommended priority locations are being fostered as replacements for early “demonstration/research project” hydrogen stations that we anticipate will not be upgraded to full retail operational status.

Knowing that many stakeholders would likely have an interest in reviewing the OEM AG station prioritization list and understanding the OEM perspective in general, we are sharing our consensus view of the market with a broader audience, especially with the hydrogen station developer community. We believe this sort of dialog strengthens the collaborative relationship and sets forth a broad foundation for the hydrogen infrastructure required to commercialize hydrogen and FCEVs. Moreover, the OEM AG feels the future success of commercializing FCEVs depends on our cooperation with infrastructure providers and government organizations like the California Energy Commission (CEC) and CARB, and we take this role very seriously. Hydrogen infrastructure planning between OEMs, station developers and government is critical at this early development stage which demonstrates both our level of commitment and the urgency at hand.

Therefore, the OEM AG recommends the following station location areas for the next phase of California’s hydrogen fueling network development consistent with the published document

California Road Map: The Commercialization of Hydrogen Fuel Cell Vehicles (2012) and the subsequent Roadmap update *Hydrogen Progress, Priorities and Opportunities* (2014).

Primary Priority*	Secondary Priority*
Berkeley/Richmond/Oakland Beverly Hills/Westwood Fremont Lebec** Manhattan Beach Sacramento San Diego #2 San Diego #3 San Francisco Thousand Oaks/Agoura Hills Torrance/Palos Verdes	Culver City Dublin/Pleasanton Encino/Sherman Oaks/ Van Nuys Granada Hills Irvine South Los Banos** Palm Springs Ventura/Oxnard

* The locations are listed in alphabetical order and not ranked within the priority lists.

** These two locations will further strengthen the I-5 corridor

These priority locations represent general geographic areas that the OEM AG suggests be considered by CARB, station developers and CEC in planning the next phase of hydrogen station network development in California. The recommendations are considered preliminary and are expected to be further refined through subsequent analysis and further consultation with stakeholders prior to future solicitations.

Should you or your organization want to better understand these recommendations, or discuss the market viability of specific station projects, please do not hesitate to contact us.

Sincerely,

American Honda Motor Company, Inc.

General Motors LLC

Hyundai-Kia America Technical Center, Inc.

Mercedes-Benz Research & Development North America, Inc.

Nissan Technical Center North America

Toyota Motor Engineering & Manufacturing North America, Inc.

Volkswagen Group of America, Inc.