

Agenda

- 1 NREL at-a-Glance
- 2 Challenges and Opportunities: Industrial Decarbonization
- 3 Collaboration and Partnerships: Highlights Across the Lab
- 4 Innovation and Entrepreneurship Center
- 5 Campus Expansions & Integrated Industry Partnerships
- 6 Summary

History of the National Renewable Energy Laboratory

The Solar Energy Research,
Development, and
Demonstration Act of
1974, signed into law by
President Jimmy Carter,
established the Solar
Energy Institute (SERI).



- October 1973: Oil embargo drives up gas prices
- October 1974: Solar Energy Research, Development, and Demonstration Act signed into law
- July 1977: SERI begins operations in leased space
- August 1977: Department of Energy formed
- 1984: First permanent research facility completed on South Table Mountain Campus
- **September 1991**: SERI elevated to national laboratory status
- October 1994: NREL establishes National Wind Technology Center at what is now the Flatirons Campus



Coast to Coast

The 17 national laboratories have served as the leading institutions for scientific innovation in the United States for more than 90 years.

NREL Brings Distinct Capabilities

Foundational Science

Accelerated Technology Scale-Up

Systems

Markets

Bench-Scale Discovery

Scaling R&D and Process Engineering

R&D with Industry Partners



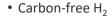
- Solar Energy Research Facility
- Science and Technology Facility
- Field Test Laboratory Building.



Energy Materials and Processing at Scale (Completion FY27)

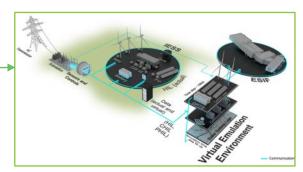


Energy Systems
Integration Facility



- Products from electrochemical processes and CO₂
- Advanced batteries
- PV, wind, water power, geothermal
- New buildings and industrial materials, manufacturing and systems
- Grid and security tech.





Advanced Research on Integrated Energy Systems



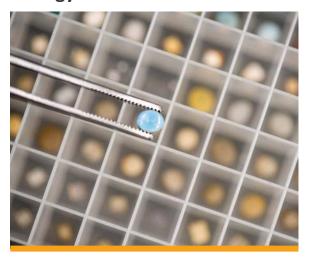
Integrated Energy Pathways



Electrons to Molecules



Circular Economy for Energy Materials



NREL's Vision:

A Clean Energy Future for the World Three critical research areas respond to today's energy challenges and provide tomorrow's solutions.

Integrated Energy Pathways



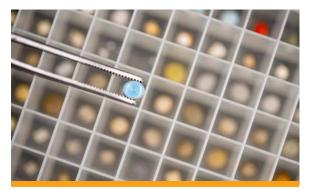
Developing the foundational knowledge and technologies to optimize the integration of renewables, buildings, industry, energy storage, and transportation modernizing our energy systems and ensuring a secure and resilient grid.

Electrons to Molecules



Accelerating the conversion of electricity and small waste gases (e.g., CO₂, H₂O, N₂) into chemical bonds for the purposes of chemical, material, or fuel synthesis and/or energy storage.

Circular Economy for Energy Materials



Establishing the foundational knowledge/technology for design, recycle, reuse, remanufacture, and reliability for energy-relevant materials and processes.

NREL's Three Critical Objectives

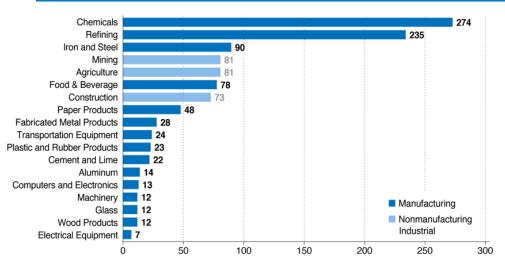




- Requires lowering carbon intensity of electricity generation, substituting electricity for fossil fuels.
- Calls for combination of renewable energy and diverse energy storage.
- Requires new technologies for <u>cement</u>, steel, ammonia, and ethylene industries.



Industrial Decarbonization



Energy-related CO₂ emissions breakdown by industrial subsector in 2020 (Million MT CO₂)

- Industrial sector responsible for 1,360 million metric tons of CO₂ emissions (~30% of total U.S. energy-related emissions).
- Manufacturing accounted for 83%.
- Nonmanufacturing accounted for 17%.

The U.S. industrial sector consists of manufacturing and nonmanufacturing subsectors, with the top three energy-related CO₂-emitting subsectors being chemicals, petroleum refining, and iron and steel.

Manufacturing Subsectors

- Iron and Steel
 - Chemicals
- Food and Beverage
- Petroleum Refining
 - Cement.



Energy Efficiency

- Energy management approaches
- Thermal integration of process heat
- Smart manufacturing
- Improved technologies and processes; systems integration.

Industrial Electrification

- Electrification of process heat (e.g., heat pumps)
- Electrification of hydrogen production for industrial process use
- Grid and on-site generation sources.

Low-Carbon Fuels, Feedstocks, and Energy Sources (LCFFES)

- Fuel-flexible process
- Clean hydrogen fuels and feedstocks
- Biofuels and bio feedstocks
- Concentrating solar power
- Nuclear
- Geothermal.

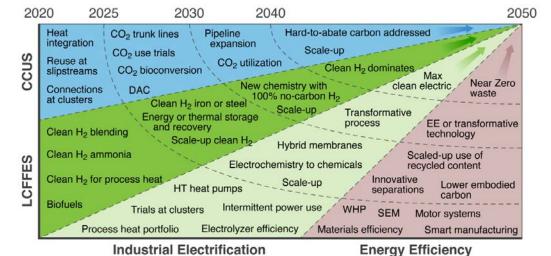
Carbon Capture, Utilization, and Storage (CCUS)

- Post-combustion chemical absorption of CO_2
- CO₂ pipelines and other **CCUS-supportive** infrastructure.

Getting to Net-Zero

Investments are needed in near-, mid-, and long-term timeframes to address numerous RD&D opportunities to accelerate industrial decarbonization by these top pillars.

Strategies need to be pursued to realize synergies within and across pillars and industries.



Landscape of major R&D investment opportunities for industrial decarbonization across all subsectors and decarbonization pillars

- Accelerated shift to low-carbon process technologies
- 100% clean electrical grid
- Ultra-low carbon energy carriers and feedstocks
- Procurement focus on embodied carbon
- Improved material efficiency and transition to circular economy
- Cost-effective carbon capture
- Negative emission technologies.

Supported by lowcarbon procurement, technologies could follow four parallel 'tracks' to decarbonization by 2050

Capital Abatement formation potential by required by Technology 'track' 2050² Pathway to commercial liftoff 2050¹ (illustrative examples, not exhaustive) ~\$5-10B ~30-40% Currently · Clinker substitution Rapid deployment, incentivized by demand deployable · Energy efficiency signal from large buyers and enabled by measures · Alternative fuels accelerated validation of low-carbon blends (subset of approaches: other measures in these categories require further R&D) (B) CCUS · CCUS retrofits and Initial ~3-5 demonstrations Accelerated buildout of CCS, enabled by 45Q, cost reductions, integration into newenabled by 45Q and and coordinated procurement to create investable demand signal build plants government support Alternative _ _ _ _ _ _ _ _ Alternative feedstocks production Initial -3-5 greenfield Accelerated buildout of greenfield plants, enabled by cost · Alternatives to methods reductions and coordinated procurement to create investable demonstration plants traditional rotary kiln (drop-in for enabled by government production traditional cement support products) Alternative Alternative chemistries to Initial market share in non-structural niches Liftoff achieved in broade traditional clinkers chemistries market Testing and validation, updated standards, and market education to enable wider deployment Potential to pull forward timeline with expanded use of Supply chain expands to meet growing demand performance-based standards Emerging technologies, details less clear Ongoing R&D investment to support rollout of key technologies (e.g., novel carbon Applied R&D Earlier-stage novel opportunities on SCMs and binders capture approaches on dilute streams, other novel materials for clinker substitution, improved plant efficiency measures) emerging · Higher-hydrogen fuel blends and technologies Long-term R&D investment in 'next horizon' technologies (e.g., electrification of kiln and electrification precalciner, >20% hydrogen fuel blends) (not in focus for this Alternative CCUS approaches Timeline 2023 2040

Low-carbon cement: Four-track pathway to Liftoff

Liftoff pathway for the cement sector is split across technologies with varying TRLs/ARLs and distinct economic, market, and policy constraints and enablers. Four parallel 'tracks' are outlined for different technology types. Other technologies are on a longer timeline and require continuing R&D investment to achieve demonstration stage and deployment readiness.

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Six key challenges must be overcome to scale technologies

- 1. Uniform standards to define low-carbon materials and enable informed procurement.
- 2. ~10 to 20-year adoption cycle for new blends and materials—both from long lead time needed to update standards and a long customer-adoption cycle.
- 3. Current procurement model is not structured to attract capital at required scale.
- 4. Decarbonization approaches may come with structural cost increases.
- 5. Key technologies have performance and cost uncertainty. Others are at lower TRLs and must make further R&D progress to deploy.
- 6. Projects may lack support from local communities and the public (particularly CCUS projects because of environmental and safety concerns).



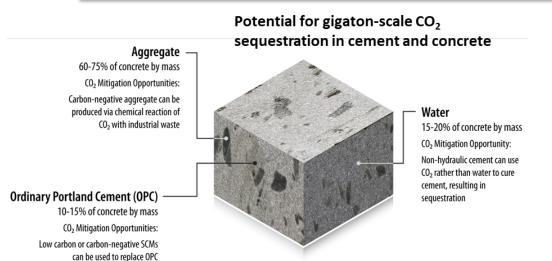
Image by NREL/39565



- 1. Establish shared standards and data ecosystem for low-carbon products.
- 2. Targeted interventions to compress adoption cycle.
- 3. Develop alternative procurement models with firm, long-term offtake commitments
- 4. Policy and market models that offset structural costs.
- 5. Pre-deployment technologies, provide continuing support to accelerate progress
- 6. Implement robust community benefits plans and agreements that respond to public concern, mitigate potential harms, and ensure accountability.



Concrete Has a Large CO₂ Footprint Today, but Could Be Tomorrow's CCUS Solution



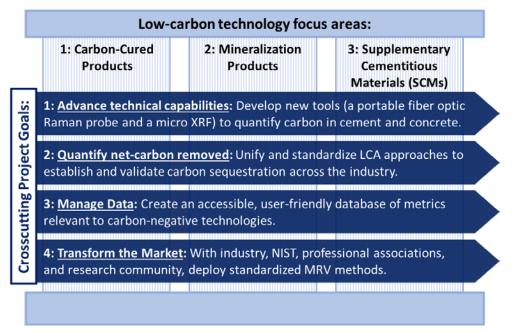
Many stakeholders are pursuing CO₂ sequestration opportunities, including:

- Established industry
- Startups
- Academia
- National laboratories.

There is little consensus on methods for measurement, reporting, and verification (MRV) of CO₂ content sequestered in products.

Standardized MRV methods are needed to ensure robust carbon accounting, build public confidence, increase bankability of technologies, and inform codes and standards of the future.

Our Goal: Standardize MRV Approaches for Low-Carbon Cement and Concrete



NREL is leading a team of national laboratory, industry, and academic partners to standardize MRV.

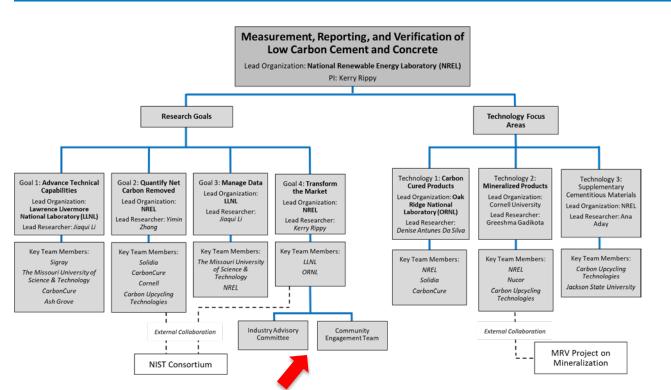
We have identified four goals that will be applied across three technology focus areas.

Members: NREL, Lawrence Livermore National Laboratory, Solida, Oakridge National Laboratory, Carbon Upcycling, Nucor, Sigray, Carbon Cure, Jackson State University, Missouri S&T, Cornell

This project is funded by the DOE Office of Technology Transitions in collaboration with the Office of Clean Energy Demonstrations (OCED) and the Office of Fossil Energy and Carbon Management (FECM).



Our Project Team Is Large but Needs More Support!



We want to collaborate, working closely with all stakeholders to ensure our MRV solutions work for everyone and are widely adopted.

Please contact
Kerry.rippy@nrel.gov if you are interested in supporting this effort!

We welcome you to join our industry advisory committee or our community engagement team!

CO₂ Mineralization Into Construction and Building Materials











ACT4 CO₂ Mineralization Into Enhanced Building Construction Materials:

Industrial processes to manufacture building construction materials (e.g., steel, plastics, cement/concrete) are responsible for significant greenhouse gas (GHG) emissions. The production of cement alone emits 2.3 billion tons of CO_2 per year, accounting for ~8% of human-caused GHG emissions. Clinker substitution (Portland cement [PC] replacement) and CCUS have been identified as the two biggest technology opportunities to decarbonize the cement industry. **NREL** and **Carbon Upcycling Technologies (CUT)** have teamed up to upcycle a variety of low-value byproducts from biomass and industrial sources into advanced supplementary cementitious materials (SCMs) for the cement and concrete industry.

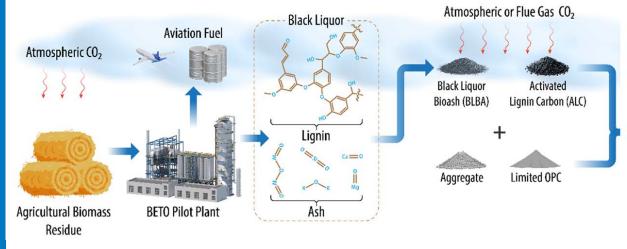
Technology Impact

- This technology combines CCUS and clinker substitution into one solution.
- Unlocks low-value waste products and mineralizable resources that are currently available in North America for use as SCMs.

CO₂ Mineralization Into Construction and Building Materials







ARPA-e Carbon-Negative LignoCrete Summary

NREL has developed a low-carbon concrete mix using two bio-derived SCMs from lignin-rich byproducts of sustainable aviation fuel production. At end of life, this material can be ground and recycled for use as road base or aggregate with no risk of organic matter decomposition and CO₂ secondary release, meeting cradle-to-gate and cradle-to-grave objectives.

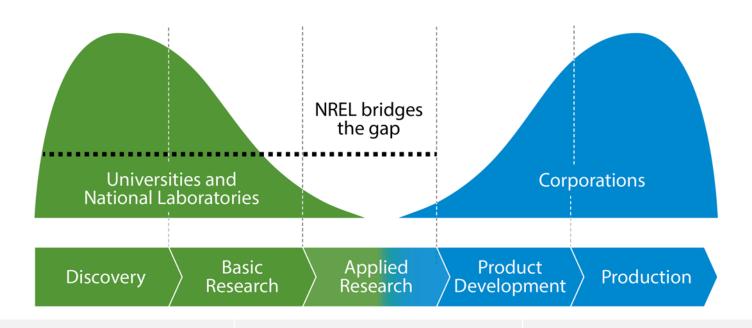
Technology Impact

- Potential to eliminate 20%–60% of U.S. cement related emissions by 2040.
- Can disrupt the traditional cement and concrete industry in the U.S. by displacing ordinary Portland cement (OPC) and heavy industry-based SCMs with low carbon/carbon-negative biobased materials.
- Partners: Carbon Upcycling Technologies, CU Boulder

NREL Lead: Michael.Griffin@nrel.gov; Technical Lead: Ana.Aday@nrel.gov



We Reduce Risk in Bringing Innovations to Market



NREL helps bridge the gap from basic science to commercial application.

Forward-thinking innovation yields disruptive and impactful results to benefit the entire U.S. economy.

Accelerated time to market delivers advantages to American businesses and consumers.

How Can NREL Help Where Industry Can't?

Industry invests in short-term R&D when they are confident about a return on investment.

NREL:

- Assumes a longer, broader view.
- Takes on early-stage, highrisk R&D.
- Conducts research that makes it possible for industry to bring important new solutions to the market.



"It is often too risky for the private sector to be on that bleeding edge of research where profits are years and years away."

Venkatesh Narayanamurti
Professor of Science and Technology Policy
Harvard Kennedy School
Quote from the Washington Post

Partnering With Business for Competitive Advantage





340

new partnership agreements



\$143_M

value of new partnership agreements



more than **1,100** active partnerships with **industry**, **academia**, and **government**



300

unique new partners



767

unique active partners



Building on the C-LEAP Pilot

- The Communities LEAP pilot is delivering technical assistance to 24 communities.
- 24-32 additional communities will be selected for cohort 2.
- Technical assistance is the primary offering through the program, but one or more team members can serve as a subcontractor to DOE's providers & receive up to \$50,000 for services rendered.

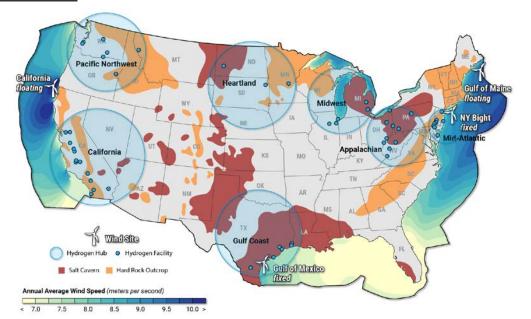


For more information about Communities LEAP Cohort 2, visit our website:

https://www.energy.gov/communitiesLEAP/communities-leap.

Project Goal – Tightly Coupled Systems

Vision: Develop reference designs for GW-scale off-grid, tightly coupled, hybrid energy systems purpose-built for green H₂ production, in close proximity to or co-located with industry end uses, that <u>can accelerate the path to decarbonization for hard to abate</u> industries.



Team effort (lead noted):

Hanna Breunig (LBNL)
Pingping Sun (ANL)
Myra Blaylock (SNL)
Joao Pereira Pinto (ORNL)

NREL contributors:

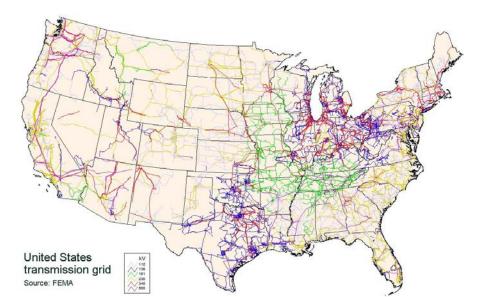
Evan Reznicek, Masha Koleva, Dan Rowland, Matt Kotarbinski, Elenya Grant, Kaitlin Brunik, and many others.

Why Is This Important?

Potential Impact: Time to deployment can be reduced.

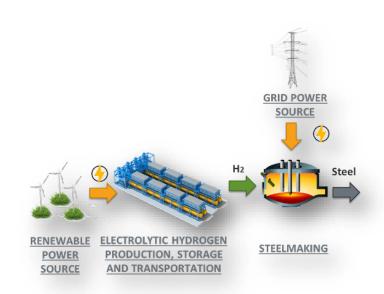
Integrated H₂ (directly coupled wind-H₂) provides an accelerated deployment pathway and opens up new locations that lack grid infrastructure. Maximize existing infrastructure.

Co-location of assets can provide cost savings and cross-sector coupling opportunities.



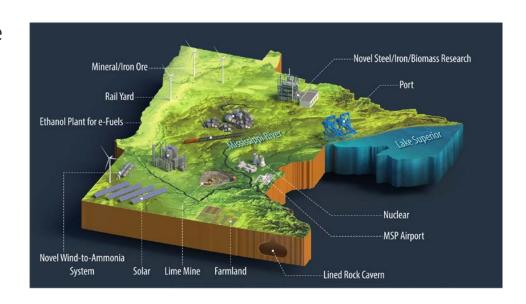
Industrial Decarbonization In More Detail

- Focused on 4 pillars driven by clean fuels (H₂+e-fuels): green ammonia, green steel, green concrete/cement, and clean e-fuels.
- Industrial decarbonization requires combination of:
 - Green electrons (renewables)
 - Geologic storage (lined rock caverns) to store H₂
 - Access to raw materials such as water, iron ore, etc.
 - Existing (or emerging delivery) infrastructure or location for end use.
- Northern Minnesota (Duluth, Iron Range) has been identified as a location for low-cost steel.
 - IRA tax incentives are a game changer
 - Results of a community-driven program (C-LEAP).



Minnesota's Opportunity

- ✓ MN occupies a *unique* position with key assets co-located in-state
 - Resources
 - Infrastructure, shipping
 - Renewable energy
 - Storage
 - Industry & business
 - Governments, agencies
 - Communities
 - Academia & research
 - NGOs.



- ✓ The IRA provides a finite window of opportunity (2035)
- ✓ Requires the "Minnesota Community" to own it

The Energy Transition and the Opportunities of Integrated Industrial Decarbonization

R.T. Weberg rtweberg@d.umn.edu







Natural Resources Research Institute

University of Minnesota Duluth **Driven to Discover****

Driven to Discover

Green Steel Scenarios

A) Blast furnace conversion to green hydrogen blending

MN role: provide designed iron feedstocks

B) Green Iron Product(s) + Electric Arc Furnace

- DRI (direct reduced iron), HBI (hot briquetted iron), pig iron
- MN role: produce green iron and/or steel products

C) Conversion of Ore to Green Iron Units/Green Steel

- Green energy with/without green hydrogen to convert ore to product
- Can utilize poor grade ores
- May be amenable to renewable power variability
- > MN role: engage opportunities, support development
 - SSAB, H₂ Green Steel, others

Emerging Minnesota Execution Plan

1. Minnesota Assessment & Planning

• 90 days: identify leader(s), engage stakeholders

2. Research Effort – ongoing risk reduction

- 5 MW H₂ generation
- Collaboration: NREL, NRRI, national labs
- Initiating 2024

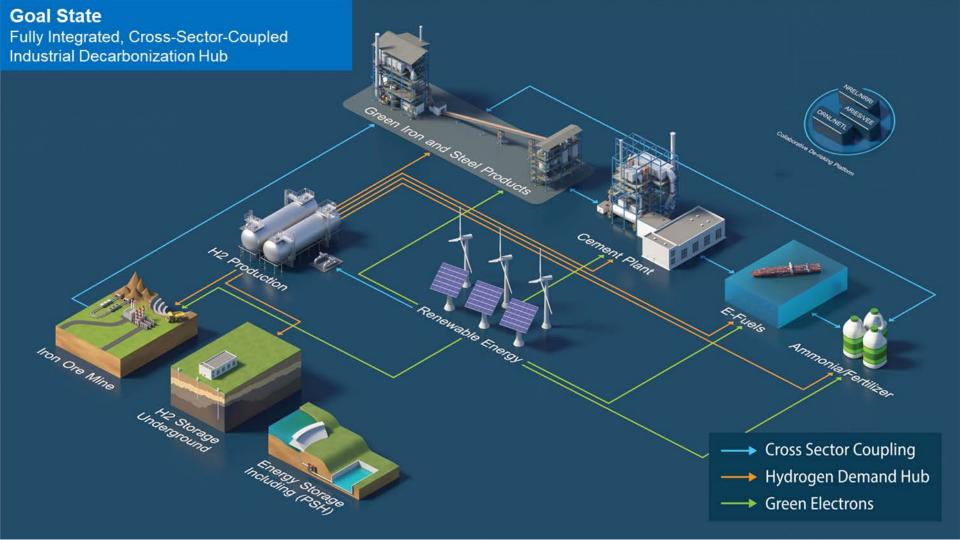
3. Pilot Demonstration

- 100 MW H₂ generation
- Targeting 2027 commissioning
- Industry participation

4. Full Demonstration

- 1 GW H₂ generation
- Must be initiated by December 2032
- Industry investment





Impacts and Challenges

- Investment in next generation industry
 - New jobs, workforce development, housing
- Community inclusion
 - Continued outreach, updates; breaking traditional practices
- Broader portfolio of Minnesota iron products
 - Offtake markets; changing economic dynamics
- Cross-coupled industries
 - Inter-industry cooperation, incentives; Identify benefits
- Reduced CO₂, carbon footprint
 - LCA verification; quantify national & global impact
- Enhanced global competitiveness
 - Changing market expectations vs. "green sourcing"
- Retain value/opportunity in Minnesota and region
 - Reinvest in economy, communities, environment
- Minnesota as national decarbonization model
 - Build productive partnerships to help accelerate national priorities



Manufacturing Today

Questions? Please reach out to:

Jen King Jen.King@nrel.gov

R.T. Weberg rtweberg@d.umn.edu





Stor4Build Overview

A Multi-Lab Building Energy Storage Consortium



Photo from iStock-141130434

Funded By:





Co-Directors:

















Accelerating the Equitable Growth, Optimization, and Deployment of Cost-Effective Storage Technologies for Buildings

- Stor4Build is addressing the need for equitable solutions that ensure benefits of storage technologies are clear for all communities.
- 5-year goal is to implement a community-scale demonstration of technologies, which will serve as a foundation for large-scale deployments of thermal and battery energy storage and systems capable of satisfying both the heating and cooling needs in buildings.

- Multi-lab consortium includes active participants from industry, utilities, nonprofit organizations, communities, building owners, academia, government, and other research institutions.
- Two steering councils (R&D and Market Adoption) support equity-centric scaled adoption of building energy storage technologies and a market transformation to increase market viability.

Funded By:

ENERGY Office of ENERGY EFFICIENCY & RENEWABLE ENERGY

Co-Directors:







Supported By:







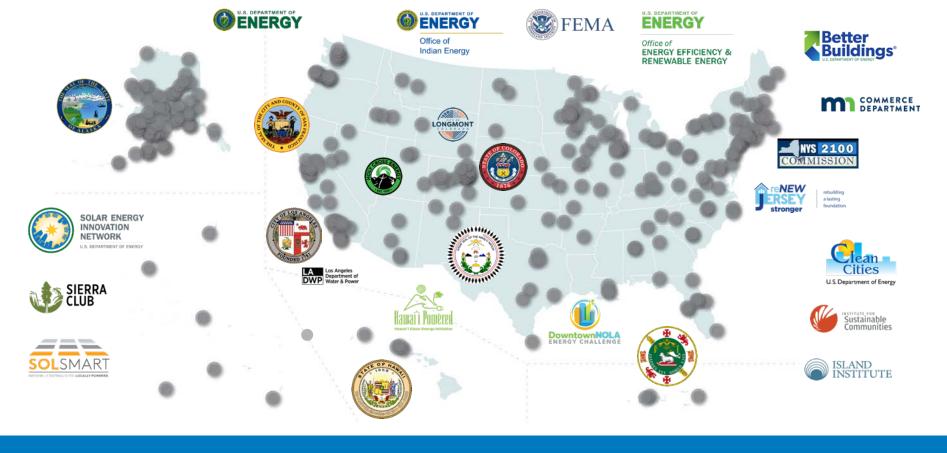
Get Involved

Contact <u>Stor4Build@ee.doe.gov</u> for more information on ways to collaborate or to receive the latest Stor4Build news.



Learn more on Energy.gov





NREL has partnered with and supported **more than 3,000** communities, tribes, jurisdictions, utilities, and businesses for **energy transitions** planning, technical assistance, capacity building, workforce development, and more.





Source: Bladerunner and Starcraft Green Steel

Electrified Processes for Industry without Carbon (EPIXC) \$140+ Million DOE Clean Energy Manufacturing Institute

Vision: Electric heating is economical and supports manufacturing decarbonization everywhere for everyone.

Goals

- Embody DEIA
- Close knowledge and training gaps to de-risk industrial deployment of electric heating technologies
- Leverage broad industrial consortia

- Operate industrially relevant testbeds (cement, steel, chemicals and refining, food processing and pulp and paper)
- Demonstrate cost parity of electric heating when compared to levelized cost of heating with fossil fuels with CCUS



Maria **Curry-Nkansah** Chief Diversity Officer

17 U.S. Manufacturing Institutes

(Academia, Industry, National Labs, and More)





































https://www.manufacturingusa.com/institutes

Energy Transition in Real Time—The Why?

- For almost a century, coal powered America, made millionaires, and at its peak employed 883,000 people.
- Today, roughly 43,600 people work for the industry.
- Significant energy and economic shifts from coal to natural gas
 - High unemployment and lost pensions (due to bankruptcies)
 - High poverty rates
 - High numbers of children below the poverty line (45-50% in many counties)
 - Highest per capital opioid epidemic
 - Legacy health issues due to PM_{2.5} and exposure to other toxins
 - Extreme soil and water pollution
 - Improved air quality due to coal mining and coal-fired plant closures









But... Even if a community has clean air; if there are no jobs or economic development, you have cascading effects leading to widespread poverty entrapment.

Diversified WFD Port Arthur Jumpstart Project







- Port Arthur
- Beaumont
- Orange

■ Puma, Arizona

- Rolla Missouri
- Tuskegee Alabama
- Montgomery Alabama

Career Pathway Support

What is the Institute's role and depth of training?









Career Path Strategy		
Skill Level	Activity	Curriculum Developers and Training Providers
	Professional Position Corporate Internships Research Internship	UniversitiesNational LabsIndustryKAAs/KTAs
	Journeyman • Industry • Unions	• Unions
	Apprentice	 Community Colleges Community WFD Trade Associations KAAs/KTAs
	Pre-Apprentice	
Basic Life:	Entry Level positions	 Community WFD Groups High Schools Unions Industry Trade Associations Community Colleges KAAS/KTAS
	Basic Math Skills	
	Life Skills/Wrap Around Services	

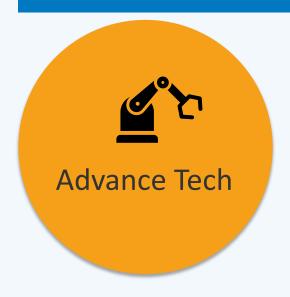




Innovation &



Without Startups, Innovation Stalls







Innovation & Entrepreneurship Center

Building a **cleantech ecosystem** to **empower** market solutions that **transform** communities around the world.

Network Management

We build and maintain lasting relationships with key, relevant, and emerging performers and customers in the cleantech ecosystem.

- Entrepreneurs
- Incubator/Accelerator Network
- Investor Advisory Board
- Industry Boards

Convene the Ecosystem

We design and execute events and opportunities to connect our customers with each other to help bring relevant technologies to market and develop innovative markets.

- Industry Growth Forum
- Innovation Showcase
- Camp Cleantech

Tech Incubation Programs

We create solutions and programs that suit our customers' needs by identifying gaps preventing innovations from getting to market or preventing market growth.

- Wells Fargo IN² program
- Shell GameChanger powered by NREL
- Clean Energy Cybersecurity Accelerator
- Energy I-Corps
- Canadian Tech Incubator
- NCAP

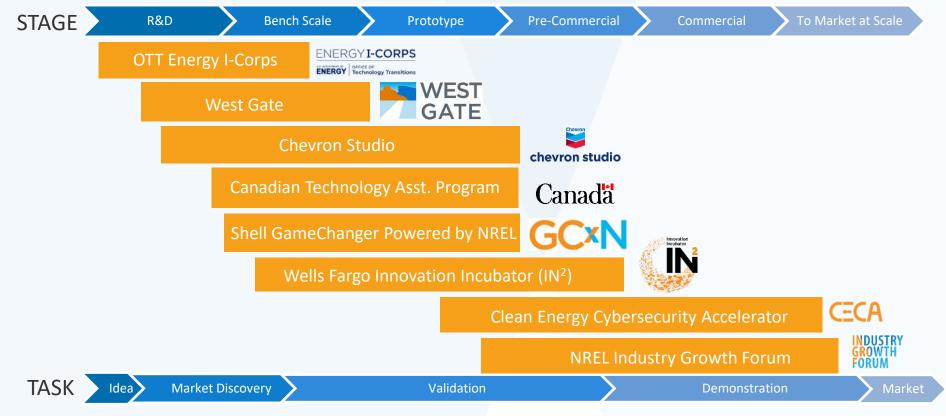
Innovation & Entrepreneurship Center

Building a **cleantech ecosystem** to **empower** market solutions that **transform** communities around the world.





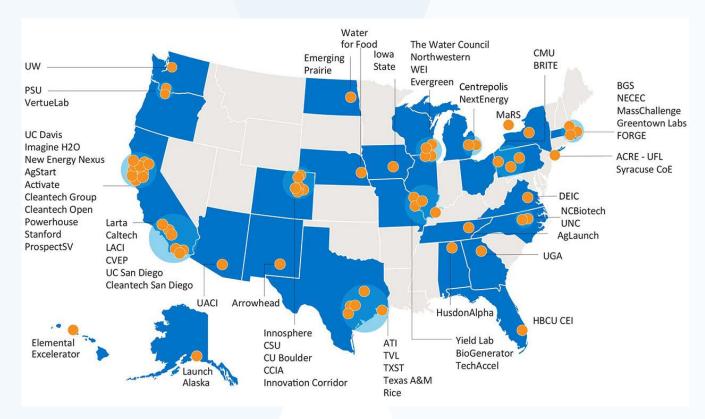
Accelerating Tech to Market With Tech Incubation Programs



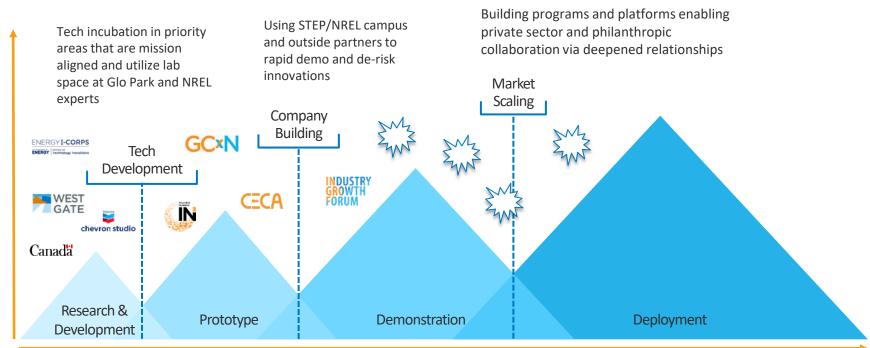
Our Incubation Network

60+
incubators,
accelerators
and university
programs

We gain referrals for top startups and convene and fund this network to build a diverse and healthy cleantech pipeline.



Next decade expanded focus on innovation around demonstration and deployment barriers using IEC capabilities



Campus Expansion To Support Partnerships and Innovation

Global Energy Park (Glo Park)
South Table Mountain Energy Park
Energy Materials & Processing at Scale (EMAPS)



NREL's administrative offices, education center, and most research laboratories are located at our 327-acre campus in Golden, Colorado.

- Energy Systems Integration Facility
- Field Test Laboratory Building
- High-Flux Solar Furnace
- Integrated Biorefinery Research Facility
- Renewable Fuel Heat Plant

- Solar Energy Research Facility
- Solar Radiation Research Laboratory
- Thermal Test Facility
- Vehicle Testing and Integration Facility.

The Global
Energy Park
Leading the
Future of
Energy



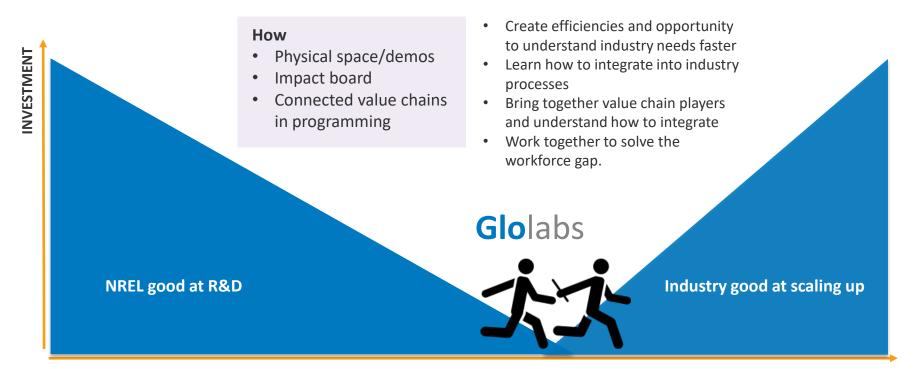
Glo Park

The visionary state of Colorado-led Global Energy Park ("Glo Park") will be a living laboratory where leaders from around the world will collaborate to tackle the planet's most complex and urgent energy issues, all while creating advanced-industry workforce opportunities and engaging people of all ages.



A rendering of the proposed Global Energy Park provided by NexCore Group and Page.

Focused portfolio of activities that simplifies the process for startups and accelerates the scale-up with industry



North Campus

The **new net-zero energy** building will allow for open access by the community to enjoy the plaza and learn about the technology and careers in clean energy along "educational trails" from outdoor exhibits in the open space between the north and south campuses.





The South Table Mountain Energy Park (STEP) is the future home of startups, entrepreneurs, and new innovations to help move the latest research and products closer to commercialization.

NREL is working closely with the Colorado State Historic Preservation Office on a master plan for STEP, located just south of NREL's South Table Mountain Campus, that will outline short-, mid-, and long-term developments.

South Campus

NREL will preserve the historical origins as barracks in the newly named South Table Mountain Energy Park but renovated to incorporate the latest technology and practices in assuring businesses can de-risk their technology to move to commercialization.















Energy Materials & Processing at Scale (EMAPS)

• 127,000 sq. ft signature facility that minimizes barriers to rapidly scaling up new energy, materials, devices, and processes.

- JE Dunn and SmithGroup awarded design-build contract.
- Design is underway.
- Construction is anticipated to begin in early fall of 2024 and completed in FY 2027.



Collaborative approaches to launching new research areas and solving complex energy system challenges.

What's Next

- Prepare stakeholders for clean energy implications of emerging trends in climate, society, and technology.
- Inform research capabilities/networks around climate adaptation and clean energy workforce development.
- Industrial decarbonization has fair reaching benefits that improve the quality of our homes and businesses.
- On-site laboratories and immersive computational rooms will enable NREL researchers and partners to conduct joint research and experiments

