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Contract

HYDROGEN PROPULSION TECHNOLOGIES MARKET ASSESSMENT

HIGH VALUE MANUFACTURING CATAPULT

UK7: Contract details notice - Procurement Act 2023 - [view information about notice types](#)

Notice identifier: 2025/S 000-060969

Procurement identifier (OCID): ocds-h6vhtk-05a51f

Published 30 September 2025, 3:32pm

Scope

Description

Deliverable 1 - Critical Review

An external consultant has undertaken a market assessment to quantify the national and global opportunity for hydrogen propulsion in applications across the automotive, non-road mobile machinery, aviation, marine, and rail sectors. The assessment evaluates a range of hydrogen technologies, including:

- Hydrogen fuel cells
- Hydrogen internal combustion engines
- Hydrogen gas turbines and thrust generators
- Pressurised hydrogen storage tanks
- Liquid hydrogen storage tanks

In addition, several adjacent, potentially competing technologies were also assessed, including:

- Electric motors
- Battery packs
- Power electronics and control systems

For each technology and sector, the market assessment aimed to ascertain the following:

- The current state of the UK and global hydrogen propulsion market.
- Market sizing for 2030 and 2050, with data input between these dates where possible.
- Potential market penetration rates.

The method used in this assessment follows a similar approach to market studies that Gemserv have previously conducted, as discussed above in Relevant Case Studies. Informed by Gemserv's prior experience in this area, Gemserv will critically review and validate this market assessment

The UK offers an internationally competitive ecosystem for the development of hydrogen propulsion systems, crossing leading exporting companies, significant investment in R&D, world-class universities and industry expertise. The government has sought to support this market advantage via the Hydrogen Propulsion Manufacturing Taskforce and targeted investment across several transport sectors. As shown by Gemserv and Hydrogen UK's International Hydrogen Progress Index ([Link](#)), the UK has consistently trailed behind China, Germany, South Korea, Canada and Japan, amongst others, for supporting the overall hydrogen sector's deployment. As such, further government support will be crucial for effectively positioning the UK in the emerging international hydrogen propulsion market and unlocking the sector's full potential.

Following on from the Critical Review, Gemserv will assess the political, economic, social and technological barriers and drivers of the national and global hydrogen propulsion market. Understanding the nuances of the hydrogen sector, Gemserv will answer the questions of:

What national and global measures drive the hydrogen propulsion market, which are already in place, which are planned, and what is additionally required to unlock the potential of the hydrogen propulsion market?

Gemserv will conduct an analysis to identify the policy and regulatory measures, as well as key hydrogen technology deployment milestones, that will influence the forecasted

market size and penetration rates. This includes assessing the conditions required for the market to reach its upper-bound growth scenario, as well as the minimum thresholds necessary to achieve the lower-bound scenario.

Table 2 breaks down the methodology and outcomes by Phases. Phase 1 will review the drivers and barriers for the deployment of the hydrogen propulsion market at a national level and international level. Phase 2 and 3 will draw on this base knowledge, to align HII's market assessment with the current and future market landscape and identify the minimum and maximum interventions and milestones required to support market development.

Contract 1

Supplier

- Talan

Contract value

- £34,550 excluding VAT
- £41,460 including VAT

Below the relevant threshold

Date signed

15 August 2025

Contract dates

- 1 October 2025 to 31 December 2025
- 3 months

Main procurement category

Services

CPV classifications

- 73200000 - Research and development consultancy services

Contract locations

- UK - United Kingdom

Procedure

Procedure type

Below threshold - without competition

Supplier

Talan

- Companies House: 04419878
- Public Procurement Organisation Number: PVHC-1898-CQGH

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Region: UKI31 - Camden and City of London

Small or medium-sized enterprise (SME): No

Voluntary, community or social enterprise (VCSE): No

Contract 1

Contracting authority

HIGH VALUE MANUFACTURING CATAPULT

- Companies House: 07708659
- Public Procurement Organisation Number: PDLV-4646-XLMG

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Region: UKG31 - Birmingham

Organisation type: Public undertaking (commercial organisation subject to public authority oversight)