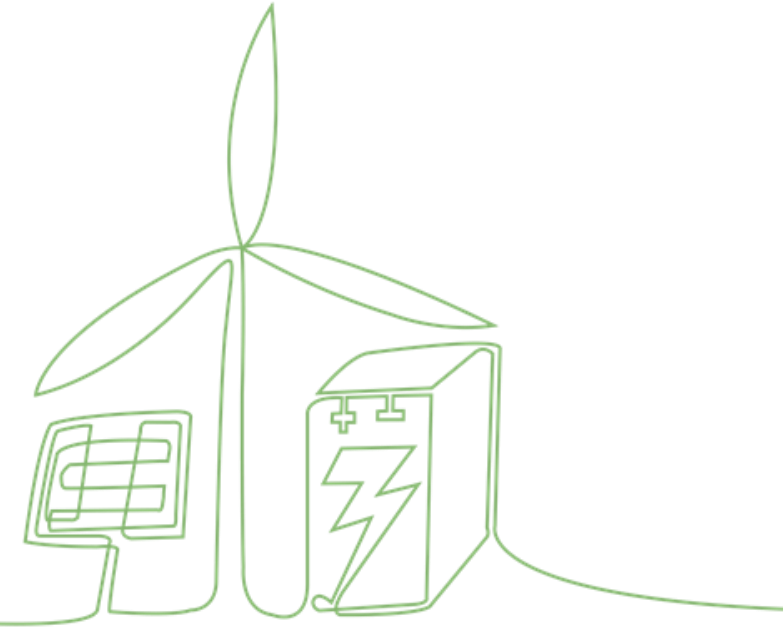




DELTA-EE



EUROPEAN MARKET MONITOR ON ENERGY STORAGE

LATEST STATUS AND TRENDS IN EUROPE

March 2020
Edition 4.0

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European Market Monitor on Energy Storage (EMMES)

The definitive analysis of European energy storage markets



Front-of-Meter and
Behind-the-Meter
market data



Key trends and
forecasts to 2020



The impact of
European policy, now
and in the future



Important drivers and
barriers in each market

EMMES is produced by leading new energy research consultancy Delta-EE, in close partnership with EASE (European Association for Storage of Energy)

- Based upon primary research with leading companies and stakeholders, many of whom are members of EASE
- Market data that companies can rely on, and is updated annually
- Analysis of EU policy and all the main country markets in Europe – segmenting the residential, commercial/industrial and Front-of-Meter sectors

EMMES is available to EASE members and to subscribers of Delta-EE's Energy Storage Research Service

Each biannual EMMES report can be purchased by non-members for €5000.

The fourth edition EMMES 4.0 report updates and extends the previous report (EMMES 3.0) published in March 2019:

- Country energy storage data (2015-2020)
 - Installed base in the residential, C&I and Front-of-Meter segments
 - Battery sales in the residential and C&I sectors
 - Key developments that explain market trends
- Forecast of country energy storage markets for 2020
- Summary of recent market developments
- Latest update and status of EU policy developments
- Market hot topic: for EMMES 4.0 this focuses on local flexibility markets

For more information and to purchase, please contact:

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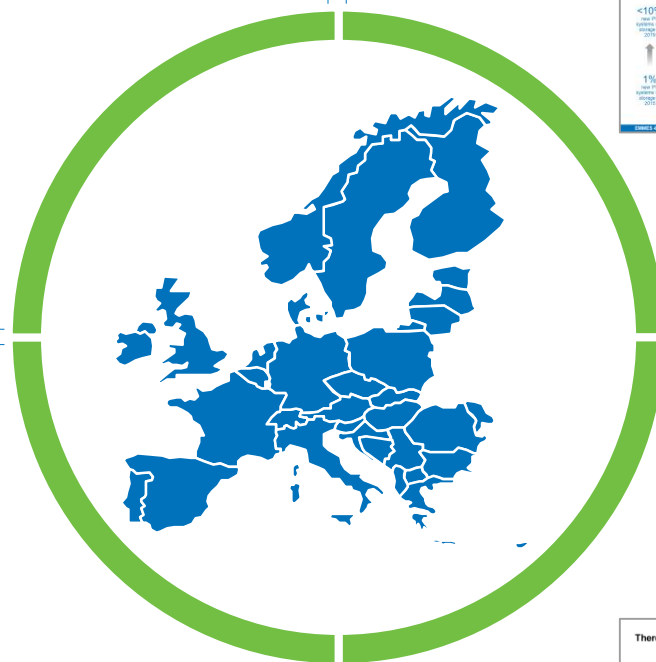
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EMMES 4.0 report

March 2020

Comprehensive geographical coverage of Europe (broken down into 8 regions)

- France
- Germany
- Italy
- UK
- Central / Eastern Europe
- Iberia
- Nordics
- Rest of Europe



Looking at three major market segments

France Residential Energy Storage Market

The residential storage market in France did not develop significantly over 2019, although both consumption is increasingly attractive.

Nordics and Industrial Energy Storage Market

The CA market covers the most developed segment in the Nordics, with opportunities due to constrained distribution grids in both Norway and Sweden.

Central/Eastern Europe Front-of-Meter Energy Storage Market

The CEE Front-of-Meter segment is currently dominated by a handful of projects, growth will be driven by EU legislation opening value streams across the region.

Residential

Commercial/Industrial

Front-of-Meter

Extended summary of the overall status and trends across Europe

Summary of the energy storage* market in Europe
Overview and trends in 2019

The European energy storage market contracted in 2019 to 1 GWh, with a...

What's new?
Country-by-country developments over the last year

France, Germany, Italy, UK, Central/Eastern Europe, Nordics, Iberia, Rest of Europe

Market Hot Topic: *local flexibility markets*

European DSOs activity in demand side flexibility (DSF)

The highest DSO activity in demand side flexibility (DSF) was seen in the UK, followed by Germany and France.

National Regulatory Drivers

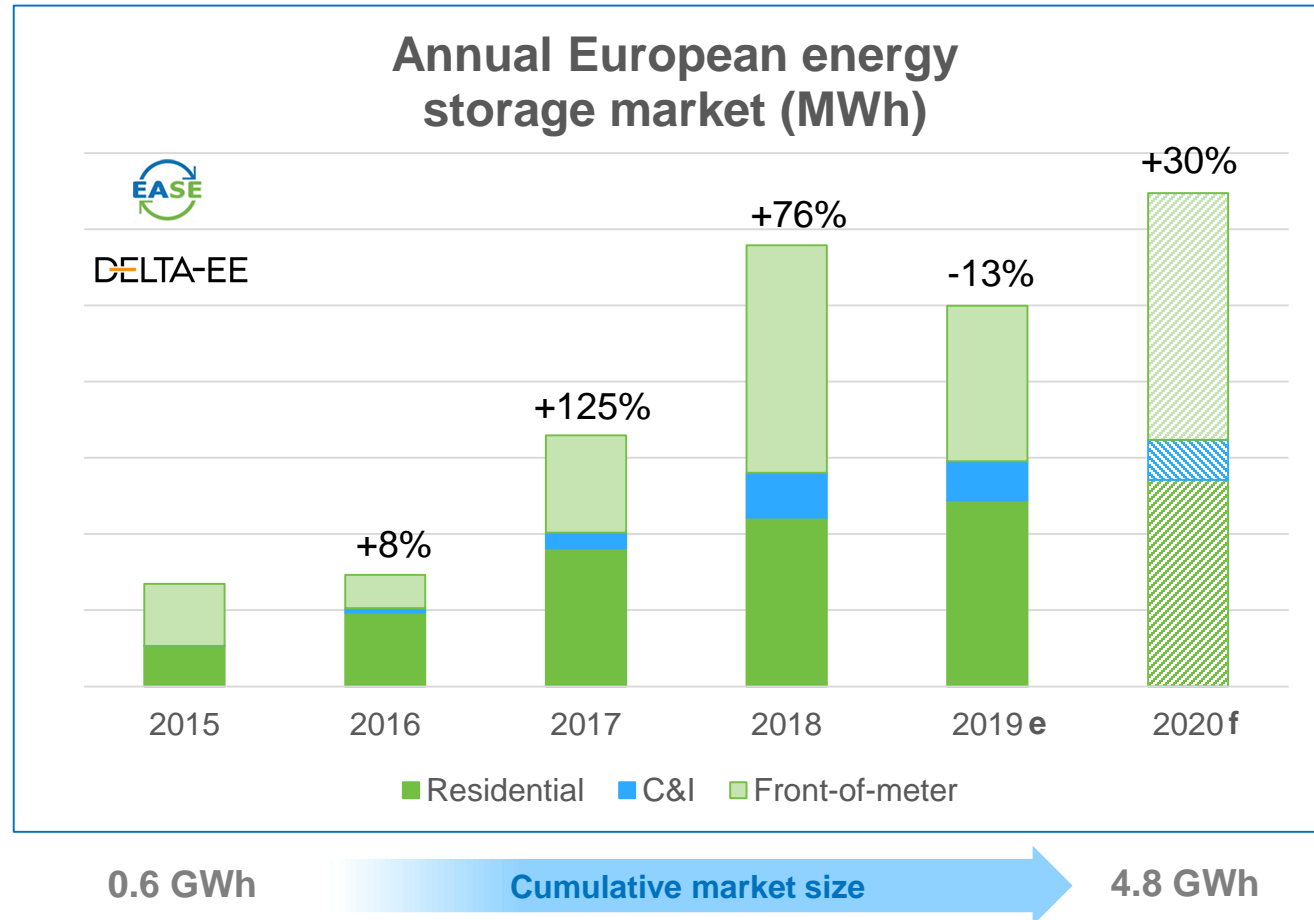
The existing regulatory framework has enabled GB and NL DSOs to create flexibility markets, but liquidity could slow development.

There are ten key elements to local flexibility contracts

1. Contract length
2. Annual capacity
3. Contract length
4. Market access
5. Market access
6. Market access
7. Market access
8. Market access
9. Market access
10. Market access

EMMES 4.0 market data and forecasts

Electrical energy storage*



* The analysis in EMMES 4.0 focuses on stationary electrical, electrochemical and mechanical storage (with the exception of pumped hydro storage).

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