



# EASE COVID 19 Survey Analysis of Results

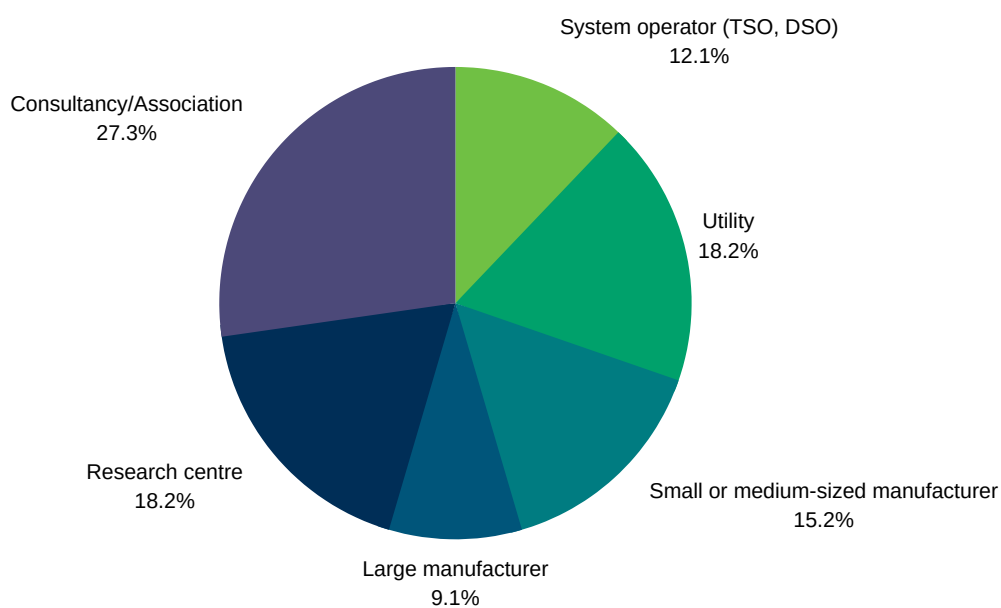
For EASE members' internal use  
Brussels, April 2020



# Background

On 8 April 2020, the EASE Secretariat launched a short online survey to gather initial views about the impact of the COVID-19 pandemic on the energy storage sector. The survey was open to EASE members and non-members.

By 21 April 2020, the EASE Secretariat received 33 responses from different segments of the energy storage industry, with the highest number of responses coming from consultancies and associations, followed by research centres and utilities.

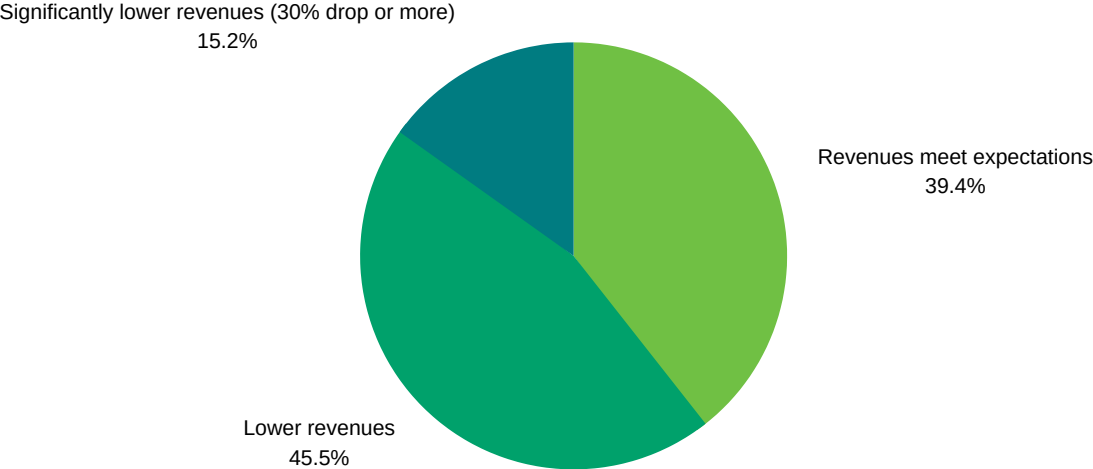


# Results

## Q2 Revenues

60,7% of respondents expect lower Q2 revenues as a result of COVID-19 and related economic impacts (compared to forecasts). Of these, 15,2% expect revenues to be significantly lower (30% or more drop). By contrast, 39,4% of respondents expect revenues to meet the expectations, despite the COVID crisis.

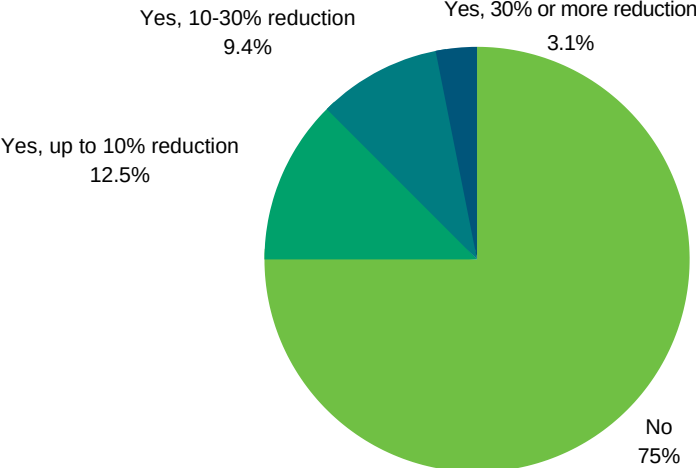
Compared to the forecasts, how do you expect your company's Q2 revenues to change due to COVID-19 and related economic impacts?



## Impact on the Workforce

75% of respondents noted that their workforce had not been affected by layoffs. Only 1 respondent (3,1%) indicated a more than 30% reduction in workforce. Given the expected impacts on revenues, the impact on jobs will be important to monitor as the crisis continues.

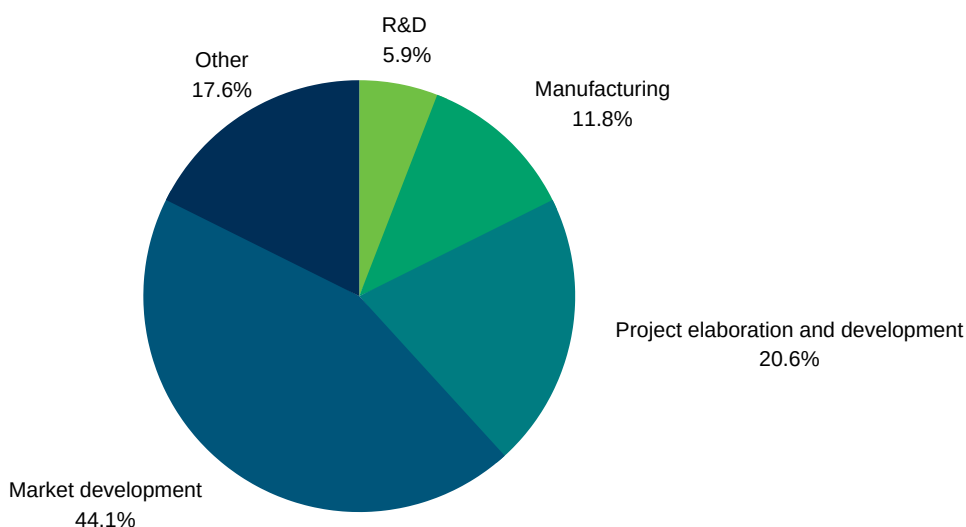
Has your workforce been affected by COVID-19 related layoffs?



## Effects by Business Area

As for the impact of the pandemic on various business segments, market development was identified as the most affected area, selected by 44,1% of respondents. This was followed by project elaboration and development (20,6% of respondents) and manufacturing (11,8%). One respondent who selected "other" pointed out that manufacturing would be most affected in the short term while market development would be the most affected area in the long term. Another respondent who selected "other" indicated that project elaboration and development and market development would be equally affected. Further discussions would be needed to fully understand the (expected) effects of the pandemic on various business segments in the short, medium, and long term and to identify advocacy actions to mitigate these.

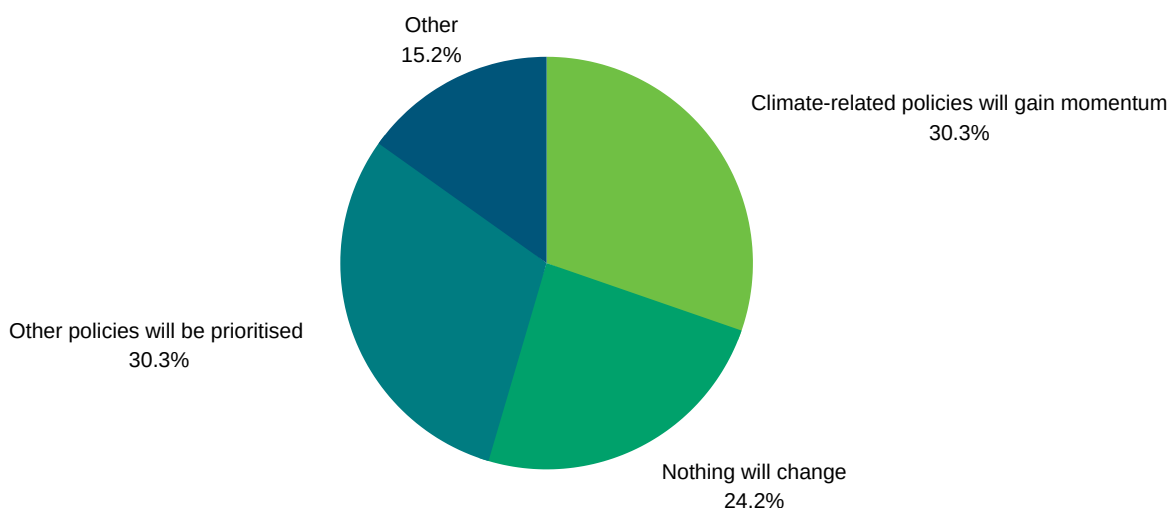
Which area will you see be most affected by the COVID-19 pandemic?



## Expected Policy Impacts

Respondents were evenly split: 30,3% expected climate-related policies to gain momentum, while 30,3% stated that other policy areas would be prioritised, putting climate-related policies on the back burner. 24,2% of respondents expected no change. Other answers filled in by respondents included: it will vary by country and industry; public health will be prioritised over climate policy, and it is too soon or uncertain to tell.

Do you expect the European Union and national governments' support for climate-related policies to change?



# EASE Secretariat Analysis and Next Steps

This short survey, though by no means representative of the storage sector, gives a first broad idea of how the sector is impacted by the COVID-19 pandemic. A clear majority of respondents expect their companies to see lower revenues, although these have not (yet) resulted in job layoffs. Respondents are concerned about the impacts on market development and deployment of storage projects and are unsure about how EU climate policy will evolve.

Since the sector finds itself at the beginning of what may be a protracted crisis, the impacts on individual companies, market segments, and policy developments more broadly are far from clear. EASE is eager to support members by gathering additional views on how the crisis affects the sector, which can feed into effective advocacy strategies aimed at policymakers as well as information-gathering to support members' individual responses.

To build on the survey results and define a COVID-19 response strategy, the Secretariat will proceed with the following steps:

- Publish a high-level summary of the survey results (keeping all respondents completely anonymous) on the EASE website and share with relevant policymakers who request our inputs on this issue.
- Continue to keep members updated on the evolution of policy debates at EU level. EASE will also continue to engage with policymakers to share EASE's agreed positions and draw attention to the need for rapid implementation of the climate-related measures as part of a larger recovery strategy for Europe.
- Collect additional inputs on how the crisis affects members by:
  - Organising one-on-one calls with members and collecting further inputs via e-mail
  - Holding a joint call with interested EASE members to collect additional insights (an invitation will be sent shortly)
- Using these additional inputs, the Secretariat will define appropriate activities to further support members, such as:
  - Collecting policy 'asks' to bring to EU policymakers
  - Conducting further surveys and information gathering to understand how the evolving crisis continues to affect members
- Given the limited possibilities for in-person meetings, the Secretariat will further support the organisation of webinars related to specific market intelligence and knowledge sharing.



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