

Activity Report 2023





Acknowledgements

Special acknowledgments to the EASE members who helped make this publication possible.

Cover: © Picture by Krivec Ales downloaded on Pexels.com

Page 7: © Voith Hydro, Pumped Storage Power Station COO, Trois-Ponts, Belgium

Page 8: © Saft, a 61 MW / 61 MWh BESS for capacity and frequency regulation, Dunkirk site, Northern France.

Page 11: © ENEL X, Global Retail, Loxton, Australia

Page 15: © Kyoto, Norbis Park Heatcube, Denmark

Page 17: © Wärtsilä, Giga Storage Buffalo Battery, the Netherlands

Page 19: © Fluence, Energy Cells, Vilnius, Lithuania

Page 23: © EDF, Revin Pumped Storage Power Plant, Champagne Up Est, Ardennes

Table of Contents

Energy Storage Technologies	4
Energy Storage Applications	5
Foreword by Alejandro Ulzurrun	6
Foreword by Nicolás González Casares	8
Welcome by EASE President David Post	10
2023 in Circles	12
Policy Development in 2023	14
EASE Activities in Policy	16
Developments in Funding for Energy Storage and EASE Involvement in EU-funded Projects	18
Energy Storage Global Conference 2023	20
Announcement of ESGC 2024	21
What to Expect in 2024?	22
Closing by EASE Secretary General	24
EASE Structure and Organisation	26
Become a member	28
EASE Members	30
Contacts	31



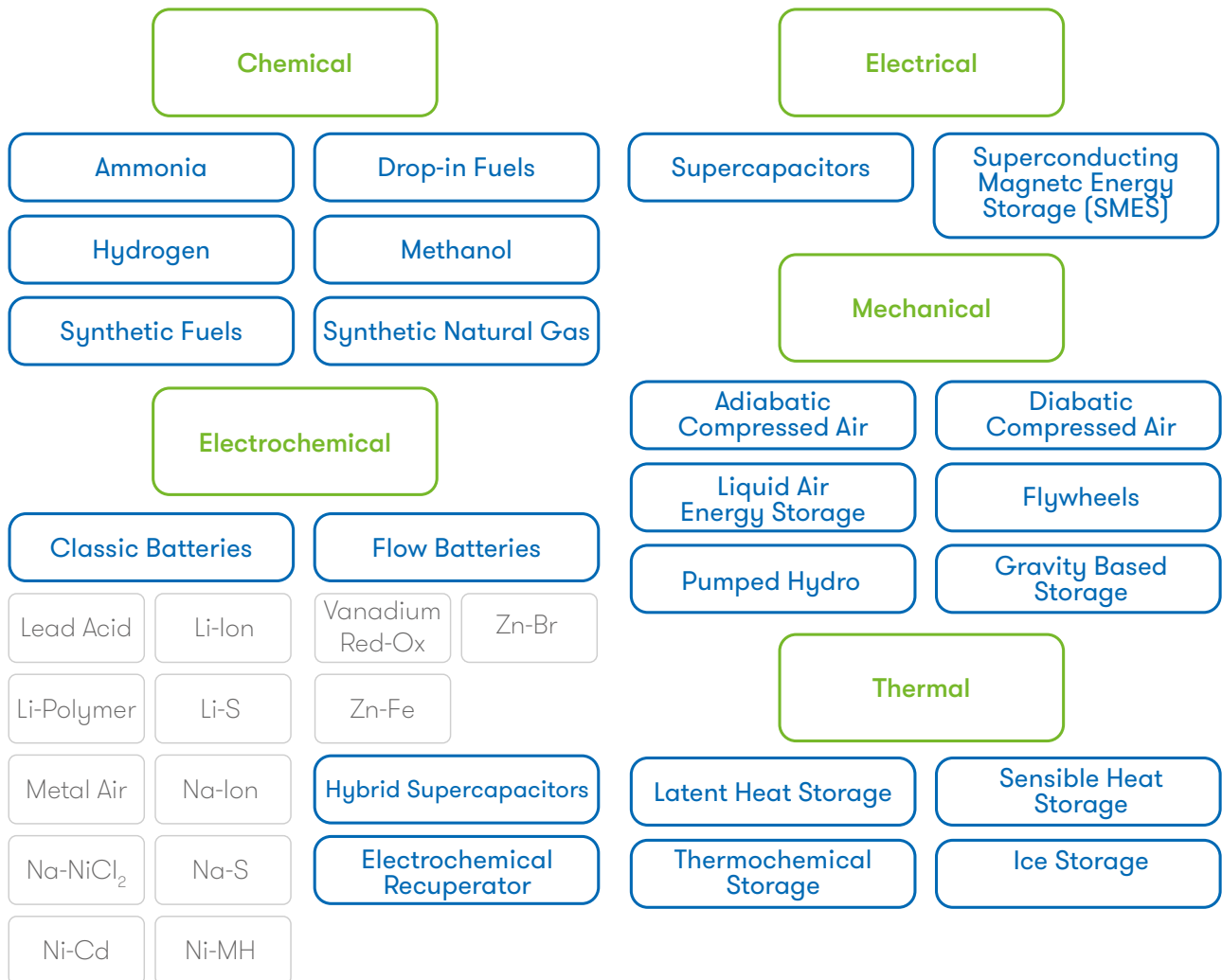


Energy Storage Technologies

Energy storage devices are “charged” when they absorb energy, either directly from renewable generation devices or indirectly from the electricity grid. They “discharge” when they deliver the stored energy back into the grid. Charge and discharge normally require power conversion devices, to transform electrical energy (AC or DC) into a different form of chemical, electrochemical, electrical, mechanical, and thermal.

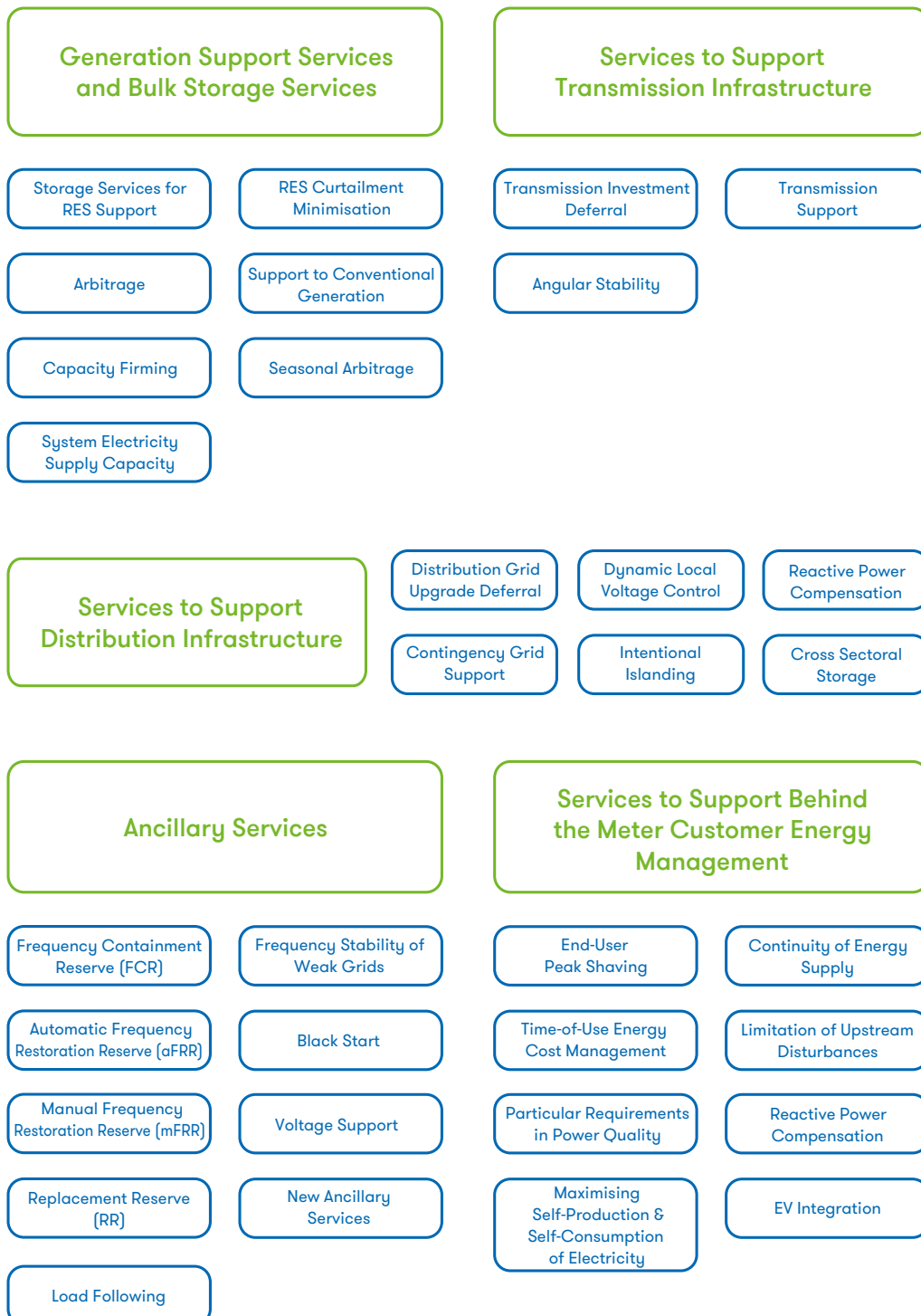
Energy storage can store surplus energy from intermittent renewable sources, such as solar PV and wind power, until it is required – allowing therefore for the integration of additional renewable energy into the system.

Different energy storage systems – centralised and decentralised – consider different technological possibilities, which EASE organises in 5 energy storage classes: chemical, electrochemical, electrical, mechanical and thermal.



Energy Storage Applications

Energy storage has many valuable applications across the energy system. The range of applications which energy storage devices can provide is constantly evolving, both because of the ongoing development of new energy storage technologies, but also the evolving flexibility needs of the energy system. It is expected that the list of storage applications will continue to grow over the next few years. Most storage facilities will need to provide several services in order to have a robust business case.





Foreword by Alejandro Ulzurrun



Alejandro Ulzurrun

Head of Unit for Energy
Security & Safety,
DG ENER, European
Commission

For two decades, the design of the electricity market has served European companies and consumers effectively, fostering the benefits of a single market. However, the surge in electricity and gas prices in 2021-2022, which reached record levels, prompted a re-evaluation of the current system.

The European Commission proposed a reform of the EU's electricity market design in March 2023 and a political agreement was reached nine months later by the European Parliament and Council of Ministers. The reform has three main objectives.

First and foremost, the European Commission proposed to introduce new tools to make the energy bills of European households and companies less dependent on the short-term market price of electricity and from price volatility.

The aim is also to provide more stable revenues for investors in renewable energy.

Secondly, in order to reduce the influence of fossil prices on the electricity market, a priority is to further accelerate the deployment of renewables by supporting their integration into the grid.

This is the path we want to follow to pursue the EU's decarbonisation objectives, also as a part of the REPowerEU objectives of reducing dependence on fossil fuels.

Thirdly, the reform also aims to provide better consumer protection and empowerment.

At the same time, the reform includes a variety of measures to stimulate the use and development of non-fossil flexibility solutions.

Storage is one of a number of technological solutions which can provide this type of flexibility. It complements other solutions such as additional interconnections, generation and demand-response.

As more renewable energy is produced, there will be a much greater need for flexibility in the energy system in every Member State of the European Union.

Those needs are expected to reach 24% of total EU electricity demand in 2030 (from 11% in 2021), reaching 30% by 2050.



© Voith Hydro, Pumped Storage Power Station COO, Trois-Ponts, Belgium

Flexibility solutions such as storage play an important role in decreasing renewables curtailment. Surplus energy can be stored during periods of high production.

This stored electricity can then be released into the grid during peak demand periods, thereby reducing short-term price volatility and peak prices for consumers.

Last but not least, increasing the flexibility of the electricity system and making sure that such flexibility is provided by non-fossil sources will be the key for the successful integration of renewables and for achieving the important decarbonisation targets set by the European Union.

“

Flexibility solutions such as storage play an important role in decreasing renewables curtailment.

Surplus energy can be stored during periods of high production.



Foreword by Nicolás González Casares



Nicolás González Casares

Member of the
European Parliament

The fundamental concept is clear: the more renewable electricity we have, the more energy storage we need.

By 2030, the European Union is expected to reach more than 70% of renewables in the electricity means, and nowadays at any moment in time, the consumption of electricity has to be perfectly matched with the generation of electricity.

Most system flexibility is currently provided by fossil gas, so we have to reduce our dependence, not only because of climate change, but also because of energy security.

Renewables, being variable, sometimes lead to generation levels that exceed demand, resulting in surpluses that, in some countries, cannot be used because there is not enough storage.

This is a waste of green electricity. In this framework, energy storage emerges as a significant player in ensuring flexibility and security of supply in the energy system by facilitating renewable energy, supporting the grid, and optimising energy usage.

The Electricity Market Reform presents a strategic opportunity to advocate for energy storage. We are in an energy transition because we are investing in renewables and in the decarbonisation of our electricity system.

In this period, Europe faces different threats and ongoing conflicts affect fossil fuels imports and their price. In turn, this gas price spikes impact electricity prices in the spot market.

We have to bet on forward markets and provide consumers and producers with stable prices - we need to avoid a social crisis.

We have to bet on new renewable electricity and we have to protect the integrity of the European internal market. It is key to reinforce consumers' rights, especially the most vulnerable ones and those facing energy poverty.



© Saft, Dunkirk site, Northern France

With a strong mandate from the European Parliament to address the energy crisis promptly, common measures are more critical than ever.

It is evident that without energy storage, achieving our climate goals is impossible.

The development of energy storage not only addresses climate challenges, but also represents a substantial industrial opportunity for Europe. I encourage you to continue to fight and further energy storage.

“

We have to bet on forward markets and provide consumers and producers with stable prices - we need to avoid a social crisis.





Welcome by EASE President Mr David Post



David Post
EASE President

2023 has been a record-breaking year for newly installed capacity in Europe, marked by unprecedented milestones. Total energy storage deployment grew by 34% spurred by a growing tender activity, showcasing the increasing significance of energy storage as an essential enabler of the energy transition.

One of the highlights this year came with the EU Electricity Market Design Directive reform, which framework now provides specific guidelines for the deployment of flexibility and energy storage.

EASE Continues to Fuel the Future of Energy Storage Across Europe

I am proud to acknowledge that EASE is playing a crucial role in scaling the growth of Energy Storage across Europe, as our membership has become larger and more diversified, going from 13 members in 2011 to a record 74 members today.

This year also saw the constitution of the Energy Storage Coalition, where EASE teamed up with SolarPower Europe, WindEurope, and Breakthrough Energy to jointly push for the deployment of Energy Storage across Europe. EASE also strengthened ties with the

Long Duration Energy Storage (LDES) Council and various country associations, deemed instrumental to endorse our collective mission forward.

During 2023, EASE organized numerous webinars and events triggering the dialogue between key stakeholders. Just think of the successful ESGC which in its 6th edition brought together 380 experts, policymakers, and stakeholders from 36 different countries, fostering an environment where ideas flourish, and partnerships thrive.

EASE's Agenda for 2024 in Energy Storage Innovation

So, as we close this great year, what can we expect from 2024?

In 2024, EASE will remain committed to driving positive change in the energy storage landscape, with ambitious yet crucial objectives.



© ENEL X, Global Retail, Loxton, Australia

Firstly, we will work with EU member states and their respective associations to put in practice the guidelines of the EU Market Design Directive, i.e., a collaborative effort to aid the deployment of energy storage at EU country level.

Secondly, EASE will continue to champion emerging technologies, providing – where possible - support to accelerate their path to commercial viability.

Finally, EASE will keep its members at the forefront of industry trends, sharing the “latest-and-greatest” insights around critical topics such as software solutions, market access strategies, EU funding opportunities, and much more.

As we reflect on our 2023 achievements and embrace the 2024 challenges and opportunities, let’s continue to make

energy storage the key technology of a more sustainable, flexible, resilient, and innovative energy landscape. Best wishes for 2024!

And lastly, my deepest thanks to the General Assembly for re-electing me as EASE president, which for me is a big honor!

“

In 2024, EASE will remain committed to driving positive change in the energy storage landscape, with ambitious yet crucial objectives.

2023 in Circles

January

Morrow Batteries, SLB, Socomec join EASE.



EASE publishes a **public consultation on the Revision of the EU's Electricity Market Design.**



Energy Vault, Elpedison, AEPIBAL, ElectroFleet, Hithium and Ensired join EASE.



EASE attends and presents at the **Energy Storage Summit** in London, The United Kingdom.

EASE with other 5 industry associations publish a **Joint Statement on the European Commission's revision of the electricity market design.**



GIGA Storage, Northvolt, Form Energy, BayWa r.e join EASE.



April

EASE together with LCP-Delta present the **publication of the seventh edition of the European Market Monitor on Energy Storage (EMMES).**

Hungarian Battery Association joins EASE.



EASE prepares a **position paper on the Electricity Market Design Revision Proposal.**



EASE together with Breakthrough Energy, SolarPower Europe and Wind Europe launch **the Energy Storage Coalition.**

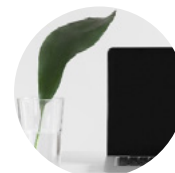


EASE with other 4 industry associations publish a **Joint Statement highlighting the relevance and suggest improvements on the dedicated energy sharing framework proposed by the European Commission's revision of the electricity market design.**



June

EASE, together with 10 other European Climate and Clean Tech Group **call on the European Parliament to keep the Net-Zero Industry Act true to its purpose of scaling up clean technologies across Europe.**



July

EASE Secretary General Patrick Clerens presents **a statement on the Batteries Regulation after the European Parliament gave its endorsement to a deal reached with the Council.**



Spp Development Ukraine joins EASE.



EASE supports the Electricity Energy Storage (ees Europe) conference and exhibition in Munich, Germany.

EASE **replies to the European Commission's Public Consultation and Call for Evidence Feedback on the EU Climate Target for 2040.**



EASE publishes a **Technical Contribution to the European Chemicals Agency's Public Consultation on the Annex XV Restriction Report for PFAS.**



EASE prepares **a paper that aims to shed light on the numerous benefits of thermal energy storage (TES)** by providing an overview of technologies, inspiring projects, business cases, and revenue streams.



October

EASE publishes **a statement on the Critical Raw Materials Act** after the ITRE Committee adopted the draft report of the rapporteur Nicola Beer.



EASE publishes **a report on Business Case and Taxonomy of Behind-the-Meter Battery Energy Storage Systems in Europe.**



EASE organises the **6th Energy Storage Global Conference.** The three-day event focused on energy storage policy, markets and technologies.

EASE, together with 25+ other stakeholders, including civil society, investors, innovators and specialists, **call on Members of the European Parliament to ensure that the NZIA remains impactful and targeted to support the development of the European cleantech industry.**



EASE attends and presents at Enlit Europe 2023 in Paris, France.

EASE prepares **a new briefing on Wind Action Plan.**



Jinko Solar joins EASE.



November

December



Policy Developments in 2023

The European energy sector witnessed a significant array of policy developments in 2023. While the European Commission focused largely on finalising ongoing initiatives and implementing adopted legislation, it remained committed to addressing the challenges stemming from the Russian invasion in Ukraine and the subsequent energy crisis. EU's overarching objectives were to strengthen the resilience of the energy system and limit strategic dependencies.

Electricity Market Design

In March 2023, the European Commission unveiled its proposal for the Electricity Market Design (EMD) Reform. It focused on boosting investments in renewables and non-fossil flexibility, reducing energy prices volatility, and protecting consumers from price spikes. The reform introduced support schemes for flexibility and renewable Power Purchase Agreements (PPAs) to foster both public and private investments. In response to price volatility, the European Commission focused on optimising short-term markets by improving liquidity, and on enhancing market access to stable long-term contracts (PPAs and CfDs).

Net-Zero Industry Act

The Net-Zero Industry Act (NZIA), published in March, represented the European Commission's response to

the US Inflation Reduction Act (IRA). Stemming from the Green Deal Industrial Plan, its aim was to encourage the manufacturing of clean technologies in the European Union, technologies that support the clean energy transition. It created the concept of Net-Zero Strategic Technologies, a list of eight key technologies to achieve the EU's climate goals, including batteries and energy storage.

Strategic Technologies for Europe Platform

The European Commission published in June its proposal for the establishment of a "Strategic Technologies for Europe Platform (STEP)", aiming to boost critical strategic technologies and enable the EU's industry to achieve the digital and net-zero transitions. It sought to reinforce and leverage existing EU instruments to





© Kyoto, Norbis Park Heatcube, Denmark

quickly deploy financial support for investments. Additionally, STEP introduced the Sovereignty Seal, serving as a quality label to attract investments, and the Sovereignty Portal, the dedicated website with information for funding opportunities.

Batteries Regulation

The Batteries Regulation was adopted and entered into force in August. The new law encompassed a diverse range of provisions. Its key objectives included reducing the carbon footprint of batteries, minimizing the use of harmful substances, decreasing reliance on raw materials from third countries, and increasing the collection, reuse and recycling of batteries within the EU. The Regulation introduced also the concept of a digital passport with detailed information on each battery.

Critical Raw Materials Act

The European Commission published in March its proposal on the Critical Raw Materials Act, aiming to strengthen the European critical raw materials value chain and safeguard the EU from risks of disruptions to the supply chain. The proposed text intended to diversify the EU's imports of these materials in order to reduce strategic

dependencies, and to ensure their recycling into secondary critical raw materials.

Fit for 55

The Fit for 55 Package, issued in summer 2021, remained a work in progress. Following the Commission's proposal to revise the Renewable Energy Directive (REDIII), a provisional agreement was reached for a binding target of at least 42.5% by 2030, but aiming for 45%. The revised Energy Efficiency Directive (EED) entered into force in October, making it binding for EU countries to collectively ensure an additional 11.7% reduction in energy consumption by 2030. The revision of the Energy Performance of Buildings Directive (EPBD) was discussed during summer and entered the phase of trilogues.

In May, the revised EU Emissions Trading System (ETS) Directive for phase 4 was adopted, and in October, the Carbon Border Adjustment Mechanism (CBAM) entered into its transitional phase, requiring importers to disclose their emissions. In September, the revised Alternative Fuels Infrastructure Directive (AFIR) was adopted, setting mandatory deployment targets for electric recharging and hydrogen re-

fuelling infrastructure across the EU main transport corridors and hubs.

State Aid for Energy Storage

The European Commission revised In March the Temporary Crisis and Transition Framework to temporarily loosen EU State Aid rules, in response to the economic impacts of Russia's war in Ukraine and the US Inflation Reduction Act (IRA). The new Framework gave Member States a great deal of discretion in granting state aid to cover the investment costs of energy storage projects and allowed them to cover large chunks of the investment cost.



EASE Activities in Policy

EASE's Impactful Initiatives in Addressing Sector Challenges. The EASE Secretariat and Task Forces actively engaged in addressing critical economic, technical, and policy matters this year, contributing to significant activity in the energy sector.

Business Viability: Behind-the-Meter Battery Energy Storage Systems, Practical Business Applications and the Evolving Landscape of the Energy Storage Sector

Central to EASE's mission and vital for its members is the theme of business viability. Notably, the EASE Task Force on Behind-the-Meter, in collaboration with Enel X's Ms Lavinia Iamele, conducted a comprehensive analysis of practical business applications and the evolving landscape of the energy storage sector.

The mission was to assess the potential of Behind-the-Meter Battery Energy Storage Systems (BtM BESS), seamlessly integrating them with cutting-edge technologies such as solar photovoltaics (PV). This effort resulted in the report titled "Energizing Europe: Unveiling the Business Opportunities and Taxonomy of Behind-the-Meter Battery Energy Storage Systems."

Battery Energy Storage Solutions (BESS)

In the pursuit of ensuring Battery Energy Storage Solutions (BESS) is best positioned to meet the market demands for a sustainable, circular, and robust value chain, particularly within the framework of the Batteries Regulation, the collaboration between the

Task Force on Sustainable Batteries and the Joint Research Centre of the European Commission proved instrumental to lay down the cornerstone of a robust scientific foundation for precise carbon footprint estimates.

Concurrently, the Task Force on Network Codes focused on enhancing sound network codes, particularly in areas such as demand connection and the specifications governing the connection of generators to the grid. This project aimed to elevate the European power market's efficiency, harmonization, and integration.

The Potential of Thermal Energy Storage: Decarbonisation and Renewables Integration

The EASE Task Force on Thermal Energy Storage, led by Bjarke Buchbjerg of Kyoto Group, aimed to highlight the potential of thermal energy storage.

The resulting policy paper, published in October, positioned thermal energy storage technologies as key in indus-





© Wärtsilä, Giga Storage Buffalo Battery, the Netherlands

trial decarbonisation and the integration of renewable energy by underscoring the multitude of advantages in addressing energy demand, enhancing grid stability, and effectively tackling decarbonisation challenges.

The paper also highlighted real-world applications, compelling business cases, and forward-thinking policy recommendations to highlight the technology's potential.

The seventh edition of the European Market Monitor on Energy Storage (EMMES)

In the realm of market intelligence, EASE collaborated with LCP-Delta to release the seventh edition of the European Market Monitor on Energy Storage (EMMES). This comprehensive report provided detailed data on current installations by customer segment across 24 European countries, along with forecasts up to 2030. The report also delved into key EU legislation, drivers, and barriers for 12 core countries, offering in-depth insights into the electrical energy storage market.

Energy Storage Coalition: EASE, SolarPower Europe, Breakthrough Energy, and Wind Europe

Simultaneously, the Energy Storage Coalition, in partnership with SolarPower Europe, Breakthrough Energy, and Wind Europe, championed that renewables and energy storage go hand-in-hand.

The Coalition's initiatives include encouraging Member States to implement flexibility support schemes, reducing the EU-wide Capacity Market carbon cap, establishing clear definitions for 24/7 renewable Power Purchase Agreements (PPAs), exploring the applications of peak shaving products in energy storage, and advocating for the adoption of a comprehensive EU-wide energy storage strategy.

EASE's Advocacy in Shaping the Future of Electricity Market Design and the Energy Storage Landscape

Much of the EASE Secretariat's diligent work in 2023 focused on the Electricity Market Design. Within the framework of the 2030 and 2050 climate and energy targets, the European Commission published in March a reform proposal for the Electricity Market Design, introducing several positive provisions for the energy storage sector. EASE engaged with policymakers by, among other things, presenting a comprehensive position paper on the topic.

To conclude, throughout 2023, EASE was able to provide its members with valid insights on policy, business, and technical topics. The energy storage sector – and EASE in particular – gained significant visibility, continuing to drive positive transformations in the ever-evolving energy landscape. 2023 could be considered the year in which energy storage properly solidified its role as a driving force in shaping the energy sector's future.



Developments in Funding for Energy Storage and EASE Involvement in EU-funded Projects

Transformative Decade: The Evolution of Energy Storage Recognition in EU Funding Schemes

Over the past ten years, the energy storage community has witnessed a remarkable shift in fortune within EU funding schemes. From being the overlooked, the sector now is recognized thanks to the effort of EASE to convince policy makers that energy storage is an indispensable tool to achieve Green Deal targets.

As we eagerly anticipate 2024, the optimism is not misplaced, fuelled by a substantial surge in funding. The stalwarts of support—Battery European Partnership and Hydrogen Joint Undertaking—are set to continue their vital contributions via Horizon Europe. Beyond these, concrete high Technology Readiness Level (TRL) projects are poised to accelerate the development and deployment of stationary storage solutions.

European Shift towards Technology-Neutral Funding Initiatives

While batteries and hydrogen maintain their prominence in EU funding, a noteworthy shift is occurring. The European Commission is breaking away from exclusive favouritism, recognizing the broader spectrum of storage technologies.

Variety of different energy storage technologies are gaining well-deserved attention, reflecting a commitment to technology-neutral funding initiatives.

The Innovation Fund: An Important Support for the Energy Storage Community

In this landscape, the Innovation Fund emerges as a transformative force for energy storage. Despite initial disappointments in the first two large-scale calls, the tide has turned. The Innovation Fund is now a beacon of support for the energy storage community, awarding significant grants to large-scale projects, with a commitment to continuing this trend in 2024.

The Innovation Fund's influence extends far and wide. Its upcoming





© Fluence, Energy Cells, Vilnius, Lithuania

call, open until early April 2024, is a testament to its inclusive approach. Small, medium, and large-scale projects are all invited to partake in this funding opportunity. This widened scope aligns with the fund's goal to finance a diverse project pipeline, ensuring an optimal balance across various innovative technologies.

The Inclusive Approach of the Innovation Fund

The inclusivity of the Innovation Fund extends to sectors as well. Decarbonization, cleantech manufacturing, maritime, and energy-intensive industries are all within the purview of this funding opportunity. This broad coverage reinforces the commitment of the European Commission to fostering innovation not only in energy storage but across industries essential for a sustainable future.

The application window until early April 2024 signifies an encouraging timeline for potential innovators to submit their proposals. This

transparent and accessible process aligns with the fund's mission to support projects that exhibit maturity in planning, business models, and financial and legal structures.

Furthermore, the European Innovation Council stands as a beacon for breakthrough innovations that may be considered too risky at early stages by conventional investors. This dual-pronged approach—through the Innovation Fund and the European Innovation Council—underscores the commitment of the European Commission to nurturing groundbreaking advancements in energy storage technologies.

The Future of the Energy Storage Sector as the Forefront of Transformative Change

As we cast our gaze toward 2024, the energy storage sector finds itself not just on the receiving end of funding but at the forefront of transformative change. The diversified funding

initiatives, coupled with an inclusive approach in the Innovation Fund's upcoming call, weave a narrative of sustained commitment to innovation. The energy storage community is not just witnessing evolution; it is actively shaping the future of sustainable energy in Europe.



Energy Storage Global Conference 2023

The sixth edition of the Energy Storage Global Conference (ESGC) organized by EASE took place on 10 – 12 October 2023 as a hybrid event at Hotel Le Plaza in Brussels.

Built on the foundations of five successful conferences organised since 2014, the three-day event gathered over 380 energy storage professionals, researchers, exhibitors, speakers, and policymakers, both onsite and online. Participants had the chance to hear insight from over 60 speakers on how the energy storage sector is growing and must evolve as it represents the bridge to achieve energy targets set for 2030 and 2050.

Representatives from around the world came together for three days to discuss the latest developments on energy storage technologies, regulatory and policy frameworks, and the future energy storage market. The conference kicked off with a keynote speech by Anne Weidenbach from the European Commission who remarked that “Energy storage and flexibility services have moved from the background of the energy sector to the forefront” and that “we cannot succeed in the renewable energy goals without flexibility services and energy storage” highlighting the need to become an integrated part of the energy systems in all member states and globally.

The second day proceeded with presentations on the Net-Zero Industrial Act and its potential to transform European manufacturing. Panel discussions addressed also a variety of specific topics: project financing,

long-duration energy storage technologies, 24/7 Power Purchase Agreements, and developments in European energy storage markets. Esmeralda Colombo from the CMCC Milan, stated that “We need to avoid relying on instrument that we have always known”, highlighting the importance to invest in new technologies to achieve the climate targets.

During the third day, several panel discussions took place, focusing on critical raw materials supply, industry decarbonisation, and how to ensure safety in battery energy storage systems. Piotr Szymański, Director at the European Commission’s Joint Research Centre, opened the third day of the conference, pointing out that “thermal energy storage is expected to have a very important role in the energy transition since heating and cooling are half of the EU’s energy consumption.”

ESGC 2023 gained support from 14 sponsors – Enel X, Jinko Solar, SLB, EDF, ENGIE, enspired, EVE, Hithium, Huawei, SPP Development Ukraine, INTILION, LDES, Saft and Kyoto and 10 partners - AEPIBAL, AKU BAT-CZ, APSTE, BEPA, EnergyIN, Energy Storage Coalition, Energy Storage News, Flow Batteries Europe, REVOLVE and Smart Energy International.

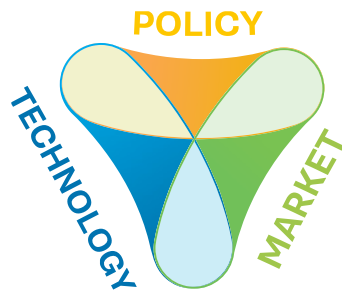
The conference was also enriched by 16 exhibitors – Aalto University School of Electrical Engineering, Enel X, EDF,

ENGIE, enspired, EVE, HITHIUM, HUAWEI, INTILION, Jinko Solar, LCPDelta, LDES, Saft, SLB, SPP Development Ukraine and Xtralis.

This edition of the Energy Storage Global Conference provided valuable insights on energy storage and showcased itself as a leading event for the industry giving access to current knowledge and important contacts in the field.

“

Participants had the chance to hear insight from over 60 speakers on how the energy storage sector is growing and must evolve as it represents the bridge to achieve energy targets set for 2030 and 2050.



ENERGY STORAGE

Global Conference

BRUSSELS, 15 - 17 October 2024

PARTICIPANTS

400+

Energy storage professionals and representatives from the European Institutions.

SPEAKERS

60+

Suppliers, Utilities, DSOs, TSOs, Project Developers and Consultancies active in the energy storage sector.

SPONSORS AND EXHIBITORS

30+

Increase the visibility of your company before, during and after the conference!

Cannot wait for the next ESGC edition? Save the date! The seventh edition of the Energy Storage Global Conference will take place on 15 - 17 October 2024 at the Hotel Le Plaza, Brussels.

POLICY - DAY 1

Discuss Electricity Market Design, grids, flexibility assessment, support schemes and public financing with policymakers, National Regulatory Authorities, and speakers from around the globe.

MARKET - DAY 2

Hear about new projects financing, business models, LDES, learn how to optimise storage assets and identify

more opportunities in opening markets for investments in energy storage.

TECHNOLOGY - DAY 3

Discover the European manufacturing competitiveness with its supply chain and raw material, the latest cutting-edge energy storage technologies and hybridisation and engage in thorough, technical discussions with leading experts driving storage technology development.

Sponsors and exhibitors

Join us as a sponsor/exhibitor at the Energy Storage Global Conference 2024, gain visibility, showcase your products and spread your message among the most relevant energy storage stakeholders!

Contact us to see which package best suits your objectives.



#ESGC2024

For more information visit
www.esgc.org



What to Expect in 2024?

A pivotal year for energy storage. EASE forecasts 2024 as a landmark year for energy storage, propelled by the surge in renewable energy and the European Commission's pledge to bolster investments in power grids. The upcoming 2024 European elections will be a decisive moment for the European Union to demonstrate its responsiveness to the climate and security of supply challenges.

Sustaining momentum: advancing previous initiatives

In the first half of 2024, several policy files from 2022 and 2023 will be completed. A final agreement on the revision of the EU Electricity Market Design is expected by the end of 2023 or the first quarter of 2024 - EASE will be closely monitoring the emergence of new capacity markets in 2024. The Parliament and Council have reached consensus on the final text of the Critical Raw Materials Act, which now awaits formal approval from both institutions.

The Net-Zero Industry Act is set to enter trilogues soon and is likely to be prioritised for conclusion before the elections. Additionally, the trilogues discussions for the European Hydrogen Bank are underway, with a tentative Parliament plenary session scheduled for the first quarter of 2024. The Energy Performance in Buildings Directive is in the final phase of trilogue discussions, and several pro-

visions were agreed upon such as the scope of the Directive and smart readiness indicators. The next trilogue, which might be the concluding one, is scheduled for the last quarter of 2023.

The non-legislative Wind Power Action Plan was rolled out and aims at bolstering Wind Power development in Europe by expediting permitting procedures and securing investments in renewables. The Action Plan for Grids, unveiled in the fourth quarter of 2023, outlines a set of initiatives, including provisions for energy storage, which the Commission plans to implement over the forthcoming 18 months. EASE is committed to observing the outcomes of these initiatives in the upcoming year and providing regular updates to its members.

Overview of the new initiatives

In line with its work programme, the European Commission is expected to announce a non-legislative EU climate target for 2040 in the first quar-





© EDF, Revin Pumped Storage Power Plant, Champagne Up Est, Ardenn

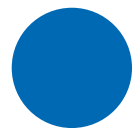
ter of 2024. Additionally, the Commission will concentrate on substantial proposals and initiatives aimed at streamlining reporting requirements and conducting evaluations and fitness checks. These initiatives aim to ensure that the European Union stays on course to achieve climate neutrality by 2050.

Moreover, the Commission remains steadfast in its pledge to assist all Member States in expediting the execution of their Recovery and Resilience Plans. Besides, all Member States are engaged in revising their National Energy and Climate Plans. This revision process is anticipated to be finalised by the middle of 2024.

Also, the non-legislative initiative, “Advanced Materials for Industrial Leadership,” is scheduled for the first quarter of 2024 and aims to boost EU’s competitiveness. The Commission’s focus in 2024 will be on the implementation the electricity market reform, initiating the EU hydrogen market, and accelerating the growth of renewable energy sources with the aim to build a decarbonised, flexible, and cost-efficient energy system.

Looking forward to 2024

The energy storage industry will undergo significant changes in the upcoming year, with the EU elections and several exciting legislative and non-legislative initiatives on the horizon. In 2024, we plan to increase in-person collaborations with our members through general assembly meetings, committees, and events. As the importance of energy storage in the energy transition becomes more apparent, EASE is committed to continue its efforts to shape a promising future for the energy storage value chain.





Closing by EASE Secretary General



Patrick Clerens
EASE Secretary General

It is with a mix of satisfaction and excitement for the future that EASE takes a look at its achievements for this annual wrap-up. In 2023, EASE embraced several opportunities, and sustained its position as the main European advocate for energy storage in the continent's energy landscape.

Energy storage is now an established technology concretely supporting Europe's transition towards its climate and energy goals. What was once a promise on the horizon has materialised into a dynamic reality, a technological solution making a difference. The dynamism of the energy storage sector calls for policies that match its speed - a task we have embraced since EASE's founding.

Continued membership growth stands as evidence of the good work of the association and that more and more industry players have confidence in our mission. Every new member brings a set of different skills and insights into the storage market that enriches the association.

The Energy Storage Coalition and the Energy Storage Global Conference

This year, the launch of the Energy Storage Coalition with other energy stakeholders further demonstrated energy storage's relevance to the wider cleantech sector. The Energy Storage Global Conference saw stronger participation than ever, a testament to the successful collaboration between EASE and key stakeholders. This col-

laborative spirit is not just symbolic; it is the essence of our progress—a shared will to tackle the challenges that lie ahead with inclusive solutions. The ESGC is approaching its first decade and is now the flagship event for the energy storage industry to showcase its vitality to policymakers.

Advocacy and Policy Work by EASE

EASE's policy activities in 2023 focused on the revision of the European Electricity Market Design and demonstrated the association's ability to foster collaboration on a wide range of topics involved with Europe's latest reform of its energy system.

The association's advocacy efforts influenced several provisions and aligned them with its vision of resilient and sustainable energy markets supported by energy storage. As policymakers continue to grapple with global conflicts and competitiveness shifts, EASE has been meeting this context head-on, proactively engaging with developments, and showcasing the strategic relevance of our sector. Looking back, this year was a successful one, despite its challenges.



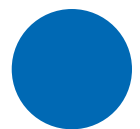
Mr Patrick Clerens, EASE Secretary General, at the Energy Storage Global Conference 2023

What's next in 2024?

With the next European Union presidency hinting at a regulatory pause in the energy field, EASE is planning to increase its focus on implementation at both the EU and national levels. This reflects EASE's commitment to proactively engage with the evolving regulatory landscape, ensuring that energy storage policies are not only formulated but also effectively implemented to enable our sector to deliver its potential.

As we enter a new year, we echo our industry's message with a louder voice than ever: future-proof policies must be implemented to meet the pulse of technological innovation. The steadfast support of its members, the collaborative spirit with policymakers, and the resilience of our industry are the pillars of this voice.

In closing, I extend my heartfelt gratitude to all EASE members, policymakers, and stakeholders who have contributed to the success of 2023. I would also like to express my gratitude to the board and the presidency who have dedicated significant efforts to our association and wish the best upon new and renewed mandates. I am inspired by our community's work on a wide range of storage technologies and look forward to our successful cooperation in 2024. Together, we are poised to have a successful year ahead.





EASE Structure and Organisation

2023 - 2025

General Assembly

Executive Board

President
David Post (Enel X)

Vice-Presidents
Olivier Didry (EDF)
Michael Lippert (Saft)
Julian Jansen (Fluence)

Treasurer
Carla Barrera (SLB)

Secretary
General
Patrick Clerens



As a non-profit association, EASE is governed by an Executive Board elected by the members of the General Assembly and has several bodies dedicated to the various aspects of energy storage and the associated challenges and opportunities.

The **EASE presidency** is currently held by Mr David Post, Head of Energy Storage Solutions at Enel X. This is the second mandate as EASE President and we are looking forward to the years to come. He is supported in his function by three Vice-Presidents: Mr Michael Lippert (Saft), Mr Olivier Didry (EDF) and Mr Julian Jansen (Fluence). Additionally, Ms Carla Barrera (SLB) will cover the position of Treasurer.

The work of EASE presidency is supported by three Committees:

The **Technology and Value Assessment Committee (TVAC)**, chaired by Mr Karim Sidi-Ali-Chérif (CEA), aims to deliver the necessary data for supporting all EASE positions and interactions with external stakeholders.

The **Strategy Committee (STC)**, chaired by Mr Miguel Garagorri (Iberdrola), advises and supports the Executive Board on policy-strategic issues affecting the storage industry, defines and promotes a fair market design for all the services provided by energy storage. It also contributes to the issue management process, including the representation on identi-

fied topics, as well as, to the advocacy processes in the specific field of responsibility.

The **Communications Committee (COMC)**, chaired by Mr Luca Camunoli (EDF), defines and implements the EASE communication strategy in terms of target audience, content, and media.

The **General Assembly** and the **Executive Board** are responsible for all association-wide decisions, whereas the Committees and the underlying Coordination Group, Working Groups and Task Forces are involved in topic-specific decisions and tasks.

EASE Secretariat



Patrick Clerens
EASE Secretary General

Policy Team



Jacopo Tosoni
Head of Policy



Martin Roach
Senior Energy
Analyst



Margareta Roncevic
Policy Officer



Tony Kim Yeat
Junior Policy
Officer

Communication Team



Elina Cirule
Communications
Officer



**Lou-Naëma Fischer-
Angoulvent**
Junior Communications
Officer

Project Management Team



Thomas Otuszewski
Project Officer



Become a Member

EASE was established in 2011 and currently represents over 70 members including utilities, technology suppliers, research institutes, distribution system operators, and transmission system operators. Together, EASE members have significant expertise across all major storage technologies and applications.

Members' benefits



• Advocacy

EASE is actively shaping the legal and R&D funding framework for energy storage at EU level. Members gain direct influence in the EU decision-making process.

• R&D and EU-funded projects

Members benefit from EASE's expertise and technical know-how, and they can participate in EU-funded research projects.

• Market intelligence

Members receive timely information and data about future market developments that can help them adapt to the changing business environment.

• Visibility and networking

Featuring in EASE's publications and events, such as the Energy Storage Global Conference, gives members the opportunity to gain visibility and to strengthen their network among storage experts.

○ **Get connected**
Become a member

Membership Categories

Regular

Organisations involved in energy storage activities in Europe such as utilities, grid operators (TSOs and DSOs), equipment and technology manufacturers, and R&D organisations.

Consultancies

Consultancies involved in energy storage activities.

Start-ups

Start-ups developing energy storage technologies are allowed to join EASE at a discounted rate compared to regular members.

Associations

Associations involved in energy storage, directly or indirectly, at EU national or European level. Only secretariat personnel can be directly involved in EASE.

Associate

Any organisation that does not fulfil the requirements to become a Regular Member with activities relevant to energy storage.

Members Benefits

	Executive Board*	General Assembly	Committees	Working Group
Regular	✓	✓	✓	✓
Regular-R&D	✓	✓	✓	✓
Consultancy	✗	✓	✓	✓
Start-up	✗	✓ **	✓	✓
Association	✗	✓	✓	✓
Associate	✗	✓ **	✗	Upon Invitation

Upon joining, EASE members pay a one-off contribution to the working capital of EASE, which amounts for 10% of the annual membership fee. Associate members and consultancies must commit to joining EASE for a minimum of 3 years, with a one-time payment of all registration fees. More details on the EASE Statutes available on the EASE website.

* Elective position

** No voting rights



EASE Members



Contacts

Aarhus University

Nordre Ringgade 1
8000 Aarhus
Denmark
+45 8715 0000
www.au.dk/

AEPIBAL

Gran Via de les Corts
Catalanes, 774, 4^o
08013 Barcelona
Spain
+34 93 182 88 00
www.aepibal.org/

Austrian Institute of Technology

Giefinggasse 4, 1210 Vienna,
Austria
+43 50 550 0
www.ait.ac.at

APREN

Avenida da República,
59 – 2^o andar,
1050-189
Lisboa, Portugal
+351 213 151 621
www.apren.pt

BASF

Carl-Bosch-Straße 38
67063 Ludwigshafen am Rhein
+49 (0)621 60-0
www.basf.com

BayWa r.e.

Arabellastrasse 4, 81925 Munich,
Germany
+49 89 383932 0
www.baywa-re.de

Blue Solutions

Odet 29500 Ergué Gébéric,
France
+33 2 98 66 72 00
www.blue-solutions.com

Carbon Clean Technologies

Widdersdorfer Str. 21 7a, 50825
Köln, Germany
+49 (0)221 355 755-0
www.carbonclean.de

CATL

No. 2, Xingang Road
Zhangwan Town, Jiaocheng
District
Ningde, Fujian
P.R. China
+86 0593-8901666
www.catl.com/en/

Consortium for Battery Innovation

Bravington House, 2 Bravingtons
Walk, London, England
+44 207 833 8090
www.batteryinnovation.org

CEA Liten

17 Avenue des Martyrs
38000
Grenoble, France
+33 4 38 78 44 00
www.liten.cea.fr/cea-tech/liten

CellCube

IZ NÖ-Süd Straße 3, Objekt M36
AT-2355 Wiener Neudorf, Austria
+43 2236 379 0000
www.cellcube.com

CENER

Ciudad de la Innovación, 7
31621 Sarriguren (Navarra), Spain
+34 948 25 28 00
www.cener.com

CIRCE

Campus Río Ebro. Mariano
Esquillo Gómez, 15
50018 Zaragoza Zaragoza
Spain
+34 976 761863
www.fcirce.es

Cobra

Calle Cardenal Marcelo
Spinola 10 y 6
28016 Madrid
Spain
+34 91 456 95 00
www.grupocobra.com

Corre Energy

Helperpark 278-3
9723 ZA
Groningen
The Netherlands
+31 50 799 5060
www.corre.energy

DNV

Veritasveien 1
1363 Høvik
Norway
+47 67 57 99 00
www.dnv.com

E2S Power AG

Haslenstrasse 4, CH-8832
Wilten b. Wollerau, Switzerland
+41 (0)56 222 8009
www.e2s-power.com

EDF

22-30 Avenue de Wagram,
75008 Paris,
France
+33 1 40 42 22 22
www.edf.fr

EDP Renewables

Serrano Galvache 56
75008 Paris,
France
+34 90 283 0700
www.edpr.com

ElectroFleet

Rheinstrasse 82, 49090
Osnabrück
+49 172 424 1760
<https://electrofleet.com/>

Elpedison

6 Fragkokklisias str.
15125, Marousi
Greece
+30 2103441100
<https://www.elpedison.gr/en/>

Enel

Viale Regina Margherita
137,00198
Rome, Italy
+39 0683051
www.enel.com

Energiasalv

Regati puisteel 1, 11911
Tallinn, Estonia
www.energiasalv.ee

Energy Storage NL

Postbus 20122
7302 HC APELDOORN
Netherlands
+31 (0)79 353 11 00
www.energystoragenl.nl

Energy Vault

4360 Park Terrace Drive, Suite
100, Westlake Village, CA 91361
United States
091 910 05 10
<https://www.energyvault.com/>

Engie

1 place Samuel de Champlain,
92400
Courbevoie, France
+33 1 44 22 00 00
www.engie.com

Ensired

Meischlgasse 13, 1230 Vienna,
Austria
<https://www.ensired-trading.com/>

Eunice Energy Group

32 Nymphenburger Str.
D-80335 Munich
Germany
+49 8951661979
www.eunice-energy.com

Evapco Europe

Heesterveldweg 19,
Industrieterrein Oost, B-3700
Tongeren, Belgium
+32 12 395029
www.evapco.eu

Fluence Energy LLC

4601 N. Fairfax Drive
Suite 600
Arlington, VA 22203
United States
+1-833-358-3623
www.fluenceenergy.com

Form Energy

30 Dane St.
Somerville, MA 02143, USA
1 (844) 367-6462
<https://formenergy.com/>

Freyr AS

Nytorget 1,
4012 Stavanger
Norway
www.freyrbattery.com

GE Renewables

4 Rond-Point du Pont de
Sèvres
92100 Boulogne-Billancourt
France
+33 240 411 591
www.ge.com/renewableenergy

Geyser Batteries Oy

Maria 01
Lapinlahdenkatu 16
00180 Helsinki
Finland
www.geyserbatteries.com

GIGA STORAGE

Amstelzijde 85A
1184 TZ
Amstelveen
The Netherlands
+31 027858040
<https://giga-storage.com/nl/>

Gravitricity

128 Pitt Street, Edinburgh,
Scotland
+44 131 554 6966
www.gravitricity.com

Highview Power

Pennine Place
2A Charing Cross Road
London WC2H 0HF,
The United Kingdom
+44 203 350 1000
www.highviewpower.com

HITIUM

Deutschland CmbH
Landsberger Str. 155
80687 Munich Germany
+49 152 2809 5468
<https://hithium.com/en/contact>

Hungarian Battery Association

H-1111 Budapest, Bertalan
Lajos u. 2
+36309848720
<https://www.hu-ba.hu/eng/>

Iberdrola

Plaza Euskadi, 5
48009 Bilbao, Spain
+34 944 151 411
www.iberdrola.com

Innolith

Hirzbodenweg 95
4052 Basel, Switzerland
+41 61 317 90 41
www.innolith.com

Jinko Solar

Langelinie Allé 35
DK-2100 København Ø
Denmark
<https://jinkosolar.eu/>

KOMAG

Pszczynska 37
44-101 Gliwice, Poland
+48 32 2374600
www.komag.eu

Kyoto Group

Fornebuveien 1,
1366 Lysaker, Norway
www.kyotogroup.no

LG Energy Solution

Lyonerstraße 15
60528 Frankfurt am
Main, Germany
+49697104450
www.lgchem.com

Malta INC

One Broadway, 14th Floor
Cambridge, MA 02142, England
+34-639789816
www.maltainc.com

Mitsubishi Power Europe

Schifferstrasse 80, 47059
Duisburg, Germany
+49 2038038611950
<https://power.mhi.com/regions/emea/>

Morrow Batteries

Havnegaten 2, 4836 Arendal,
Norway
www.morrowbatteries.com

Naturgy

Plaça del Gas, 1
ES-08003 Barcelona,
Spain
+34 934025616
www.naturgy.com

NEK Bulgaria

Veslets 5, Sofia, Bulgaria
+359 2 926 3636
www.nek.bg

NGK Europe

Westerbachstrasse 32, 61476
Kronberg in Taunus, Germany
+49(0)61739930
www.ngk-insulators.com

Northvolt

Alströmergatan 20, SE – 112 47
Stockholm, Sweden
(+46) 76 130 94 27
<https://northvolt.com/>

Piritium S.A

Kapodistriou Av. 38-40, Marousi,
151 23, Attica, Greece
www.piritium.weebly.com/
contact.html

PPC S.A.

30 Chalkokondylii Str.
10432, Athens
Greece
210 52930301
www.dei.gr/en

RTÉ

7C place du Dôme, 92800
Puteaux, France
+33 1 79 24 80 00
www.rte-france.com

Saft

26 quai Charles Pasqua, 92300
Levallois-Perret, France
+33 1 58 63 16 00
www.saftbatteries.com

Samsung SDI

Reichenbachstraße 2
85737 Ismaning, Germany
+49 89 929277 9920
www.samsungsdi.com

Siemens Energy

Freyeslebenstraße 1, 91058
Erlangen, Germany
+49 9131 840
www.siemens-energy.com

SLB

42 Rue Saint Dominique, 75007
Paris
France
+33 1 40 62 10 00
www.slb.com

Socomec

Route de Westhouse 67230
BENFELD
+33388574141
<https://www.socomec.com/>

SPP Development Ukraine

s01021, Kyiv, 7 Klovskyi Uzviz,
BC "Carnegie Tower", floor 6,
office 7
+380 (98) 709 1 6 82
<https://sppdevelopment.com.ua/>

SQM International

Houtdok-Noordkaai 25A, 2030
Antwerpen, Belgium
+3232039700
www.sqm.com

Sumitomo SHI FW

Metsänneidonkuja 1002130
Espoo, Finland
+3581039311
www.shi-fw.com

Sungrow Deutschland

Balanstrasse 59, 81541 Munich,
Germany
+44 7535905908
<https://en.sungrowpower.com/>

Texel Energy Storage

Kungsgatan 48 A, 411 15
Gothenburg, Sweden
+46 31700000
www.txles.com

TNO

PB Box 80015
3508 TA Utrecht
The Netherlands
+31 888666516
www.tno.nl

TotalEnergies

2 Pl. Coupole Jean Millier 92400
Courbevoie, France
+33 (0)1 47 44 45 46
www.totalenergies.com

Unda Engineering Inc.

Şemikler Mah. Ordu Bulvarı
Ahmet Piriştina Kültür Merkezi
No. 210 35560 Karşıyaka - Izmir
Turkey
+90 535 6228257
www.undaengineering.com

Uniper

Holzstraße 6 40221 Düsseldorf,
Germany
+4921145793570
www.uniper.energy

UTB Tomas Bata University

Náměstí T. G. Masaryka 5555,
760 01 Zlín,
Czech Republic
+420576032222
www.utb.cz

Voith Hydro

Alexanderstrasse 11, 89522
Heidenheim, Germany
+49 7321377000
www.voith.com

Wärtsilä Finland

Järvikatu 2-4, 65100 Vaasa,
Finland
+358 10 709 0000
www.wartsila.com

Xtralix

Skipped Hill Lane, Bracknell,
RG12 1EB, United Kingdom
+44 (0)1442 242 330
www.xtralix.com



**European Association
for Storage of Energy**

Avenue Adolphe Lacombé 59/8
BE - 1030 Brussels
www.ease-storage.eu

Phone +32 (0) 2 743 29 82
Twitter @EASE_ES
info@ease-storage.eu

