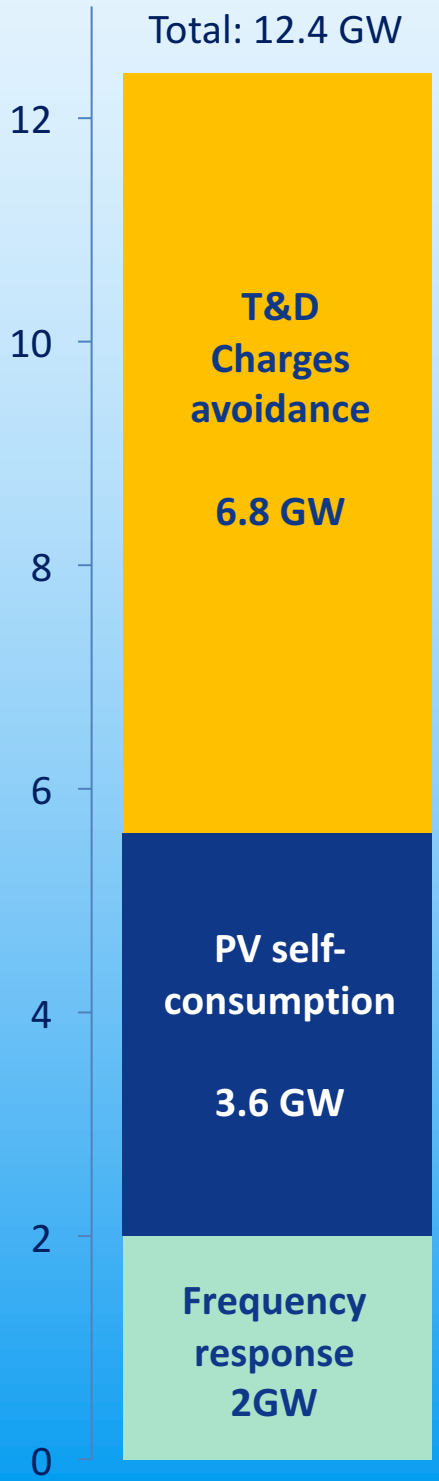
CLEANHORIZON
The Energy Storage Experts

Market Segment Watch: Great Britain

The largest European market for energy storage

GB addressable energy storage market as of 2017 (in GW)



- **12.4 GW of addressable market for energy storage in GB as of 2017**
- **42 figures to understand how to address this large market**
- **43 pages to understand the current regulatory changes:**
  - **Future frequency response tenders**
  - **Changes in the T&D charges computation methodology**
  - **Capacity market rules**
- **6 business cases for storage behind the meter**

Report price:

1 200€ early bird price – before 22nd September

1 500€ standard price

(sales tax not included)

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Market Segment Watch: Great Britain - 2017

The largest European energy storage market

Clean Horizon, the European expert team on energy storage since 2009, released its new market segment watch on Great Britain.

The Great British energy storage market took off in summer 2016 with the launch of a 200 MW frequency response tender (named Enhanced Frequency Response). This summer, National Grid announced that it will reshape its frequency response services and that the new products should be launched in April 2018. Since the EFR tender, the capacity market auction has also awarded more than 500 MW of capacity agreements to energy storage systems, thus justifying the large appetite of developers.

This report analyses the current situation for energy storage in Great Britain (addressable market, potential bidding strategies) as well as current and future business cases for storage behind the meter (both for C&I and residential customers).

There are currently five main revenue streams for energy storage in Great Britain:

- Providing frequency regulation services: sub-second like the enhanced frequency response tender or primary response similar to frim frequency response.
- Increasing residential solar self-consumption
- Reducing the transmission and distribution network charges for commercial and industrial customers
- The capacity market, which provides long term and regular revenues
- The balancing mechanism, which is a balancing market on which the spread are increasing

Key questions addressed:

- How does the GB energy market work?
- What are the revenue streams for energy storage assets?
- How can energy storage systems stack revenue streams in the UK?
- What are the emerging business cases for energy storage projects in GB?

Who needs this report?

- Energy storage equipment manufacturers
- Integrators looking at the GB market
- Project developers willing to better understand the GB market
- Investors willing to better understand the risks associated with storage and the revenue streams
- Utilities looking for opportunities with energy storage
- Commercial and industrial electricity consumers

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Detect, analyze, monetize

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List of figures

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