



**DELTA-EE**



# EUROPEAN MARKET MONITOR ON ENERGY STORAGE

## LATEST STATUS AND TRENDS IN EUROPE

**March 2021**  
Edition 5.0

**Brittney Elzarei**  
+32.2.743.29.82  
[b.elzarei@ease-storage.eu](mailto:b.elzarei@ease-storage.eu)

**Robin Adey-Johnson**  
+44 (0)131 285 1765  
[robin.adey-johnson@delta-ee.com](mailto:robin.adey-johnson@delta-ee.com)

# 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 2021



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 annual EMMES report can be purchased by non-members for €5,000.

The fifth edition EMMES 5.0 report updates and extends the previous report (EMMES 4.0) published in March 2020:

- 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 2021
- Summary of recent market developments
- Latest update and status of EU policy developments
- Market hot topic: for EMMES 5.0 this focuses on electricity system network charges

For more information and to purchase, please contact:

Brittney Elzarei (EASE)  
+32.2.743.29.82

[b.elzarei@ease-storage.eu](mailto:b.elzarei@ease-storage.eu)

Robin Adey-Johnson  
+44 (0)131 285 1765

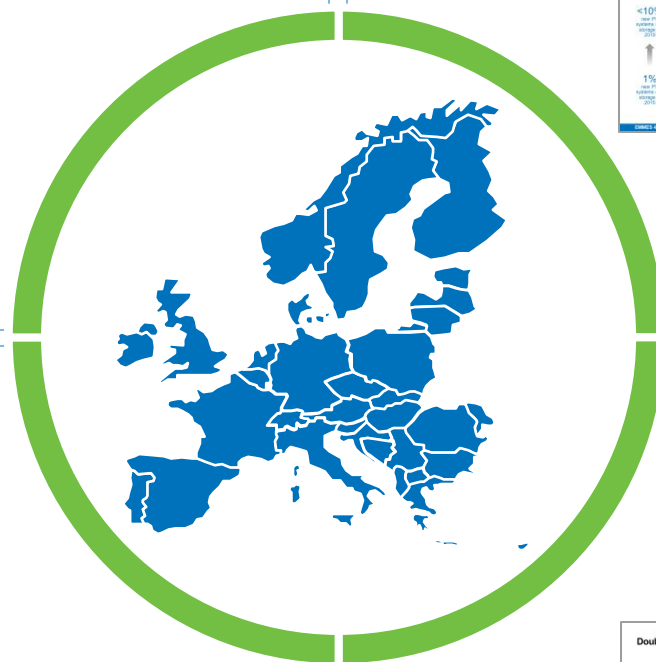
[robin.adey-johnson@delta-ee.com](mailto:robin.adey-johnson@delta-ee.com)

# EMMES 5.0 report

## March 2021

### 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

Residential

Commercial/Industrial

Front-of-Meter

### Extended summary of the overall status and trends across Europe

### Market Hot Topic: electricity system network charging

# EMMES 5.0 market data and forecasts

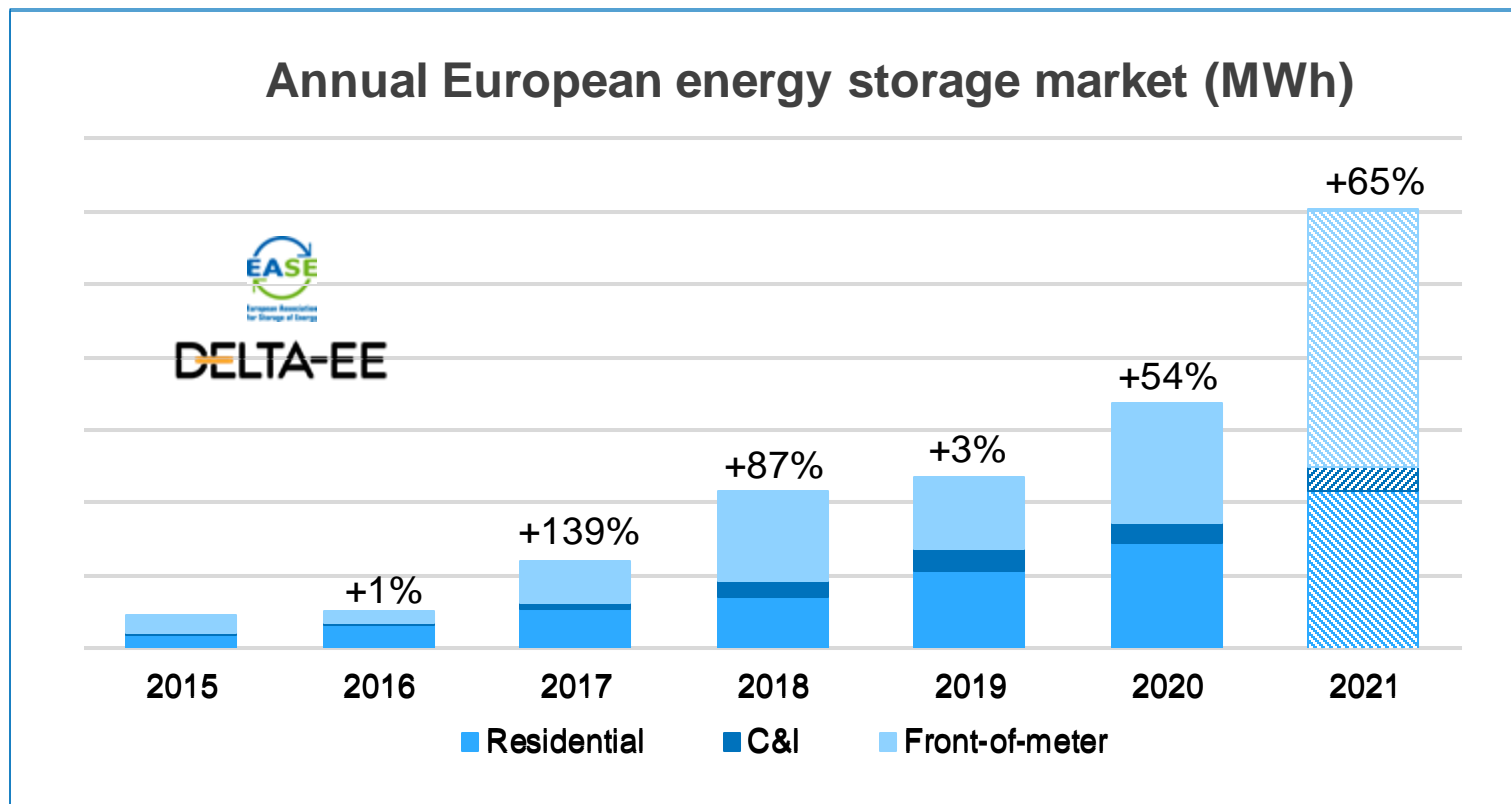
## Electrical energy storage\*

**8.3 GWh**  
2021

↑

**0.6 GWh**  
2015

Cumulative  
installed base



\* The analysis in EMMES 5.0 focuses on stationary electrical, electrochemical and mechanical storage (with the exception of pumped hydro storage).

# Table of contents

<b>Summary of the Storage Market in Europe</b>	<b><a href="#">04</a></b>	<b>Regional Markets</b>	<b><a href="#">38</a></b>
Trends	<a href="#">05</a>	Central/Eastern Europe	<a href="#">39</a>
Country-by-country developments	<a href="#">06</a>	Iberia	<a href="#">43</a>
		Nordics	<a href="#">47</a>
<b>European Policy Update</b>	<b><a href="#">09</a></b>	<b>Market hot topic: network charging</b>	<b><a href="#">51</a></b>
<i>Clean Energy Package implementation by EU Member States</i>			
<b>Country Markets</b>	<b><a href="#">19</a></b>	<b>Appendices</b>	
France	<a href="#">20</a>	Overview of smaller C&I storage markets	<a href="#">58</a>
Germany	<a href="#">23</a>	Pumped hydro storage market (2018)	<a href="#">59</a>
Italy	<a href="#">27</a>		
United Kingdom	<a href="#">30</a>		
<b>Other Notable Countries</b>	<b><a href="#">34</a></b>		
Belgium	<a href="#">35</a>		
Ireland	<a href="#">36</a>		
Netherlands	<a href="#">37</a>		