



CLEAN**HORIZON**

The Energy Storage Experts



Executive Summary

This month's Update From the Field reports two key regulatory changes in Great Britain and in the French islands for centralized energy storage systems. Simultaneously, South Australia is looking to procure renewable power plants as well as energy storage systems to increase their firm capacity and to guarantee grid stability. The results of the latest PV plus storage tender in the French islands has also been announced.

This month, over 200 MW of energy storage projects were announced, with eight renewable projects collocated with storage: the 50MWh Concepcion Tarlac project in the Philippines coupled with a solar farm and the 40MWh Deepwater project coupled with a wind farm in Massachusetts are the largest projects announced this month. Additionally, two tenders organized by governmental bodies are open for storage systems in Australia and Ontario, Canada.

With one wind plus storage project which was announced and a key regulatory impacting storage business in the (very) short-term, the French islands are the subject of our Focus of the month. We thus focus on the three existing business cases for storage in these geographies:

1. Centralized energy storage systems under the new methodology
2. PV plus storage systems and the analysis of the latest RFP results
3. The feed in tariff for wind plus storage systems

Clean Horizon estimates that the French islands market will grow from current 49MWh of energy storage capacity installed to approximately 140MWh in 2020, confirming its status as a "solid" niche market.



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