

From Pipelines to Projects

The role of policies, prices and partnerships

JON FERRIS
HEAD OF FLEXIBILITY AND STORAGE
SEPTEMBER 2023

Support across your investment journey

Enabling you to build a successful storage business, from market entry through to operation



Training

Energy system training courses

Familiarise your team with the fundamentals of investing in & operating storage assets, including key risks & opportunities across Europe, in the energy transition

Bespoke training

We will work with you to deliver bespoke training for your business need



Subscription research services

European Storage Research Service

Keep ahead of key trends and issues, and identify strategic opportunities in the energy storage market across Europe.

European Flexibility Research Service

Data-driven market analyses to best identify emerging markets, strategies and propositions for flexibility across Europe



Data products & software services

Enact

Real time trading and optimisation support for battery optimisers, and leaderboards and asset performance analysis to track competition.

STOREtrack

Identify opportunities in energy storage across Europe, deep dive into projects and companies and help answer key strategic questions.

FLEXtrack

Real time and historical tracking of the value of ancillary markets across Europe, to quantify the value of flexibility in each market.



Bespoke consulting

Market entry strategic advice

Tailored strategic advice on market entry and sizing across Europe.

Due diligence and revenue forecasting

Detailed, bottom-up revenue forecasts for GB and Irish BESS assets used to inform investment strategy and support project finance.

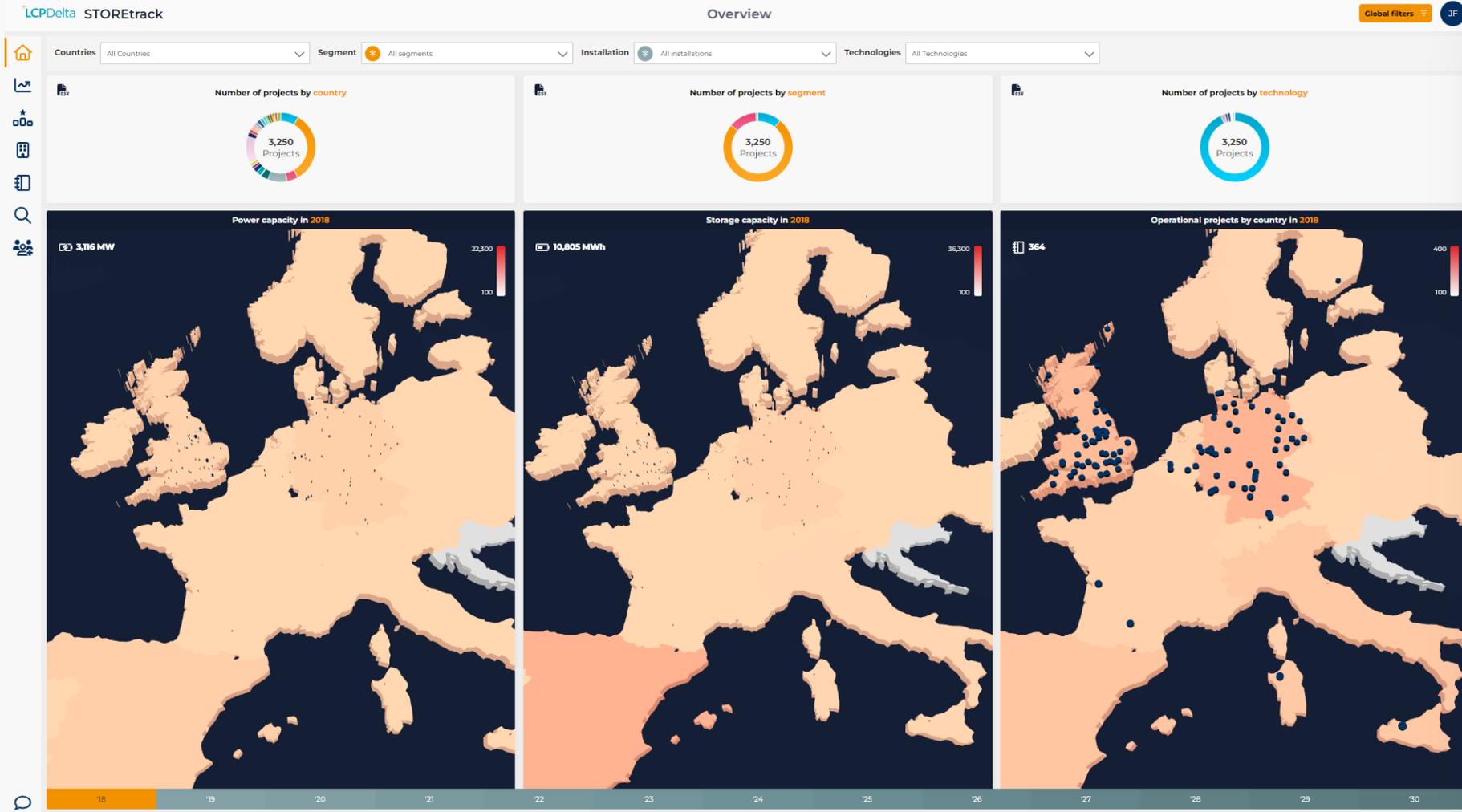
Site and technical characteristic selection support

Understand the impact of locations, co-location options, duration and more on your BESS asset

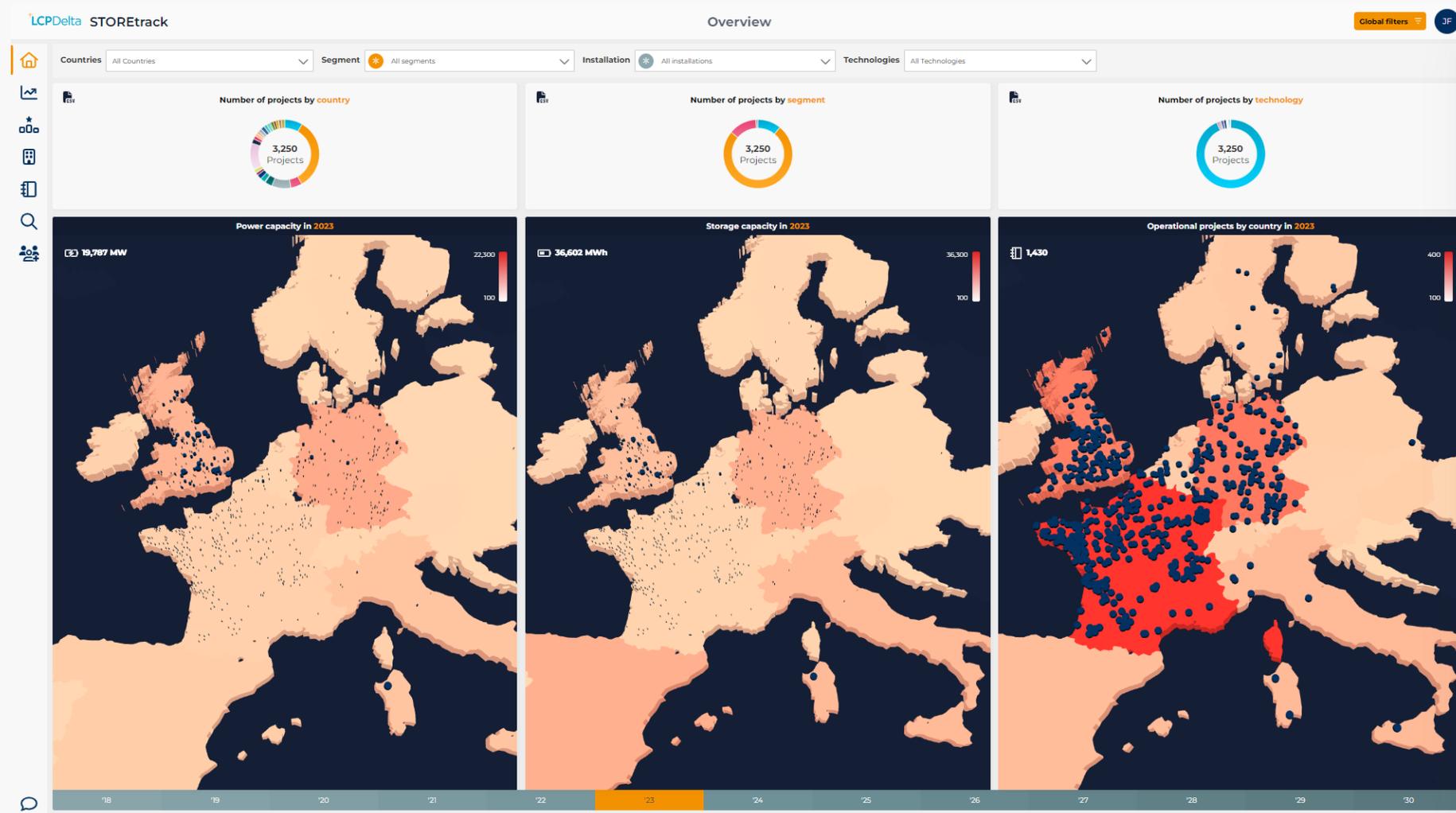
Economics services

Providing strategic insight into commercial decisions, delivering expert market analysis, and assessing policy impacts

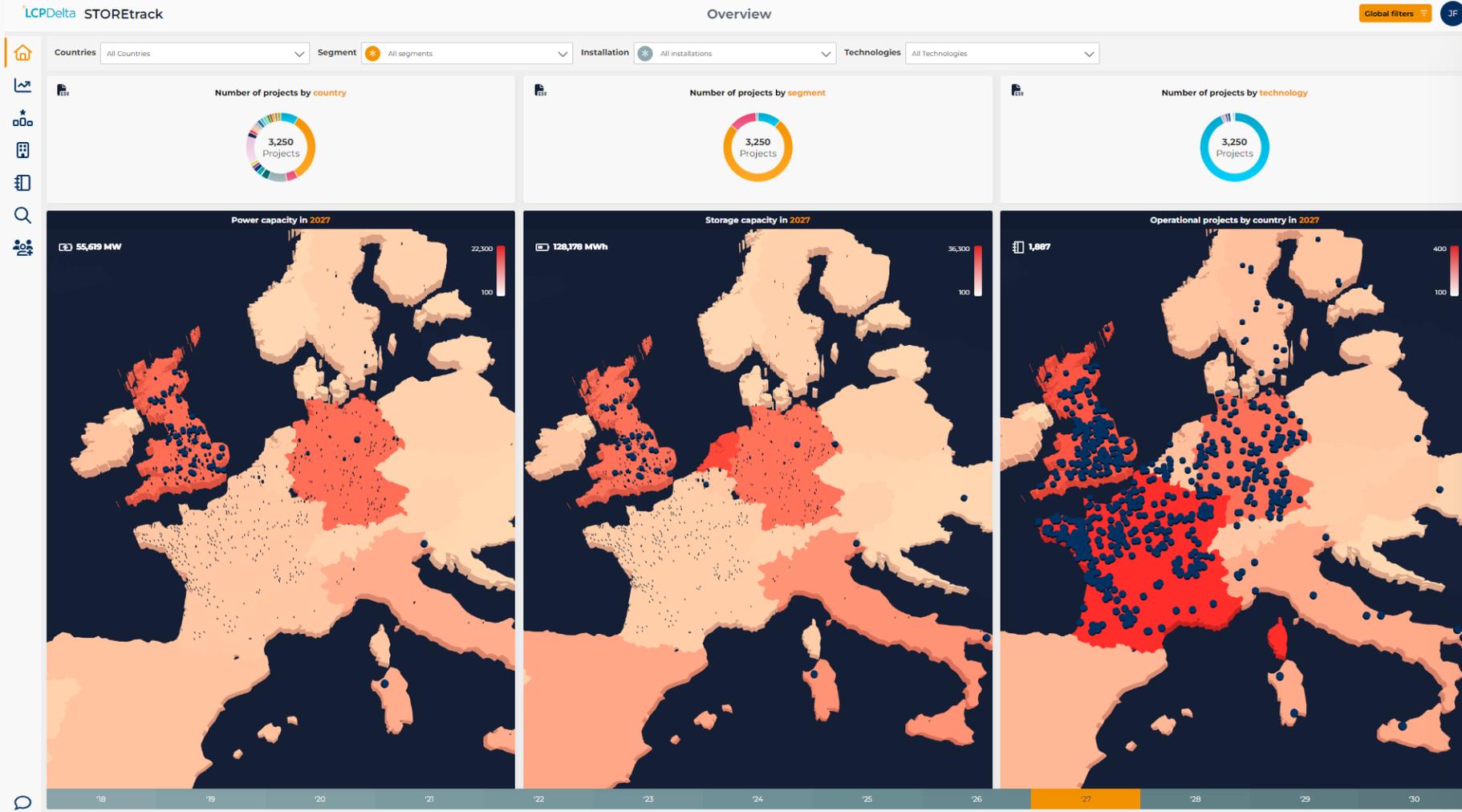
Pipelines and Projects



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Policies

Storage and PV auctions



Storage and PV auctions



Standalone

Co-located

Capacity Market



Capacity Market

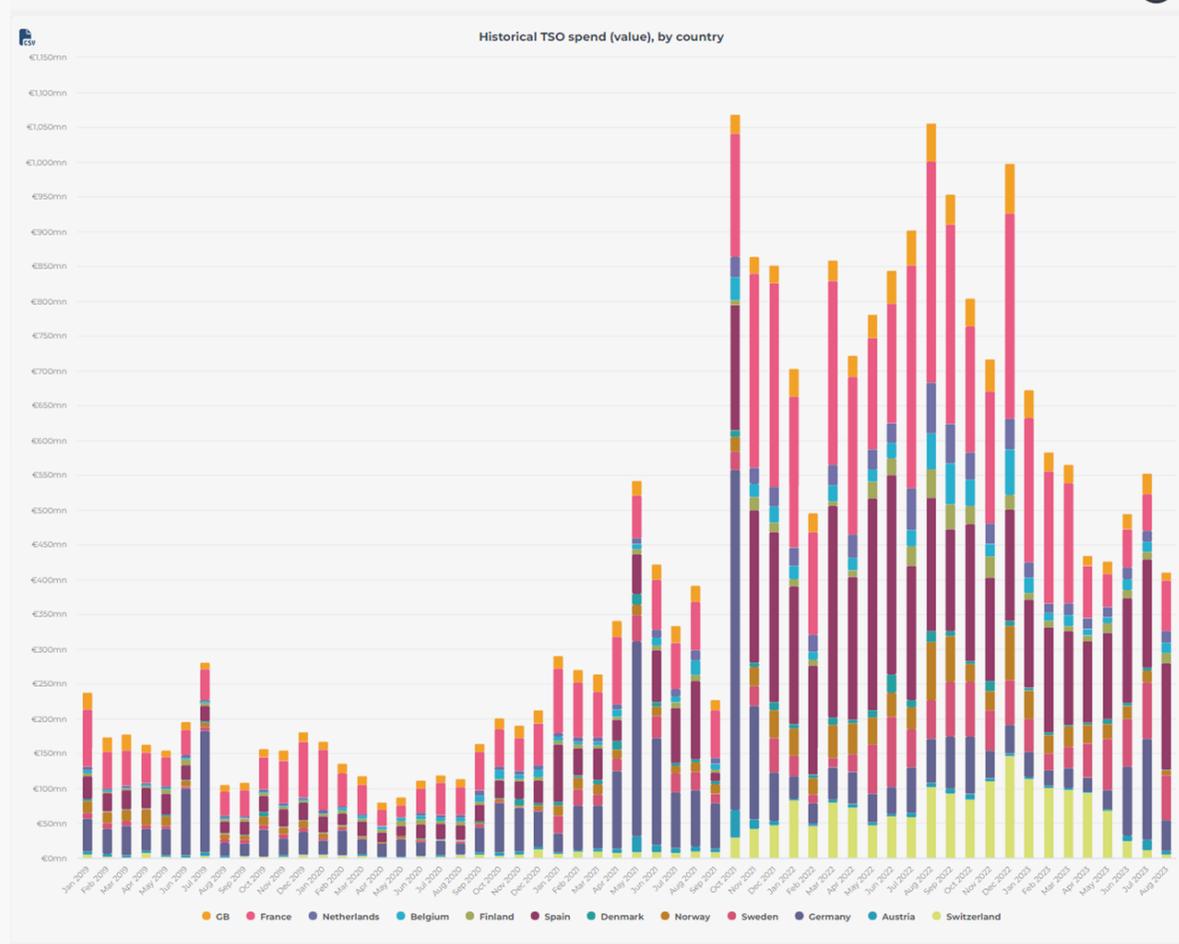
Strategic Reserve

Prices

Potential market opportunity for storage assets

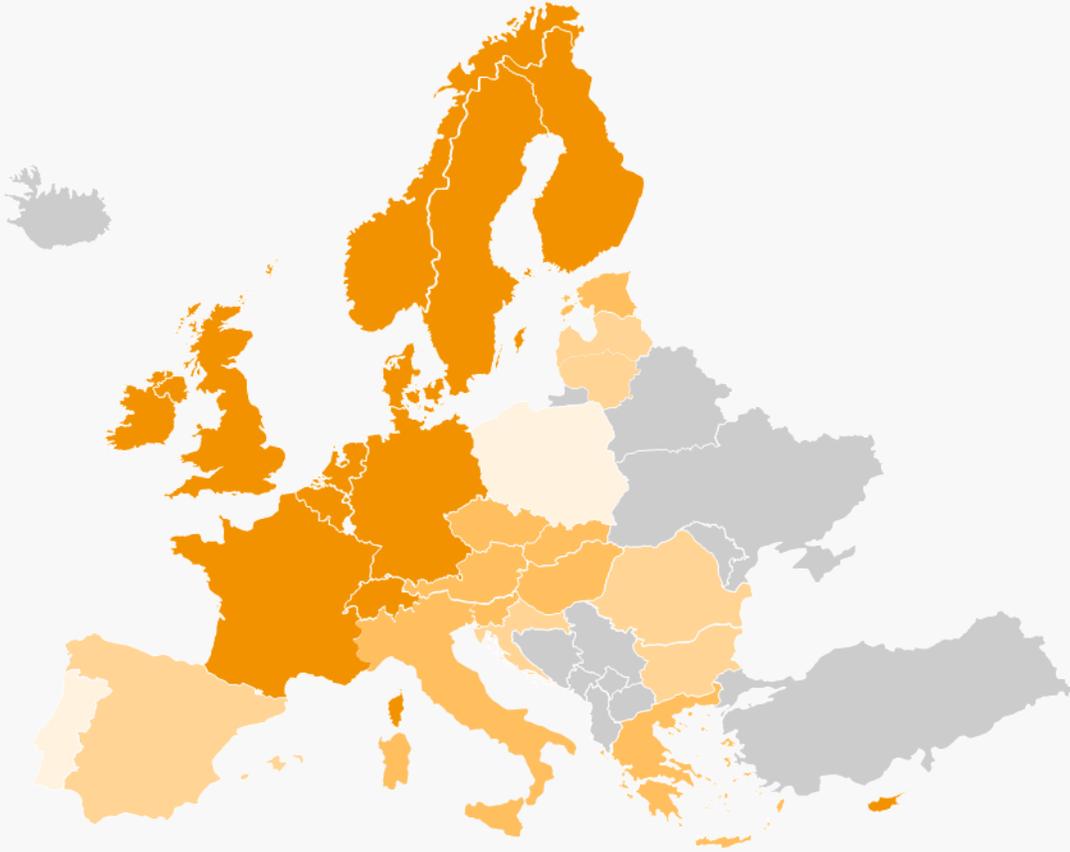
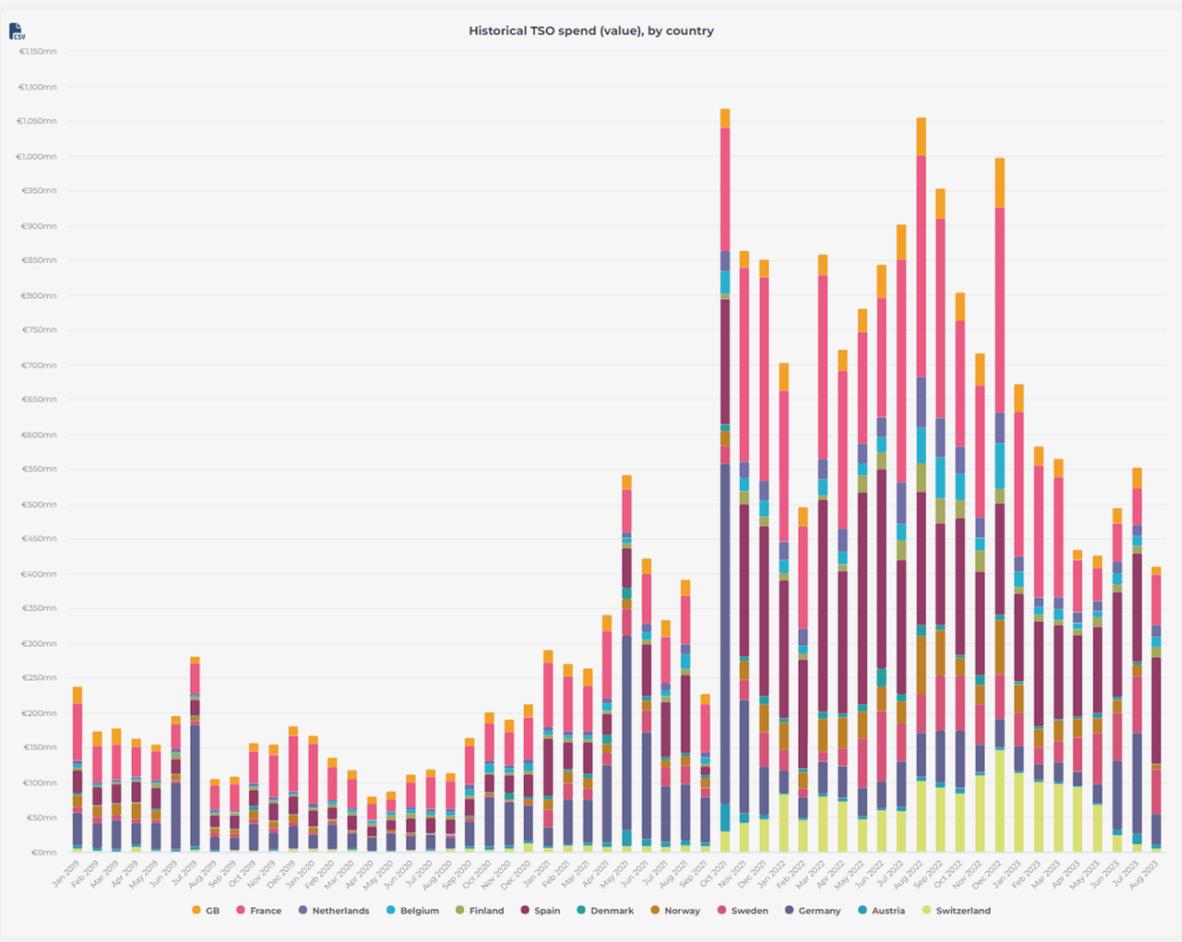
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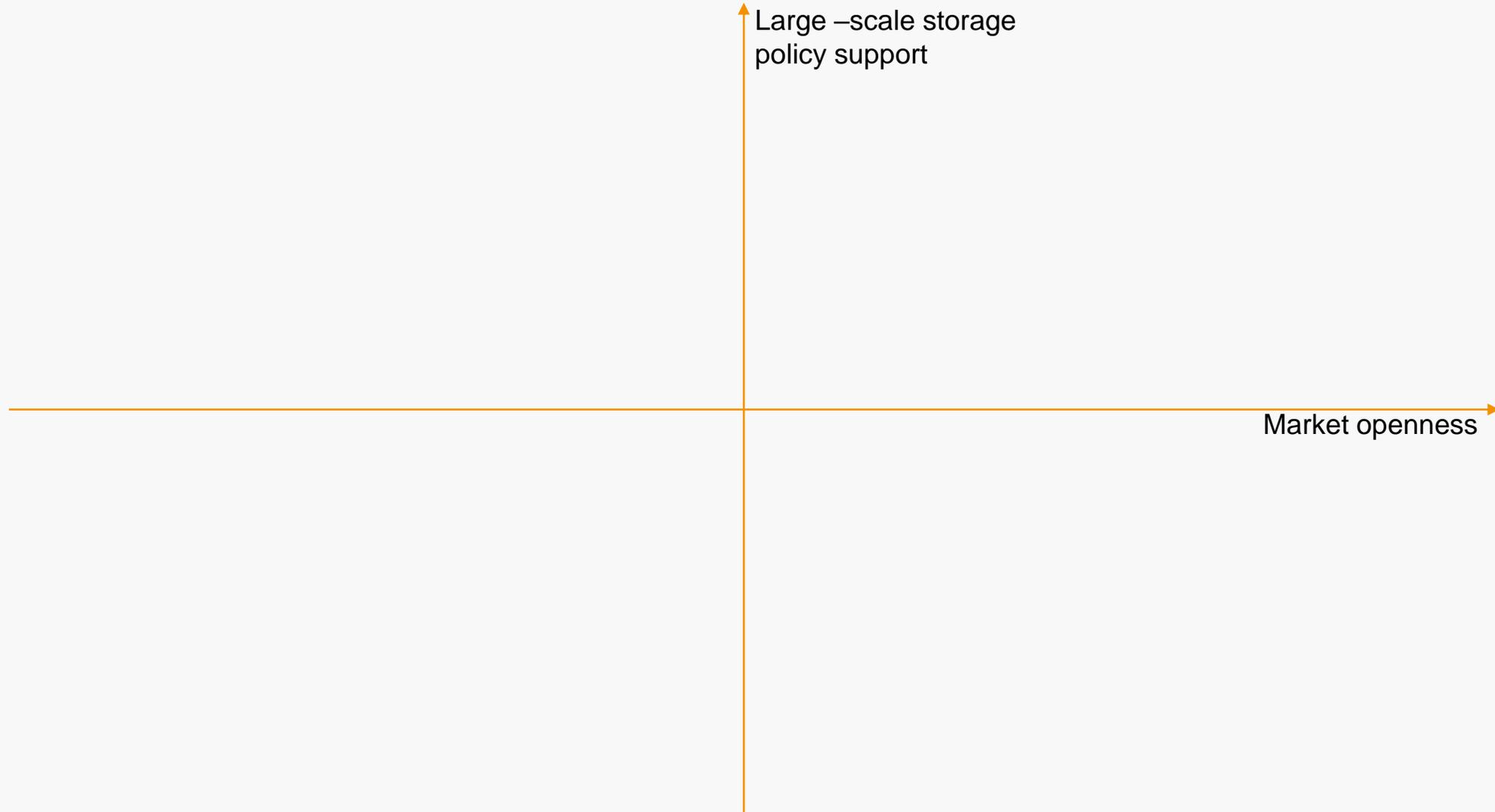


Market accessibility and market openness

LCP Delta/smartEn Flexibility Market Monitor 2023

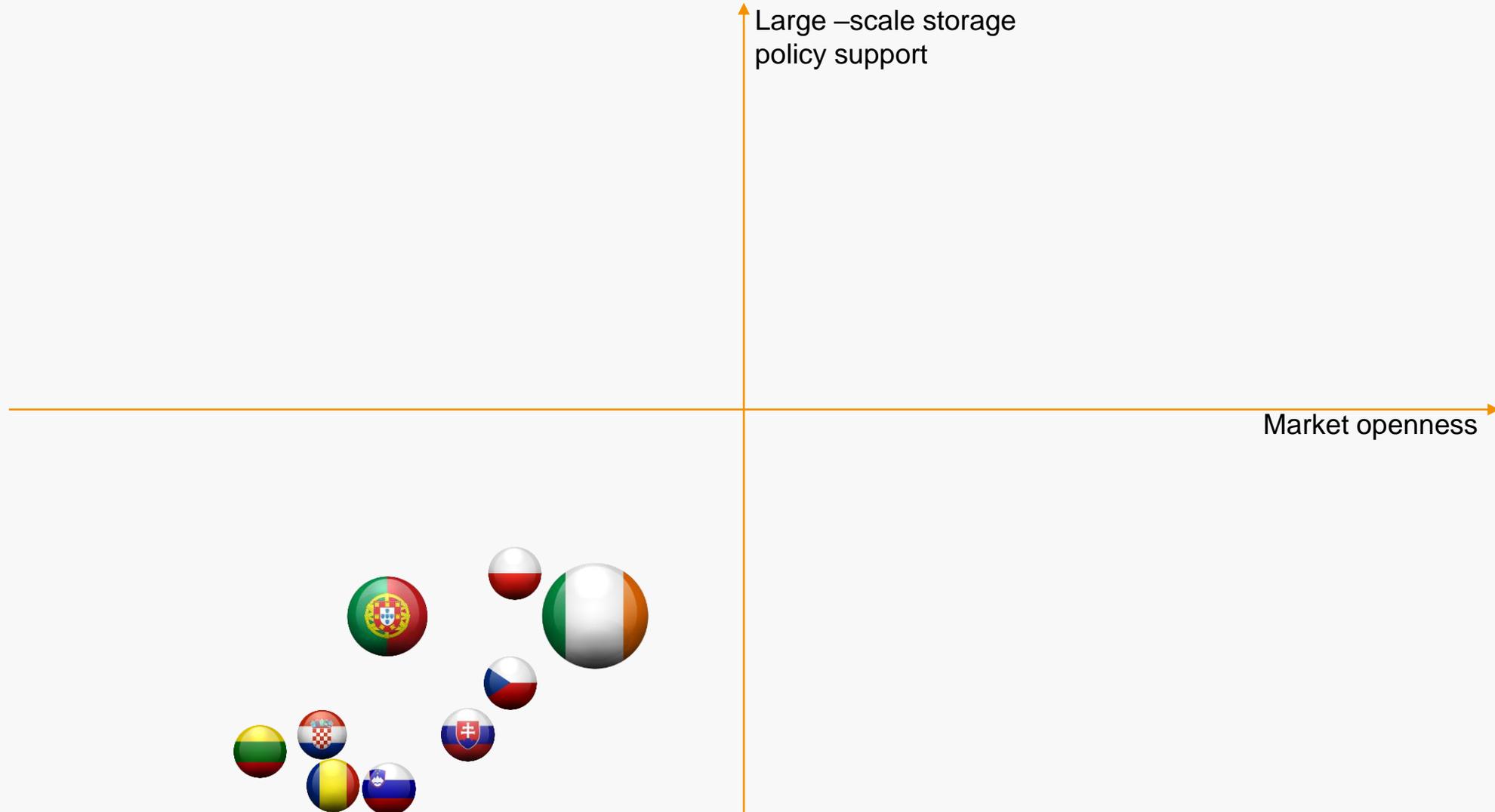
Higher policy support is common in countries

Flag size relates to FoM size in 2025 : some policy support will take more to impact (e.g. Hungary, Poland)



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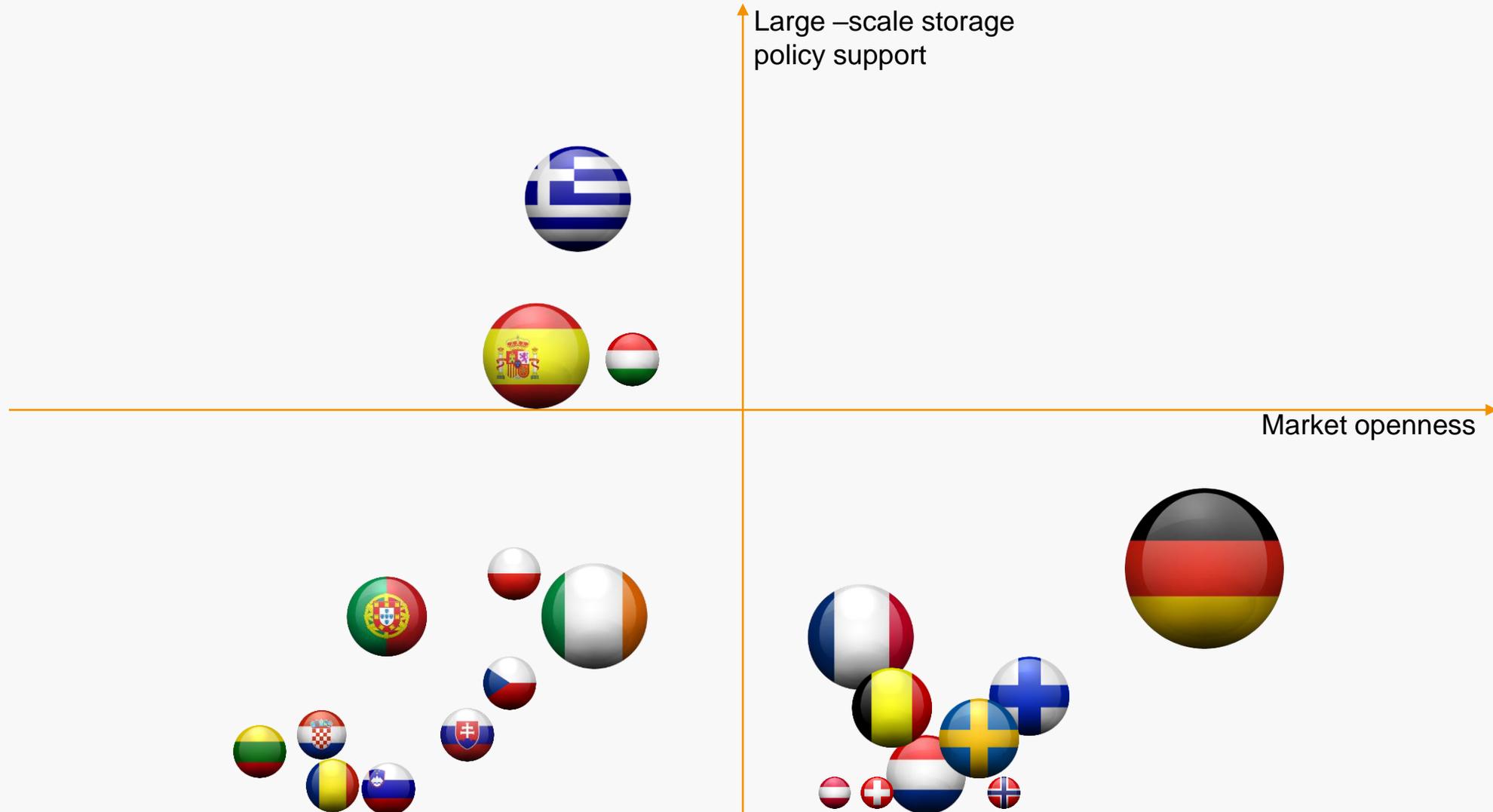
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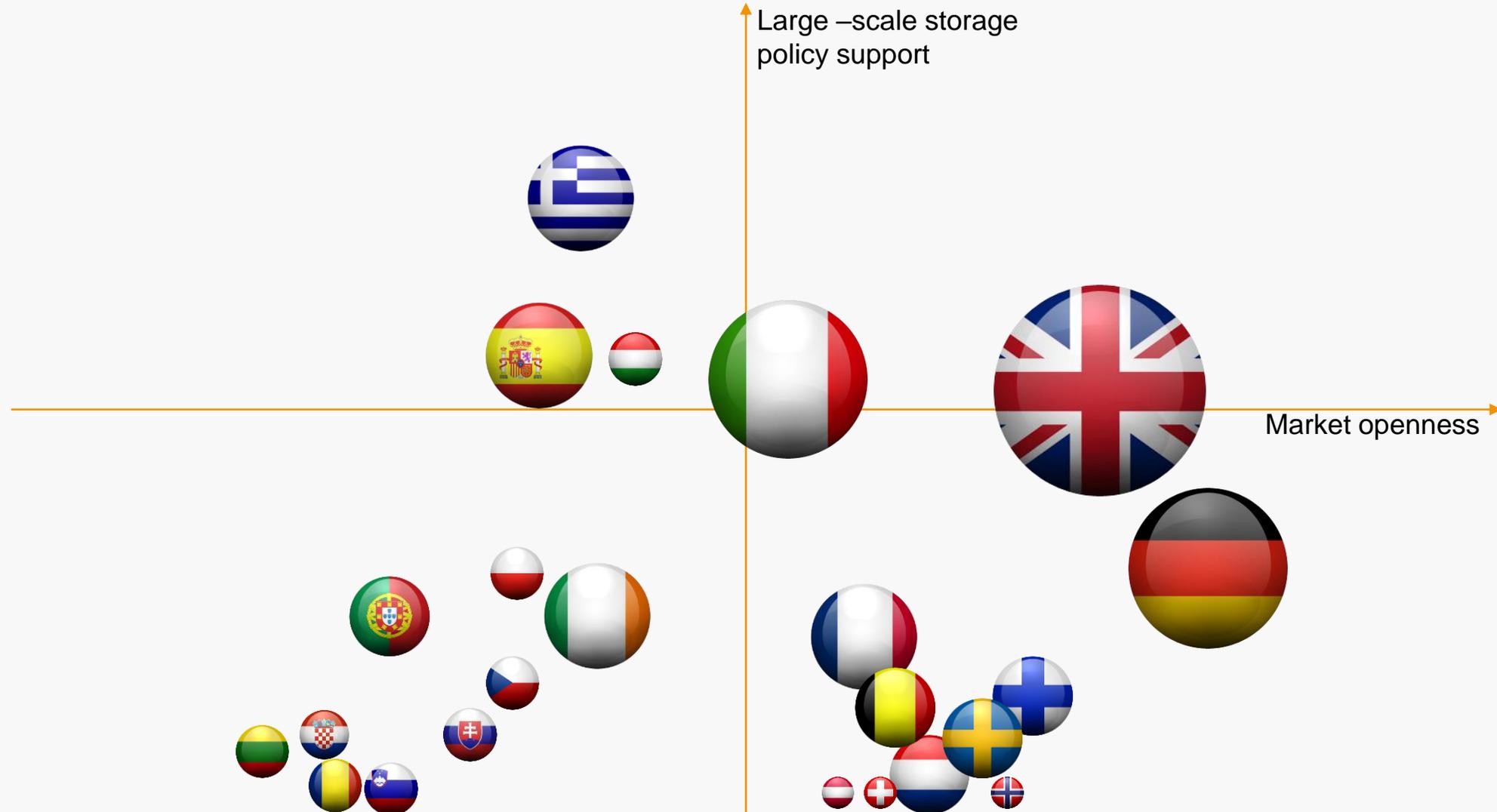
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Partnerships: Traditional Utility

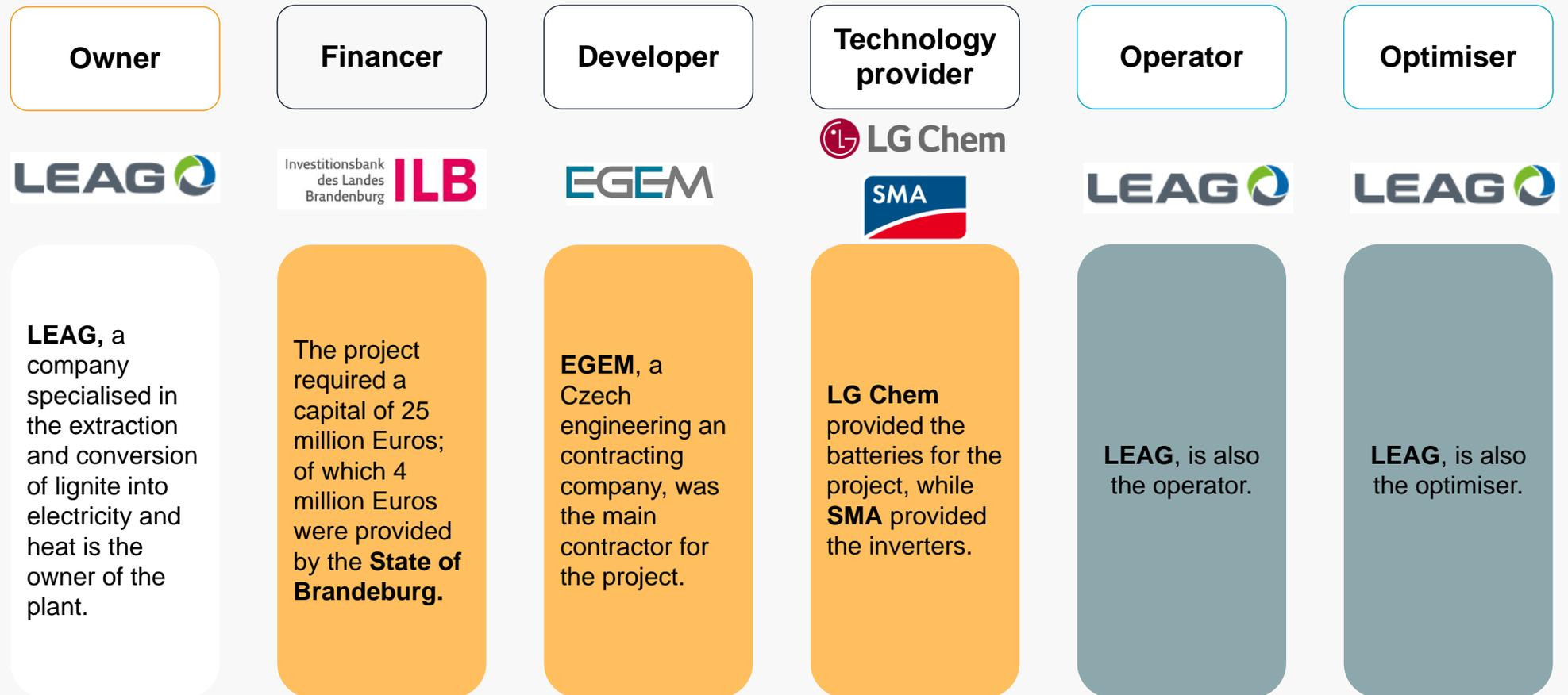
BigBattery Lausitz, Germany

The project, co-located with LEAG's "Schwarze Pumpe" lignite plant in Brandenburg, is operational since 2020

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Partnerships: New Entrants

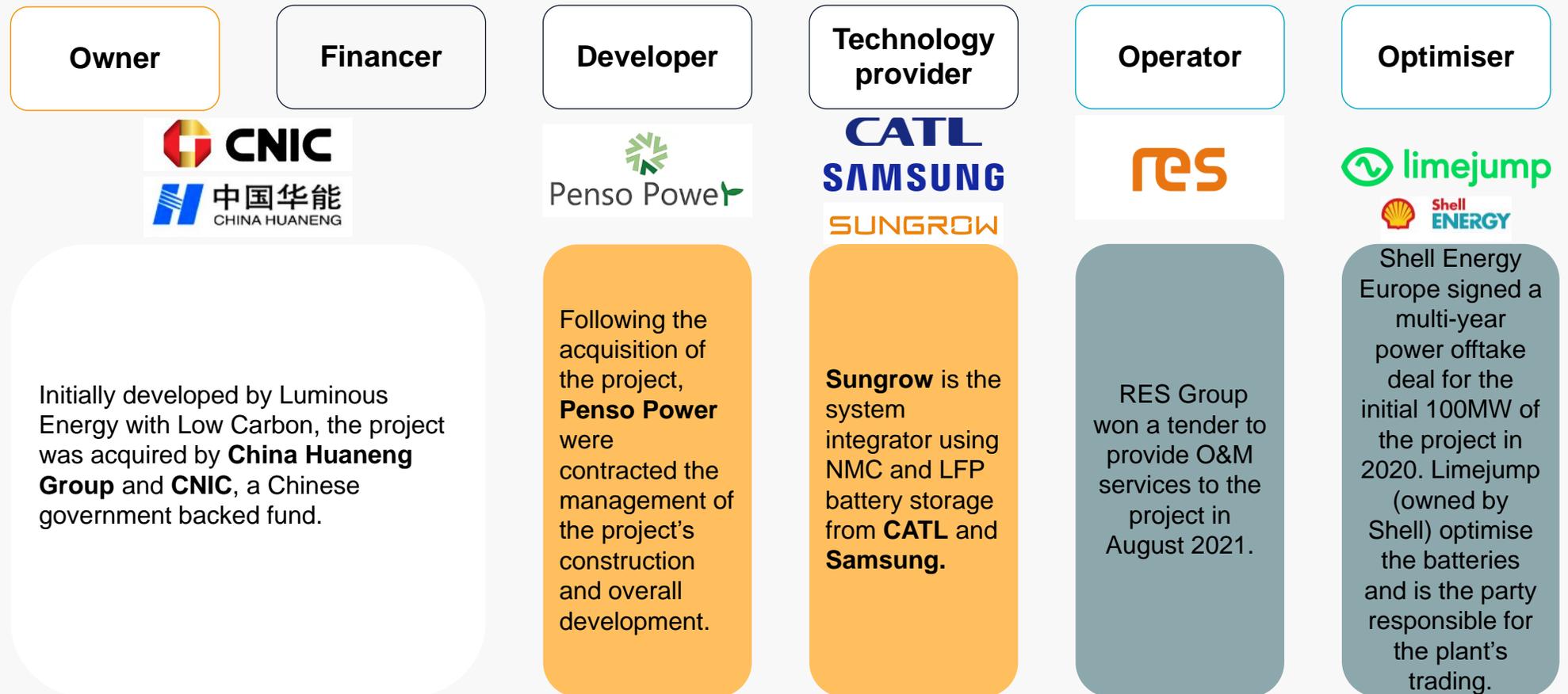
Minety Battery Project, UK

The project actually consists of 2x50MW battery installations in adjacent locations and is fully operational since July 2021

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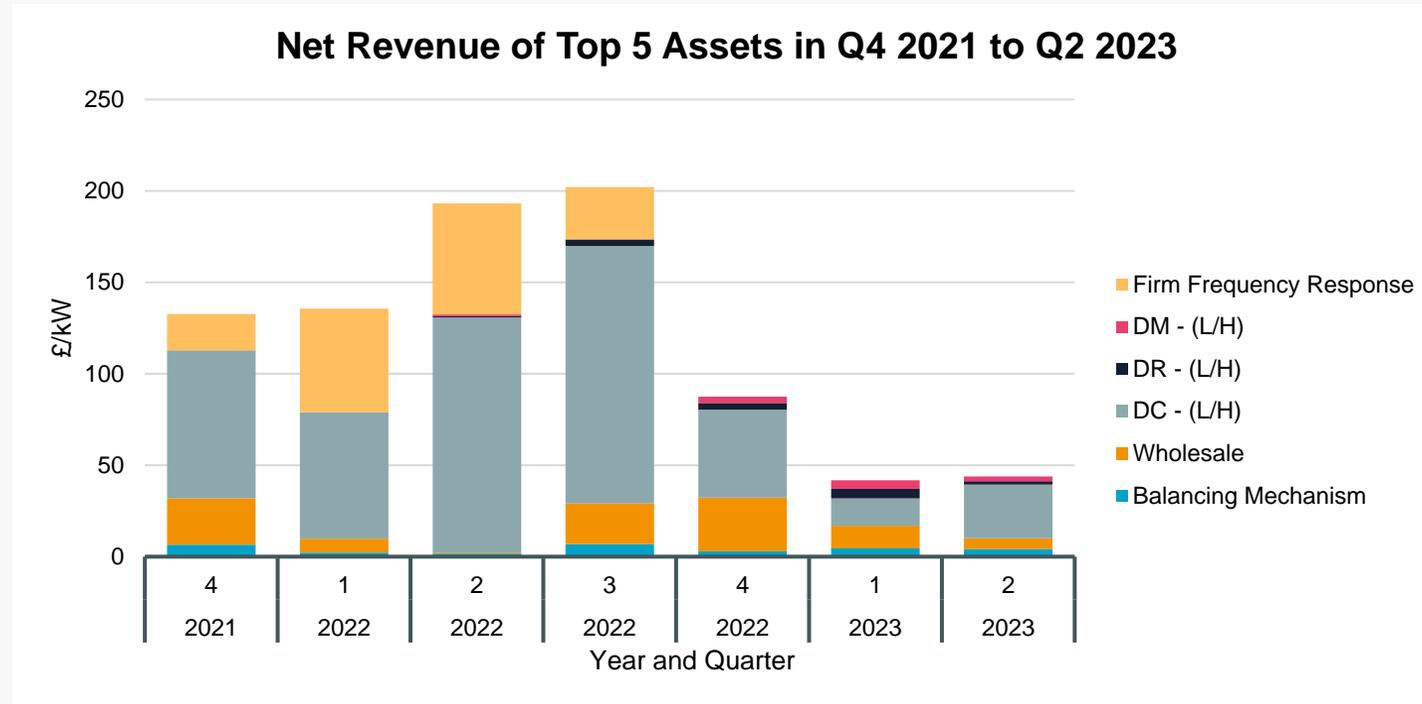


Profit

Net revenue has fallen as strategies become more complex

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Contact us



Jon Ferris

Head of Flexibility and Storage

+44 (0)7939 546647

jon.ferris@lcp.com

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