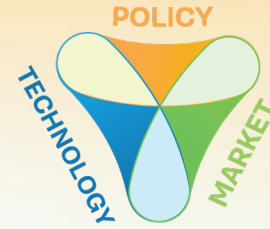


ESGC 2025 Opening

David Post
President of Energy Storage
Europe

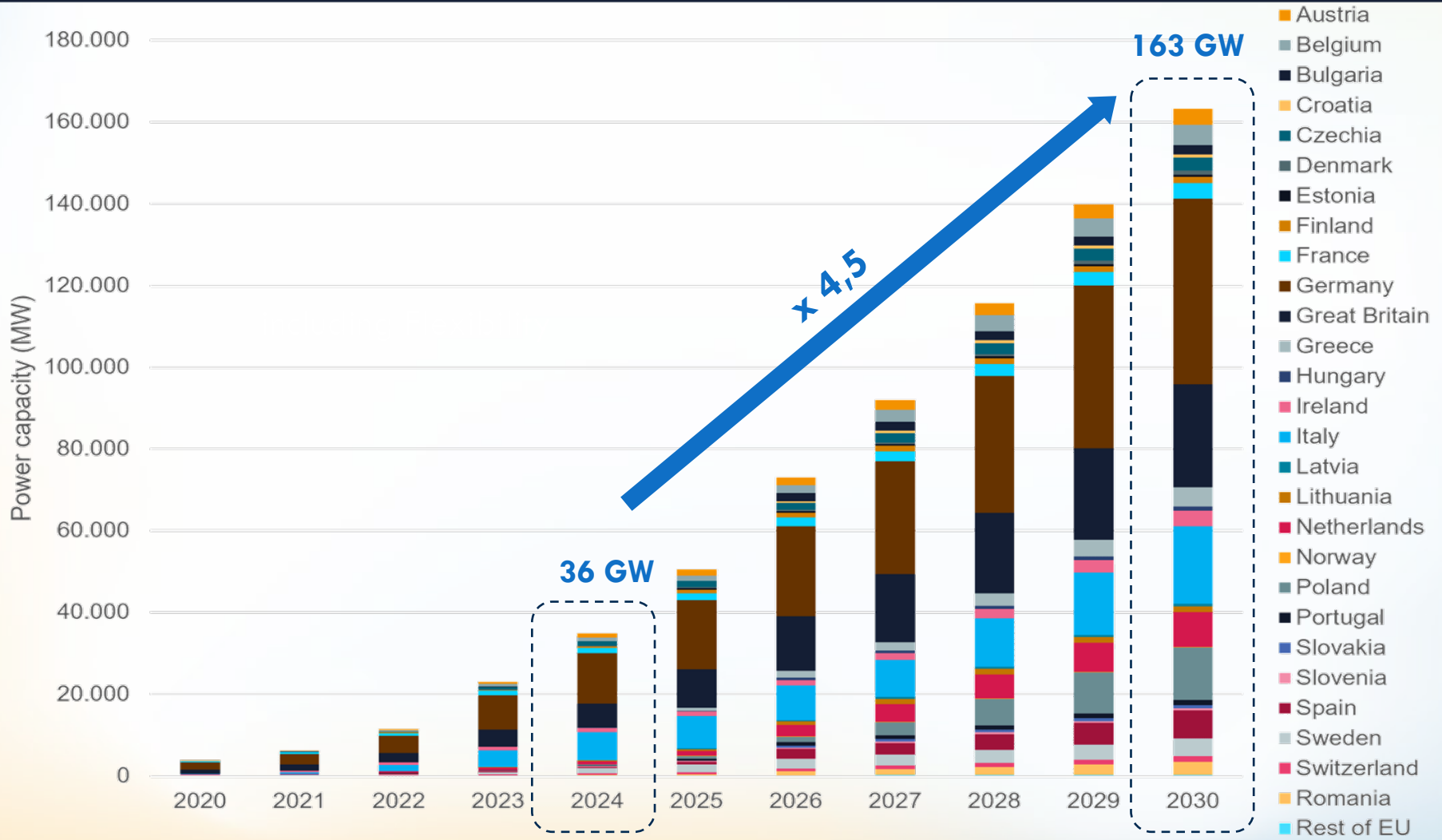


**ENERGY
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Global Conference
Brussels, 14-16 October 2025



Energy storage continues to scale

Cumulative power capacity



Source: EMMES 9.0

Utility-scale FTM surpassing residential solutions, triggering next-step growth

New installations in 2024



FoM storage capacity

4.9
GW

12.1
GWh



BtM storage capacity

7.1
GW

9.8
GWh



FoM storage capacity

+60%
GW

+280%
GWh

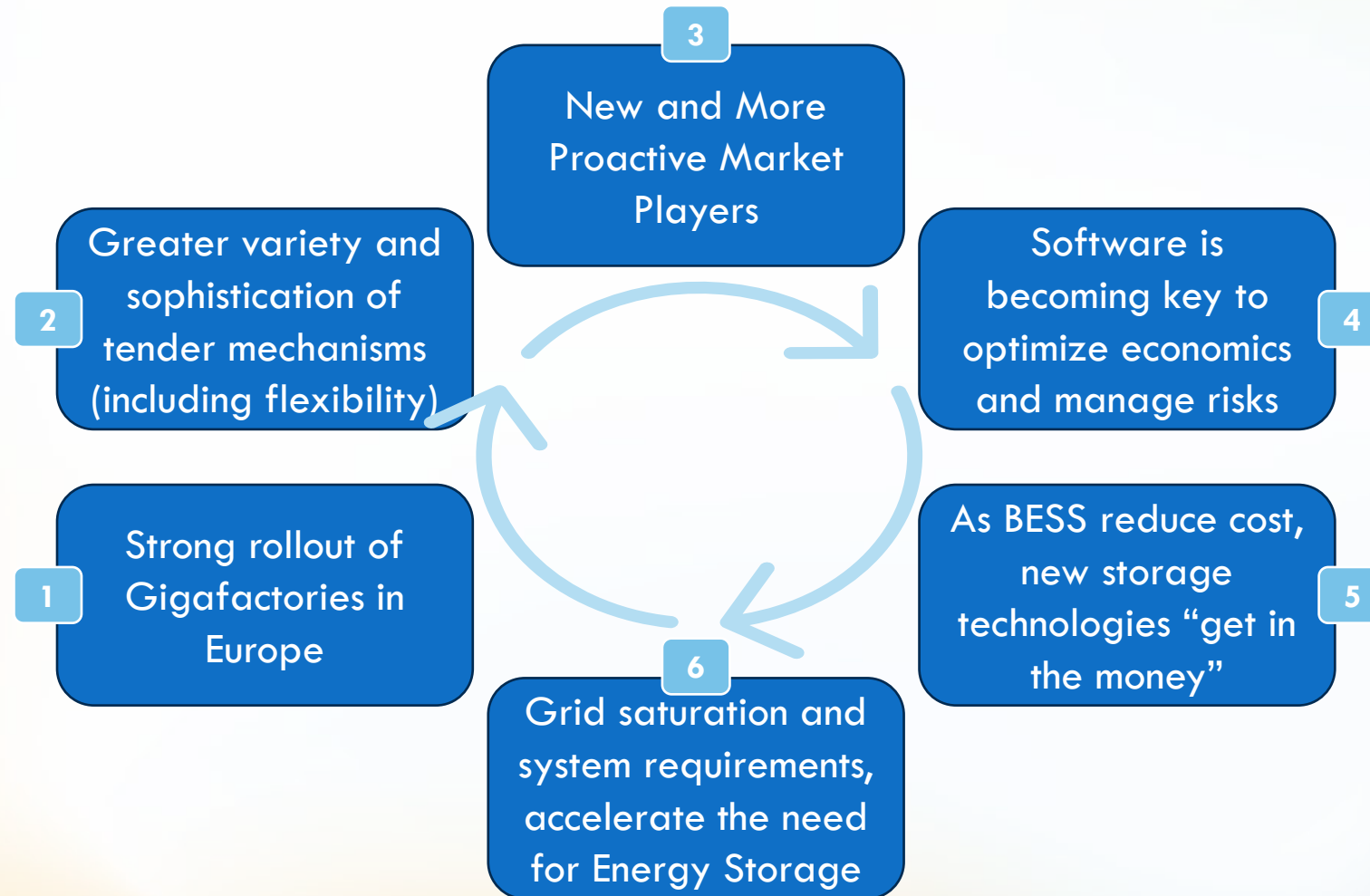


BtM storage capacity

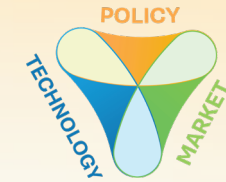
-17%
GW

-17%
GWh

Key trends in the battery storage market



Strong rollout of Gigafactories in Europe



ENERGY STORAGE
Global Conference
Brussels, 14-16 October 2025

December 10, 2024



Stellantis and CATL to Invest Up to €4.1 Billion in Joint Venture for Large-Scale LFP Battery Plant in Spain



Impact launches new automated line to double battery production (up to 1.2 GWh) in 2024



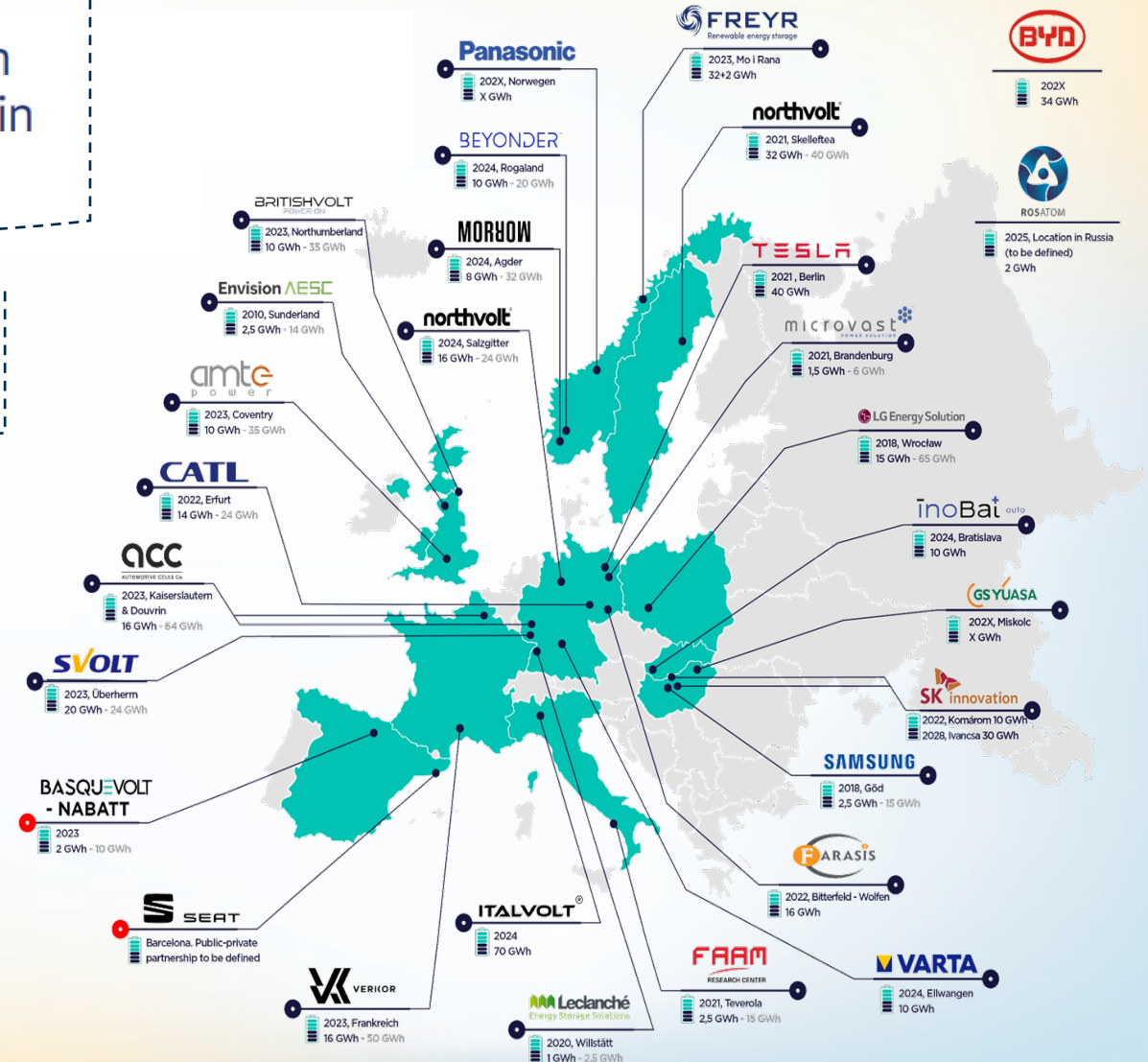
Battery maker Blue Solutions plans 2 billion euro gigafactory in France

By Eric Onstad

May 29, 2024 6:59 AM GMT+2 · Updated May 29, 2024



Japan-owned car battery maker secures £1bn to build second Sunderland gigafactory



Greater variety and sophistication of tender and remuneration mechanisms

U.K



- Capacity market
- 3,4GW
- 15 yr, pay-as-clear

Spain



- Recovery and Resilience Facility (RRF)
- Planning on Capacity market
- Grid-scale storage

Italy



- MACSE auction - 10GWh, 15 yr,
- Tolling agreement, Zelestra-BKW

Germany



- Tolling agreements
- RWE- Terralayr, Yuniz, Nofar Energy

Poland



- Various tenders
- 200-263MW
- Capacity market / government auctions

Bulgaria



- Hybrid PV+BESS PPA (BESS firming up PV production)
TEVA – Energy (122 MW)

Greece



- BESS tender (200MW)
- Sliding FIP + CAPEX support



Flexibility tenders
open new
opportunities for
Energy Storage

New tender structures, tolling agreements, Energy Storage as part of hybrid PPAs to “firm-up” PV production, and new Flex tenders

New entrants and capital flows reshaping the industry

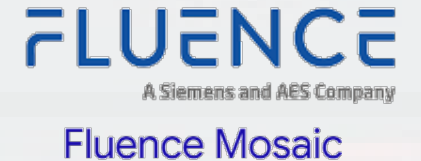
- Increased investors' interest in storage
- Entry of **private equity, infrastructure funds, and family offices** (tolling agreements, capacity payments)
- **Developers** turning into asset operators
- Increasing **M&A** and portfolio aggregation
- Growing pipeline of **merchant-exposed BESS**



More investors entering the market, which means faster growth, more competition, and bigger projects

Software is becoming key to optimize economics and manage risks

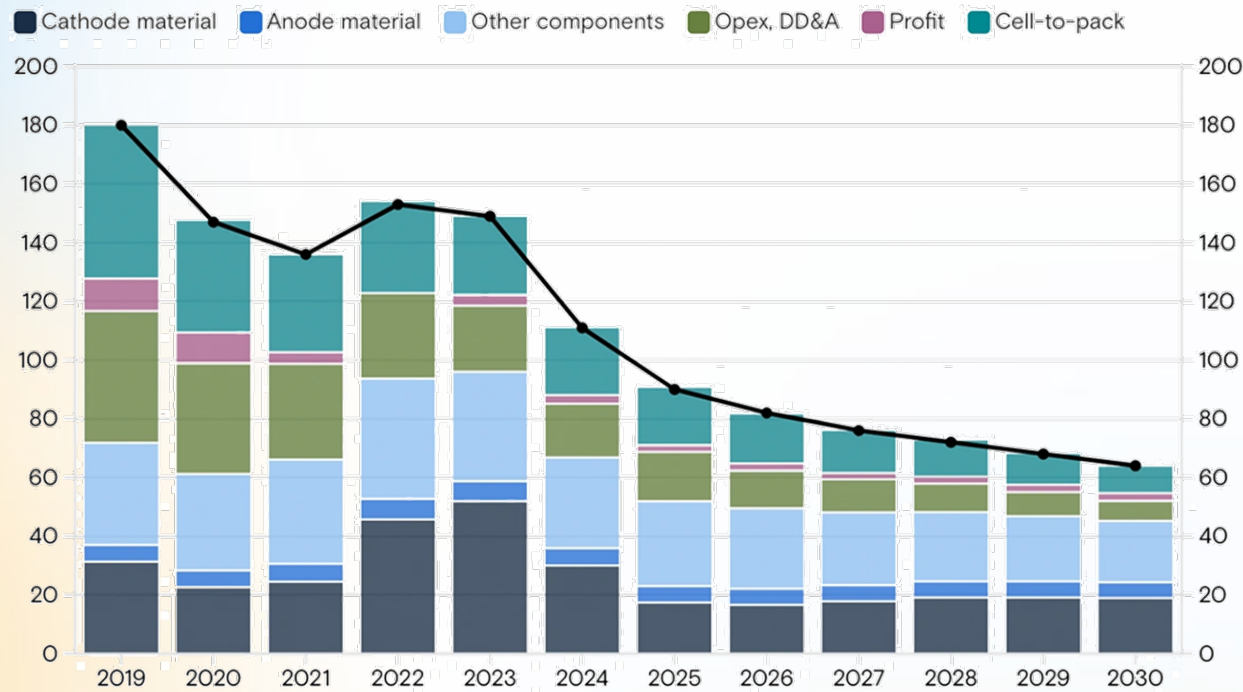
- Shift from tech specs to **optimization algorithms**
- Advanced **Energy Management Systems (EMS)** and **AI-based dispatch** key for revenue stacking (energy arbitrage, ancillary services, capacity mechanisms, etc.)
- Integration with **real-time markets and flexibility platforms**
- +10 - 20% higher returns



As BESS reduce cost, new storage technologies “get in the money”

Battery prices forecast to continue to fall

Global: average battery pack prices (US\$/kWh)



Flow battery storage

Mechanical storage



Thermal storage



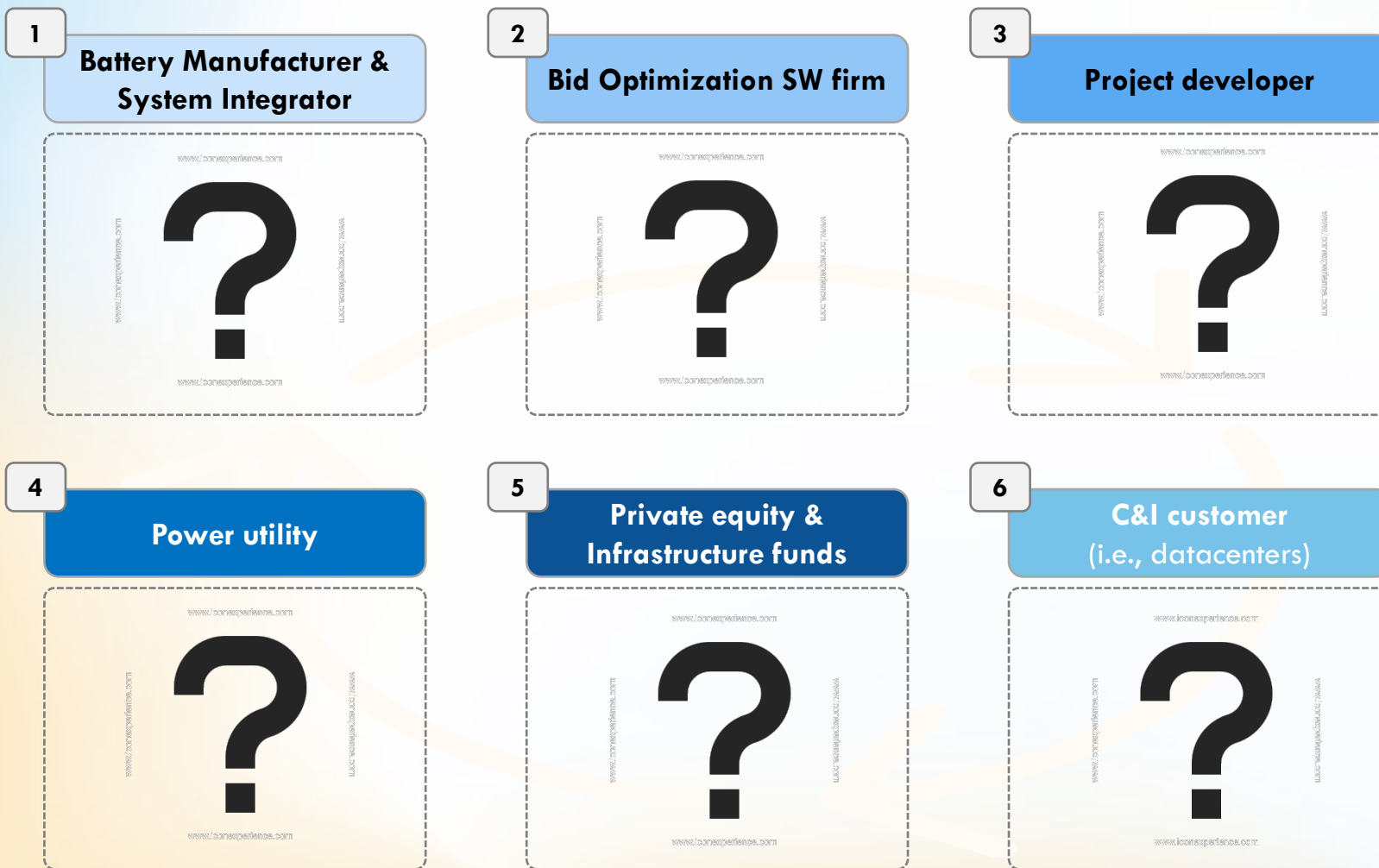
Grid saturation and system requirements, accelerate the need for Energy Storage



- Many grids are **saturated**, making it harder to add more renewables
- **Delays in new transmission lines** increase the need for local storage
- **Data-centers growth plans** face lengthy **time-to-power challenges** (co-located storage could be a solution)
- Batteries help keep the grid **stable and reliable** (black-start, frequency support)
- Governments are pushing storage for energy security and independence
- Batteries are becoming the **backbone of flexible, clean energy systems**

Energy storage is essential for the grid and enables more renewable energy

What is the next step of each player in the value chain?



- Consolidation through M&A?
- Role of developers or financial investors?
- Which regions / countries will take a decisive growth step?
- How can software optimization make the difference?
- Any new regulation reinforcing the deployment of EU energy storage?
- How will bottlenecks (grid access, permitting, supply chain) shape the market in the next year?

Session 1.3 International Trade and Cooperation



**Emily
Burlinghaus**

Director of Energy Storage
Manufacturing & Supply Chain
Solar Energy Industries
Association



**Justin
Rangooni**

President & CEO
Energy Storage Canada



Moderator:

Patrick Clerens

Secretary General, Energy Storage
Europe