



## Update from the Field – June 2021

A monthly analysis note from the energy storage experts

## **Table of contents**

E>	<i>c</i> ecutiv	e summary	2
N	ew reg	ulations and initiatives discussed this month	5
	Amer	icas	5
	Uni	ted States	5
	Europ	e	5
	Ger	many	5
	Australia		6
	Victoria		6
Pı	oject ı	updates and announcements	8
Overview of the 2021 market for utility-scale energy storage projects			8
	Projec	cts announced or contracted this month	8
	Eur	ope	9
Europe  Projects commissioned this month  Europe		10	
		10	
Americas		10	
	Tenders this month		11
	Asia	a	11
Fc	ocus of	the month:	13
	1. F	Polish electricity context	13
	a.	The Polish electricity mix	13
	b.	Future changes in the mix / renewables objectives	13
	C.	Energy storage in Poland (regulations)	16
	d.	BESS projects announced, in construction and commissioned	17
	2. F	Revenue streams available in Poland for energy storage systems	18
	a.	Trading on day ahead and balancing mechanism	18
	b.	Ancillary services	20
	c.	Capacity market	20
	d.	Renewable energy auctions	23



## Update from the Field – June 2021

A monthly analysis note from the energy storage experts

## Table of figures

Figure 1: German innovation tender requires 0.33MW / 0.66 MWh of storage to be colocated with renewables6			
Figure 2: Scheduled volume for future innovation tenders6			
Figure 3: Utility-scale energy storage projects announced/contracted and commissioned in 2020 and 2021 (ongoing)8			
Figure 4: Electricity generation mix in Poland for 2020, 2030 and 2040 (Source: Impact assessment of policies and measures - Annex 2 to the National Energy and Climate Plan for 2021-2030)			
Figure 5: Capacity forecast of technologies for years 2020-2040 ( from Impact assessment of policies and measures - Annex 2 to the National Energy and Climate Plan for 2021-2030) . 14			
Figure 6: Major actors of the electricity supply chain15			
Figure 7: Average daily price spread on the day-ahead and balancing market			
Figure 8: Graph presenting the total volume of capacity contracts concluded for the auctions as well as the clearing price (https://www.pse.pl/aukcja-glowna-na-rok-dostaw-2025) 22			
Table of tables			
Table 1: Group strategies for 203016			
Table 2: List of storage projects in CHESS developed in Poland17			
Table 3:Table of revenues for an energy storage system in Poland			
Table 4: Government's expectations in terms of RES deployment resulting from the 2021 auction (Source: https://www.dentons.com/en/insights/alerts/2021/january/11/budget-for-res-auctions-in-2021)24			