



CLEAN**HORIZON**

The Energy Storage Experts



Update from the Field – February 2019

A monthly analysis note from the energy storage experts

Table of contents

| | |
|--|-----------|
| Executive summary | 2 |
| New regulations and initiatives discussed this month | 5 |
| Americas | 5 |
| United States | 5 |
| Europe | 6 |
| United Kingdom | 6 |
| Spain | 6 |
| Project updates and announcements | 7 |
| Overview of the 2019 market for utility-scale energy storage projects | 7 |
| Projects announced or contracted this month | 8 |
| Asia | 8 |
| Europe | 8 |
| Americas | 9 |
| Australia & Oceania | 9 |
| Projects commissioned this month | 9 |
| Europe | 9 |
| Australia & Oceania | 10 |
| Asia | 10 |
| Tenders this month | 11 |
| Asia | 11 |
| Africa | 11 |
| Focus of the month: Country forecast for energy storage in 2019 | 12 |
| Big players: major countries to watch for storage in 2019 | 12 |
| South Africa: the new World Bank testbed for large-scale battery storage | 12 |
| France: the best short-term opportunities for utility-scale storage in Western Europe | 14 |
| South Korea: energy storage adoption motivated by incentive programs and national schemes | 17 |
| United States: New York and Massachusetts are stealing the spotlight | 20 |
| Small players: some opportunities but nothing transcendental | 26 |
| Puerto Rico: the shift from a heavily indebted monopoly to a cooperative prosumer model | 26 |
| The Middle East: a hotbed for large-scale energy projects without clear energetic roadmaps | 27 |



Update from the Field – February 2019

A monthly analysis note from the energy storage experts

Table of figures

| | |
|---|----|
| Figure 1: Utility-scale energy storage projects announced/contracted and commissioned in 2018 and 2019 (ongoing)..... | 7 |
| Figure 2: Slides presented in October 2018 by Eskom in South Africa | 13 |
| Figure 3: Provinces in which batteries will be deployed for phase and corresponding capacity .. | 14 |
| Figure 4. Installed energy storage capacity (MW) in France..... | 17 |
| Figure 5: REC weight-based revenue principle for solar and Wind plus ESS..... | 18 |
| Figure 6: Renewables and storage targets in South Korea- | 19 |
| Figure 7. USA Investment Tax Credit Incentive scheme (2017 - 2022) | 20 |
| Figure 8. New York incentives for energy storage | 22 |
| Figure 9. Massachusetts incentives for energy storage..... | 25 |