

Capability Statement



About LCP Delta

Expertise in generation, networks and demand in a single integrated energy transition practice

Our mission is to enable a better, faster energy transition for all by supporting the energy sector to drive the transition.

Founded in 2004 and based across the UK, France, Norway, the Netherlands and beyond, LCP Delta provide data-driven research, consultancy, technology products and training services to companies investing in and navigating the energy transition.

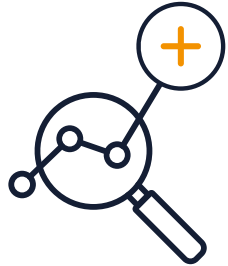
We are a diverse team from a variety of backgrounds including engineers, data analysts, environmentalists and more.

LCP Delta is a mission driven organisation - all of us want to make a difference to the energy transition and accelerate the path to a low carbon future.

The energy market is becoming increasingly complex. As consumers become more empowered and as energy systems around the world decarbonise, there is a need to understand both the generation and demand side to effectively navigate the rapid changes occurring.

LCP Delta was formed through the merger of Delta-EE and LCP Energy to bring together deep generation and consumer-side expertise, to provide our clients with a single partner to help them on their journey and provide them with a 360° view across the energy spectrum.

LCP Delta provides the best advice, support and tools to enable the energy sector to drive the energy transition



Subscription research services

Our portfolio of subscription research services offer in-depth insights across the energy transition landscape. We have been undertaking primary research with organisations active in the energy transition since 2004 – we have an unparalleled international network of contacts we can draw on. Each service focuses on a particular aspect of the energy transition.

Market and strategic advisory consulting

We provide support across the full energy value chain with bespoke research, insight, forecasts and advice tailored to them. Our consultancy offerings draws on expertise and data from across LCP Delta, from strategic market entry analysis through to detailed half-hourly revenue forecasting.



We support our clients in four ways



Technology & data

Data integration and analysis is at the heart of the energy transition. However, sourcing and navigating complex, wide-ranging datasets is challenging. At LCP Delta, we combine and curate proprietary and public datasets to provide you with a single source of truth across the energy spectrum, and make this data interactive using our cutting-edge technology.

Training

Our training helps professionals quickly develop their new energy knowledge, accelerating their impact for organisations who want to capture opportunities. We provide meaningful, concise and easy to understand short courses.



Subscription Research Services

Use a combination of our subscription research services, bespoke consultancy projects and training services to gather the information you need to ensure your business's success in the energy transition.

Electrification of Heat Service

Identify and capture the increasing range of opportunities from growing electrification of heat



Energy Storage Research Service

Capturing the best opportunities for distributed energy storage



Flexibility Research Service

Capturing opportunities in the growing demand side flexibility market



Gas Heating Service

What is the future of gas in buildings and how can you best capture the opportunities and respond to the threats?



Global Hydrogen Intelligence Service

How the global hydrogen sector is developing



Heating Business Service

How to evolve from selling individual products and commodities to become a successful home energy solution provider



Connected Home Service

The opportunities in the growing connected home market and how to capture them



Energy Insights +

How can we best use energy insights to enhance residential customer engagement and create value for us and our customers?



Home Energy Management Service

What's happening in the HEM space and what opportunities are there for all the companies potentially involved?



EV Charging Service

How to best develop position and activities to succeed in the rapidly growing eMobility market



New Energy Business Model Service

Understand, identify and implement the most promising commercial opportunities from the increasing disruption in the energy sector



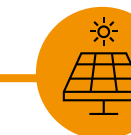
Distributed Power Service

How to succeed in the global distributed power market



Solar PV

Understanding the growth of solar PV across Europe



Choose the research you need for your new energy success

About LCP Delta's Consulting Services

Deep expertise, knowledge and world-class modelling capabilities across the energy value chain



150+

Global clients



6

Global offices



80+

Colleagues

Our areas of expertise

Demand

Understanding customers, market dynamics, technology & services deployment, and impacts of policy & regulatory changes on the demand side.

Energy networks

Assessing the impact on energy networks of regulatory changes, demand & supply evolutions and deployment of flexibility.

Generation

Revenue forecasting and system optimisation of generation assets as well as policy implications on generation mix and system costs.

How we help our clients



Market sizing, forecasting deployment of new energy technologies & services.



Modelling, revenue optimisation and forecasting, system costs analysis



Competitive landscape, analysis of key players, technologies



Customer research and insights, client archetypes, policy impact analysis and business models



Strategic advice, due diligence, scenario development, thought leadership

Technology and data

Providing the data, visualisation and analytics to inform decision making

Europe

Enact features data from over **30 countries** and over **100 interconnectors**.

- ✓ Use maps and charts to view the continent
- ✓ Compare countries and regions
- ✓ View European power markets
- ✓ Set up custom notifications

| Country | Min/Max Price (€/MWh) | Average Price (€/MWh) |
|---------------------|-----------------------|-----------------------|
| GB | 25.3 - 491.76 | 616.21 |
| Austria (AT) | 23.75 - 616.21 | 616.21 |
| Belgium (BE) | 22.62 - 575.6 | 575.6 |
| Bulgaria (BG) | 208.53 - 631 | 631 |
| Croatia (HR) | 227.28 - 633.45 | 633.45 |
| Czech Republic (CZ) | 226.87 - 600.83 | 600.83 |
| Estonia (EE) | 147.97 - 545.9 | 545.9 |
| Finland (FI) | 147.97 - 545.9 | 545.9 |
| Greece (GR) | 229.82 - 627 | 627 |
| Hungary (HU) | 226.79 - 645.04 | 645.04 |
| Latvia (LV) | 147.97 - 545.9 | 545.9 |
| Lithuania (LT) | 147.97 - 592.97 | 592.97 |
| Netherlands (NL) | 162.86 - 589 | 589 |
| Poland (PL) | 123.18 - 482.2 | 482.2 |
| Portugal (PT) | 123.18 - 277 | 277 |
| Romania (RO) | 205.53 - 643.14 | 643.14 |
| Serbia (RS) | 248.55 - 555.05 | 555.05 |
| Slovakia (SK) | 220.43 - 648.45 | 648.45 |
| Slovenia (SI) | 216.08 - 621 | 621 |
| Spain (ES) | 123.18 - 277 | 277 |
| Switzerland (CH) | 396 - 591.72 | 591.72 |

Project Details

| Project Site Name | Operation Start Date | Country | Total Electrolyser Power (MW) | Demand Capacity (Tonnes / Yr) | Investment Size (€m) | Application Sector | Company | Electrolyser Type | Production Location | Electrolysis Electricity Type |
|---|----------------------|---------|-------------------------------|-------------------------------|----------------------|----------------------|----------------|-------------------|------------------------|----------------------------------|
| Hydrogen Refuelling Station HafenCity Hamburg | 2012 | Germany | 400 | 136.9 | 12.7 | Transport | Cummins | AEL | H2 refuelling station | Renewable electricity |
| Audi Werlte e-gas plant | 2013 | Germany | 6,000 | 377.9 | - | Industrial | McPhy | AEL | Single industrial site | Renewable electricity |
| H2 Herten | 2013 | Germany | 140 | 18.9 | 3.5 | Multiple - Power | Cummins | AEL | Single industrial site | Renewable electricity |
| H2 Herten | 2013 | Germany | 140 | 18.9 | 3.5 | Multiple Sectors | Cummins | AEL | Single industrial site | Renewable electricity |
| H2 Herten | 2013 | Germany | 140 | 18.9 | 3.5 | Multiple - Transport | Cummins | AEL | Single industrial site | Renewable electricity |
| EnergiePark Mainz | 2015 | Germany | 3,750 | 200.0 | 20.1 | Multiple Sectors | Siemens Energy | PEM | Renewable energy park | Grid |
| RWE Power to Gas plant (Bibbichen) | 2015 | Germany | 150 | 9.5 | - | Multiple - Power | ITM Power | PEM | - | Grid |
| Windgas Grapenow/Projekt BHZ-WKA | 2015 | Germany | 1,000 | 66.1 | - | Power | Cummins | AEL | Single industrial site | Dedicated renewables - curtailed |
| Power Gap Filler | 2015 | Germany | 200 | 12.6 | - | Multiple Sectors | H-TEC Systems | PEM | Single industrial site | Dedicated renewables - curtailed |

Current Electrolyser Market Status

This section of the dashboard explores the current operational electrolyser capacity and green hydrogen demand based on the new wave of clean hydrogen projects which started operations between 2011 and Jun 2021.

Active Graph: Operational Electrolyser Capacity by Country

Sum of Total Installed Electrolyser Power (MW): 42,755

Active Graph: Green Hydrogen Demand by Application Sector (Tonnes / year)

Active graph: Operational Electrolyser Capacity by OEM

78.9 MW TOTAL

Enact is used by energy traders to maximise value in the intraday wholesale market, and by market analysts to track trends across Europe.

Visit <https://portal.lcpdelta.com>

FLEXtrack and **STOREtrack** provide access and visualisation of the latest data on key flexibility markets in the energy transition.

Visit <https://portal.lcpdelta.com>

LCP Delta Training

Onboarding and knowledge development for people who want to make an impact in the energy transition

Energy Transition Foundation Course

Onboarding to the energy transition: jargon busting; new energy supply chains; technologies; drivers and barriers; and how the energy transition could evolve

Flexibility: Foundation to Practitioner

Demystify key terms, the role of flexibility in the power system in Europe, the different types of flexibility available or traded; market trends and business models, values and accessibility of flexibility services, and the future outlook for this market.

Bespoke training courses

We also provide private training programmes on request. These have content and structure tailored for the needs of one organisation or team. Delivered by experts with in-session Q&A and reference materials provided.



Hydrogen in the energy transition

Demystify the European production to consumption value chain; the key applications, with case studies; national policy and key initiatives; the future outlook of hydrogen in the wider energy transition.

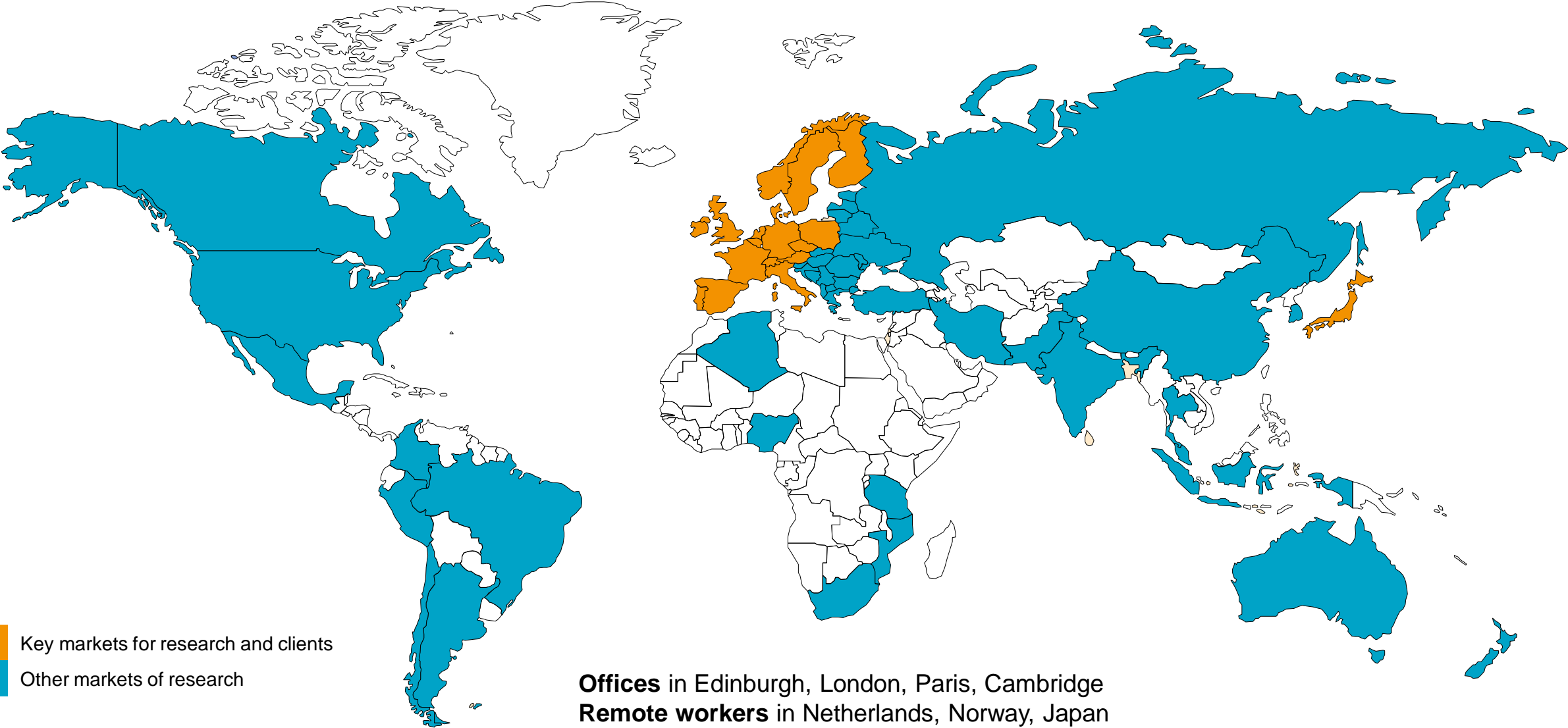
Understanding the decarbonisation of heat



Policy drivers across key European countries; the value chain; key technologies in heating; uptake rates, drivers and barriers; new services and business models; and the outlook for the market

The EV Charging ecosystem: fundamentals, markets and customers

The basics of EVs; charging business models; assessment of the European outlook for the charging market; the ecosystem of players, with case studies; and understanding the EV customer

LCP Delta international presence and research



 Key markets for research and clients
 Other markets of research

Offices in Edinburgh, London, Paris, Cambridge
Remote workers in Netherlands, Norway, Japan

Contact

We are always available to speak to via our website, email or phone. If you would like to know more about how you can become front-runners in the energy transition, contact us and we'll put you in touch with the relevant team.

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