

New Multi-Client Study – publication in June 2013:

The European market for 10 kWe – 400 kWe gas engines – CHP and power-only applications

**Delta-ee, UK &
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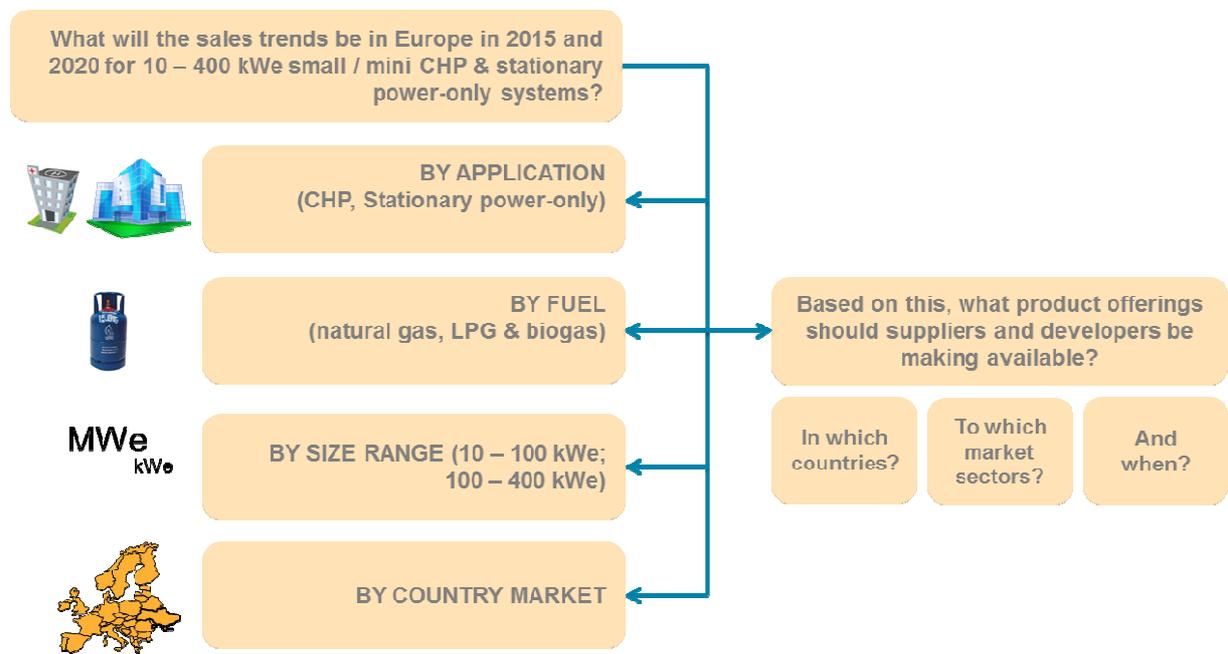


Mini & small-scale power systems in Europe – a growth market?

Some major new growth opportunities are arising in small / mini power system markets in Europe, driven by low carbon policies, an array of new products, strengthening energy efficiency trends and a brighter long-term outlook for spark-spreads.

Many of the signs look promising for growth. But what is the reality? Fukushima and the shale gas revolution tell us that energy market drivers can change at short notice - and how much confidence can there really be about good spark spreads? Could the promise of a growth market encourage a raft of new entry products and developers, creating a much more competitive market environment?

This Study, covering all fuels and all applications in the 10 – 400 kWe gas engine size range, will shed some bright light on these questions - in particular:



Benefits for early Study Subscribers

Companies agreeing to purchase the Study before the commencement of our research in April 2013 will receive four important benefits:



Scope of work & deliverables

To meet the needs described above, we propose the following scope for the Study:

PHASE I – 15 country Review & Screening	
	The research team will undertake a high level analysis of the 15 countries listed below (which are likely to account for 90%+ of the overall market), in order to identify the 5 countries which we believe have most potential to be included in the detailed Phase II analysis.
	Provisionally: <i>Austria, Belgium, Czech Republic, Denmark, France, Germany, Hungary, Italy, Netherlands, Poland, Romania, Spain, Switzerland, Turkey, UK</i>
Phase I. <i>High level review of 15 countries</i>	Phase I countries The initial screening will provide, for each of the countries, <i>key policy drivers, barriers, main players, current annual sales, spark spread, and high level projections (for 2015 and 2020) for the overall markets (natural gas, LPG and biogas, both for CHP and power-only applications and for the 10 kWe – 400 kWe size range).</i>
	We will provide preliminary recommendations to Study Subscribers in relation to the key questions highlighted above:
Recommendations	<ul style="list-style-type: none"> i. What product offerings should suppliers be making available? ii. To which market sectors? iii. In which countries? iv. And when?

PHASE II – Deep analysis of 5 countries

For each of the countries to be examined in more detail (likely 5 countries, accounting for 75%+ of the overall market), the research team will provide for 2015 and 2020 detailed sales projections (data in MWe and 000s / yr) segmented as follows:

Phase II. *Detailed market projections and segmentation for 5 countries*

Market application

Natural gas, LPG and biogas (including anaerobic digestion and landfill gas) both for CHP and stationary, power-only. These applications will be further segmented into the top 2-3 key market segments (residential, commercial, public buildings, etc).

Size range

Segmented as follows:

- a. 10 - 100 kWe
- b. 100 - 400 kWe

Methodology

We will also provide detail on our key assumptions and rationale for the projections that we provide. Our methodology for deriving forecasts includes analysis of a range of core market drivers that include:

- a. Policy incentives and barriers
- b. Project economics – including spark spread analysis and modelling of project paybacks / IRR
- c. Customer proposition - including analysis of customer decision making criteria

PHASE III – Study Recommendations & Presentation

We will provide preliminary recommendations to Study Subscribers in relation to the following key questions:

Phase III.

Recommendations.

- i. What product offerings should suppliers be making available?
- ii. To which market sectors?
- iii. In which countries?

Deliverables

We anticipate a 45-55 **page PowerPoint format report** (1 slide per country for Phase I; 4-5 slides per country for Phase II) structured according to the outputs above and including a stand-alone Executive Summary and annexes with relevant data sheets etc.

The report will have extensive use of clear graphics and data throughout. We devote considerable priority to the user-friendliness of our client deliverables - this is one of the reasons our clients rate our work highly.

Deliverables will include:

- ▶ Individual kick-off conference calls between Study Subscribers and the research team.
- ▶ Interim individual webinar presentations after initial high-level screen (Phase I).
- ▶ Delivery and webinar presentation (or presentation in Edinburgh at Delta-ee's office) of Final Report.

Time-scale of delivery

Phase I (High-level screening and recommendations for Phase II) – April, 2013

Phases II and III (detailed market projections and recommendations) – June, 2013

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Why Delta-ee & Energie & Management?



Delta-ee has a high reputation for delivering robust and highly regarded market research, analysis and data in global markets for on-site generation and distributed energy. In particular, we believe we have unrivalled capability in our deep understanding of current and future European market developments for CHP and distributed energy systems.

Our main client groups include equipment manufacturers, energy utilities and policymakers. Client feedback suggests that we routinely exceed expectations, with repeat business accounting for over two-thirds of our work being testament to this.

Evidence of this expertise is the quality of our clients, which includes the International Energy Agency, GDF Suez, RWE, GE Energy, Siemens, Caterpillar etc.

Selected client testimonials follow:

"We have used Delta-ee's services on a number of occasions to help us develop our decentralised energy businesses. On each occasion Delta-ee has provided us with first-rate analysis".

"We have been examining a major CHP opportunity in Europe and Delta-ee's market knowledge and insight into the factors affecting our decision making has helped us immensely."

"Delta-ee provides us with ongoing, first-class insight and advice to support our low carbon investment activities."

"Thanks again for your support on this project. It's been a pleasure working with you and Delta-ee and I'd not hesitate to use you again. I particularly appreciate your good communication with us and also your help and patience".

"Thanks for sending the Delta-ee study, which is excellent (as Delta-ee work always is)"

ENERGIE & MANAGEMENT

ZEITUNG FÜR DEN ENERGIEMARKT

Energie & Management, based in Germany, is an independent provider of information and services for the energy industry.

The German publishing house, founded in 1994, offers a broad range of publications and online information services covering topics and market information, which reflect the opinion of the European energy industry and energy policy with special focus on energy trading.

A team of 15 editors and a Europe-wide network of correspondents stand for competent obtaining, neutral editing and an innovative distribution of information relevant to the energy industry and the energy trading community.

Energie & Management also assists decision makers in the energy industry by performing studies and by offering exclusive consulting services and has earned a reputation of being among the best providers on the market.



**Commercial insight and market expertise in
decentralised energy and low carbon strategies**

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