AKU-BAT CZ
Association for Energy Storage

Unlocking Full Market Potential: Czechia

Energy Storage Summit CEE, Warsaw 2025

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PV + ENERGY STORAGE IN CZECHIA (30.6.2024)

4,83 GWp total installed PV capacity

357 MWp new PV connected in 2025 H1

(2024 H1: 484 MWp - decrease by 26 %)

174 MWh new batteries connected in 2025 H1

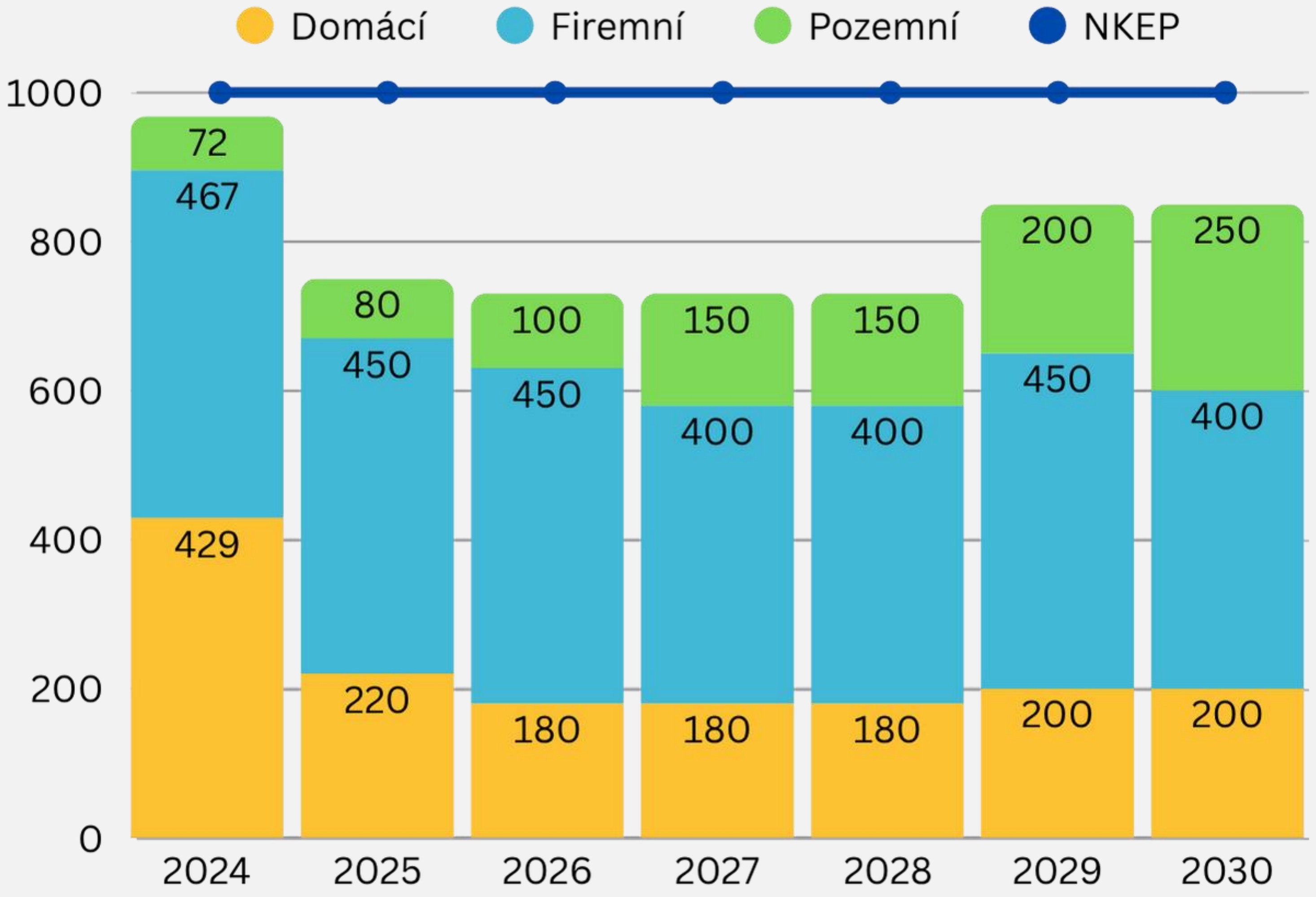
(2024 H1: 276 MWh - decrease by 37 %)

2,1 GWh total battery capacity combined with PV

+ more with other sources

Source: Solar Association, ČSRES

ESTIMATED ANNUAL SOLAR CAPACITY ADDITIONS (in MWp)



→ Forecasting is very difficult – reaching 1 GWp will likely not be achieved

→ The residential sector continues to face a negative trend

→ Installation companies are heading into a tough year, not all will survive – but poor management is not the reason

→ Acceleration zones must not become a tool to restrict the construction of PV and wind power plants

Source: Solar Association

<u>SOLAR SECTOR</u> – residential and C&I (30.6.2025)

- A total of **357 MWp** of new PV connected in 2025 H1 (2024 H1: **484 MWh**)
- Continuous **decline in <u>residential sector</u>**
  - Market is consolidating
  - Reasons: repeated changes in subsidy programs, lower electricity prices, market saturation to a certain extent
- **<u>C&I segment</u> under pressure, too**
  - Delays in subsidies from MPO operational programs + issues with digitization of permitting system
  - Projects planned in 2024 are only now starting, otherwise quite

Source: Solar Association, ČSRES

<u>SOLAR SECTOR</u> – utility scale / ground-mounted (30.6.2025)

- <u>Ground-mounted PV sector</u> remain stagnant

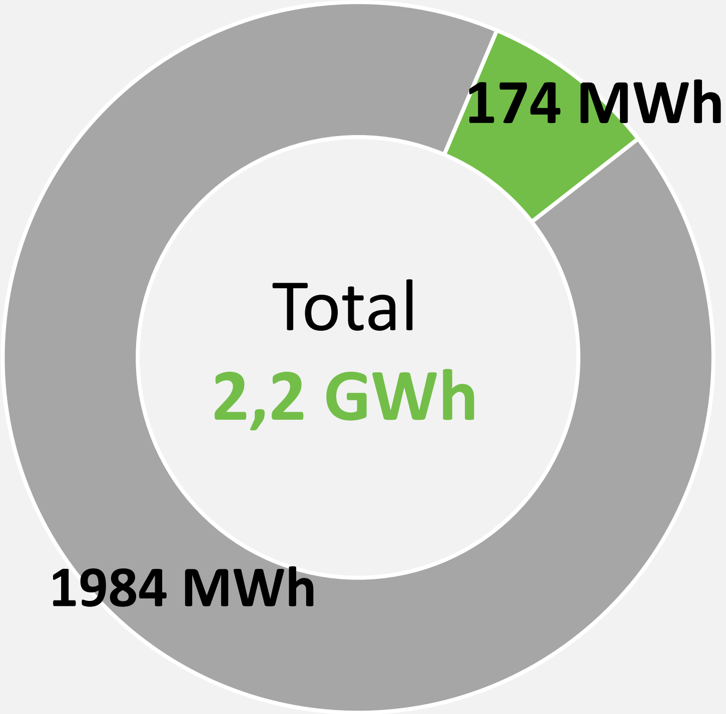
Major barriers:

  - Slow permitting
  - Difficult financing
    - Nearly impossible without BESS
    - Missing CfD and PPAs
  - **DSO capacities** (for PV as well as for BESS) and permitting
- Advanced rules for Agri-PV

Source: Solar Association, ČSRES

ENERGY STORAGE BY INSTALLED CAPACITY (30.6.2025)

Current state (BESS with PV)



174 MWh new batteries connected **2025 H1**

- 85 % Residential sector
- 12 % C&I
- 3 % Utility & Large scale

8 % of total battery capacity connected in the first half of 2025

ENERGY STORAGE – sectors (30.6.2025)

- A total of **174 MWh** of storage capacity connected in 2025 H1 (2024 H1: **276 MWh**)
- **Slowing growth in battery storage**
  - Reason: **ongoing slowdown in the residential sector**
  - **89 % of PV on family houses** are built using energy storage
- **Shift toward large-scale projects (C&I and especially utility-scale)**
- **Large-scale solar (above 1 MWp) with BESS:**
  - Still low - **5 out of 26 (19%)** of new large PV plants include energy storage (BESS)

Source: Solar Association, ČSRES

LARGE-SCALE BESS IN CZECHIA

- Some of the large-scale BESS projects connected in 2024/25
  - <u>not included in previous statistics!</u>

2024	2025
Decci, E-Nest (Vraňany): 22 MWh	**LG/LTW Battery: 29 MWh**
C-Energy (Planá nad Lužnicí): 22 MWh	C-Energy (Tábor): 5 MWh
ČEZ (Vítkovice): 9,45 MWh	UCED (Kutná Hora): 4,5 MWh

- **Plus <u>tens of MWh</u> in other smaller projects**

+ additional **<u>thousands of MWh to be connected by 2030</u>**

Source: AKU-BAT CZ

ON A THRESHOLD OF A BATTERY BOOM IN CZECH REPUBLIC

- **Massive growth in the BESS sector (1 MWh+)** expected, especially in stand-alone solutions
- **Stand-alone installations** – yet none (due to missing legislation until now)
  - Next year will already show a noticeable increase in numbers
- Construction to be triggered by **Lex RES III** (in force from October 1st), favorable conditions negotiated for BESS operations and CAPEX subsidies
  - Amendment to the Energy Act, secondary legislation and Modernization fund
  - Applications for **thousands of MWh in stand-alone BESS** for grid connection to DSOs and TSO

Source: Solar Association, ČSRES

BATTERIES ARE NOT A GUARANTEE OF EASY PROFIT

- After years of awaiting, the extremely booming market for stand-alone battery storage might face some negative effects

- We have long warned that **capacity for ancillary services (SVR) is limited** and will fill up quickly – there won't be space for everyone

- It is crucial to consider **commercial / business flexibility** as the main business path for the future

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Domácí Podniky Zahraniční Doprava Spotřebitel Test DNES Daně Zásoby plynu

Czech Republic Awaits a Boom in Battery Storage — Association Warns Against the Illusion of Easy Profit

Energetici začnou od října nově zapojovat do distribuční soustavy v Česku samostatně stojící bateriová úložiště. Češi dosud zažádali o rezervaci kapacit pro úložiště na tisíce megawatthodin (MWh). Jsou mezi nimi i velké systémy s kapacitou několika stovek MWh. Dosud největší zprovozněné úložiště má přitom kapacitu 29 MWh, uvádí Asociace pro akumulaci energie AKU-BAT CZ.

The Czech Dream of Profiting from Battery Investments Shows Cracks

JAN FOUSEK

Výkonný ředitel Asociace pro akumulaci energie AKU-BAT a předseda představenstva Solární asociace

+ sledovat 9

LEX RES III FINALLY APPROVED - WHAT’S NEXT?

- Czech TSO (CEPS), Energy Regulatory Office (ERÚ) and finally even Ministry of Industry and Trade very supportive – finalization of secondary legislation
- **Double-charging elimination & favorable fees** for stand-alone BESS
- **„1st category storage facility“** – Significant fee waiver *(about 90 % of fees)*
- Ongoing negotiations with DSOs **on BESS connection conditions**
  - Working groups with DSOs, TSO, AKU-BAT, Ministry of Industry & Trade and ERU *(on both, connection and flexibility)*
  - Application for stand-alone BESS started being accepted on **<u>19th of September 2025</u>** (with the „last-opposing“ DSO)

EVEN MORE POSITIVES FOR BESS

- Other major legislative change for BESS development – **the „BIM Act“**
  - **BESS over 100 KW** as a **subject of public interest**
  - Jurisdiction of building authorities for BESS and RES
- **Subsidies** quite generous (CAPEX only) – Modernization fund
  - Ongoing **call for stand-alone BESS:** huge interest – budget exceeded by about 10x
- **Network capacities freeing up by recently passed law amendments**
  - **Non-refundable** connection deposits
  - **Ban of loadbanks from 1/2026** – even higher need for BESS & Flexibility

KEY TAKEAWAYS – CZECH ENERGY STORAGE SECTOR

- **PV & BESS both on massive rise, market understanding of the urgence of storage**
  - **Less by populist part of Political parties, unfortunatelly to take over government in few weeks**
- **Storage & Flexibility finally legally anchored - effective from Oct 1st 2025**
  - Double-charging removal and distribution fees´ significant reduction agreed
  - PV + storage possible already in full extent
- **Subsidy programs**
  - Existing successful subsidies for RES & BESS and even new ones for stand-alone solutions

BE PART OF THE EXCITING NEW BESS MARKET IN CZECHIA

JOIN US!

AKU-BAT CZ
Association for Energy Storage

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