

Opportunities for international businesses

DIGITIZING GERMANY'S ENERGIEWENDE

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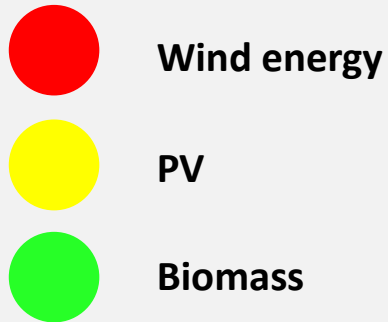
The Economic Development Agency of Germany



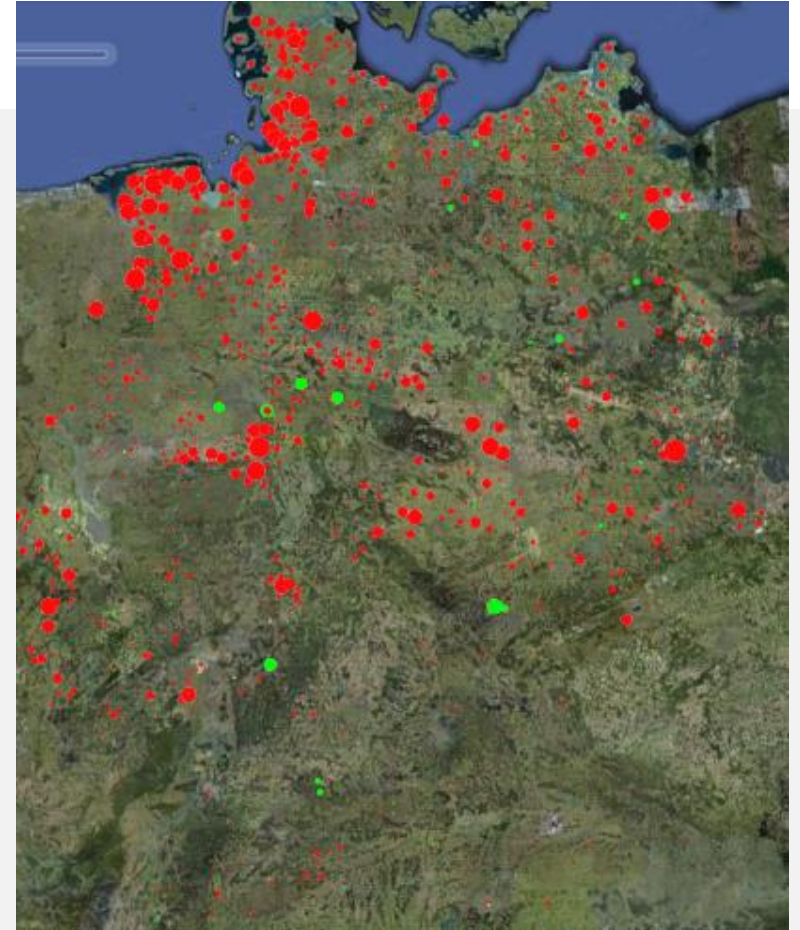
Development of Renewable Energy Systems

Total capacity of renewables (End 2000)

~ 30,000 installations



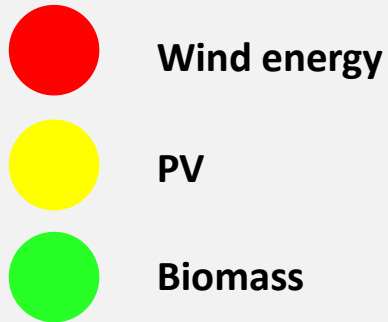
The circle **diameter** is proportional to the electrical capacity



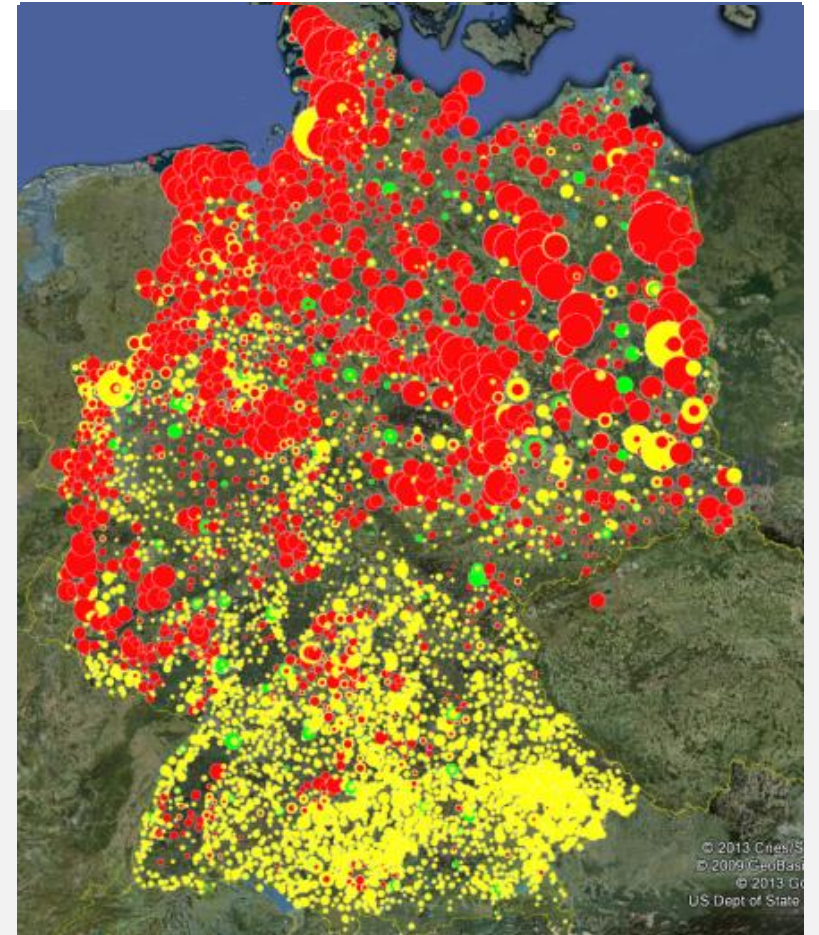
Development of Renewable Energy Systems

Total capacity of renewables (2020)

> 1.8 million installations

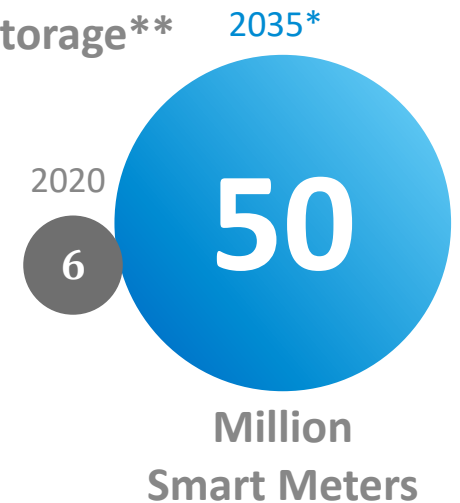
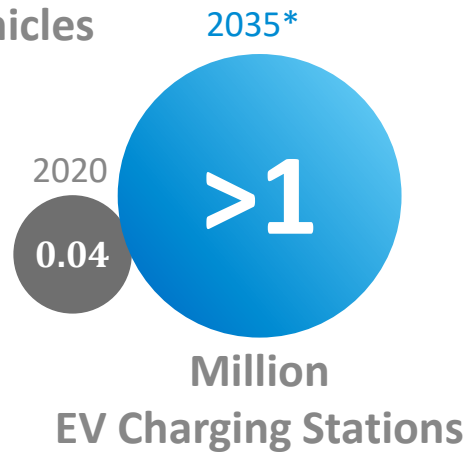
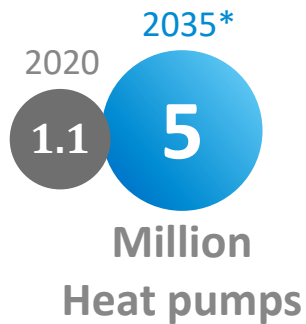
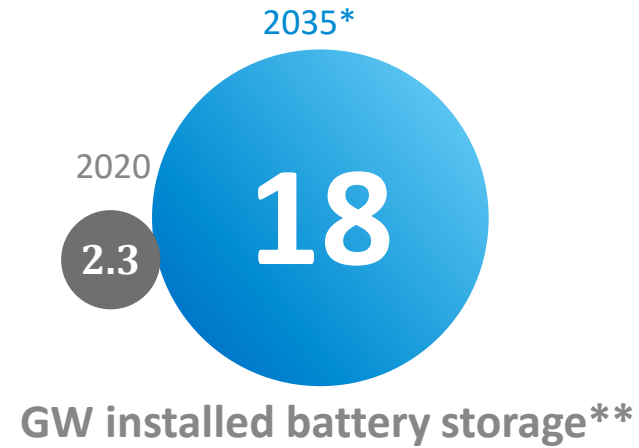
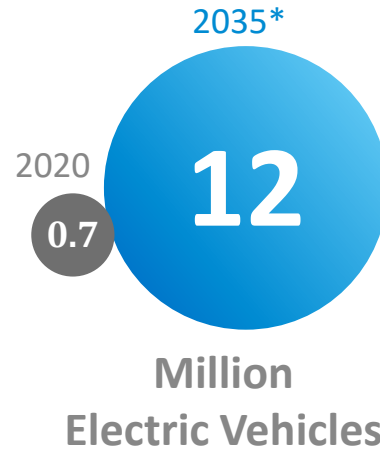
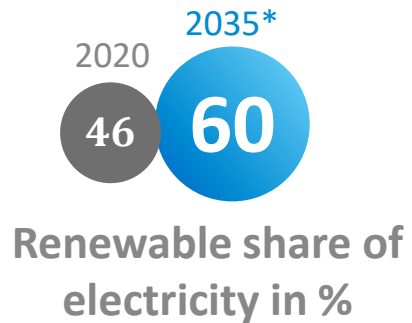


The circle **diameter** is proportional to the electrical capacity



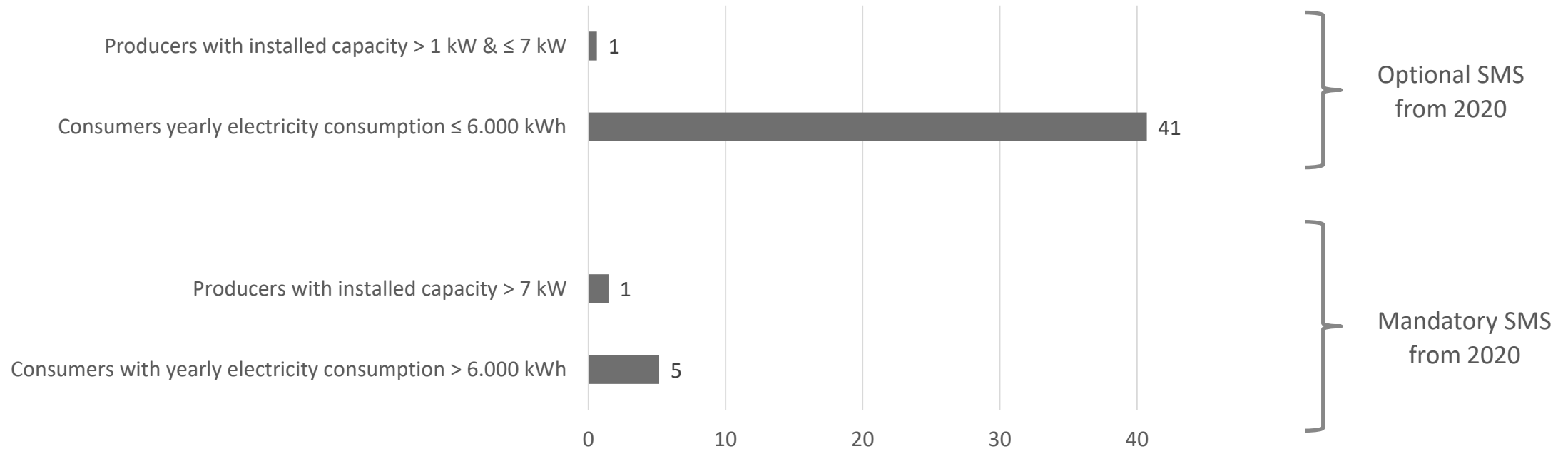
Sources: 50HertzT, TenneT, Amprion, TransnetBW, internal data

Germany's Energy Market Will Look Different By 2035



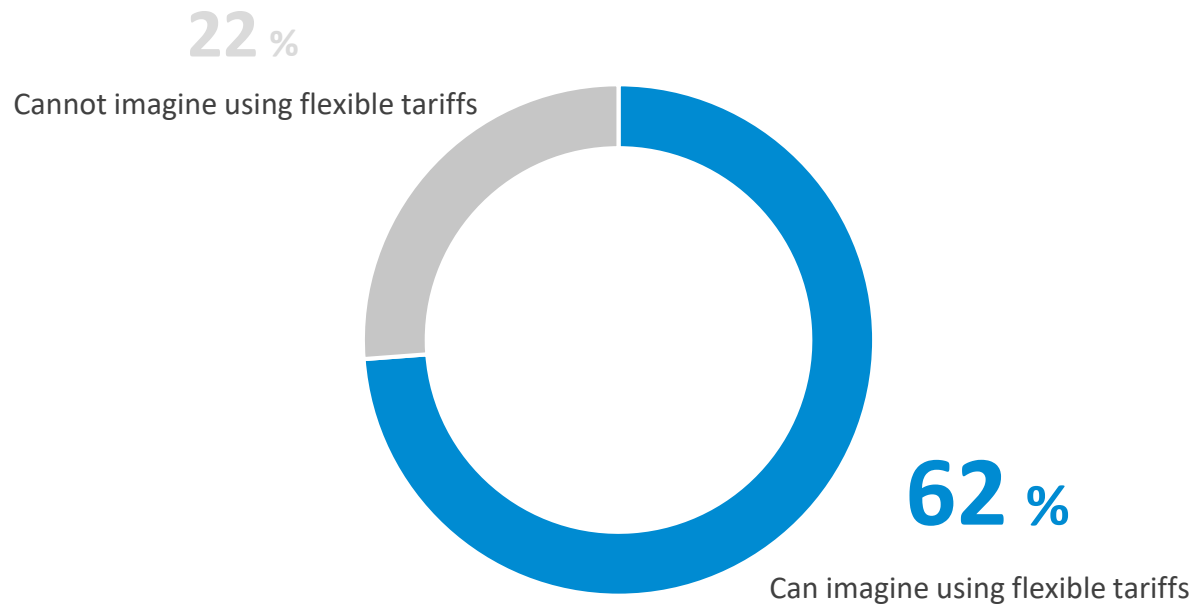
Smart Meter Roll-Out In Germany

By 2032, >50 million meters will be digital – and many ‘smart’



Smart Meter Roll-Out Enables New Business Cases

Customer approval for flexible tariffs
In % of respondents in Germany, 2019

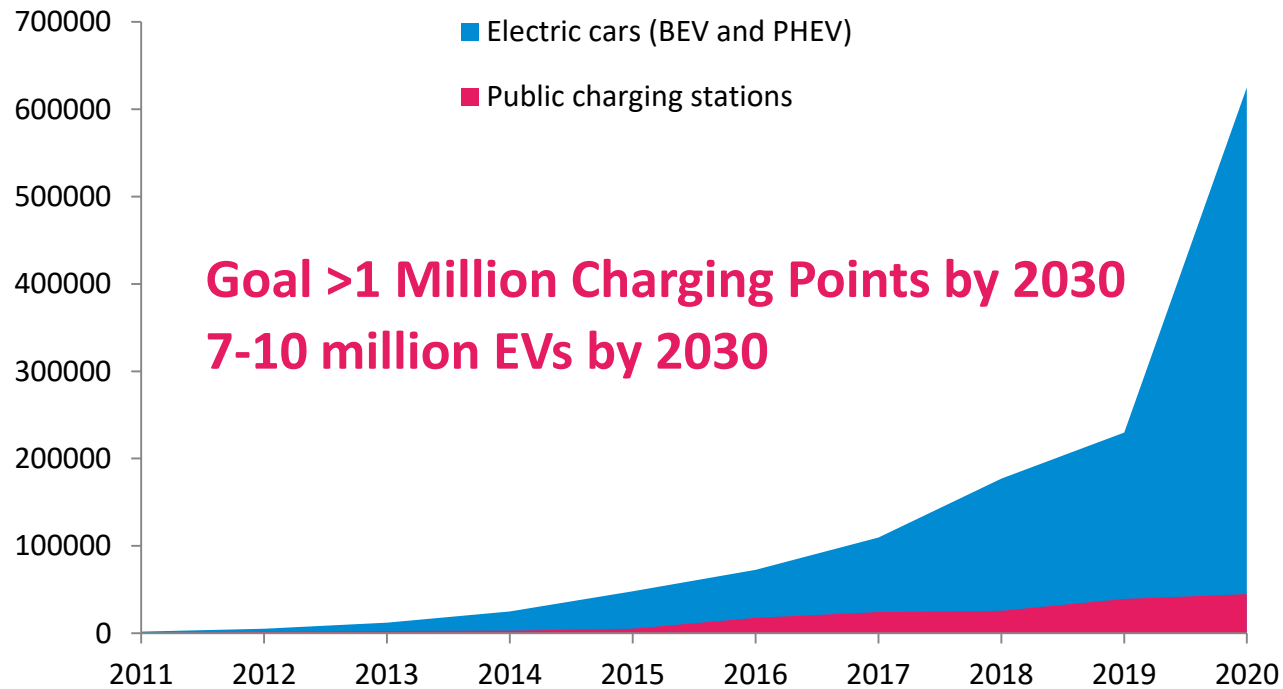


Source: Bitkom, 2020



2020: EV Market Takes Off - Charging Infrastructure Following

Electric vehicles (PHEV + BEV) vs. public charging stations
(Number of units, 2011 – 2020)



Source: IEA 2018, 2019

Growth in the EV market creates demand for charging stations – potentially equipped with batteries and smart grid technologies

Vehicle-to-Grid: New Standards on the Way



Co-Project between

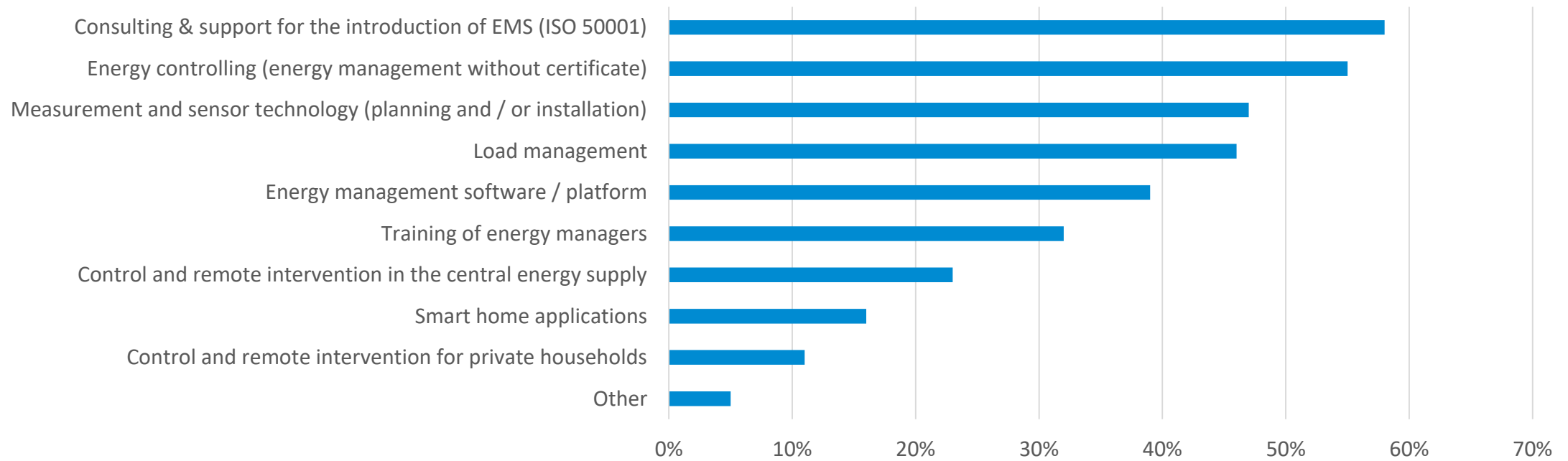
- The Mobility House (energy management technology)
- ENERVIE (energy supplier)
- Amprion (transmission system operator)
- Nissan (V2G vehicle)

2018: First Nissan Leaf prequalified for primary control power.

2020: General V2G communication standards under development.

Which EM Services are Most in Demand?

Range of services offered in Germany



Attractive EMS Incentive Programs

Energy-saving meter



KfW Smart home



Energy efficiency in business



Ready to Help Your Company Set Up in Germany Successfully



enersis Europe GmbH

Dr. Christina Wuerthner, Chief Finance & Strategy Officer

“The **market potential**, the **support of GTAI** and the Brandenburg Economic Development Board, the **proximity to important political decisions** in Berlin, **space to grow** and the access to **highly-skilled labor** locally, as well as from all over Europe, eventually all counted for our decision.”

“Starting in mid-2019, GTAI helped us solicit **more than 130 locations** around Germany and systematically compare them. We were very enthusiastic about the **opportunities and resources on offer in Germany.**”



Enapter GmbH

Thomas Chromtzka, Head of Strategy

Get in touch!

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