



Global Energy Transition (GET) Matrix

Market Intelligence and Data Analytics
Platform for the Global PV Markets

20+
YEARS
EUPD Research

BACKGROUND

- Over the last decade, the global solar PV industry has evolved rapidly
- Due to the reduced costs of solar PV and its increased competitiveness against other forms of energy, solar PV is well positioned to become one of the major sources of energy in the years to come
- Today, 50+ country markets globally are using solar power to fulfill their electricity requirements and the number of countries adopting this clean source of energy will only increase in the future
- Consequently, in order to be successful in the global markets, it is important to monitor them continuously, develop and adapt strategies and enter emerging markets based on accurate KPIs at the right time to grow your business

KEY QUESTIONS:

Q. Which PV markets are booming or will boom in the near-future?

Q. What impacts will the regulatory policies have on the market development?

Q. What are Solar PV targets in these markets?

Q. Who are the right partners with whom tie-ups would be beneficial?

Q. Can companies base the entry into markets based on scientifically devised parameters?

In a competitive environment, companies need to identify and participate in the most lucrative PV markets by assigning resources and efforts judiciously

GLOBAL ENERGY TRANSITION (GET) MATRIX

- Global Energy Transition (GET) Matrix is a [market intelligence and data analytics platform](#) which can be accessed [365 days a year](#) to gain insights into the latest developments in [50+ global PV markets](#)

Market Data

- Solar PV installations (achieved & projected)
- Electricity market dynamics
- Electricity Tariffs
- Regulatory mechanisms
- Solar PV tenders

Expert Content

- Top News
- Downstream stakeholders
- EUPD Research Insights and expert opinions

Intelligence & Analytics

- Compare & analyze markets based on
 - Attractiveness of funding schemes
 - Market size and segments
 - Electricity tariffs
 - LCOE
 - Inflation
 - Solar PV Targets

- The tool is accessible to users on a [yearly subscription based model](#) and is updated on a continuous basis by EUPD Research analysts

GET Matrix is designed to assist subscribers monitor and update their know-how about the ever changing solar market dynamics. The matrix serves as a basis to develop strategies, enter emerging markets and strengthen market position in existing geographies



GLOBAL ENERGY TRANSITION (GET) MATRIX

COUNTRIES TRACKED *



GET Matrix covers
50+ PV markets
globally

GLOBAL ENERGY TRANSITION (GET) MATRIX

COUNTRIES TRACKED *

Africa	Asia	Europe	Europe
Egypt 	India 	Austria 	Netherlands 
South Africa 	Japan 	Belgium 	Poland 
Middle East	South Korea 	Bulgaria 	Portugal 
Iran 	Pakistan 	Czech Republic 	Russia 
Iraq 	Singapore 	Denmark 	Romania 
Israel 	Sri Lanka 	France 	Slovakia 
Jordan 	Vietnam 	Germany 	Slovenia 
Kuwait 	Oceania	Greece 	Spain 
Saudi Arabia 	Australia 	Hungary 	Sweden 
Oman 	New Zealand 	Italy 	Switzerland 
UAE 	North America	Luxembourg 	Turkey 
Yemen 	Canada 	Malta 	UK 
	USA 	South America	Ukraine 
	Mexico 	Brazil 	
		Chile 	

* - List of country markets tracked in the GET Matrix – EUPD Research reserves the right to add or delete or modify +/-5 country markets from the list in case global package is opted for

GLOBAL ENERGY TRANSITION (GET) MATRIX

CONTENT OVERVIEW (1/4)

GET Matrix tracks multitude of parameters which affect and reflect the solar PV development in the 50+ country markets. These parameters are updated for all country markets on a regular basis by EUPD Research analysts:

Data		SOLAR PV	<ul style="list-style-type: none">• Solar PV Installed Capacity (segment wise) – Historical up to 2020• Projected Solar PV Installed Capacity (segment wise) – 2021E to 2025E• Cumulated Solar PV Installations• Funding / Incentive Schemes and regulatory policies• Average Solar Irradiation
		ELECTRICITY MARKET	<ul style="list-style-type: none">• Electricity Mix• Electrification Rate• Electricity Prices (Average Residential, Commercial and Industrial)• Share of Renewables in Electricity Production• Power Outages (System Average Interruption Duration Index)
		REGULATORY & ECONOMY	<ul style="list-style-type: none">• Renewable / Solar Energy Targets• List of government authorities in-charge of promoting renewable / solar energy• Interest Rates and Currency Exchange Rates• Gross Domestic Product• Per Capita Income

GLOBAL ENERGY TRANSITION (GET) MATRIX

CONTENT OVERVIEW (2/4)

GET Matrix tracks multitude of parameters which affect and reflect the solar PV development in the 50+ country markets. These parameters are updated for all country markets on a regular basis by EUPD Research analysts:

Expert Content



STAKEHOLDERS

- Long-listing of major companies active in the downstream segment



TOP NEWS

- Latest regulatory, tender results, company related news
- Technological related news articles



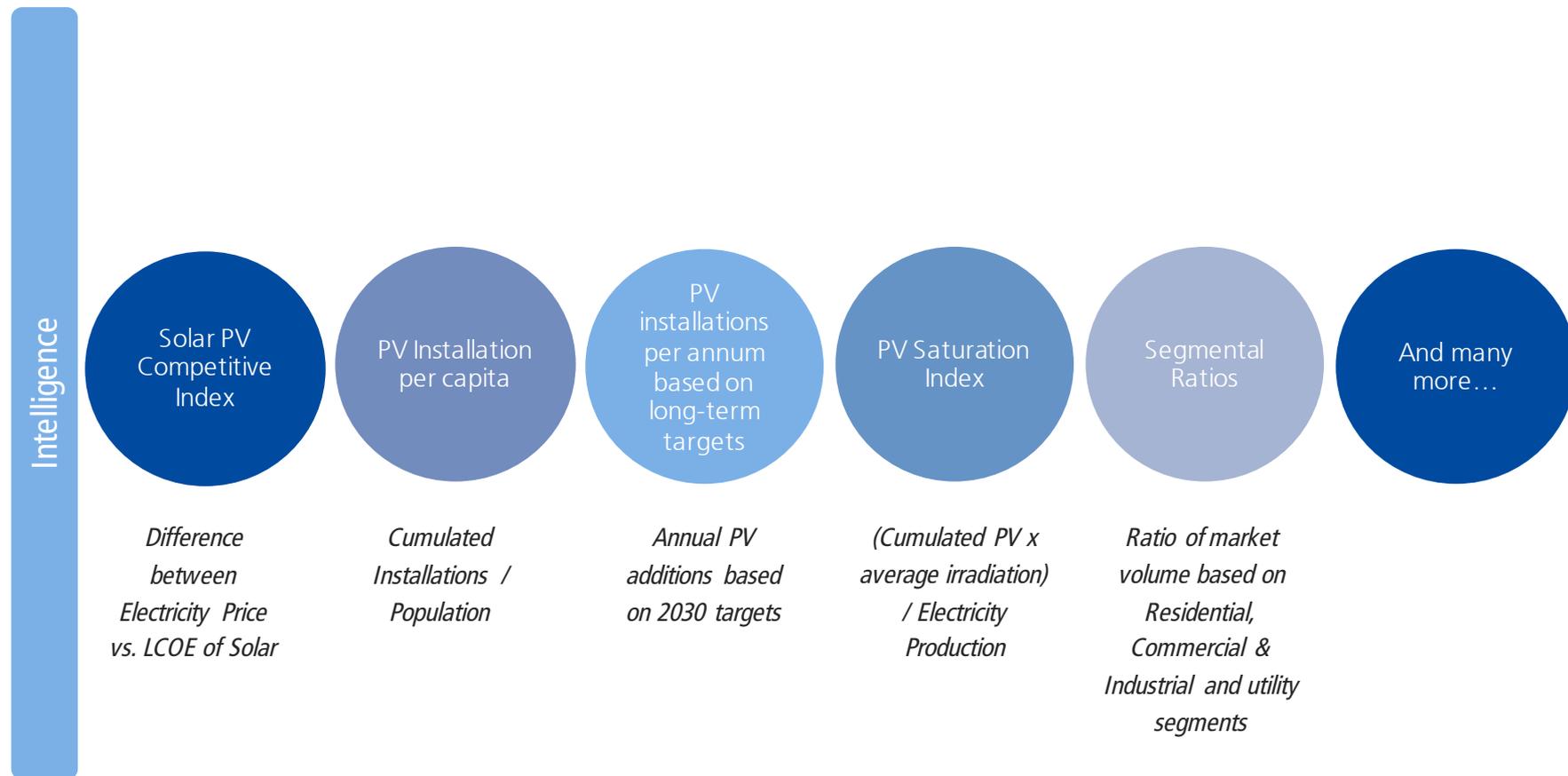
EUPD RESEARCH INSIGHTS

- Key trends and insights on market development
- Expert Opinions

GLOBAL ENERGY TRANSITION (GET) MATRIX

CONTENT OVERVIEW (3/4)

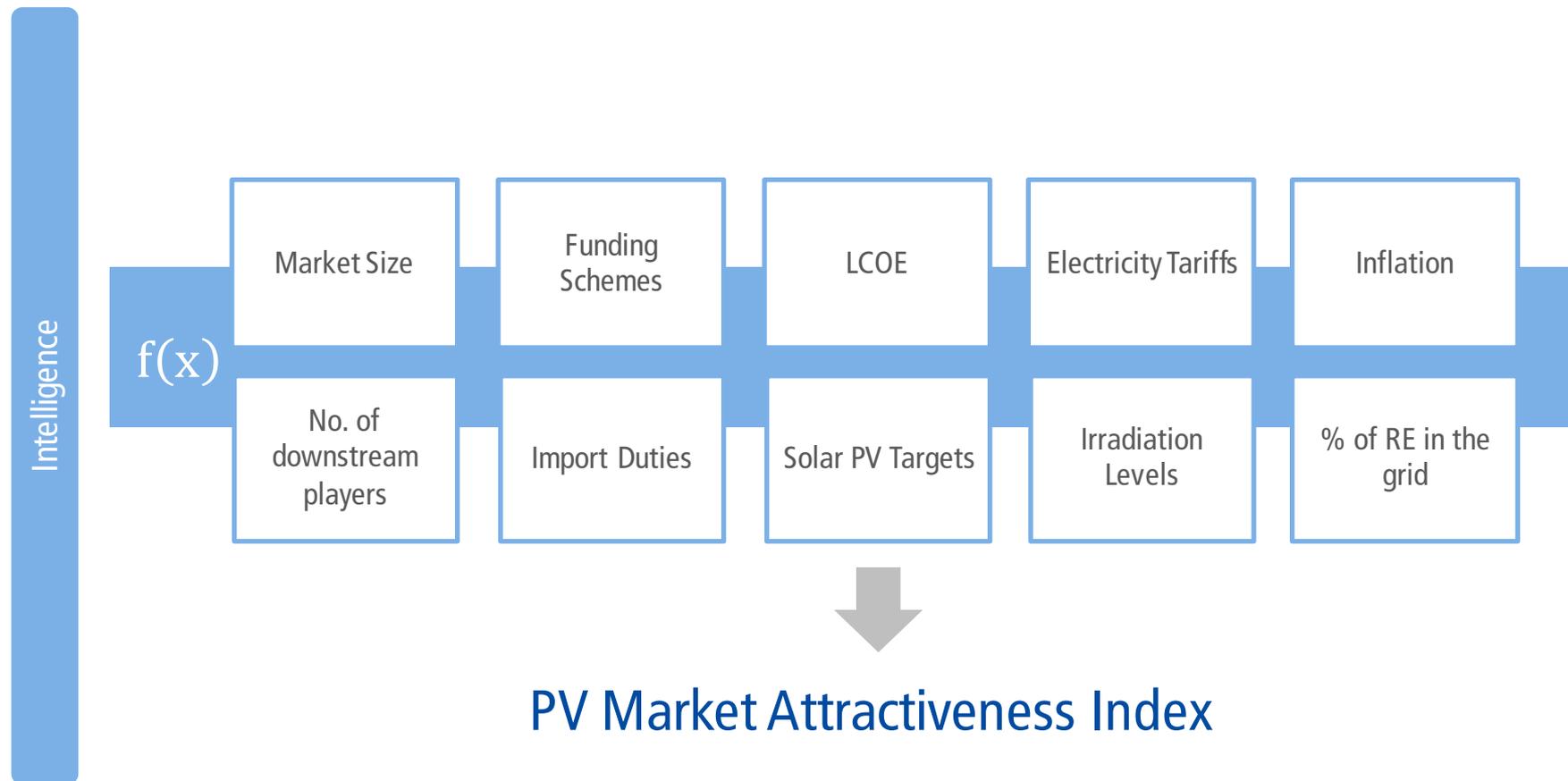
Based on the parameters tracked, EUPD Research has developed smart key performance indicators (KPIs) which indicate the potential of PV markets and the expected developments



GLOBAL ENERGY TRANSITION (GET) MATRIX

CONTENT OVERVIEW (4/4)

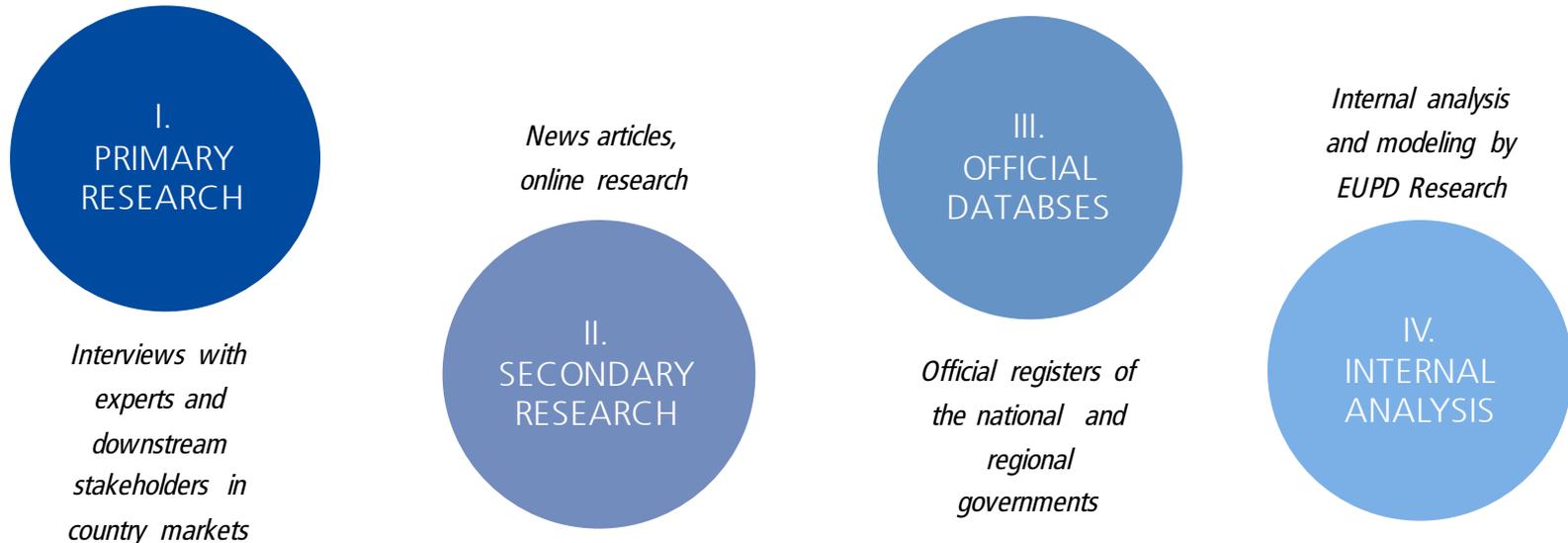
Based on the various parameters tracked, EUPD Research has developed a 'PV Market Attractive Index' on country and segmental level, a key performance indicator (KPI) and to scientifically evaluate market opportunities and develop tailored strategies



GLOBAL ENERGY TRANSITION (GET) MATRIX

SOURCES

The data gathering and PV market forecasts for the GET Matrix are built using multiple sources including [primary research](#), secondary research, access to official databases and internal analysis and modeling by EUPD Research analysts.



The [highly precise](#) and [accurate data](#) from the GET Matrix allows companies to:

- Target the most important PV markets efficiently
- Derive clear narratives and possibilities within markets
- Assist in planning and executing strategies within the most lucrative global PV markets

GLOBAL ENERGY TRANSITION (GET) MATRIX

CONSULTATION

- In addition to the access to the GET Matrix, the subscribers will get up to 2 hours of free consultation* call(s) with the EUPD Research analysts each quarter (in case of booking the Global Package only) should they prefer to discuss the contents of the GET Matrix with our analysts
- The subscribers to the GET Matrix will be required to seek an appointment 3 weeks in advance and submit their questions beforehand
- Providing a detailed outline of the questions beforehand will ensure that our consultants can provide you the best possible service
- Instead of the consultation, EUPD Research can provide a Global Market Overview presentation to your management each quarter to keep them updated on the latest developments globally (Note: presentation will be given in English only)

* - *in case of booking the Global GET Matrix Package only*



GLOBAL ENERGY TRANSITION (GET) MATRIX

STAKEHOLDER GROUPS

GET Matrix caters to various stakeholder groups and benefits them by providing data on the latest developments on solar PV markets



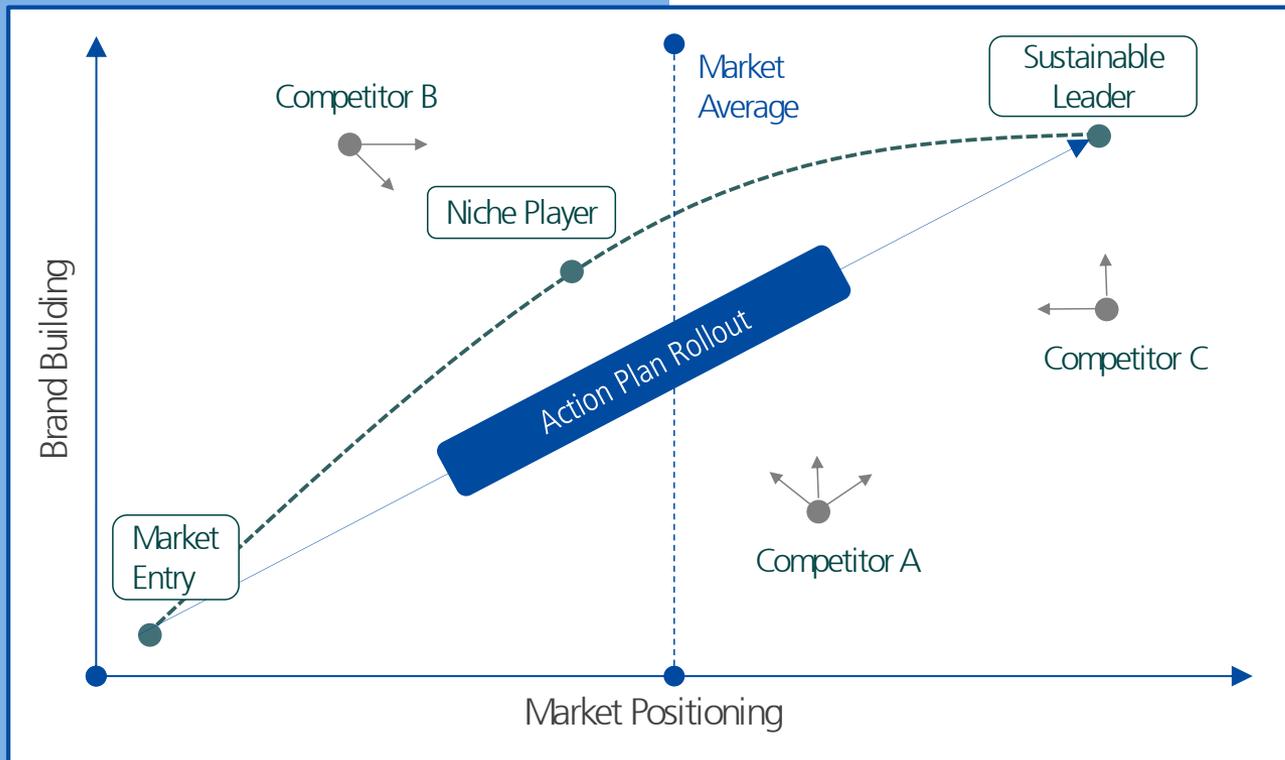
Benefits of the GET MATRIX:

- Be informed about all relevant solar markets at all times
- Develop a clear market understanding
- Benchmark your internal data with data from EUPD Research analysts
- Identify emerging markets at an early stage
- Find co-operation partners
- To have a holistic view of the global photovoltaic market
- Get data and market information to present individual country markets, regions or the global market to investors

GLOBAL ENERGY TRANSITION (GET) MATRIX

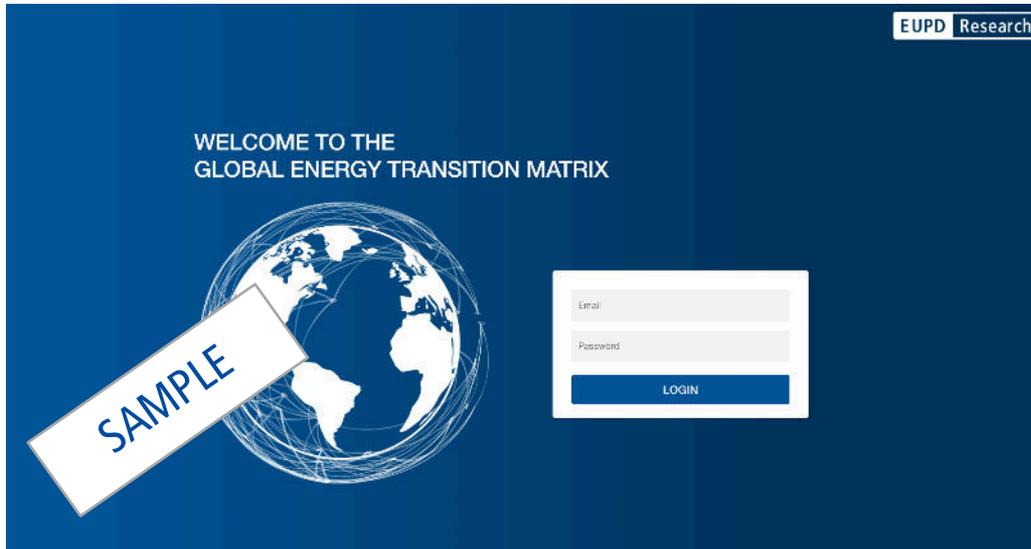
SUSTAINABLE LEADERSHIP

Leverage the data and expertise of EUPD Research to identify the most lucrative PV markets and develop strategy to position your company as a sustainable leader



GLOBAL ENERGY TRANSITION (GET) MATRIX | SAMPLE SCREENSHOTS

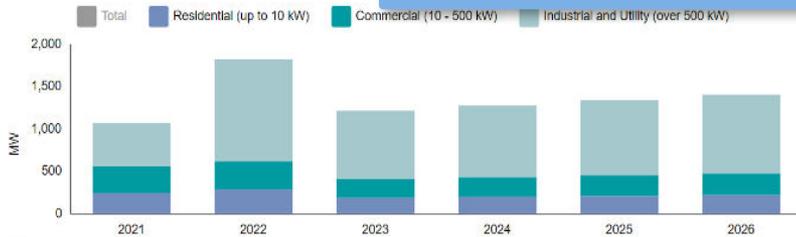
Subscribers will be provided with login credentials to securely access the tool with the access level depending on the subscription at continental / global basis



GLOBAL ENERGY TRANSITION (GET) MATRIX | SAMPLE SCREENSHOTS

Subscribers can choose to study the statistics and information within the tool by country which will be updated on a regular basis by the EUPD Research analysts

PV market forecast



Source: EUPD Research | Section last updated: 20th May 2021

Funding scheme

Funding scheme	Residential	Commercial	Industrial
Feed-in tariff	Residential	Commercial	Industrial
	Yes	Yes	Yes
	Yes	Yes	Yes
Direct marketing	Residential	Commercial	Industrial
	Yes	Yes	Yes
	Yes	Yes	Yes
Not marketing	Residential	Commercial	Industrial
	Yes	Yes	Yes
	Yes	Yes	Yes
Investment grant	Residential	Commercial	Industrial
	Yes	Yes	Yes
	Yes	Yes	Yes
Tax credit	Residential	Commercial	Industrial
	Yes	Yes	Yes
	Yes	Yes	Yes
Tender process	Pay as you go	Uniform pricing	PV only tender
	Yes	Yes	Yes
	Yes	Yes	Yes
Lombard tender (different technologies)	Residential	Commercial	Industrial
	Yes	Yes	Yes

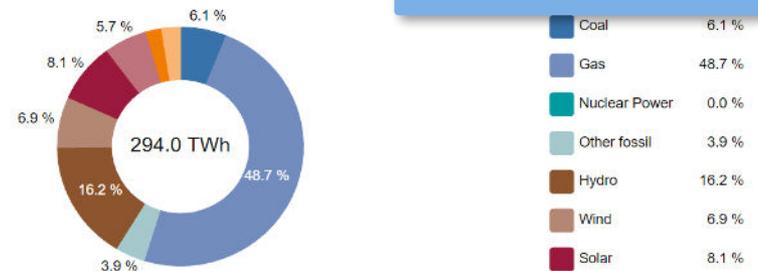
Source: GSE (Energy Service System Operator) | Section last updated: 20th May 2021

Electricity prices



Source: Eurostat, Italian Regulatory Authority for Energy, Networks and Environment (ARERA)

Energy sources

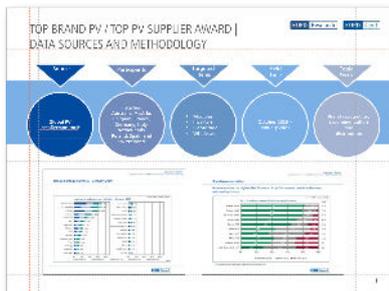


ABOUT US

EUPD Research

Market Research

- Market Analyses
- Competition Analyses
- Product Analyses
- Price Analyses



EUPD Cert

Certification

- Top Brand PV
- Top PV Supplier
- Customer Satisfaction
- Energy Transition Award



EUPD Consult

Exclusive Consulting

- Strategy | Politics | M&A
- Within the scope of strategic consulting projects, we focus on the review, further development or redevelopment of the company's orientation, we rethink concepts, measures or the positioning within the competitive environment and shape growth paths and business models
- Our future-oriented consulting services analyze both the corporate environment and the fundamental objectives of the client

ABOUT EUPD RESEARCH

References in the energy market segment (extract)

<p>MANUFACTURING COMPANIES</p>	    	    	    	    
<p>UTILITIES</p>	 	 	 	 
<p>GOVERNMENT & ASSOCIATIONS</p>	 	 	 	 

GENERAL TERMS AND CONDITIONS OF BUSINESS I

1. Scope

1.1 All contracts between EUPD Research Sustainable Management GmbH (hereafter EUPD GmbH) - and the customer shall be subject to the following terms and conditions only. The customer's terms and conditions of business shall not be applicable and shall not put EUPD GmbH under any obligation to comply unless EUPD GmbH explicitly gives written acknowledgment and acceptance of such conditions.

1.2 Offers are aimed exclusively at commercial clients, that is, companies according to Article 14 BGB (German Civil Code). Private customers, that is, customers according to Article 13 BGB, are not permitted to place legally binding orders based on the aforementioned. Interested private customers should contact EUPD Research by telephone for information on how to place a non-commercial order. Furthermore, the legal right to return items as stated in consumer protection law does not apply to orders placed by commercial clients but does apply to orders placed by private customers.

2. Offer and Ordering Process

2.1 The presentation of the products together with the order form does not constitute a legally binding offer. Offers are subject to the written confirmation of EUPD GmbH. They are designated for the internal use of the customer only.

2.2 The purchaser places a binding offer for the product of choice when all relevant purchase details have been given and the general terms and conditions of business accepted. This will be confirmed immediately by email or fax sent to the address given by the customer. The contract to purchase between the purchaser and EUPD GmbH is valid from when the order is confirmed, or, the products are delivered either by mail or download.

3. Scope of Services, Remuneration and Prices

3.1 Services offered include but are not limited to the following:

a. Multi-Client-Services: client-independent studies for an indefinite number of customers.

b. Shared-Services: commissioned study on behalf of a limited number of customers for the exclusive purchase of those customers.

c. Exclusive-Services: assignments carried out on behalf of a single customer who will have the exclusive license to use the product but only for an individually negotiated period of time. This exclusive license will be for a period no longer than 12 months. After a period of no longer than 12 months it will become a non-exclusive license.

3.2 The prices are net prices in Euros. They do not include sales tax/VAT or delivery costs. Sales tax/VAT will be added to the net costs according to the legally defined percentage. The prices valid at the time of ordering are binding.

3.3 Travel expenses incurred for EUPD GmbH workshops either provided in combination with studies or booked separately are not included in the scope of the offer. Prices have to be paid separately by the customer. This does not apply if it is explicitly agreed that the workshop or the resulting travel expenses for the workshop are part of the negotiated contract and thus do not have to be paid separately.

3.4 Should circumstances arise beyond the control of EUPD GmbH which impose a temporary hindrance on the provision of services, then services and delivery appointments agreed on will be extended. Customers will be informed of any such event or other delay immediately.

4. Terms of Payment and Delivery

4.1 Payment is to be made to the amount and method stated in the contract. Any addition and/ or aberration require the written confirmation of EUPD GmbH in order to be effective.

4.2 Payment is generally to be made upon receipt of invoice. The products will be shipped as soon as full payment has been made to the account of EUPD GmbH.

The terms and conditions for payment and delivery of Shared- Services and Exclusive-Services are stipulated in the binding offer.

4.3 Delivery costs depend on the quantity of products ordered, their destination as well as type of delivery. There are no delivery costs for products which can be downloaded. The customer accepts that any fees or charges owed for customs or non-EU addresses will not be paid by EUPD GmbH nor is EUPD GmbH liable for them.

4.4 The method of delivery, route and company employed to deliver will be chosen by EUPD GmbH at their sole discretion. Once the purchaser has taken delivery of the item from the delivery service, the purchaser is responsible for the item. The company responsible for delivery is to be made aware of any damage sustained in transit immediately. These damages are also to be reported to EUPD GmbH immediately. Part deliveries are permissible where appropriate.

GENERAL TERMS AND CONDITIONS OF BUSINESS II

4.5 EUPD GmbH retains ownership of all goods and all licensing rights pertaining to the usage of data files as well as intellectual property until payment of invoice has been made in full. Intellectual property rights are lawfully retained by the author.

4.6 The purchaser is only able to offset counter claims if they are acknowledged by law, uncontested, or prior written consent has been granted by EUPD GmbH. Customers are only have the right of retention if counterclaims are based on the same contractual relationship. The customer is prohibited from transferring any claims of payment against EUPD GmbH to a third party.

4.7 The estimated costs for the services provided by EUPD Research are based on project calculations and experience. Estimations are optimized and customer-oriented so that lower deviations may not be assumed.

However, it cannot be fully excluded that additional effort maybe required in the completion phase of the project. Should the suggested amount be exceeded, EUPD Research will inform the client promptly. Such additional efforts will be calculated on the basis of man-day costs and these may vary according to the qualification of the staff involved.

Upon notification of these additional costs the client may choose whether the project shall continue in accordance with the original cost estimation as stated in the proposal although full completion of the project may no longer be possible or agree to the revised cost estimation thus enabling full completion of the project. Should the client agree to the latter, this shall be subject to a separate written agreement.

5. Copyright and Licenses

5.1 The products and their intellectual property are protected by copyright. It is only possible to purchase a license to use the product and not the product itself or its content. The author/ creator remains the owner of intellectual property.

5.2 The customer is granted a non-transferable and non-exclusive license to use the product and the results and content in the product (with the exception of Exclusive-Services) for personal use only. As far as the customer (for example an agency) exclusively acts as the purchaser for a user mentioned by name within the order, then the right of use applies solely for said user.

5.4 Permission to use the licensed product in the national and international affiliates of the company is subject to the written approval of EUPD GmbH.

5.5 Any use of the product not explicitly permitted under copyright law is prohibited without the prior written consent of EUPD GmbH as the licensor and/or the written consent of the author. This includes but is not limited to copying, distributing, publishing, translating, saving, processing and reproducing the work in databases. Non-compliance will be prosecuted

6. Liability

6.1 The products were prepared with the utmost care, using professional methodologies and taking relevant legislation into account with the aim of assuring the best possible accuracy of the studies and their results. The data contained in this product is based on surveys of sample populations, conducted using standard statistical methods to the best of our knowledge. As such the study is subject to a certain statistical error rate and is based exclusively on the facts which were available at the time of the survey. Due to the aforementioned, no guarantee can be given for the accuracy and completeness of the studies and the data made available in them.

6.2 The studies contain specific information, but explicitly do not contain any definite recommendations on investments or actions to be taken. Should the user, having taken the above mentioned into consideration, choose to use the studies to support their decision making process, EUPD GmbH shall not assume liability for the economic success of such investments or actions.

7. Jurisdiction

The court of jurisdiction is Bonn. German law will be applied in all legal proceedings.

8. Severability Clause

Should any of these terms and conditions, either in full or in part, be invalid or incomplete, it shall not affect the validity of the other terms and conditions. In that case, the terms and conditions, as stated in German law come into effect.

As of October 2017

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