

Energy storage investment Italy

PNIEC envisages the 2030 energy storage scenario to consist of 8 GW of hydroelectric pumping systems (most of which are already in place), 4GW of distributed energy storage systems (i.e. smaller scale storage systems integrated with residential, mostly photovoltaic plants - many of these distributed energy storage systems are also already in place) and 11GW of stand-alone utility scale storage facilities (which need to be developed). Therefore, battery energy storage systems (BESS) are needed in Italy.

The main configuration used is "DC generation side," covering 88% of the total, while "AC generation side" and "post generation side" cover 5% and 8%, respectively. 99.9% of the systems are combined with a photovoltaic plant, which in nearly all cases (99.6%) is residential scale. Lombardy is the region with the largest number of installed systems (62,222, totaling 448 MW and 753 MWh capacity), followed by Veneto (44,661, totaling 330 MW and 608 MWh capacity) and Emilia-Romagna (31,382, totaling 240 MW and 379 MWh capacity).

The utility scale sector instead is still in its infancy and suffers from regulatory uncertainties, supply difficulties and increasing costs. However, strong growth is forecasted in the next few years due to Italy's ambitious PNIEC goals. Growth expectations are confirmed by 2022 and early 2023 data, which indicate numerous and increasing requests for connections of utility scale energy storage systems to the national electrical network, almost doubling in just 6 months.

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Italy is forecast to deploy more storage capacity than any other European nation in 2024; the European Commission has approved EUR17.7bn of storage funding under "state aid" rules, while the MACSE storage procurement mechanism is expected to be the catalyst for a storage surge in 2025

Italy is arguably the most vibrant European energy storage market at present. It is forecast that Italy will deploy more energy storage capacity than any other European nation in 2024, reaching a total of 7.7GWh, which will equate to more than a third of the total storage capacity deployed in Europe this year (see chart below).

Indeed, the Italian storage market has been a hive of activity in the last year. In one of the most recent developments, it was announced last week that BW ESS and ACL Energy have expanded their joint project development pipeline for standalone, utility-scale battery energy storage systems (BESS) in Italy to 2.9GW,

with a total of 14 projects to be developed across Italy's North and South electricity zones.

Meanwhile, earlier this month solar project developer Emeren Group entered into a co-development agreement with Arpinge, a capital provider focused on sustainable infrastructure in Italy, to jointly develop a 300 MW battery energy storage system (BESS) portfolio in southern Italy.

Italy is a country that has decided to go big on energy storage and the government will provide significant financial support to aid its deployment. In January this year, it was announced that the European Commission had approved - under EU State aid rules - a EUR17.7 billion Italian scheme to support the construction and operation of a centralised electricity storage system. The scheme - which will support the construction of electricity storage facilities with a joint capacity of more than 9 GW / 71 GWh - will run until 31 December 2033.

Speaking at the recent Aurora Battery Conference 2024 in London, Aurora senior associate Maddalena Cerreto said the Italian policy environment is "particularly favourable for battery investment" (see chart below). Cerreto added that "favourable merchant economics" made Italy the "most attractive market in Southern Europe for battery energy storage."

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