

# Italian Battery Storage Market Overview, Challenges & Opportunities

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Research

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# Company & Speaker - Introduction

- PV Tech, Solar Media & Informa
- Solar Media Market Research has been tracking and monitoring renewable projects for 10 years.
- Solar Media has been part of Informa Markets since 2024, a division within Informa PLC
- Informa PLC is an events, digital services & academic research group, LON:INF, FTSE 100, market cap. ca. \$14B\*

## Josh Cornes

- Market Research Analyst, Solar Media
- Joined Solar Media in 2023, as a market research analyst specialising in Solar & Battery Storage project tracking.

\* As of 17 Jun. 2025

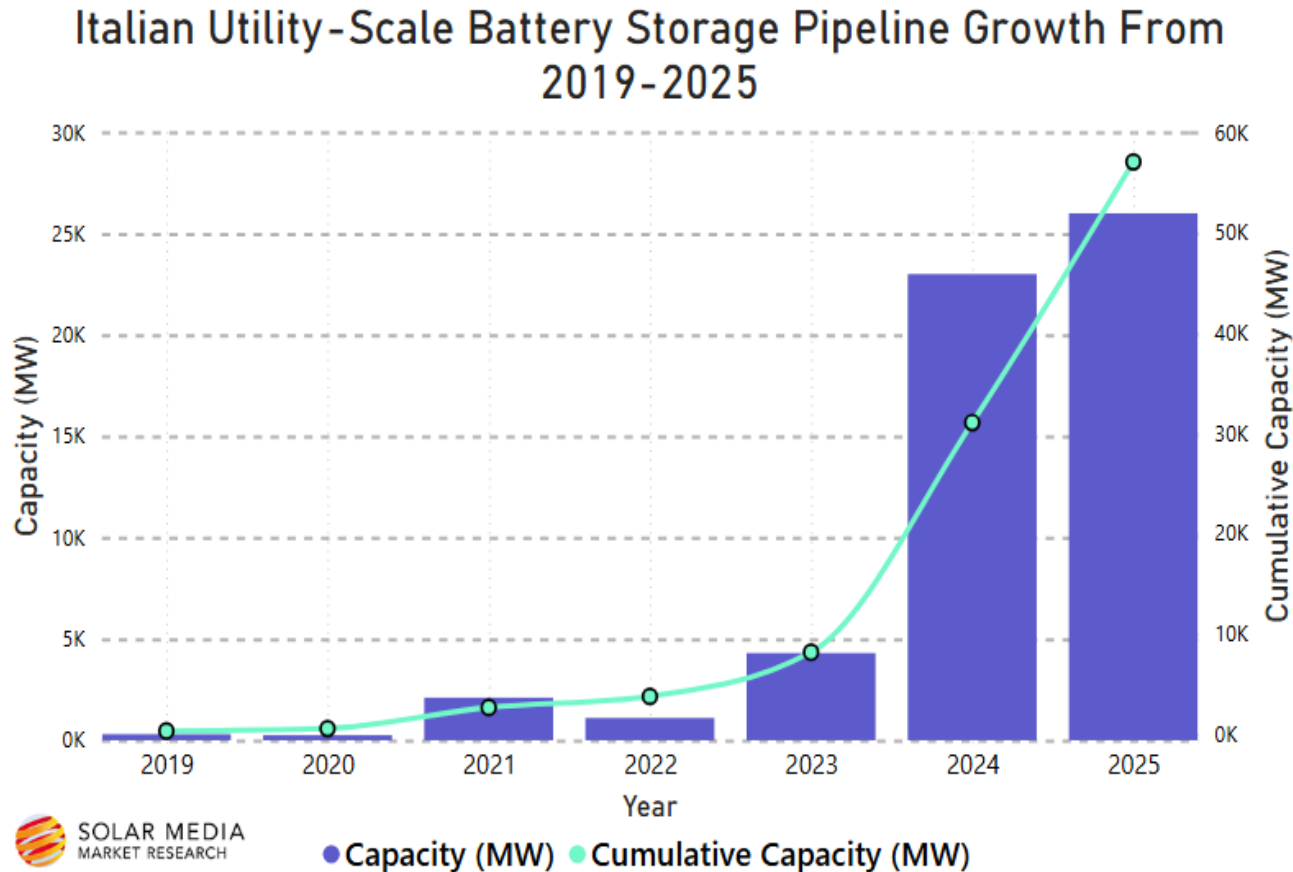
# Data Sourcing

- The data has been taken from the new Solar Media's Battery Storage – Italy Pipeline & Completed Assets Database & other proprietary research.

# Contents

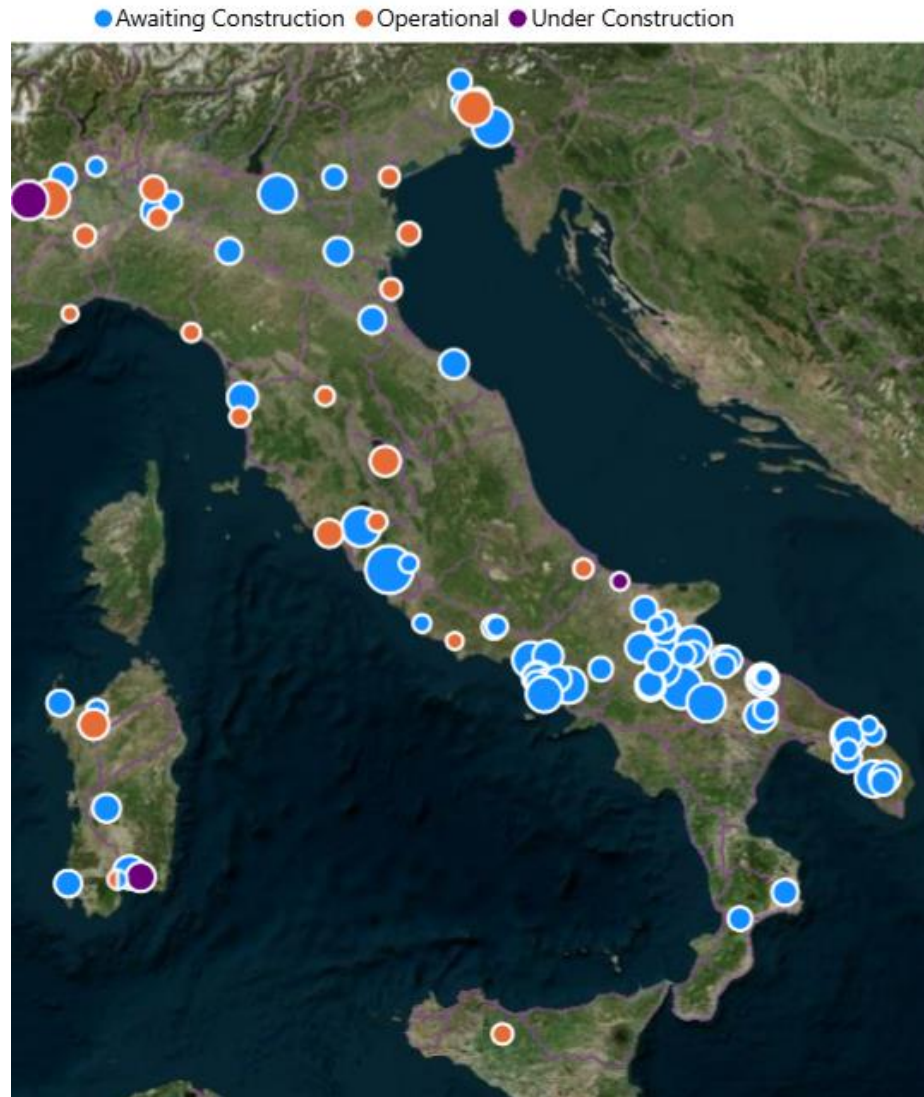
- Market Overview
  - History Of The Italian Market
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# History & Pipeline Of The Italian Market



- The market started back in 2019 with a humble 250MW submitted.
- There has been rapid growth over the last 2 years, with over 23GW submitted in 2024
- Q1 & Q4 are the most active quarters for submissions.
- Almost 4GWh is now operational, with a further 2.4GWh under construction.

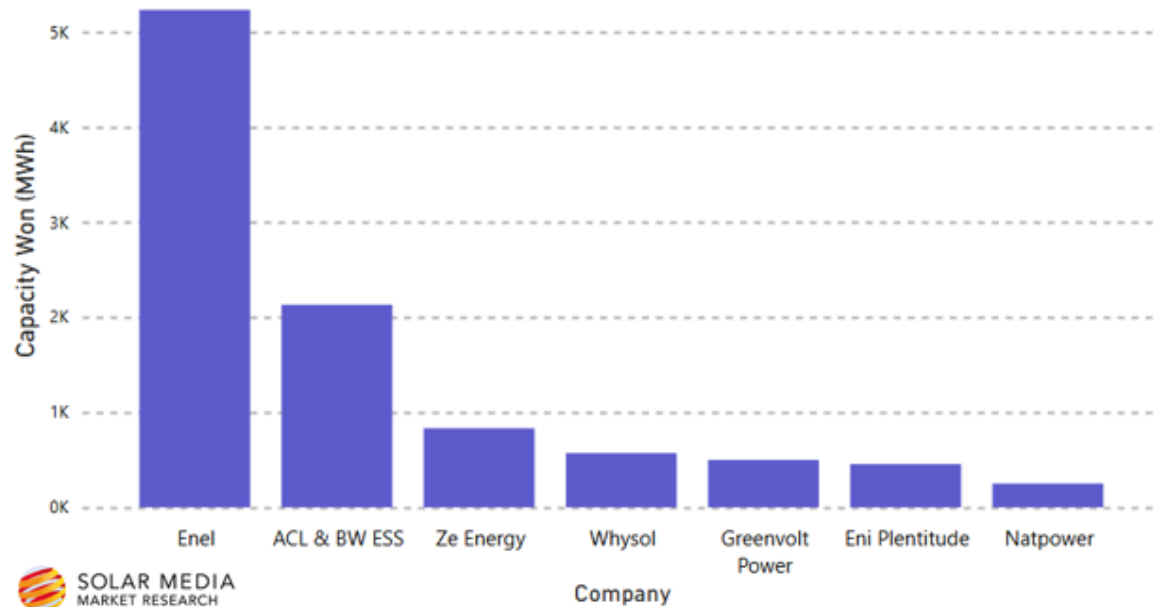
# Necessity & Demand



- Southern Italy and west Sardinia are the most active areas for BESS development.
- Puglia has the highest renewable generation to demand ratio of any other region.
- Northern Italy's strong demand and relatively low generation capacity makes it require power imported from the rest of the country.

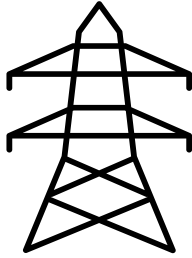
# Funding & Backing

Capacity Won (MWh) by Company

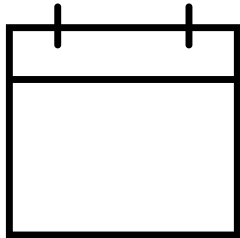


- New MACSE results were widely spoken about around Europe, 10GWh originally awarded across 7 developers.
- Almost 50 developers submitted bids, covering close to 110 projects.
- Over 2GW have received Capacity Market contracts.
- Half of this CM capacity is in the north of Italy.

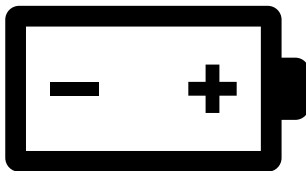
# Challenges & Bottlenecks



- Grid restrictions: The south has more generation than the transmission network can handle, causing congestion and limiting power flows to the north.



- Although MASE have a good track record for approvals, local opposition has caused developers planning issues and longer wait times.



- Battery Storage Systems: Global shift toward longer duration storage has created more competition.



# Conclusion

- The Italian Battery Storage market is exciting around Europe with over 100 developers having now entered.
- Due to the lower demand and higher generation, there is a huge number of projects in the south, specifically Puglia to help with curtailment issues currently occurring.
- This generation is then planned to be transmitted to more densely populated areas such as Lombardy to help with electricity demand and smooth power supply.
- There is generally good backing from the Government with MASE approving projects consistently.
- MACSE results caused a stir and received generally positive feedback, however more backing is required to continue to move in the right direction.

# Thank you

For more information on the database contact

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