

Rome residential energy storage

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LONDON (ICIS)–Market actors predict growth in the Italian energy storage sector will be driven by the system balancing needs of the grid operator in the face of increasing renewable penetration and conventional plant closures.

Italian transmission system operator (TSO) Terna said that 1GW of storage linked to solar farms will be needed by 2025 to help maintain system adequacy, with additional 6GW of utility-scale storage needed by 2030.

The majority of revenue for storage assets comes from participation in Terna's fast reserve scheme. The fast reserve pilot project opened in December 2020 seeing strong competition, with operators offering a total of 1.3GW – six times the initial capacity request of 250MW.

Fluence growth and market development director for EMEA Julian Jansen told ICIS the Italian fast reserve tenders represent a strong revenue opportunity for building initial momentum and investor confidence in the energy storage sector.

Jansen said that Italy's planning and permitting hurdles could limit growth when compared to the speed of deployment seen in the British market, which has turned into the most mature European market for battery-based electricity storage.

He added that there is real concern for storage project approval timelines to enable sufficient deployment and allow for the integration of Terna's renewable capacity goals, adding however that "the government and regulator have rightly identified these challenges and are working to reduce barriers".

Engie Italia communications manager Cinzia Desanctis said that while she expects the energy storage sector to undergo consistent growth, projects are subjected to lengthy delays during the approval phase.

"While the attractiveness of battery storage investments in Italy will be heavily dependant on timely and clear regulation, we expect to see interesting developments in the market thanks to specific revenue streams," she said, referring to Terna's fast reserve scheme, as well as the capacity market.

All of Engie's fast reserve capacity is made up of battery storage, with 6.2MW of these already operational and the remaining 37.8MW that won in the first pilot tender are to enter the construction phase in the first months of next year.



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