

Global PV Storage Insights

Expected ROI of BESS project in Italy 2025



Overview

Is Bess a good investment in northern Italy?

While Northern Italy currently has the largest installed BESS capacity in the country, a build-out of RES in the South is increasing energy price volatility, creating a more compelling investment case for BESS in this region.

How much Bess capacity does Italy have in 2025?

As of March 2025, Italy has got 1GW of grid-scale BESS capacity online, placing the country in third place in Europe (shared with Ireland) in terms of installed capacity, behind Germany (1.6GW) and the UK (5.6GW). Another 1.75GW is under construction, projects totaling 230MW have obtained permits, and 1.2GW of new BESS capacity has been announced.

What is the business case for Bess in Italy?

Revenue Streams for BESS: The business case for BESS in Italy is underpinned by four main revenue streams: wholesale trading, the Ancillary Services Market (MSD), the Capacity Market (MC), and the new energy storage subsidy scheme (MACSE).

How is the Italian government aiming for 15GW of Bess capacity?

The Italian government is aiming for 15GW of BESS capacity by 2030 to maintain security of supply. The Italian government, regulator, and Transmission Service Operator (TSO) are creating an attractive regulatory environment for BESS by offering multiple incentive schemes and updating the grid code.

How big is Bess in Italy?

BESS capacity development Total BESS installations in Italy now exceed 6 GW / 14 GWh, but this is mostly behind-the-meter storage co-located with rooftop solar in the North zone. Terna's plans aim for over 70 GWh by 2030 to achieve Italy's NECP RES targets — a fivefold energy capacity increase (Chart 2).

Why is Terna launching a Bess project in 2025?

To attract more BESS capacity, the Italian regulator and Transmission Service Operator (TSO), Terna, are offering contracted revenue streams for BESS projects. As of early 2025, this has resulted in two waves of BESS projects coming online.

Expected ROI of BESS project in Italy 2025



The rise of bankable BESS projects in Europe

As the renewable energy sector rapidly evolves, battery energy storage systems (BESS) are emerging as a critical pillar for decarbonization. However, with capital constraints and rising market

Italian BESS investment to surge in 2025

We set out & discuss analysis of value drivers & risks for battery investors in Italy as well as looking at MACSE & Capacity Market bidding strategies.



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Cycle Life:≥6000	
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Italian 2027 Capacity Market Auction: MACSE's impact & the BESS ...

On 26 th February 2025, Terna held Italy's Capacity Market (CM) auction for the 2027 delivery year, assigning 38 GW of derated capacity (CDP) in 1-year contracts and almost ...

Italy's MACSE auction will reshape the Italian storage ...

First up is the lithium-ion battery energy storage systems (BESS) phase, launching in early 2025, with pumped hydro energy storage (PHES)

projects following in a subsequent phase. The stakes are high - it's ...



[BESS in Germany 2025 and Beyond:](#)

Energy storage is vital for integrating renewable energy, ensuring reliability of power supply, and reducing greenhouse gas emissions. BESS stands out for its affordability, driven by ...

Italy to hold first energy storage capacity auctions in ...

A 9.3MWh BESS in Italy recently commissioned by the development arm of solar and BESS firm Trina. Much larger projects are expected to come online in the next few years, driven by MACSE. Image: Trina ...



Understanding the Return of Investment (ROI) of Energy Storage ...

Several key factors influence the ROI of a BESS. This article explores the various factors influencing the return of investment of BESS.

European Market Outlook for Battery Storage 2025-2029

The European Market Outlook for Battery Storage 2025-2029 analyses the state of battery energy storage systems (BESS) across Europe, based on data up to 2024 and ...

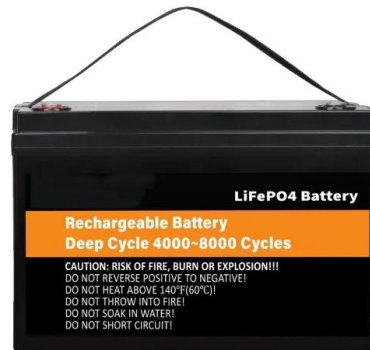


Big opportunities for BESS in 2025

Phase one alone is expected to deliver annual consumer savings of £29-£32 million while continuing to decarbonise the power system. A pivotal year ahead for BESS The Labour Government's ambition to accelerate ...

'Italy is Europe's most interesting battery market'

Italy placed top for its 50 GWh battery capacity target, set for 2030, and because it has already enabled BESS to participate in the market for providing ancillary services to bolster grid stability.



ReFeel New Energy Secures Capacity Market Contract for

...

The project received full authorisation in December 2024 and is entering construction in Q3 2025 with an expected start of commercial operations by Q1 2027. By ...

Italy's 1st MACSE auction: green light for BESS investors

Project authorisation process must be completed by 26 th August 2025: all stand-alone BESS projects authorised by this date will be eligible for 2028 MACSE auction ...

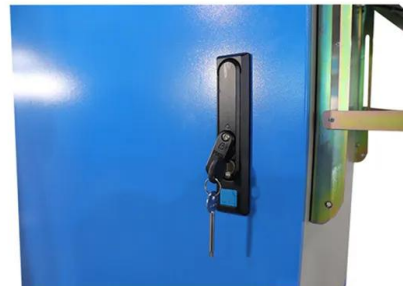


Choosing the Best BESS for Maximum Profitability

A truly profitable BESS investment isn't just about upfront costs-- it's about maximizing revenue, minimizing risk and ensuring long-term financial returns. The right decision-making framework ...

How Italy is Driving BESS Investment

While Northern Italy currently has the largest installed BESS capacity in the country, a build-out of RES in the South is increasing energy price volatility, creating a more compelling investment case for BESS in this region.



Italy approves 648 MW of new battery projects

A decree issued on Aug. 7, 2025, authorized a 120 MW battery energy storage system (BESS) developed by BESS Sessa Aurunca S.r.l. The facility will be built on ...

BESS Pros Survey: What Matters Most to BESS ...

58% of respondents identified system performance and availability as top concerns. This reflects the changing concerns of the sector as it evolves. Despite safety still being a core requirement, ...



Solar and BESS projects in Italy reach ready-to-build

Solar and BESS projects in Italy reach ready-to-build amidst strong demand. Korkia's portfolio in Italy continues to grow and currently totals approximately 1GW, including ...

US deployed 11.9GW of storage in 2024, 18.2GW ...

PV arrays at Gemini Solar + Storage. CATL provided the BESS containers and IHI Terrasun served as system integrator. The project was one of the largest to come online in the US last year. Image: Primergy. BESS ...



Zelestra and BKW Ink Italy's Landmark 2 GWh Tolling Deal

In December 2024 the partners closed a ten-year PPA which enabled the construction of two solar projects, Giosa (Puglia) and Bellomo (Sicily), totalling 16 MWdc. ...

Zelestra and BKW sign innovative long-term tolling agreement ...

The innovative tolling agreement signed between Zelestra and BKW enables the delivery of one of Europe's largest battery energy storage systems (BESS), of up to 2 GWh, in the north ...



BESS in North America_Whitepaper_Final Draft

Total project costs for utility-scale BESS are expected to fall by another 16% between 2021 and 2025. These battery cost reductions will be driven by increasing battery demand from the ...

BESS Report & Data , Elemens , Energy Boutique Consulting

The essential deep dive into the Italian BESS market for taking strategic, development and investment decisions based on data. The report provides the Elemens outlook on auctions and ...



Italy: BESS wins nearly 600MW in 2027 capacity market

A BESS under construction from Enel, which won the lion's of BESS awards in the capacity market in 2021. Image: Enel. BESS technology has won the bulk of new resource ...

2025 Battery Energy Storage Systems (BESS) Market ...

The global Battery Energy Storage Systems (BESS) market is projected to reach approximately USD 22.36 billion in 2025, with a CAGR of 14.2% from 2025 to 2033. In Q1 2025, the market is expected to generate ...



51.2V 300AH

Italian BESS & MACSE state of play

Italy has emerged as one of the most attractive European markets for Battery Energy Storage System (BESS) investment. Much of the attention has centered around the ...

Battery energy storage systems (BESS)

BESS projects can provide a reliable and cost-effective solution, but their full potential remains largely unexplored. To remedy this situation there is a need to focus significant effort on ...



BESS in Italy: Huge growth market faces CE mark ...

On average, the time to complete the entire process takes from six to twelve months." The final considerations emphasize that, despite the need to overcome several obstacles for the installation of an energy storage system, ...

The surge of BESS projects in Europe and the California battery fire

Discover the growth of battery energy storage systems in Europe, the impact of recent fire safety concerns, and the challenges facing BESS developers today.



Energy Storage Systems (ESS) Projects and Tenders

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5 Reasons Why BESS Will Be a Focal Point of Energy ...

The global energy storage market is expected to add over 220 GWh of new capacity in 2025, driven by a rise in tenders for BESS projects, many of which may be commissioned this year. India's BESS market is also ...



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