

## Italy energy storage industry

The energy storage market in Italy doubled in capacity in the first half of the year, though Q2 saw the first slowdown in nine quarters and that could be repeated in H2, according to the country's renewable energy trade body.

As of 30 June, 2023, a total of 3,045MW and 4,893MWh of energy storage is installed in Italy according to ANIE Rinnovabili, the national trade body representing the renewable and clean energy sectors.

Around half of that – 1,468MW/2,058MWh – was deployed in the first half of 2023 alone, meaning the sector doubled in size from the end of 2022 to the end of the first half.

The market continues to be led by the residential and commercial sector with the grid-scale market set to take off in the next few years, but still awaiting final regulations around how energy storage will participate in the electricity market, run by the grid operator Terna.

Three large-scale projects did come online in Italy during the period, totalling around 50MW, including a 15MW project from Eni Plenitude in Sardinia, as well as a 28.8MW one in Umbria and a 7MW project in Lazio, ANIE Rinnovabili said. But, many more are coming, as Energy-Storage.news explored in a special feature for Vol.35 of PV Tech Power, Solar Media's quarterly technical journal for the downstream solar and storage industries.

While the first half was one of growth, the second quarter saw the first sequential fall in deployments in nine quarters. Some 676MW came online in Q2, nearly a 15% fall from Q1's 792MW, which was a record quarter for installations by some distance. The fall in MWh capacity coming online from quarter-to-quarter was greater at 20%, to 914MWh in Q2.

ANIE Rinnovabili attributed both the substantial growth of the first quarter, and the downturn in the second, to the phasing out of the 'superbonus', a tax credit for home energy improvements which covers residential energy storage systems and has fostered the growth in the residential market in Italy, second only to Germany.

The trade body expects the downturn in the residential and commercial segments to continue into the second half of the year too, but said the utility-scale segment could start to make up some of the difference.

'We were expecting a slowdown in residential installations with the end of the superbonus, but our forecasts have been blown away by the unprecedented increase in installs in Q4 2022 extending into 2023. It's not a surprise that this has not been sustained.



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Front of meter batteries will pick up as projects supported by the Capacity Market auction start to come online, with 21 projects delivering 1GW by the end of 2023.

The renewables arm of utility Enel, Enel Green Power, is likely to account for a big chunk of these, announcing earlier this year it was starting construction on 1.6GW of BESS projects.

Trade body Italia Solare has processed data from electricity transmission system operator (TSO) Terna which shows standalone storage is the biggest new market development.

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