



**ITALIA<sup>®</sup>  
SOLARE**

Il fotovoltaico è di tutti

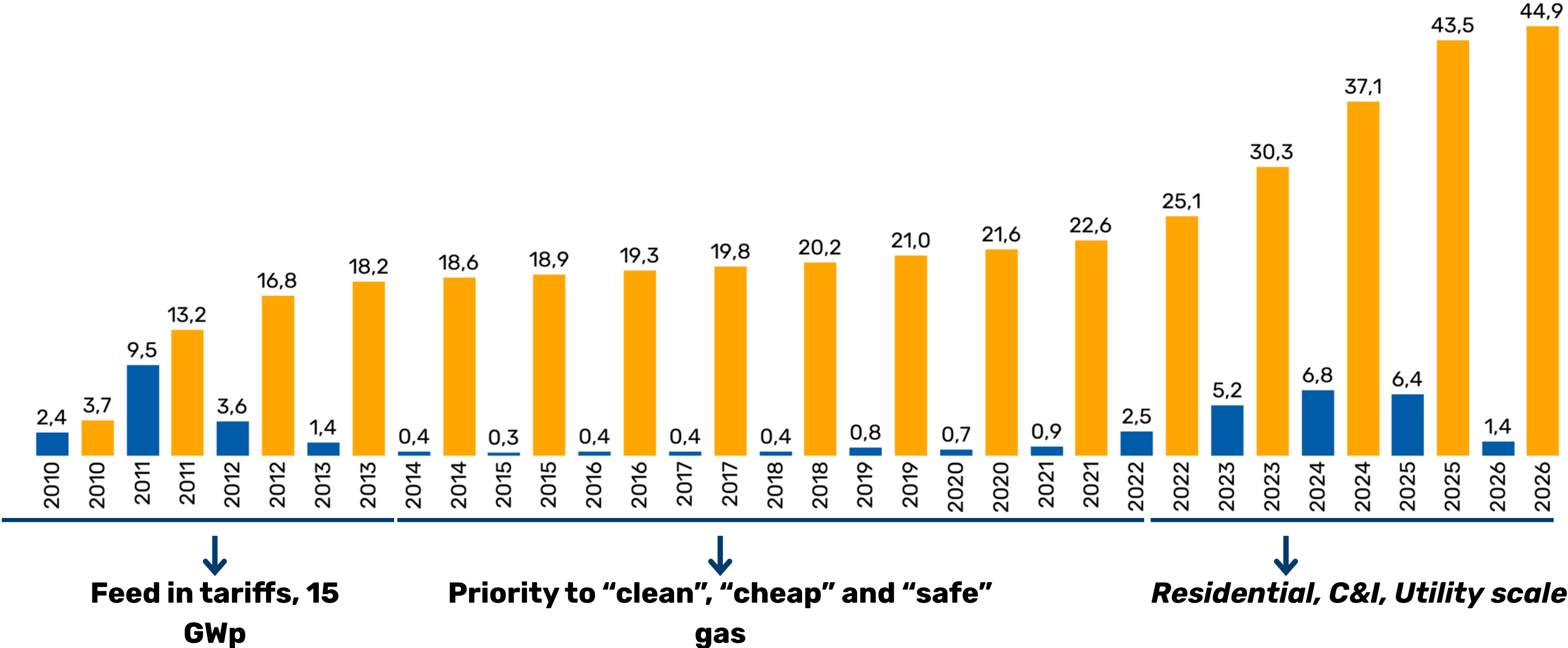
# How EU Solar Markets Took Different Paths - and What We Can Learn

*Focus on Italy*

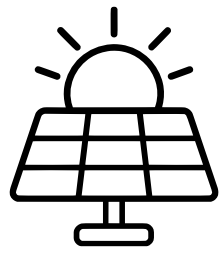
*Paolo Rocco Viscontini  
President ITALIA SOLARE*

05 May, 2026

# Where are we at?



Data source: Terna, updated as of 31 March 2026



## Connected power per power class

Power class

6kW-20kW

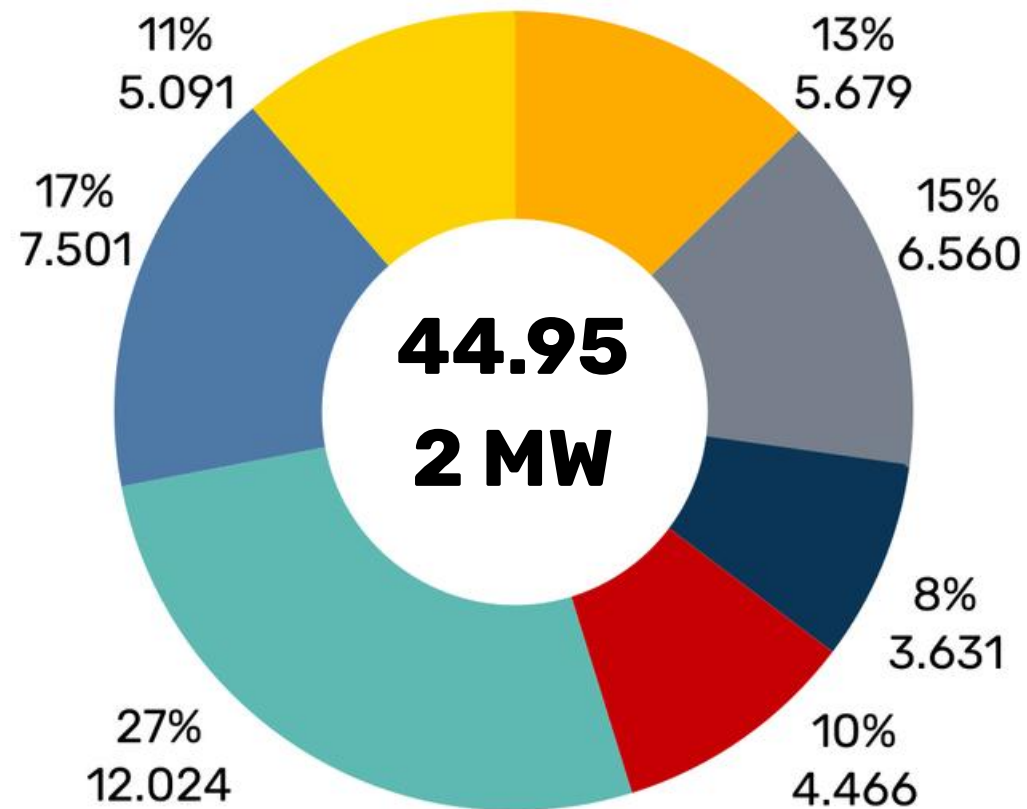
20kW-90kW

90kW-200kW

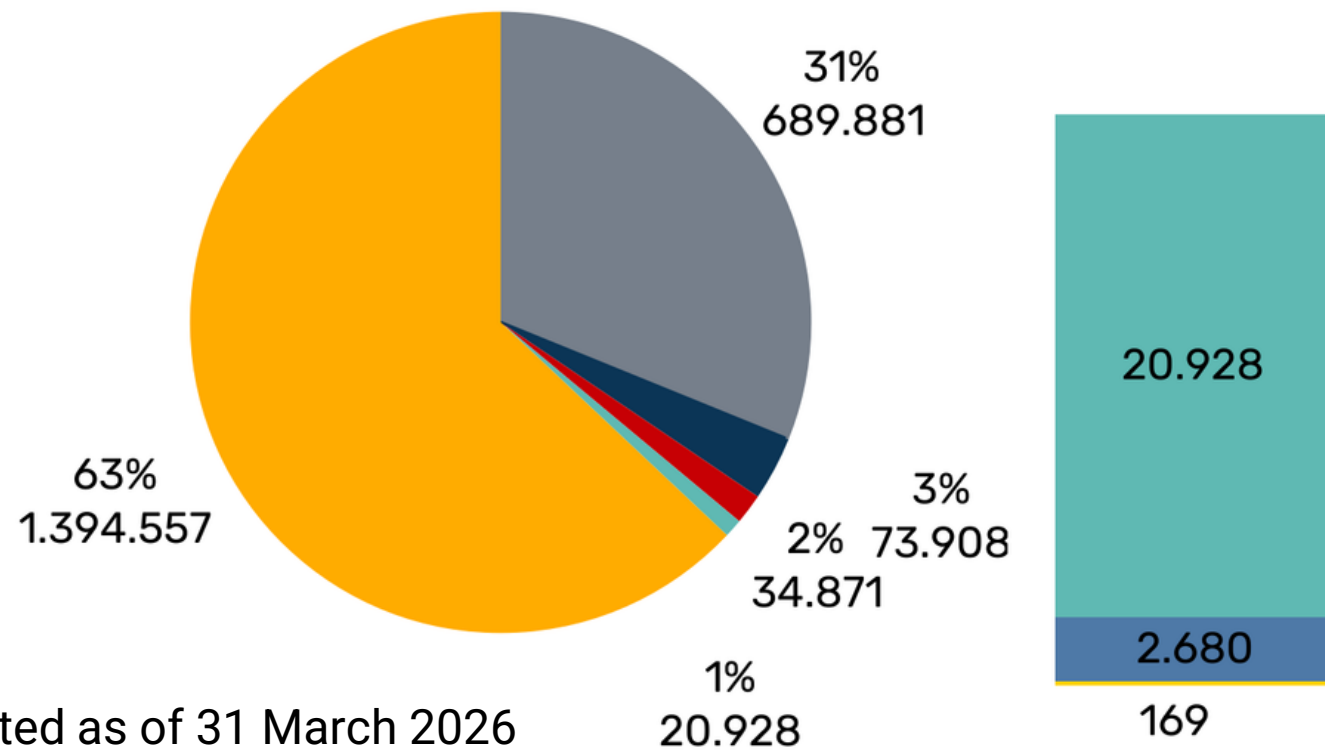
200kW-1MW

1MW-10MW

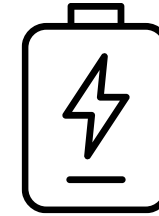
>10MW



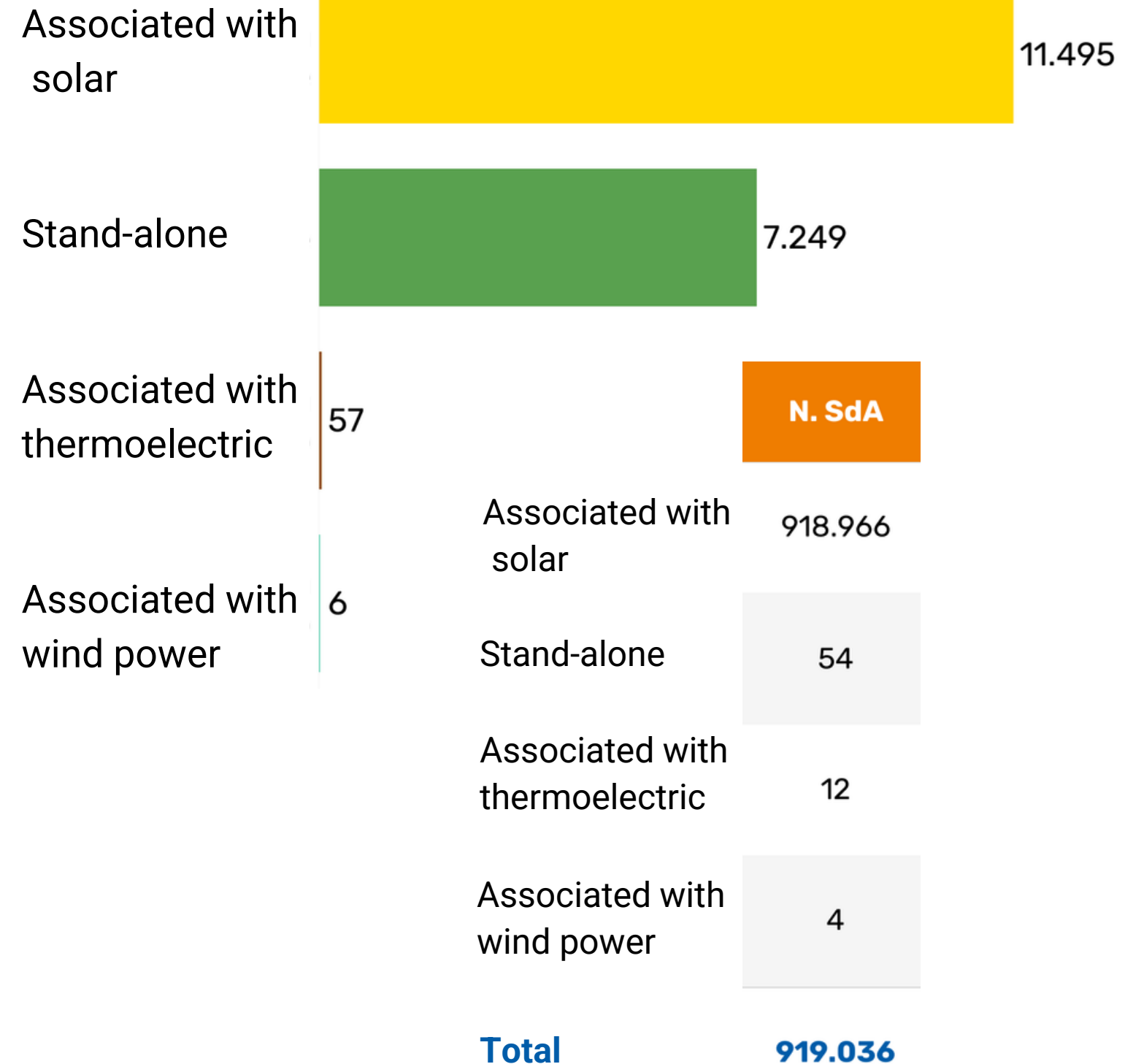
N° of plants per power class: 2.216.994



Data source: Terna, updated as of 31 March 2026



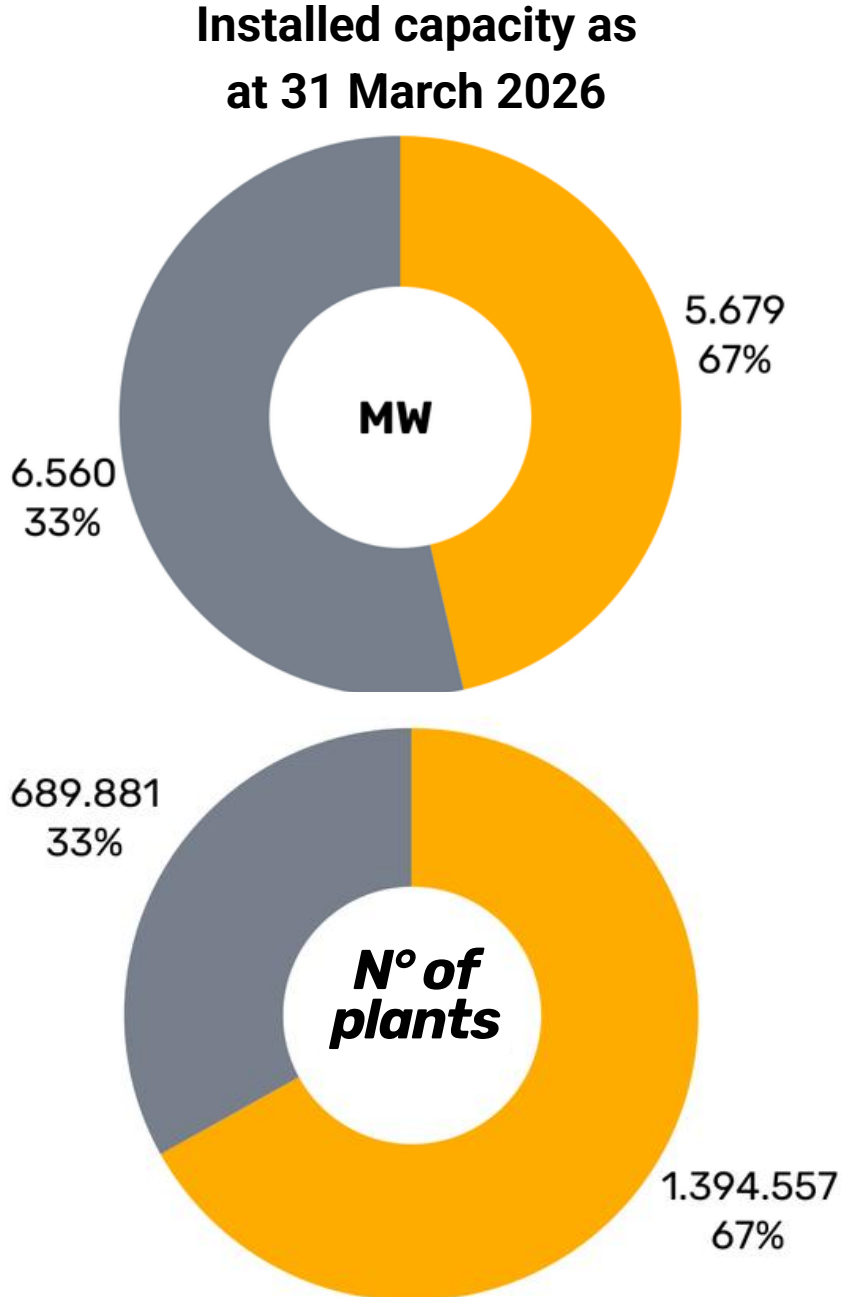
## Capacity by type of associated system (MWh)



# MAIN MARKET DRIVERS | Residential + C&I

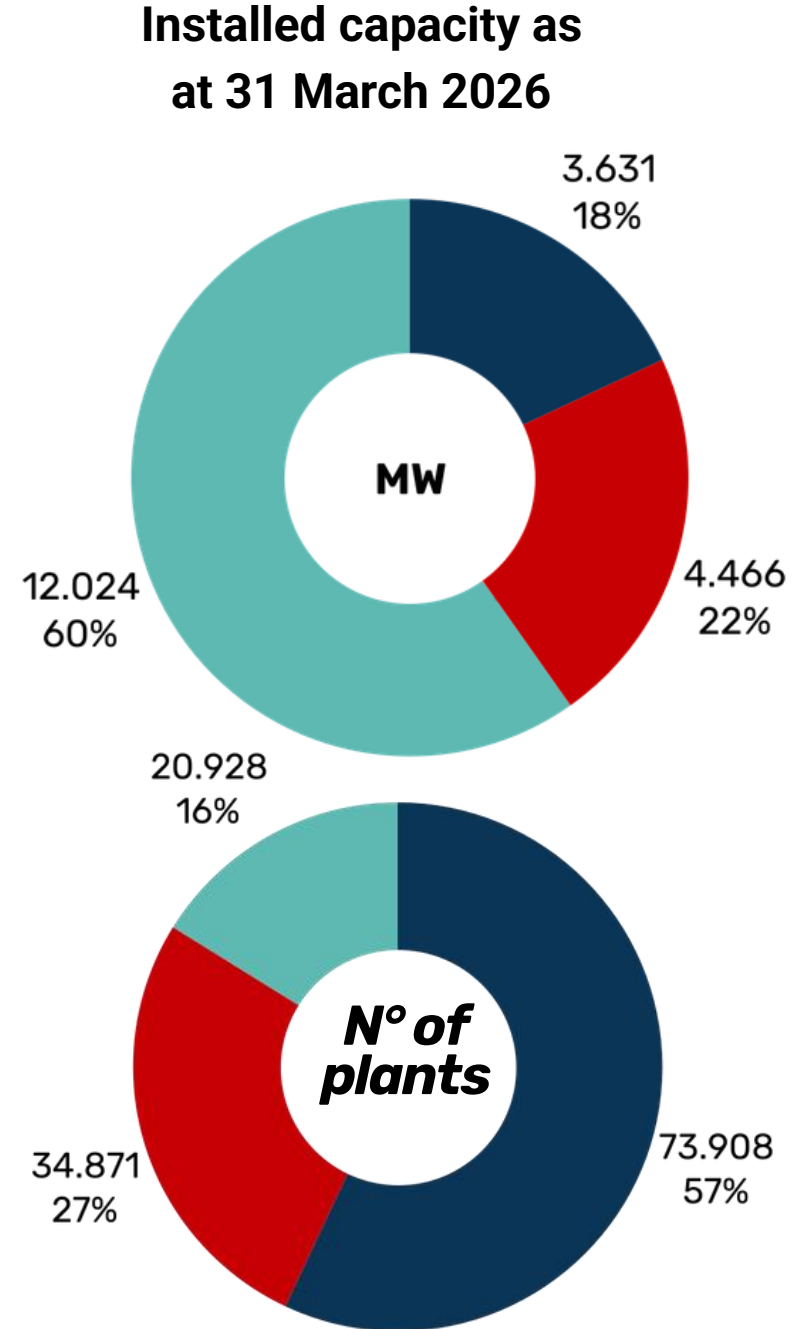
## Residential

- PV + Storage is now the standard PV system
- 50% tax deduction in 10 years (renewable every year)



## C&I

- New fire brigade guidelines: less power/sq m + strict fire tests of photovoltaic module together with roof covering
- Hyper-depreciation of 180% of the cost, but only with made in EU cells and modules



# MAIN MARKET DRIVERS | Utility scale

## Suitable areas for ground-mounted plants under preparation in all regions:

- deadline: end of June
- only agrivoltaic plants possible in the agricultural land
- standard ground mounted pv plants only in the industrial lands and in the agricultural lands 350 m close to industrial areas and highway (“Solar Belt”)

## Next installations

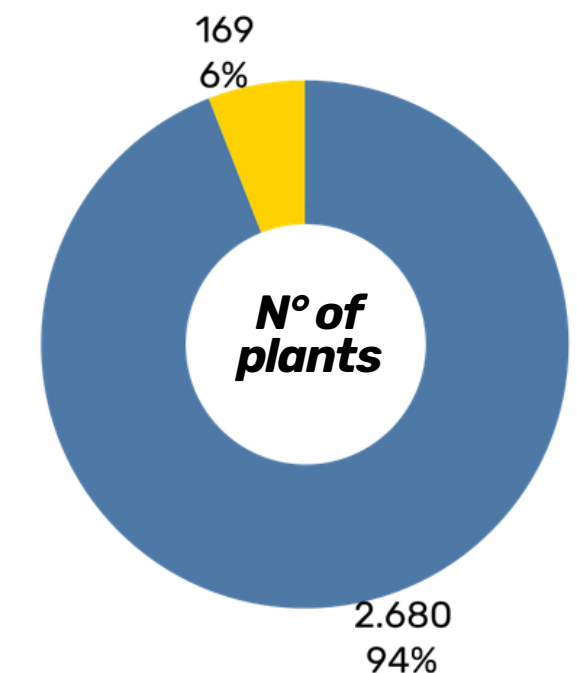
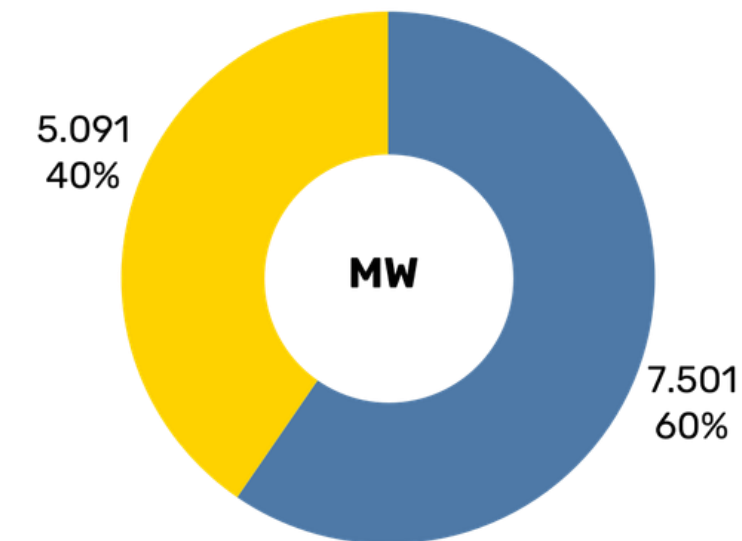
Already assigned, to be installed in the next 2 years:

- **10 GW** (of which 1,2 GW NZIA) to be installed thanks to the FER X (CfD for 20 years) Transitional Decree of end of last year
- **1,1 GW** of agrivoltaic plants (40% subsidized thanks to PNRR)
- **1 GW** of highly subsidized small scale PV plants for farmers

To be assigned and installed in 2027-2029:

- About **20 GW** (of which 7 GW NZIA/IAA) New FER X Decree under preparation

Installed capacity as at 31 March 2026



1MW-10MW

>10MW

# MAIN MARKET DRIVERS | Large BESS stations

## Capacity Market

*Terna tenders, not specifically for electrochemical storage*

- 5-10 GWh already assigned
- X GWh to be assigned (not quantified yet)

## MACSE

*Terna tenders, only for electrochemical storage*

- 10 GWh already assigned end of last year
- 16 GWh to be assigned in the next tender (by end of the year)
- 32 GWh to be assigned in subsequent tenders

# PV opportunities

## Transition from PUN (National Unique Price) to PZ (Zonal Price)

To better connect cheaper renewable energy to users.

## Flexibility

ARERA must finalise rules enabling demand response and real-time control of distributed renewables—especially PV—to support balancing and dispatch alongside storage.

## FER Z

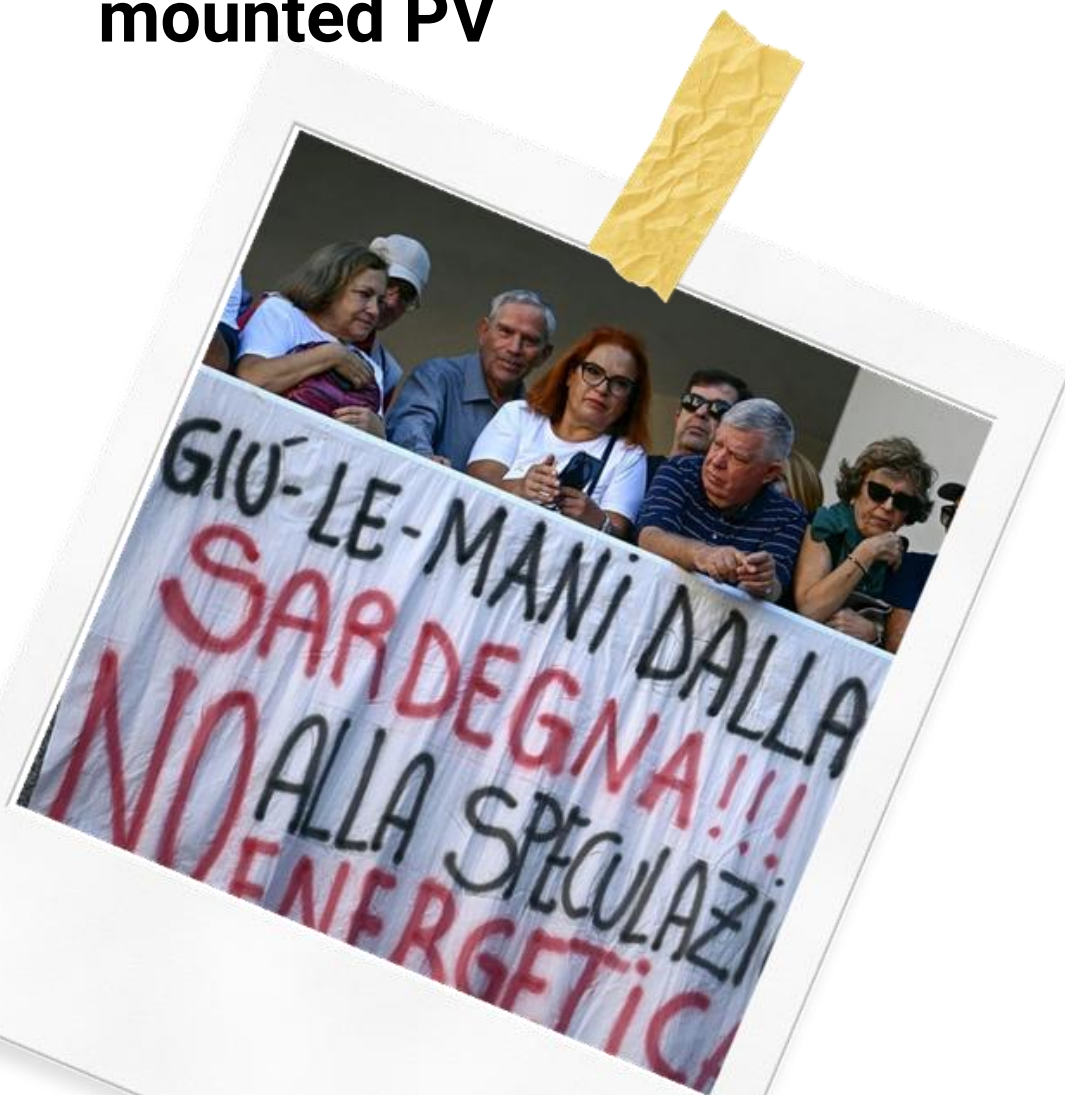
Long-term CfD auctions shifting support from individual plants to integrated renewable portfolios combining generation and flexibility.



# Challenges

1

## Acceptability of ground-mounted PV



2

## Network infrastructure



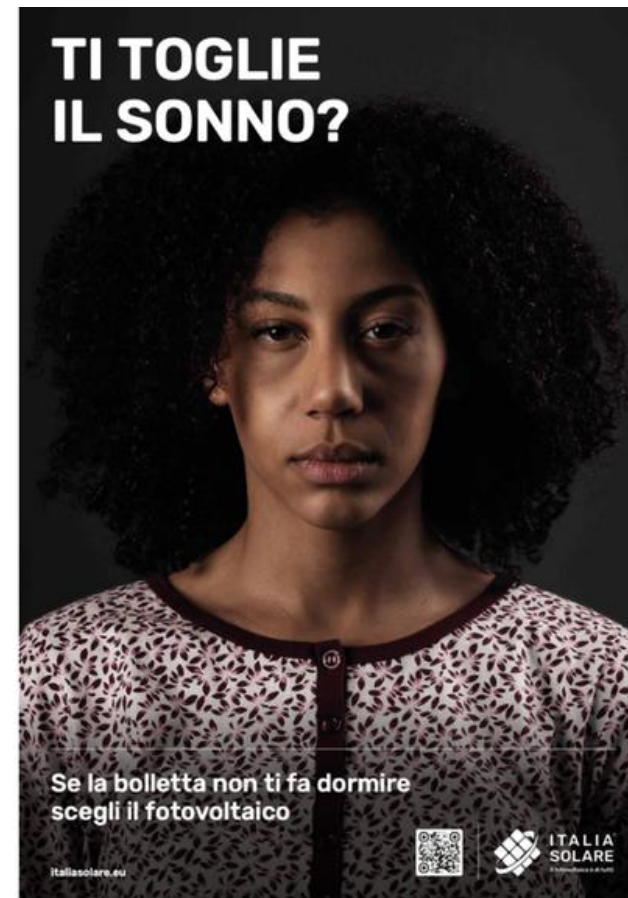
**Present problem** → Virtual saturation

- 322 GW of renewable sources connection request: 144 GW of PV, 55 GW of which “serious”
- 303 GW of storage connection requests, 272 GW of which stand alone, 59 GW of which “serious”

### Solutions

- New rules to “conquer” a connection point under preparation
- Only authorized plants will get a definitive connection

# Communication Campaign



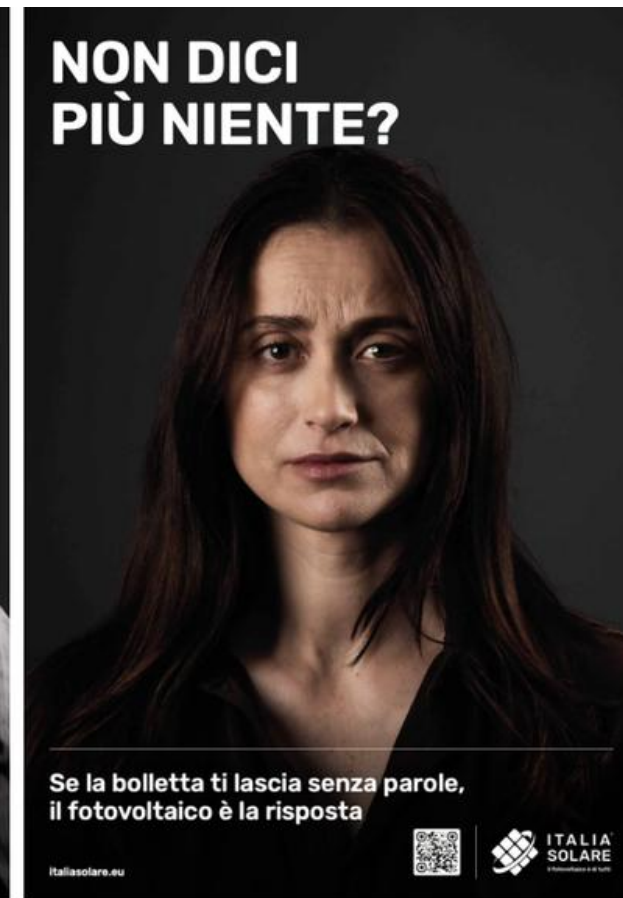
**IS IT KEEPING YOU UP AT NIGHT?**

**If your energy bill keeps you awake, choose solar power**



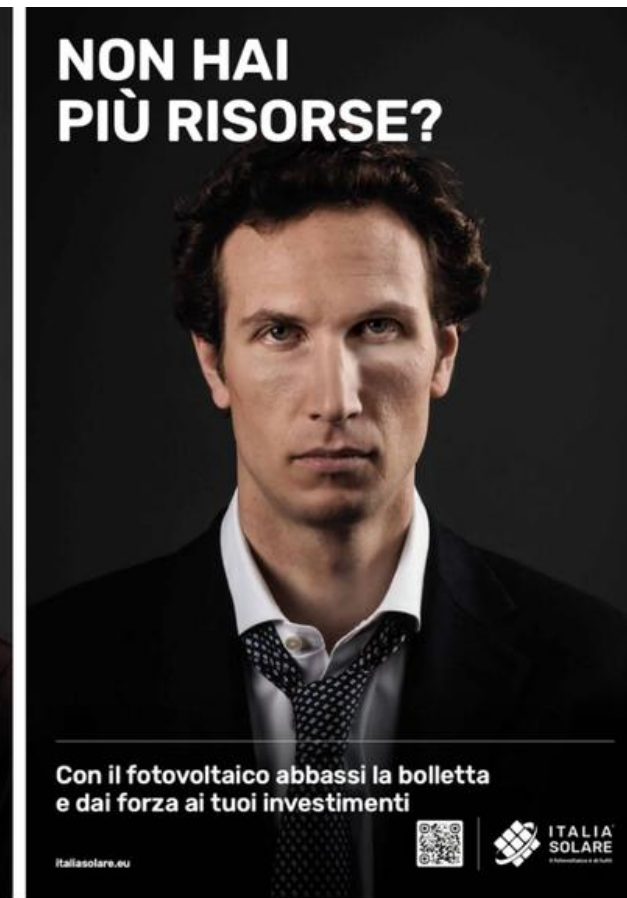
**DO YOU FEEL TRAPPED?**

**Break free from fossil fuels, choose solar power**



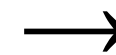
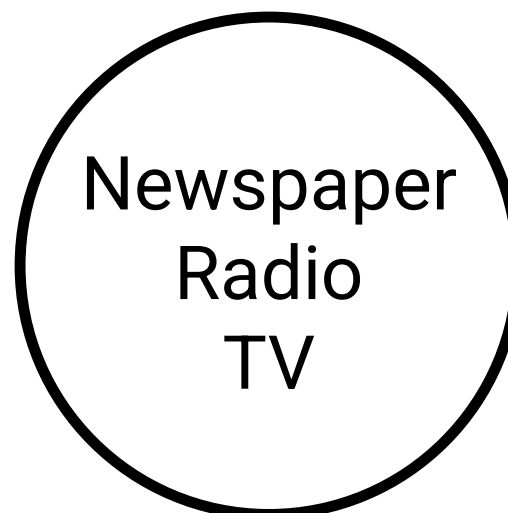
**LOST FOR WORDS?**

**If your energy bill leaves you speechless, solar is the answer**



**RUNNING OUT OF RESOURCES?**

**With solar power, you lower your energy bills and strengthen your investments**



**n. of contacts:  
95.222.000**





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***ITALIA SOLARE***

***Via Passerini 2, 20900 Monza (MB) – Italy***

***www.italiasolare.eu***

***info@italiasolare.eu***

