1,000 MW Utility-Scale Battery Storage BESS

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GROSS REVENUE
$0

EBITDA
$0

BUSINESS TYPE
Renewable Energy

COUNTRY
Romania

BUSINESS ID
L#20261118

1,000 MW Utility-Scale Battery Storage BESS

An opportunity to acquire or invest in a high-capacity, grid-connected Battery Energy Storage System (BESS) portfolio in South-Eastern Europe. The pipeline comprises 4 Special Purpose Vehicles (SPVs) covering 5 distinct utility-scale projects with a combined target capacity of 504 MW installed power and 1,010 MWh storage capacity.

Strategically positioned across three key energy regions, the portfolio captures structural market inefficiencies driven by high Day-Ahead Market (DAM) price spreads and growing renewable integration needs.

Key Portfolio Highlights

- **Scale & Capacity:** 504 MW installed power / 1,010 MWh storage capacity distributed across 651 storage units.
- **De-Risked Status:** All 5 projects are **Ready-to-Build (RTB)** with signed Grid Connection Technical Approvals (ATR) and approved connection studies.
- **Grid Connectivity:** Direct connections secured across 2 Transmission System Operator (TSO) nodes—including a direct 400 kV high-voltage connection—and 2 Distribution System Operator (DSO) nodes.
- **Site Control:** Right-of-superficies and urban planning certificates secured; financial guarantees posted to network operators.

Market & Revenue Opportunities

1. **Energy Market Arbitrage:** Capitalizing on regional energy market volatility and substantial daily price spreads (average daily peak/off-peak spread reaching ~€168/MWh).
2. **Ancillary & Balancing Services:** Sub-second response capability tailored for national grid frequency regulation and balancing reserve contracts with the TSO.
3. **Regulatory Tailwinds:** Supported by an EU-approved national BESS funding framework (€150M scheme) and national storage buildout targets of 1,200 MW by 2030.

Projected Financial Summary (Base Case)

- **Total Estimated Portfolio CAPEX:** ~€247.5 Million

- **Estimated Annual Gross Revenue:** ~€99.6 Million
- **Estimated Annual EBITDA:** ~€76.6 Million (~70% EBITDA Margin)
- **Blended Project IRR (15-Year Nominal):** ~20% – 21%
- **Net Present Value (NPV @ 9% WACC):** ~€140.6 Million (Base Scenario) up to ~€303.2 Million depending on market sizing assumptions
- **Simple Payback Period:** ~4.7 Years

Asset Breakdown

Project SPV	Region / Node	Installed Power	Max Export Capacity	Storage Capacity	Grid Voltage / Operator
Asset 1	Location 1	259 MW	Direct Grid Connection	~750 MWh	High-Voltage TSO/DSO Node
Asset 2	Location 2	67.5 MW	66.2 MW	~135.4 MWh	110 kV – Regional DSO Substation
Asset 3	Location 3	160 MW	55.0 MW	~330.2 MWh	110 kV – National TSO Substation
Asset 4	Location 1	212 MW	202.1 MW	~424.0 MWh	400 kV – Direct National RET Connection
Asset 5	Location 1	64 MW	58.9 MW	~120.3 MWh	110 kV – National TSO Substation

Investment Rationale

- **First-Mover Advantage:** Establishes immediate scale in one of Europe's fastest-growing energy storage markets.
- **High Cash Flow Yield:** Strong top-line revenue potential (€120–€180/kW/year optimized across wholesale and balancing markets).
- **De-Risked Execution:** RTB status reduces development timelines, allowing swift deployment of capital.

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