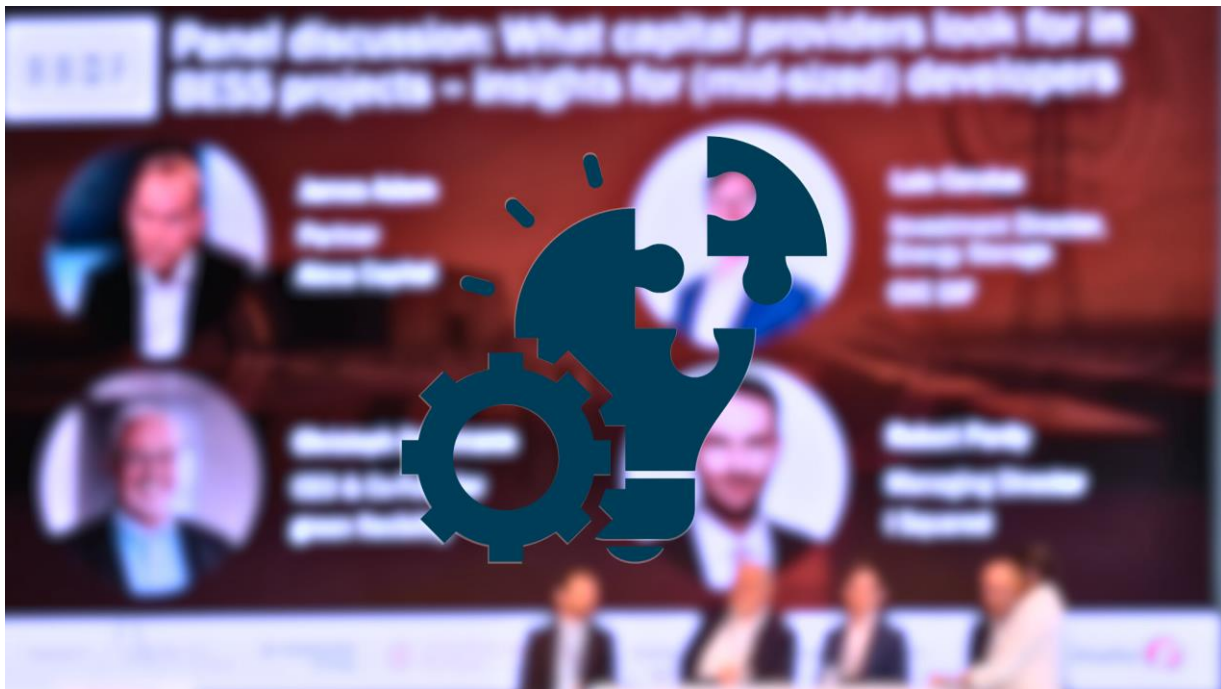


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BESS IN GERMANY:

BETWEEN MARKET MATURITY, GRID TENSIONS & REVENUE ILLUSIONS

The hype around **Battery Energy Storage Systems (BESS)** is unbroken—on panels, in pitch decks, and in PowerPoint slides, the future sounds bright. But anyone looking closely quickly sees: in Germany, there is still a huge gap between ambition and reality. That’s why the **Battery Business & Development Forum (BBDF)** in Frankfurt was so valuable for us—it sharpened our view of market maturity, grid-related conflicts, and the real scope for action.

Three Key Takeaways

1. Internationally Mature Markets – Germany Still in Catch-Up Mode

While other countries have long integrated BESS into their market logic, infrastructure, and regulatory frameworks, we in Germany are still grappling with fundamental questions:

- Who is allowed to connect—and when?
- Which rules actually apply—today, tomorrow, the day after tomorrow?
- How strategic can project development be at this stage?

Our conclusion: Anyone planning in Germany needs not only capital and hardware, but also strategic navigation skills—especially when it comes to market selection, diversification, and **co-location** (developing BESS alongside generation assets). From our perspective, co-location is no longer a “nice-to-have,” but an economic necessity.

2. DSOs vs. Developers – Who Is Actually Talking to Whom?

One term was mentioned more often, and more forcefully, than any other: “bloodbath”. That’s how some industry stakeholders describe the often entrenched situation between distribution system operators (DSOs / Netzbetreiber) and developers—a coexistence rather than cooperation.

What would help?

- Early, structured communication
- Digital tools for processing applications
- Clear prioritization criteria: *First come, first served*—or rather *first ready*?

Because if DSOs are confronted each month with dozens of applications that are neither complete nor robust, there is no progress—only frustration. On both sides.

3. Revenue Potential: Between Reality and Wishful Thinking

As we already hinted in our LinkedIn summary: the currently realistic revenues—around €200–220k per MW per year—depend heavily on market strategy and the quality of the optimizer.

But the gap between marketed expectations and realistic assessments is wide. Many providers communicate (deliberately) optimistically—yet market cycles, price developments, and regulations remain volatile. Without solid models and transparent communication, the result is often misinvestment.

Key principles:

- Quality beats promises.
- Data-driven optimization beats gut feeling.
- Market realism beats marketing.

Our Conclusion: BESS Needs Structure, Not Just Storage

The BBDF was not a showroom—it was a place for clarity. For us, the key messages are:

- Without a strategic approach, project development is hardly plannable.
- Without genuine coordination, grid connection becomes a systemic risk.
- Without sober analysis, revenue potential remains just hope.

We leave with a lot of input—and even more motivation. Because while the challenges are big, they are solvable. Together, realistically, strategically.

Note: *This article reflects our practical experience and is not a substitute for legal advice.*

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