ekovoltis

Polish BESS market – selected determinants of project economics

Berlin, 10 September 2025

ekovoltis

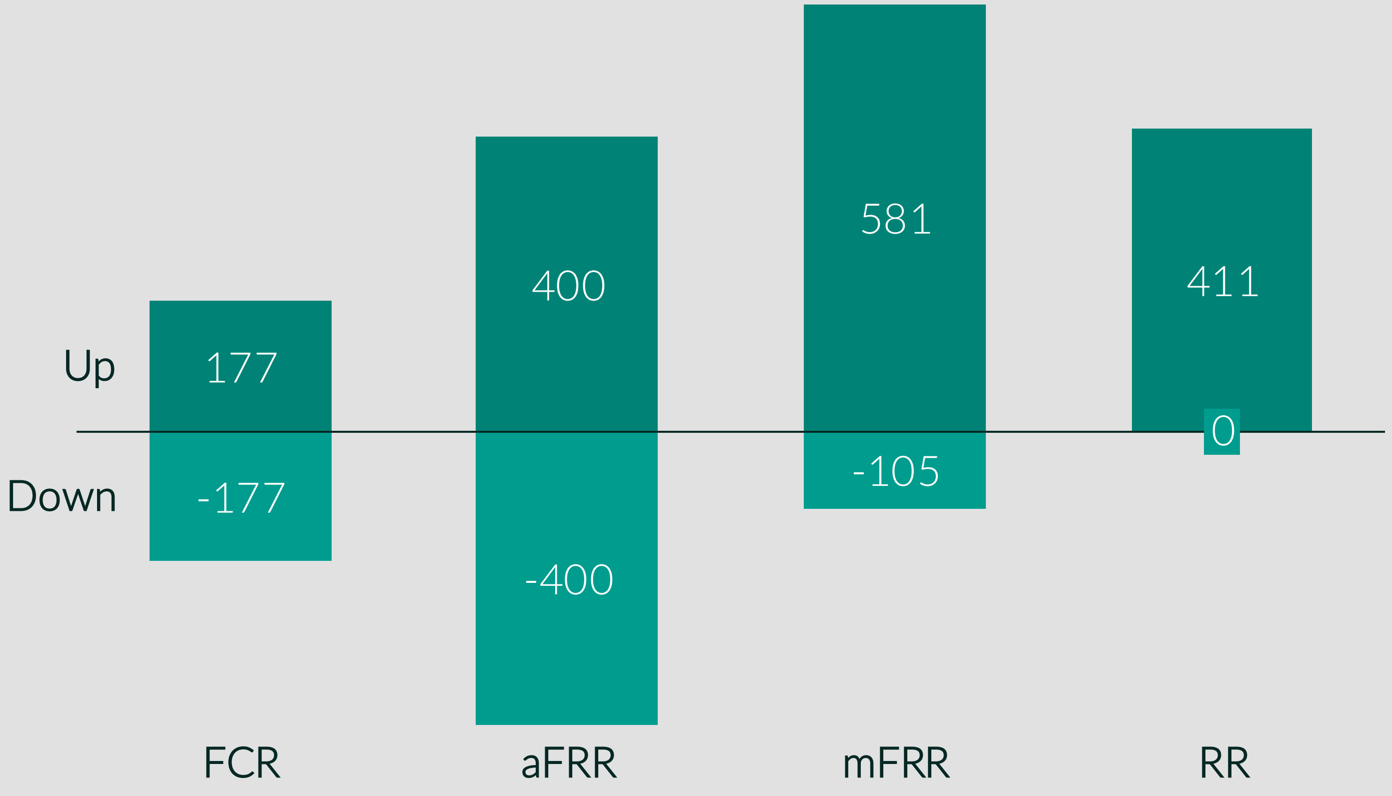
- **Are all the projects created equal?**
  Impact of the size and location on the project revenue potential

- **When will the project start generating revenue?**
  Nuances of the commercial ramp-up timeline

Optimal project size could be estimated at 5-50MW

- Minimum size of **BESS project should be grater than 2MW** as minimal bid for AS is 1MW.
- Practically, **projects should be larger (+5MW)** to allow for flexible cross-market optimization
- Smaller projects could be theoretically aggregated **but pathway to aggregation for AS is not yet clear**, similarly for co-located assets
- **Larger projects (+50MW) are going to relay more on the wholesale market** as TSO would not accept more than few tens of MWs from one provider in one network node

Average volumes of Ancillary Services procured in Poland,
MW per hour; week 34 2025

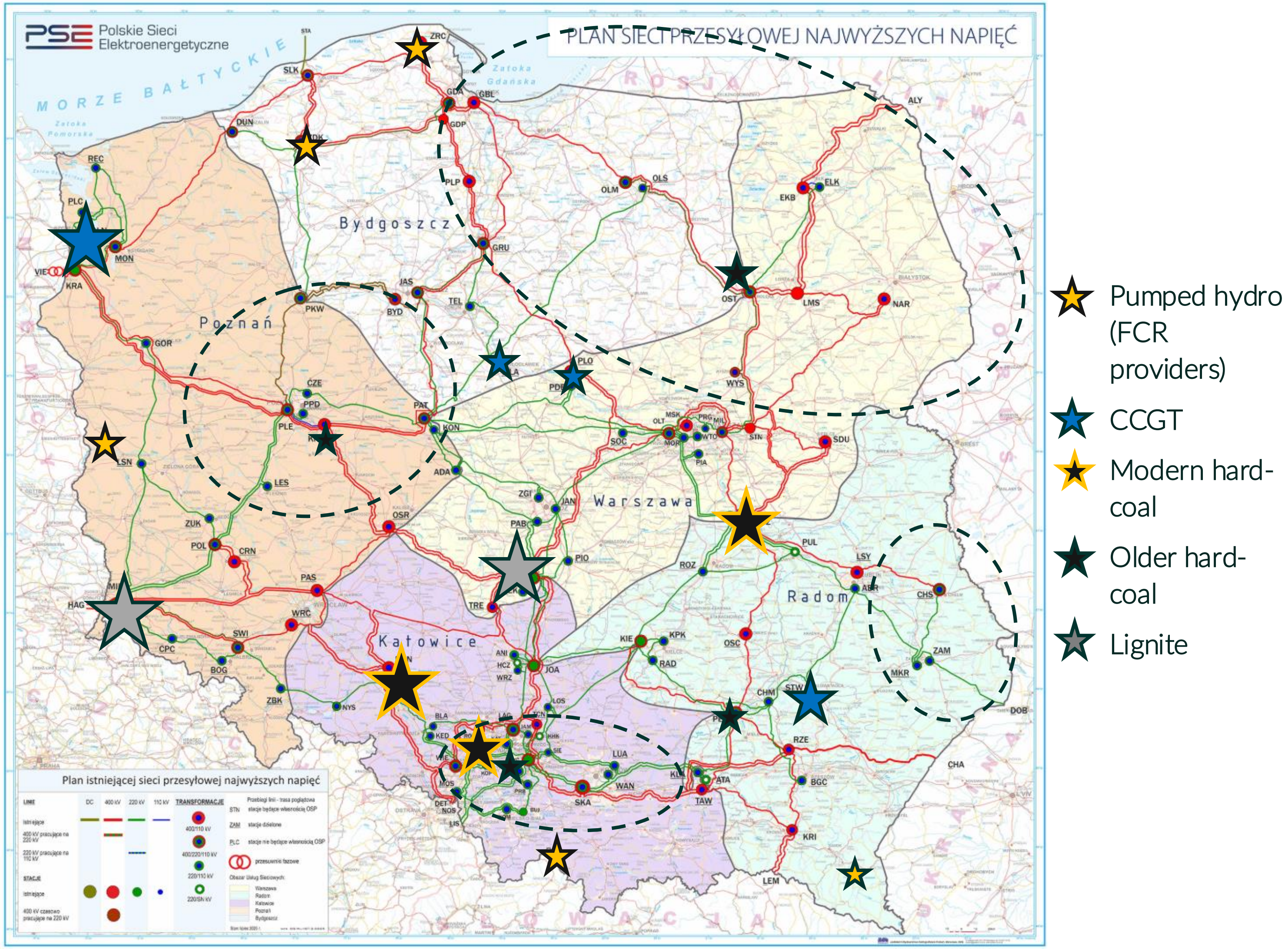


ekovoltis

Location determines competition and activation frequency

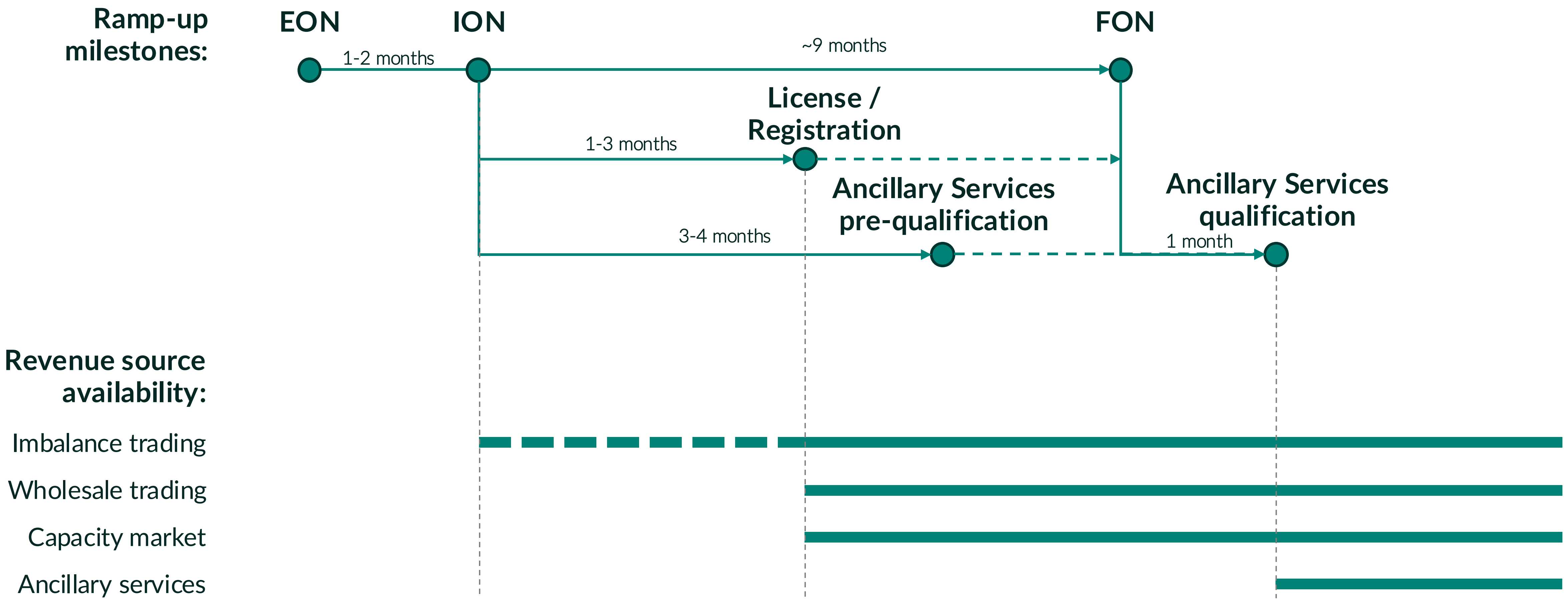
- Selection of the BESS location should be informed by the competition present in the grid node as TSO limits the amount of Ancillary Services procured from one provider at each node!
- Location in the grid also impacts the frequency of activation due to:
  - Local RES generation (offshore wind)
  - Grid constraints (east and north)
  - Trips of nearby conventional units

Key providers of Ancillary Services vs transmission grid density



ekovoltis

BESS should achieve full revenue potential in ~1 year from EON milestone, first revenues are conditionally possible already at ION



Questions regarding BESS in Poland? We are happy to help!

Grzegorz Jagodziński
Business Development Manager
+48 886 548 402 | grzegorz.jagodzinski@ekovoltis.pl

Bartłomiej Kalisiewicz
Executive Board Member
+48 664 908 358 | bartlomiej.kalisiewicz@ekovoltis.pl