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Financing Battery Energy

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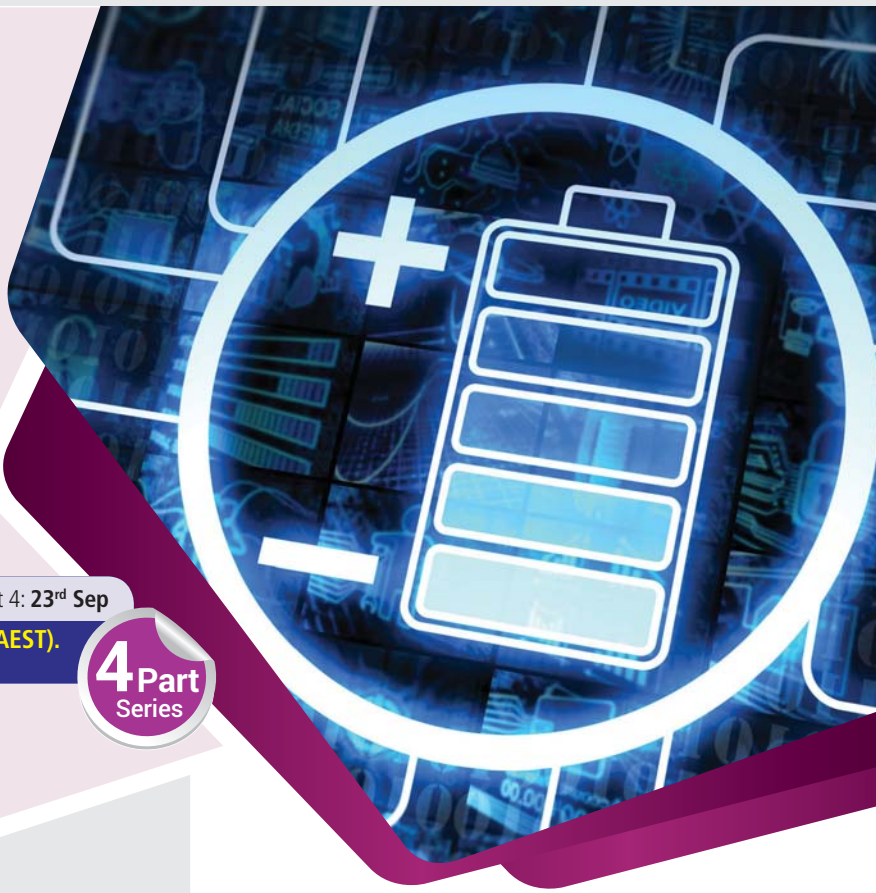

Sep 2022

Part 1: **15th Sep** | Part 2: **16th Sep** | Part 3: **22nd Sep** | Part 4: **23rd Sep**

Course Parts will commence at **13:00** and end at **16:00 (AEST).**
There will be short breaks during each course Part.

4 Part Series

KEY LEARNING OBJECTIVES

- Gain an understanding of battery technology, industry developers and markets.
- Know which institutions are invested in and lending to the energy storage industry.
- Appreciate how battery storage regulations are designed and implemented.
- Compare how commercial electricity markets and publicly owned grids use battery storage.
- Interpret corporate offtake structures and the use of off-grid electricity supply and storage.
- Review opportunities in the developing debt market and established equity electricity storage markets.
- Study the financial structure of battery storage deals.
- Master financial models for battery electricity storage.
- Analyse the trajectory of the battery storage market in Asia-Pacific region.

Our Expert Course Instructor

Julian Roche

Julian Roche began his career with the UK Government as an economic analyst, specialising in foreign trade, energy and economic modelling. He subsequently joined the mainstream Civil Service fast stream, where he specialised in major privatisations and procurement at the time of the development of Public-Private Partnerships. He then returned to economic analysis in the private sector as a divisional forecasting head for what later became Global Insight.

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ABOUT THE COURSE

Electricity markets and power consumers are the same time hungry for renewable energy of all types but also required to ensure stability of supply. But the rapid advances in battery storage technology that are increasingly able to meet these requirements also bring financial challenges in their wake. Whilst making no assumptions as to prior knowledge of either the current state of battery technology or the market, this course provides a comprehensive explanation of how this emerging technology has already as a result produced a range of ground-breaking deals across a wide range of industries.

The course first investigates in detail the scale of this important new market, and the significance of regulation across multiple jurisdictions, and the role of battery storage in the electricity markets for which they are responsible. Delegates will also examine the emergence of off-grid power solutions, the drive to replace poles and wires and the challenges now facing the retail battery storage market.

Delegates then move on to study available investment and debt opportunities from valuation and credit risk perspectives respectively, developing an understanding of the metrics that matter. Next, delegates will evaluate the corporate and project financial structures, utilising both debt and equity, that now underpin individual battery storage deals. This understanding is then succeeded by group work on tailored financial models, from which delegates the relevant assumptions, cashflows, accounts and outputs to analyse the profitability and risks of battery storage deals.

EXPERT COURSE INSTRUCTOR

Julian Roche began his career with the UK Government as an economic analyst, specialising in foreign trade, energy and economic modelling. He subsequently joined the mainstream Civil Service fast stream, where he specialised in major privatisations and procurement at the time of the development of Public-Private Partnerships.

He then returned to economic analysis in the private sector as a divisional forecasting head for what later became Global Insight. After having worked on a range of derivative contracts for in the City of London, in 1991 he set up his own consultancy, where he acted inter alia for a number of years as senior consultant to a venture capital company guiding tech investments, and subsequently advised developers and energy companies on finance and modelling, and UNCTAD, the World Bank and governments on global investments and trade.

He regularly publishes and conducts courses on a range of financial topics including renewable energy, financial modelling, project finance, venture capital, and valuation to international firms, banks, and public sector agencies including central banks and sovereign wealth funds.

Julian holds a first-class degree in Philosophy, Politics and Economics from Oxford University and amongst other higher degrees, a PhD in risk management from Deakin University

WHO WILL BENEFIT

Battery storage provides the essential complement to renewable energy sources in achieving the energy transformation that this decade will bring. The course covers four interlocking industry segments: organisations that require the knowledge, financial expertise and experience to deliver battery storage profitably at a commercial scale, renewable energy developers themselves, companies and communities that will be using local grids and supply, and firms that are engaged in serving the retail battery storage market.

The course is therefore aimed at all of those who need to gain detailed understanding of the financial and economic aspects of battery storage and the market opportunities it offers across industry segments. These include project managers, engineers, technology specialists, developers and industry participants, as well as commercial and investment bankers, investors, accountants, economists, regulators, and those involved with renewable energy in the government sector.

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Course Outline

Modules 1 and 2: The economics of battery use

Battery technology and cost reduction

- Types of battery – advantages and disadvantages
- Market share by developer – Tesla and its competitors

Case Study: *The Taiwan Cement battery factory project*

- Battery uses – standalone, buildings, vehicles and other uses

Case Study: *The electric vehicle market in throughout Asia-Pacific compared*

- Institutional, private equity and venture capital investment in battery technology
- Public market opportunities for battery technology investment

Case Study: *ETFs covering battery storage and technology*

Costs and the demand for battery energy storage

- How to analyse battery costings

Case Study: *Battery LCOE and alternative costing methodologies*

- Overall energy demand in Asia-Pacific
- Renewable energy regulation and uptake in Asia-Pacific
- BTM vs FTM energy storage markets

National and state government initiatives in Australian and Asian jurisdictions

- Comparing battery strategies in Asia-Pacific jurisdictions – who has it right?
- Climate change and grid interruption

Group Exercise: *Analysing the Victorian Renewable Energy Zone plan*

- Technology of battery grid integration
- Land rights, permits, grid connection arrangements and meters
- Electricity markets and the role of batteries in demand response

Case Study: *Forecasting battery demand in Asia-Pacific jurisdictions*

Off-grid and PPA storage

- The logic of the renewable-battery choice for Asia-Pacific corporates
- Legal and regulatory issues

Case Study: *Replacing fossil fuel energy in mining – combining solar, fossil fuels and batteries*

Modules 3 and 4: Financing and modelling battery energy storage

Debt financing for batteries

- Which battery projects can now attract debt and why?
- Prevailing interest rates, terms and covenants from commercial and development sources
- The use of project finance for battery storage projects

Case Study: *Debt investment in battery storage projects*

- Comparisons with Asian jurisdictions – comparative support programmes
- The commitment of international organisations through guarantees and other measures

Case Study: *World Bank, IFC and ADB battery storage deals in Asia-Pacific*

Equity investment in battery storage

- Cashflow analysis of energy storage
- Capex and opex metrics
- Battery storage accounting issues
- Private vs public equity vs corporate investment for battery storage projects
- M&A in the battery storage, smart grid and energy efficiency sectors in Asia-Pacific
- Financing demand response firms in liberalised Asia-Pacific electricity markets

Case Study: *Reviewing battery storage FDI investment strategies in Asia-Pacific: Ørsted, Siemens, Vestas and other major companies*

Modelling investment in battery storage

- Using Excel for financial modelling
- Cashflow analysis of energy storage
- Capex and opex metrics
- Modelling grid integration and joint renewable-battery projects

Group Exercise: *Group Exercise: comparing IRRs for battery deals associated with renewable energy projects*

Course Conclusion

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