



SOLAR MEDIA
EVENTS | PUBLISHING | RESEARCH



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LARGE SCALE SOLAR EUROPE: THE TRANSITION TO SUBSIDY FREE

13-14 March 2018 | Aviva Stadium, Dublin, Ireland

Tickets available: subsidyfree.solarenergyevents.com/ticket-prices

40 + Expert speakers and key insights from asset owners,
developers and financiers across Europe including:



LIGHTSOURCE BP
Nick Boyle
Group CEO



GOVERNMENT OF PORTUGAL
Jorge Seguros Sanches
Secretary of State of Energy



**ASPER INVESTMENT
MANAGEMENT**
Luigi Pettinicchio
Co-Founder and CEO



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GREEN INVESTMENT GROUP**
Raphael Raggatt
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Andrew Wojtek
Director, Investment Management,
Renewable Energy and
Infrastructure



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Dr. Peer Piske
Business Development Director

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Confirmed speakers:



ADVENT RE
Alastair Dutton
Founder



CIRCLE ENERGY
Eduardo Soria
Partner



GOVERNMENT OF PORTUGAL
Jorge Seguros Sanches
Secretary of State of Energy



ALLIANZ GI
Armin Sandhövel
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CREDIT AGRICOLE CIB
Liam O'Keeffe
Managing Director



GREENCOAT CAPITAL
Richard Nourse
Managing Partner



AMARENCO
Fintan Whelan
Senior Advisor



CUBICO SUSTAINABLE INVESTMENTS
Maggie Kirilova
Vice President



GRIDSERVE
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AMARENCO
John Mullins
CEO



EIRGRID
Jon O'Sullivan
Co-Founder and Director



HIVE ENERGY
Hugh Brennan
Managing Director



AQUILA CAPITAL
Andrew Wojtek
Director, Investment Management, Renewable Energy and Infrastructure



ENCAVIS
Mario Schirru
Investment Director



IRENA
Pablo Ralon Associate Professional Renewable Costs and Performance



ASPER INVESTMENT MANAGEMENT
Luigi Pettinicchio
Co-Founder and CEO



ENERCOUTIM
Marc Rechter
Chairman



IRISH FARMERS ASSOCIATION (IFA)
Thomas Short
Chairman



BLUEFIELD
Giovanni Terranova
CEO



FORESIGHT LLP
Carlos Rey Micolau
Director



IQ.WIND
Mike Quirk
Owner



BRITISH SOLAR RENEWABLES
David Peill
Commercial Director



FORESIGHT LLP
Federico Giannadrea
Head of Foresight Italy and Southern Europe



KGAL
Matej Lednický
Head of Transaction Management Infrastructure



CAMBORNE ENERGY STORAGE
Harry Vickers
Business Development Manager



FOTOWATIO
Andrea Fontana
Managing Director of PV and Wind



LIGHTSOURCE BP
Nick Boyle
Group CEO

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Confirmed speakers:

**LIGHTSOURCE
RENEWABLE ENERGY**

Nick Robb
Head of Development
Ireland

**PÖYRY MANAGEMENT
CONSULTING**

Matt Brown
Vice President

**SOLAR ELECTRIC**

Robert Goss
Director

**MACQUARIE CAPITAL |
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Raphael Raggatt
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**RINA**

Simon Turner, Technical
Director Power and
Renewables

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Ezio Ravaccia
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**MASON HAYES
CURRAN**

Eoin Cassidy
Partner

**RÍOS RENOVABLES
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Felipe Enrique Blanco
General Director

**TRIODOS BANK**

Philip Bazin
Environment Team
Leader

**MONGOOSE ENERGY**

Robert Rabinowitz
Head of Capital Raising

**SANTANDER**

Alejandro Ciruelos
Managing Director,
Energy and
Infrastructure

**VOLTALIA**

Christian Egal
Head of European
Subsidiaries

**POWER CAPITAL
RENEWABLE ENERGY**

Justin Brown
Co-Founder and
Director

**SOLARCENTURY**

Dr. Peer Piske
Business Development
Director

**WElink**

John Murphy
CEO, Energy



FOR SPEAKING OPPORTUNITIES CONTACT

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LARGE SCALE SOLAR EUROPE: THE TRANSITION TO SUBSIDY FREE

As the first subsidy free solar projects begin to appear, Solar Media is preparing to mark the dawn of a new era of subsidy free business for Europe and with nearly 4GW of large scale solar in the UK's pipeline alone, the time for subsidy free solar has arrived.

THIS EVENT WILL UNCOVER

- **Markets** - where are the likely markets for the next post subsidy projects to take off?
- **Equipment** - what's "under the bonnet" of post subsidy projects and how is technology supporting a downward cost-curve?
- **How can developers** avoid a dilemma that puts cost over quality?
- **Energy pricing** - forecast and actual across European markets and how to assess what these mean for your projects?
- **Execution** - where are developers bringing cost down, how they are negotiating with suppliers?
- **Finance** - who's funding pipeline and what returns on investment are they expecting in this new era?
- **Grid** - how to maximise a grid connection with solar and storage as a discussion around ancillary services you can provide
- **How can you increase** the value of solar projects rather than just cutting costs?
- **MIP** - what next and what impact could other trade cases have on supply and cost of equipment

ATTENDEES WILL LEARN ABOUT:

recent utility scale subsidy free projects already deployed or in motion across Europe looking at opportunity and discover different feasible business models capable of operating free of a government support mechanism

COUNTRIES COVERED:



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Registration and refreshments

9:15 WELCOME

Advent Re | Alastair Dutton, Founder



09:30 NEW POLICY ANNOUNCEMENTS AND COMMITMENTS FROM PORTUGAL AND UK

- Discover the vision and expectation for the next 5-7 years from the regulator's perspective
- Update and history of government support mechanisms and policy
- Current and future plans to meet renewables targets in a post subsidy environment

Government of Portugal | Secretary of State of Energy, Jorge Seguros Sanches

Advent Re | Alastair Dutton, Founder

10:00 THE SCALE OF SUBSIDY-FREE SOLAR

- Where is the opportunity for SF in Europe and is now the right time to go subsidy free?
- How much is currently operational in Europe?
- Attitude and approach to subsidy free
- PPAs, C&I, Rooftop etc.

CHAIR: Lightsource BP | Nick Boyle, Group CEO

WElink Group | John Murphy, CEO Energy

Foresight LLP | Carlos Rey Micolau, Director

Allianz Renewable Energy Fund | Armin Sandhövel, CIO

11:00 Refreshment break

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YOUR SOLAR ENGINE

11:30 ESTABLISHING THE RIGHT FINANCIAL PROJECT PROFILE TO ENABLE GRID PARITY DEVELOPMENTS

- Challenges involved with banks or other lenders to forecast or hedge against power prices
- Lessons to be learned from the wind market
- Financial, corporate and private wire PPAs
- Finance risk associated with projects
- Where has the financing come from so far? Debt vs equity vs balance sheets
- Attracting finance to your European SF solar projects
 - Raising capital and approach for different risk profiles
 - Do's and Don'ts - what financiers want to see

CHAIR: Advent RE | Alastair Dutton, Founder

Aquila Capital | Andrew Wojtek., Director, Investment Management, Renewable Energy and Infrastructure

Santander | Alejandro Ciruelos, Energy and Infrastructure - Managing Director

Bluefield | Giovanni Terranova, CEO

Groupe Credit Agricole | Liam O'Keefe, Managing Director

Cubico Sustainable Investments | Maggie Kirilova, Vice President

12:30 THE FUTURE FOR WHOLESALE POWER PRICES IN EUROPE

- Expectations for the next 10 years
- What countries are best for Solar?
- Will solar eat itself – the risk of cannibalisation?
- How can you manage grid power price risk?

Pöry Management Consulting | Matt Brown, Vice President

13:00 Networking Lunch Break

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14:00 CURRENT AND POTENTIAL SUBSIDY FREE BUSINESS MODELS: ADDING STORAGE TO YOUR SOLAR SUBSIDY FREE SITE

- Mitigating risk with commercially viable co-location for solar with storage technologies
- Solar and storage as a service to balance the grid
 - Balancing Mechanisms
 - Frequency Response
- Capacity Market

GRIDSERVE | Toddington Harper, Managing Director

Camborne Energy Storage | Harry Vickers, Business Development Manager

British Solar Renewables | David Peill, Commercial Director

AFTERNOON CHAIR:

Fintan Whelan, Senior
Advisor at Amarengo

15:00 CASE STUDY - CLEAVE HILL - THE PIONEERING 350MW SOLAR FARM

Hive Energy | Hugh Brennan, Managing Director

15:30 Afternoon refreshment break

16:00 COMMUNITY SOLAR PROJECTS

- Crowd funding
- Community ownership
- Workable frameworks to build developments

Triodos Bank | Philip Bazin, Environment Team Manager

IQ.wind | Mike Quirk, Owner

Mongoose Energy | Robert Rabinowitz, Head of Capital Raising

Irish Farmers Association (IFA) | Thomas Short, Chairman

16:40 THE FUTURE OF IRELAND'S 5.6GW PIPELINE

- Unpacking the consultation
 - What we know so far
 - Likely scenarios
 - Impact on pipeline projects
 - Opportunity for new solar projects
- Planning and grid
 - The Enduring Connection Policy
 - Impact of new grid
 - DS3
- Solar Vs wind in a technology neutral approach
- Curtailment - direct impact on wind and knock on effect on the solar market
- ISEM – Ireland's Single Electricity Market
 - Impact on generator's financing
 - How renewables will be trading in ISEM – What are the options available and risks and opportunity for each
 - Examples and lessons to be learned from the UK
 - Concerns with how it has been set up
 - How secure is the planning?

Lightsource | Nick Robb, Head of Development Ireland

Solar Electric | Robert Goss, Director

Mason Hayes & Curran | Eoin Cassidy, Partner

Eirgrid | Jon O'Sullivan, Co-Founder and Director

17:30 Networking Drinks

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09:00 Registration & networking break

09:30 EXAMPLES OF PRIVATE PPAS AND INDIVIDUAL OFF-TAKER SUCCESS STORIES

- Under what conditions does a solar corporate PPA develop?
- What are the drivers for the off taker?
- What are the contractual factors to be considered on both sides?
- C&I rooftop – how attractive is this market space?

CHAIR: Asper Investment Management | Luigi Pettinicchio, Co-Founder and CEO

Amarengo | John Mullins, CEO

RINA | Simon Turner, Technical Director Power and Renewables

Power Capital Renewable Energy | Justin Brown, Co-Founder and Director

Capital Stage AG | Mario Schirru, Investment Director

10:10 GLOBAL SOLAR PV COST TRENDS TO 2020

- PV module and total installed cost trends
- Balance of system cost trends
- Levelised cost of electricity trends
- What to expect towards 2020

CHAIR: IRENA | Pablo Ralon, Associate Professional Renewable Costs and Performance

10:40 Networking break

11:10 THE SCOPE OF COST REDUCTION: OPTIMISATION AND OPERATIONAL EXCELLENCE

- Technical innovation
- Increasing margins with higher module efficiency
- The current trajectory of prices from then to now
- Supply chain engineering: using your supply chain to reduce production costs by up to 1/3
- How manufacturers can work with developers to stimulate this market
- Negating the impact of subsidy cuts with asset optimisation
- The end of MIP and the door opening to subsidy free
- O&M costs: how does it affect the lifetime of your subsidy free site?
- CapEx vs OpEx Scenario

Foresight LLP | Carlos Rey Micolau, Director

RINA | Simon Turner, Technical Director Power and Renewables

Volitalia | Christian Egal, Head of European Subsidiaries

Green Investment Bank Macquarie Capital | Raphael Raggatt, Vice President

11:50 EXPECTATIONS FOR UK'S SUBSIDY FREE MARKET

- With the UK exiting its era of subsidised solar what are the pros and cons for developers choosing to break into subsidy free solar?
- What sites are the most attractive to develop subsidy free and why?
- Current and future market trends – experts predict what the market could look like in 5 years
- Deep dive into current projects in motion – developers critique the feasibility and replicability of the business models seen on projects to date

Greencoat Capital | Richard Nourse, Managing Partner

Cubico Sustainable Investments | Maggie Kirilova, Vice President

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12:30 COUNTRY FOCUS ROUND TABLES

Key features to consider and attractiveness of each market



Netherlands and France

Encavis | Mario Schirru, Investment Director



Italy

Foresight LLP | Federico Giannadrea,
Head of Foresight Italy and Southern Europe

Solar Ventures | Ezio Ravaccia, CFO



Spain

Circle Energy | Eduardo Soria, Partner



Portugal

Enercouthim | Marc Rechter, Chairman

13:00 Lunch

14:00 IDENTIFYING AND ESTABLISHING THE RIGHT ENVIRONMENT FOR YOUR SUBSIDY FREE PROJECT



This session has insights from: Portugal, Italy, Germany, UK, Netherlands, France and Spain

- Site identification
- Grid connection: expected constraints and how to combat them
- Planning
- How to gain local community buy in
- Market trends, investor appetite and preferences

MODERATED BY: Enercouthim | Marc Rechter, Chairman

Solar Ventures | Ezio Ravaccia, CFO

Fotowatio | Andrea Fontana, Managing Director of PV and Wind

KGAL | Matej Lednický, Head of Transaction Management Infrastructure

Encavis | Mario Schirru, Investment Director

Solarcentury | Dr. Peer Piske Business Development Director

Circle Energy | Eduardo Soria, Partner

Ríos Renovables Group | Felipe Enrique Blanco, General Director

15:00 MARKET FOCUS: IBERIA – THE JOINT ELECTRICITY MARKET AND THE PROMISED LAND FOR SUBSIDY FREE?

- A deep dive into the current trajectory the Solar PV markets of Spain and Portugal
- Spanish recent auctions' impact on the market
- Projects: Projected, current and case studies and what's on the horizon?

MODERATED BY: Enercouthim | Marc Rechter, Chairman

Foresight LLP | Federico Giannadrea, Head of Foresight Italy and Southern Europe (case studies for Portugal and Spain)

Fotowatio | Andrea Fontana, Managing Director of PV and Wind

Circle Energy | Eduardo Soria, Partner

16:00 Afternoon refreshments available

17:00 CONFERENCE CLOSE

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