

SERA NEWSLETTER

June 2018

Rystad Energy - Your Energy Knowledge House

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RYSTAD ENERGY PRODUCT HIGHLIGHTS

[Sustainable Energy Research Analytics \(SERA\)](#)

- **SERA Tracker:** Up to date, detailed, and comprehensive database of solar, wind and storage assets in Australia

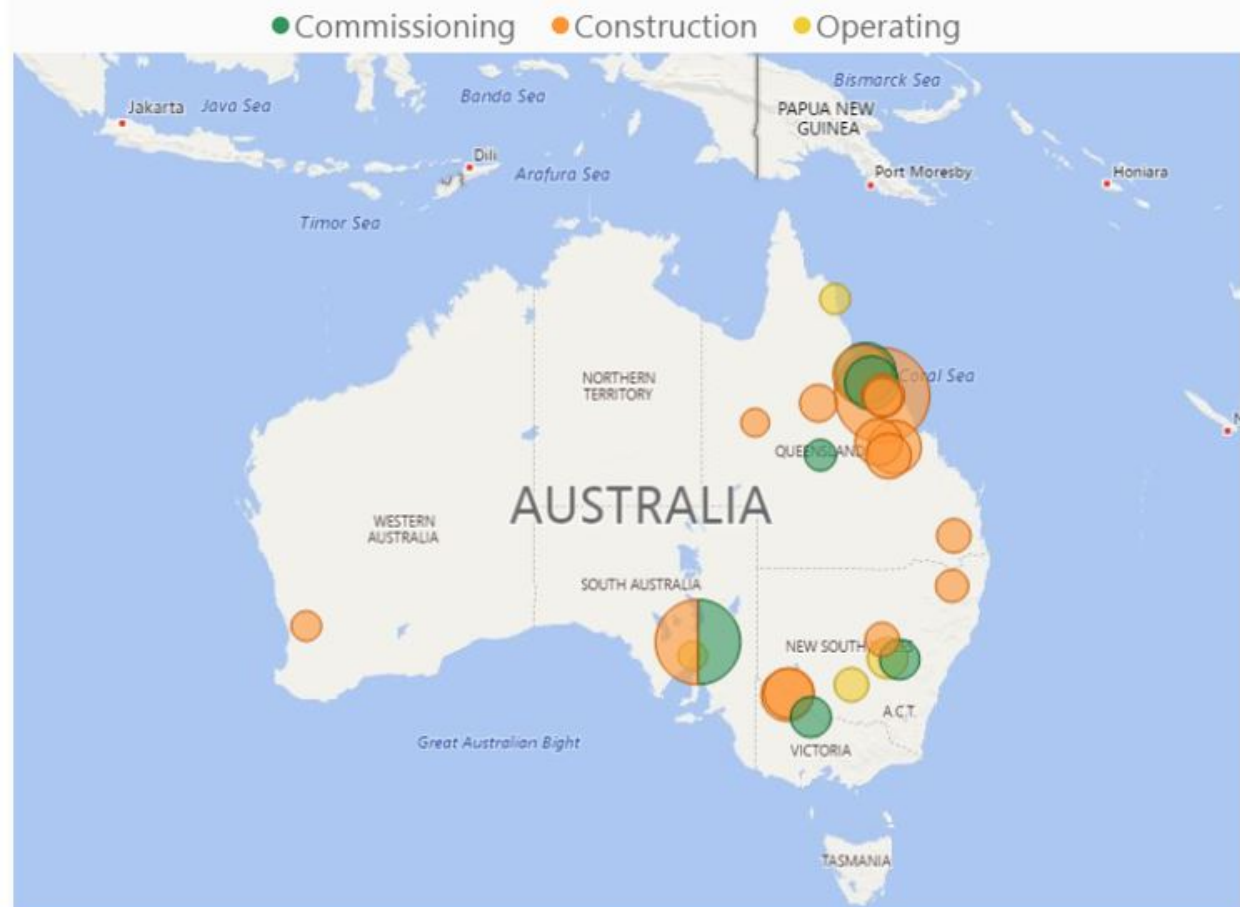
- **SERA product updates:** in May 2018, 18 assets operated by 12 companies were added to the SERA Tracker, accounting for 2.8 GW of capacity. Of the 18 new projects, 14 were solar, 3 were storage, and 1 was wind. Data for a further 24 projects, covering 12

Grid connections point to imminent solar flood

We have long pinpointed 2018 as the pivotal year for utility-scale solar in Australia, and the industry is now moving into the implementation phase. **A variety of solar farms are connecting to the grid as we speak, marking the start of the flood of solar production that is headed for Australia over the coming months.**

Solar projects to start in 2018 – locations

Bubble size represents Capacity, MWac



Source: Rystad Energy SERA Tracker

Key milestones in a solar project's lifecycle are mechanical completion, where the EPC contractor has finished construction work; energisation, where the project is connected to the grid and starts to inject

GW, was updated in the Tracker.

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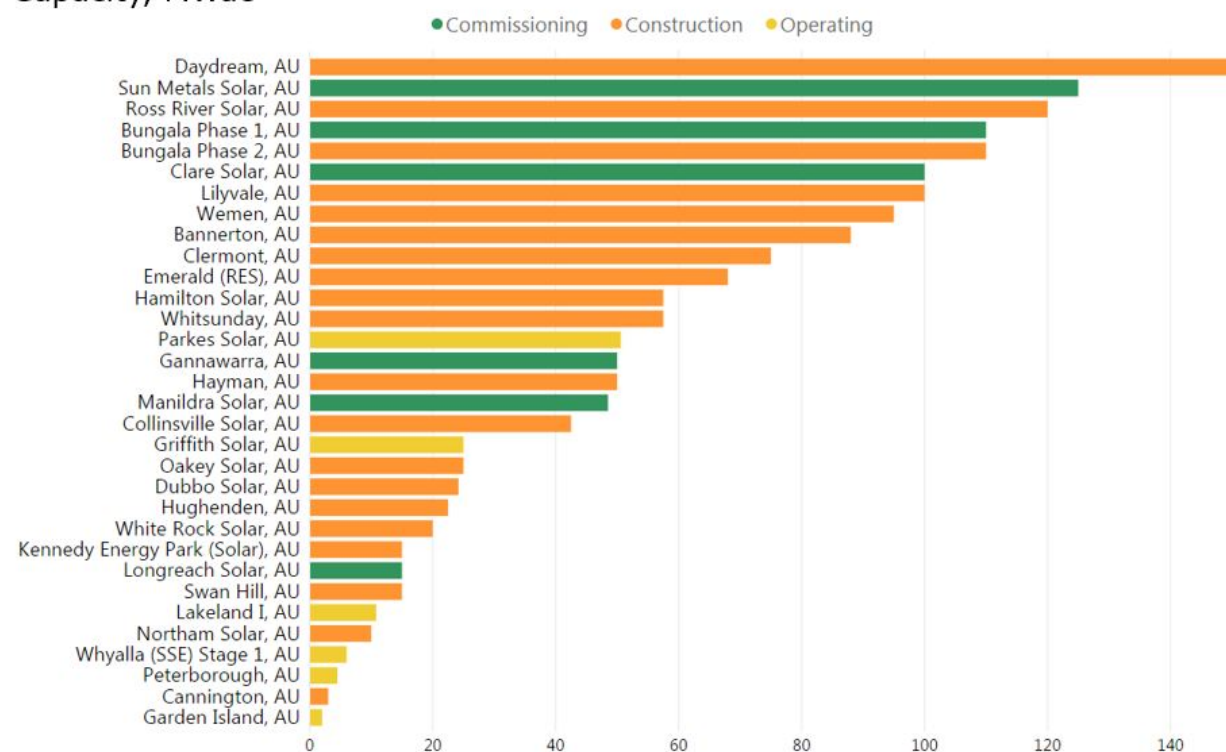
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electricity; **commissioning**, which is a process of gradually testing and increasing production; and **provisional acceptance**, when the owner takes control of the project once it has passed the testing regime.

While several of these milestones can be un-transparent, **data from the network operator AEMO provides insights into the energisation and commissioning of individual projects.** We can see the projects that are close to connection, those which have been energised and those which have achieved full production.

Solar projects to start in 2018 – by status

Capacity, MWac



Source: Rystad Energy SERA Tracker

So far, of the 2.1 GW AC of large scale solar capacity we expect to be commissioned this year, only 0.1 MW AC is fully operational. This comes from six projects, the largest of which is in New South Wales (Griffith and Parkes, both owned by Neoen). Smaller projects have also been commissioned in Queensland (Conergy's Lakeland), South Australia (Whyalla Stage 1 and Peterborough) and Western Australia (Garden Island).

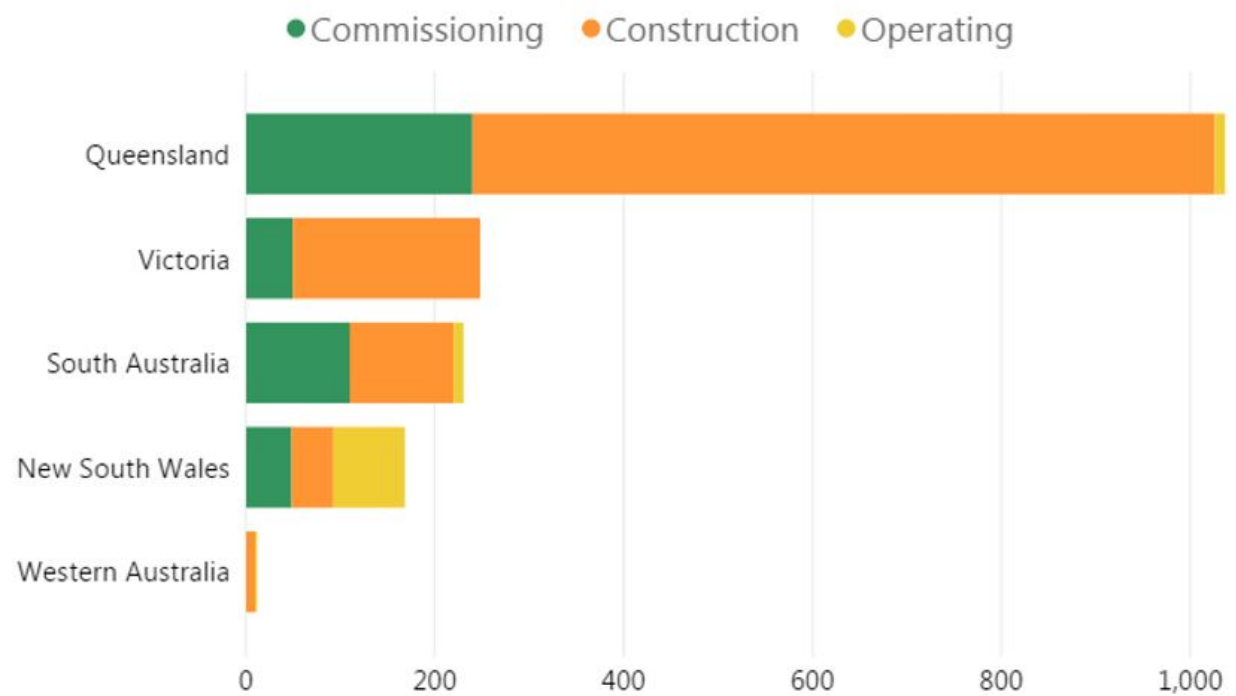
Currently, there are a further six projects that have been energised and are in the middle of the commissioning phase. Three are in Queensland (Sun Metals, Clare and Longreach), with one in each of Victoria, South Australia and New South Wales: Gannawarra, Bungala Phase 1 and Manildra respectively.

These projects amount to 449 MW AC, almost equal to the total operating capacity of utility scale solar in Australia. Commissioning schedules vary between projects, with larger solar installations unsurprisingly taking longer to commission. But we anticipate all six of these projects will be fully operational by July.

What comes next? **A number of solar farms are very close to being energised, and will likely start the commissioning process within the next month.** We will be keeping a close watch on Oakey, Hughenden, Hamilton, and Whitsunday in Queensland, and Dubbo in New South Wales. These projects account for 187 MW AC.

Solar projects to start in 2018 – by State

Capacity, MWac



Source: Rystad Energy SERA Tracker

Beyond these imminent connections, we estimate a further 1 GW AC of projects are under construction, and we expect these to be commissioned before the end of the year. The largest of these is Blackrock's Daydream project at 150 MW AC, followed by Palisade's Ross River solar (120 MW AC) and the second phase of the Bungala development (110 MW AC).



RYSTAD ENERGY

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