

DECEMBER 2019

CLEAN ENERGY OUTLOOK

The Clean Energy Outlook confidence index is the only index of its kind that provides an insight into the status of the Australian renewable energy and energy storage industry direct from the leaders and experts from within the industry. The key themes of the index cover investment confidence, employment trends and business challenges.

INVESTMENT CONFIDENCE

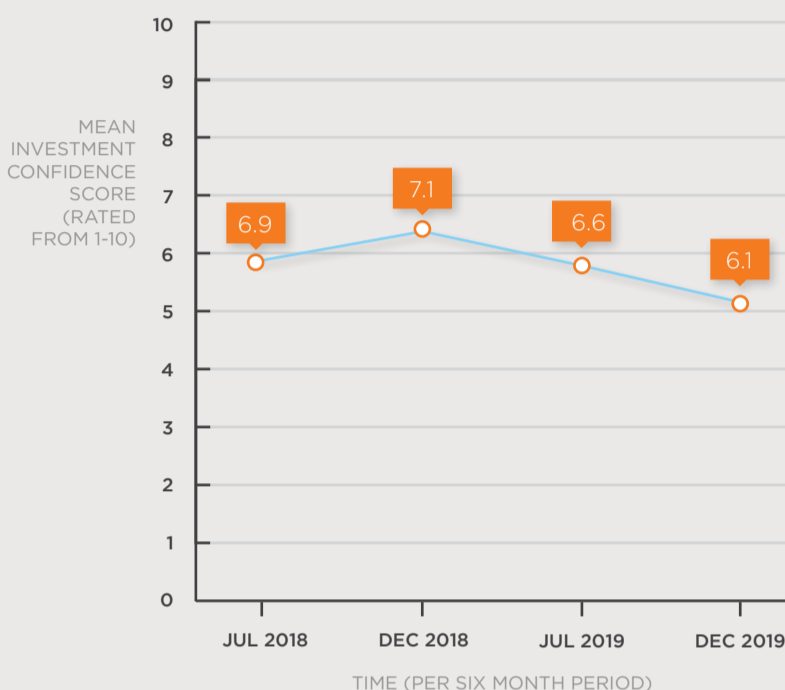
What is your level of confidence to make investments in clean energy in Australia in the next 3 years?



“The investment environment has become very challenging due to the lack of a federal policy to reduce emissions. Also grid and regulatory risks are very difficult to manage”

“As a developer we are very confident to invest however the network upgrades required will take 6 - 12 years so we believe the market will have continued volatility”

INVESTMENT CONFIDENCE OVER TIME

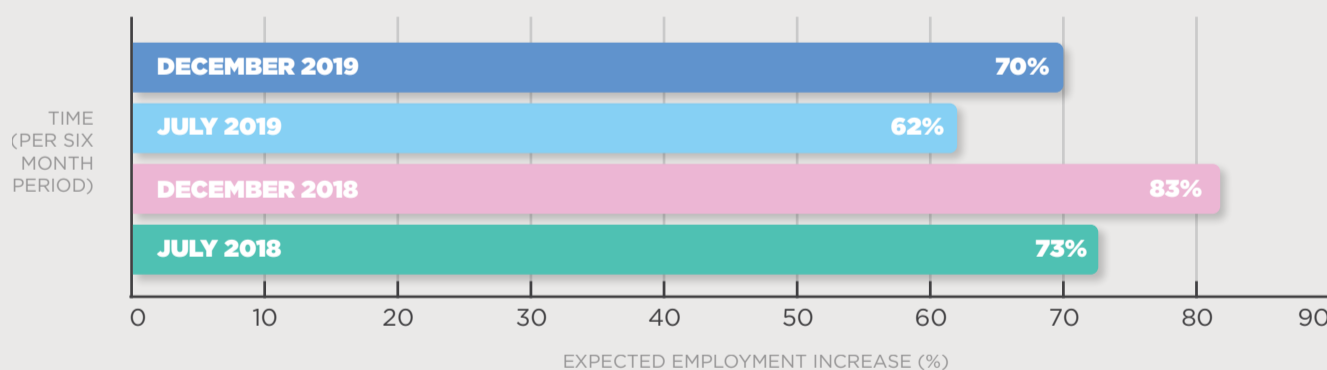


EMPLOYMENT

HOW DO YOU EXPECT THE NUMBER OF PEOPLE YOUR COMPANY EMPLOYS IN CLEAN ENERGY IN AUSTRALIA TO CHANGE IN THE NEXT 12 MONTHS?



EXPECTED EMPLOYMENT INCREASE OVER TIME



TOP BUSINESS CHALLENGES

What factors are creating the greatest challenges for your business to develop clean energy projects in Australia?

- Concerns and challenges related to grid connection process and technical requirements
- Lack of strong federal energy and climate policy
- Under-investment in network capacity to address congestion and constraints
- Concerns and uncertainty about marginal loss factors (MLFs)
- Unjustified government intervention in the energy market
- Lack of certainty about timing of exit of coal-fired power stations

“The regulatory environment, particularly as it relates to connection is nothing short of diabolical and seeks to only be getting worse. The impacts of this are flowing right down the supply chain and pain is being experienced at all levels”