Clean Energy opportunities in an emerging ASEAN Market - Cambodia

19 September, 2019
AGENDA

1. Welcome
   Ms. Yvonne Chan, Senior Trade Commissioner, Austrade

2. Overview on Political and Economic Trends in Cambodia
   Mr. Anthony Samson, Second Secretary, Australian Embassy in Cambodia

3. Overview of Cambodia’s Energy Sector: Opportunities and Challenges
   Mr. Morten Kvammen, Finance Advisor, Investing In Infrastructure (3i)

4. Investment in Renewable Energy in Cambodia
   Mr. Michel Koutsomanis, Cleantech Lead, DFDL

5. Implementation of solar projects in Cambodia
   Mr. Michael Freeman, Vice President Contract, Comin Khmere

6. General Q&As
   Ms. Bridget McIntosh, Country Director, EnergyLab Cambodia

7. Closing
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Overview of Cambodia’s Energy Sector

Morten Kvammen, Finance Adviser, 3i
Cambodia’s energy sector 2004-2019

- Transformational change
- 13x demand growth
- Development of centralized backbone infrastructure
- Focus on building large scale hydro and coal power plants
- $6 billion invested
  - Mainly local and Chinese capital

Source: EAC annual reports
Current status

- National transmission backbone
- >2.4 GW domestic generation capacity
- Self-sufficiency in rainy season
- Lowered, uniform tariffs across country
- 86.2% of villages, 72.2% of households connected
Energy 2020 Vision (2020-2028)

- 7.2 GW new generation capacity to be built to meet demand (3.5x existing capacity)
- Significant shift in global energy trends driven by smart grid technology, falling prices for RE, storage
- In communications, Cambodia jumped straight to 4.5G mobile
  - Will the same happen in the energy sector?

Source: EDC presentation at AmCham Energy 2020 Vision event in Phnom Penh, 5 July 2019
Renewable Energy Technical Working Group

- Technical Working Group (TWG) formed in June 2018
- Scope of work for the TWG
  - Prepare and a **detailed action plan** for the TWG to develop a draft of **Renewable Energy Master Plan**
  - Collect data and recommendations that are related to the preparation of the Renewable Energy Master Plan.
  - Collaborate closely with 3i in the **preparation** of the detailed action plan, **provision of topics for discussion**, and provision of **funds** for various studies, analyses, and evaluations on **pilot projects** of renewable energies and other main activities
- Detailed action plan for the TWG approved by the Minister, MME in December 2018
Key outputs from TWG work streams

• Detailed reports from consultants
  • Wind energy potential
  • BTM Solar potential
  • Renewable energy for off-grid electrification potential

• Draft renewable energy master plan
  • Including existing studies on large scale solar, mini/micro hydro, biomass, etc.
  • Providing input into Power Development Plan being updated by MME with support of ADB and Energia
### Opportunities for solar energy

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<thead>
<tr>
<th>Size</th>
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<tr>
<td>10 MW</td>
<td>Bavet</td>
<td>Sunseap / Schneitec</td>
</tr>
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<td>80 MW</td>
<td>Kampong Speu</td>
<td>Schneitec</td>
</tr>
<tr>
<td>60 MW</td>
<td>Kampong Chhnang</td>
<td>Schneitec</td>
</tr>
<tr>
<td>20 MW</td>
<td>Svay Rieng</td>
<td>Green Sustainable Ventures</td>
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<tr>
<td>60 MW</td>
<td>Battambang</td>
<td>Risen Energy</td>
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<tr>
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<td>Pursat</td>
<td>Schneitec</td>
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<td>30 MW</td>
<td>Pursat</td>
<td>Schneitec Infinite</td>
</tr>
<tr>
<td>30 MW</td>
<td>Banteay Meanchey</td>
<td>Ray Power Supply</td>
</tr>
<tr>
<td>60/100 MW</td>
<td>Kampong Chhnang</td>
<td>Prime Road Alternatives</td>
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</table>

410 / 450 MW of projects approved to date
Opportunities for wind energy

- Wind energy in Cambodia is well suited to complement other variable generation resources (hydro, solar)
- Wind power is expected to have a higher generation cost than solar but is competitive with coal and hydro
- First 82 MW wind project is slated to be built on the Bokor Mountain plateau near the coast

3i preliminary assessment of wind potential. Draft and subject to changes
Off-grid electrification

- All villages to be electrified by 2020
- 1,100 villages not yet connected to grid
- Opportunity for renewable energy hybrid mini-grids and other technologies to complement transmission line extensions
<table>
<thead>
<tr>
<th>1</th>
<th>Welcome</th>
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</thead>
<tbody>
<tr>
<td></td>
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<th>2</th>
<th>Overview on Political and Economic Trends in Cambodia</th>
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<th>Overview of Cambodia’s Energy Sector: Opportunities and Challenges</th>
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<td></td>
<td>Mr. Morten Kvammen, Finance Advisor, Investing In Infrastructure (3i)</td>
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<th>4</th>
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<td></td>
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<table>
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<tr>
<th>6</th>
<th>General Q&amp;As</th>
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</table>

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<th>Closing</th>
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</thead>
</table>
TABLE OF CONTENT

1. Investment Framework
2. Regulatory Environment
3. Market Entry for renewables energy
4. Conclusion
1 Investment Framework
CAMBODIA: INVESTMENT FRAMEWORK

- 100% foreign ownership permitted, except in certain sectors/national defense.
- Foreign investors cannot own land (but can enter into a JV with a Cambodian national). Foreign investors can lease long-term (50Y+50Y).
- USD 1,000 minimum capital requirement, except in certain sectors or if investment incentives are sought.
- Industry specific licenses for energy project.
- Foreign secured lending possible.
- No foreign exchange controls, except in limited circumstances.
- Foreign labour restrictions (10% quota), being more strictly enforced.
2 Regulatory Environment
**REGULATORY ENVIRONMENT – RELEVANT AUTHORITIES**

<table>
<thead>
<tr>
<th>Authority</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>Council for Development of Cambodia</td>
<td>Registration of the company to perform energy operations</td>
</tr>
<tr>
<td></td>
<td>‘One Stop Shop’ (in theory) but applications still needed for each registration</td>
</tr>
<tr>
<td></td>
<td>At least USD 2,000,000 of investment capital required for investment incentives</td>
</tr>
<tr>
<td></td>
<td>Conditional Registration Certificate and Final Registration Certificate issued upon approval</td>
</tr>
<tr>
<td>Ministry of Mines and Energy</td>
<td>Once registered with the CDC / MOC the company must provide of technical and financial capability to the MME</td>
</tr>
<tr>
<td>“MME”</td>
<td>Responsible entity for issuing laws and regulations with regards to electricity generation</td>
</tr>
<tr>
<td></td>
<td>Consultation authority for the feasibility of the intended generation project</td>
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<tr>
<td>Ministry of Environment</td>
<td>Requirement for Environmental Impact Assessment to be approved for development of energy projects</td>
</tr>
<tr>
<td>“MOE”</td>
<td>MOE permits needed for pollutants, emissions / discharges, including noise and hazardous materials</td>
</tr>
<tr>
<td>Electricity Authority of Cambodia</td>
<td>Established under the Electricity Law as an autonomous regulator to monitor and regulate the power sector in Cambodia</td>
</tr>
<tr>
<td>“EAC”</td>
<td>Responsible authority to issue the licenses and for the regulation of both private and public suppliers of electricity, including EDC</td>
</tr>
<tr>
<td>Electricité du Cambodge</td>
<td>A wholly state-owned limited liability private company</td>
</tr>
<tr>
<td>“EDC”</td>
<td>Established to develop, generate, transmit and distribute electric power throughout Cambodia and also to purchase electric energy from independent power producers on the basis of Power Purchase Agreements (“PPAs”)</td>
</tr>
</tbody>
</table>
## REGULATORY ENVIRONMENT – KEY LICENSES

| **Industry specific license** | ▪ Master Plan  
▪ Approval from MME on the feasibility study  
▪ Electricity license (for generation / transmission / sale of electricity) |
|-------------------------------|------------------------------------------------------------------------------------------------|
| **Land rights**               | ▪ Certificate of long-term lease  
▪ Acquisition  
▪ Sub-lease  
▪ Concession: if area located on government land |
| **Development rights**        | ▪ Issued to a qualified natural person or a legal entity  
▪ Construction permit from the Ministry of Land Management, Urban Planning and Construction (“MLMUPC”). |
| **Environmental aspects**     | ▪ EIA  
▪ Approval on the EIA from MOE  
▪ Environmental protection contract with MOE |
| **Other approvals**           | ▪ Location permit at the local level (district or Khan / commune or Sangkat)  
▪ License to develop road from MPWT  
▪ Authorization from MWRM for use of water  
▪ Approval for installation of water and electrical lines from MPWT |
REGULATORY ENVIRONMENT – APPROVAL PROCESS

Step 1: Consultation with MME about the feasibility of the project. Memorandum of understanding to be concluded with MME.

Step 2: Consultation with EAC about the electricity license to be obtained. Negotiation of the tariff with EAC.

Step 3: Negotiation of the terms of the PPA with EDC. Negotiation of the IA with MME.

Step 4: Consultation with MOE. EIA to be carried out and approved by MOE. Executing of the IA with MME and PPA with EAC.

Step 5: Draft version of the PPA to be approved by EAC. EPA to be signed with MOE.

Step 6: Application for the electricity license to be granted by EAC.

This is the process to obtain permission to connect a renewable energy project to the grid and the required steps to get a PPA and allow for a private sale of electricity (non-sale and power self-consumption excluded). Timeframe may vary between 6 to 15 months.
3 Market Entry
MARKET ENTRY – PROJECT TYPES

**OFF-GRID**

- Self-consumption
- Private sale of electricity
- Unregulated
  - Approval from EAC on the PPA (especially tariffs)
  - Compliance with technical standards

**CONNECTED TO THE GRID**

- Regulatory process to be followed (licensing requirement)
- Negotiation of PPA
- Compliance with technical standards
MARKET ENTRY – HOW TO INVEST IN RENEWABLE ENERGIES

3 WAYS TO INVEST IN A RENEWABLE ENERGIES PROJECT

Developing the renewable energy project from the beginning

- Whole regulatory process to be completed (depending on the project type)
- Incorporate locally a specific purpose vehicle

Acquisition of a company operating an existing plant

- Due diligence to project has been developed in accordance with the regulatory requirements
- Approval from the relevant governmental authorities to be requested (RGC, CDC, MME, MOC, MEF, EAC, EDC, GDT) before change of control of the project company

Acquisition of a company developing a renewable energy project

- Analysis of the viability of the project
- Due diligence to check that the project has complied with the regulatory requirements
- Approval from the relevant governmental authorities to be requested (RGC, CDC, MME, MOC, MEF, EAC, EDC, GDT) before change of control of the project company
- Assistance of the seller as local partner to provide relationship services with the authorities
MARKET ENTRY – CONTRACTUAL ASPECTS

### Operating lease
- Rent the plant to the customers and provision of operation and maintenance services (“O&M”).
- Rent fees and O&M costs can be freely negotiated and 100% variable, depending on solar plant performance.
- Buyout options of the equipment by the customer can be freely agreed between the Parties.
- Under this scheme, the customer will be considered as the entity generating the electricity.

### Vendor credit & services agreement
- Sell the solar plant to its customer. If transfer of ownership takes place at the time of the execution of the agreement, the customer will be considered as the owner of the solar plant and be therefore liable for obtaining the related license and approvals if applicable.
- The project company will provide O&M services and the customer will pay monthly principal and interest on vendor credit and O&M costs.
- Debt and interest fees are generally 100% variable, depending on solar plant performance.

### PPA / implementation agreement
The PPAs will generally cover the following conditions:
- (i) contract effectiveness;
- (ii) delivery and inspections of goods;
- (iii) insurance claims;
- (iv) payments to the contractor;
- (v) performance monitoring for consulting services and works;
- (vi) contractual disputes;
- (vii) delays in performance;
- (viii) claims for damages;
- (ix) initial and final takeover of construction works;
- (x) installation and commissioning of equipment;
- (xi) acceptance of consultants’ deliverables;
- (xii) release of performance securities and retentions; and
- (xiii) contract closure.

Currency: Riel official currency / dollar used in practice
Duration: twenty (20) years unless terminated earlier.
Language: English usually used for negotiation / Khmer translation often required
Governing law: no restriction but usually Cambodian law
The PPA shall also be submitted in draft to EAC for approval before signature
4 Conclusion
CAMBODIA: RELATIVE ANALYSIS

**Attractions**
- Few foreign ownership restrictions (open and competitive)
- Dollarized economy
- Strong governmental support for energy
- Favourable tax incentives through QIP
- Cheaper energy, transport and logistics costs, availability of skilled workforce

**Challenges**
- Infrastructure gap
- No specific incentives for renewables energy (but QIP available)
- Legal framework still improving
- Transparency (but recent efforts to address)
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COMIN GROUP HISTORY

1992
Comin Khmere incorporation of Comin Asia in Singapore

2006
Comin Asia partnership with KONE

2011
Joint Venture between Comin Asia & PCS

2013
Incorporation of Comin Myanmar open office in Yangon

1998
Comin Asia opens representative offices in Vietnam

2010
Comin Asia acquisition by RMA

2012
Incorporation of Comin Laos open office in Vientiane

Work force
Over 1,700 Employees

Regional Presence
- Cambodia
- Laos
- Myanmar
- Vietnam

Certifications
- ISO 9001:2015
- OHSAS 18001
Cambodian Energy Situation
Supply vs Demand 2012-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>Import Via Distribution line</th>
<th>Import Via High Voltage</th>
<th>Fuel Oil</th>
<th>Solar</th>
<th>Biomass</th>
<th>Hydro</th>
<th>Coal</th>
<th>Peak Demand</th>
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<td>2012</td>
<td>78</td>
<td>250</td>
<td>219</td>
<td>-</td>
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<td>90</td>
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<td>2013</td>
<td>65</td>
<td>250</td>
<td>225</td>
<td>-</td>
<td>-</td>
<td>205</td>
<td>10</td>
<td>625</td>
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<tr>
<td>2014</td>
<td>65</td>
<td>320</td>
<td>218</td>
<td>-</td>
<td>-</td>
<td>371</td>
<td>108</td>
<td>784</td>
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<tr>
<td>2015</td>
<td>68</td>
<td>320</td>
<td>218</td>
<td>-</td>
<td>6</td>
<td>371</td>
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<td>-</td>
<td>6</td>
<td>371</td>
<td>359</td>
<td>1,068</td>
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<tr>
<td>2017</td>
<td>68</td>
<td>340</td>
<td>218</td>
<td>10</td>
<td>14</td>
<td>531</td>
<td>485</td>
<td>1,269</td>
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<tr>
<td>2018</td>
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<td>340</td>
<td>218</td>
<td>10</td>
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<td>1,537</td>
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<td>10</td>
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<td>399</td>
<td>485</td>
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Cambodian Energy Demand Outlook in MW 2018-2019
Proposed new tariff good for solar

<table>
<thead>
<tr>
<th>Nº</th>
<th>Conditions Industrial and Agriculture Consumer</th>
<th>General Rate USD/kWh</th>
<th>Rate based on Time &amp; Power Capacity</th>
<th>Rate time from 7:00-21:00 USD/kWh</th>
<th>Rate time from 21:00-7:00 USD/kWh</th>
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<tbody>
<tr>
<td>1</td>
<td>Bulk consumer connects to HV 115/230 kV National Substation</td>
<td>0.117</td>
<td>2.90</td>
<td>0.117</td>
<td>0.096</td>
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<td>2</td>
<td>Bulk consumer connects to MV 22/35 kV National Substation in Province</td>
<td>0.0122</td>
<td>3.30</td>
<td>0.122</td>
<td>0.098</td>
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<td>3</td>
<td>Bulk consumer connects to MV 22/35 kV National Substation in Phnom Penh and Takhmao</td>
<td>0.135</td>
<td>4.95</td>
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<td>4</td>
<td>Bulk consumer connects to MV 22/35 kV Distribution Line</td>
<td>0.147</td>
<td>5.60</td>
<td>0.140</td>
<td>0.115</td>
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</table>
Implementation of commercial projects

Challenges

- Grid-Tie
- No Feedback
- No Net Metering
- Legislative Changes
Implementation of commercial projects

OPPORTUNITIES

- High cost of grid electricity
- Industrial growth
- More international clients with carbon targets
- Market open for investment – PPA Providers
CHIP MONG INSEE – 10MWP

Date: 2018
Location: Kampot Province
Type: Rooftop grid-tied and Floating
PROJECT HIGHLIGHT

COCA COLA – 2.6MWP

Date: 2016
Location: PPSEZ, Phnom Penh
Type: Rooftop grid-tied
PROJECT HIGHLIGHT

ISI STEEL FACTORY – 1MWP

Date: 2017
Location: Phnom Penh
Type: Rooftop grid-tied
PROJECT HIGHLIGHT

ISPP INTERNATIONAL SCHOOL – 800KWP

Date: 2017
Location: Phnom Penh
Type: Rooftop grid-tied
SHEICO – 858KWP

Date: 2017
Location: Phnom Penh
Type: Rooftop grid-tied
PROJECT HIGHLIGHT

ANGKOR DAIRY – 466KWP

Date: 2017
Location: PPSEZ, Phnom Penh
Type: Rooftop grid-tied
PROJECT HIGHLIGHT

TOTAL GAS STATION – 353KWP

Date: 2018
Location: Phnom Penh
Type: Rooftop grid-tied
## PROJECT SUMMARY

### Projects List Summary

<table>
<thead>
<tr>
<th>Client</th>
<th>Location</th>
<th>Type</th>
<th>Scope of work</th>
<th>Year</th>
<th>Capacity</th>
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</thead>
<tbody>
<tr>
<td>Bolloré</td>
<td>Siem Reap</td>
<td>Ground mounted</td>
<td>EPC</td>
<td>2013</td>
<td>70 kWp</td>
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<td>Grid-tied</td>
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<tr>
<td>PSE</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2013</td>
<td>35 kWp</td>
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<td>Laureton</td>
<td>Phnom Penh</td>
<td>Ground mounted</td>
<td>EPC</td>
<td>2014</td>
<td>143 kWp</td>
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<tr>
<td></td>
<td></td>
<td>grid-tied, parking roof</td>
<td></td>
<td></td>
<td></td>
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<td>Phnom Penh Special Economic Zone</td>
<td>Phnom Penh</td>
<td>Ground mounted</td>
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<td>Pactics factory</td>
<td>Siem Reap</td>
<td>Ground mounted</td>
<td>EPC</td>
<td>2015</td>
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<td>Ecole Paul Dubrule</td>
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<td>Ground mounted</td>
<td>EPC</td>
<td>2012</td>
<td>17 kWp</td>
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<td>Kep</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2017</td>
<td>17 kWp</td>
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<td>Rooftop grid-tied</td>
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<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
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<td>International School of Phnom Penh</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2017</td>
<td>800 kWp</td>
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<tr>
<td>US Embassy</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2017</td>
<td>300 kWp</td>
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<td>PSE</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2018</td>
<td>30 kWp</td>
</tr>
<tr>
<td>Horseware products</td>
<td>Sihanoukville</td>
<td>Rooftop grid-tied</td>
<td>Design</td>
<td>2018</td>
<td>125 kWp</td>
</tr>
<tr>
<td>Total – Gas stations phase 1</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2018</td>
<td>234 kWp</td>
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<tr>
<td>Total – Gas stations phase 2</td>
<td>Cambodia</td>
<td>Rooftop grid-tied</td>
<td>Design</td>
<td>2018</td>
<td>120 kWp</td>
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<td>United Nations Development Program building</td>
<td>Phnom Penh</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2018</td>
<td>26 kWp</td>
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<td>GMAC office</td>
<td>Phnom Penh</td>
<td>Flat roof grid-tied</td>
<td>EPC</td>
<td>2018</td>
<td>53 kWp</td>
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<td>Chip Mong Insee Cement</td>
<td>Cambodia</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2018</td>
<td>10 MWp</td>
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<tr>
<td>Factory (in progress)</td>
<td>Cambodia</td>
<td>Rooftop grid-tied Floating</td>
<td>EPC</td>
<td>2018</td>
<td>500 kWp</td>
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<td>Factory (in progress)</td>
<td>Cambodia</td>
<td>Rooftop grid-tied</td>
<td>EPC</td>
<td>2019</td>
<td>3.1 MWp</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>20.7 MWp</strong></td>
</tr>
</tbody>
</table>
AGENDA

1. Welcome
   Ms. Yvonne Chan, Senior Trade Commissioner, Austrade

2. Overview on Political and Economic Trends in Cambodia
   Mr. Anthony Samson, Second Secretary, Australian Embassy in Cambodia

3. Overview of Cambodia’s Energy Sector: Opportunities and Challenges
   Mr. Morten Kvammen, Finance Advisor, Investing In Infrastructure (3i)

4. Investment in Cambodia’s Renewable Energy
   Mr. Michel Koutsomanis, Cleantech Lead, DFDL

5. Implementation of solar projects in Cambodia
   Mr. Michael Freeman, Vice President Contract, Comin Khmere

6. General Q&As
   Ms. Bridget McIntosh, Country Director, EnergyLab Cambodia

7. Closing
Thank you

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