150 MW Solar PV + 55 MW BESS Development Opportunity

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150 MW Solar PV + 55 MW BESS Development Opportunity

A large-scale utility renewable energy development opportunity in Poland is available for acquisition through an existing project SPV. The project comprises up to 150 MW of solar PV capacity, supported by a proposed 55 MW Battery Energy Storage System (BESS), with an established project package including land rights, permits, environmental approvals and grid-connection documentation. The existing SPV is positioned as a turnkey development vehicle holding the relevant project rights and documentation. The opportunity is designed to provide an investor with a substantially advanced route into the Polish renewable energy market, subject to legal, technical, commercial and regulatory due diligence.

KEY INVESTMENT HIGHLIGHTS

- Up to 150 MW Solar PV capacity
- 55 MW BESS currently proposed, with potential for a larger storage configuration subject to grid/operator approval
- Existing Polish project SPV available for 100% acquisition
- Project package includes established permits, land-control arrangements and grid-connection documentation
- Grid connection infrastructure represented as available, with no current users connected
- Approximately 9 km dedicated cable route required for the PV grid connection
- ENEA grid connection conditions / agreement included in the project documentation
- Building permit and environmental / zoning documentation reportedly in place
- Comprehensive project data room prepared
- Estimated total project CAPEX of approximately EUR 207.6 million
- Indicative SPV / project package acquisition price of EUR 12.5 million
- BESS application and development pathway identified
- Estimated construction and infrastructure rollout of approximately 24 months, subject to financing and due diligence
- Opportunity to acquire an advanced development platform rather than originate a new project from the ground up
- Strong potential strategic fit for infrastructure funds, renewable energy investors, IPPs and financial sponsors seeking Polish exposure

PROJECT OVERVIEW

Item	Indicative Details
Country	Poland
Technology	Solar PV + Battery Energy Storage
PV Capacity	Up to 150 MW
BESS Capacity	55 MW proposed
Grid Connection	ENEA-related grid infrastructure
Cable Route	Approx. 9 km
Project SPV	Existing Polish SPV
SPV Ownership Offered	100%
Estimated Project CAPEX	Approx. EUR 207.6M

TARGET PRICE
EUR 12,500,000

GROSS REVENUE
EUR 18,310,000

EBITDA
EUR 15,210,000

BUSINESS TYPE
Renewable Energy - Solar PV & BESS

COUNTRY
Poland

BUSINESS ID
L#20261139

Item	Indicative Details
SPV / Project Package Price	EUR 12.5M
Indicative Construction Period	Approx. 2 years
BESS Development	Application process to be confirmed
Transaction Structure	100% SPV / project package acquisition

PROJECT STATUS & DEVELOPMENT PACKAGE

The existing SPV has been established to hold and manage the relevant project rights, permits and development documentation.

The available project package is represented to include:

- Corporate SPV documentation
- Shareholder and UBO documentation
- Land lease and land-control documentation
- Land-register extracts
- Cadastral maps
- Zoning / WZ decisions
- Environmental decisions
- Building permit
- Grid-connection conditions / agreement
- Evidence of grid-related payments
- Cable-route documentation
- CAPEX assumptions and financial model
- BESS application and development documentation

The documentation is intended to provide investors with a clear basis for conducting legal, technical, grid and financial due diligence.

GRID & INFRASTRUCTURE

The project benefits from an advanced grid-connection position, with a new or upgraded grid point represented as available for the project.

A dedicated approximately 9 km cable route is contemplated to connect the solar PV facility to the grid.

The estimated cost of the grid cable infrastructure is approximately:

PLN 9 million / EUR 2.1 million

The project documentation includes grid-related agreements, payment evidence and cable-route information, subject to independent verification.

BATTERY ENERGY STORAGE

A 55 MW BESS is currently contemplated as part of the project configuration.

The storage component provides the potential to enhance the project's grid flexibility and commercial optimization opportunities.

The current development assumptions include:

- Proposed BESS capacity: 55 MW
- BESS application process to be initiated / progressed
- Indicative application timeline: approximately 6 months
- Indicative review period: approximately 3 months
- Potential for a larger BESS configuration subject to grid-operator approval
- Additional land requirement estimated at approximately 1 hectare

Final BESS capacity, MWh duration, application structure and operator acceptance remain subject to confirmation and due diligence.

TRANSACTION SUMMARY

Opportunity: Acquisition of an advanced Polish utility-scale renewable energy project

Capacity:150 MW Solar PV + 55 MW BESS

Existing Structure: Polish SPV

Acquisition: 100% of SPV / project package

Indicative Acquisition Price:EUR 12.5M

Estimated Total Project CAPEX:EUR 207.6M

Grid Cable: Approx. 9 km

Indicative Construction Timeline: Approx. 24 months

Status: Advanced development stage, subject to independent due diligence

Availability: Confidential / Qualified Investors Only

Metric / Scenario Component	Conservative	Moderate (Base Case)	Optimistic
Solar Specific Yield	1,020 kWh/kWp (153.0 GWh/yr)	1,070 kWh/kWp (160.5 GWh/yr)	1,120 kWh/kWp (168.0 GWh/yr)
Grid Curtailment Rate	6.0%	3.5%	1.5%
Net Solar Generation	**143.8 GWh/yr**	**154.9 GWh/yr**	**165.5 GWh/yr**
Realized Solar Capture Price	€52.00 / MWh	€64.00 / MWh	€75.00 / MWh
Solar Annual Revenue	**€7.48M**	**€9.91M**	**€12.41M**
BESS System Configuration	55 MW / 110 MWh (2h)	55 MW / 220 MWh (4h)	55 MW / 220 MWh (4h)
BESS Arbitrage Spread	€55/MWh (280 eq. cycles)	€75/MWh (330 eq. cycles)	€90/MWh (365 eq. cycles)
Polish Capacity Market Clearing	No contract / merchant only	350 PLN/kW/yr (~€81/kW/yr)	420 PLN/kW/yr (~€98/kW/yr)
BESS Ancillary & DSR Services	€15k / MW / yr	€25k / MW / yr	€38k / MW / yr
BESS Annual Net Revenue	**€2.52M**	**€8.40M**	**€10.74M**
Gross Operating Revenue (COD)	**€10.00M**	**€18.31M**	**€23.15M**
Total OPEX & Land Leases	(€2.65M)	(€3.10M)	(€3.30M)
Project EBITDA (Yr 1)	**€7.35M (73.5% margin)**	**€15.21M (83.1% margin)**	**€19.85M (85.7% margin)**
Total Invested Capital (Acquisition + CAPEX)	**€220.1M**	**€220.1M**	**€220.1M**
Project Unlevered Pre-Tax IRR (25y)	**1.8%**	**6.1%**	**8.6%**
Levered Equity IRR (70% D/E)	**Negative / Unviable**	**7.4%**	**12.2%**
Equity Payback Period	>25 Years	~13.5 Years	~8.8 Years

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