

Lunchtime series

Provocations and Inspirations

Energy: Cost and Enabling Technologies

Tim Buckley

Founder of the public interest think tank, Climate Energy Finance

Date: Tuesday 19 May 2026

12:15 pm for a 12:30 start.

Finishes 2:00 pm.

Venue: Union University and Schools Club, 25 Bent Street, Sydney (corner of Bent and Phillip Streets)

Registration: Registration at [this link](#) is required **before 2.00 pm on Thursday 14 May 2026**. Numbers are limited.

Cost: \$75 (RSNSW or UUSC members); \$85 (non-members/guests). *A warm meal and wine will be served for lunch.*

Dress: Business Dress. To avoid embarrassment, please note that a jacket and tie is required. **Denim, trainers and shoes with white soles are not permitted.** Attendees not dressed appropriately may be refused entry by the Club.

Energy: Cost and Enabling Technologies

A Future Made in Australia (FMiA) is a major federal government program (announced in the 2024-25 Federal budget) that establishes a policy framework called the National Interest Framework (NIF) that imposes rigour on government decision-making on public investments, particularly those that need to attract large-scale private investment. The program will see investment of \$22.7 billion over the next decade focused on two major streams:

- Net zero transformation; and
- Economic security and resilience

At the heart of this challenge is the availability and cost of energy, a challenge brought into particularly sharp focus recently by the war being waged in the Middle East.

Tim will talk to the accelerating global energy system transformation, with a focus on China's growing leadership role, particularly in light of the energy security and trade headwinds caused by the Trump administration, which has doubled down on climate science denialism, trade wars and fossil fuels. China leads the world in terms of research and development, manufacturing, domestic deployments and exports of all zero emissions growth industries of the future. CEF has also tracked China's growth in outbound foreign direct investment in cleantech, both in terms of renewables infrastructure and foreign manufacturing capacities, as a new geopolitical bridge to build China's international

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standing, even as the US undermines its own standing. China is also investing aggressively in upstream critical minerals and strategic metals mining, and upstream value-adding, creating a growing pressure on Australia's world leading mining sector. Australia has made some strong progress under the current Federal government's embrace of electrification and decarbonisation, as it tries to reverse the decades long deindustrialization of our economy with its FMIA. But even as Australia seeks to pivot from our petrostate past to embrace the investment, employment and export opportunities for Australia as an electrostate, there are headwinds. The old fossil fuel incumbents will not go quietly! And even as Australia's two-way trade with China reached a record high of A\$300bn in 2025, there are headwinds. Chinese investment into Australia over the last 3 years is at a two decade low. If Australia does not want to work with our #1 trade partner, we should not be surprised when China goes elsewhere, at our economic and trade cost.

About the Speaker



Tim Buckley, Founder of the public interest think tank, Climate Energy Finance.

Climate Energy Finance (CEF) is an independent, non-partisan, and philanthropically funded Australian think tank established in 2022 that works *pro bono* in the public interest to accelerate the transition in Australia to net zero in line with the climate science.

CEF conducts research and analyses on the current strategic, financial and geopolitical issues that are shaping the global energy transition and their implications for the Australian economy, with a focus on the challenges and opportunities for Australian investments, industry and exports. This involves tracking and providing independent commentary on developments in China and other key trading partners in the Asia Pacific region, as well as advocating for stronger mutually beneficial collaboration with these partners. CEF also examines the convergence of global technology trends in power, transport, mining and industry in accelerating decarbonisation.

Tim has 35 years of financial market experience covering the Australian, Asian and global equity markets and is a highly influential energy finance commentator. He has written more than 100 reports on the global energy transition and the roles of finance and policy in accelerating critical decarbonisation trends.

Tim was previously the Australasian Director of the global Institute for Energy Economics and Financial Analysis, 2013-2021. Prior to this, he was a top-rated equity research analyst, including Head of Equity Research in Singapore at Deutsche Bank, Managing Director, Head of Equity Research at Citigroup for 17 years, Head of Institutional Equities at Shaw & Partners and co-Managing Director of Arkx Investment Management Pty Ltd, a global, listed clean energy investment start-up, jointly owned with Westpac.