4th Edition



22-23 March 2022 | Sheraton Austin Hotel at the Capitol, Austin, TX.

Post Show Report

Hello, I want to start by thanking all the speakers, sponsors, and attendees who made this year's Energy Storage Summit USA possible, and to all those who travelled to Austin to make the event such a success. With the challenges over the last couple of years in hosting live events, it was incredible to be able to welcome you all again in person – and the benefits of being able to network and discuss ideas face to face were clear.

Those two years have been a period of massive growth for energy storage, and that was clear to see from the diverse audience in attendance from right across the United States. A huge amount of ground was covered in this year's event, and it was encouraging to see the huge variety of organisations who are getting involved in storage.

Texas having had the grid challenges that it has made it an ideal location for this year's summit, and it was fascinating to see speakers join together from our opening panel to talk about how energy storage has been developing in the state, as well as a presentation by ERCOT later in the day. Key trends across the two days included long duration and supply chain issues. Green hydrogen and other alternative technologies was another trend that kept coming up, and is definitely one to watch in future.

Next year's Energy Storage Summit USA promises to be even bigger, and I am looking forward to seeing you there to share in your successes as the industry rolls out energy storage at an ever increasing rate.



George Turner | Senior Conference Producer

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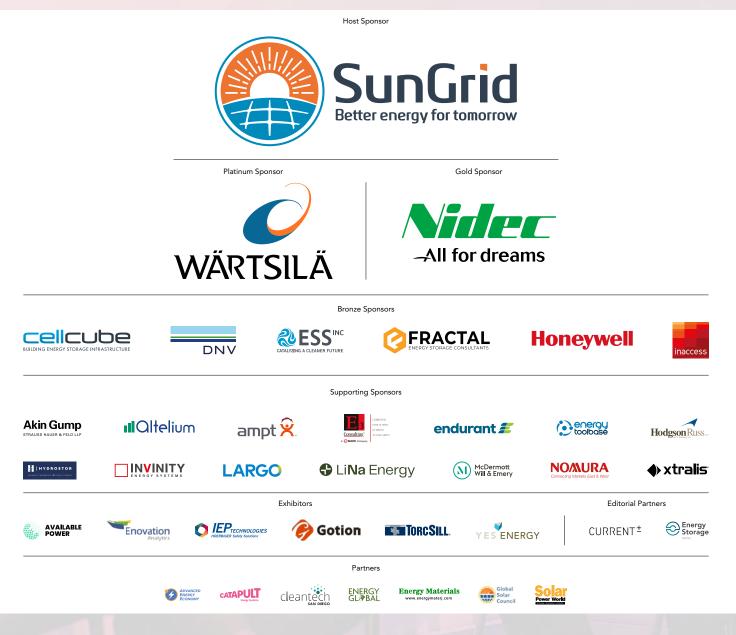
#StorageSummit





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How Would You Describe the Summit to a Peer or a Colleague?

- Very helpful deep dive for someone new to the storage space" Elizabeth Hiss, Brown Advisory
- Able to network with industry experts" Connor Bentley, SunGrid
- It is a great opportunity to discover new information on the energy storage sector"
 Kersey Reed, QIC
- Best Energy Storage only event" Scott Perry, Greengate Power
- Great place to learn about Energy Storage and how it's best structured and meet the key players in the sector" Fanny Lopez, North American Development Bank
- The summit facilitated genuine dialogue regarding the opportunities and challenges facing the energy storage industry" **Ricardo Rodriguez, Apex Clean Energy**
 - Key conference to meet finance and investment peers" Christopher Melley, EnQuest

- Diverse attendees representing all major stakeholders" Elizabeth Murphy, Utopus Insights
- Wide coverage of the BESS market situation. Interesting and detailed information covered" Jorge Romero, Uriel Renewables, Inc
- The event to meet both solar and BESS developers and IPPs... opportunity to network with those interested in developing BESS in ERCOT"
 - Chris Casale, Fluence
- I could do a month of cold outreach or I could just this ONE customer-dense event and achieve the same marketing/sales goal" Elias Hatem, inBalance
- A meeting of the "who's, who" of storage" Aaron Oaks, BASF
- Large concentration of developers, IPPs, and investors" Tom Thunell, Tyba

Our 2022 Speakers Included:



SunGrid





VP of Grid Planning ERCOT

Storage

Endurant Energy

Mike Lona

engineering

Leclanche



Sripradha Ilango CFO Soltage

Christine Bonaguide Partner Hodgson Russ



Gene Lewis

LINA

Alain Halim Executive Director, Infrastructure and Power

> Finance Nomura

Dwayne Krpan Director of Origination East Point Energy



Raafe Khan Director PineGate Renewables



Ahmed Mousa Manager PSEG



Dana Sands Energy Infrastructure Partners



Patrick Norton Manging Director Head of M&A and Capital Javelin Capital







Charley Grimston Executive Chairman Head of Infrastructure Altelium



Stephen Prince President Largo Clean Energy



Enrico Ladendorf Vice President, Technology Director, system and software and Product Operations **Energy Toolbase**



Devrim Celal Krakenflex



Markets

Clenera

Christos Georg Co-Founder & CEO Inaccess



Dan Lynch Partner Akin Gump



Goldman Sachs

Investec



Adam Gerza VP, Business Development Energy Toolbase

storageusa.solarenergyevents.com

Our 2022 Speakers Included:

Bill Sproull

ESS INC

Analysis

Honeywell

Cell Cube





Conor McKenna Managing Director CohnReznick Capital

Amy Liu Senior Manager, Business VP Business Development Development, Energy Storage & Optimization Wärtsilä



Will McNamara Policy Expert, Grid Energy Storage Sandia

Beth Garza Senior Fellow **R** Street Institute

Sammy Germany Lead EES engineer Nidec





Yuri Freedman Sr director SoCalGas



abelle Christensen Borrego Solar



Mohammed Hoda Principal Analyst – Global, Jin Noh Policy Director California Energy Storage Project Feasibility and Alliance



Scott Peattie Director, Business Development Sunrun



Ed Gunn Global Commercial Director Moixa



Senior Consultant -Energy Storage DNV



leader

E3 Consulting



Management ESS INC



Shaheer Aziz Senior Director. Business Development Hydrostor



Jan Petrenko Regional Manager, North America Invinity Energy Systems



Steve Cumn Director. Sensors Business Honeywell Xtralis



Rahul Verma VP of Analytics Fractal Energy Storage Consultants



Carl Fleming Partner McDermott Will & Emery LLP



Country Lead, USA,

Aurora Energy Research

Marketing

AMPT



Jonathan Posta Founder / CEO Nikola Power

Key 2022 Themes

The evolution of the grid



As we transition towards a zeroemission electricity sector it will naturally require large scale storage in abundance. This poses the question how will a centrally-controlled resource accommodate for a growing storage market?

Finance

The age-old question is how do we make these projects bankable, and ultimately, how do we get project finance into the storage market? Join us as we listen from industry experts on the financial

facing storage

Maximizing revenue opportunities

Battery deployment and storage have a range of revenue streams available to you. Understand the projects which are most bankable for you and provide the best ROI.

The unlocked potential of long-duration storage The future of longduration storage

is here. How can we best maximize your revenue streams, and more importantly, assess the bankability of these projects and they fit into the market.

Looking towards the future, market forecasts How do we predict an inevitably will delve into previous forecasts and analysis

of the storage market of the last ten years and see what the next ten

Policy and regulatory environment

As the policy and legal framework naturally changes, how can firms, investors and manufacturers keep up to date with frequent policy shifts? Understand the direction and travel of policy and gain key insights from regulatory players.

Fire safety and risks

As we move towards long-duration storage the issue of fire safety and longevity naturally arises. How do battery developers, regulators and fire departments alleviate these problems and understand new technologies on the market?

Technology, innovation and automation

and storage are often used However, what



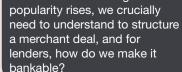
Asset management

As we transition to a carbonzero planet and today's initiatives begin to age, how do we plan, manage and maintain grid and ancillary services? As the collection of data and information becomes the cornerstone of renewable management, understand how

we can better manage the deployment of solar and wind projects.

Merchant models

With PPA's lifespan getting shorter and shorter, the solar market appears to be making a brisk turn to merchant modelling. As its



Tackling the supply chain crisis ESG has become the new

buzzword in the industry as investors and developers attempt to source raw materials and goods from renewable sources. As more projects sit in the pipeline, understand how developers, investors and contractors source and evaluate their supply chains and maintain confidence in achieving project deadlines.



Grid Congestion and deployment

To understand the evolution of the arid we must look how regulators are making policy conducive to the arid. In this session



we will look at investment in the grid and how developers are planning for the future.in energy storage grows.

An Amazing Display of Content!

Here are some of the sessions that took place over the two day event and the contributing speakers.

Keynote Panel: Charging Ahead in the Texan Energy Market

As the storage market heats up, the Lone Star State is certainly on a march of progress with it forecast to have as much as 1.400MW of capacity as of September 2021. For all its progress. it has however encountered problems such as the absence of a capacity market, financing challenges in merchant deals and freak weather patterns leaving its storage market unprepared for the worst. This session will delve into these thorny issues and how other states can learn from their developments.











Karl Meeusen Director – Markets. Legislative and Regulatory Policy Wärtsilä

Warren Lasher President Lasher Consulting

Joel Turkheimer VP of Market Operations Key Capture Energy

Woody Rickerson Vice President Grid Planning and Operations ERCOT

Luigi Ciavarella VP of Energy Storage RWE

Panel: Contracting and Financing Energy Storage Projects

The road to financing a project can sometimes be a murky journey, clouded in uncertainty. This session will provide in-depth analysis on the different contracts/financing solutions available for your project.



Dwavne Krpan Executive Director. Director of Origination

East Point Energy

Andrew Chen Suleman Khan Managing Director CEO CIT Group Inc Swell Energy

Panel: Unlocking the Potential of

Long-Duration Storage

As we begin to retire fossil fuel consumption and reliance, long-duration

energy storage is key to unlocking a comprehensive net-carbon zero grid.

Saurabh Anand Managing Director **Denham Capital** Management

Ted Sullivan Senior Director NTE Energy

Panel: Waves of Capital: Investor Appetite for Storage

Investors and lenders are particularly keen to enter the storage market. In 2021, the IEA reported that the US had already invested nearly \$2bn in battery storage deployment making up a third of the world's total investment value.



Oke McAndrews

Head of M&A and

Capital Markets

Clenera

Stephen Prince President Largo Clean Energy



Charley Grimston

Executive Chairman

Altelium





Michael

Pantelogianis

Head of Infrastructure

Investec



Dana Sands

CFO

Energy

Infrastructure

Partners

Patrick Norton Managing Director **Javelin Capital**



Shaheer Aziz Senior Director, Business Development Hvdrostor Association of California



Alexander Shoenfeldt CEO Cell Cube



Management

ESS Inc



Systems

Julia Souder Executive Director Long Duration Energy Storage



Tom Lueke Director Product





North America **Invinity Energy**

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Power Finance Nomura

Alain Halimi

Infrastructure and









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8Minute Energy			
ABB Inc			
Advanced Power Services (NA), Inc.			
Akin Gump	BYD		
Alexa Capital			
Altelium	Cali		
Ambri	Calp		
American Tower	Carl		
Amp Energy	_ Cas		
AMPT	Cas		
Antenna Group	CED		
Apeiron Energy	Cele		
Apex Clean Energy	Cell		
Ascend Analytics	Cha		
Ascend Elements	Che		
ATC	CIT		
Available Power	Citi		
Avana Capital	Clea		
Aypa Power	Clea		
Bank of America	Coh		
Bartech	Coll		
BASF	Con		
Berkeley Research Group	– Cop		
Black Mountain Energy Storage	Cota		
Blue Ridge Power			

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Enlighten Innovations Enovation Analytics Enguest Energy Solutions ERCOT ESA Solar Energy LLC ESS Inc. esVolta Euclid Power **EVLO Energy Storage** Evozyne, Inc. Federal Aviation Administration First American Fisher Associates Fluence Energy, LLC Fractal EMS Fractal Energy Storage Consultants General Infrastructure Georgia Power **GHA** Capstone Glidepath Goldman Sachs Gore Street Capital Green Powered Technology **Greengate Power** GreenPowerMonitor H.B. Fuller Hecate Grid LLC

Highfield Energy HMI Hodqson Russ Honeywell- Energy Storage Solutions Honeywell Xtralis HOS Resources LLC HUB International Hunt Energy Network Hyde Engineering Services **Hvdrostor** Hyundai Electric & Energy Systems Iberdrola ibV Energy Partners **IEP** Technologies Inaccess inBalance Indie Energy Ingenuity Ventures Investec Invinity Energy Systems J.L. Richards & Associates Limited Japan Electric Power Information Center, USA Javelin Capital Jema Energy **JERA** Renewables Johnson Controls Inc. Just Energy

Top Attending States: Texas • California • New York • Colorado • Massachusetts

Companies That Attended

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likola Power Corp
lomura
lorth American Development Bank
ITE Energy
OCI Solar Power, LLC.
On Energy Storage
Driden
Drmat
Drsted
Paloma Solar & Wind
Pan American Finance
papalote
Peak Land Services
Pearce Renewables
Penn State
Perfect Power LLC
Phoenix Contact
PineGate Renewables
Pivot Energy
Polaris Power Services LLC
Potentia Renewables
Powell Electrical Systems
Power Africa
Prologis
PSEG
V Hardware

Quanta Services
Quinbrook Infrastructure Partners
R Street Institute
Rabobank
RES
RRC Companies
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Rystad Energy
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Solargis Americas Inc.
Soltage
Solva Inc.
Spearmint Energy

Stat-X
Stem Inc.
Stryten Energy
Sumitomo SHI FW
Sunco International Inc
SunGrid
Sunrun
Sunup Solar Tech Services
Swell Energy
SWMCO
TBEA USA
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Utopus Insights

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Which Job Titles Attended?

Account Executive Applications Engineer Asset Manager Assistant Professor Associate Director Associate Director of Project Finance Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Asset Manager Assistant Professor Associate Director Associate Director of Project Finance Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Assistant Professor Associate Director Associate Director of Project Finance Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Associate Director Associate Director of Project Finance Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Associate Director of Project Finance Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Associate Product Manager BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
BDM- Power Generation Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Board Member Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Business Analyst Business Development Associate Business Development Director Business Development Engagement Project
Business Development Associate Business Development Director Business Development Engagement Project
Business Development Director Business Development Engagement Project
Business Development Engagement Project
Managar
Manager
Business Development Manager
Business Development Manager, ERCOT
Business Owner
CEO
CEO, Americas
CFO
Chairman
Chief Commercial Officer
Chief Operating Officer
Chief Revenue Officer
Civil Engineer
Co-CEO
Co-Founder and COO
Commercial Account Manager
Commodity manager
Communications & External Relations
Company Director
Consulting Engineer - Monitoring and Diagnostics
Controller & Director of Finance
C00
Counsel
СТО
Customer Marketing Manager
Demand Generation
Design Program Management
Development Manager

Dir. Product Management
Director
Director - Advisory Services
Director - Business Development
Director – Markets, Legislative and Regulatory
Policy
Director - Operations
Director - Structured Finance
Director Client Success
Director Energy Storage Development
Director ESS Development
Director of Business Development
Director of Business Development, Energy
Storage Division
Director of Business Development, Market
Operations
Director of Corporate Development
Director of Development
Director of energy markets
Director of Engineering
Director of Marketing
Director of Operations
Director of Origination
Director of Regulatory Affairs
Director of Regulatory and Legislative Affairs
Director of Renewables Engineering &
Construction
Director of Safety & Commissioning
Director of Sales
Director, Business Development - Generation
Management Services
Director, Business Growth
Director, Energy
Director, Energy and Electrical Systems
Director, Energy Storage and Electrical
Engineering
Director, Mergers and Acquisitions
Director, Sales & Marketing
Director, Sensors Business Unit
Distributed Energy Business Manager
Electrical Project Manager

Energy Data Specialist Energy Management Specialist Energy Storage Analyst Energy Storage Engineering Manager **Energy Storage Practice leader** Energy Storage Systems Sales Manager - SE United States & Caribbean Energy Strategist/P.G., TX & WY EPC Director **Estimator** Events, North America Exec Director, Infrastructure & Power Finance Executive Chairman **Executive Director** Executive VP **Finance Director** Financial and Market Analyst Financial Structuring Manager-Energy Founder and President Founder Director General Engineer General Manager General Manager, Global Proposal Management General Manager, Marketing & Comms, Americas Geographic Sales Manager Global Commercial Director Global Head of Utility Global Market Manager - Energy Solutions Global Marketing Director Global Operations Manager Group Manager Energy Head of Energy Storage Head of Global Sales Head of Infrastructure "Head of Infrastructure and Power Finance Americas. Managing Director" Head of Power Origination Head of Procurement Head of Product Head of Product Management

Head of Technology Strategy Head, Storage Development Innovation and Commercialization Manager Innovation Director Investment Associate Investment Principle Investment Research Key Account Manager Lead EES engineer M&A Manager Manager - Strategic and Global Accounts Manager Energy Storage Manager of Market Analytics Manager, Business Development Manager, Customer Success Manager, Development Manager, Enterprise Sales Manager, Structured Finance Manager, Technology Strategy Managing Director Managing Director Energy Transition Investments Managing Director, Business Development Managing Director, Energy Storage Managing Director-STEM Managing Partner Managing Partners, Business Development Manging Director Market Research Analyst and Project Support Market Specialist Marketing & Communications Marketing Director Marketing Manager Marketing Project Manager Mechanical engineer - thermal management National Energy Business Development North America General Manager North American Development. Executive Consultant **Operating Partner Operations Director**

Which Job Titles Attended?

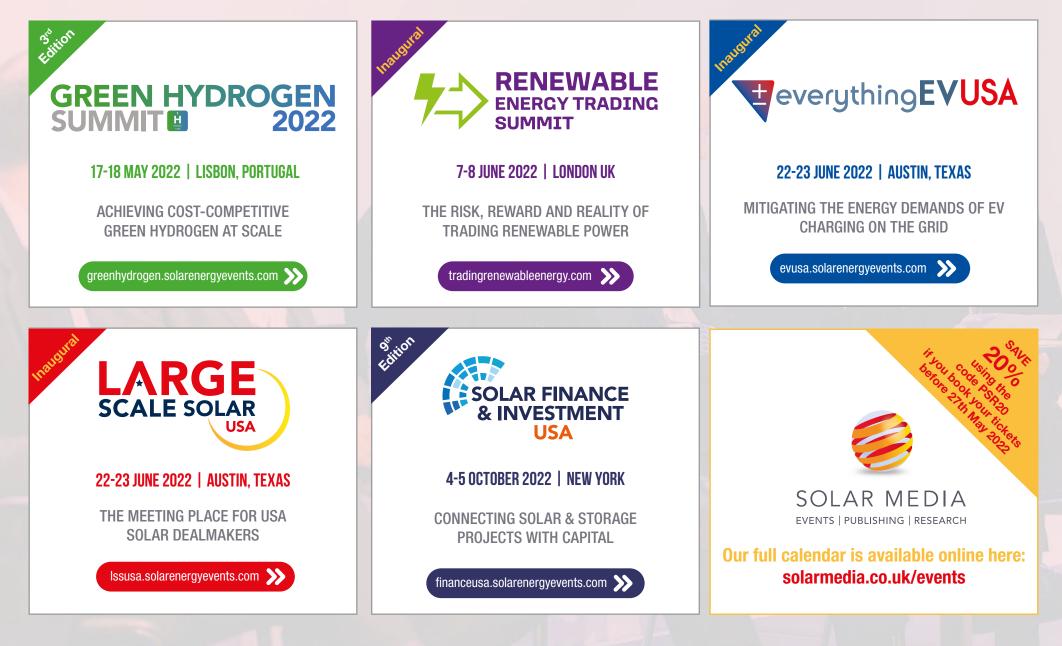
Operations Manager
Origination Strategy Manager
Owner
Partner
Policy Director
Policy Expert, Grid Energy Storage
President
President and CEO
President, VP NYS Manager
Principal
Principal – Technical Business Development
Principal & Chair of ERCOT Battery Energy
Storage Task Force
Principal Consultant
Principal Risk Engineer
Product Business Development Director
Product Manager
Product Specialist
Professor
Project Development Engineer
Project Engineer
Project Manager
Quantitative Researcher
Regional Manager, North America
Regional Sales Director
Regional Sales Executive
Regional Vice President
Regional Vice President Americas, Strategic Business Development
Renewable Development Project Coordinator
Renewables Director
Research Associate
Sales & marketing coordinator
Sales and Business Executive
Sales Business Development Manager
Sales Director
Sales Director - US West
Sales Engineer
Sales Executive
Sales Manager

Sector S	Storage Manager
	ccount Executive
Senior A	dvisor
Senior A	nalyst
	nalyst - Renewable Energy
Senior A	nalyst Innovation
Senior A	ssociate, M&A
Senior E	Business Development Manager
Senior C	Consultant
Senior C	Consultant -Energy Storage
Senior D	Director
Senior D Renewa	Director - Green Hydrogen Avangrid
	Director Development & Origination
	Director of Client Services
	Director of Delivery
	Director of Energy Storage
	Director of Market Development and Policy
	Director, Stored Energy Development
	Electrical Engineer
	Energy Systems Engineer
Senior E	
Senior F	
Senior N	
	Anager of Energy Storage
	Aanager Strategic Initiatives
Senior N	Anager, Business Development, Energy
	& Optimization
	Ianager, Energy Programs
Senior N	Aanager, Energy Storage Development
Senior N	Aanager, Storage BD
	Anaging Director, Global Energy &
	Tech Practice
	/larket Analyst
	Aarketing Manager Energy Storage &
Optimisa	
	/larketing Manager, ES&O
	Product Engineer
	Project Developer
	roject manager
Senior F	Proposal Engineer

Senior Reporter
Senior Researcher
Senior Vice President
Senior Vice President - Operations / Project
Execution
Senior Vice President Business Development & Sales
Solar Design Engineer
Solar Financing Division Head
Solar Practice leader
Sourcing Manager
Southwest District Manager
Sr Energy Storage Manager
Sr Vice President, Electrification
Sr. Account Executive
Sr. Customer Marketing Specialist
Sr. Development Engineer
Sr. Director - Energy Markets, Operations
Sr. Director, Business Development
Sr. Energy Storage Analyst
Sr. Engineering Manager
Sr. Manager Business Development & Project
Analytics
Sr. Mgr Finance and Sales, Solar Division
Sr. Project Manager
SR. VP of Business Development
Strategic Marketing and Corporate Ventures
Strategic Technology Planner
Studies Assitant Manager
Studies Engineer
Sustainability Specialist
SVP - Renewable energy
SVP North America
SVP of Products and Business Development
SVP Sales & BD
SVP, Growth
Talent Acquisition Specialist
Technical Business Development
Technical Fellow
Technical Sales Engineer

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In-depth analysis on important topics and industry developments, covering notable projects, business models, policies and regulations, technical innovations and more, makes the website, with a dedicated team of full-time editors and writers located around the globe, an essential resource for anyone within the energy storage value chain.

Eos signs deal for 'up to 500MWh' of zinc battery storage for Texas projects

By Andy Colthorpe March 10, 2022 Hamericas, US & Canada Mar Grid Scale I Business, Products



How other states can replicate California and Texas' storage successes

By Cameron Murray March 10, 2022

🌐 Americas, US & Canada 🛛 🕍 Grid Scale 🛛 🛍 Market Watch, Policy, Technology



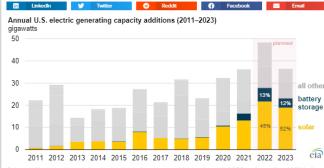
There is still plenty of educating decision-makers on storage's place on the grid to do to follow in the footsteps of early-movers like California and Texas, and it goes beyon

Majority of 10GW battery energy storage coming online in next two years in US paired with solar PV

By Andy Colthorpe

March 10, 2022

I Americas, US & Canada 🛛 🕍 Connected Technologies, Grid Scale 📲 Market Watch



Solar and battery storage dominate planned capacity additions through 2023, with another 10GW of battery storage. Image: US EIA.

From 10GW of battery storage expected to be deployed in the US over the next two years, more than 60% will be installed with solar PV, according to the US Energy Information Administration (EIA)

The EIA conducts surveys to collect statistics on existing and planned generators and associated ent at power plants, of 1MW or more nameplate capacity. The independent group is an agency of

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The three things the US needs to catch up with Europe's battery gigafactory charge By Cameron Murray March 9, 2022



olmatik, Eaton announce energy ttery and system factories in U rucial role' in energy security

storage load shifting on to 50 n CAISO grid; operator eyes S

nark data, what does the US need to do to keep up as both race to pro

ay (8 March) agreed that Europe is far ahead of its Atlantic neig ing - despite some recent forecasts pegging the two markets' 2030 ed capacity figures closely. So what needs to he

Creating a mindset that says it's possible

The good news is that the current US administration is builtsh on ge n the the US Department of Energy's Loan Programs Office



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