

13th
ANNUAL

MARKET DEVELOPMENT FORUM 2022

CESA 

CALIFORNIA ENERGY STORAGE ALLIANCE

MARCH 1 - 2, 2022

DAVID BROWER CENTER
2150 ALLSTON WAY
BERKELEY, CALIFORNIA

THE DECADE OF EXECUTION



STORAGEALLIANCE.ORG



WELCOME TO THE 13TH ANNUAL MARKET DEVELOPMENT FORUM & WORKSHOPS: “THE DECADE OF EXECUTION”

We gather at a time of momentous change in our industry! Recent exponential growth of grid-connected energy storage in California — a nearly 8-fold increase from 500 MW operational in the summer of 2020 to nearly 4,000 MW by the end of last year, alongside newly issued solicitations this year exceeding 1,700 MW – shows that storage is truly becoming a mainstream grid resource. Reliability needs, however, remain acute on California’s grid, and continued large amounts of storage year-over-year will be needed to ensure reliability.

The California Public Utilities Commission estimates that the **State will require approximately 14 GW of storage by 2032**, and we clearly have a lot of work in front of us. Will the proper amounts and portfolios of storage be online in time?

In CESA, we refer to this question and the 10-year expansion of energy storage capacity as our “storage decade

of execution.” The stakes of this work are high, and the clock is ticking. Already, summer 2022 looms, and drought and wildfire conditions seem likely. Extreme weather, global supply chain constraints, and other challenges may further push our grid toward its limits.

The Market Development Forum and Workshops focus us on how to ensure successful execution on our energy storage needs. Your help and participation are needed! Working together, we believe we can effectively and efficiently advance California’s energy transition, while also protecting the health and well-being of our nearly 40 million residents.

The **strength of CESA’s 100+ member network** — developers, technology providers, integrators, strategists, advisors and attorneys, financiers, service providers, and more — is our greatest asset as we work together to support our industry’s next phase

of growth. On behalf of the entire CESA team, **thank you for your engagement and your partnership.** We have no doubt that our industry’s best and brightest days are yet to come.

Onward!



ALEX MORRIS
EXECUTIVE DIRECTOR
California Energy Storage Alliance



JIN NOH
POLICY DIRECTOR
California Energy Storage Alliance

CESA MISSION

The mission of CESA is to make energy storage a mainstream resource to advance a more affordable, efficient, reliable, safe and sustainable electric power system for all Californians.



Founded in 2009, CESA is a non-profit membership-based advocacy group committed to advancing the role of energy storage in the electric power sector through policy, education, outreach and research.



CESA is technology and business-model neutral and supported solely by the contributions and coordinated activities of its members.



CESA membership includes technology manufacturers, project developers, systems integrators, professional services firms, and other leaders from across the energy storage marketplace.

THANK YOU TO OUR GENEROUS 2022 SPONSORS

MARKET DEVELOPMENT FORUM



GOLD SPONSOR

**RECURRENT
ENERGY**

A subsidiary of Canadian Solar

RECEPTION SPONSOR



SILVER SPONSORS

PRE-FORUM WORKSHOPS



GOLD SPONSOR

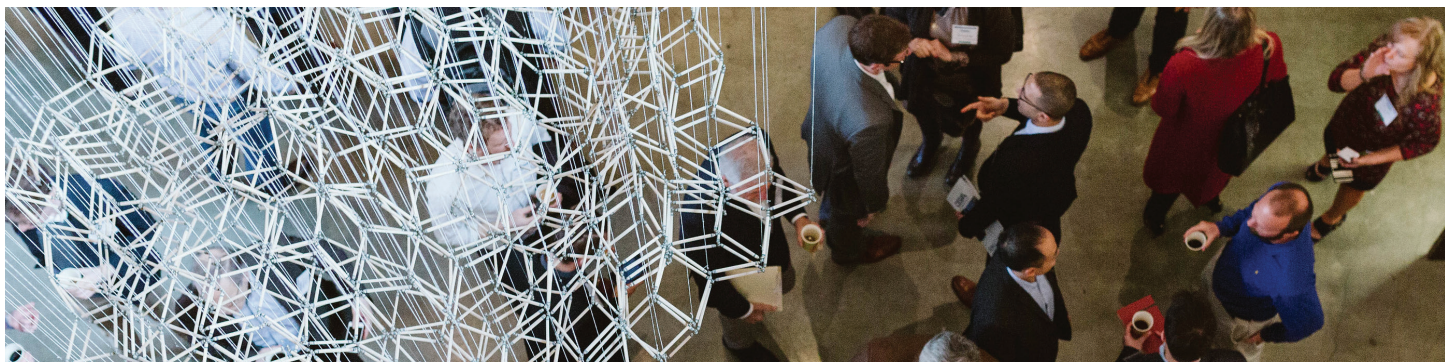


SILVER SPONSORS

DAY 2 PROGRAM – MARKET DEVELOPMENT FORUM

TIME	SESSION	SPEAKERS
8:00 - 9:00 AM	Networking Breakfast	
9:00 - 10:00 AM	Welcome & Introductions All attendees may provide introductions.	Richard Brody VP of Business Development – Quidnet CESA Board Chair Alex Morris Executive Director – CESA
10:00 - 10:30 AM	A Decade of Execution – Learning from the Past Best practices for fast execution based on RPS and state leadership during this era.	Alex Morris Executive Director – CESA Michael Picker Former California Public Utilities Commission President
10:30 AM - 11:00 AM	Networking & Coffee Break	
11:00 AM - 12:15 PM	Breaking Free Fixing the interconnection logjam and aligning resource development with planning.	Dana Cabbell Director of Integrated System Planning – Southern California Edison Siva Gunda Commissioner, Vice Chair – California Energy Commission Neil Millar Vice President – Interconnection and Transmission Planning, California Independent System Operator Pete Skala Director of Electric Supply, Planning, and Costs – California Public Utilities Commission Julia Souder President – JAS Energy Consulting <i>Moderator: Alex Morris – CESA</i>
12:15 - 1:30 PM	Networking Lunch David Brower Center Gallery	
12:45 - 1:30 PM	Optional Lunch Breakout Sessions Charting a High Distributed Energy Resources Future <i>David Brower Center Kinzie Room</i>	Gabe Petlin Supervisor, Grid Planning and Reliability Section, Energy Division – California Public Utilities Commission
	CEC Long-Duration Technology Commercialization Program <i>David Brower Center Goldman Theater</i>	Erik Stokes Deputy Division Chief, Energy Research and Development Division – California Energy Commission

TIME	SESSION	SPEAKERS
1:30 - 2:45 PM	<p><i>Rethinking Reliability, Rebuilding the Right Fleet</i> Planning for a high-storage future in the face of extreme weather events and aligning IRP and RA.</p>	<p>Peter Griffes Chief, Comprehensive Market Design – PG&E</p> <p>Michele Kito Interim Program Manager, Electric Planning and Market Design Branch – California Public Utilities Commission</p> <p>Partha Malyadkar Principal of Resource Adequacy and Infrastructure Policy – CAISO</p> <p>Ric O’Connell Executive Director – Gridlab</p> <p><i>Moderator: Jim Noh – CESA</i></p>
2:45 - 3:15 PM	<p><i>Networking & Coffee Break</i></p>	
3:15 - 4:00 PM	<p><i>Managing Risk in an Evolving Market</i> Is risk and reward balanced and clear in storage development? Where are uncertainties high and what changes should be considered, if any? This session will focus on market, performance, regulatory, and other risks.</p>	<p>Sara Graziano Partner – SER Capital Partners</p> <p>Carrie Bentley CEO – Gridwell Consulting</p> <p><i>Moderator: Alex Morris – CESA</i></p>
4:00 - 4:30 PM	<p><i>Keynote Session</i> Fireside chat with Elliot Mainzer from the California Independent System Operator with time for audience Q&A.</p>	<p>Elliot Mainzer CEO and President – California Independent System Operator</p>
4:30 - 5:00 PM	<p><i>Closing Remarks</i> Conclusion with agreement on next steps to enable “The Decade of Execution.”</p>	<p>Alex Morris Executive Director – CESA</p>
5:00 - 8:00 PM	<p><i>Networking Reception</i> <i>Cornerstone Restaurant (2367 Shattuck Ave)</i></p>	<p>SPONSORED BY RECURRENT ENERGY</p>



CESA BOARD OF DIRECTORS



CESA GENERAL MEMBERS



CESA STARTUP MEMBERS

- | | | | |
|---|------------------------------|-----------------|-------------------------|
| Altect | Crossover Partners | Franklin WH | Redflow |
| American Fire Technologies | Chelion America | Gridwiz | Reimagine Power |
| Antora Energy | ELSYS | GSR Energy | Solas Energy Consulting |
| Aquifer Based Hydroelectric Systems LLC | Energport | H2, Inc | Storworks |
| Ariya LLC | Energy Dome | Li-ion Tamer | Swell Energy |
| B2U Storage Solutions | Energy Safety Response Group | Nostromo Energy | Villara Energy Systems |
| Better Energies | EnerSmart Storage | Nuvation | W.L. Gore & Associates |
| Connect California | Enlighten Innovations | Polyjoule | Zelos |
| | | RAW Energy | Zitara Technologies |