



CESA  **WEEK**
CALIFORNIA ENERGY STORAGE ALLIANCE | FEBRUARY 25-27

DAVID BROWER CENTER
2150 ALLSTON WAY
BERKELEY, CA



2020

"THE NEXT 10 YEARS"



WWW.STORAGEALLIANCE.COM/EVENTS



WELCOME TO CESA WEEK 2020: "THE NEXT 10 YEARS"



ALEX MORRIS
EXECUTIVE DIRECTOR
California Energy Storage Alliance

Welcome to CESA Week and the 11th Annual Market Development Forum, a convening of CESA members, policy makers, regulators, environmental advocates, utilities, Community-Choice Aggregators, grid operators, and more. Each year we to come together to

thoughtfully and collaboratively develop the California energy storage market, and in doing so, support the state's climate and electric system goals.

This year, we take a long-term focus and consider "The Next Ten Years." From 2020 to 2030, California's grid will evolve to a system powered primarily by clean energy resources and supported by energy storage. Energy storage solutions are broadly expected to play key roles in reliability, renewables integration, local area support, fire resiliency, microgrids, and more, and it will take massive amounts of energy storage to get there. Indeed, the CPUC modeled the need for at least 10,000 MW (Integrated Resources Plan) of deployed energy storage over the next ten years – a staggering amount.

Additionally, as the industry matures over the next ten years, storage projects and industry members will expand their focus beyond project development to long-term operations. Owners and operators will have to contend with and master vital functions including safe long-term

operations, ongoing market participation, scheduling, maintenance, cyber-security, and more. California will want to ensure market products and pricing accommodate the operational needs of the storage fleet as it works to meet the needs of a rapidly evolving grid.

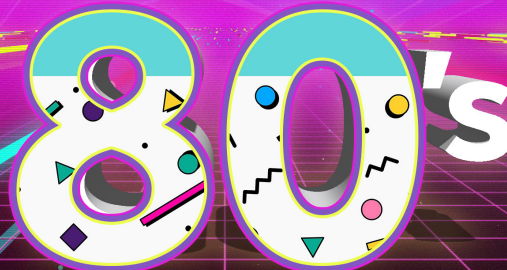
Planning for the future is hard, but at CESA we believe what you focus on is what you get. We are thus focused on how we can incorporate energy storage in building the low carbon grid of the next 10 years, and a no-carbon grid beyond that. I am confident that we will get there with the assembled brains and hearts in this room.

Thank you for your participation, input, and enjoyment of our CESA Week Events. We especially thank our sponsors, speakers, and CESA members for their leadership, dedication, and support.

Onward!

C E S A P R E S E N T S

BACK TO THE FUTURE



PARTY

WEDNESDAY | FEBRUARY 26 | 6-9 PM | REVIVAL BAR

CESA OVERVIEW

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, the California Energy Storage Alliance (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 membership includes technology manufacturers, project developers, systems integrators, professional services firms, and other leaders from across the energy storage marketplace. CESA is technology and business-model neutral, and supported solely by the contributions and coordinated activities of its members.

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MARKET DEVELOPMENT FORUM 2020 SPEAKERS



JASON BURWEN
Vice President
Energy Storage Association



ERIN CHILDS
Manager
Strategen



NORA HAWKINS
SGIP Program Manager
California Public Utilities
Commission



VICKEN KASARJIAN
Chief Operating Officer
Marin Clean Energy



CLARK KELLOGG
Professor
UC Berkeley
Haas School of Business



SHANA LAZEROW
Legal Director
Communities for a Better
Environment



CARLA J. PETERMAN
Senior Vice President
Regulatory Affairs
Southern California Edison



GABE PETLIN
Grid Reliability & Planning
California Public Utilities
Commission



LIANE M. RANDOLPH
Commissioner
California Public Utilities
Commission



JASON RONDOU
*Director, Clean Grid LA
Strategy Division*
Los Angeles Department of
Water & Power



MARK ROTHLEDER
Vice President
Market Policy & Performance
California Independent System
Operator



JENEA SCOTT
Vice Chair & Commissioner
California Energy Commission



HENRY STERN
Senator
California Senate



**MONA TIERNEY
LLOYD**
Senior Director
Western Regulatory Affairs
Enel X North | CESA Board
Chairperson



FERNANDO VALERO
*Director of Advanced
Clean Technology*
San Diego Gas & Electric



BETH VAUGHN
Executive Director
California Community Choice
Association

MARKET DEVELOPMENT FORUM SCHEDULE

TIME	SESSION	SPEAKERS
8:00 - 9:00 AM	<i>Networking Breakfast</i>	
9:00 - 10:00 AM	<i>Welcome, Introductions, and Ground Rules</i>	<p>Alex Morris Executive Director, CESA</p> <p>Mona Tierney-Lloyd Senior Director, Western Regulatory Affairs, Enel X North</p>
10:00 - 10:30 AM	<p><i>Breathtaking Opportunities Disguised as Insoluble Problems</i></p> <p>An academic assessment of where grid-related storage is in the arc of its market development, and where it could go.</p>	Clark Kellogg Professor, UC Berkeley, Haas School of Business
10:30 - 11:00 AM	<i>Networking Coffee Break</i>	
11:00 - 11:30 AM	<p><i>The Calculus of 6 + Hours Storage = ?</i></p> <p>Hear Los Angeles Department of Water & Power decision calculus for long-duration, pump-hydro, and hydrogen storage solutions for meeting clean energy needs.</p>	Jason Rondou Director of Clean Grid LA Strategy, Los Angeles Department of Water & Power
11:30 - 12:15 PM	<p><i>Beyond Pilot: Diversity or All-Source Solicitations for 6+ hour Storage</i></p> <p>The state should explore and procure diverse durations, and perhaps types, of storage. When, by whom, and how should this occur?</p>	<p>Janea Scott Vice Chair & Commissioner, California Energy Commission</p> <p>Jason Burwen Vice President, Energy Storage Association</p> <p>Gabe Petlin Grid Reliability & Planning, California Public Utilities Commission</p> <p>Erin Childs Manager, Strategen</p> <p>Alex Morris Executive Director, CESA</p>
12:15 - 1:10 PM	<p><i>Luncheon with Break-Out Groups</i></p> <p>Tamalpais Room, 2nd Floor: "Planning the Future" Focused lunch discussion break-outs with option of two topics:</p> <ol style="list-style-type: none"> Resiliency: How California can assign a value to resiliency. Letter from the Future: In 2030, California has exceeded its 60% renewable goals with the help of energy storage. This is how we did it. <p>Hazel Wolf Gallery, 1st Floor: "Planning the Present" Networking lunch</p>	

TIME	SESSION	SPEAKERS
1:10 - 1:20 PM	<i>Reflections: Valuing Resiliency</i>	Lunch Breakout Groups share their ideas
1:20 - 1:45 PM	<i>Resiliency: What it Means to the State</i> Hear of Sacramento's considerations and the real-world effects of fires and Public Safety Power Shutoffs.	Senator Henry Stern California State Senate
1:45 - 2:30 PM	<i>We Want Resiliency and We Want it Now!</i> Design, explore, and promote rapid adoption of storage-enabled resiliency solution by identifying and resolving barriers, identifying market accelerators, and addressing equity.	Vicken Kasarjian Chief Operating Officer, Marin Clean Energy Shana Lazerow Legal Director, Communities for a Better Environment Nora Hawkins SGIP Program Manager, California Public Utilities Commission Fernando Valero Director of Advanced Clean Technology, San Diego Gas & Electric Jin Noh Policy Manager, CESA
2:30 - 3:00 PM	<i>Networking Coffee Break</i>	
3:00 - 3:40 PM	<i>Electrification and Energy Storage: A Vision of the Future by SCE</i>	Carla Peterman SVP Regulatory at Southern California Edison
3:40 - 3:50 PM	<i>Reflections: Letters from the Future</i>	Lunch Breakout Groups share their letters
3:50 - 4:45 PM	<i>10 Years Out: Growing Pains, Reliability and Resiliency Planning for 2030</i> Learn key goals and needs for our electric systems and how storage can take on more roles for ensuring a reliable grid to benefit all Californians.	Liane Randolph Commissioner, California Public Utilities Commission Mark Rothleder Vice President, California ISO Beth Vaughan Executive Director, California Community Choice Association Alex Morris Executive Director, CESA
4:45 - 5:15 PM	<i>Wrap-Up and Reflection</i>	Alex Morris Executive Director, CESA
6:00 - 9:00 PM	<i>Back to the Future: 80's Bash! A Networking Party with Music, Dinner & Dancing</i>	Located at Revival Bar + Kitchen, 2102 Shattuck Avenue, Berkeley, CA

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