

4th ANNUAL



Energy Storage

SUMMIT

26-27 February, 2019

The Victoria Park Plaza, London

THE LEADING SUMMIT SUPPORTING DEPLOYMENT OF ENERGY STORAGE ACROSS EUROPE

350+
delegates

40+
expert
speakers

15+
case
studies

20+
Countries
Represented

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The Energy Storage Summit

The largest European downstream energy storage conference, returns to London on the 26th – 27th February for its 4th year. The Summit is renowned for its quality, breadth and expertise, featuring an all-encompassing range of strategic and technical sessions.

This eco-system event is filled with developers, financiers, utilities, networks, aggregators and C&I energy users all keen to hear about the state of the market, partnership opportunities and the future evolution of energy storage across Europe.

The Energy Storage Summit has fast established itself as a must attend industry gathering, not just in the UK, but globally. This sell-out conference hosted over 360 delegates in the Victoria Park Plaza in London in 2018 and returns again in 2019 on the 26-27 February even bigger and better!

KEY THEMES



New Business Models & Strategies



Policy & Regulation



Sector Focus: FTM



Finance & Investment



Sector Focus: C&I



Technology Adoption



New Revenue Streams



Sector Focus: Co-located Storage



E-Mobility

“ You have proven again that this is the leading conference in the UK energy storage sector.

Mark Henderson, GRIDSERVE Sustainable Energy Ltd



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EXHIBITORS:

Envirotech **g2 ENERGY** **HIGHVOLTAGE** **Solar Turbines** **xelectrix**

SUMMIT PARTNERS:

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Who attends the Energy Storage Summit?

48% 

of attendees from outside of the UK

15% 

C-Level audience

63% 

Decision makers

60% 

Buy-side audience



COMPANY TYPES

-  Manufacturers
-  Financiers
-  Energy Managers
-  Developers
-  Utilities
-  Public Sector
-  EPCs
-  Large Energy Users
-  Landowners
-  Technology providers

JOB FUNCTION

-  CEO/ Managing Director
-  Project management
-  Engineering
-  Management / Dept Heads
-  Investment/Finance
-  Business Development
-  Strategy

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Hear from industry leaders...



Roberto Castiglioni
Investment Director
INGENIOUS



Harry Vickers
VP
GREEN INVESTMENT GROUP



Mark Simon
Managing Director
EEL POWER



Steve Shine
Chairman
ANESCO



Mark Henderson
CIO
GRIDSERVE



Matthew Bolton
COO
PIVOT POWER



Lily Coles
Commercial Operations Director
ANESCO



Jon Cape
Managing Director
IPOWER



Faisal Hussain
Director
HEIS SCHEME



Jeremy Martin
Energy and Sustainability Manager
SOUTHEND ON SEA COUNCIL



Dr. Claas Helmke
Partner
WERMUTH ASSET MANAGEMENT



Graeme Cooper
Project Director, Electric Vehicles
NATIONAL GRID



Vincent de Rul
Energy Solutions Sales Director
EDF



Richard Molloy
Business Development Manager –
Energy Storage
EATON



Matt Clayton
Managing Director
AURA POWER



Alexander Starchenko
Managing Partner
FIRST IMAGINE



Andrew McKenna
Commercial Manager - Flexibility
NORTHERN POWER GRID



James Basden
Founder Director
ZENOBE ENERGY



Stephan Marty
General Manager - Energy
Storage & International DR
KIWI POWER



Gauthier DuPont,
Director Power Business
Batteries
NGK EUROPE



James Watson,
UK POWER NETWORKS

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Hear from industry leaders...



Quentin Scrimshire
Head of Energy Storage
KIWI POWER



Richard Walsh
Solar & Energy Storage Lead
WGL



Devrim Celal,
CEO
UPSIDE ENERGY



Dr Marek Kubik
Market Director
FLUENCE ENERGY



Sam Harden
Senior Business Developer for
Battery Energy Storage
INNOGY



Mark Meyrick
Head of Smart Grids
ECOTRICITY



Semih Oztres
Director of Business
Development
GREENSMITH



Hëdd Roberts
Head of Customer Solutions
NATIONAL GRID



Lauren Cook
Senior Analyst
SOLARMEDIA



Amit Oza
MD and Head of Battery Sales,
BELECTRIC



Darren Riva
Director
CAPITAS FINANCE



John Pollard
Project Director Energy Storage
ESB



Bruce Huber
Managing Partner
ALEXA CAPITAL



Maria Connolly
Partner
TLT



Steve Wheeler,
Co-founder
ENVIROTECH



Sally Fenton
Project Leader
BEIS



George Dudley
International Engagements
Manager
CNESA



Robert Hughes
UK Director
ENERGY POOL



Chris Hewett
CEO
STA



Stephane Tetot
Director
BLACKROCK



Ed Simpson
Investment Director
GRESHAM HOUSE



Vikas Ahuja
Energy Projects manager
NHS TRUST



Hannah Staab
Principal Solar & Energy
Storage Consultant
NATURAL POWER



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Western Power



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Enel X

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Day One: Tuesday 26th February 2019

8.30 Registration and coffee

9.00 Chair's Opening Remarks

9.10 2019 STORAGE MARKETPLACE: BM, SNAPS, CM AND FLEXIBILITY ACCESS

- The shift to day ahead: what does it mean for the industry?
- What are the regulations surrounding the residential market and its access to the flexibility marketplace?
- How is National Grid Future Energy scenarios accounting for flexibility in its projections?
- Does Ofgem envision residential consumers having a route to market to grid services?
- Brexit and electricity market: what are the potential backlashes that may affect the energy storage marketplace
- How removing MIP for solar in Europe impacts the energy storage market
- Ofgem announcement regarding behind-the-meter access from different stakeholders
- The new face of the capacity market? How will hybrid projects be treated moving forward?
- Reviews of penalties for non-dispatch
- Definition of storage within the electricity licence:
 - o What are the implications for energy storage assets if they need purchase generation licenses?
 - o Is National Grid thinking of addressing the oversubscription of frequency response? Is National Grid looking to redirect some of that value to other services and if so where do they perceive that value lies?
- SNAPs updates and timelines

BEIS | Sally Fenton, Project Leader

9.40 THE ROLE OF STORAGE ON THE FUTURE ENERGY NETWORK

- How National Grid Electricity Transmission is changing
- Adapting for the future by addressing distinct new needs
- The Charging Challenge

NATIONAL GRID | Hêdd Roberts, Head of Customer Solutions 

10.10 HOW ARE NETWORKS PLANNING FOR FLEXIBILITY?

This session will uncover DNO strategies around:

- The digitisation of the electricity system
- Procuring flexibility through platforms
- RII0-2 Business plans
- EVs impact on the networks and repercussion on future planning
- Providing flexibility (e.g. non-form connection and curtailment)
- The advent of the digital energy customer
- Simplifying connection processes
- The impact storage will have on energy flows, power quality and load balancing
- Grid application locational trends
- How will the DNO to DSO transition affect strategy?

NORTHERN POWER GRID | Andrew McKenna, Commercial Manager - Flexibility
WESTERN POWER | Senior Representative
NATIONAL GRID | Graeme Cooper, Project Director, Electric Vehicles

11.00 Networking refreshment break

11.30 HOW TO THRIVE IN AN EVERCHANGING MARKETPLACE

Every few months regulations change, access to new services/products is granted and restricted to certain technology and types of projects. There are plenty of projects on sale, but prices are too high, and a lot of projects remain on the market.

How does a company cope with updating its strategy that often?

Join this session to find out how the entrepreneurs in this space are navigating these difficult waters and futureproofing their business with sustainable business models and strategies.

Moderator: TLT | Maria Connolly, Partner
ANESCO | Steve Shine, Chairman
GRIDSERVE | Mark Henderson, CIO
PIVOT POWER | Matthew Bolton, COO



Day One: Tuesday 26th February 2019

12.30 PRESENTATION: INTERNATIONAL CASE STUDY: SOUTH AFRICA

- Overview of Microgrids
- Wadeville Case Study (South Africa)
- An opportunity for the UK

EATON | Richard Molloy, Business Development Manager – Energy Storage, Eaton

13.00 NATIONAL GRID PRIVATE LUNCH by invitation only

nationalgrid



Chair opening remarks

GREEN INVESTMENT GROUP | Harry Vickers, VP

14.05 WHY IS CO-LOCATION SUSTAINABLE

- a) Co-location alongside any generation, whether renewables (PV, wind etc), reactive power (gas, diesel gensets) or other power generation;
- b) Co-location behind-the-meter, especially for C&I applications taking advantage of grid connectivity as well as demand-side benefits or new services such as EV charging

What are the considerations for co-location on:

- The differing power-vs.-energy applications
- Power-centric Li-Ion batteries vs. energy-centric flow
- Legal structuring so as not to jeopardise RO accreditation for renewable generation
- The size of the new-build vs. retrofit market for co-location alongside grid-connected generation in 2019 and in two years from then. How will this compare to the behind-the-meter market – for C&I and for residential?

NORTHERN POWER GRID | Andrew McKenna, Commercial Manager - Flexibility

NATURAL POWER | Hannah Staab, Principal Solar & Energy Storage Consultant

BELECTRIC | Amit Oza, MD and Head of Battery Sales,

ZENOBE ENERGY | James Basden, Founder Director

14.50 PRESENTATION: A MANUFACTURER VIEW ON THE FUTURE OF ENERGY STORAGE



15.10 PRESENTATION: INTERNATIONAL CASE STUDY: USA

- Review of project economics
- Design issues and flexibility considerations
- Installation and planning
- Lessons learnt

GREENSMITH | Semih Oztreves, Director of Business Development



15.30 Networking refreshment break

16.00 C&I Market Segment

a) Large blue chip companies energy storage projects

b) SMEs energy storage projects

c) Standalone vs. collocated to different types of generations

- What is the role of arbitrage in the future revenue stack?
- Is there a way to increase standardisation within revenue stack and documentation?
- How to cater to the SME space and deal with lower credit score contracts
- Industrials' strategies to manage peak network costs
- What is the appetite to participate in DSR: which market segment are they already active in and what are the new ones they are looking to enter?
- What is the contract length they are comfortable with for energy storage deals and what is it dependent on?
- How important is power quality?
- How much flexibility can you really offer- dealing with inflexible loads and understanding the potential
- How to best manage your relationship with aggregators

ENVIROTECH | Steve Wheeler, Co-Founder

EDF | Vincent de Rul, Energy Solutions Sales Director

NHS TRUST | Vikas Ahuja, Energy Projects manager

17.00 BETWEEN COST OF CAPITAL AND BANKABILITY

This panel of investors and financiers will discuss:

- What are the most common revenue stacks that come across their desks?
- Whether they are ready to back longer duration batteries
- What types of projects would they be willing to consider?
- The role of insurance and underwriters
- Asset finance vs project finance vs vendor finance
- Do you consider degradation as CAPEX?
- How do you spread out the cost of the battery over the lifetime?
- How flexible is the capital available?
- The BM: how does it change your perception of risk?
- How do you build a revenue stack: does it all start with CM?
- What are the new risks investors perceive?
- Asset finance, project finance or 100% equity?

SUSI PARTNERS | Natalia Eisele, Investment Manager

INGENIOUS | Roberto Castiglioni, Investment Director

CAPITAS FINANCE | Darren Riva, Director

EEL POWER | Mark Simon, Managing Director

GRESHAM HOUSE | Ed Simpson, Investment Director

BLACKROCK | Stephane Tetot, Director

18.00 Networking drinks reception

19.30 Networking Dinner

Day Two: Wednesday 27th February 2019

8.30 Re-registration & coffee

9.00 Chair's Opening Remarks

ALEXA CAPITAL | Bruce Huber, Managing Partner

9.10 WHAT DO UTILITIES AND OIL & GAS COMPANIES HAVE IN STORE FOR THIS YEAR?

- How are Oil & Gas companies planning their entrance into the energy storage market?
- How will they be looking to position themselves?
- Manufacturing, Development, Ownership, Flexibility and Trading: sector analysis
- In-housing vs. partnerships vs. M&A: what strategies are utilities and Oil & Gas companies leaning towards?
- European utilities' plans for 2020
- Where do utilities and Oil & Gas companies see opportunity for collaboration?
- How are they building a European-wide strategy?

WGL | Richard Walsh, Solar & Energy Storage Lead

ENEL X | Senior representative

ESB | John Pollard, Project Director Energy Storage

INNOGY | Sam Harden, Senior Business Developer for Battery Energy Storage

ECOTRICITY | Mark Meyrick, Head of Smart Grids

10.00 THE NUANCES OF TRADING FLEXIBILITY

- DSR, storage and scale: what is achievable and how will the market look in 5 years?
- How are you updating your offering/strategy based on new National Grid products?
- Some aggregators are looking to own energy storage others are looking to sell services - what are the different strategies?
- Real-time data showdown - what does this mean to a potential customer? Will they understand what you're doing here?
- Repower, augment or let it degrade? Best practice for owner/operators.
- How can assets be designed for revenue stream agility?
- How do you operate energy storage with O&M issues in mind?

KIWI POWER | Stephan Marty, General Manager - Energy Storage & International DR

ENERGY POOL | Robert Hughes, UK Director

NATIONAL GRID | Senior Representative

FLUENCE | Dr. Marek Kubik, Market Director

11.10 Networking refreshment break

11.30 TECH SHOWDOWN SESSION

This session will be a series of short technology pitches and followed by a joint Q&A

- What will be the technologies leading the way
- What are the technologies with the best commercialization options
- What are compelling investment cases
- What are the applications each technology is most suited for?
- What are the geographies each technology is best placed to service?

NGK EUROPE | Gauthier DuPont, Director Power Business Batteries

WERMUTH ASSET MANAGEMENT | Dr. Claas Helmke, Partner

This session is reserved for technology providers if interested get in touch with marketing@solarmedia.co.uk

12.20 KEYNOTE: ENERGY IS GOING DIGITAL: WHAT DOES THAT MEAN FOR YOU?

All the verticals of the energy and electricity sector are currently undergoing a process of digitisation that will cause profound changes to the sector.

- What role will cybersecurity play in the flexibility space?
- How does a more engaged customer base impact trading flexibility? What are the tech solutions that will get us there?
- Energy-as-a-service
- What are the pathways to make all assets digital? How then can value be extracted from this process?
- AI, blockchain and smart contracts: which areas of the industry will they disrupt most?

UPSIDE ENERGY | Devrim Celal, CEO

FIRST IMAGINE! VENTURES | Alexander Starchenko, Managing Partner

13.00 Networking Lunch break

Day Two: Wednesday 27th February 2019

Chair's opening remarks

STA | Chris Hewett, CEO

14.00 PRESENTATION: SIZING THE UK MARKET OPPORTUNITY

SOLARMEDIA | Lauren Cook, Senior Analyst

14.20 THE REVISED FRONT-OF-THE-METER BUSINESS MODEL

- When will the market reach saturation?
- How to access and deal with the BM
- The evolving role of trading
- Land and grid: how much is too much?

KIWI POWER | Quentin Scrimshire, Head of Energy Storage

ANESCO | Lily Coles, Commercial Operations Director

15.10 CHINA'S ROLE IN THE ENERGY STORAGE INDUSTRY AND WHAT OPPORTUNITIES IT PRESENTS FOR FOREIGN COMPANIES

CNESA | George Dudley, International Engagements Manager

15.30 Networking refreshment break

16.00 ENERGY STORAGE IN THE PUBLIC SECTOR: ADDRESSING THE MARKET OPPORTUNITY

- Selection of projects alongside different councils
- Building a renewed energy strategy
- Prioritizing market segments within the public spa
- What are the key barriers to overcome?
- Holistic approaches to renewables generation

IPOWER | Jon Cape, Managing Director

HIESSCHEME | Faisal Hussain, Director

SOUTHEND ON SEA COUNCIL | Jeremy Martin, Energy and Sustainability Manager

16.40 Conference Adjourns



The Visitor Experience



CASE STUDY LED AGENDA

Hear leading case studies from your peers that outline successful deployments and projects in the Energy storage sector.



VENDOR INSIGHTS

Learn directly from leading infrastructure and technology companies at the forefront of energy storage.



KEYNOTES

Listen to industry leaders and disruptors as they outline the sectors key challenges, barriers and solutions across the energy storage space.



INDUSTRY EXPERT BRIEFINGS

During conference breaks, meet leading experts, involved in the future of energy storage across the UK and Europe.



1-2-1 MEETINGS

Arrange meetings and strengthen existing relationships or start new business alliances with those who can help steer your energy storage journey.



NETWORKING DRINKS RECEPTION

After a hard days work, network with your peers and potential partners in an informal setting over drinks and canapés at the end of day 1 of the event.



PRIVATE GALA DINNER

Upgrade your ticket and join your peers for a fun filled night of networking and fine dining. Enjoy an exclusive 3-course dinner, catered by the Park Plaza. Limited tickets remain!



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Sell side includes delegates from battery manufacturers, distributors, energy traders, inverter manufacturers, law firms, storage companies, system integrators, technical advisors, accountants, demand response companies

Buy side includes delegates from ESCOs, developers, asset owners, regulators, utilities, DNOs, housing associations

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