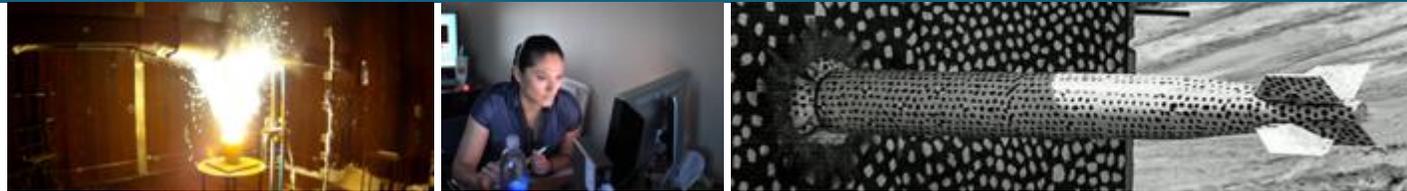


FY20 Energy Storage Policy Update



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Prepared for Peer Review FY20

Policy has become an increasingly important focus area.



The purpose of this presentation is to summarize the key activities and accomplishments of FY20.

- Intelligence gathering on energy storage policy trends
- Addition of a new Policy Section to the Global Energy Storage Database
- Educational workshops for state PUCs that include policy analysis
- Increased participation with national policy groups (NARUC, NASEO, etc.)
- Collaboration with PNNL on thought leadership

We actively track and analyze U.S. policy developments.



Along with major directives from FERC (e.g., Order 841), policymaking on energy storage has gained momentum at the state level.

- Approximately 15 states have developed substantive policy on energy storage to date.
- Key trends are emerging, specifically the 10 focus areas for energy storage policymaking:

1. Utility ownership
2. Multiple use applications
3. Cost / benefit analysis
4. Distribution system modeling
5. Procurement mandates
6. Incentives / tax credits
7. Inclusion of storage in utility IRPs
8. Changes to net metering policies
9. Changes to RPS programs
10. Changes to interconnection standards

As of 3Q 2019, the Policy Section of the GESDB was established.

The Policy Section includes the following components:

- State policy profiles for approximately 15 states.
- Issue Briefs on key policy issues
- Presentations made for educational PUC workshops
- Continual updates as policymaking on energy storage evolves



An ongoing series of educational workshops for PUCs includes an emphasis on policymaking issues.

Educational workshops, in conjunction with SNL Outreach, have been conducted for the following states:

- Maryland
- New Mexico
- Nevada
- Utah
- Iowa / MISO region

This is an ongoing initiative and new workshops are being coordinated for FY21.



Engagement with national policy groups has increased.



Active participation (e.g., speaking engagements) at national policy groups has significantly increased in FY20, as illustrated through the following events:

- NARUC Policy Summits and attendance at NARUC subcommittee meetings
- NASEO events
- Energy Storage Association Policy Summit
- DOE Grand Challenge initiative

SNL Policy is closely integrated with PNNL Policy.



SNL and PNNL partner on a regular basis for policy-related activities

- Joint presentations
- Co-leads / shared hosting roles in panel discussions
- Sharing of intelligence
- Co-authorship of white papers (McNamara / Twitchell / Campbell co-authored a white paper on ownership models for energy storage; the paper is in draft form with planned publication by year-end 2020).

*The Policy work summarized in this presentation has been funded by the
Department of Energy,
Office of Electricity, under the sponsorship of
Dr. Imre Gyuk.*

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