



Energy Storage Technology Advancement Partnership  
(ESTAP) Webinar:

# Energy Storage in Massachusetts: What the Study Said, and What's Next

October 27, 2016

Hosted by Todd Olinsky-Paul  
ESTAP Project Director  
Clean Energy States Alliance

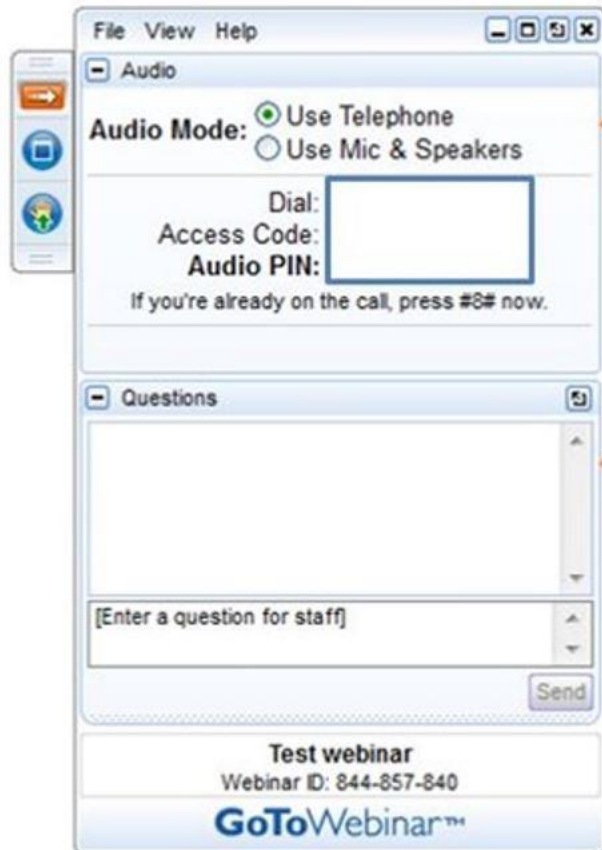


U.S. DEPARTMENT OF  
**ENERGY**



Sandia  
National  
Laboratories

# Housekeeping



The screenshot shows the GoToWebinar interface. At the top is a menu bar with 'File', 'View', and 'Help'. Below it is the 'Audio' section, which includes 'Audio Mode' with two radio buttons: 'Use Telephone' (selected) and 'Use Mic & Speakers'. There are input fields for 'Dial:', 'Access Code:', and 'Audio PIN:'. A note below these fields says 'If you're already on the call, press #8# now.' Below the Audio section is the 'Questions' section, which has a large text area for questions and a 'Send' button at the bottom right. At the very bottom of the window, it says 'Test webinar', 'Webinar ID: 844-857-840', and the 'GoToWebinar' logo.

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You will find a recording of this webinar, as well as all previous CESA webcasts, archived on the CESA website at

[www.cesa.org/webinars](http://www.cesa.org/webinars)

# **State & Federal Energy Storage Technology Advancement Partnership (ESTAP)**

Todd Olinsky-Paul

Project Director

Clean Energy States Alliance (CESA)



# Thank You:

**Dr. Imre Gyuk**

U.S. Department of Energy,  
Office of Electricity Delivery and  
Energy Reliability

**Dan Borneo**

Sandia National Laboratories



# ESTAP is a project of CESA

**Clean Energy States Alliance (CESA)** is a non-profit organization providing a forum for states to work together to implement effective clean energy policies & programs:

**State & Federal Energy Storage Technology Advancement Partnership (ESTAP)** is conducted under contract with Sandia National Laboratories, with funding from US DOE.

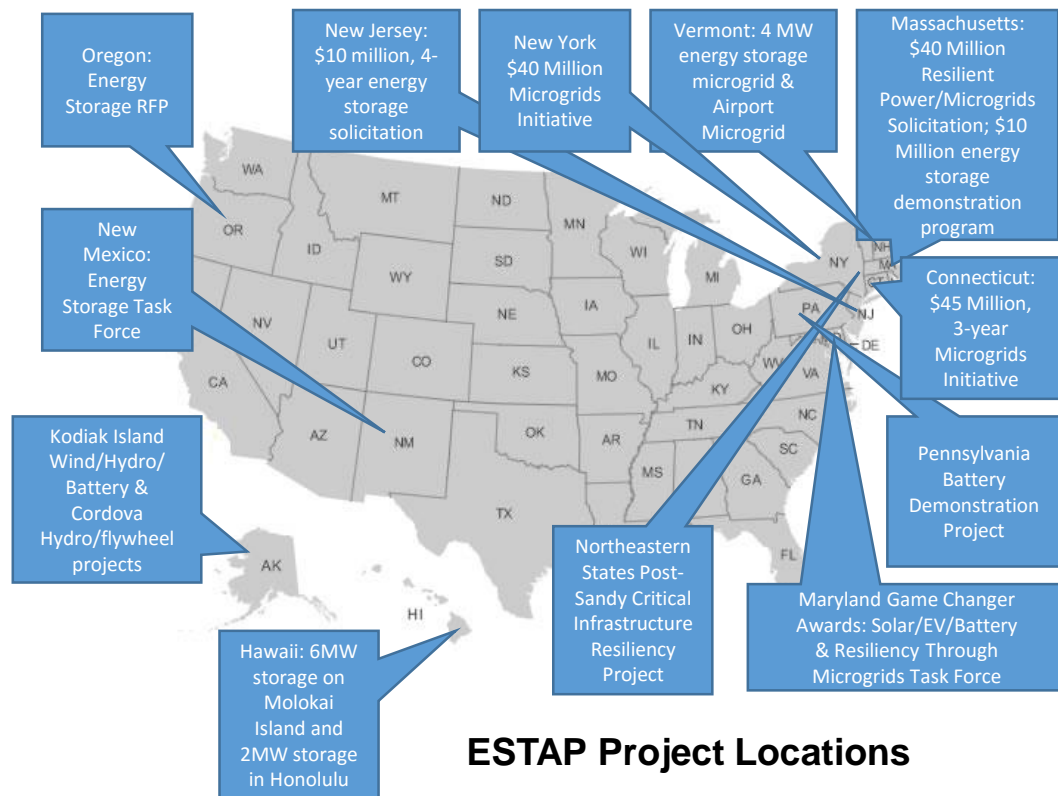
## ESTAP Key Activities:

### 1. Disseminate information to stakeholders

- ESTAP listserv >3,000 members
- Webinars, conferences, information updates, surveys.

### 2. Facilitate public/private partnerships to support joint federal/state energy storage demonstration project deployment

### 3. Support state energy storage efforts with technical, policy and program assistance



**ESTAP Project Locations**





# Energy Storage Technology Advancement Partnership

[More CESA Projects](#)

## Overview

[ESTAP Resource Library](#)[ESTAP Webinars](#)[ESTAP News](#)[ESTAP Listserv Signup](#)

## ESTAP

**Project Director:** Todd Olinsky-Paul

**Contact:** Todd Olinsky-Paul, [Todd@cleanegroup.org](mailto:Todd@cleanegroup.org)

[SIGN UP FOR THIS e-MAILING LIST](#)

The Energy Storage Technology Advancement Partnership (ESTAP) is a federal-state funding and information sharing project, managed by CESA, that aims to accelerate the deployment of electrical energy storage technologies in the U.S.

The project's objective is to accelerate the pace of deployment of energy storage technologies in the United States through the creation of technical assistance and co-funding partnerships between states and the U.S. Department of Energy.

ESTAP conducts two key activities:

1) Disseminate information to stakeholders through:

- The ESTAP listserv (>2,000 members)
- Webinars, conferences, information updates



## NEW RESOURCES

October 14, 2015  
**Resilience for Free: How Solar+Storage Could Protect Multifamily Affordable Housing from Power Outages at Little or No Net Cost**  
By Clean Energy Group

September 30, 2015  
**Webinar Slides: Energy Storage Market Updates, 9.30.15**

## UPCOMING EVENTS

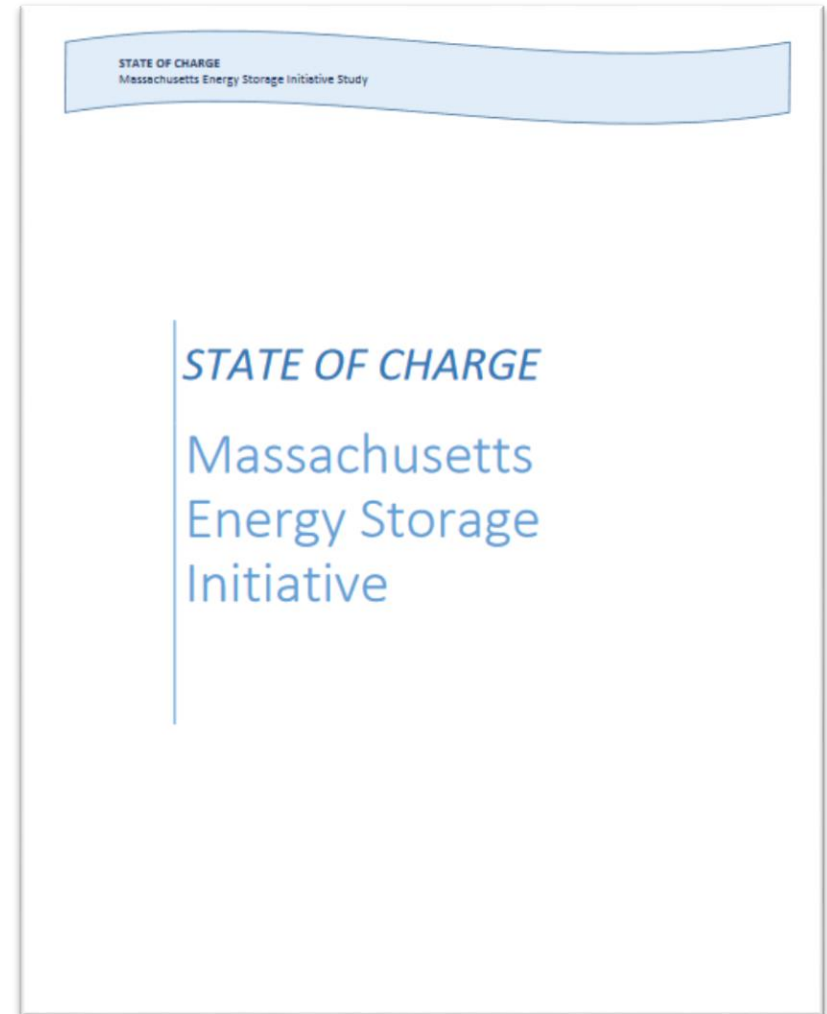
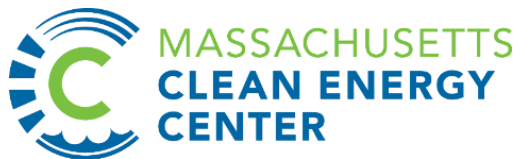
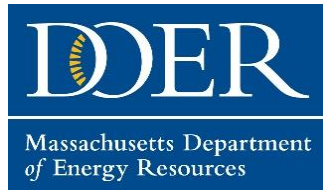
December 16, 2015  
**ESTAP Webinar: State of the U.S. Energy Storage Industry,**

[More Events](#)

## LATEST NEWS

November 30, 2015  
**Massachusetts Takes the Lead on Resilient**

# State of Charge: Massachusetts Energy Storage Initiative

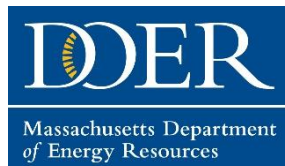


Available at:

[www.mass.gov/eea/energy-utilities-clean-tech/renewable-energy/energy-storage-initiative/](http://www.mass.gov/eea/energy-utilities-clean-tech/renewable-energy/energy-storage-initiative/)

# Panelists

- **Dr. Imre Gyuk**, U.S. Department of Energy Office of Electricity Delivery and Energy Reliability
- **Kavita Ravi**, Massachusetts Clean Energy Center
- **Jacqueline DeRosa**, Customized Energy Solutions
- **Randell Johnson**, Alevo Analytics
- **Will Lauwers**, Massachusetts Department of Energy Resources
- **Todd Olinsky-Paul**, Clean Energy States Alliance (Moderator)





# **DOE-OE Projects supporting the Massachusetts Energy Storage Initiative**

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**IMRE GYUK, PROGRAM MANAGER  
ENERGY STORAGE RESEARCH, DOE**

DOE applauds the “State of Charge” report commissioned by the Massachusetts Department of Energy Resources (DOER) and Massachusetts Clean Energy Center (MassCEC) which recommends policy and program initiatives designed to support deployment of 600MW of energy Storage by 2025.

The DOE Office of Electricity’s Energy Storage Program is pleased to participate in this initiative through analysis, leveraged funding, and joint deployments. A few of the projects should be mentioned:

# Sterling MA

## MA-DOER: Microgrid/Storage Project

Sterling Municipal Light Department

\$1.5M Grant from Community Clean Energy Resiliency Initiative.

1MW/2hr storage to provide resiliency for Police HQ and Dispatch Center

In conjunction with existing 3.4 MW PV

DOE-OE providing funds and technical support towards expansion to 2MW/3MWh

- Backup for police station / dispatch center
- Cost savings through capacity reduction
- Revenues from demand charges and arbitrage
- Integration of intermittent PV



# Northampton, MA

## MA-DOER: Microgrid / Storage Project

- Brings multiple assets together to improve resiliency

- Biomass, PV, Diesel
- Energy Storage

- Islands 3 abutting campuses during outage.

- Northampton Dept. of Public Works
- Smith Vocational & Agricultural High School.
- Cooley Dickinson Hospital

- Energy storage benefits:

- Demand charges
- Black start capability for biomass facility during extended outages
- Reduce diesel during an outage and improve resiliency.



*With DOE support, PNNL will model microgrid operations in order to evaluate financial benefits and optimally scale all energy assets during design phase.*

# ARRA – Vionx: Two Grid-scale Flow Batteries in MA

500 kW / 6 hrs Worcester Project  
Under Construction – Wind Integration

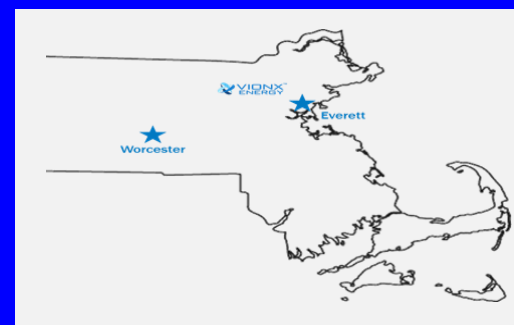


- Foundation 50% complete
- All 8 Battery Containers delivered to site prepped for install once foundation is finished
- Installation targeted to be complete 16/Q4

500 kW / 6 hrs Everett Project  
Solar PV Integration



- Permits in process (Chpt 91/ Build)
- All 8 Battery Containers are going through final inspection
- Installation to be completed 16/Q4



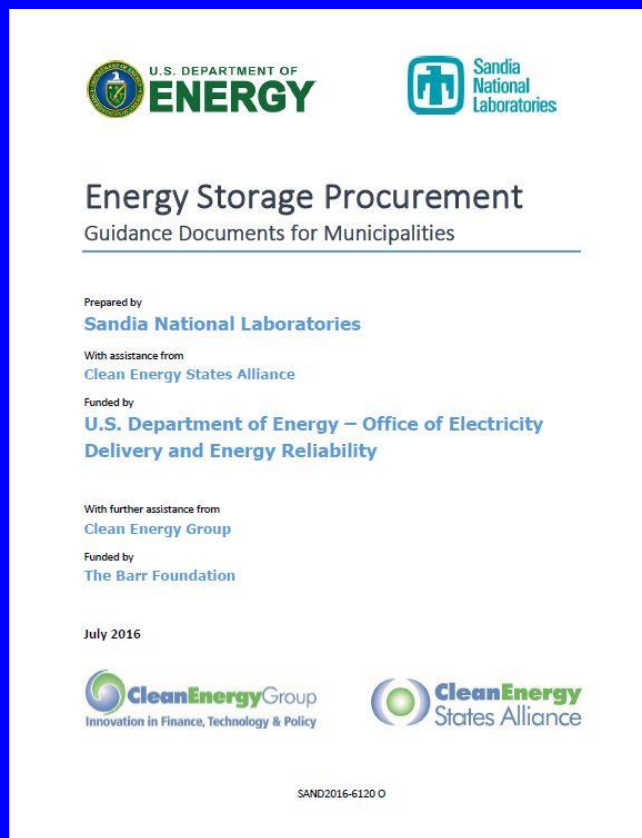


# Energy Storage Procurement, Guidance Document for Municipalities

This document was a response to requests from Massachusetts municipalities engaged in energy storage procurement, for assistance in drafting RFPs for equipment and services. It is now available for use by any entity procuring storage.

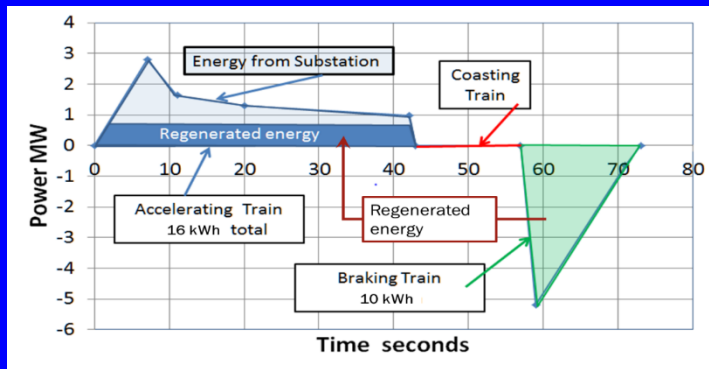
- Developed by Sandia National Laboratories
- Funded by DOE-OE
- Produced in partnership with CESA
- Contains two sample RFPs developed with Sterling, MA, plus a matrix of elements to include in an energy storage RFP

This document has generated a lot of interest, including from IEEE, which invited SNL to present on it at their PES GM Supersession on July 19 in Boston.



# Helix Power (MA based) : Regenerative Metro Train Braking

Metro trains have used regen braking since the '80s.



Why is this important?

1. \$10+B market
  2. Metros are usually highest power usage customer
- i.e. NYC Transit Benefits
- 50% (\$115M) annual savings
  - 20+% IRR
  - 350K tons of CO2 reduction
  - Additional ~100MW peak shaving virtual capacity in NYC



## Building Strong Partners

- DOE --\$450K grants for market study, prelim. design, risk reduction
- NYC Transit / ConEd
  - develop requirements
- NYSERDA - \$2.5M award for flywheel Development; raising \$3M cost share
- Starting relationships:
  - Comm. of MA, MassCEC and MBTA

## Helix Power Technology

- Flywheel stores 1MW – 90 seconds
- 1 million full cycles in 20 years
- Can operate continuously at full power
- 10x-100x faster than batteries
- 50% of Train Energy can be recycled!

# ***The State of Charge***

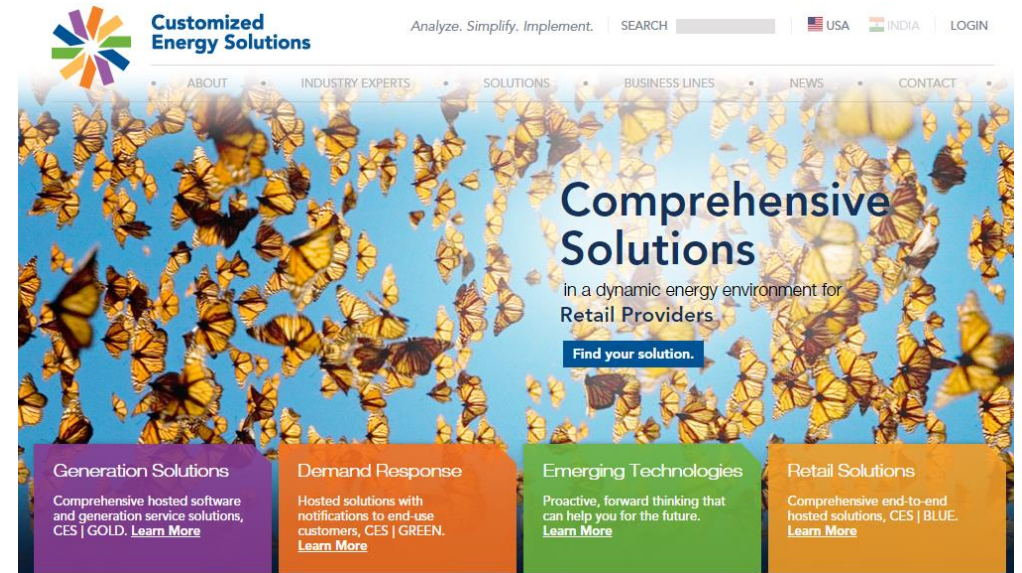
**CESA / CEG Webinar on October 27, 2016**



**Jacqueline DeRosa, VP of Emerging Technologies**

# Customized Energy Solutions

- CES is a privately held corporation headquartered in Philadelphia, Pennsylvania
- At the forefront of competitive electricity markets and emerging technology trends with focus on DR, energy storage and smart grid.
- Customized helps over 400 clients globally
- Involved with active management of over 4000 MWs of resources which include conventional, renewable, demand response, and energy storage resources
- 9 Regional offices in the US and Canada
- Indian operations launched in 2010 with headquarters in Pune
- Over 130 staff members in North America and 15+ in India
- Expanded business to Japan & Mexico in 2015



## CES Emerging Tech Service Offerings

### Consulting

- Feasibility Analysis
- Due Diligence
- Competitive Assessment
- Interconnection Studies
- Financial Analysis
- MarketIQ & StorageIQ : Market Insights
- Project Finance Advisory

### Data Acquisition & Monitoring

- Real-time Communication through SecureNet-RT
- Real-time Monitoring for energy and ancillary services
- Web-based reporting

### Scheduling and Operations

- Registration / Accreditation
- Portfolio Management
- Bidding Strategies
- SOC management
- Settlements



# CES Energy Storage Services



- Markets & Regulatory
  - Storage Market Overview Studies
  - Storage IQ: ISO/RTO storage activity reporting
- Modeling and Consulting
  - Price forecasts
  - Economic analysis and valuation
  - Optimization of product configuration
- Financial Advisory
  - Help secure funding
- Project Development & RFP Support
  - Site selection, interconnection, bid submissions
- Market Operations

Customized assists clients from concept to market implementation

# Integrating Energy Storage Into Energy Markets

- CES Schedules Energy Storage Resources into the ISOs/RTOs
  - 20 MW flywheel facility in NYISO: 3 years
  - 4 MW battery facility in PJM: 1.5 years
  - 2 MW battery facility in PJM: 1 year
  - 4 MW battery facility in IESO: 10 months
  - 2 x 20 MWs Batteries in PJM: September 2015
  - 4 more projects totaling 32 MWs of battery facilities in PJM and ISO-NE in 2016
- CES also provides telemetry to ~25 MWs of both in front and behind the meter storage resources in PJM



*Also previously scheduled: 32 MW battery facility in PJM: 2 years and 8 MW battery facility in NYISO: 1.5 years*

***We offer bidding strategies, state of charge management, scheduling, and dispatch.***

# Energy Storage Initiative

## Goals of the Study

*“The Commonwealth’s plans for energy storage will allow the state to move toward establishing a mature local market for these technologies that will, in turn, benefit ratepayers and the local economy,”*

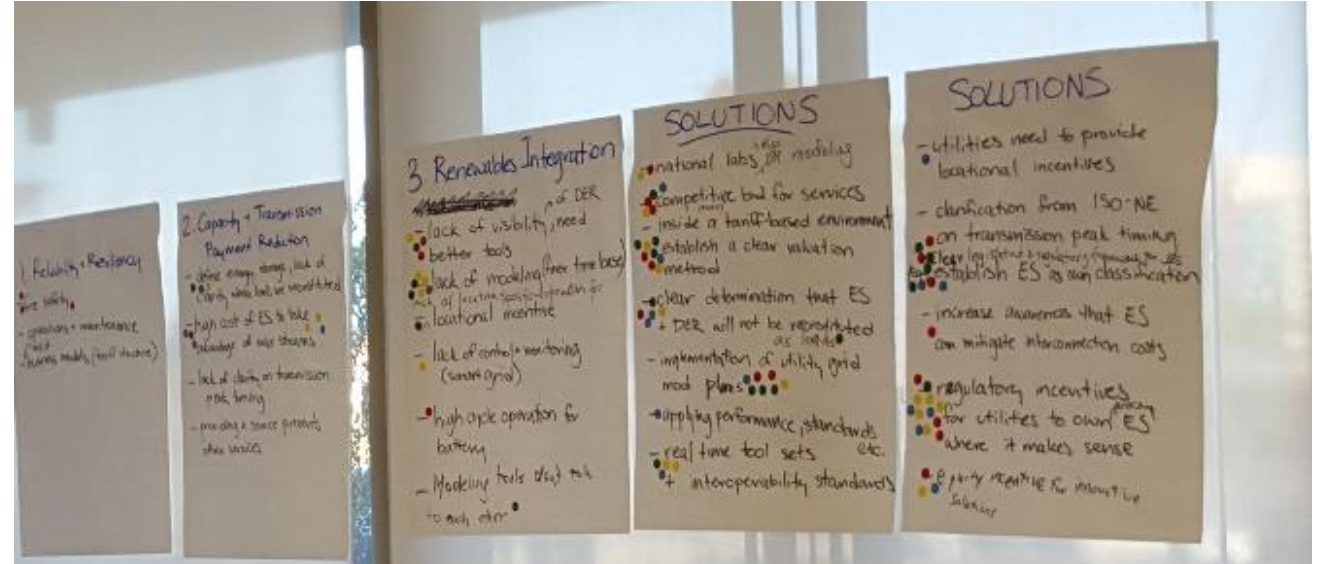
- Analyze the storage industry landscape, review economic development and market opportunities for energy storage, and examine potential policies and programs that could be implemented to better utilize energy storage in Massachusetts.
- Provide policy and regulatory recommendations along with cost-benefit analysis
- Engage stakeholders such as ISO-NE, utilities, the Massachusetts Department of Public Utilities (DPU), storage industry, U.S. Department of Energy (DOE) labs, and other interested parties

**The Commonwealth can nurture and grow the energy storage industry through programs and initiatives aimed at both attracting business and deploying the technology.**

# Energy Storage Stakeholder Perspectives

## ➤ Stakeholders provided feedback on:

- Policy and Regulatory Challenges
- Market Barriers
- Deployment and Market Growth
- Renewable Integration
- Financing and Monetization
- Ownership Models
- Data Availability
- Locational Benefits



- The stakeholder perspectives helped shape and prioritize the modeling and use cases presented
- Further stakeholder engagement during the modeling process was utilized to refine business models

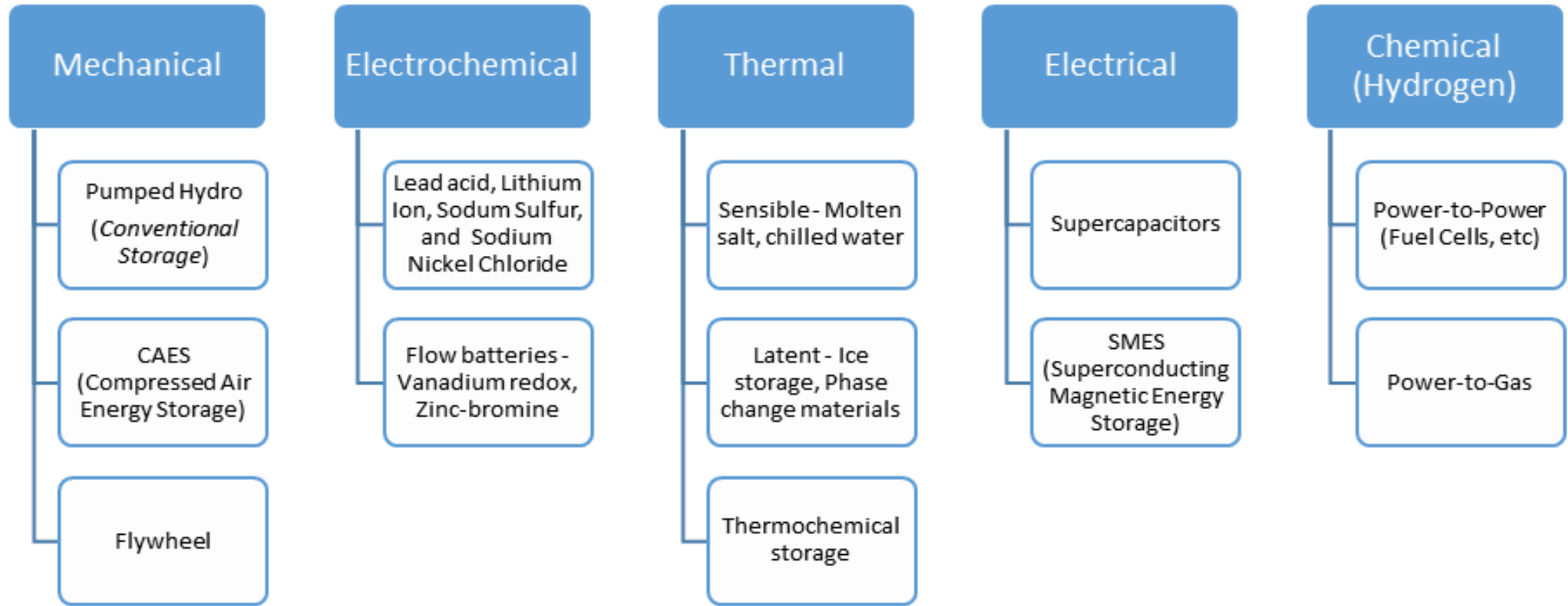
Stakeholders, including utilities, MLPs, solar developers, and competitive suppliers, expressed interest in storage as a **“game changer”** in the energy system

# Study Results

- Recommends a suite of policies designed to promote the development of **600 MW of advanced energy storage in Massachusetts by 2025.**
- Provides \$800 million in system benefits to Massachusetts ratepayers.
- Policies will increase grid resiliency and reduce greenhouse gas emissions
- Recommendations include:
  - *Demonstration funding through the ESI, Inclusion in existing DOER and MassCEC grant programs, encouraging expanded use of energy storage in existing energy efficiency programs, considering energy storage as a utility grid modernization asset, amending the Alternative Portfolio Standard (APS) to include all types of advanced energy storage, Inclusion of solar plus storage in the next solar incentive program, and enabling pairing storage with renewables in future long-term clean energy procurements.*




# Advanced Energy Storage Technologies



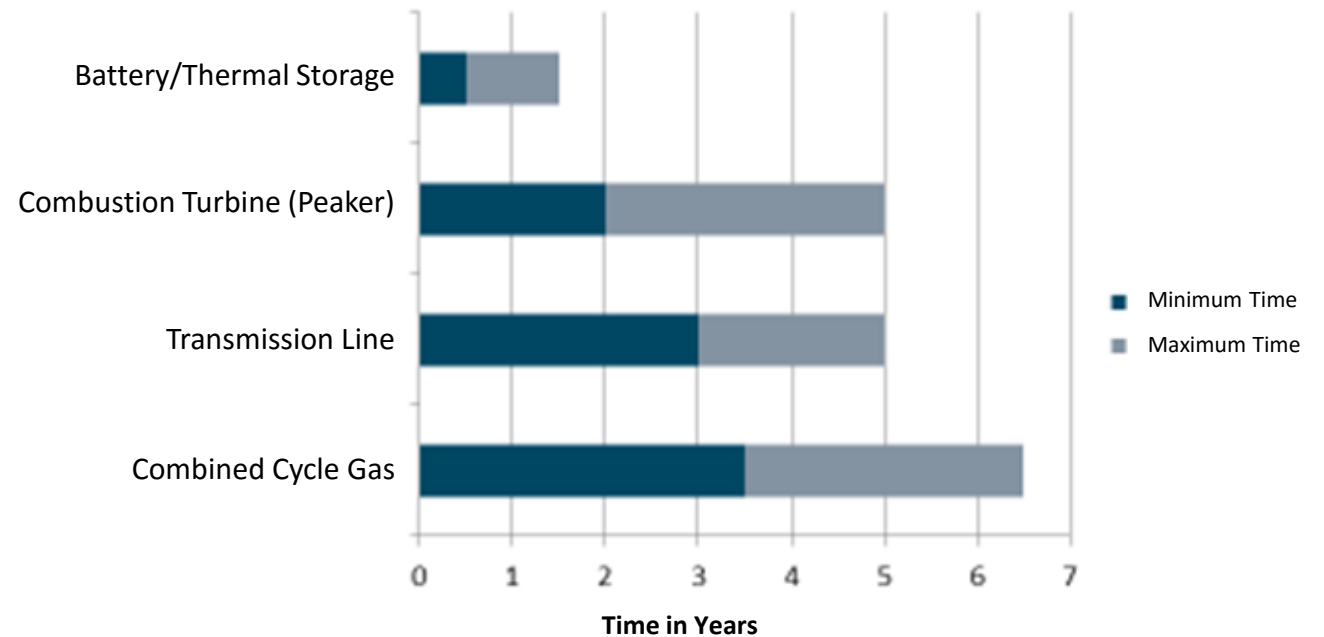
- Pumped Hydro Storage is often referred to as a “conventional” storage technology
- More recent emerging forms of energy storage such as batteries, flywheels, and new compressed air energy technologies are often referred to as “**advanced energy storage**”.

# Energy Storage Attributes

Energy storage resources can be installed much more quickly than traditional resources, reducing risk, and increasing technology flexibility

- Energy Storage is:
- Proven technology
  - Modular and flexible in design
  - Useful in multiple applications
  - Quick to respond (dispatchable)
  - Easy to site
  - Quick to market
- 

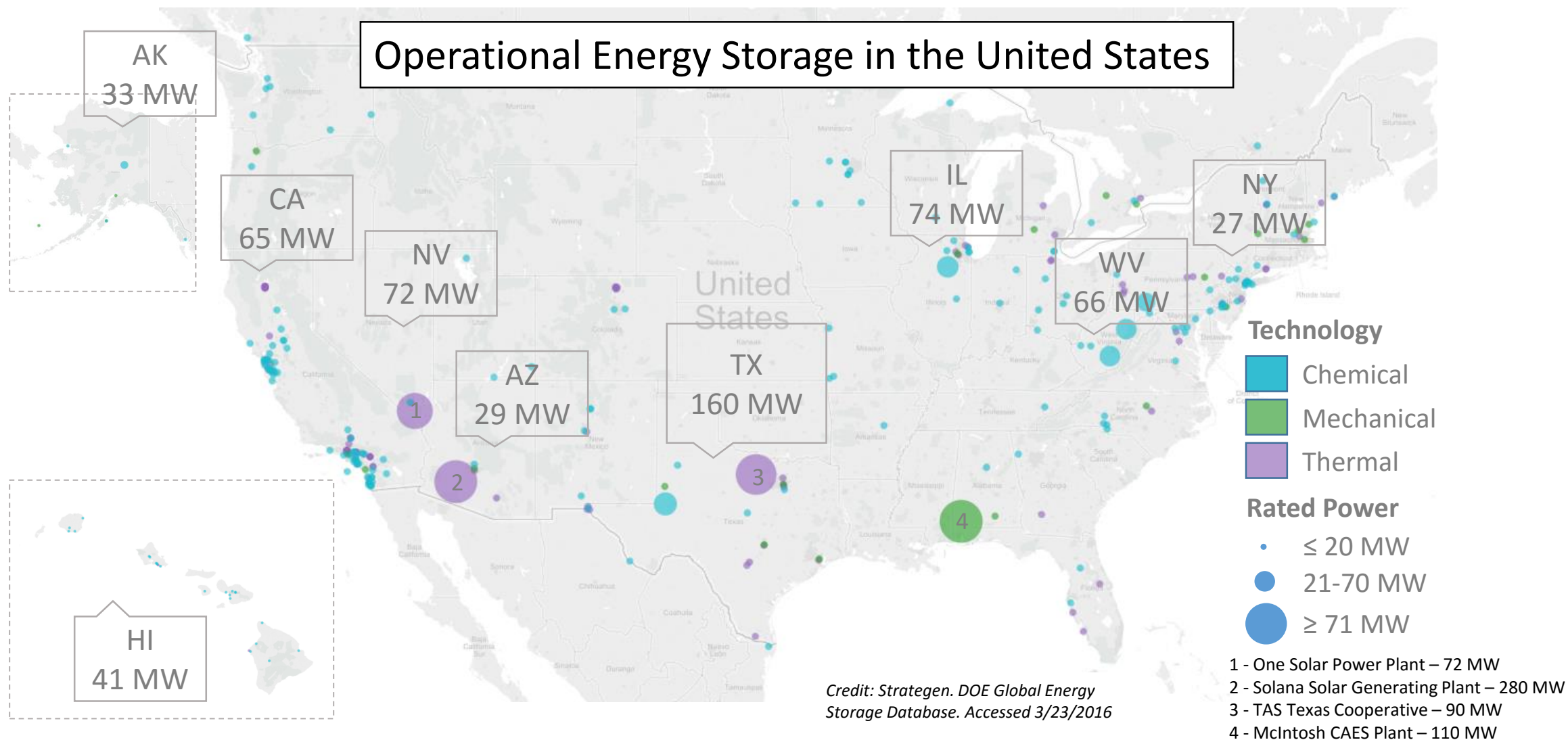
Siting, Permitting, and Installation Time by Resource



Energy storage solutions will deliver smarter, more dynamic energy services, address peak demand challenges and enable the expanded use of renewable generation like wind and solar. The net result will be a more resilient and flexible grid infrastructure that benefits American businesses and consumers.”

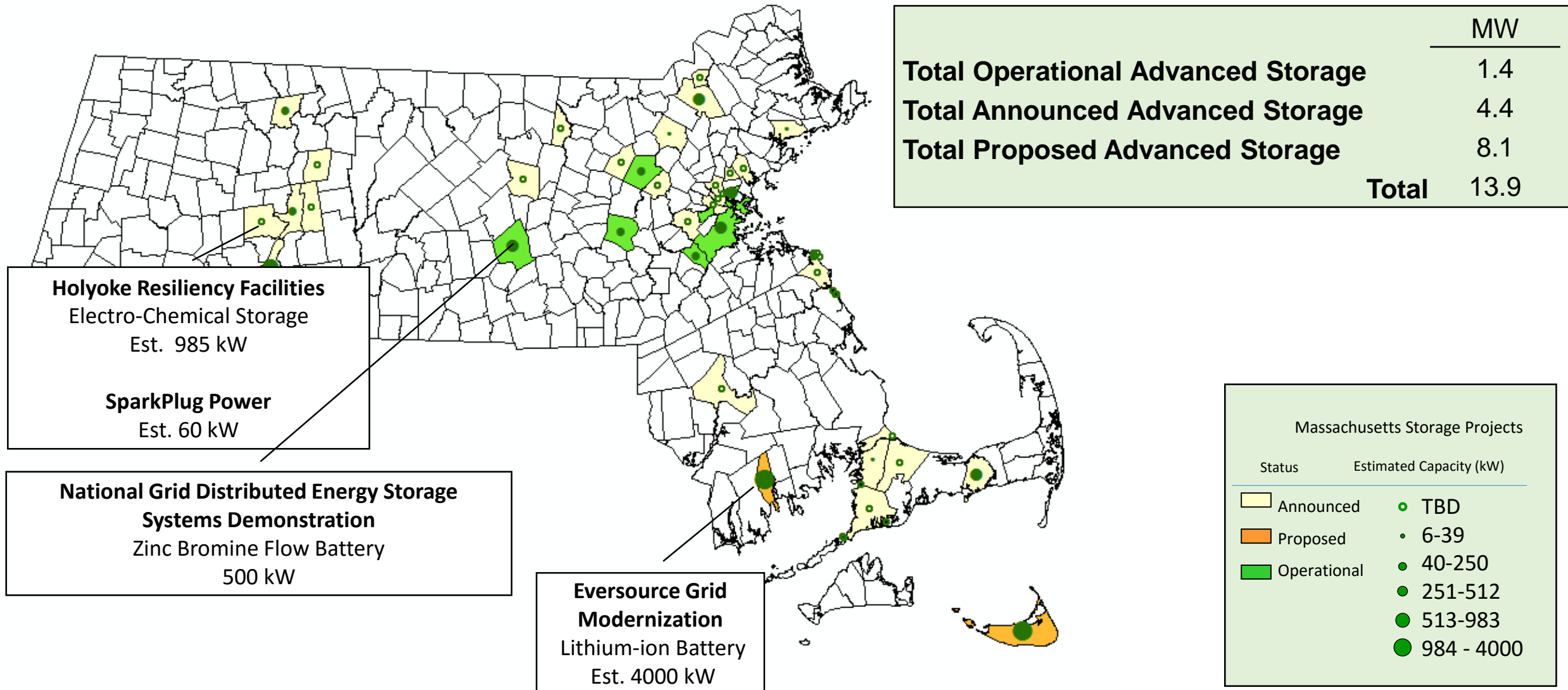
- M. Roberts, Executive Director, Energy Storage Association

# Storage is Real: Growing Deployment in the US & Globally

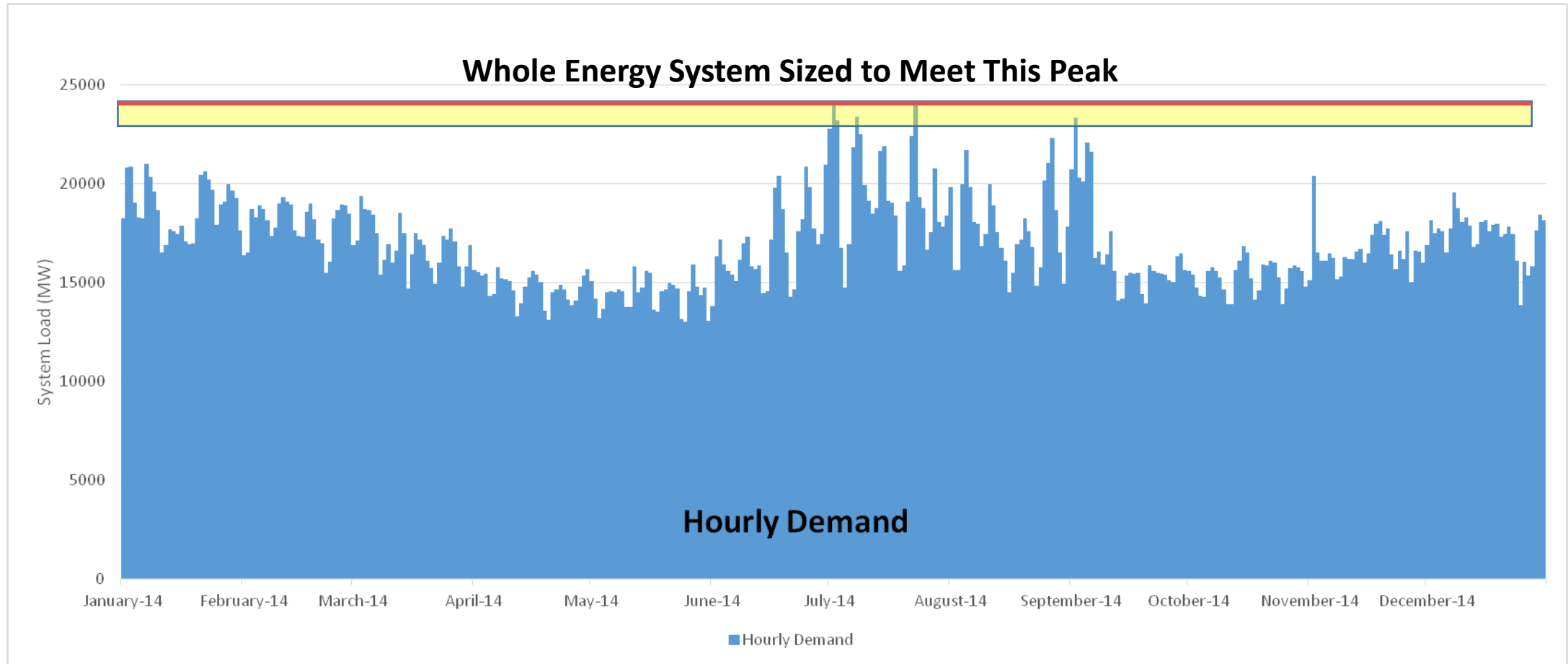


Advanced energy storage has moved out of the research and development phase. It is commercially viable and there are over **500 MW** operating throughout the US.

# Interest in Utilizing Storage is Growing in Massachusetts but Deployment is Limited (2 MW)



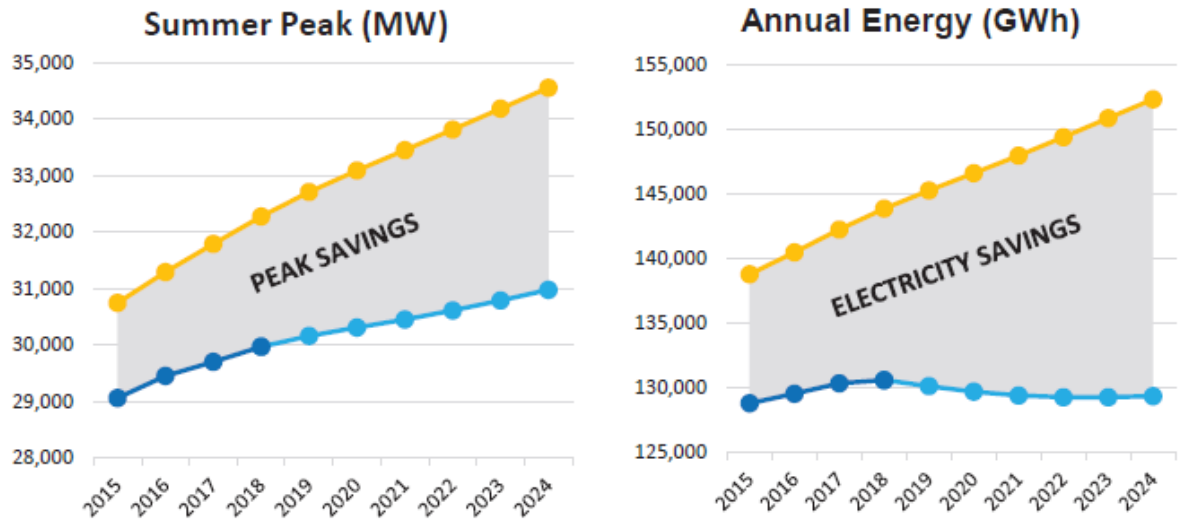
# Electric Grid is Sized for Highest Hour of Demand



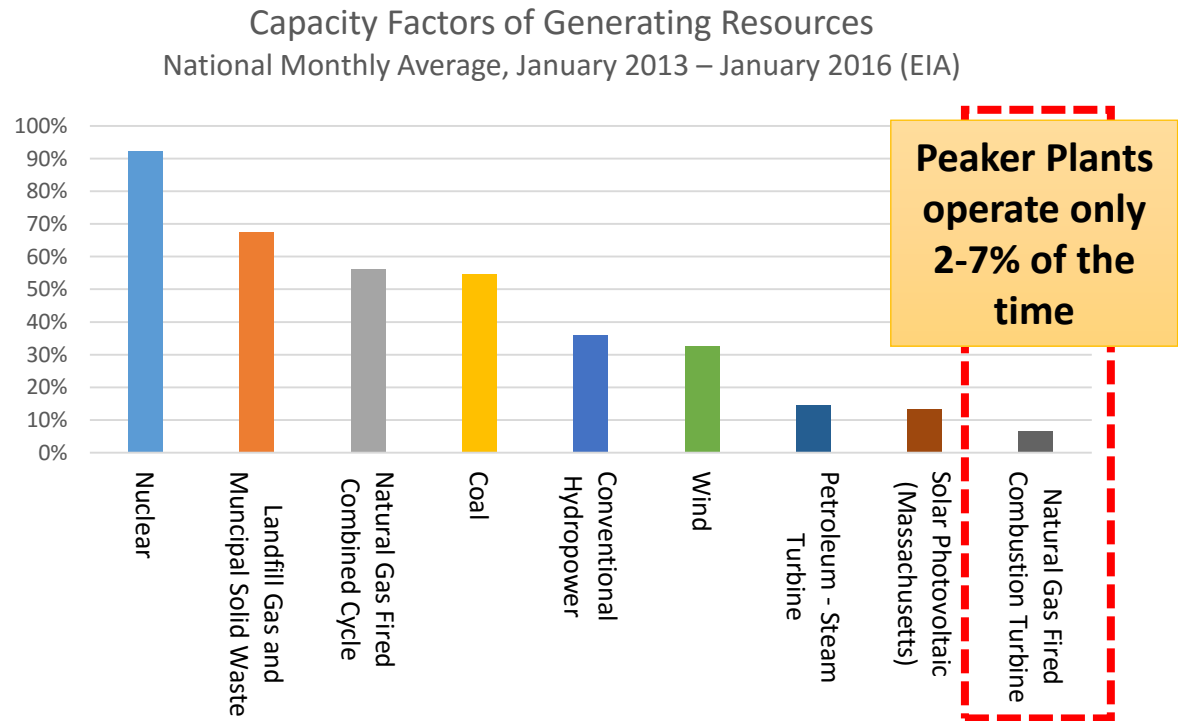
**Top 1% of Hours accounts for 8% of Massachusetts Spend on Electricity**  
**Top 10% of Hours accounts for 40% of Electricity Spend**



# While Energy Efficiency has Decreased Average Energy Consumption, Peak Continues to Grow (1.5% per year)

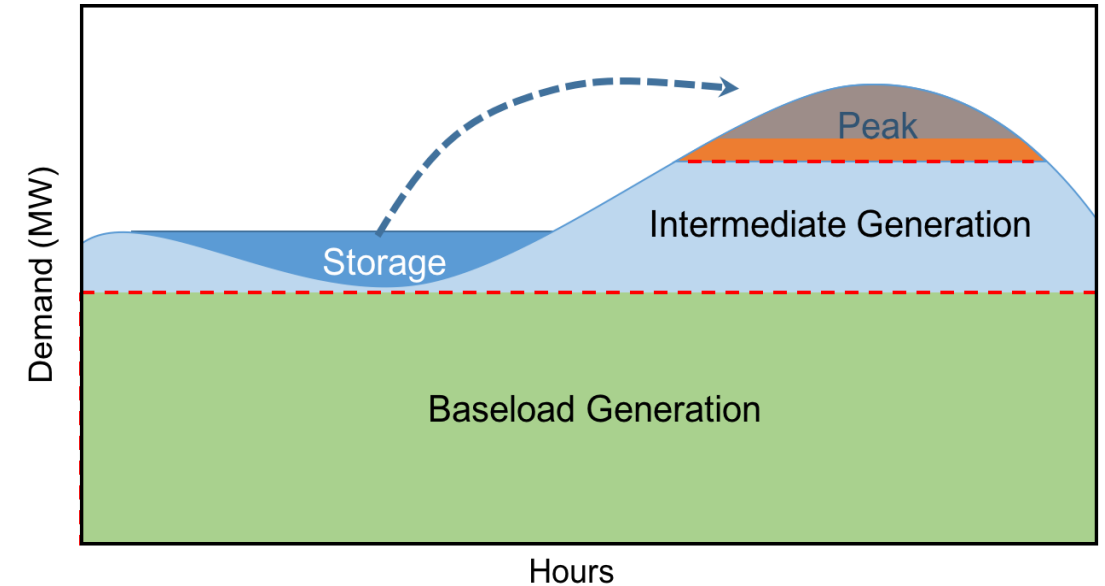
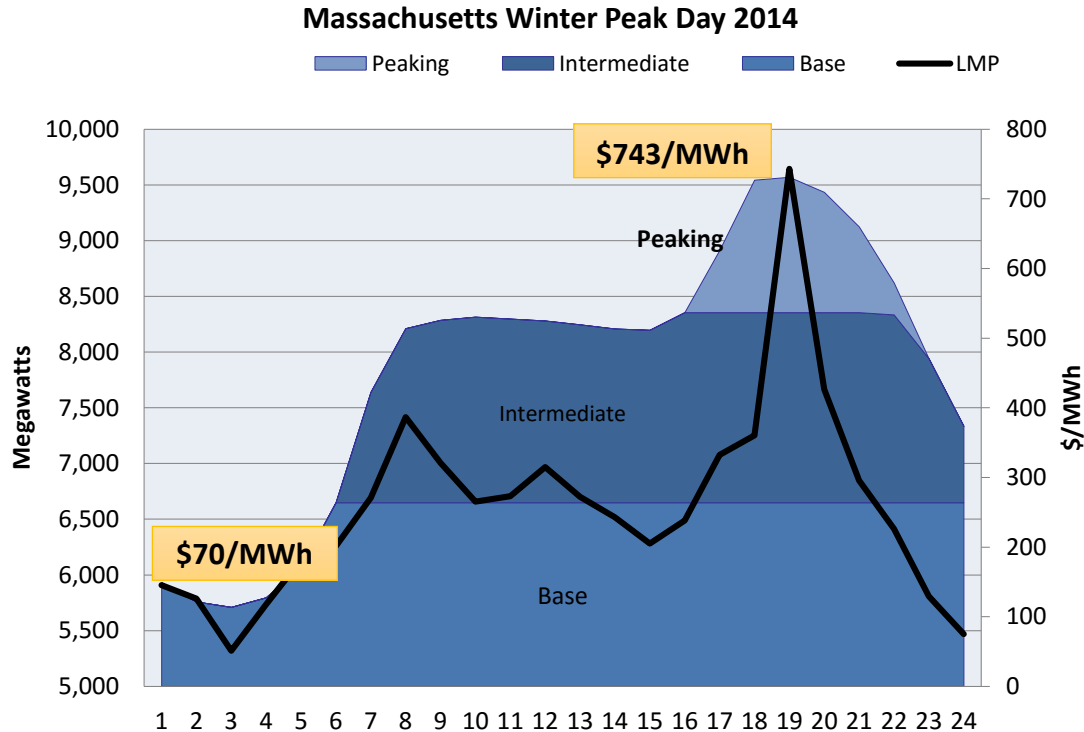


Source: ISO-NE State of the Grid- 2016



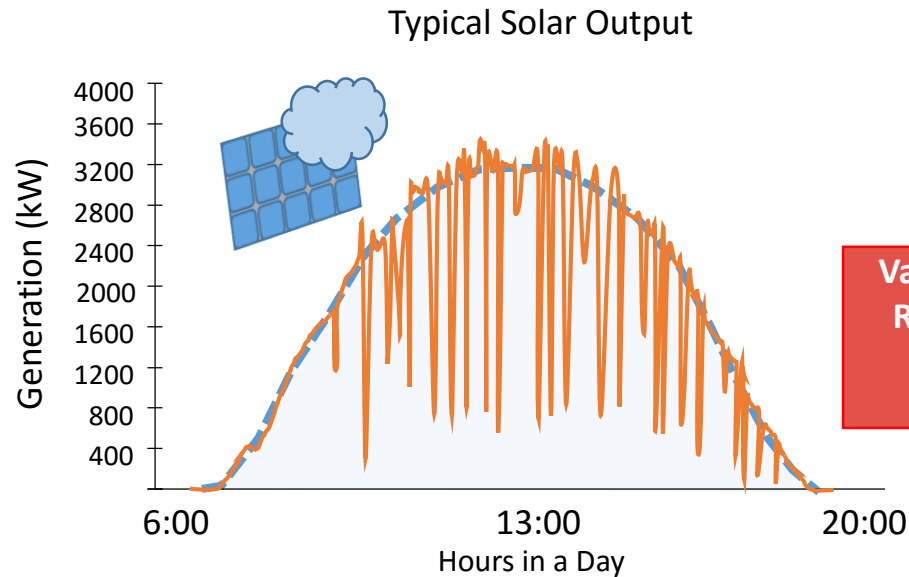
**Growing peak results in inefficient use of grid assets, including generation, transmission and distribution, increasing the cost to ratepayers**

# Storage is “Game Changer” for Meeting Peak



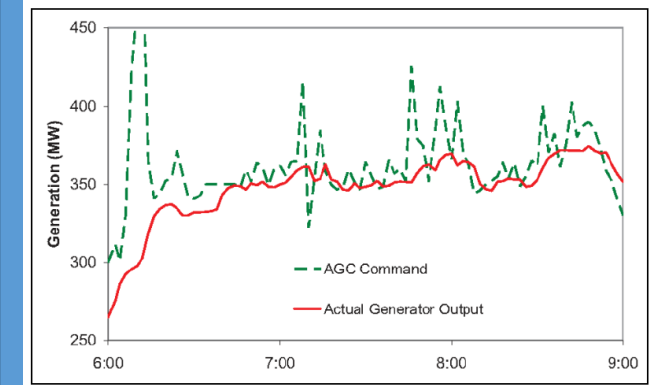
**Energy storage is the only technology that can use energy generated during low cost off-peak periods to serve load during expensive peak.**

# Increased Renewables to Meet State GHG Goals Requires Increased Grid Flexibility to Manage Intermittency

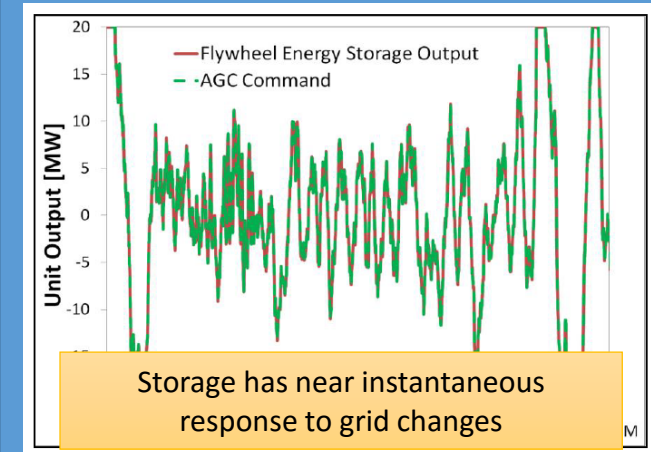


Renewable resources, such as solar, can have variable generation

Variable Output Generators  
Requires Fast and Flexible  
Resources to Maintain  
Balance and Reliability



Slow-ramping Generator



Storage has near instantaneous  
response to grid changes

Fast-responding Energy Storage

According to ISO-NE “State of the Grid – 2016”, fast and flexible resources will be needed to balance intermittent resources’ variable output. Storage can provide this flexibility.

# ALEVO ANALYTICS PRESENTATION OF SYSTEM MODELING





## MODELING AND RESULTS

Dr. Randell Johnson,  
Chief Analytics Officer





# STORAGE IN COMMODITY SUPPLY CHAINS



## FOOD

Warehouses  
Grocery stores  
Freezers & refrigerators



## WATER

Reservoirs  
Above-ground tanks  
Water bottles



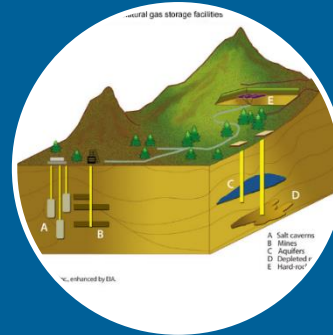
## GASOLINE

Underground tanks  
Above-ground tanks  
Tank trucks  
Portable fuel tanks



## OIL

Above-ground tanks  
Piping



## NATURAL GAS

Depleted fields  
Aquifers  
Salt caverns  
Pipelines  
Above-ground tanks



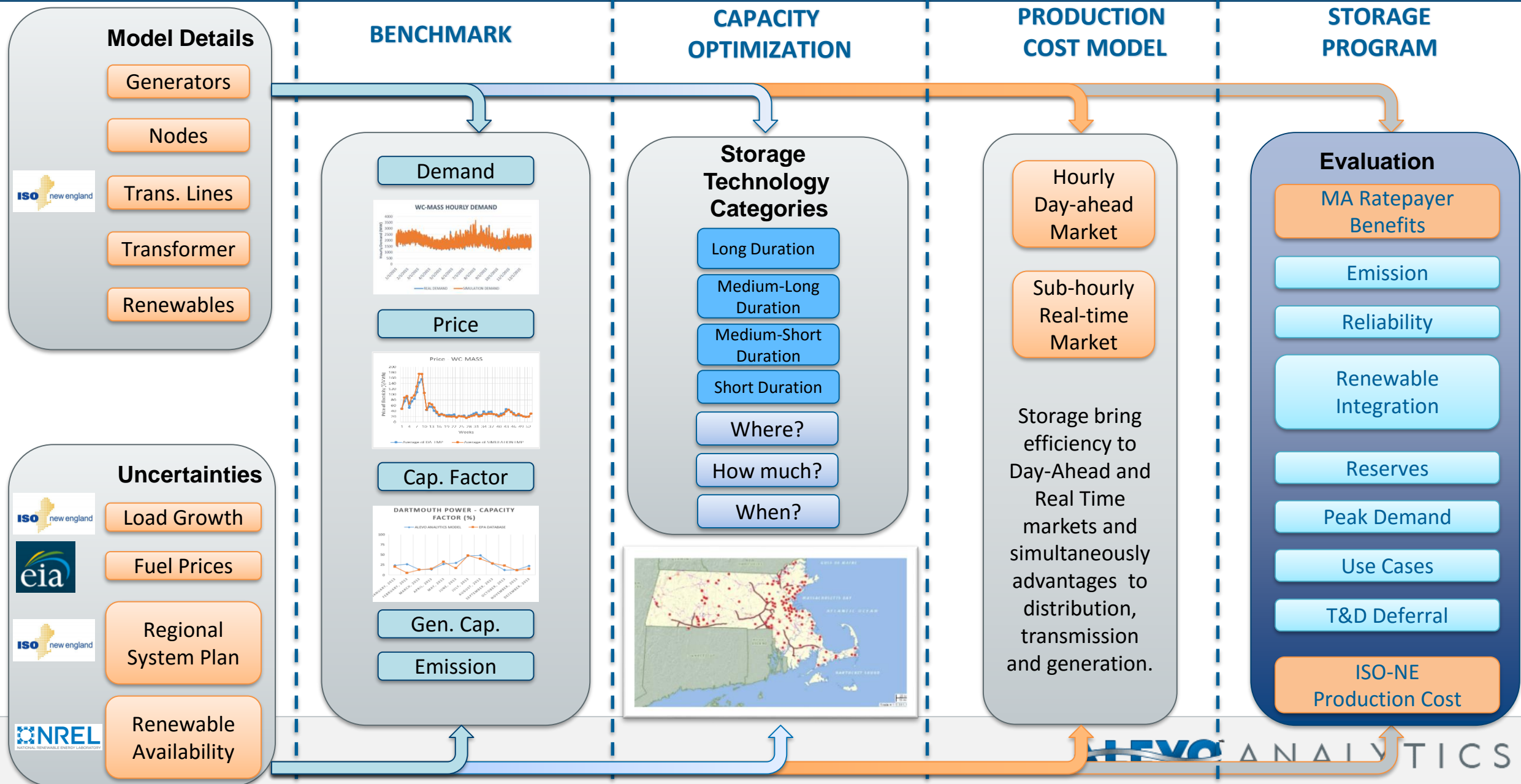
## ELECTRICITY

Energy Storage Technologies

Currently less than  
1% of daily  
electricity  
consumption for  
MA

Storage capacity more than 10% of daily consumption

# STORAGE OPTIMIZATION

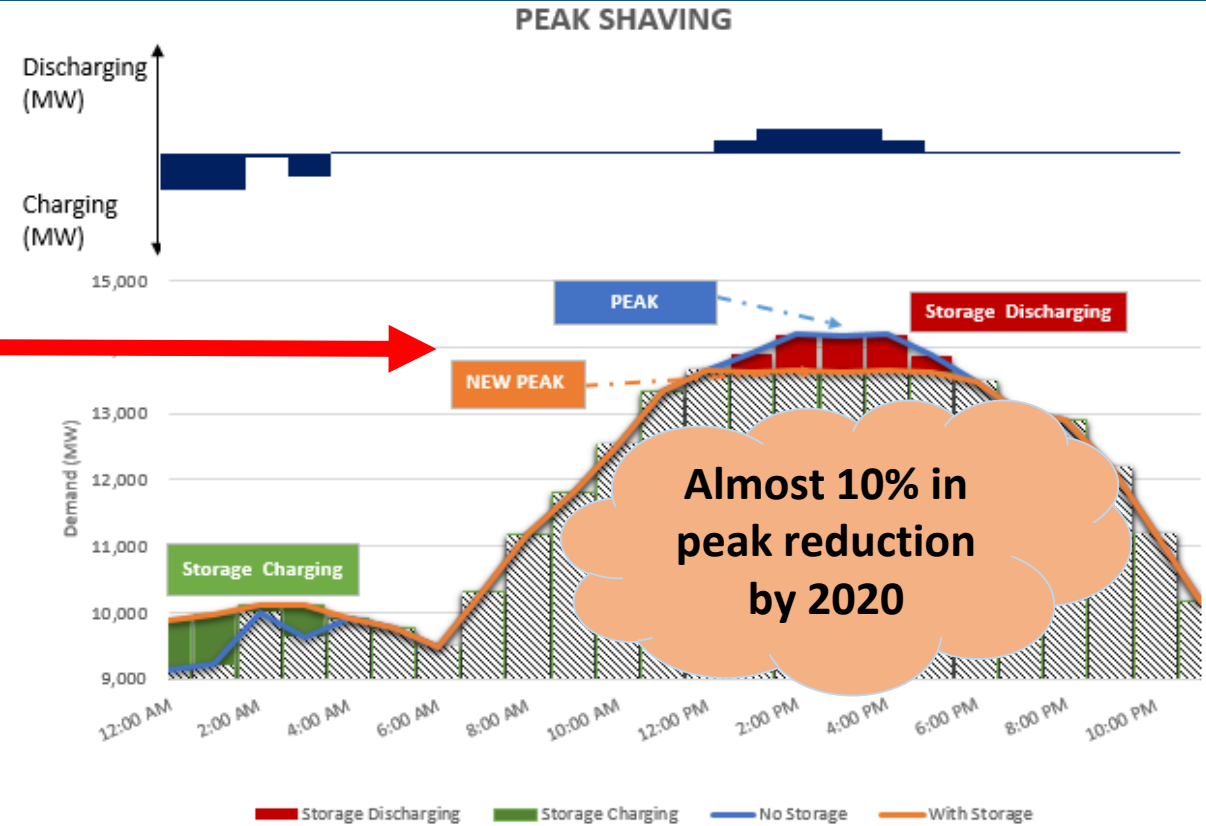


# STORAGE PEAK REDUCTION

Year	Peak Demand for Base Case (MW)	Peak Demand for Energy Storage Case (MW)	Delta in Peak Demand (MW)	% Reduction in Peak Demand
2019	8,828	8,119	709	8.04%
2020	9,293	8,385	908	9.77%

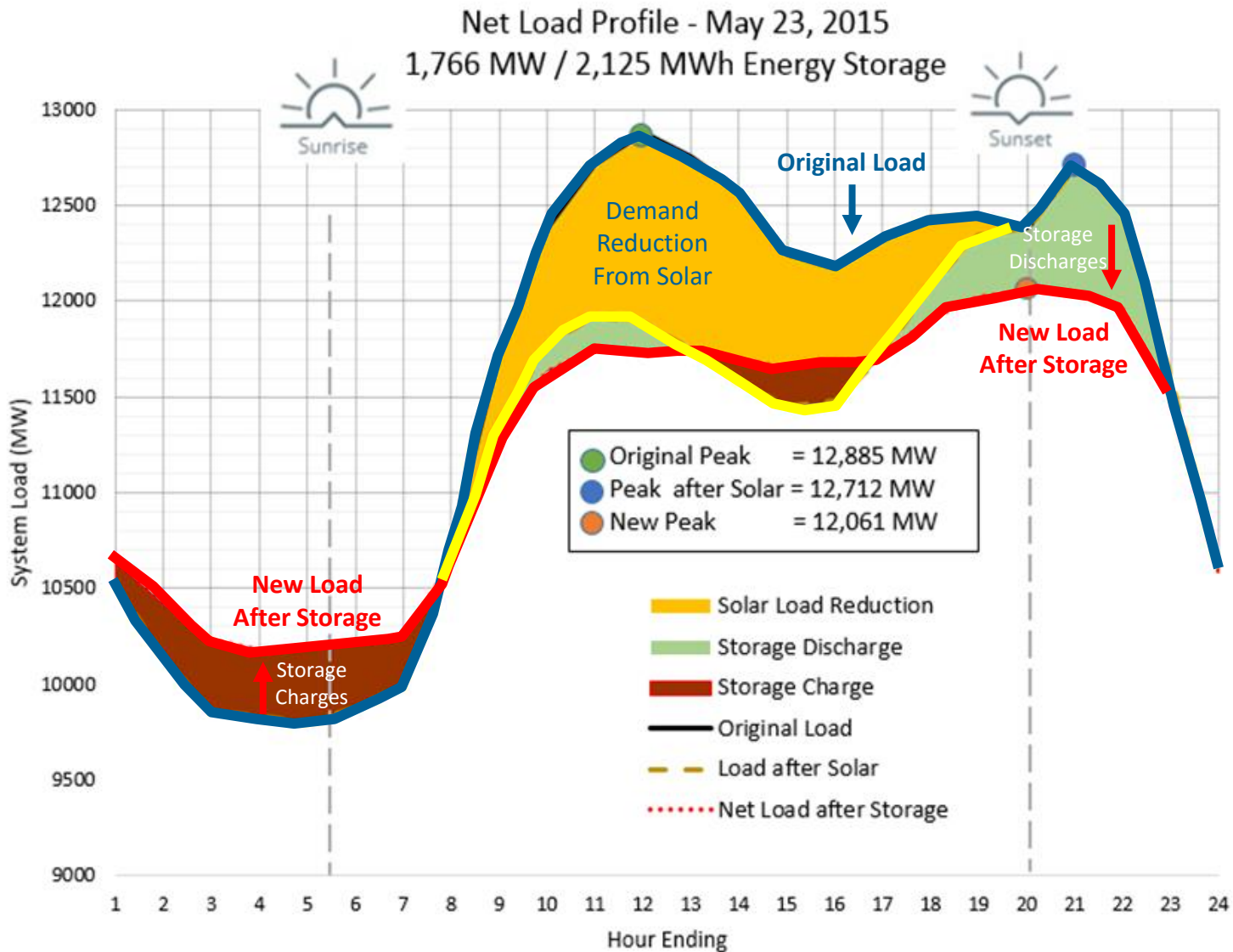
Total Savings (thousand \$)	Capital Cost	2017	2018	2019	2020
Natural Gas Conventional Combustion Turbine	973\$/kW	137,193	392,119	689,857	883,484
Natural Gas Advanced Combustion Turbine	676\$/kW	95,316	272,428	479,284	613,808

- Storage dispatched on peak days to get maximum peak shaving.
- Reduction of the peak can reduce the need for additional peaker resources and avoid capital costs



**\$1093 million peaking plant cost reduction over 10 years.**

# TIME SHIFT OF RENEWABLES AND PEAK REDUCTION



**\$219 million**  
increased renewable  
integration savings  
over 10 years.

- Solar reduces system peak and storage can provide additional peak reduction after sunset
- Time shift of renewables
- Relieving distribution constraints
- Helps meeting the state's current solar target



# SYSTEM BENEFITS

Benefit Categories	Benefit Description	
Energy Cost Reduction	Energy storage replaces the use of inefficient generators at peak times causing: 1) reduced peak prices which 2) reduces the overall average energy price. This also benefits the natural gas supply infrastructure.	\$275M
Reduced Peak	Energy storage can provide peaking capacity to 1) defer the capital costs peaker plants and 2) reduced cost in the the capacity market	\$1093M
Ancillary Services Cost Reduction	Energy storage would reduce the overall costs of ancillary services required by the grid system through: 1) frequency regulation, 2) spinning reserve, and 3) voltage stabilization	\$200M
Wholesale Market Cost Reduction	Energy storage can be a flexible and rapid tool that help generators operate more efficiently through: 1) less wear and tear, 2) less start up and shut down costs, and 3) reduced GHG emissions.	\$197M
T&D Cost Reduction	Energy storage 1) reduces the losses and maintenance of system, 2) provides reactive power support, 3) increases resilience, and 4) defers investment	\$305M
Increased Renewable Integration	Energy storage reduces cost in integrating renewable energy by 1) addressing reverse power flow and 2) avoiding feeder upgrades	\$219M
Total System Benefits		\$2,288M



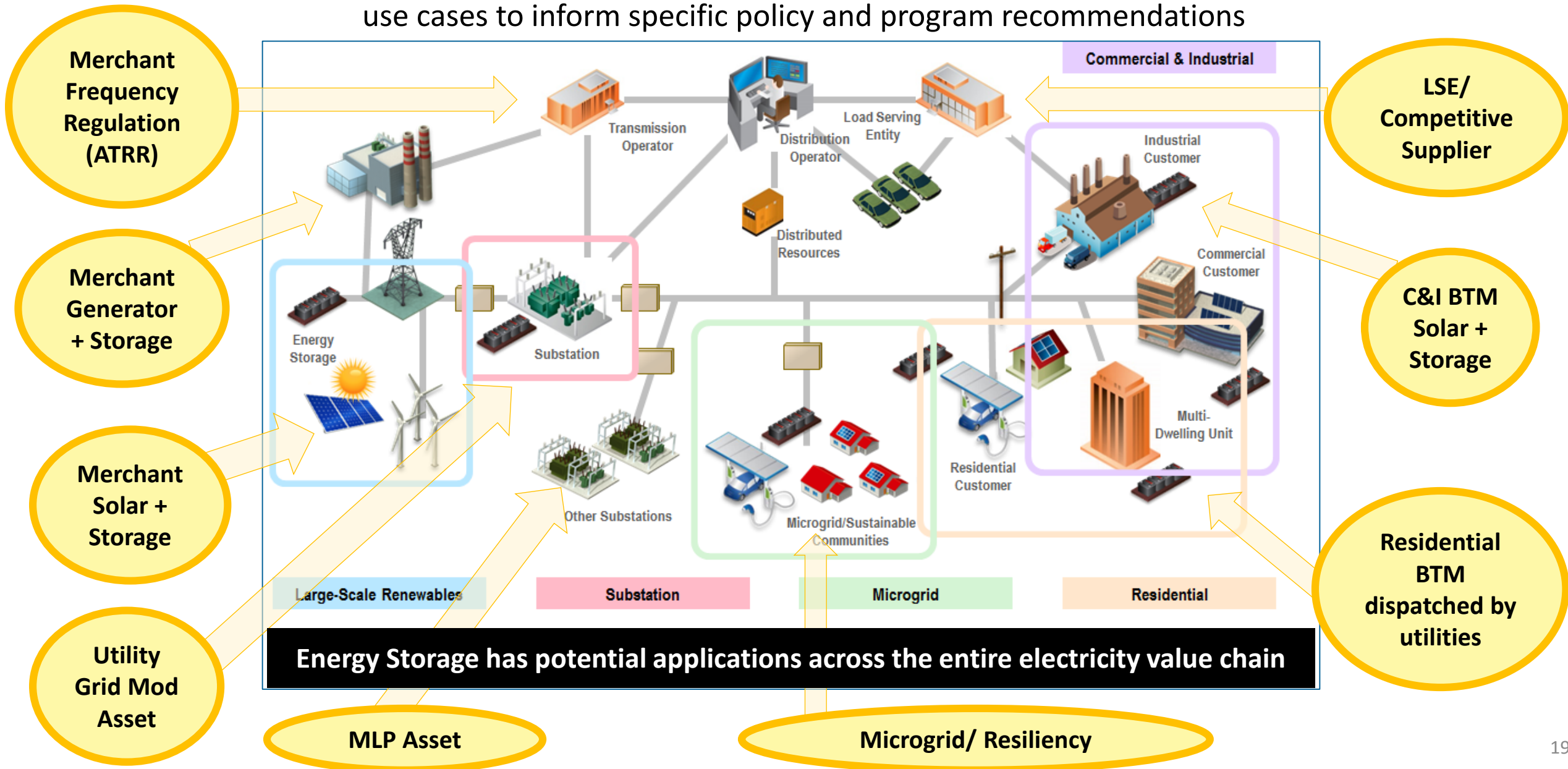
# ENERGY STORAGE

## APPLICATION USE CASES

*Analyses of specific applications and business models to utilize energy storage across the Massachusetts electric grid*

# Storage Use Cases

The Study analyzed the economics and business models of ten storage use cases to inform specific policy and program recommendations



# System Modeled Results

Use Case		Estimated Share of 1766 MW Recommendation		Millions \$		Benefit/Cost Ratio
		%	MW	Combined Benefits (Market Revenue + System Benefits)	Cost	
Investor Owned Utility (IOU) Grid Mod Asset: Distributed Storage at Utility Substations		40%	707	1301	387	3.36
Municipal Light Plant (MLP) Asset		10%	177	446	97	4.60
Load Serving Entity (LSE)/Competitive Electricity Supplier Portfolio Optimization		8%	141	158	77	2.05
Behind the Meter	C&I Solar + Storage	6%	106	103	58	1.78
	Residential Storage	4%	71	19	53	0.49
	Residential Storage Dispatched by Utility	5.5%	96	129	39	2.43
Merchant	Alternative Technology Regulation Resource	1.5%	28	45	15	3.00
	Storage + Solar	10.5%	185	373	102	3.66
	Stand-alone Storage or Co-Located with Traditional Generation Plant	9.5%	168	405	92	4.40
Resiliency/Microgrid		5%	87	133	48	2.77

# IOU Use Cases:

## Storage as a Utility Asset

- Storage distributed across a utility's system provides the utility a **large aggregated, flexible tool** to manage peaks, integrate renewables, and mitigate outages
- Storage has the potential to meet several of the objectives outlined in the DPU Grid Modernization proceeding:
  - Optimizing Demand by reducing system and customer costs at peak
  - Reducing the effects of outages
  - Integrating distributed resources, particularly Solar PV

*Given the recent advances in energy storage technology and cost-effectiveness, it is hard to imagine a modern electric distribution system that does not include energy storage.*

- IOU Grid Modernization Plan

# Use Case #1: IOU Storage Asset

Utility Grid Modernization Plans may include storage if supported by a comprehensive *business case analysis*:

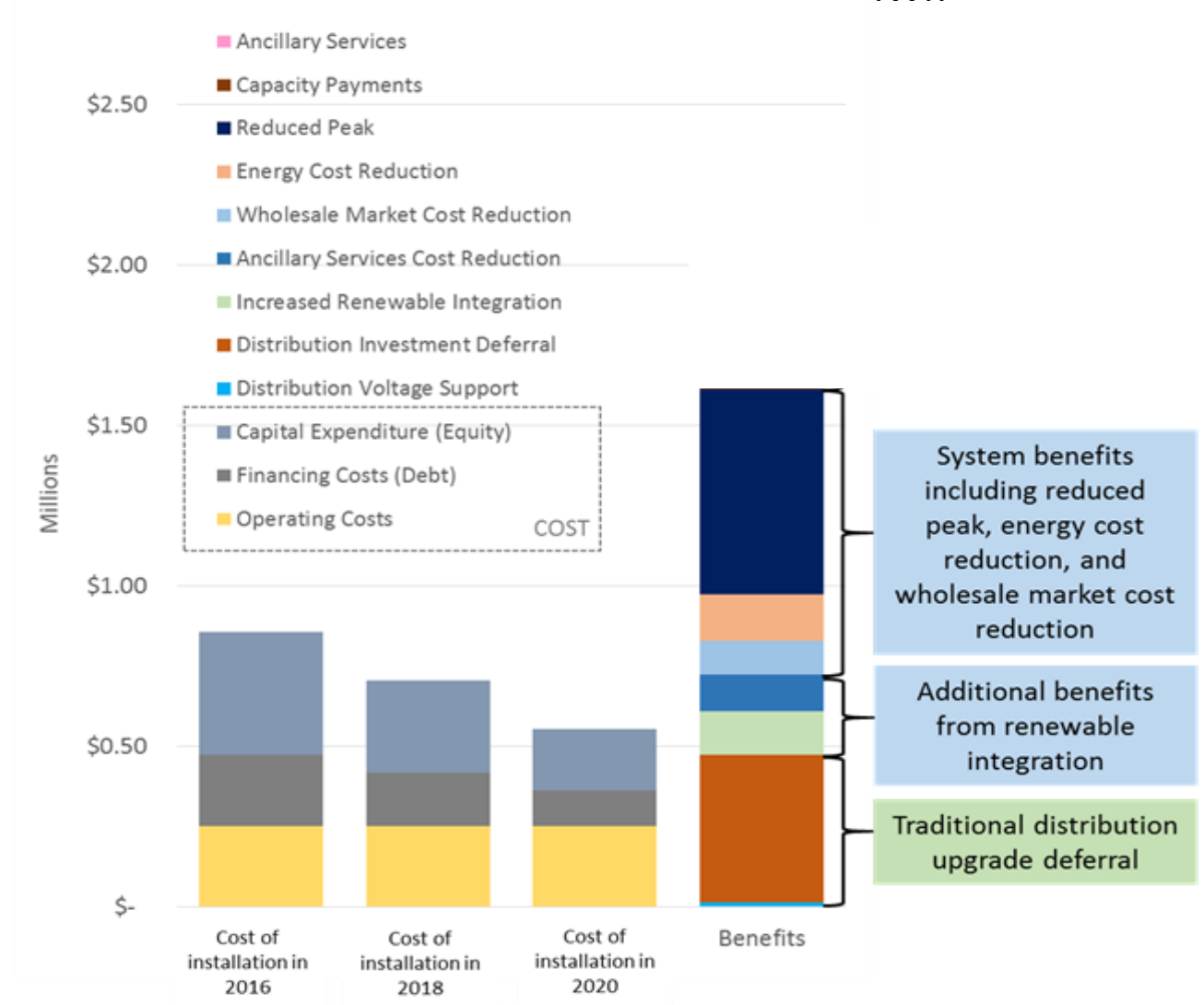
- Rationale and business drivers for the proposed investment
- Identification of all quantifiable and non-quantifiable benefits and costs

Benefit-Cost Analysis shows:

- Benefits must be monetized beyond traditional voltage support and upgrade deferral
  - Renewable DG Integration
  - Peak Demand Reduction
- Cost effective when additional benefits are included
- Additionally, sales to ISO-NE allowed in current legislation may offset storage costs to the ratepayer

## Benefit-Cost Analysis

1MW/1MWh

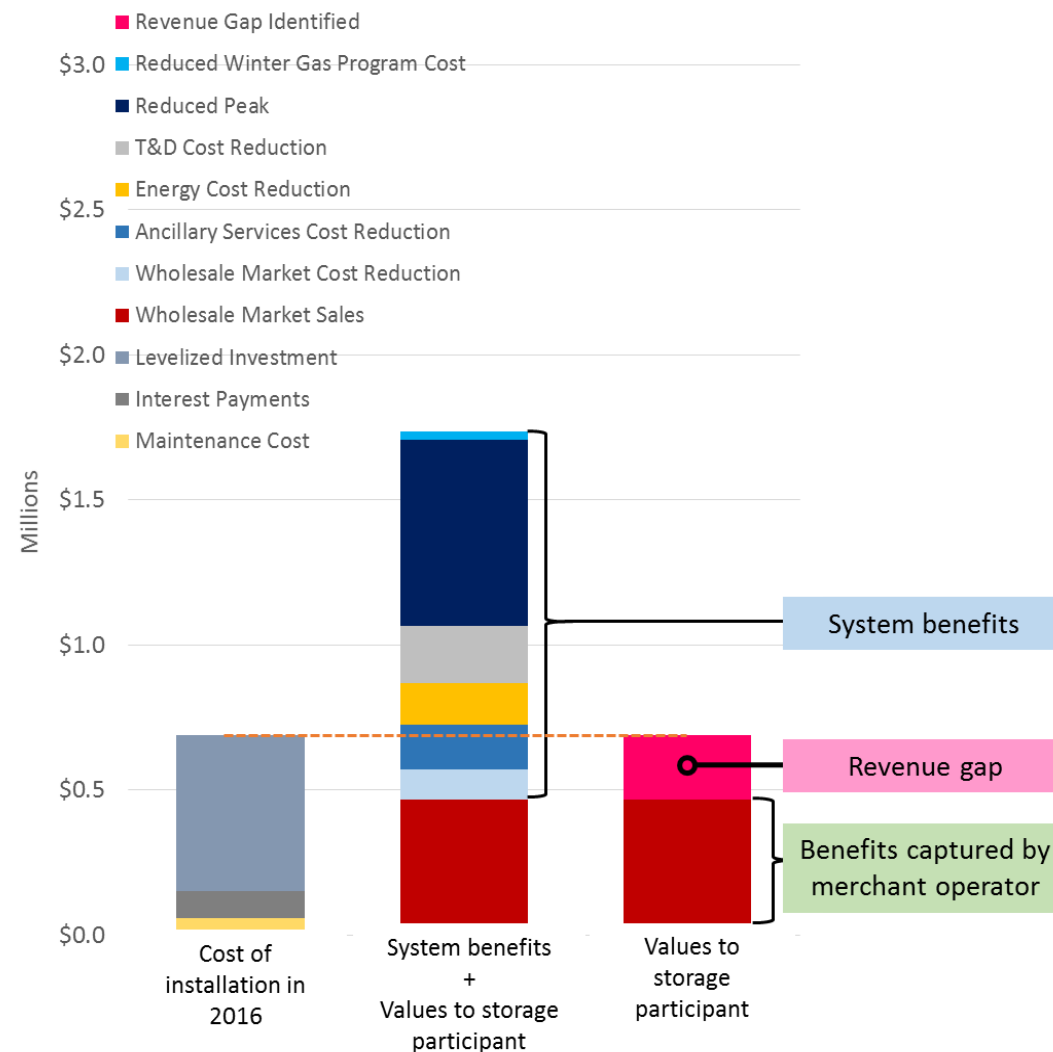




# Use Case #5C: Merchant Gas + Storage Asset

- Storage, co-located or coordinated with a gas generator, is dispatched to work with wholesale markets to improve the efficiency of generators.
  - Storage can take over load ramping and frequency response responsibilities, allowing the generator to operate at constant output near optimal heat rate, reducing the associated maintenance costs and GHG emissions.
  - Storage enabling generators to operate at optimal heat rate is especially important to the North East in coping with gas shortage during the winter.
  - Storage described above can still participate in the wholesale market of ISO-NE.
- The electricity system benefits from more efficient operation of the generators, lower cost of ancillary services, lower energy price, easier renewable integration, reduced peak capacity cost, and lower emission.
- The storage asset would be dispatched to work with wholesale markets to improve efficiency of generators,
  - Reduce starts and stops
  - Reduce emissions
- The project is cost-effective if system benefits are included.
- Challenge: ISO-NE rules around co-located resources to be registered as a single asset and share responsibilities are unclear or do not currently exist.

## Benefit-Cost Analysis 1MW/1MWh



# Recommendations to Unlock the Use of Storage in MA

## GRANT AND REBATE PROGRAMS

- Energy Storage Initiative (ESI) RFP
- Rebate Program for Customer-sited Storage (“MOR-Storage”)
- Launch C&I Solar + Storage Feasibility Grant programs
- Community Resiliency Grants – Part III
- Green Communities Designation and Grants
- Add All Types of Advanced Energy Storage to APS
- Evaluate Storage in development of Next Generation Solar Incentive Program
- Storage as Grid Modernization Asset
- Storage as Peak Demand Savings tool in EE Plans
- Allow bids that have energy storage components in any possible future long-term clean energy procurements
- Workforce and Technology Development

Comprehensive Clean Energy Diversification Legislation (H. 4568) clarified this issue after the study findings were completed

- Utilities May own storage
- Storage is defined

# Recommendations to Unlock the Use of Storage in MA

## ISO MARKET RULES

### ➤ Challenges

- Storage Cannot Fully Participate in All Markets
- ISO-NE cannot utilize energy storage as a flexible resource
- Energy storage is not on level playing field

### ➤ Recommendations

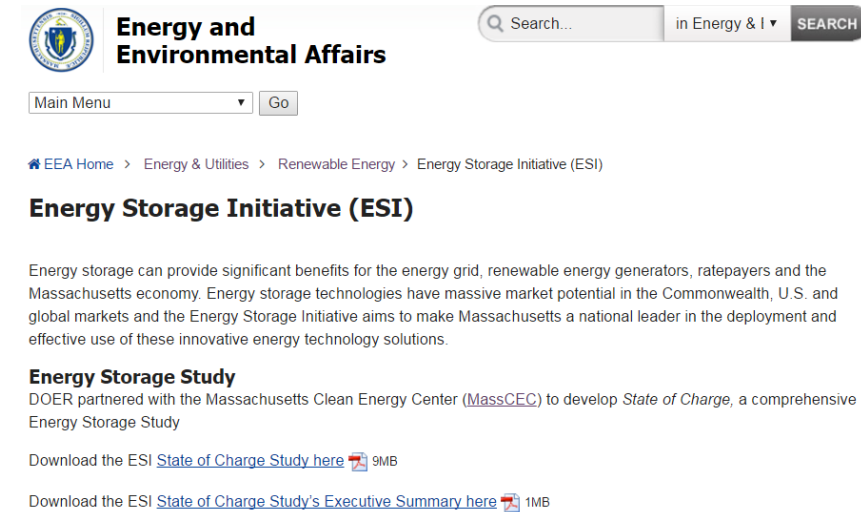
- Create an Advanced Storage Working Group at ISO-NE
- Create Storage-Specific Rules
  - Optimization, Bidding, Scheduling and Dispatch for Energy and Ancillary Services
  - Capacity Market
  - Interconnection
  - Transmission Planning
  - Behind the Meter
  - Load Reconstitution

# Next Steps and Timing

## Fall 2016

- *State of Charge* Study Release 9/16/16
- *State of Charge* Stakeholder Session 9/27/16
- Mid-October Stakeholder Panel Session Regarding Legislation Energy Storage Component
- Release RFP for ESI Demonstrations
- Resiliency Grant program
- Finalize Storage in development of Next Generation Solar Incentive Program

- Other (2016 – 2017 TBD):** Through EEAC, encourage DPU review of guidelines to accommodate storage in demand reduction programs
- Enable Storage to be included in Future Long-term Renewable Energy Procurements
  - Engage ISO-NE Market Rule Changes
  - Expand MassCEC Investment Programs to support energy storage companies in Massachusetts



Stay up to date by joining the ESI mailing list at:  
<http://www.mass.gov/eea/energy-utilities-clean-tech/renewable-energy/energy-storage-initiative/>

# Questions?



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