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A better way

What's next for

Electrochemical LDES?

Webinar | 3 April 2025

Strictly private & confidential

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Pantokrator is a leading advisory firm based in London focused on helping climate tech companies raise capital to scale to provide a better way



Andre Shortell
Managing Partner,
Co-Founder

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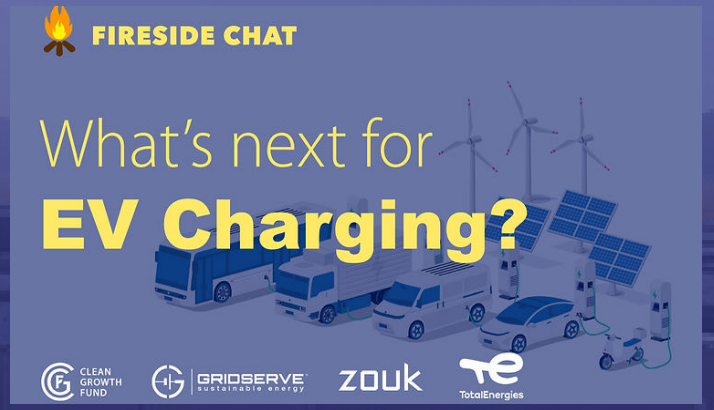


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Vice President
Energy Storage Specialist

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Previous Webinars







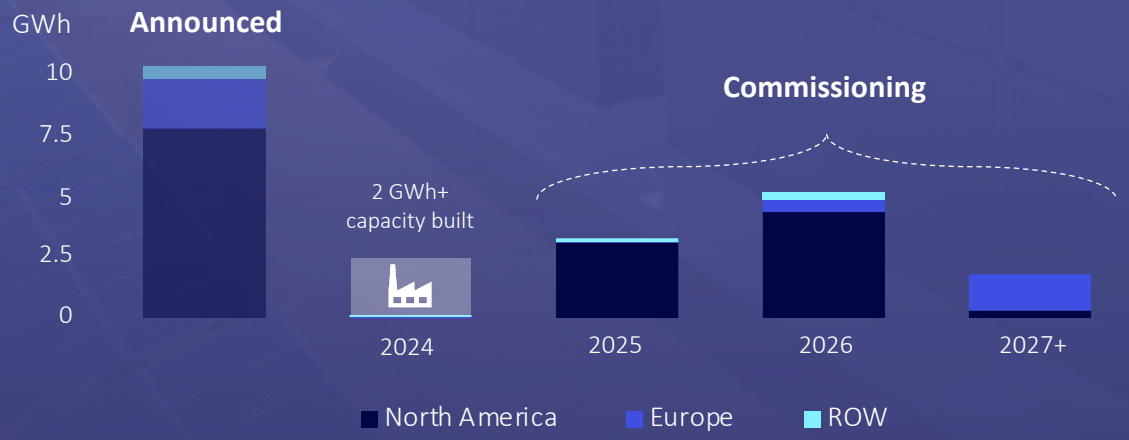






350+ GW

Demand potential



LDES investments



Acquisitions	BESS bankruptcies	LDES bankruptcies
cellcube	BRITISHVOLT	Ambri
faradion	northvolt	redflow
STRYTEN ENERGY		

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Key Trends Driving LDES



Electrification

Electrify everything

1.5x usage by 2040



Renewables

Enabling renewables to scale

3x solar by 2030



Energy security

Reduce fossil fuel dependence

Grid resilience



Government

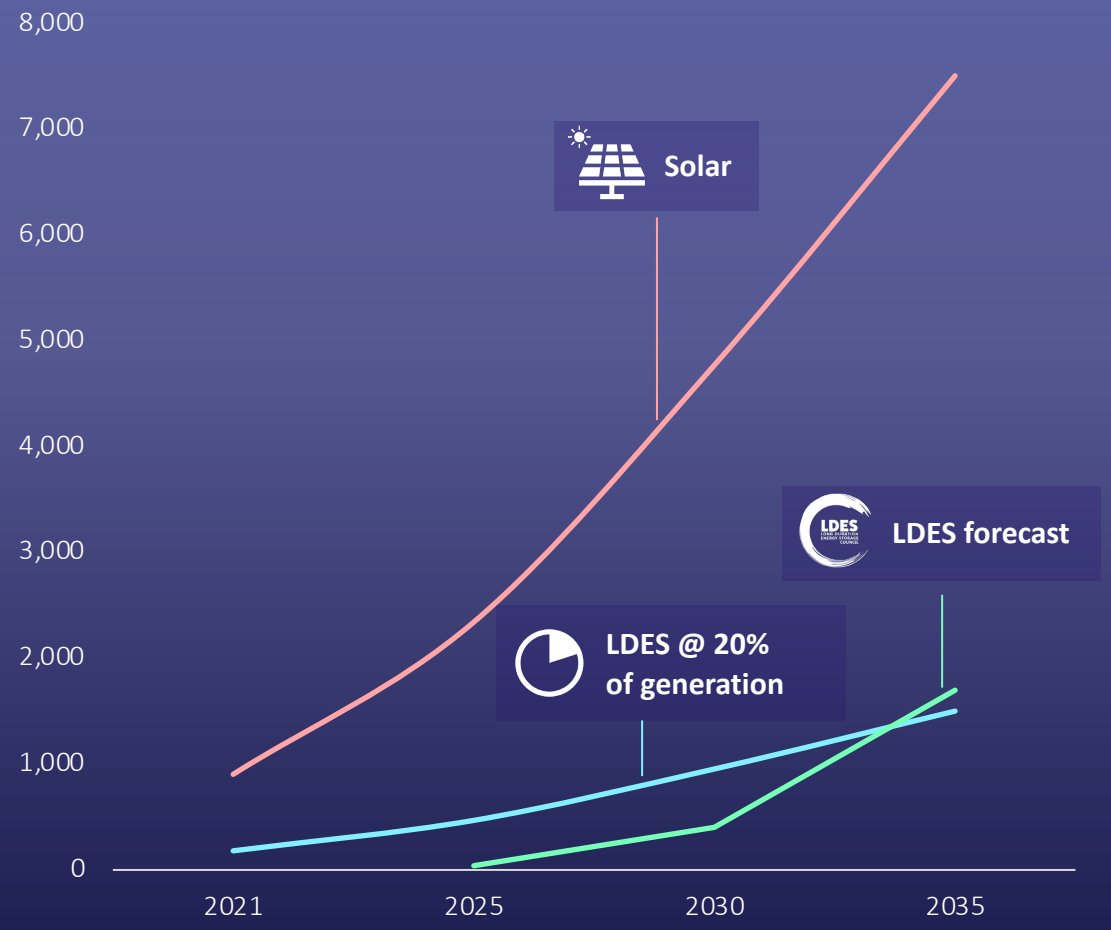
International support to Net Zero

DOE, UK Cap & Floor, EU Green Deal

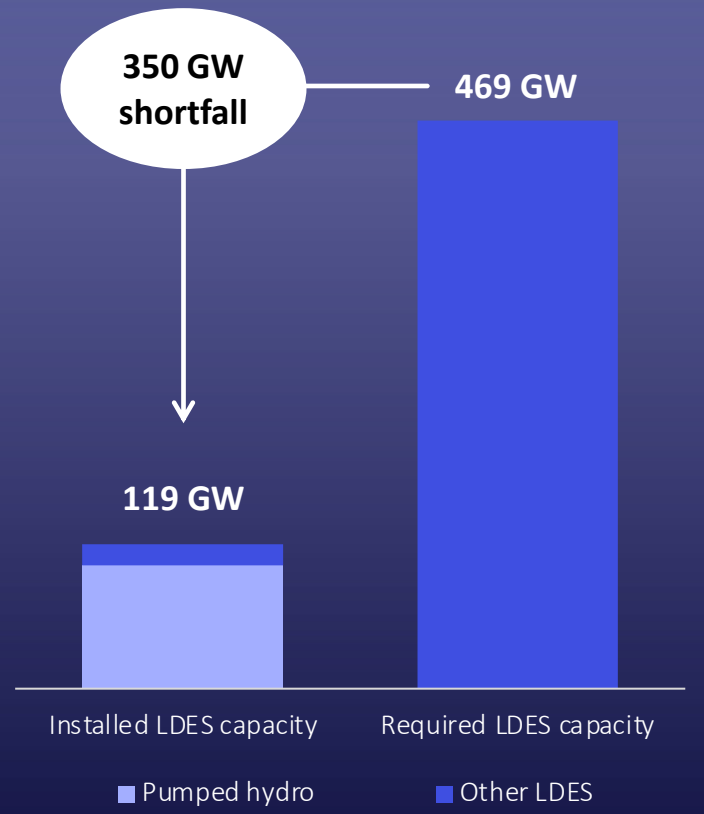
Solar Rapidly Accelerating, LDES Needs To Catch Up

350 GW shortfall for electrochemical LDES to already address today

Solar generation and storage capacity: 2021 - 2040 (GW)



2025 LDES capacity vs needs (GW)



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State Of Play

Market supported by favourable tailwinds but faces maturity challenges

Strategic support

Momentum accelerating through increased strategic partnerships and investments

AI

Optimising smart charging and grid services, increasing revenue potential

Policy

Market mechanisms and policies starting to reward longer duration

Application fit

Decreasing LFP costs forcing players to be selective on applications and show value today

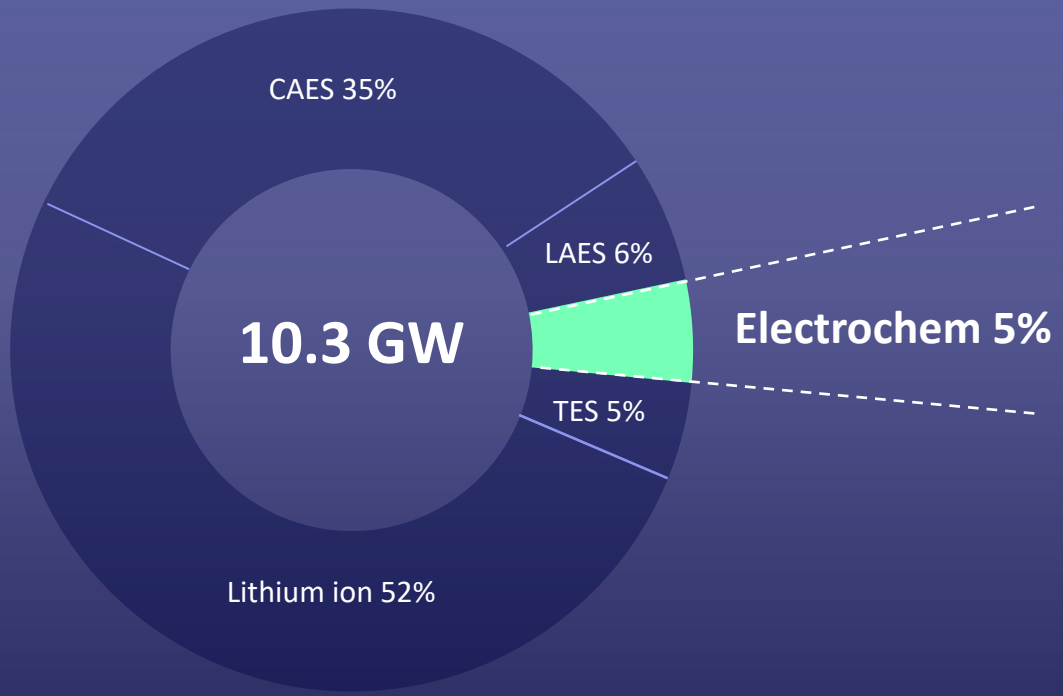
Track record

Limited projects operational with most below 100 MWh, players need experience at scale

Business model

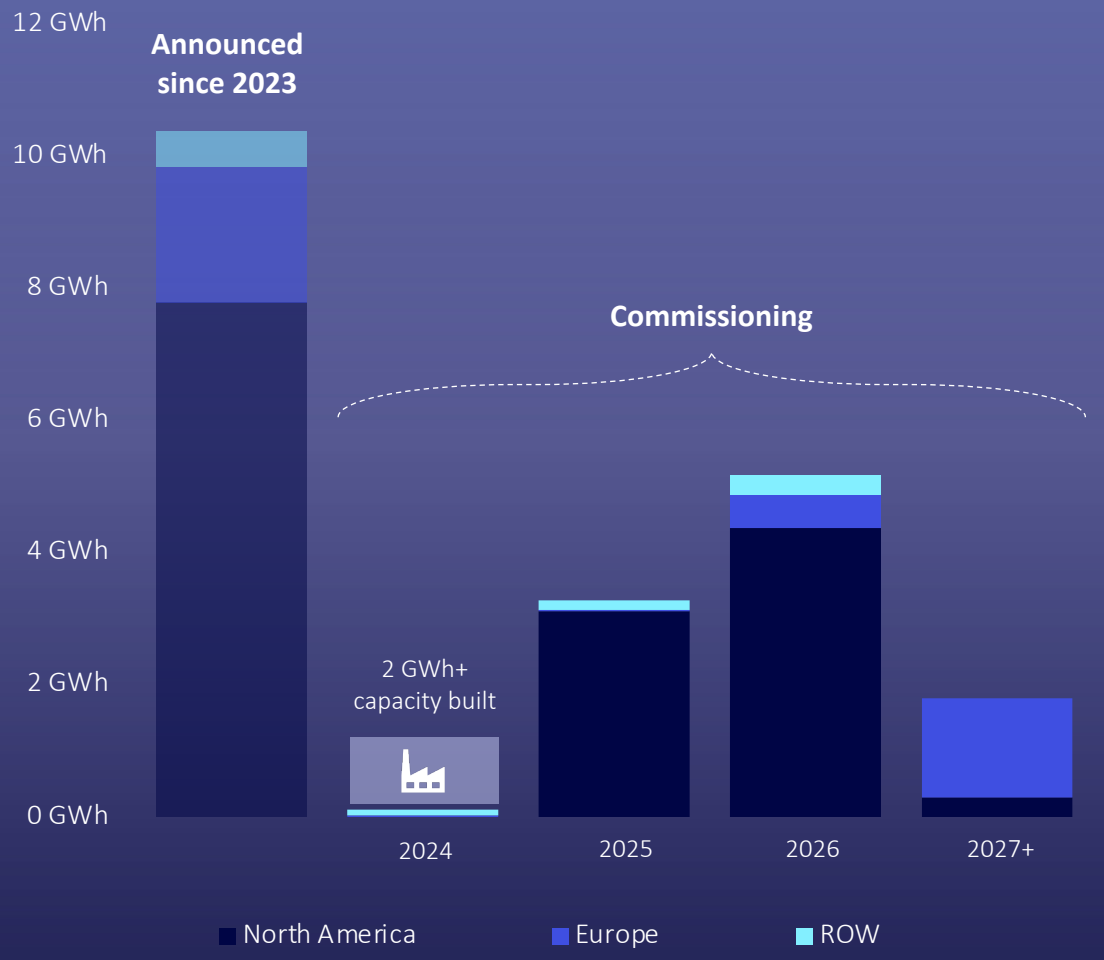
Complex and rapidly evolving market requires flexibility, several players now bankrupt

Only 10 GWh Of Announced Electrochemical Projects & Partnerships Since 2023

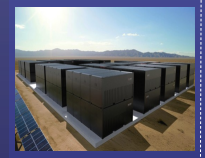


Form energy	**6.5** GWh	PG&E, Georgia Power, Xcel Energy, Dominion Energy
INVINITY ENERGY SYSTEMS	**2.1** GWh	nationalgrid, FrontierPower, U.S. DEPARTMENT OF ENERGY
eos	**1.1** GWh	PINEGATE RENEWABLES, City Utilities, INTERNATIONAL ELECTRIC POWER, Dominion Energy
ENERVENUE	**0.6** GWh	VEDANTA ENERGY STORAGE SYSTEMS, RWE, HCE

Commercialisation Is Getting Underway



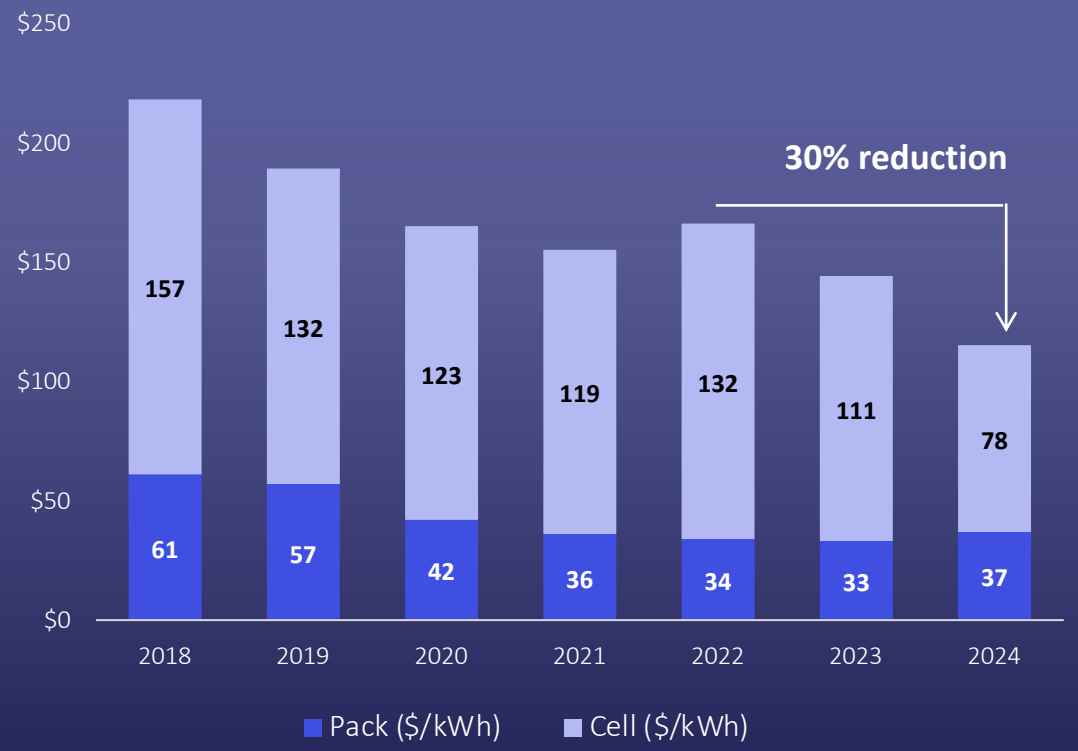
2 GWh+ new production capacity built, ready to meet demand

INVINITY ENERGY SYSTEMS	H2	Natron Energy	FLOW TECH	INVINITY ENERGY SYSTEMS	Form energy	e-zinc
200 MWh	330 MWh	600 MW	100 MWh	500 MWh	520k sqft	42k sqft
						
Operational Jun 2023	Operational 2023	Operational Apr 2024	Operational Jul 2024	Operational Jul 2024	Operational Sep 2024	Operational Nov 2024

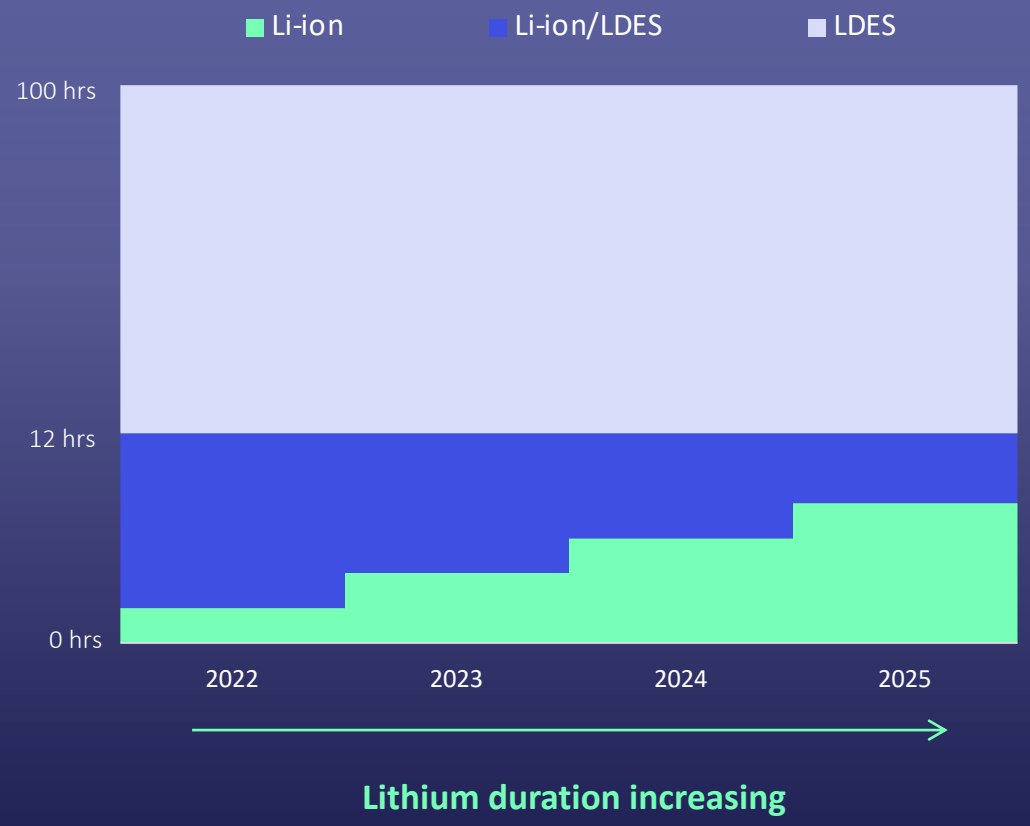
Lithium Pushing LDES Into Longer Durations

Lithium competing into higher durations, LDES players need to refine application fit

Volume-weighted average lithium-ion battery pack and cell price split



LDES maturing into longer duration applications



Investment In LDES Is Picking Up

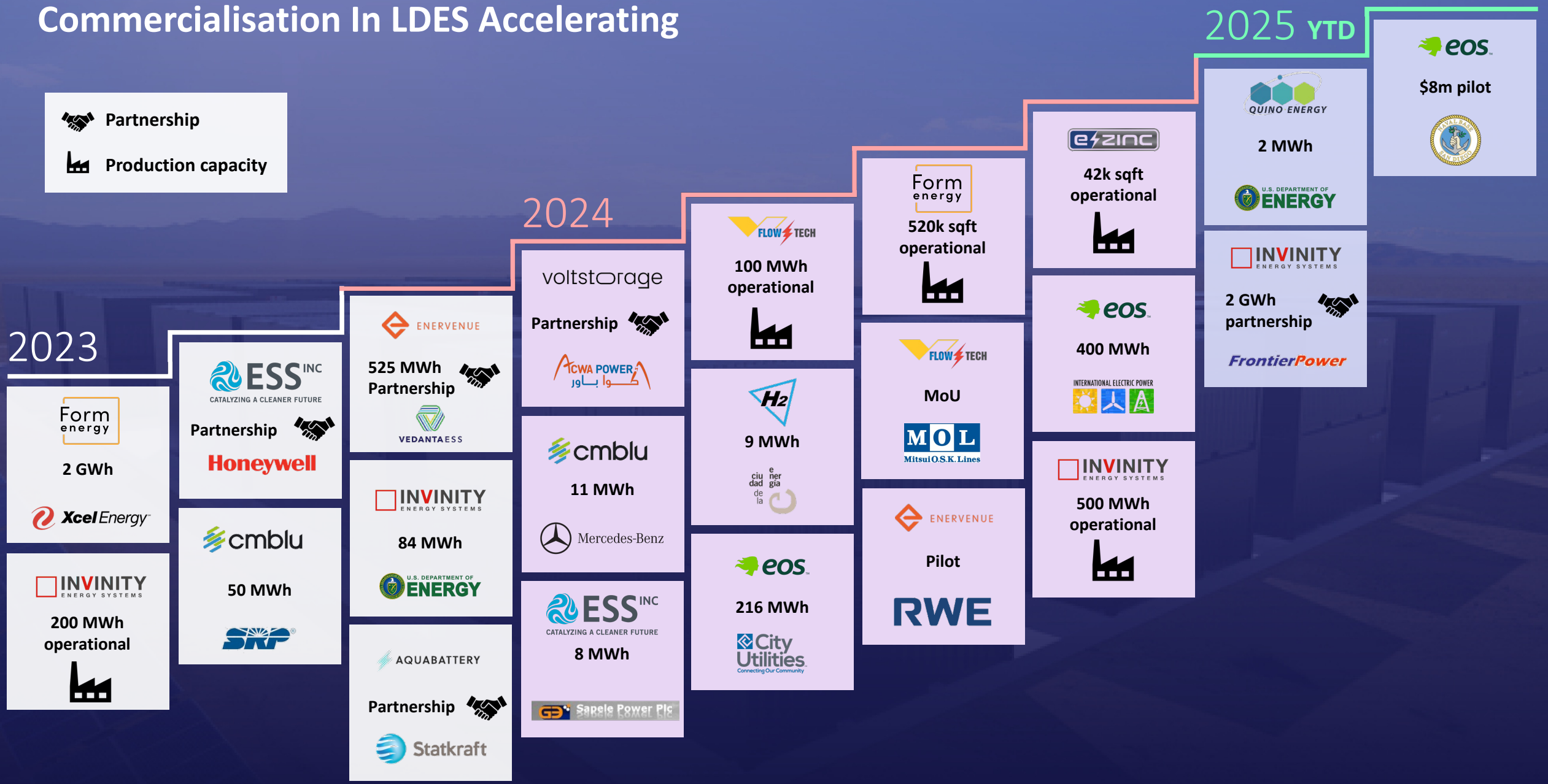
2023
$350m+

2024
$1.5bn+

2025 YTD →

eos $72m Public placement	Natron Energy $255m Series B Public placement	AQUABATTERY $6m Seed InnoEnergy	eos $316m Public cerberus	e-zinc $31m Series A Mitsubishi Heavy Industries	Form energy Undisclosed DBJ Development Bank of Japan	
H2 $18m Series C posco	FLOW TECH $10m Series A wavemaker partners	ESS INC CATALYZING A CLEANER FUTURE $28m Placement Honeywell	REDOX ONE $20m Series A tharisa	INVINITY ENERGY SYSTEMS $73m Public Infrastructure Bank	PEAK ENERGY $55m Series A TDK Ventures	Form energy $405m Series F T.RowePrice	H2 $16m Bridge STIC
INVINITY ENERGY SYSTEMS $21m Public placement	voltstorage $33m venture debt European Investment Bank	cmblu $106m Corporate STRABAG	LARGO Acquisition STRYTEN ENERGY	ENERVENUE $308m Series B slb	allegro $12m Series A Grantham Foundation for the Protection of the Environment	ENZINC $8m Series A Tovc	FLOW TECH Venture debt HOKKOKU FINANCIAL HOLDINGS

Commercialisation In LDES Accelerating



LDES needs to scale faster

50x faster deployment needed to reach 8 TW by 2040

Commercial maturity

Gain operational experience, use capacity to scale in 2026+

Electrification accelerating

1.5x demand driven by EVs, data centres, industrial heat

Consolidation

Weaker technologies phasing out, need to prove value today

Policy support ramping up

UK & Australia setting up schemes to reward 8+ hour LDES

Technology

Increasing role for AI to optimise charging & grid services

Expert Panel



Brett Simon

e-zinc



Manny Claassens

ENERVENUE



Fredrick Støa

equinor



Alex Campbell

LDES
LONG DURATION ENERGY STORAGE COUNCIL



Dr. John Alper

voltstorage



‘Metallizing Energy’ in Zinc

Storing electricity in metal

Company Snapshot

Based in **Toronto, Canada**

Founded in 2013

55 FTEs and 7 consultants

Raised ~**$80M in private financing**

Awarded **$18M in grants**

7 patent families with international coverage

First in-field deployment Q2 2022

2 demonstration projects secured



James Larsen
CEO



Rhonda Landers
CFO



Rob Howard
COO

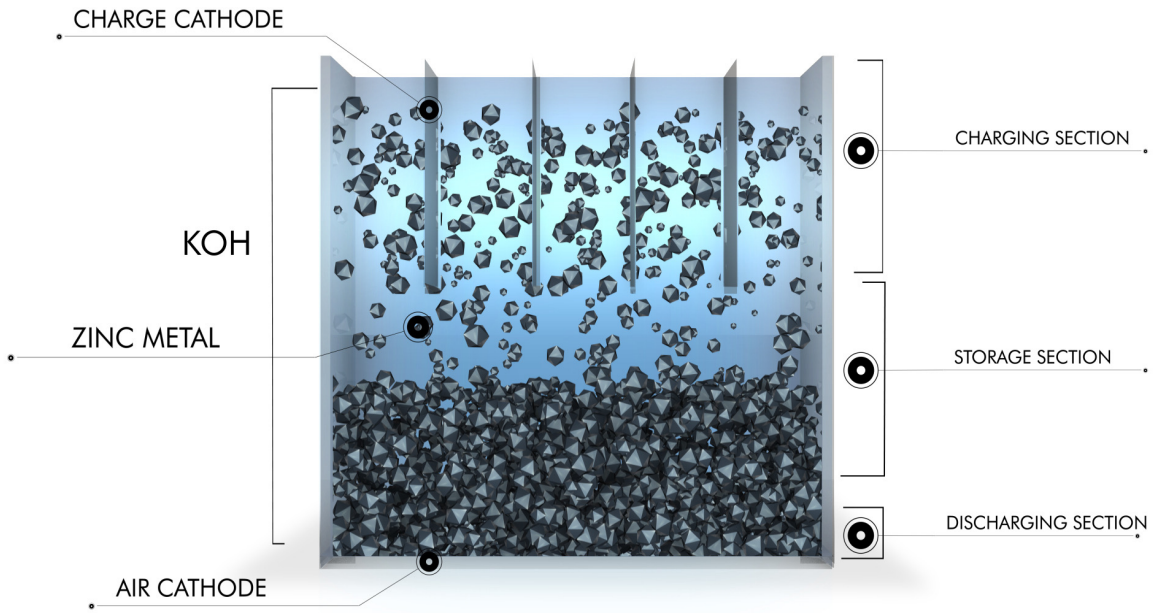


Balki Iyer
CCO



Laura Strickler
VP People & Culture

Zinc as an “energy carrier”



1. Electrochemical cell with zinc-air chemistry
2. Stores energy through the creation of zinc as a metal
3. Low capital cost by decoupling energy capacity from power

Competitive Advantages



Long lifetime

15+ years expected lifetime with minimal degradation



Large operating temperature

-10°C to 45°C operating temperature range



Fire safety

Non-flammable electrolyte with no risk of thermal runaway, obtaining UL certifications

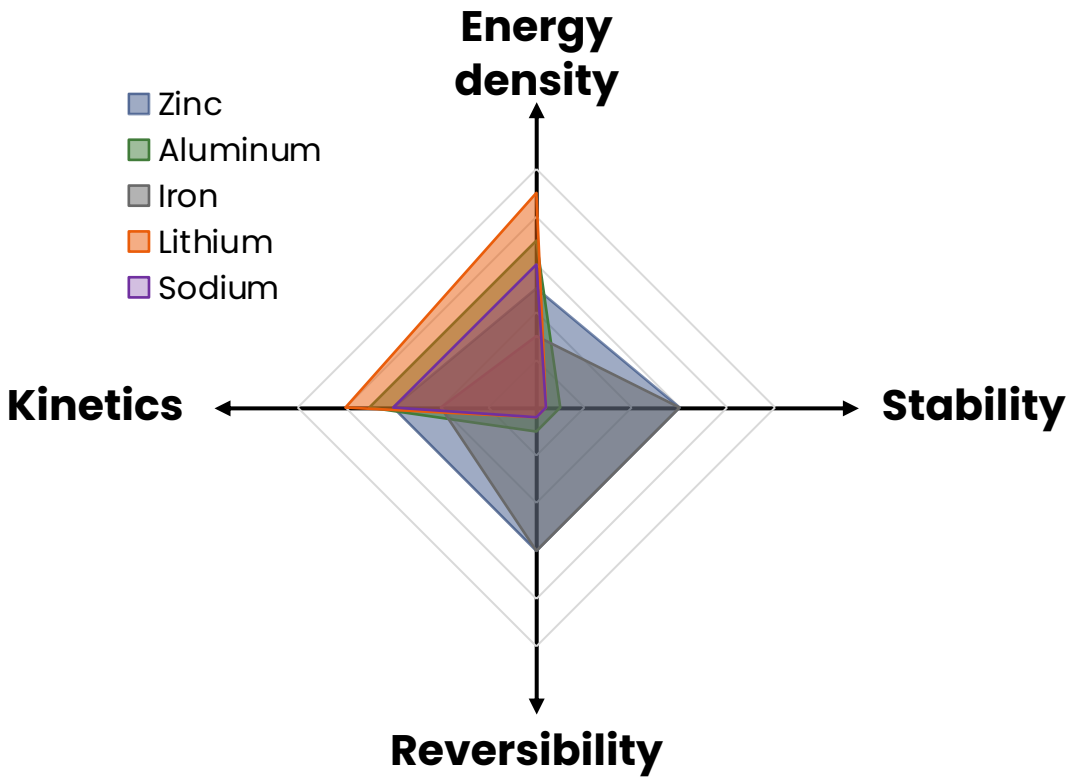


Recyclable / reusable

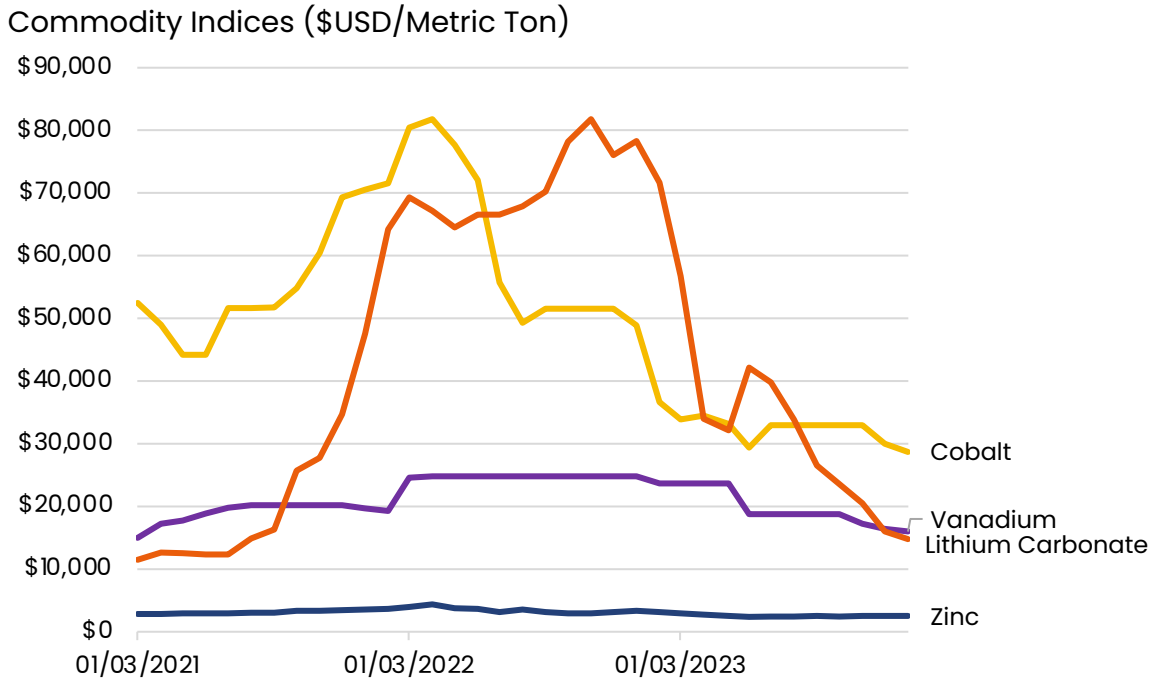
Commodity materials are fully recyclable at end of life

Why Zinc?

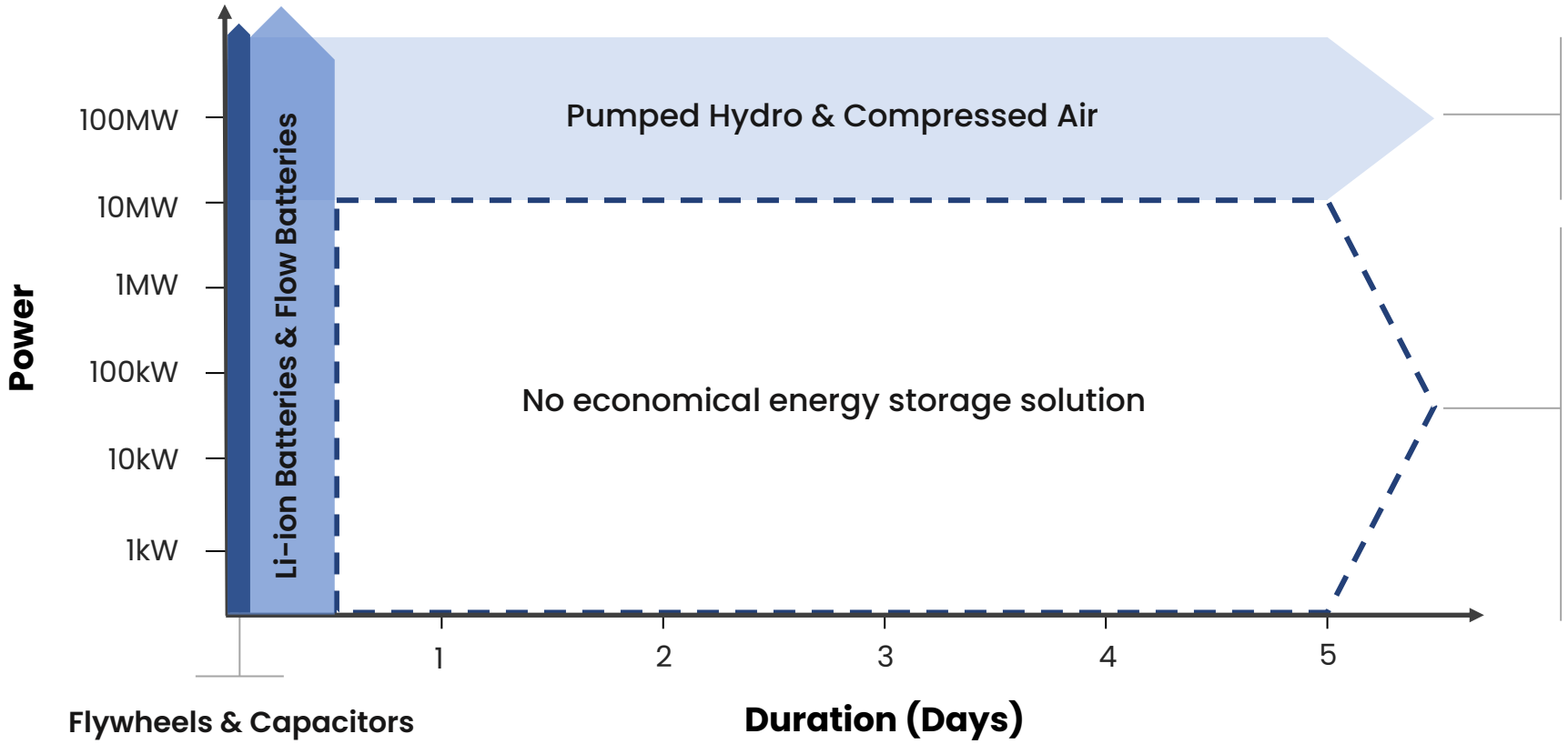
Favorable electrochemical properties



Cheap and reliable commodity prices



Market Opportunity



Long-term Market:

Utility scale FTM installations integrating with renewables

Initial Target Market:

Small/mid-scale (<10MW) & long-duration (>10 hours)

Resilience & Remote power (often served by diesel generators)

Initial Target Market: Resilience & Remote

Phased Go-to-Market Approach

Horizon I: **Resilience**	• Commercial & Industrial • Municipalities, Universities, Schools and Hospitals	• Resilience • Bill Management • Wholesale Market Energy • Diesel Abatement
Horizon II: **Remote**	• Mining operations • Remote communities • Upstream oil and gas	• Resilience • Diesel Abatement • 100% Clean Power
Horizon III: **Renewables**	• On-grid renewables balancing • Seasonal storage	• Renewable Time Shifting • Transmission and Distribution Deferral • Grid Reliability

Go-Forward Plan

2024
Establish Pilot Manufacturing

2025
Build and internally test CEC system

2026
Deploy CEC Project

2027
Deploy Toyota Tsusho project

2028
Establish Scale Manufacturing

2029+
Deploy pre-commercial pilots

Commercial Sales



Brett Simon, Director of Commercial Strategy
brett.simon@e-zinc.ca

ENDURING ENERGY



ENERVENUE

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Augment Your Expectations, Not Your Battery



EnerVenue is challenging conventional energy storge design with its differentiated technology

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Technology Timeline

Mature, proven technology used in outer space applications for 30+ years

1980s

Metal-Hydrogen deployed by NASA

- Mars Rover
- Space Station
- Hubble Telescope
- **30+ years**
- **200 million cycles**
- **100,000 charge and discharge cycles**

2017

Stanford Professor Yi Cui refines NASA battery technology

- New materials
- Reduced costs
- New catalyst

2020

EnerVenue spun-out of Stanford's business accelerator

- 30,000 cycles
- 30 years
- 3 cycles per day
- Improved fire safety
- Non-lithium

2025



Energy Storage Vessel™ production underway

- Commercialized solution
- Pilot projects with major utilities & commercial energy users
- Fourth generation in manufacturing validation

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Traditional Energy Storage Challenges

Traditional energy storage technologies have a role to play in meeting the demands of the energy transition but are limited in their applicability by cost and safety concerns

Fire and explosion risk



High operating & maintenance expenses



Incapable of longer duration & dispatch



Limited cycle life



Restrictions on over-charge and over-discharge



Harsh climates: hot deserts & freezing winters



Flammable liquids and toxic materials



High chemistry, adoption and technology risks



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Most Durable and Reliable Battery Technology

Energy Storage Vessels are designed to operate in extreme temperatures for 30+ years, offering the longest cycle-life of any battery system

Li-ion			
Fire and explosion risk	High operating & maintenance expenses	Incapable of longer duration & dispatch	Limited cycle life
No thermal runaway risk No need for fire suppression	**No augmentation No routine maintenance**	**Flexible charge/discharge range C/2 to C/12**	**30+ year lifespan ~30,000 cycles, 3 cycles/day**
Restrictions on over-charge and over-discharge	Harsh climates: hot deserts & freezing winters	Flammable liquids and toxic materials	High chemistry, adoption and technology risks
Excellent overcharge, discharge and deep-cycle	**Technology capable of -40°C to 60°C ambient**	**Non-toxic, no lithium, easily sourced**	**Proven in 30+ years of use in space applications**

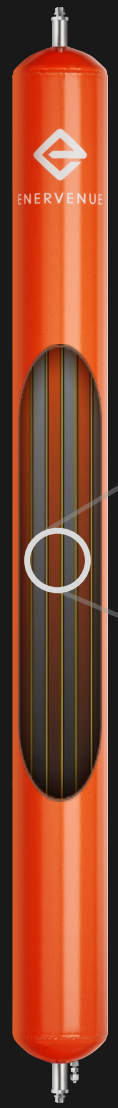
Li-ion = Challenge with Lithium-Ion technology

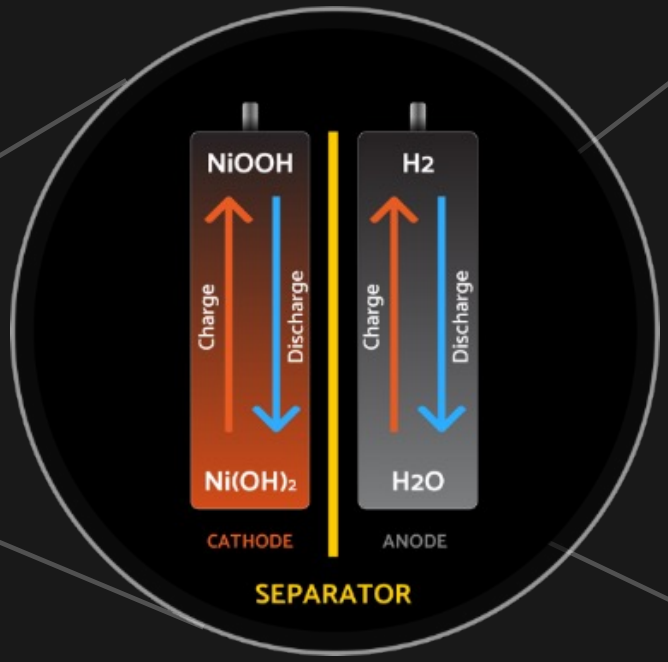
= Advantage with EnerVenue technology

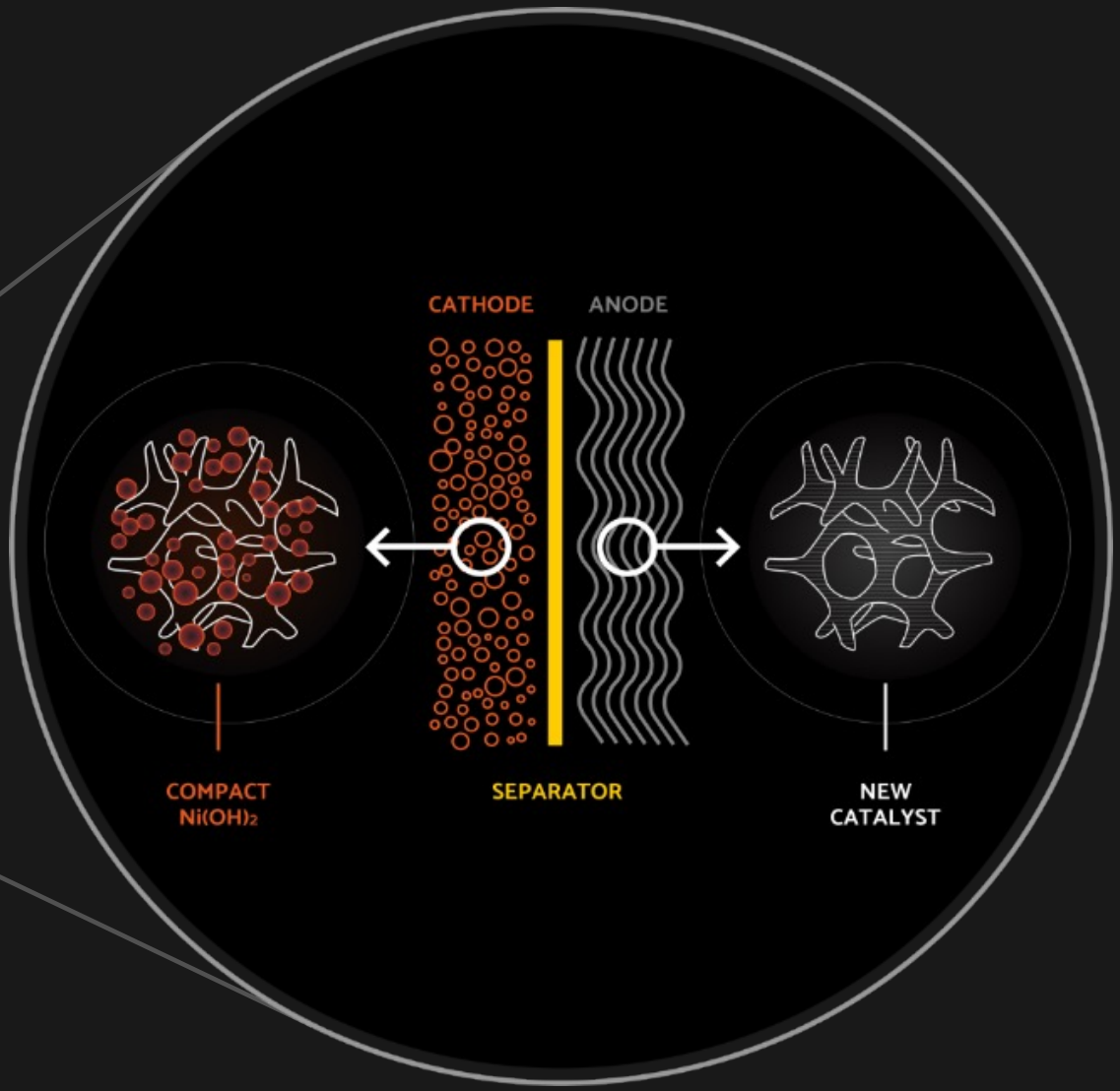
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EnerVenue Energy Storage Vessel

30+ years mature technology upgraded with new low-cost earth abundant durable catalyst and design improvements



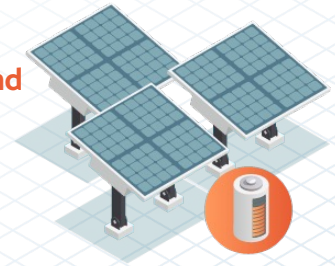




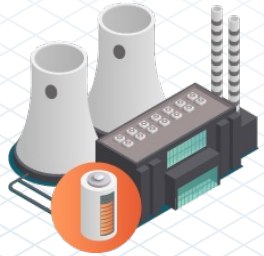
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Grid-Scale Applications

EnerVenue is changing the way electric utilities are thinking about battery energy storage systems



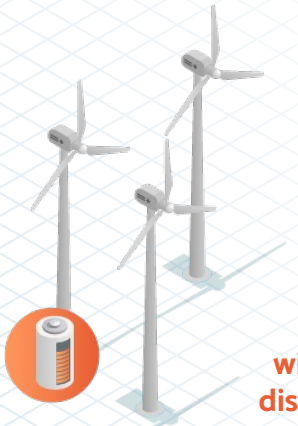
Solar smoothing and peak shaving to improve dispatchability



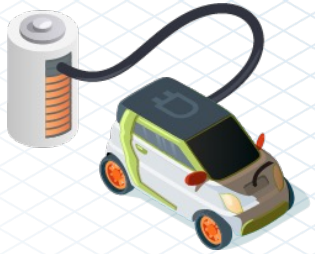
Manage C&I loads to reduce demand during peaks, aggregate BESS assets



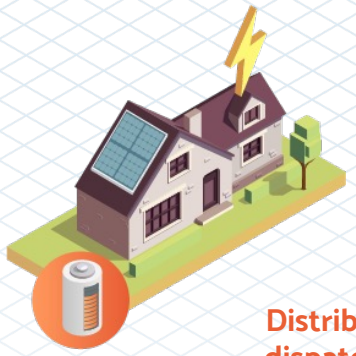
Standalone BESS for grid ancillary services, energy shifting



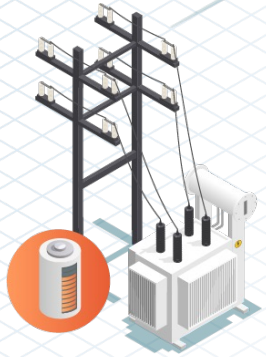
Improve wind turbine dispatchability



BESS to support EV charging



Distributed, utility-controlled, dispatchable residential BESS, aggregate BESS assets



Congestion relief via real and reactive power control, T&D deferral

ENERVENUE CAN DO IT ALL...

DURABLE 30,000 cycles, 30 years, 3 cycles/day

FLEXIBLE Multiple use cases per day

SIMPLE Minimal OPEX with no augmentation

SAFE No thermal runaway risk

PROVEN Refined by NASA and Stanford

	LITHIUM-ION	ENERVENUE
Daily Cycles	1 With Resting Period	1-3 Continual Cycling
OPEX (% CAPEX/yr)	3 %	0.5 %
Augmentation	Yes	No

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EnerVenue as a Flexible Asset

No other battery offers the range of application possibilities



- Safer, with no thermal runaway, and capable of 2- to 4-hour flexible cycles



- Perform multiple daily cycles, charging and discharging at different rates to maximize revenue

High Efficiency



- Address the growing market for long duration energy storage

C/2 **Customer values safety**

Customer values cycle life

Customer values duration C/12

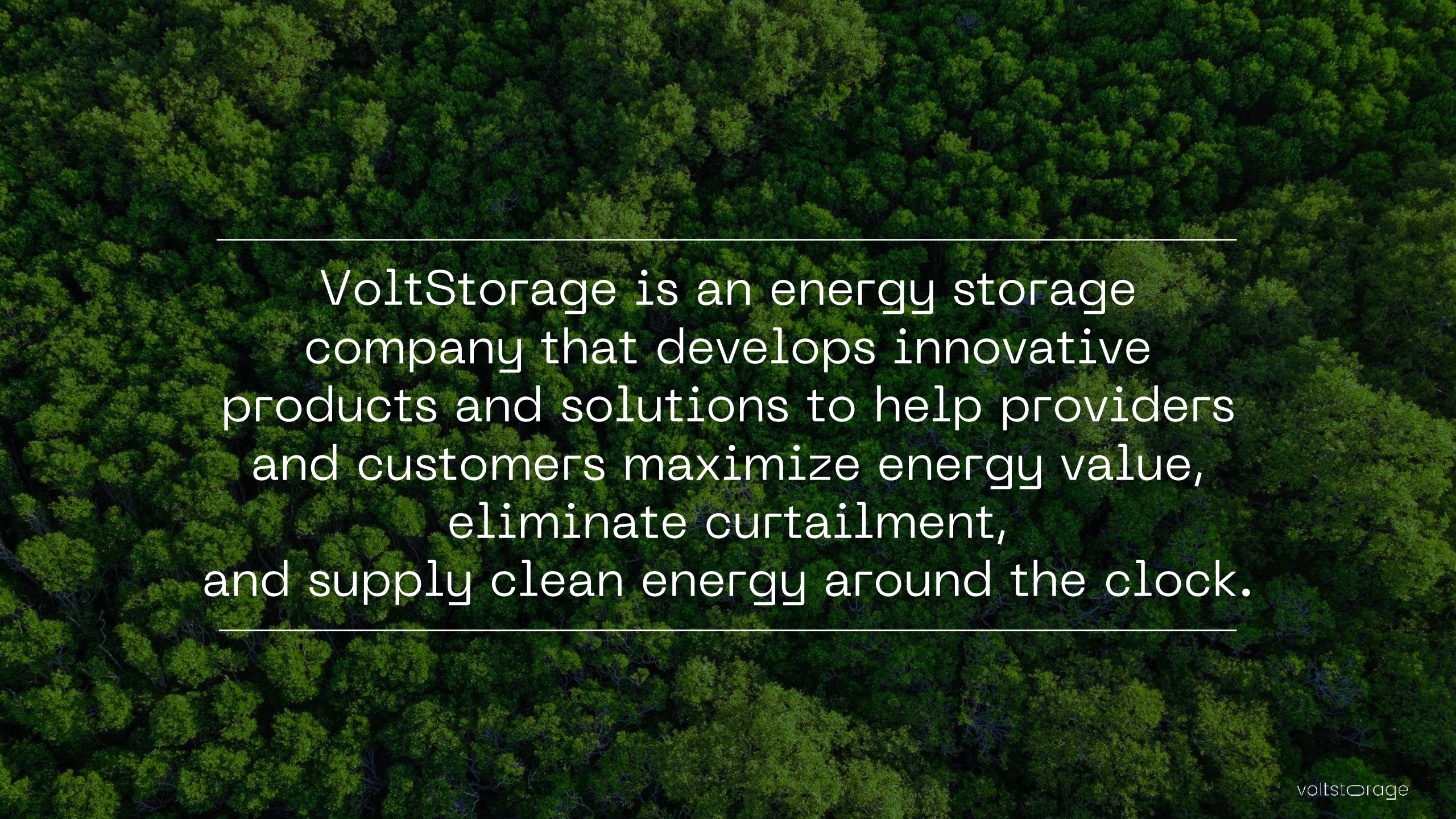
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Thank You!

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voltstorage
VoltStorage
Long duration energy storage

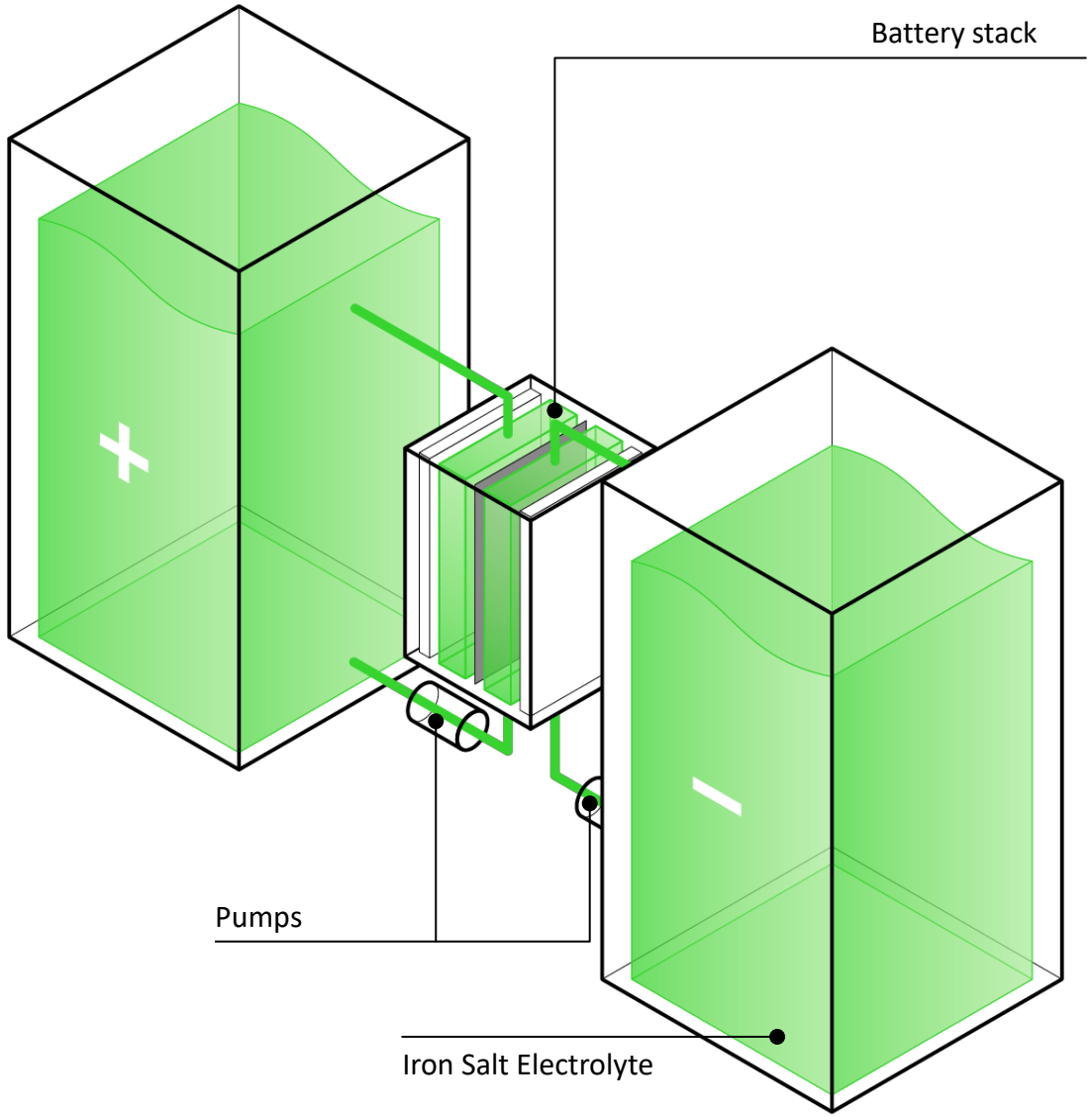

VoltStorage is an energy storage company that develops innovative products and solutions to help providers and customers maximize energy value, eliminate curtailment, and supply clean energy around the clock.
voltstorage

The Iron Salt Battery Principle

Ultra low-cost and durable battery technology

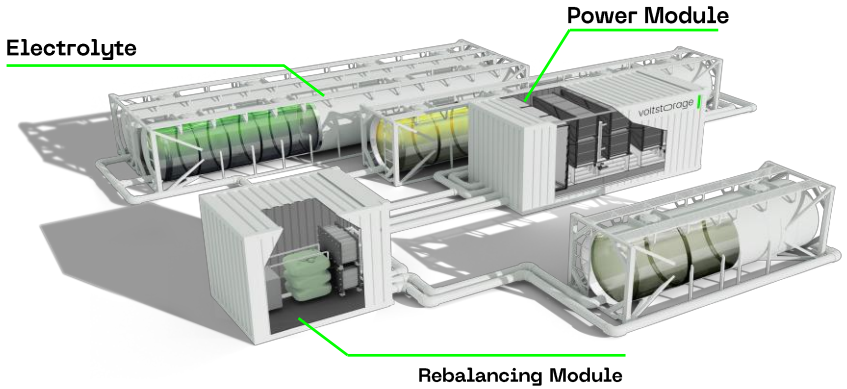
Based on well know flow battery principles, VoltStorage developed the novel and proprietary ISB technology tailored for the Long-Duration Energy Storage (LDES) segment

01	Durations of 10 – 48 hours
02	Modular and scalable from MWh to GWh
03	20+ year lifetime
04	Temperature stability up to +50°C
05	Abundant, non-toxic materials only

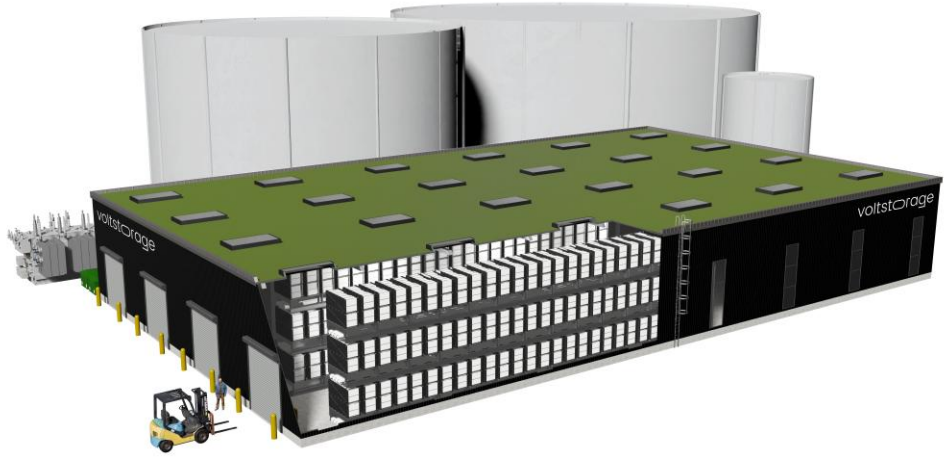


VoltStorage's Iron Salt Battery is the lowest cost and most scalable LDES solution

Main Components of our Iron Salt Battery



Installation at Scale 2027+



50 MW/1 GWh
20-hours VoltStorage Iron Salt Battery installation, duration and scale fully customizable for specific use case

The Iron Salt Battery technology fits every need for LDES worldwide



Lowest Cost

ISB technology is among the lowest cost options in the LDES space

And thanks to the proprietary VoltStorage technology, the capacity degradation is negligible to ensure a 20+ year lifetime



Flexible Duration & Scalability

With customizable durations from 10–48 hours und storage capacities from MWh to GWh, any application and need can be fulfilled



Deployable everywhere

The ISB technology has no geographical requirements and can operate in any condition, up to 50°C ambient

With a low footprint of up to 200 kWh/m², a ISB installation fits everywhere



Abundant & Safe Materials

Utilizing only abundant and non-conflict materials, that can be sourced anywhere and recycled well after use

Not flammable electrolyte/ Nontoxic materials and inherent safety measurement makes the ISB technology easy to install and operate

LDES is the most economic solution in various use cases



Wind and PV Firming

Mitigate curtailment costs & provide flexible load and generation to the grid



Industry & Data Center Supply

24/7 electricity supply to industrial processes and data centers by co-location or 24/7 PPAs



Gas Peaker Alternative

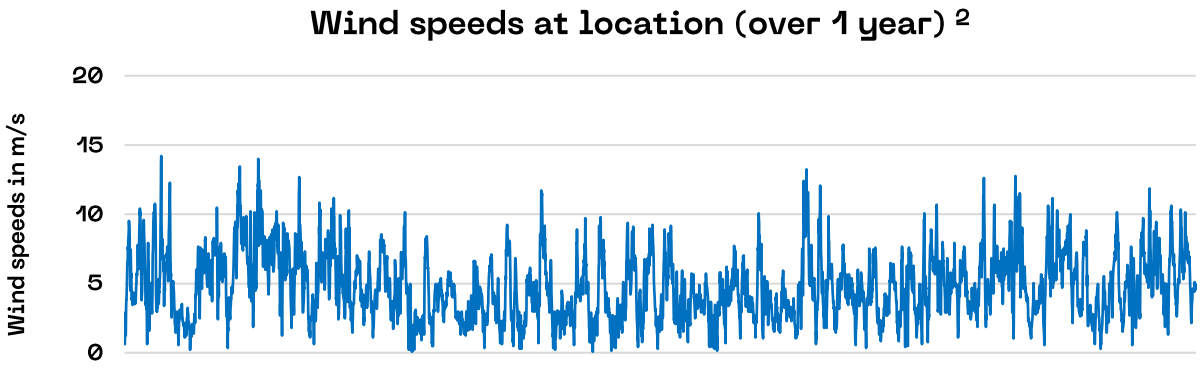
CO_2-free flexible generation and reserve capacity to bridge the rising flexibility gap

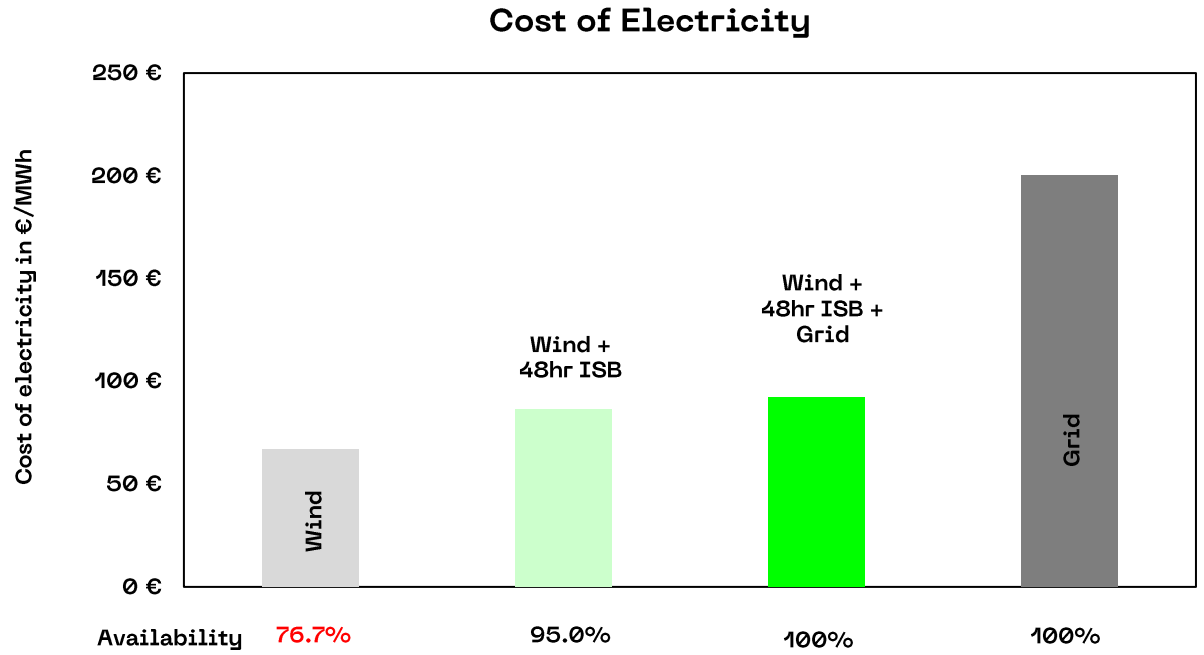
LDES is the ideal solution to solve all the issues with intermittent renewables and open new revenue streams

Use Case: Baseload for Industry (IRL)

Simulation inputs:
- Location: Ballyfad, Ireland
- Customer: windpark operator (offering PPA)







[1]: Eurostat (https://tinyurl.com/mr3ex9vp), as of Dec 2024
[2]: Hourly wind power data provided by JRC Europe (Geographical Information System) & NASA (https://tinyurl.com/5n6pee8r)

VoltStorage Locations



Team

Dr. Volker Schulte
CEO

Randall Selesky
CCO

Matthias Kosch
CFO

Bela Tisoczki
CHRO

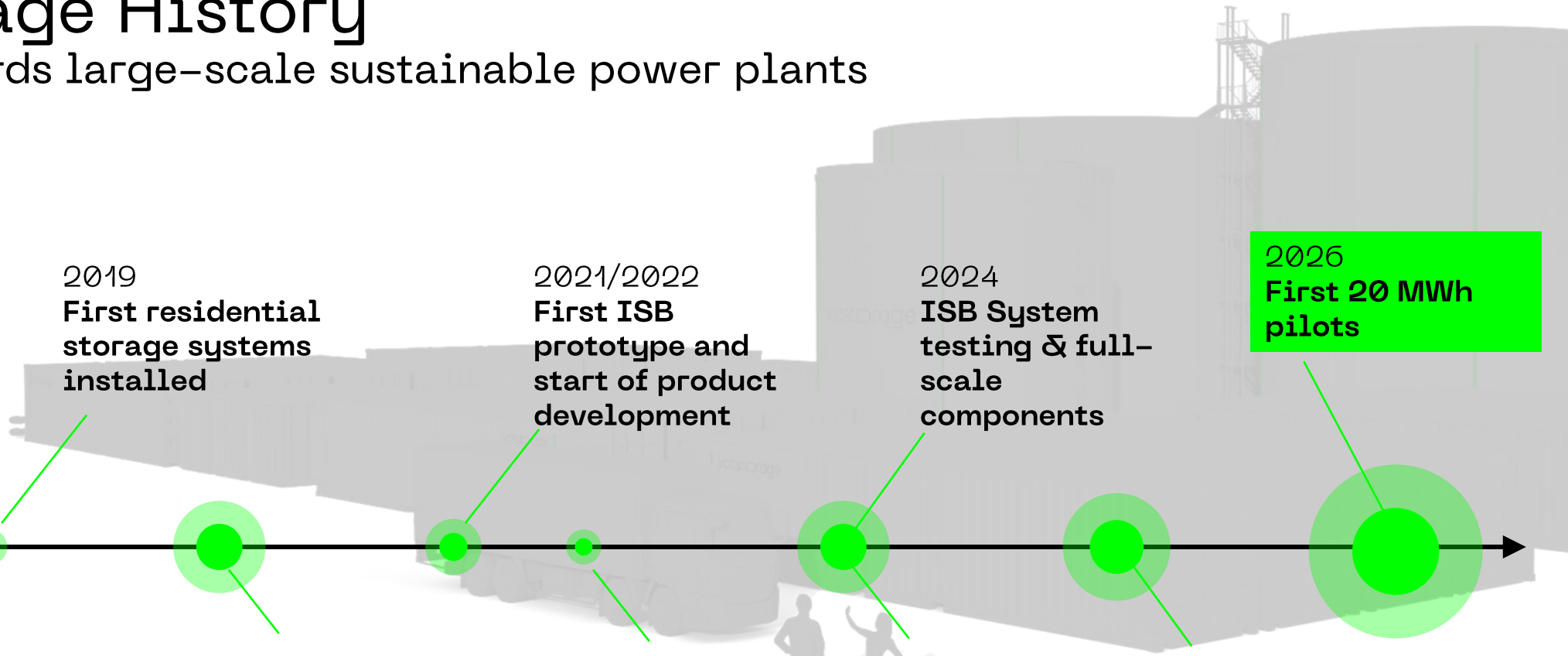
+
65 team members
from 15 different countries

Investors

Cummins · korys Invest. Inspire. · SUSV THE ACCELERATOR VC · kopa. · Bayern Kapital Venture Capital für Bayern · European Investment Bank · energie360°

VoltStorage History

Our path towards large-scale sustainable power plants



2016
Founding of VoltStorage

2018
Start of ISB Development

2019
First residential storage systems installed

2020
First ISB Patents

2021/2022
First ISB prototype and start of product development

2023
Move into new facilites

2024
ISB System testing & full-scale components

2024
First MOUs signed

Mid 2025
First MWh scale installation with customer in Germany

2026
First 20 MWh pilots

Let‘s have a chat!



John Alper, Ph.D.

john.alper@voltstorage.com

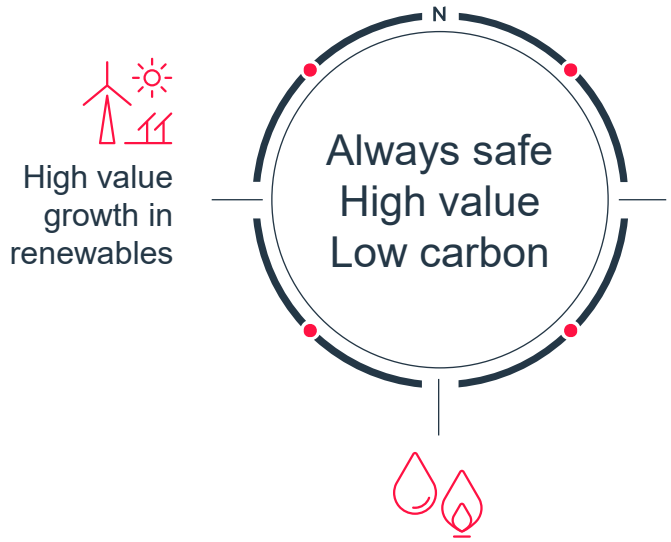
Equinor – A leading company in the energy transition

Turning natural resources into energy for people, and progress for society

Why we are changing

- Creating value through the energy transition
- Net-zero ambition gives new industry opportunities
- Technology excellence and innovation define winners
- Market dynamics set margins under pressure

Accelerating our transition



High value growth in renewables

New market opportunities in low carbon solutions

Optimised oil & gas portfolio

How we will get there - together

- Safe and secure operations
- Guided by our values
- Building on competencies and our experience
- Together as one team – engaging partners and society

ENERGY TRANSITION

Building resilient businesses for the future

VALUE DRIVEN & BALANCED APPROACH

Renewable power generation

GW capacity installed or under development EQNR share[1]



• 2.4 GW installed capacity

~7 GW

10-12 GW

by 2030

CO_2 transport and storage

Million tonnes per annum (mtpa), capacity installed or under development. EQNR share

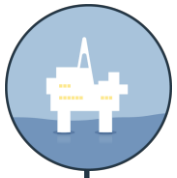


2.3 mtpa

• >60 mtpa of storage potential accessed

30-50 mtpa

by 2035



Emissions reduction

Reduction net scope 1 & 2 GHG emissions[2]
EQNR operated 100% basis

- Energy efficiency
- Electrification
- Infrastructure consolidation

34%

50%
by 2030



Net zero progress

Net carbon intensity reduction

- Baseline year 2019
- 15-20% by 2030
- 30-40% by 2035

2%

Net zero
by 2050

1. Includes Equinor ownership share in Ørsted and Scatec
2. Ambition to reduce emissions from our own operations by net 50% by 2030. 90% of this ambition will be realised by absolute reductions

Equinor "New Business and Investments"

PURPOSE

Build new industrial scale sustainable & profitable business for Equinor outside of current core – and support core business through venture investments that drive the energy transition.

2030 AMBITION

1	1-2	Handful	Strategic
new business established	incubators in scaling phase	of potential incubation options	venture portfolio

DEEP TECH

Insight and position to leverage disruptive technologies. Technology advice for investments in NBI

INDUSTRIAL VENTURING

Originate and execute on venture capital investments towards NBI strategy and identified needs of core business

STRATEGY & EARLY PHASE

Strategic positioning for potential future business build. Support strategy development in NBI

INCUBATION

Dedicated business build and active industrial ownership towards developing new value chains to industrial scale

Equinor VENTURES

strategy statement

We invest and collaborate with innovative companies, that:

- Drive the energy transition
- Create scalable opportunities
- Generate long-term value

Invest and collaborate with innovative companies
We acquire equity positions in companies with technologies and business models that have the potential to deliver positive and sustainable value. We provide capital and access to partnerships, pilots, and experience to test and scale disruptive technologies.

Drive the **energy transition**
We accelerate Equinor's development of sustainable and responsible energy that powers society. We identify deployable technologies with business-build potential.

Scalable opportunities
We invest in companies that have the potential to grow at industrial-scale.

Long-term value
We seek long-term value for portfolio companies, co-investors, Equinor and society.

Equinor Ventures | Strategically focused

Category	Carbon Management	Emerging Fuels	Power & Flexibility	Critical Resources	Future Operations
Examples of Business	CCUS	E-fuels	Offshore wind optimization	Lithium extraction	Digital Systems
	DAC/DOC	Low carbon fuels	Energy aggregators	Natural hydrogen	Asset of the Future
	Carbon markets	Green & Blue hydrogen	Solar value chain suppliers		Circular
	Carbon Capture as a Service		Energy storage		

What's Next for Electrochemical LDES?

Alex Campbell
Director of Policy and Partnerships
Long Duration Energy Storage Council
3 April 2025

The LDES Council is formed of ~ 60 companies, from start-ups to large corporates, in over 20 countries

TECHNOLOGY PROVIDERS



ANCHOR MEMBERS

Industry & services customers

Equipment manufacturers

Low-carbon energy system integrators & developers

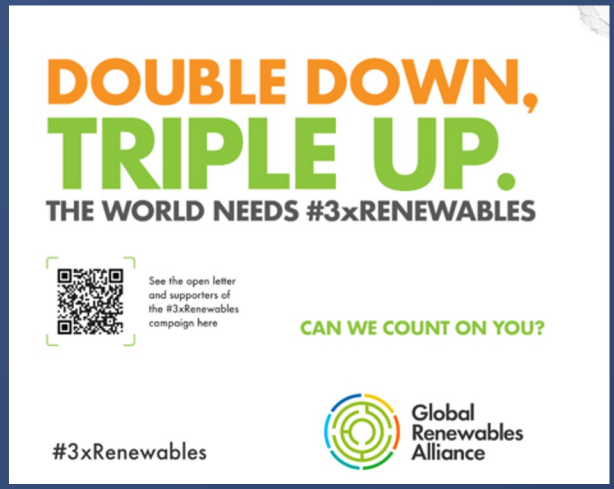
Capital providers

SERVICE PROVIDERS

LDES provides discharge energy continuously for **8+ hours**

- Multi-hour
- Multi-days
- Weeks
- Months, seasonal

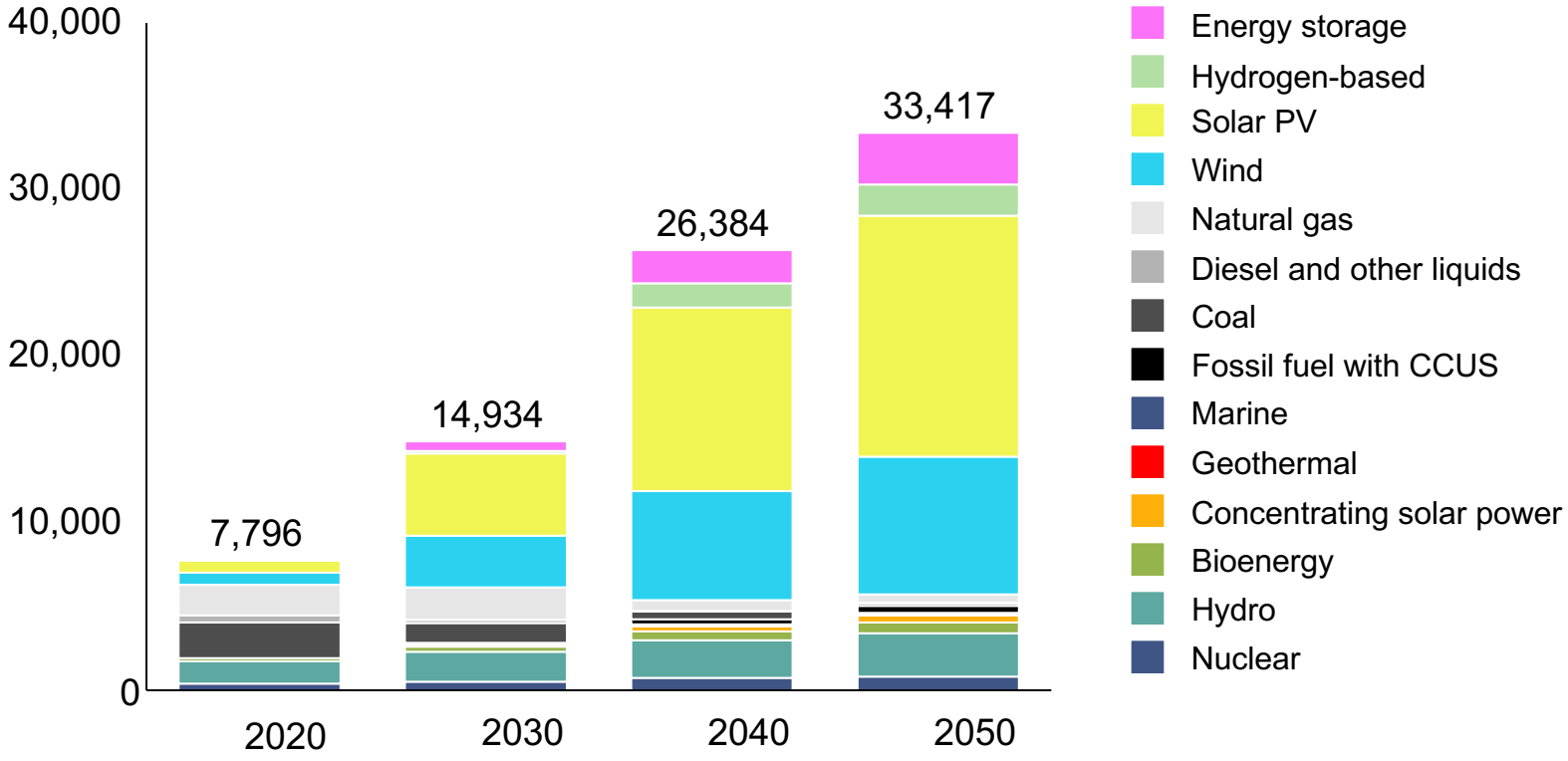
The LDES Council is a founder member of the Global Renewables Alliance



Decarbonisation of power will create a “flexibility gap”, requiring new resources to balance the net-zero grid – LDES can de-risk the transition

Power capacity especially of variable renewables – solar PV and wind – expected to increase significantly while conventional flexibility is phased out

Power capacity as modeled by IEA Net Zero by 2050 outlook (GW)

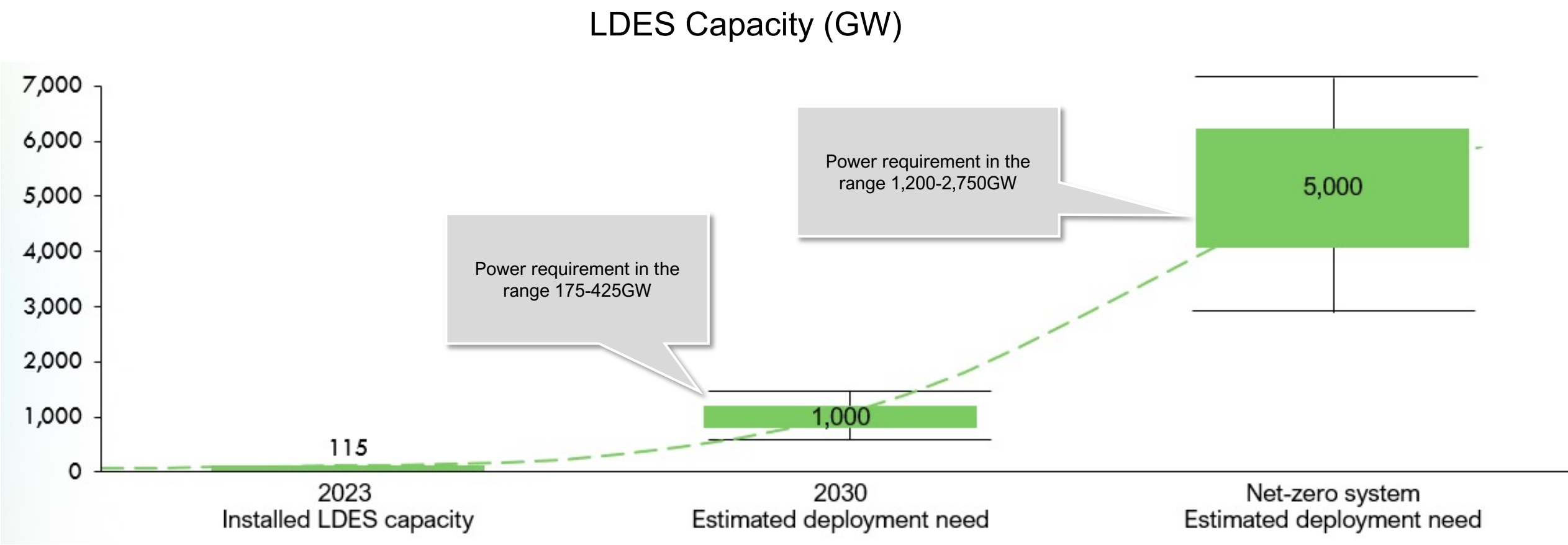


RES integration leads to new system challenges:

- Power supply and demand not always in balance
- Transmission flow changes potentially require costly and lengthy transmission upgrades
- Retirement of conventional, synchronous generators creates need for new sources of grid support services, e.g., reactive power, inertia

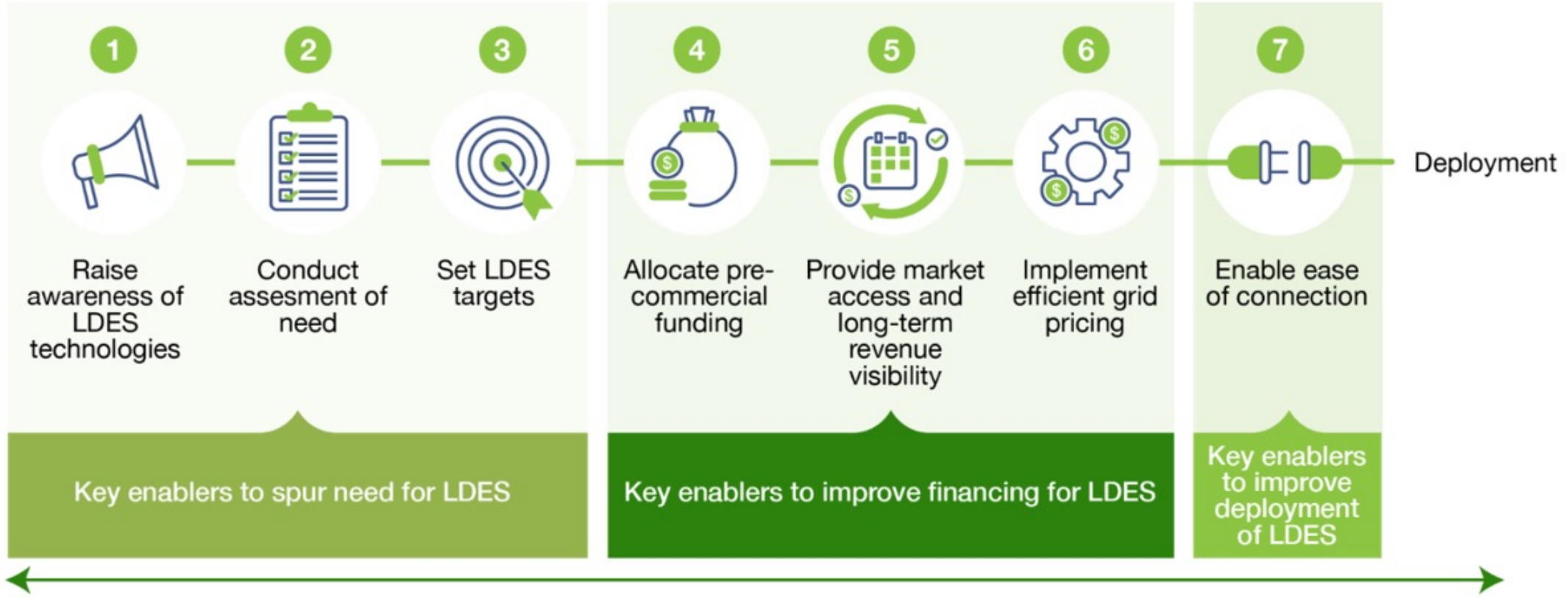
Source: IEA

LDES Council research shows that potentially more than 1,000 MW of LDES capacity is needed globally by 2030



Source: LDES Council Annual Report 2024, Systemiq analysis for LDES Council

The LDES Council outlines seven enablers for deployment



Source: LDES Council Annual Report 2024

Enabler 1: Raise Awareness of LDES Technologies



The India Energy Storage Alliance (IESA) organizes the annual World Energy Storage Day, raising awareness of the critical importance of all forms of energy storage, including LDES, with a global audience.

Enabler 2: Conduct Assessment of Need



The EU Electricity Market Design asks EU Member States to assess their flexibility needs – once each Member State has conducted this assessment need for LDES across the EU will be firmly established.

Enabler 3: Set LDES Targets



The Irish TSO has assessed the need for ~2.8 GW of LDES to support an 80% renewable grid by 2030. Consultation on an appropriate procurement mechanism now complete and decision expected soon.

Enabler 4: Allocate pre-commercial funding



At the start of 2024, the National Energy Administration (NEA) released a list of 56 new-type energy storage pilot demonstration projects, including 11 compressed air energy storage projects. Demonstrations at this scale enable fast learning and eventually quicker deployment of the best technologies, leading to lower costs overall.

Enabler 5: Provide long-term revenue visibility



The UK is introducing a ‘Cap and Floor’ mechanism for long duration electricity storage, operators will be able to secure a minimum revenue (the ‘floor’) and return excess above the ‘cap’ to consumers, providing investors with confidence in long term revenues.



In Italy system operator TERNA will being procuring long term contracts for LDES in 2025, paying a fixed price to developers for assets that will be under the direction of third parties.



In New South Wales (NSW), Australia, the latest NSW Roadmap competitive tender for long duration storage secured 1.03GW / 13.79GWh of capacity for three projects that will be awarded a ‘Long-Term Energy Service Agreement’ contract including 2x electrochemical projects.

Enabler 6: Implement efficient grid pricing



Current German legislation exempts energy storage assets from grid fees if they go online before August 2029, providing a near term incentive to LDES and other storage technologies.

Enabler 7: Enable ease of connection



Denmark is in the process of approving non-firm (or interruptible) grid connections in locations where these benefit the grid. Under this special contract, grid operators will have the authority to disconnect grid connections during peak times, offering a discount on grid fees in return.

Thank you

Our reports are at:
ldescouncil.com/insights/

Access the Annual Report

Email: acampbell@ldescouncil.com



