

WinterGreen Research, INC.

Buggy Whips for the Oil Industry: Power Point

Utility Scale Energy Storage: Major Disruption for the Industry,



Picture by Susan Eustis

Oil Industry on its Side.

Siemens driving prices down on flow batteries

Tesla sees the future of energy storage of renewable power

People want clean energy systems

Storage systems enable profitability and reduce project risk

\$15 Trillion to be Repurposed:

We call This a Major Economic Disruption

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Next Generation Utility Scale Batteries Permit Movement to 100% Renewables

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54 PAGES

2020

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About The Principal Author

Susan Eustis, President of WinterGreen Research, is a senior analyst. Ms. Eustis is a graduate of Barnard College. Ms. Eustis was named Top Woman CEO in 2012 by Who's Who Worldwide. She was named Top Woman Market Research Analyst in 2012, 2013, 2014, 2015, 2016, 2018, 2019, and 2020. She has been twice featured on the cover of the Women of Distinction magazine. She was cited in a recent Time Magazine article and major media articles on Youth Sports market growth. She was also featured in recent Wall Street Journal, New York Times, HBO, and London Times articles. Bloomberg and Barron's have had several quotes regarding cyber currencies and blockchain recently. She is chairman of the GBA (Global Blockchain Association) election committee developing election equipment standards, and has led some panels for that organization lately, most recently in the US Capital Administration room.

Susan Eustis has had an enduring interest in next-generation technology. After inventing the first electronic voting machine, she and a partner Ellen Curtiss who was a chartered financial analyst, started the company WinterGreen Research. Many next-generation products and markets were identified in the studies produced and sold by the company. In all, to date, 865 major market studies have been produced. Susan and Ellen together wrote a study on cardiac monitors that was the foundation of the patient monitor market and resulted in hospitals forming intensive care units. Without a way to monitor very ill patients, there was no ICU.

Susan wrote the first Internet study in 1995, predicting 100 million users within 5 years, and because the telecommunications companies that bought the study, including Siemens and many others, invested in that market, the prediction came true. Early on in the development of the cell phone market when fellow analysts were predicting 6% penetration tops in Europe and 3% penetration tops in the US, Susan predicted 95% penetration in 5 years, which was what happened. It helps senior executives in a large company to have an independent research study methodically lay out the path to a new market.

Many of the WinterGreen Research studies have been groundbreaking. The air medical transport study commissioned by Terry Schrier was carried to the financial community and resulted in the formation of the Air Methods company and the commencement of the air medical transport industry. The predictions of market growth held true and permitted the formation of a new industry. A series of studies of middleware messaging that was \$3 million market initially, tracked the market to \$21 billion and growing. The series of studies laid out market opportunity and market strategy.

A new set of studies on utility-scale energy storage platforms and Global Renewable Energy: 100% breaks ground in a new way. Disruption to the oil and gas industry represent a complete replacement of existing assets. Laying out the opportunities and the strategies for formation of next-generation utility scale energy platform markets is done in the context of demand from virtually everyone in the world for clean energy. In this case, energy storage platforms replace fuel from the ground. This level of complete disruption of the largest industry in the world economy is unprecedented. The opportunity in front of participants in the oil and gas industry and for existing battery companies is to embrace the next generation energy storage technology now that it represents an asset, not a boat anchor. Companies that embrace the next generation utility scale energy storage will supplant the existing coal, oil, and gas industry as it goes the way of buggy whips.

WinterGreen Research is an independent market research firm.

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