

Innovation Agora in Review March 10–14, 2025

Moving Ahead: Energy strategies for a complex world







Innovation Agora

The Innovation Agora at CERAWeek convened an energizing community of visionaries, technologists, startup entrepreneurs, VCs and investors, policy makers and corporate innovators—all committed to exploring new pathways for lower emissions, affordability and reliability.

Our focus is on showcasing and advancing transformational technologies—including those in AI and digital, renewables and e-mobility, hydrogen and CCS, advanced nuclear, decarbonization and electrification, quantum networks and computing, robotics and drones, advanced materials, smart cities and the built environment, workforce development and more.

The Agora is a vibrant marketplace of ideas on energy innovation, emerging technologies and solutions—with opportunities to learn, connect and ideate.

We offer many thanks to our Partners for their collaboration and commitment to the Innovation Agora and its mission. We are deeply thankful to our speakers, Partners and participants for their engagement—and their contributions to making Agora a unique and valuable gathering of the global energy community.

Sincerely,

Ken Downey

Executive Director & Conductor, Innovation Agora S&P Global Commodity Insights Jamey Rosenfield

CERAWeek Founder, Co-Chair & Instigator; Senior Advisor, S&P Global Atul Arya

SVP & Global Energy Strategist, S&P Global; Agora Mastermind, CERAWeek Steering Committee

CERAWeek 2025 Highlights

Speakers

1,470+

Speakers from 45 countries

84

Ministers & Top Officials from 29 countries

572

C-Suite Executives

348

Women Speakers

275

Startups

Sessions

650 +

Sessions

53

Partner Forums & Summits

13

Expert Zones

222

Agora Pods

9

Agora Houses

100+

NextGen Sessions 90+Inaugural Cohort Members

Community

10,000+

Participants

2,350+

Companies

129

CERAWeek Partners

445

Government & Regulatory Officials

2,400+

Women Participants

89

Countries

Social Media

1b+

Total Views

61.3k+

Followers +23% YoY

Press Coverage

365

Accredited Global Journalists

~25%

International Journalists

3

Onsite Studios CNBC, Bloomberg, Yahoo Finance



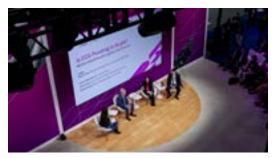
Scan or click here to view the CERAWeek in Review 2025 in its entirety

About CERAWeek

CERAWeek is comprised of three mutually reinforcing platforms designed to share ideas and foster relationships.



The **Executive Conference** provides an integrated framework for understanding what's ahead for global energy markets and geopolitics. Sessions focus on the most relevant themes and topics for the energy industry addressed by the most prominent voices in the industry.



The Innovation Agora is an immersive and dynamic program advancing the energy innovation ecosystem and fostering solutions to the greatest challenges. The Agora utilizes creative interactive formats to foster an open marketplace for ideas, dialogue, experiences and connections. New for 2025 was The Nexus, a space designed to ignite new ideas; and NextGen, a program that deepened connections between academia and industry, and attracted the world's top technical talent.



Partner Programs include Leadership Circles—exclusive gatherings designed to promote high-level interaction among senior executives and officials; EPICs (Energy Partner Informal Dialogues)—dialogues with senior public officials; and programs that foster engagement by emerging leaders and communities.

CERAWeek 2025 Leadership

CERAWeek Steering Committee

Daniel Yergin, CERAWeek Chair & Vice Chairman, S&P Global

Jamey Rosenfield, CERAWeek Founder & Co-Chair and Senior Advisor, S&P Global

Louis Carranza, Managing Director & Head of CERAWeek, S&P Global

Atul Arya, SVP & Global Energy Strategist, S&P Global

Roger Diwan, VP, Executive Director CERAWeek Content, S&P Global

 $\textbf{Carlos Pascual,} \ \mathsf{SVP}, \ \mathsf{Global Energy} \ \& \ \mathsf{International Affairs}, \ \mathsf{S\&P} \ \mathsf{Global}$

Richard Slucher, VP, CERAWeek, S&P Global

CERAWeek Management Team

Georgina Campero Aguilar, Director, Executive Conference Program

Louis Carranza, Managing Director & Head of CERAWeek

Roger Diwan, VP, Executive Director CERAWeek Content

Ken Downey, Executive Director, Innovation Agora

Amy Elam, Head, Partner Programs

Murray Fisher, Director, Strategic Development

Naki Mendoza, Director, Executive Conference Program

Martha O'Connor, Executive Director, Partnerships

Richard Slucher, VP, Executive Conference Program

Erika Smakula, Executive Director, Experience

Innovation Agora 2025 Highlights

Participants

4,400+

including 2,000+ Executive Conference participants*

987

Companies

49

Countries

510+

C-Suite Executives

34

Ministers & Top Officials from 12 countries

Sessions

429

Sessions

4

Voices of Innovation

20

Studios

92

Agora Hub Sessions

222

Agora Pods

38

Lyceum Labs

5

Book Signings

Community

870

Speakers

from 33 countries, 310 C-suite executives

66

Partners

47

Universities from 12 countries

275+

Startups

770+

Women

9

Agora Houses



Daniel Yergin, Vice Chairman, S&P Global

Innovation Agora 2025 Highlights (cont.)

The Innovation Agora fosters energy innovation and advances solutions to the world's greatest energy and sustainability challenges. This exciting community of startups, technologists, investors, academics, energy companies and government officials are all dedicated to shared learning and exploration.

The program features unique formats, interactive dialogue and conversations about global energy innovation and technology ecosystem.

Themes

Key themes and technology pathways featured across the Agora are rooted in innovation solutions:

- Al and Digital: Reshaping the future of production, management and consumption of energy.
- Power, Grid and Electrification: Policies, technologies and systems for a coming surge in demand.
- Hydrogen and Low-carbon Fuels: Moving from theory to execution.
- **Climate and Sustainability:** Policies and company strategies after COP29.
- **Technology and Innovation:** Driving performance and pace of transition.
- Managing Emissions: Innovating to deliver emissions reductions across energy and energy-intensive industries.
- The Capital Transition: The role of finance in the energy transition.
- Mobility and Transportation: Differentiated speeds towards a low-carbon system.

Formats

Our "multiverse" of highly interactive Agora formats include:

The Atrium

- Hubs Amphitheaters designed for conversations, dialogues and receptions.
 These include the Carbon, New Energies and Climate Hubs.
- Agora Pods Deep-dive presentations and case studies and startup "pitches" in a close-up, informal setting.
- stations to meet entrepreneurs building promising companies.
- Partner Installations Dedicated presence in the Agora Hubs featuring demonstrations of leading-edge solutions from Partner organizations.

Technology Corridor — Featuring startup

The Nexus

- Agora Studio Interactive discussions on emerging and disruptive technologies and models of innovation, including Voices of Innovation, where innovation pioneers and thought leaders share their journeys and insights.
- NextGen Amphitheater Dedicated zone for discussions oriented toward advancing a passionate, diverse workforce of the future and deepening industrial-academic collaboration.
- NextGen Pod Featuring early-stage research at universities, energy centers, and incubators during 25-minute Pod sessions.

Clean Energy Commons

- DOE room An opportunity to interact with the US Department of Energy.
- HETI room Activations by unique organizations supporting the energy innovation ecosystem.
- Innovators Row Showcasing early-stage research from universities and incubators using posters, whiteboards, and other media.

Agora Partner Houses

 Branded experiences and explorations by some of the world's leading energy and technology companies and organizations.

- NextGen Meetups Small, informal gatherings of communities that share a common interest.
- Nexus Library A comfortable meeting space showcasing over 30+ books that have been featured at CERAWeek over its 40 years. Five authors also signed personal copies of their books.
- Professional Headshots Conference participants enthusiastically partook of the opportunity to receive several free professional headshots taken onsite and electronically delivered the same day.
- **Learning Lyceum** High-impact learning through seminars, deep-dive discussions and presentations.
- Venture Day Early-stage pitch competition hosted by Houston Energy Transition Initiative (HETI).

Speaker Highlights



Energy at the Crossroads – Technologies, policies and business models: **Ernest Moniz**, Founder & CEO, EFI Foundation



Women Leaders Accelerating Cleantech and Sustainability: **Beth Evans** (Chair), Head of Technical Research, Upstream Solutions, S&P Global; **Cheryl D'Cruz-Young**, Senior Client Partner, Sustainability & Global Energy, Korn Ferry; **Sama Bilbao y Leon**, Director General, World Nuclear Association; **Karen Bomber**, Chief Commercial Officer, ABB Energy Industries, ABB Inc.; and **Lucia Tian**, Head of Clean Energy and Decarbonization Technologies, Google



Technological Advancements in Mining: Bruno Pelli, Global Director, Technical Services, Vale



Fuel Sources Competing to Meet Data Center Demand: Mohamed Al Braiki, General Manager, Consulting and ENEC Enterprise Strategy Vice President, Emirates Nuclear Energy Company (ENEC)



Al – Reducing emissions across energy value chain: **Hema Prapoo,** Worldwide Energy Sector Leader, Microsoft

Speaker Highlights (cont.)



Cybersecurity – Critical for grid security and stability: **Hanna Grene,** Senior Director, Global Energy & Resources Industry GTM, Microsoft



Financing the Future – Scaling clean energy through innovative investment strategies: **Jim Gable,** President of Chevron Technology Ventures & Vice President of Innovation. Chevron



Cybersecurity – Critical for grid security and stability: **Amogh Bhonde,** Vice President, Digital Solutions, Siemens Energy



Al in Energy – What is ahead?: Paul Kearns, Laboratory Director, Argonne National Laboratory



Financing the Future – Scaling clean energy through innovative investment strategies: **Hans Kobler,** Founder & Managing Partner, Energy Impact Partners



Digital 5.0- Improving operational performance: Rajamani Sambasivam, Chief Data Scientist, PETRONAS



Reducing Emissions from AI and Data Centers: **Cully Cavness**, Co-Founder, President & Chief Operating Officer, Crusoe



Financing the Future- Scaling clean energy through innovative investment strategies: **Georgina Campbell Flatter,** CEO, Greentown Labs

AI and Digital



Cybersecurity – Critical for grid security and stability: **Dan Thompson** (Chair), Principal Research Analyst, S&P Global Market Intelligence; **Hanna Grene**, Senior Director, Global Energy & Resources Industry GTM, Microsoft; **Amogh Bhonde**, Vice President, Digital Solutions, Siemens Energy; and **Qiang Huang**, Vice President of Product, Palo Alto Networks

- AI: Reducing emissions across energy value chain
- Al in Energy: Fast forward five years
- Al in Energy: What is ahead?
- Developing Workforce to Leverage AI
- Digital 5.0: Improving operational performance
- Harnessing Digital Twin Technologies in the Energy Sector
- S&P Global | Machine Learning 101: How to use Al to dissect well and production data



Al's Impact on Labor Markets and Employment: **Kelly Morgan** (Chair), Research Director, 451 Research – Datacenters, M&A, S&P Global Market Intelligence; **Dexin Luo**, Global Head of Artificial Intelligence, Linde; **Tasja Botha**, CEO, VAKT; **Mo Shawky**, Global Head of Business Development, Energy, Amazon Web Services; and **Paul Kearns**, Laboratory Director, Argonne National Laboratory



New Innovations in Automation Across the Energy Value Chain: **Scott McKay,** Senior Vice President, Division Manager, Americas, Energy Industries, ABB Inc

Power, Grid and Electrification



Nuclear Innovation – Advancements in SMRs and advanced reactors: Lucia Tian, Head of Clean Energy and Decarbonization Technologies, Google and Daniel Poneman, Former Deputy Secretary of Energy, Commission on Nuclear Energy and American Leadership, Co-Chair



Is Electrification of
Everything Technologically
Possible?: Melissa Busen,
Senior Vice President,
Electric Power,
Caterpillar



How Can Long-duration Energy Storage Contribute to Tripling Renewables?: Jon Norman, President, Hydrostor

- Breaking Down Solar Barriers: Battery co-location and hybrid solutions
- Flexible Solutions for Meeting Energy Demand
- Fuel Sources Competing to Meet Data Center Demand
- India's Energy Journey: The road ahead
- Innovative Technologies and Advancements
 Powering the Future of Wind Deployment
- Making Geothermal Happen: Success stories
- Materials and Hardware: Advancements in transmission technologies
- Next Gen Batteries: Charging up with advanced batteries
- Offshore Wind Power: Delivering on its promise for a sustainable future
- Texas-sized Ambitions: Becoming a hub for nuclear energy
- Tripling Nuclear Energy Capacity by 2050:
 Unleashing nuclear's potential to power data centers, refineries, manufacturing and beyond



Unlocking the Value of Nuclear Assets – Balancing intermittency and maximizing potential: Sama Bilbao y Leon, Director General, World Nuclear Association



Grid Reliability with Increasing Share of Renewables: Mateo Jaramillo, Co-Founder & CEO, Form Energy



How Can Long-duration Energy Storage Contribute to Tripling Renewables?: Charlotte Johnson, General Manager, InfraFlex. Kraken



Powering the Future of Data Centers: Arshad Mansoor, President & CEO, Electric Power Research Institute (EPRI)

Hydrogen and Low-carbon Fuels



A Blue Transition- Go low to no carbon with blue hydrogen: **Elena Scaltritti**, Chief Commercial Officer, Topsoe; **Jeffrey Benoit**, Vice President, Clean Energy Solutions, PSM - A Hanwha Company; and **Kai Guo**, Head of Market Development and Origination, Mitsubishi Heavy Industries Hydrogen Infrastructure



Asia Hydrogen Policy and Regulation – Challenges and success: Michele Azalbert, Chief Hydrogen Officer, Gentari Sdn Bhd and Fairy Wang, Vice President, Sinopec Economics & Development Research Institute (EDRI)



When Will SAF Take Off?: Corey Lavinsky (Chair), Consulting Director, S&P Global Commodity Insights; Konrad Jar, Executive Director for Strategy and Innovation, ORLEN S.A.; Stéphane Thion, Vice President, Commercial, LanzaJet; and Thomas René Bock, Sustainable Aviation Officer, European Union Aviation Safety Agency (EASA)

- Biorefined Products: Can the future scale fast enough?
- E-fuels and Synthetic Fuels: Hydrogen as a feedstock
- Ethanol Evolves in the Global Energy Mix
- European Hydrogen Policy: Scaling success and tackling challenges
- High-temperature Solutions: Decarbonizing heavy industry for the future
- Hydrogen Demand: Incentives, strategies and engagement
- Hydrogen on the Move: From pipelines to ammonia, scaling the energy carrier of tomorrow
- Hydrogen Storage: Unlocking power potential in the energy transition
- Industrial Low-carbon Hubs: Toward highimpact emissions reduction
- Keeping Hydrogen Costs in Check: Efficiencies, retrofits and electrolyzers
- Powering Fusion: Building a robust supply chain
- Topsoe | Unlocking the Potential of Low-carbon Hydrogen in Refining
- Turning Trash into Treasure: The future of waste-to-energy solutions
- Unlocking Innovations in Low-carbon Materials
- Unlocking the Hydrogen Value Chain:
 From production to market integration

Climate and Sustainability



Climate Cooperation in a Divided World: Paul McConnell (Chair), Head, Outlooks and Scenarios Analysis, S&P Global; Yukari Niwa Yamashita, Managing Director, Institute of Energy Economics, Japan (IEEJ); Joseph Majkut, Director, Energy Security and Climate Change Program, Center for Strategic and International Studies (CSIS); and William (Billy) Pizer, President & CEO, Resources for the Future (RFF)



Blue Carbon – Oceans as a key to climate mitigation: **Jess Adkins,** Smits Family Professor of Geochemistry & Global Environmental Science, California Institute of Technology and CEO, Calcarea; **Peter de Menocal,** President & Director, Woods Hole Oceanographic Institution; and **Mukul Sharma,** Professor, Dartmouth College

- Are COPs Still Relevant?
- Article 6 Outcomes at COP29 and the Future of Carbon Markets
- Beyond Degrees: A call for rethinking climate metrics
- Bill McDonough | All Sustainability Is Local
- Book Talk: Steven E. Koonin, Senior Fellow, Stanford University's Hoover Institution | Unsettled (Updated and Expanded Edition): What climate science tells us, what it doesn't, and why it matters
- CBAM in Focus: Balancing trade, competitiveness and emission reduction
- China: Approaching peak emissions for global climate action
- Data Wall Session | Impacts of Physical Climate Risk to Scaling Clean Energy

- Demand-side Measures: Empowering consumers through incentives and innovation
- Extreme Weather: Signals of a changing climate
- Green Growth: An oxymoron?
- Investing in Nature: Quality, credibility and impact of carbon offsets
- Is Climate Change Influencing Asset Prices and Insurance Premiums?
- Offsets at Scale: How big can their role be in climate action?
- Policy and People: Pathways to a just transition
- S&P Global | The True Cost of Water: Emissions, economics and the path forward
- Solar's Power Play: How clean energy is shaping America
- State of Clean Energy Innovation: Going fast, going slow?

- Transition in Action: Energy giants shaping a sustainable future
- US Climate Policy Pathways and the Implications for Industry
- WHOI | Monitoring Our Oceans: Working at the frontier of global ocean real-time sensing using mass autonomy

Technology and Innovation



Bridging the Gap – Global North-South partnership on technology: Ashutosh Singh (Chair), Head of Energy Transition Program Management, S&P Global; Aura Cuellar, President, LanzaTech; Izwan Ismail, Vice President of Group Technology & Commercialization, Petroliam Nasional Berhad (PETRONAS); Mark Menezes, President & CEO, United States Energy Association



Unlocking Potential – Non-traditional paths to commercialization: Hill Vaden (Chair), Executive Director, S&P Global and Leila Madrone, Executive-in-Residence, Activate



Women Leaders Accelerating Cleantech and Sustainability: **Beth Evans** (Chair), Head of Technical Research, Upstream Solutions, S&P Global; **Cheryl D'Cruz-Young**, Senior Client Partner, Sustainability & Global Energy, Korn Ferry; **Karen Bomber**, Chief Commercial Officer, ABB Energy Industries, ABB Inc.; **Sama Bilbao y Leon**, Director General, World Nuclear Association; and **Lucia Tian**, Head of Clean Energy and Decarbonization Technologies, Google

- 4th Annual Houston Energy Venture Day and Pitch Competition
- Book Talk: Douglas Arent | Our Renewable Energy Future: The remarkable story of how renewable energy will become the basis for our lives
- Bridging the Skills Gap: Are universities preparing students for their careers?
- Cemvita | The Future of Bioengineered Feedstocks:
 A foresight perspective
- Chevron | From Innovation to Scale
- Collaboration Spotlight: National labs, universities and non-profits driving entrepreneurial success
- Collaboration Spotlight: The Carbon Hub:
 A public-private partnership leading the way to a sustainable carbon economy
- Collaboration Spotlight: The need and benefits of industrial-academic collaborations
- Emerging Technologies for Reducing Emissions
- Energy Innovation Pioneers: Transforming the energy sector through digital technologies
- Innovation Cold War: US and China's race in clean tech and Al
- Innovating with Purpose: Strengthening industrialacademic partnerships
- Microsoft | Breaking the Gridlock and Fasttracking Innovation at National Grid
- NextGen Conversations: Bill McDonough
- NextGen Conversations: Scott Tinker
- Stanford | Solving 21st-century Energy Demand Challenges: A public-industry-education (PIE) approach
- Technologies for Reducing Emissions in Oil & Gas Operations
- The Next Decade of Surging Demand— Will the US Have the Power to Match?
- University Innovations: The next wave of AI
- Voices of Innovation: John Browne
- Voices of Innovation: Rebecca Kujawa
- Voices of Innovation: Sunita Narain
- Which Technologies Are Ready for Gigaton Scale?

Managing Emissions



Cities' Blueprints for a Net-zero Future: **Hon. Jyoti Gondek,** Mayor, City of Calgary, Canada and **Jesper Frost Rasmussen,** Mayor, Esbjerg Municipality, Denmark



Is CCS Pivoting to Scale? Which industries and regions can drive it?: Chris Powers, Vice President, CCUS and Emerging, Chevron and Laurie Fitzmaurice, President, Elimini

- Can Asia Stimulate Global CCS Growth?
- CBAM: Extending emissions management beyond borders?
- CCS Projects: Case studies and lessons learned
- Coming Free: Solutions to un-stick CCS FIDs
- DAC Scale-ability: To gigaton, or niche?
- Emissions Reduction Approaches in Concrete and Construction
- How to Align Methane Management and International Regulations
- How to Completely Extinguish Flaring in Oil & Gas Operations?
- Leading Sustainability Practices in Electricity Grid Operations
- Learnings from Permian Methane Reduction
- Northern Lights CCS: Learnings from delivery, and future prospects
- Reducing Emissions from AI and Data Centers
- S&P Global | Creating Credible Methane Benchmarks
- Seeking Net Zero in Energy-intensive Industries

The Capital Transition



Addressing Barriers to Bankability of Clean Energy Projects: **Ernest Moniz** (Chair), Founder & CEO, EFI Foundation; **H.E. Majid Al Suwaidi**, CEO, Alterra; and **Marisa Buchanan**, Senior Vice President, Strategic Corporates & Partnerships - Gas & Low Carbon Energy, bp



Creating Value with Corporate Venture Capital in low-carbon businesses: Paul Markwell (Chair), Senior Associate, CERAWeek, S&P Global; Barbara Burger, Director & Advisor, Independent; Steve Smith, Chief Strategy & Regulation Officer, National Grid; Daniel Carter, Managing Director, Aramco Ventures

- Business Strategies: Adapting to transform performance through the transition
- Cost of Energy Transition vs. Cost of Inaction
- Energy Pathways: Exploring the future of global energy corridors
- Financing the Future: Scaling clean energy through innovative investment strategies
- Global Stakes: US-China dynamics in the energy transition
- How to Drive Capital into the Energy Transition
- Navigating Fusion to FID: A strategic timeline
- Primary Energy Fallacy
- S&P Global | Navigating the Energy Transition: Changing spending patterns and their impact
- The Capital Transition: Balancing risks and rewards across the clean energy value chain
- The Green Gold Rush: A multitrillion dollar opportunity?

Mobility and Transportation



Flying to Sustainability – Innovations in aviation to reduce emissions: **Daniel Evans** (Chair), Vice President, S&P Global; **Susan Gray,** Head of Energy Transition and Sustainability, Argo Infrastructure Partners LLC; **Atsuhiko Hirano**, Representative Director, Executive Vice President, Idemitsu Kosan Co.,Ltd.; and **Thomas René Bock**, Sustainable Aviation Officer, European Union Aviation Safety Agency (EASA)

- EV Adoption: Crossing 50% threshold in North America
- Future Cities on the Move: Innovative pathways for sustainable urban mobility
- Life-cycle Emissions of EVs versus ICE
- Race to Decarbonize Mobility: Will hydrogen, batteries or biofuels win?



Global Shipping – Can carbon pricing accelerate the route to net zero?: **Hedi Grati** (Chair), Executive Director, Petrochemical Feedstocks, S&P Global; **Christopher Wiernicki**, Chairman & CEO, American Bureau of Shipping (ABS); **Hisashi Umemura**, Senior Managing Executive Officer, Mitsui O.S.K. Lines, Ltd.; and **Rik Sneep**, SVP Strategy & International Growth, Moeve

New Energies Hub | A focus on the clean energy economy

The Innovation Agora New Energies Hub is a dedicated space focused on the clean energy landscape.

Participants explored innovative solutions and strategies shaping the clean energy landscape, with discussions that spanned hydrogen, biofuels, nuclear energy, renewables and energy storage. These conversations addressed the challenges, advancements and policies required to scale technologies and achieve global energy transition goals.



Texas-sized Ambitions – Becoming a hub for nuclear energy: **Jeff Miller,** Vice President of Business Development, TerraPower; **Dan Eggers,** Executive Vice President & Chief Financial Officer, Constellation; **Jimmy Glotfelty,** Commissioner, Public Utility Commission of Texas; **Dale Klein,** Professor, Walker Department of Mechanical Engineering (Nuclear Program), University of Texas at Austin; and **Michael Pickens** (Chair), Principal Research Analyst, S&P Global



The Capital Transition – Balancing risks and rewards across the clean energy value chain: Laurent Ruseckas (Chair), Executive Director, First Take Gas & Global Macro, S&P Global; Amy Ridge, Partner, Mercer Alternatives, Mercer; Jeff Currie, Chief Strategy Officer of Energy Pathways, Carlyle; and Steve Smith, Chief Strategy & Regulation Officer, National Grid



Making Geothermal Happen – Success stories: **Tim Latimer,** Co-Founder & CEO, Fervo Energy

New Energies Hub | A focus on the clean energy economy (cont.)



High-temperature Solutions – Decarbonizing heavy industry for the future: **Kreshka Young,** North America Business Director, Energy & Climate, Dow



Meeting the World's Lithium Needs: Innovations for a sustainable future: Allison Thurmond, Vice President of US Lithium, Equinor; Jeff Alvarez, President & General Manager, 1PointFive Sequestration and TerraLithium; Nicholas Lugansky, Head of Mining, SLB



Addressing Barriers to Bankability of Clean Energy Projects: **Ernest Moniz** (Chair), Founder & CEO, EFI Foundation; **H.E. Majid Al Suwaidi**, CEO, Alterra; and **Marisa Buchanan**, Senior Vice President, Strategic Corporates & Partnerships - Gas & Low Carbon Energy, bp

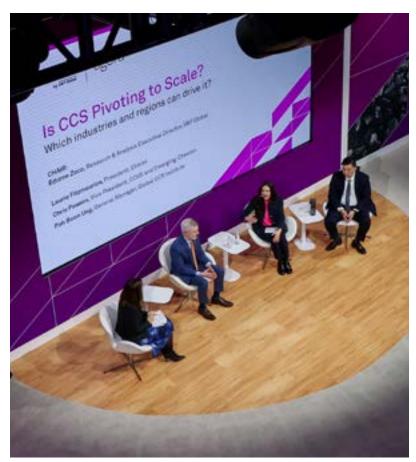


Innovative Technologies and Advancements Powering the Future of Wind Deployment: **Sean Kelly,** Co-Founder & CEO, Amperon; and **Mark Lundstrom,** Founder & CEO, Radia

Carbon Hub | A focus on the decarbonization ecosystem

The Innovation Agora Carbon Hub is a dedicated space in which energy industry stakeholders convene to exchange insights on innovations which avoid or abate GHG emissions in pursuit of net-zero goals.

Leading experts from across the energy and energy-intensive industries and innovation ecosystem shared ideas, experiences, and learnings on how to implement and scale solutions which reduce GHG emissions or remove CO2 from the atmosphere using technology, new business models and the enablers available from financing, policy and market support.



Is CCS Pivoting to Scale? Which industries and regions can drive it?: Edurne Zoco (Chair), Research & Analysis Executive Director, S&P Global; Chris Powers, Vice President, CCUS and Emerging Tech Units, Chevron; Laurie Fitzmaurice, President, Elimini; and Poh Boon Ung, General Manager, Global CCS Institute



AI – Reducing emissions across energy value chain: Etienne Gabel (Chair), Research & Analysis Director, S&P Global; Gino Hernandez, Head of Global Digital Business, ABB Inc.; Hema Prapoo, Worldwide Energy Sector Leader, Microsoft; and David Sandalow, Inaugural Fellow, Center on Global Energy Policy, Columbia University

Carbon Hub | A focus on the decarbonization ecosystem (cont.)



Critical Minerals Role in a Low-carbon Future: Natznet Tesfay (Chair), Vice President, Insights and Analysis, S&P Global Market Intelligence; Gracelin Baskaran, Director, Critical Minerals Security Program, Center for Strategic and International Studies (CSIS); and Emily Olson, Chief Sustainability & Corporate Affairs Officer, Vale Base Metals



Critical Minerals Role in a Low-carbon Future: Emily Olson, Chief Sustainability & Corporate Affairs Officer, Vale Base Metals and Masatoshi Nishi, Vice President – Venture & Business Development, INPEX USA



DAC Scale-ability – To gigaton, or niche?: Paola Perez Pena (Chair), Principal Research Analyst, S&P Global; Robert Zeller, Vice President - Technology, Occidental; David Victor, Professor of Innovation and Public Policy, School of Global Policy and Strategy, University of California, San Diego (UCSD); and Brian Marrs, Senior Director, Energy Markets, Microsoft



Unlocking Innovations in Low-carbon Materials:

Nada Qari, Lead Lab Scientist, R&D Nonmetallic
Applications, Aramco; Bernie Bulkin, Chair, Global
Energy Infrastructure Plc; and Edward Stones,
Business Vice President, Energy and Climate, Dow

Climate Hub | A focus on solutions for climate change

The Innovation Agora Climate Hub is a dedicated zone for sharing ideas and exploring solutions for climate change.

Through open amphitheater panel sessions and smaller group meetups, leaders in energy industry, finance, government and academia explored key topics surrounding climate change and engaged in discussions on science and modeling, technology and innovation, stakeholder engagement, adaptation, the geopolitics of climate change and carbon markets.



Which Technologies Are Ready for Gigaton Scale?: Ashutosh Singh (Chair), Head of Energy Transition Program Management, S&P Global; Irlan Amir, Vice President, Renewables and Energy Efficiency, SLB; Ramamoorthy Ramesh, Vice President for Research, Rice University; and Ricky Sakai, Senior Vice President, Investment & Business Development, Mitsubishi Heavy Industries America



Policy and People – Pathways to a just transition: Vera Blei (Chair), Head of Market Reporting & Trading Solutions, S&P Global; Sunita Narain, Director General, Centre for Science and Environment (CSE); Olu Verheijen, Special Advisor on Energy to President Bola Ahmed Tinubu, Office of the President of the Federal Republic of Nigeria; and Scott Tinker, CEO, Tinker Energy Associates; Director Emiratis, Bureau of Economic Geology; and Chairman, Switch Energy Alliance

Climate Hub | A focus on solutions for climate change (cont.)



The Green Gold Rush – A multi-trillion-dollar opportunity?: **Bobby Tudor,** CEO, Artemis Energy Partners and Chairman, Houston Energy Transition Initiative



Innovation Cold War – US and China's race in clean tech and Al: Jane Nakano, Senior Fellow, Energy Security and Climate Change Program, Center for Strategic and International Studies (CSIS); Lei Yang, Vice Dean, Peking University; and David Sandalow, Inaugural Fellow, Center on Global Energy Policy, Columbia University



Beyond Degrees – A call for rethinking climate metrics: Atul Arya (Chair), Senior Vice President & Chief Energy Strategist, S&P Global Commodity Insights; Sasha Mackler, Senior Vice President, Global Head of Strategic Policy, ExxonMobil; Sergey Paltsev, Senior Research Scientist, MIT Energy Initiative & Deputy Director of the MIT Center for Sustainability Science and Strategy, MIT Energy Initiative; and David Victor, Professor of Innovation and Public Policy, School of Global Policy and Strategy, University of California, San Diego (UCSD);

Voices of Innovation

Up-close conversations with foremost innovators and thought leaders



Atul Arya (Chair), Senior Vice President & Chief Energy Strategist, S&P Global and **Lord John Browne,** Chairman and Co-Founder of BeyondNetZero, BeyondNetZero, General Atlantic



Rebecca Kujawa, President & CEO, NextEra Energy Resources



Scott Sheffield, Founder, Pioneer Natural Resources



Sunita Narain, Director General, Centre for Science and Environment (CSE)

Book Talks and Signings

An opportunity to meet & receive a personally autographed book by a leading energy authority

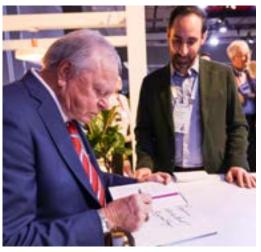
Five authors participated in the Agora's Book Talks and signed personal copies of their books in the Nexus Library.



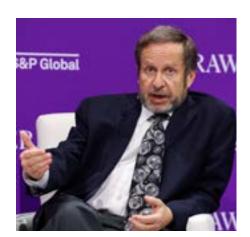
Douglas Arent, Executive Director, NREL Foundation, Emeritus NREL and Global Fellow, Center for Global Energy Policy, Columbia University | *Our Renewable Energy Future: The Remarkable Story of How Renewable Energy Will Become the Basis for Our Lives* interviewed by **Yann Le Pallec,** President, S&P Global Ratings, S&P Global



Bernie J. Bulkin, Chair, Global Energy Infrastructure Plc | *The Material Advantage*



Harold Hamm, Executive Chairman, Continental Resources | Game Changer: Our 50-Year Mission to Secure American's Energy Independence



Steven E. Koonin, Senior Fellow, Stanford University's Hoover Institution | *Unsettled* (*Updated and Expanded Edition*): What climate science tells us, what it doesn't, and why it matters



Daniel Yergin, Vice Chairman, S&P Global | *The Prize: The epic quest for oil, money & power* interviewed by **Dave Ernsberger,** Co-President, S&P Global Commodity Insights

The Nexus



Activity in The Nexus



Innovation Agora Studio | Energy at the Crossroads – Technologies, policies and business models: Atul Arya (Chair), Senior Vice President & Chief Energy Strategist, S&P Global Commodity Insights; Anna Mascolo, Executive Vice President Low Carbon Solutions, Shell International Petroleum Limited; Emmanouil Kakaras, Executive Vice President, GX Solutions, Mitsubishi Heavy Industries EMEA, Ltd.; and Ernest Moniz, Founder & CEO, EFI Foundation



NextGen Amphitheater | Developing Workforce to Leverage Al: Annette Hugh (Chair), Global Head of Market Development & Engagement, S&P Global Commodity Insights; Kara Ruskin, Senior Client Partner, Technology, Korn Ferry; Mai Lan Nguyen, Senior Vice President, Human Resources, Schneider Electric; Jessica Van Singel, Managing Director – Global Resources Industry Talent & Organization Lead, Accenture

The Nexus (cont.)



Women in Energy Huddle



The Nexus Library | Book Signing with **Daniel Yergin** for his Pulitzer Prize-winning book *The Prize: The Epic Quest for Oil, Money & Power*



Professional Headshots



NextGen Pod | Space Solar – Powering Our Future Wirelessly from Space: **Sam Adlen,** Co-CEO, Space Solar

Agora Pods



ADNOC | Introducing Neuron 5: Shamsa Al Dhaheri, Process Safety Specialist, ADNOC and Dr. Mariam Al Hendi, A/VP Operations Excellence, Thamama Excellence Center, ADNOC

- 360 Energy | Reimaging Natural Gas Offtake with Infield Computing
- ABB | De-risking CCS Network Operations with Digital Twin Technology
- ABB | Uncovering Material OT Cyber Risk: Useful models for long-term asset risk management
- Accenture | Agentic AI:
 Transforming the Energy Industry with Autonomous Intelligence
- Addis Energy | Advanced
 Chemistry to Enable the Earth as a Chemical Reactor
- ADNOC | Introducing Neuron 5
- Advanced Ionics | Finally,
 Green Hydrogen Without the
 Green Premium

- Aether Fuels | Enabling Scalable, Sustainable Fuels for Aviation and Ocean Shipping
- Again Bio | Clean and Resilient Industrial Supply Chains Built on Next-generation Bio-CCU Technology
- AiDASH + National Grid | Transforming Vegetation Management with AI
- AIQ | Scaling Value from AI Across the Value Chain
- Air Products | Blending
 Hydrogen and Natural Gas in a
 Traditional Boiler
- Air Products | The Role of Membranes in Efficient Hydrogen Use
- AirHive | Delivering Low-cost DAC Today

- Airloom Energy | The Next Era of Wind Power: Making wind energy cheaper, scalable and ubiquitous
- Altave | Transforming Critical
 Operations with AI-powered Video
 Analytics Solutions
- Ammobia | The Most Economical Ammonia Production Technology
- Amperon | The Energy Transition Paradox: Volatility, demand and the power of forecasting
- Amplified Industries | Cutting Through AI Noise to Create Value in Energy
- Andium | Continuous Industrial Monitoring: Lowering costs through automation and edge AI

- Arculus Solutions | Retrofitting Natural Gas Transmission
 Pipelines to Safely Transport CO₂ or Hydrogen
- Ardent | Ready for Reality: Roadmap for practical carbon capture
- Arolytics | Harnessing Measurement Data for Strategic Emission Abatement and Forecasting
- Avangrid + AWS | Enhancing Field Operations Safety and Efficiency with Generative AI
- AWS | Transforming Energy with Generative AI on AWS
- Ayrton Energy | Connecting the Hydrogen Ecosystem: Electrically enabled LOHC for efficient transport and storage

- B4E Carbon | Next-Gen Trusted Carbon Tracking, Reporting and Monetization
- B4E Logistics | The Future Is Now in Transforming Your Operations
- Baker Hughes | Mature Assets: Innovative strategies to maximize field life and support cleaner energy
- Baker Hughes | The Future of Power Generation: Innovative solutions to drive clean, reliable power at scale
- Base Power Company | Scaling Distributed Energy Storage
- Blue Energy | Reducing the Cost, Risk and Timeline for New Nuclear Power
- Blue Mountain Operations |
 From Cost Pain to Capital Gain: A
 case study on turning emissions
 into earnings
- Blue Planet Systems | Synthetic Aggregate: A permanent solution for CO₂ storage
- BlueShift | Economic Resilience by Unlocking Underutilized Resources with Advanced Technology
- Capsol Technologies | Capturing CO₂ While Generating Extra Heat/ Electricity
- Carbon Negative Solutions | The New Currency: Industrial waste
- Carbon Recycling International |
 Pioneering the Future of
 Renewable Fuels: A scalable
 solution for the market
- Carbon Upcycling | Transforming CO₂ into Critical Building Materials through Carbon Mineralization

- CarbonQuest | The Power of Distributed Carbon Capture
- Charm Industrial
- Cheesecake Energy | Resilience Through Storage: How LDES can help C&I customers
- Citrine | You Can't Use Chat GPT for Everything: Lessons from a decade of experience in Al for chemicals
- Cognittiv | The Human Factor: Unlocking the next wave of safety innovation
- Commonwealth Fusion Systems
- Corrolytics | Digitizing and Revolutionizing Corrosion
 Detection and Monitoring for Industrial Assets
- Corva.AI | Connecting the Dots: Energy, clarity and AI
- Crusoe | An Energy-first Approach to Al Data Centers
- Deep Seed Solutions | Maximizing Value in Offshore Capital Projects: Smarter investments, greater returns
- DexMat | We Need More Conductive Materials: Why advanced carbon is the key
- DG Matrix | Alleviating Power Constraints in Electrification and AI Datacenters with Distributed Energy
- Dioxycle | Electrolysis-powered
 Ethylene Chemistry
- Echogen Power Systems |
 Stabilizing the Grid with Pumped
 Thermal Energy Storage (PTES)



ABB | De-risking CCS Network Operations with Digital Twin Technology: **Nigel Greatorex**, Global Industry Business Manager, CCS, AB



Ternium | Steel for the Future of Mobility: **José Fonrouge,** Global Sustainability Senior Director. Ternium

- Electrified Thermal Solutions |
 All-electric Industry: Joule Hive™
 as a drop-in replacement to
 fossil fuels in industrial boilers,
 furnaces and kilns
- Elemental Advanced Materials
- Elementium Materials | Nextgeneration Electrolytes: Supercharging batteries for an electrified world
- Elementl | Catalyzing a Nuclear Renaissance: Elementl Power's groundbreaking approach to new nuclear deployment
- Emvolon | Carbon Negative Fuels Today
- Enchanted Rock | Flex or Famine:
 The power to accelerate AI
- Enovate.Al | Al-driven Advantage:
 Automate. Optimize. Decarbonize.

- Equilibrium Energy | Modernizing Machine Control: Unlocking our full critical potential
- Evoloh | High-throughput
 Manufacturing of Low-cost
 Electrolyzer Stacks
- Exodigo + National Grid | Mapping the Underground with AI
- Exxon Mobil + AWS | Transforming Spatial Computing for Global 3D Data Management and Collaboration
- ExxonMobil | Applying Technology to Maximize Value in the Permian Basin
- ExxonMobil | Real-world Progress on Building a Low-carbon Business
- Fervo Energy | Speed and Scale:
 The geothermal decade is now
- Fleet Robotics | Shaping the Future of Proactive Asset Management

- Found Energy | Aluminum Fuel:
 The future of clean industrial heat
- Fu2re | Unleash AI and Computer
 Vision to Improve Your Productivity
- FUEL | Expanding Louisiana Energy Exceptionalism
- FuelCell Energy | FuelCell Energy's Low-carbon Power and Hydrogen Solutions
- Fulcrum Air | Revolutionizing the Grid: How aerial robotics are bridging the labor gap in power line construction and maintenance
- GAF Energy | Building the Future of Energy: The true impact of distributed energy and consumer technology
- Gecko Robotics | Transforming Capital Planning in Energy
- General Galactic | Solving the Energy Density Gap with Synthetic Fuels

- Geolabe | Global High-frequency Detection of Methane Super-emitters
- GHGSat | Demystifying Methane Mitigation: How satellites pinpoint methane leaks at speed and scale
- GLR Tech | Driving Industrial Decarbonization
- GNO and NewLab | Scaling Innovation for Reindustrialization: Louisiana's place-based approach to critical tech commercialization
- Google Cloud | AI for Weather and Climate Modeling
- Gov't of Alberta | Alberta's
 Leadership in Technology-driven
 Energy Development
- GridAstra | Software-based Intelligence to Unlock the Grid for Cost-effective Interconnection of Renewables and Data Centers



Mars Materials | Decarbonizing Enhanced Oil Recovery with Carbon Negative Acrylonitrile: **Aaron Fitzgerald,** Co-Founder & CEO, Mars Materials



Ayrton Energy | Connecting the Hydrogen Ecosystem- Electrically enabled LOHC for efficient transport and storage: **Natasha Kostenuk**, Founder & CEO, Ayrton Energy



Microsoft | Harnessing Al for Energy Sector Leadership: Nada Al Meqbali, Vice President, Future Foresight & Creative Lab, Abu Dhabi National Oil Company and Hema Prapoo, Worldwide Energy Sector Leader, Microsoft

- Heliogen | Achieving Energy Resilience Through Concentrated Solar Plus Thermal Energy Storage
- Helios AI | Next-gen Energy Forecasting: Empowering a new era with climate-driven insights?
- Hertha Metals | Forging the Future of Steel
- HIF Global | The Green Blueprint:
 Site selection strategies for green hydrogen and eFuel production
- Highwood Emissions | Solving Measurement-informed Methane Inventory Complexity with Automation and Rigor
- Hunt Energy + AWS | Transforming Distributed Battery Management with AWS IoT and SCADA Solutions
- Husk Power Systems | Meet the World's Largest Rural Utility

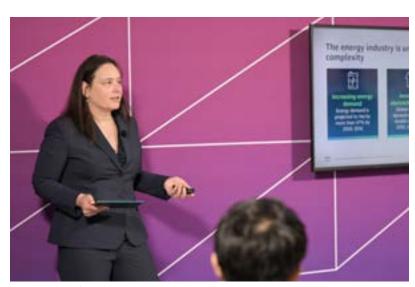
- Hydrostor | Unlocking Energy Security: Why the grid needs longduration energy storage
- INERATEC | Modular Power-to-X Plants for Commercial-scale e-Fuel Production
- Infinium | Fueling the Future:
 Scaling eSAF production
- Inlyte Energy | The Iron-sodium Battery: A unique 2-in-1 solution for utilities, data centers and C&I
- Innovation: Africa | Solar Energy to Pump Water: CSR opportunity
- Innovator Energy | Breakthrough Technologies Powering Resilient Data Centers
- International Battery Metals |
 Proven Way to Unlock Commercialscale Lithium Supplies
- JOGMEC | Capacity into Action: Methane emission management efforts

- Kairos Power | Breaking the Nuclear Cost Barrier: Kairos Power's blueprint for advanced reactor delivery
- Kanin Energy | Unlocking Waste Heat to Power
- Kore | Carbon-negative Power from Waste
- Kraken | 5 Key BESS Market Trends:
 The need, value and challenges
- Linde | Vent vs. Capture: The race to the bottom
- Linde | World's Largest CO₂ Capture Pilot Plant – Decarbonizing Power Generation
- LineVision | Unlocking Grid
 Capacity to Keep Pace with
 Surging Load Growth
- LiNova Energy | High-energy Battery Materials: LiNova's madein-America solution

- Luminous | Toward Scaling Energy Infrastructure at Superhuman Rate: Robotics and automation
- M2X Energy | Crossing the Valleys of Death: Lessons from scaling hard tech
- Mars Materials | Decarbonizing Enhanced Oil Recovery with Carbon Negative Acrylonitrile
- Marsh McLennan | Enabling Resiliency in Energy Supply Chains with Sentrisk™
- Mattiq | Can Electrochemical Innovation Boost Returns in the Chemical Industry?
- MethaneSAT | A Unique Player in the Satellite Ecosystem
- MetOx | Superconducting the Grid: How HTS meets soaring energy demand
- Microsoft | Breaking the Gridlock and Fast-tracking Innovation at National Grid
- Microsoft | Harnessing Al for Energy Sector Leadership
- Mitsubishi Power | Optimizing Data Center Power Strategies
- Moeve + AWS | Powering a Cleaner Energy Future with AWS
- Momentum Technologies |
 Fortifying Critical Metals Supply
 Across Multiple Markets
- Mura Technology | Hydro-PRT®: Leading the way in advanced recycling
- National Grid | National Grid's Innovation Journey
- NEI | Aligning Offtakers and Nuclear Development
- Nesh | Generative AI to Turbocharge Revenue in Manufacturing



Exxon Mobil + AWS | Transforming Spatial Computing for Global 3D Data Management and Collaboration: **Michael Hotaling,** Operations Excellence Digital Manager, ExxonMobil



Moeve + AWS | Powering a Cleaner Energy Future with AWS: Alaina Bookstein, Global Head of Strategic Partnerships, Energy & Utilities, Amazon Web Services

- Noon Energy | 24/7/365 Clean, Reliable Electricity with Ultra-long Duration Energy Storage
- Nu:ionic | Teal Hydrogen:
 Transforming the low-carbon
 hydrogen and energy landscape
- Oceanbit | Building AI: Combined power and cooling ocean thermal data centers
- OCP | Fertilizing the Future: How phosphates drive low-carbon agriculture
- Orbio Earth | Methane Detection with Satellites and Al
- Othersphere | Search Engine for Sustainable Infrastructure
- OxCCU | From CO₂ to Jet Fuel: Developing the world's lowestcost power-to-liquids pathway
- Oxford Flow | Zero-emissions Valve Technology
- Oxylus Energy
- Paces | Meeting Data Center
 Demand with Renewable
 Development Automation
- Pattern Energy | We Need to Think Bigger (and Faster) on Transmission
- Percepto | Eye in the sky:
 Autonomous oil field inspection with drones and AI
- Planted Solar | Solar Unleashed:
 Less land, a few robots, a lot
 more power
- PolyJoule | Turning Polymers into Power: Plastic batteries built for the grid
- Prodigy Clean Energy | Transportable Nuclear Power Plants: Rapidly deployed firm power solutions

- Puloli | Next-Generation
 Continuous Methane Monitoring:
 Redefining what's possible
- Pure Lithium | Introducing the Lithium Metal Vanadium Battery and Reinventing the Global Supply Chain
- Queens Carbon | The Future of Cementitious Material Production
- Radia | Aerial Transport for Larger
 Onshore Wind Turbines: The
 pathway to lowest cost clean power
- Radiant Nuclear | Power the Future with Portable Microreactors
- ReSource Chemical | Harnessing CO₂ for Breakthrough Materials
- RheEnergise | Solving 24/7
 Renewable Power for Data
 Centers with High-Density Hydro®
- Sage Geosystems | Geothermal at the Speed of Need: How Sage Geosystems is meeting growing energy demand
- Schneider Electric | The Critical Role of Digital & Automation for a Competitive Power-to-X (Hydrogen) Sector
- SEIA | Powering America's Future:
 Unleashing solar to meet grid
 demand and electrification
- Sensat + National Grid | Unlocking Program Delivery
- SensorUp | Solving the Data Problem: Connecting systems, teams and analytics to reduce emissions
- Sesame Sustainability | Decisionmaking with Confidence
- Siemens Energy | Direct Air Carbon Capture

- SLB | Democratizing AI in Energy Operations
- Solidec | Low-cost, Low-carbon Chemicals from Air
- Sparkfund | Delivering Grid Value at Scale: Distributed capacity procurement
- Spiritus | Unleashing a "Golden Era" for Carbon Removal to Power America's Explosive Al and Infrastructure Growth
- Square Robot | Bridging the Divide: How Square Robot's tank inspections align corporate strategy with on-the-ground reality
- Syzygy Plasmonics | Deploying the World's Most Economic Biogas to SAF Technology
- Ternium | Steel for the Future of Mobility

- TerraFixing | Gigatonne-scale
 Capture with the World's First Coldclimate Zeolite-based DAC Tech
- Terragia
- Terrestial Energy | How Advanced Nuclear Can Provide Reliable, Affordable Power for Data Centers and Industry
- Thea Energy | AI, Dynamic Software Controls and Mass-manufacturable Magnet Array Hardware to Advance a Scalable Form of Fusion Energy
- Thiozen | Oil & Gas Waste to Lowcost Hydrogen
- Tidewise | Enabling Remote Work at Sea with Uncrewed Technology
- Tokamak Energy | Energy Abundance Through Fusion and Superconducting Technology

- Transaera | Novel Materials
 Will Fundamentally Change Air
 Conditioning
- TrelliSense | Methane Monitoring: You Cut, We Measure
- TS Conductor & National Grid | Modernizing the World's Power Grids
- Tulum Energy | Techenergy Ventures' Turquoise Hydrogen Venture Build
- Turnover Labs | Leveraging Durable Electrochemistry to Convert Low-grade Emissions into Highvalue Chemicals
- Twelve | Building a Nextgeneration Hydrocarbon Business
- Type One Energy | De-risking Fusion Commercialization: The power of partnerships

- Universal Matter | Leveraging Carbon to Decarbonize: Redefining industry standards
- Urbint | Leading the Future of Operational Risk Mitigation with Al
- Utility | Clean, Economic, Scalable Hydrogen Integrated in Existing Industrial Assets
- Vast | Making Jet Fuel with Sunlight: Building a competitive green fuel economy with concentrated solar power
- VEIR | Why AI Data Centers Need Superconducting Power Solutions
- Venterra | Building an Offshore Wind Services Champion
- Vertical Horizons | Next-generation
 Vertical GaN Power Transistors
- Via Separations | Deploying Efficient Filtration Systems to Replace Industrial Heat at Commercial Scale
- VIE Technologies | Advancing Grid Resilience: Al-driven sensing for smarter infrastructure
- Voltpile | Next-generation Solid-State Batteries
- WATT Fuel Cell | Redefining the Future of Residential and Remote Energy Systems
- Zanskar | Using AI to Unlock Geothermal's Massive Untapped Potential
- Zeta Energy | The Rise of Lithium-Sulfur Batteries: A solution to critical metal constraints



Commonwealth Fusion Systems: Bob Mumgaard, Co-Founder & CEO, Commonwealth Fusion Systems

Lyceum Labs



Elimini | A New Era of Renewable Energy – Bioenergy with carbon capture and storage: Laura Wente, Senior Vice President Commercial, Elimini



Marsh McLennan | Strengthening Supply Chain Resilience in the Energy Industry: **Amy Barnes**, Managing Director, Marsh McLennan and **Matt Sayde**, Sentrisk Sales Leader, US & Canada, Marsh McLennan



Topsoe | Unlocking the Potential of Low-carbon Hydrogen in Refining: Adam Kadhim, Product Line Director, Topsoe and Mikala Grubb, Senior Vice President, Topsoe A/S

- Activate | A Deeper Look: Accelerating lab-to-market innovation
- Activate | How Money Talks in Today's Startup World
- Activate | How to Activate the Whole Ecosystem of Innovation
- Argonne National Laboratory |
 Addressing the R&D Needs of the
 Critical Materials Supply Chain
- ARPA-E: The High-risk High-impact Energy Future
- Bill McDonough | All Sustainability
 Is Local
- Catavento | Rethinking the Transitioning from Oil and Gas in a Just, Orderly and Equitable Manner
- Cemvita | The Future of Bioengineered Feedstocks: A foresight perspective
- Chevron | From Innovation to Scale

- Chevron | Partnering for the Future: Chevron and Microsoft advance edge-to-cloud technologies
- Compressed Gas Association |
 Fueling a Safe Hydrogen Future:
 Standards, innovation and
 leadership
- Context Labs | Beyond Compliance: Turning carbon management into a competitive advantage
- Dartmouth College | Developing Green Energy Infrastructure in Conflict Regions of Africa
- Dartmouth College | The Impact of Federal Policies on American Manufacturing and Workers
- EPE | Net-zero Scenarios for Brazil and Implications for COP30
- Gecko Robotics | Optimizing Sustaining Capital with AI and Robotics

Lyceum Labs (cont.)



MHI | Gas Turbines and Carbon Capture – Innovative solutions to meet market demand: **Mike Fowler,** Vice President, Engineered Systems Division, Mitsubishi Heavy Industries America, Inc. and **Michael Schuster,** Director, Emerging Technologies, Mitsubishi Power Americas

- Geoff Pyatt | Advancing America's Energy Security in an Era of Transitions
- Grid Modernization meets AI: Investing in the future of transmission and distribution
- IBP | Soft Landing & NAVE:
 Connecting global innovation to
 Brazil's energy sector
- LanzaTech | Reimagining Carbon:
 A truly circular carbon economy built with novel technology and innovative financing
- MIT | Steps to Build Climate & Energy Ventures
- OHI | From Insights to Action: How data is shaping clean energy markets
- Rice University | Next-generation Electrolyzers and Electrolysis
- Rice University | Plasma Foundry for Scalable Industrial Decarbonization

- Rice University | Valuing Naturebased Solutions for CO₂ Removal
- S&P Global | Creating Credible Methane Benchmarks
- S&P Global | Energy Capital Markets Quarterly Review: US tech-power sector romance is about to heat up
- S&P Global | Fireside Chat |
 US Climate Landscape:
 Bridging climate divisions
- S&P Global | Fireside Chat with S&P Global's Head of Culture, Inclusion and Corporate Responsibility
- S&P Global | Harnessing Machine Learning for Efficient CO₂ Storage: Enhancing sustainability
- S&P Global | Leading Global Teams and Cultivating a Collaborative Culture

- S&P Global | Machine Learning 101: How to use AI to dissect well and production data
- S&P Global | Navigating the Energy Transition: Changing spending patterns and their impact
- S&P Global | Practical Applications for AI in Upstream Industry
- S&P Global | Pricing Climate Resilience: Insurance, assets and commodity impacts
- S&P Global | The AI Revolution in Satellite-based GHG Emissions Monitoring and Sustainability
- S&P Global | The Evolving Digital Twin and AI Ecosystem
- S&P Global | The Role of Indexes in the Energy Transition
- S&P Global | The True Cost of Water: Emissions, economics and the path forward

- SAFPAC | Flying Green: SAFPAC's vision for a sustainable aviation future
- Siemens Energy | Energizing Industries Through Lowcarbon Solutions
- SLB | The Well-to-product Integrated Solution for More Lithium, Less Environmental Impact
- Stanford | Solving 21st-century Energy Demand Challenges: A public-industry-education (PIE) approach
- Univ. of Ottawa | Building the Energy Infrastructure in North America Faster than Ever
- WHOI | Monitoring Our Oceans:
 Working at the frontier of global ocean real-time sensing using mass autonomy

Energy Venture Day and Pitch Competition at CERAWeek

The Houston Energy Transition Initiative (HETI), Rice Alliance and TEX-E hosted the fourth annual Energy Venture Day and Pitch Competition at CERAWeek. The event showcases energy ventures driving efficiency and advancements toward the energy transition through fields such as carbon management, advanced manufacturing, hydrogen, grid technology and more. This year's competition was a qualifying event for the Startup World Cup, powered by Pegasus Ventures. The top-scoring venture was invited to compete in the grand finale for a \$1 million investment prize.

The fast-paced competition was designed to connect energy startups with venture capitalists, corporate innovation groups, industry leaders, academics and service providers. Prior to the competition, energy ventures participated in one-on-one meetings with investors. Close to 50 investor groups participated in over 450 meetings with the companies.

Three tracks of competition featured 36 industry startups, and one track, the TEX-E Prize, featured five university startups. The companies pitched in the Innovation Agora at CERAWeek in front of a full crowd of industry leaders.

The startups represented five countries and 15 US states and have collectively raised \$435 million in funding. A panel of judges consisting of industry experts and investors named the top three ventures from each track.



HETI/TEX-E Award Ceremony: Jane Stricker, Senior VP, Energy Transition & Executive Director, Houston Energy Transition Initiative (HETI)

Track A: Hydrogen, Fuel Cells, Buildings, Water and Other Energy Solutions



1st place – Arculus Solutions:
Biman Herlekar, Mechatronics
Engineer and Mona Dajani,
Partner, Global Co-Chair of Energy
Infrastructure & Hydrogen and Co-Chair
of the Energy Sector, Baker Botts

Track B: Advanced Manufacturing, Materials, Fossil Energy and Carbon Management



1st place – Disa Technologies:

Greyson Buckingham, Co-Founder,
President & CEO and Mona Dajani,
Partner, Global Co-Chair of Energy
Infrastructure & Hydrogen and Co-Chair
of the Energy Sector, Baker Botts

Track C: Industrial Efficiency, Decarbonization, Electricity and the Grid



1st place – NearStar Fusion:

Amit K. Singh, CEO and Mona

Dajani, Partner, Global Co-Chair of
Energy Infrastructure & Hydrogen
and Co-Chair of the Energy Sector,
Baker Botts

Energy Venture Day and Pitch Competition at CERAWeek (cont.)

Overall Winner

Arculus Solutions, included an invitation to compete in the Startup World Cup.



Jenna Tabatznik, Associate Investor, Pegasus Tech Ventures; **Biman Herlekar**, Mechatronics Engineer, Arculus Solutions; and **Justin Jackson**, Partner, Pegasus Tech Ventures

Venture Builder offered a "golden ticket" to **Membravo** to participate in the NOV Supernova Accelerator program.



Joel Carter, General Partner, Venture Builder; Joe Sawa, Founder & CEO, Membravo; and Spencer Oulman, Director of Innovation, NOV

TEX-E Prize Winner

The TEX-E Prize highlighted the innovation of five Texas student-led energy startups that competed for \$50,000 in cash prizes where the top three were selected by the judges.



1st place – HEXASpec: Faith Kelnhofer, Chief of Staff, TEX-E; Tianshu Zhai (Sean), Co-Founder, HEXAspec; and Isaiah Hughes, Director, University Partnerships, TEX-E and Climate Entrepreneurship



HETI Innovation Dinner



HETI Innovation Dinner



HETI Innovation Dinner Dialogue: Steve Kean, CEO, Greater Houston Partnership; Jane Stricker, Senior VP, Energy Transition & Executive Director, HETI; and **Bobby Tudor**, CEO, Artemis Energy Partners, Chairman, Houston Energy Transition Initiative

Energy Innovation Pioneers

The 20th annual Energy Innovation Pioneers program featured many of the world's leading early-stage enterprises in energy and sustainability.

Pioneers were selected by a panel of S&P Global technology experts who identify companies—disruptive or enabling—that exemplify:

Invention and creativity

- Scalability
- Feasibility and timeliness
- Superior management

Chosen from a field of over 500 candidates, this year's class of Pioneers was representative of the innovation occurring across the energy spectrum.

Representing a variety of emerging technologies and business models—AI, autonomous drones and robots, distributed computing infrastructure, high-temperature and durable membranes, post-combustion carbon capture, waste-to-low-carbon chemicals—these companies are advancing decarbonization of a complex global energy system.



Energy Innovation Pioneers | Pushing Hard Tech to Commercialization: Carolyn Seto (Chair), Executive Director, Upstream Technology & Innovation, S&P Global; Shreya Dave, Co-Founder & CEO, Via Separations; Wendy Lam, CEO, Capsol Technologies; and Denis Arguin, Vice President, Global Commercialization, Enerkem

2025 Class of Energy Innovation Pioneers

- Capsol Technologies
- Enerkem
- FulcrumAir
- Paces
- Via Separations
- WATTER



Energy Innovation Pioneers | Transforming the Energy Sector Through Digital Technologies: Carolyn Seto (Chair), Executive Director, Upstream Technology & Innovation, S&P Global; James Hancock, CEO, WATTER



Energy Innovation Pioneers | Transforming the Energy Sector Through Digital Technologies: Patrick Arnell, Co-Founder & CEO, FulcrumAir Inc.



Energy Innovation Pioneers | Transforming the Energy Sector Through Digital Technologies: James McWalter, Co-Founder & CEO, Paces

Agora Partner Programs

Impact

4

Leadership Circles

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Topical Forums

5

Women in Energy Events

14

Future Energy Leaders Sessions and Receptions

12

Professional Development Program Sessions 56

NextGen

20 NextGen Amphitheater Sessions

18 NextGen Pods 1 NextGen Dialogues

11 NextGen Lyceums

3 Colloquiums

3 NextGen Meetups

84

NextGen Poster Presentations

5

NextGen Receptions and Dinners

"For us to be able to sit at the table with decision-makers and leaders, to be a part of the conversation, and shape the future of the industry is absolutely invaluable."

– Arif Kamruddin, Managing Director, Marsh

Overview

Partner Programs encompass a dynamic series of events aimed at facilitating high-level interaction among senior executives and officials, and foster engagement by emerging leaders and communities.

- Leadership Circle Summits, Forums and EPICs: Exclusive gatherings that foster dialogue and collaboration among influential leaders under Chatham House rule.
- Future Energy Leaders: A program designed to advance exceptional individuals
 from companies, policy, academic institutions and NGOs to help empower them to
 meet current and future energy challenges.
- **Professional Development Program:** Immersive initiative designed to cultivate leadership skills and strategic thinking among participants, using a comprehensive curriculum.
- Women in Energy: Empowering platform dedicated to amplifying leadership, driving innovation, and highlighting the vital contributions of women across the energy industry.
- **NextGen:** Serves as a vital nexus between academia, industry, and government, fostering a vibrant atmosphere for emerging talent and novel ideas.



North America Forum: Daniel Yergin, Vice Chairman, S&P Global

Leadership Circle Summits

Leadership Circle Summits are invitation-only standing communities with focused, highly interactive discussions on key issues shaping the energy future.



Climate & Sustainability Summit



Global Hydrogen Summit



Technology and Innovation Summit

- Climate & Sustainability: Meeting 1
- Climate & Sustainability: Meeting 2
- Global Hydrogen
- Oil & Gas Innovation Summit
- Technology and Innovation

Leadership Circle Forums

Leadership Circle Forums are topical sessions that vary from year to year, focusing on emerging key developments.



Carbon Accounting Forum



Clean Energy Suppy Chains Forum



Methane Forum

- Al in Energy
- Carbon Accounting
- Carbon Market
- Clean Energy Supply Chains
- Critical Minerals
- Methane
- Mobility
- Nuclear

Professional Development Program

The Professional Development Program (PDP) is committed to cultivation of rising talent, offering learning and networking opportunities with peers and the opportunity to engage in thought leadership discussions with prominent executives. The program kicks off the weekend prior to CERAWeek and offers an immersive career development experience. The curriculum examines energy from global perspectives including geopolitics, economics, energy transition and operational excellence. Participants engage in a series of deep-dive case studies and lectures designed to build leadership skills and strategic thinking.

30 PDP Participants

12 PDP Engagements



Forest L Reinhardt, John D. Black Professor of Business Administration, Harvard Business School



Jenny Yang, Global Head of Power and Renewables Research, S&P Global Commodity Insights



Professional Development Class of 2025



Daniel Yergin, Vice Chairman, S&P Global



Eleonor Kramarz, Global Head, Energy Transition Consulting, S&P Global Commodity Insights



Energy Transitions: Technological innovation in the energy sector

Future Energy Leaders

The Professional Development Program (PDP) is committed to cultivation of rising talent, offering learning and networking opportunities with peers and the opportunity to engage in thought leadership discussions with prominent executives. The program kicks off the weekend prior to CERAWeek and offers an immersive career development experience. The curriculum examines energy from global perspectives including geopolitics, economics, energy transition and operational excellence. Participants engage in a series of deep-dive case studies and lectures designed to build leadership skills and strategic thinking.

158

FEL Participants

14

FEL Engagements

Guest Speakers

Atul Arya, Senior Vice President & Chief Energy Strategist, S&P Global

Louis Carranza, Managing Director, Head of CERAWeek, S&P Global

Kenneth Medlock, Senior Director, Center for Energy Studies, Rice University

Inez Moriarty, Senior Account Based Marketing Manager, AWS **Carlos Pascual,** Senior Vice President Geopolitics and International Affairs, S&P Global

Vijay Swarup, Senior Director, Climate Strategy and Technology, ExxonMobil

Christine Knox, North America Lead and Senior Business Development Manager, New Energies, Chemicals & Fuels, Bechtel Scott Tinker, Chairman and CEO, Switch Energy Alliance; CEO, Tinker Energy Associates; and Director Emeritus, Bureau of Economic Geology at University of Texas Austin

Lilly Tran, Senior Client Partner & Sector Leader, Korn Ferry

Matt Wilhoit, Vice President of Sales, North America, FuelCell Energy

John Williams, Professor of Civil and Environmental Engineering, Massachusetts Institute of Technology (MIT)

Darryl Willis, Corporate Vice President, Energy & Resources Industry, Microsoft



Welcome Reception



Breakfast



Content session: Kenneth Medlock, Senior Director, Center for Energy Studies, Rice University

Women in Energy Program

A strategic initiative designed to elevate leadership, drive innovation, and spotlight the critical contributions of women across the energy sector. By harnessing the power of diverse perspectives, this program fosters a more resilient, forward-thinking industry. Whether engaging established executives or emerging leaders, Women in Energy is a catalyst for progress—shaping the future of energy with equity, vision, and impact.

2

Partner Programs (Roundtable and Breakfast)

2

Partner sponsored receptions

2

Regional Women in Energy Meet-ups

Wednesday Night Dinner



Women in Energy Dinner: Daniel Yergin, Vice Chair, S&P Global and panelists Shaima Al-Ghunaim, Executive Vice President, Planning and Finance, Kuwait Petroleum International; Kendra Rauschenberger, General Partner, Siemens Energy Ventures, Siemens Energy; Leanne Todd (Chair), Head of Energy Transition, Sustainability & Services, S&P Global Commodity Insights; Marina Md Taib, Senior Vice President, Corporate Strategy, PETRONAS; and Caroline Golin, Global Head of Energy Market Development and Innovation, Google



Technology and Innovation Paving the Way for Women in Energy: SueLena Thompson (Introduction), Producer, S&P Global; Leanne Todd (Chair), Head of Energy Transition, Sustainability & Services, S&P Global Commodity Insights; Marina Md Taib, Senior Vice President, Corporate Strategy, PETRONAS; Caroline Golin, Global Head of Energy Market Development and Innovation, Google; Shaima Al-Ghunaim, Executive Vice President, Planning and Finance, Kuwait Petroleum International; and Kendra Rauschenberger, General Partner, Siemens Energy Ventures, Siemens Energy

Women in Energy Program (cont.)



Tze San Koh, President, China Gas Marketing, ExxonMobil, welcomes attendees to the *Women in Energy Reception* hosted by ExxonMobil



Women in Energy Dinner: Houston Grand Opera's Laura Bleakley, pianist, Ani Kushyan, mezzo-soprano, and Elizabeth Hanje, soprano



Women in Energy Roundtable

NEW for 2025: NextGen

NextGen at CERAWeek serves as a vital nexus between academia, industry, and government, fostering a vibrant atmosphere for emerging talent and novel ideas. This initiative enriches the existing innovation community by attracting top graduate students from diverse fields and connecting them industry leaders, and fortifying industrial-academic collaboration to translate transformative ideas into reality.

The NextGen community includes graduate students in over 27 disciplines, fellows in diverse research areas, energy center directors, senior faculty, academic administrators, Chief HR Officers, corporate recruiters, and Chief Technology and Innovation Officers, all dedicated to advancing innovation in the energy sector.

Through curated programming, collaborative discussions, and targeted networking events, NextGen ignites creativity and inspires incoming trailblazers to discover and develop groundbreaking solutions to the energy industry's most pressing challenges.



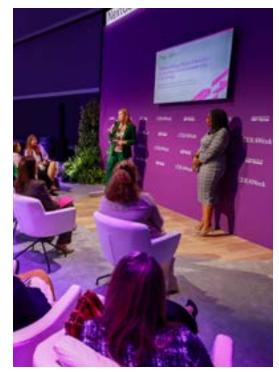
Scan or click here to view the NextGen at CERAWeek in Review 2025 in its entirety



NextGen Dialogue | "NextGen" Future Energy Leaders: Louis Carranza (Chair), Managing Director & Head of CERAWeek; Maria Zuber, Presidential Advisor for Science and Technology Policy and E.A. Griswold Professor of Geophysics, Massachusetts Institute of Technology (MIT); and Vijay Swarup (Co-Chair), Senior Director, Climate Strategy & Technology, ExxonMobil



NextGen Meetup | Women in Energy Regional Meetup



NextGen Pod | Women's Energy Network Houston – Accelerating Women's Leadership in the Energy: Angela Hernandez, Vice President, Business Development, Deloitte and Tai Prince, Global Corporate Social Responsibility Manager, TechnipFMC

NEW for 2025: NextGen (cont.)



Inaugural NextGen Cohort - CERAWeek 2025

NextGen formats include:

NextGen Amphitheater — Dedicated zone in the Nexus for discussions oriented toward advancing a passionate, skilled workforce; showcasing emerging innovation; and deepening collaboration between industry, academia, early-stage startups and government.

NextGen Colloquium — Exclusive, interactive format with discussions focused on enhancing collaborative partnerships between academia, industry, entrepreneurs, and government.

NextGen Dialogue — Senior officials from government, academia, industry and startups share insights and strategies to attract talent and enable continued innovation. NextGen Dialogue is in the Executive Conference.

NextGen Huddle — A semi-private setting conducive for employers to connect with graduate students exploring career opportunities, as well as for faculty to delve deeper into their research with potential industry partners.

NextGen Lyceum Lab — Interactive seminars that enhance skills, explore early-stage research, showcase and promote industrial-academic partnership, and facilitate engagement with experts to drive impactful solutions.

NextGen Meetup — Small, informal gathering of communities that share a common interest.

NextGen Pod — Featuring early-stage research and purpose-driven innovation from academia, incubators, labs, and energy centers.

NextGen Poster Session — Showcasing early-stage research from universities and incubators using posters, whiteboards and other media at kiosks in Innovators Row.

Agora Partner House Highlights

By the numbers

9

Partner Houses

8

VIP and Partner tours

46

General Attendee tours



Agora Partner Houses video

Government Officials House Visitations*

- United States | Hon. Chris Wright, Secretary of Energy,
 U.S. Department of Energy
- France | Office of French Ambassador



Hon. Chris Wright, Secretary of Energy, U.S. Department of Energy tours Amazon House



Hon. Chris Wright, Secretary of Energy, U.S. Department of Energy visits Innovators Row

Agora House Tours*



Future Energy Leaders on the **What's New in the Agora Tour** visit the HETI (Houston Energy Transition Initiative) room



Consulting Program Agora Tour

Agora Partner Houses



















Agora Partner Houses (cont.)









GNO, Inc.







Methane Innovation House





Agora Partner Houses (cont.)



















Agora Partner Installations

Agora Partner Installations in the Innovation Agora offer participants an opportunity to explore and experience leading-edge solutions through interactive demonstrations from Partner organizations.







ExonMobil









Agora Partner Installations (cont.)



S&P GlobalCommodity Insights





S&P GlobalCommodity Insights



S&P Global

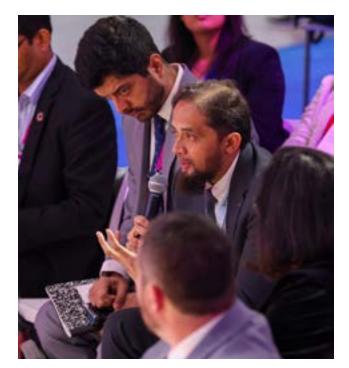
Engage



Climate Hub | Al's Impact on Labor Markets and Employment: Natznet Tesfay, Vice President, Insights and Analysis, S&P Global Market Intelligence and Chris Cantarella, Senior Client Partner, Global Technology Markets, Global Sector Leader, Software, Korn Ferry



Bloomberg's **Alix Steel** with **Scott Sheffield,** Founder, Pioneer Natural Resources







Engage (cont.)





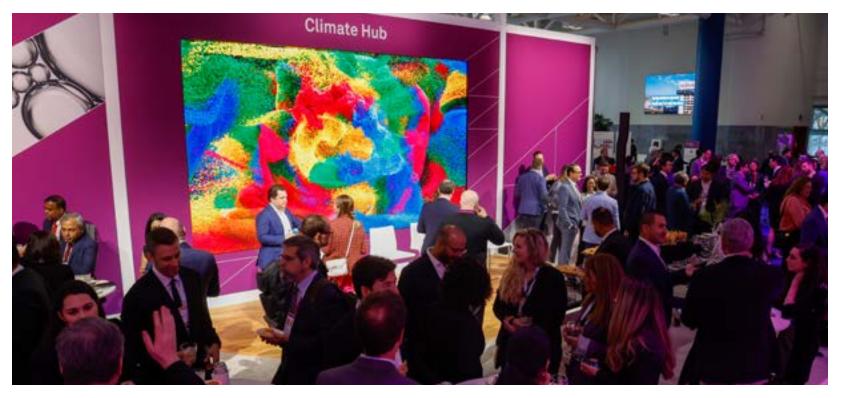


Opening night reception in The Nexus





Engage (cont.)







Agora Pod | Carbon Upcycling: Transforming CO₂ into Critical Building Materials through Carbon Mineralization: audience Q&A

Engage (cont.)











Agora Partnership

Overview

Innovation Agora Partners support the exciting global innovation and technology community dedicated to creating new pathways and solutions for the energy future, contributing their expertise and experiences to this immersive environment.

The program integrates branding, knowledge contribution, media support, delegation support, hosting and networking into a single, tailored strategy that supports the Partner's objectives.

Partner Benefits

- Peer hosting, interaction and networking focused on advancing business
- Thought leadership and executive engagement
- Partner recognition, media, virtual platforms, and CERAWeek branding program

Partners benefit from high-level participation and direct engagement in CERAWeek content and community development. Designed to maximize the impact of a Partner's CERAWeek experience for executives, Partnership Programs offer opportunities to deepen relationships with key stakeholders, develop and share ideas and thought leadership, enhance visibility and communicate key messages to a wider audience.

Partnership enables active participation in all key components of CERAWeek in a single, integrated program.

Partnership Information

For CERAWeek Partnership information, contact:

Martha O'Connor

Executive Director – CERAWeek +1 617 413 2049 martha.oconnor@SPGlobal.com



World Nuclear Partner Reception



PETRONAS Reception



Solar Energy Industry Association (SEIA) Reception

Partnership

Agora Partners









































































Partnership (cont.)

Agora Partners































Agora Affiliates





Partnership (cont.)

Agora Trailblazers

































University Partners







CERAWeek Podcast with Atul Arya

In its second season, the CERAWeek Podcast with Atul Arya, Senior Vice President and Chief Energy Strategist, S&P Global, featured 13 thought-provoking episodes that set the tone for CERAWeek 2025. In the lead-up to the conference, the podcast brought together visionaries and decision-makers to explore the themes that would define this year's dialogue — offering a preview of the insights and innovations shaping the global energy conversation.

Daniel Yergin, Chairman of CERAWeek and Vice Chairman of S&P Global

Sanjiv Lamba, CEO and Member of the Board of Directors of Linde

Toby Rice, President and CEO of EQT Corporation

Ricardo Markous, CEO of Tecpetrol

Jacob DeWitte, Co-Founder and CEO of Oklo

Francesco Mazzagatti, CEO of Viaro Energy

Jimmy Rojas, CEO of EVOLOH

Matt Berchtold, Chief Product Officer of Context Labs

Eirik Wærness, Senior Vice President and Chief Economist of Equinor

Dan Eggers, EVP and Chief Financial Officer of Constellation Energy

Tim Holt, Executive Board Member of Siemens Energy

Bader Al-Attar, Managing Director of Planning and Finance of Kuwait Petroleum Corporation (KPC)

Howard Dieter, Vice President of Environmental, Health and Safety of Jonah Energy

Ed Lush, Director of Low Carbon Products and Energy Ventures of Williams

CERAWeek Podcast with Atul Arya is available across all major platforms.





Scan QR Code to subscribe now

We look forward to seeing you at CERAWeek 2026

CERAWeek® by S&P Global

March 23-27, 2026 Houston, Texas



Daniel Yergin, Vice Chairman, S&P Global and CERAWeek Co-Chairman with Louis Carranza, Managing Director, Head of CERAWeek, S&P Global and Jamey Rosenfield, Senior Advisor, Founder & Co-Chairman of CERAWeek, S&P Global

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