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2016 | New Zealand

DOWNSTREAM

The Energy Sector's Annual Strategic Forum

2-3 March 2016 | SKYCITY, Auckland

KEY THEMES

Transformative technologies: opportunities in the coming decade

The impacts of sector change on our large energy users

The future role of gas in New Zealand's energy mix

SPECIAL FEATURES FOR 2016

Specialist streams

DAY ONE
Large Energy Users

DAY TWO
Gas Sector

Return of the

New Zealand
NETWORK MANAGERS' FORUM 2016

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2016 | New Zealand

DOWNSTREAM

The Energy Sector's Annual Strategic Forum

Welcome to the energy sector's premier event

The 2016 event will focus on the key opportunities and challenges that lie ahead for New Zealand's world class energy system. This must-attend two-day event will offer insights into generation, transmission, distribution and retail issues and trends, this time in the context of the technology revolution.

New in 2016 is the introduction of break-out sessions focusing on the gas sector and large energy users - more content for a wider audience.

LARGE ENERGY USER STREAM

- Designed for large energy users who spend more than $2 million per annum on energy
- Focusing on the impact of sector change on large energy users, key trends in energy management, energy efficiency, managing energy risk and technology

GAS STREAM

- Created for delegates focusing on New Zealand's gas sector
- Focusing on gas market evolution, making the most of our gas resource and major gas user perspectives

2nd New Zealand Downstream Network Managers' Forum

TUESDAY 1 MARCH, 1.30 - 5.00PM

A complimentary half-day forum for electricity networks covering technology, strategy and operations. Invitations out soon. More information available at www.nzdownstream.co.nz

Sponsored by Nexans

INVITATION ONLY

WHY ATTEND?

- Hear international perspectives and insights
- Hear from industry leaders on the key strategic issues
- Help set the future direction of the energy industry in New Zealand
- Connect and network with over 300 energy sector leaders and professionals
- All key energy sector organisations brought together including asset owners, large energy users, key suppliers, policy-makers, regulators and industry associations
- Identify opportunities for collaboration to respond to sector challenges

WHO SHOULD ATTEND?

- C-Level Executives/General Managers
- Chief Executives/Managing Directors
- Company Directors/Board members
- Energy Managers/Commercial Management Consultants/ Planning Managers
- Sales/Business/Communication Managers
- Legal/Policy/Regulatory Affairs
- Engineering/Fuels/System Managers
- Investment Banking/Finance

WHAT WILL YOU TAKE AWAY FROM THE NEW ZEALAND DOWNSTREAM 2016 FORUM?

- New connections and business opportunities
- New ideas and knowledge to inform business strategies
- Inspiration to take the next step

Downstream 2016 brings the key regulatory, strategic, commercial and stakeholder issues to the table in a unique event that is heavy on discussion panels and high-level presentations.

New Zealand Downstream Gala Dinner

WEDNESDAY 2 MARCH, 6.30PM

Join us at the 2016 gala dinner to round off the first day.

Take advantage of the informal atmosphere to connect with your peers, enjoy a great dinner and be entertained by a dinner speaker with one heck of an inspirational story. A journey from the freezing works, to a rock band, to the army and then a pioneer of the digital age.
It will be a great night.

Book a table for your clients or team.
See the back page for booking details.

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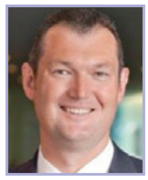
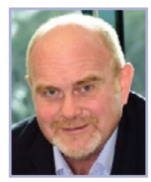
Speakers include:



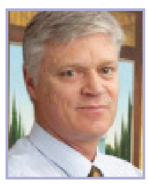
Nigel Barbour

Brent Layton

Dennis Barnes



Simon Mackenzie



Mark Binns

INTERNATIONAL INSIGHTS

Kobad Bhavnagri
Bloomberg New Energy Finance
•
Brett Milne
Ergon Energy

DAY ONE 2 MARCH 2016

8.00 Registration and coffee in the NZ Downstream exhibition

9.00 Welcome from the Chair for day one
Toby Stevenson - *Director,* **Sapere Research Group**

9.10 INTERNATIONAL INSIGHT: What's happening across the ditch and how does that affect us?
Are Australian utilities, regulators and policy makers ahead of the game in adapting to the new energy future of clean tech and prosumers? Is Australia heading in a different direction to New Zealand?

- The latest policy developments
- Technology's impact on generation, network and retail businesses
- Energy investment trends
- The response from the large Australian utilities

Kobad Bhavnagri - *Head of Australia,* ***Bloomberg New Energy Finance***
In association with Stellar Consulting

9.50 LEADERS' PANEL: The changing face of the NZ energy industry
Transformative technologies are changing the outlook for the sector, with growing installations of solar PV, advances in battery technology and increasing uptake of electric vehicles all requiring a shift in thinking for all sector participants. How do we prepare, as an industry, for these changes while continuing to deliver value for consumers?

- The evolution of consumer energy needs, and how to best serve them
- The industry response to emerging technologies
- The appropriate industry structure for the changing energy outlook in New Zealand
- Trends in similar overseas markets and the lessons for New Zealand
- The sector's role in supporting economic growth and prosperity in New Zealand

Nigel Barbour - *Chief Executive,* **Powerco**
Dennis Barnes - *Chief Executive,* **Contact Energy**
Mark Binns - *Chief Executive,* **Meridian Energy**
Grady Cameron - *Chief Executive,* **Delta**
Ralph Matthes - *Executive Director,* **MEUG**
Steve O'Connor - *Chief Executive,* **Flick Energy**
Fraser Whineray - *Chief Executive,* **Mighty River Power**
Facilitator: John Hancock - *Director,* **Signature Consulting**
In association with Gentrack

10.50 Morning break & refreshments

11.20 LARGE ENERGY USER STREAM COMMENCES
(see separate agenda)

(Main Downstream plenary continues)

11.20 10:10:10 - Planning through uncertainty and change
The sector faces disruption of historic proportions which will affect future supply and demand. Given this environment, how does a generation, transmission or distribution asset owner adapt its plans? Three presenters will provide a perspective on how they respond to uncertainty when making material asset decisions.
Tracey Hickman - *GM Generation,* **Genesis Energy**
Alex Ball - *Chief Financial Officer,* **Transpower**
David Freeman-Greene - *GM Commercial,* **Orion**
In association with PwC

12.00 PANEL DISCUSSION: What is the future for generation in New Zealand?
In response to an oversupply of generation in the electricity market, generators have taken action. Mighty River Power and Contact Energy have shut their gas-fired generation plants in Auckland, and Genesis Energy has signalled it will shut its two remaining coal units at Huntly in 2018.

- The role for the remaining thermal generation
- The impact on dry-year risk and security of supply
- Trends in distributed generation
- What are the implications for transmission investment?

Phil Gibson - *GM Hydro & Wholesale,* **Mighty River Power**
Tim Cosgrove - *GM Operations and Development,* **Nova Energy**
Robert Miller - *GM Generation,* **Pioneer Generation**
John Clarke - *GM System Operations,* **Transpower**
Simon Coates - *GM Director,* **Concept Consulting**
Facilitator: Phillip Anderson - *Portfolio Manager,* **Cumulus**

12.50 Lunch sponsored by Landis+Gyr

1.50 PRESENTATION: The Electricity Networks Association and the renaissance of distribution
New Zealand's 29 diverse distribution companies have an important role to play in the energy sector of the future. Hear from the Chief Executive as to the association's strategy going forward, and the priority levels of important issues such as regulatory change, the impact of disruptive technologies, and smart networks.
Graeme Peters - *Chief Executive,* **ENA**

2.20 PANEL DISCUSSION: What should electricity pricing look like for consumers in 2016 and beyond?
With the changing landscape of New Zealand's energy sector, it might be that 'throughput' is no longer the best lens to look at pricing through.

- What would be the best, and fairest, pricing model going forward?
- What are the opportunities for the industry to work together to ensure optimal outcomes for the sector and consumers alike?

Gillian Blythe - *Strategy and Performance Manager,* **Meridian Energy**
Nick Russ - *Chief Advisor,* **Commerce Commission**
Jeremy Cain - *Regulatory Affairs and Pricing Manager,* **Transpower**
Craig Evans - *Manager Retail and Network Markets,* **Electricity Authority**
Greg Skelton - *Chief Executive,* **Wellington Electricity**
Facilitator: Steve Wightman - *Managing Consultant,* **PA Consulting**

3.10 FOUNDATION PARTNER ADDRESS: The new Electricity Authority strategy

The Electricity Authority has the statutory objective to promote competition, reliability and efficiency in the electricity industry for the long term benefit of consumers. The prospect of technological changes materially affecting electricity markets over the next few years appears very high.

The Chair of the Authority will discuss the Authority's approach to meeting this challenge by trying to ensure it's Code making and other activities facilitate consumers receiving the benefits of these technological changes and that they do not act as a hindrance.

Brent Layton - *Chairperson,* **Electricity Authority**

3.40 Afternoon break & refreshments

4.10 PRESENTATION: Contact Energy - leveraging Ahuroa and managing a fluid gas book

Contact Energy owns gas-fired generation capacity at Stratford, which is complemented by a strong geothermal and hydro generation portfolio.

Contact Energy used 22 PJ of gas for generation in FY2015 and had contracted 18 PJ for the 2016 year, dropping to 5 PJ from 2018. It has the unique position of being the only company to have its own gas storage facility at Ahuroa, which allows it to cover its own dry-year risk and rely less on the costly take-or-pay arrangements it was once exposed to. The injection and extraction capacity of Ahuroa could be increased – at a cost – and the facility can support offers of flexible gas or electricity supply to other operators.

This presentation will explore how Contact uses Ahuroa to manage its gas business, and what the future looks like in terms of operations and potential developments.

James Kilty - *Chief Generation & Development Officer,* **Contact Energy**

4.45 PRESENTATION: Regional energy profile - Bay of Plenty

Tauranga is booming, with population growth steadily trending up, and the local economy responding well to the boost in jobs and infrastructure. The Bay of Plenty Regional Energy Strategy is being refreshed. Does the Bay of Plenty provide a blueprint of the unique energy challenges and opportunities facing regional New Zealand?

Speaker to be confirmed

5.30 Summary remarks from the Chair

5.35 Networking Drinks

6.30 Dinner sponsored by Jade Software

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DAY TWO 3 MARCH 2016

8.30 Welcome back from the Chair for day two

Rod Oram - *Business Journalist*

8.35 INTERNATIONAL INSIGHT: Solar PV – Queensland's distributed generation story

With the current growth rates in solar PV installations, do we really understand the potential impacts? There are parallels with other countries that have already experienced disequilibrium in their energy sector as a result of increased distributed renewable generation.

Ergon Energy has an $11bn asset base including generation and distribution assets. Ergon Retail also supplies over 720,000 customers and has over 23% of the residential customer base with solar connections. Across Queensland it has 450K solar installs. Ergon Retail recently released an Expression of Interest for the energy rights to 150MW of large scale renewables.

- Background to the extent of distributed renewable generation in Queensland and how it has been encouraged
- Prevalence of micro/home scale generation vs. small utility scale generation
- Benefits derived from building distributed generation
- The main unintended or unforeseen consequences
- Learnings for the New Zealand energy industry

Brett Milne - *Group Manager Retail Customer Experience & Marketing,* **Ergon Energy**

9.25 PANEL DISCUSSION: Large energy user feedback - Round 2

Last year we heard from some of the energy sector's largest customers on what they wanted to see from the industry, including areas for improvement.

We have invited some large energy users to this event again, to discuss what has changed over the last twelve months and whether their priorities remain the same. What new issues have arisen on the back of the main industry developments?

Linda Thompson - *Energy Manager,* **Fonterra**

Lyndon Haugh - *Energy Manager,* **Oji Fibre Solutions**

Alan Eyes - *Energy Manager,* **NZ Steel**

Panellist under invitation

Facilitator: Richard Hale - *Director,* **Hale & Twomey**

10.15 Morning break & refreshments

10.45 GAS SECTOR STREAM COMMENCES
(see separate agenda)

(Main Downstream plenary continues)

10.45 PANEL DISCUSSION: Distributed battery storage

Battery storage will soon be mass-marketed as an in-home option. How far is the technology away from having mass-market appeal to both commercial and residential consumers?

- In New Zealand's energy 'system', how likely is widespread adoption of battery storage in the commercial and residential markets?
- Comparison with existing energy storage options such as hydro
- The likelihood of community scale grid defection
- How mobile battery storage (EVs) will affect widespread uptake

Simon Mackenzie - *Chief Executive,* **Vector**

Brendan Winitana - *Chair,* **Stored Energy Association of New Zealand**

Ian Mason - *Research Fellow,* **University of Canterbury**

Facilitator: Rod Oram - *Business Journalist*

11.35 FOUNDATION PARTNER ADDRESS: Navigating the revolution

The Commission has previously signalled that the review of the rules it uses to police lines companies and gas networks is unlikely to result in substantial changes. The Commission has also said, "a number of overseas electricity sectors are confronting similar issues, although the drivers, levels of deployment and resulting impacts vary". Key review issues identified by the Commission during an extensive Input Methodologies Review consultation process include:

- The future impact of emerging technologies in the energy sector
- How price-quality path mechanisms allocate risk between consumers and suppliers
- The cost effectiveness of the customised price-quality path requirements

Sue Begg - *Commissioner,* **Commerce Commission**

12.10 Lunch sponsored by Pulse Energy

1.10 PANEL DISCUSSION: The power of competition - a customer's gain

In 2015, Statistics NZ put out data that showed New Zealand households faced zero increases in the annual price they paid for electricity. Retail churn is higher, with more retailers to choose from. Retailers are having to keep pace with the changing market, and make their case to retain market share, or to attract new customers.

- Drivers behind the evolving energy retail business
- Retailer response to changing residential customer expectations
- Developing better relationships with energy consumers
- Is market segmentation using multiple brands still relevant?

Vena Crawley - *Chief Customer Officer,* **Contact Energy**
Gary Holden - *Chief Executive,* **Pulse Energy**
James Munro - *General Manager Customer,* **Mighty River Power**
Ari Sargent - *Chief Executive,* **Powershop**
Julian Kardos - *Managing Director,* **Electric Kiwi**
Facilitator: Nigel Broomhall - **Break Point Consulting**

2.00 PERSPECTIVE: Navigating the revolution

Customers are important whether they be large consumers or small households, more and more people are voting with their feet. It is not unreasonable to assume that customers have access to all the relevant information required to make a decision.

The energy sector is not the only sector facing disruption and an increasing pace of change. Jason has played a key role in the reinvention of Telecom to Spark New Zealand, in order to better reflect the new world of digital services in which the business now operates.

This presentation will provide a perspective on the challenges faced, and how Spark is tackling them.

Jason Paris - *CEO Home, Mobile and Business,* **Spark**

2.40 PRESENTATION: Creating the new energy future

Vector has been steadily positioning itself to meet the challenges of a much-changed energy outlook, and to take advantage of first mover opportunities. To meet the call for a smart grid to supply the smart, efficient city of the future, Vector has been investing in new technologies for its network including:

- A partnership with Tesla to offer Tesla Energy's Powerwall in-home battery storage solution, which also helps encourage the uptake of solar PV
- Installing fast charging stations around Auckland to promote electric vehicle uptake

What does Vector's future of energy look like?

Simon Mackenzie - *Chief Executive,* **Vector**

3.10 Afternoon break & refreshments

3.40 PRESENTATION: Political debate five years in the making

Over the past five Downstream conferences, some key trends have emerged:

- Industry image and consumer engagement
- Industry restructuring and regulation
- The impact of disruptive technologies
- How to manage an uncertain demand outlook
- Regulatory changes and the political agenda

John Hancock - *Director,* **Signature Consulting**
Toby Stevenson - *Director,* **Sapere Research Group**

4.00 POLITICAL LEADERS' DEBATE: What are your energy policy priorities, and how do you propose to deliver them?

This debate will feature the Labour, National and the Green parties sharing their views on priorities going into the next election period.

- 90 per cent renewables target: should we be striving for it, and how should we get there?
- Competition in the retail market and delivering value to New Zealand energy consumers
- Industry structure and whether this needs any reforms
- Emerging technologies such as electric vehicles, solar panels and battery technology: where do these fit on the agenda?
- Policies needed to address energy poverty

Party speakers will be confirmed once the house sitting calendar is available

5.00 Closing remarks from the Chair and end of conference

AGENDA DAY ONE: 2 MARCH 2016
LARGE ENERGY USER STREAM

10.50 Morning break & refreshments

11.20 Welcome from Chair
Ewan Gebbie - *Executive Officer*, **EMANZ**

11.25 **PANEL DISCUSSION: Key trends for large energy users**
Energy attracts a great deal of attention from New Zealand's largest industrial and commercial organisations. Our panel will discuss the key sector trends large energy users should be thinking about.
- The biggest barriers to energy efficient operations
- Consequences of the prosumer revolution
- Energy productivity and the link to GDP
- The value of energy partnerships
- The growing trend of selling energy as an outsourced service

Stephen Drew - *Manager New Zealand*, **EnerNOC**
Fraser Jonker - *Chief Executive*, **Pioneer Generation**
Ralph Matthes - *Executive Director*, **MEUG**
Greg Visser - *General Manager Business*, **EECA**
Facilitator: Ewan Gebbie - *Executive Officer*, **EMANZ**

12.15 **USER PROFILE: ANZ**
ANZ has been on a pathway to reducing energy consumption over the past few years. ANZ will share some insights into how businesses can cut down on energy costs, and do so within existing budgets and reporting structures.
Symond Ross - *Environmental Sustainability Manager*, **ANZ**

12.50 Lunch Break

1.50 **PRESENTATION: Energy partnerships and new energy solutions**
Large industrial and commercial energy users have a range of new and more beneficial energy services available to them including demand response, solar PV and district energy schemes. New Zealand's councils, DHBs, universities and large commercial energy users need to know their options. Chris explores the options through recent case studies and shares some thoughts on the 'energy as a service' trends he is seeing emerge.
Chris Dawson - *Energy Solutions Manager*, **Pioneer Generation**

2.20 **PANEL DISCUSSION: Best practice energy management**
- Integrating energy information into your business decision-making
- Understanding the technical and commercial skills needed
- The shift from energy efficiency to energy productivity
- The shift to selling 'energy as a service'

Denis Agate - *Energy Manager*, **Auckland University**
Michelle Dawson - **Auckland Council**
Frans Plugge - *Manager Energy Solutions*, **Pioneer Generation**
Jonathan Pooch - *Managing Director*, **DETA Consulting**
Facilitator: Rhys Holding

3.10 **SPONSOR PRESENTATION**

3.35 Close of stream and thanks from Chair

3.40 Afternoon break & refreshments

AGENDA DAY TWO: 3 MARCH 2016
GAS STREAM

10.15 Morning break & refreshments

10.45 Welcome from Chair
Steve Bielby - *Chief Executive*, **Gas Industry Company**

10.50 **PANEL DISCUSSION: Making the best use of our gas resource**
- The link between low oil prices and the downstream gas market
- The impact of electricity generation trends on the gas sector
- Background to recent growth in the LPG sector
- Where an increased future demand for gas will come from

Stuart Dickson - *GM Gas*, **Powerco**
Chris Jewell - *GM Portfolio Management*, **Genesis Energy**
Albert de Geest - *Chief Executive*, **Liquigas**
Facilitator: Len Houwers - *Director*, **Aretê Consulting**

11.35 **PRESENTATION: From the large gas consumer's perspective**
- Evolving gas procurement strategy requirements
- The competitive position of gas against energy substitutes
- Impact of recent industry developments e.g. closure of thermal plant
- Security of supply risk concerns
- Regional perspectives

Richard Hale - *Director*, **Hale & Twomey**

12.10 Lunch break

1.10 **PANEL DISCUSSION: Gas market evolution**
- Gas spot market performance, has it achieved what it set out to do?
- Addressing concerns about opaque gas prices
- The impact for retailers and consumers
- The end-point for the gas market

Alan Eyes - *Energy Manager*, **NZ Steel**
Ian Dempster - *GM Operations*, **Gas Industry Company**
Matt Wilson - *General Manager*, **Transact Management**
James Whistler - *General Manager*, **emsTradepoint**
Facilitator: John Small - *Director*, **Covec**

2.00 **PRESENTATION: Getting gas on the agenda - a shift in competitive balance**
Simon will consider the impacts of new consumer energy technologies on the relative competitive positions of gas versus electricity, and the implications for network owners and other industry participants.
Drawing on the experiences from overseas, as well as presenting his own analysis of the situation in New Zealand, he will explore some of the regulatory and public policy challenges presented by these new technologies.
Simon Coates - *Director*, **Concept Consulting**

2.40 **SPONSOR PRESENTATION**

3.05 Close of stream and thanks from Chair

3.10 Afternoon break & refreshments

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Conference + Dinner	$2060 + GST PER PERSON SAVE $200	$2260 + GST PER PERSON
Dinner only	$210 + GST PER PERSON	$210 + GST PER PERSON
Dinner - Table for 10	$2100 + GST PER TABLE	$2100 + GST PER TABLE

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YOU HAVE SEVERAL OPTIONS:
- Send a substitute delegate in your place
- Confirm your cancellation in writing (letter, fax or email) at least ten working days prior to the event and receive a refund less a $300+GST service charge per registrant. Regrettably, no refunds can be made for cancellations received after this date.

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