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New Zealand DOWNSTREAM

The Energy Sector's Annual Strategic Forum 2015

4-5 MARCH 2015, SKYCITY CONVENTION CENTRE, AUCKLAND

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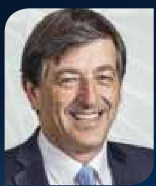
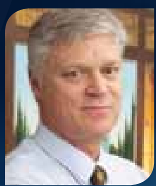

Michael Stiassny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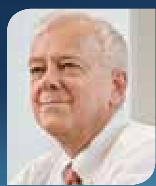
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Welcome

4-5 MARCH 2015, SKYCITY CONVENTION CENTRE, AUCKLAND

Downstream 2015 strategic forum is the New Zealand premier event for everyone involved directly or indirectly in the energy sector.

This must-attend two-day event will offer insights into current energy sector challenges, this time with a focus on changing consumer requirements and the impact of new technology.

This age of information and technology empowers the consumer to make better decisions. The energy industry is not immune to changing consumer needs. To retain and increase market share, energy companies need to deliver value to consumers. With a great deal of new technology set to 'revolutionise' the customer experience, how does the sector justify the net benefit to energy users?

We would like to invite you to join us at New Zealand's premier energy sector event that brings together influencers and representatives from the downstream energy industry. The 2014 event saw over 330 delegates convene, and for 2015 a focus on consumers and the impact of the latest technology, will assist in setting the future direction for the industry.
We are looking forward to seeing you in March.

Lana Mihelčič
Portfolio Manager - Infrastructure, Engineering, Resources
Conferenz

Neil Wembridge
General Manager - Energy
Freeman Media

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The Energy Sector's Annual Strategic Forum 2015

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NEW FOR DOWNSTREAM 2015 **INVITATION ONLY**

Downstream Network Managers' Forum

A complimentary half day forum for electricity network managers and their teams discussing key industry issues including real time condition assessment, a smart grid forum update and network business leaders' panel.

More information available on the programme page of the Downstream website.

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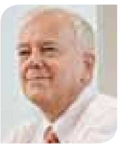
FEATURED SPEAKERS

Alan McCauley
Meridian Energy



Albert Brantley
Genesis Energy

Alison Andrew
Transpower

Brent Layton
Electricity Authority

Carl Hansen
Electricity Authority

Chris O'Hara
Trustpower

Fraser Whineray
Mighty River Power

Gareth Williams
Vector

Lynne Chester
The University of Sydney

Mark Berry
Commerce Commission

Mark Binns
Meridian Energy

Murray Streets
Saatchi & Saatchi

Steve O'Connor
Flick Electric

Vince Hawksworth
Trustpower

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Agenda

4-5 MARCH 2015, SKYCITY CONVENTION CENTRE, AUCKLAND

DAY ONE 4 MARCH 2015

8.00 **Registration and coffee in the Downstream exhibition**

9.00 **CONFERENCE OPEN: Welcome from the Day One MC**
James Elliott, *Professional MC*

9.10 **MINISTERIAL ADDRESS**
Hon Simon Bridges - *Minister of Energy and Resources*

9.30 **LEADERS' PANEL DISCUSSION: Shifting focus from large capital projects to delivering consumer value - challenge to the industry**
All key energy companies are in the business of delivering value to consumers, but how good are they at it? With a great deal of new technology set to 'revolutionise' the customer experience, how does the sector justify the net benefit to energy users?
- How do our consumers currently perceive the 'value' delivered by the energy industry?
- Is the modern consumer growing more engaged with their energy company? Is that what they want?
- The impact of multi-fuel, multi-product offerings
- Post-election priorities and the looming issue of Tiwai Point
- What are the priorities in other similar international energy markets, and do these translate to the New Zealand situation? How do we compare and what can we learn?
- The future for large scale generation with the growing trend in off-grid and distributed generation

IN ASSOCIATION WITH GENTRACK

Alison Andrew - *Chief Executive,* Transpower
Albert Brantley - *Chief Executive*, Genesis Energy
Mark Binns - *Chief Executive,* Meridian Energy
Vince Hawksworth - *Chief Executive,* Trustpower
Carl Hansen - *Chief Executive,* Electricity Authority
Fraser Whineray - *Chief Executive,* Mighty River Power
Facilitator: Toby Stevenson - *Director,* Sapere Research Group

10.30 **PRESENTATION: The consumer - perception and reality**
Consumer expectations of brands and businesses are continuing to change in a post-digital era. It's easy to assume that competitive and reputational advantage is to be found in better meeting category needs. Murray Streets will argue that brands in a low involvement, low interest category must move beyond generic category needs if they are to stand any chance of forging better reputations. Drawing on revelations from consumer research and trends and using examples from other categories and brands, Murray will issue a series of engaging provocations for the sector.
Murray Streets - *Director of Strategy,* Saatchi & Saatchi

11.00 **Morning break & refreshments**

11.30 **INTERNATIONAL INSIGHT: Addressing peak demand: the opportunities and risks for low income and vulnerable consumers**
- Background to the Australian electricity industry's approach to peak demand management including demand response
- Latest findings on the effects of peak demand management on low income and vulnerable consumers
- Recommendations for the government, retailers, and distributors on developing energy monitoring programmes with the consumer in mind

Dr. Lynne Chester - *Senior Lecturer,* University of Sydney
IN ASSOCIATION WITH PWC

12.00 **PANEL DISCUSSION: Panel reply: New Zealand's response to addressing energy hardship and peak demand**
- 25% put up with "unacceptably cold" homes in the past year as they struggle to pay bills
- 38% concerned about how they will pay for their heating bills
- Almost 75% believe energy costs are unreasonable and 69% say that firms should be nationalised.

These are results from a UK survey; how would New Zealand score? With increasing political focus on this issue, what is the New Zealand energy sector doing to address energy hardship?
- Objectives for the MDVC (Medically Dependent, Vulnerable Customer) and Vulnerable Customer Framework
- Relevant lessons from international markets such as the UK/Australia
- The main barriers to improving the situation in New Zealand
- Views on where the responsibility for action and decision making lies

Dr. Lynne Chester - *Senior Lecturer,* University of Sydney
Fiona Smith - *Customer Experience Manager,* Trustpower
Major Campbell Roberts - *National Director,* The Salvation Army
Gareth Wilson - *Manager,* MBIE
Raewyn Fox - *Chief Executive,*
The New Zealand Federation of Family Budgeting Services
Facilitator: Professor Philippa Howden-Chapman, *Director,* Sustainable Cities

12.50 **Lunch Break** SPONSORED BY LANDIS + GYR

1.50 **USER PROFILE: Large energy consumer**
Large industrial energy users will be more aware than most of energy sector issues and opportunities. These organisations implement company wide initiatives designed to better identify and implement energy-saving opportunities.
- Needs, concerns and perceptions as a large industrial energy user
- Overview and results from monitoring and reducing energy use
- The current energy strategy (electricity and gas) and related initiatives

Michelle Dawson - *Principal Corporate Sustainability Advisor,* Chief Sustainability Office, Auckland Council

2.15 **10-10-10: Innovation in optimising energy use**
This session will feature three short case studies on emerging technology designed to monitor and control energy (electricity and gas) use.
Scott Noyes - *Energy Management Specialist,* Schneider Electric
Peter Williams - *FBNZ Group Automation and Control Manager,* Fonterra
Jonathan Pooch - *Managing Director,* DETA Consulting

2.55 **FOUNDATION PARTNER ADDRESS: Demand response: Competition for load**
The results of the recent Transpower demand response trials are now known. Given that the value of demand response is becoming increasingly transparent to a number of industry participants including lines owners, generators and end users, what will this mean for the 'load market' going forward?
- The value of demand response to the different market participants
- The current level of competition in the demand response market
- Barriers to rolling out demand response offerings beyond large users
- Learnings from demand response trials around the country
- Understanding the impact of demand management on consumers, the environment and network management
- What does this mean for metering as we reach the 2015 deadline?

Siobhan Procter - *Strategy & Investment Manager,* Transpower

3.35 **Afternoon break & refreshments**

4.00 **Communities, consultation and consenting**
As the latest large scale generation project to be completed, the Mill Creek Wind Project has experienced a challenging journey to commissioning. Chris Jones, the Mill Creek Project Manager, will provide an insight into what was involved. Without doubt, conditions that result in a longer build or complex stakeholder requirements will increase the cost of a project, and ultimately the price of power generated. With little new large-scale generation planned in the immediate future, it is a good time to take stock of the current environment for developing a modern renewable energy project. A lull in activity may be the ideal time to reflect upon the need for practical outcomes from consent conditions.

- How difficult and complex has it been navigating the development, construction and commissioning pathways and what does this mean in terms of effects on project duration and cost?
- Is there an opportunity to work with Territorial Authorities to get better outcomes for all parties concerned?

Chris Jones - *Senior Project Manager,* Meridian Energy

4.40 **PANEL DISCUSSION: Lapsing consents and flattening demand**

- Update on consents that will be lapsing for major generation projects
- Will current market demand cause decreased generation capacity?
- What are the key concerns in determining required capacity for the coming years?
- Who will manage the retiring/mothballing of assets – government or industry?

Chris More - *Renewable Options Manager,* Meridian Energy
Peter Armstrong - *Electricity Planning Manager,* Powerco
Malcolm Alexander - *Chief Executive,* Local Government New Zealand
Stephen Jay - *General Manager Grid Development,* Transpower
Facilitator: Steve Wightman - *Managing Consultant,* PA Consulting Group

5.35 **Closing remarks from the MC**

5.45 **New Zealand Downstream Networking Drinks** SPONSORED BY ABB

7.00 **NEW ZEALAND DOWNSTREAM DINNER**

Gala Dinner

The Downstream 2015 Gala Dinner is a great opportunity for the industry to round off the first day. Take advantage of the informal atmosphere to share ideas, network and do business with your peers and clients whilst enjoying a lavish dinner and drinks reception.

KEYNOTE SPEAKER: Rob Waddell

Rob Waddell is best known as New Zealand's only Gold Medalist at the Sydney 2000 Olympic Games. Rob has been a key part of three America's Cup sailing teams, since 2002, culminating in the nail biting performance that Emirates Team NZ produced in the recent 2013 America's Cup in San Francisco. Rob is the current chef de mission, leading the NZ Olympic and Commonwealth Games teams and is responsible for setting standards of excellence, overseeing planning and preparation of games management teams and ensuring the athletes and their national sports organisations have what they need to achieve within the complex Games environments.

DAY TWO 5 MARCH 2015

8.00 **Registration and coffee**

9.00 **Welcome back from the Day Two MC**
John Hancock - *Director,* Signature Consulting

9.05 **Is utility convergence and increased share of wallet worth the journey?**
With the purchase of Energy Direct in July 2013, the launch of the new triple service offering (gas, electricity and telecom) in November 2013 and the re-entry into the metropolitan market in 2014, there has been a significant strategic change at Trustpower over the last few years. Chris O'Hara will provide some insight into these decisions and hopefully answer the question, what next?
Chris O'Hara - *General Manager Commercial Operations,* Trustpower
IN ASSOCIATION WITH STELLAR CONSULTING

9.45 **PANEL DISCUSSION: The changing retail market and leveling the playing field**
Increased competition and new market entrants characterise the energy retail sector currently. This panel discusses the changing retail environment and considers whether these trends will continue.

- Independent retailers' perspective on barriers to entry and competition levels
- Effects of a large number of retailers in the market on the industry and the consumer
- Handling regional issues such as rapid local industry growth
- Challenges for consumer engagement depending on scale
- The multi-fuel proposition

Alan MaCauley - *General Manager Retail,* Meridian Energy
Murray Dyer - *Commercial Director,* Simply Energy
Steve O'Connor - *Founder / CEO,* Flick Electric
David Goadby - *General Manager Retail,* Genesis Energy
Gary Holden - *Chief Executive,* Pulse Energy
Facilitator: Bill Heaps - *Director,* Strata Consulting

10.35 **Morning break & refreshments**



11.05 **Multi-utility investment challenges**
An update from the chairman of the country's largest utility. Vector is a company in the thick of some of the country's largest infrastructure challenges – Auckland infrastructure planning; The northern gas pipeline capacity; smart grids; and, fibre-to-the-home.
- The regulatory framework in New Zealand – becoming too cumbersome?
- Technology investment and how to manage the road to the smart grid
- Investment incentives - advantages offshore asset owners have and how material they are
- The northern gas pipeline– what would it take for Vector to build new capacity?

Michael Stiassny - *Chairman,* Vector

11.40 **PANEL DISCUSSION: Finding regulatory balance and efficiency**
With a separate economic and market regulator, how does the New Zealand regulatory environment stack up? The cost associated with regulating the sector is borne by all, so are we getting value for money. If there was ever a case for regulatory reform, who will advise whether we have the regulatory balance right?
- International and inter-sector comparisons
- The short-term priorities for industry regulation
- Industry performance on key priorities with regard to pricing, the consumer and competition
- The ability for a regulatory environment to lift productivity
- Areas of overlapping responsibility
- If reform is required, how do you assess whether there is a net benefit?
- How costly is regulatory risk and how do you minimize the effects?

Steve Bielby - *Chief Executive,* Gas Industry Company
Mark Berry - *Chairman,* Commerce Commission
Lew Evans - *Professor of Economics,* Victoria University
Brent Layton - *Chair,* Electricity Authority
Facilitator: John Hancock - *Director,* Signature Consulting

12.30 **Lunch break** SPONSORED BY PULSE

1.30 **Changing dynamics in the downstream gas market**
The downstream gas market today is experiencing change on a number of fronts, from large user to residential. Merger and acquisition activity, new entrants, technology options, and increased supply options make for an interesting landscape. We take a look at the overall landscape and highlight the key issues facing both gas and electricity retailers, users, and distributors.
Simon Coates - *Director,* Concept Consulting

2.10 **PANEL DISCUSSION: Gas smart metering: future opportunity**
Gas smart metering trials have been completed and the industry is contemplating the possibilities around gas tariff differentiation, improved customer service, remote meter reading, technology options and better credit management. There will be teething issues and some opportunities may not be as clear when compared to those for electricity metering, but what are the possibilities and what are the consequences for the customer? Why is the Commerce Commission taking an interest?
Stuart Dickson - *General Manager Gas,* Powerco
Rogan Clarke - *General Manager,* AMS
Craig Hackett - *New Business Manager,* Metrix
Facilitator: Jonathan Kay - *Director,* Lone Wolf Enterprises

3.00 **PRESENTATION: A city's changing energy profile: Auckland**
What are Auckland's current energy use profiles and emerging trends for both electricity and gas?
- Current energy usage patterns and emerging trends
- Energy options for new homes and businesses
- Consistency with Auckland Council's Energy Resilience and Low Carbon Action Plan
- Implications and unintended consequences of picking winners
- Future energy requirements and meeting future demand

Brenda Talacek - *Group Manager Commercial Relationships - Networks,* Vector

3.40 **Afternoon break & refreshments**

4.00 **PANEL DISCUSSION: Large energy user feedback**
The industry is frequently told times are changing and that we need to listen to our customers. Energy demand growth is flat, new technologies are becoming more prevalent, so what do large consumers want from their energy supplier? Four large energy consumers provide some feedback to the industry about their frustrations with and requirements from the sector.
Leon Jarden - *CODB Manager Finance,* Countdown
Linda Mulvihill - *Energy Manager,* Fonterra
Lyndon Haugh - *Energy Manager,* Carter Holt Harvey
Alan Eyes - *Energy Manager,* NZ Steel
Lisa Richardson - *Group Procurement Manager,* KiwiRail
Facilitator: John Carnegie - *Manager Energy, Environment & Infrastructure,* Business NZ

4.50 **20:20: Smart homes – the possibilities**
By supporting the technology and social changes we need to understand the best way a utility can structure prices and offer services (alongside others in the value chain from suppliers to EECA) to meet (enable) people's real energy needs. Their real energy need is not just kilowatts or who to call for faults. It is what they use energy for: health, comfort, social, material, value and environmental needs.
This may mean changes in the regulatory or business models. For instance, if we show we can offer people warmer, healthier homes for longer with lower bills with a different regulatory and business model, why would we not strive to deliver the political, regulatory and commercial environment to make that happen? Two of our largest energy companies update us on recent smart home trials.
- Opportunities to improve consumer choices with new technology and packages
- How consumer behaviour changes with these choices
- The benefits to consumers, distributors, transmission, retail and New Zealand

Jamie Silk - *Business and Research & Development Manager,* Powerco
Gareth Williams - *Manager Strategic Solutions,* Vector

5.30 **Closing remarks from the Facilitator and end of conference**

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DOWNSTREAM

The Energy Sector's Annual Strategic Forum 2015

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Downstream 2015 has some superb sponsorship and exhibition opportunities available. There are some high level ways to engage with the event, from major sponsorship, private breakfast briefings, or taking an exhibition booth space in the expo at the event. With a room full of New Zealand's key energy sector's decision-makers, this is an opportunity not to be missed. Contact Conferenz or Freeman Media to receive a prospectus:

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Gloria Yehia, Conferenz +64 9 912 2060 / email: gloria@conferenz.co.nz

Dominic Duncan, Conferenz +64 9 912 7633 / email: dominic@conferenz.co.nz

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Conference + Dinner	**$2160** + GST
Dinner only	**$210** + GST
Dinner - Table for 10	**$2100** + GST

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- 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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