

NEW ZEALAND
DOWNSTREAM
THE ENERGY SECTOR'S ANNUAL STRATEGIC FORUM 2014

5 & 6 March 2014, SKYCITY Convention Centre, Auckland

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Christoph Frei
World Energy Council



Carl Hansen
Electricity Authority



Ken Sutherland
Unison



Alison Andrew
Transpower



Sjoerd Post
Refining NZ



David Parker
Labour Party

Macro Gas Issues

New Retailers

Smart Meter Stocktake

Emerging International Trends

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2014

HIGHLIGHTS FOR 2014

Bringing the key strategic, commercial and stakeholder issues to the table

- Hear from the major political parties and industry in the debate on NZ Power
- The annual Leaders' Panel focus on the consumer
- Refining NZ CEO talks transport fuels and the next chapter for New Zealand
- Inaugural industry address from the new Transpower CEO
- Unlocking energy poverty – the role of the industry



ANNUAL NEW ZEALAND DOWNSTREAM DINNER

The Downstream Gala Dinner is a great opportunity for the industry to round off the first day and proved to be a great hit in 2013. 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.

International speed painter Brad Blaze will be joining us. Brad is the fastest portrait artist in the world and has enthralled audiences around the globe.



Register now at www.nzdownstream.co.nz

INTERNATIONAL KEYNOTE SPEAKER

SELECTION OF SPEAKERS & PANELISTS

Dr. Christoph Frei, Secretary General, World Energy Council



Dr. Christoph Frei became the fifth WEC Secretary General on 1 April 2009. Before that he worked at the World Economic Forum for many years following a distinguished academic career. Dr. Frei is also Professor of International Energy Policy and Strategy at the EPFL, Switzerland. WEC is the most encompassing industry organisation in the world, with Member Committees in nearly 100 countries, including most of the largest energy-producing and -consuming countries.



Alison Andrew
Transpower



Andrew Ott
PJM Interconnection



Babu Bahirathan
Nova Energy



Ian McChesney
Community Energy Action



David Parker
Labour Party



Fraser Jonker
Pioneer Generation



John Carnegie
BusinessNZ



John Hancock
Signature Consulting



James Whistler
EMS



John Small
Covec



Ken Sutherland
Unison



Lawrence Jones
Alstom Grid



Julian Elder
WEL Networks



Kay Saville-Smith
CRESA



Nick McDougall
OMV



Phillip Anderson
Devon Funds Management



Mike Underhill
EECA



Nicholas Robinson
Contact Energy



Russel Norman
Green Party



Simon Coates
Concept Consulting



Ralph Matthes
MEUG



Richard Fletcher
Powerco



Sue Chetwin
Consumer NZ



Mike Fuge
Genesis Energy



Sjoerd Post
Refining NZ



Steven Carden
Author of
NZ Unleashed



Carl Hansen
Electricity Authority



Vince Hawsworth
TrustPower



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DAY ONE 05 MARCH 2014

7.30 **Registration - Coffee & Tea - Exhibition opens**

8.30 **Conference opening**
Welcome from the Day One facilitator
John Small, *Director, Covec*

8.45 **Debate on NZ Power**

2014 is election year and time to think about whether the Labour-Green NZ Power proposal could work.

- Is the electricity market up for major reform again?
- What are the merits of the NZ Power proposal?
- Can we achieve the same desired outcome with a stronger focus on retail competition?

Russel Norman, Co-Leader, Green Party

David Parker, Deputy Leader, Labour Party

Vs.

Doug Heffernan, Chief Executive, Mighty River Power

Hon David Butcher, Manager, David Butcher and Associates

FACILITATOR: Bill Heaps, *Managing Director, Strata Energy Consulting*

In association with



9.35 **LEADERS' PANEL**

Meeting consumers' needs today and in the future

- Are transmission and distribution price hikes hurting the image of retailers?
- Future generation capacity and position
- What are we doing well and where do we need to improve?

Babu Bahirathan, Chief Executive Officer, Nova Energy

Sue Chetwin, Chief Executive, Consumer NZ

Ken Sutherland, Chief Executive, Unison

Mike Underhill, Chief Executive, EECA

Vince Hawksworth, Chief Executive, TrustPower

FACILITATOR: John Hancock, *Management Consultant - Utilities Industry, Signature Consulting*

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10.25 **MINISTERIAL ADDRESS**

Hon Steven Joyce, Minister of Economic Development

11.00 **Morning tea**

11.30 **Macros gas market issues**

Exploration effort in Taranaki continues to improve New Zealand's gas position as we transition into the post-Maui era. However, the 'shale gale' that is blowing through international oil and gas markets could have implications for New Zealand's future exploration activity, as could the fact that New Zealand's major swing consumer, Methanex, is operating at close to full capacity.

- International oil and gas market developments – shale & unconventional impacts, and LNG
- The outlook for the key swing consumer sectors – Methanex and power generation
- The outlook for industrial, commercial, and residential demand
- Exploration activity – in and out of Taranaki
- What this all may mean for New Zealand's future gas position

Simon Coates, Director, Concept Consulting

12.20 **INTERNATIONAL INSIGHT**

Emerging trends and market structures

- New developments and current trends in the US and other key global electricity markets
- What is working and what isn't? What does this mean for NZ?
- Market structures, hedging instruments and investor incentives

Lawrence Jones, Vice President, Utility Innovations & Infrastructure Resilience, Alstom Grid

Andrew Ott, Executive Vice President - Markets, PJM Interconnection

1.00 **Lunch**

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2.00 **Competition in the market? Small retailers profile 10-10-10**

A 10-minute introduction from three of the country's small electricity retailers. Each chief executive will have ten minutes to provide a quick profile of their operation and answer the following questions:

- Is there a platform for small retailers to grow and prosper in New Zealand?
- What are your key challenges in the next two years?
- What reforms would you suggest?

Gary Holden, Chief Executive Officer, Pulse Energy

Fraser Jonker, Chief Executive, Pioneer Generation

Simon Young, Director, Opunake Hydro

2.40 **PANEL DISCUSSION**

Declining power loads and the industrial outlook

With the exception of South Canterbury, major electricity demand around New Zealand is down and declining. Large tranches of load could drop off such as Tiwai Point and there are no plans for new energy-intensive industrial expansion.

- Major power loads – what's happening at the major pulp and paper mills
- The Tiwai factor
- Dairying expansion in South Canterbury and elsewhere
- New energy-intensive opportunities - data centres, fertiliser manufacture
- Large scale renewable biomass projects & geothermal

John Carnegie, Manager Energy, Environment & Infrastructure, BusinessNZ

Ewan Gebbie, Executive Officer, EMANZ

Andrew Tombs, Chief Executive, Alpine Energy

Mike Fuge, Chief Operating Officer, Genesis Energy

FACILITATOR: John Small, *Director, Covec*

DAY TWO 06 MARCH 2014

3.20 **Afternoon tea**

3.45 **KEYNOTE PRESENTATION**

Transport fuels in New Zealand – The next chapter

Fascinating changes are underway in the mid- and down-stream fuels market both in New Zealand and the Asia-Pacific region. Refineries are closing in Australia and traditional distribution models are being challenged.

- Infrastructure requirements
- Update on sector returns
- Geo-political influences and the current price of fuel in New Zealand
- Marsden Point – the next decade

Sjoerd Post, *Chief Executive Officer, Refining NZ*

4.25 **Building for the 21st Century: The challenge, the opportunity, the future**

Steven will look at what sort of society New Zealand will need to be to best tackle an unpredictable future. He will expose leading edge thinking on innovation, creativity and game-changing capabilities. Hear how companies look across sectors and at the fringes of their own industry to find out what they don't know. Explore how to operate by different rules in order to transform your organisation.

Steven Carden, *Author of NZ Unleashed*

5.10 **Close and networking drinks**

6.30 **NEW ZEALAND DOWNSTREAM DINNER**

Come and share in the gala dinner with your industry colleagues. Enjoy the food, wine, conversation and superb networking.

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8.55 **Welcome from the Day Two facilitator**

Jonathan Kay

9.05 **INTERNATIONAL KEYNOTE**

Christoph will provide a global energy perspective based on the 2013 Energy Trilemma Report, and World Energy Issues Monitor 2014. The release of the information the WEC has been working on with the BusinessNZ Energy Council on New Zealand's energy issues map will draw important linkages and lessons from the global to the local perspective.

Dr. Christoph Frei, *Secretary General, World Energy Council*

9.55 **PANEL DISCUSSION**

Energy poverty: Let's not wait

- Options for education in energy efficiency
- Fuel by fuel breakdown in terms of impact on poverty
- Overseas experience
- Actions the industry should take

Christoph Frei, *Secretary General, World Energy Council*

Ian McChesney, *Co-Founder, Community Energy Action*

Nick Robinson, *General Manager, Customer Insight, Marketing and Communications, Contact Energy*

Gareth Wilson, *Principal Advisor, Energy Markets Policy, MBIE*

FACILITATOR: **Kay Saville-Smith**, *Research Director, CRESA*

10.45 **Morning tea**

11.05 **FOUNDATION PARTNER ADDRESS**

Keeping the energy flowing - the new CEO's perspective

Alison Andrew, *Chief Executive, Transpower*

11.40 **Smart meter stocktake**

New Zealand's advanced meter story is now over six years old and we have some installed around the country. In some cases households will have already had at least one change in technology. Are features such as demand lopping and price signalling being used? Are we still way short on the sorts of plans that will entice residential consumers to change behaviour? This session provides a geospatial overview of smart meter deployments throughout New Zealand reviewing smart meter installations by:

- Ownership
- Geographic region
- Technology
- Functionality and solutions
- Domestic vs. industrial/commercial installations?

Rogan Clarke, *General Manager, AMS*



12.20 **FOUNDATION PARTNER ADDRESS**

Initiatives to enhance retail market competition

Carl will discuss the Authority's view about competition in the retail electricity market, looking at whether concerns about competition reflect poor perceptions or poor performance. The presentation will provide an overview of the initiatives the Authority has underway to address these issues.

Carl Hansen, Chief Executive, Electricity Authority

1.00 **Lunch**

1.50 **FOUNDATION PARTNER ADDRESS**

The next regulatory control period and work programme update

2014 will see preparations for the next price reset for electricity distribution businesses and also Transpower's transmission pricing reset. Hear from the regulator on preparations it has been making in this important area.

- Planned changes from the 2012 reset and learnings from various working groups
- Learnings from the first CPP with Orion and obligations around consumer consultation
- Impacts for gas distribution businesses around CPPs
- Overall work programme update for electricity and gas

Nick Russ, Chief Adviser - Regulation Branch, Commerce Commission

2.30 **PANEL REPLY**

To the Commerce Commission address

Julian Elder, former Chief Executive, WEL Networks

Richard Fletcher, Regulation and Government Relations General Manager, Powerco

John Hamill, General Manager - Regulations, ComCom

Ralph Matthes, Executive Director, MEUG

Nathan Strong, General Manager - Business Assurance, Unison Networks

FACILITATOR: Lynne Taylor, Director, PWC

3.10 **Afternoon tea**

3.35 **PANEL DISCUSSION**

Spot gas market: Importance of a wholesale gas market to the wider gas industry

Downstream 2014 will see a review of the new gas spot markets, and indeed whether we now actually have one or two markets. Discussion will include:

- Impact of new natural gas spot market(s) on:
 - Wholesale portfolio (price and volume) risk management
 - Downstream (retail) competition
- The role of regulatory oversight to support market reforms
- Where to next?
 - How do we further evolve and modernise the gas industry
 - Challenges facing further market enhancements
 - Insights from overseas gas markets
 - Role of a gas futures market

Steve Bielby, Chief Executive, GIC

Nick McDougall, Commercial Executive, OMV

James Whistler, Business Development Manager, EMS

FACILITATOR: Christine Southey, Consultant, Minter Ellison Rudd Watts

4.15 **Smart Grid Roadmap**

Toby will present the release of his Urban Development Smart Grid Roadmap. This report promises to lay down a recommendation for a national approach for the formation of a smart grid by a coalition of the willing. The project has been funded by APEC and EECA with a steering group of key stakeholders

Toby Stevenson, Director, Sapere

4.45 **Review of privatisation**

Dr Phillip Anderson will provide a professional investor review of the MRP and Meridian mixed ownership model outcomes.

Phillip Anderson, Equity Analyst, Devon Funds Management

5.10 **Conference close**

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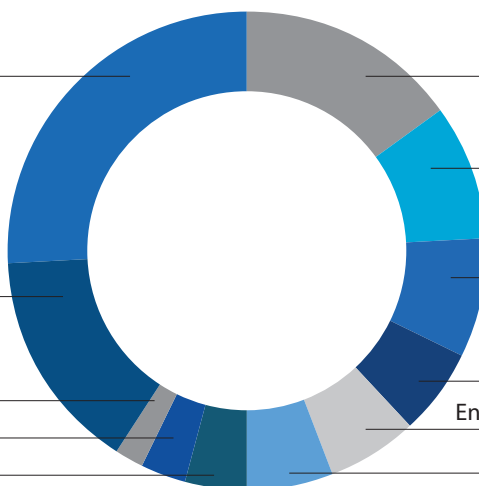
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Chief Executive | Managing Director

Chairman

Finance

Analyst



Energy Managers | Planning Managers
Commercial Management

Company Director

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Other

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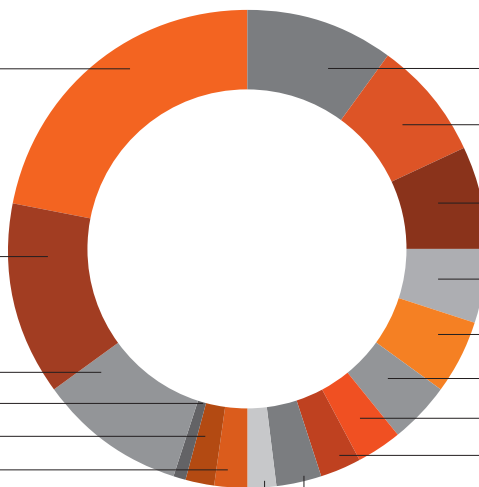
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*Data from 2013 event

LARGER EXHIBITION MORE SPONSORSHIP OPPORTUNITIES

Downstream 2014 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 of close to 300 energy executives, and most of New Zealand's key energy decision-makers, this is an event not to be missed.

This year's exhibition will feature a 2012 Tesla Roadster Electric Vehicle.

Make sure you contact Freeman Media or Conferenz to receive a prospectus to showcase your company's expertise at the top event in New Zealand for the leading energy executives.

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DELEGATE PRICING

Register & pay before 5pm 12 December 2013

Conference	\$1650 + GST per person
Conference + Dinner	\$1860 + GST per person

Register & pay after 5pm 12 December 2013

Conference	\$1850 + GST per person
Conference + Dinner	\$2060 + GST per person

Dinner only \$210 + GST per person

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