



Downstream\25

The Energy Sector's strategic forum

Delivering the lowest cost transition to customers

20-21 MARCH 2025
TE PAE, CHRISTCHURCH

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ENERGY NEWS
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 **Brightstar**

KEY THEMES AND FOCUS

- Leadership and strategic direction
- Government priorities and strategy
- Energy security and affordability
- Market function and competition
- Network and retail innovation
- Coordination and collaboration
- Energy consumer influence
- Renewable fuels and future energy mix
- Investment and investor insights
- Energy workforce - diversity, skills and talent
- Developing enabling regulation
- Sector trust and license to operate
- Energy innovator opportunities



WELCOME TO **DOWNSTREAM 25** IN CHRISTCHURCH

Downstream, New Zealand's leading conference for the energy sector is changing.

We've engaged widely across the industry to learn how we can develop the event further and adapt it to better support the sector to address the challenges ahead.

At a time when the energy industry is under great scrutiny, Downstream 2025 has been designed to deliver the strategic insights the sector needs to tackle the issues faced.

WHAT'S NEW?

In Christchurch and the South Island for the first time

A wider range of international experts sharing critical insights

Parallel sessions running across three presentation spaces

Showcase of energy innovators

New conference formats encouraging more interaction

Extended informal networking time

Re-imagined exhibition space with a dedicated presentation stage

Round table discussion time for tackling crucial sector issues



2025 SPEAKER LINE UP

INTERNATIONAL INSIGHTS



BRANDON KEEFFE
executive chairman & ceo
Plus Power (USA)



BRENDAN FRENCH
chief executive
Energy Consumers
Australia (AUS)



GAVIN STARKS
founder and ceo
Icebreaker One (UK)



DAVE SMITH
director and principal consultant
Creative Energy
Consulting (AUS)

LOCAL LEADERS



HUIA BURT
chief executive
Electric Kiwi



BABU BAHIRATHAN
chief executive officer
Nova Energy



WARUNA KARUNARATNE
investment director
New Zealand Green
Investment Finance



STEW HAMILTON
chief executive
Mercury



KENNIE TSUI
chief executive
New Zealand Geothermal
Association



PAULINE MARTIN
senior energy manager
Datagrid



HON SHANE JONES
*Minister for Resources
and Associate Minister
for Energy*



JEFF SCHLICHTING
*managing director
and co-founder*
Helios Energy



MALCOLM JOHNS
chief executive
Genesis



JAMES KILTY
chief executive
Powerco



MARGARET COONEY
chief operating officer
Octopus Energy



HON SIMEON BROWN
Minister for Energy

DAY 1 : 20 MARCH

7.30 Breakfast (by invitation only)

8.45 Mihi whakatau

8.50 Welcome from the day one chair

8.55 A “whole of system” approach **PRESENTATION**

The challenge of decarbonising New Zealand’s energy system is complex. Keeping the lights on, and the trilemma in balance while shifting to as highly renewable energy system will require unprecedented collaboration. Enabling policy and regulations are key to unlocking the investment and options required for a just and secure transition. So, how are we doing and what’s next for a “whole of system” approach?

9.20 International Keynote | Unlocking the value of energy data **INTERNATIONAL KEYNOTE**

Hear about how to unlock the value of data to help us modernise our energy systems and support delivering net zero, and what Icebreaker One has learned so far. You’ll leave with an understanding of how data can help accelerate new technologies to market, enable monitoring against science-based targets, and get more finance flowing towards net zero - and why secure, assurable and open approaches are essential to delivery.

Gavin Starks – founder and ceo, Icebreaker One

9.45 Ministerial address | Improving New Zealand’s energy security and affordability **MINISTERIAL ADDRESS**

Hon Simeon Brown – Minister for Energy

10.10 Powerco address **PRESENTATION**

Sponsored by  **POWERCO**

10.30 Morning break and networking in the exhibition space

11.00 Leaders’ Panel **PANEL**

Getting through the energy transition requires leadership, collaboration, and action. What do our leaders think needs to happen to address the urgent and longer-term challenges of the transition? What role can individual senior chief executives play in driving collaboration, and positive outcomes? And how can they contribute to building a diverse, inclusive, available, and motivated workforce continuum?

Capacity challenges | Collaboration | Generation and firming | Security and resilience | Talent attraction and retention

Malcolm Johns – chief executive, Genesis

Mike Fuge – chief executive, Contact

James Kilty – chief executive, Powerco

Margaret Cooney – chief operating officer, Octopus Energy

Facilitated by: **Jen Nolan** – director, At Large

STREAM 1 - RAKAIA

12.00 Electricity Authority Update **PRESENTATION**

STREAM 2 - CONWAYS

International insights | The rise of the energy consumer

PRESENTATION

Energy Consumers Australia is the independent, national voice for residential and small business energy consumers in Australia. What is the benefit of encouraging consumer involvement, and what does an equitable relationship look like between those that supply and those that consume? And following the New Zealand Consumer Advocacy Council closing as per Budget 2024, what should we be thinking about?

Brendan French – chief executive officer, Energy Consumers Australia

12.30 Lunch break and networking in the exhibition space

1.30 Postcard from the Future | Signals from the Australian Energy Market **PRESENTATION**

The Australian wholesale electricity market is based on the same design as New Zealand’s but is on a different trajectory towards a fully decarbonised grid. At times, Australia has an excess supply of renewables, which creates new challenges around grid stability.

On the other hand, New Zealand has recently faced challenges arising from a shortfall in renewable supply. Might the tables be turned in the future, with New Zealand experiencing the excess and Australia the shortfall? And can Australia and New Zealand learn from each other’s experiences, to better plan and operate our respective markets?

Dave Smith – director and principal consultant, Creative Energy Consulting


Navigating the Energy Landscape: Māori Leaders on Collaboration and Innovation **PRESENTATION**

Join us for an empowering session with Māori energy leaders, as they share their journeys navigating the energy sector.

Explore the motivations driving Māori investments in energy, and learn how Māori-led approaches create collaborative, sustainable, and impactful outcomes for iwi, hapū, and the wider community. This session will emphasise the vision of Māori as not only stakeholders but as central, active participants in shaping the energy landscape for future generations.

Manu Barrett – chief innovation officer and managing director, Solar Sense (Tainui, Ngāti Maniapoto, Kāi Tahu)

Matiu Taurau – chief executive officer, Tū Mai Rā (Rangitāne, Ngāi Tahu, Ngāpuhi, Ngāti Kahungunu)

2.00	Back to central planning for the transition? PANEL Australian state governments have essentially reverted to central planning for new, renewable generation investment - do we need to do the same in New Zealand? <ul style="list-style-type: none"> • Renewable Energy Zones (REZs) and supply contracts • Impacts of governments being in the market as a single buyer • Challenging the New Zealand electricity market (NZEM) Dave Smith – <i>director and principal consultant, Creative Energy Consulting</i> Jeff Schlichting – <i>managing director, co-founder, Helios Energy</i> John Clarke – <i>acting chief executive, Transpower</i> Facilitator: John Hancock – <i>independent consultant, Signature Consulting</i>	Empowering a new energy democracy PANEL The supply and consumption of electricity in Aotearoa is evolving. Access to information, technology, and falling costs are supporting non-traditional electricity supply for customers and communities alike. What is driving these changes, and how can we support best fit solutions across the motu? How can key stakeholders help to realise this new energy democracy? Brendan French – <i>chief executive, Energy Consumers Australia</i> Sam Elder – <i>general manager energy futures, Orion</i> Facilitator: Vic Crockford – <i>executive director, Heft Communications</i>
3.00	Afternoon break and networking in the exhibition space	
3.30	Insights The importance of Trust PRESENTATION Acumen Edelman's Trust Barometer looks at trust and credibility in the institutions of businesses, NGOs, media and government. It provides valuable insights on how to build trust and how Aotearoa New Zealand compares with other markets. While businesses are forging ahead with strategies centred around innovation and the benefits it will bring, many Kiwis aren't sharing the same level of enthusiasm. Bronwyn Millar – <i>director Wellington, Acumen</i>	Masterclass Social Licence to Operate MASTERCLASS <ul style="list-style-type: none"> • Community engagement • Iwi engagement • Research findings on the five key elements of building social licence • How to tell a compelling and collaborative story on the "why" of your project Jen Nolan – <i>director, At Large</i>
4.00	Panel A question of security X-FACTOR: PANEL With one pylon-led exception, we managed to get through winter 2024 while keeping the lights on, but the price paid was high. What could we have done better in 2024 and where do we stand for 2025 and beyond to deliver affordable, secure energy to the market? Tracey Hickman – <i>chief wholesale officer, Genesis</i> Ramu Naidoo – <i>market operations manager, Transpower</i> Phil Gibson – <i>executive gm portfolio, Mercury</i> Facilitator: John Kidd – <i>director, head of research, Enerlytica</i>	
4.55	Ministerial Address MINISTERIAL ADDRESS Hon Shane Jones – <i>Minister for Resources, and Associate Minister for Energy</i>	
5.15	Reflections from day one	
5.30	Extended networking with refreshments and catering	
		Sponsored by  TRANSPOWER

DAY 2 : 21 MARCH

7.30	Breakfast (by invitation only)
8.30	Welcome from the day two chair
8.35	Quiz recap of day one QUIZ
8.40	International insights PRESENTATION
9.10	International insights Network innovation PRESENTATION Network businesses play an important role in the supply and management of electricity. Optimising existing assets and infrastructure and introducing novel solutions has the potential to save both time and money, ultimately delivering savings to customers. This presentation will cover some exciting innovations in Australia aimed at better managing demand and utilise network assets better.
9.40	Leveraging assets and blurring the lines PANEL The coordination and cooperation of generators, distributors and retailers has the potential to reduce the overall cost of the energy transition, through the efficient use of existing assets and those projected to enter the market. So what have we learned to date through the trials and work already completed, what is underway and what is required to unlock the full potential of flexibility and cooperation. Evie Trolove – <i>head of market and customer innovation, Orion</i> Andy Cooper – <i>chief customer officer, Electric Kiwi</i> Marcos Pelenur – <i>chief executive, EECA</i>
10.30	Morning break and networking in the exhibition space

STREAM 1 - RAKAIA		STREAM 2 - CONWAYS	
11.00	Big Batteries The lowest cost, near term, climate & reliability option PRESENTATION Battery energy storage is suddenly the nearest-term and flexible solution to manage this transition while maintaining rigorous climate protection goals and controlling costs to ratepayers. Keefe will outline the successful market designs and uses that have incentivised his firm to build extensive fleets of privately invested batteries in the U.S and Canada that are successfully replacing gas and coal plant retirements with grid operator and utility admiration. Brandon Keefe – executive chairman & ceo, Plus Power	Delivering the energy workforce required PRESENTATION Research to date has identified the opportunities and benefits of a more diverse energy sector workforce. The time has come for a bold intervention to reset the playing field and invest in a new pipeline for the roles that exist today and those we can only imagine in the future. Representative from the Diversity, Equity and Belonging's Working Group	
11.30	Round tables – Plenary ROUNDTABLES Break off to multiple tables running individual discussions. Current topics include: <ul style="list-style-type: none"> • Industrial demand side management • BESS deployment • Workforce skilling • EV demand response • Managing resilience • Social license • Energy intersections 	Future energy mix 1 Hydrogen PRESENTATION Clean hydrogen demand is projected to increase significantly by 2050 and could account for up to 73% of total Hydrogen demand. What's behind the scenarios delivering these projections and what is the “real” story about clean Hydrogen. This session will review the global Hydrogen situation and opportunities for Aotearoa. Dr Linda Wright – chief executive, New Zealand Hydrogen Council Future Energy Mix Geothermal resource: From low temperature to superhot PRESENTATION At one end of the spectrum new supercritical or “superhot” geothermal energy technology has significant potential to provide baseload energy for Aotearoa. At the other end, relatively lower temperature geothermal direct heat can drive commercial heat pumps and other industrial processes efficiently and economically. Kennie Tsui – chief executive, New Zealand Geothermal Association Energy mix Black wood pellets PRESENTATION In February 2023 Genesis successfully completed a biomass burn trial at Huntly Power Station. Now with increasing gas supply uncertainty, new political focus, and a growing coalition of the willing, what's the potential for an indigenous black wood pellet industry to displace thermal coal? Update in conjunction with Genesis Energy.	
12.30	Lunch break and networking in the exhibition space		
1.30	Investor insights PANEL It is essential that we encourage more and faster investment in the energy system to allow us to build a productive economy on the back of affordable and secure energy. What is making New Zealand attractive to investment currently, and what are the levers we have to incentivise further investment faster? <ul style="list-style-type: none"> • Encouraging more and faster investment • Geo-political considerations • Navigating and managing risk • FID hurdles including the use of PPAs • Exploring investor priorities Waruna Karunaratne – investment director, New Zealand Green Investment Finance	Prospects for large scale energy users PANEL If energy is one of or the most expensive costs associated with the production of your product, or the delivery of your service, then managing that cost and securing availability becomes paramount. <ul style="list-style-type: none"> • Who's role is it to ensure that energy costs are fair and reasonable, and that supply is secure? • For those working to decarbonise, what are the options? • How can we rework the challenge to take advantage of lower cost intermittent generation when it is available? • And how does the use of renewable energy sources by an organisation enhance its global competitiveness? Linda Mulvihill – general manager of energy & climate, Fonterra Darren Gilchrist – energy manager, Oji Fibre Solutions Pauline Martin – senior energy manager, Datagrid New Zealand Stew Hamilton – chief executive, Mercury	
2.30	Prize draws		
2.40	Is the market working? PANEL The extreme pricing volatility experienced over winter 2024 led to the closure of several large industrials. A swift response from the Government saw the establishment of the Energy Competition Task Force, tasked with improving resilience and creating downward pressure on prices by encouraging more and faster generation investment. The ability to draw on large scale demand-response and a relatively mild winter kept things in balance, given the shortage of thermal fuel in 2024, but the market reacted and arguably took its toll. What did we learn from this experience and is the market delivering the outcomes we want or just working as expected? Huia Burt – chief executive, Electric Kiwi Babu Bahirathan – chief executive officer, Nova Energy Dr John Small – chair, Commerce Commission Facilitated by: Toby Stevenson – consulting director, Sapere Research Group		
3.30	Closing activity		
3.40	End of the conference		

OPEN STAGE & ENERGY INNOVATOR SHOWCASES

To add to the already rich mix of content, within the re-imagined exhibition space Downstream 2025 will feature a new presentation stage.

This will be home to the Energy Innovator Showcases – a platform for leading energy solution providers and emerging companies to showcase a range of innovations, products and services. These sessions will provide an important additional resource to enhance information exchange and delegate engagement.

SPONSORSHIP & EXHIBITION OPPORTUNITIES

Downstream 2025 will host over 450 energy sector leaders, decision makers and influencers from across Aotearoa. Secure your sponsorship property as soon as you can to access and engage the Downstream audience. To learn about audience engagement and event support options for 2025 please contact either

James Wardhaugh, james.wardhaugh@freemanmedia.co.nz
OR Dominic Duncan, dominidc@brightstar.co.nz to learn more.

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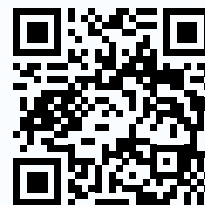


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Agenda Updates: IEC Ltd reserves the right to make any amendments deemed to be in the best interest of the conference. Agenda is correct at time of printing, please check online for any updates. Please see website for full details and cancellation policy.

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WHAT HAPPENS IF I HAVE TO CANCEL?

YOU HAVE SEVERAL OPTIONS:

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



One New Zealand native tree will be planted for every speaker registered via Trees That Count

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