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SMARTENERGY SUMMIT:
PARKS ASSOCIATES ENGAGING THE CONSUMER

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JANUARY 24-26, 2011

RESEARCH AGENDA WORKSHOP NEWSROOM SPONSORS

AGENDA

The Agenda for the **Smart Energy Summit** features panels from experts in energy management, with discussion on current technologies and consumer research.

Speakers examine the current status of Smart Grids for different regions in the U.S. and around the world while equipment makers and service providers discuss the opportunities and pitfalls of integrating with Smart Grids and providing new benefits to consumers from cloud services and in-home control products.

MONDAY, JAN 24

12:30 pm **Registration Desk Opens**

1:00–5:15 pm **Smart Energy Workshop**
Energy: Consumer Demand and New Business Models
Hosted by Parks Associates



This interactive workshop blends expert analysis of the residential energy management ecosystem with time-series consumer data from Parks Associates' ongoing **Residential Energy Management** project to provide detailed forecasts, review of market opportunities, and the requirements for successful business strategies.

5:30 pm **Networking Reception**

TUESDAY, JAN 25

7:30 am **Registration Open and Breakfast**

8:45 am **Setting the Stage: 2011 Landscape for Energy Management Solutions**

Bill Ablondi, who has led Parks Associates' Residential Energy Management project since its inception, discusses the current consumer climate regarding acceptance of energy management solutions. This presentation features consumer survey data and analysis of the market forces shaping the landscape for energy management systems and services, with an assessment of several major market opportunities.

SPEAKER

Bill Ablondi, Director of Home Systems Research, **Parks Associates**

9:30 am **Opening Keynote - A View into the Future: Customer Driven Smart Grids**



Andres Carvallo

Executive Vice President and Chief Strategy Officer

Grid Net

A View into the Future: Customer Driven Smart Grids

Mr. Carvallo will explore how in the coming years the electric industry will evolve dramatically in how it makes infrastructure investments and what products and services it will offer. Historically, electric utilities had been extending already existing grid networks and offering services with very little variation to the infrastructure needed, to the business model and to the customer offerings. He will share his vision of what will happen as grid optimization becomes center to the Smart Grid investments driven by the proliferation of electric vehicles, distributed generation (e.g., solar PV), and distributed energy storage. We will see a re-design of the grid networks, the business models, and the customer offerings. Terms like Islanding, De-coupling, V2G, B2G, H2G, Dynamic Modulation, Predictive Volt/VAR, Demand Action, Predictive FDIR, and Advanced Power FACTOR will become more and more popular.

10:30 am **Break in Showcase**

- 11:00 am Smart Grid Deployments: Balancing Benefits and Costs**
- Building out a smart grid requires immense capital and resources, but utilities risk losing those expenditures without careful consideration of consumer attitudes and possible inhibitors to adoption. For example, 20% of U.S. consumers are very willing to pay for an energy monitoring service, but over 40% do not like the idea of utility control in their home. This panel features executive presentations on the challenge of crafting business strategies and deployment plans that account for all factors that can help or hinder deployment of a smart grid.
- SPEAKERS**
John Heflin Baker, Jr., Chief Strategy Officer, **Austin Energy**
Brian Dawson, CEO, **Calico Energy**
Sheri Givens, Public Counsel, **Texas Office of Public Utility Counsel**
- MODERATOR**
Bill Ablondi, Director of Home Systems Research, **Parks Associates**
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- 11:45 am Solutions that Deliver on the Promise**
- Successful business models for residential energy management have to come from an understanding of the balance between consumer motivations and their willingness to spend. While consumers show high interest in cost savings, they likewise demand demonstrable benefits before offering their full-fledged support for a solution. This panel features utilities, manufacturers, and installers discussing the challenges of communicating benefits to consumers and the barriers that must be overcome on the path to mass-market acceptance.
- SPEAKERS**
Gavin Cato, Director of Strategic Alliances, **Elster Solutions**
John LaCour, COO, **DMN3**
Stuart Lombard, President and CEO, **ecobee**
Bill Muston, Manager, Research & Development, **Oncor Electric Delivery Company LLC**
Steve Widergren, Principal Engineer, **Pacific Northwest National Laboratory**
- MODERATOR**
Stuart Sikes, President, **Parks Associates**
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- 12:45 pm Networking Lunch**
- Sponsored by the Z-Wave Alliance**
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- 2:00 pm Perspectives on Europe and Asia**
- The implementation of smart grids around the globe has increased exponentially over the past several years. Deployments in many countries are well ahead of the U.S. and could provide valuable lessons to utilities, solution providers, and government entities. Although cultural, regulatory, and industrial particulars for each market vary widely, experiences of the various participants in Europe and Asia can help guide those seeking success in the U.S. This panel examines the unique factors driving adoption of smart grid infrastructures in Europe and Asia, including the activities of utilities and their partners, what lessons can be exported, and the different definitions of success.
- SPEAKERS**
Colin Calder, CEO, **PassivSystems**
Greg Memo, CEO, **GreenWave Reality**
- MODERATOR**
Farhan Abid, Research Analyst, **Parks Associates**
-
- 3:00 pm Break in Showcase**
- Sponsored by Motorola's 4Home Solution**
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- 3:30 pm Cloud-based Energy Management for Consumers**
- Smart grid technology developers are turning to the cloud to deliver energy management services. The cloud computing market is expected to grow significantly in the coming years and offers both compelling benefits and new challenges. This panel session brings together current participants, technology enablers, and those with a keen eye on the opportunity for delivering energy management solutions through the cloud. Discussions focus on the opportunities, business models, keys to engaging the consumer, and the challenges to overcome.
- SPEAKERS**
David Bercovich, Vice President, Business Development, **AlertMe**
Vince Groff, Executive Director, **Cox**
Jerry Kurtze, Senior Manager of Marketing & Business Development, **Motorola Mobility**
Roy Perry, Director, Strategic Assessment, **CableLabs**
Eric Saltzman, COO, **EcoFactor, Inc.**
- MODERATOR**

Bill Ablondi, Director of Home Systems Research, **Parks Associates**

4:30 pm

Energy as a Service

Electricity is a commodity and a valuable one, but regulatory changes and technology advancements are introducing a new dimension into this business: competition. The proliferation of broadband allows a variety of players to offer value-added services beyond their current commodity offerings. For example, electricity providers can now offer energy monitoring and management services along with electric power. This panel features presentations from a variety of different service firms – from telcos and MSOs to security companies and retail electricity providers – about opportunities they see in residential energy management.

SPEAKERS

Eric Bruno, Senior Vice President, Consumer Product Management & Development, **Verizon**

Scott Burns, Manager, Smart Energy Product Management, **Reliant Energy**

Christopher Deutschen, Senior Manager, **Direct Energy**

David Hennekes, Vice President, Residential Markets, **TXU Energy**

Andrew Tang, Senior Director, Integrated Demand Side Management - Products, **Pacific Gas and Electric Company**

MODERATOR

Farhan Abid, Research Analyst, **Parks Associates**

5:45 pm

Networking Reception

Network and view the latest innovations in the Showcase.

7:30 pm

A Lone Star Dinner

Join Parks Associates for a barbecue feast as only Texas can offer

WEDNESDAY, JAN 26

7:30 am

Continental Breakfast & Registration

8:30 am

Welcome & Opening Remarks: Opportunities Ahead of the HAN

Parks Associates provides an analysis of energy management opportunities for manufacturers, service providers, and utilities based on extensive consumer research and assessments of innovative solutions being introduced into the market.

SPEAKER

Bill Ablondi, Director of Home Systems Research, **Parks Associates**

9:00 am

Opening Keynote - Engaging the Consumer - How to make Smart Grids "Participatory"



Ron Ambrosio

Senior Technical Staff Member, **IBM Global Research Executive, Energy & Utilities Industry**

Chairman, **U.S. Dept. of Energy GridWise Architecture Council**

Chairman, **U.S. National Inst. of Standards and Tech. SGIP Smart Grid Architecture Committee**

Convenor, **ISO/IEC JTC 1 Special Working Group on Smart Grid**

Engaging the Consumer - How to make Smart Grids "Participatory"

One of the great challenges in smart grids has been to describe and quantify the consumer value proposition. It seems intuitive that a "smarter grid" should be better, but intuition doesn't always make for good business decisions. IBM surveys conducted around the world indicate there is high-value placed by consumer on being involved in their energy management, rather than having decisions made for them - they want to be a participant in the process. The broad range of technologies that fall within the smart grid scope, including end to end communication, advanced metering, home area networks and many others give us the tools needed to enable a participatory grid. This discussion will present some of the survey results above, review lessons learned from important pilot projects, and present thoughts on how we should be approaching the design of a participatory grid for the residential consumer, including the use of social computing technologies and the potential to unlock the consumer's personal motivations.

10:00 am

Partners in Progress: The Ecosystem Continues to Grow

The electric utility industry, traditionally a one-dimensional business responsible for delivering power to consumers, is transitioning into a dynamic mode of operation. Numerous industries, sparked by consumer interest, new technologies, and government funding, are leveraging AMI and broadband deployments to develop new energy management products, services, standards, and business models. These presentations address key areas of growth, areas for new partnerships, and strategic plans to further ignite consumer demand and accelerate adoption.

SPEAKERS

Greg Ennis, Technical Director, **Wi-Fi Alliance**

Randy Kauffman, President, **NextEnergy**
Rob Ranck, President, **HomePlug Powerline Alliance**

MODERATOR

Farhan Abid, Research Analyst, **Parks Associates**

11:00 am

Break in Showcase

11:30 am

Perspectives from the Ecosystem

The ecosystem for residential energy management systems and services continues to expand, encompassing retailers, ISPs, manufacturers, and installers along with utilities, but at its core, the consumer is still king. The energy industry will not realize the full benefits of the smart grid without engaging consumers, whose attitudes and demands will largely determine the parameters of successful business models. This interactive panel explores the role of different players in providing mass-market solutions that generate viable long-term businesses.

SPEAKERS

Kris Bowring, Sr. Director, Emerging Business, **Best Buy**
Al Choperena, President, **SimpleHomeNet, Inc.**
Mark Komanecky, Vice President of Sales & Marketing, **Eragy**
Ivan O'Neill, Strategic Alliance Manager, **Southern California Edison**
Steve Samolinski, Director of Solution Management for Connected Home Solutions, **Ingersoll Rand**

MODERATOR

Stuart Sikes, President, **Parks Associates**

12:30 pm

Lunch and Keynote - How will Consumers Benefit from the Smart Grid?



George W. Arnold, Eng.Sc.D.

National Coordinator for Smart Grid Interoperability, National Institute of Standards and Technology
U.S. Department of Commerce

How will consumers benefit from the smart grid?

Modernizing the electric grid to provide clean and reliable power for the 21st century is a key national priority and the focus of significant private and public investment. While many people think of the smart grid as synonymous with smart meters, there is much more to it. Many of the improvements being made to the grid are "behind the scenes" and less physically visible to consumers - but nevertheless deliver benefits that consumers will see in the form of reduced costs, fewer outages, and more secure energy supply.

1:45 pm

Opportunities beyond the HAN

Much of the discussion about the impact of smart grids on the residential market focuses on the home area network, but new technologies are creating opportunities for an array of new products and businesses. This session features manufacturers who are deploying advanced products and creating new business strategies for smart appliances, electric vehicles, and more.

SPEAKERS

Utz Baldwin, CEO, **CEDIA**
Andy Melder, Powerline Marketing, **Broadcom**
JT Thompson, Utility Sales Leader, **GE Appliances and Lighting**

MODERATOR

Farhan Abid, Research Analyst, **Parks Associates**

2:45 pm

Gateways into the Home

Companies looking to offer end-to-end energy management solutions have a variety of options for reaching systems on the HAN. Traditionally, the utility meter has had the role of "energy gateway" to the home, but new devices are emerging that expand the market vision of the HAN to a network encompassing all systems and devices in the home. The home gateway thus becomes critical to creating whole-home residential energy management solutions. This interactive session addresses gateway options for the home, the different efforts in developing control standards for end-to-end networking, and analysis of the potential benefits to the consumer and the industry.

SPEAKERS

Chano Gomez, Director of Business Development, **Lantiq North America, Inc.** representing **HomeGrid Forum**
Bill Scheffler, Senior Director of North American Business Development, **Z-Wave Alliance**
Kenneth Wacks, Member, GridWise Architecture Council, **U.S. Department of Energy**
David Waskevich, Market Development Engineer, **STMicroelectronics, Inc.**

John Weil, Global Product & Enablement Manager, **Freescale Semiconductor** *representing IPSO Alliance*

MODERATOR

Bill Ablondi, Director of Home Systems Research, **Parks Associates**

3:45 pm

SPECIAL SESSION: Smart Energy Summit Roundtable Wrap Up

Join Parks Associates' analysts and selected conference participants to discuss their perspectives on key takeaways from **Smart Energy Summit**. The three-day conference features more than 50 speakers sharing their views on a variety of topics ranging from smart grid deployments to energy as a service, not just a commodity, to opportunities beyond energy management control systems. This session provides attendees the opportunity to explore questions raised during the Summit and assess the implications for their businesses while setting the stage for a final round of networking.

www.smartenergysummit2011.com

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