



KEMA's 22nd Executive Forum

Retail Resurgence



Program

April 7-8, 2011
JW Marriott Resort
San Antonio, Texas

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April 6, 2011

Welcome to KEMA's 22nd Executive Forum, and thank you for your attendance.

Retail competition has come a long way since the markets began to open 15 years ago. Today, customers in more than 20 states plus the District of Columbia have access to some form of retail electricity choice. Customers in these states have seen a proliferation of choices, and many are seeing lower bills, enhanced customer service and new products and services emerge as a direct consequence of competitive forces. Our research shows this to be one of the largest growth periods – competitive retail power sales grew 19% in 2010, and are poised to make another significant leap in 2011, all positive signs.

Even as we make progress in competitive markets, challenges remain in advancing the reach of retail energy competition. A handful of states where choice is currently available have laws that limit competition, while states that have not yet chosen a path at all likely will remain outside of the retail competition landscape for quite some time. This calls for action on the policy front, as well as for the industry to more effectively convey a value proposition beyond "saving money."

As the resurgence of competition unfolds, it is time for this industry to accelerate the development of expanded offerings to include demand response, energy efficiency, carbon reduction and other service differentiators. Not only do these, and other innovative offerings advance the goal of reaching more customers, but they also serve as a foil against the anti-competition forces eager to roll back the success of competition. Indeed, quoting from last year's "chairman" letter: "The momentum is favorable, but success still remains contingent on wholesale price levels more than the innovation and efforts of the retail energy industry." We do not know when or if commodity prices will surge, but we can certainly use the time available in the interim to continue building a sustainable business model.

As we debate and discuss these and other issues over the next two days, I look forward to active and open engagement. We have prepared many formal opportunities to exchange important perspectives with panelists, but recognize that much of the "real" work over the next two days will happen informally during the provided networking opportunities.

If there is anything I or the KEMA team can do to make you comfortable, please let us know. In the interim, I hope you enjoy the Forum and your time in San Antonio!

Regards,

A handwritten signature in black ink, appearing to read "Hugo van Nispen". The signature is written in a cursive, somewhat stylized font and is positioned above a horizontal line.

Hugo van Nispen
Chairman, Executive Forum
Managing Director – KEMA Americas

Agenda

Wednesday, April 6, 2011

7:00 p.m. Opening Reception

Thursday, April 7, 2011

7:30 a.m. Continental Breakfast

8:30 a.m. Welcome Keynote: The Promise and Potential of Retail Markets

Mayo Shattuck, Chairman, President & CEO, Constellation Energy

Introduction: **Hugo van Nispen**, President & Managing Director, Americas, KEMA

9:15 a.m. Next Steps: Moving Towards Effective Market Design

John Anderson, President & CEO, ELCON

David Fein, VP, Energy Policy & Director, Retail Energy Policy, Constellation Energy; President, RESA

John Shelk, President & CEO, EPSA

Kurt Yeager, Executive Director, Galvin Electricity Initiative

Moderator: **Young Kim**, Associate Director, Retail Markets, KEMA

10:30 a.m. Break

11:00 a.m. Policymaker Priorities & Perspectives

Maureen O. Helmer, Partner, Hiscock & Barclay, LLP, and former Chair, New York PSC

Hon. Robert Powelson, Chairman, Pennsylvania PUC

Hon. Barry Smitherman, Chairman, Public Utility Commission of Texas

Moderator: **Martin Rosenberg**, Editor-in-Chief, EnergyBiz Magazine

12:30 p.m. Lunch Keynote

Hon. Federico Peña, Co-Chairman, COMPETE Coalition, and Senior Advisor, Vestar Capital Partners

Introduction: **Hugo van Nispen**, President & Managing Director, KEMA

1:30 p.m. The Customer Voice: Experiences & Expectations

Mitch Gutell, Energy Manager, Panda Restaurant Group

Chris Hendrix, Director, Markets & Compliance, Wal-Mart Stores, Inc.

Paul Smolen, President, Texas Electricity Professionals Association

Moderator: **Steve Kiesner**, Director, National Customer Markets, Edison Electric Institute

2:30 p.m. Growth & Innovation in C&I Markets

Tony Banks, VP, Competitive Market Policies, FirstEnergy Solutions

Cody Moore, Head of North American Power, EDF Trading

Steven J. Strobel, Executive VP & CFO, BlueStar Energy Services

James Connolly, Director of Origination, Hess Corporation

Moderator: **Tom Tiernan**, Senior Editor, Platts

3:45 p.m. Break



Agenda



Thursday, April 7, 2011 (cont.)

- 4:00 p.m. Wholesale Markets: Prices, Policies & Prospects
Vikas Dwivedi, Founder, BTU Capital
Ben Preston, Senior Managing Director, Macquarie Energy LLC
Brandon Schwertner, Managing Partner, Sumer Capital Partners
Dan Verbanac, President, Integrys Energy Services
Moderator: **Deryl Brown**, SVP, Hudson Energy
- 5:30 p.m. Adjourn
- 6:30 p.m. Executive Forum Reception
- 7:30 p.m. Executive Forum Dinner
Opening Remarks: **Pier Nabuurs**, Executive Board Chairman, KEMA
Special Address: **Hon. Barry Smitherman**, Chairman, PUC of Texas
Introduction: **David Fein**, VP, Energy Policy & Director, Retail Energy Policy, Constellation Energy; President, RESA

Friday, April 8, 2011

- 7:30 a.m. Continental Breakfast
- 8:30 a.m. New Technologies, New Markets
Tim Healy, Chairman & CEO, EnerNOC
Glen Stancil, VP of Electric Vehicle Services, NRG Energy, Inc.
Adrian Tuck, CEO, Tendril Networks, Inc.
R. Blake Young, President & CEO, Comverge
Moderator: **Kevin Sullivan**, Americas Regional Director, Management & Operations Consulting, KEMA
- 9:30 a.m. Growth & Innovation in the Mass Market
Kerry Breitbart, President & Co-Founder, North American Power
Kevin Kleinschmidt, President & COO, Energy Plus
Rob Snyder, Chairman & Co-Founder, Stream Energy
Marcie Zlotnik, Chairman & Co-Founder, StarTex Power
Moderator: **Paul Ring**, Publisher, EnergyChoiceMatters.com
- 10:45 a.m. Break
- 11:15 a.m. The Big 4
Cory Byzewski, VP & General Manager, U.S. North Residential, Direct Energy
Tom Gros, SVP, Sales, Reliant Energy
Michael Kagan, Chief Sales Officer, Constellation Energy
Nancy Perry, SVP, Residential & Business, TXU Energy
Moderator: **Hugo van Nispen**, President & Managing Director, Americas, KEMA
- 12:30 p.m. Lunch
- 1:30 p.m. Adjourn
- 2:30 p.m. Post-event golf

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