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2014 AUSTIN TX

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Welcome to AUSTIN

SMARTENERGYSUMMIT

ENGAGING THE CONSUMER

Thank you for your support of the fifth-annual **Smart Energy Summit: Engaging the Consumer.**

Every year, Smart Energy Summit hosts leaders from utilities, telecom, cable operators, security service providers, software, retail, government, and appliance manufacturers to network, exchange ideas, and examine innovative ways to engage consumers in energy solutions.

The consumer continues to be the core focus of the event. The lack of consumer engagement is often cited as a primary barrier to success in the home energy management space, generally attributed to a mix of apathy and lack of awareness. Our research confirms the segment of highly engaged consumers is small—but that there is growing interest and awareness in energy services among the mass market.

In general, 40%-60% of U.S. broadband households are willing to participate in demand-response programs, depending on the incentive offered. The most successful incentive is the most immediate and straightforward, with the households receiving $5 for each day the thermostat is adjusted.

Smart Energy Summit addresses the key issues for energy services for consumers, including the role of connected devices and the impact of the smart home and the Internet of Things as key factors in growing consumer interest and revenue opportunities.

Our event is successful as a result of the continued support of our 2014 Sponsors:

Dinner:	Speed Wire
Registration:	Percepscion
Event:	Alarm.com, Earth Networks – WeatherBug, ecobee, EcoFactor, Lowe's, Opower, People Power, PlanetEcosystems, Qualcomm, Technicolor, Z-Wave
Break:	AlertMe, Schneider Electric, Tendril

We hope that you find Smart Energy Summit: Engaging the Consumer valuable and informative and look forward to your feedback.

Sincerely,

Tricia Parks
CEO
Parks Associates

Stuart Sikes
President
Parks Associates

Tom Kerber
Director, Research, Home Controls & Energy
Parks Associates

Hosted By

PARKS ASSOCIATES

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The Premier Connected Home Conference
May 13-15, 2014,
San Francisco, CA

Connected Health Summit: Engaging the Consumer
September 4-5, 2014,
San Diego, CA

CONNECTIONS™ Europe
November 18-19, 2014, Amsterdam, The Netherlands

WELCOME

Erik Charlton
Vice President
of Business

From Push to Pull: How Nest is Redefining Energy Services
TUES, FEB 18, 12:15 PM

For decades, utilities have worked hard to build an image of safety and reliability. How do they reposition themselves as innovative energy partners? Erik will share how Nest is working with energy companies across the country to help customers save while staying comfortable. He'll also share how Nest has managed to upend the traditional thermostat business model through design, service and connectivity.

Bill Horrocks
VP, Product
Management,
Xfinity Home

Connected Homes Power Energy Management
WED, FEB 19, 12:15 PM

Service providers are offering a range of connected home solutions across the country. Comcast is one the largest connected home platforms in the world. Energy-related solutions are a key component to the strategy and shown to drive significant customer value. Scale, breadth of devices and data analytics can lead to innovative energy offerings that drive customer engagement through personalization, savings and ease of use.

Debbie Kimberly
VP of Distributed
Energy Services

Leveraging New Approaches and New Technology in Addressing Utility Challenges
TUES, FEB 18, 10:00 AM

A Residential Demand Response V2.0 is emerging—utilizing the customer's own energy management devices to delay the need for new power generation in Texas. This transformative residential thermostat program puts the choice in customer's hands. This model drives manufacturers and web hosts to develop and market features and functionality customers want while also using open standards and protocols that enable the utility to leverage the devices in DR initiatives. This keynote addresses new approaches to providing functionality and options for consumers, including current success and future opportunities regarding Austin Energy's Power Partner Thermostat Program.

Stuart Lombard
President
& CEO

The API Economy: The Impact to Consumers and Energy Management
WED, FEB 19, 9:45 AM

How do we accelerate the connection to the Internet of Things? Stuart Lombard, CEO of ecobee, believes the answer is simple: embracing partners and the Open API model. During the keynote, Stuart will explain how an open API model will eliminate obstacles and reduce friction for revolutionary new energy management models. He'll share how ecobee embraced the API economy to do things that wouldn't have otherwise been possible, like integrating with energy companies such as AutoGrid, Earth Networks, and Integral Analytics, and working with innovative smart home solutions like SmartThings and Control4. Stuart will illustrate how the open API economy opens doors to remarkable new energy management solutions.

Kevin Meagher
VP & General
Manager, Smart
Home

Partner or Compete: Utility Decisions on Home Energy Management
TUES, FEB 18, 4:45 PM

Kevin Meagher shares insight on successful strategies to transform energy solutions into mass-market offerings, including new opportunities for utilities in bundling and partnerships. He shares his experiences launching the Lowe's Iris product line and analyzes current business and market conditions to present the best business and monetization strategies for home energy offerings.

SPEED WIRE

Speed Wire is a leader in the installation services segment for residential and small business premise monitoring and smart home solutions.

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Accelerating the Adoption of Energy Management

RESEARCH WORKSHOP   MONDAY, FEBRUARY 17   BALLROOM A

This research workshop presents detailed findings from Parks Associates' consumer and industry studies on the home energy management markets. The research presentations detail the changes in the consumer perspective and examine new business models and opportunities that follow these changes.

Consumer Segmentation—Energy Management Adopters 1:00-1:30 PM

The most cost-effective marketing efforts are based on a thorough understanding of the attitudes and behaviors of likely adopters. In this session, Parks Associates shares attitudinal and ownership research segmentation for early adopters of energy management and provides actionable intelligence on strategies to deliver the right message to the right audience.

- Maia Hinkle, Research Analyst, **Parks Associates**

Variable Pricing 1:30-2:00 PM

While industry observers have noted that the price of electricity should be a better reflection of the cost, consumers are reluctant to assume greater risk of higher bills, creating challenges in deployment of new pricing services and rate plans. In this session, Parks Associates presents unique research on consumer receptiveness to variable pricing. The presentation includes a summary of the obstacles and potential solutions to promote widespread adoption.

- John Barrett, Director, Consumer Analytics, **Parks Associates**

The Programmable Communicating Thermostat Market 2:00-2:30 PM

The market for programmable communicating thermostats (PCTs) is experiencing dramatic growth in multiple channels. Parks Associates presents a breakdown of the market for smart thermostats, analyzing the forces driving this market and how utilities can leverage this transition to improve revenues, services, and efficiencies.

- Maia Hinkle, Research Analyst, Parks Associates
- Tom Kerber, Director, Research, Home Controls & Energy, Parks Associates

Break 2:30-3:00 PM

Bundling Home Controls & Energy Management 3:00-3:45 PM

The appeal of energy management as a stand-alone product appeals to a relatively small consumer segment. Bundling energy management with home safety and security features expands appeal to much broader groups, although different segments see value in different mixes. In this session, Parks Associates presents consumer research on home controls and energy management, including the latest research on different service packages and pricing options.

- John Barrett, Director, Consumer Analytics, **Parks Associates**

Smart Home Platforms & Energy Management 3:45-4:30 PM

Consumers will take one of two paths toward the connected home. On the first path, consumers acquire smart thermostats, network cameras, or smart appliances one at a time, as they enter the market for a specific product. On the second path, consumers purchase a connected home system that includes a bundle of safety, security, or energy-related products. This session analyzes the two paths to market and the relative strengths of OEMs and service providers as they converge in the connected home.

- Tom Kerber, Director, Research, Home Controls & Energy, Parks Associates

Interoperability Challenges & New Solutions 4:30-5:30 PM

Fragmentation and competitive forces in the industry impede standards development. As a result, a single communication standard for the connected home has not gained broad adoption. This session presents an overview of different approaches to interoperability, both in the home and in the cloud.

Interoperability in the context of the Internet of Things must be scalable. Cloud-to-cloud integration through APIs is straightforward; however, a scalable software architecture must minimize or eliminate the engineering effort to integrate APIs. Given the fragmentation within the electric utility industry and competitive forces among energy management products and services, a federated interoperability model is a practical solution. Adoption of a federated interoperability model can expand energy management capabilities by attracting the developer community and opening doors to new participants in the API economy.

- Artyom Astafurov, Chief Innovation Officer, **DataArt**
- Tom Kerber, Director, Research, Home Controls & Energy, Parks Associates

Networking Reception 5:30 PM

BALLROOM FOYER

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PARKS ASSOCIATES

12:00 PM REGISTRATION OPEN

Sponsored by **Percepscion**

1:00-5:30 PM BALLROOM A—PARKS ASSOCIATES

PRE-SHOW SMART ENERGY WORKSHOP

"Accelerating the Adoption of Energy Management"

5:30 PM

NETWORKING RECEPTION BALLROOM FOYER

Sponsored by **Parks Associates**

All sessions are in Ballrooms AB. Luncheon Keynotes are in Ballrooms CD

7:30 AM REGISTRATION

Sponsored by **Percepscion**

7:30 AM CONTINENTAL BREAKFAST

Sponsored by **Consumer Analytics**

8:30 AM

Welcome & Opening Remarks: Consumer Engagement

- Stuart Sikes, President, Parks Associates

8:45 AM

Energy Management Programs: How to Engage the Apathetic Customer

Energy management solutions create value for consumers by providing them the means to reduce their energy consumption and the convenience to control connected devices in the home. This session highlights the situations where energy efficiency matters to consumers and programs that are successful even when the consumer is not engaged.

- Scott Burns, Director of Product Innovation, Reliant
- Ted Fagenson, CMO, EcoFactor
- Denis Garman, Category Leader—Energy Management & Information Group, Duke Energy
- Tim Lott, Director of Energy, Vivint
- Jennifer Pulliam, Director of Products and Innovation, TXU Energy
- MODERATOR: Stuart Sikes, President, Parks Associates

10:00 AM

OPENING KEYNOTE

DEBBIE KIMBERLY

VP of Distributed Energy Services

Austin Energy

Leveraging New Approaches and New Technology in Addressing Utility Challenges

A Residential Demand Response V2.0 is emerging—utilizing the customer's own energy management devices to delay the need for new power generation in Texas. This transformative residential thermostat program puts the choice in customer's hands. This model drives manufacturers and web hosts to develop and market features and functionality customers want while also using open standards and protocols that enable the utility to leverage the devices in DR initiatives. This keynote addresses new approaches to providing functionality and options for consumers, including current success and future opportunities regarding Austin Energy's Power Partner Thermostat Program.

10:30 AM REFRESHMENT BREAK

Sponsored by **Tendril**

11:00 AM

Utility Strategies: Innovative Demand Response

Connectivity enables verification and measurement of any control action in near-real time and is impacting the way that utilities approach demand response programs. This session provides an assessment of trends in DR programs and highlights the more innovative demand response programs in North America.

- Anthony Hawkins, Group Product Manager, Landis+Gyr
- Dave Kaintz, Manager of Programs and Projects, Southern California Edison
- Blake Lasuzzo, SVP, Supply, Just Energy
- Robert Warden, VP of Partners and Alliances, Comverge, Inc.
- MODERATOR: Maia Hinkle, Research Analyst, Parks Associates

DETAILED AGENDA

12:15 PM

KEYNOTE LUNCHEON

ERIK CHARLTON

VP of Business, **Nest**

From Push to Pull: How Nest is Redefining Energy Services

For decades, utilities have worked hard to build an image of safety and reliability. How do they reposition themselves as innovative energy partners? Erik will share how Nest is working with energy companies across the country to help customers save while staying comfortable. He'll also share how Nest has managed to upend the traditional thermostat business model through design, service and connectivity.

1:30 PM

Partnerships & New Business Opportunities for the Smart Home Platform

This session discusses partnership opportunities between utilities and smart home product and service providers. It analyzes programs that incentivize third parties to partner with utilities in promoting energy-saving products and services, increasing energy awareness, and achieving demand-response and energy-efficiency goals.

- Joe Jankosky, Director, Intelligent Home Vertical Markets, **Time Warner Cable**
- Jay Kenny, Vice President, Marketing, **Alarm.com**
- Letha McLaren, VP, Product Management, **iControl Networks**
- Kevin Meagher, VP & General Manager, Smart Home, **Lowe's**
- MODERATOR: Tom Kerber, Director, Research, Home Controls & Energy, **Parks Associates**

2:30 PM

Moving Customers to Variable Pricing Programs

Less than 20% of U.S. broadband households are aware of programs such as tiered pricing, time-of-use, and energy monitoring devices. As real-time measurement and verification become a reality, utilities can transition away from demand side management programs to demand side management markets. This session reviews different approaches to variable pricing programs and how to overcome consumer objects through incentives or risk mitigation.

- Eric Danziger, VP, Business Development, **Genability**
- Kevin Hamilton, Senior Director of Product Marketing, **Opower**
- Alan Shaffer, Deputy General Manager, **Lakeland Electric**
- MODERATOR: Maia Hinkle, Research Analyst, **Parks Associates**

3:30 PM   REFRESHMENT BREAK

Sponsored by **AlertMe**

4:00 PM

Standards & Interoperability: Solutions That Bring It All Together

This session reviews the technologies that will enable energy utilities to participate in the smart home and the larger trend toward the Internet of Things.

- Duncan Bees, Chief Technology and Business Officer, **HGI**
- Garth Hillman, Secretary, Smart Grid Marketing and Technical Task Groups, **Wi-Fi Alliance**
- Fabrice Hoerner, Technical Marketing, Sr. Manager, **Qualcomm**
- Ryan Maley, Director of Strategic Marketing, **ZigBee Alliance**
- Bill Scheffler, Director of NA Sales and Business Development, **Z-Wave/Sigma Designs**
- MODERATOR: Tom Kerber, Director, Research, Home Controls & Energy, **Parks Associates**

4:45 PM

CLOSING KEYNOTE

KEVIN MEAGHER

VP & General Manager, Smart Home, **Lowe's**

Partner or Compete: Utility Decisions on Home Energy Management

The market for home energy management offerings is expanding, bringing in new players and more options to consumers. At the same time, multiple factors influence the design and deployment of new, more robust energy management offerings, with security service providers, manufacturers, and retailers all converging in the connected home.

Currently the role of utilities is unclear. The traditional pilot approach to energy efficiency and demand response programs is failing to keep pace with the explosion of connected devices. In his keynote, Kevin Meagher shares insight on successful strategies to transform energy solutions into mass-market offerings, including new opportunities for utilities in bundling and partnerships. He shares his experiences launching the Lowe's Iris product line and analyzes current business and market conditions to present the best business and monetization strategies for home energy offerings.

5:15 PM

Closing Comments

5:30 PM   **Networking Reception**   BALLROOM FOYER

Sponsored by **CONNECTIONS**™: **The Premier Connected Home Conference**

7:30 PM   **Networking Dinner**

Sponsored by **Speed Wire**

7:30 AM CONTINENTAL BREAKFAST

Sponsored by **Consumer Analytics**

CONSUMER ANALYTICS

8:15 AM

Opening Comments: Business Models and New Value Propositions

▪ Stuart Sikes, President, **Parks Associates**

8:45 AM

Who Pays? New Ways to Monetize Home Controls

Innovative business models can disrupt mature markets and create new opportunities. This session explores alternative monetization strategies, highlighting models that do not rely on consumer paid recurring fees.

▪ David Bercovich, Strategic Communications Consultant, **AlertMe**
▪ David Friedman, Co-Founder and CEO, **Ayla Networks**
▪ Gene Wang, CEO, **People Power**
▪ MODERATOR: Stuart Sikes, President, **Parks Associates**

9:45 AM

KEYNOTE

STUART LOMBARD
President & CEO, **ecobee**

The API Economy: The Impact to Consumers and Energy Management

How do we accelerate the connection to the Internet of Things? Stuart Lombard, CEO of ecobee, believes the answer is simple: embracing partners and the Open API model. During the keynote, Stuart will explain how an open API model will eliminate obstacles and reduce friction for revolutionary new energy management models. Telling the story of his company, he'll share how ecobee embraced the API economy to do things that wouldn't have otherwise been possible, like integrating with energy companies such as AutoGrid, Earth Networks, and Integral Analytics, and working with innovative smart home solutions like SmartThings and Control4. Stuart will illustrate how the open API economy opens doors to remarkable new energy management solutions.

BALLROOMS CD

10:15 AM

SPECIAL SESSION

The Impact of Solar and Electric Vehicles on Home Energy Management

▪ Tomoyuki Nanami, General Manager, **DENSO WAVE INCORPORATED**
▪ MODERATOR: Tom Kerber, Director, Research, Home Controls & Energy, **Parks Associates**

10:45 AM REFRESHMENT BREAK

Sponsored by **Schneider Electric**

Schneider Electric

11:15 AM

Expanding the Energy Markets through Connected Devices

As more connected devices enter the market, the opportunity to aggregate these devices and directly connect them to participate in energy markets is real. This panel addresses the evolution of connected devices and the impact for demand response solutions in the energy markets.

▪ Seth Frader-Thompson, President, **EnergyHub**
▪ Kristian Handberg, Principal Consultant, **Percepscion**
▪ Yann Kulp, Vice President, Strategy and Business Development, EcoBusiness North America, **Schneider Electric**
▪ Duane Paulson, SVP, **Linear LLC**
▪ Bram Reinders, Director Alliance Management, **CleanTX/Alliander**
▪ MODERATOR: Stuart Sikes, President, **Parks Associates**

12:15 PM

Sponsored by **Connected Health Summit**

CONNECTED HEALTH SUMMIT Engaging Consumers

COMCAST

KEYNOTE LUNCH

BILL HORROCKS
VP, Product Management —Xfinity Home, **Comcast**

Connected Homes Power Energy Management

Service providers are offering a range of connected home solutions across the country. Comcast is one the largest connected home platforms in the world. Energy-related solutions are a key component to the strategy and shown to drive significant customer value. Scale, breadth of devices and data analytics can lead to innovative energy offerings that drive customer engagement through personalization, savings and ease of use.

1:30 PM

Energy Management Capabilities of Smart Home Systems and Connected Products

This session examines the expanding capabilities of energy management and the growing deployment of smart home systems and connected products. While the primary selling features for many smart home products and systems may not be energy related, new products have expanded energy management features and capabilities. This panel highlights innovative solutions for energy management.

- Syed Zaeem Hosain, CTO, **Aeris Communications, Inc.**
- Dan Lieberman, Senior Director of Platform Strategy, **SmartThings**
- Jeff Wilson, Director of Product Management, **NETGEAR**
- Joseph Franz, Strategic Channel Partnership Development, **Constellation**
- MODERATOR: Tom Kerber, Director, Research, Home Controls & Energy, **Parks Associates**

2:30 PM

Big Data & Analytics: Residential Energy Applications

What seems to some as a burden, the mountain of data generated from smart meters, may become a goldmine. This panel discusses how data analytics are being applied in residential programs.

- V. Rory Jones, President, **PlanetEcosystems**

- Dave Oberholzer, Director, Energy Products & Business Development, **Earth Networks - WeatherBug**
- Matt Plante, Vice President of Sales, **Bidgely, Inc.**
- Matthew Smith, Senior Director, Utility Solutions, **Silver Spring Networks**
- MODERATOR: Stuart Sikes, President, **Parks Associates**

3:30 PM

Net Zero: The Impact on the Utility Business Model

Traditional utility business model will continue to change as new solutions are introduced that allow consumers to be more energy efficient. This session explores trends in residential solar and wind power generation and the impact on utilities and consumers.

- Brent Hodges, Senior Vice President Retail Unit, **Tendril**
- Dave Hyland, Manager, Business Development, **Schneider Electric**
- Brewster McCracken, President & CEO, **Pecan Street Project Inc**
- Ted Reguly, Director, **San Diego Gas and Electric**
- Ken Wacks, Management & Engineering Consultant, **Gridwise Architecture Council, U.S. Department of Energy**
- MODERATOR: Tom Kerber, Director, Research, Home Controls & Energy, **Parks Associates**

4:30 PM

Closing Comments

The expertise behind Australia's largest energy provider.

When Australia's largest energy provider needed a partner to design and deliver a home energy monitor, Origin Energy chose Percepscion.

Launched in 2013, the Origin home energy monitor is now Australia's best selling Smart Energy product and has helped Origin attract and retain thousands of customers.

With a track record of delivering leading innovations such as ChargeIQ, the world's first ZigBee certified EV charger and the real-time energy information platform LiveVu, let Percepscion deliver your company a Smart Energy advantage.

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Speed Wire

Speed Wire is a leader in the installation services segment for residential and small business energy management and premise monitoring solutions. Building on our 15 year legacy as a high quality provider of technology deployment services, we install and maintain a wide variety of equipment for the dominate players in the broadband, security, IT, wireless, enterprise, connected home and smart energy industries.

We have a national footprint of highly professional and experienced field resources. Our Smart Tech program ensures that all resources have undergone a thorough screening process, have the appropriate certifications, background checks and training to ensure successful field deployments. Our proprietary technology deployment life cycle is a workflow automation tool that automates scheduling, field execution, documentation collection and billing. **www.speedwireinc.com**

Registration Sponsor

Percepscion

Percepscion is Australia's leading Smart Energy technology provider, specializing in the development of energy management products for the Connected Home. Percepscion's products help people manage their electricity consumption and decrease their power bills.

Percepscion's expertise comes from its extensive experience partnering with utilities to help design their Smart Energy programs. Based on this, Percepscion have designed a suite of products that are at the forefront of energy management for the Connected Home, such as Australia's best selling Smart Energy device, the Origin home energy monitor.

For more information, visit Percepscion around the Web: **www.percepscion.com** info@percepscion.com | twitter.com/percepscion | linkedin.com/company/Percepscion

Event Sponsors

Alarm.com

Founded in 2000, Alarm.com is the leading technology provider for the connected home, powering more than 1 million households. Our cloud-based platform connects the widest range of devices throughout the home and delivers a complete solution through a single, easy to use app. From intelligent learning and personalized optimization to the rapid integration of new partner products, we offer the most advanced and latest technologies for the connected home. Consumers choose from a range of leading services, including Interactive Security, Energy Management, Home Automation and Video Monitoring, exclusively offered through our network of authorized and licensed partners for easy configuration and installation. **www.alarm.com**

Earth Networks

WeatherBug Home combines data from more than 10,000 Earth Networks weather stations with customer energy use information and a comprehensive set of analytics to bring a new approach to residential energy efficiency. The WeatherBug Home ScoreCard is an easy-to-understand monthly report analyzing consumer's energy use compared to the weather, providing energy-use forecasts for the next month—and suggested improvements. WeatherBug Home is a complete Integrated Demand Side Management (IDSM) service that optimizes residential thermostat set-points for EE every day, and DR when necessary offering flexibility to layer on analytics-informed behavioral EE techniques, variable rates or Peak Time Rebates (PTRs). **www.earthnetworks.com**

ecobee

We're ecobee—an award-winning provider of energy solutions that helps people understand, manage and reduce their energy consumption. Our Wi-Fi thermostats, online web portals and smart phone apps are not only built to last, they're built to make sense. And they're made for real people who want to save on energy costs without sacrificing comfort. We're proud to be the brand that's at the forefront of energy automation. But more than anything, we're proud that our customers can always count on us for smart, innovative solutions that have a meaningful impact on their lives and on their communities. **www.ecobee.com**

EcoFactor

EcoFactor is the leading residential energy management company that enables home service providers to offer an energy management service to their customers that does not require them to compromise comfort or change behavior. The EcoFactor platform uses data from communicating thermostats to determine the unique thermal characteristics of each home and automatically optimize energy use to eliminate waste and save money.

Based in Redwood City, Calif., EcoFactor was founded in 2006 to provide an automated alternative to behavior-based residential energy management solutions. EcoFactor is privately held and funded by Claremont Creek Ventures and RockPort Capital Partners. **www.ecofactor.com**

Lowe's

Lowe's has entered the Smart Home market with a broad range of innovative new connected products and services using their Iris platform. Iris allows consumers to monitor and control their home from their computer, tablet, or smart phone. The broad range of Iris products and services are designed to appeal to the average consumer with simple and affordable bundles that make homes safer, more energy efficient and convenient to manage. **www.lowes.com/iris**

Opower

Working with 90 utility partners and serving more than 20 million consumers across eight countries, Opower is a leading provider of cloud-based software to the utility industry. Opower's platform uses big data analytics and behavioral science to enable utilities to achieve energy outcomes, including energy efficiency, customer engagement and demand response. Founded in 2007 and privately held, Opower is headquartered in Arlington, Virginia, with offices in San Francisco, London, Singapore and Tokyo. For more information, please visit **www.opower.com** and follow us on Twitter at @Opower.

People Power

People Power is an award-winning software company enabling remote control and management of connected devices from your smart phone. People Power's groundbreaking smartphone app, Presence, transforms spare smartphones and tablets into wireless video cameras for monitoring, control, and more. Cameras can be monitored in real-time from another device with the Presence app, and they can send meaningful alerts with video clips to the user's email any time motion is detected. You can also control your devices from Presence manually, or with our easy "set and forget" rules engine. People Power's open developer platform enables manufacturers and software developers to deliver solutions that engage people while increasing safety and security, improving control and convenience, and saving money. Presence: keep an eye on your home from the palm of your hand. **www.peoplepowerco.com**

PlanetEcosystems

PlanetEcosystems (PEI) is a utility consumer engagement technology provider. PEI's P-ECOSYS Consumer Engagement Platform is a purpose-built technology platform designed to allow client websites engage with consumers of utility services in meaningful and valued relationships that heighten loyalty. P-ECOSYS supports electricity, gas and water services in a highly configurable solution; consumer information collection is largely automated using Green Button and many other web sources. www.planetecosystems.com

Qualcomm

Qualcomm is the world leader in next-generation mobile technologies and the world's largest manufacturer of wireless chipsets. For more than 25 years, Qualcomm ideas and inventions have driven the evolution of digital communications, connecting people more closely to information, entertainment and each another. Today, Qualcomm technologies are powering the convergence of mobile communications and consumer electronics, making wireless devices and services more personal, affordable and accessible to people everywhere.

For more information, visit Qualcomm around the Web: **www.qualcomm.com**
www.qualcomm.com/blog | www.twitter.com/qualcomm | www.facebook.com/Qualcomm

Technicolor

Technicolor is home to industry-leading creative and technology professionals committed to the creation, management and delivery of entertainment content to consumers around the world. Propelled by a culture of innovation and underpinned by a dedicated research organization, the company's thriving licensing business possesses an extensive intellectual property portfolio focused on imaging and sound technologies. Serving motion picture, television, and other media clients, the company is a leading provider of high-end visual effects, animation, and postproduction services. In support of network service providers and broadcasters globally, Technicolor ranks among the worlds' leading suppliers of digital content delivery services and home access devices, including set-top boxes and gateways. The company also remains a large physical media service provider, being one of the world's largest film processors and independent manufacturers and distributors of DVDs and Blu-ray™ discs. Euronext Paris: TCH **www.technicolor.com**

Z-Wave

Z-Wave technology and is an open internationally recognized ITU standard (G.9959). It is the leading wireless home control technology in the market today, with over 1000 certified interoperable products worldwide. Represented by the Z-Wave Alliance, and supported by more than 250 companies around the world, Alliance members lead the home controls market, providing leading edge products and systems that deliver increased comfort, convenience, energy conservation, safety and security and aging in place. The Z-Wave standard is a key enabler of smart living solutions for deployment in all channels from service providers to etail and retail, security companies, builders and installers, as well small business and commercial and hospitality. With over 20 million end devices in homes, Z-Wave is a key enabler of the Internet of Things. **http://z-wave.sigmadesigns.com**

AlertMe

AlertMe is an award winning, fast growing technology company (No.9 in the Sunday Times Tech Track 100 and named in the Red Herring Global 100 list of most promising companies), backed by world class investors.

It provides a cloud link to the home and a platform that allows consumers to control their home energy and devices over the internet or on their Smartphone from anywhere.

AlertMe's business model is to work with tier one channel partners and it is already rolling out our services to mass market consumers in the USA, UK and Europe and the USA through Lowe's, British Gas and Essent. **www.alertme.com**

Schneider Electric

As a global specialist in energy management with operations in more than 100 countries, Schneider Electric offers integrated solutions across multiple market segments, including leadership positions in energy and infrastructure, industrial processes, building automation, and data centers/networks, as well as a broad presence in residential applications.

Focused on making energy safe, reliable, and efficient, the company's 110,000 plus employees achieved sales of more than $26 billion in 2010, through an active commitment to help individuals and organizations "Make the most of their energy." **www.schneider-electric.com**

Tendril

Tendril is the Energy Platform company, delivering end-to-end consumer engagement products, applications and services powered by Tendril Connect™—an open standards-based, secure and scalable platform that takes the complexity out of the Energy Internet and creates a dialogue between energy service providers and their customers. Delivering consumer engagement software, in-home products and applications as well as easy to integrate utility solutions such as Demand Response and Energy Efficiency, Tendril offers unparalleled insight into energy decisions, making the Energy Marketplace a reality. The company is venture backed by VantagePoint Capital Partners, Siemens Venture Capital (SVC), Good Energies, RRE Ventures and GE.

For more information, visit **www.tendrilinc.com**.

Antenna Systems & Technology

Antenna Systems & Technology is a trade magazine for antenna professionals, including commercial operators, OEMs that integrate antennas and components into their wireless systems and infrastructures, antenna manufacturers, dealers/distributors and companies involved with wireless systems, cellular, and RF & microwave communications markets. Distribution is by controlled circulation of 10,000 copies to qualified recipients, primarily in North America. www.antennasonline.com

BoogarLists

With a qualified directory of more than 2,000 Venture Capital and Mid-Market/LBO private equity firms, BoogarLists is an excellent place for entrepreneurs to begin their search for investment capital. Whether starting a new company or striving to take an early stage company to the next level, CEO's and CFO's will invariably want to seek out new sources of capital or other financial services. BoogarLists provides an extensive directory of financial, operations and marketing services, as well as a comprehensive directory of conferences and associations, across the technology, media and communications industries. www.boogar.com

CABA

CABA is the definitive source of global information relating to the benefits of technology and integrated systems to support automation in the global home and building industry. CABA recognizes, captures, and shares innovation and this information is a must read for those involved and interested in the application of automation in the global home and building industry. www.CABA.org

CleanTX

CleanTX is the clean energy and technology industry group for Central Texas. Headquartered in our capital city of Austin, CleanTX is uniquely positioned at the nexus of government, industry, academia, utility, and community interests. Through our advancement of partnerships, leadership on community education, and networking platform for industry stakeholders, CleanTX supports the rapidly growing clean energy economy of Central Texas. http://cleantx.org

EIS Alliance

The EIS Alliance is a nonprofit corporation formed to ensure Customer Energy Management Systems (CEMS) interoperability, while providing increased customer energy efficiency, and improved reliability with state-of-the-art security for the Smart Grid. The EIS Alliance is fostering the adoption, development, and compliance of global CEMS standards through collaboration, education, and marketing, while facilitating standards compliance through testing and certification programs. Members of the EIS Alliance include A.O. Smith, Aruba Networks (NASDAQ: ARUN), Coulomb Technologies, Ecotality, Generac, Honeywell (NYSE: HON), Johnson Controls (NYSE: JCI), ParkPod & Trane a business of Ingersoll Rand (NYSE:IR). www.eisalliance.org

ESNA

ESNA: making standards available to grow the ecosystem.

Energy Services Network Association (ESNA) is an independent global, not-for-profit association under Dutch law. Members are utilities, software, hardware and service providers, and solution integrators sharing a common goal and vision for promoting open standards for energy demand side management, smart grid and smart metering systems. The association promotes the adoption of the Open Smart Grid Protocol (OSGP) and related services and infrastructure, based on Networked Energy Services (NES), together with the value-added applications for secure, reliable and cost-effective automatic meter management, smart grid management, billing, CRM, CIS and other applications.

In 2010, ESNA members announced their intent to publish OSGP as an open standard, enabling independent implementation of interoperable meters and other smart grid devices from multiple vendors on the same network. Built on open ISO/IEC and IEEE standards, OSGP adds additional security and reliability services necessary to properly network and manage devices in the smart grid. The OSGP standard will ensure reliability, robustness, and efficiency of the smart grid, and as applications are deployed such as point-of-use monitoring and control of power usage, it will enable utilities to reduce peak loads and pass on energy cost savings to consumers. In addition to building OSGP-compliant solutions, utilities can better avoid vendor lock-in and purchase best-in-class products to achieve better ROI. www.esna.org

FierceEnergy

FierceEnergy tracks the latest developments and advancements in the energy industry. Every business day, energy service provider executives rely on FierceEnergy's free email newsletter & website to stay up-to-date on renewable energy integration, smart grid news, consumer consumption, customer service innovations & more. www.fierceenergy.com

FierceSmartGrid

Written with a focus on industry CTOs and technical infrastructure decision-makers, FierceSmartGrid covers the latest business and technology news surrounding network intelligence, home networking, smart meters, and other key issues. Join energy and telecom industry insiders who subscribe to FierceSmartGrid's free weekly email newsletter to keep up with this evolving marketplace. www.FierceSmartGrid.com

HiddenWires

HiddenWires is the leading trade publication for the home automation and residential systems industry in the EMEA (Europe, Middle East and Africa). It offers a products and services directory, news, articles, case studies, events and training calendars, a bookshop, and useful links to trade organizations and other resources. Visitors can also sign up to the free email newsletter. Founded in 2003, HiddenWires has grown to over 9000 pages, attracts 90,000 visitors every month and has 16,000 subscribers. http://hiddenwires.co.uk

Home Gateway Initiative

HGI, founded by major broadband service providers and joined by leading vendors of digital home equipment, is shaping the way that IP services are delivered to the home. It publishes requirements for digital home building blocks. This includes the hardware and software in the digital home that connect consumers and services. www.homegatewayinitiative.org

HomePlug Alliance

HomePlug® Alliance is a group of about 60 companies working together to develop technology specifications and certification & logo programs for powerline networking. With HomePlug technology, the electrical wires in the home can now distribute broadband Internet, HD video, digital music and smart energy applications. Over 300 products are HomePlug certified, and over 100 million devices are in the market. HomePlug products are used worldwide by consumers and service providers to improve home networking performance while expanding coverage and Wi-Fi® mobility. HomePlug® is a trademark of HomePlug Powerline Alliance, Inc. in the U.S. and other countries. www.homeplug.org

KNXtoday

KNXtoday is a trade magazine for KNX home and building control comprising an online magazine and email newsletter. KNX is the worldwide standard for home and building control, and is approved as an International Standard (ISO/IEC 14543-3) as well as an European Standard (CENELEC EN 50090 and CEN EN 13321-1) & Chinese Standard (GB/Z 20965). KNXtoday offers news, articles, case studies, videos and resources, an events calendar and much more. Visitors can also sign up to the free email newsletter, or follow us on Twitter, LinkedIn, Facebook, Google+ and Pinterest. http://KNXtoday.com

LonMark International

LONMARK International is a non-profit corporation supporting the testing and certification of products, people and companies supporting the ISO/IEC 14908 body of standards. Its nearly 400 members manufacture, distribute, develop, install or use systems based on these standards. LonMark International provides peer-review based certification guidelines and testing for products, people and companies. www.lonmark.org

Northeast Energy Efficiency Partnerships

NEEP's mission is to serve the Northeast and Mid-Atlantic to accelerate energy efficiency in the building sector through public policy, program strategies and education. Our vision is that the region will fully embrace energy efficiency as a cornerstone of sustainable energy policy to help achieve a cleaner environment and a more reliable and affordable energy system. http://neep.org/

OpenADR Alliance

The OpenADR Alliance was formed to foster the development, adoption and compliance of the OpenADR standards through collaboration, education, training, testing and certification. The Alliance is supported by a broad cross section of utilities, independent system operators, regional transmission operators, regulators and vendors who share a common interest in the success and widespread adoption of the OpenADR standard. www.openadr.org

Remote Site & Equipment Management

Remote Site & Equipment Management magazine is a product, service and news magazine edited for owners, operators and managers of remotely located and/or remotely operated sites, facilities and equipment. Readers are executives, managers and technical professionals responsible for the development and operation of communication systems, transmission systems, oil & gas sites, pipelines, utility facilities, agricultural operations, weather stations, transportation facilities and equipment, natural resource and wildlife management activities, weather and environmental monitoring systems, military/defense facilities and equipment, and other remotely-controlled or unattended facilities and equipment. www.remotemagazine.com

Smart Grid Interoperability Panel

The Smart Grid Interoperability Panel (SGIP) orchestrates the work behind power grid modernization. SGIP was established to identify technical and interoperability standards harmonization that accelerates modernization of the grid. As a member-funded, non-profit organization, SGIP helps utilities, manufacturers and regulators address standards globally: utilities gain improved regulatory treatment for investment recovery and manufacturers obtain enhanced commercial opportunities worldwide. SGIP members stay competitive, informed and well-connected. http://sgip.org

SmartGridCareers.com

www.SmartGridCareers.com offers you a middle ground for your recruiting needs… a talent sourcing solution that lies midway between a job board and a professional recruiter—one that identifies and delivers quality candidates cost-effectively. Leveraging a powerful combination of cutting-edge technology and extensive experience within the Smart Grid and Renewable Energy sectors, we can help you maximize your recruitment ROI. Our proprietary sourcing strategy coupled with our specialization in these niche markets enables us to improve the efficiency of the overall recruitment process saving you valuable time and money. Contact us at 561-200-3248 to learn more about our fully customized solutions! www.smartgridcareers.com

U-SNAP Alliance

The mission of the Utility Smart Network Access Port (U-SNAP) Alliance is to create a protocol independent serial interface standard that enables any HAN (Home Area Network) standard, present and future, to use any vendor's Smart Meter as a gateway into the home, without adding additional hardware in the Smart Meter. The U-SNAP Alliance fosters collaboration and education among utilities, AMI suppliers, HAN venders, industry consultants, academics and regulators who seek interoperable, secure and cost effective solutions for extending the Smart Grid to energy aware consumer products. www.usnap.org

UPnP Forum

UPnP Forum, established in 1999, is a global alliance of nearly 1,000 industry-leading organizations working to enable device-to-device interoperability and facilitate easier and better home networking. The Forum promotes the adoption of uniform technical device interconnectivity standards and certifies devices conforming to these standards. www.upnp.org

Wi-Fi Alliance

Wi-Fi Alliance® is a global non-profit industry association of hundreds of leading companies devoted to seamless connectivity. With technology development, market building, and regulatory programs, Wi-Fi Alliance has enabled widespread adoption of Wi-Fi® worldwide. The Wi-Fi CERTIFIED™ program was launched in March 2000. It provides a widely-recognized designation of interoperability and quality, and it helps to ensure that Wi-Fi-enabled products deliver the best user experience. Wi-Fi Alliance has certified more than 15,000 products, encouraging the expanded use of Wi-Fi products and services in new and established markets. www.wi-fi.org

WSNBuzz.com

WSNBuzz.com is a blog providing fresh updates on smart grid technologies, covering new standards, products, deployments, industry moves and events of interest. www.wsnbuzz.com

ZigBee Alliance

ZigBee offers green and global wireless standards connecting the widest range of devices to work together intelligently and help you control your world. The ZigBee Alliance is an open, non-profit association of approximately 400 organizations driving development of innovative, reliable and easy-to-use ZigBee standards. The Alliance promotes worldwide adoption of ZigBee as the leading wirelessly networked, sensing and control standard for use in consumer, commercial and industrial areas. www.ZigBee.org

The Market for Energy & Smart Home Services

Technology Adoption is Accelerating

- In the past 12 months, 47% of U.S. broadband households switched to CFL/LED bulbs, and 48% adjusted the thermostat to save money

- Roughly 50% own a programmable thermostat, and 11% have a thermostat that can connect to the Internet

- Roughly 7% own smart lighting

However, there is still a lag in adoption of utility-led energy-saving programs and services. Less than 15% of households are familiar with load control programs.

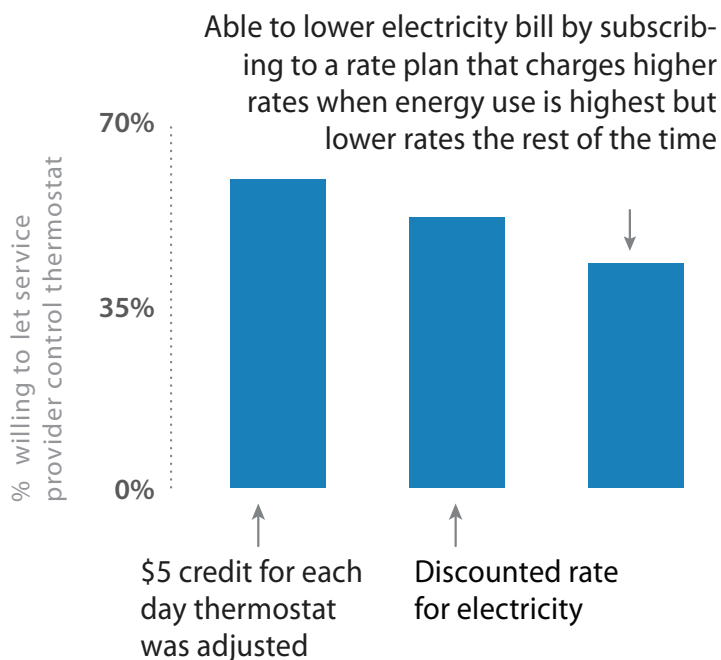*Low adoption does not mean lack of interest, though.*

Consumer interest in demand response programs can reach 60% of households, provided utilities stress the correct incentives.

AN INCENTIVE OF $5 PER DAY, for each day the thermostat is adjusted, is the most popular incentive among U.S. broadband households presented with different DR scenarios.

ADDITIONALLY—62% of U.S. broadband households would purchase a smart thermostat with a $75 rebate.

## Receptiveness to Remote Thermostat Adjustment: Incentives

U.S. Broadband Households

Able to lower electricity bill by subscribing to a rate plan that charges higher rates when energy use is highest but lower rates the rest of the time

% willing to let service provider control thermostat

- 70%
- 35%
- 0%

$5 credit for each day thermostat was adjusted

Discounted rate for electricity

© Parks Associates

360 View: *Energy & American Broadband Households*, new research from Parks Associates, reveals a willingness among U.S. broadband households to adopt certain energy-saving behaviors and solutions.
www.parksassociates.com/360-energy

Satisfaction with Energy Services

Thirty-seven percent of U.S. broadband households are satisfied with their electricity plan, but a variety of factors can raise satisfaction rates above that average.

Satisfaction by Plan Characteristics

U.S. Broadband Households Who Receive Electricity Bills
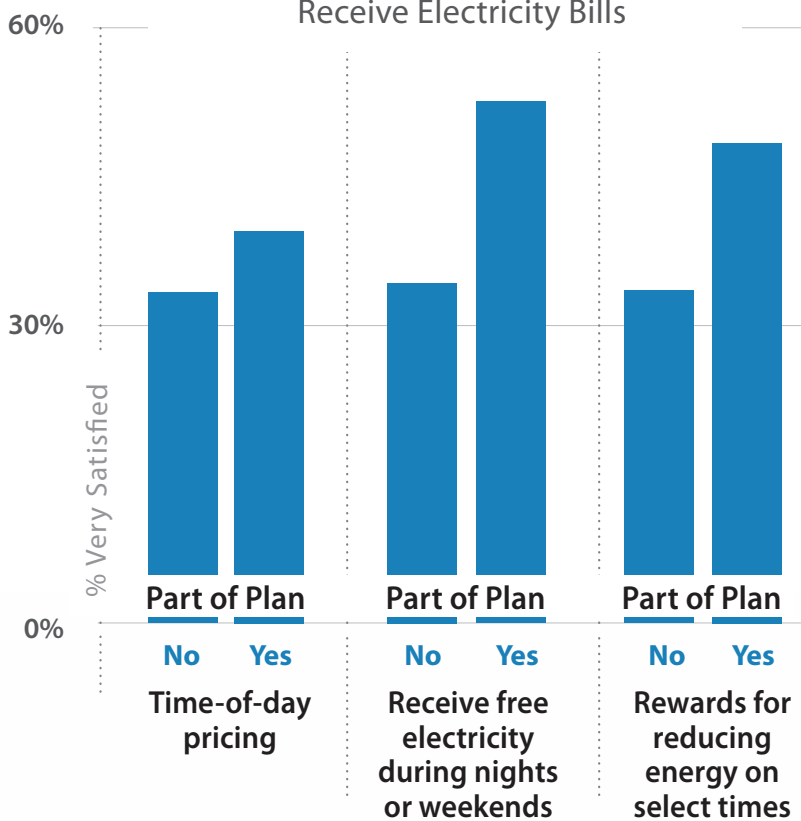
© Parks Associates

FOR EXAMPLE among households who can choose their electricity provider, satisfaction rates are at 50%, even though few of them have ever actually switched providers

26% OF U.S. broadband households can currently switch providers

ONLY 33% of these households have switched providers at least once

OVER 40% of consumers 18-34 have switched their electricity provider at least once. Young consumers are more likely than older ones to switch providers.

FREE NIGHTS OR WEEKENDS also correlates to higher satisfaction;

53% of households with this plan are satisfied.
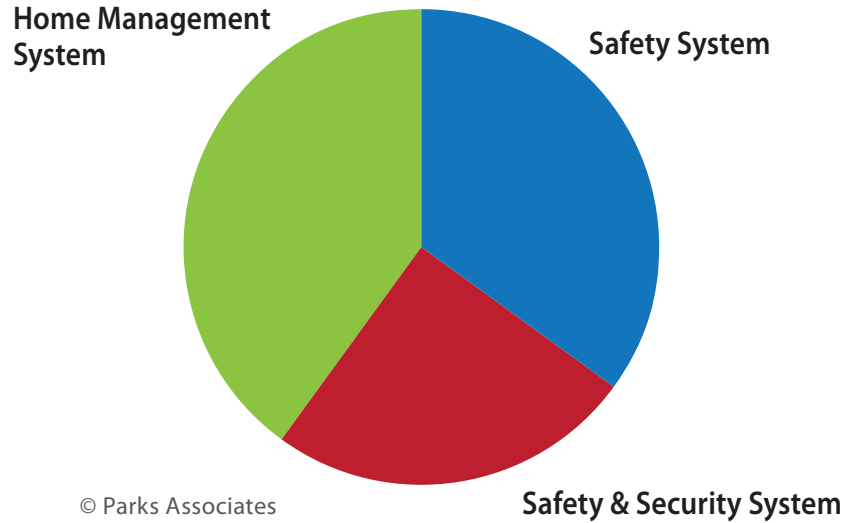
Smart Home Packages

Parks Associates tested consumer interest in three different smart home packages:

- **HOME SAFETY SYSTEM**—text alerts for fire, flood, leaks, etc.

- **HOME SAFETY AND SECURITY**—text alerts plus home monitoring equipment, viewable on a smartphone or PC

- **HOME MANAGEMENT**—text alerts and home monitoring equipment plus ability to adjust home thermostat
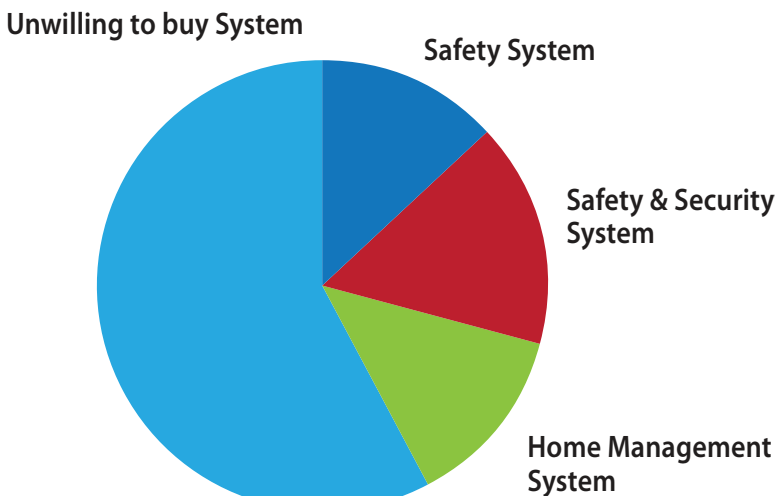
Preferred Smart Home Package

U.S. Broadband Households

"Which of these three systems best suits your home's needs?"

Home Management System

Safety System

Safety & Security System

© Parks Associates

Likely Buyers of Smart Home Packages

U.S. Broadband Households

Unwilling to buy System

Safety System

Safety & Security System

Home Management System

© Parks Associates

Each smart home package appealed to approximately two-thirds of U.S. broadband households, with nearly 60% of households finding all three packages appealing. In a head-to-head matchup, a plurality (40%) of households felt the home management system best suited their needs, which included the key energy-related benefit of remote control/monitoring of the household thermostat.

However, once price and willingness to purchase are factored in, only 43% of U.S. broadband households are willing to purchase a smart home package, and this group of likely buyers splits evenly among the three packages.
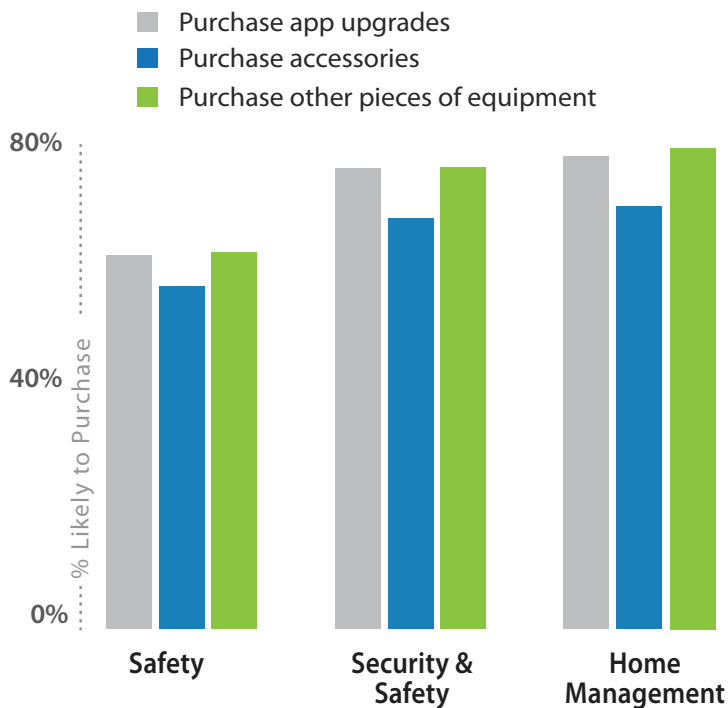
Revenues

Much of the price sensitivity surrounding these systems comes from consumer aversion to new and recurring fees. Consumers are more likely to purchase the original packages outright rather than opt for a subsidized pricing model with a mandatory contract.

This market reality will force providers to seek and develop alternate means of revenue growth.

One promising area is in-app promotions and purchases:

- A majority of consumers likely to purchase a smart home package are willing to purchase upgrades, accessories, and equipment through the system's app. In-app purchases represent a new, highly targeted channel for energy management products and services.

- Consumers are willing to have advertisements on the system app if it allows them to avoid monthly monitoring fees.

Likely Smart Home Buyers: In-App Purchases

"How likely would you be to use the following features in the app that controls the system?"

U.S. Broadband Households Likely to Buy Specified Package

Legend:
- Purchase app upgrades
- Purchase accessories
- Purchase other pieces of equipment

(Bar chart, Y-axis: % Likely to Purchase, 0% to 80%; X-axis categories: Safety, Security & Safety, Home Management)

© Parks Associates

For more information on **360 View:** *Energy and American Broadband Households*, contact sales@parksassociates.com or visit www.parksassociates.com/360-energy.

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All sessions are in **Ballrooms AB**. Luncheon Keynotes are in **Ballrooms CD**.

MONDAY, FEB. 17

12:00 PM REGISTRATION OPEN
Sponsored by **Percepscion**

1-5:30 PM Parks Associates PRE-SHOW SMART ENERGY WORKSHOP
"Accelerating the Adoption of Energy Management"

1:00 PM Consumer Segmentation—Energy Management Adopters
1:30 PM Variable Pricing
2:00 PM The Programmable Communicating Thermostat Market
3:00 PM Bundling Home Controls and Energy Management
3:45 PM Smart Home Platforms and Energy Management
4:30 PM Interoperability Challenges and New Solutions

5:30 PM NETWORKING RECEPTION BALLROOM FOYER
Sponsored by **Parks Associates**

TUESDAY, FEB. 18

7:30 AM REGISTRATION OPEN
Sponsored by **Percepscion**

7:30 AM CONTINENTAL BREAKFAST
Sponsored by **Consumer Analytics**

8:30 AM **Welcome and Opening Remarks: Consumer Engagement**

8:45 AM **Energy Management Programs: How to Engage the Apathetic Customer**

10:00 AM OPENING KEYNOTE
Leveraging New Approaches and New Technology in Addressing Utility Challenges
Deborah Kimberly, VP of Distributed Energy Services, Austin Energy

10:30 AM REFRESHMENT BREAK
Sponsored by **Tendril**

11:00 AM **Utility Strategies: Innovative Demand Response**

12:15 PM KEYNOTE LUNCHEON BALLROOM CD
From Push to Pull: How Nest is Redefining Energy Services
Erik Charlton, VP of Business, Nest

1:30 PM **Partnerships & New Business Opportunities for the Smart Home Platform**

2:30 PM **Moving Customers to Variable Pricing Programs**

3:30 PM REFRESHMENT BREAK *Sponsored by* **AlertMe**

4:00 PM **Standards & Interoperability: Solutions That Bring It All Together**

4:45 PM CLOSING KEYNOTE
Partner or Compete: Utility Decisions on Home Energy Management
Kevin Meagher, VP & General Manager, Smart Home, Lowe's

5:15 PM **Closing Comments**

5:30 PM NETWORKING RECEPTION BALLROOM FOYER
Sponsored by **CONNECTIONS™**

7:30 PM **NETWORKING DINNER**
Sponsored by **Speed Wire**

WEDNESDAY, FEB. 19

7:30 AM CONTINENTAL BREAKFAST
Sponsored by **Consumer Analytics**

8:15 AM **Opening Comments: Business Models and New Value Propositions**

8:45 AM **Who Pays? New Ways to Monetize Home Controls**

9:45 AM KEYNOTE
The API Economy: The Impact to Consumers and Energy Management
Stuart Lombard, President and CEO, ecobee

10:15 AM SPECIAL SESSION
The Impact of Solar and Electric Vehicles on Home Energy Management

10:45 AM REFRESHMENT BREAK
Sponsored by **Schneider Electric**

11:15 AM **Expanding the Energy Markets through Connected Devices**

12:15 PM KEYNOTE LUNCHEON BALLROOM CD
Connected Homes Power Energy Management
Bill Horrocks VP, Product Management
—Xfinity Home, Comcast
Sponsored by **Connected Health Summit**

1:30 PM **Energy Management Capabilities of Smart Home Systems and Connected Products**

2:30 PM **Big Data & Analytics: Residential Energy Applications**

3:30 PM **Net Zero: The Impact on the Utility Business Model**

4:30 PM **Closing Comments**

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