



21st Annual National Energy Restructuring Conference

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Energy Choice 2.0
*A New Era in Consumer Choice,
Innovation and Opportunities*

May 1-2, 2018



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21st Annual National Energy Restructuring Conference

★ Many Thanks to NEM's Executive Committee Leadership Team

- **Chair** – Pierre Koshakji (Senior Managing Director, Stream)

- **1st Vice Chair** - Gerry Haggarty (President & CEO, SFE Energy)

- **1st Vice Chair** - Matthew Picardi (Vice President, Regulatory Affairs, Shell Energy, N.A.)

- **2nd Vice Chair** - Kevin McMinn (EVP, Mass Market Sales, Crius Energy)

- **2nd Vice Chair** – Becky Patrick (Vice President & General Counsel, Infinite Energy)



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Welcome to NEM's New and Prospective Members

Constellation NewEnergy

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Earth Etch LLC

Powervine Energy

Znalytics LLC



Conference Itinerary Day One

- **Keynote Speaker – Former FERC Commissioner, Mark Spitzer**
- **Presentation of Award for Achievement in Competitive Energy Markets**
- **2018 Retail Energy Markets**
- **Keynote Luncheon Addresses – Baltimore Mayor Catherine Pugh & President of WGL Energy Services and Systems, Sanjiv Mahan**



Conference Itinerary

Day One

- **Energy Choice 2.0: The Next Wave of Consumer-Driven Energy Market Openings (continued on Day Two)**
- **Energy Choice 2.0: Market Enhancements to Improve Consumer Engagement, Supplier Participation and Overall Market Competition (CEO Panel)**
- **VIP Reception**



Conference Itinerary Day Two

- **Keynote Speaker – Craig Glazer, VP, Federal Govt Policy, PJM**
- **Presentation of Public Service Award to FCC Commissioner, Mignon Clyburn**
- **Grid Resilience and Wholesale and Retail Energy Markets – featured speakers and roundtable participants**



Energy Choice 2.0

Status of Electric Restructuring

- 15 States and D.C.
- 16 million Residential electric customers migrated (as of 2016)* →

Status of Natural Gas Choice Programs

- 23 states and D.C.
- 7 million Residential customers migrated (as of 2016)**

* Source: Energy Information Administration and Public Utility Commission of Texas.

** Source: Energy Information Administration



Energy Choice 2.0

The Next Wave of Energy Market Openings

- Nevada – Energy Choice Ballot Initiative
- California – Customer Choice Project
- Florida – Electricity Market Initiative
- Virginia – Renewable Energy Offerings/Customer Demand Aggregation



Energy Choice 2.0

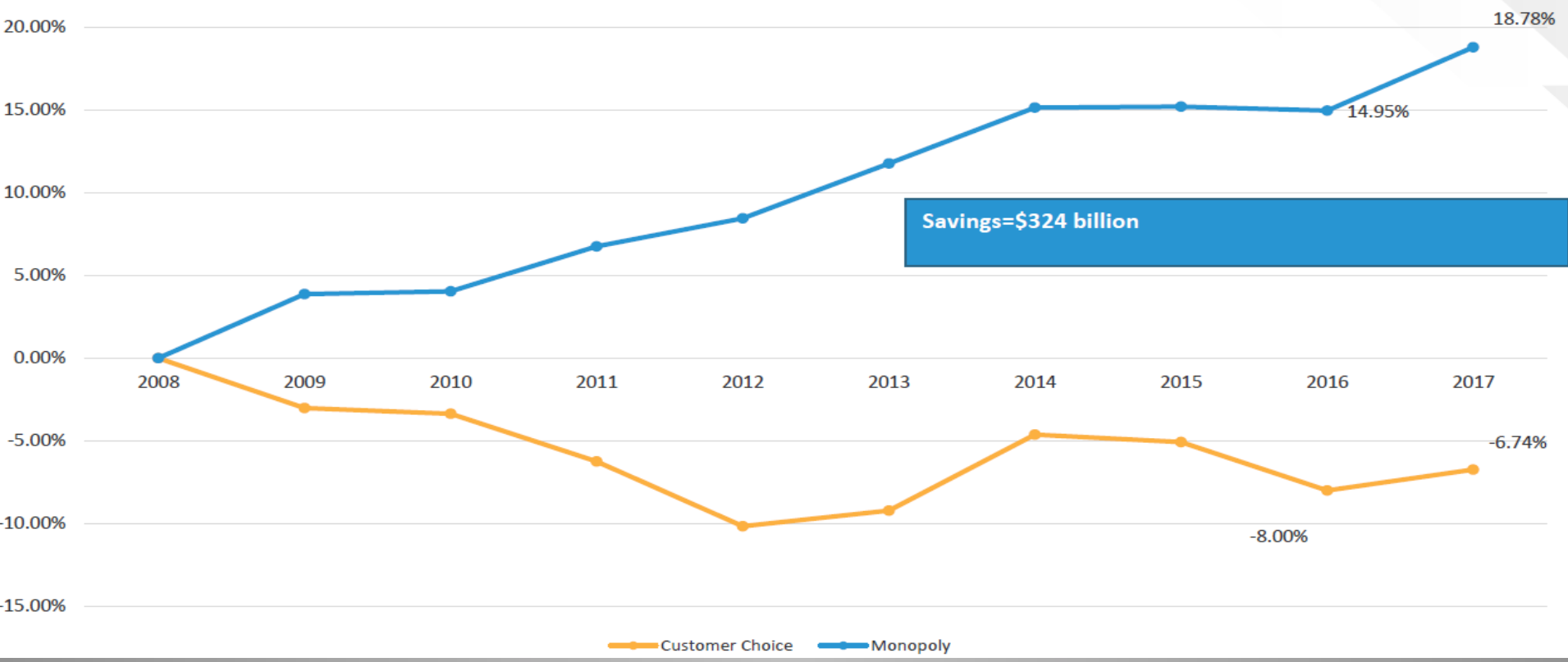
A New Era in Consumer Choice, Innovation and Opportunities

- **Access to Data – Timely/Granular/Billing Quality**
- **Supplier Consolidated Billing**
- **Expansion of POR and/or On-Bill Financing for Value-Added Services**
- **No Presumption of New Customers on Utility Default Service**
- **Facilitation of Customer Enrollment**
- **Valuation of Distributed Energy Resources (net metering, value of solar)**
- **Plug and Play Infrastructure for Market Participants**



Benefits of Retail Electric Competition

All Sector Weighted Average Price Change by Percentage, 2008-2017



Source: Study of The Perryman Group, commissioned by Florida Energy Freedom



Texas Inflation-Adjusted Comparison of Regulated and Competitive Rates (12 Month Fixed Price) (2017 Report)*

TDU Service Territory	Last Regulated Rate (2001), cents/kWh	Last Regulated Rate, Adjusted for Inflation	Current Lowest Fixed Price	Percentage Change
AEP Central	9.6	13.1	5.6	-57.25%
AEP North	10.0	13.6	5.0	-63.24%
Center Point	10.4	14.1	5.4	-61.7%
Oncor	9.7	13.2	4.5	-65.91%
TNMP	10.6	14.4	5.0	-65.28%

* PUCT Report, 2017 Scope of Competition in Electric Markets in Texas, page 4.



DEO SSO/SCO Retail Price Adjustment (per Mcf)

Source: PUCO Case Nos. 07-1224-GA-EXM, 11-6076-GA-EXM, 12-1842-GA-EXM

