



Tuesday, June 21, 2011 - 8:00 AM - 5:30 PM
Smart Lighting Value Chain Summit

- 8:00-8:15 *Chairperson's Remarks*
Chad Stalker, Regional Marketing Manager for the Americas, PHILIPS LUMILEDS LIGHTING COMPANY
- 8:15-8:45 *Keynote Address One:*
The White House's Better Buildings Challenge
In February President Obama announced a new initiative, the Better Building Challenge. The Challenge encompasses a number of thrusts, including:
- *New tax incentives for building efficiency*
 - *More financing opportunities for commercial retrofits (through the SBA, and a DOE pilot program making loan guarantees available to hospitals, universities, etc.)*
 - *Streamlining of state and local regulations via private new competitive grants*
 - *Improving transparency around energy efficiency performance*
 - *Launching a Building Construction Technology Extension Partnership*
- Mr. Hendricks is the Clinton Global Initiative coordinator with the White House on the Better Building Challenge, authored the book Apollo's Fire with Senator Jay Inslee, and has played a key role in formulation of cleantech policy in the current administration.*
- Bracken Hendricks**, Senior Fellow, CENTER FOR AMERICAN PROGRESS; Strategic Advisor, CLINTON GLOBAL INITIATIVE
- 8:45-9:15 *Keynote Address Two:*
California's Strategic Lighting Plan
According to a recent report by the California Public Utility Commission, "California can achieve a 60-80 percent reduction in statewide lighting energy use by 2020...This will require shifting incentives to encourage best practices, enhancing coordination among regulatory agencies and creating more effective financing mechanisms for lighting retrofits." Following on the heels of AB1109 ("the Huffman Bill") mandating energy cuts in lighting, CPUC and CEC are devising an ambitious, integrated strategy to pull all stakeholders into alignment to achieve these goals. The CEC in particular via Title 20 and Title 24 oversees lighting and building energy standards. This presentation will provide an inside

look at how California is pushing the frontiers of energy-saving advanced lighting.

Gary Flamm, Supervisor, Building Standards Development Unit,
CALIFORNIA ENERGY COMMISSION

9:15-9:45 *Presentation:*

Market Overview: Monetizing the Efficiency Values of Smart Lighting

This presentation will assess the overall size, segmentation, drivers and growth trends in intelligent lighting systems (LED and non-LED), addressing their collective potential to cut energy bills for property owners and tenants in commercial, retail, industrial and government facilities.

Murray McCutcheon, Analyst, LUX RESEARCH

9:45-10:15 *Networking Break*

10:15-11:30 *Panel Discussion:*

Rethinking Sales and Channel Strategies: Smart Lighting Driving New Realities

The advent of digital networking, wireless communications, solid state LEDs and smart grid enablement is upsetting the once stable and conservative lighting channel. The technical and engineering knowledge and processes required to sell, deploy and support these systems is dramatically different from those of older lighting technologies. Moreover, the push towards efficient use of energy, coupled with the decline of the new construction market during the economic recession, has heightened the importance of the lighting retrofit market. Yet this market is characterized by different selling propositions, solutions extending beyond just lighting, innovative financing models and new channel participants such as energy management companies and ESCOs. Sales strategies and distribution models that worked in the past may no longer be effective in today's market. This panel will bring together industry participants from various market segments (OEM sales, the specification market, the retrofit market) to provide vital perspectives on successful strategies and tactics for succeeding in this new smart lighting landscape.

Moderator:

Erik Birkerts, Partner, EVERGREEN GROWTH ADVISORS

Panelists:

Mike Feinstein, VP Sales and Marketing, DIGITAL LUMENS

Zach Gentry, Chief Strategy Officer & Co-Founder,
ADURA TECHNOLOGIES

Jeremy Stieglitz, VP Marketing, REDWOOD SYSTEMS

Danny Yu, CEO, DAINTREE NETWORKS, INC.

- 11:30-12:00 *Presentation: Case Study #1*
Advanced Lighting Retrofits at Cal State Campuses
Wesley R. Morgan, *Energy Program Manager, Capital, Buildings & Construction, THE CALIFORNIA STATE UNIVERSITY*
- 12:00-1:30 *Group Luncheon*
Luncheon Address:
CPUC's Policy Context for the Strategic Lighting Plan
Simon Eilif Baker, *Supervisor, Energy Efficiency Planning, Climate Strategies Branch, Energy Division, CALIFORNIA PUBLIC UTILITIES COMMISSION*
- 1:30-2:00 *Keynote Address #3:*
The Evolution of Smart Lighting Systems and Markets
Rusty McBride, *Manager, Business Development, PHILIPS LIGHTING*
- 2:00-3:30 *Panel Discussion:*
Indoor Lighting Specifier Panel: How Do Building End Users and Influencers View the Coming Revolution in Smart Lighting?
How do the energy/engineering, sustainability directors of major corporations, governments and franchises, as well as architects and contractors, view the competing benefits and options of smart lighting? To what extent is smart lighting advocated in utility efficiency programs? What are the success stories and challenges end users and specifiers have found? What kinds of energy-cost cutting effects are they seeing from implementation of networked, sensor-enabled lighting technologies? How do they evaluate the differing qualities of light from different technologies? What kinds of price points and capabilities are they looking for in the future?
- Moderator:*
Larry Morgan, *President, INTERNATIONAL FACILITY MANAGERS ASSOCIATION (IFMA) – SILICON VALLEY CHAPTER*
- Panelists:*
Peter Belisle, *President of Energy and Sustainability Services, JONES LANG LASALLE*
Richard Genece, *Manager Residential Portfolio Energy Efficiency Division, EDISON INTERNATIONAL*
Eugene Gutkin, *Principal, INTEGRATED BUILDING SOLUTIONS*
Charles Israel, *President, LIGHTING DESIGN ALLIANCE*
Wesley R. Morgan, *Energy Program Manager, Capital Planning, Design & Construction, THE CALIFORNIA STATE UNIVERSITY*
Kevin M. Powell, *Director of Research, Strategic Business Planning Division, Public Buildings Service, US GENERAL SERVICES ADMINISTRATION (US GSA)*
- 3:30-4:00 *Networking Break*

4:00-4:30 *Presentation:*
Quantifying the Energy Savings from Digital Lighting
Konstantinos Papamichael, Ph.D., *Professor, Design Program; Co-Director,* CALIFORNIA LIGHTING TECHNOLOGY CENTER (CLTC), UNIVERSITY OF CALIFORNIA DAVIS

4:30-5:30 *Panel Discussion:*
Implementing the Energy Savings Proposition of Smart Lighting
How are ESCOs and retrofit consultants assessing and specifying advanced lighting systems? How much demand for smart lighting comes directly from the customer and how much from the retrofit consultant? What role can smart lighting play in utility demand response programs? What kinds of new financing mechanisms will enable the expansion of smart lighting solutions? What kinds of efficiency finance mechanisms are applicable to Class B and C buildings – utility grants, municipal grants. What is the status with PACE financing?

Moderator:

Jonathan Livingston, *President,* LIVINGSTON ENERGY INNOVATIONS, LLC

Panelists:

Barry Giles, *CEO,* BUIDLING WISE LLC
BUILDINGWISE LLC

Michael Loth, *Director Lighting Strategy & Integration Energy Solutions, America,* JOHNSON CONTROLS INC.

Laura J. Manz, *Senior Vice President, Western Region,* VIRIDITY ENERGY, INC.

Matthew Nordan, *Partner,* VENROCK

6:00 - 7:00 *Summit Reception*

Wednesday, June 22, 2011 - 8:00 AM – 11:30 AM

8:00-8:30 *Presentation:*
What LEDs Bring to Smart Lighting...Beyond Being Another Semiconductor Component in the System
Chad Stalker, *Regional Marketing Manager for the Americas,* PHILIPS LUMILEDS LIGHTING COMPANY

8:30-9:45

Panel Discussion:

Gaps and Opportunities in the Smart Lighting Eco-System

This panel will offer a cross-section of supply chain vendors, from bulb or chip manufacturer, to driver module, to control system, to provide a sense of how the value chain for smart lighting is developing, where strategic gaps may exist, and opportunities for partnerships and investment.

Moderator:

Derry Berrigan, *Corporate Educator, Lighting Designer & Advocate*, LIGHT THINK STUDIOS, INC.

Panelists:

Rhonda Dibachi, *COO*, QNURU / NORIBACHI

Dr. Yi-Qun Li, *Exec VP, CTO and Co-Founder*, INTEMATIX

Kishore Manghnani, *Vice President of Communications and Consumer Business*, MARVELL

Jerry Mix, *President*, WATTSTOPPER

Sameer Vuyyuru, *Vice President & General Manager Advanced Communications & Sensing*, SEMTECH

9:45-10:15 *Break*

10:15-11:30 *Panel Discussion:*

Outdoor Lighting: What Kinds of Capabilities and Pricing are Customers Seeking?

The market for street lighting, parking lights and other outdoor area lighting has very different channels and end-user requirements than for buildings, while much of the technology is similar. Many cities and states are pushing for more efficient lighting systems, in spite of tight budgets. This panel will survey the lighting purchasers, public and private, and policy makers who influence purchasing decisions.

Moderator:

Greg R. Barry, *President and CEO*, TOPANGA TECHNOLOGIES

Panelists:

Andrea Denver, *Sr. Project Manager, Mass Market Energy Solutions & Service*, PACIFIC GAS & ELECTRIC COMPANY

Rick Kaufmann, *President*, KAUFMANN CONSULTING

Rick Leeds, *Manager, Specification Marketing*, ACUITY BRANDS, INC.

Edward Smalley, *Streetlight Engineering Manager*, SEATTLE CITY LIGHT; *Director*, MUNICIPAL SOLID-STATE STREETLIGHTING CONSORTIUM

11:30

Summit Concludes