





welcome pre-read

NEW MEXICO 2017





# welcome

to New Mexico and to our second annual e-Lab Summit — the most expansive convening hosted by Rocky Mountain Institute as part of our Electricity Innovation Lab (e-Lab). Over the next 48 hours, you'll be joining 150 fellow decision makers and practitioners from across the U.S. and around the world to advance the most critical questions we face in transitioning to a cleaner, more distributed, and more resilient electricity system.

As the name suggests, e-Lab is a laboratory, a forum for working together in the spirit of experimentation and co-creation. We will be addressing eight timely topics for transforming the electricity system through discussion “pods.” You have been invited to participate because you and your organization bring a unique perspective, critical expertise, and important resources to advance the concepts we will be working to develop.

This year's e-Lab Summit is designed to:

- Frame and advance actionable strategies to address the most pressing industry needs
- Support key individuals and teams to address and affect change
- Create and strengthen relationships amongst industry leaders and innovators to support meaningful action

e-Lab Summit is a unique event, but even more so a unique process. We invite you to be curious, to question your assumptions (and others'), to seek the unique perspectives of your fellow participants, and to critically and honestly assess the strengths and weaknesses of our collaborative work.

We wish you a productive three days and great success, both for work here at e-Lab Summit and beyond.

The e-Lab team



# agenda

## MONDAY OCT. 2ND

11:00 am / registration  
1:00 pm / kickoff  
2:00 pm / pod session #1  
3:30 pm / break  
4:00 pm / plenary  
5:00 pm / networking  
6:30 pm / dinner  
8:30 pm / optional activities

## TUESDAY OCT. 3RD

6:30am / optional activities  
7:30 am / breakfast  
8:30 am / plenary  
9:00 am / case clinics  
10:00 am / break  
10:30 am / pod session #2  
12:00 pm / learning sessions  
1:00 pm / lunch & paired walk  
3:00 pm / pod session #3  
5:00 pm / plenary  
6:00 pm / break  
7:00 pm / dinner  
8:30 pm / optional activities

## WEDNESDAY OCT. 4TH

6:30am / optional activities  
7:30 am / breakfast  
8:30 am / plenary  
8:45 am / shift & share  
10:00 am / break  
10:15 am / pod session #4  
12:00 pm / plenary close  
1:00 pm / adjourn

# logistics



**TRANSPORTATION** — You will be provided a complimentary Uber ride from the airport to the Tamaya Resort (specific instructions were emailed to you). Return shuttle service will be provided to the airport.

**REGISTRATION** — After checking in with the hotel, please proceed to our registration desk in front of the Tamaya Ballroom. Registration starts at 11 am.

**DRESS CODE** — e-Lab Summit is a casual event (think: jeans). Mornings and evenings will be chilly and some activities are outdoors, so please plan accordingly.

**PARTICIPANT CONTACT BOOK** — A full list of participants is included at the end of this document. We will be distributing contact information after the event.

**QUESTIONS** — For any logistics questions beforehand or en-route, please contact our event services company, Black Badger Events, [blackbadger303@gmail.com](mailto:blackbadger303@gmail.com) or (603) 714-0124.



# pod topics

Smart Heating Electrification

Infrastructure Planning and New Mobility

Blockchain and Transactive Energy

Rate Design Pathways

Value Stacking for DERs


**Distributed Grid Infrastructure**

Utility Business Model Pathways


LMI-Focused Utility Business

**your pod's  
pre-read  
is in next  
section**





# distributed grid infrastructure

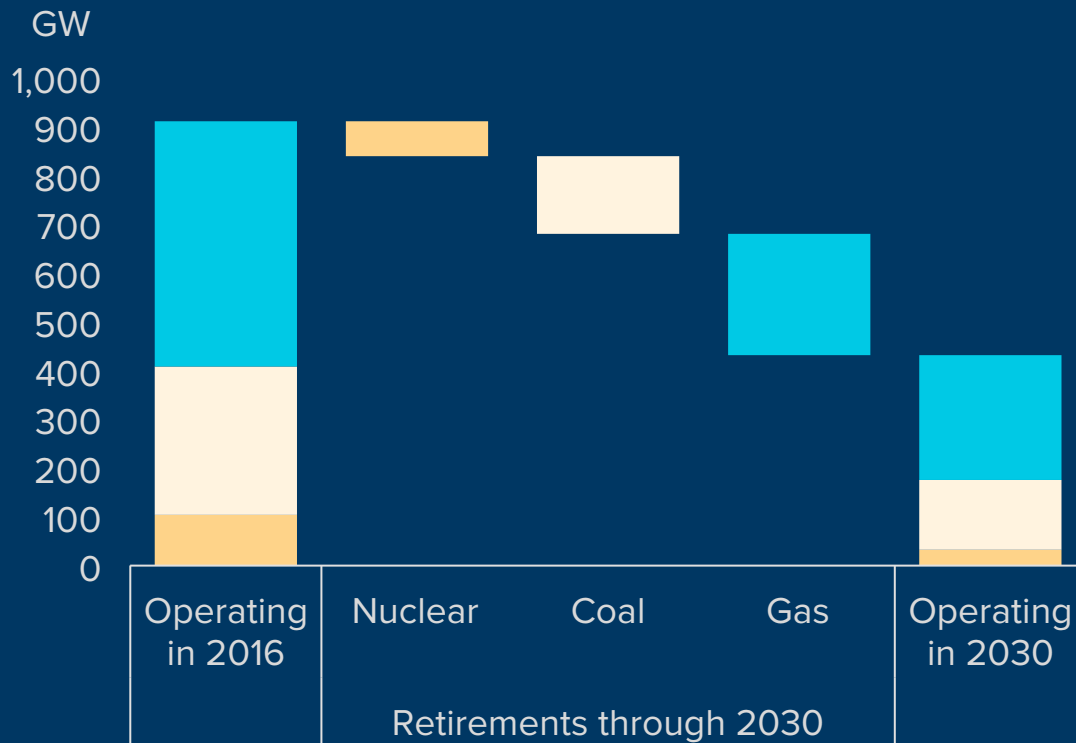


# topic overview



# the US grid is aging; approximately 50% of thermal capacity is likely to retire by 2030

Existing US thermal generating capacity:  
retirement outlook



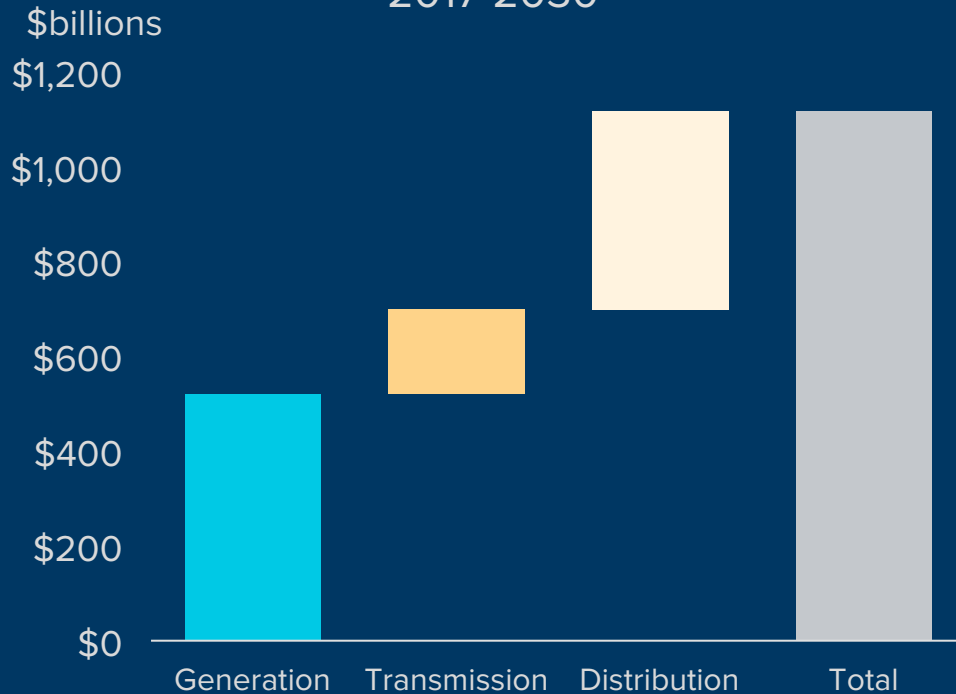
- Average US coal, natural gas, and nuclear capacity is >30 years old
- Approximately 50% of these units will reach unit type-average retirement ages by 2030:
  - Coal: 54 y
  - Nuclear: 45 y
  - Gas: 30-50 y

Source: RMI analysis of EIA data



# business-as-usual reinvestment would require >\$1 trillion in CapEx through 2030

Base-case US grid capital spending, 2017-2030

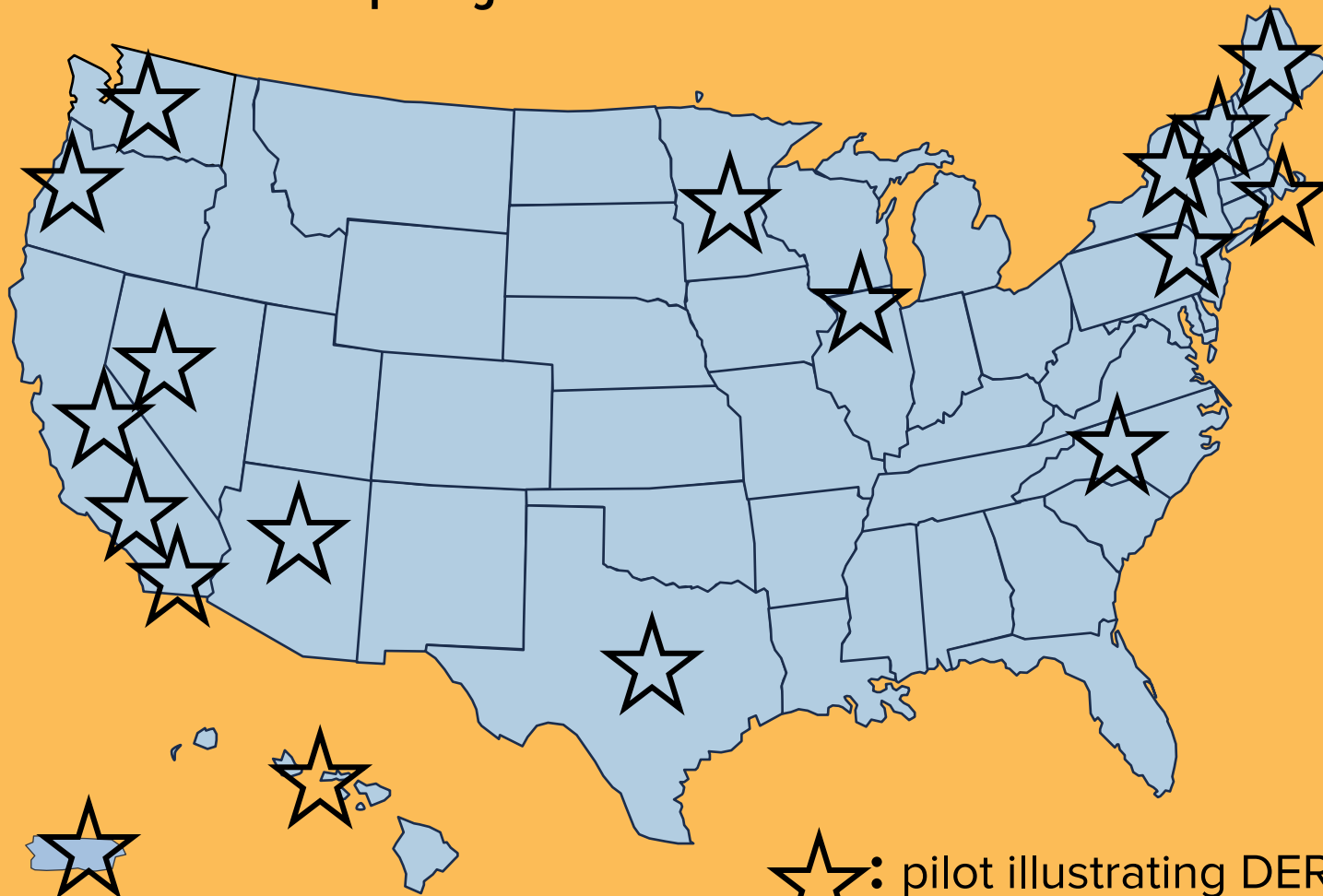


- Replacing retiring generators on a like-for-like basis would require ~ \$500B through 2030
- Forecasts of transmission and distribution investment need suggest a combined \$500-600B on network investment

Source: RMI analysis of EEI, SNL, IEA, EIA data

## DISTRIBUTED GRID INFRASTRUCTURE: CONTEXT

pilot and demonstration projects across the country are testing lower-cost alternatives to traditional infrastructure projects



Source: RMI; not an exhaustive list



# working definition:

## “Distributed Grid Infrastructure”

We use the term *Distributed Grid Infrastructure* (DGI) to mean portfolios of distributed energy resources (DERs) and utility-scale renewables that, integrated together, can complement, defer, or avoid traditional grid infrastructure investments (e.g., new gas-fired power plants, substation upgrades).

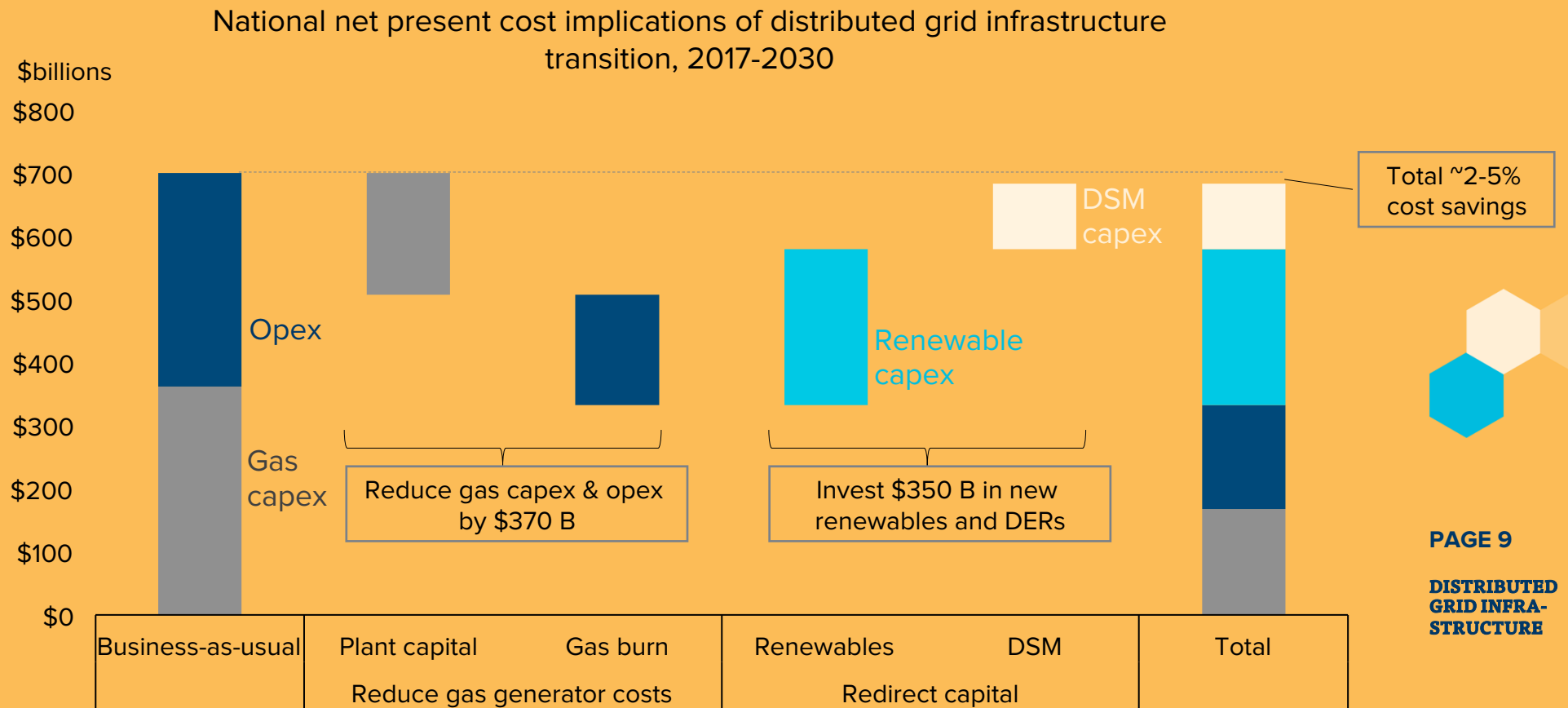
### Possible resources:

- Energy efficiency
- Demand response
- Distributed generation
- Thermal storage
- Battery storage
- Community-scale solar PV
- Utility-scale wind
- Utility-scale solar PV



**DISTRIBUTED GRID INFRASTRUCTURE: CONTEXT**

nationally, a DGI reinvestment pathway could unlock a ~\$350B market for DERs and renewables, at net cost savings



Source: Preliminary RMI analysis



# e-Lab Summit pod overview



# objectives and agenda

## Distributed Grid Infrastructure pod objectives

Our pod will foster collaboration and learning around the potential of DGI by exploring:

1. **The size and shape of the opportunity—where do DGI solutions make the most sense?**
2. **The specific barriers in the way—why isn't this happening at scale today?**
3. **Perspectives on solutions to pursue—how can the industry speed and scale progress?**

## High-level agenda of Summit pod sessions

1: Assessing the size of the prize

2: Identifying barriers to success

3: Understanding solutions

4: What's missing / what's next?

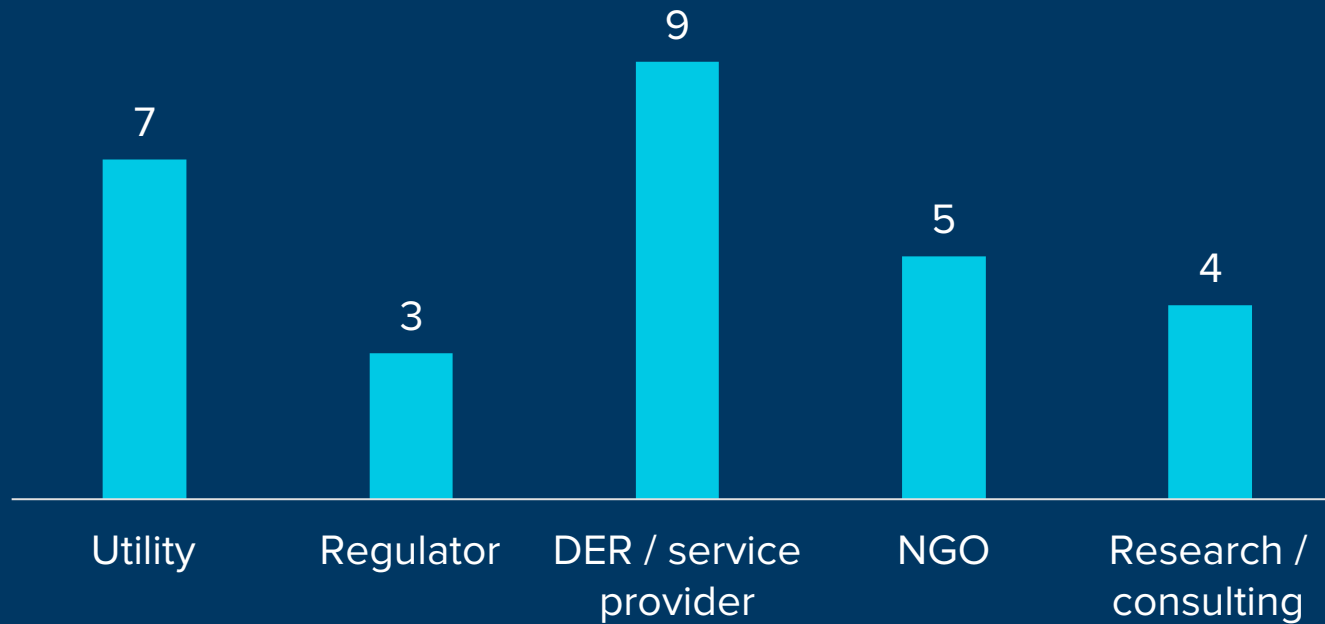
# participants

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- Jon Wellinghoff, Policy/DER Consulting
- Johanna Zetterberg, Department of Energy
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# survey results: industry role

Pod participants' role in electricity industry

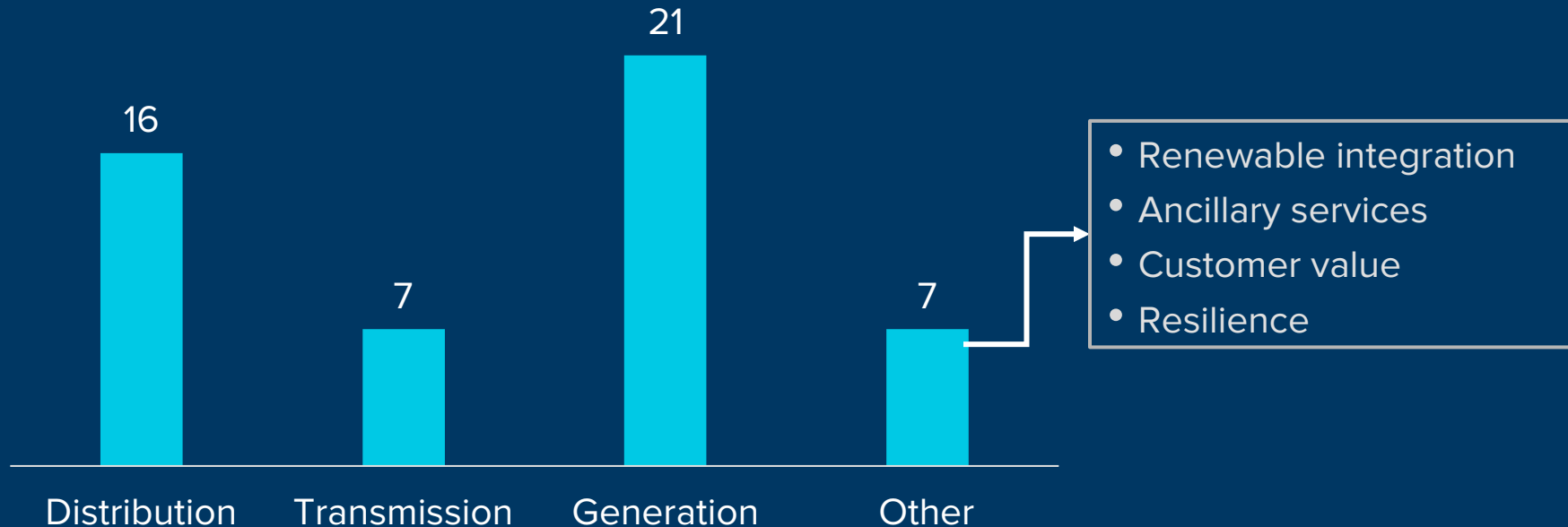






# survey results: opportunities for DGI

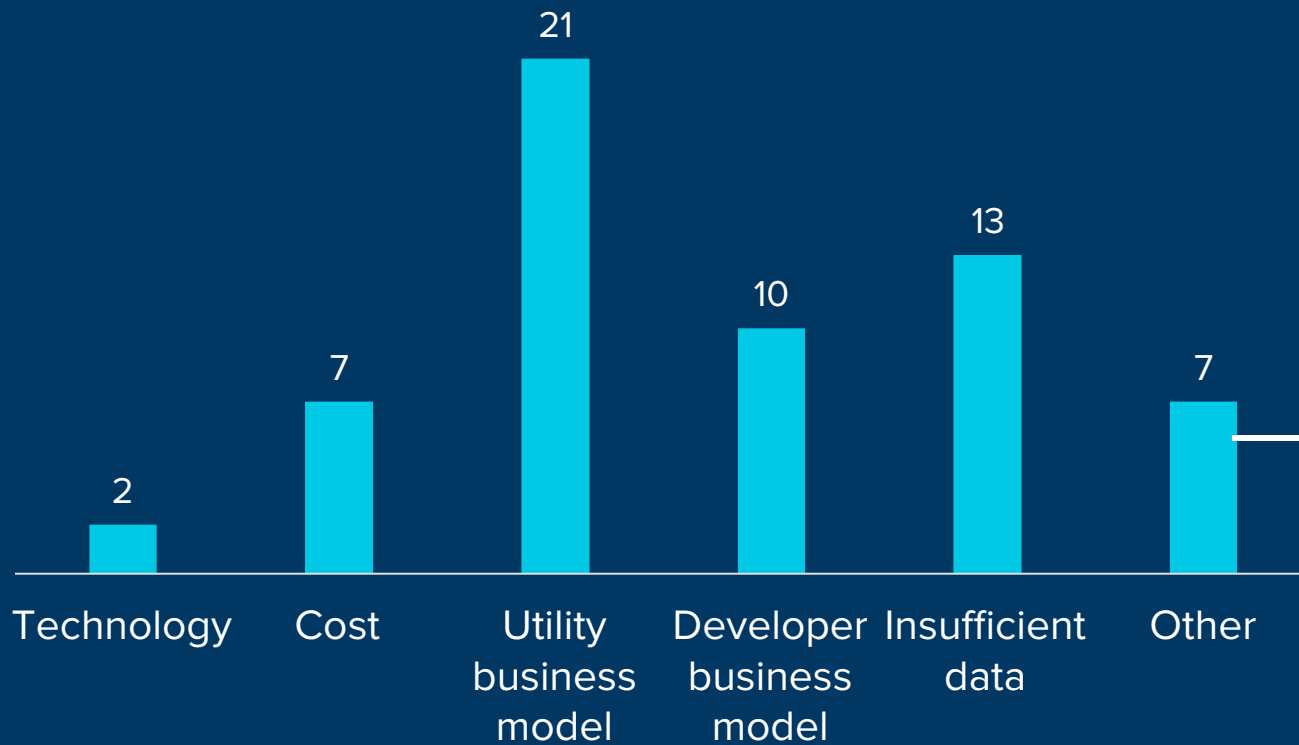
Most interesting opportunities for DGI





# survey results: barriers to DGI

Biggest barriers to scaling DGI



- Regulatory rules
- Lack of analytical tools
- Pricing signals
- Diversity in state goals





# survey results: priorities for Summit

## Common words in participant responses

applicable barriers best connect **DERs**  
development DG distributed energy  
future **help** ideas **industry**  
**learn** open others participants  
perspectives pilots planning plants  
power practices resources share solutions  
thinking **understand**  
**utility** virtual

### Common themes

- Connect with others
- Understand barriers
- Learn about solutions



# contact book



# blockchain and transactive energy

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# distributed grid infrastructure

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# infrastructure planning and new mobility

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mexico**



AN  
INITIATIVE  
OF

