Today’s Energy Management Challenge

Successful energy management today requires expertise in a wide variety of disciplines on both sides of the market-driven supply and demand equation.
Energy cost drivers for utilities and C&I customers

How you buy it

Possible Future Prices

How much you use

When you use it
Demand Response
How Demand Response Works

When the electric grid needs resources, PJM “dispatches” EnerNOC’s resources and thousands of facilities across nearly every industry reduce electricity consumption.
What Do We Do? - Demand Response Actions

Examples of Processes that EnerNOC Controls

- Air handlers
- Anti-sweat heaters
- Chiller control
- Chilled water systems
- Defrost elements
- Elevators
- Escalators
- External lighting
- External water features
- HVAC systems
- Internal lighting
- Irrigation pumps
- Motors
- Outside signage
- Parking lot lighting
- Production equipment
- Processing lines
- Pool pumps / heaters
- Refrigeration systems
- Water heating
Risk Management through Aggregation

Using a portfolio approach, EnerNOC can manage 100% of the risk of delivering firm capacity to its utility clients, while also eliminating risk for end-use customers.
The Benefits of Demand Response

- Earn Payments
- Protect Your Operation
- Protect Your Community
- Preserve the Environment
Addressing the Energy Management Challenge with Energy Intelligence
The Energy Management Challenge

The energy management opportunity represents billions of dollars a year to companies’ bottom lines.

1.5
Trillion dollars a year spent on energy by the US commercial sector = 10% of US GDP

285
Billion dollars spent on energy by the US commercial sector each year

85
Billion dollars wasted per year on energy by commercial companies each year

25
% of total commercial building operating expenses spent on energy

The Energy Management Challenge

The energy management opportunity represents billions of dollars a year to companies’ bottom lines.

1.5 Trillion dollars a year spent on energy = 10% of US GDP

465 Billion dollars spent on energy by the US industrial sector each year

116 Billion dollars wasted per year on energy by industrial companies each year

Making the leap from traditional EE to new technology in Energy Efficiency

- retrofits
- retro-commissioning
- audits
- performance
- time
- real-time meter data and baselines
- technology driven demand response
Benchmarking your organization

**Level 1**
Reactive
- Hot/cold calls
- Basic maintenance
- Budget uncertainty
- Decentralized decisions
- Fix known issues with services

**Level 2**
Spot Solutions
- Solving problems; Managing plants
- Procure Supply from open market where applicable
- Regular energy services schedule
- Utility bill management and basic reporting

**Level 3**
Proactive
- Set goals
- Robust reporting, using data to drive decisions
- Dedicated resources
- Reduce energy spend >15% vs Level 1 companies

**Level 4**
Best-in-Class Integrated Approach
- Set goals
- Manage Risk
- Drive down costs
- Integrate generation, supply, demand and efficiency
- Ongoing data driven decisions
- Energy and business decisions are interrelated
Turn energy intelligence into a competitive advantage

Drive energy savings by turning energy data into actionable capital and operating improvements.

**Tangible Results**
- kWh or BTU/sq. foot
- kWh or BTU/hour
- kWh or BTU/widget

- Occupant Comfort
- Productivity
- Energy Savings $
- Profitability
About EnerNOC

Proven Customer Track Record
• 6,000 C&I demand response customers across 14,000 sites
• 24,000+ MW of Peak Load Under Management, 30-35% is curtable.
• 2,000 C&I sites with active EfficiencySMART Insight deployments
• Over 500 active EfficiencySMART services projects
• Over $600 million in customer payments/savings to date
• Simple, risk-free commercial agreements

Full Value and Technology Offering
• Energy management application platform addresses demand and supply-side
• Combine technology, managed services, and market access
• More than $150 million invested to date in our technology
• 24/7/365 Network Operations Center, real-time metering and web-based monitoring

World-Class Team and Resources
• 700+ employees and growing fast – multiple “top places to work” awards
• Publicly traded on the U.S. NASDAQ (ENOC)
• $115 million in cash and cash equivalents on balance sheet