



NASEO

September 2015

Agenda

- 1 EnerNOC overview
- 2 Challenges facing energy policymakers
- 3 Our approach to solving today's challenges

EnerNOC is a NASDAQ-listed Energy Intelligence Software company with a proven track record



Strong Financial Profile

- 2014 Revenues: \$472M
- \$150M in cash/cash equivalents on balance sheet
- Publicly traded on the NASDAQ (ENOC)
- 1,200+ employees and growing

Full Value & Technology Offering

- Combines technology, managed services, and market access
- ~\$200M invested to date in technology

Proven Customer Track Record

- Thousands of enterprise customers across over 35,000 sites
- Over \$1B in customer savings delivered to date
- Market leader in demand response

We are seeing five challenges emerge across diverse geographies for state energy policymakers

1

Managing high costs

- Reducing state government energy spend
- Enabling state economic competitiveness through low cost energy policy

2

Clean Power Plan

- Reducing emissions and preserving reliability in a low cost-manner

3

Customer Engagement

- Engaging customers that have been difficult to reach in the past – especially the “frozen middle” small and medium enterprises

4

Leveraging AMI deployment

- Showing customers the value of their smart meter through clear and actionable data

5

Grid Reliability

- Managing the proliferation of distributed energy resources

Policy drivers that enable intelligent efficiency



Set aggressive goals for overall usage and cost at state facilities



Develop a holistic approach to intelligent energy management, to drive cost efficiencies, not just energy efficiency



Fund broader EE efforts by participating in demand response markets



Participate in open commodity markets

EIS provides an energy management platform for customers and a customer engagement platform for utilities



Customer engagement

45% higher participation in utility programs



Reduce cost to serve

More efficient communications: 2x increase in open rates; 10x increase in click-through rates

Lower cost energy procurement



Manage demand

Billions of dollars in savings delivered



kWh savings

1-3% savings for select SME verticals

Commercial, government and industrial customers directly purchase our EIS, allowing them to properly manage energy costs



How you buy it

- 1 Budgets and Procurement (e.g., auction)
- 2 Utility Bill Management (UBM)



How much you use

- 3 Visibility and Reporting
- 4 Facility Optimization
- 5 Project Tracking



When you use it

- 6 Demand Response
- 7 Demand Management

EnerNOC provides EIS and procurement to several state and local governments



Massachusetts



New Jersey



Connecticut



Pennsylvania



Delaware



Maryland

Customer Spotlight: Massachusetts Dept. of Energy Resources



“Measuring energy performance for all fuel types in real time, the project will quickly and accurately reveal patterns and pockets of inefficiency that exist even in the best-run buildings.”

Ian Bowles, *Energy and Environmental Affairs Secretary*

Customer Since 2010

Industry

State government (DOER)

Number of buildings

470

Types of buildings

Office buildings, colleges, prisons

Energy spend monitored

\$60M

Key Results

- \$2,600,000 in total savings from low/no cost savings measures
- Ability to do charge-backs for multi-site organizations, like campuses

Massachusetts deploys
EnerNOC software to over 17
MM square feet of state-owned
buildings

Finds over \$2,600,000 in low/no-cost savings;
total energy spend down \$5M since deployment

We have developed partnerships with key players in the energy ecosystem, as the software layer to integrate all the pieces

Distributed Energy Resources



Tariff Engine



Occupant Engagement



Controls





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