## EnerNOC is the C&I Demand Response and Energy Management Leader

### Market Leadership
- Based in Boston, Massachusetts
- 700+ employees; approximately 400 in Boston
- Incorporated in 2003; Initial Public Offering in 2007
- Between 24,000-27,000 MW of Peak Load Under Management (~30-30% curtailable)
- Rapid growth: 1,308 C&I sites at IPO → ~13,700 at December 31, 2012
- Responded to over 350 demand response dispatches in 2012 alone

### Financial Strength
- 1.6Bln\(^{(1)}\) contracted revenue backlog
- Long-term contracts provide strong visibility
- Favorable pricing trends in largest market (PJM) for next three years
- $115m cash & equivalents

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\(^{(1)}\) As of June 1, 2012, we estimate our total contracted revenue to be approximately $1.6 billion, 90% of which we expect to earn and recognize as revenue by May 2016.
EnerNOC’s Global Demand Response Footprint

• We are active in every open DR market in North America with additional bilateral programs in multiple utility service territories.
C&I Customers of All Types

- We work with a breadth of C&I end users – from cold storage facilities to plastics injection molding companies, universities and hospitals.

- We identify the non-essential electricity use at these facilities and work with the onsite energy manager to maximize the value of demand response.
Buildings are no longer “sinks”, they can be “faucets”!

- Buildings in the U.S consume about 60% of the non-transportation energy
- Through energy efficiency (EE) and demand response (DR) buildings can be used to moderate or change load growth and therefore the need for new electric infrastructure.
- Through DR, buildings can give system operators another tool for managing grid reliability, again delaying the need for new infrastructure.
- The difference between DR and EE
Using DR for capacity

- Typically, about 10% of system costs are due to demands that occur fewer than 1% of the time. DR is a more efficient solution than building new generation that sits idle for 99% of the year.
EE is Transforming but Requires Vigilance!
“Energy doesn’t call in the middle of the night and tell you that it’s getting wasted.”

Chris Powell
Director of Sustainable Energy Initiatives
Brown University
(Answering the question: “Why EnerNOC?”)
How to Remain Vigilant

Go beyond monitoring. EfficiencySMART Insight collects energy data, combines it with external variables such as weather and rate information, and provide customers with actionable energy efficiency measures and the ability to measure and verify the results.

#1 Real-time Metering:
Data collection and aggregation

#2 Energy Monitoring:
Web-based energy data visualization

#3 Analyst Support:
Data analysis, recommendations, and assistance
"The Enterprise Energy Management System is among the most innovative endeavors the Commonwealth is pursuing with federal stimulus dollars."

IAN BOWLES
SECRETARY OF ENERGY AND ENVIRONMENTAL AFFAIRS
Mass DOER Insight Overview

33 Facilities

410 Buildings

17 Million Square Feet

1150 Sub-meters

500 Electric

250 Natural Gas

155 Fuel Oil

200 Steam

25 Chilled Water

20 Renewable
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