EnerNOC Company Overview

Luncheon at Washington University in St. Louis
Department of Energy, Environmental, & Chemical Engineering
September 18, 2013
About EnerNOC

- EnerNOC stands for Energy Network Operations Center
- EnerNOC (NASDAQ: ENOC) helps commercial, institutional, and industrial (C&I) organizations use energy more intelligently, pay less for it, and generate cash flow that benefits the bottom line through our complete suite of energy intelligence software and solutions including:

  - **DemandSMART**: Helping thousands of facilities reduce their energy usage during periods of peak demand to provide a capacity resource and stabilize the electric grid.

  - **EfficiencySMART**: Delivering continuous energy savings through data-driven energy intelligence and energy management expertise.

  - **SupplySMART**: Providing consultative expertise in energy markets, billing, contracts, and risk management strategies

  - **Utility Solutions**: Offering all of the above services for C&I customers as a third party contractor on behalf of utilities, as well as providing utilities with planning, technical, and evaluation consulting services.
The Grid Operator’s Challenge

Very inefficient for the last 10% of generation capacity to run only 50-100 hours per year

Annual Electricity Demand As a Percent of Available Capacity
DemandSMART

Instead of “peaking generators,” pay customers to reduce energy demand during peak periods.
**EfficiencySMART**

Networked electric meters and web portals give organizations direct visibility into energy usage, energy spend, and “hidden” savings opportunities.
SupplySMART

Energy price and risk mitigation for customers. Since 1995, energy prices have become much more volatile. Future prices are uncertain – creating both risk and opportunity.

US Natural Gas Prices (1985 to Present)

![Graph showing US Natural Gas Prices from 1985 to Present](chart.png)

- **Possible Future Prices**
  - **Age of Tranquility**
  - **Age of Volatility**
Utility Solutions

EnerNOC is focused on partnering with utilities to identify, evaluate, and implement solutions to their specific demand-side management program challenges. With decades of DSM program implementation and consulting experience, we are helping utilities worldwide successfully engage their business customers in demand response and energy efficiency programs.
A History of Rapid Growth

By way of comparison, the largest power plant in the World is the Three Gorges Hydroelectric Dam in China at 18,460 MW

Key Impact Stats as of September 2013:

- $663,265,612 Dollars Saved
- 17,166,675 Tonnes of CO₂ Saved
- 59,496,824 MB Data Streaming into Our NOC
- $15,000,000,000 Energy Spend Under Management
- 24,000-27,000MW Peak Load Under Management
Thank You!

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