

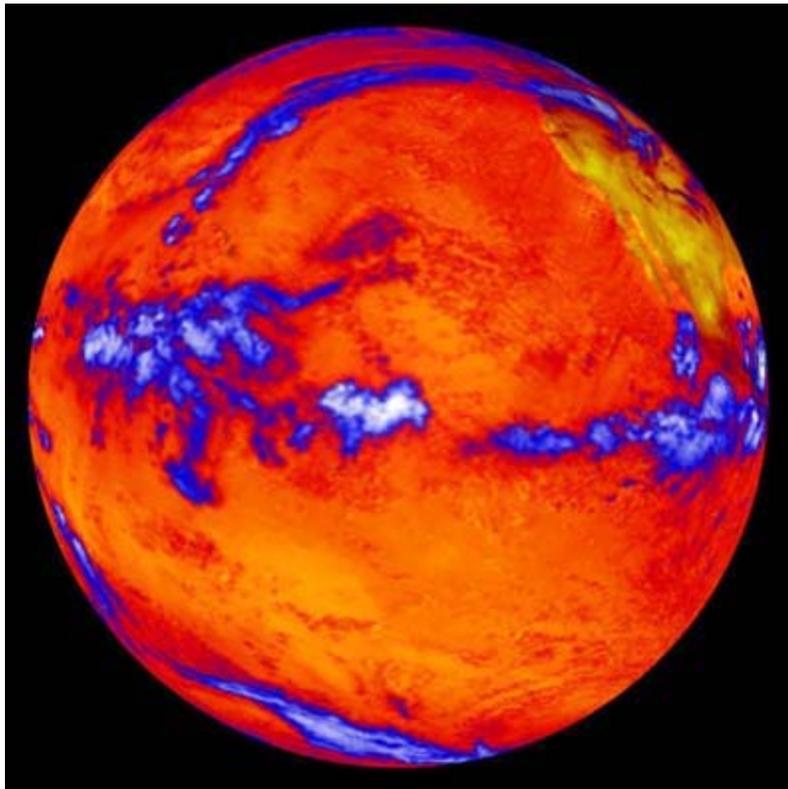


The State of the National Energy Efficiency Industry

Jim Grevatt

EPA Water and Energy Program Partnerships Workshop
Chicago, IL
March 5, 2008

THE GLOBAL IMPERATIVE



An 80% reduction in CO₂ by 2050 will require that we take action now to:

- Maximize energy efficiency
- Massively reduce use
- Maximize renewable energy supply

ACCELERATION IS UNDER WAY

More states

More utilities

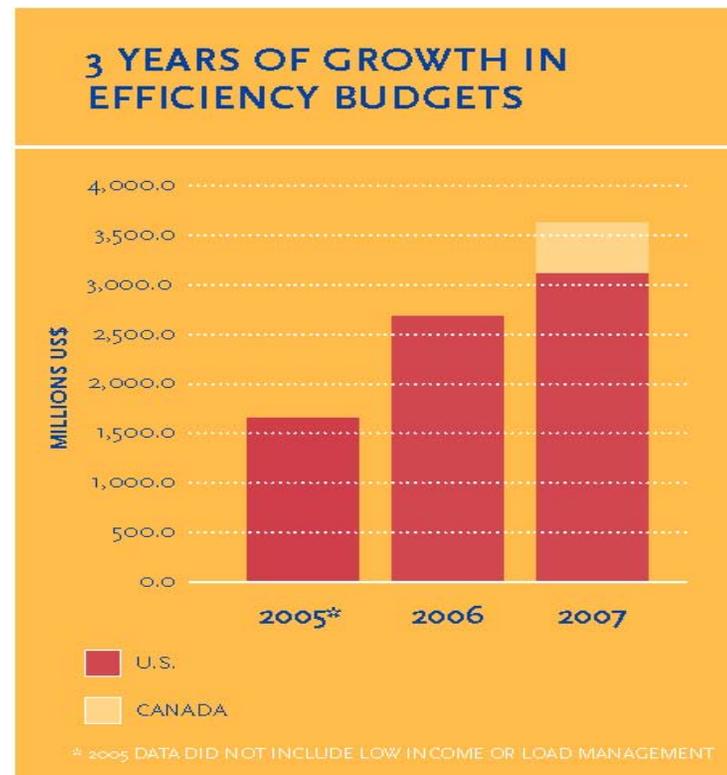
More programs

Higher funding

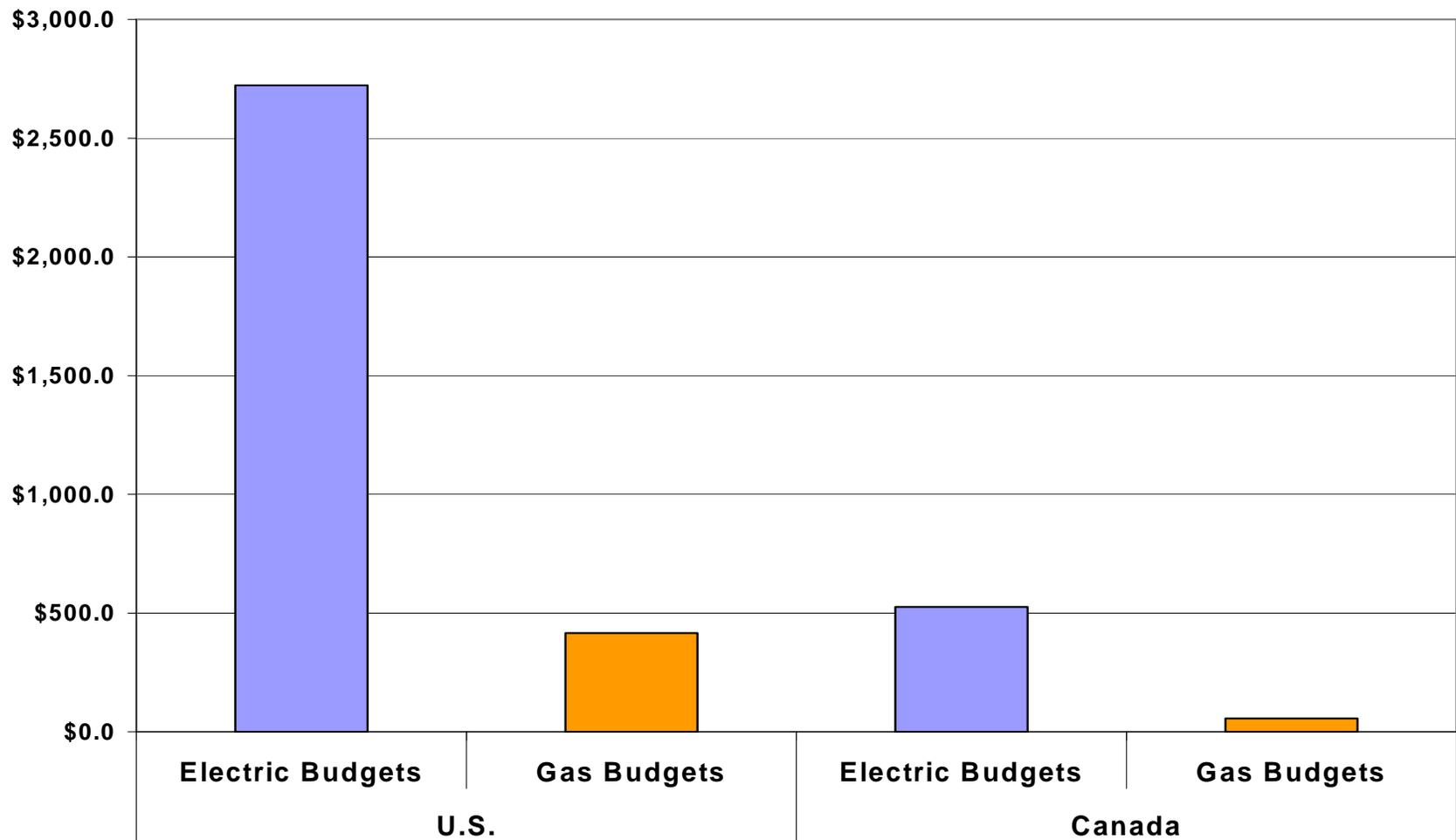
Higher expectations

U.S. budgets are up 18% since 2006

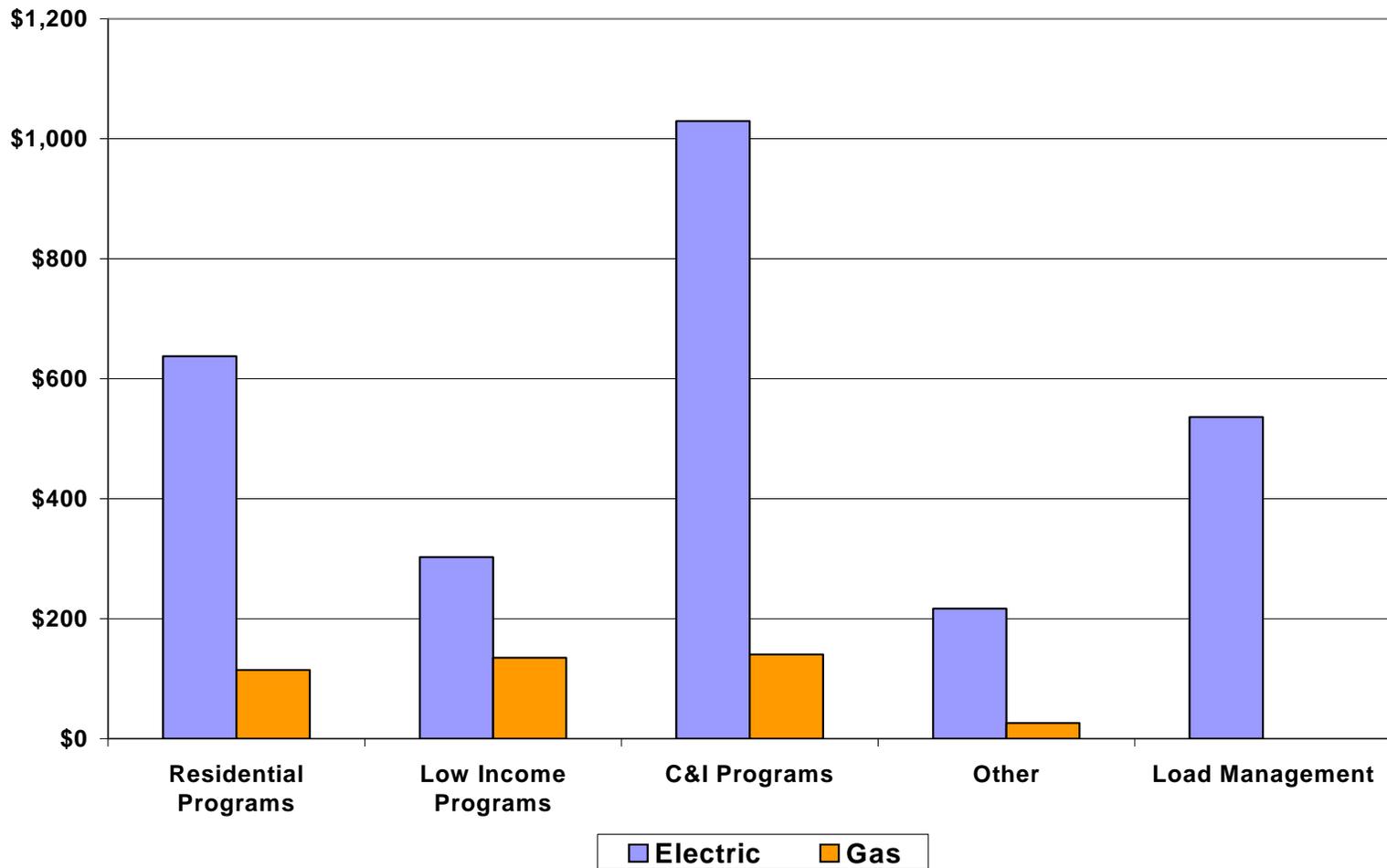
2007 Total Budget:
\$3.7 Billion



Budgets are dominated by electric programs



\$1.2 B of US budgets are for C&I



Combined U.S. & Canadian Savings

Electricity: 59,800 GWh

- Enough to power 4.5 million homes with electricity for a year

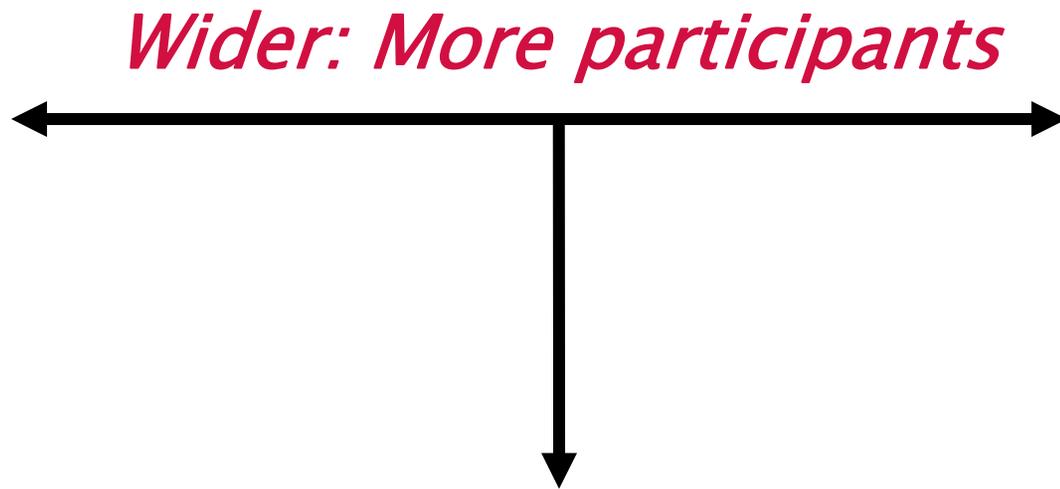
Gas: 162.6 million therms

- Enough to provide 100,000 homes with gas for a year

Total retail value: \$5.4 Billion

THE STRATEGIC IMPERATIVE

We all must get more out of our programs

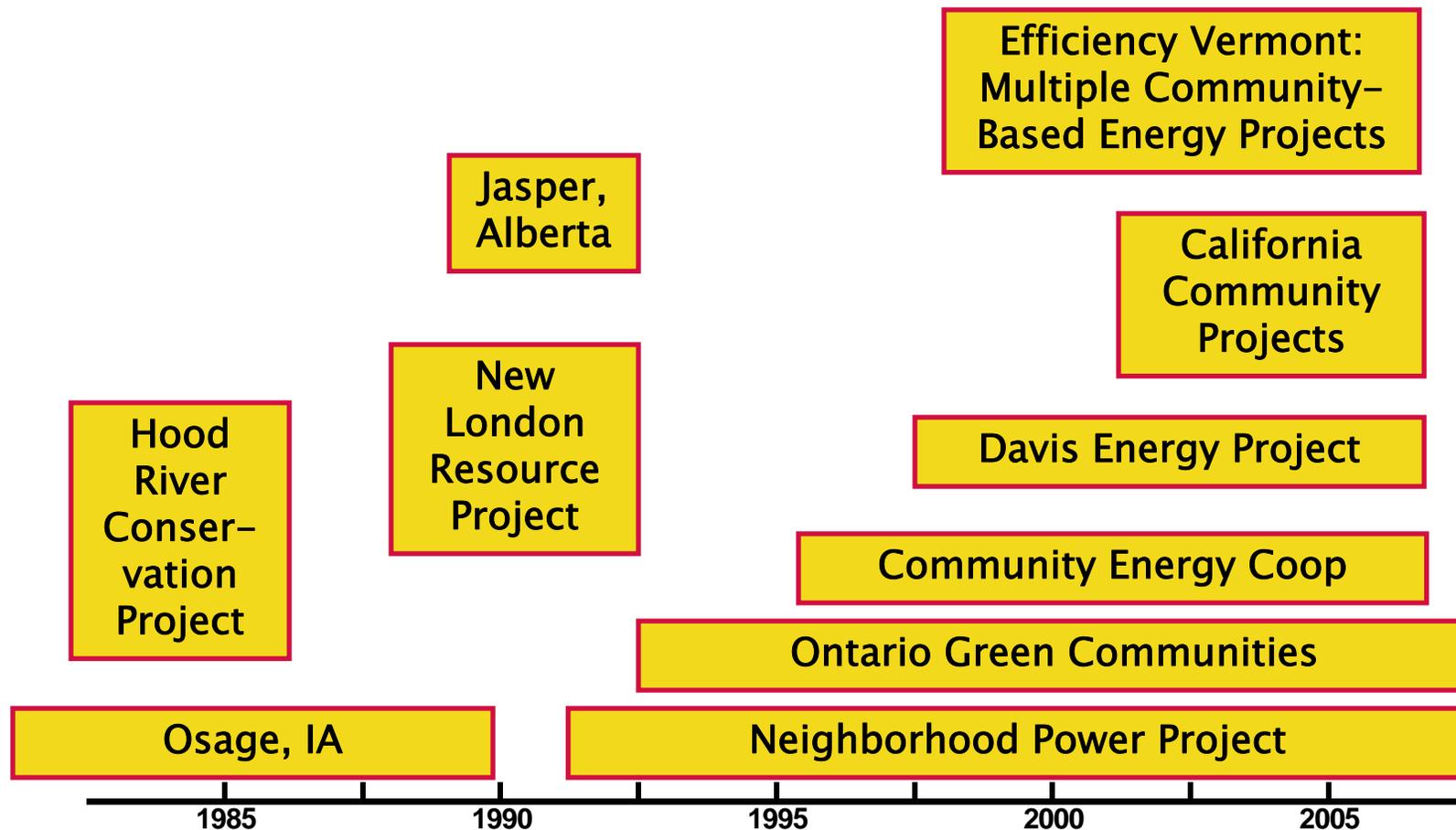


Wider: More participants

Deeper: More savings per participant



COMMUNITY-BASED ENERGY PROJECTS



GOING WIDER: NEW MARKETS

Solid-state lighting and beyond



Data centers and servers



Consumer electronics



Advanced water heaters



Niche industrial process markets



Micro - C H P



“One size fits all” goes only so deep

More *custom* approaches

for sub-markets and niche markets

More *comprehensive* approaches – bundles of measures

More *customer focus* –account management

WHAT DO WE NEED TO DO?

Barrier is not *technical* or *economic* –

It's INFRASTRUCTURE

MORE INTEGRATION



Integration with
all fuel types



Integration with
renewables



Integration
with water

WHAT DO WE NEED TO DO?

- Leverage our collective resources
- Identify partnership opportunities
- Offer integrated programs
- Meet the needs of end users

WHAT DO WE NEED TO DO?

- Get Started Now!

Thank you!

Jim Grevatt

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