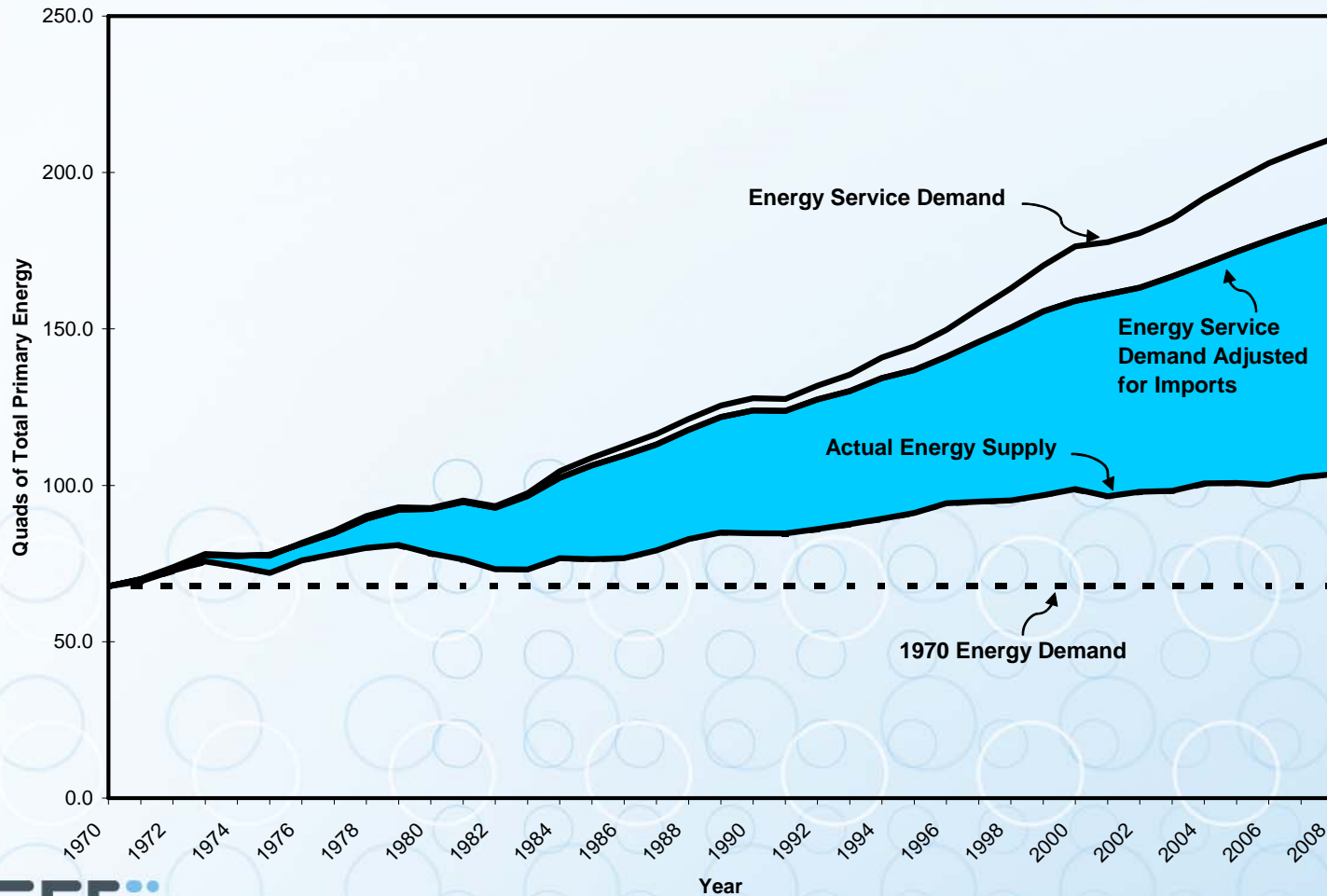


# Utility Sector EE: Big Successes, Giant Challenges Ahead

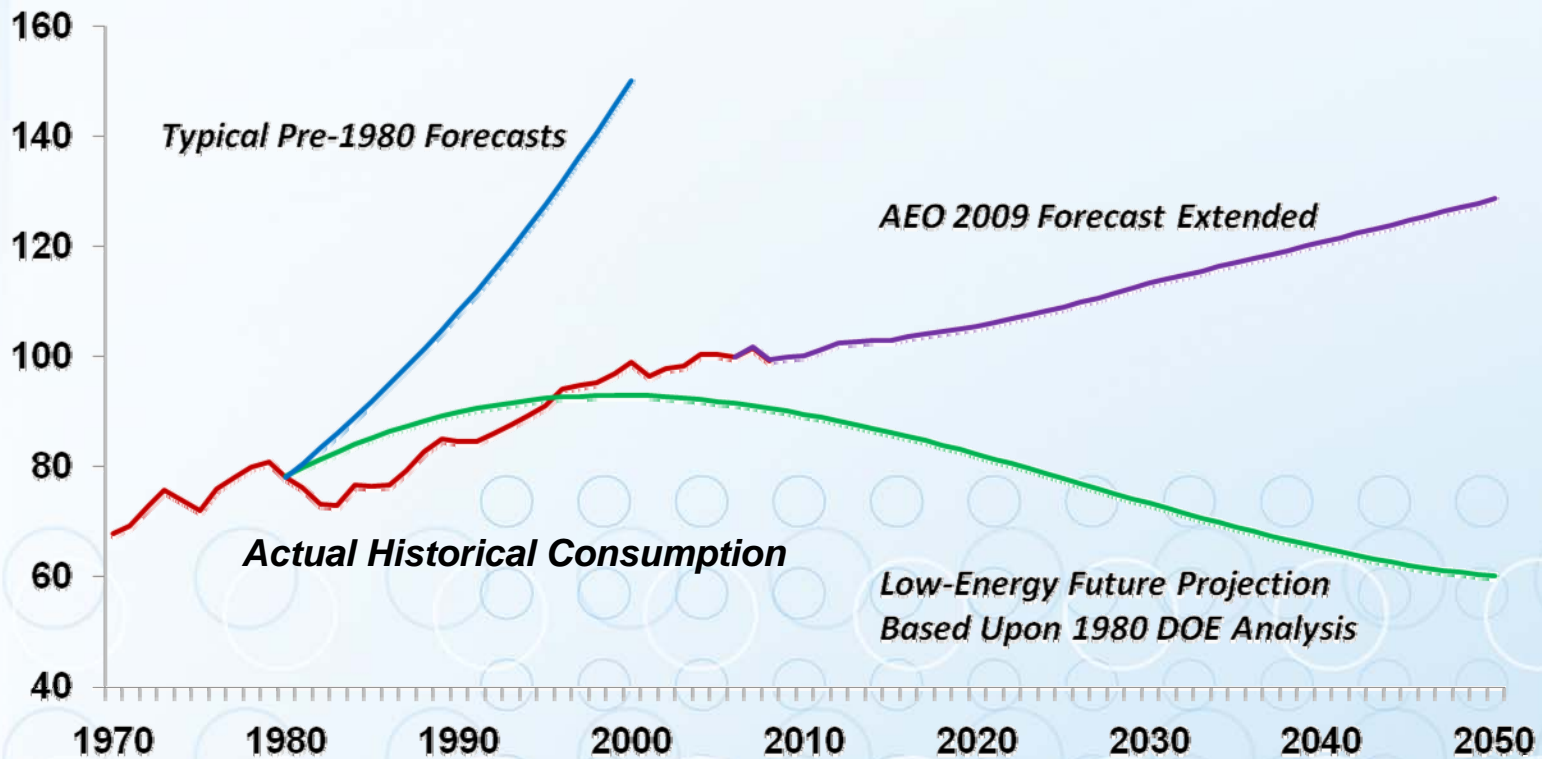
Steven Nadel  
American Council for an  
Energy-Efficient Economy  
September 2009



# U.S. Energy Use in Relation to GDP 1970-2008

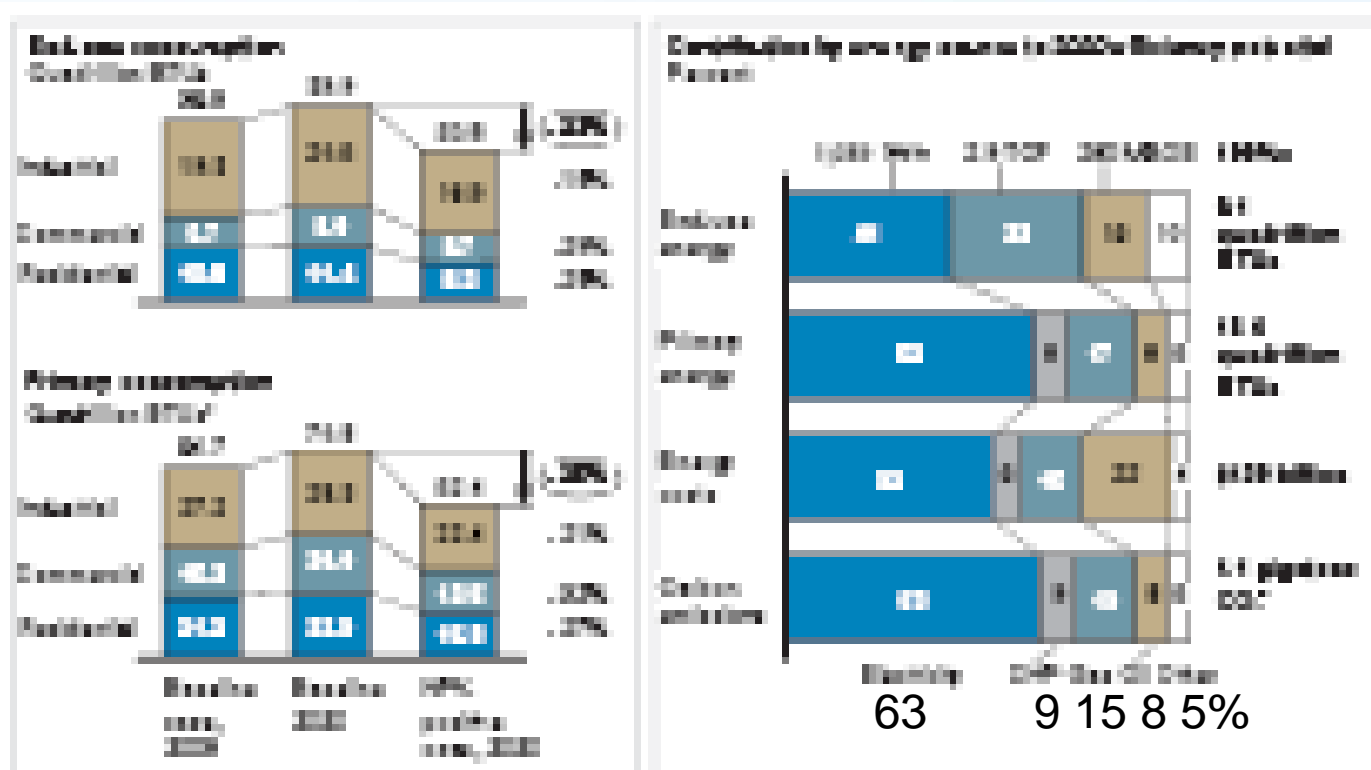


# Comparing Historical Energy Projections With Actual Outcomes and Future Targets



Source: DOE 1980 Policy Analysis, AEO 2009, and ACEEE estimates 2009

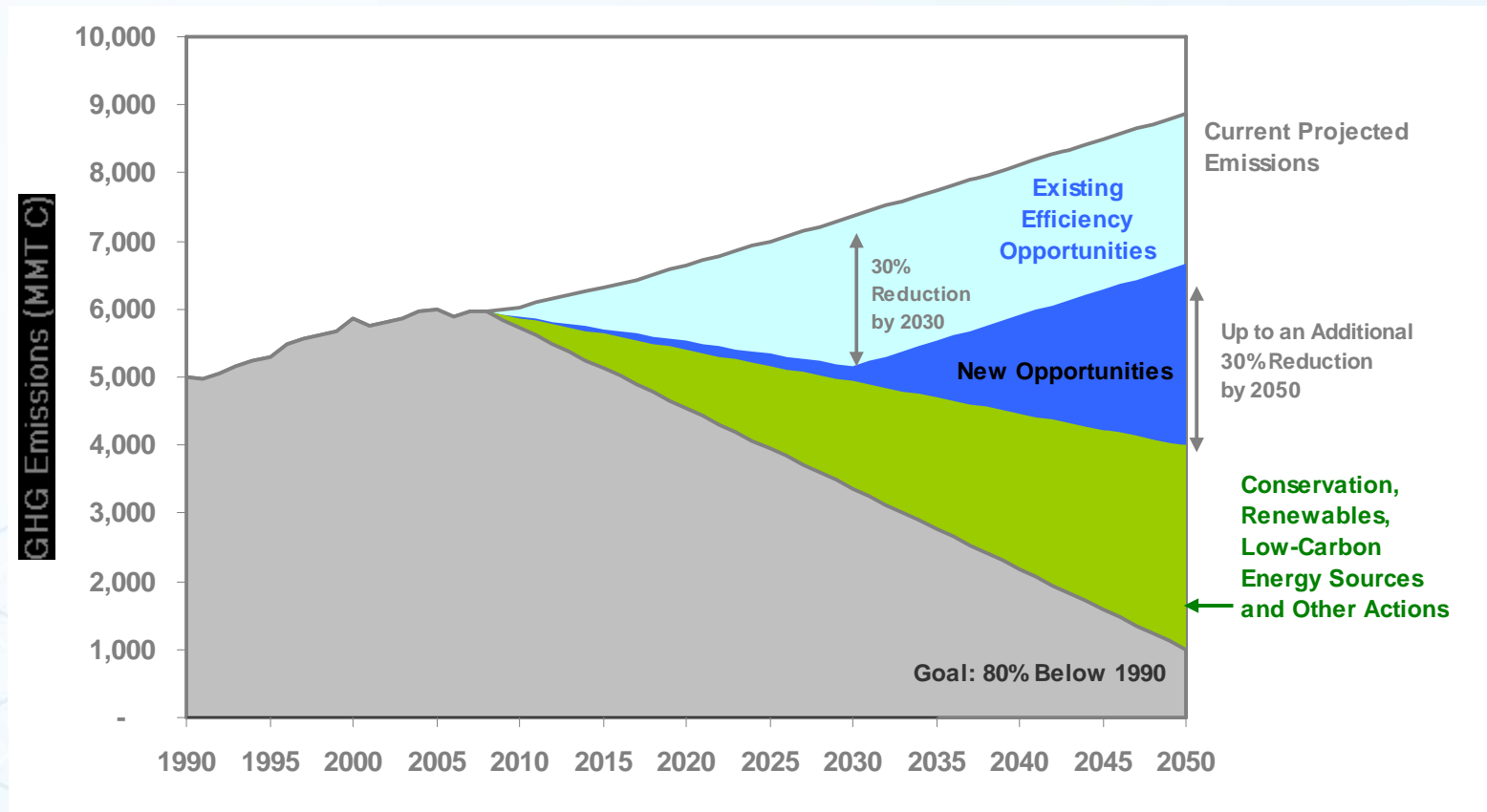
# McKinsey 2009 U.S. Efficiency Study: 26% primary EE savings relative to BAU



\*Includes primary savings from CHP at 100-million Btu for commercial and 10-million Btu for industrial

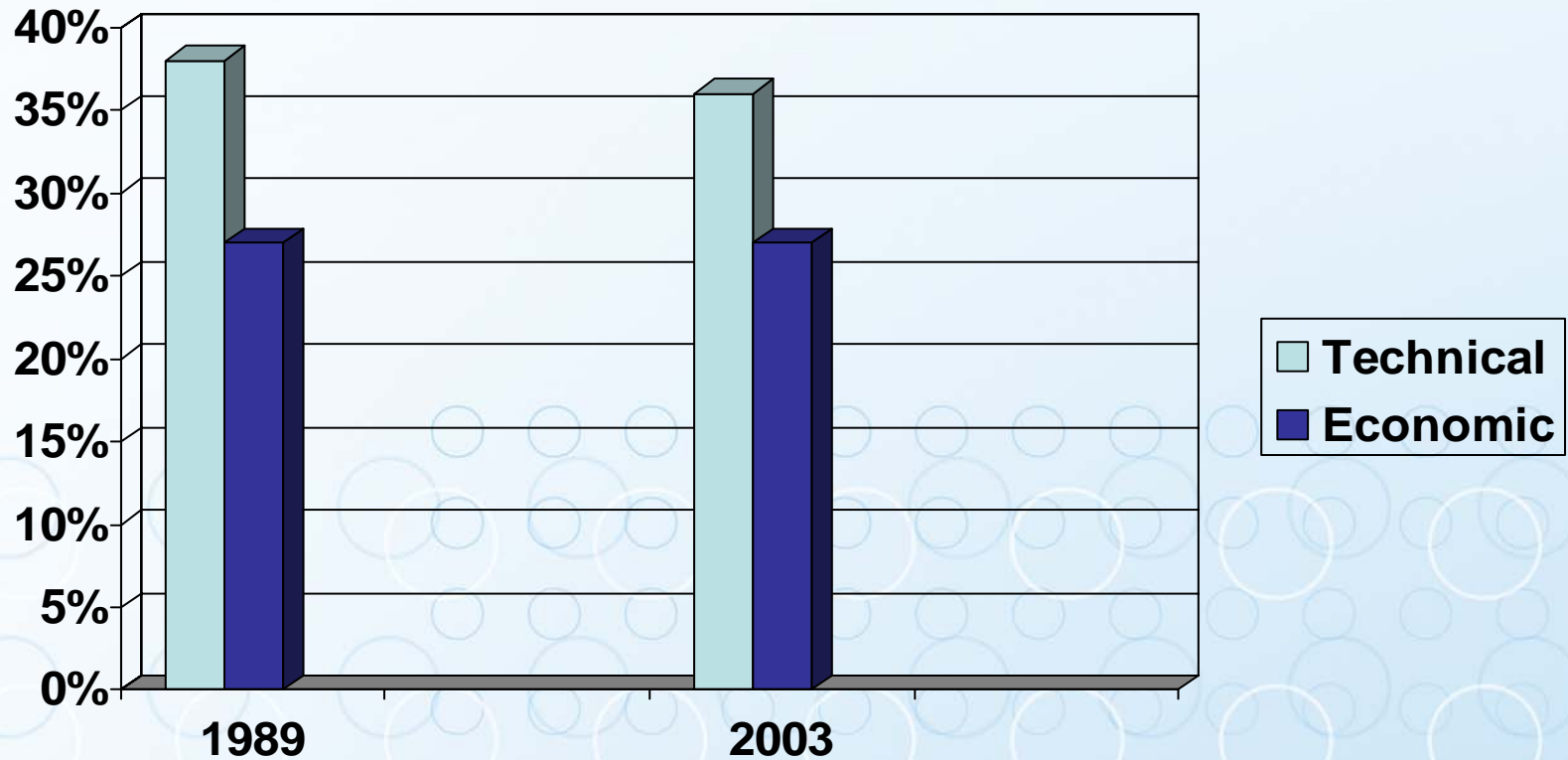
Source: EIA, AEC-CEE, McKinsey analysis

# Role of Efficiency in Addressing Climate Change in the U.S.



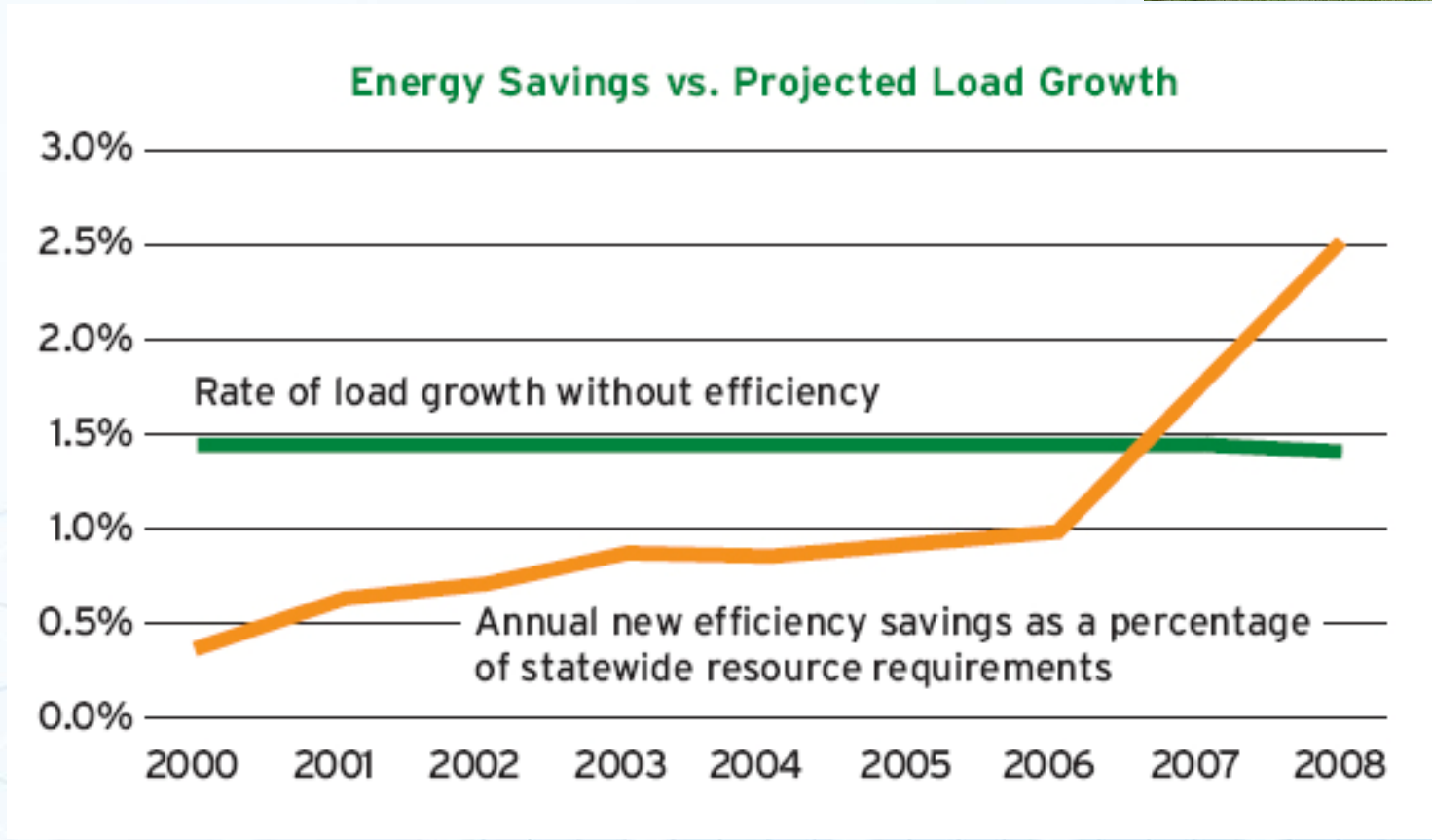
Note: This graph is stylized and is not exact.

# Comparison of Economic Potential in NYS – 1989 vs. 2003



Source: ACEEE 1989 and Optimal Energy 2003 analyses.

# Vermont – Raising Efficiency to a New Level



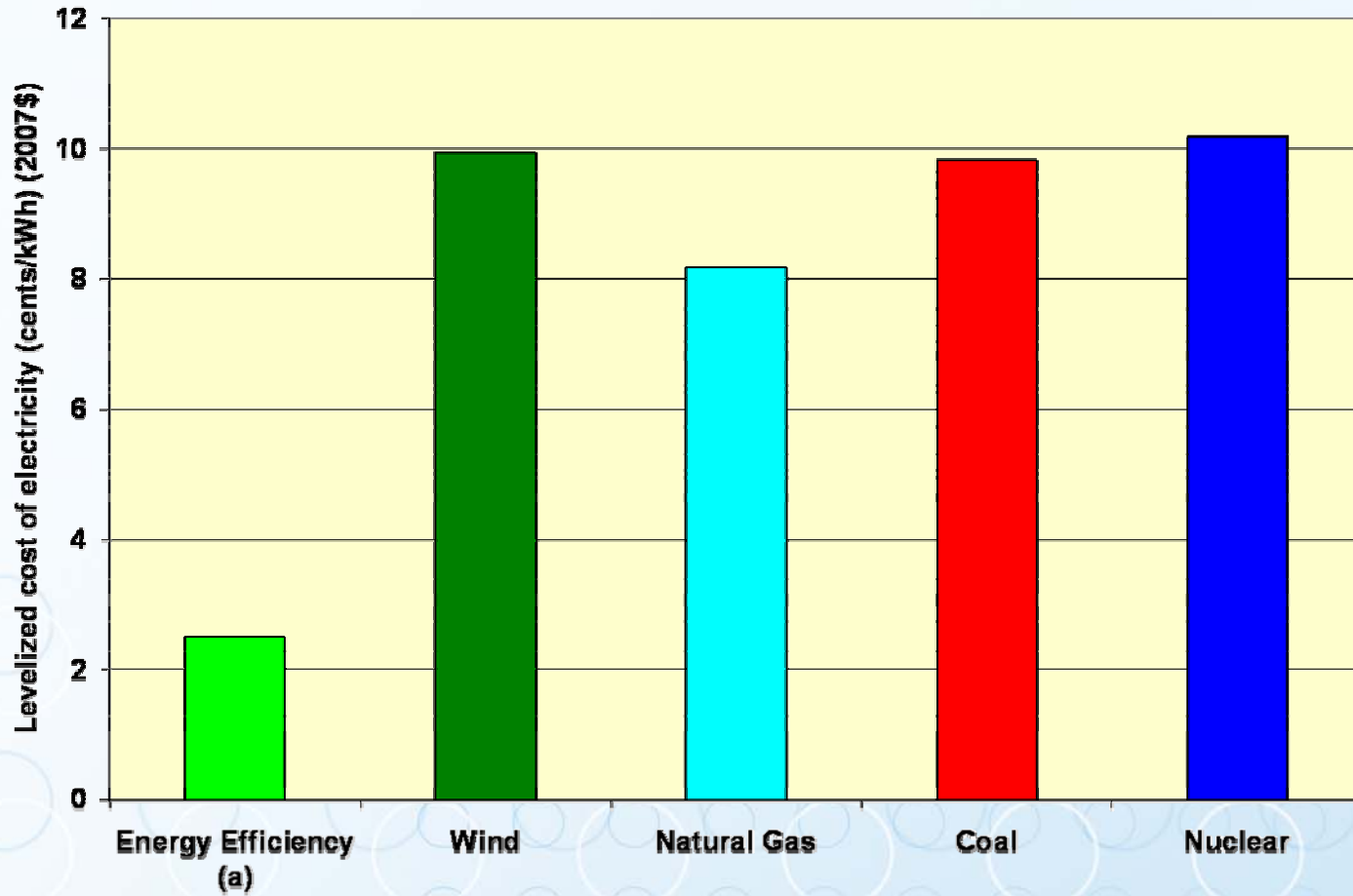
# Gas Savings in Leading States

- 1.5%/yr Minnesota target; averaged ~0.9% in past three years
- NYS target very similar (14.7% cumulative savings by 2020)
- Vermont Gas saved ~1.2% in 2007
- Iowa averaged ~0.8% in past 3 years

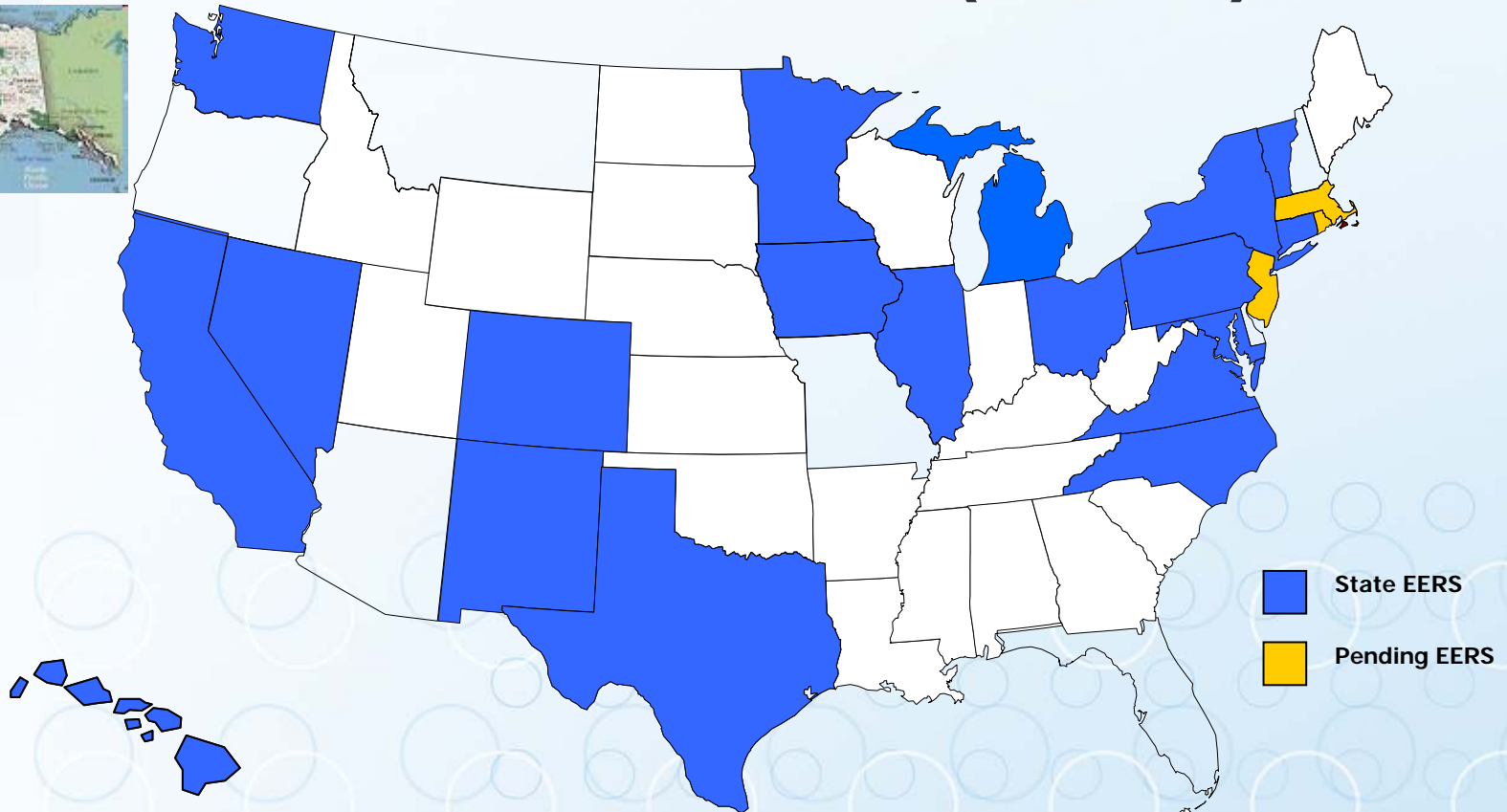




# The Cost of New Electric Resources



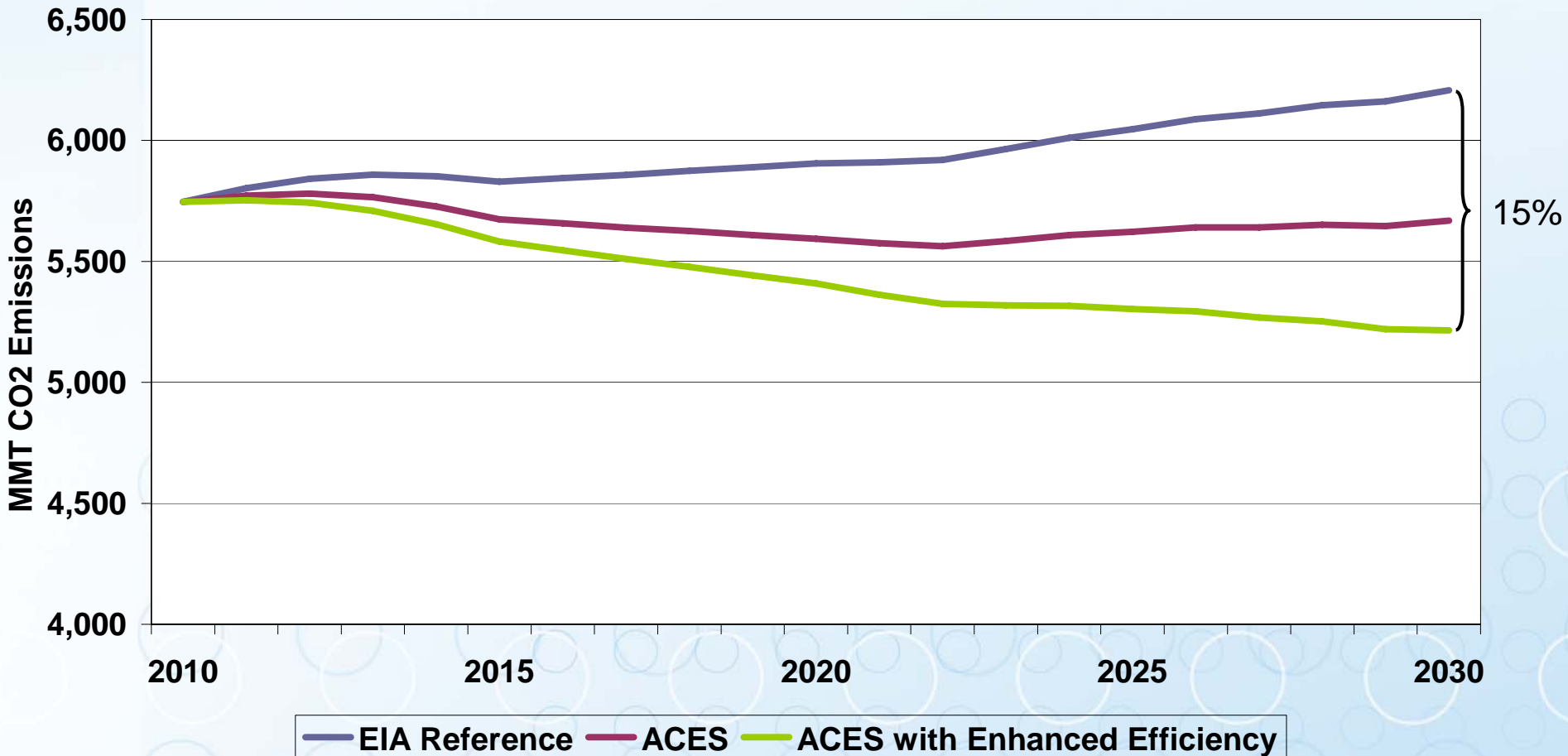
# States with Energy Efficiency Resource Standards (EERS)



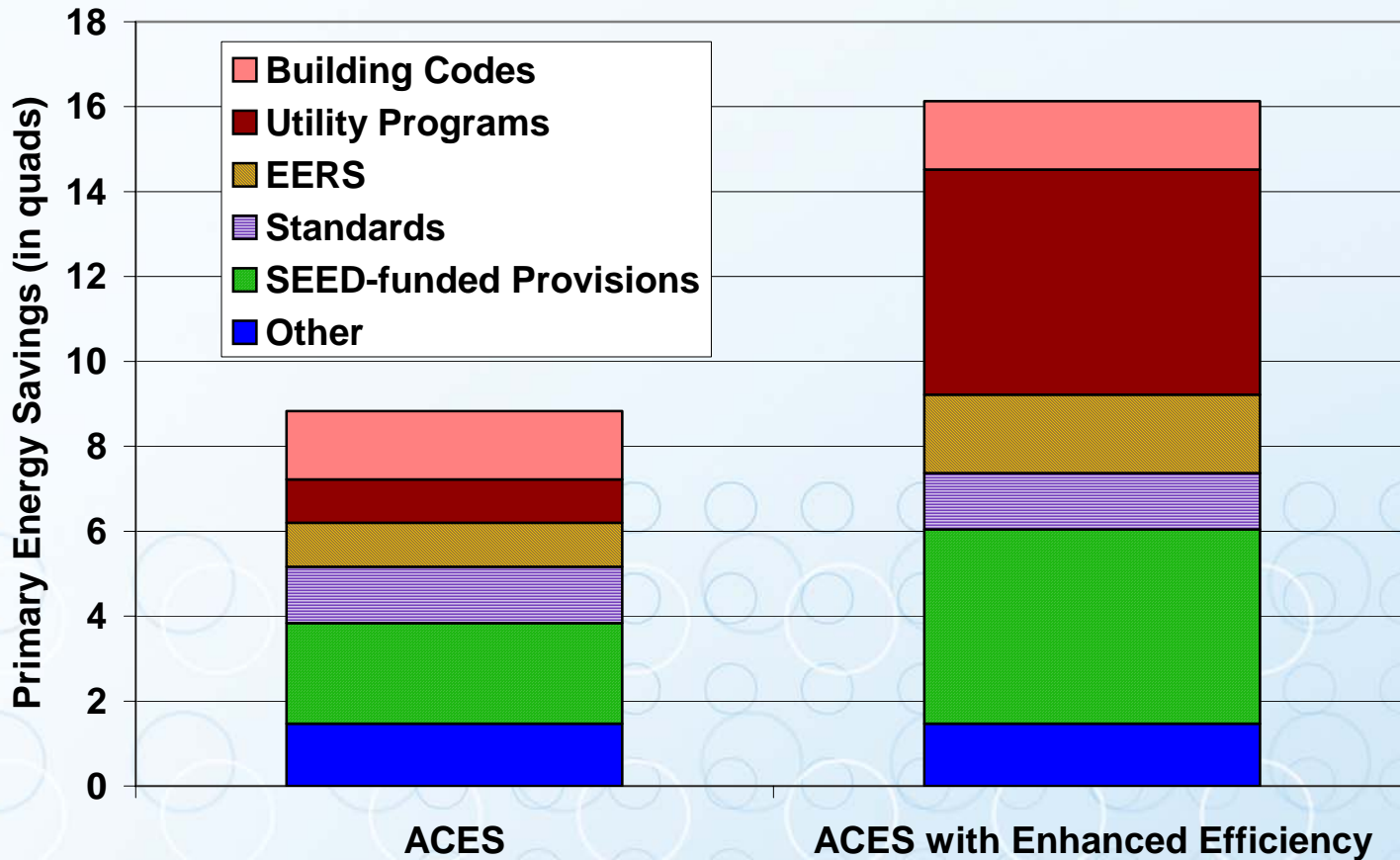
These plus BAU EE will save ~5% nationally by 2020

# EE in Waxman-Markey Lowers CO<sub>2</sub>

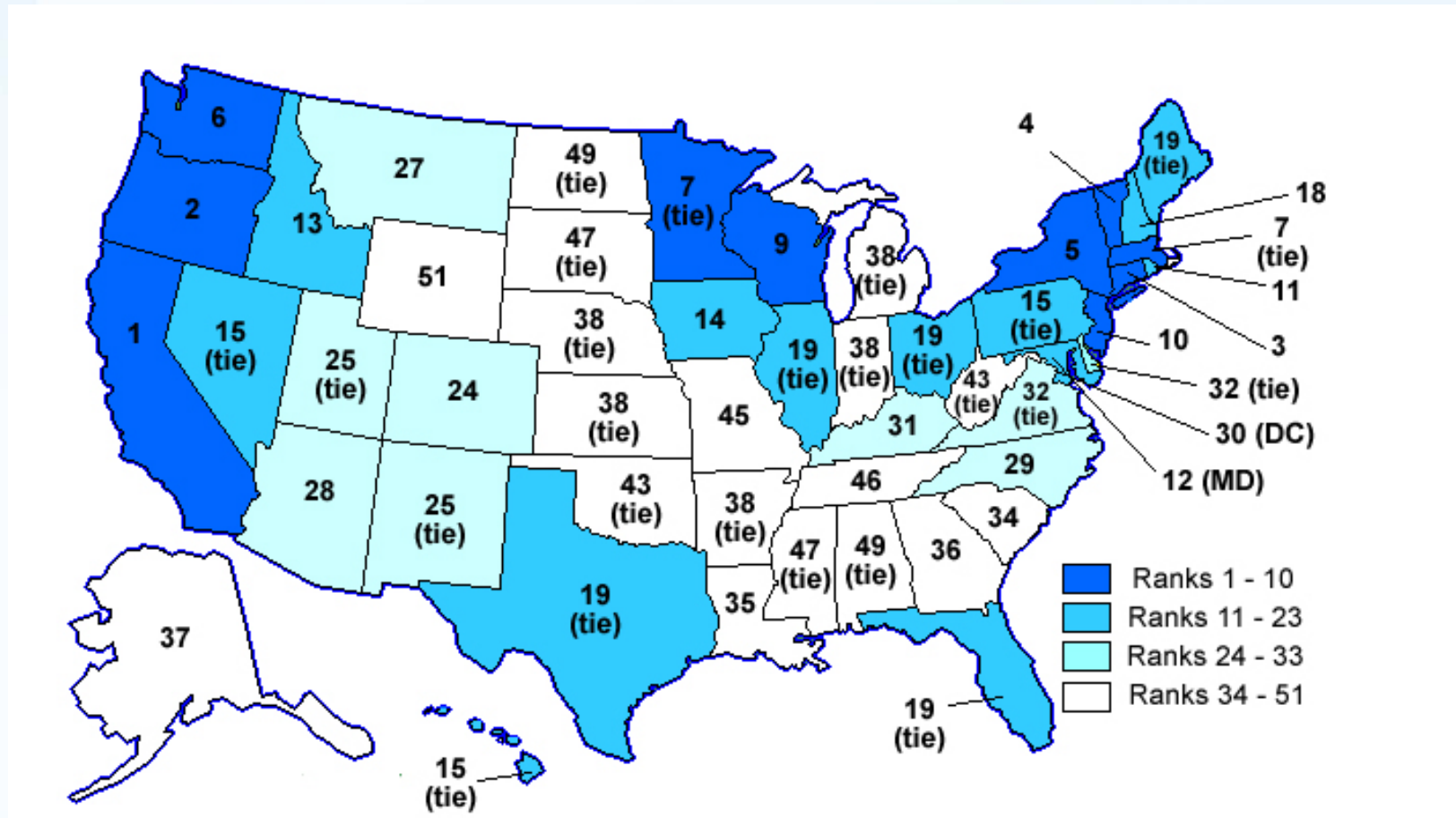
## National CO<sub>2</sub> Emissions



# Energy Savings by Provision

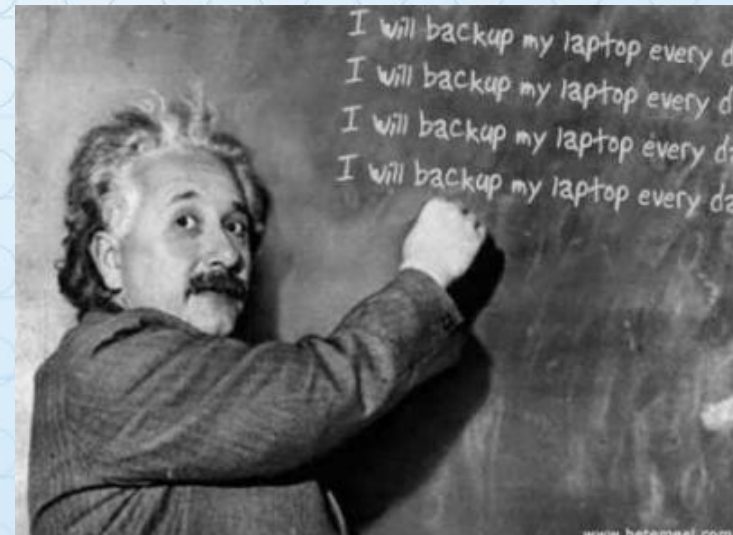


# ACEEE's 2008 State Energy Efficiency Scorecard Results



# Lessons Learned Thus Far for Achieving High Savings

- Strong targets to aim for
- Robust budgets
- Good, creative, motivated staff and leadership
- Supportive regulators that provide some flexibility
- A business case for EE investments (incentives, maybe decoupling)



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