



MEEA
Midwest Energy Efficiency Alliance

WHAT ARE THE CHALLENGES AND OPPORTUNITIES IN THE MIDWEST

ACEEE Market Transformation conference
April 22, 2015

The Source On Energy Efficiency

Midwest Energy Efficiency Alliance (MEEA)

- MEEA is a collaborative network whose purpose is to **advance energy efficiency** to support sustainable economic development and environmental preservation.
- Formed in 1999 to bring strategic partners together to improve market conditions for energy efficiency.

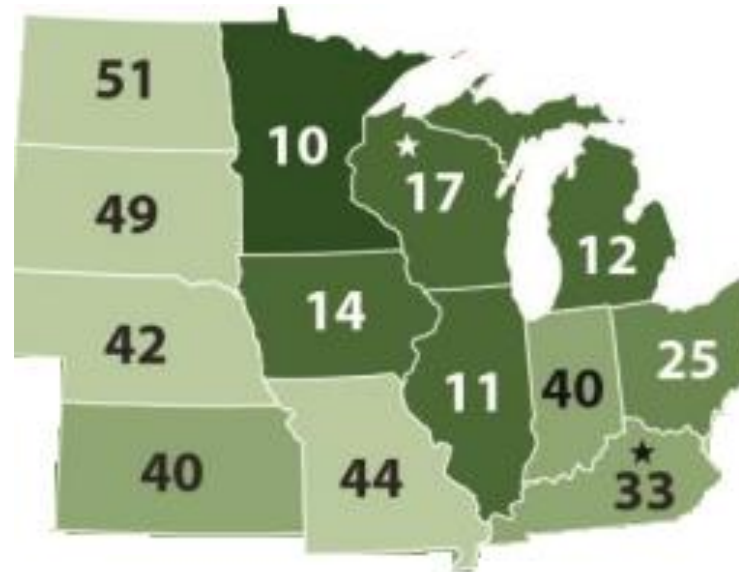


MEEA's Role in the Midwest

- Nonprofit serving 13 Midwest states: IL, IN, IA, KS, KY, MI, MN, MO, NE, ND, OH, SD, WI
- Actions:
 - Advancing Energy Efficiency Policy
 - Facilitating Energy Efficiency Programs
 - Coordinating Utility Program Efforts
 - Delivering Training & Workshops
 - Evaluating & Promoting Emerging Technologies
 - Promoting Best Practices

ACEEE 2014 Scorecard

- Top Midwest states in 2014:
 - Minnesota (10)
 - Illinois (11)
 - Michigan (12)
 - Iowa (14)

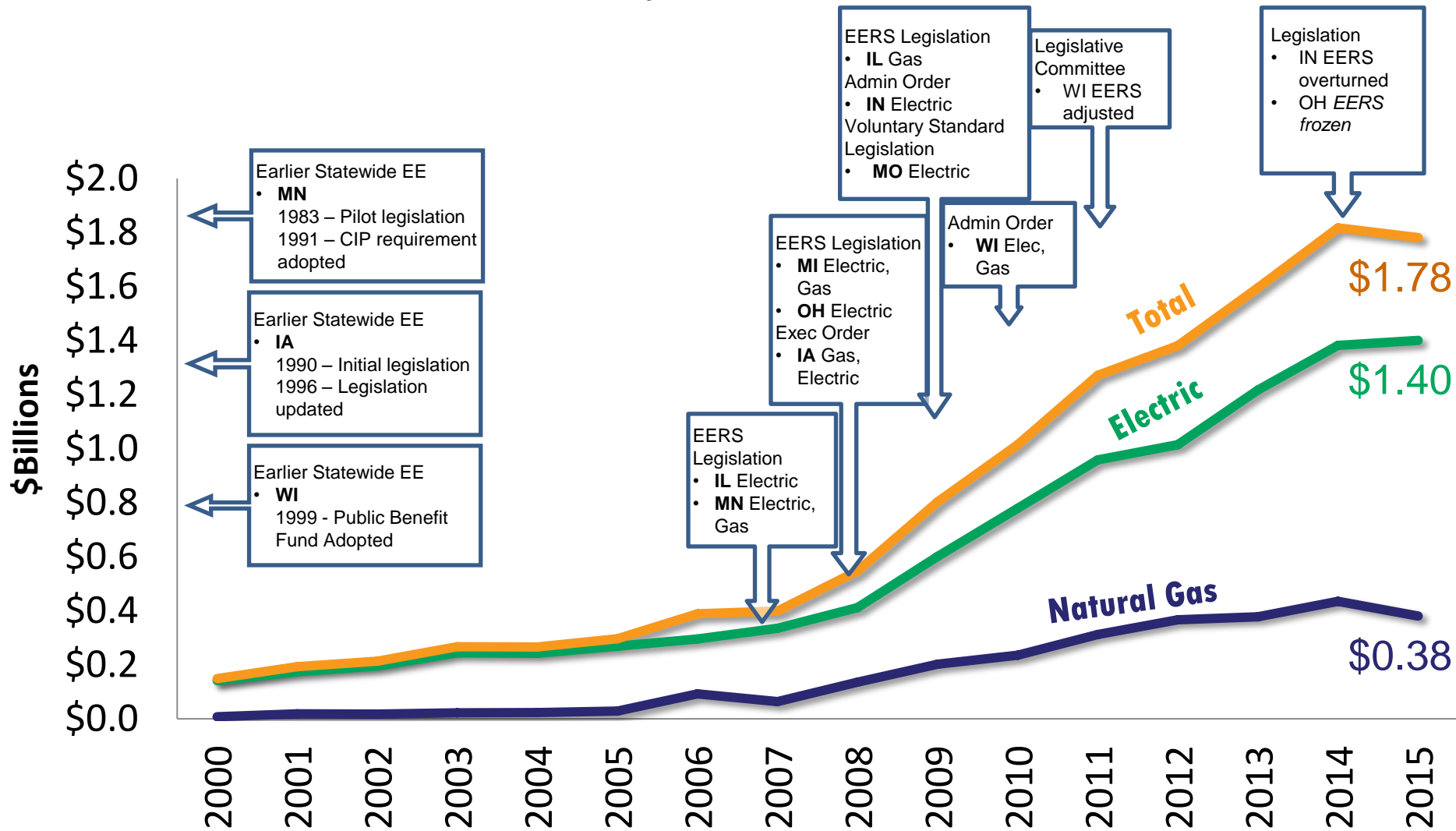


- Updated methodology: States now lose a point for industrial opt out policies

Policy Trends (all Challenges)

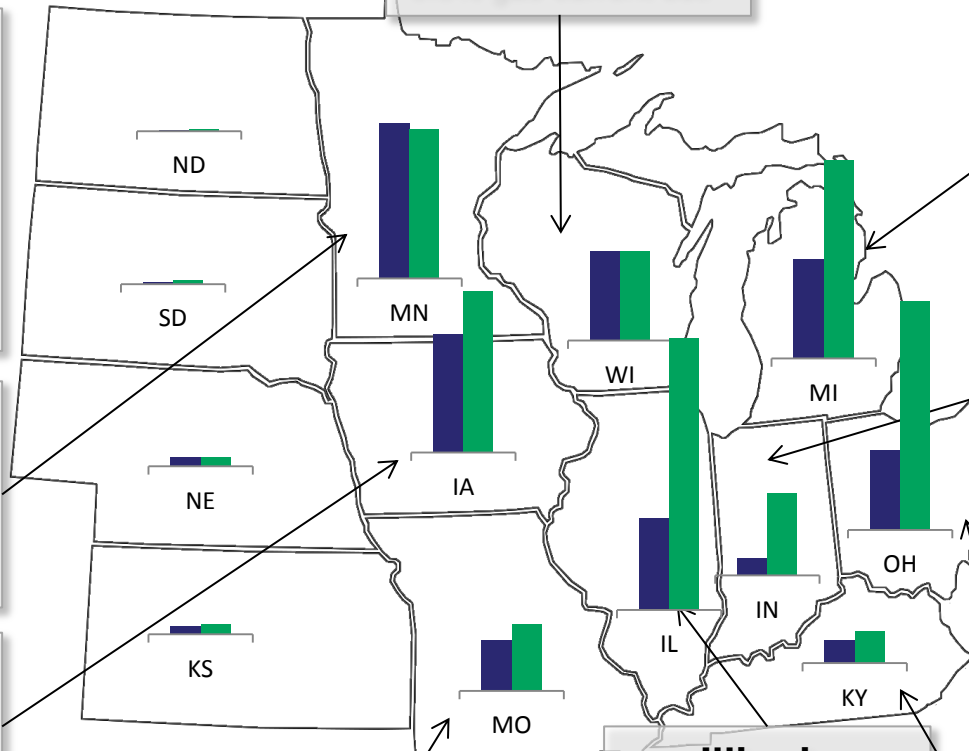
- Repeal of Energy Efficiency Mandates
- New Politicians and New Politics
 - Legislators vs. Governors/Commissions
- Discussion of IRP 'as good' as EEPS
- Industrial Opt-outs

Estimated Annual Utility Investment in Energy Efficiency in the Midwest



Midwest Efficiency Targets and Funding Levels

2010 \$1.01 billion
 2015 \$1.78 billion



Wisconsin
 No specific targets
 0.6% elec current est.
 0.5% gas current est.

**North Dakota
 South Dakota
 Nebraska
 Kansas**
 Voluntary energy efficiency only

Michigan
 1% elec by 2012
 0.75% gas by 2012
 Legislative rollback proposed

Minnesota
 1.5% elec by 2010
 1.0% gas by 2010
 (gas goal reduced by commission)

Indiana
 Overturned 2014
 Future legislation & funding unclear

Iowa
 Set on a utility basis
 1.2% elec current plans
 0.85% gas current plans

Ohio
 Two-year "freeze" after 2014.
 Future legislation & funding unclear.

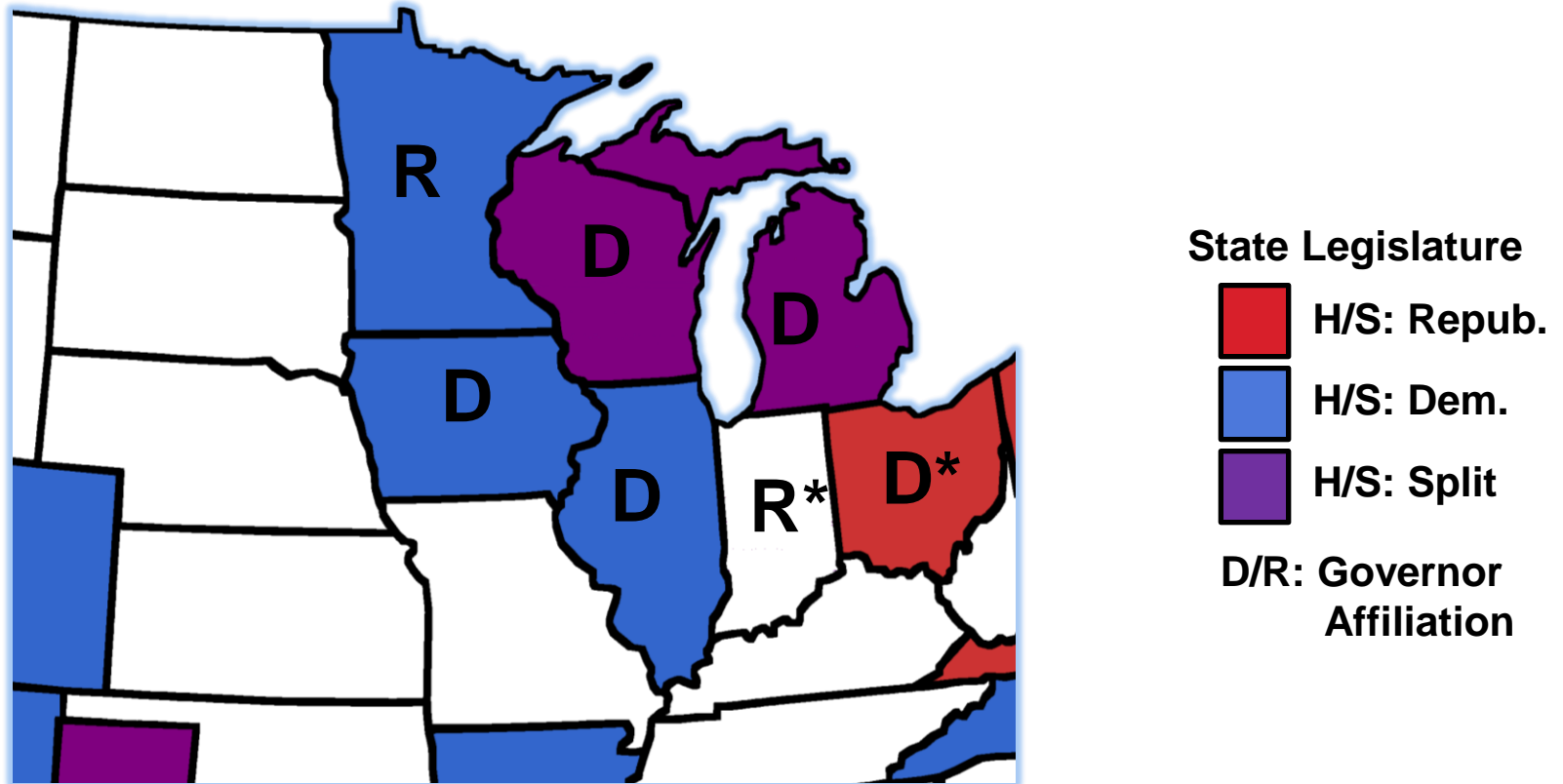
Missouri
 IRP process;
 Voluntary electric

Illinois
 2% elec by 2015
 1.5% gas by 2017
 Fund sweep of State program proposed

Kentucky
 Voluntary electric and gas

Energy Efficiency is a Bipartisan Issue

*State House/Senate and Governor party affiliation
at the time of the first enactment of EEPS Policy*

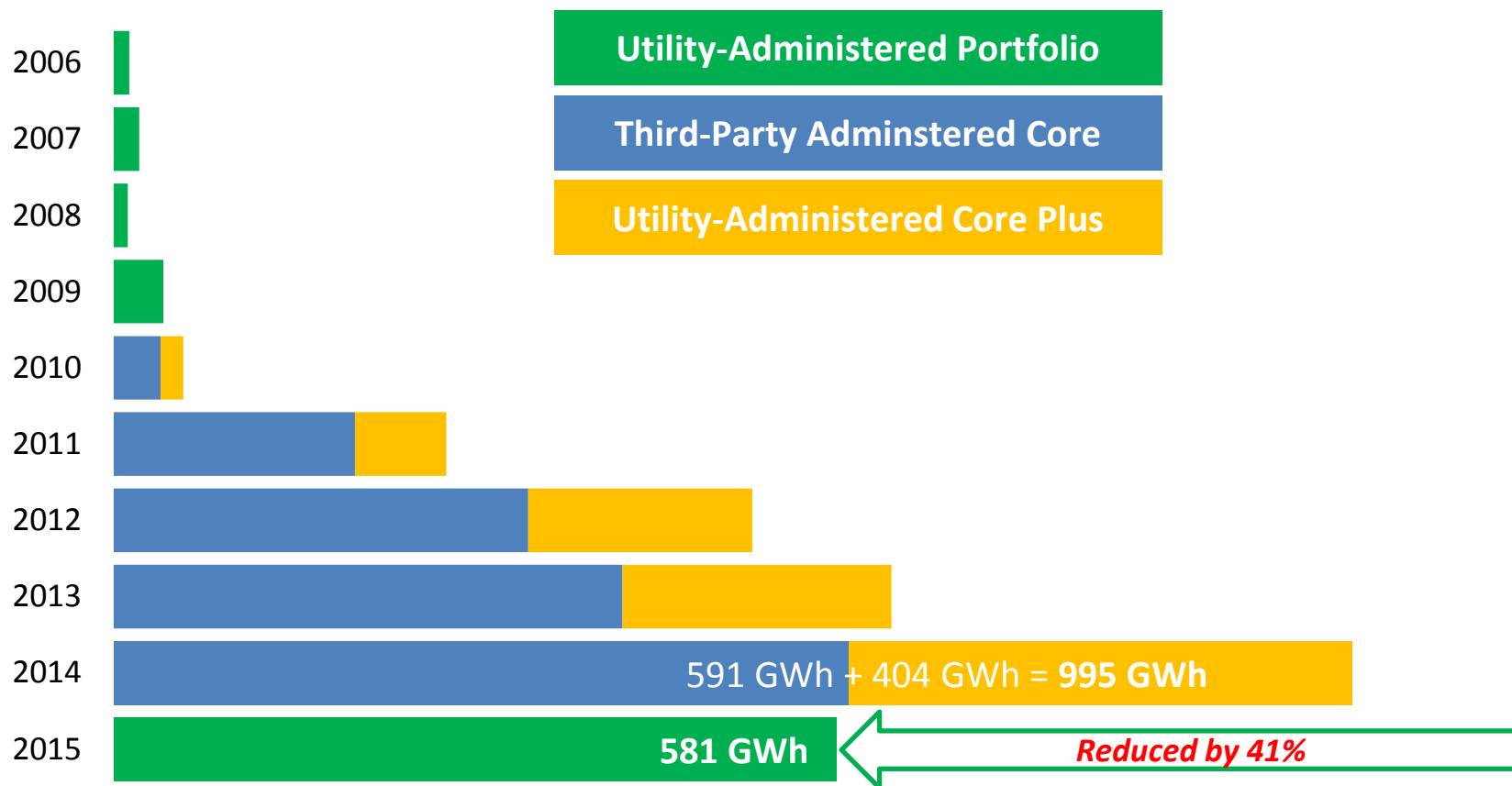


* Indiana recently eliminated its EEPS policy, but is considering new legislation. Ohio has recently weakened its EEPS with a two-year “freeze” on the standard.

Midwest Election Results: 2015 Makeup

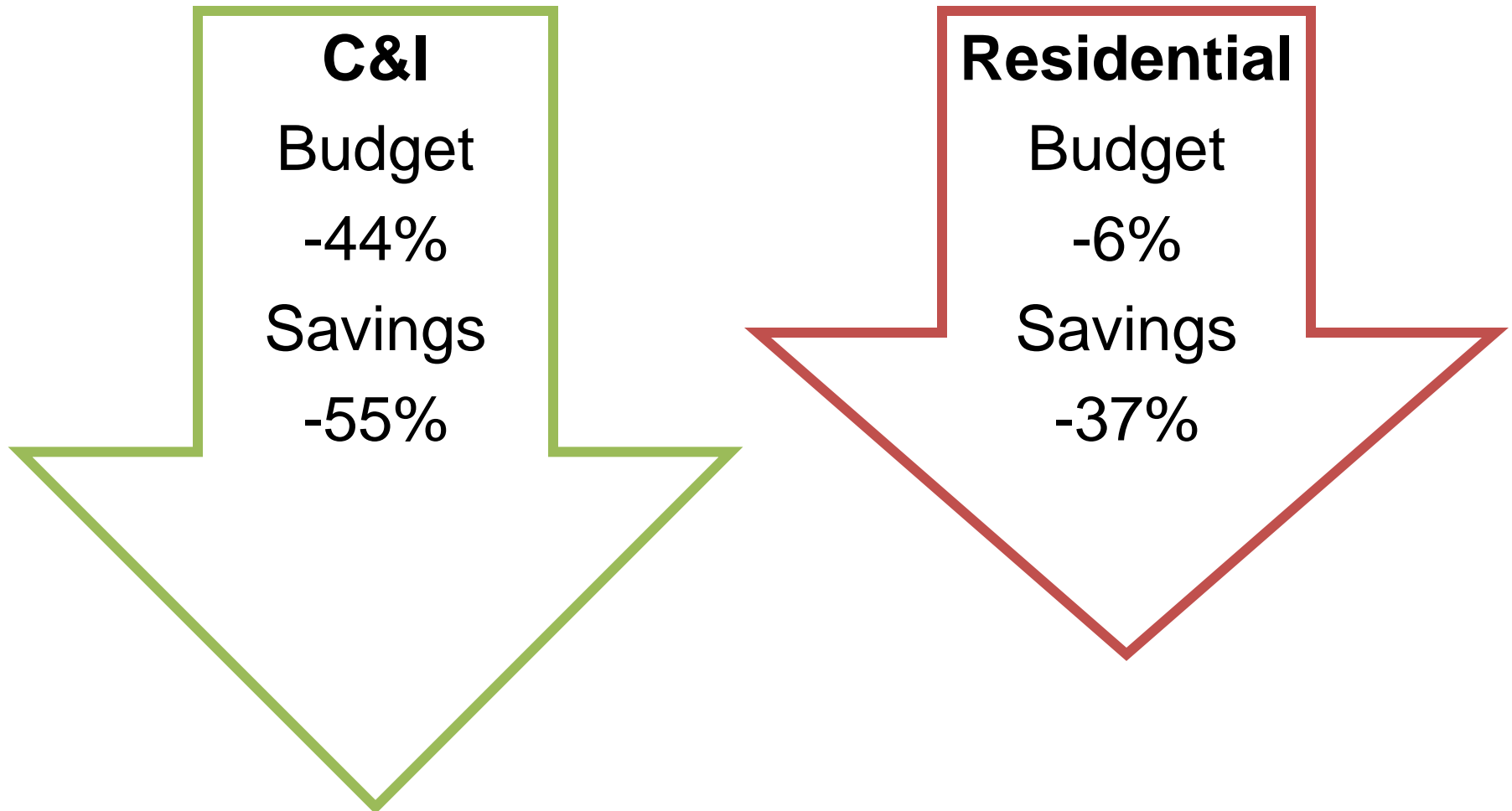
Governor			Senate		House		Supermajority
State	Name	Party	D	R	D	R	Party
IL	Bruce Rauner	R	39	20	71	47	Democratic
IN	Mike Pence	R	10	40	29	71	Republican
IA	Terry Branstad	R	26	24	43	56	--
KS	Sam Brownback	R	8	32	27	98	Republican
KY	Steve Beshear	D	10	27	54	46	--
MI	Rick Snyder	R	11	26	47	63	Republican
MN	Mark Dayton	D	39	28	62	72	--
MO	Jay Nixon	D	8	25	45	118	Republican
NE	Pete Ricketts	R	Unicameral/Nonpartisan; 49				--
ND	Jack Dalrymple	R	15	32	23	71	Republican
OH	John Kasich	R	10	23	34	64	Republican
SD	Dennis Daugaard	R	8	27	12	58	Republican
WI	Scott Walker	R	14	19	35	63	--

Energy Savings in Indiana Pre-, During, and Post-EERS

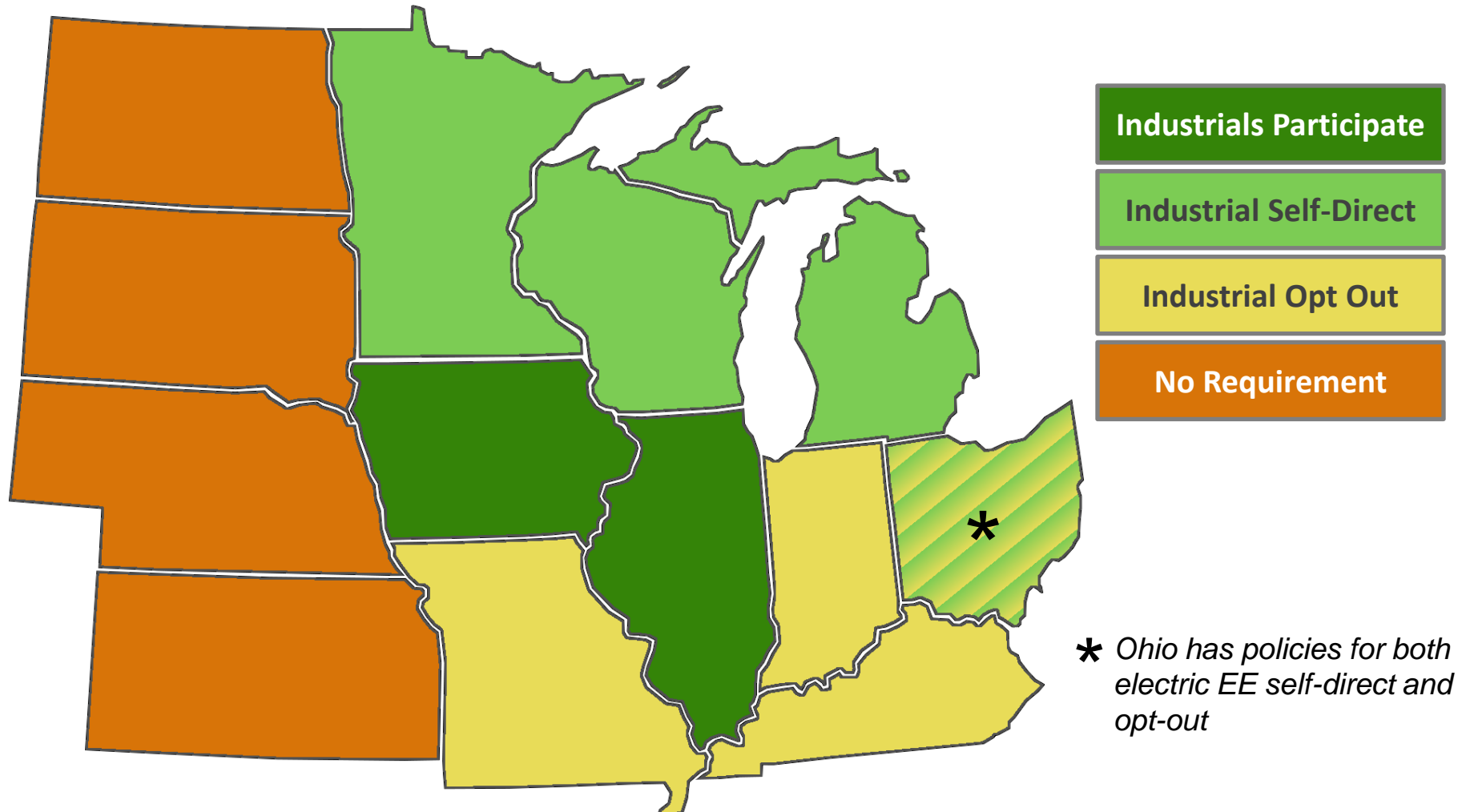


Source: Form EIA-861, ACEEE Scorecards, Utility Filings in IURC Causes 42693-S1, 43955-DSM 02, 44486, 44495, 44497, and 44501

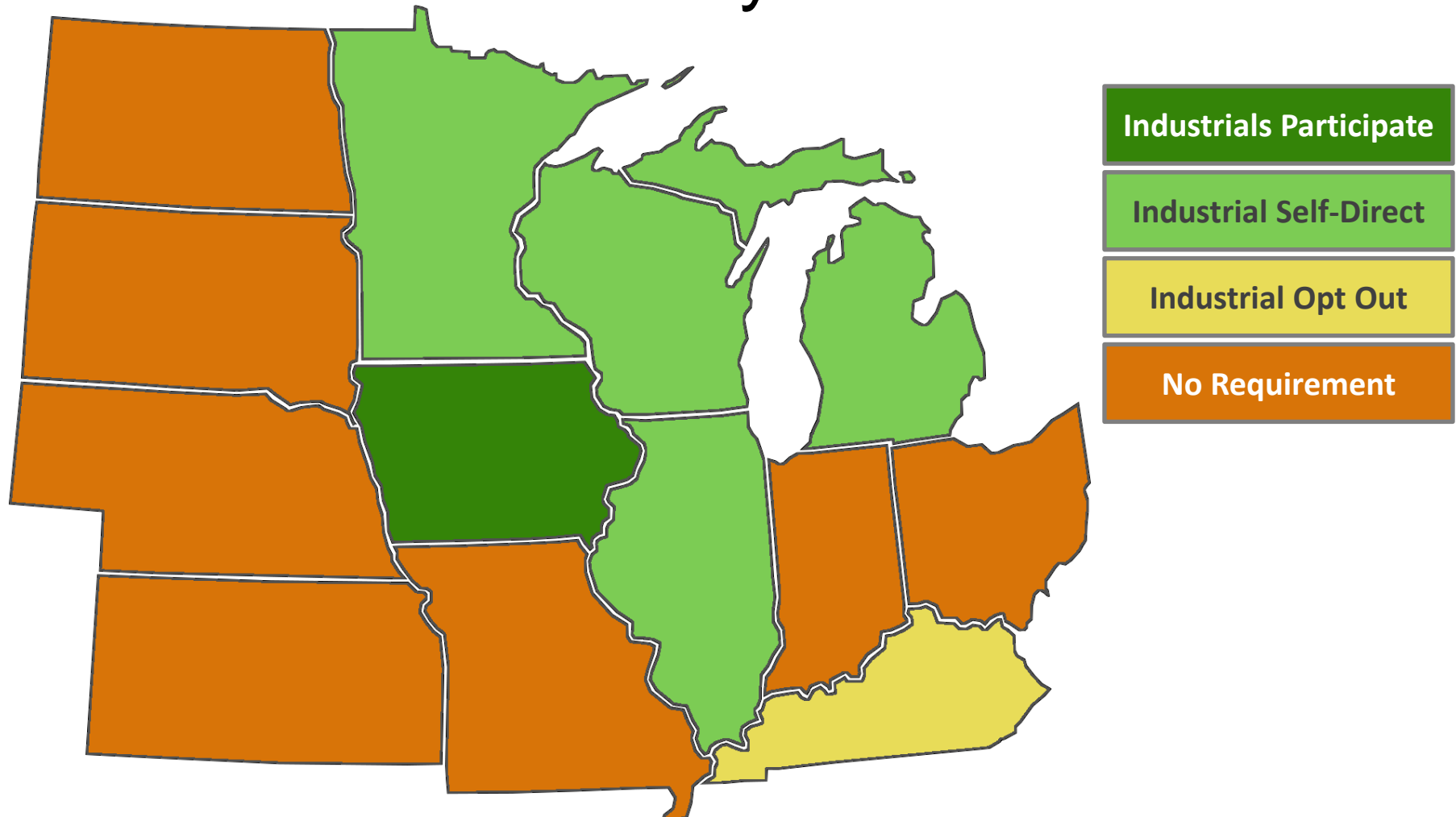
Sector-Level Impact of SEA 340 on Utility Plans for Energy Efficiency in 2015



Industrial Electric Energy Efficiency Policies



Industrial Natural Gas Energy Efficiency Policies



Challenges create Opportunities

the Business Case for EE

- Clean Power Plan
- Benchmarking
- Building Energy Codes
 - Utility Claimed Savings for Compliance
- Improved Commercial & Industrial Operations
 - Promotion of the Good Guys
- Systems trainings & certifications
 - Building Operator Certification
 - HVAC SAVE
- Integrated Efficiency

EPA Clean Power Plan

State	2012 Fossil Emission Rate (lb/MWh)	Adjusted Baseline Rate (lb/MWh)	Percent Reduction from Baseline Rate by Building Block				Total Reduction from Baseline	2030 Goal (lb/MWh)
			1	2	3	4		
Illinois	2,189	1,894	-6%	-9%	-7%	-11%	-33%	1,271
Indiana	1,991	1,924	-6%	-2%	-3%	-9%	-20%	1,531
Iowa	2,197	1,552	-6%	-10%	11%	-11%	-16%	1,301
Kansas	2,320	1,940	-6%	0%	-9%	-8%	-23%	1,499
Kentucky	2,166	2,158	-6%	-2%	-1%	-9%	-18%	1,763
Michigan	1,814	1,690	-5%	-12%	-4%	-11%	-31%	1,161
Minnesota	2,013	1,470	-6%	-27%	3%	-11%	-41%	873
Missouri	2,010	1,963	-6%	-5%	-2%	-9%	-21%	1,544
Nebraska	2,162	2,009	-6%	-4%	-8%	-9%	-26%	1,479
North Dakota	2,368	1,994	-6%	0%	-1%	-4%	-11%	1,783
Ohio	1,897	1,850	-5%	-4%	-9%	-9%	-28%	1,338
South Dakota	2,256	1,135	-6%	-30%	15%	-14%	-35%	741
Wisconsin	1,988	1,827	-5%	-13%	-6%	-10%	-34%	1,203

Questions and Contact Information

Stacey Paradis

Executive Director

Midwest Energy Efficiency Alliance

Sparadis@mwalliance.org

www.mwalliance.org