Welcome to the 2017 ACEEE-CEE MT Symposium

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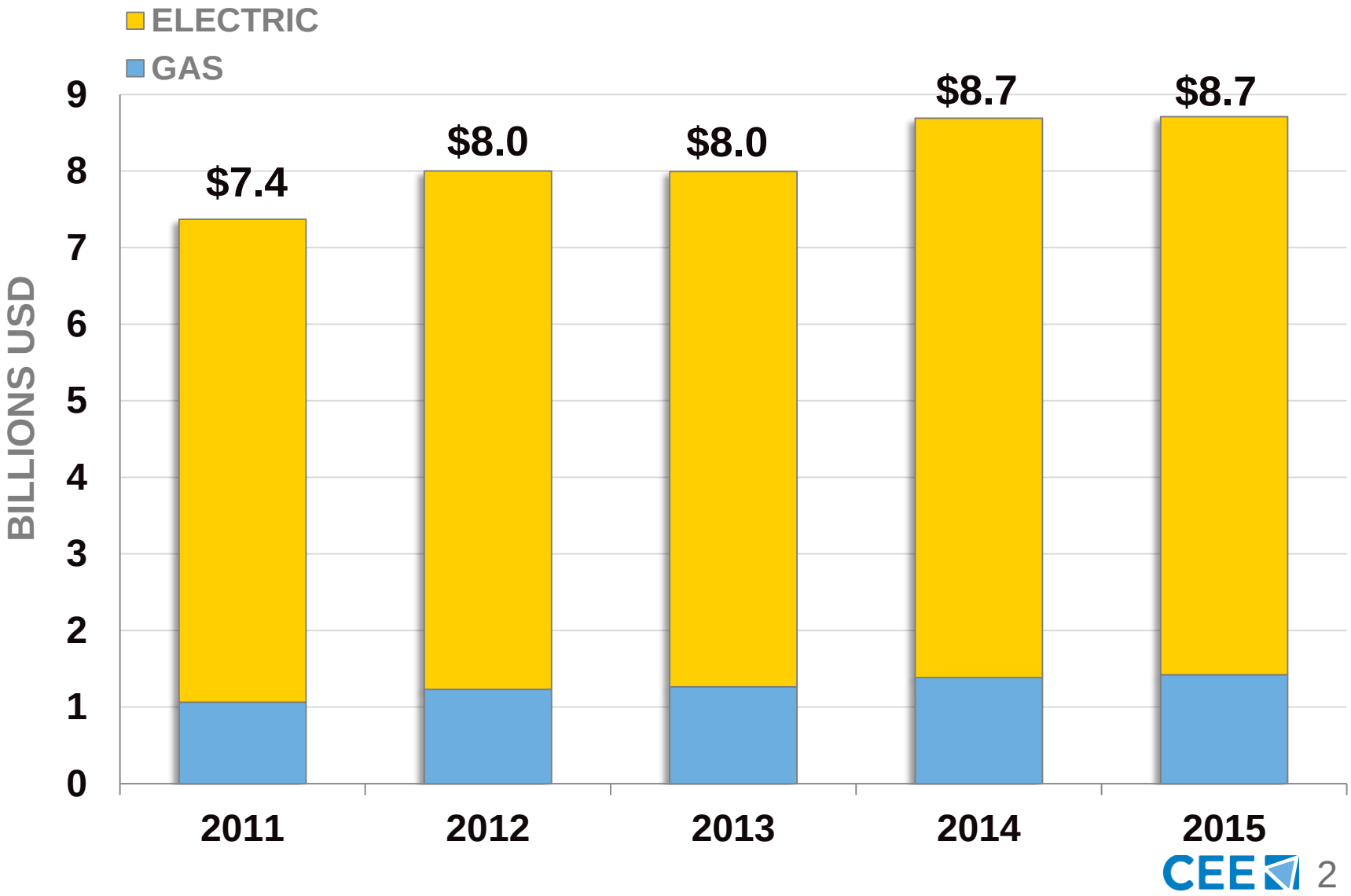
Executive Director, Consortium for Energy Efficiency
April 3, 2017
Arlington, VA

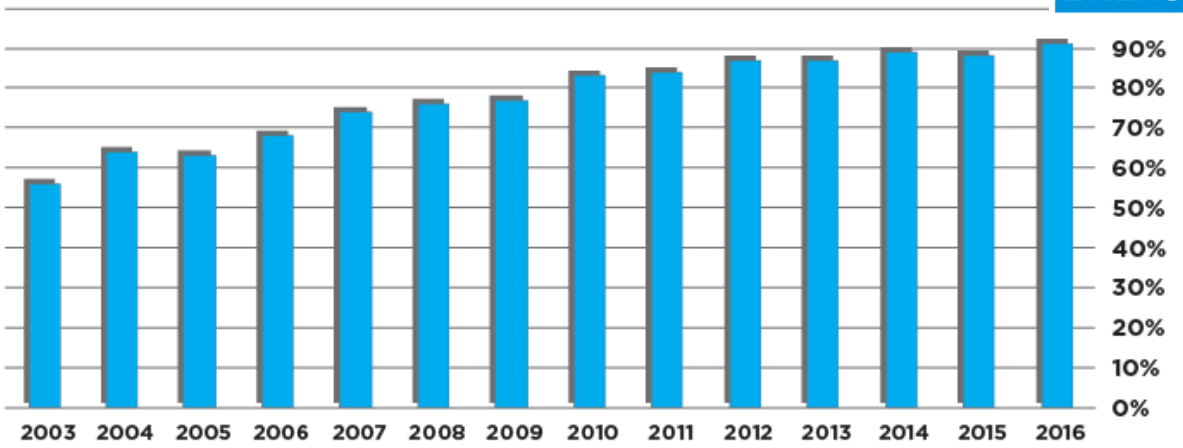
US and Canadian DSM Expenditures



ENERGY STAR® Brand Health

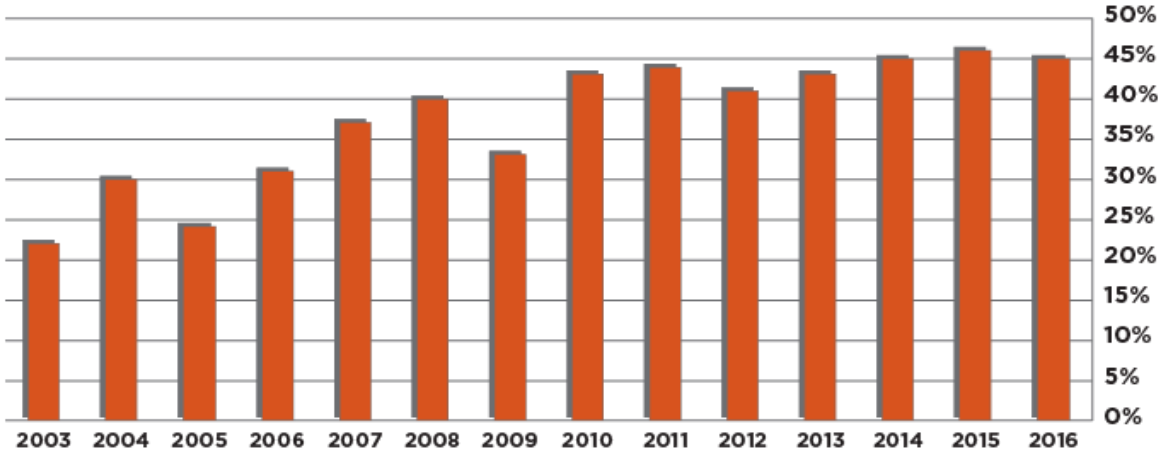
In 2016:

91% of US consumers recognize the label



Of those,

45% purchased an ENERGY STAR product in the last 12 months



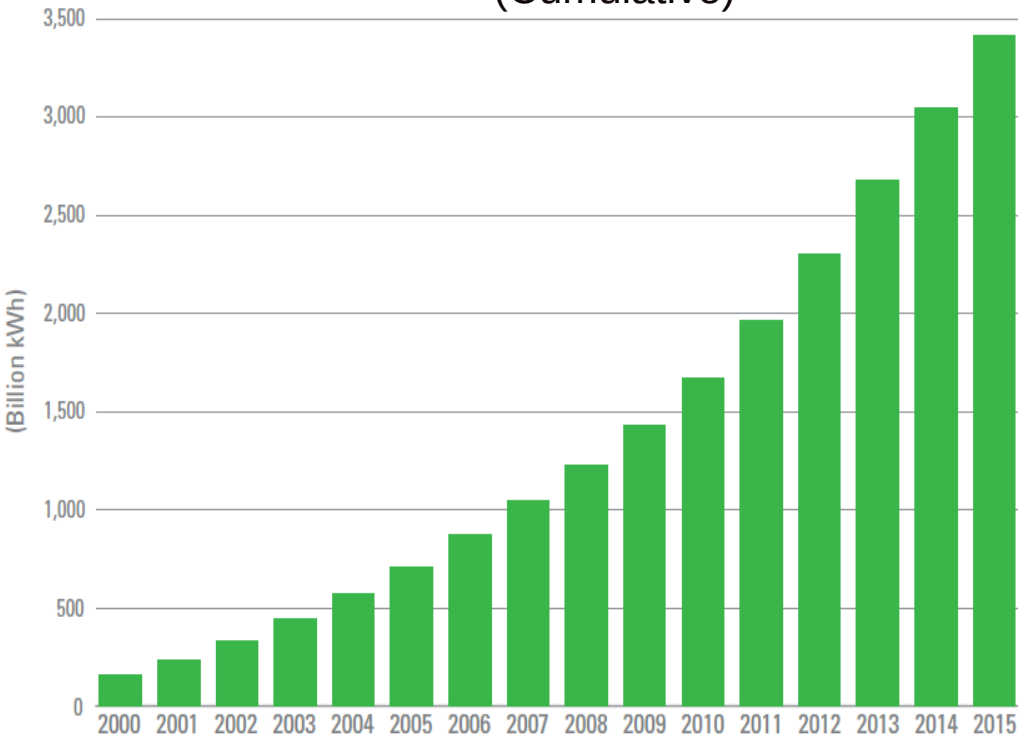
Listed results are from the 2016 National Awareness of ENERGY STAR Household Survey (coming soon)

ENERGY STAR® Brand Impact

ENERGY STAR Components

- **58** Certified Product Categories
- Over **1.6 million** ENERGY STAR homes
- Among the **450,000** commercial buildings benchmarked using the ENERGY STAR Portfolio Manager®, **27,000** have received the label

ENERGY STAR Energy Savings
(Cumulative)



The program has helped families and businesses save $430 billion on their utility bills

Listed data are from the 2015 ENERGY STAR Overview of Achievements

CEE Emerging Technologies Collaborative (ETC)

Based on ETC member expertise, the Collaborative has explored the relative program potential and timeframe of…

156 opportunities

63
Residential

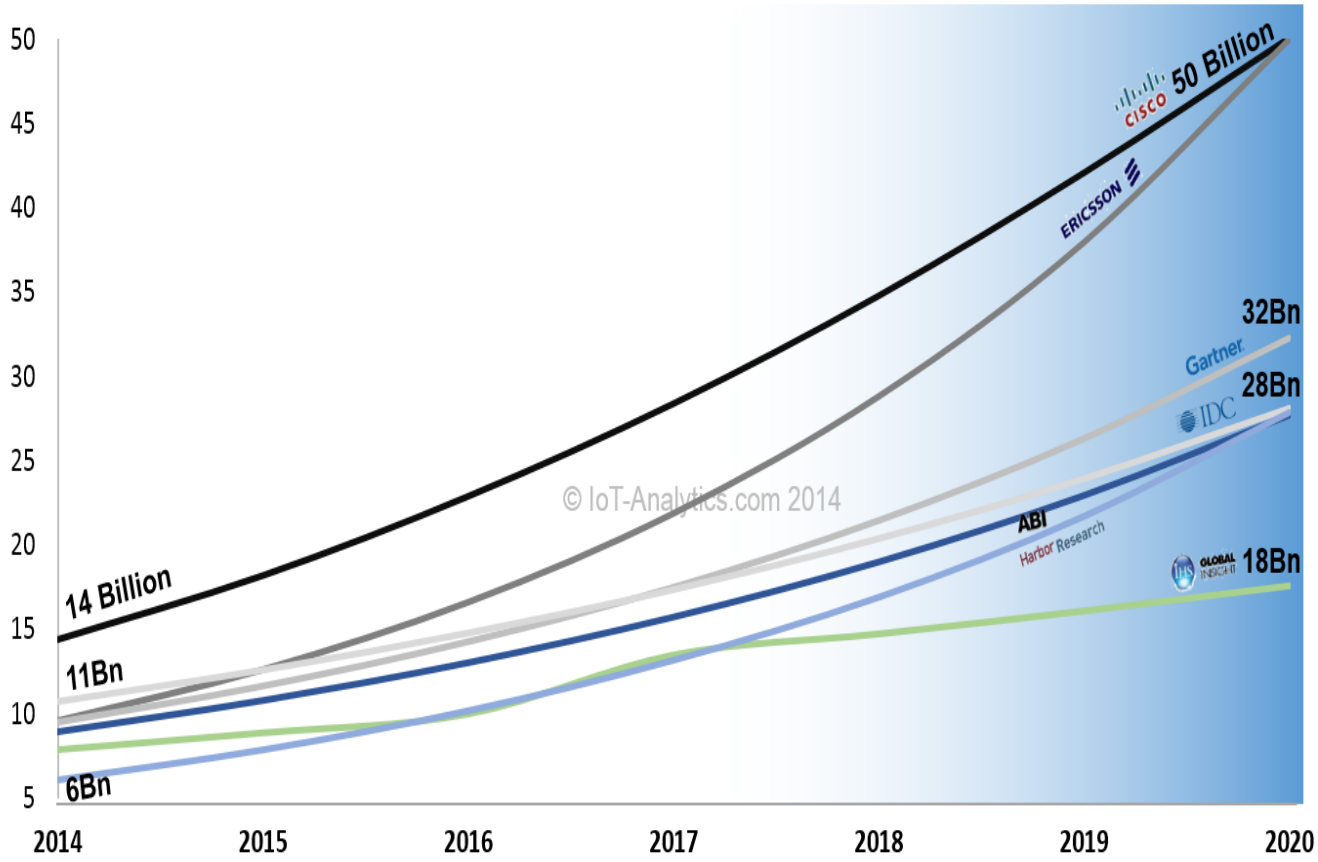
73
Commercial

20
Industrial

Opportunities are identified through the Catalog of Emerging Technologies (ET) Assessments, a compilation of ET assessments carried out by CEE members. The 2016 version includes almost 700 assessments from 20 CEE member organizations, serving over 64 million electric and 34 million gas customers across the US and Canada.

Global IoT/IoE device forecasts

Source	Date	CAGR[1] 2014–'20
CISCO	2013	23%
ERICSSON	2010	-
Gartner	2013	23%
IDC	2014	17%
Harbor Research	2014	29%
ABI research	2014	21%
GLOBAL INSIGHT	2014	14%



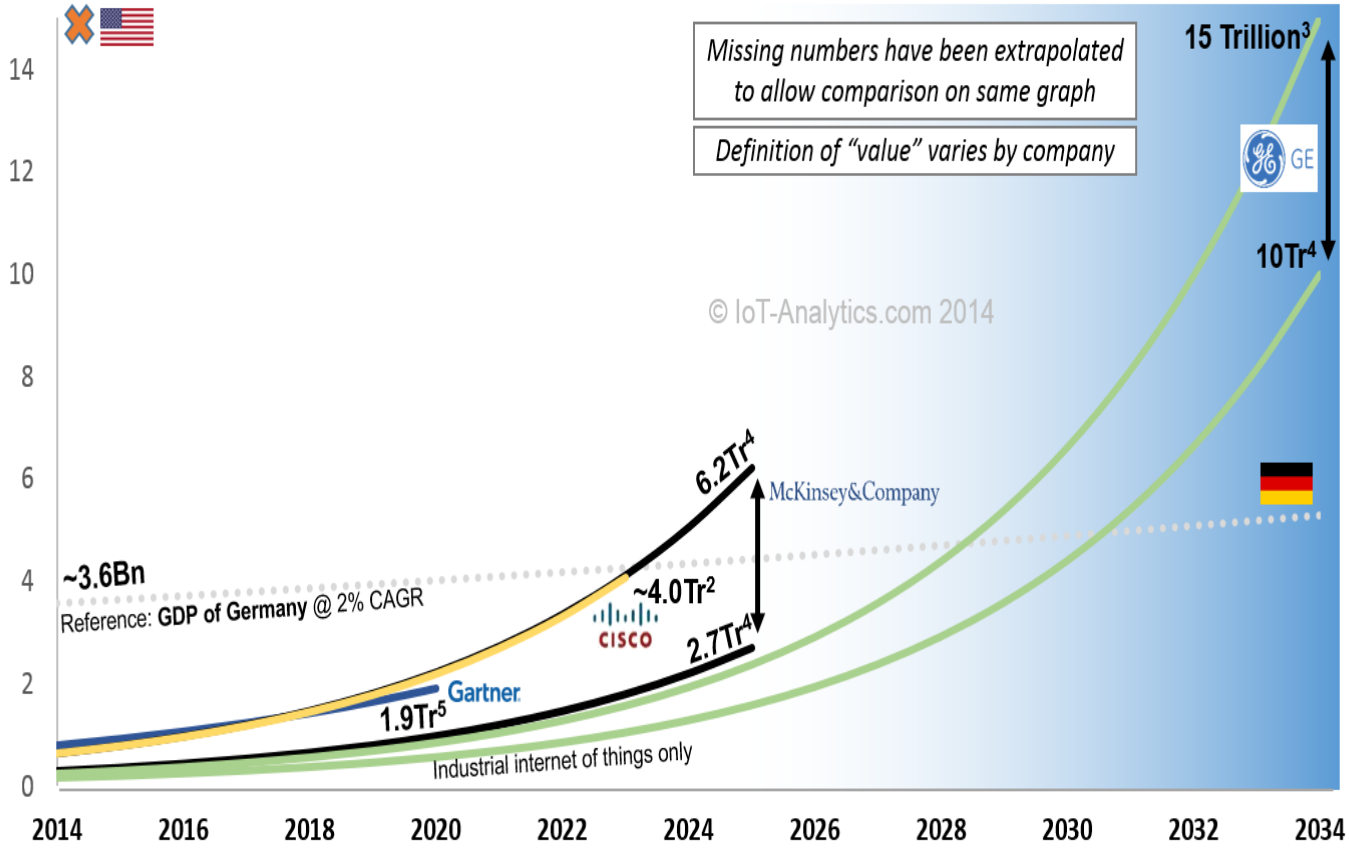
Note: Some forecasts only for specific years, in that case all other years in between are extrapolated based on the corresponding growth rate; Ericsson does not specify today's number of connected devices – therefore: Average of all other studies assumed as starting point in 2014

1. CAGR = Compound annual growth rate 2. Connected devices includes all autonomous connected things (every forecaster has own definition) - does NOT include computers, mobile devices, tablets

Sources: Cisco, Ericsson, ABI Research, Gartner, IHS, IDC, Harbor Research, IoT-Analytics.com

Global IoT/IoE economic value forecasts

Annual economic value of the IoT market (in Trillion USD)

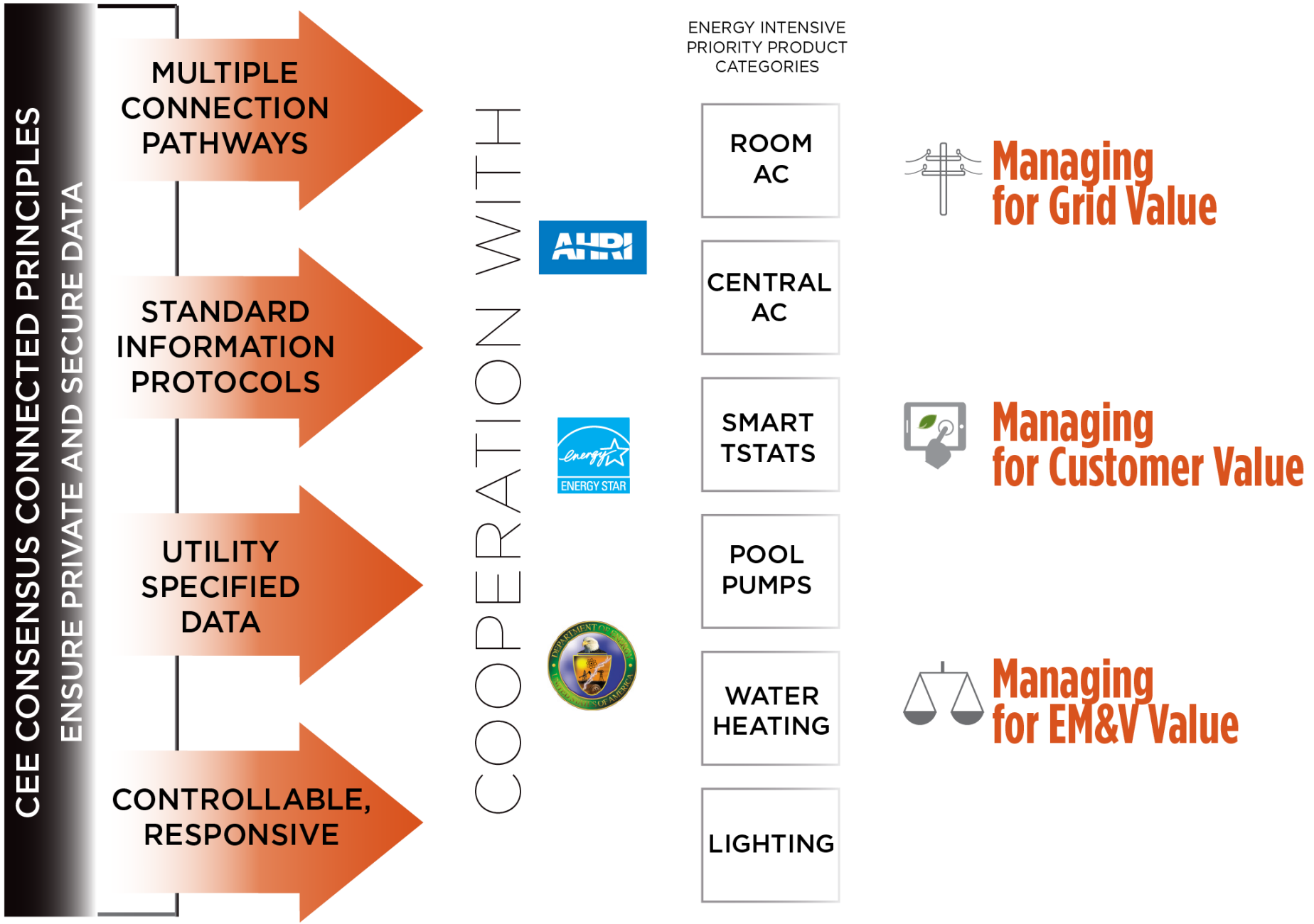


Source	Date	Original quote[1]
McKinsey&Company (4)	2013	"IoT has the potential to create **economic impact** of **$2.7-6.2 trillion** annually **by 2025**"
GE (3) Industrial internet only	2012	"Industrial Internet could **add $10-15 trillion** to **global GDP in 20 years**"
CISCO (2)	2013	"**$19 trillion** in **IoE value is at stake** in the **next decade**"
Gartner (5)	2013	"IoT will result in **$1.9 trillion** in **global economic value-add** in **2020**"
Germany		GDP of the total economy

1. Wording as initially published 2. Cisco "value at stake" has been forecast as $19 trillion over total decade. Value has been spread over 10 years assuming the same annual growth rate as Cisco's IoT device forecast 2014-'20 3. GE's "potential GDP impact" was forecasted as $10-15 trillion in 20 years. Value for the previous years has been assumed using the average IoT device growth rate 2014-2020 of 21% 3. McKinsey's "potential economic value-add" for the years 2014-2024 calculated taking the average IoT device growth rate 2014-2020 of 21%. 5. Gartner's numbers have been calculated using Gartner's annual IoT revenue growth 2014-2020 of 8%.
Sources: McKinsey, General Electric, Cisco, Gartner, IoT Analytics

Reference point: Total GDP of the USA in 2014

Creating the IDSM Platform—CEE View



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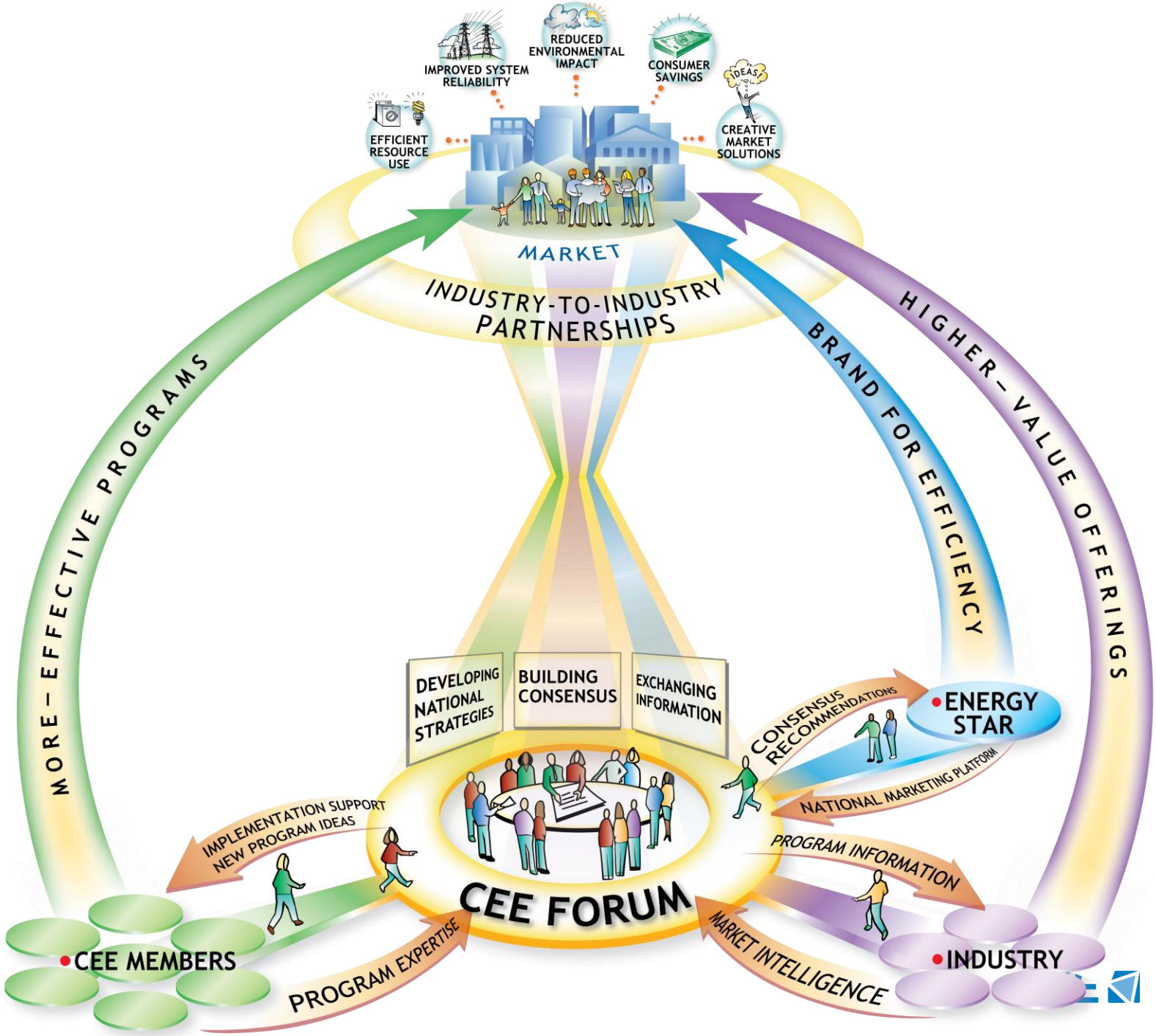
IMPROVED SYSTEM RELIABILITY
REDUCED ENVIRONMENTAL IMPACT
CONSUMER SAVINGS
IDEAS
EFFICIENT RESOURCE USE
CREATIVE MARKET SOLUTIONS
MARKET
INDUSTRY-TO-INDUSTRY PARTNERSHIPS
MORE-EFFECTIVE PROGRAMS
BRAND FOR EFFICIENCY
HIGHER-VALUE OFFERINGS
DEVELOPING NATIONAL STRATEGIES
BUILDING CONSENSUS
EXCHANGING INFORMATION
CONSENSUS RECOMMENDATIONS
ENERGY STAR
NATIONAL MARKETING PLATFORM
IMPLEMENTATION SUPPORT
NEW PROGRAM IDEAS
PROGRAM INFORMATION
CEE FORUM
CEE MEMBERS
PROGRAM EXPERTISE
MARKET INTELLIGENCE
INDUSTRY

Thank You for Participating and Your Contribution Toward an Energy Efficient Future