

1 Q. Please provide the Enel X, formerly known as EnerNOC, demand response presentation
2 prepared for Hydro in May 2016 entitled *NLH DR Potential*.

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5 A. Please refer to PUB-NLH-047, Attachment 1: "NLH DR Potential," EnerNOC, May 13, 2016.



NLH DR Potential

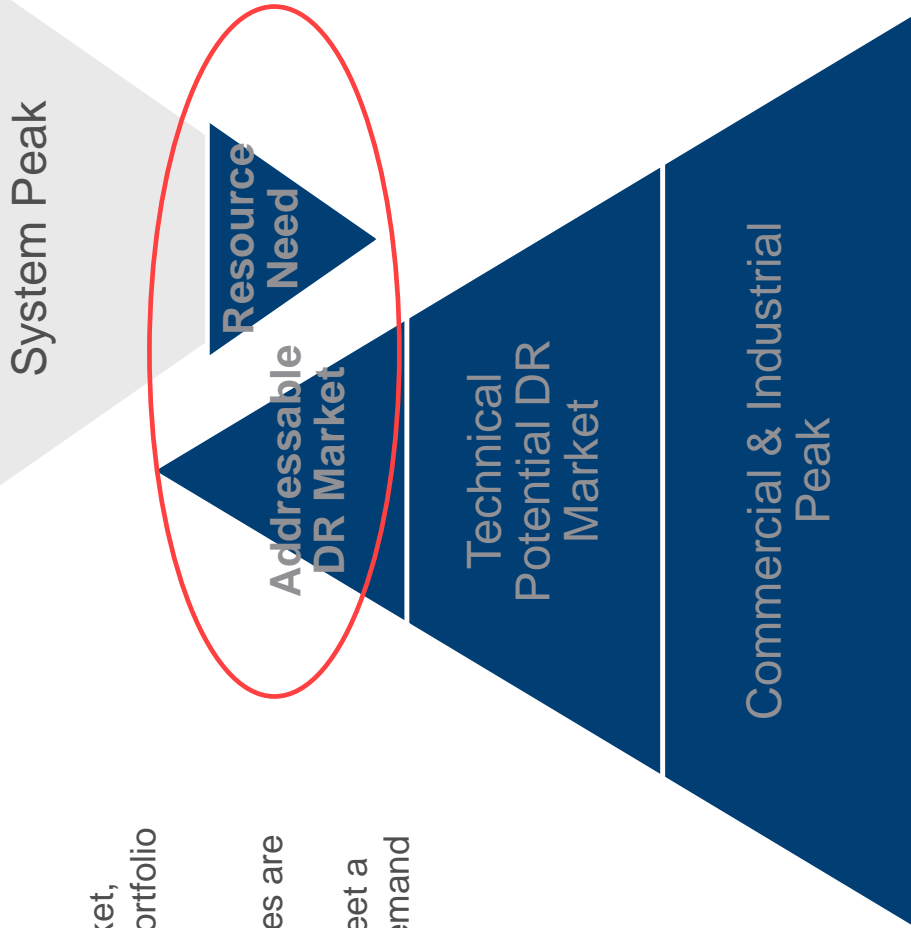
May 13, 2016

EnerNOC's Approach to Market Sizing

Marrying bottom-up methodology with top-down experience-based judgment to develop the most **realistic program size** possible

This strategy allows us to:

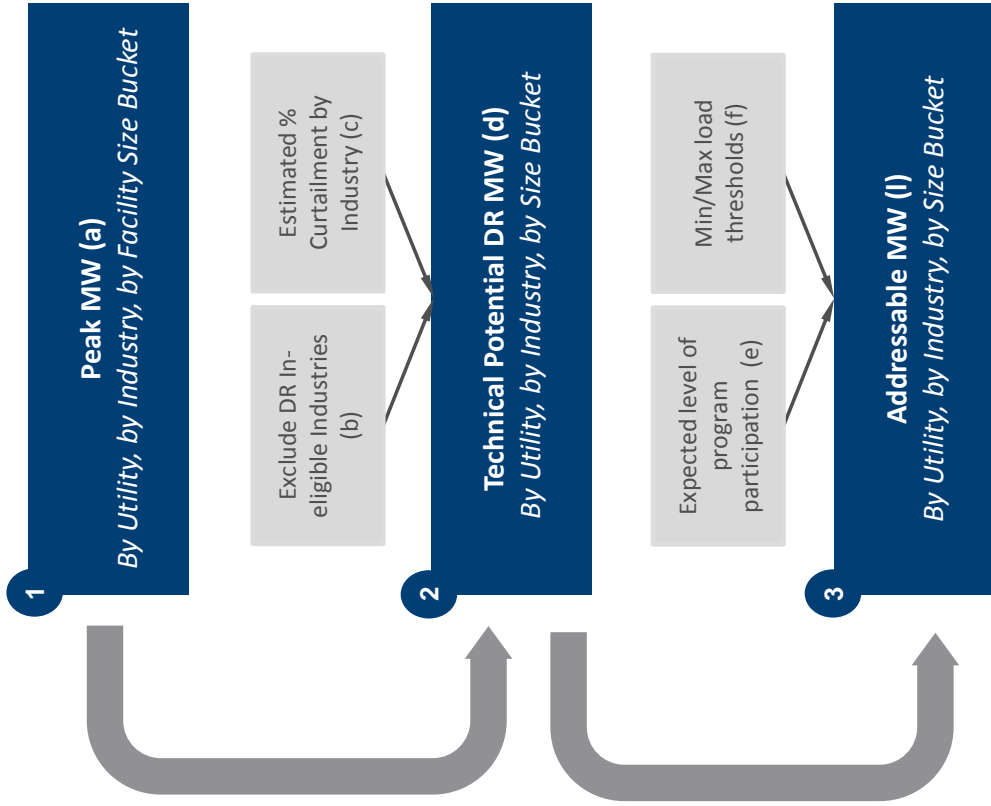
1. Deeply understand the composition of the market, and identify a diverse portfolio of program participants
2. Ensure that our estimates are in line with known utility operational data and meet a resource need (peak demand management, etc.)



Utility Market Sizing Model Methodology - DR

Source:

- a) NLH Data
- b) EnerNOC Sales & Marketing
- c) EnerNOC Portal data
- d) Calculation
- e) EnerNOC Sales & Marketing
- f) Program parameter
- g) Calculation



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Summary Market Potential

Using NLH data and various DR assumptions based on EnerNOC’s own customer data we arrived at the following estimated market potential:

Category	Estimated Capacity
DR Qualified Peak	214 MW
Technical Potential	58 MW
Addressable DR Potential	9 – 20 MW

The addressable DR potential is the range we believe could be delivered based on the application of our assumptions to data provided by NLH. The actual DR amount will be driven in large part by specific program parameters. The low end assumes 15% penetration with no backup generation; the high end assumes 30% penetration with backup generation.

*For simplicity analysis assumes 1:1 kVA to kW ratio

Market Potential by Industry

Addressable DR potential of 20 MW based on high (30%) adoption rates among eligible customers capable of providing 50kW or more of DR per site.

Segment	DR Qualified Facilities	Addressable DR Potential (kW)	Avg. Peak / Site (kW)	Avg. DR / Site (kW)
Fish Processing	25	3,100	1,048	410
Education	23	3,000	1,550	434
Retail – Other	15	2,200	882	494
Food Manufacturing / Retail	28	1,800	729	219
Construction and Metal Fabrication	4	1,700	2,857	1,457
Office Buildings / Communications	32	1,500	972	155
Water and Sewer	7	1,400	1,135	784
Sports and Entertainment	13	1,200	721	297
Hospitals	12	1,000	1,056	288
Mining	4	1,000	1,139	843
Saw Mill	3	400	1,152	484
Construction – Smelter	1	400	4,351	1,349
Health Care – Long Term	5	400	965	255
Manufacturing – Asphalt	3	400	849	399
Other	18	1,100	824	227

*For simplicity analysis assumes 1:1 kVA to kW ratio

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