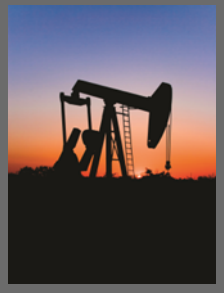


Competitive Energy Services

Energy Markets, Procurement, Green and Sustainability Strategic Planning

Jon Sorenson, President and Chief Operating Officer
January 26, 2015

Presentation Overview

1. Energy Sectors
2. Current Energy Market Conditions
3. Procurement Strategies
4. Issues in NEPOOL
5. Sustainability Options and Opportunities
6. Brief Overview of Competitive Energy Services

Learning Objectives

Upon completion of this program you will be able to:

1. Understand some of the global factors contributing to the Energy Market volatility.
2. Identify local/regional factors influencing supply and price of energy.
3. Ask the fundamental questions that must underpin an energy procurement strategy.
4. Understand some of the options available to groups that wish to diminish their carbon footprint.

Energy Sectors

Energy Sector

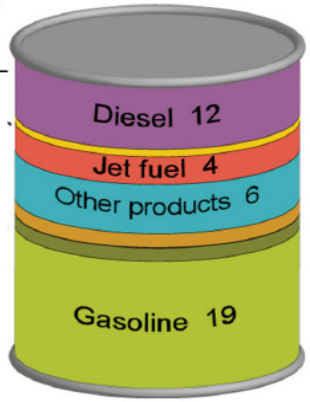
Oil

Oil Market Basics

- Crude oil (what is drilled out of the ground) can be refined into:
  - Heating oil/#2 oil/ULSD
  - Residual fuel/#6 oil
  - Gasoline
  - Other products: diesel, kerosene, jet fuel
  - Propane is a byproduct of the refining process
- Measured in barrels (bbls). One barrel = 42 gallons.
- Two benchmarks:
  - West Texas Intermediate (WTI): American benchmark, stored in Oklahoma, traded on the New York Mercantile Exchange (NYMEX). Most of the inland US follows this benchmark.
  - Brent oil (Brent or "North Sea Brent"): International benchmark, traded on Intercontinental Exchange (ICE) in London. Much of the Atlantic, including the U.S. and Canadian East Coast, relies on this benchmark.

- Demand is seasonal: summer has a higher demand for transportation, winter (specifically in the Northeast), is much higher in the winter months
  - Longer, cold winters can impact the price of heating oil – based on production, storage, and both North American and World Wide demand

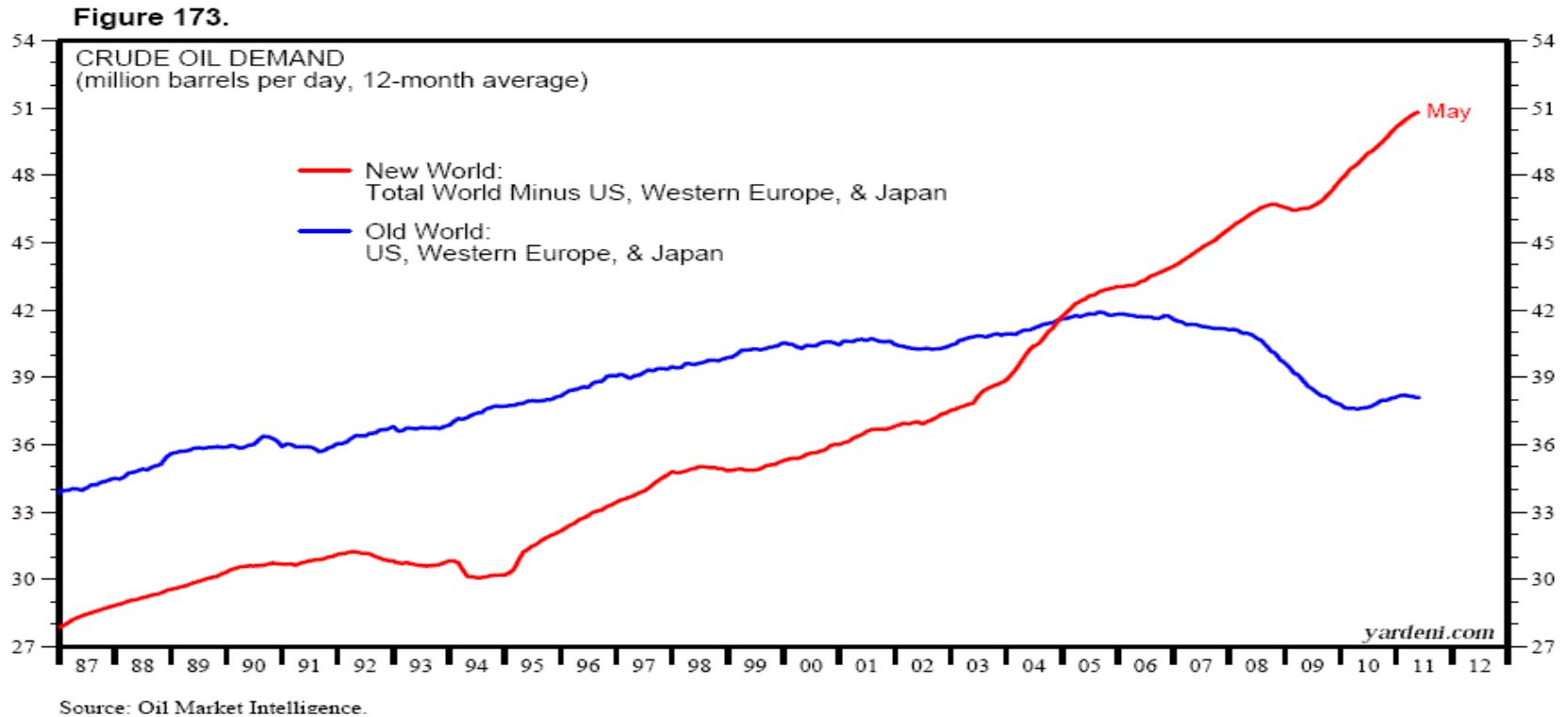
2013 Refinery Output	
Diesel	27%
#2 oil	2%
Jet Fuel	9%
Other	13%
#6 oil	2%
LPG	4%
Gasoline	42%



Shale Oil – North America

Source: U.S. Energy Information Administration based on data from various published studies. Canada and Mexico plays from ARI.
Updated: May 9, 2011

World Demand has changed



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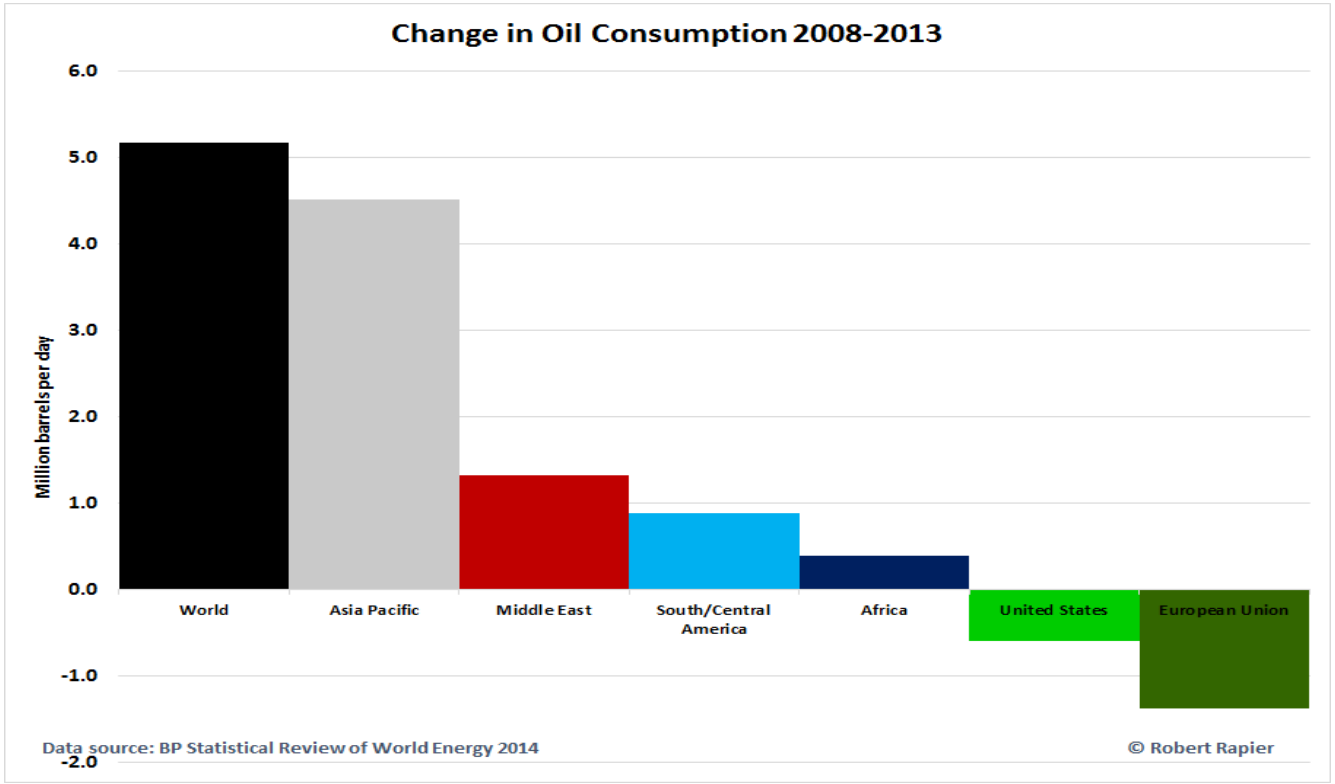
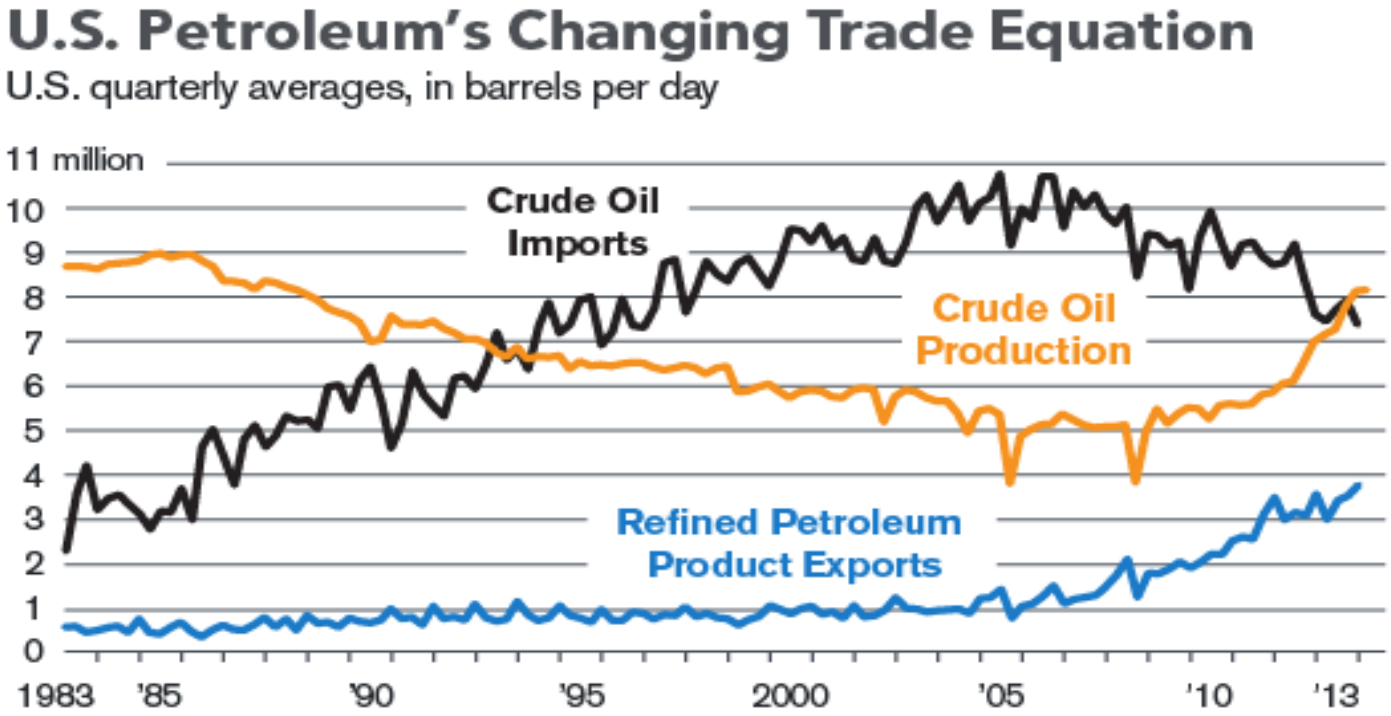
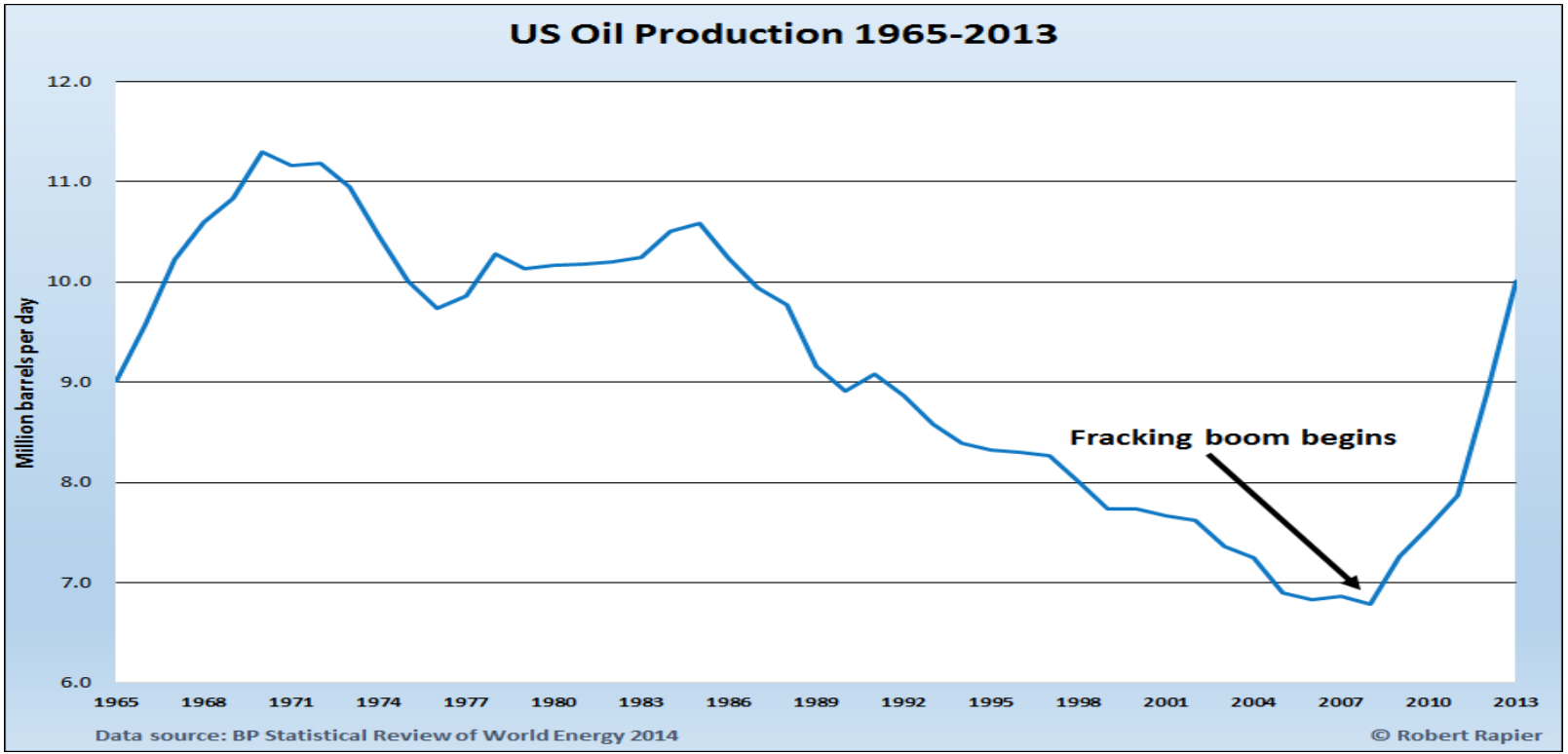


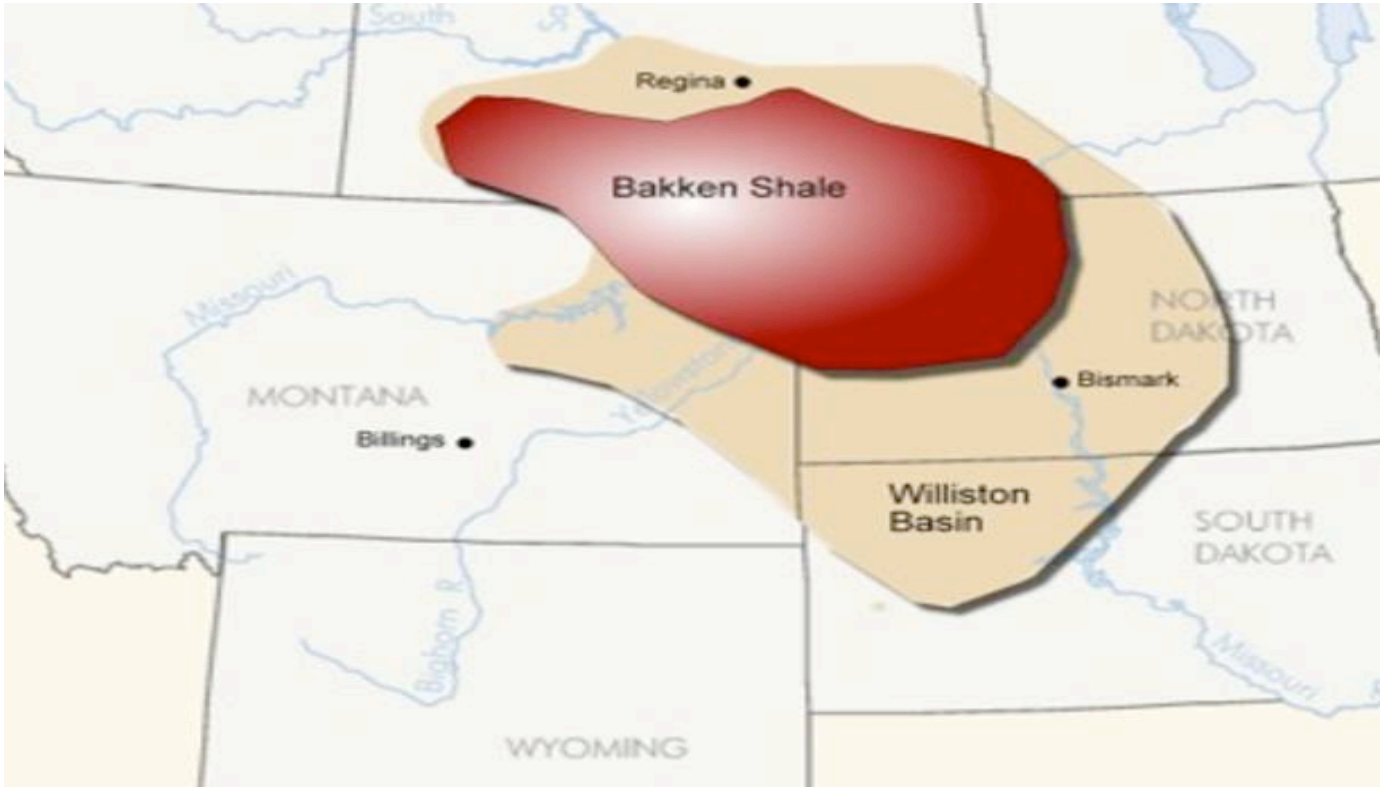
US Oil Picture has changed



US Production Explodes



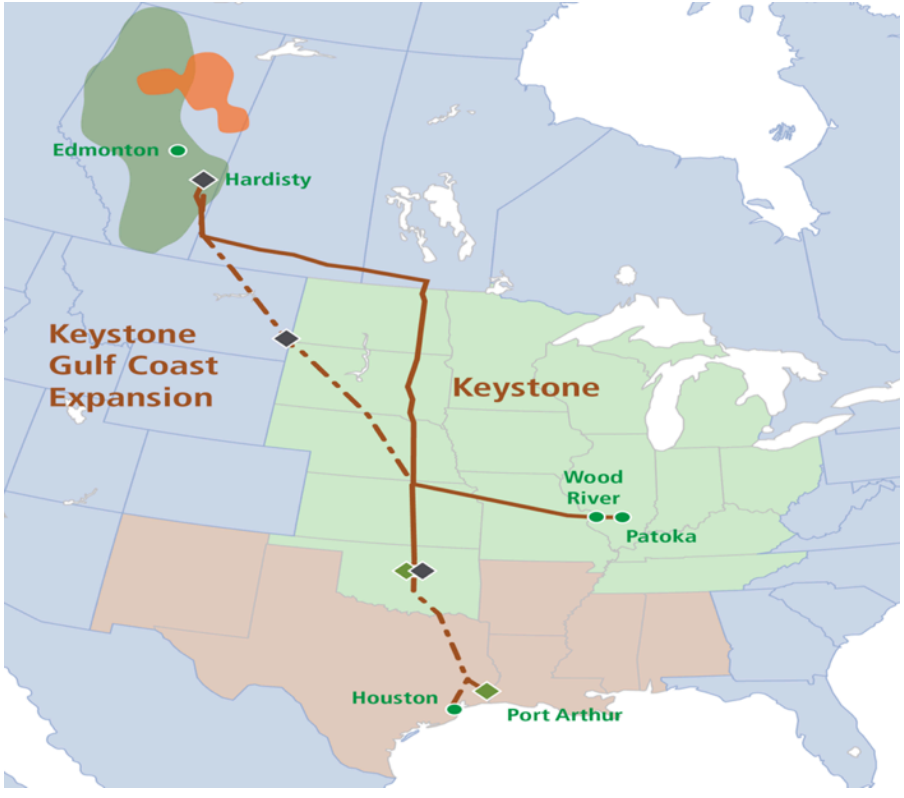
Bakken Shale



Rail or Pipe

Lac Megantic, Quebec

Keystone Oil Pipeline



- Links growing crude oil supply with US refiners
- "Keystone" in service
  600,000 Bbl/day
- "XL" under regulatory review (36 months now), roughly
  700,000 Bbl/day "new"
- 1.3 Million Bbl/day total system
- Critical energy infrastructure creating critically needed jobs
- Keystone XL will create $20 billion of stimulus
- Keystone XL has the ability to reduce US reliance on OPEC crude by 40%

Oil Issues Fundamentals Vs. Technicals

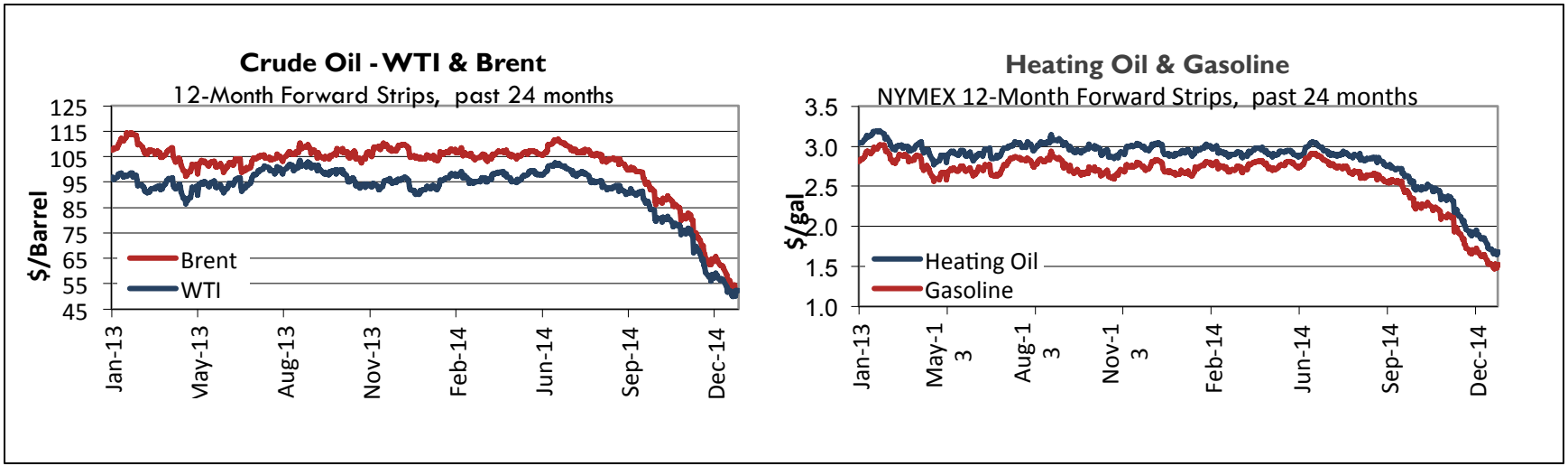
- How much are the financial markets driving prices?
  - **Dollar Value**
    - How much per bbl of oil?
    - Other currencies
      - Euro, Yuan, Loonie
  - **Speculators**
    - Taking positions on both sides of the market – current downside
  - **Hedge Funds, Pension Funds**
    - Positions on oil and commodities instead of monetary based funds
      - Equities vs Commodities
  - **Fundamentals or Financial?**
    - All of the above
    - And Geo-politics

Oil Markets – Now

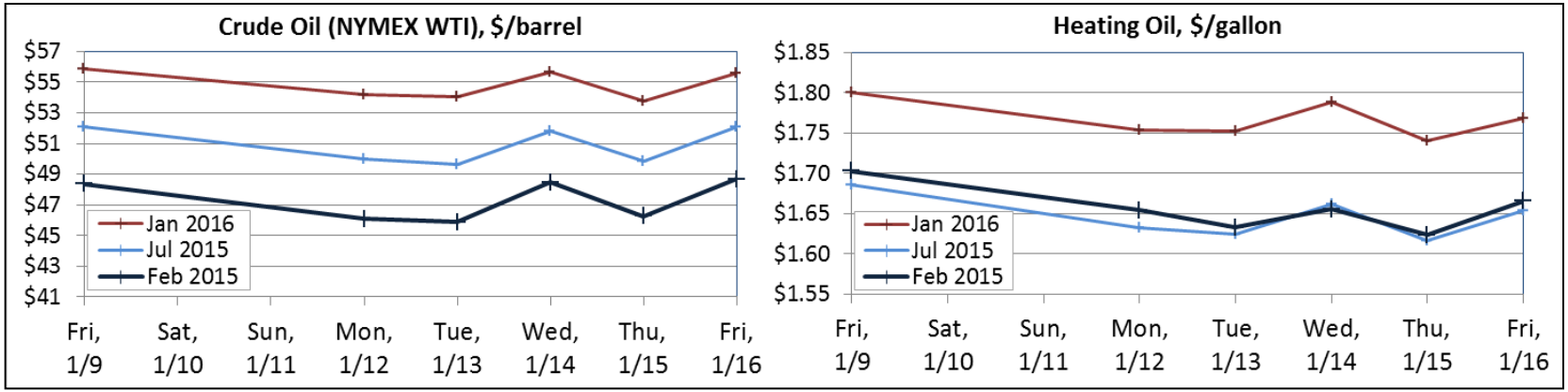
- What can cause change in oil prices?
  - **Demand**
    - World wide demand - Flat in Asia and down in the West
  - **Geo-politics**
    - Russia, Middle East (OPEC), Saudi Arabia
  - **Unrest, Fear, Stress, Speculation**
    - Currently quiet
  - **Japan** – reconstruction and power plants
    - Nuclear coming back on
  - **South America** demand for refined products
    - Flat at this time
  - **Production**
    - Saudi Arabia not curtailing production
    - World Wide Production remains up
    - Crude stocks were high; WTI land locked
  - **Technicals**
    - Economy – slowing down outside US
    - Currency – dollar strong
    - Premium for Brent – no longer exists

Oil Markets

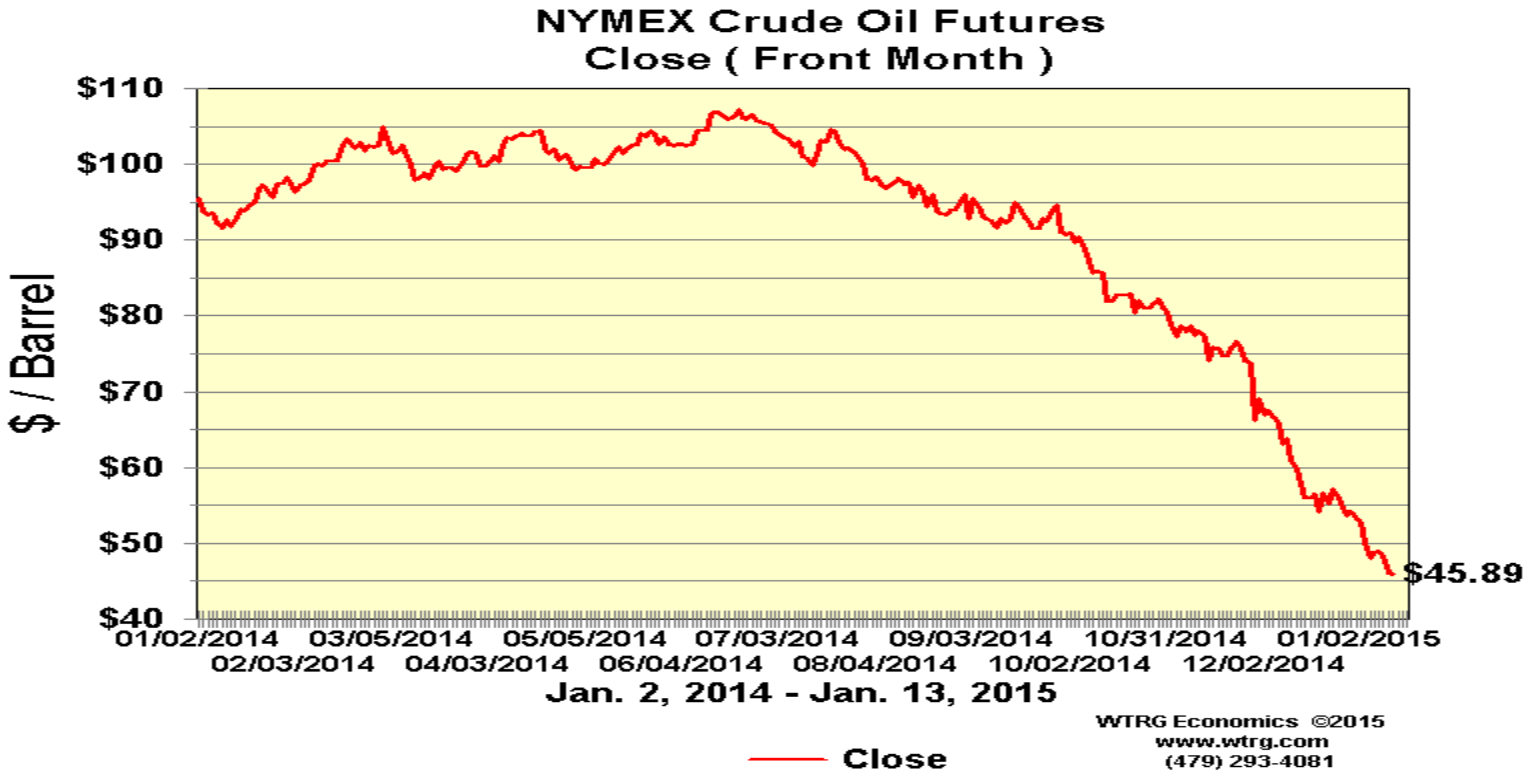
- Crude Oil Futures influence prices of heating (#2) oil, heavy fuel (#6) oil, propane



NYMEX End-of-Day Settlements



Oil Markets – current - NYMEX



Natural Gas

Natural Gas Basics

- Natural Gas: a fossil fuel that is a mixture of hydrocarbon gases (primarily methane) that, when burned, gives off energy with fewer emissions than other sources.
- Byproducts of processing natural gas:
  - Propane
  - Butane, ethane, pentanes
  - Hydrogen sulfide, etc.
- Measured primarily in Decatherms (Dth). Also measured in cubic feet (cf) or potential energy output (Btu = British thermal units).
  - 1 Btu = how much natural gas will produce enough energy to heat one pound of water by one degree at normal pressure
  - 1 cubic foot = 1,027 Btus
  - 1 Decatherm = 10,000 Btu or 9.7 cf

- ***Price in New England is higher than the rest of the country due to a lack of pipeline infrastructure getting cheap supply into the market***

Natural Gas Market Basics

NG Contract Price =

Commodity + Basis + Delivery

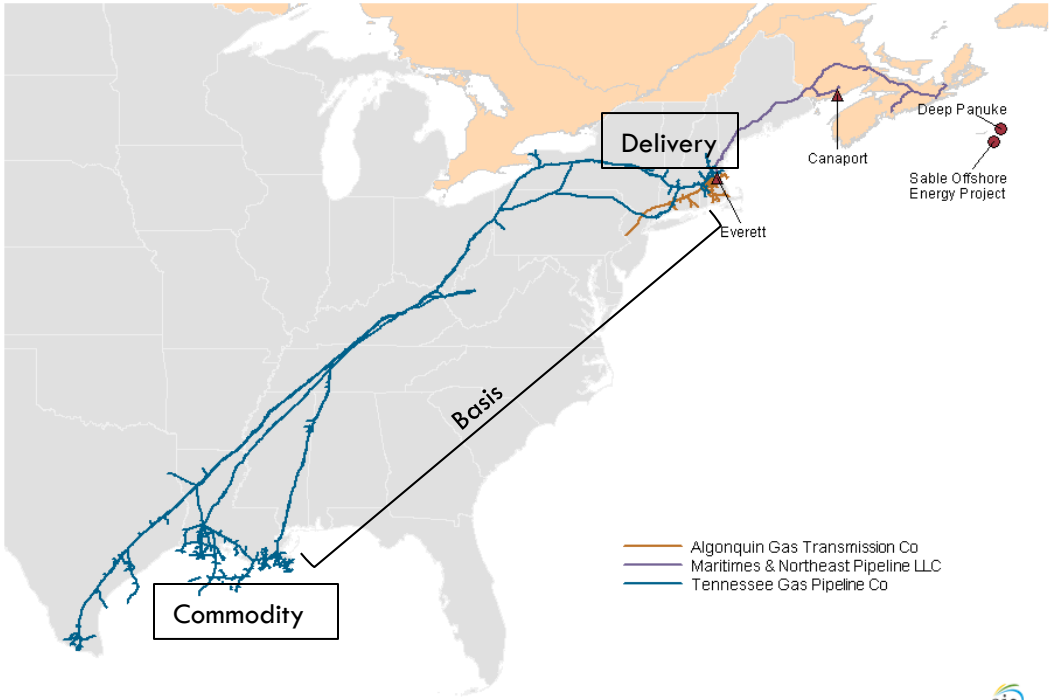
Commodity: the cost of natural gas at the New York Mercantile Exchange (NYMEX) hub in Louisiana.

Basis: the difference in price between the NYMEX hub and at the utility. This price difference is due to the cost to transport the gas through interstate pipelines from the hub to the utility.

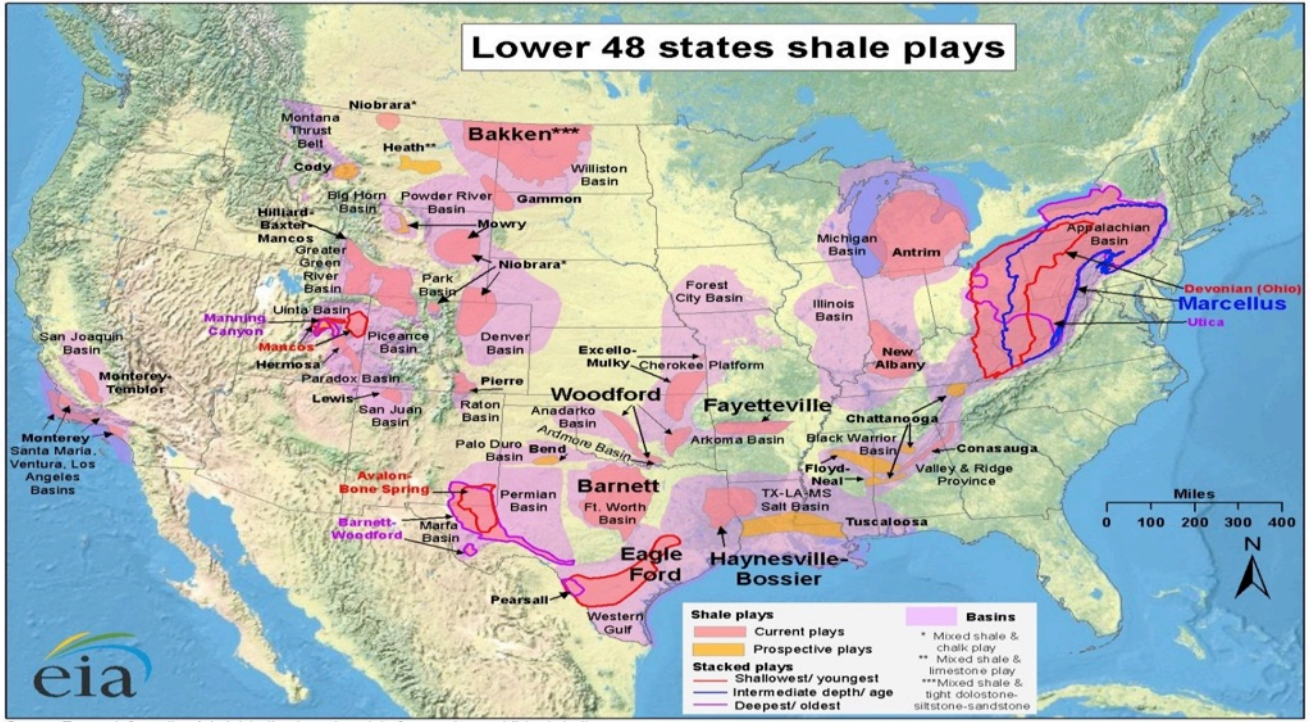
- Basis is fixed for the entire term of the contract. It must be purchased either before or at the same time as commodity.
- Can be 'negative' and decrease your contract price, if demand is weak and supply is high.
- Also known as the 'adder.'

Delivery: this price pays for the distribution of gas from the utility to the customer's location. It is billed as the 'local distribution charge.'

Figure 2. New England natural gas supply system



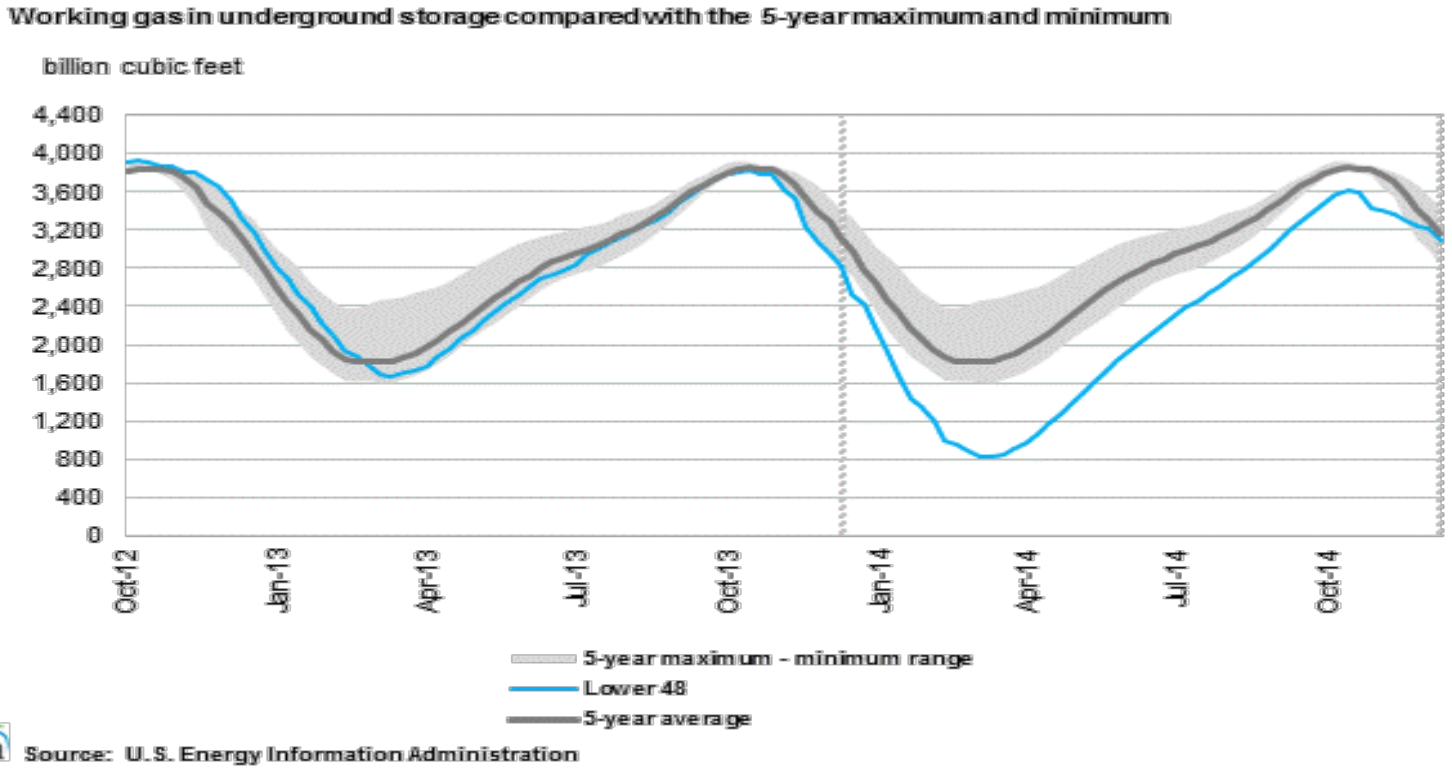
Natural Gas Resource



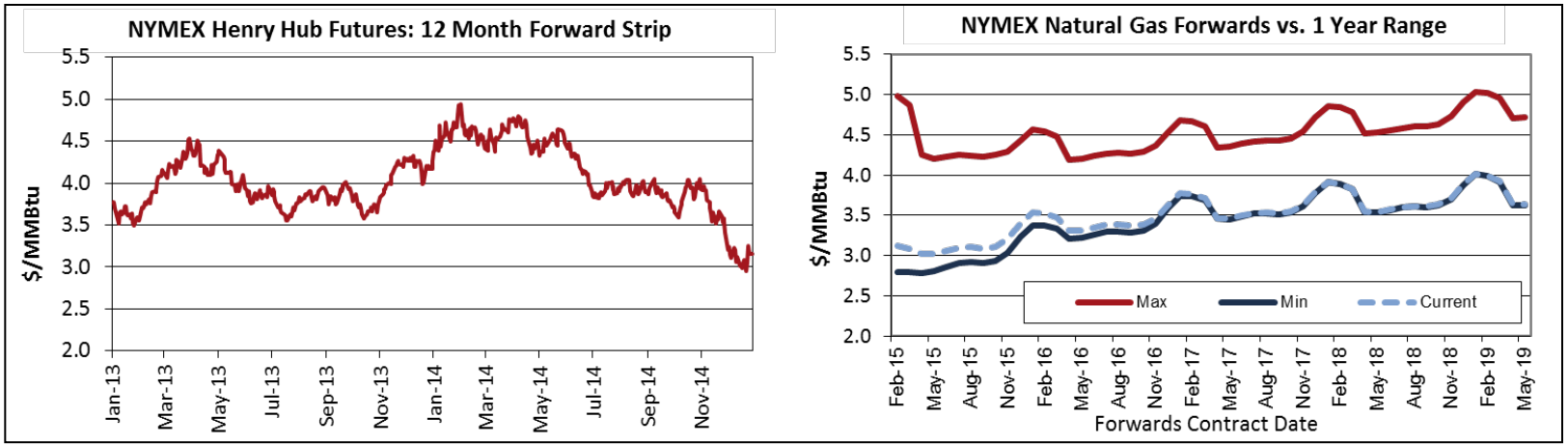
Source: Energy Information Administration based on data from various published studies.
Updated: May 9, 2011

- Total available future supply = 2,718 tcf (EIA-2012)
- Of this, 616 tcf is from new shale gas
- US consumption is 26 tcf per year (EIA-2013)
- Approaching 100 years supply at current consumption rates…

Natural Gas Storage



Natural Gas Markets



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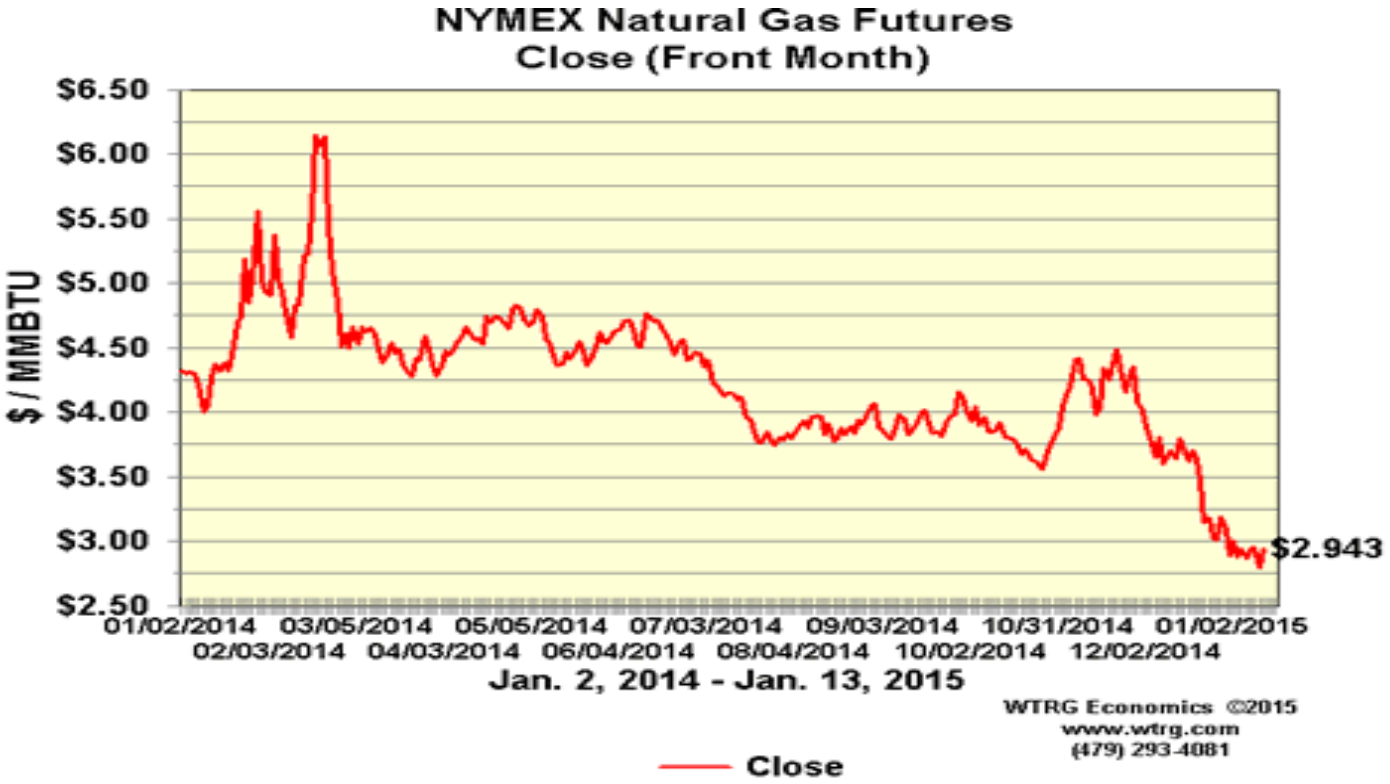
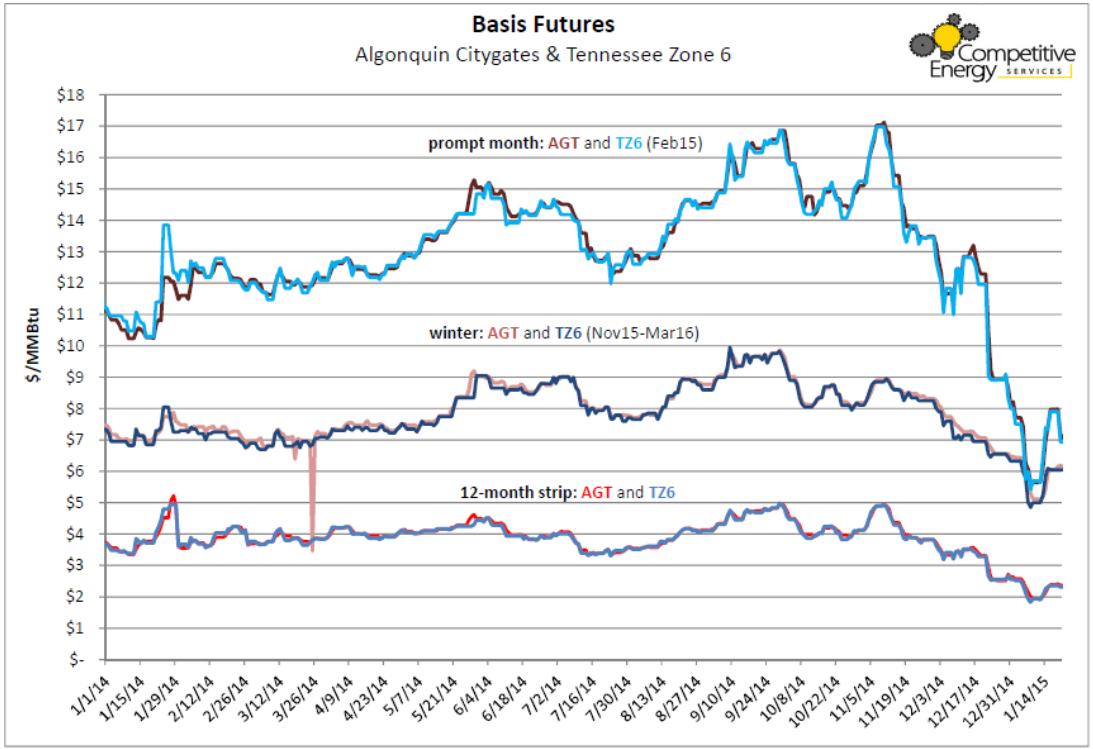
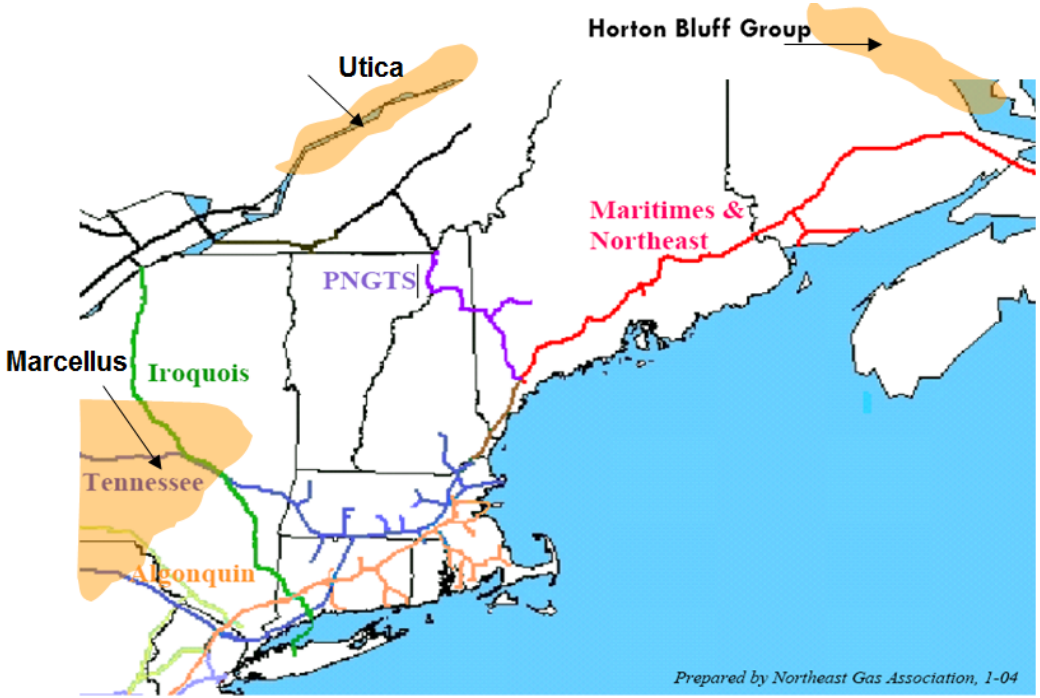


Basis Price Explosion + Volatility

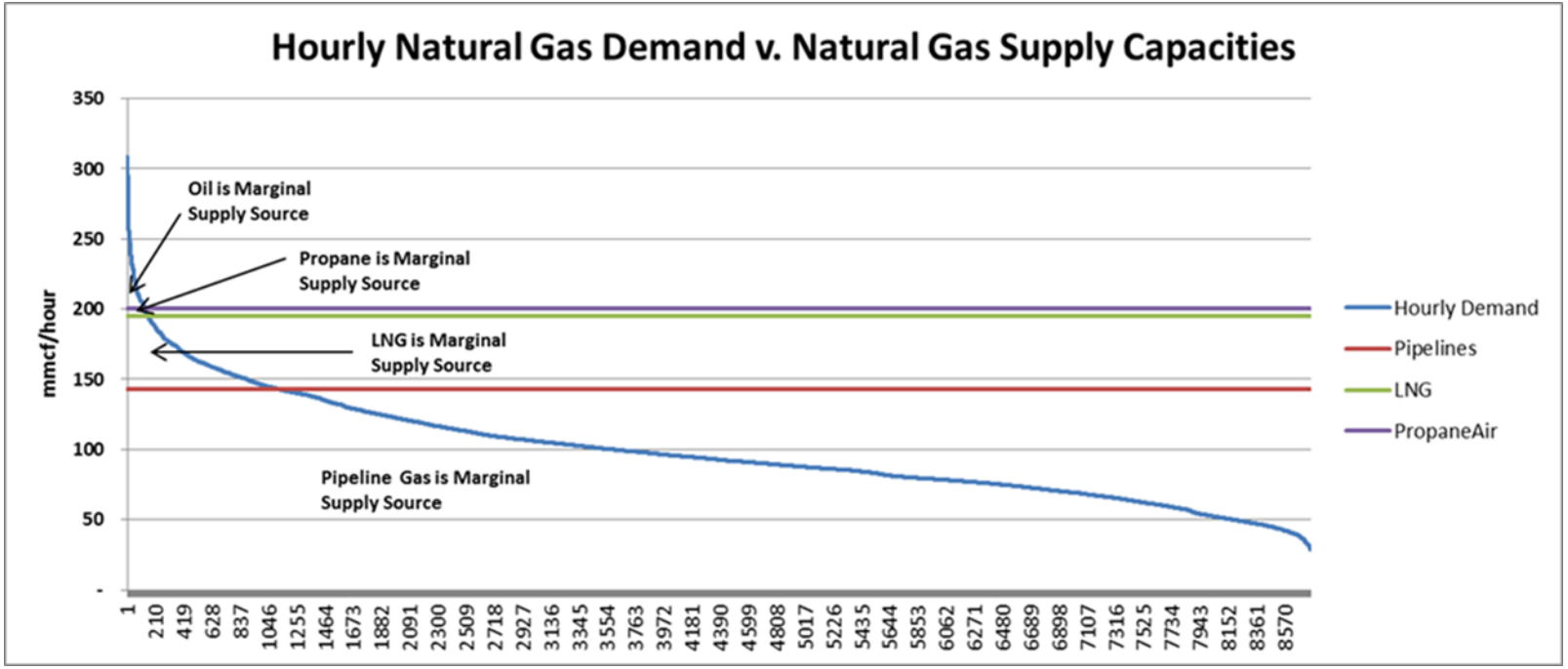


Gas pipeline infrastructure into New England (same for 14 years)

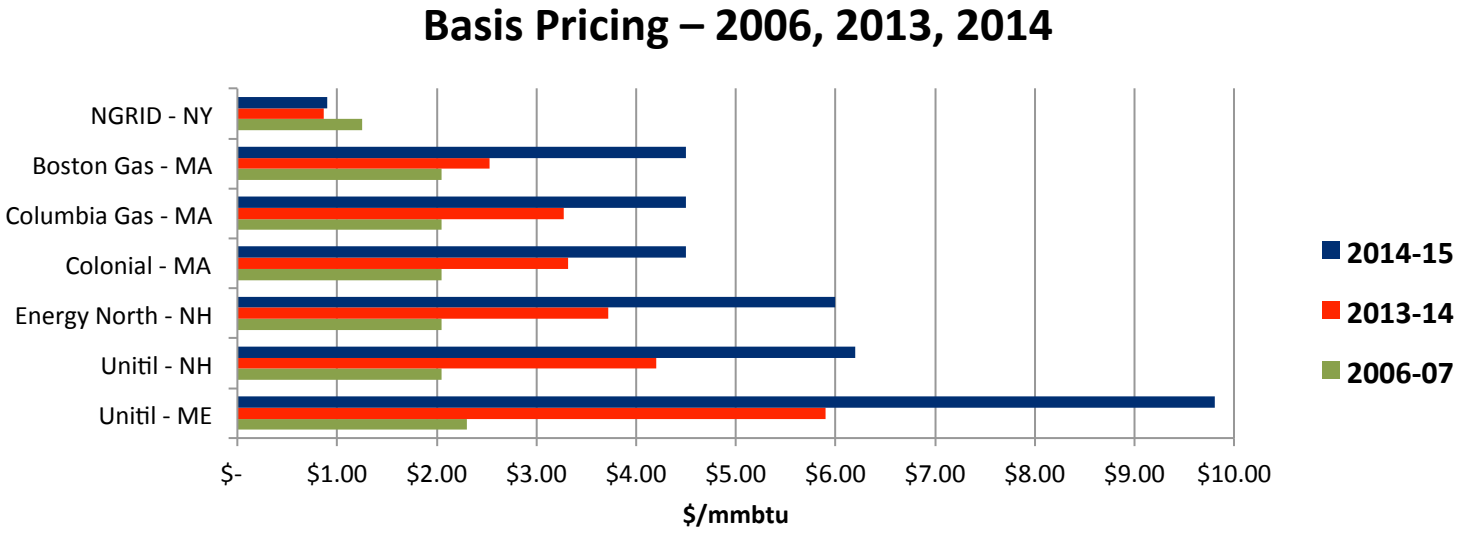


- Existing interstate pipeline infrastructure developed based on gas flows predominantly from
  - US Gulf Coast
  - Western Canada Sedimentary Basin
  - Eastern Canada off shore
- New Shale Developments in Northeast impacting gas flows and basis
  - Marcellus
  - Utica
  - Horton Bluff

Problems Remains Regional Pipeline Constraints—High Basis

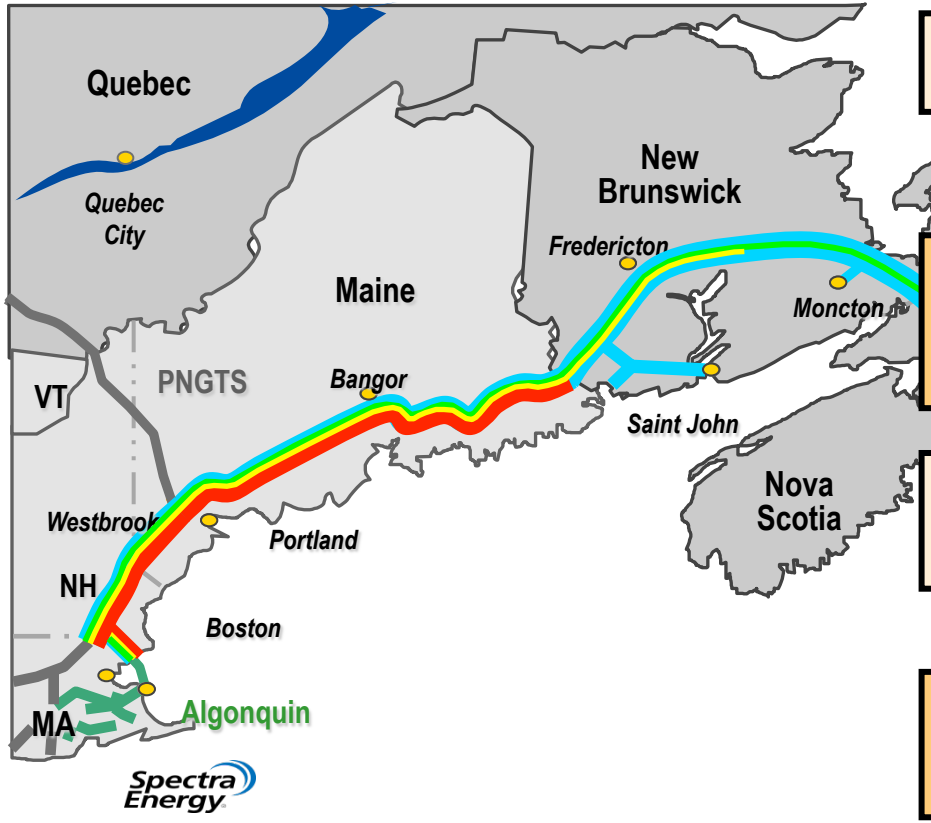


Economic Cost of Pipeline Constraints



Commercial customer with essentially identical facilities behind various LDCs in the Northeast.

North East Energy Trap



Sable
- Producing 140-160,000 dth/day

Deep Panuke
- Producing 175-180,000 dth/day
- Need more maintenance to achieve full production

Corridor
- Production remains between 8,000-10,000 dth/day

Canaport
- November average was 9,300 dth/day

Proposed Pipeline Solutions

- **Algonquin**
  - AIM (2016): 342,000 mmbtu
  - Access Northeast: 1 bcf / day
- **PNGTS**
  - Nov 2018 up to 182,000 mmbtu/day
- **Atlantic Bridge**
  - AIM (Nov 2017): 200-300 mmbtu
- **Tennessee Gas Pipeline Co.**
  - 600,000 scalable to 1.1 bcf/day
    - Nov 2018
- **New England Power Gen**
  - 2017-2019

Canaport LNG St John New Brunswick

Canaport LNG

- 1.2 Bcf/d max sendout
- 10 Bcf storage
- Cargos received
  - Trinidad
  - Qatar
  - Egypt
  - Peru
- Higher the price, higher the sendout
- Have the ability to:
  - Reload ships
  - Presell gas at world prices

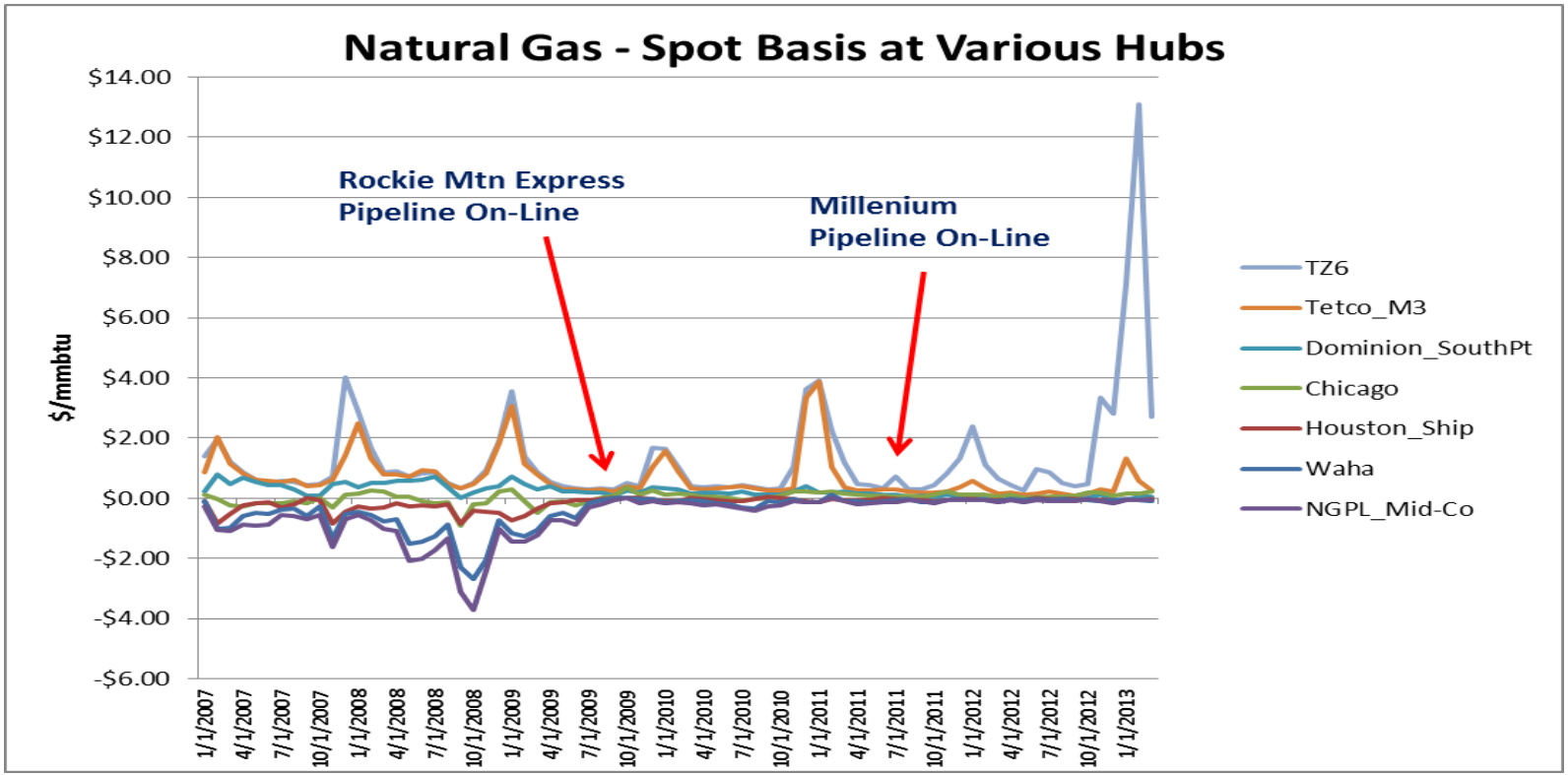
- LNG is Natural Gas Chilled to -265F
- Pressurized to liquid state
- Takes 600 times less space than gas; cheaper and easier to transport

Photo From http://www.canaportlng.com/

LNG Landed Pricing

World LNG Estimated December 2014 Landed Prices

Moving Gas to Markets - Spot



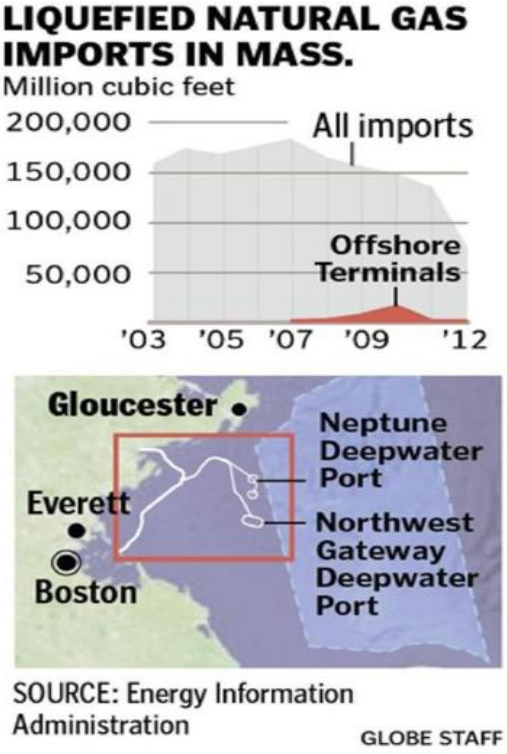
Nat Gas Conclusions - Forward

- US natural gas resource is large and growing
- New shale gas discoveries and drilling techniques should keep prices low in the near and mid term, in regions with adequate supply and infrastructure
- Although pipeline expansion has been proposed, the Northeast currently has inadequate infrastructure to move supply and inadequate supply from Atlantic Canada
- Risks include:
  - Increased regulation to mitigate environmental issues surrounding new fracking techniques
  - Increased demand, power generation, transportation, manufacturing and LNG exports……not in play at his time
  - Lack of infrastructure to move gas into demand centers (Northeast only)

Nat Gas Conclusions - Now

Natural Gas Markets

- Warm Weather – overall – NA wide
- World LNG prices down – 50 percent
- Oil and Propane – 5 and 12 year low
- Spot prices capped despite recent cold
- Prices down both spot and futures

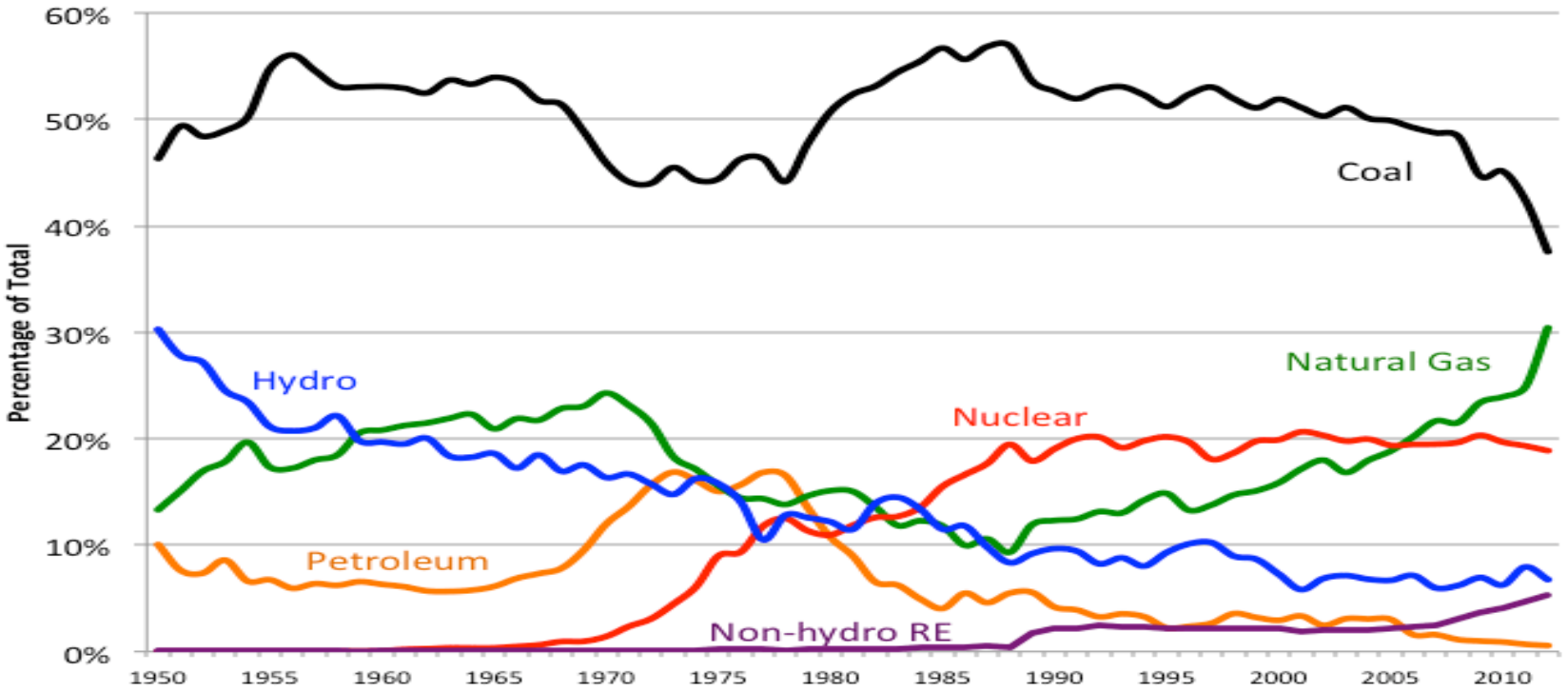


Energy Sector

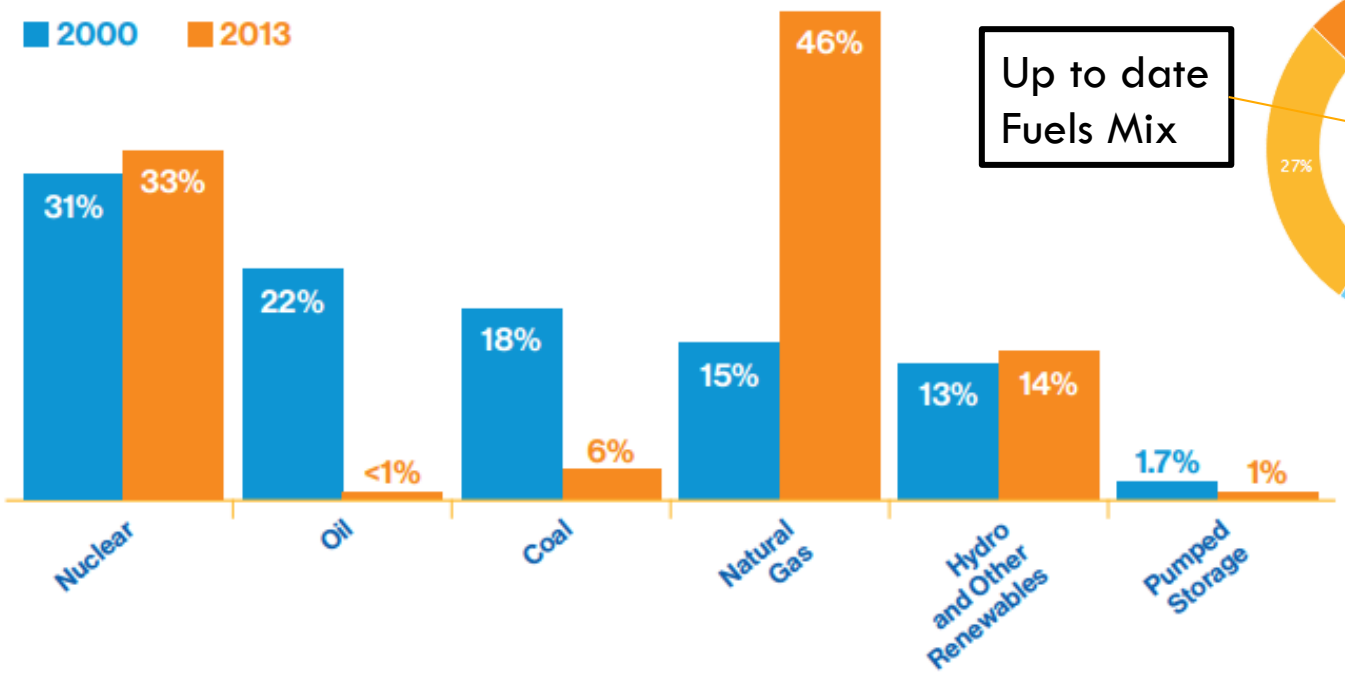
Competitive Energy Services

Power

US Power Mix

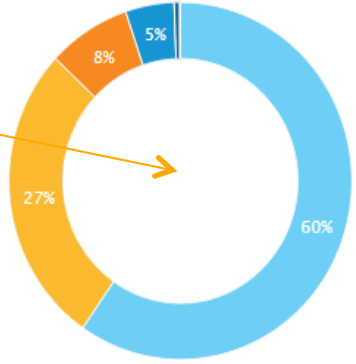

60%
50%
40%
30%
20%
10%
0%
Percentage of Total
1950
1955
1960
1965
1970
1975
1980
1985
1990
1995
2000
2005
2010
Coal
Hydro
Natural Gas
Nuclear
Petroleum
Non-hydro RE

New England Energy by Fuel Type



Information provided by ISO – New England

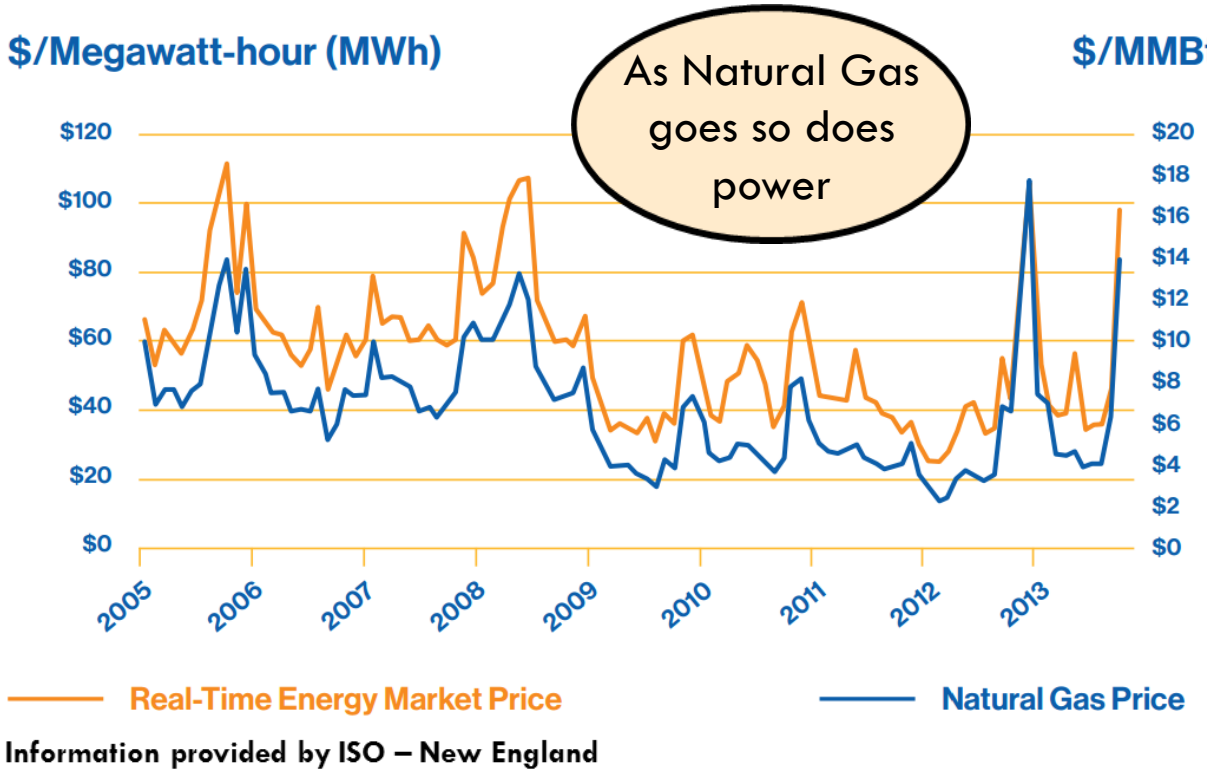
Up to date Fuels Mix



60% NATURAL GAS
27% NUCLEAR
8% RENEWABLES
5% HYDRO
1% COAL
0% OIL

- Significant Increase in Natural Gas
- Nuclear has held constant

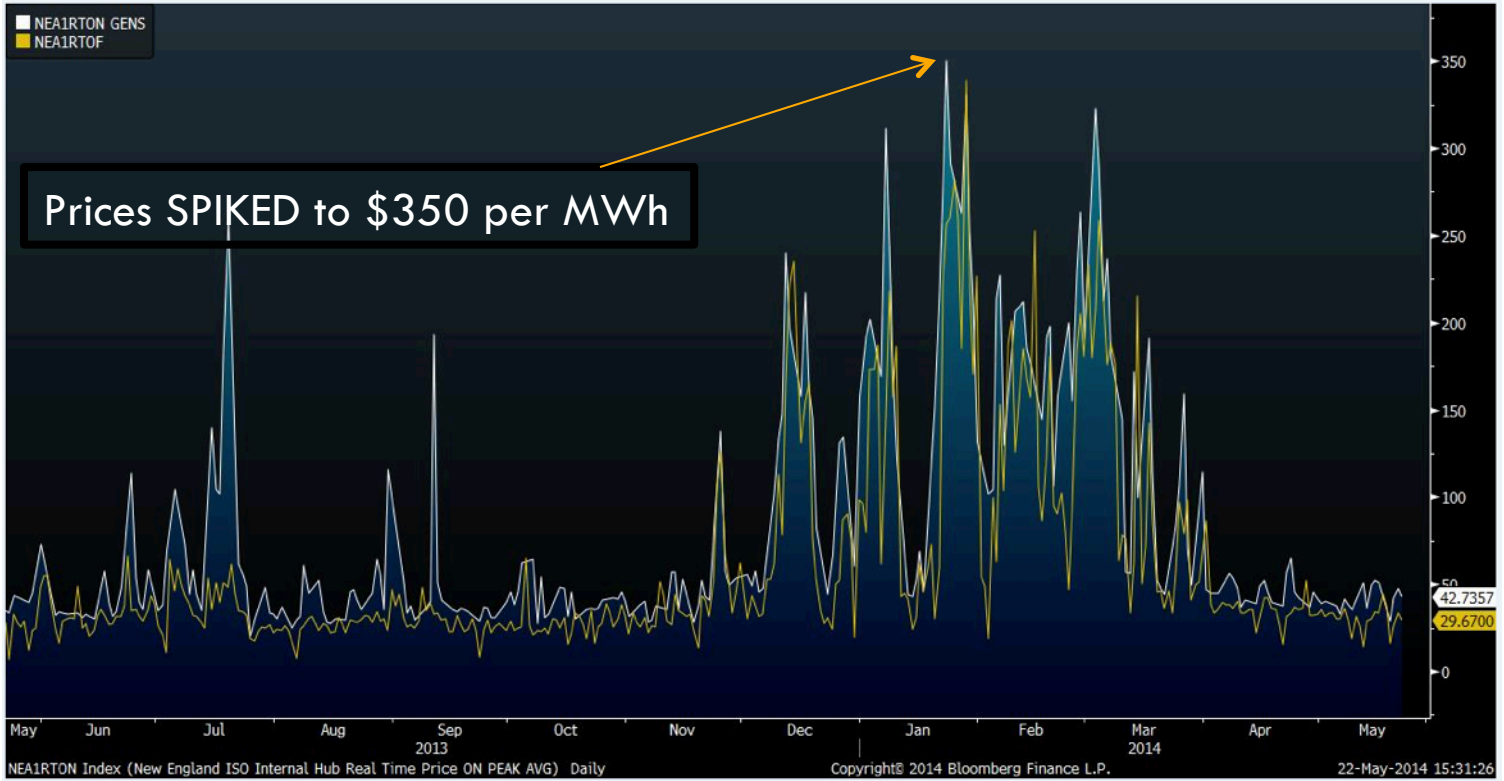
Price of Natural Gas Affects the Price of Electricity



Information provided by ISO – New England

- Heat Rate Increases
- Base load retirements
- Fuel mix (more oil/ LNG)
- Gas Prices (Henry Hub or Basis)
- Restricted supply development
- Factor cost increases (Rig competition)
- Environmental Externalities (e.g., CO2)
- New capacity development
- Renewables
- Distributed Generation
- Gas Prices (Henry Hub or Basis)
- Quebec/Eastern Canadian gas

Electricity – Spot Price Concerns



Electricity Commodity Summary

- The collapse of basis and the futures market in natural gas prices are having an effect on power prices in the near to mid term - downward
- Most proposed new capacity in NE is wind (36%) and natural gas (42%)
- Natural gas dependency causing highly volatile spot prices
- Retirement of nuclear and coal plants will raise prices prior to gas infrastructure being in place

Energy Sector

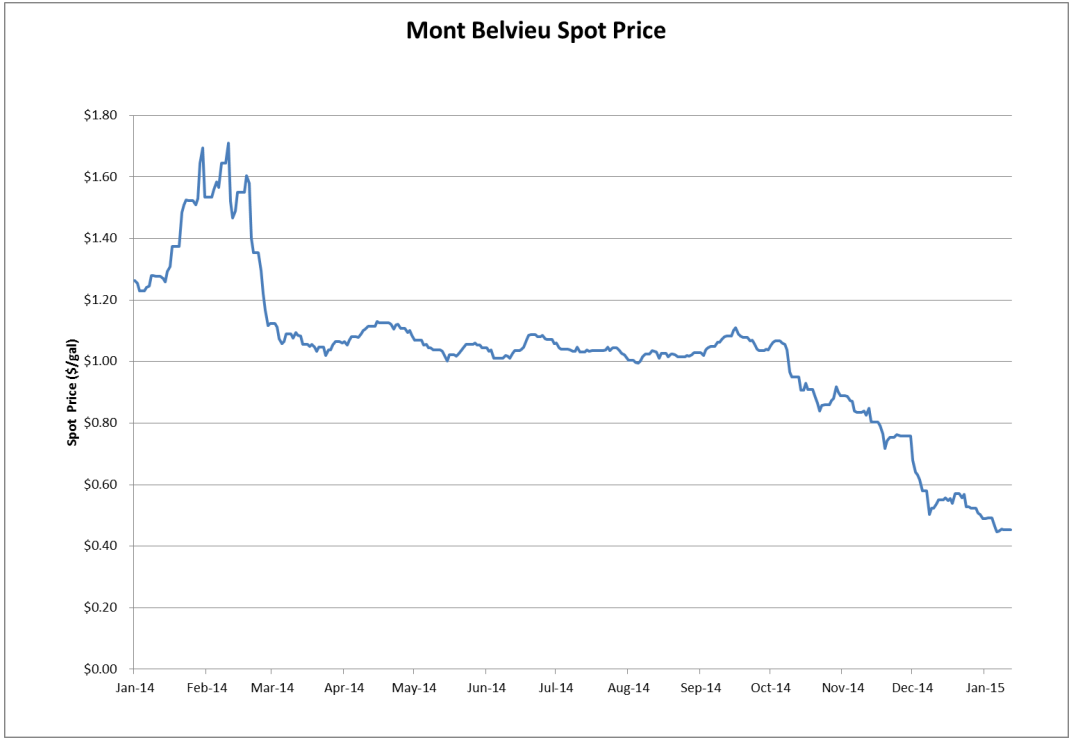
Competitive Energy Services

Propane

Propane Basics

- Propane is a byproduct of natural gas or oil processing.
- 90% of U.S. propane is domestically produced.
- Pricing benchmark for the Northeast is at Mont. Belvieu, TX.
- Stored as liquid, delivered in gallons.
  - Can be converted to cubic feet to compare against natural gas.
- Propane contains over twice the usable energy content per cubic foot than natural gas, yet natural gas is usually still more cost effective.
- Measured primarily in Decatherms (Dth). Also measured in cubic feet (cf) or potential energy output (Btu = British thermal units).
  - 1 Btu = how much propane will produce enough energy to heat one pound of water by one degree at normal pressure
  - 1 gallon = 91,500 Btu
  - 1 cubic foot = 1,027 Btu
  - 1 Decatherm = 10,000 Btu or about 9.7 cf
- Not classified as a greenhouse gas, as it will not harm the environment if released into the atmosphere.

Propane


Mont Belvieu Spot Price
Spot Price ($/gal)
$1.80
$1.60
$1.40
$1.20
$1.00
$0.80
$0.60
$0.40
$0.20
$0.00
Jan-14
Feb-14
Mar-14
Apr-14
May-14
Jun-14
Jul-14
Aug-14
Sep-14
Oct-14
Nov-14
Dec-14
Jan-15

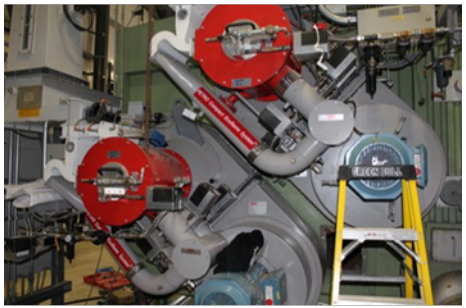
Propane Conclusions

- Viable Alternative to Oil
- Supply Disruption in North East
- Tank Ownership
- 2 – 3 year contract term is optimum
- Less Transparency

Biomass

Biomass Basics

- Biomass is biological material derived from living, or recently living organisms.
  - Energy sources include wood, fibers from plant and animal material, and agriculture and municipal waste.
- Pellets
  - Not price competitive with pipeline natural gas, but is on par with propane
  - Very price competitive with #2 and residual oil
  - Be careful of packaged proposals including both supply and equipment
  - Be aware of additional loads (electric) not priced into system
  - Maintain fuel flexibility if possible
- Wood Chips
  - More expensive capital costs than pellets (2-3x)
  - Less expensive fuel



The Jackson Lab – Wood Pellets

Current Energy Market Conditions

Current Energy Commodity Values

*Does not include delivery costs

	$/MMBtu
#2 Oil	11.77
#6 Oil	6.42
Prop.	5.32
Nat Gas	2.88

Other Commodities	
LNG/CNG	$12/14
Pellets	$10/12
Biomass	$5/8

Procurement Strategies

Procurement Strategies

- Understand your risk tolerance
  - Risk vs reward
  - Costs for insurance
- Make a market assessment
  - High prices
    - How high?
    - Relief
    - Market Intelligence/Forecasts
- Finance – internal discussion
  - Budget Assurance
  - Political Management
- Product Discussion
  - Electricity – fixed, heat rate, block and index, index
  - Natural Gas – fixed, dailies, combinations
  - Oil/Propane – spot and future market adders
  - All products – hedge, hybrid vs spot
- Terms
  - Long
  - Mid
  - Short

Electricity Procurement Strategy

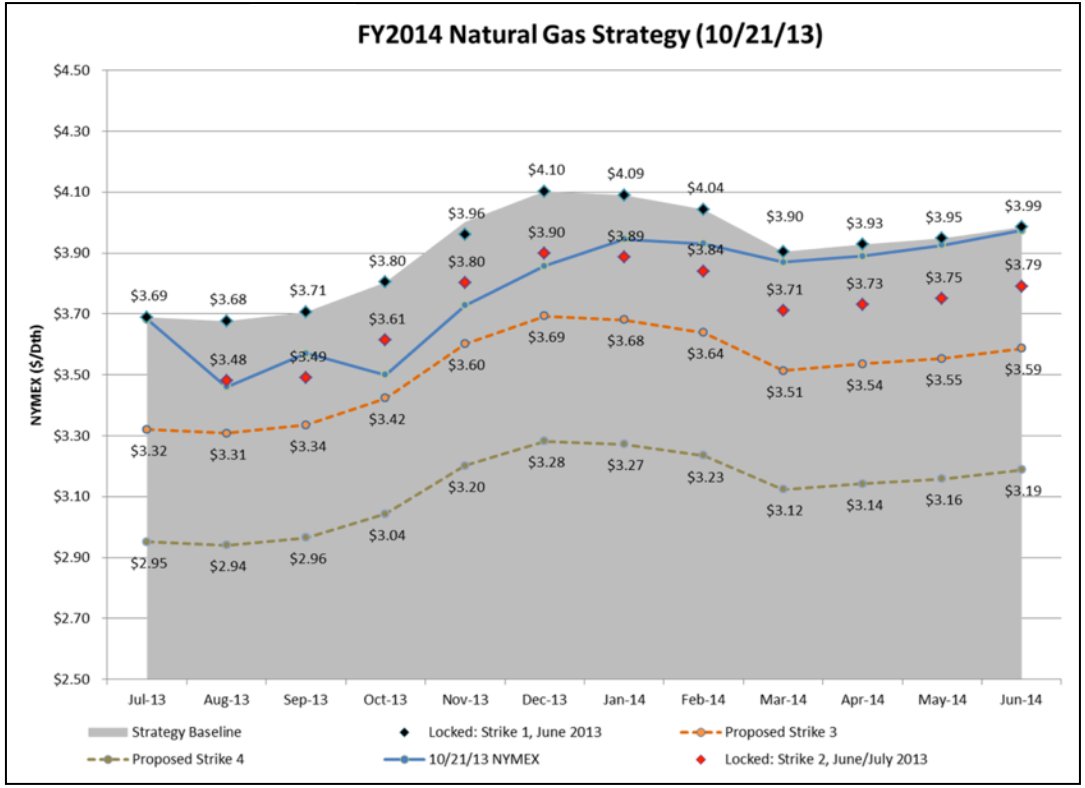
- Product Options Evaluation
  - Real Time Spot Pricing
  - Heat Rate Index
  - Block and Index
  - Hybrid
  - Bandwidth Limited
  - Fixed price, Fixed Term (Full requirements service)

Decreasing Levels of Risk

Natural Gas Pricing Options

- Natural Gas
  - Basis
    - Price above an indexed price, typically NYMEX
      - Load following, balancing, capacity, margin
  - Fixed Price
    - Set or allotted amount of gas
    - Swing – up or down based on variance and either daily or monthly settlements
    - Full load or percentage of load
  - Variable
    - Market based – monthly settlement, typically NYMEX
  - Daily
    - Ride the market; Daily settlement at a liquidity or reference point

Natural Gas Hedging Strategy



Oil and Propane Procurement Strategies

- Oil and Propane
  - Market based
    - Buy fuel and pay the price at the time of either purchased or delivered
  - Lock or fixed
    - Lock in a certain amount of load
      - Monthly, annual or seasonal
  - Hedging
    - Base load for certain terms
    - Over lay market product or other products
  - Btu contracts
    - Gas vs. Oil
    - Arbitrage

Procurement Summary

- **For Any and All Energy Products**
  - Market monitor – watching and viewing have become ***critical***
  - Don't panic – energy markets are volatile
    - Gain knowledge of all prevailing issues
  - Maximize competition with robust competitive bid
  - Compare apples to apples
    - Supplier agreements are not consistent
  - Contract Terms & Conditions are important
  - Regulatory changes are important
    - MA – Solar RPS; ISO-NE winter reliability; Natural Gas OFO (Operational Flow Order)
  - Maximize transparency of all pass throughs
  - Explore different term lengths and contract types
  - Repeat the process often

Issues in NEPOOL

Ongoing issues in NEPOOL

- **NEPOOL: New England Power Pool**
- **Five ongoing issues in NEPOOL that are having an impact on the electricity prices:**
  - Pipeline Capacity Issues
  - Forward Capacity Markets (FCM)
  - Transmission Upgrades
  - Regional Greenhouse Gas Initiative (RGGI)
  - ISO-NE Winter Reliability Program

Forward Capacity Market

FCM (Formerly LICAP)

- Incentives for generators to build new capacity in congested areas (MA/CT)
- Also incentivizes end users to shed load during peak
- FCM Charges (Not including reserve margin)
  - ✓$4.50 kW/month – 6/01/10 – 5/31/11
  - ✓$3.60 kW/month – 6/01/11 – 5/31/12
  - ✓$2.95 kW/month – 6/01/12 – 5/31/13
  - ✓$2.95 kW/month – 6/01/13 – 5/31/14
  - ✓$3.21 kW/month – 6/01/14 – 5/31/15
  - ✓$3.43 kW/month – 6/01/15 – 5/31/16
- Charges for customers range from $0.005 to $0.015 per kWh
- System Peak or OP4 Events
  - ✓Set August 2nd – 1:33pm hour EST – **2006** (1400); Set August 3rd – 2:43pm hour EST – **2007** (1500); Set June 10th – 4:00pm hour EST – **2008** (1600); **2009** – 2pm – August 18th; **2010** – set on July 6th @ 3pm; **2011** – set on July 22nd @ 3pm

Transmission Upgrades

- Transmission charges are embedded in rates charged for "Delivery Service" – Open Access Transmission Tariff or OATT
- OATT charges are the same regardless of where you obtain your electricity.
- OATT charges have been relatively small to-date – less than $10/MWh for all customers

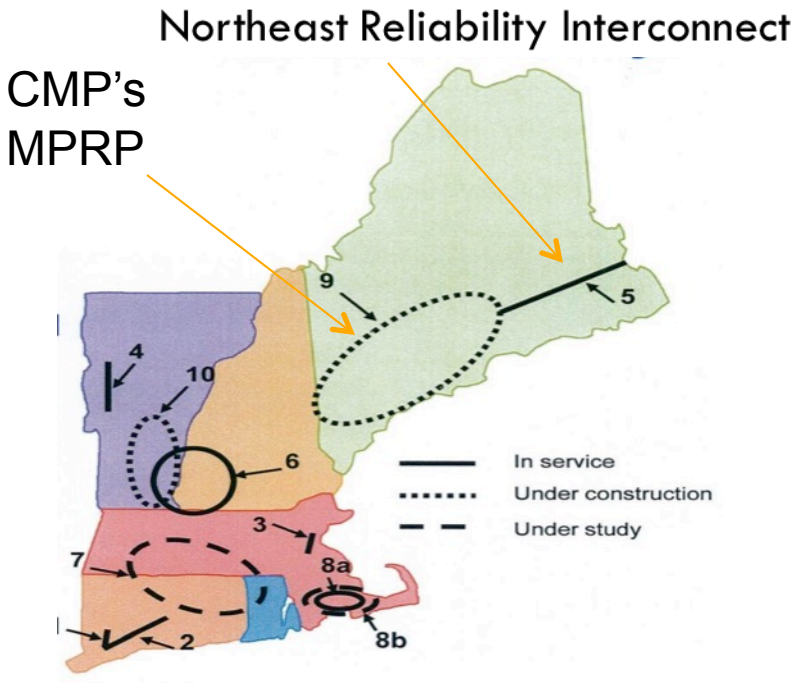


Chart by ISO – New England

Transmission Upgrades … 2

- There are significant transmission upgrades and expansions that ISO-NE has approved – up to $10.0 billion.
- Most of these are designed to improve reliability in CT, VT and MA and to move less expensive power to customers in these regions.
- Cost of upgrades is "socialized" across all load in NEPOOL – OATT rates are projected to increase by 80% over the next few years.

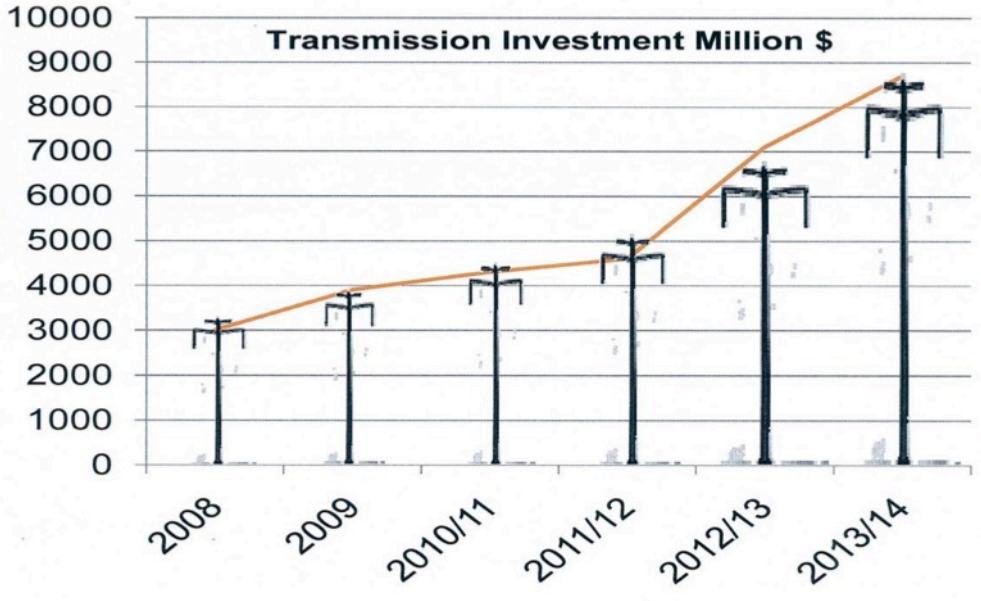
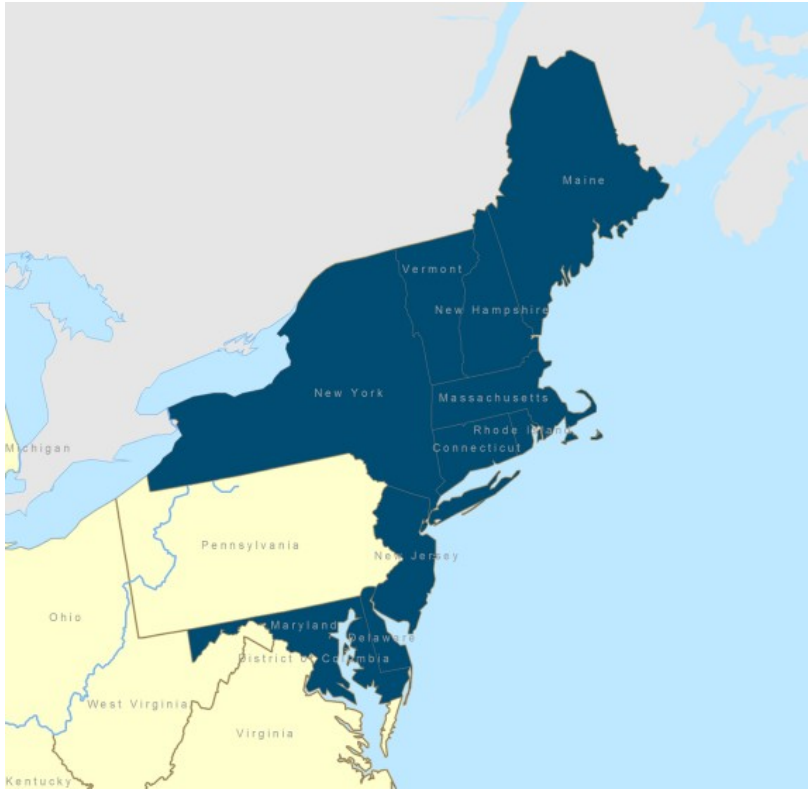
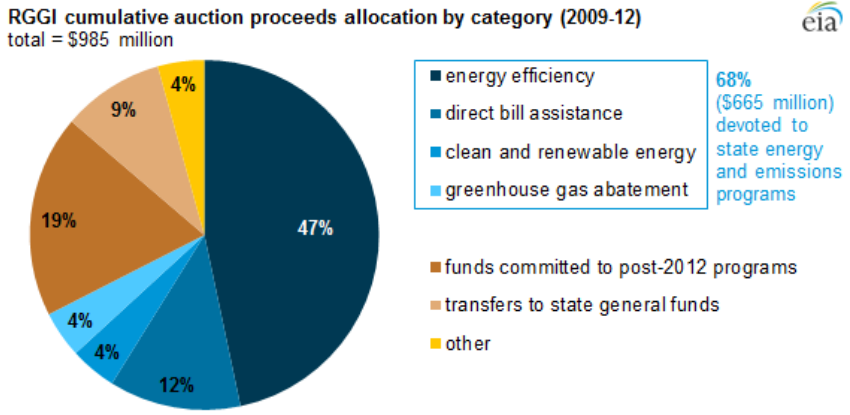


Chart by ISO – New England

Regional Greenhouse Gas Initiative (RGGI)

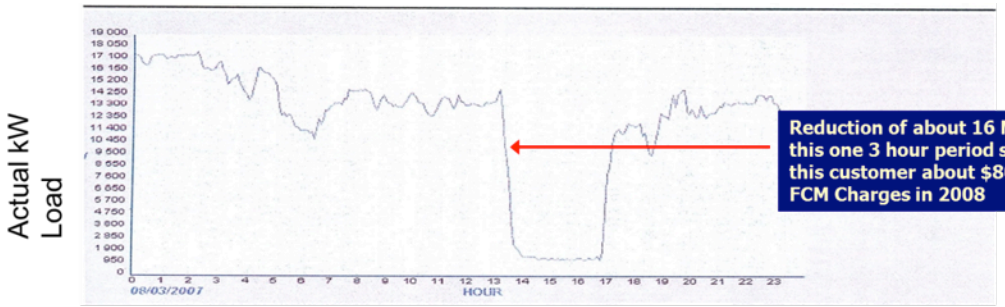


- **Carbon Cap & Trade Program**
- **9 States**
  - **NJ Terminated 2011**
- **25 Auctions Through Sep 3, 2014**



Load Response Program (ISO-NE)

- Revenue program – compensation for agreeing to reduce load
  - Winter & Summer Audits and/or Actual Events
  - Revenue based
  - FCM tag is reconstituted
- CES Self Help Program
  - During ISO event shed load to reduce capacity tag
  - Cost Containment
- Issues to consider
  - Grid parallel
  - Air Emissions
  - Liability



ISO-NE Peak Load for 2007 set at HE 15 on August 3rd

Sustainability Options and Opportunities

CES Sustainability Initiatives (1)

- Non-Traditional
- Procurement
  - Renewable Energy
    - Direct to generator (PPA)
    - By Wire (Supplier)
    - Renewable Energy Credits
    - Carbon Offsets
  - Demand Response & Efficiency
  - Biomass & Biofuel
- Management
  - Cogeneration
  - Active Fuel Arbitrage
  - Efficiency Services

Westford Solar; Beaver Ridge Wind; Worumbo Hydro

CES Sustainability Initiatives (2)

Bowdoin College: Thorne Dining Solar Thermal – Brunswick ME
1,920 SF, $100,000 in Grant Assistance

Analysis / Consulting

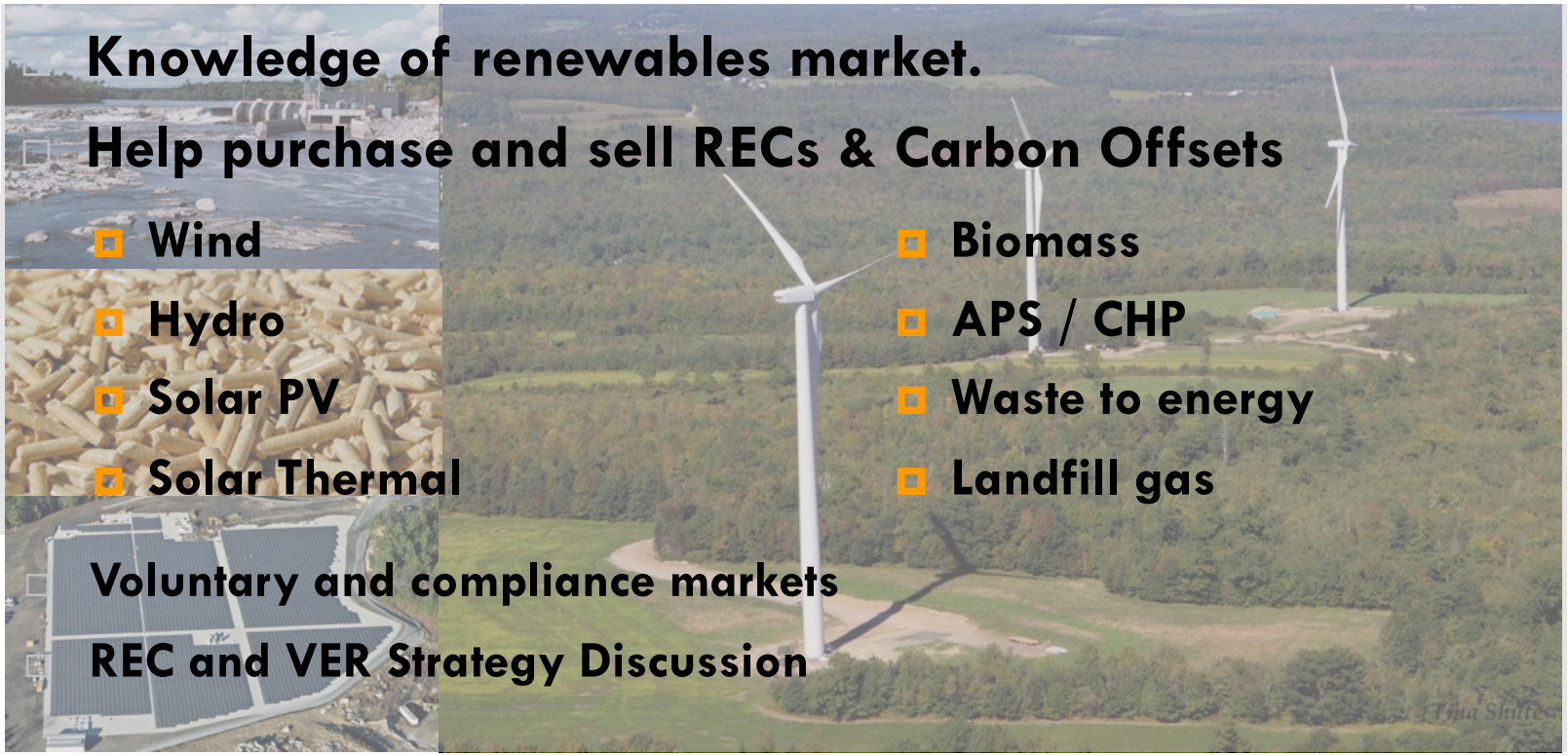
- Renewable Energy
- Onsite Generation
- Wind
- Solar Thermal
- Solar PV
- Biomass
- Cogeneration
- Fuel Conversion
- LNG Systems
- Grant Assistance

Planning

- Grant Assistance
- Carbon Footprint Benchmarking
- Carbon Reduction Planning
- Carbon Footprint Monitoring
- Master Plan

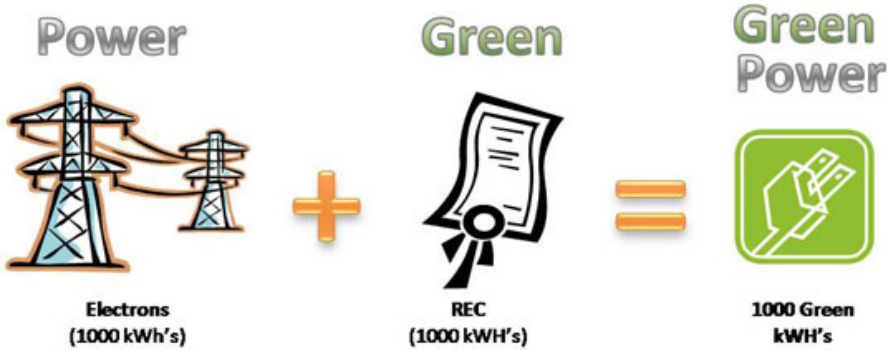
Renewable Energy: Credits & Offsets

- Knowledge of renewables market.
- Help purchase and sell RECs & Carbon Offsets
  - Wind
  - Hydro
  - Solar PV
  - Solar Thermal
  - Biomass
  - APS / CHP
  - Waste to energy
  - Landfill gas
- Voluntary and compliance markets
- REC and VER Strategy Discussion



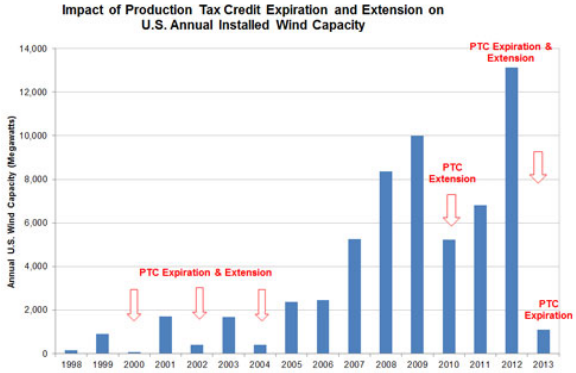
RECs

- REC: Renewable Energy Credit
- An intangible record that is created at the same moment as physical electricity
  - Can be sold separately or together
- One REC for every 1 MWh
- Since every electron, once it reaches the grid, is the same no matter how it was generated, RECs give incentives to create renewable energy

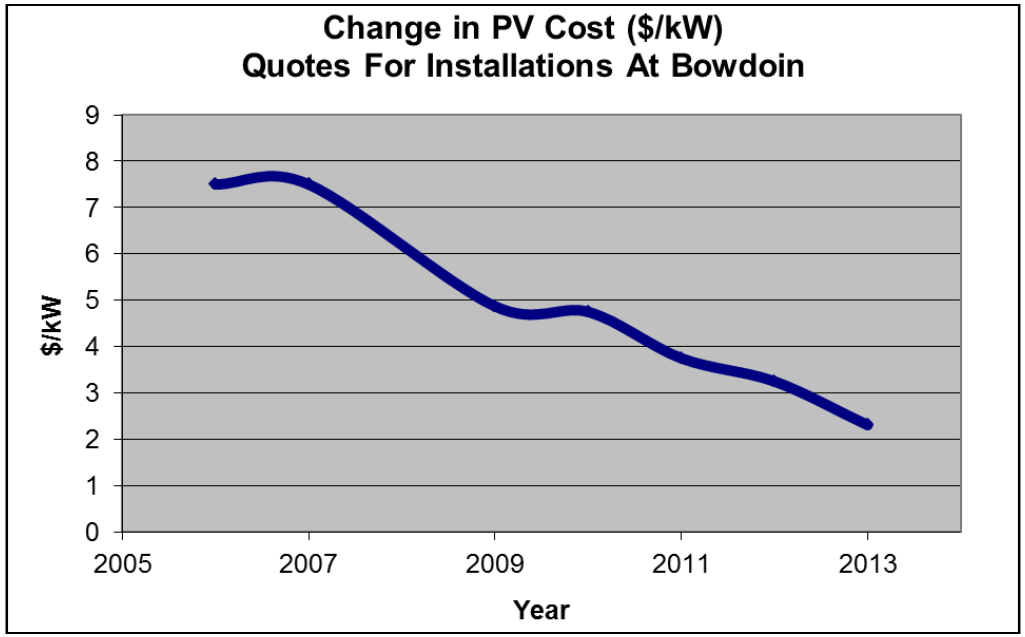


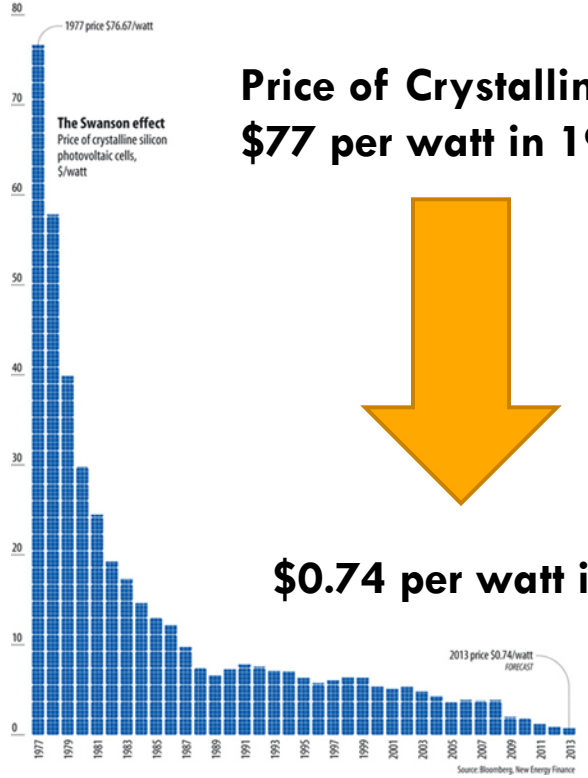
Wind Power

- Between August 2013 and August 2014, electricity produced from wind power in the U.S. totaled 4.33% of all generated electrical energy.
- U.S. wind companies installed 1,254 MW in first three quarters of 2014
  - First Wind, Iberdrola, Exergy
- Production Tax Credit (PTC)
  - 2.3 cents / kwh for the first 10 years
  - Expired 1/1/14



Solar PV Trends (1)



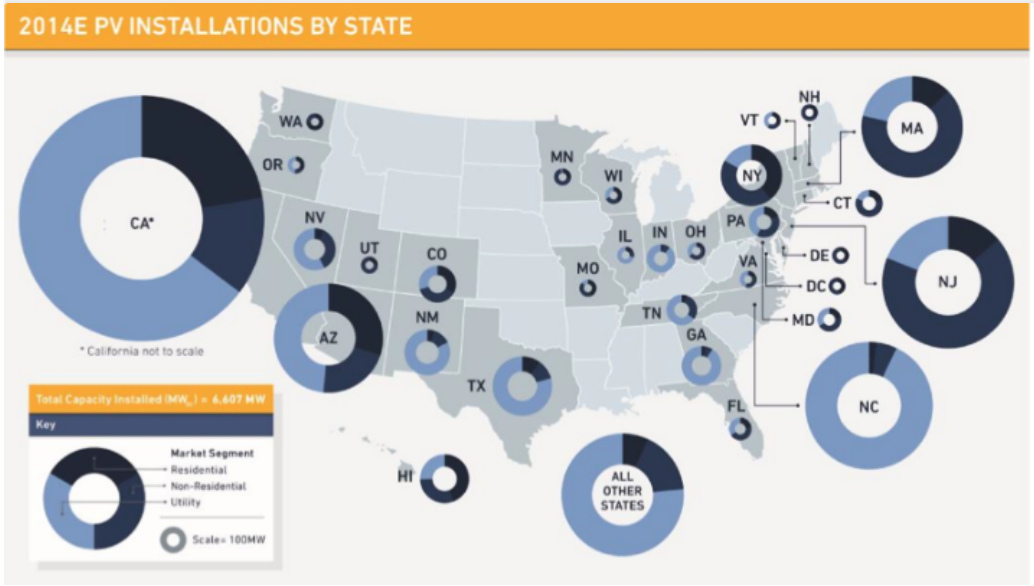


Price of Crystalline Silicon
$77 per watt in 1977

$0.74 per watt in 2013

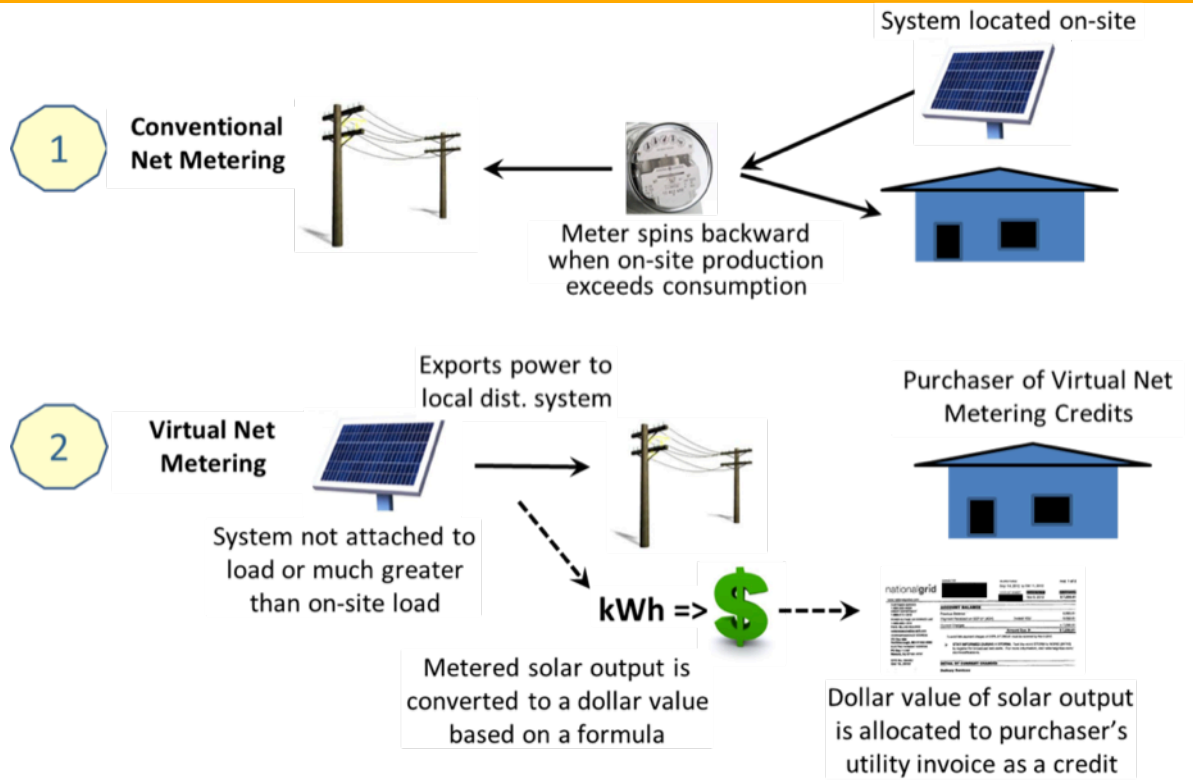
Solar PV Trends (2)

Figure 2.12 PV Installation Forecast Map, 2014E

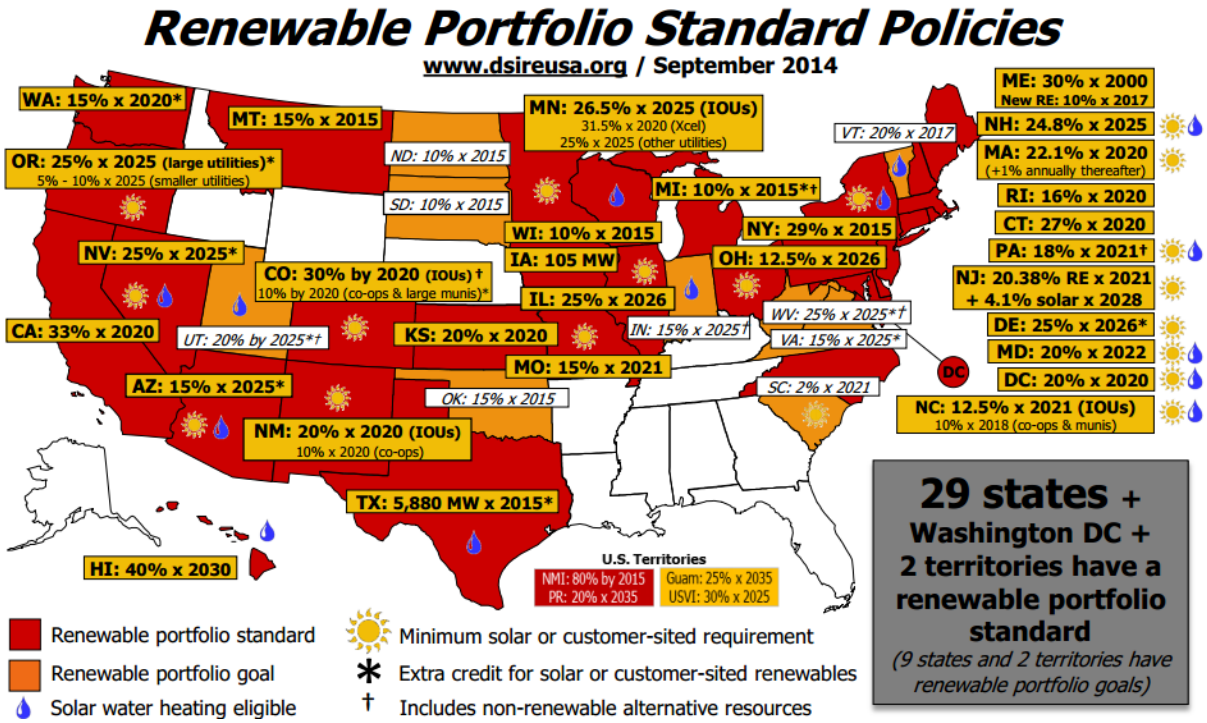


State	Rank Q1 2014	Rank Q2 2014
Massachusetts	7	2
New Jersey	2	4
North Carolina	4	5
New York	8	8
Maryland	12	13
Connecticut	19	18
Ohio	22	20
Delaware	23	21

So – How Does Net Metering Work?



RECs Driven by Renewable Portfolio Standards



Renewable Energy Credits

The costs of various green options range from insignificant to very expensive – understanding the costs is essential for informed decision making.

Cons: Confusing, Few Rules

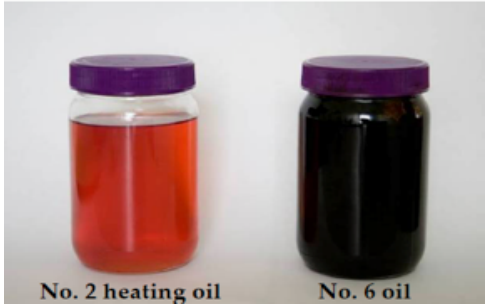
Pros: Flexibility, Choice, Economic Efficiency

Carbon Offset Options and Prices		
Renewable Energy Certificates	2015 offer	
Compliance Market	$/metric ton	
ME Class I	$	11.03
ME Class II	$	0.99
MA Class I	$	110.25
MA Class II	$	57.33
MA W-E	$	21.50
MA Solar	$	870.98
CT Class I	$	110.25
CT Class II	$	1.65
CT Class III	$	55.13
MD Tier I	$	33.08
MD Tier II	$	12.13
MD Solar	$	308.70
NJ Class I	$	40.79
NJ Class II	$	12.13
NJ Solar	$	402.41
Voluntary Market		
US Green-E Wind	$	2.65
Low Impact Hydro	$	2.21
Nuclear Power	$	-
Carbon Offsets		
Compliance Market		
New England Regional Greenhouse Gas (RGGI)		4.43
California		12.65
Europe EUA (Euros)		5.78
Voluntary Market		
Generic National Blend		3.15
*All RECs converted using (lbs/MWh)		1000
(mt/MWh)		0.454

Fuel Conversion/Arbitrage

- **Fuel Conversion**: Replacing inefficient fuels with clean, economical alternatives (i.e., going from coal or oil to natural gas). This reduces energy consumption and costs while lowering CO_2 emissions.

- **Fuel Arbitrage (Fuel Switching)**: The simultaneous purchase of one commodity against the sale of another in order to profit from fluctuations in the usual price relationship between the two.



Sustainability Options Summary

- What are your green initiatives?
  - Green Energy Purchases
    - PPA, Onsite, Supplier, RECs, RPS
  - Demand Response Programs
  - Energy Efficiency Evaluation
  - Fuel Conversion Analysis and Management
  - Wind Power
  - Solar PV and Thermal Solar
  - Green Generation Analysis

Brief Overview of Competitive Energy Services

Competitive Energy Services

Independent energy services firm

- Over 700 clients; $2 billion in energy spend
  - Industrial, institutional, governmental, commercial
- Proud New England business
  - Local resources to provide responsive services
  - Clients across the US and Canada
- 100% Supplier-neutral, product neutral
- Transparent fees
- Customized Solutions
  - Clients choose from Procurement, Full Service or Consulting options

Energy Services

- Energy Procurement:
  - Electricity, Natural Gas, Heating Oil, Residual Oil, Propane, RECs, Carbon Offsets
  - Strategy design & implementation
  - Market monitoring & forecasting
  - Robust competitive bid process
  - Contract negotiation
- Supplier neutral, product neutral
- Transparent Fees
- Utility bill analysis and audit
- Fuel Conversion & Arbitrage
- Renewable energy management
- Onsite generation assessment
- Grant assistance
- Project management
- Value at risk analysis
- Regulatory policy expertise

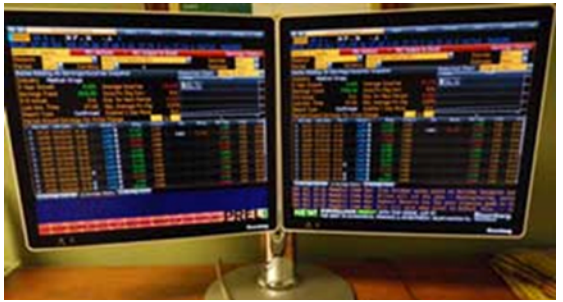
No Typical Strategy

CES understands each client's:

- Operations
  - Holistic energy portfolio understanding
  - Integral component of Client's team
- Risk Tolerance
  - Locked vs. open positions across all energy products
  - Daily price vs. futures market
  - How much product and/or dollars at risk?
- Budgetary concerns
  - Timing of budgets, outlook term, management priorities

Market Monitoring

- **Focused on markets, economics, analysis, details, granularity**
  - Nine person analytical team and ten Account Managers
  - Real-time market information
  - ICE, Bloomberg, Platt's Gas Daily, RTO's/ISO's, Pipelines
    - Electricity, Natural Gas and Liquid Fuels **priced daily**
    - CNG and Biomass are monitored as needed
  - Constant field access and knowledge
    - By minute, hour, daily reads and views
    - Produce ***CES Market Summary***, a weekly analysis of the energy markets
    - Write weekly blogs on current and pertinent topics for clients
  - Custom database
    - Specific to CES and its customers



Selected Clients

- Freeport Sewer District
- Brunswick Sewer District
- The Maine Water Company
- Manchester Waterworks
- The Connecticut Water Company
- City of Montpelier, VT
- City of Manchester, NH
- City of Portland, ME
- State of Maine
- Town of Dracut, MA
- Woods Hole Oceanographic Institute
- Huhtamaki/Chinet Co.
- New Balance Athletic Shoe
- Hannaford Bros. Supermarkets
- University of Maine System
- University of Massachusetts System
- Amherst College
- Dartmouth College
- Williams College
- LL Bean
- Ethan Allen
- Adobe
- Texas Instruments

CES Client Testimonial
New Balance Athletic Shoe, Inc.

- *For the past 5 years I have depended on Competitive Energy Services to guide New Balance Athletic Shoe through a very turbulent energy market. CES's expert position in the field of energy portfolio management, data and trend analysis, market insight, and capital equipment assessment has been invaluable to me. The return on our partnership investment has been nothing short of phenomenal. The CES Team has become an extension of my team and has become our "Portland Energy Office". I have nothing but full confidence in the CES team to deliver the best portfolio strategy that can be executed.*

John Campbell
Director of Corporate Services
New Balance Athletic Shoe, Inc.

Competitive Energy Services

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