



The Market Survey of the Energy Industry 2003

Compiled and Edited by

*Albert Thumann, CEM, Executive Director
Ruth Marie, Director Information Services*

INTRODUCTION

The Association of Energy Engineers has surveyed its members on current trends impacting the energy marketplace. The 436 participants' responses in this comprehensive survey provide important information on formulating a National Energy Policy and the accomplishments of energy management.

In addition, the salary survey section details provide income and bonus information for energy professionals. The impact of deregulation and energy procurement is also outlined.

➤ **ENERGY POLICY – PART I**

Energy Policy provides an overview of actual criteria that should be included in formulating a national energy policy.

➤ **MARKET TRENDS – PART II**

Market Trends provides details of market trends and includes accumulated savings as a result of incorporating energy management technologies.

➤ **INCOME & SALARY SURVEY – PART III**

The Income & Salary Survey offers a comprehensive salary survey.

➤ **ELECTRIC & GAS PURCHASING & ENERGY SERVICES - PART IV**

This is a comprehensive survey of electric and gas and energy services programs.

Any comments or questions may be directed to info@aeecenter.org. Thank you!

Part 1 – Energy Policy

1. Which of the following is most important in a National Energy Policy?

	Count	Percentage
Electric generation	17	3.89%
Energy efficiency and management	175	40.05%
Energy supply	131	29.98%
Energy transmission and distribution (gas, oil & electric)	51	11.67%
Environmental issues	21	4.81%
Research & development	40	9.15%
Transportation	2	0.46%
	437	

2. Do you believe AEE staff and budget should be used to influence national energy policy?

	Count	Percentage
Yes	371	85.68%
No	62	14.32%
	433	

3. Do you believe current federal energy programs support the President's National Energy Policy?

	Count	Percentage
Yes	135	35.06%
No	250	64.94%
	385	

4. Have you reviewed the President's National Energy Policy?

	Count	Percentage
Yes	243	57.04%
No	183	42.96%
	426	

5. Do you believe the AEE should publish an AEE National Energy Policy Guidance report for use in conveying the opinions of its membership to the Federal government for the purpose of influencing national energy policy?

	Count	Percentage
Yes	397	91.90%
No	35	8.10%
	432	

6. Distributed energy and cogeneration (combined heat and power) must be encouraged in national energy policy?

	Count	Percentage
Yes	368	86.79%
No	56	13.21%
	424	

Part 1 – Energy Policy

7. What is your opinion regarding commercial building energy-efficiency codes?

	Count	Percentage
Codes are fine as is	81	18.54%
Building and equipment efficiency codes are too strict now	14	3.20%
Building and equipment codes should become more efficient	342	78.26%
	437	

8. Do you believe the President's National Energy Policy adequately address energy management?

	Count	Percentage
Yes	38	8.72%
No	249	57.11%
Don't Know	149	34.17%
	436	

9. Do you believe the current National Energy Policy is helpful or a hindrance to your efforts in reducing your current and future energy costs?

	Count	Percentage
Hindrance	179	49.72%
Helpful	181	50.28%
	360	

10. The National Energy Policy should identify new energy supplies from a multitude of sources and promote energy efficiency.

	Count	Percentage
Agree	410	95.57%
Disagree	19	4.43%
	429	

11. To encourage new power generation, environmental regulations should be made less stringent.

	Count	Percentage
Agree	105	24.48%
Disagree	324	75.52%
	429	

12. Oil production in environmentally sensitive areas will be necessary to meet future energy needs.

	Count	Percentage
Agree	203	47.10%
Disagree	228	52.90%
	431	

Part 1 – Energy Policy

13. The National Energy Policy should encourage investment in new power generation and new transmission lines.

	Count	Percentage
Agree	348	81.69%
Disagree	78	18.31%
	426	

14. Global warming concerns need to be addressed in the National Energy Policy.

	Count	Percentage
Agree	326	75.46%
Disagree	106	24.54%
	432	

15. Investment tax credits and accelerated depreciation should be implemented to encourage adoption of efficient end-use technologies.

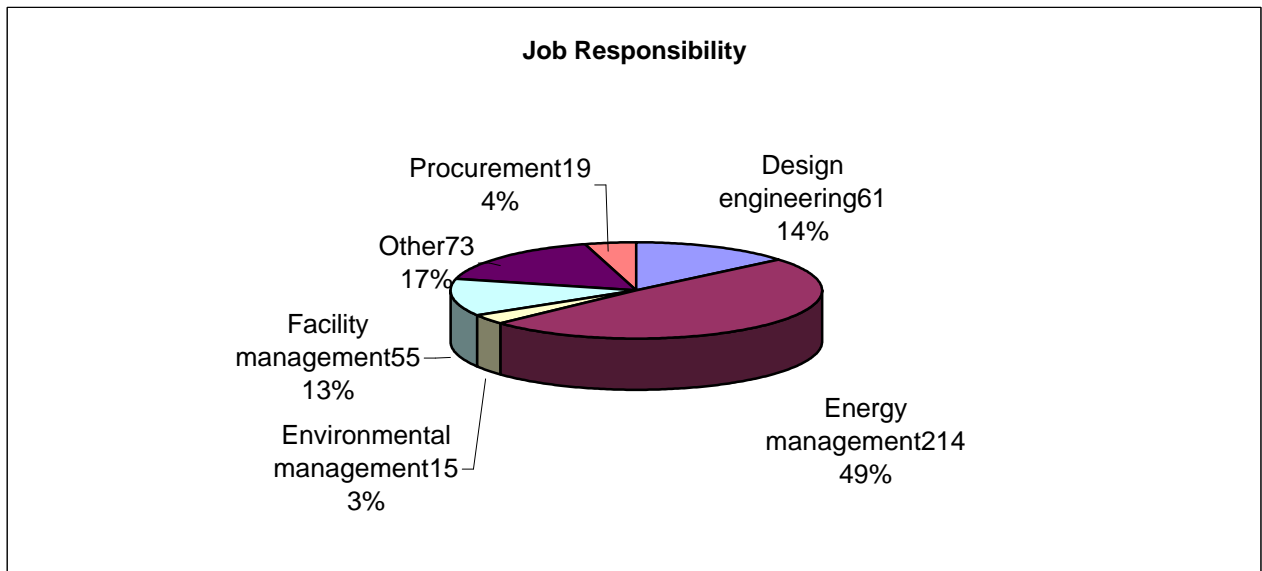
	Count	Percentage
Agree	405	93.32%
Disagree	29	6.68%
	434	

Part II – Market Trends

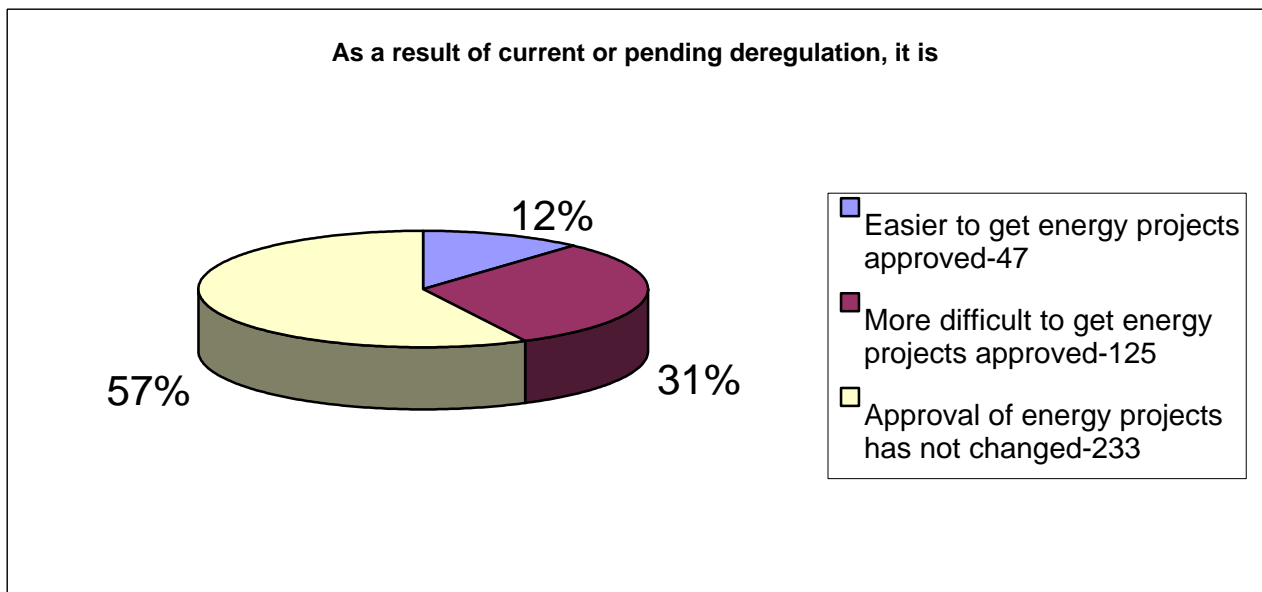
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Field of Employment	Count	Percentage
Consultant	112	25.63%
Contractor/builder	22	5.03%
Education	8	1.83%
Energy User (Building, plant, facilities, industrial)	104	23.80%
Equipment supplier	16	3.66%
ESCO	54	12.36%
Government (local, state or federal)	38	8.70%
Other	11	2.52%
Research and Development	4	0.92%
Utility or energy supplier	68	15.56%

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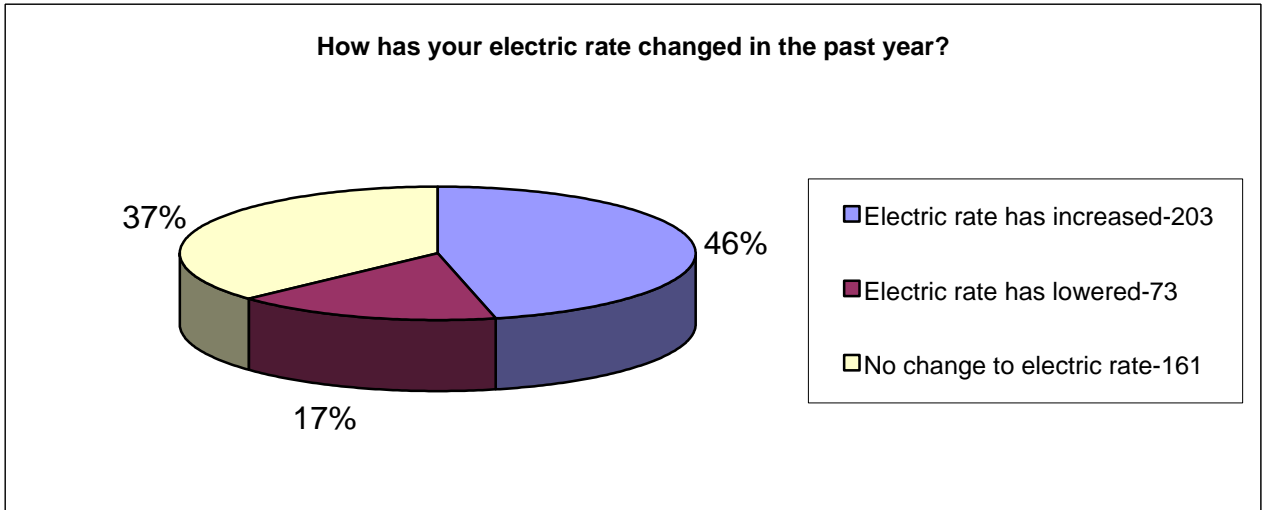


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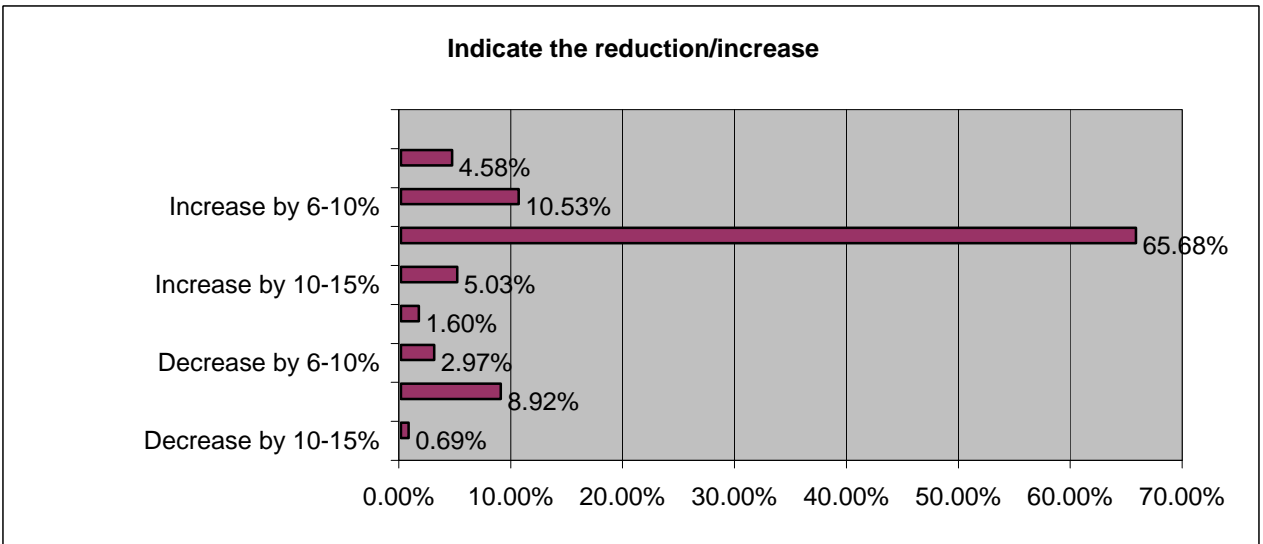


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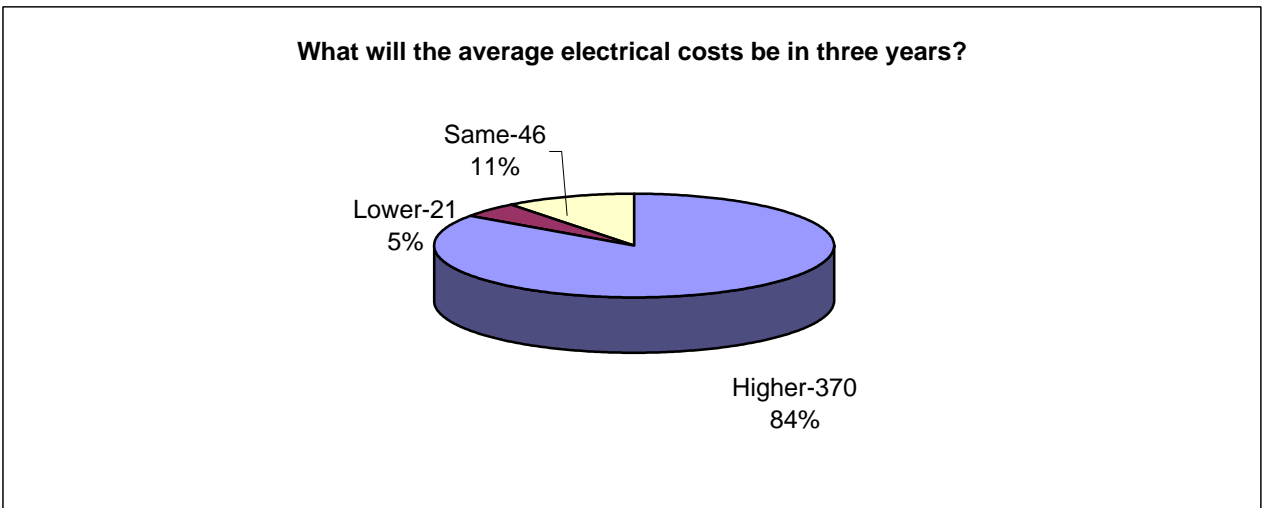
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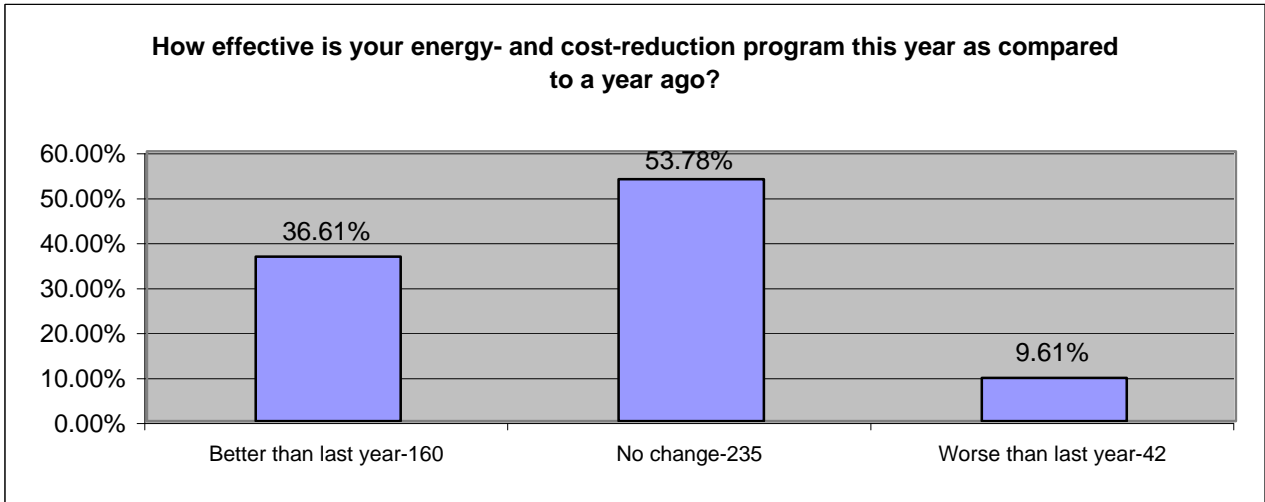


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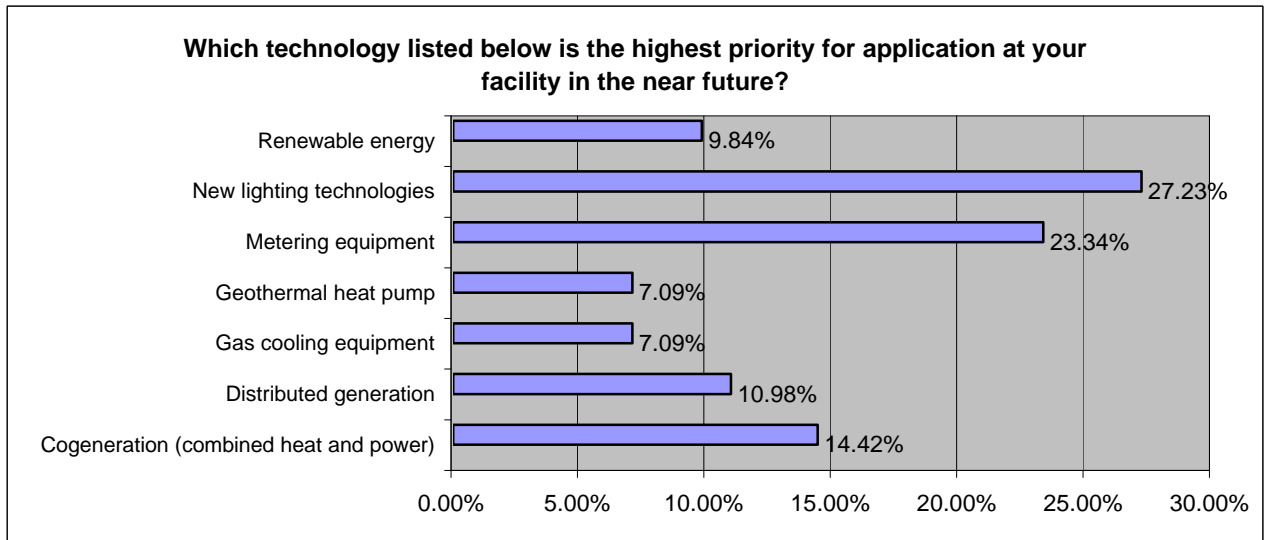


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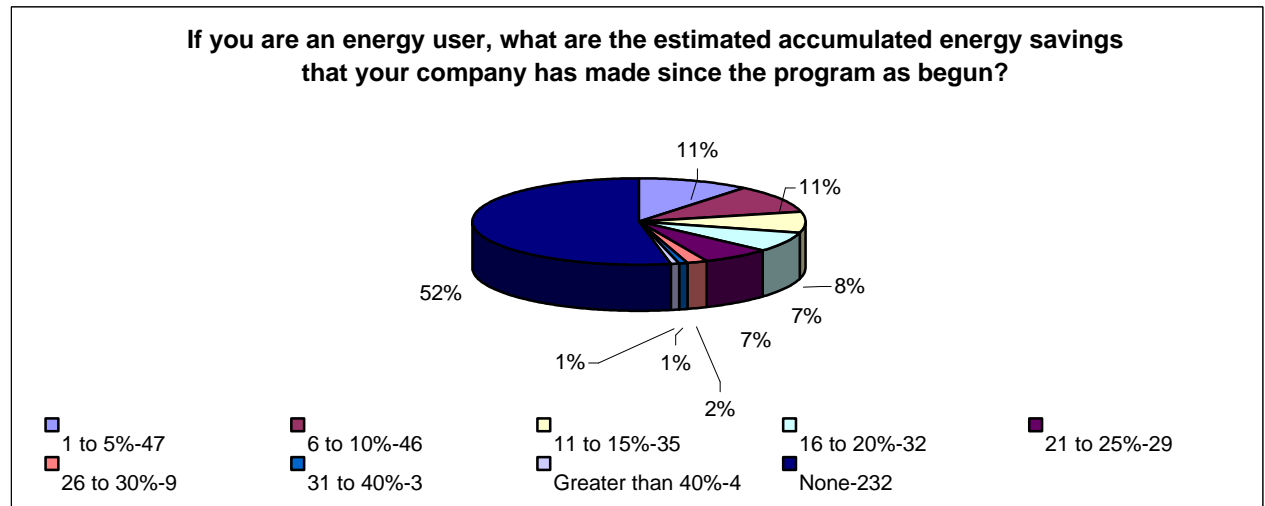
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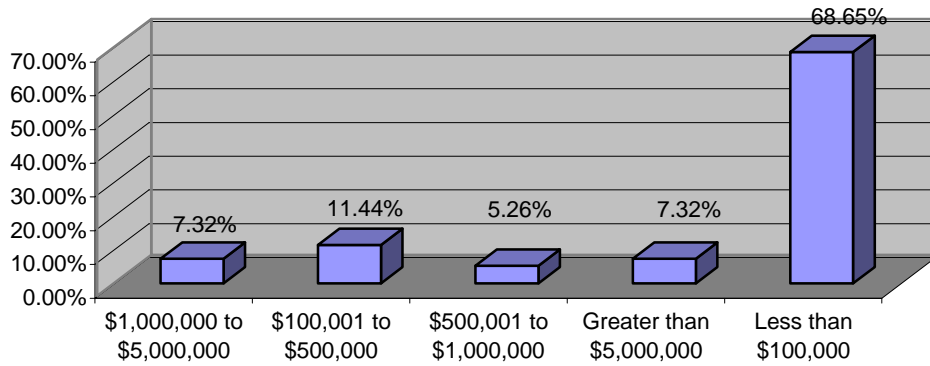
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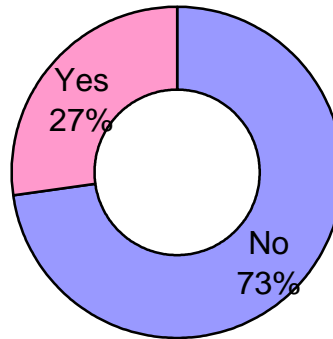
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If you are an energy user, what is the estimated total accumulated energy cost reductions since the energy reduction program was started?



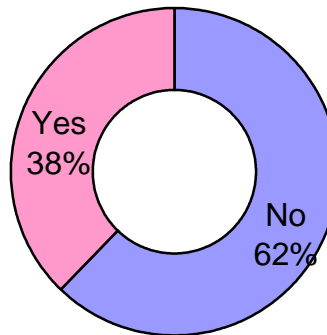
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If you are an end user, has your company used an energy service company to finance energy projects?



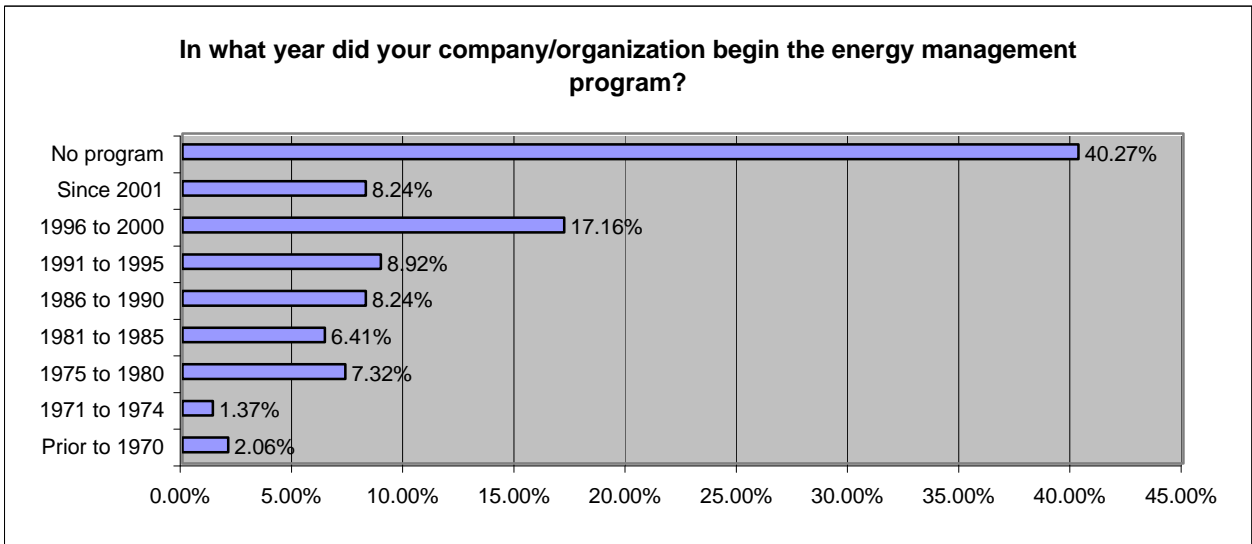
12.

If you are an end user, do you plan to use an energy service company to finance energy projects in the future?

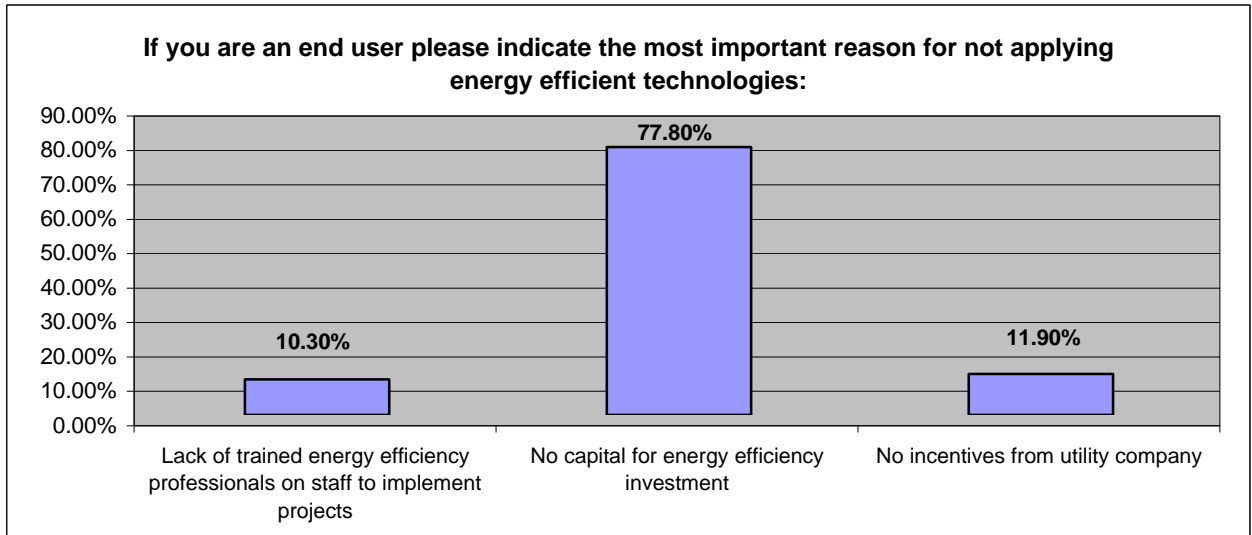


Part II – Market Trends

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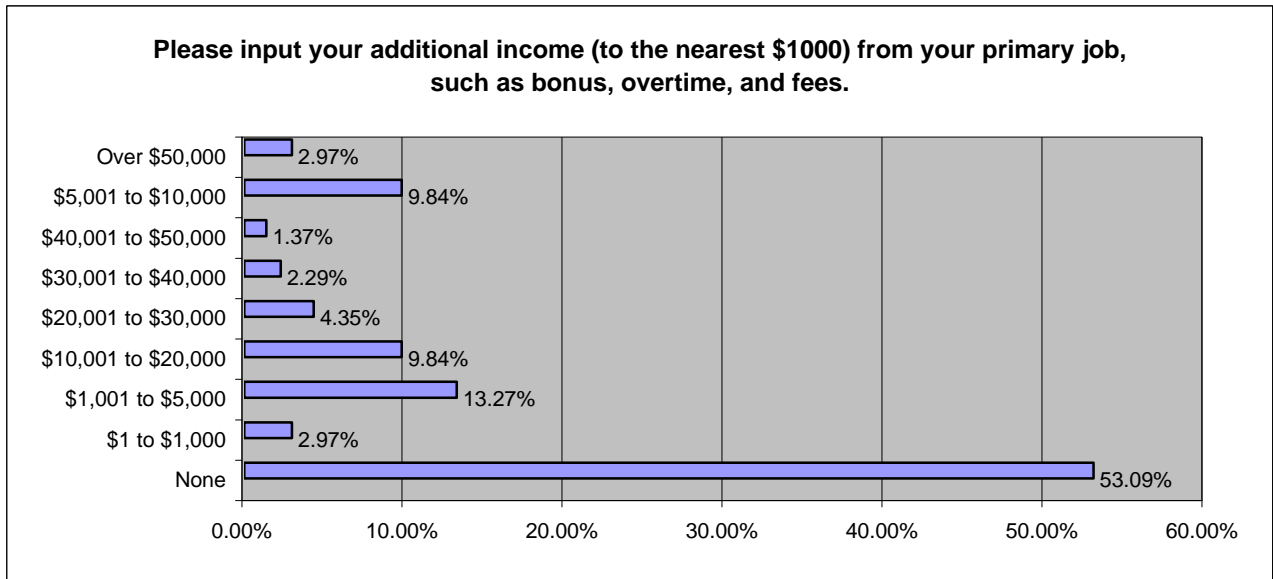


Part III – AEE Income and Salary Survey

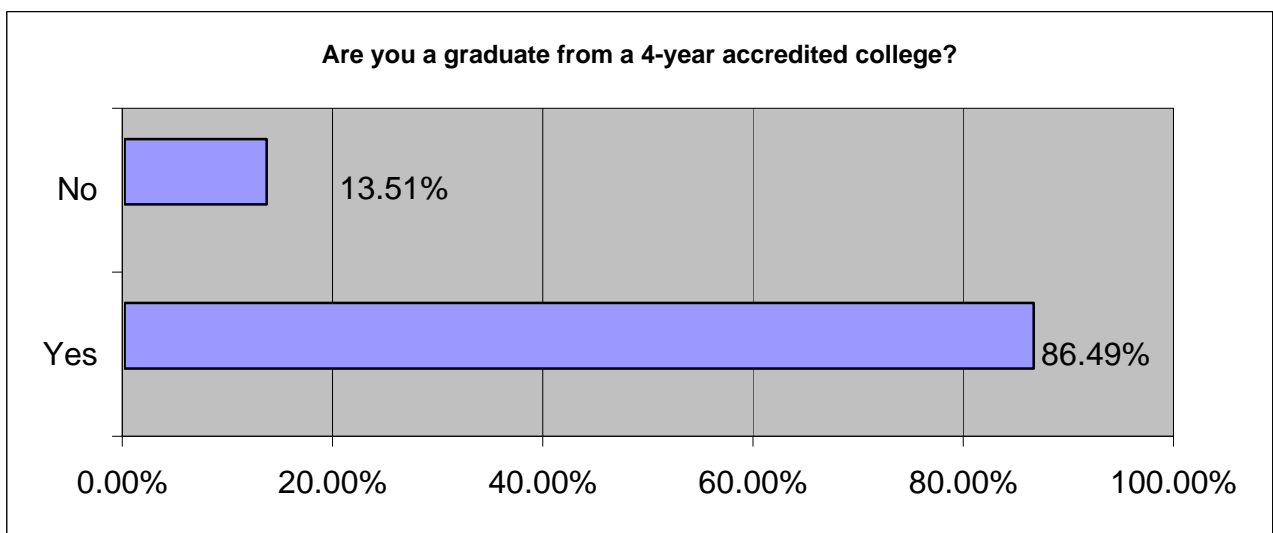
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Base Salary	Count	Percentage
\$10,000 to \$20,000	37	8.47%
\$100,000 to \$110,000	20	4.58%
\$110,000 to \$120,000	10	2.29%
\$120,000 to \$130,000	5	1.14%
\$130,000 to \$140,000	3	0.69%
\$140,000 to \$150,000	1	0.23%
\$20,000 to \$30,000	4	0.92%
\$30,000 to \$40,000	29	6.64%
\$50,000 to \$60,000	70	16.02%
\$60,000 to \$70,000	84	19.22%
\$70,000 to \$80,000	103	23.57%
\$90,000 to \$100,000	60	13.73%
Over \$150,000	11	2.52%

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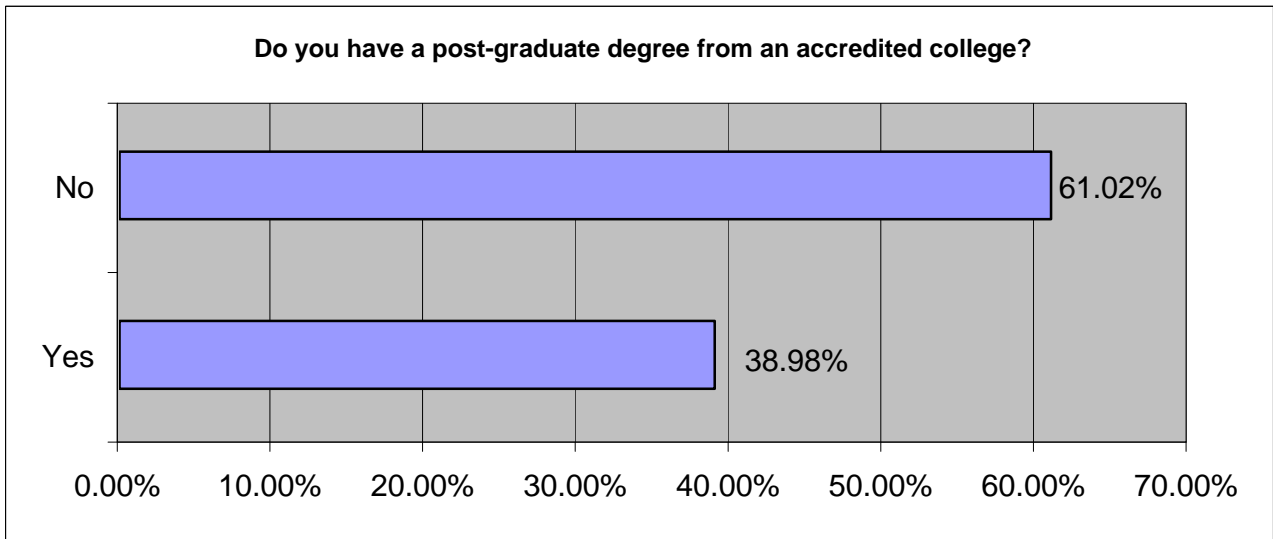


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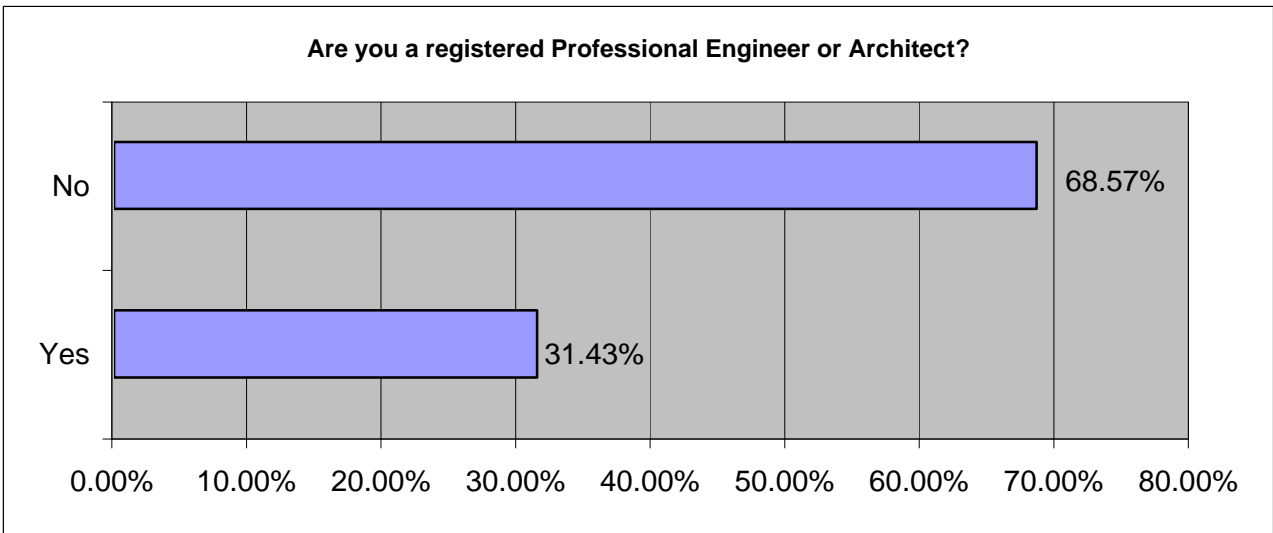


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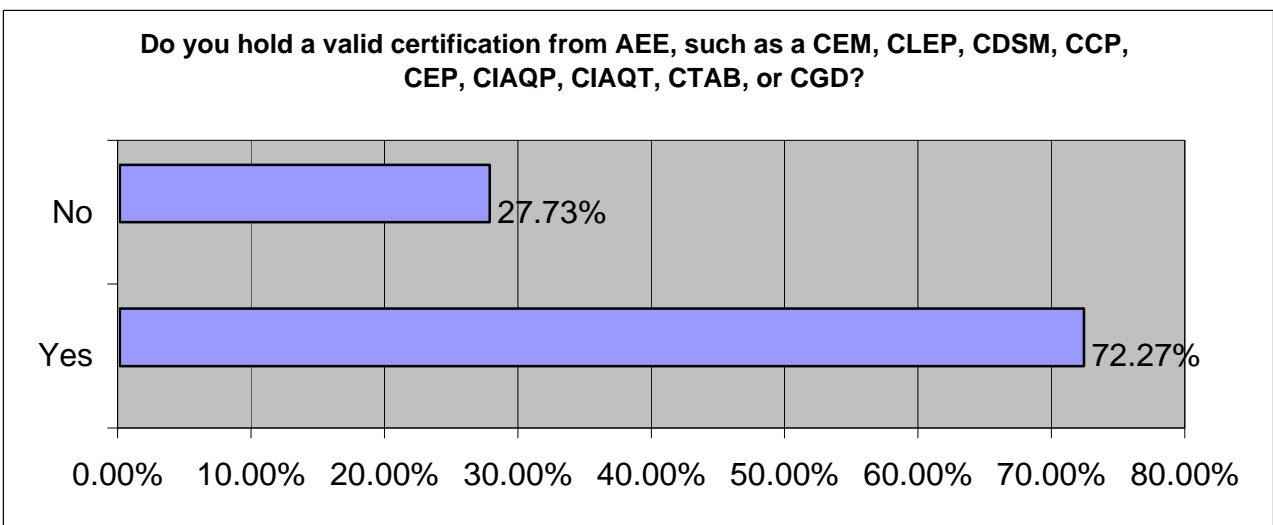
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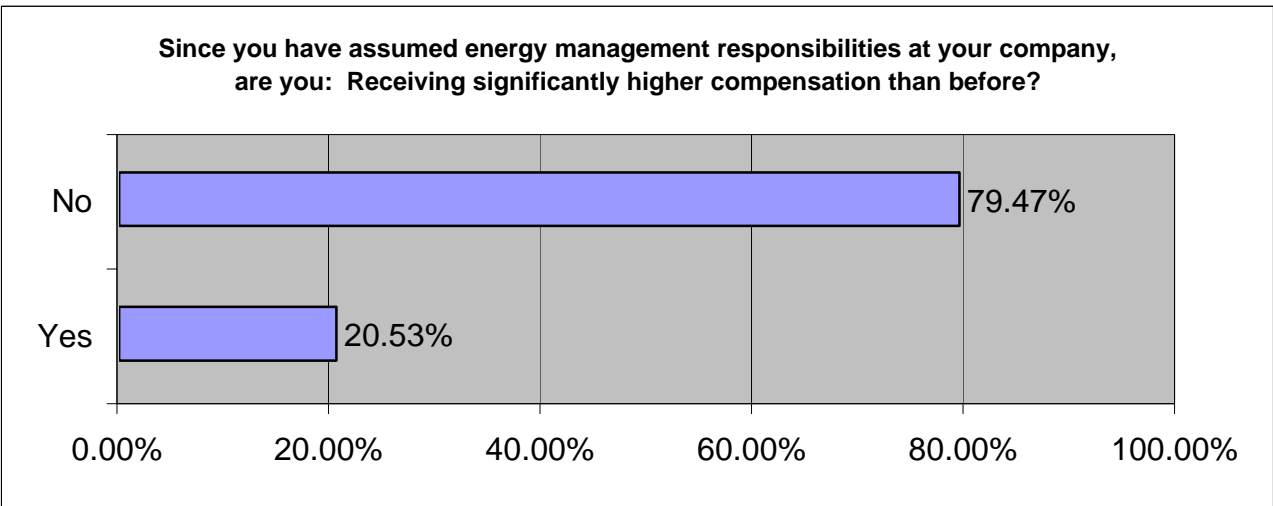


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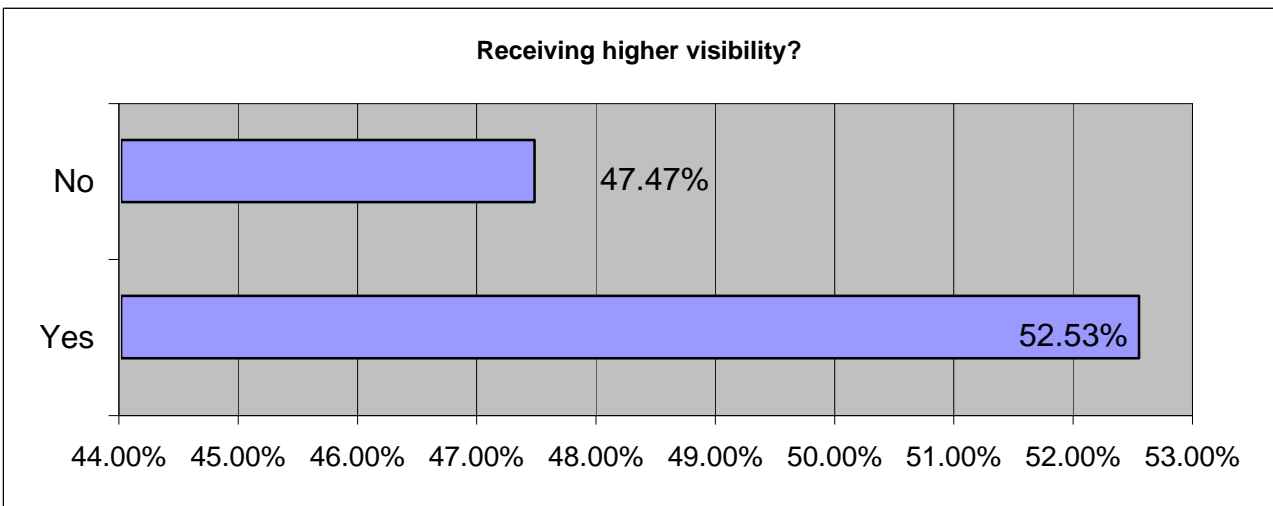


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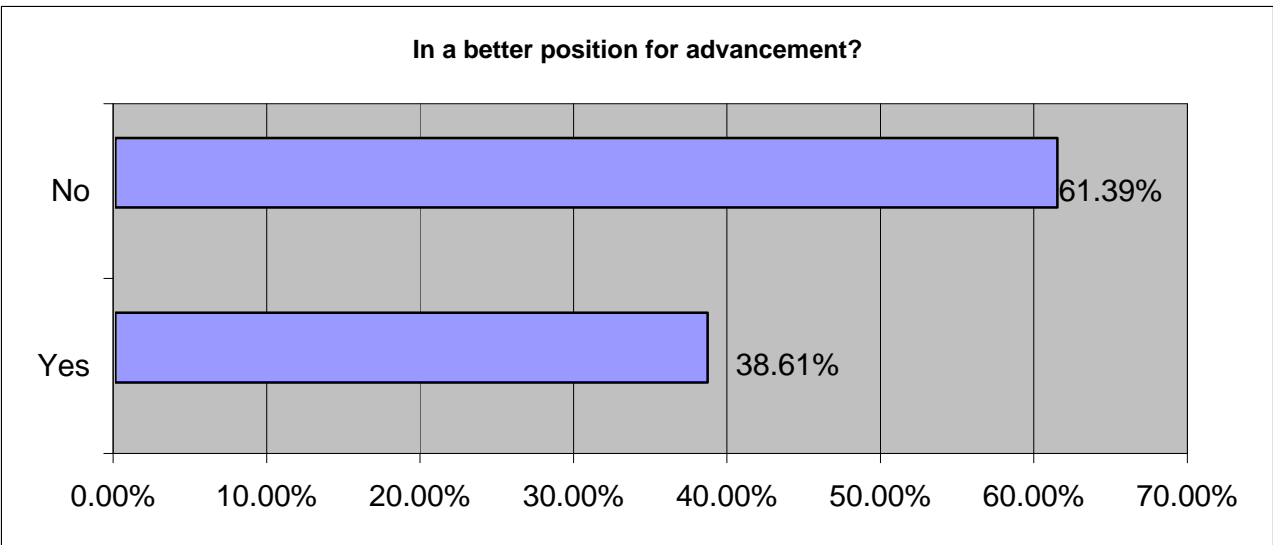
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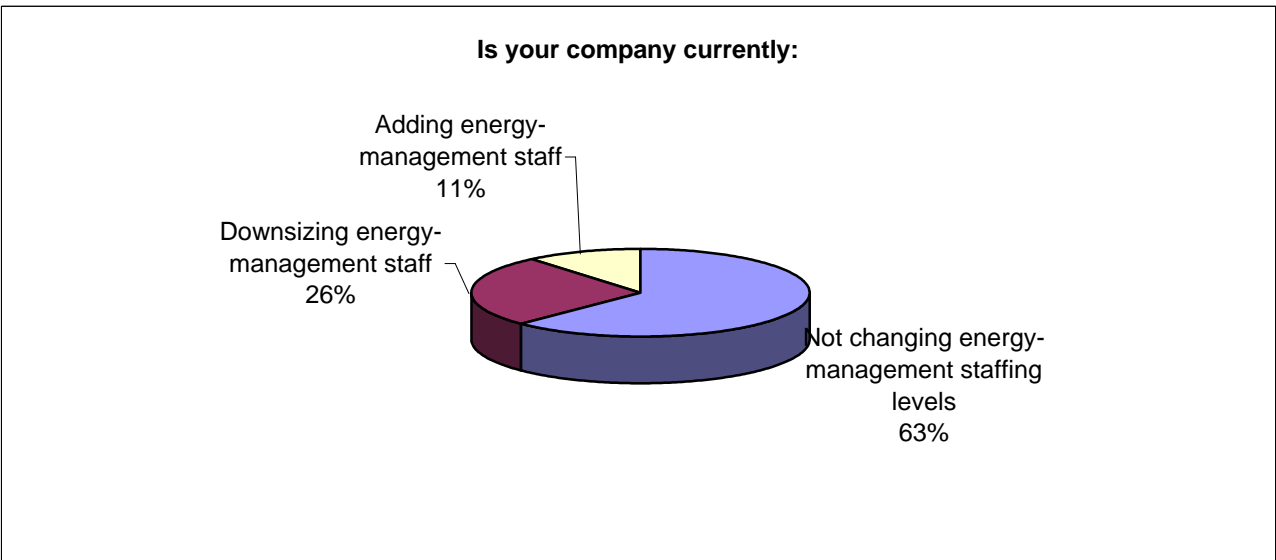


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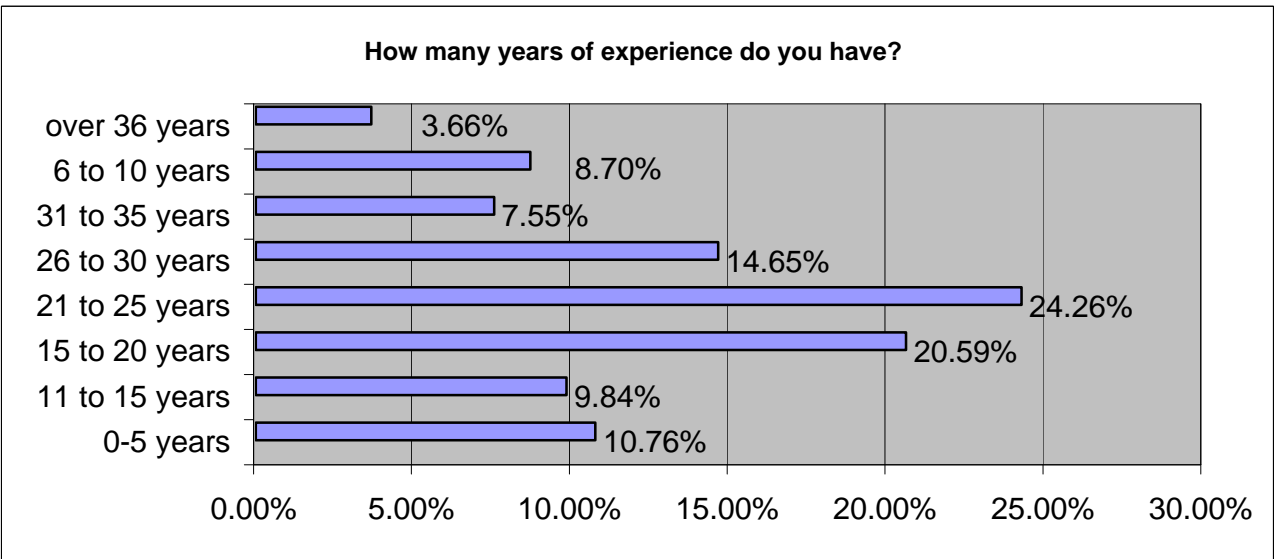


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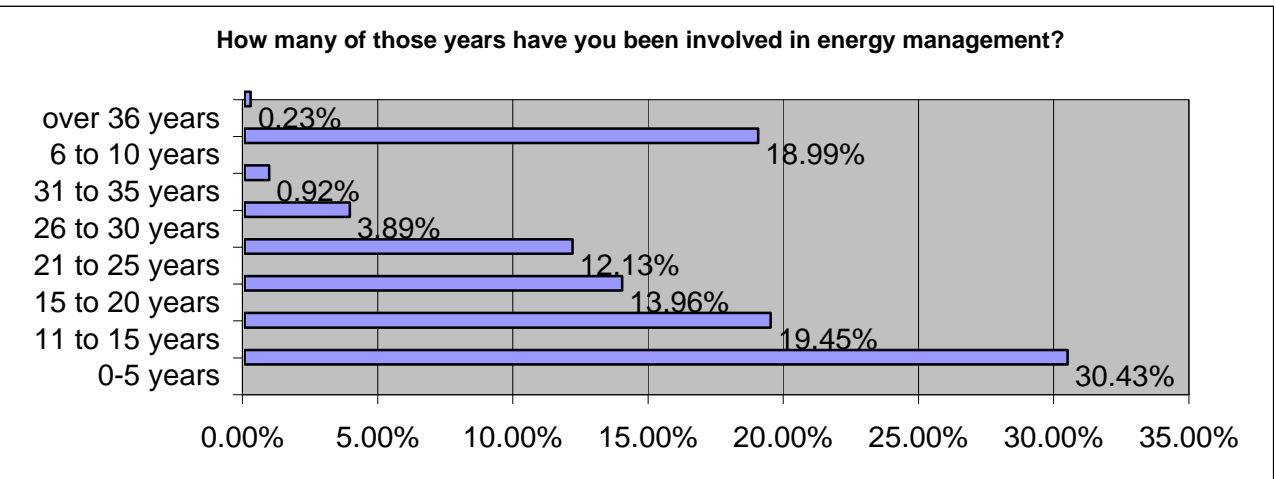
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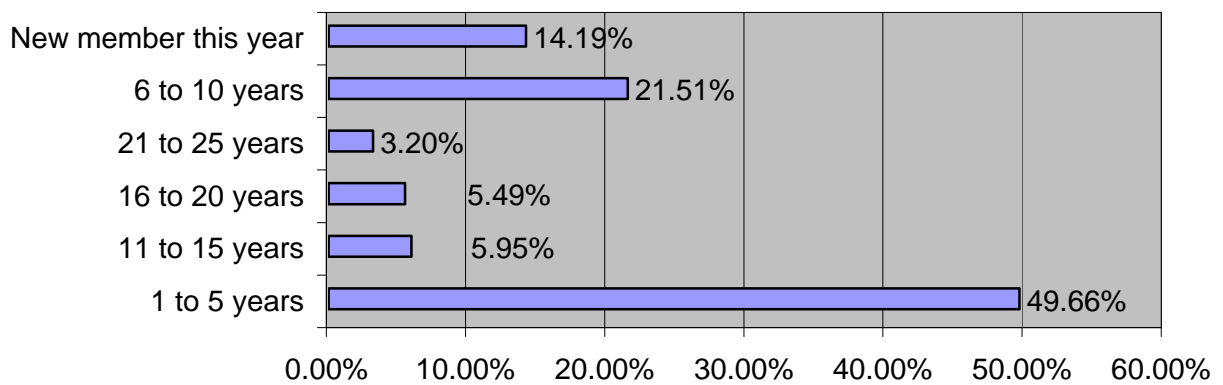
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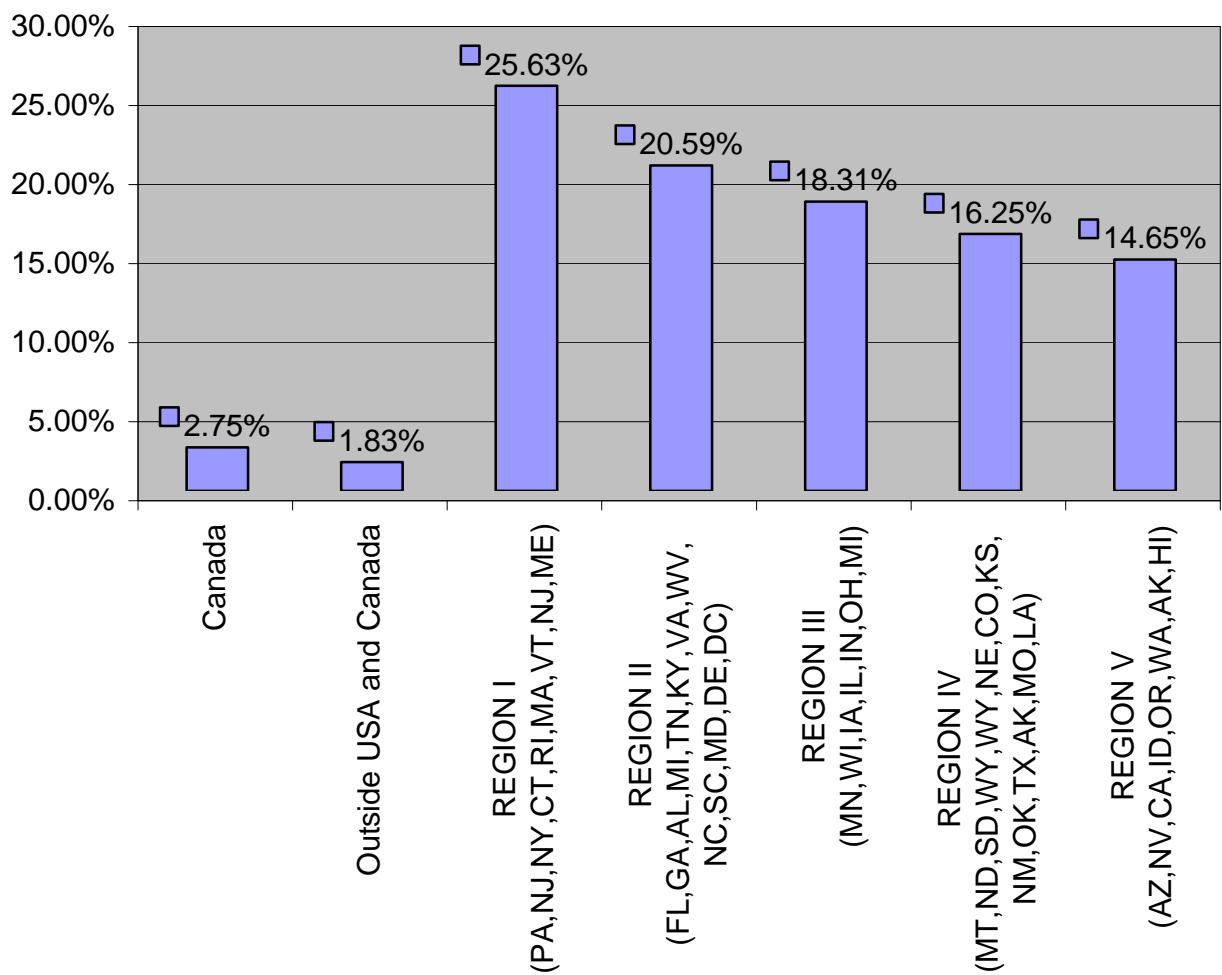
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How many years have you been a member of the Association of Energy Engineers?



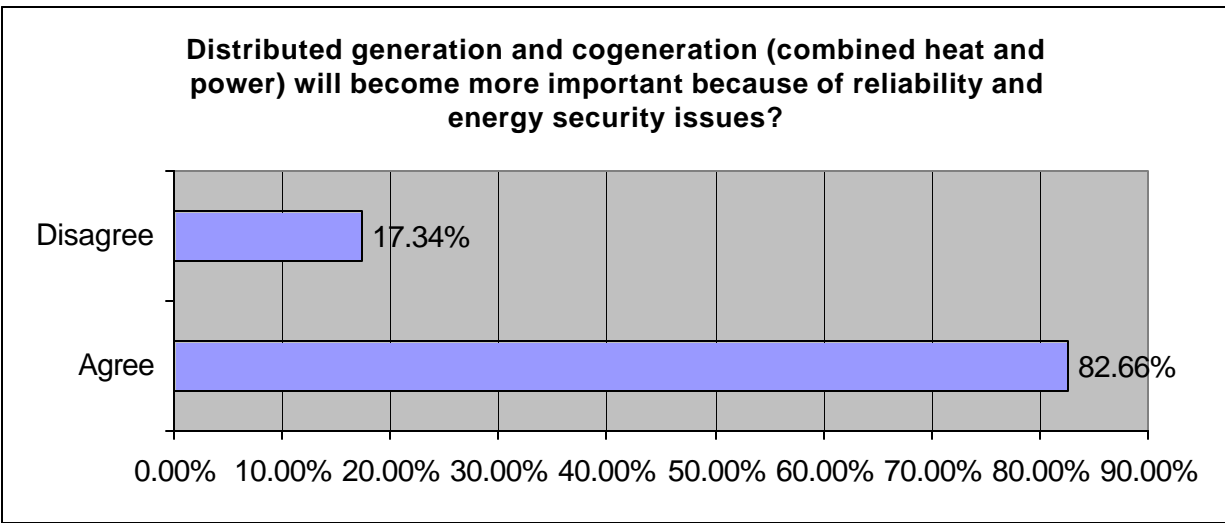
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Please identify the location where you are employed?

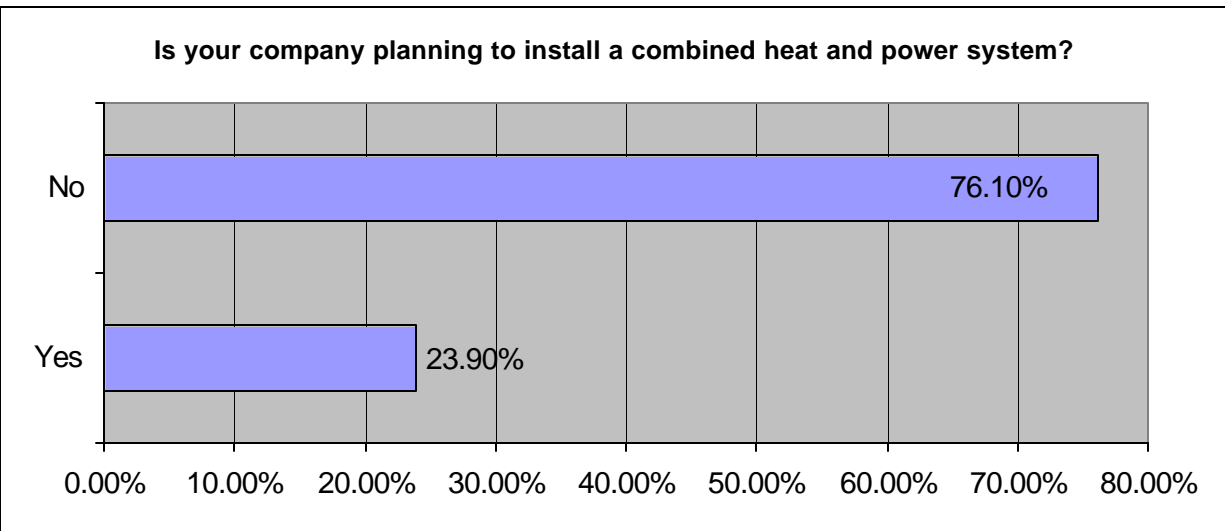


Part IV – Electric and Gas Purchasing and Energy Services

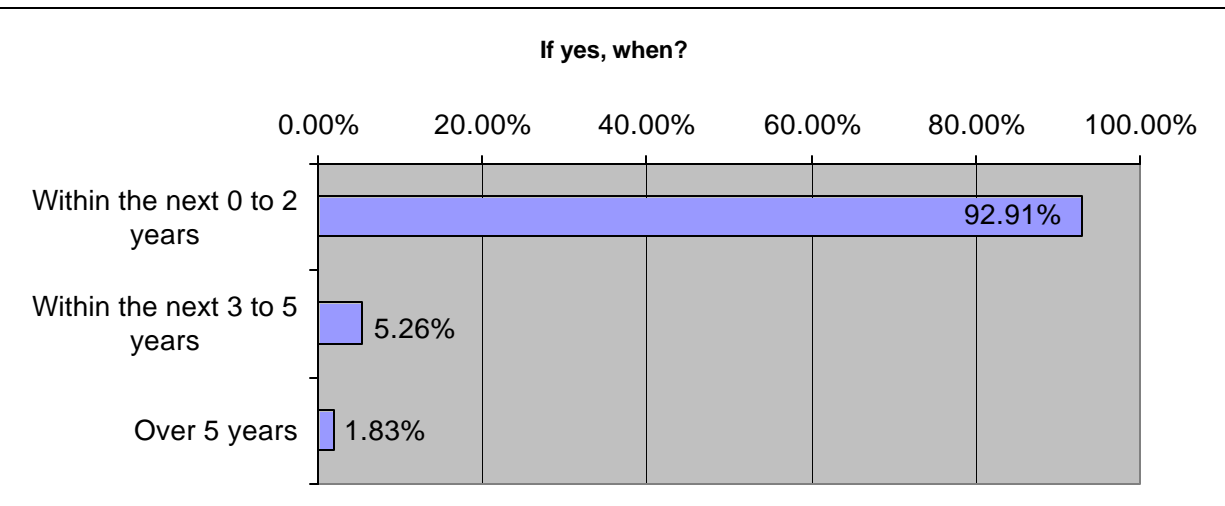
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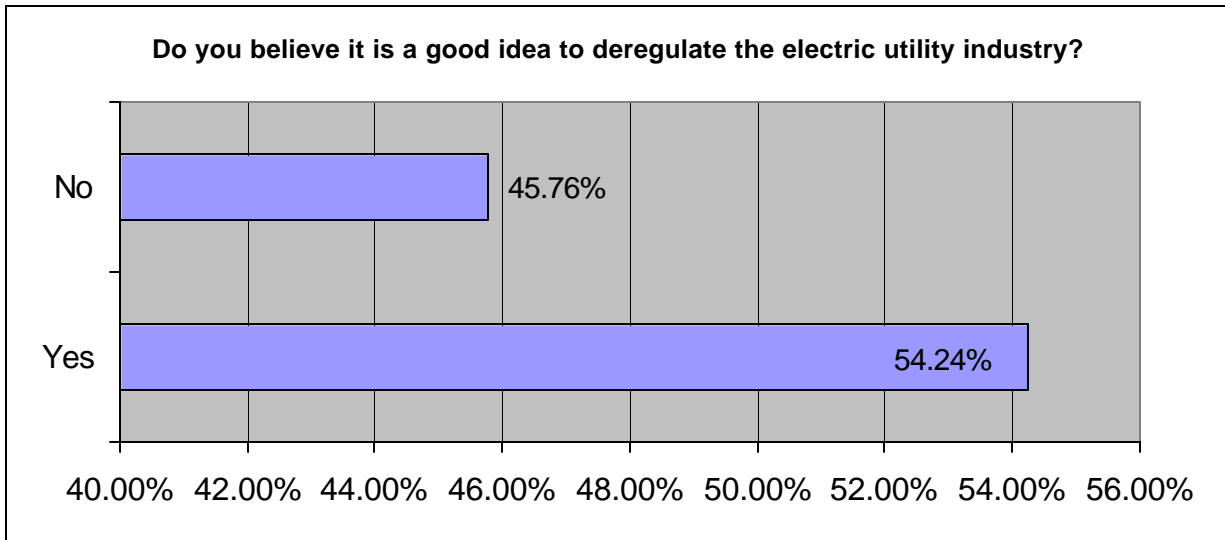


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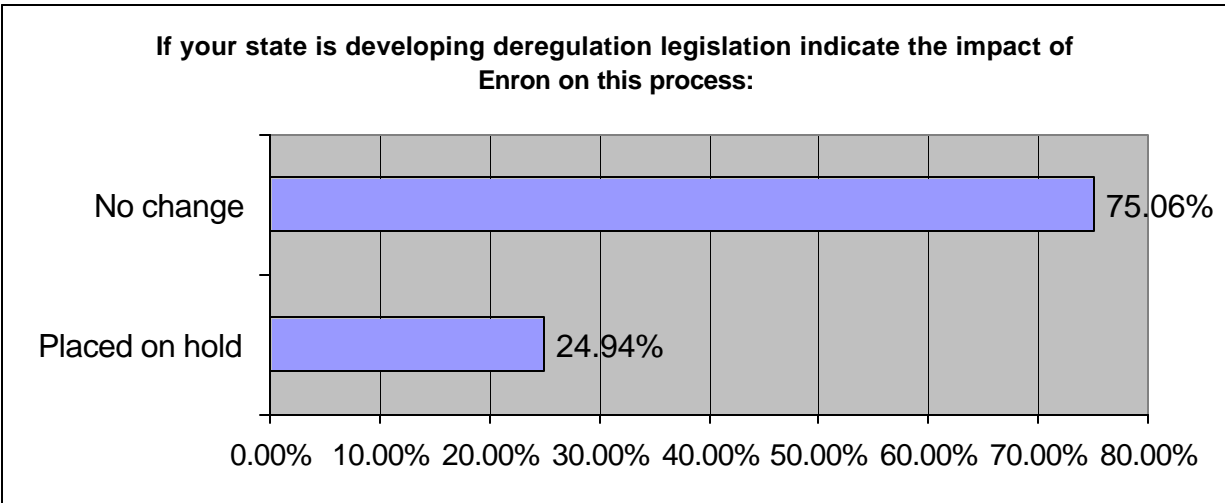


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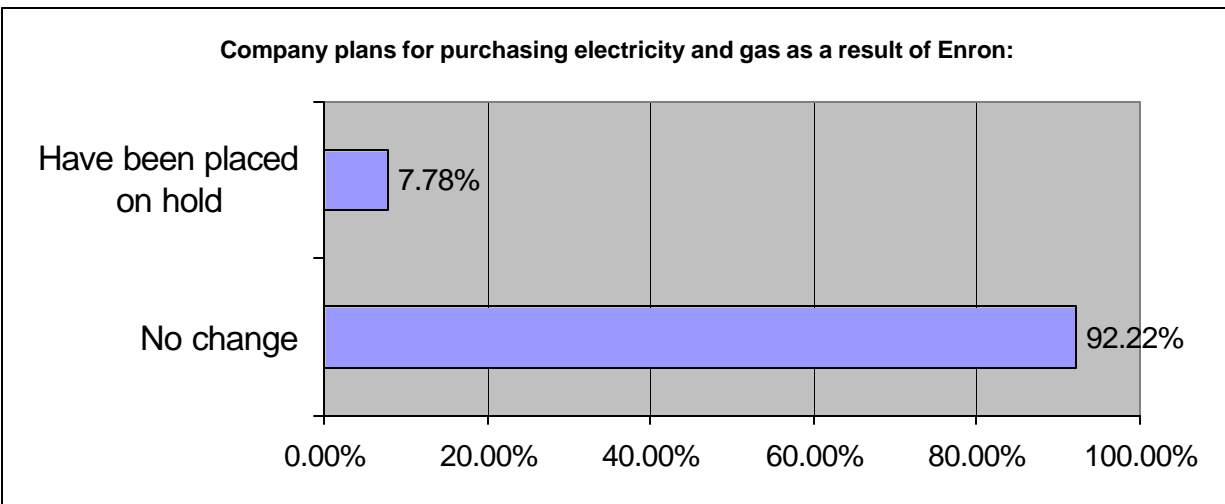
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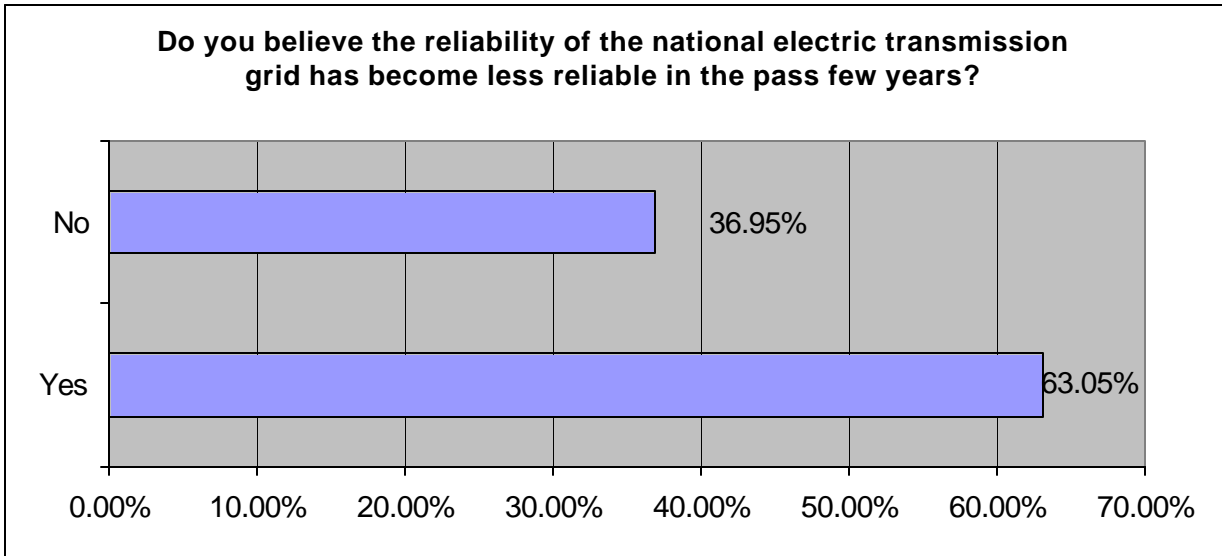


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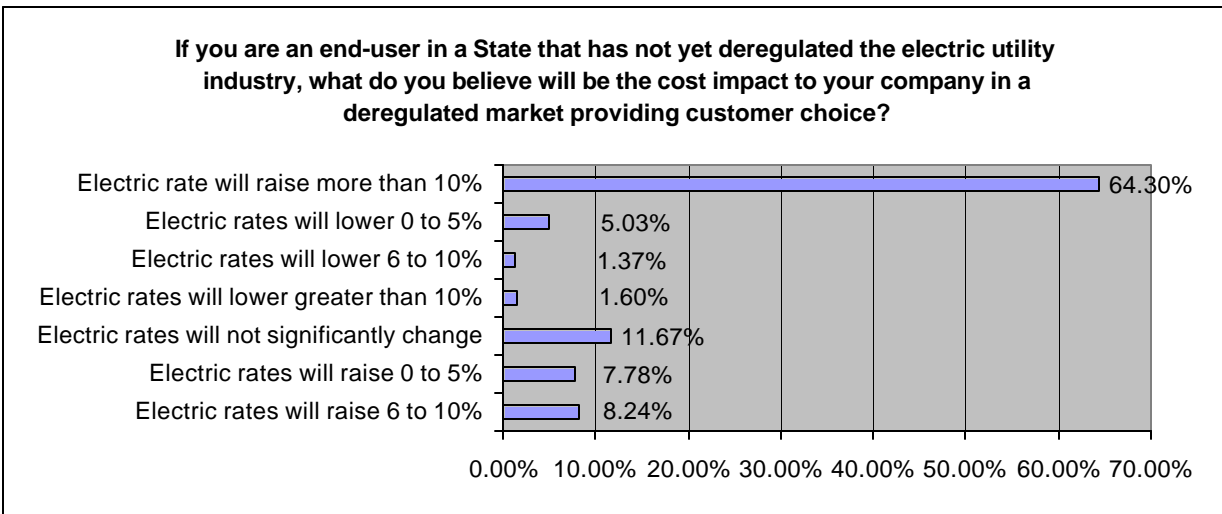


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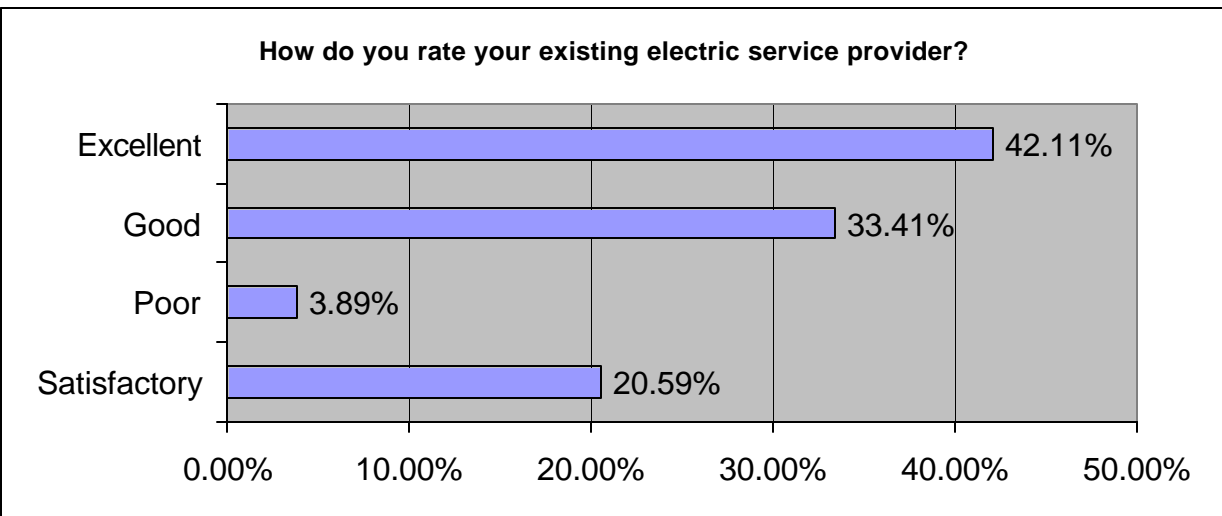
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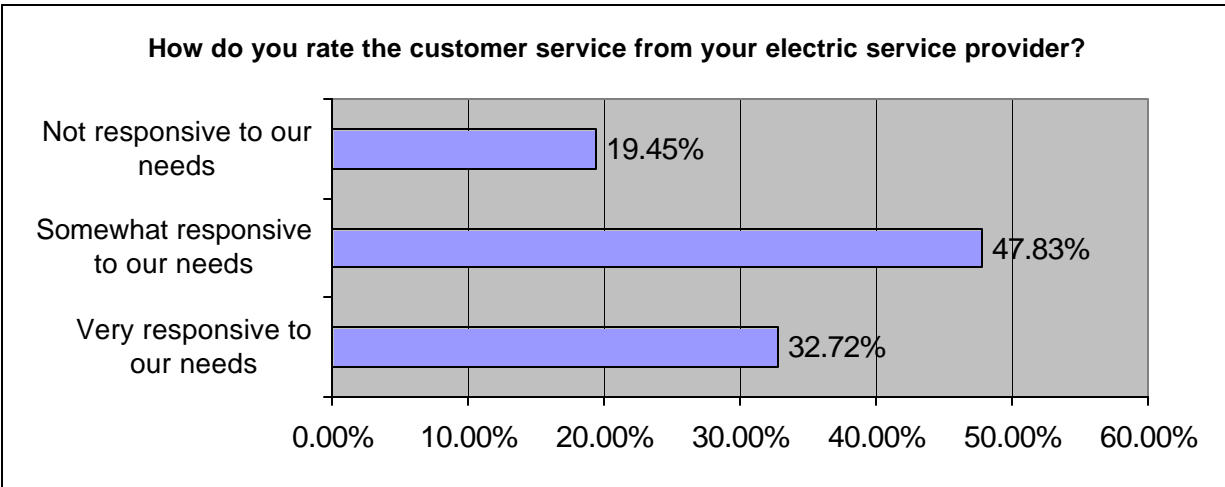


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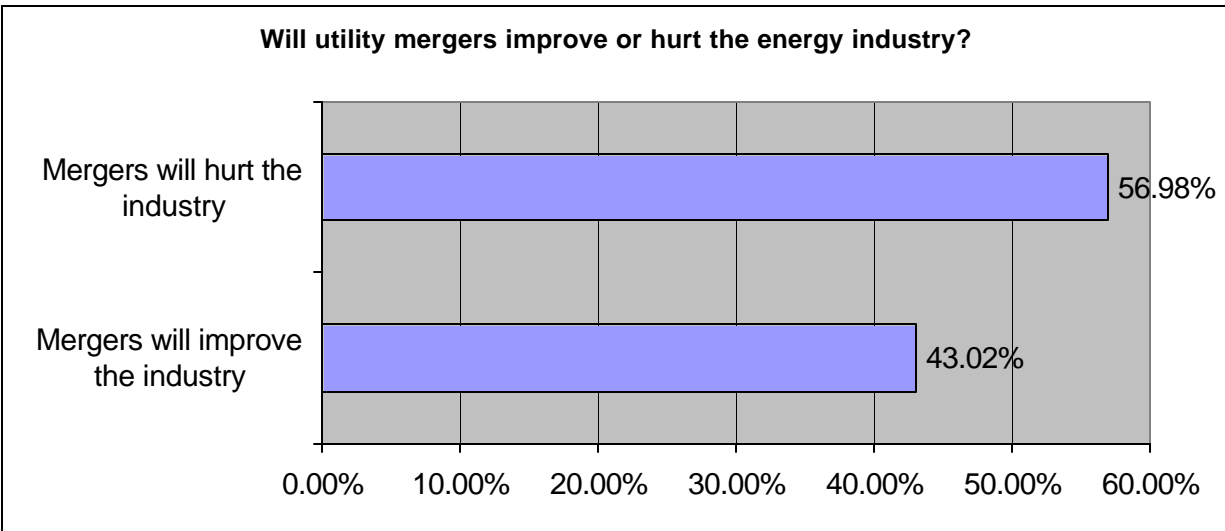


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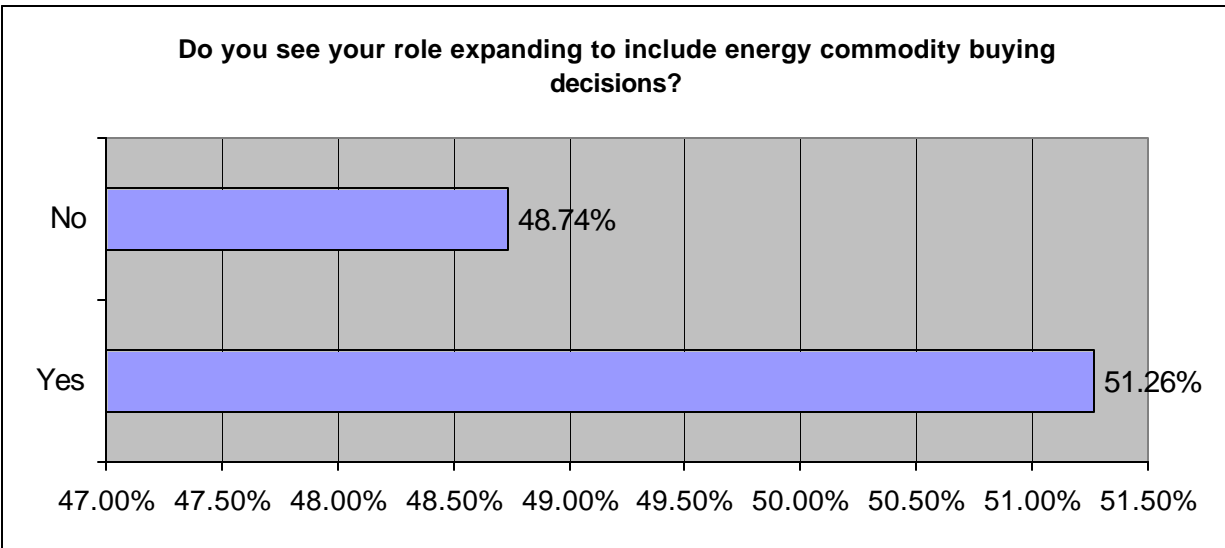
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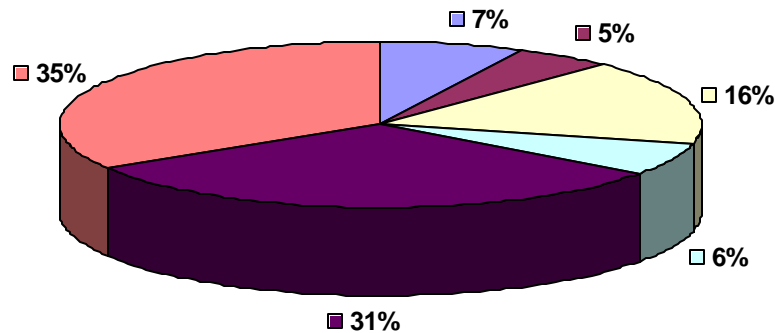
Part IV – Electric and Gas Purchasing and Energy Services

13.

	Count	Count
Contract cost mark-ups are too high	39	8.92%
Financial terms in the contract	29	6.64%
Lack of understanding of how the contracts work	87	19.91%
Measurement and verification of savings	215	49.20%
Other contract terms	31	7.09%
Unclear operations and maintenance responsibilities	36	8.24%

14.

What is the best way for utilities to encourage energy management activities by their customers?



■ Demonstrations of new energy-efficient technologies
 ■ Design support services
■ Education and training
 ■ Low interest financing
■ Rate design
 ■ Rebates

15.

If you are an end user and plan on procuring and negotiating contracts for competitive natural gas and electricity, would you use in-house staff or out-source staff?

