



The Market Survey of the Energy Industry 2004

Compiled and Edited by

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INTRODUCTION

The Association of Energy Engineers has surveyed its members on current trends impacting the energy marketplace. The responses of the 456 participants 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 Ruth Marie, 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	35	7.67%
Energy efficiency and management	242	53.07%
Energy transmission and distribution (gas, oil & electric)	106	23.25%
Environmental issues	20	4.39%
Research & development	46	10.09%
Transportation	7	1.53%
Total	456	

2 Distributed energy and cogeneration (combined heat and power) must be encouraged in the National Energy Policy?

	Count	Percentage
Yes	427	93.64%
No	29	6.36%
Total	456	

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

	Count	Percentage
Codes are fine as is	103	22.59%
Building and equipment codes should become more efficient	332	72.81%
Building and equipment codes are too strict now	21	4.60%
Total	456	

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

	Count	Percentage
Disagree	14	3.07%
Agree	442	96.93%
Total	456	

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

	Count	Percentage
Disagree	287	62.94%
Agree	169	37.06%
Total	456	

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

	Count	Percentage
Disagree	199	43.64%
Agree	257	56.36%
Total	456	

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

	Count	Percentage
Disagree	46	10.09%
Agree	410	89.91%
Total	456	

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

	Count	Percentage
Disagree	98	21.49%
Agree	358	78.51%
Total	456	

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

	Count	Percentage
Disagree	18	3.95%
Agree	438	96.05%
Total	456	

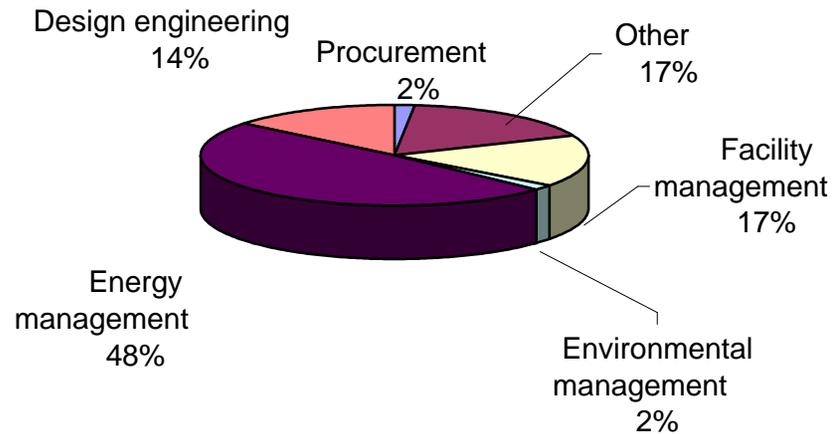
Part II – Market Trends

10. Please identify your primary field of employment.

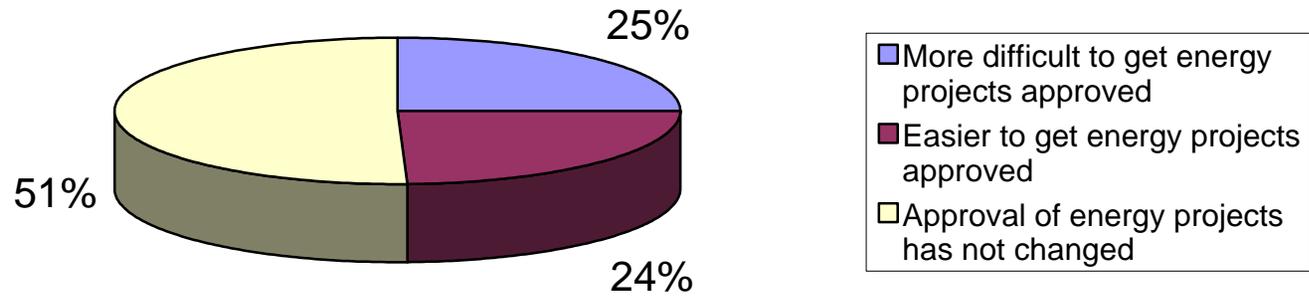
Field of Employment	Count	Percentage
Consultant	124	27.31%
Contractor/builder	22	4.85%
Education	13	2.86%
Energy User (Building, plant, facilities, industrial)	105	23.13%
Equipment supplier	12	2.64%
ESCO	44	9.69%
Government (local, state or federal)	56	12.34%
Other	16	3.52%
Research and Development	7	1.54%
Utility or energy supplier	55	12.12%

454

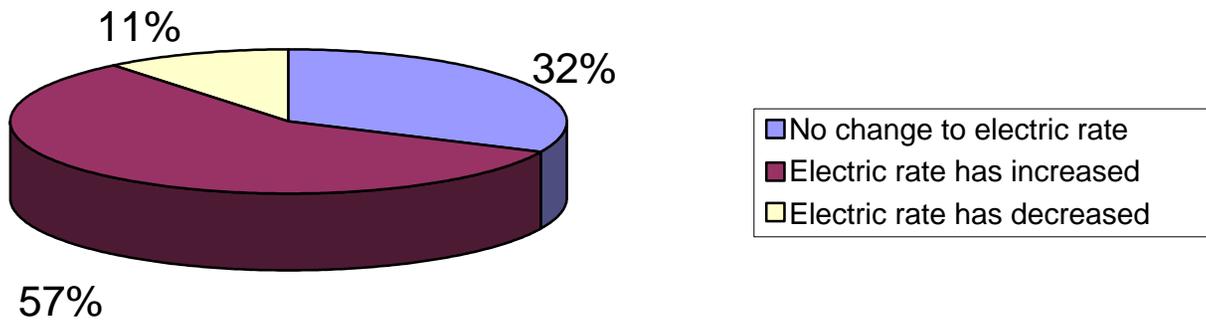
11. Job Responsibility



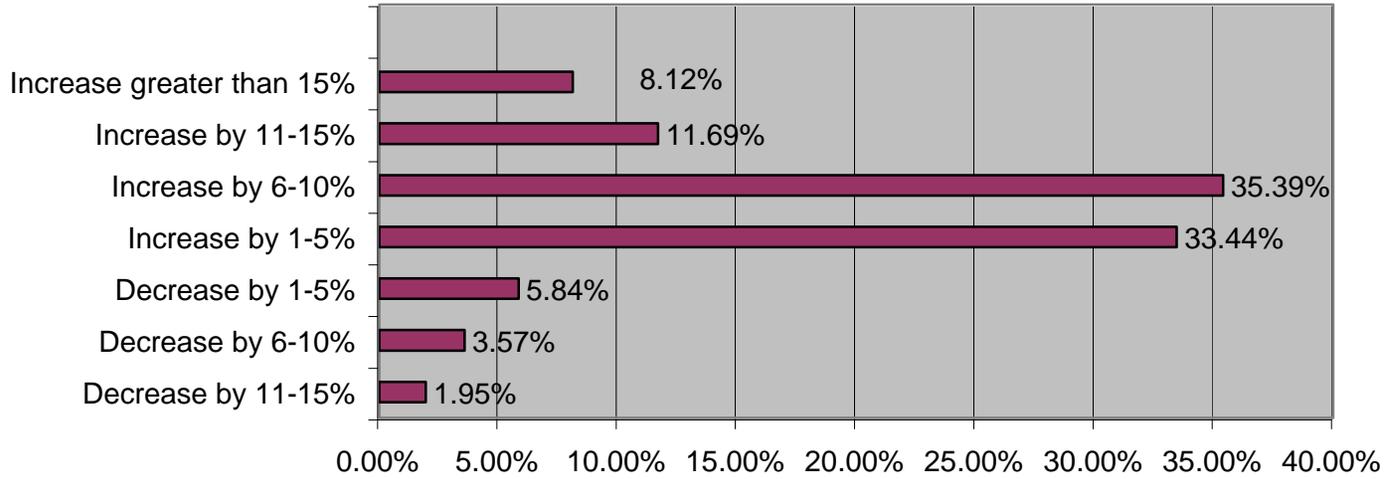
12. As a result of current or pending deregulation, it is



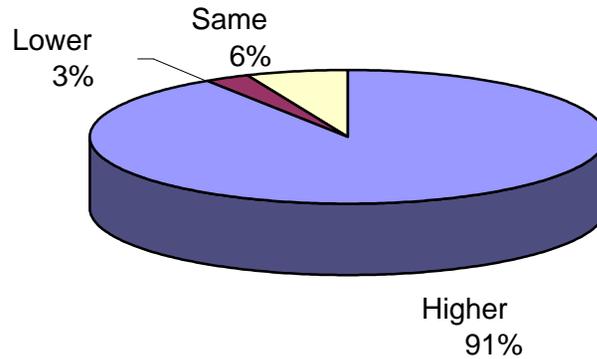
13. How has your electric rate changed in the past year?



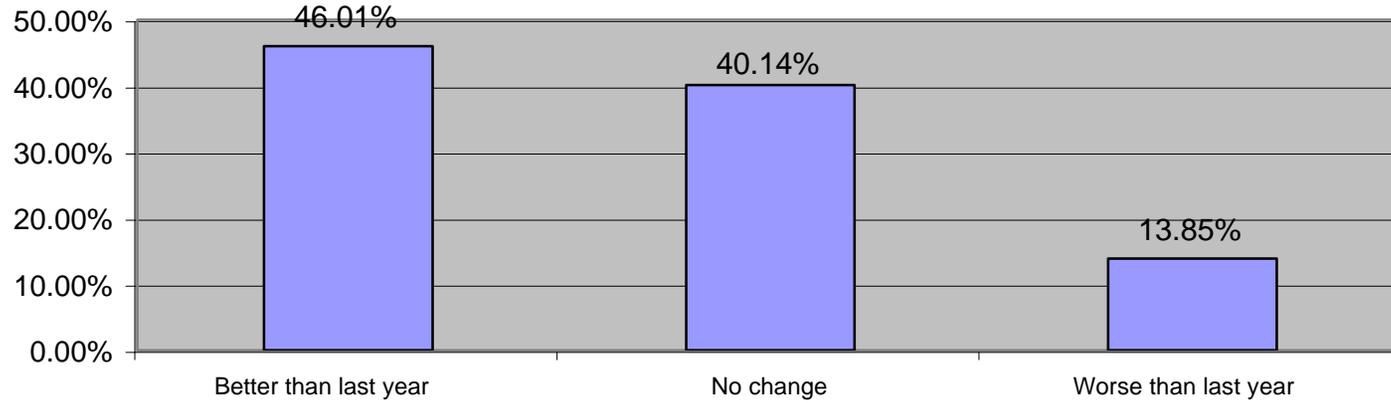
14. If your electric rate has changed, by how much has it changed?



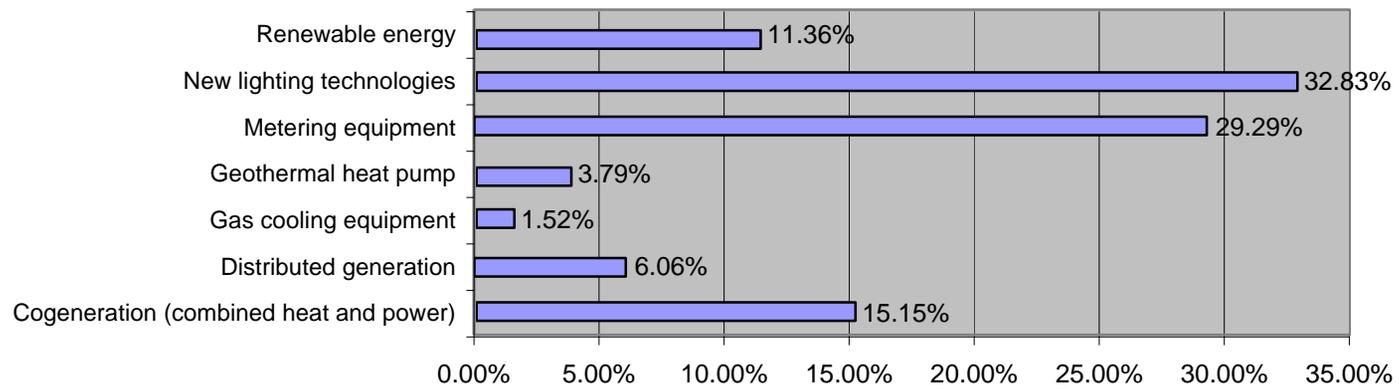
15. What will the average electrical costs be in three years?



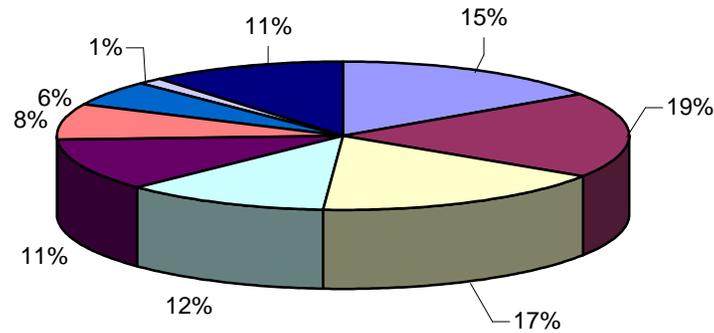
16. How effective is your energy- and cost-reduction program this year as compared to a year ago?



17. Which technology listed below is the highest priority for application at your facility in the near future?

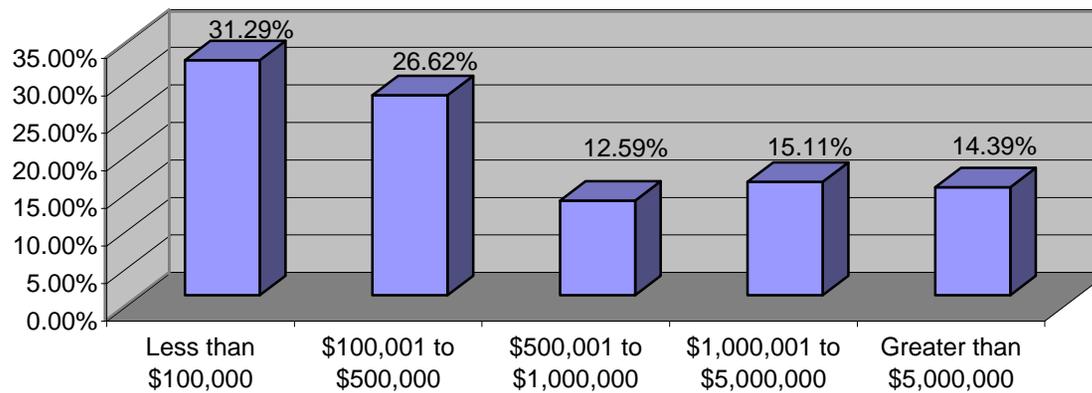


18. If you are an energy user, what are the estimated accumulated energy savings that your company has made since the program as begun?

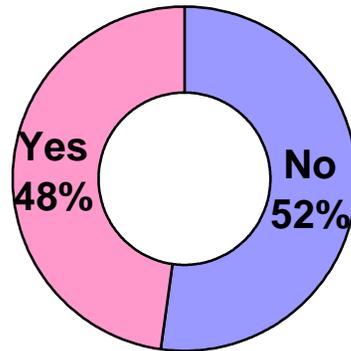


- 1 to 5%-46
- 6 to 10%-56
- 11 to 15%-50
- 16 to 20%-35
- 21 to 25%-34
- 26 to 30%-23
- 31 to 40%-17
- Greater than 40%-4
- None-33

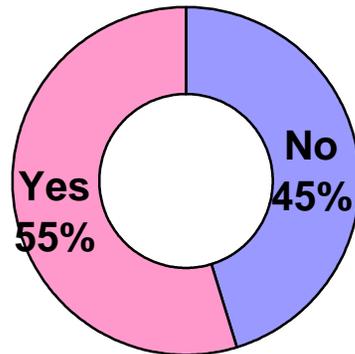
19. If you are an energy user, what is the estimated total accumulated energy cost reductions since the energy reduction program was started?



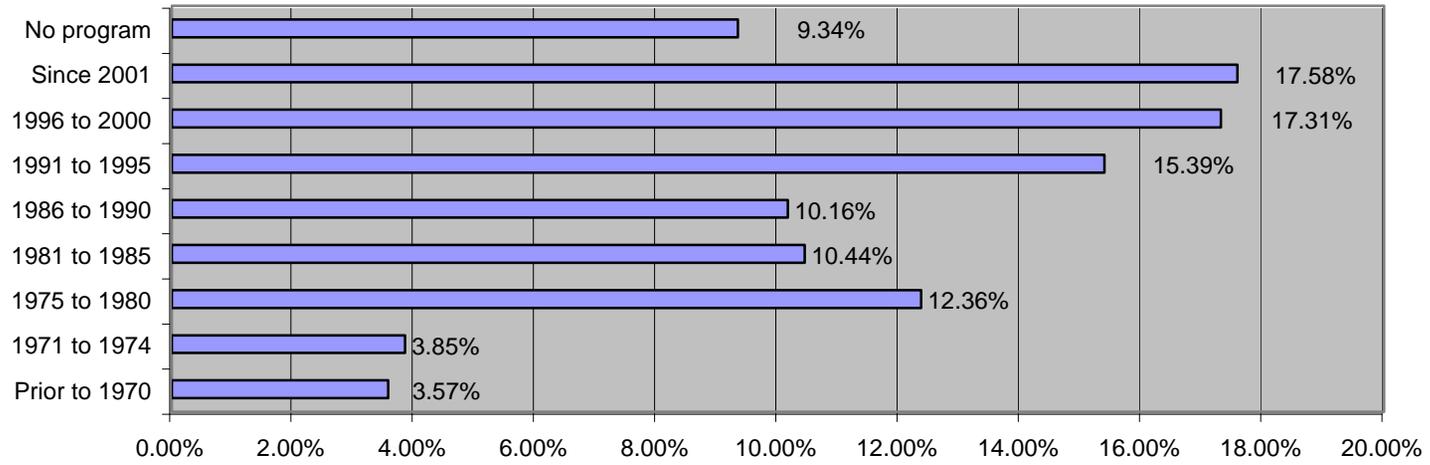
20. If you are an end user, has your company used an energy service company to finance energy projects?



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



22. In what year did your company/organization begin the energy management program?



Part III – AEE Income and Salary Survey

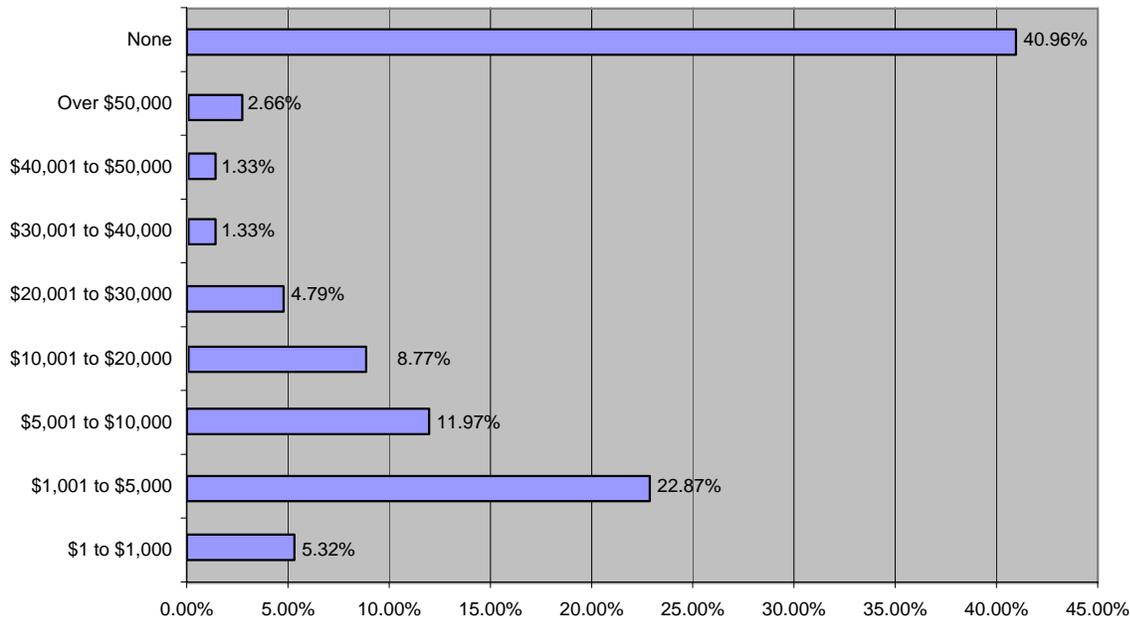
Only those who were full-time employed as of January 1, 2001 should complete this section. (No students please.)

23. Please input your base salary (to the nearest \$10,000) from January 1, 2003 to January 1, 2004, (exclude bonus, overtime, fees, and income from secondary employment).

Base Salary	Count	Percentage
\$10,000 to \$20,000	3	0.73%
\$20,000 to \$30,000	1	0.24%
\$30,000 to \$40,000	7	1.70%
\$40,000 to \$50,000	31	7.54%
\$50,000 to \$60,000	50	12.17%
\$60,000 to \$70,000	66	16.06%
\$70,000 to \$80,000	95	23.12%
\$80,000 to \$90,000	57	13.87%
\$90,000 to \$100,000	45	10.95%
\$100,000 to \$110,000	26	6.33%
\$110,000 to \$120,000	10	2.43%
\$120,000 to \$130,000	4	0.97%
\$130,000 to \$140,000	7	1.70%
\$140,000 to \$150,000	1	0.24%
Over \$150,000	8	1.95%

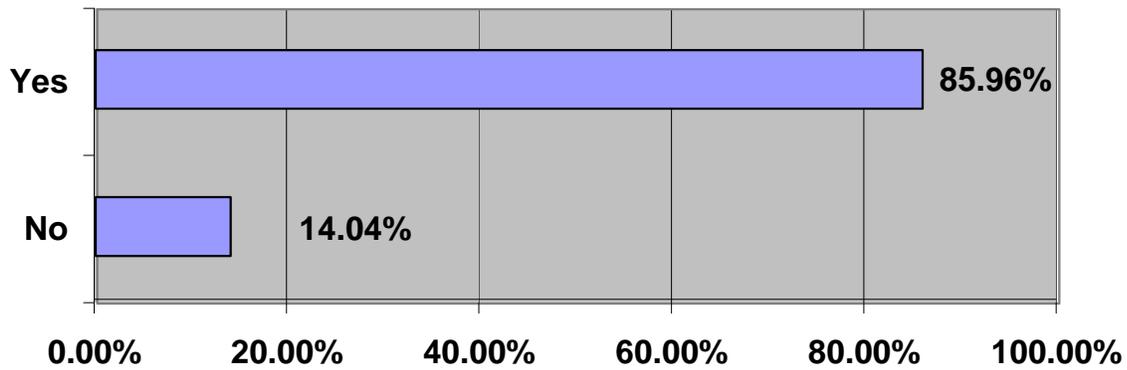
*Average salary was approximately \$77,043.80

24. Please input your additional income (to the nearest \$1000) from your primary job, such as bonus, overtime, and fees.

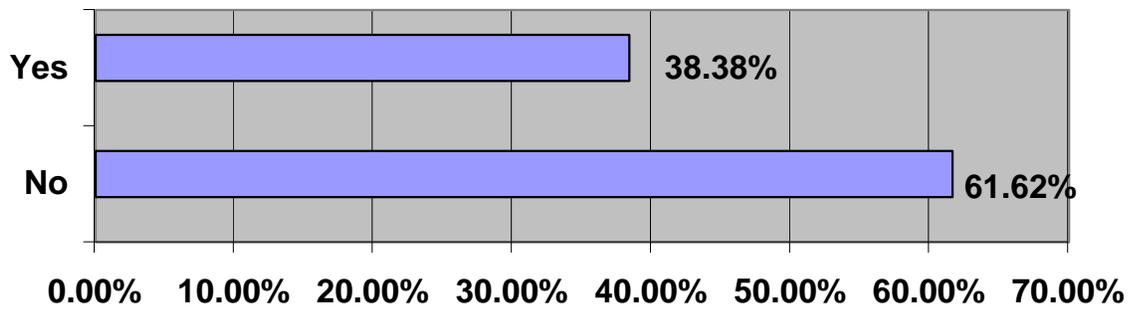


*Average additional income was approximately \$6,517.31

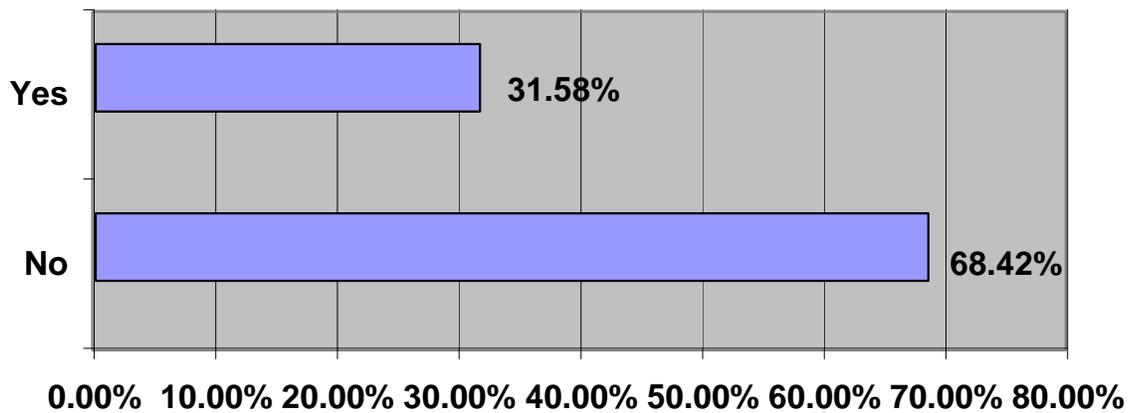
25. Are you a graduate from a 4-year accredited college?



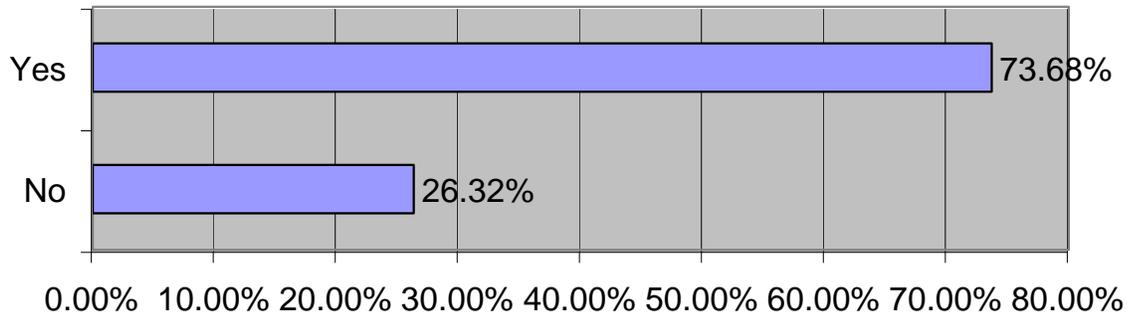
26. Do you have a post-graduate degree from an accredited college?



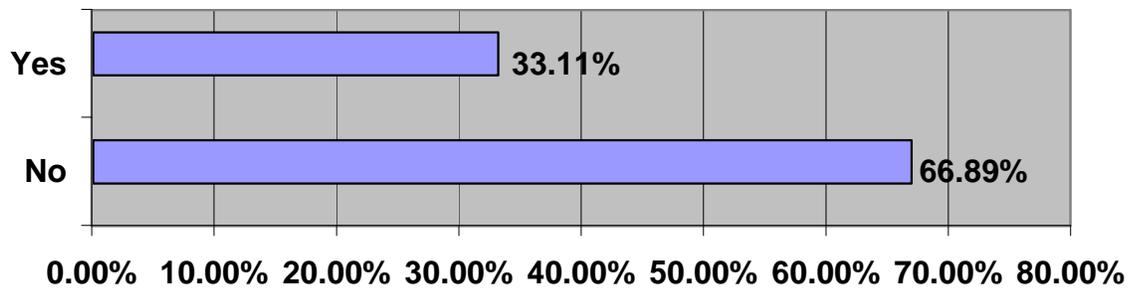
27. Are you a registered Professional Engineer or Architect?



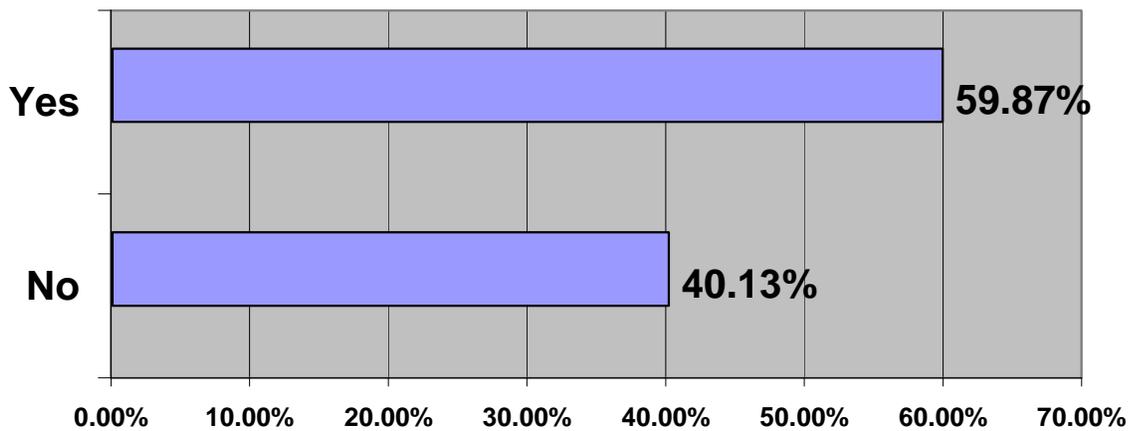
28. Do you hold a valid certification from AEE, such as a CEM, CLEP, CDSM, CCP, CEP, CIAQP, CIAQT, CTAB, or CGD?



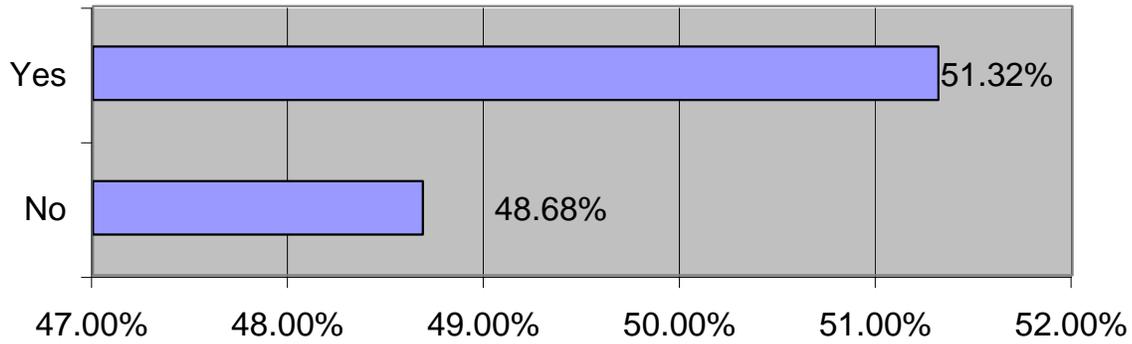
29a. Since you have assumed energy management responsibilities at your company, are you: Receiving significantly higher compensation than before?



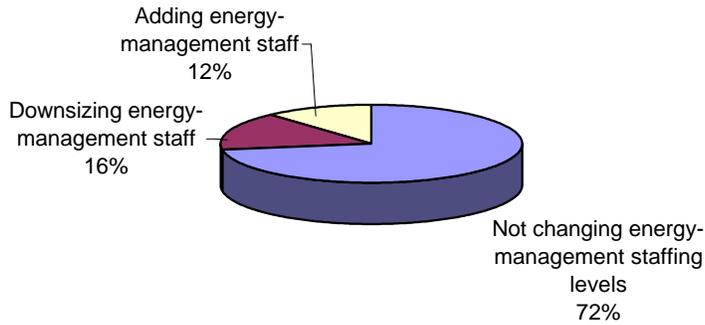
29b. Receiving higher visibility?



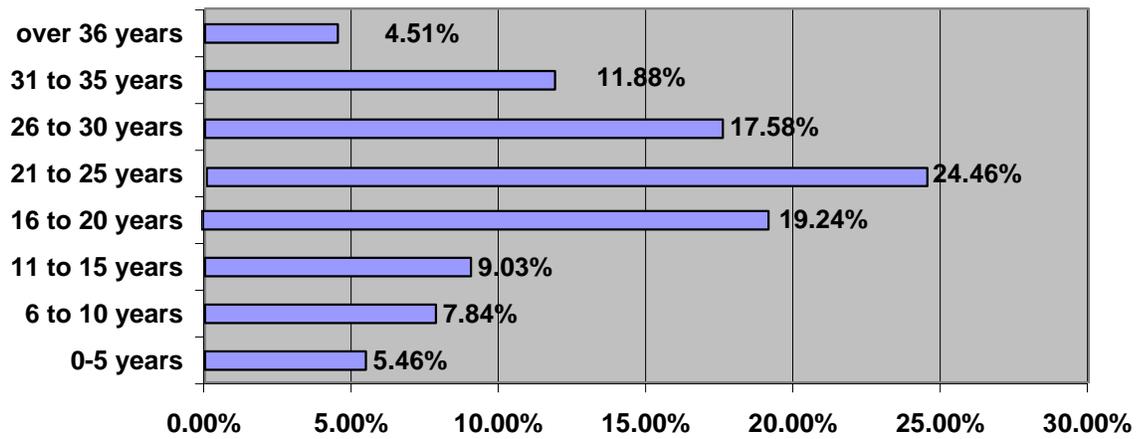
29c. In a better position for advancement?



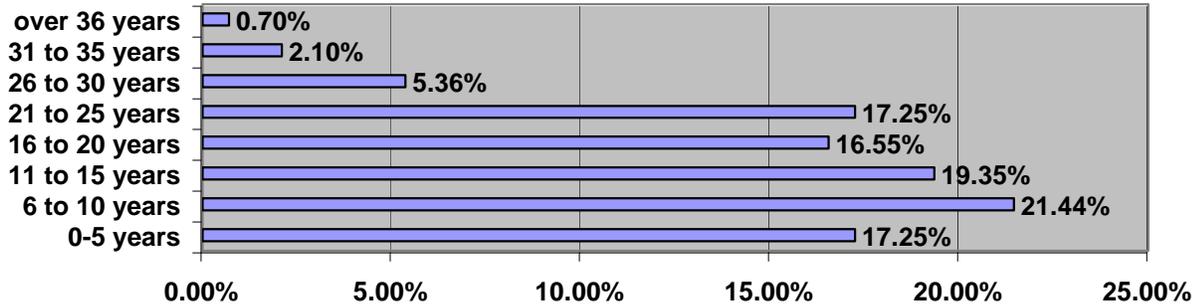
30. Is your company currently:



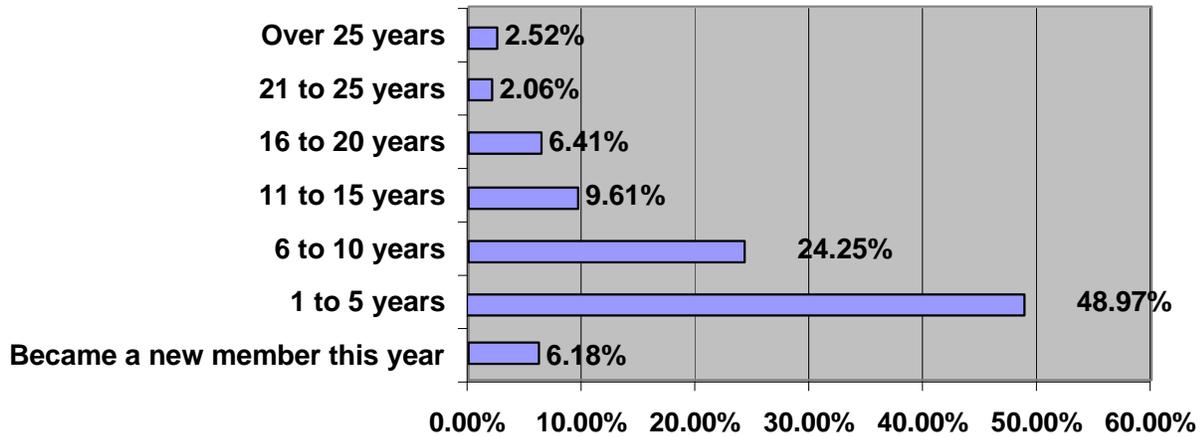
31. How many years of experience do you have?



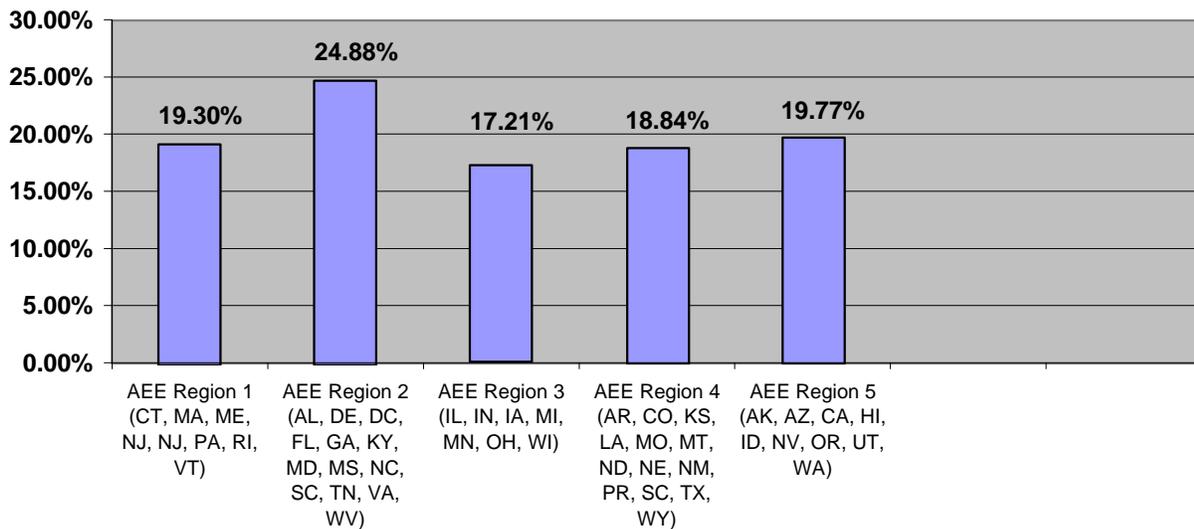
32. How many of those years have you been involved in energy management?



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

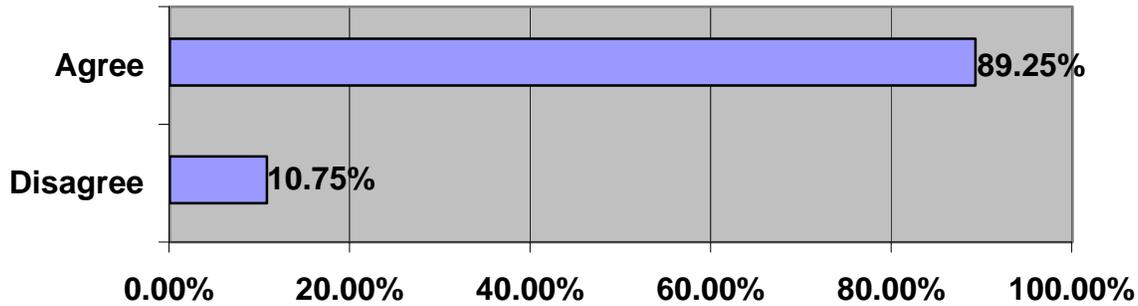


34. Please identify the location where you are employed?

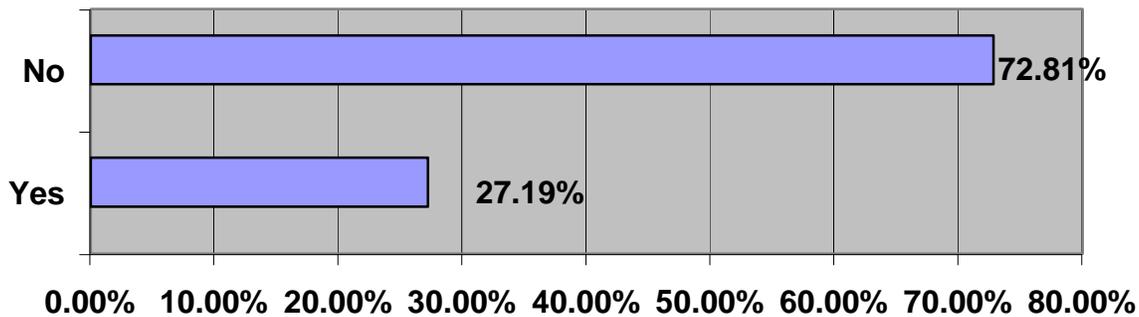


Part IV – Electric and Gas Purchasing and Energy Services

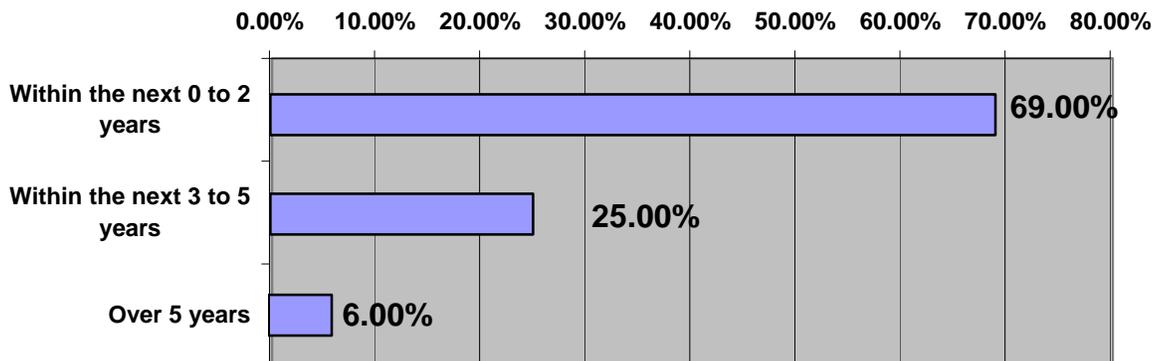
35. Distributed generation and cogeneration (combined heat and power) will become more important because of reliability and energy security issues?



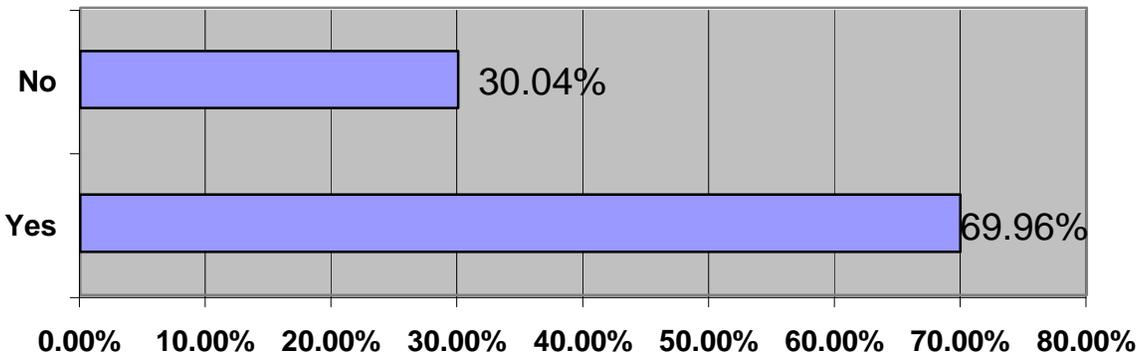
36a. Is your company planning to install a combined heat and power system?



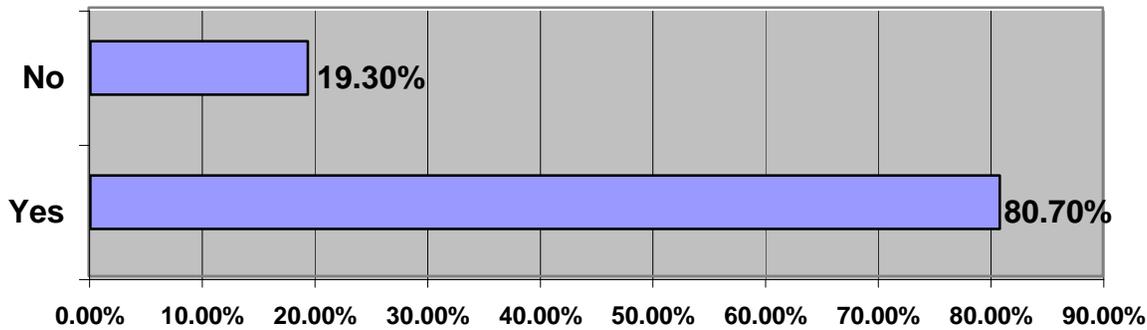
If yes, when?



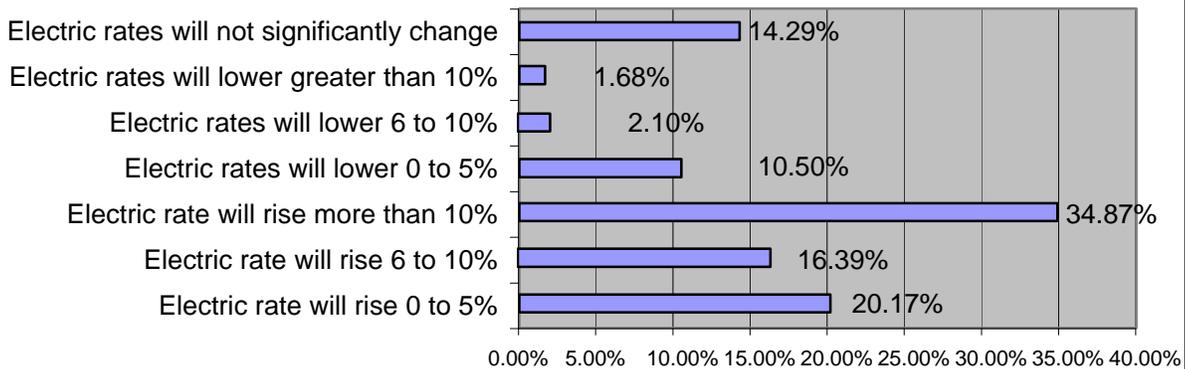
37. Do you believe it is a good idea to deregulate the electric utility industry?



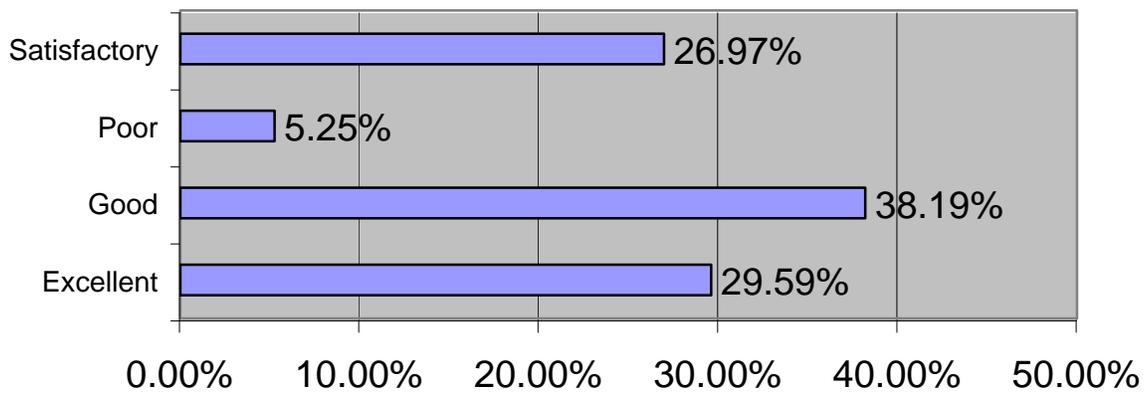
38. Do you believe the reliability of the national electric transmission grid has become less reliable in the past few years?



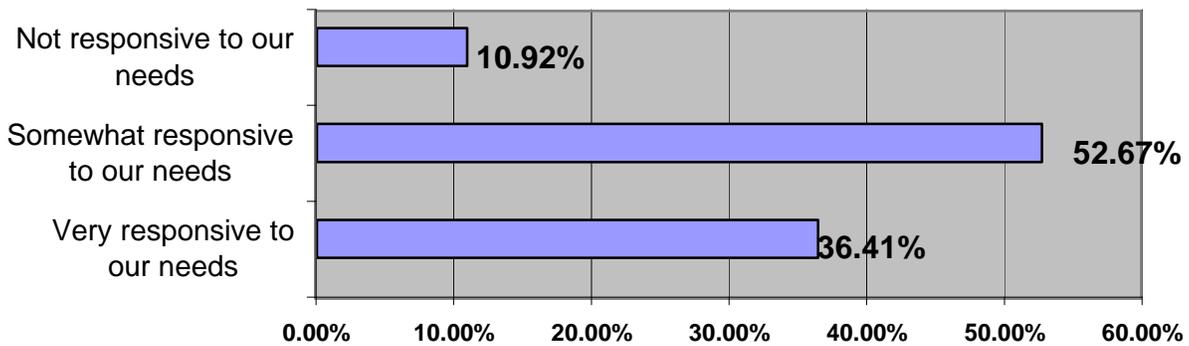
39. If you are an end-user in a State that has not yet deregulated the electric utility industry, what do you believe will be the cost impact to your company in a deregulated market providing customer choice?



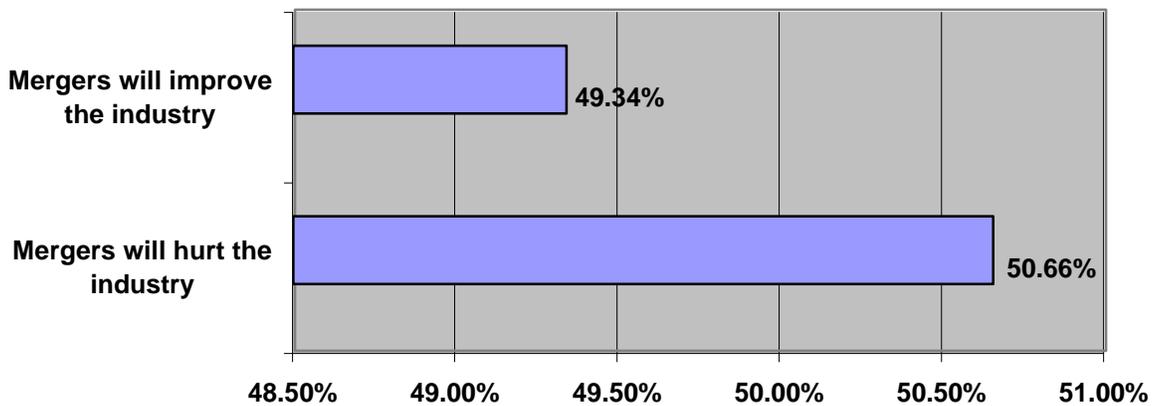
40. How do you rate your existing electric service provider?



41. How do you rate the customer service from your electric service provider?

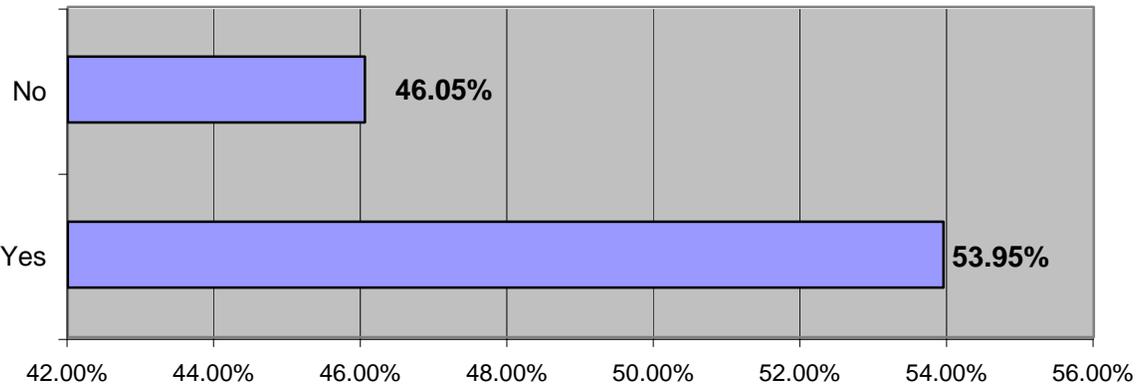


42a. Will utility mergers improve or hurt the energy industry?



42b. In what way? ([Click Here](#) to see responses.)

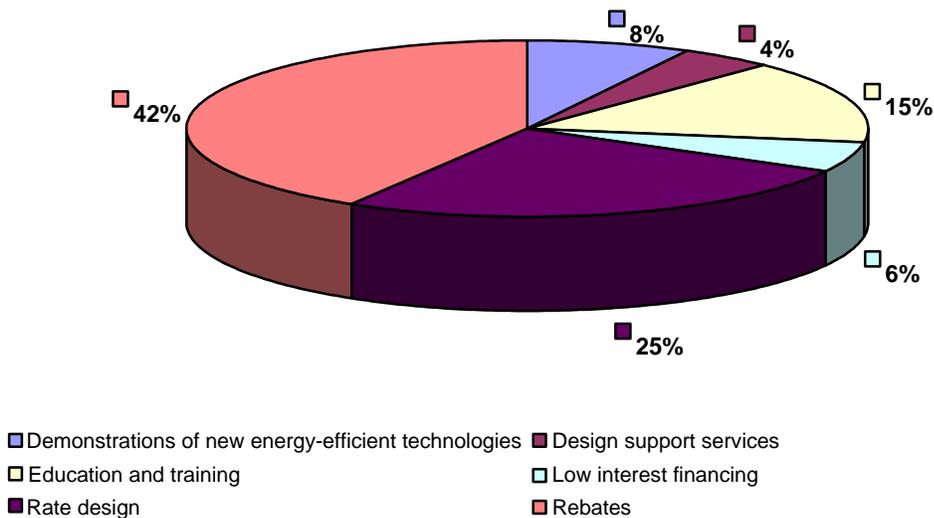
43. Do you see your role expanding to include energy commodity buying decisions?



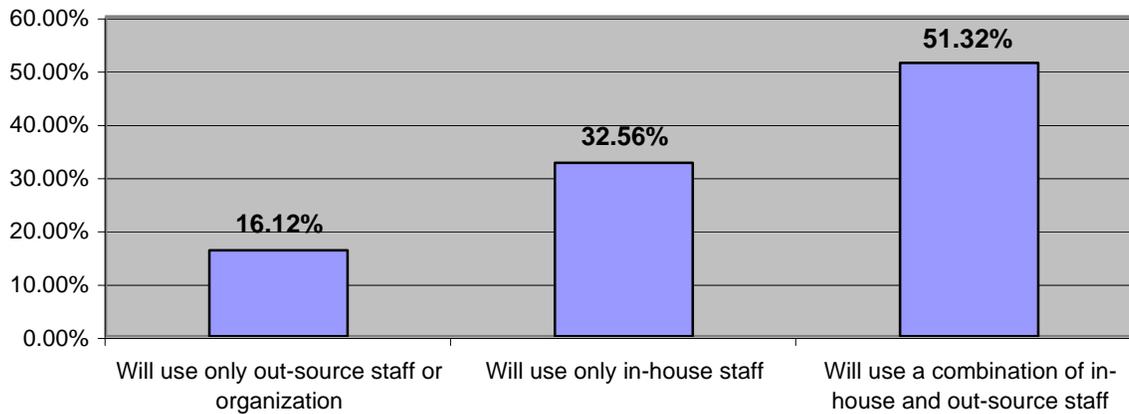
44. The biggest barrier to implementing a performance contract is:

	Count	Count
Contract cost mark-ups are too high	63	15.18%
Financial terms in the contract	31	7.47%
Lack of understanding of how the contracts work	83	20.00%
Measurement and verification of savings	171	41.20%
Other contract terms	27	6.51%
Unclear operations and maintenance responsibilities	40	9.64%

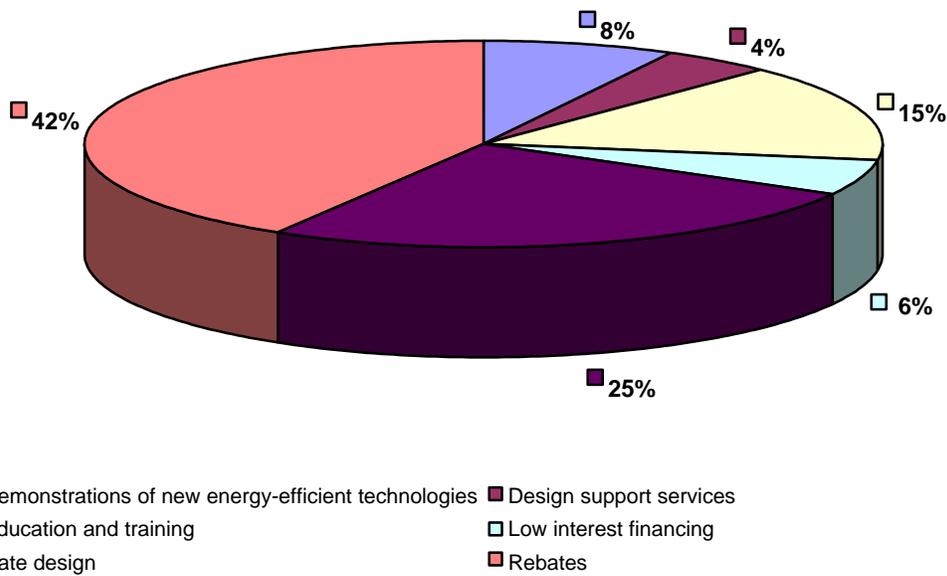
45. What is the best way for utilities to encourage energy management activities by their customers?



46. 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?



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



48. List your top 5 resources for new energy information.
([Click Here](#) to see responses.)

49. Which of the resources you listed above do you consider the most important?
([Click Here](#) to see responses.)

Question 42b Responses

less competition

Make for more compatible systems, lower costs.

Less competition - higher cost. Less customer service - have us trapped into using them.

decrease competition

Increasing the regional distribution networks.

Less personal service. Fewer efficiency programs.

The system reliability will continue to drop.

Economy of scale. Costs distributed over a broader base.

Better able to pool resources to provide better customer service.

Don't ever want to see monopolies set up by mergers of energy producers. If this happens the price of energy will skyrocket ... given the opportunity energy producers will gouge endures....look at California.

Competition will be limited the more mergers there are.

infrastructure

I find that the larger the utility becomes they also become less client responsive

When the company's main headquarters is far removed from the user the service level at times seems to be reduced.

Less responsive to customer needs, more responsive to stockholder needs. Too much political and economic power. Lack of competition.

To big, too complicated

Better utilization of resources.

More clout and less able to create change.

Bigger company = poorer service.

No local accountability - pure money machines

Reliability and keeping cost down

More profit driven, less competition.

Reduce costs

Reduce redundant overhead costs

LESS COMPETITION

Local providers maybe be replaced by national companies and the present customer service representatives will become non-existent.

Less competition.

Renewable must be encouraged.

smaller is better

Less competition will create the chance for price increases.

Economy of size. More condensed use of resources, people and material.

economies of scale tend to have less folks "in the field"

Mergers will tend to make the industry more efficient

What is the price of oil after all the major oil companies merged?

More monopolization of goods and services; Less incentive to do energy efficiency programs; More political power concentrated in fewer hands

I haven't seen it work for the good of the order yet!

What's your phone company? What is your standard air line company you use?

help to make them more competitive

Better coordination of electrical generation and distribution.

LESS COMPETITION

Consistency in conservation programs

make stronger companies better positioned to support fluctuations in supply and demand.

Less competition will drive up prices (the industries will prosper, consumers may suffer.

Mergers improve the industry from a marketing standpoint. Fewer players means less competition, therefore greater potential for profitability. Customer/consumers will be hurt at the pocketbook.

Question 42b Reponses Cont.

Reduced responsiveness to customers
Too-large organizations lack flexibility
Few if any improvements in services
Loss of jobs hurts the community
Unclear actual consumer savings
Financial risk, investor losses
More monopolistic
Economy of scale
cost reduction
Hardball !!!
Deregulation has hurt the common consumer.
Add to the availability of suppliers.
Remove responsibility for operations to far offices
Decreased competition with no regulation guarantees price gouging.
National interconnection and transmission should improve.
Consolidation of power will decrease copetitive opportunities.
Reduce competition
Mergers can create monopolies, which will not work well in a deregulated system.
Utility (non-production) mergers will focus more resources on regional T&D across traditional utility boundaries, resulting in a better grid.
mega corporations get too large to really be as efficient as they should be
Decrease customer service.
Mergers should increase availability of high quality professional engineering and management talent to smaller utilities.
I'm concerned about the overall impact on energy costs if control is concentrated.
local accountability goes down
Downsized and less responsive to customer needs.
Synergies in back office operations.
They will be forced to downsize for lower costs to eliminate duplication of effort.
Increased economy of scale for the distribution companies.
They are done for the purpose of driving up the stock price, not to make better companies.
Everything becomes tried to the dollars.
You loose the customers caring at the top and everything becomes money.
Less responsive.
More monitoring
Allow struggling providers to combine with solid providers to enhance stability.
Education of internal customers
lees local influence
The companies will flounder to arrive at a stable set of offerings, and will also flounder in assigning responsible parties for customer service. Staffing levels will decrease locally and shift to centralization, leaving local connections and relationshi
too large a company restricts creative thinking.
Mergers will lessen the competition in the electric buying and selling market.
stability
More capital to improve system.
Reduce competition, reduce variety of approaches to problems.
Don't see mergers changing much
Deregulation will do exactly what the Government was trying to avert, creating one or two giant utilities. Bad idea.
Best practices of each company will win out and benefits roll downhill to consumer.
No impact to the industry. Impact will be upon themselves, and the outcomes, positive or negative will be in the way the are managed. They will ultimately need to become more like an ESP, and take on the same qualities in order to be competitive, or suc
decrease competition

[Click Here](#) to return to Question 42b.

Question 42b Reponses Cont.

Less competition.
Reduce customer service, decrease response time, increase rates
Larger companies often lose personal connection/customer service
In the same way that the phone monopolies hurt the industry.
Competitions lessened
Less competition
Increased corporate inefficiency (utility mentality)
Prices will increase.
They will restrict competition
Area distribution is very important to the end users. It will be hurt through cost reductions as mergers develop. Focus will be on transmission & profit at the cost of distribution.
It will be harder for mid size and smaller business to get the service they need in terms of "are they on the best rate"....will lose any personalized service they get now.
Up to a point. Economies of scale can reduce cost and provide more focus and consistency for a larger geographic area. It is important that the utility maintain its commitment to its core business of providing reliable electric service.
Bigger is not better. Lowering of customer service levels, disenfranchised employees with more work loads, etc. There is something to be said for a smaller, well run organization.
economies of scale and more efficient/less redundancy in services
History repeats itself. This nation was controlled by a few large energy companies and then was forced to diversify.
The only way utility companies can improve infrastructure (generation & transportation) without government intervention is to strengthen their own financial position.
In a perfect world I can see economies of scale benefiting the industry. That said, this is not a perfect world. I don't believe that utilities with their own beauracracies and politics, merging with one another will benefit the rate payer or even the in
less responsive to customer needs
Reduce competition and hurt consumers
less competition, lower customer service
In the eventual deregulated industry less competition will hurt large industry choices for power contracts.
Limited mergers will help by allowing more investment in service and options. But, whole large mergers will limit the responsiveness of the companies, but taking away their need to or desire to service the customer. Utilities will become the unfeeling m
While mergers will provide utility providers with an economy of scale, it will in the long run reduce competition and thereby de-incentivize investment in infrastructure.
It will limit the competition in the marketplace for excess generation capacity. Thus limiting the wheeling and selling of excess capacity which reduces cost to the consumer.
- will detract from customer service with remote locations of new parent companies.
Decreasing competition and increasing focus on ROI rather than service.
Able to afford more/better lobbyist
Reduce competition and the drive for innovation .. bigger ships take longer to turn.
By the utilities merging this hurts the consumer by several ways. It reduces competition which reduces choices. It monopolizes their market share and the end user looses the customer service by the lose of competitive service.
Need more generation diversity to prevent market power
The utility company has significantly reduced it's O&M staff in order to become more profitable and that means they are cutting corners somewhat on preventive maintenance and general services.
Mergers will improve the industry as engr'ng/construction standards will become uniform amongst the merging entities. Mergers alone will not improve the industry, though.
Increase competition between bigger players. Create better product reliability
Combining of companies always results in cost reducing initiatives (bean counters) which inturn results in reduction of work force. Which equates to less time an money spent on maintaining system distribution.

[Click Here](#) to return to Question 42b.

Question 42b Reponses Cont.

Competition encourages lower utility rates.
Allow for more resources to be brought into use for technology upgrades
Customer service will be slashed because the positions do not add revenue to the larger company.
Companies tend to overlook the value of keeping their customers happy.
Centralizing of services takes away from the local communities and weakens the industry. Without a local presence, utilities are less personal and have less of an investment in the community. This distancing makes the utility less of a local concern andm
They'll become monopolistic again.
Larger less personal, less responsive
With more mergers there will be more market manipulation.
monopolies, less people because of downsizing which curb service, they can minimize supply to artificially increase demand so they raise prices
Will reduce op costs by spreading over wider range of number of customers and reduce redundant activities between the merged companies.
De regulated areas will impose strict environmental regulations regarding power generation. Nox emission standard will become un obtainable and curtailment costs will sky rocket with the need for new scrubbers.
In the beginning of the mergers the customers will benefit slightly, but as the utilities grow in size, then the customer will be less important than the bottom line profitability.
Shared resources will keep costs from soaring and enable implementation of regional best practices.
Mergers of utility holding companies to form larger regional gas and/or electric companies with multiple state utilities tend to integrate policies across their footprint to standardize operating, purchasing and customer service acitivities. This tends t
Standardization within a merged area will create better reliability,,though connectivity between larger utilities will continue to be a significant problem.
Reduce redundant overhead staff, allow more low cost wheeling over long distances
Mergers will help in eliminating redundant activities which in turn will help control costs.
Some consolidation will benefit the efficiencies of utility's need for R&D, efficiency of service provided, etc. However, too much consolidation can lead to oligopoly (e.g. the California crisis)
42. Reduce costs.
43. We already do it.
Less competition means higher prices. Merging companies do not pass along savings to rate payers but use the savings to drive stock prices higher so management can parachute out.
Improved coordination of resources
The development of a potential monopoly of the power & energy industry will only place large amounts of money in the hands of a few people and hurt the consumer who will be the ones providing the large sums of money to the few.
Less customer service
Based upon observed impact when other utilities have merged. I am very satisfied with our Electric supplier, GA Power...so why change it. Natural gas cost is determined by external factors beyond the control of our gas supplier, TEXICAN.
Higher prices and less service.
Less emphasis on service, more emphasis on profit
Eliminate the small high cost providers.
The more effective companies will operate those that are less effective, thus improving service
More internal focus and less external society benefits
Larger companies are better able to handle major disruptions, and get things done to benefit their customers; unfortunately they seldom are inclined to do so. They are better able to defeat regulatory initiatives and monopolies the market. I believe no n
less competition between utilities means higher rates
losing touch with the customer base; less responsive to needs
It will reduce competition.
More confusion and a slowing to act. Large companies become more conservative and less responsive to local forces. There will be a trend away from local control and toward a less customer centric model.

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Question 42b Reponses Cont.

Response to customers will be reduced.
even though mergers will probably achieve lower operating costs, there will be less competition, which will hurt the end user.
This is not either or. There are advantages and disadvantages with either choice. Larger companies tend to have more capital for system upgrades, but also those that run larger companies are generally more greedy and less customer and service minded; ther
less customer support higher prices
More closely approaching a true monopoly due to lack of other energy company pricing for comparison. Also more distance from customers which always means poorer response to customer issues.
By replacing regulated monopolies with unregulated monopolies.
Synergies
I expect to see less vertical integrated utility companies with unregulated generating subsidiaries as well as emerging specialty businesses such as meter services, billing, DSM and customer service/contract services. These various companies in particula
Mergers generally lead to layoffs because of duplication of staff. However, because the stock prices/bottom line drives the business, many layoffs come from the wrong areas. Customer service and line crews are usually cut to the bone, so reliability and
I am of the opinion that mergers will take the positives from all involved entities and expand on that in the effective delivery of their services. Likewise, the items, policies or procedures that have had a negative impact would surely be abandoned.
I believe the little utilities such as the cooperatives will be hit the hardest. They have a specific place in our society and fit a certain nitch. Few IOU's want the loads that they have. It will encourage to ascertain extent, as well as force the litt
I believe the little utilities such as the cooperatives will be hit the hardest. They have a specific place in our society and fit a certain nitch. Few IOU's want the loads that they have. It will encourage to ascertain extent, as well as force the litt
Economy of scales
I believe the little utilities such as the cooperatives will be hit the hardest. They have a specific place in our society and fit a certain nitch. Few IOU's want the loads that they have. It will encourage to ascertain extent, as well as force the litt
Higher Costs, less competition in deregulated market.
In dollars,(rates will rise).
Reduced customer service. Moving further from the customer, and overall decline in energy related jobs.
Large utility companies will dominate the market (wield market power) and will dictate energy infrastructure and interconnect policy. Their main interest is to maintain their electric regional monopolies. For deregulation to work, you need to deal with
Bigger companies tend to consolidate their customer sevice activities into call centers. There would be less field staff to call on their customers.
Cost Savings - eliminate duplicate functions
oliopoly
Less competition.
Less competition
Greater influence over regulators
Monopolies are never good!
Mergers should reduce costs through economies of scale.
one company can control cost.
personnel cuts will reduce maintenance labor and reliability
In the same way mergers have hurt manufacturing, medical, newspapers etc. Basically making business less local hurts the quality of that business.
Less competition
Economy of scale.
Less innovation.

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Question 42b Reponses Cont.

decreased support for infrastructure, less reserve generation, remote management etc.
For the same reason that distributed generation is better than centralized generation. Mergers will further emphasize pure electric generation and national grid-based sharing, rather than emphasis on finding a way to generate close to where heat or cool
Sharing resources and expertise.
Mergers will remove management further from the end users and their input will become even less meaningful
Removing competition
Mergers will give the utility companies a stronger voice to elected officials. Legislation can then change to encourage development of alternate energy sources and better stewardship of our existing resources.
By merging it will narrow the competition pool.
Will slow down communication. Harder to find people willing to be responsible. Easy to say "corporate is holding up things" Mergers lose sight of details by focusing on "big picture".
As they merge they focus more on their core business of delivery energy solutions to the C/I and Residential customer.
Economy of scale
Create more foreign ownership leading to less local investments.
Less competition
Less competition
More financial power for larger companies. More companies serving multiple areas where a small company may only be able to serve a given area. May create a more global view of the grid.
necessary for competitive market but am concerned about customer service when this occurs
It will decrease market competition and lead to more Enron fiascoes
Customer service may increase
More focus on the \$ from large regional companies. Less concern for local issues. Less likely to be a good corporate citizen. Less concern with individual customer needs. Less concern for individual employee needs.
Monopolization and price control through coordinated maintenance routines, round trip trading, scheduled outages affecting peak demand and affiliated pricing.
Monopolization and price control through coordinated maintenance routines, round trip trading, scheduled outages affecting peak demand and affiliated pricing.
Larger organizations tend to be less responsive to customers, although that remains to be seen.
potential to create large monopolies -- need for competition
Reduce operating costs
Economies of scale
monopoly position always yields increased prices
will result in monopolies and price fixing
Less competition
Less customer service and less opportunity to negotiate prices and services
Will exercise market power to control their margins at higher levels.
Industry focus will be toward more regional issues, losing sight of or taking a reduced focus on local issues.
Being in a low utility cost area, mergers will cause the price of the local utility to rise to compensate for the higher prices of the mergee companies.
believe that the competition will favor companies that deliver better customer service
service will be more centralized taking longer to get to affected area and harder to get in contact with someone who is a decision maker.
Conglomerates will take over and continuously increase the cost of utilities in the name of supply and demand in an ever-increasing and growing environment. Like the oil producing industry is doing now in the name of profits. Utilities are a necessity and
Customer Service is an issue.. Before the electric power suppliers became so cost competitive, service much easier to find.
less responsive to smaller customers
Less competition, higher rates,

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Question 42b Reponses Cont.

Probably get rid of any access and improve productivity & efficiency.
Remove local management and investment.
BECOME MORE IMPERSONAL
DECREASE CUSTOMER SERVICE
Less competition
There will not be examples of excellent performance, only one example that says it does excellent.
There may be a risk of having a few mergers growing so much that competition could become limited again.
Become more monopolistic
less competition
The companies get so lean their is no room left for services.
Local control is taken away - much more difficult to have something accomplished.
monopolization, fewer choices
More consistent rates & services.
Large mergers could reduce competition. reduced competition could mean higher rates.
Larger companies will have greater buying power but may be less people oriented.
They will downsize people, jobs, services!!
Mergers should help reduce cost. However with 50 different PUCs savings could be greatly limited due to different regulations, requirements, & focuses.
The bigger they are, the sell responsibility they take on. It is someone elses problem!
The bigger they are, the sell responsibility they take on. It is someone elses problem!
The bigger they are, the sell responsibility they take on. It is someone elses problem!
Companies will be driven even more to emphasize bottom line profits over improvements in operations and customer products.
Down-sizing seems to go along with mergers. From what I have seen in other industries or providers, there are fewer representatives for a given service area after a merger. Hence, poorer service.
Bureaucracy breeds inertia.
less competition
Lower fuel costs due to economies of scale.
No focus on the real world of meeting customers needs. First Energy has continued to reduce intelligent staff capable of really running the business, rather than employing cheap staff to answer the phone. The live to try make numbers the financial people
I have no confidence in a system where politicians and lawyers are calling the shots!
by reducing competition and wrapping up utilities in larger companies that will not be able to respond to their customers needs and the needs of the employees.
Reliability will suffer in order to be more competitive.
Over centralization of customer service functions and out-sourcing have made mergers and acquisitions very unreliable in the short term (1 to 3) years but as new processes opke are truned then j
Higher costs.
Big business gets further away from real concerns of it's customers. Customer service suffers. Staffing decreases, taking jobs away from local community.
Improved reliability
Improved continuity
In Regulated industry, mergers will improve reliability
consolidation of services, economy of scale should improve sevice and reliability...less finger pointing when issues arise.
Larger companies will circle the wagons and lobby the govt. to maintain the fewer-larger status quo, instead of moving toward higher efficiency end uses and renewable sources.
more bureaucracy
You should allow a third option: neither. In some cases mergers improve the industry due to efficiencies. In other, there is a loss because there is less choice and fewer services.
I see the businesses as getting very fragmented: new owner sells off generation, keeps transmission, for example. No one entity responsible for generation and delivery.
Less interconnect issues.

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Question 42b Reponses Cont.

Less responsive
Consolidation of costs...reduction of overhead
Provide more reliable energy.
Less competition, less selection, the potential for monopolies, higher rates, poorer service.
Too much attention is on Wall St. and not enough on customers and employees. Outrageous incentive compensation plans for senior management are out of control. Mergers have been and will continue to be bad for customers and employees and the US economy.
I believe it will ultimately drive prices higher.

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Question 48 Responses
AEE
seminars eun
ASHRAE IESNA Manufacturers Researchers Utility Company
AEE; news; local engergy membership
Internet AEE articles Reading about new technologies Researching the operation of existing facilities TV News
AEE, local utility
Professional Organizations Technical Publications
SDREO, Energy 2003 conference, Regional Energy Manager, Trade journals, other peers
AEE ASME In House
Energy Users News Engineering Systems EREN OIT
AEE SCE WSJ
Inside FERC's Gas Market Report Energy Engineering (AEE) Platts Power ASHRAE Journal AFE's Facilities Engineering
AEE ASHRAE Internet News media Colleagues
ASHRAE
Green Building Council AEE AIEEE ASHRAE Transmission and Distribution Mag

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Question 48 Reponses Cont.

The sun The wind Any type of waste product
AEE Energy Providers Magazine Articles News Other Engineers
AEE Magazines Web Universities National Labs
Natural Gas Marketing reps Local utilities DOE Manufacturers' Engineering sales reps Monthly Publications
EUN Ashrae AEE Transmission and Distribution
AEE trade publications energy management organizations
AEE ASHRAE Local News Radio TV
AEE Gas Supplier Utility Company Newspapers Trade Magazines
1. utility 2. AEE 3. publications 4. technology companies
Colleagues Energy Central Business News
AEE, ECM, SCIENTIFIC AMERICAN
Magazines, Internet, Professional Organizations, Providers, Networking
Alliance to Save Energy American Solar Energy Society Association of Energy Engineers Home Power Magazine Green Power Magazine

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Question 48 Reponses Cont.

Seattle City Light AEE Lighting Design Lab - Seattle Google Modern Marvels - Cable
Sustainable Energy Coalition Connecticut Business & Industry Association (CBIA) ASHRAE
UTILITIES MAGAZINES SEMINARS VENDORS
CPUC SCE PG&E
AEE PG&E seminars Engineered Systems (magazine) networking
AEE FEMP
Periodicals Newsletters Conferences Peers AEE
NREL IES Yahoo National Energy Labs NGO efficiency organizations
AEE Energy User News Rebuild Hawaii/America HVAC news Internet
AEE DOE Web Sites of Energy Equipment Manufacturers Professional Contacts Seminars
classes peers web shows visits to other shops
AEE Energy User News Conferences Other Trade journals Local meetings of AEE ASHRAE and IES Internet

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Question 48 Reponses Cont.

Internet Networking Periodicals Conferences Seminars
Magazines, seminars, classes, other people, books.
Professional society meetings Professional society publications
AEE Other energy managers experts in lighting media articles equipment data sheets
Magazines Seminars Professional organizations Peers Vendor websites
Trade magazines (fro profit type) Energy news Private energy related companies Peers at at technical and energy seminars Company budget
1. AAE Journal 2. Equipment manufacturer literature and sales staff 3. Local utilities 4. Energy associations 5. News media
AEE Energy User's News Utility Representatives AFE Internet
Wind Power Monthly Renewable Energy World Firm Newsletter
ASHRAE, AEE, Energy News, Internet
E Source AEE Journals and books DOE-FEMP
DOE website, POWER Magazine, EnergyTech News, Conferences
Energy User News Energy Markets REsource (Renewable Energy)Magazine A.E.E. Gas & electric marketers
Manufacturers Energy Companies Magazines Web based sources E-mail

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Question 48 Reponses Cont.

EPRI AEE Tech Magazines Tech Publications IEEE
AEE DOE Alliance to save energy Energy user news
AEE EUN ASHRAE Employer info WEB
Seminars Energy user news books
Internet AEE Networking Trade shows/seminar Trade journals
trade magazines and some training sessions
Energy User News Consulting Specifying Engineer Building Operating Management Buildings Trade Seminars
Energy Expositions Educational Seminars Internet AEE E-mail articles
AEE Meetings Utility Seminars Publications High Tech Councils Vendors
AEE, training, HPAC, IES, energy web sites
Energy User News Internet AEE EDU Conferences
EMAEE newsletter EEDO DOE iclei.org

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Question 48 Reponses Cont.

Energy Users news Megawatt daily Yahoo Energy news Fox News Bloomberg
Manufacturers Publications
-Energy user news -Energy matter -Energy engineering -Strategic planning for energy and environment
AEE Power magazine Plant Engineering Magazine Plant Services Magazine Energy ManagementHandbook
AEE Power magazine Plant Engineering Magazine Plant Services Magazine Energy ManagementHandbook
AEE Power magazine Plant Engineering Magazine Plant Services Magazine Energy ManagementHandbook
NYISO web site NYMEX web site US Energy Information Administration Energy User News Media
- Energy User News - Engineering Systems - Electric Light & Power News
internet publications professional societies
Distributors
Professional Association newsletters (AEE, AFE, ASHRAE etc) Seminars Demo's at conferences Magazine articles Flyers in the mail
AEE Publications Power Power Engineering Internet Conferences
Energy User News ASHRAE biweekly e-mail newsletter

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Question 48 Reponses Cont.

ASHRAE AEE SHARING IDEAS MAGAZINES BOOKS
Web Ashrae AEE
HPAC Engineering magazine Fuel Cell magazine Electric Perspectives magazine Power magazine AEE publications/website
several DOE websites AEE website and e-mails several industry e-newsletters
- UGI & NYSEG (Energy Suppliers) - New York State Energy Research Development Authority (NYSERDA) - AEE Publications - Energy User News (Edited for political/environmental silliness). - Consulting Engineers
1. Trade publications such as Energy User News, Engineered Systems magazine, Distributed Generation, etc. 2. On line subscriptions 3. Conferences such as EEI and AGA 4. Professional Services firms 5. Wall Street Journal
AEE Local energy providers
Energy market reports from energy providers Information from equipment vendors Trade shows Magazines Training seminars
Energy Users News Trade Publications
web conferences trades vendors
utility provider energy technology companies AEE trade publications own research
energy markets mag AEE publications energy vortex website
Internet search engines Internet Business journals Peer interaction Product Sales Demos Energy Users News

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Question 48 Reponses Cont.

AEE publications Energy Users News Energy Star Manufacturers Utility Providers and Seminars
AEE ME PUC State Gov't media internet
EIA EUN Internet THE News Buildings
1. OEM resources 2. Vendors suppliers 3. Energy consultants 4. Technology clearinghouses 5. Web search & networking (AEE)
Platts Energy Trader EIA PJM Workgroups AEE
energy conferences & expos classes emails magazines vendor calls
Association of Energy Engineers
AEE email correspondence Employer industry watch news service Customer testimonials Interaction/networking
Ino, Enerfax Daily, PowerMarketers, Energy News
Megawatt Daily EnergyCentral Professional Energy User News AEE magazines World Energy Engineering Congress
Energy User News Refocus Weekly DOE EIA Alliance to Save Energy Energy Engineering DOE Website
Energy User News Energy Markets magazine Gas Technology magazine World Wide Web Media sources
State Commission websites, Supplier newsletters, Energy User News, Energy Information Association, DOE
DOE, Cooperative Research Network, EPRI, Energy Users News, Journals
AEE

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Question 48 Reponses Cont.

ASHRAE AEE Technical articles seminars Technical shows
ASHRAE Journal ASHRAE Publications EUN AEE Energy Engineering AEE Strategic Planning
AEE DOE ASHRAE EPRI Florida Energy Center
Energy Engineering Local Utility OPPD
EnergyUserNews Shows / conventions other publications society meetings internal company discussions with other EE's
Internet AEE Energy Companies Trade Publications DOE
Energy User News Gas Technologies Electric Perspectives American Gas GTI Journal
DOE FEMP AEE ENERGY USER NEWS SDG&E
Energy User News DOE NFPA Energy Engineering
AEE Energy User News RE Focus Company Resources Internet
Energy Engineering Energy User News P&M

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Question 48 Reponses Cont.

AEE AEE AEE AEE AEE
1. My bill, 2. staff, 3. Regional and 4. Federal Regulations 5. Media
Energy User News, Energy Market, Plant Engineering, AEE Newsletters, Wall Street Journal
IEEE/PES IEEE/IAS Energy Users News Energyusers magazine Internet
1. Energy User News 2. AEE Publications 3. Energy Engineering 4. GA Power 5. Other publications
Paper TV Energy Publications Energy Groups Conversations with end users.
EPRI Conventional news media Energy Central
Energy User News Company presentations News AEE Society Meetings
utility newsletters nightly news trade magazines sales representatives internet
Co-workers Internet Publications Training Competitors and/or contactors
online newsletters from trade associations trade magazines seminars networking w/peers newspaper articles

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Question 48 Reponses Cont.

DOE Energy Star AEE AESP Web Research
1. Trade and industry forums 2. Working groups and seminars 3. Periodicals and journals 4. Word of mouth
AEE vendors/contractors journals professional orgs classes
1. energy user news 2. coworkers and referrals 3. conferences 4. internet 5. other publications and magazines
DOE AEE RMEL VENDORS PUBLICATIONS
E-Source EPRI Platts AEE
1. DOE 2. Energy User News 3. AEE 4. General Internet
AEE AEE AGA EPRI DOE BPU ASHRAE
energy user news Ino.com trade publications AEE publications
1. Internet 2. AEE 3. Trade Publications 4.
1. Internet 2. AEE 3. Trade Publications 4.
Air Force Training, AEE, Periodicals, Internet, Utilities

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Question 48 Reponses Cont.

Energy User News Email from suppliers DOE News Letter Websites on internet
1. Internet 2. AEE 3. Trade Publications 4.
ASHRAE, AEE, Energy User News
Energy Central email Energy User News Trade Publications
AEE LEEDs ASHRAE ASME DOE
Energy User News Trade Journals Utility newsletters
State Public Utility Commissions Local utility Platts Megawatt Daily Platts Gas Daily Energy Information Administration
1) Local Utility 2) State Programs 3) Federal Programs 4) Trade mag. 5) Equipment Vendor Support
ae magazines and literatures
seminars and training
Seminars Magazines Vendors
AEE ASHRAE IGSHPA Energy User News Engineered Systems
EUN energy matters Buildings
Energy Users News AEE DOE Internet
Web, Utility, trade papers, trade shows trade organizations

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Question 48 Reponses Cont.

Energy Central Daily Energy User News Energy Engineering Strategic Planning for Energy and the Environment ASHRAE Journal
Web ASHRAE Projects Reports 1:1 Communicating with others not nec. in order
1. AEE 2. EUN
Trade shows Magazines
AEE Trade shows
trade publications national news AEE-publications seminars trade shows
magazines internet AEE people in the industry
CT DPUC FERC Trade Journals IEEE NASA BRIEFS
AEE Power Engineering ASM Electric Light & Power Energy Pluse
1. Energy User News 2. Energy Engineering 3. Strategic Planning for Energy & the Environment 4. Buildings 5. Lakeshore Consulting
AEE, IEEE, EC&M, Wall Street Journal, UVA Library
Electrical Engineering consultant AEE Internet
Gas Daily Utility Fortnitly AEE Mainstream news customers

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Question 48 Reponses Cont.

Energy User News Local AEE Meetings Other trade magazines Consultant WEEC
Energy User News ESource AEE Programs New Technologies Group at our Utility
1. Periodicals 2. AEE 3. Colleagues 4. Seminars/conferences 5. Job experience
PUC State Energy Commission Local utility company DOE Internet
AEE Web Site, WEEC each year EUN- Energy User's News AEE Publications, Energy Engr, Strategic Planning for Energy Johnson Controls (controls supplier) ASHRAE Journal, other periodicals
Not really active in receiving new energy information. I do read Energy User News. I am more on the project development. The energy info I use is typically from the local utility companies.
trade websites conferences trade journals fellow energy colleagues energy marketers/brokers
Energy Users, Wall Street Journal, Business Week, local papers, AEE
The Internet. The US DOE Colleagues (word of mouth) Energy Users News Energy Engineering
Energy User News Internet Energy Engineering Strategic Planning for Energy and the Environment Vendors
Energy User News Internet Energy Engineering Strategic Planning for Energy and the Environment Vendors
AEE Air Force Civil Engineering Support Agency Consultants Utility companies Other Contacts developed over the years
Energy User News AEE conferences, seminars

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Question 48 Reponses Cont.

Web
Utility
FEMP
Ashrae
Resource
AEE,IESNA,LRC,E-Source,BOMA
Engineering periodicals
Trade shows
Platts Gas Daily
Platts Coal Outlook
Platts Coal Daily
EIA web site
Goldman-Sachs
ASHRAE
AEE
ASME
FACILITY PERIODICALS
UTILITY SUPPLIERS
AEE
Websites
Utility Newsletter
Trade magazines
Newspapers/Television
Energy User News
Local utility
State OPM
Us DOE
Johnson Controls
Cooperative Research Network
EPRI
AEE
IEEE
Conferences
EC&M
AEE
Energy User News
Utilities
Venders
Energy User News
Esource
AEE
AFE
other publications and the internet
Measuring our power usage in critical areas.
Energy User News
AEE Publications & e-mails
Energy Central
Trade Journals
Web based communications

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Question 48 Reponses Cont.

AEE IFMA BOMA Engineering Record WSJ
Professional development Publications Conferences/trainings Peer interaction/networking Daily work -- walking the talk
AEE IES Energy User News Energy Marketing Electrical Whse
Energy User News AZ State Energy Office AEE trade information
AEE ASHRAE VARIOUS MAG. SEMINARS WORLD TRAVEL
EPRI IEEE AEE PJM PSEG
trade publications vendor data general news professional contacts advertising
AEE Journals Energy User News Energy Markets Magazine Newspaper TV
IDEA, AEE, ASHRAE, PROFESSIONAL ORGANIZATIONS
Internet Magazine Subscriptions DOE Conferences/trade shows Energy seminars
AEE, CEC, SDG&E, ASHRAE, Newspaper
Energy Users News US DOE EIA state energy offices email/internet
FEMP Energy User News

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Question 48 Reponses Cont.

Internet Energy engineering journals Diesel gas turbine
Personal Network of Associates Internet Vendors Technical Magazines Trade Shows
WEEC EUN colleagues
Utilities Reps. Journals internet word of mouth seminars
Internet Seminars/Meetings Trade Publications Vendors Organizations/Programs (EEI, Energy Star)
FEMP publications Energy User News Energy Engineering Journal Strategic Planning for Energy and the Environment Journal Industry Magazine publication
FEMP publications Energy User News Energy Engineering Journal Strategic Planning for Energy and the Environment Journal Industry Magazine publication
FEMP publications Energy User News Energy Engineering Journal Strategic Planning for Energy and the Environment Journal Industry Magazine publication
Periodicals Industry Meetings Internet Resources Government
Local utility AEE/local chapter AEE Private consultants
ASHRE Consulting and Specifying Engineer EUn
gas daily nymmex unergy users news
internet vendors periodicals

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Question 48 Reponses Cont.

1.AEE 2.Local Utility 3.Seminars 4.EUN 5.Internet
IESNA LEED Conference attendance trade publications/web access local meetings
Trade magazines Professional Association programs & meetings Internet Business publications
Energy User News Energy Engineering Energy Design Update ASHRAE Journal
Energy Users News Website AutomatedBuildings.com Various Equipment Manufacturers DOE Websites Other Internet Websites
AEE American Gas Energy Engineering Energy News
internet newspapers trade newsletters associates
Internal best practices AEE Energy periodicals
Education seminars Trade Journals Internet Current book publications Networking
Colleagues, AEE, ASHREA, Vendors, Web
ENERGY STAR EREN Energy User News Buildings Operations Management Mag Platts Research Internet

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Question 48 Reponses Cont.

FEMP Websites AEE refresher courses National Guard Bureau sponsored training WEEC in Atlanta
Internet!
Industry Connections. Literature Paid websites
FEMP; E-Source; Utility providers; Energy Service Provider
Professional Publications Vendors Colleagues
AEE publications DOE CEC
AEE Energy User News ASHRAE Internet Search
IEEE AEE Energy Ideas Clearinghouse Energy User News

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Question 49 Responses
AEE
seminars
Utility Company
local energy membership
Internet
AEE
Technical Publications
SDREO
AEE
ALL
AEE
Inside FERC's Gas Market Report
Involvement in professional societies
ASHRAE
AEE
The sun
Magazine Articles
Web
Ashrae
all
AEE
Gas Supplier
aee
Colleagues
SCIENTIFIC AMERICAN
Magazines
Home Power
Seattle City Light
CBIA
UTILITIES
AEE
PG&E
FEMP
All the above
NREL
NGO
National Labs
Internet
AEE
peers
You have not provided space for making comment on AEE. You are becoming and organization which is emitting the smell of capitalism that being an educational entity. Please observe where you are going....
Your policies do not allow the worthy engi
EUN
Internet
They are in order of importance
Magazines, seminars
Professional society publications
AEE

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Question 49 Responses Cont.

Magazines
Websites
Peers at technical and energy seminars
Equipment manufacturer literature and sales staff
All are important
DOE-FEMP
Power Magazine
Energy User News
Manufacturers
Tech Proublications
AEE
AEE
seminars
Internet
trade magazines by far
Energy User News
Trade Seminars
Energy Shows
AEE Meetings
Utility Seminars
AEE
Conferences
EMAEE newsletter
DOE
Bloomberg
Manufacturers
-Energy engineering
Plant Services Magazine
Plant Services Magazine
Plant Services Magazine
Commodity Market websites
Energy User News
internet
Professional Assoc. Newsletters
Conferences
Both equally
ASHRAE
AEE
Web
AEE publications/website
DOE websites
Consulting Engineers
on line subscriptions. Usually the most up to date
AEE
Information from equipment vendors
Trade Publications
web
energy technology companies
AEE publications
Internet
Energy Users News

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Question 49 Responses Cont.

AEE publications
Energy Users News
Energy Star
Manufacturers
Utility Providers and Seminars
internet
Internet
Technological clearinghouses & web search/networking as well as consultants.
Platta Energy trader
contacts established at conferences
classes
Employer industry watch news service
Enerfax daily
EnergyCentral Professional
Energy User News
World Wide Web
EIA
All
AEE
Technical articles
ASHRAE
AEE
Energy Engineering
Internal company resources
AEE
Energy User News
EUN
Energy engineering
Company Resources
Energy Engineering
AEE
1. My bill
Energy Market magazine
IEEE/PES
Energyusers magazine
Energy Engineering
Talking with end user.
Conventional news media
Society Meetings
nightly news
Co-workers
trade magazines
All
Trade and industry forums
AEE
prof orgs
referrals
AEE
RMEL
PUBLICATIONS
E-Source
AEE, because it combines news with training and continuing education and political activism.
none

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Question 49 Responses Cont.

AEE publications
Internet
Internet
AEE
Email from suppliers
Internet
ASHRAE
Energy User News
ASHRAE
Energy User News
Trade publications such as Megawatt Daily or Gas Daily
Local Utility because they have an unbiased opinion
seminars and training
Seminars & Vendors
AEE
all have good issues
EUN
trade organizations.
Energy Central Daily
ASHRAE
1. AEE
Trade Shows
trade publications
internet
Trade Journals
AEE
Lakeshore Consulting
Energy Engineering
AEE
Electrical Engineer
Customers
Consultant
ESource
5
Internet
AEE and EUN sources first
Rates used in savings calculations -- the higher the rate, the more opportunity for retrofits.
monthly email updates from trade
Energy Users
The Internet
Energy User News
Energy User News
Air Force Civil Engineering Support Agency
AEE conferences, seminars
Utility
All of the above
AEE
EIA
AEE
AEE
State OPM
collaborative research funding for specific technologies

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Question 49 Responses Cont.

AEE
AEE networking
Energy User News
AEE
Daily work
Energy User News
AZ State Energy Office
SEMINARS WEB BASED
PSEG
professional contacts
Energy User News
AEE & ASHRAE
Internet
AEE
US DOE
FEMP
internet
Personal Network of Associates
Colleagues
Utility Reps.
Internet
Energy User News
Energy User News
Energy User News
Government
The local utility and the local AEE chapter because they have a better grip on what is available, if it is being used locally and the results.
ASHRE
periodicals
AEE
trade publications / web access
trade
They are all important.
AEE
newsletters
Internal best practices
Education seminars
My colleagues
Platts Research
Internet
National Guard training
Industry connections.
Energy Service Provider
Professional Publications
AEE
Energy User News
Energy Ideas Clearinghouse

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