



Momentum Savings

**Monthly
Update**

June 29, 2016

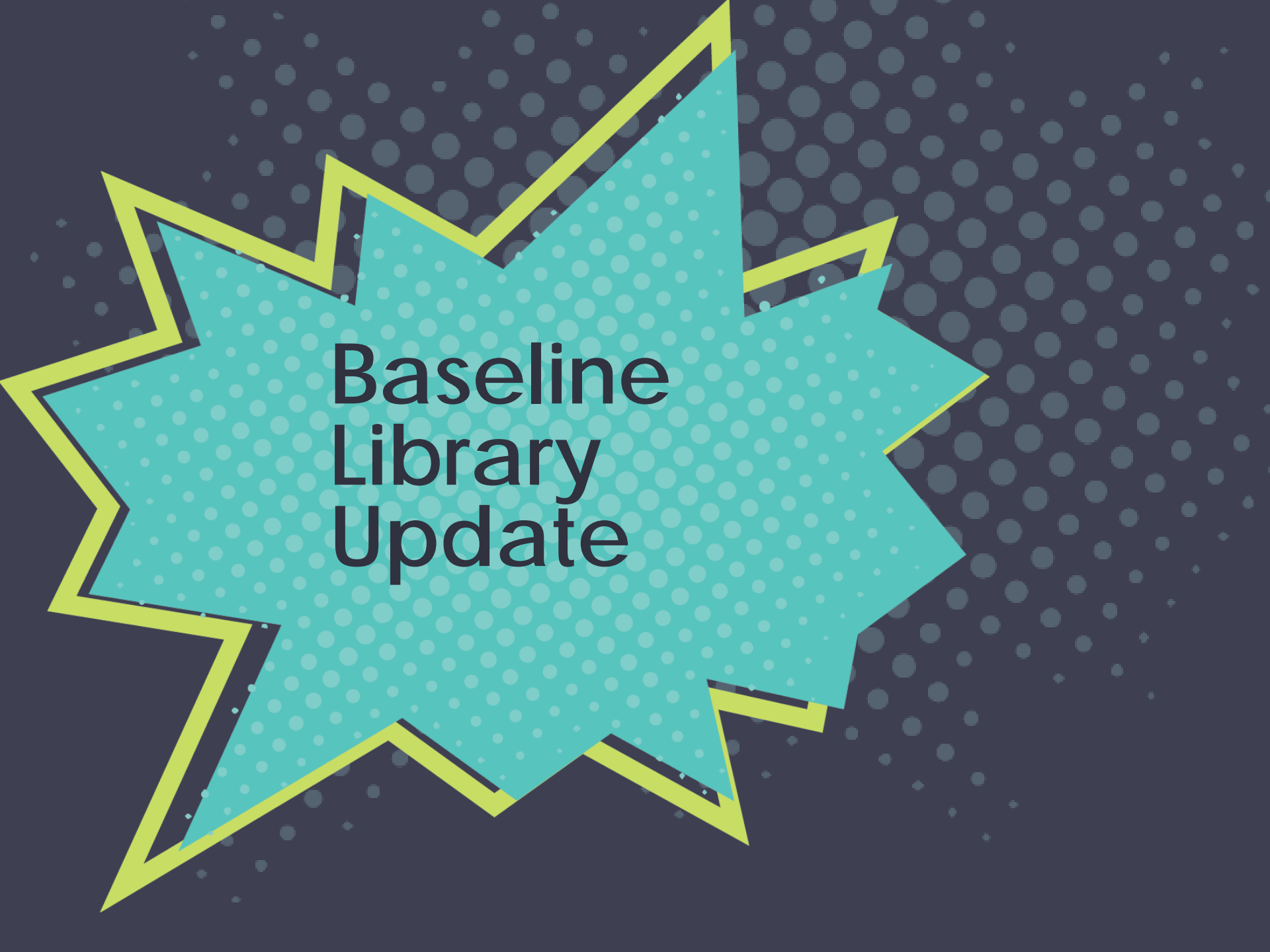
Baseline alignment meeting
debrief, next steps

Residential and non-res
lighting studies update

Upcoming studies
for 2017



Agenda



**Baseline
Library
Update**

Update on June 8th Technical Workshop

- **Technical workshop complete:** BPA held a technical workshop with CPA consultants, NEEA and Council staff on June 8th
- **Attendees:** Good participation and representation from EES, Cadmus, AEG, Navigant, Utility Consulting, Council Staff, and NEEA Staff
- **Objectives:**
 - Focus was on understanding the differences in approaches in technical CPA modeling between organizations
 - Got feedback on how an agreed upon efficiency mix in the baseline might impact implementation of CPAs

Key Takeaways

- **No technical issues to creating a baseline library**
 - Alignment from CPA consultants on most approaches
 - Good communication/understand of how baselines are treated
 - No red flags for moving forward
- **Still work to do**
 - Researching how non-res lighting baselines are treated
 - Primarily a policy decision now

Second Meeting: Process and Next Steps

- **Save the Date: August 18th 9am-12pm, BPA Room 122 (and WebEx)**
- **Objectives:**
 - Summarize key takeaways from technical workshop
 - Discuss the process—when, how and other logistics for managing the process to roll out a regional baseline library
 - Present and discuss options for consideration on how to move forward
- **Desired Outcome:** We gather feedback from the region on how to move forward with developing a regional baseline library
- **Desired Attendees:** Utility staff who manage CPAs, Council staff, NEEA planning staff, other interested stakeholders

What You Can Do

1. Come to the meeting on August 18th
2. Help us get the word out about this meeting to the right people
3. Stay tuned for a brief survey to help us understand everyone's CPA timing

Webpage: <http://www.bpa.gov/goto/BaselineLibrary>

Contact: Bonnie Watson bfwatson@bpa.gov



*Lighting Study
Updates*

TWO LIGHTING STUDIES

RES

NON-RES

GOALS

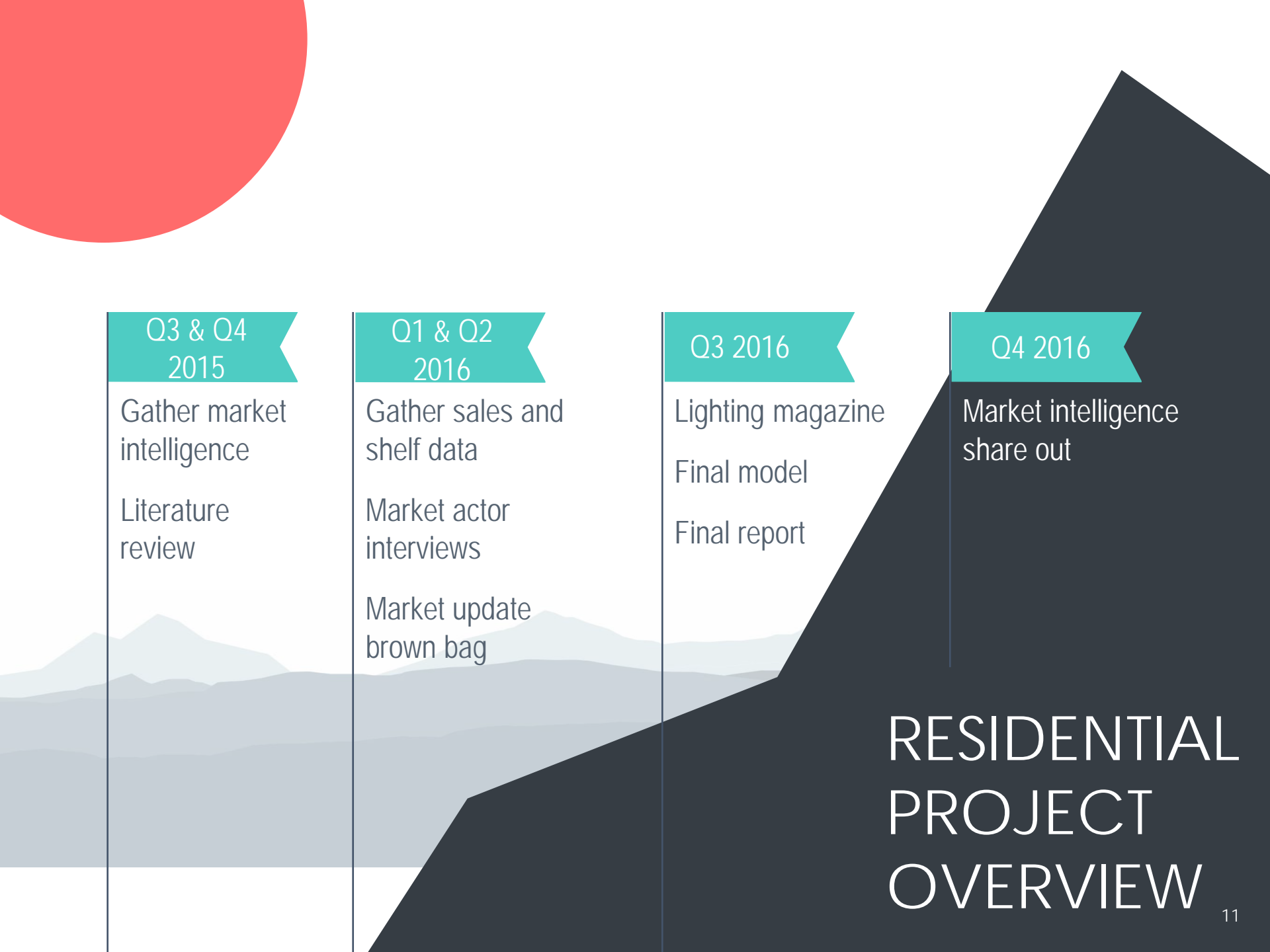


Determine stock and flow

Understand the market

Estimate momentum savings

Share research and provide market intelligence to programs



Q3 & Q4
2015

Gather market
intelligence

Literature
review

Q1 & Q2
2016

Gather sales and
shelf data

Market actor
interviews

Market update
brown bag

Q3 2016

Lighting magazine

Final model

Final report

Q4 2016

Market intelligence
share out

RESIDENTIAL PROJECT OVERVIEW

WHAT'S NEXT?

August: Distribute lighting magazine

August/September:
Share draft results
Review model with RTF
subcommittee

October:
Share final results



Q4 2015

Begin sales data collection
distributor outreach

Develop interview strategy

Q1 & Q2 2016

Collect sales data

Market actor interviews

Literature review

Q3 2016

Market actor interview findings

Efficiency share results

Draft model

Q4 2016

Final model

Final report

Market intelligence share out

NON-RESIDENTIAL PROJECT OVERVIEW

DISTRIBUTOR DATA COLLECTION

27

More submissions than
ever!

WHAT'S NEXT?

August-September:
Share market actor
findings

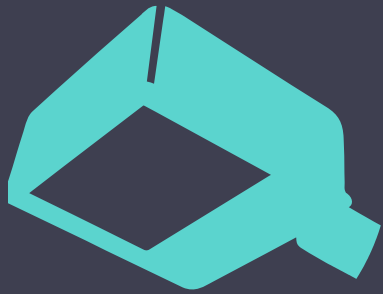
Share efficiency shares
Review model with RTF
subcommittee

October:
Share final results



**Upcoming Studies
for 2017**

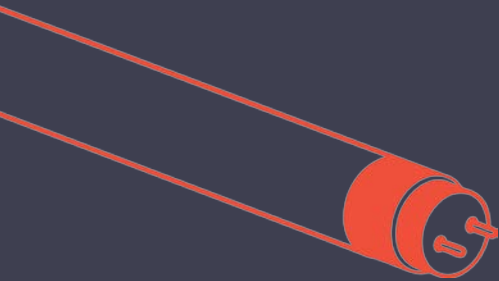
Outdoor Lighting Stock Assessment (OLSA)



- Background:
 - 17% of lighting sales are outdoor
 - Need to understand this market segment better
- Goals: determine the lighting stock for all outdoor lights in the region, similar to the RBSA and CBSA
- Conducted in two phases:
 - Phase 1: define the market, determine sampling and data collection strategy
 - Phase 2: field work/data collection
- Kicking off winter 2016

Non-Residential Lighting

- Background:
 - Currently studying this market
 - Rapidly changing market with large potential for savings
- Goals:
 - Update the existing model with 2016 sales data
 - Continue to leverage regional connections with distributors
 - Gather market intelligence:
 - Market actor interviews
 - Light Fair
- Kicking off winter 2016

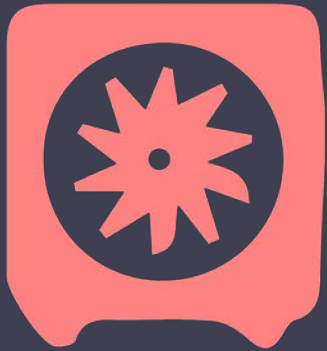




Residential Lighting

Background:

- Currently studying this market
- Rapidly changing market with large potential for savings
- Goals:
 - Update the existing model with 2016 sales data
 - Utilize Nielsen and shelf survey data
 - Energy Star Partners meeting and interviews
- NEEA will be managing this study moving forward
 - BPA will provide support and conduct additional research as needed



HVAC

- Background:
 - Recently completed study of this market
 - Discovered that installation context is often undocumented, but a key component of savings
- Goals:
 - Fill gaps on installation context identified from previous work
 - Updating the existing model with 2016 sales data and results from installation study
 - Market intelligence research
- Coordinating with NEEA on distributor sales data
- Kicking off winter of 2016



Commissioning Controls and Sizing

- Background:
 - Box efficiency and CC&S are two components of savings
 - CC&S represents a large portion of measure savings
 - RTF measure is expiring
- Goals:
 - Current practice baseline study for the residential market
 - Develop a research approach
- Study underway
 - Draft research approach by end of the year



National and Regional Accounts

- Background:
 - Learned from research that national accounts make up a large portion of lighting sales
 - Decision making process is different for these customers
 - Sales may bypass traditional supply chain
- Goals:
 - Better understand national account supply chain and decision making process
 - Focus on HVAC and non-res lighting
 - Conducting interviews with national account reps, ESCOs, distributors, etc.
- Kicking off fall 2016



Federal Appliance Standards

- Background:
 - DOE very active in recent rulemaking cycles
 - Largest standard ever passed for commercial HVAC
 - Standards contribute to momentum savings
 - Standards are a key component of baseline
- Goals:
 - Develop models for federal appliance standards
 - Includes residential and non-residential standards
- Working closely with NEEA
- Kicking off fall 2016, rolling schedule

*Double counting
brown bag*

HVAC Report

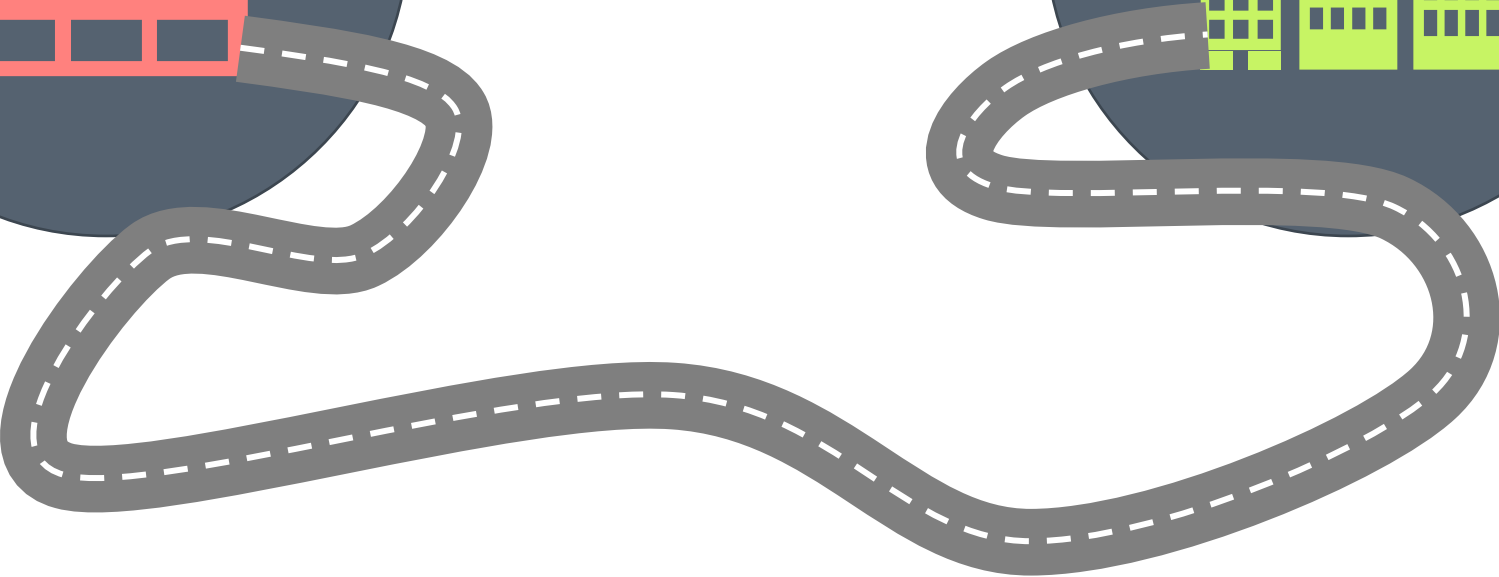
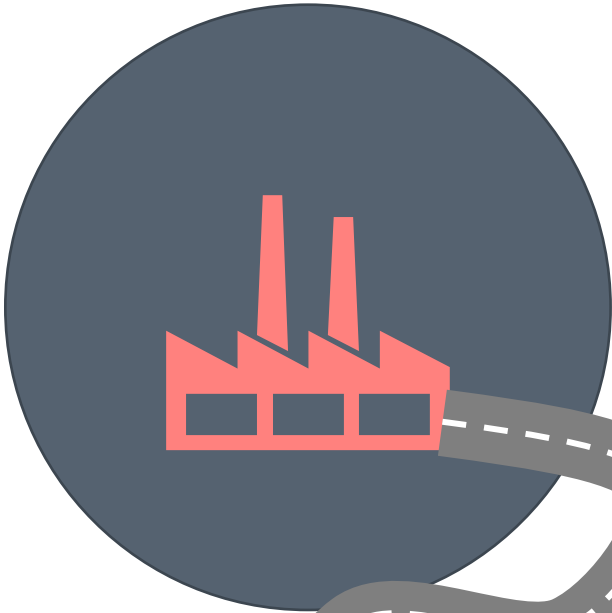


***What's New
& Upcoming***

LIGHTING MARKET INTELLIGENCE UPDATE

From manufacturer to end-user





ALONG THE JOURNEY



Manufacturers



Distributors



Manufacturer
Representatives

ALONG THE JOURNEY



Electrical Contractors



Programs



End-users

THE LAMP'S JOURNEY IS ALWAYS EVOLVING



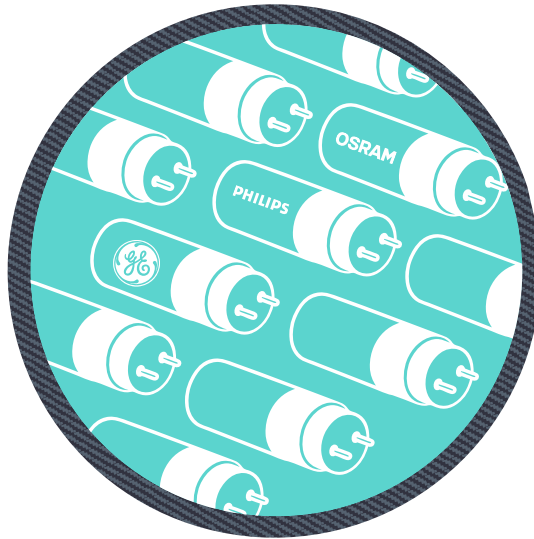
THE ERA OF NEW PLAYERS IS SLOWING

"I've been in this industry 35 years. I've never heard of any of these companies."

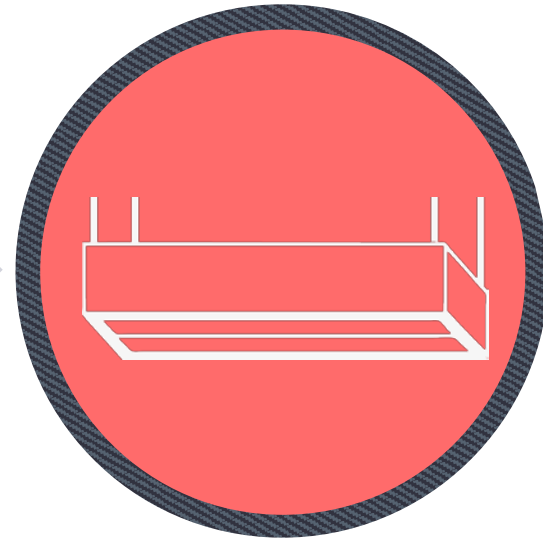
- Manufacturer at Lightfair 2015



EVOLVING VALUE CHAIN



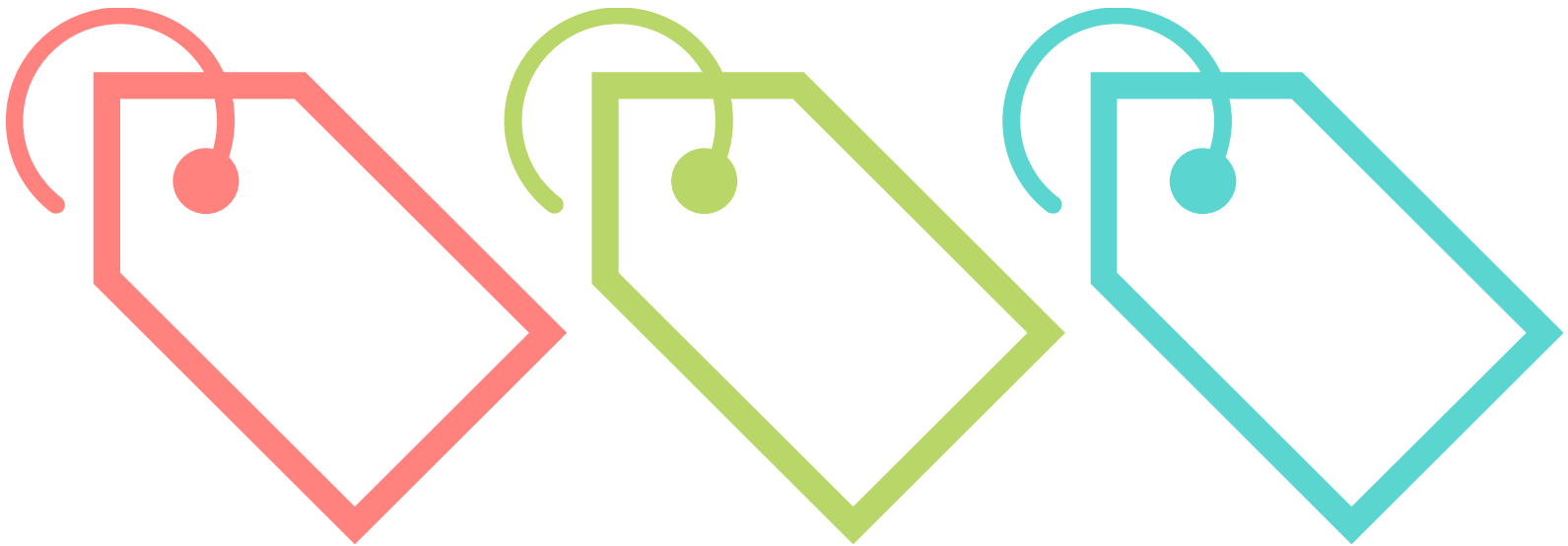
Lamp Manufacturers



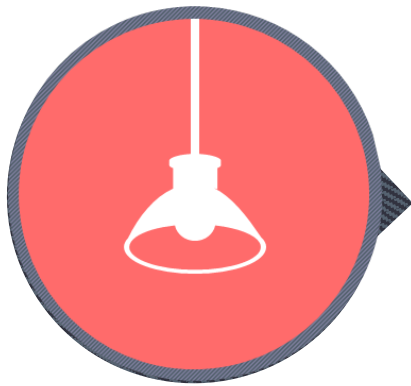
Fixture Manufacturers



NEW PRODUCTS



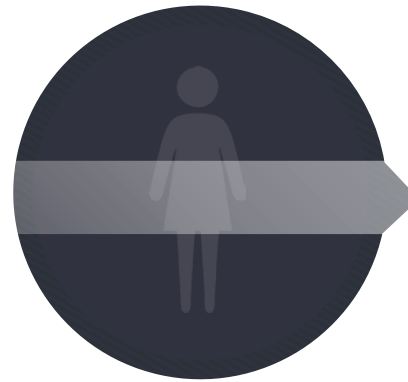
DIRECT SALES TO LARGE ACCOUNTS



Manufacturers



Distributors



Retailers

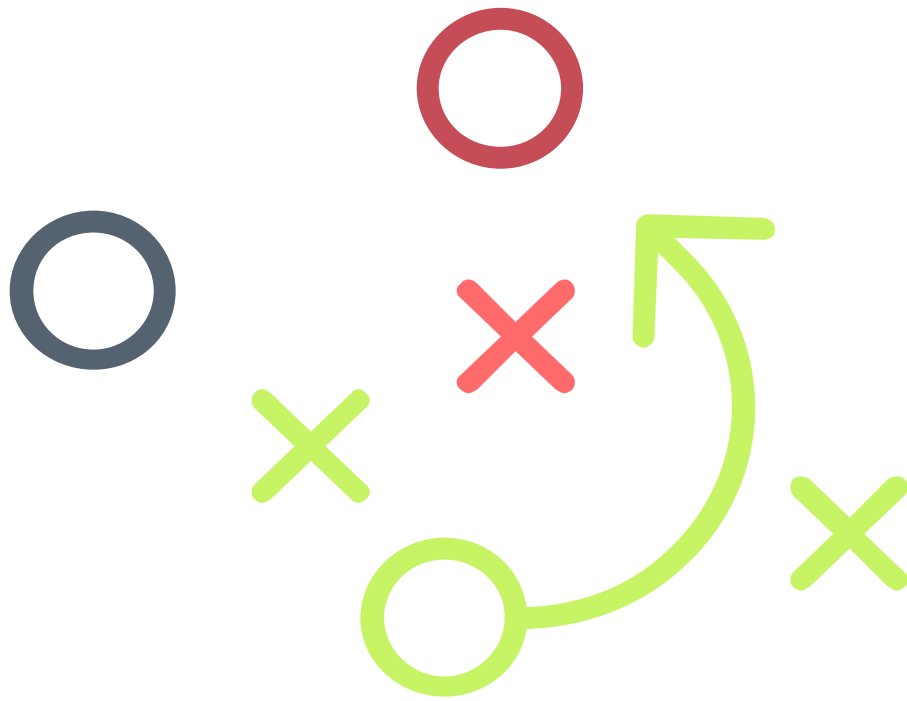


End-Users



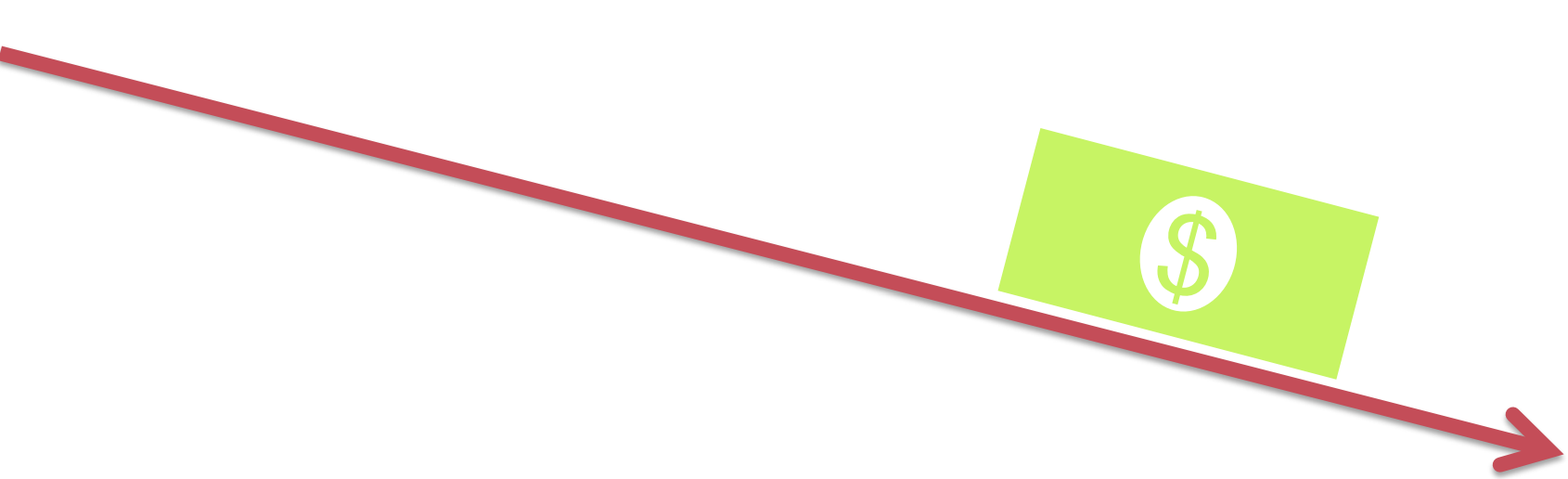
ONLINE SALES
GROWING





NECESSITY LEADING
TO SOPHISTICATED
SALES STRATEGIES



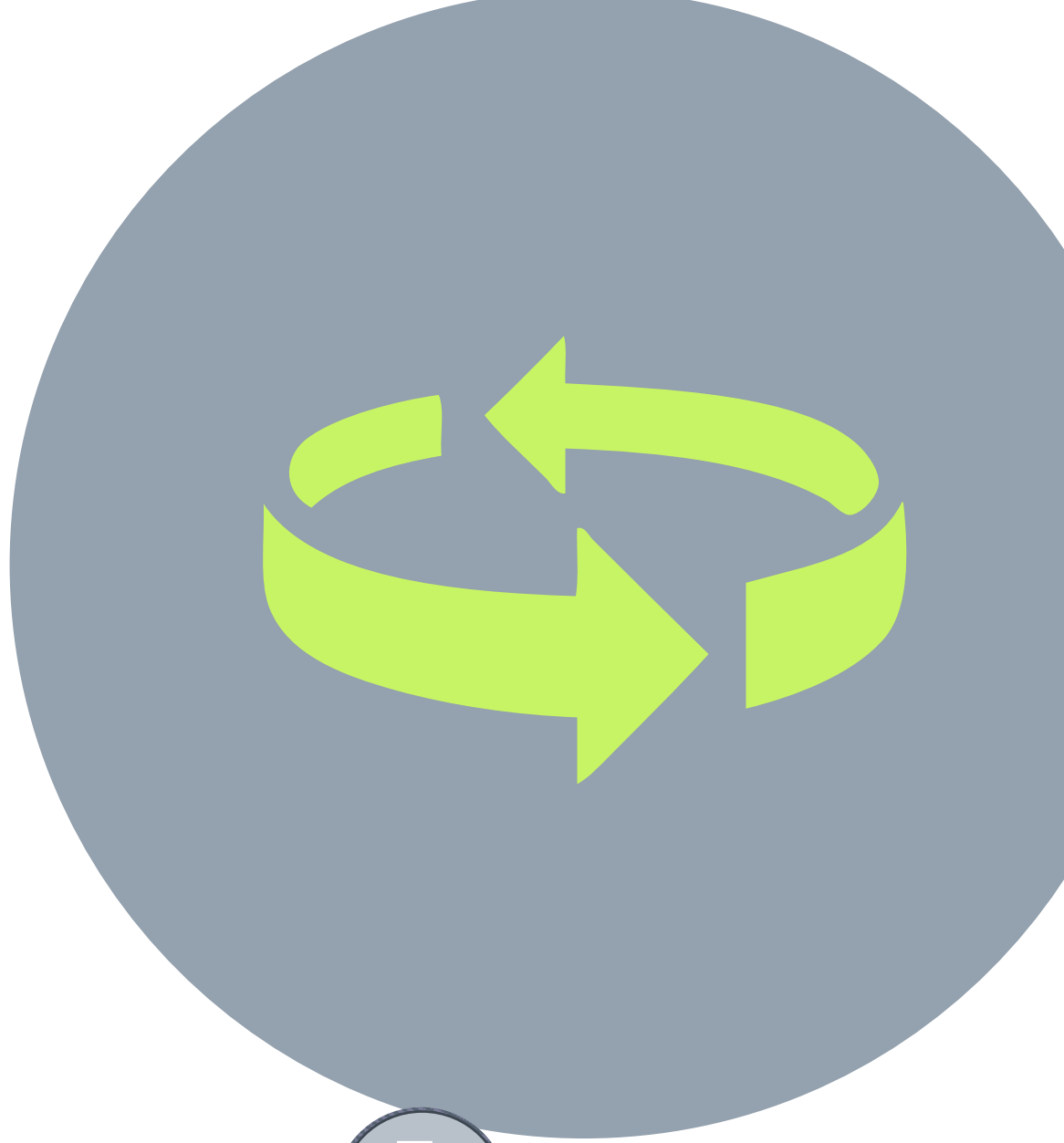


ILLUMAGEDDON

THE FUTURE DECLINE IN MAINTENANCE SALES



END-OF-LIFE
NOT THE
PRIMARY
DRIVER OF
FUTURE
RETROFITS



Questions + Discussion



**Next Meeting:
July 27th, 9am**