AGENDA – April 5st

Sales Data
CBSA Update
National Accounts

ETHAN

MANTHEY

HELLO
my name is

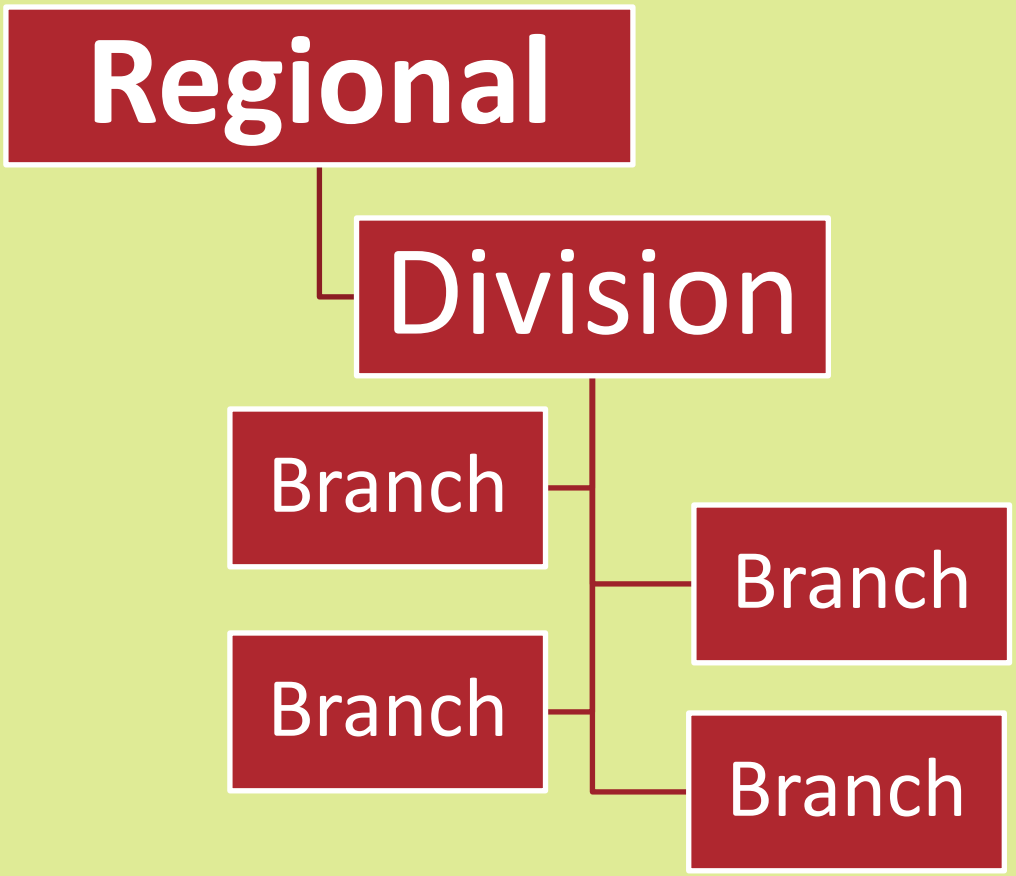
ETHAN

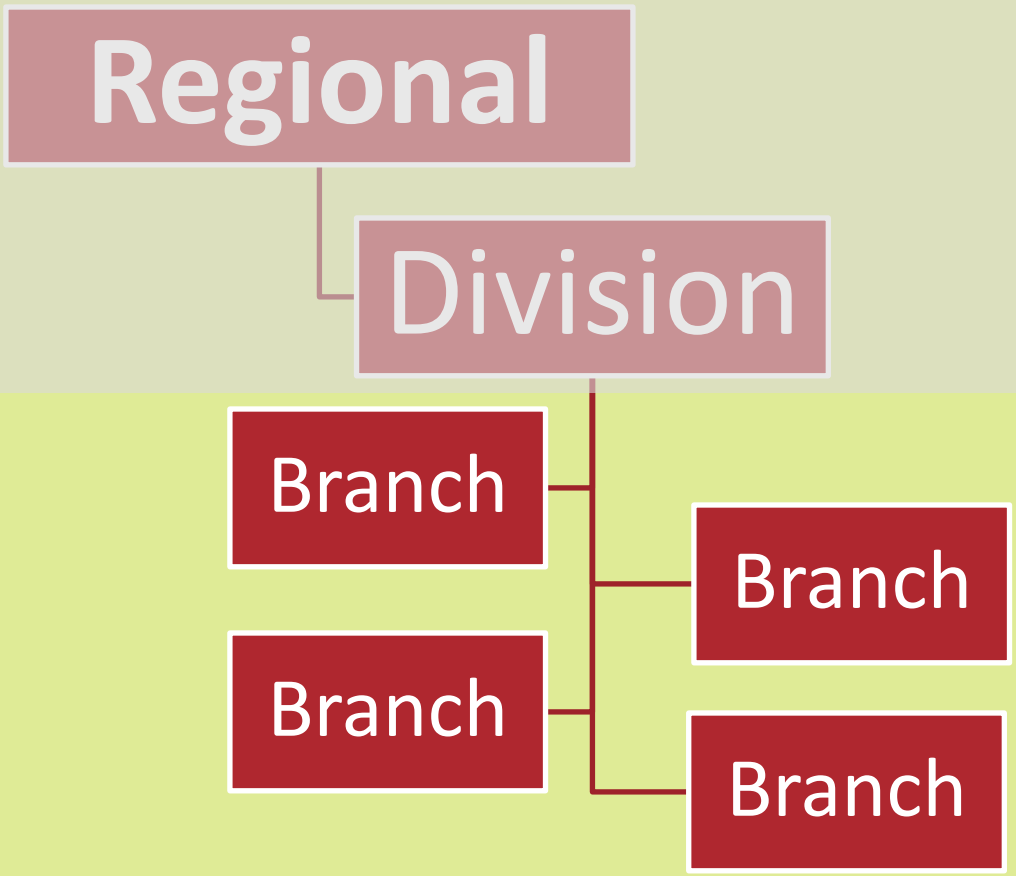
MANTHEY

SALES DATA

HVAC

Lighting


Regional
Division
Branch
Branch
Branch
Branch


Regional
Division
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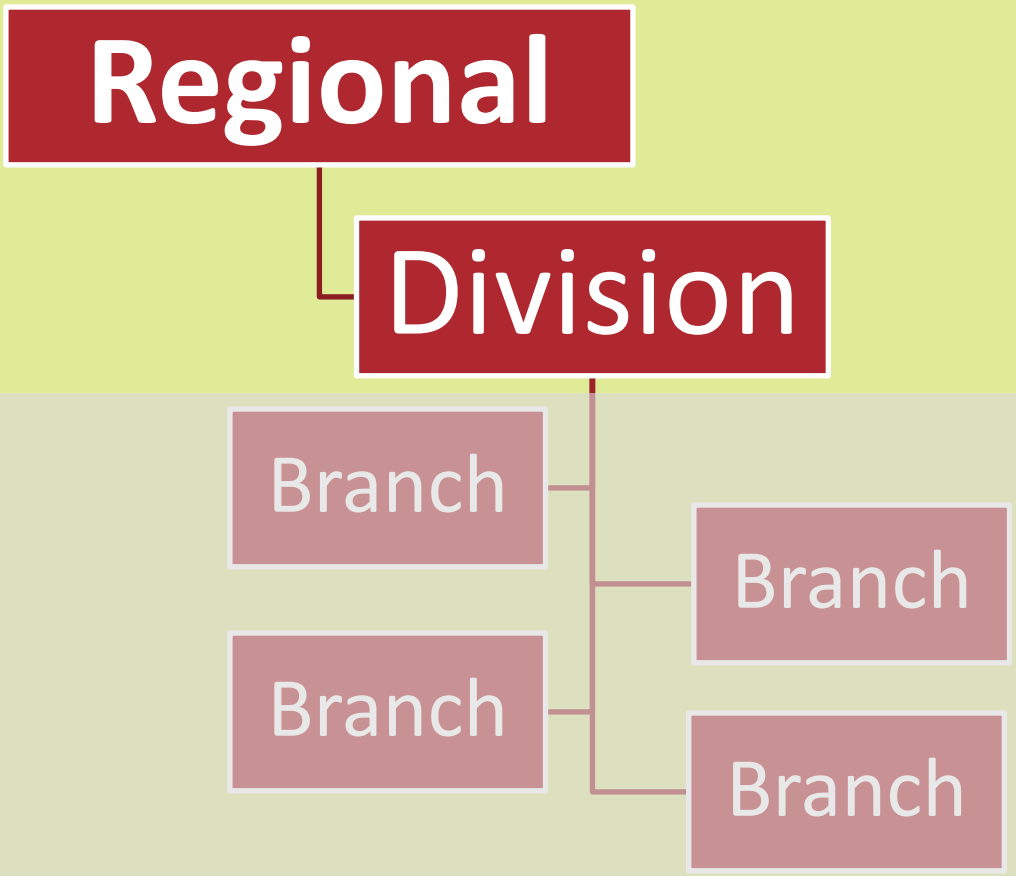
Regional
Division
Branch
Branch
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Branch

Qs?

Dulane Moran

NEEA

2017-19 CBSA Status Update

Dulane Moran

April 5, 2017

CBSA: Context

- Regional baseline stock study
  - Informs efficiency planning, market models, and provides inputs into load forecasts
- Regionally representative study + optional oversamples
- Multi-year, extensive data collection

Timeline: Phased Project

Phase I
Q4 2016 - August 2017

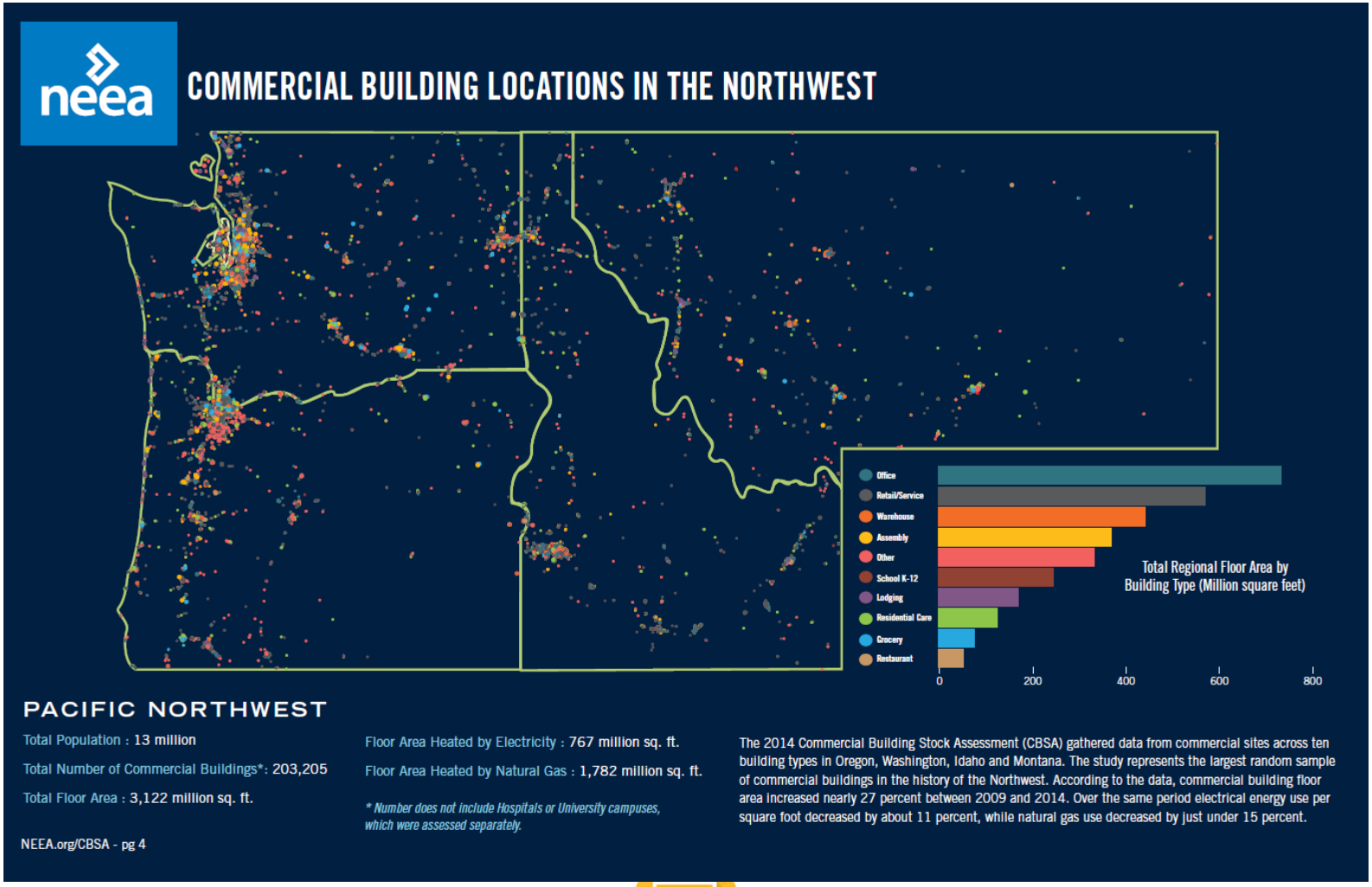
Phase II
August 2017 – December 2019

COMMERCIAL BUILDING
STOCK ASSESSMENT

Regional Involvement

- Workgroups focused on sample design and building variables
- All resources and input tools available on Conduit:
- https://conduitnw.org/Pages/Article.aspx?rid=1199

Questions?


neea
COMMERCIAL BUILDING LOCATIONS IN THE NORTHWEST
Office
Retail/Service
Warehouse
Assembly
Other
School K-12
Lodging
Residential Care
Grocery
Restaurant
0
200
400
600
800
Total Regional Floor Area by Building Type (Million square feet)
PACIFIC NORTHWEST
Total Population : 13 million
Total Number of Commercial Buildings*: 203,205
Total Floor Area : 3,122 million sq. ft.
Floor Area Heated by Electricity : 767 million sq. ft.
Floor Area Heated by Natural Gas : 1,782 million sq. ft.
* Number does not include Hospitals or University campuses, which were assessed separately.
The 2014 Commercial Building Stock Assessment (CBSA) gathered data from commercial sites across ten building types in Oregon, Washington, Idaho and Montana. The study represents the largest random sample of commercial buildings in the history of the Northwest. According to the data, commercial building floor area increased nearly 27 percent between 2009 and 2014. Over the same period electrical energy use per square foot decreased by about 11 percent, while natural gas use decreased by just under 15 percent.
NEEA.org/CBSA - pg 4

BONNIE

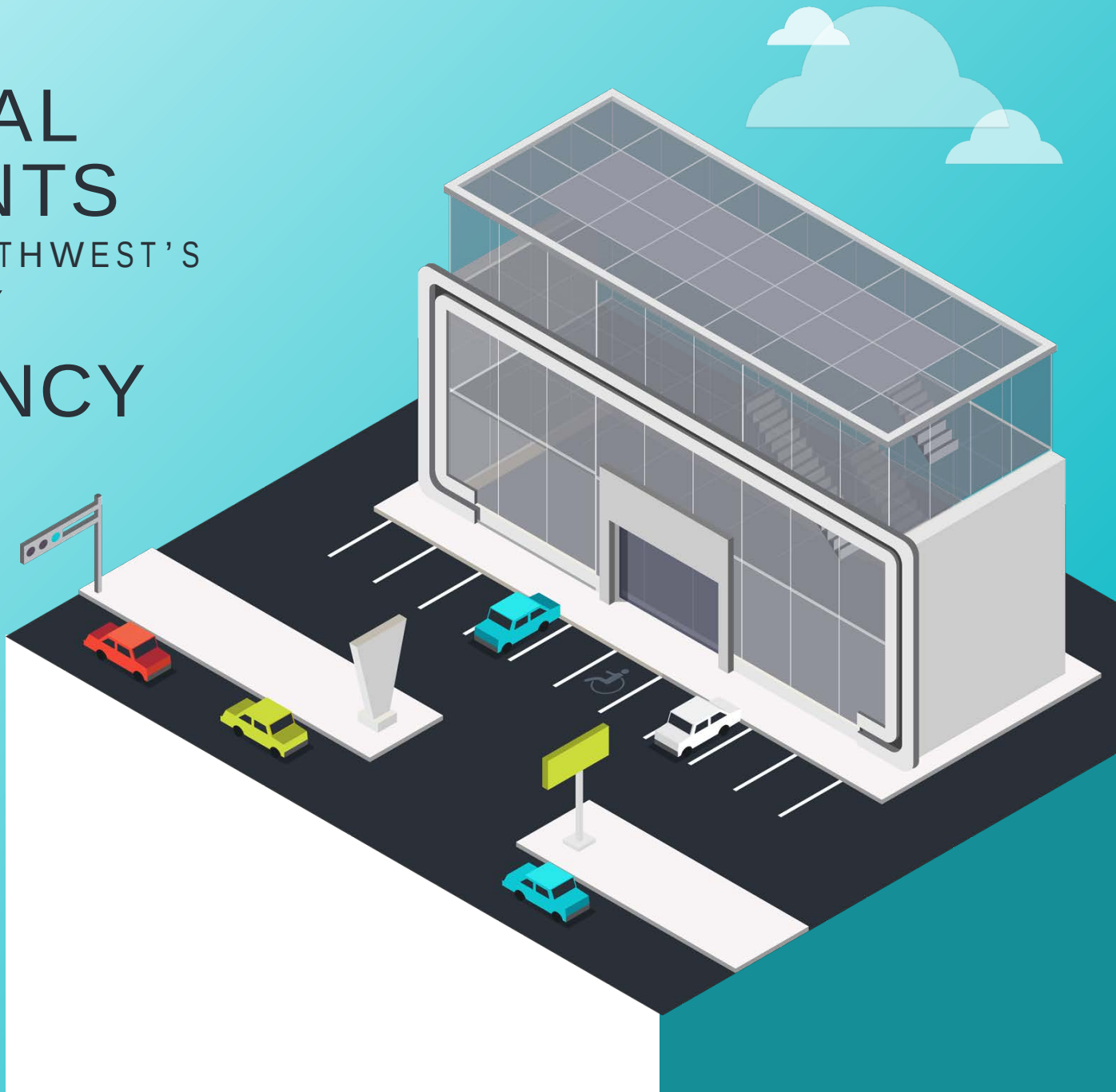
WATSON

MAKING

NATIONAL ACCOUNTS

INTO THE NORTHWEST'S

ENERGY EFFICIENCY ALLIES

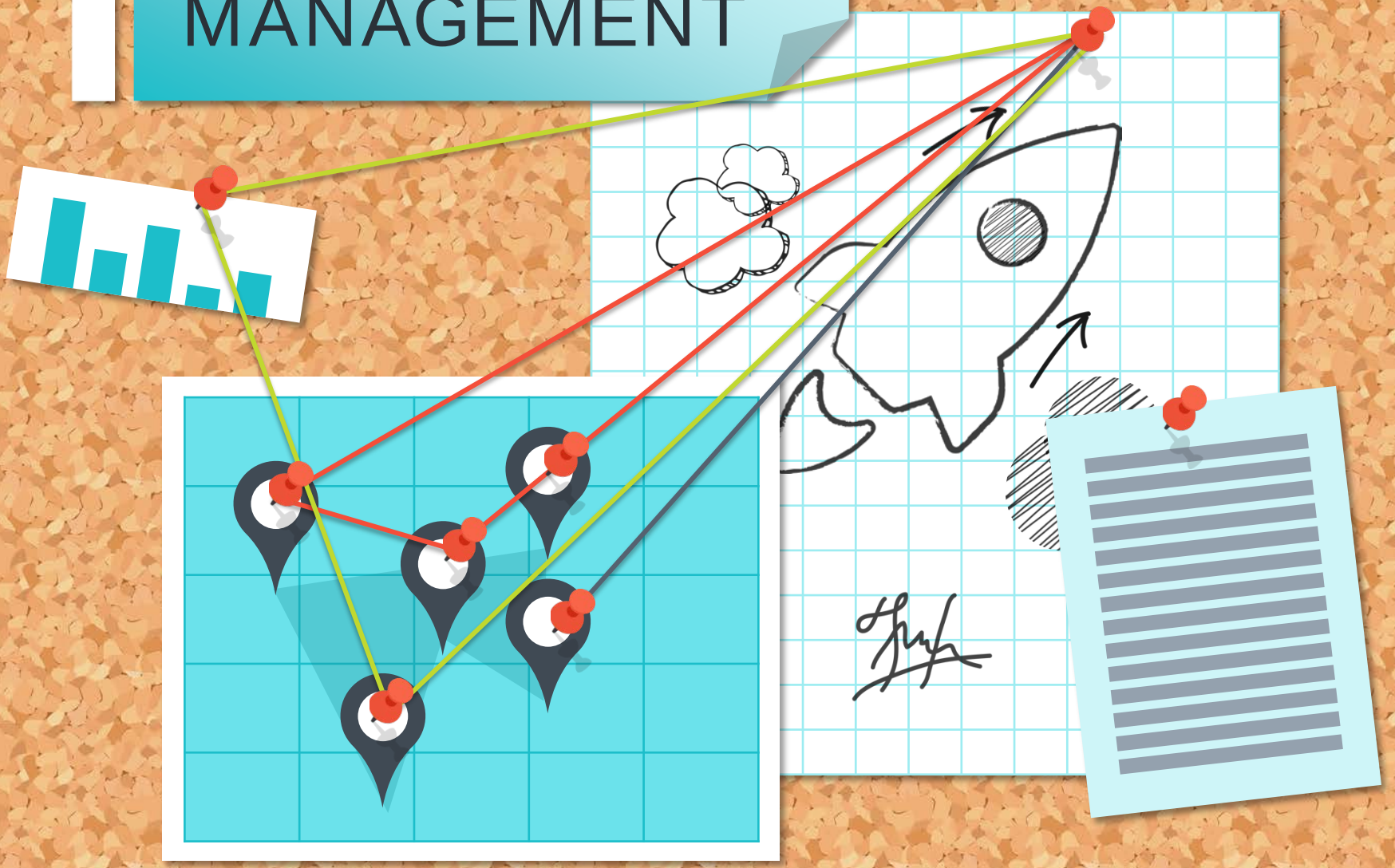


Bonneville
POWER ADMINISTRATION

NATIONAL ACCOUNT CUSTOMERS

NATIONAL
ACCOUNTS ARE
DIFFERENT
FROM OTHER BUSINESSES

1 SOPHISTICATED MANAGEMENT



2

PURCHASING POWER

3

EARLY ADOPTERS

4 MANY INFLUENCERS AND DECISION MAKERS

Equipment Mfg & Sales

Energy-Efficiency Strategy & Project Mgmt

Specification & Design

Distribution & Logistics

Project Implementation

Rebate Administration

5

COMPLEX DECISION-MAKING PROCESS

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Roll-out
Prioritization

Implementation

COMPLEX DECISION-MAKING PROCESS

Project Initiation

Executive Approval

Roll-out Prioritization

Implementation

COMPLEX DECISION-MAKING PROCESS

Project Initiation

Executive Approval

Roll-out Prioritization

Implementation

COMPLEX DECISION-MAKING PROCESS

Project Initiation

Executive Approval

Roll-out Prioritization

Implementation

COMPLEX DECISION-MAKING PROCESS

Project Initiation

Executive Approval

Roll-out Prioritization

Implementation

6

SPECIALIZED SUPPLY CHAIN

Sp
Distr

stallation
Firms

Turnkey
Providers

SPECIALIZED SUPPLY CHAIN

Specialized Distributors

Installation Firms

Turnkey Providers

SPECIALIZED SUPPLY CHAIN

Specialized Distributors

Installation Firms

Turnkey Providers

SPECIALIZED SUPPLY CHAIN

Specialized Distributors

Installation Firms

Turnkey Providers

HOW DO UTILITY PROGRAMS

FIT INTO THIS WORLD?

UTILITY PROGRAMS

AFFECT ROLL-OUTS

NATIONAL ACCOUNTS
WANT SOME

IMPROVEMENTS

WHAT'S THE GOAL?

HOW CAN WE PUSH ENERGY EFFICIENCY?

Push

Creating energy efficiency where it wasn’t there before

STRATEGY ONE

Tipping
the scales to favor the Northwest

STRATEGY TWO

Finding

the hard-to-reach pockets

STRATEGY THREE

Using
national accounts
to help shape
the future

CONTACT

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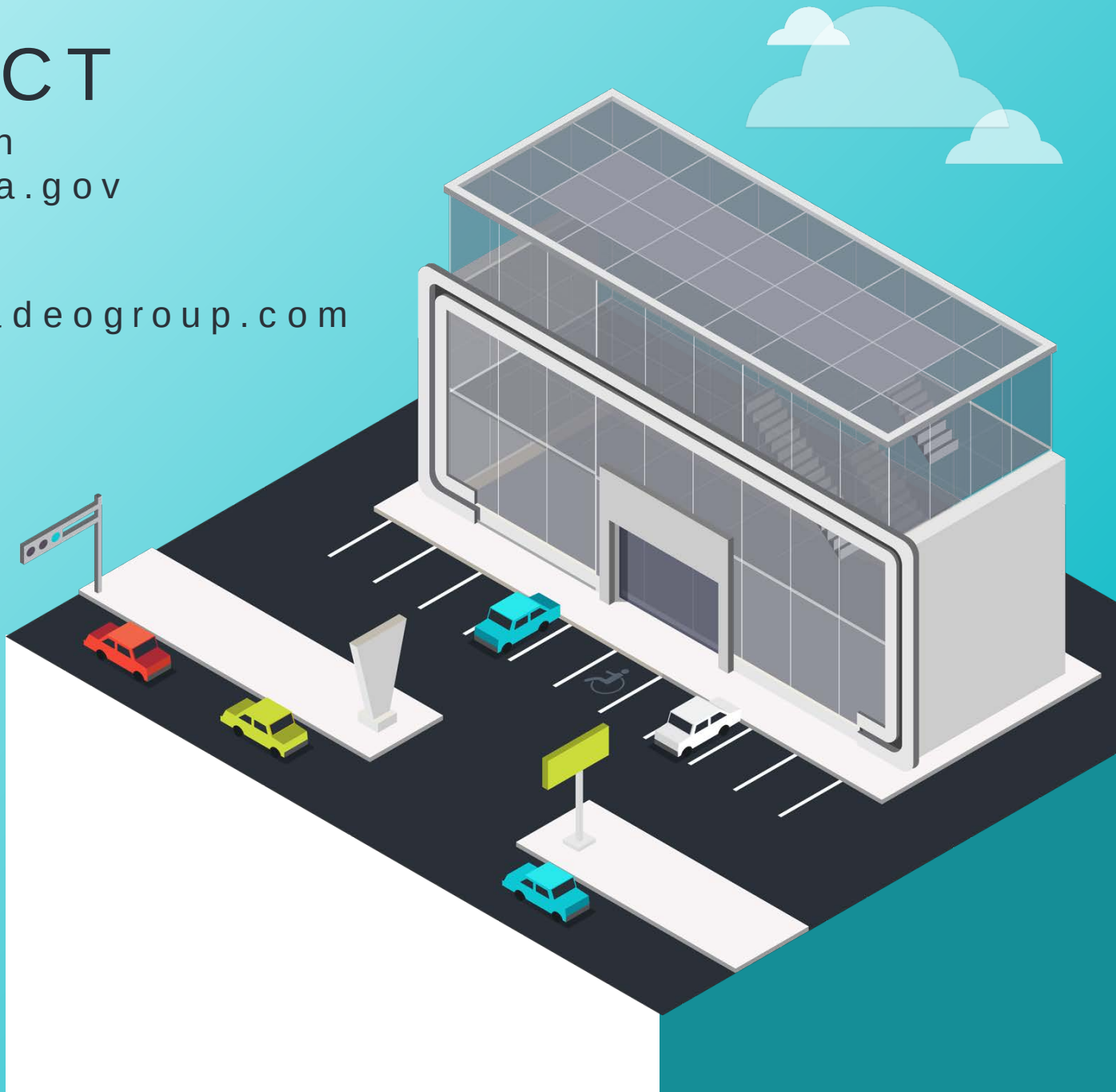

Bonneville
POWER ADMINISTRATION

THX!

Thanks for coming!

Join us next month – May 3rd