

Momentum Savings

Market Research Update

April 2015

Find research updates on our website

www.bpa.gov/goto/MomentumSavings

More Savings from Appliance Standards!

We had dozens of people take the time to review the draft appliance standards models, and we have now completed the revision of the Batch 1 models, available on the website.

This new batch of models adds up to 523 aMW of efficiency expected over the next 20 years.

THANK YOU to all the stakeholders who reviewed and improved the analysis.

These models are substantially better because of the thoughtful comments we received. We have posted all 105 stakeholder comments and our responses and actions for the finalized models on the webpage.

Allocating Momentum Savings to Utilities

On January 28th, we had a well-attended meeting in Seattle to discuss how we will allocate Momentum Savings to public utilities. We received comments on the draft approach and will issue a final approach by May 20.

We will also post draft allocation percentages and reporting templates in May— stay tuned. Thanks to feedback from utilities, we will distribute a white paper that explains Momentum Savings in early Fall 2015.

What's New?

We have draft Momentum Savings results from appliance standards, an update on allocating savings to utilities, and lots of exciting project updates. Also, the Momentum Savings research team added two new staff that joined BPA in January—welcome Bonnie Watson and Kevin Geraghty!



Come see us at Efficiency Exchange

Drop by our table at Efficiency Exchange during the networking breaks. We will have fun booklets with recent research findings, fancy buttons to dress up your conference badge holder and GIRL SCOUT COOKIES you can win if you play our scavenger hunt!

Also, don't miss our session on Tuesday, April 22nd at 9:45am where **Jacob Henry** (Grays Harbor PUD), **Bob Gunn** (Seinergy), **Tom Eckman** (NWPPCC), and **Carrie Cobb** (BPA) will share how Momentum Savings are impacting the region.

Can't make it? Email us and we will send you a button and electronic versions of all the other cool stuff available at our table. (Too bad there aren't e-versions of Girl Scout Cookies.)

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Project Updates

The New Residential Building Stock Assessment is Coming!

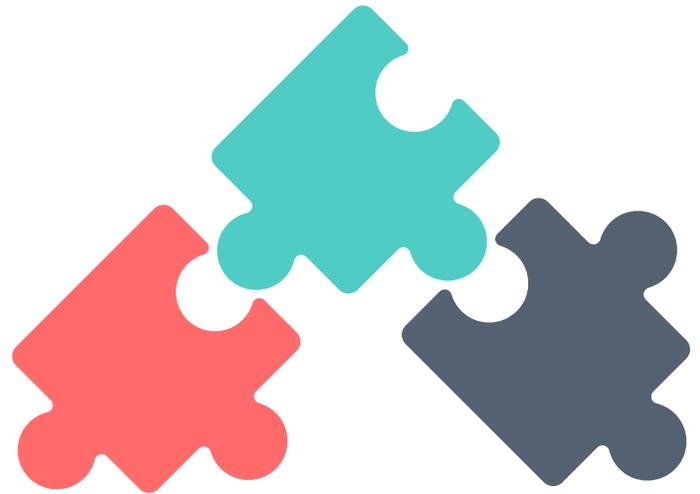
The Residential Building Stock Assessment planning is beginning. NEEA's last RBSA was a significant resource for the region, and data from that study underpins all of the residential Momentum Savings analysis as well as nearly all of BPA's residential measure savings analysis, as well as informs the regional Power Plan. This important regional data collection effort is made possible by NEEA and by NEEA's utility partners who support this research.

For utilities who want more information, please contact Christopher Frye at cfrye@neea.org.

New Commercial Existing Building Simulation Models

In partnership with the Regional Technical Forum, BPA is developing new simulation models for existing commercial buildings. We will be leveraging the Commercial Building Stock Assessment and newly available data sources for these models. Navigant Consulting, Mike Kennedy, and Big Ladder are in the process of updating these models. Once completed, they will improve our non-residential savings estimates. The models will also help us better understand the interactive effects from efficient lighting giving off less heat in buildings (thus decreasing cooling load and increasing heating load). BPA will also use these models to estimate commercial building HVAC savings from new appliance standards and market changes.

Expert advisers on this project include **Michael Lane** (Puget Sound Energy), **Mira Vowles** (BPA), **Jennifer Anziano** (Regional Technical Forum), **Charlie Grist** (Northwest Power and Conservation Council), **Bill Koran** (Northwrite), **Bill Acker** (University of Idaho) and **Christian Douglass** (Regional Technical Forum).



New Momentum Savings Team Members at BPA!

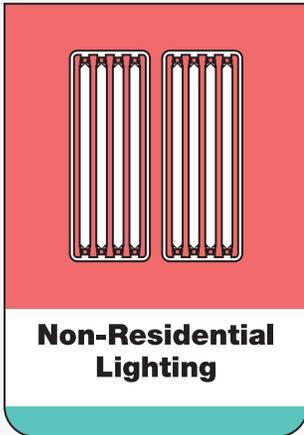
We are thrilled with our new additions:

Bonnie Watson brings her technical expertise in evaluation to our team, and makes our research in new markets possible due to her excellent project management skills. Bonnie has years of experience managing large, technically complex projects with multiple stakeholders, and is currently leading multiple projects for BPA. Bonnie was most recently a consultant at The Cadmus Group.

Kevin Geraghty brings a sharp mind to the various analytical challenges of calculating Momentum Savings. Kevin, a PhD statistician, led the development of the last Residential Building Stock Assessment statistical sample and has helped BPA improve our models calculations and transparency. Kevin leads the Momentum Savings technical savings analysis. Kevin was most recently a consultant at Ecotope.

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Project Updates



Non-Residential Lighting

We are wrapping up the data collection to characterize the non-residential lighting market. Our team's challenge along the way has been managing LED data and tracking the constantly changing SKUs. While we are behind schedule due to these difficulties, it appears that we will be able to provide more detailed lighting data than has ever been collected before with a larger market share than we had last year. Expect to see a market intelligence report in late April and a draft savings model available for comment on our webpage in May.

Non-Residential Lighting Controls

We are beginning a scoping study on a comprehensive market analysis of lighting controls. The scoping study will focus on baseline definitions by product category; comparability of existing metered data sources and a sampling strategy.



Residential Lighting

We are kicking off a study to capture Momentum Savings from residential LEDs. This study will model the entire residential lighting market— including both inefficient and efficient products— to understand market trends, including lamp types such as linear fluorescents.

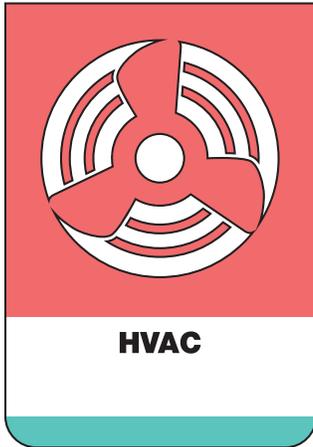
We will also be exploring the overlap between the residential and commercial sectors in the retail and distribution channels so we can better understand how to track the savings and inform program strategy. We are working on this project in collaboration with NEEA, who tracks CFL sales for the region and conducts multiple studies on lighting, such as the long-term monitoring and tracking lighting shelf studies and consumer surveys.



For more about Momentum Savings, contact Carrie Cobb at lcobb@bpa.gov

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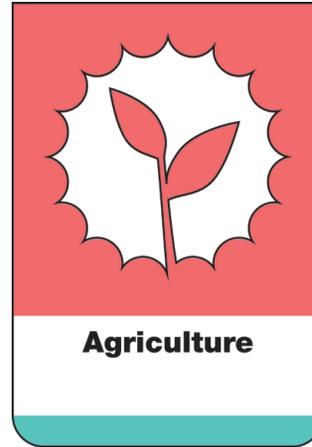
Project Updates



HVAC Market Characterization

The research team recently collected sales data and completed interviews with market actors. From these findings, we developed a market characterization report on the webpage and at Efficiency Exchange— check it out! This report includes some interesting new results showing that from 2010 to 2014 we see the more efficient SEER level heat pumps shifting from 14/16 SEER to 17 SEER. However, a stubborn 58% of the market is at the baseline efficiency of 13 SEER, relatively unchanged since 2010. The challenge is figuring out a strategy to reach these laggards.

We are in the process of modeling residential HVAC Momentum Savings now, so stay tuned for draft results on the website this spring.



Agriculture Market Characterization

We have finished the first phase of the agriculture market characterization which included a scan of secondary data sources to determine what data are available and mapping the supply chain for products and services. In the second phase of this project which will begin in May, we will explore irrigation program opportunities in this sector. Please see the website for the deliverables from Phase 1 and the next deliverables from Phase 2.

Scientific Irrigation Scheduling (SIS) Baseline Field Study

The SIS baseline field study is entering the next phase in which we will finalize the data collection protocol and work with regional partners to finalize the sampling design. We will also work with utility partners to determine how to effectively recruit growers.



Appliance Standards

We have the first batch of draft Momentum Savings models posted on the website, with another batch coming in May. We will have a final report and a standards program guide for program managers coming soon.