

# Momentum Savings

Market Research Update

October 2015



Find research updates on our website

[www.bpa.gov/goto/MomentumSavings](http://www.bpa.gov/goto/MomentumSavings)

## Momentum Savings Workshop coming soon!

Do you wish you understood Momentum Savings better? Do you love this new source of seemingly free savings? Are you skeptical that Momentum Savings exist? Do you worry that BPA doesn't have enough independent review of Momentum Savings? Are you worried that Momentum Savings could destroy programs? Are you excited about improving programs from Momentum Savings market research? And what **IS** a current practice baseline?

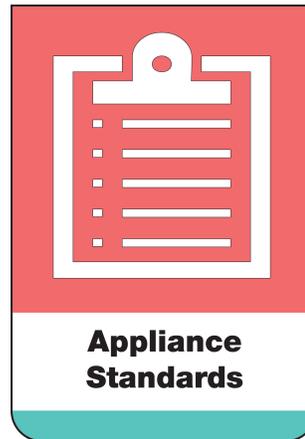
Early next year we will be tackling this and more. You will leave understanding momentum savings analysis better and understand how they link with BPA's programs, and you will have had the opportunity to ask questions and engage in lively discussion. While we will have a phone and webinar connection, we highly encourage in-person attendance. Watch the weekly announcements on RSVP information.

## White Paper on Momentum Savings

We have recently finished a white paper on Momentum Savings. You can find it on the BPA Momentum Savings webpage:

[www.bpa.gov/goto/MomentumSavings](http://www.bpa.gov/goto/MomentumSavings).

Please send feedback on this white paper to Carrie Cobb at [clcobb@bpa.gov](mailto:clcobb@bpa.gov).



## What's New?

Results from the appliance standards project, appliance standards, non-residential lighting project and residential HVAC project will soon be available at the BPA website. We will also be releasing

our methodology framework document for comment and review (it will be announced in our weekly updates!) We have several new projects launched, including an agricultural market study, residential lighting, weatherization and non-residential lighting controls.

## Momentum Savings reporting

BPA will be hosting a webinar to discuss the issue of baseline consistency between utility Conservation Potential Assessments and Momentum Savings. To be able to report Momentum Savings to utilities, the baselines need to be consistent. This webinar will describe the problem and share some straw-proposal solutions. Look for the date in the BPA weekly announcements.

On the allocation, BPA received multiple comments on reporting Momentum Savings to utilities, which we have posted on the momentum savings webpage, along with BPA's plan.

# Momentum Savings

## Market Research Update

### The Non-Residential Lighting Draft Results

BPA recently completed a project to characterize the non-residential lighting market. The results of this study include more detailed lighting data than has ever been collected before with a larger market share than we had last year. They suggest a very large amount of Momentum Savings, and with really big savings comes really big responsibility.

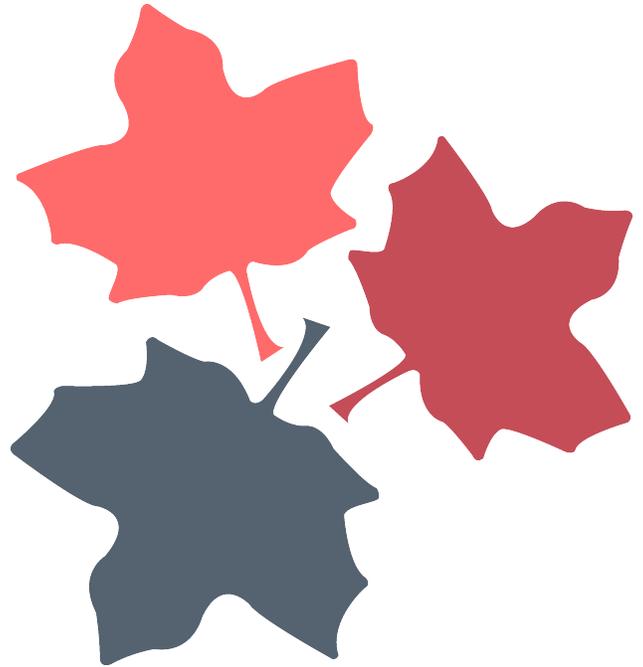
We identified two concerns with our analysis: (1) the models are complex and to perform the sophisticated calculations we are doing to estimate a few key inputs in Excel creates analysis that quickly lacks transparency; (2) we do not have the analytical framework to estimate uncertainty or do robust sensitivity analysis.

Because of this, we are keeping our estimates in draft while we convert our model to a more robust platform. However, the report and findings will be posted on the BPA Momentum Savings webpage.

### The New Residential Building Stock Assessment is Coming!

The Residential Building Stock Assessment planning is underway. NEEA's last RBSA was a significant resource for the region, and data from that study underpins all of the residential Momentum Savings analysis along with 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](mailto:cfrye@neea.org).



### Coming this Fall

#### Scoping of data collection beginning

Over the Fall we will be scoping baseline data collection for residential HVAC and for non-residential lighting. If you are interested in participating, contact Carrie Cobb at [lcobb@bpa.gov](mailto:lcobb@bpa.gov).

#### Portfolio Review

The Portfolio Review project deliverables are arriving. We plan to have results posted on the webpage this Fall.

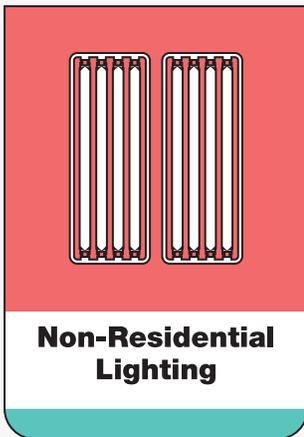
**For more about Momentum Savings, contact Carrie Cobb at [lcobb@bpa.gov](mailto:lcobb@bpa.gov)**

# Momentum Savings

## Project Updates

### (New!) Weatherization Market Characterization Pilot

We just kicked off a pilot project to look at weatherization. We are testing some data collection methods and developing a framework to categorize the market actors. We will be engaging with members of the Weatherization Advisory Group to help inform future research and shape the research questions. We are not currently looking at quantifying Momentum Savings for weatherization, as the expected savings are low and the data needs are high.

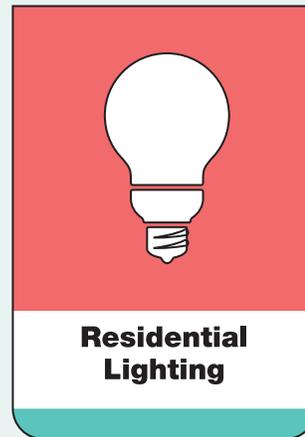


### Non-Residential Lighting Controls Scoping Study

In June, we began a scoping study on a comprehensive market analysis of lighting controls. The scoping study focuses on baseline definitions by product category; comparability of existing metered data sources and a sampling strategy. Draft deliverables are rolling in; please let Carrie Cobb know if you would like to review them. The final report will be posted on the webpage at the end of the year.

### Non-Residential Lighting

We are beginning the next phase of the non-residential lighting project. We will be collecting sales data, interviewing market actors and doing a gap assessment of data needs to improve our understanding of the outdoor and industrial markets.

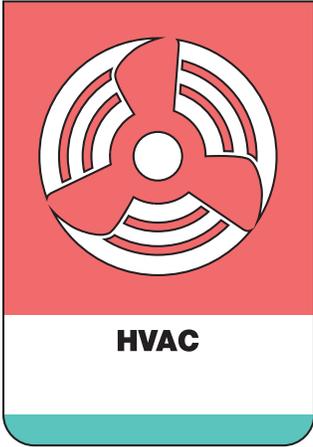


### Residential Lighting

We provided data to the Regional Technical Forum for the residential lighting measures baseline. Using a combination of sales data and shelf data collected by NEEA, we estimated that 74% of bulbs sold in the region in 2014 were either incandescent or halogen. We are currently developing our model to estimate the market, and are working to collect the remaining sales data. There are two troubling project risks; we expect the Sixth Plan baseline for residential lighting to be complicated, and we are concerned about data gaps in our sales data collection.

# Momentum Savings

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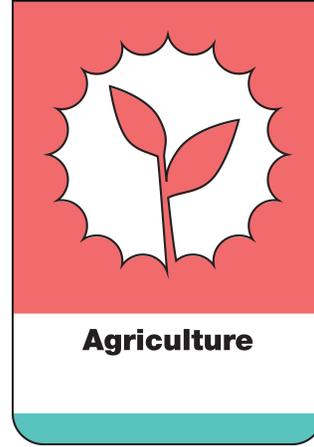


### HVAC Market Characterization

We are in the process of modeling residential HVAC Momentum Savings now and draft results will be posted for comment in the fall. The team is also developing a market intelligence booklet based on the project's findings.

### 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 developing these models. Draft models for most building types are complete and are available for



### Agriculture Market Characterization

In June, we began the second phase of our research in the Agricultural sector. This study will explore irrigation program opportunities in this sector. BPA developed a program logic model and documented the current program state over the summer, and is currently interviewing utilities and market actors to inform the market scan. The team is currently developing the methodology to estimate Momentum Savings.

### Scientific Irrigation Scheduling (SIS) Baseline Field Study

The SIS baseline field study is almost ready to launch recruitment in partnership with utilities. The data collection protocol is being updated based on the results from our field pilot.

