Northeast Energy Efficiency Partnerships

Keep Calm and Rebate on

ENERGY STAR Partner Meeting

October 13th, 2015

4:15-5:30pm

Panel

- Moderator: Claire Miziolek, NEEP
- Shareghe Mahraeen, Pacific Gas and Electric
- Rene Burger, Philips
- Stan Mertz, CLEAResult

About NEEP

Mission

Accelerate energy efficiency as an essential part of demand-side solutions that enable a sustainable regional energy system

Approach

Overcome markets and transform markets via

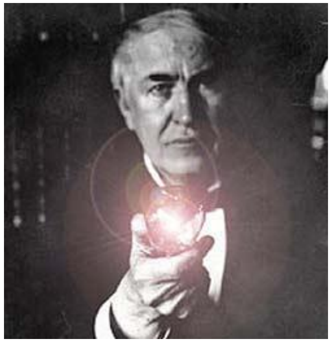
Collaboration, Education and Enterprise

Vision

Region embraces **next generation energy efficiency** as a core strategy to meet energy needs in a carbon-constrained world

One of six regional energy efficiency organizations (REEOs) funded by the US Department of Energy (US DOE) to link regions to US DOE guidance, products and programs

Lighting History Lesson



1879

1990s

2010s

1976

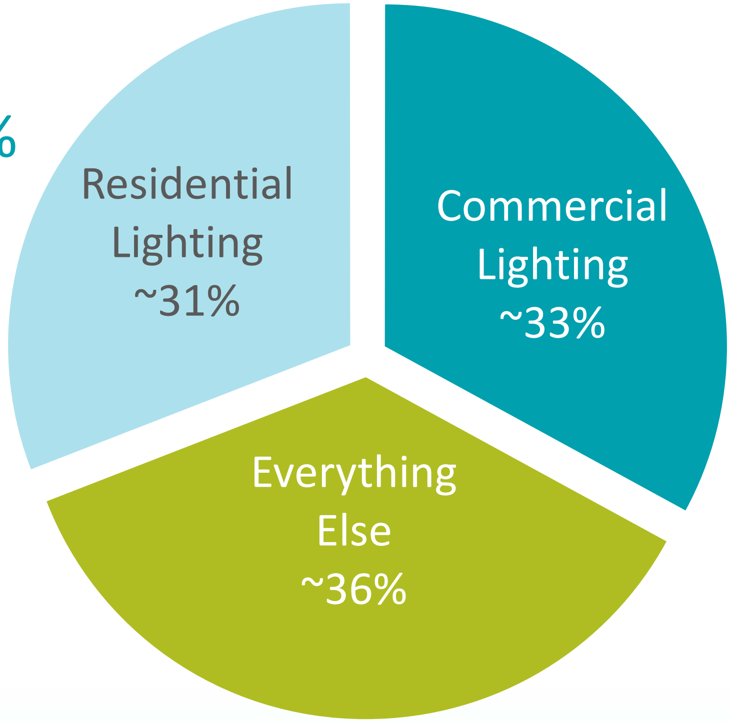
EISA
2007

Today

ENERGY STAR

Why Residential Lighting Matters for Efficiency Programs

- Centerpiece of ratepayer-funded EE programs
  - Res lighting alone provides over 30% of total program savings
- Savings are cost-effective
- (some) programs have been supporting for decades



Looking Forward

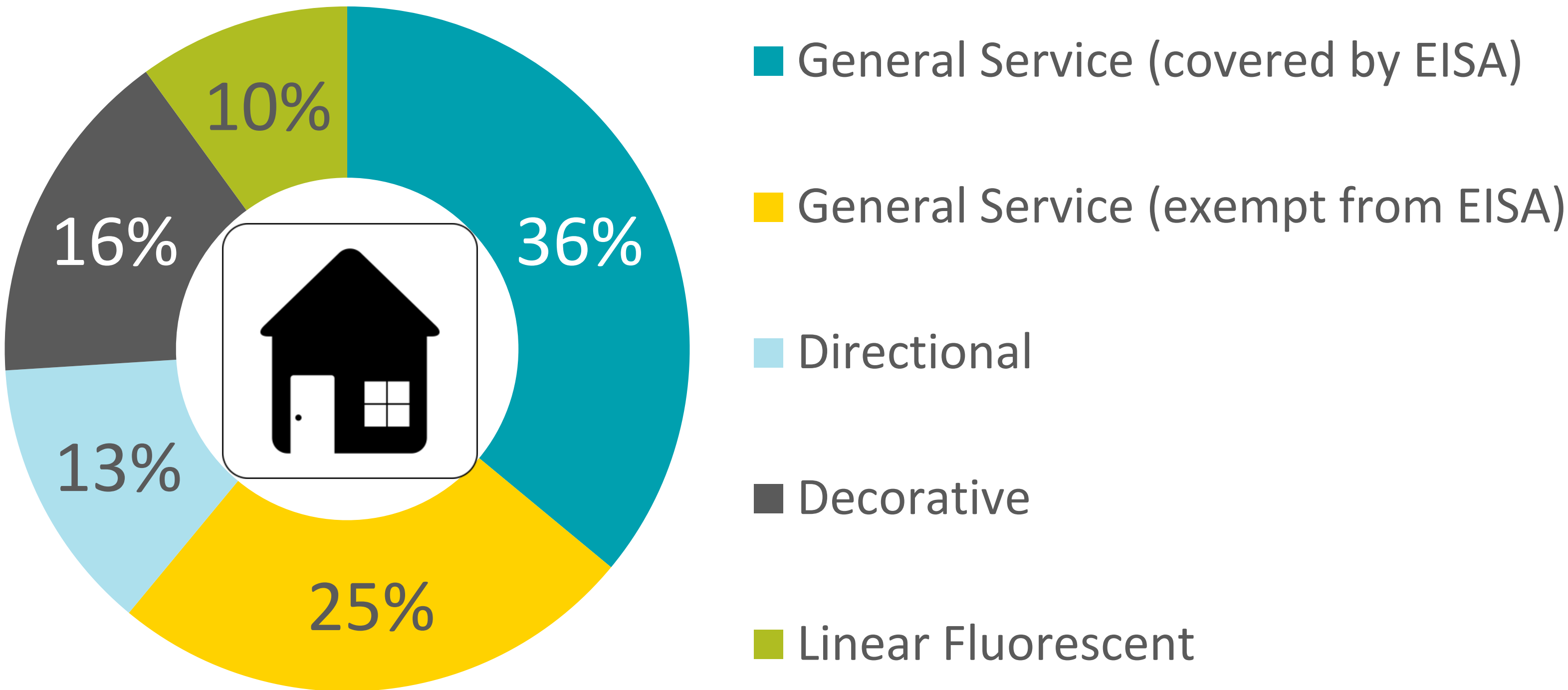
- In 2015, new questions arising:
  - Has the residential lighting market been transformed?
  - Where is the market headed? What impacts will EISA 2020 have?
  - Is there a role for residential lighting programs in the current environment?

THE STATE OF OUR SOCKETS:
A REGIONAL ANALYSIS OF THE RESIDENTIAL LIGHTING MARKET

Northeast Energy Efficiency Partnerships, August 2015
Primary Authors: Claire Miziolek, Patrick Wallace, and David Lis

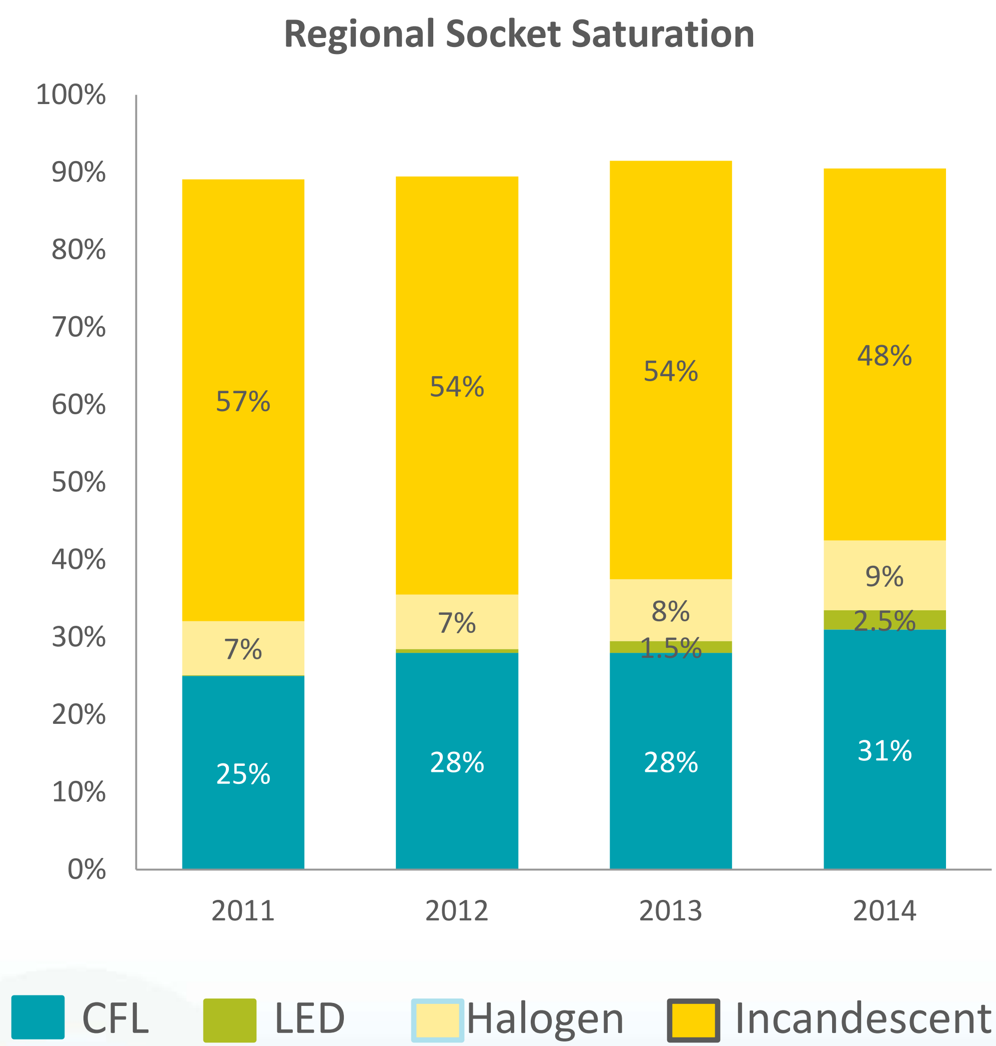
Residential lighting has long been a centerpiece of ratepayer-funded energy efficiency program portfolios. In

What is Residential Lighting?



	Efficiency (lumens per watt)	Currently available technologies and their lpw
Inefficient	< 45lpw	• Incandescent (11-16lpw) • Halogen (16-22lpw)
Efficient	≥ 45lpw	• Light Emitting Diode, LED (60-100lpw) • Compact Fluorescent Lamp, CFL (50-70lpw)

What is the Status in the Northeast?



	Total Units/ HH	2013 LED Actuals	2014 YTD LED
Connecticut	2.8	15%	39%
DC SEU	4.0	4%	23%
Long Island (PSE&G)	2.4	26%	38%
Massachusetts	3.4	15%	20%
New Hampshire	0.5	11%	
NYSERDA	0.1	47%	44%
Rhode Island	2.9	9%	20%
Vermont	2.7	20%	31%

Northeast Rebates

2015 Northeast ENERGY STAR Lighting Programs

State	Utility/Energy Efficiency Service Provider	Standard CFLs	Specialty CFLs	CFL Fixtures	Standard LEDs	Specialty LEDs	LED Fixtures
CT	Eversource The United Illuminating Co.	Up to $1		Up to $10	Up to $8	Up to $8	Up to $10
DC	DCSEU	Up to $1	Up to $7 (sunset March 2015)	Up to $5 (sunset March 2015)	Price floor $3.99 Incentive cap $5	Price floor $3.99 Incentive cap $5	Price floor $3.99 Incentive cap $15
MA	Cape Light Compact Eversource National Grid Unitil	Up to $1.40	Up to $4	Up to $15	Up to $12	Up to $15	Up to $15
NH	Eversource Liberty Utilities New Hampshire Electric Co-op Unitil	$2/pack (4≥bulbs)			$3/pack (3≤bulbs) $8/pack (4≥bulbs)		$10
NY	NYSERDA*						
NY	PSEG - Long Island	$0.80	Up to $2		Up to $5	Up to $6	Up to $6
RI	National Grid (RI)	Up to $1.40	Up to $4	Up to $15	Up to $12	Up to $15	Up to $15
VT	Efficiency Vermont	Price floor 0.99	As of 10/1 no incentive (potentially temporary)		Price floor $4.99 Incentive cap $6 (As of 10/1)	Price floor $4.99 Incentive cap $6-17	Price floor $4.99 Incentive cap $15

Program Strategies Moving Forward

- Short term (1-3 years):
  - Continue to promote LEDs for all residential applications
  - Promote standard CFLs as a low-cost efficient option until LED prices are more competitive with halogens

- Longer term (3-6 years):
  - Promote specialty LEDs (including directional and decorative) until the market is transformed or it is no longer cost effective to do so

Trends in the Northeast and Beyond

- Promotion of all ENERGY STAR lighting products, including:
  - Continued promotion of Standard CFLs, but moving away from specialty CFLs
  - Heavily promoting LEDs of all kinds
  - PAs rely on ENERGY STAR certification to ensure quality products
- Accurate and consistent consumer messaging and education
- Targeting specific products or market channels
  - e.g. specialty LEDs, E-commerce, drug stores, and other “Hard-to-Reach” demographics and channels
- A need for better data to validate the impact programs are having on the market
  - Especially category level sales data, including information on LEDs, CFLs, specialty lighting, fixtures, and baseline halogen-incandescent.
- Keeping a close eye on low-lifetime, low-cost LEDs entering the market

Let's Hear from the Panel

- Shareghe Mahraeen, Pacific Gas and Electric
- Rene Burger, Philips
- Stan Mertz, CLEAResult