

Regional Roundup 2003

Partnerships for Market Transformation - Reports from the Field

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Together We Can Change National Markets

Introduction

- Purposes – Share key experiences, lessons learned, prognosis for partnerships as a program strategy
- Standard Format
- Panelists:
 - Northwest – Margie Gardner, NW Alliance
 - California – Steve McCarty, PG&E
 - Texas – Karen Radosevich, Entergy and EUMMOT
 - New Jersey – Fred Lynk, PSE&G
 - New York – Andrew Fisk, NYSERDA
 - Northeast – Sue Coakley, NEEP
 - Southwest - Howard Geller, SWEEP
 - Midwest – Alecia Ward, MEEA



Together We Can Change National Markets

Efficiency Partnerships in the Northwest

- Program Administrators:
 - NW Energy Efficiency Alliance
 - Energy Trust of Oregon
 - Northwestern Energy
 - Local Utilities and Bonneville Power Administration
- 2003 Funding ~\$120 Million



Efficiency Partnerships in the Northwest

- Interesting Partnership Examples:
 - Advanced Silicon Manufacturing Inc.
 - New Schools
 - Energy Star Lights and Appliances
- Lesson Learned
 - Bring Partners in Early and Often – Work within their Time Line and Business Model



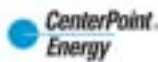
Introduction to Efficiency Partnerships in California

- Program Administrators
 - Pacific Gas and Electric Company
 - Sempra Energy
 - Southern California Edison
- Overview of 2003 Funding: \$274 million
- Status of Future Funding
- Approach/Philosophy to Partnerships

Efficiency Partnerships in California

- Programs and Partners
 - Residential Products
 - Retail Chains, Independents & Big Box Stores
 - Small Business Rebates
 - Vendors, Community-Based Organizations & Non-Profit Organizations
 - New Construction
 - Architects, Builders & Developers
- Value to Programs
- Lesson Learned: Programs need continuity, predictability & consistency
- Prognosis

Introduction to Efficiency Partnerships in Texas



- Program Administrators
 - Texas Distribution Utilities
- Overview of 2003 funding
 - \$86 million
- Status of future funding
- Approach/philosophy to partnerships

Efficiency Partnerships in Texas



- Programs and Partners
 - Standard Offer Programs
 - Unique for each customer market
 - Market Transformation Programs
 - ENERGY STAR for Homes
- Value to programs
 - Distribution Utilities
 - Regulators
 - National Stakeholders
- Lesson Learned
 - Partnering = Compromise
- Prognosis

Introduction to Efficiency Partnerships in New Jersey



- Program Administrators:
 - All IOU Electric and Gas Utilities (7 total)
 - NJ Board of Public Utilities
 - NJ Clean Energy Council
- Overview of 2003 funding \$150 M
- Status of future funding
- Approach/philosophy to partnerships

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Efficiency Partnerships in New Jersey



- Programs and Partners:
 - “Cool Advantage”– Eastern Heating and Cooling Council
 - “ENERGY STAR Homes” – Office of “Green Buildings,” NJ Department of Community Affairs
 - All programs – NRDC/NEEP
- Value to programs
- Lesson Learned: Able to reach certain markets more effectively with the help of our partners.
- Prognosis

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Introduction to Efficiency Partnerships in New York State

- Program Administrator:
 - 1. NYSERDA (SBC through the NYS PSC)
 - 2. LIPA (Clean Energy Fund)
- Overview of 2003 funding
 - \$150 M SBC
 - \$32 M CEF
- Status of future funding
- Approach/philosophy to partnerships

Efficiency Partnerships in New York State (SBC)

- Programs and Partners:
 - Commercial & Industrial
 - NY Energy Smart Schools: NYSED, ASBO
 - New Construction Program: Local AIA chapters, ESDC
 - Residential
 - Keep Cool (w/ LIPA & NYPA): RAC Retailers and Manufacturers
 - Energy Star® Labeled Homes: NYSBA, Home Builders
 - Home Performance w/ Energy Star®: HVAC, Insulation Contractors, and remodelers
- Value to programs
- Lesson Learned: Market partner buy-in to program strategy is critical. Keep listening!!
- Prognosis

Introduction to Efficiency Partnerships in the Northeast US

- Program Administrators:
 - Utilities (MA, RI, NH, CT, NJ)
 - Public Utility Commissions (ME, NJ)
 - State Energy Office (NYSERDA)
 - Independent Administrator (Efficiency Vermont)
- Overview of 2003 funding - \$600,000
- Status of future funding - Uncertain
- Approach/philosophy to partnerships: Coordinated and joint projects

Efficiency Partnerships in Northeast US

- Programs and Partners:
 - Energy Star Products – CT, RI, MA, NH, NY
 - Premium Motors – CT, RI, MA, NH, NJ, NY, VT
 - State Efficiency Standards – MD, CT, MA, NH, RI, NH, ME, NJ, NY
 - Value to programs: Leveraging, market effects
- Lesson Learned: Importance of policy support for MT and regional coordination
- Prognosis: OK – but state budget issues are a challenge

Energy Efficiency Programs in the Southwest (AZ, CO, NM, NV, UT, WY)

- 2003 Utility Program Funding ~ \$50 million
 - PacifiCorp (UT) - \$20-25M
 - Nevada Power (NV) - \$11M
 - Xcel Energy (CO) - \$11M
 - Other - ~\$5-10M
- Program funding on the rise -- could reach \$100 million by 2005
- Key drivers: high growth, IRP, water scarcity, air quality

Efficiency Partnerships in the Southwest

- Very effective Energy Star Home programs in AZ and NV -- state/federal/utility/builders
- No regional partnerships related to energy efficiency so far
- Regional Market Transformation Initiative -- workshop in 2004, possible launch by 2005
- Opportunities: windows, evaporative cooling, reflective roofing, other innovative technologies and practices