

Plenary Session

What Role Can Market Transformation Play in the Evolving EE Paradigm?

- Lara Ettenson, NRDC
- Bob Jenks, Oregon CUB
- Susan Stratton, NEEA
- Jim Jerozal, Nicor Gas
- Moderator: Lauren Casentini, Resource Innovations

Market Transformation Definition

- Strategic process of intervening in a market to create lasting changes
 - that result in energy savings

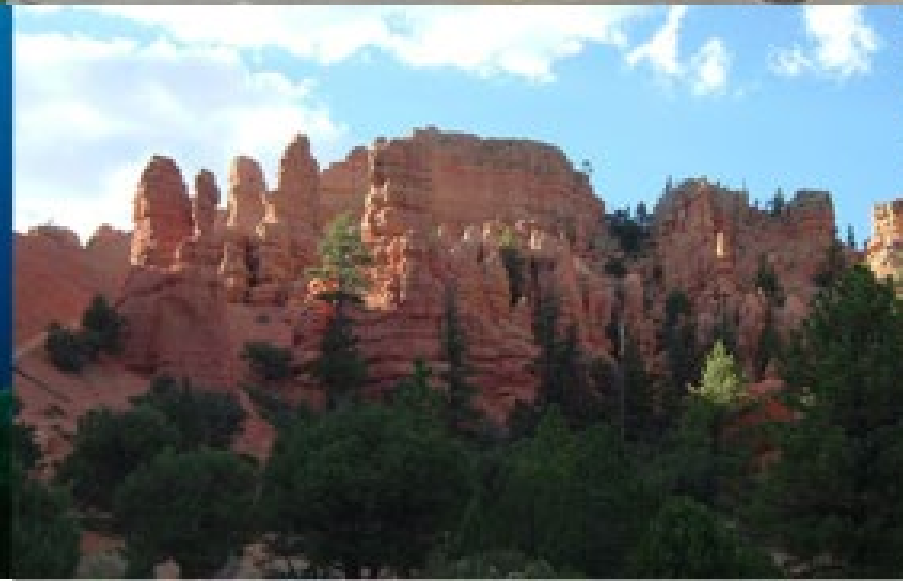
MARKET TRANSFORMATION IN CALIFORNIA



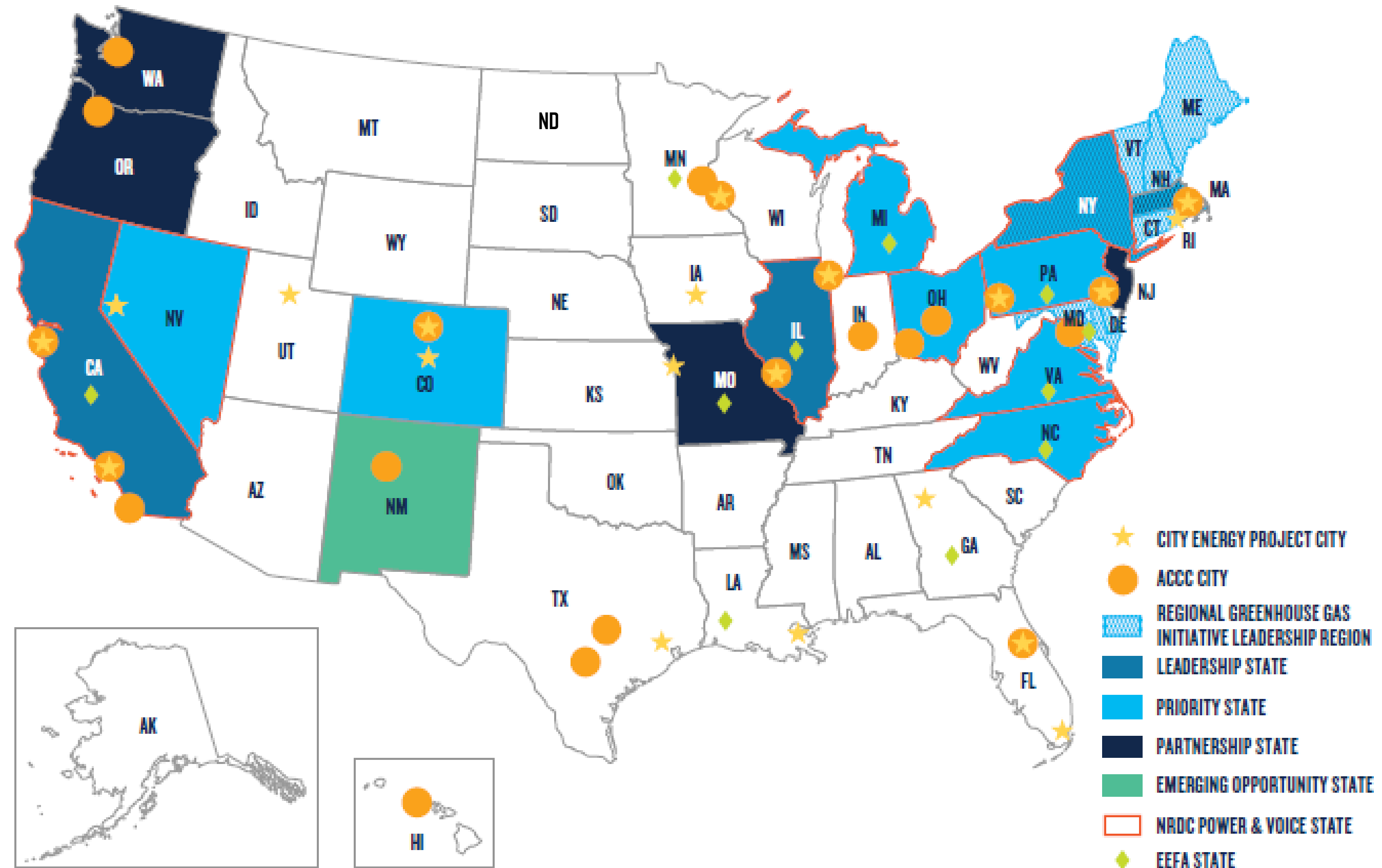
Lara Ettenson
Director, Energy Efficiency Initiative
lettenson@nrdc.org
February 21, 2019

NRDC's Mission

To safeguard the Earth: its people, its plants and animals, and the natural systems on which all life depends.

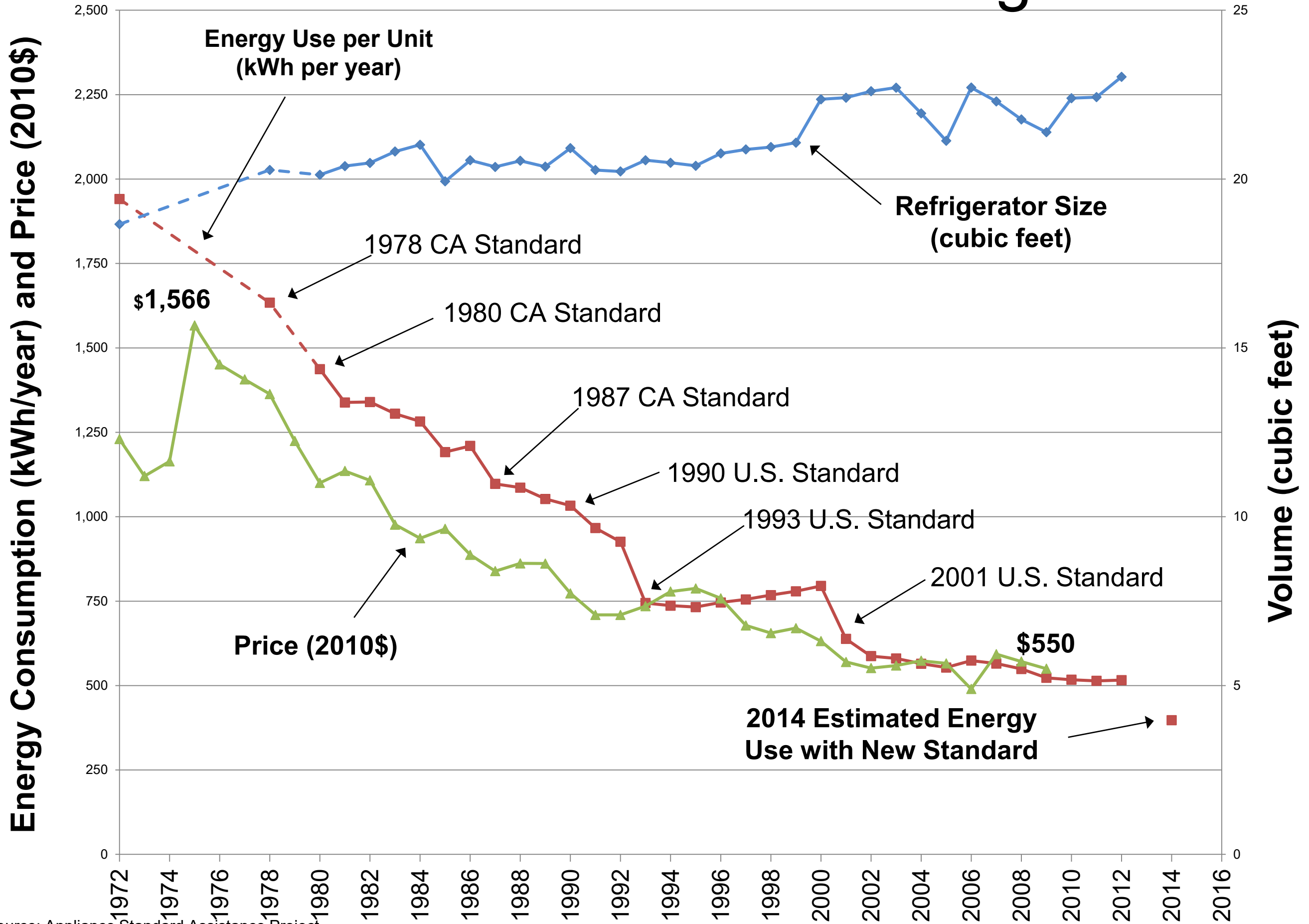


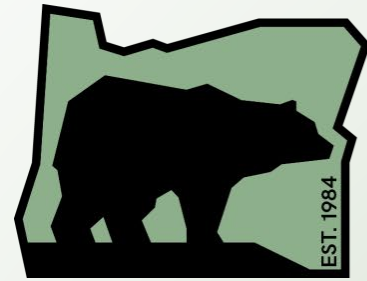
NRDC CLIMATE AND CLEAN ENERGY STATE GROUND GAME MAP



Limited Engagement States: AZ, FL, GA, ID, IO, KS, MN, MT, SC, WI

Transformation of the Fridge





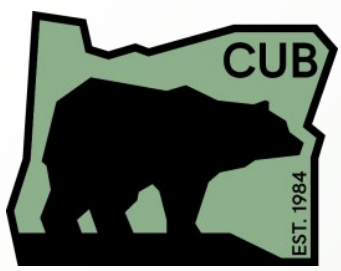
Oregon CUB

Market Transformation in the Pacific Northwest



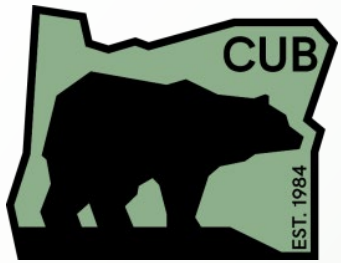
Bob Jenks
Executive Director, Oregon
CUB

Midwest Energy Solutions
Conference
February 21, 2019

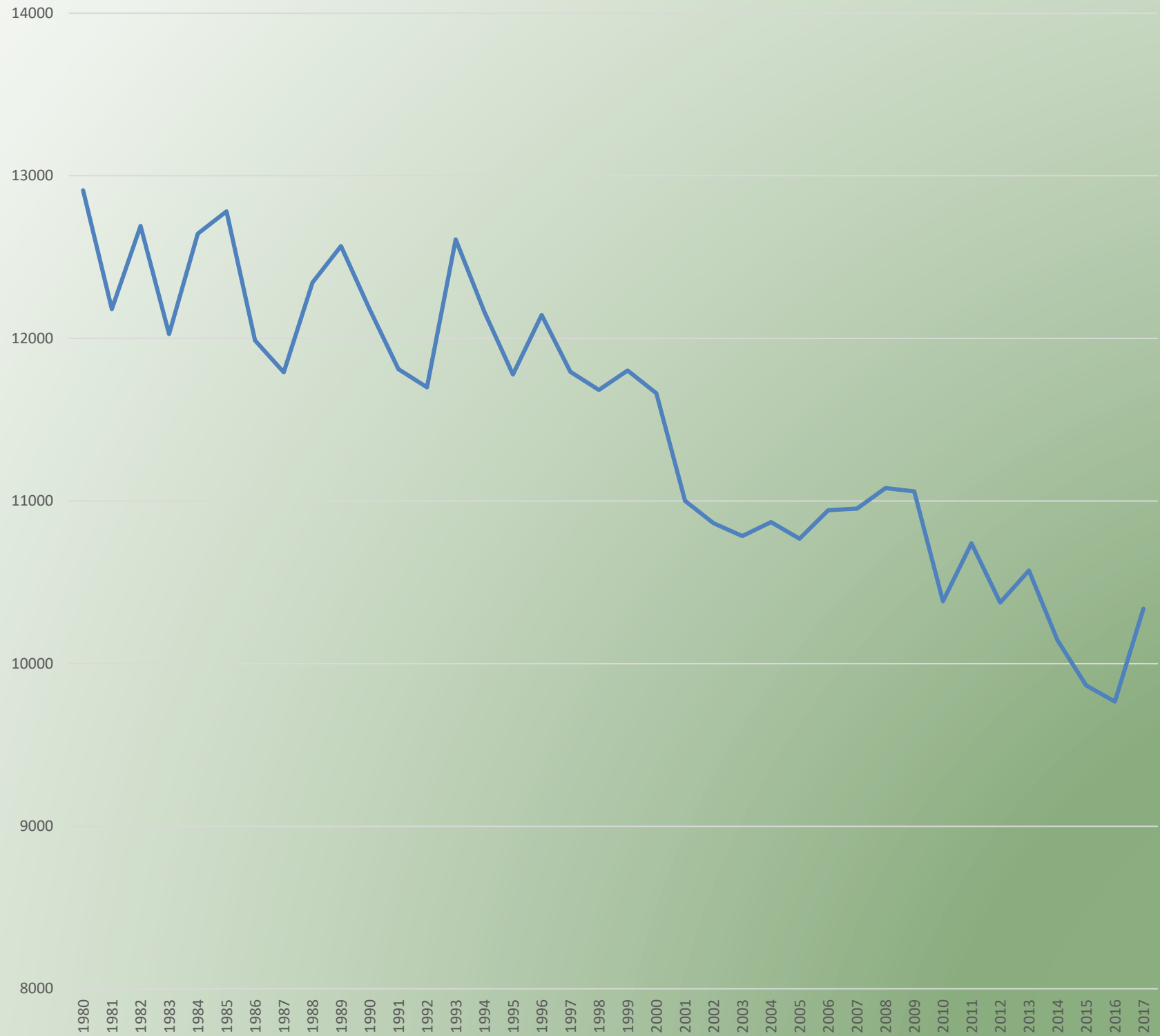


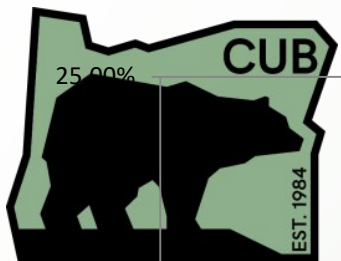
Pacific Northwest Electric Power Planning and Conservation Act of 1980

- Northwest Power and Conservation Council
 - 20 year resource plans
- Conservation Priority Resource
 - Council would identify conservation targets
 - BPA directed to get conservation before output of new resources

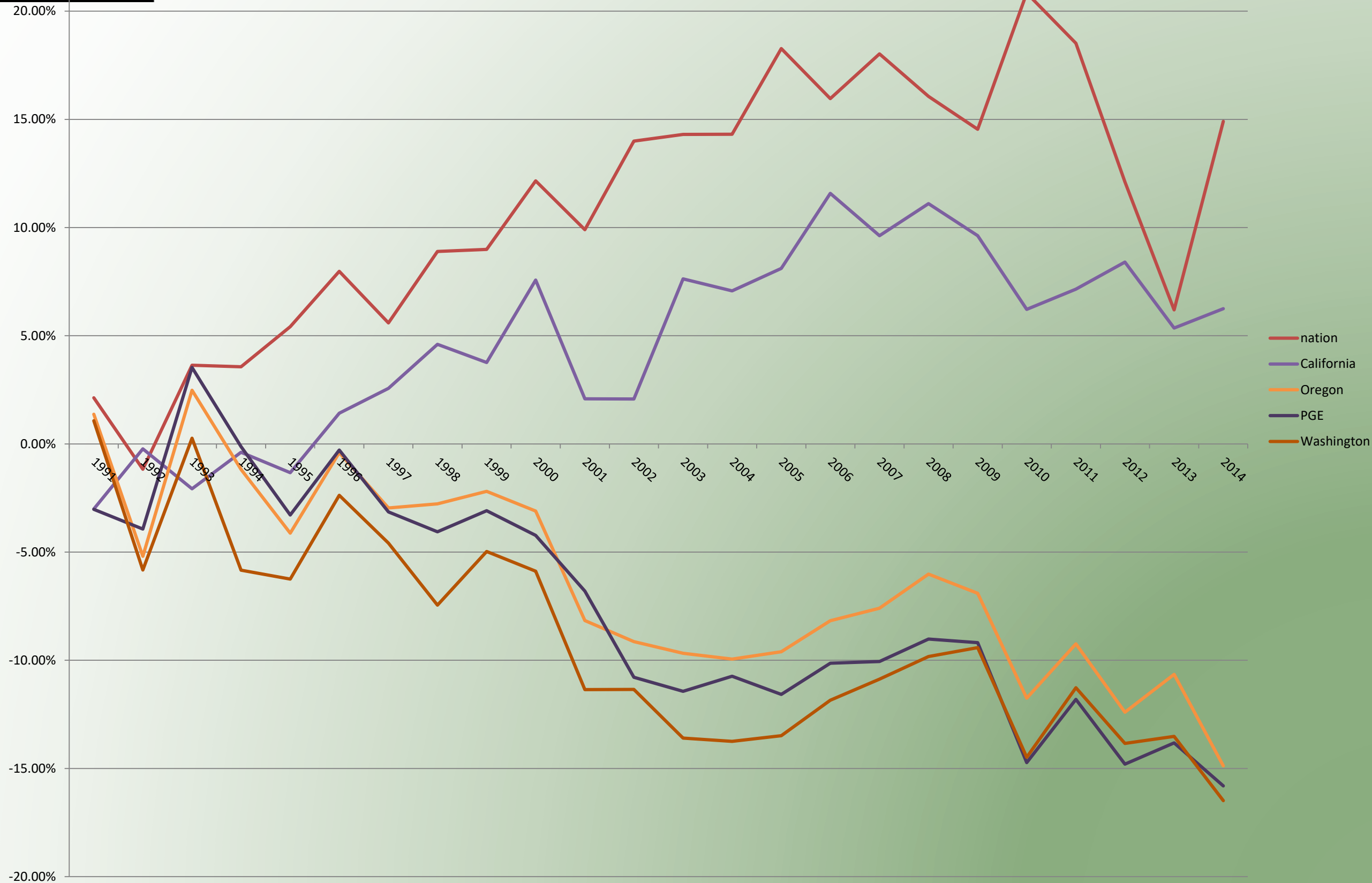


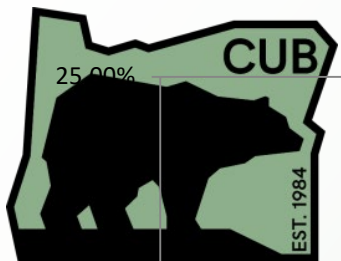
Average Household Usage Portland General Electric



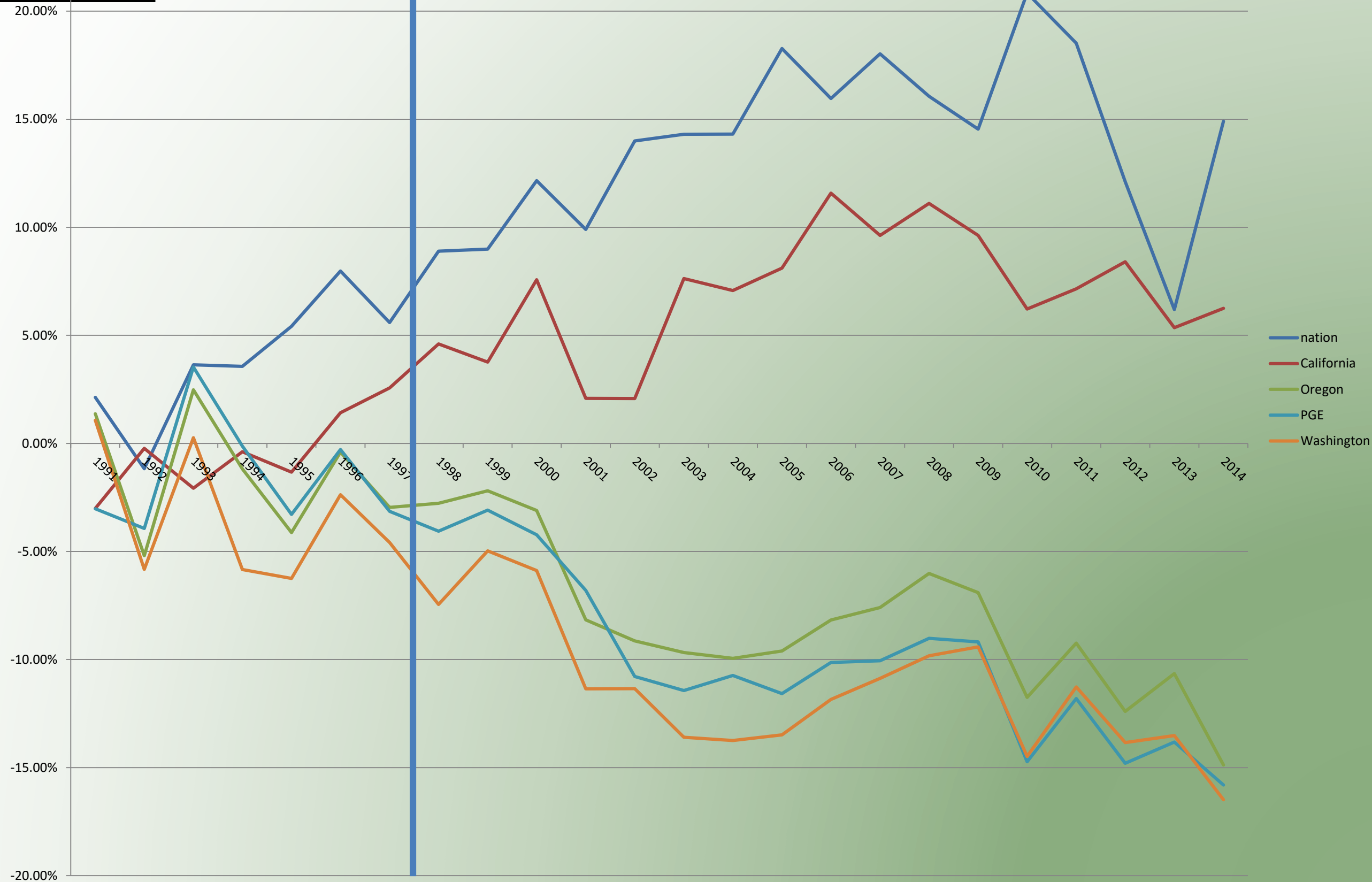


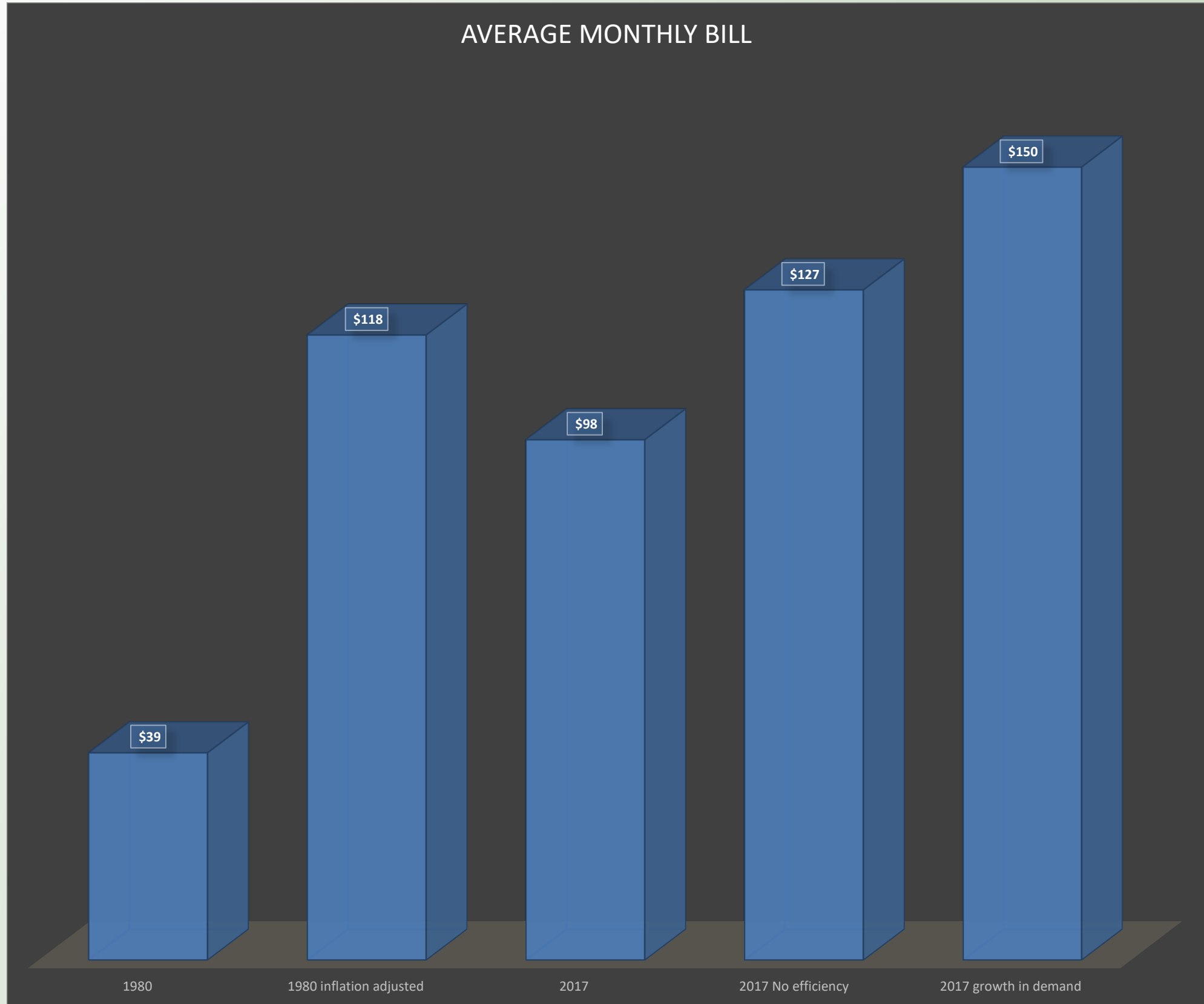
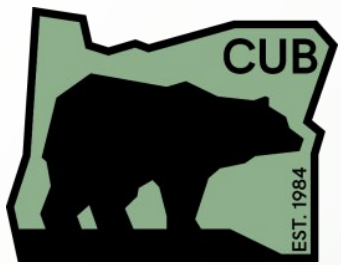
Percent Change in Residential Electricity Usage Since 1990

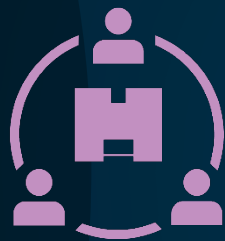




Percent Change in Residential Electricity Usage Since 1990







Northwest Perspectives: 20 years of Market Transformation

Presentation at
Midwest Energy Solutions Conference
February 21, 2019

Susan E Stratton
Northwest Energy
Efficiency Alliance

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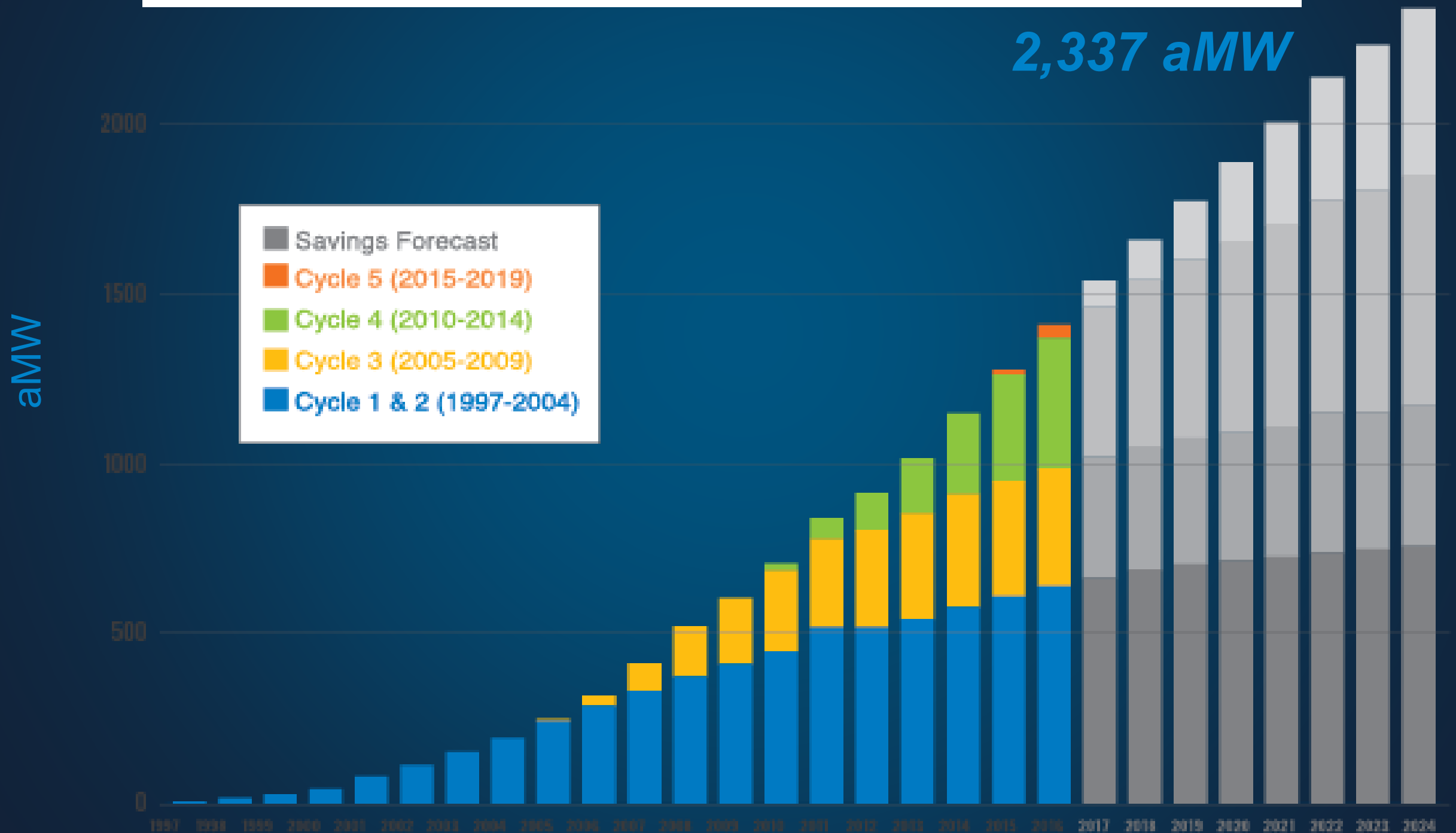


NEEA is
AN ALLIANCE
of 140+ utilities and
energy efficiency
organizations across
four states:

Idaho
Montana
Oregon
Washington

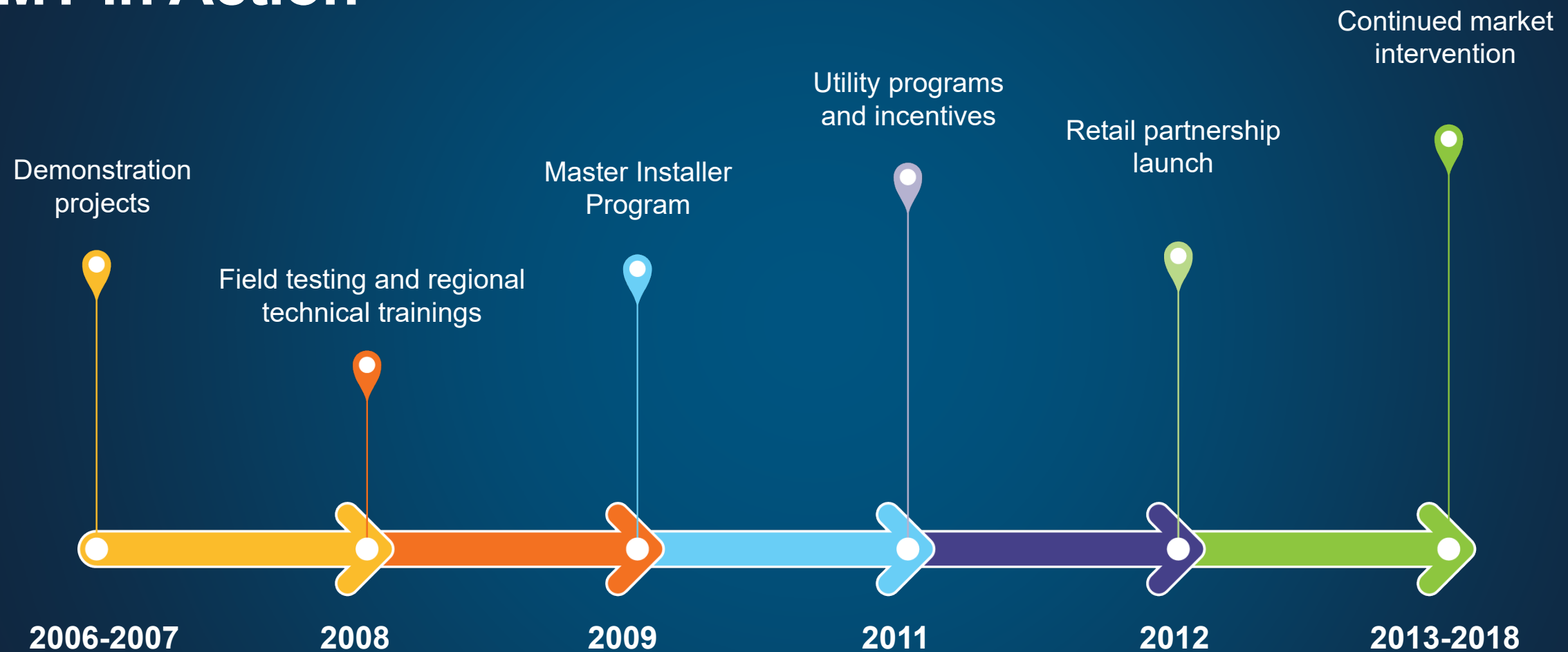


20+ years of Northwest Market Transformation 1997-2024



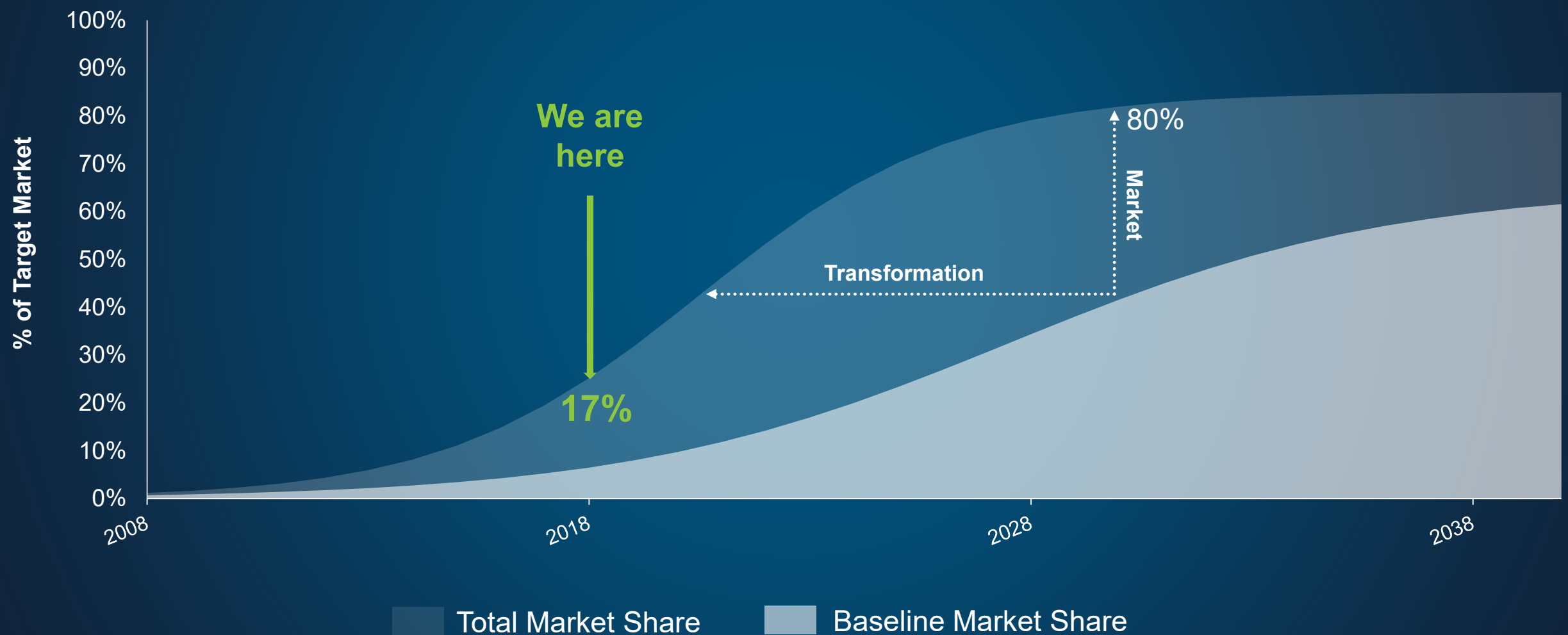
Ductless Heat Pumps

MT in Action



Ductless Heat Pumps

Market Transformation in Action

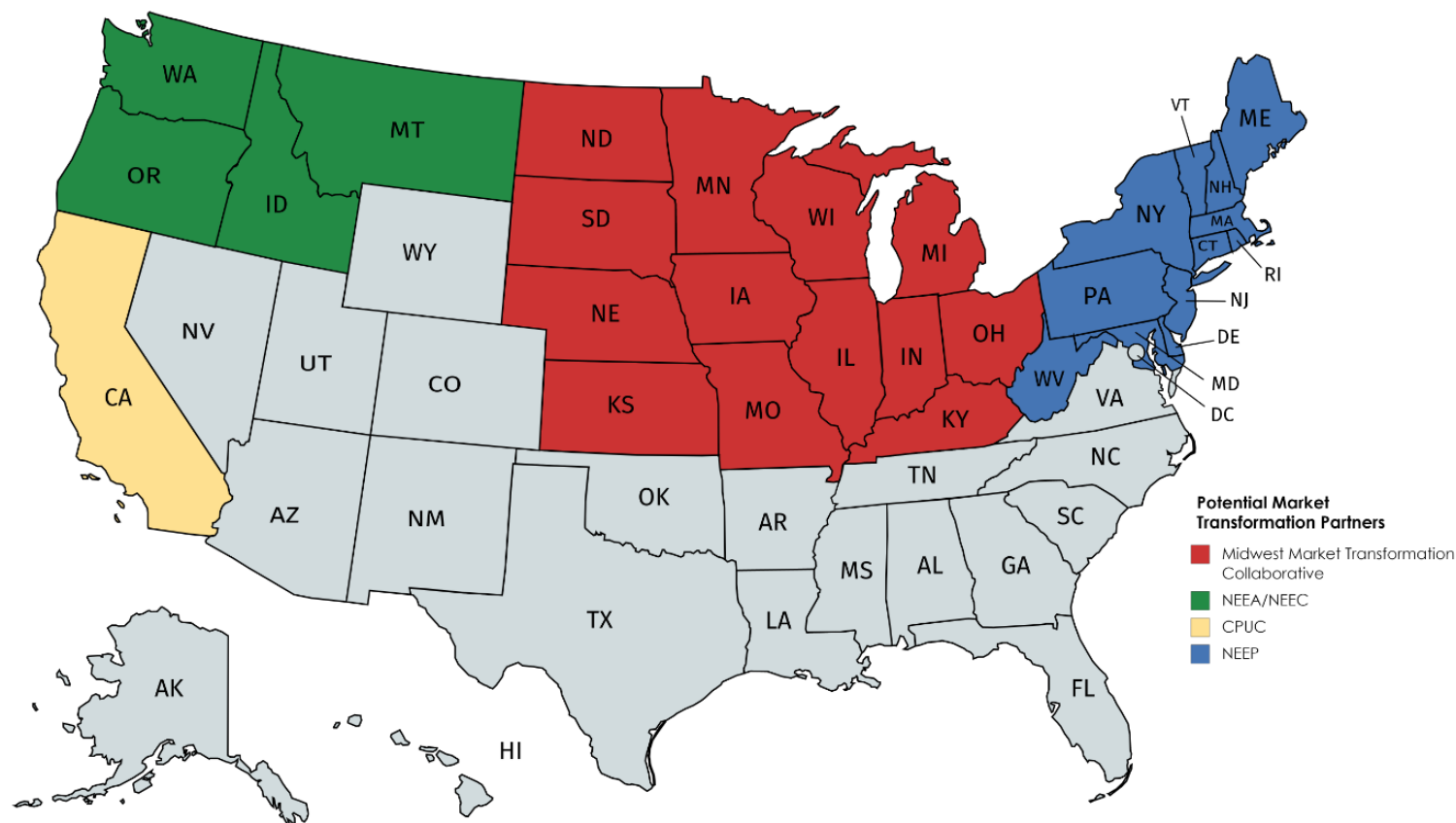


Northwest MT Lessons Learned

1. Start with the end in mind...Start and end with logic
2. Manage risk with diverse portfolio
3. Commit to the long term (10-20 years)
4. Address life-cycle: emerging tech to codes & stds
5. Respect markets: powerful and difficult to predict
6. Rely on data, early and often
7. Develop interventions that drive market change
8. Collaborate, collaborate, collaborate, repeat
9. Practice Adaptive Management



Midwest MT Vision



- MW MT represents ~22% of US population*
- NEEA, CPUC, NEEP deeply involved in MT Activities
- In aggregate, if all organizations worked together, >50% of the US population could send an energy efficiency message to markets.
- Enormous MT potential

*Census and American Community Survey

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