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MEMO

Date: April 1, 2010
To: Board of Directors
From: Philipp Degens, Evaluation Manager
Spencer Moersfelder
Subject: Staff Response to the 2009 Oregon Lighting Market Assessment

The Commercial and Industrial Oregon Lighting Market Assessment provided very timely information. Updating the market conditions to take into account major changes in codes and standards as well as adoption of various lighting technologies is crucial for Energy Trust to plan and redesign programs. The study shows that lighting in the C&I market still provides a significant untapped regional energy efficiency resource that Energy Trust can target.

The phase out of T12s in 2012 and the new high performance (HP)T8 baseline should be seen as an opportunity that requires advanced planning. Energy Trust programs have anticipated some of these changes by including the new baselines in our cost-effectiveness tests for the effected years. The programs are currently developing (and will continue to develop) new offerings that can provide cost effective energy efficiency with the new baseline. One example is a prescriptive 25-28 watt T8 offering with low ballast factor ballast.

Energy Trust sees that increasing the expertise of the supply chain is a necessary component of any effective market-based strategy for lighting retrofits. Installation and commissioning of controls as well as easy-to-implement lighting design are viewed as important components in continuing education offerings. Energy Trust programs will continue to provide the lighting contractor network with training opportunities as well as developing presentation, workshops , seminars and other materials that can keep lighting contractors aware of new energy efficient technologies and approaches. We are discussing with CEE and NEEA the possibility of a coordinated regional or national effort built around standard layouts and training for advanced lighting retrofit.

Energy Trust was also viewed by many of the lighting market actors to have had a significant impact on the market adoption of HP T8 technology. Energy Trust is taking steps in developing a market transformation model that may allow Energy Trust to claim market transformation based savings for its influence on market acceptance and thus (in proportion to its share of the US) on the Federal standard. The model will also collect baseline data that will help support market transformation efforts for the next generation of lighting technologies.

In the area of new construction the 2010 Energy code has addressed most (if not all) of the study recommendations. Lighting power densities have been significantly decreased and lighting control requirements have increased.

The study shows that light emitting diode (LED) technology is still at the initial phases of market adoption with little to no penetration in most applications. Energy Trust is monitoring this market and supporting the Energy Star LED fixture specification. As cost effective applications enter the market Energy Trust is providing incentives first at a custom project basis and then as a prescriptive measure.