

The Northwest Energy Efficiency Alliance (NEEA) was founded in 1997 on a new and promising notion – that by working together to identify and remove market barriers throughout the supply chain, the region could achieve permanent gains in energy efficiency. Twenty-three years later, market transformation is recognized across the country as a powerful tool for delivering energy efficiency and the alliance as its most experienced purveyors.

Letter to the Region

2019 marked the last year of NEEA's 2015-2019 Business Plan. During the business cycle – pooling resources, creating economies of scale and leveraging the market power of the region – the alliance:

- » Filled the region's energy efficiency pipeline, testing and vetting dozens of emerging technologies and identifying 500 aMW of regional energy savings potential;
- » Delivered measurable change in all of NEEA's strategic markets;
- » Launched the region's first 5-year plan for natural gas market transformation and reported the first natural gas energy savings;
- » Influenced progressively effective building energy codes in all four Northwest states;
- » Completed residential and commercial building stock assessments and coordinated the first region-wide end use load study in 30 years; and
- » Delivered 219 aMW of Co-Created energy savings to the region – enough energy to power more than 160,000 Northwest homes for one year.

Energy efficiency creates jobs, saves money, and increases community resilience. Just as it did during the last great recession, energy efficiency will play a key role in the economic recovery of this region and our clean energy future. We look forward to realizing that future together.

With gratitude to the alliance,



Susan E. Stratton
Executive Director
NEEA



Andrew Grassell
NEEA Board Chair
Chelan PUD



*Energy efficiency saves money, creates family-waged jobs and is the cornerstone of a low-carbon economic development strategy. Those who work in Oregon's energy efficiency industry are critical to ensuring we have an affordable and resilient energy system that is robust for our future. Thank you to the Northwest Energy Efficiency Alliance for its leadership in advancing energy efficiency in Oregon and across the Northwest. — **Kate Brown, Governor of Oregon***



Visit neea.org/annualreport for the complete report.

CYCLE 5 BUSINESS PLAN (2015-2019) RESULTS

REMOVING BARRIERS

To drive permanent market change, the alliance identified and removed key market barriers to energy efficiency throughout the supply chain. Utilities, energy efficiency organizations and market actors each played a crucial role in this process known as *Market Transformation*.



Technical Barriers

The alliance collaborated with technology developers and manufacturers to fast-track the development of emerging technologies, including the first commercially available gas heat pump water heater expected in 2022.



Consumer Barriers

To address consumer needs, the alliance provided the market with research-backed solutions and worked with manufacturers to support product innovations and go-to market strategies. As a result, market adoption of heat pump water heaters and ductless heat pumps more than doubled in Cycle 5.



Product Availability Barriers

Through the Retail Product Portfolio program the alliance partnered with national and independent retailers representing more than 300 retail store locations across the Northwest to increase the availability of efficient consumer products.

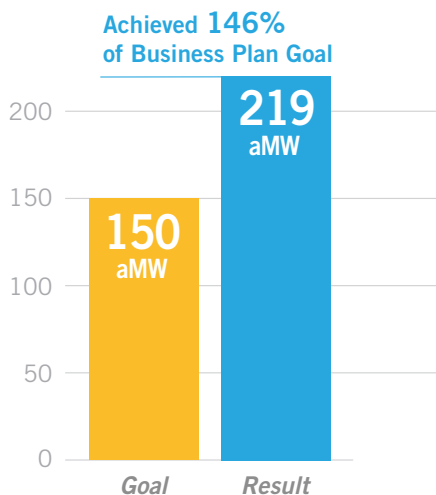


Market Actor Barriers

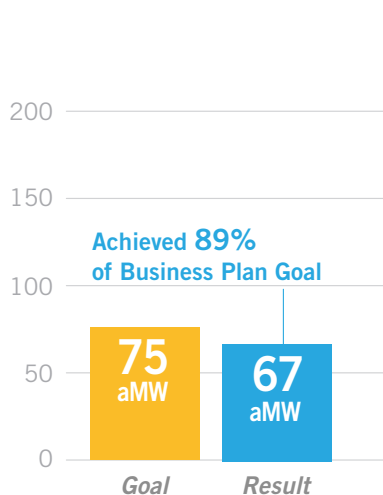
To shift lighting contractors toward more efficient products, the alliance partnered with electrical distributors. In doing so, NEEA built a robust data-gathering tool – the Distributor Platform – that now supports multiple alliance markets and programs.

2015-2019 CO-CREATED* ENERGY SAVINGS

▶ ALL INVESTMENTS (1997-2019)



▶ CURRENT INVESTMENTS (2015-2019)



OTHER METRICS

Avoided CO2 Emissions:

970,000 tons

Levelized Cost:

2.7 cents/kWh

CREATING THE CONDITIONS FOR EFFICIENCY



Locking in Energy Efficiency

Influencing progressively effective energy codes is a key element of NEEA's Market Transformation approach. After establishing more efficient products in the market, NEEA works to bring those technologies or building practices into code. In Cycle 5, this process has led to the adoption of more efficient energy codes in all four Northwest states.



Delivering Market Intelligence

Research conducted by the alliance supports the identification and pursuit of efficiency opportunities. In Cycle 5, NEEA conducted two large-scale building stock assessments and launched the End Use Load Research project - the first of its kind in 30 years - to document how Northwest consumers use energy.



Thank you to our funders and other stakeholders who volunteer their time, talent and resources toward making energy efficiency a cornerstone of a vibrant and sustainable Northwest.



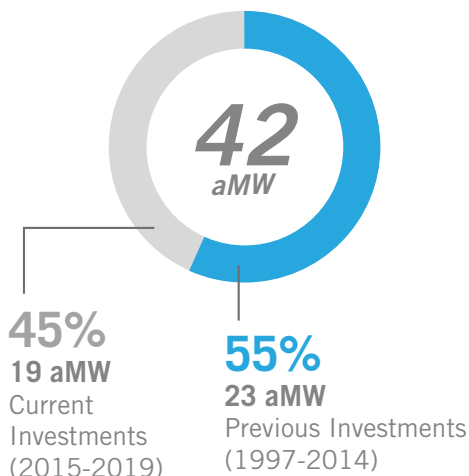
With NEEA at the helm, the Northwest is leading the way for energy efficiency and showing the rest of the country where the industry is headed.

— Tom Zimmer, Sr. Director of Water Heating, GE Appliances, A Haier Company



2019 CO-CREATED* ENERGY SAVINGS

▶ ALL INVESTMENTS (1997-2019)

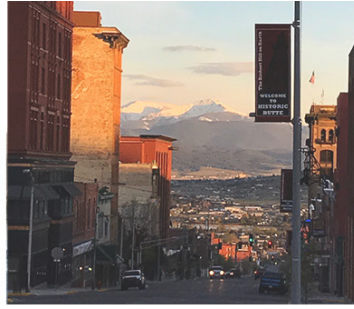


▶ ALL INVESTMENTS BY SECTOR



*All energy savings above baseline that occur in the market due to the combined efforts of utilities, the alliance and other actors.

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421 SW Sixth Avenue, Suite 600 | Portland, Oregon 97204
503-688-5400 | info@neea.org | neea.org