

IL EE Stakeholder Advisory Group: Market Transformation (MT) Savings Working Group Meeting

Tuesday, October 6, 2026

10:00 am – 12:00 pm

Teleconference

Attendees and Meeting Notes

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Meeting Materials

- October 6, 2026 SAG Market Transformation Savings Working Group Meeting
- SAG Facilitator Introduction to October 6 Market Transformation Savings Working Group Meeting
- SAG Facilitator Presentation: Process Proposal for SAG Market Transformation Savings Working Group
- Guidehouse Presentation: ComEd ENERGY STAR Retail Products Platform Natural Market Baseline Revisions

Attendees

Name	Company or Organization
Celia Johnson	Facilitator (Celia Johnson Consulting)
Zoe Knaus	SAG Facilitation Support (Inova Energy Group)
Abigail Miner	Office of the Illinois Attorney General
Andrey Gribovich	DNV
Andy Vaughn	Leidos
Annelise Huber	Guidehouse
Anthony Albano	Resource Innovations
Ariel Crowley	Guidehouse
Arlene Lanciani	Guidehouse
Brad Fortson	ICF
Brady Nemeth	Resource Innovations
Carl Nelson	Center for Energy & Environment
Charles Ampong	Guidehouse
Chidera Kokelu	Ameren Illinois
Courtney Golino	Guidehouse
Danish Murtaza	Peoples Gas & North Shore Gas
David Kilgore	Ameren Illinois

Name	Company or Organization
Elder Calderon	ComEd
Elizabeth Horne	ICC Staff
Erika Ireland	E Source
Erin Daughton	ComEd
Ethan Hyde	Guidehouse
Ian Champs	ComEd
Jasmina Prses	Resource Innovations
Jason Christensen	Guidehouse
Jason Fegley	Leidos
Jeff Harris	Northwest Energy Efficiency Alliance (NEEA)
Jeff Mitchell	Resource Innovations
Jennifer Holmes	Michaels Energy
Joe Van Clock	Apex Analytics
Jonathan Skarzynski	Nicor Gas
Julia Kaplan	Guidehouse
Julia Linder	E Source
Julie Soderna	Energy Solutions
Katrina Choi	ComEd
Kegan Daugherty	Resource Innovations
Kristina Murphy	ComEd
Lauren Bates	Magma Evaluation and E Source
Lilieric Florez Monroy	Peoples Gas & North Shore Gas
Matt Armstrong	Ameren Illinois
Mike Frischmann	Ecometric Consulting
Molly Graham	Midwest Energy Efficiency Alliance (MEEA)
Naveed Khan	Leidos
Neil Curtis	Guidehouse
Nicholas Crowder	Ameren Illinois
Nick Warnecke	Ameren Illinois
Noah Lieb	Apex Analytics
Olivia Sanchez	Resource Innovations
Paul Grimyser	ComEd
Randy Opdyke	Nicor Gas
Rashaan Keeton	Center for Energy & Environment
Rick Tonielli	ComEd
Robert Rusteberg	Ameren Illinois
Rocco Guaragno	Resource Innovations
Seth Craigo-Snell	SCS Analytics
Sidney Daller	Ameren Illinois
Ted Weaver	Dunsky Climate + Energy Advisors, representing Nicor Gas
Tina Grebner	Ameren Illinois

Name	Company or Organization
Zach Ross	E Source

Meeting Notes

See **red text** for follow-up items.

Introduction to SAG Market Transformation Savings Working Group Meeting

Celia Johnson, SAG Facilitator

Purpose of October 6th meeting:

1. To request feedback on a proposed approach for future SG MT Savings Working Group meetings
2. To discuss appliance MT initiative updates for ComEd, including Natural Market Baseline revisions for clothes washers and refrigerators

SAG MT Savings Working Group Process

Celia Johnson, SAG Facilitator

Working Group Background

- Established in 2019 to reach agreement on a framework for market transformation savings; this framework was included in IL-TRM Version 8; since 2019, MT Working Group meetings have focused on discussing MT policy issues, progress on MT initiatives, and MT evaluation
 - **IL-TRM Attachment C:** See Volume 4, Cross-Cutting Measures and Attachment, Attachment C: Framework for Counting Market Transformation Savings in Illinois
 - If edits to Attachment C are needed, edits will be discussed and finalized by the Working Group and shared with VEIC (IL-TRM Administrator) by September 1 each year
 - There are no MT initiative-specific savings protocols documented in IL-TRM Attachment C at this time
 - **Working Group Website:** https://www.ilsag.info/mt_savings_working_group/
 - **Process Protocols:** Illinois market transformation “process protocols” were finalized in 2022 by the Working Group

MT Savings Protocol

- The following is excerpted from Section 2 of the [2022 MT process recommendations document](#):
 - Defined in the May 2022 SAG MT Working Group meeting and updated in the March 2021 SAG MT Working Group meeting, the MT Savings Protocol is the set of components necessary to calculate MT savings. These include, but are not limited to:
 - Logic model
 - Savings per unit
 - Natural market baseline
 - Total market unit data collection
 - Service territory accounting
 - Market progress indicators
 - Duration of any MT savings credit

- Stakeholders in the MT SAG Working Group expressed an interest in providing feedback on MT initiatives and the inputs listed above. The March 2021 SAG MT Working Group meeting outlined the process to reach and document consensus on MT Savings in the IL-TRM, which was defined as follows:
 - Review business plan + data/approach proposal for individual MT initiatives; discuss what information should be included in the IL-TRM (if any)
 - Circulate draft savings protocol to non-financially interested parties for review for comments (15 business days); schedule follow-up discussion, if needed
 - Submit final/consensus savings protocol(s) to IL-TRM Administrator for IL TRM v. 10
- This process meets the needs of the annual IL-TRM review and update process.
- The process recommendations document assumes there will be numerous rounds of review for each MT initiative, which may include discussing and sharing feedback about:
 - Logic Models
 - Savings/Unit
 - Total market unit data collection
 - Natural market baseline data and projections
 - Service territory accounting
 - Market progress indicators
 - The duration of any MT savings credit
- While the Working Group typically meets several times per year, all of the deliverables above have historically not been discussed by this group – doing so could result in a significant number of meetings and many rounds of written comments

Process Proposal

- Suggested approach for future MT Working Group meetings:
 1. Annual meeting (Q1) for IL utilities to give a status update on each MT initiative
 2. Opportunity for IL utilities (or evaluators) to give additional MT-initiative specific update(s) throughout the year, if needed, including any MT component that a utility is interested in feedback on
 3. MT-initiative specific evaluation plan – a draft will be presented for each MT initiative, when ready, with an opportunity for discussion and written feedback
- Are stakeholders interesting in previewing any of the components related to MT savings for a specific MT initiative, or are stakeholders comfortable waiting until the draft evaluation plan is ready?
 - Logic Models
 - Savings/Unit
 - Total market unit data collection
 - Natural market baseline data and projections
 - Service territory accounting
 - Market progress indicators
 - The duration of any MT savings credit

Seth Craigo-Snell: I like this idea. The items discussed in the third point may already be included in business plans, rather than an evaluation plan.

- *Lauren Bates (via chat): I agree – many of these elements are part of the business plan, at least for Ameren.*

- *Celia Johnson: Thank you. Business plans may be a better reference than evaluation plans. I will review this.*

Abigail Miner (via chat): The natural market baseline is important to establish in advance of draft evaluations.

Request for Feedback

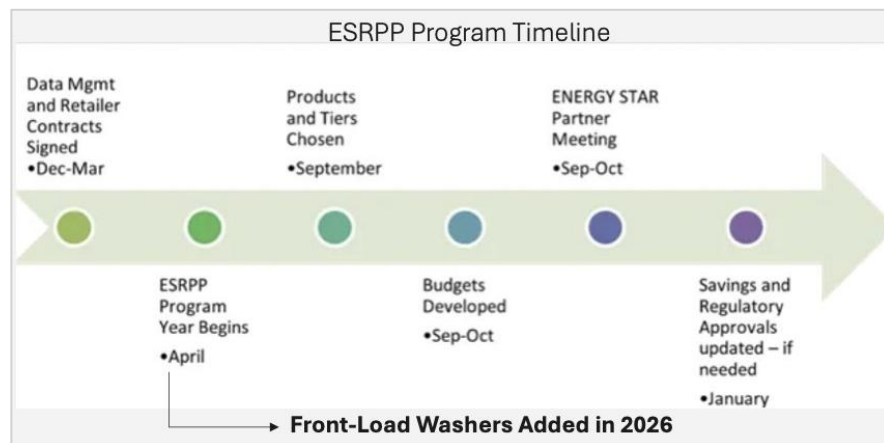
- Feedback on the proposed approach for future SAG MT Savings Working Group meetings **due by Wednesday, October 21**
 - A written comment template will be circulated
 - Comments will be posted on the MT Savings Working Group page and circulated to the distribution list

ComEd Update: Appliance MT Initiatives

Ariel Crowley, Guidehouse

Program Background

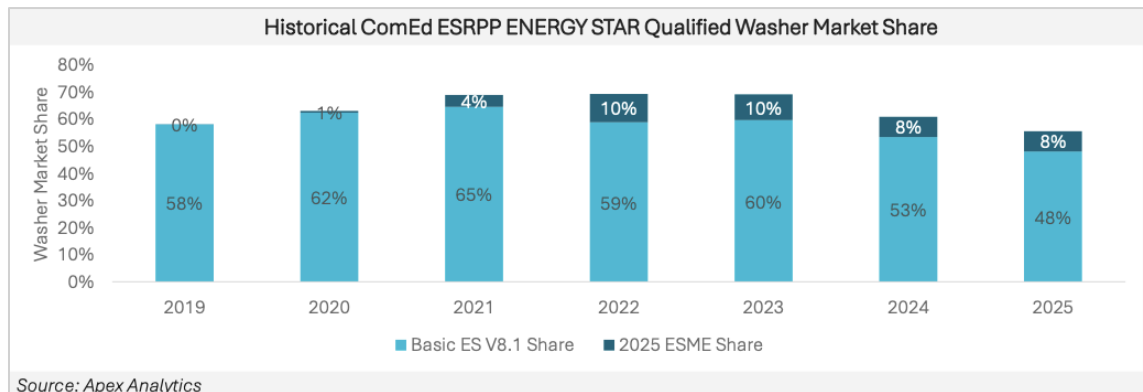
- Energy STAR Retail Products Platform Program (ESRPP)
 - ESRPP is a national collaborative midstream initiative across 15 states and 17 utilities
 - Kickstarted in 2016
 - ComEd joined in 2020 (as a pilot program)
 - Facilitated nationally by Northwest Energy Efficiency Alliance (NEEA)
 - NEEA is also the former implementor of ComEd's ESRPP
 - The ESRPP and PY timelines do not align – can lead to mid-year NMB revisions that apply to current year
 - ComEd PY: January 1st – December 31st
 - National ESRPP PY: April 1st – March 31st



Clothes Washers NMB Revisions

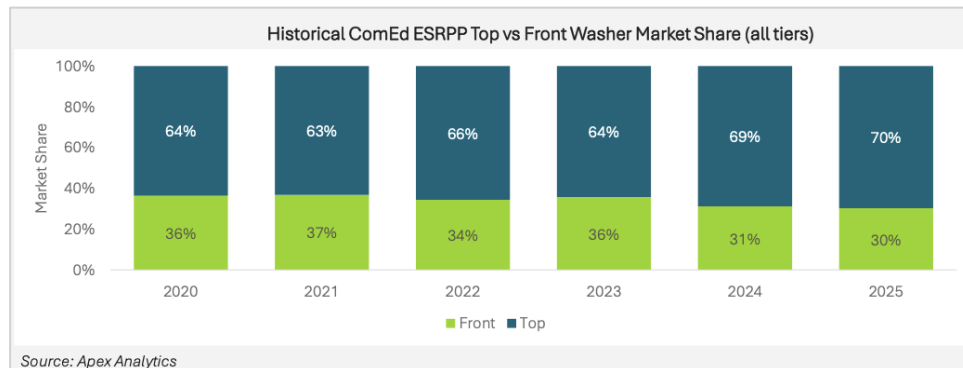
- Measure: Top and Front Load Clothes Washers
 - In April 2026, ComEd introduced incentives for ES v8.1 and ESME front-load clothes washers. Previously, ComEd only incentivized top-load clothes washers, which were historically all categorized to the ES v8.1 tier.
 - The revision to the clothes washers NMB is supported by two criteria listed in IL TRM Attachment C:

- ENERGY STAR Clothes Washes in the Market

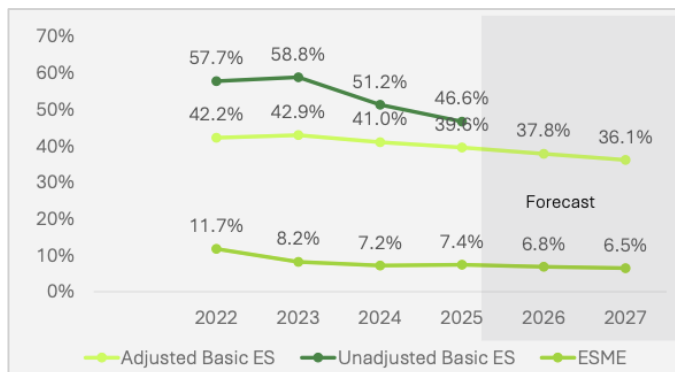


- Even with declining ENERGY STAR market share, market share between top and front load has remained stable

- Front-load washers entered the U.S. consumer market in the early 2000s and grew rapidly through the 2000s. After some backlash with mold issues, market share of front-loaders has since stabilized at ~30% of total washer sales.



- Combined Clothes Washers NMB Revision
 - The revision is designed to accommodate the distinct dynamics of clothes washers only over the next few years, including:
 - Observed trends in top-load ENERGY STAR market share
 - Structural difference between top-load and front-load qualification rates
 - Looming compliance date for the 2028 federal standard update
 - Historical top-load data was adjusted by evaluated ESRPP program influence to develop a linear trend projection for 2026 and 2027



Year	Original Top-Mount ESv8.1/ESME NMB	NEW Combined ESv8.1 NMB	NEW Combined ESME NMB
2025	24.4%	39.6%	7.4%
2026	24.4%	37.8%	6.8%
2027	24.4%	36.1%	6.5%

Bottom-Mount Refrigerators NMB Revisions

- Measure: ETA Bottom-Mount Refrigerators
- ComEd introduced the Bottom-Mount (BM) ENERGY STAR Emerging Technology Award (ETA) efficiency tier to ESRPP. The team utilized the 2020 and 2021 ETA qualified product lists (QPLs) to assume continued growth in market share and develop the initial NMB. Then, starting in 2022 the QPL was no longer updated for BM refrigerators.
- The revision to the bottom mount refrigerator NMB is generally supported by three criteria listed in IL TRM Attachment C:
 - 1. Key assumptions underlying the initial forecast have proven to be incorrect; AND 2. The timing of key anticipated events has changed.
 - In 2020 and 2021, the EPA offered an ETA for models with advanced adaptive compressors. The NMB assumed that EPA would allow for continued tracking of this tier of product. However, after the ETA for advanced adaptive compressors ended in 2021, the EPA no longer

updated a QPL of refrigerators using the technology. Ongoing ENERGY STAR and federal reporting requirements do not allow for qualification under the alternate test procedure, nor do they identify models with advanced adaptive compressors.

- 4. Significant improvements in the availability of sales data demonstrate that the initial forecast can be improved without introducing a significant risk of over- or under-estimating program impacts.
 - It is not currently feasible to systematically identify new ETA refrigerator models that have entered the market since 2021, making it nearly impossible to effectively assess market progress against the existing baseline.
 - Guidehouse interprets that the deterioration of data quality, inverse of improvement, also warrants updates to the NMB forecast.
- **ETA Bottom-Mount NMB Revisions**
 - The revised NMB is based upon a model of decay in ETA market share that is likely to occur through natural product turnover.
 - The model is built upon a decay rate from a random sample of refrigerator models between 2021 and 2025 as seen in the ESRPP data
 - The forecast only extends through 2028 as a federal standard update is expected in 2029.
 - Guidehouse recommends updating the NMB within one year of any reporting, testing, or standards changes that could impact market share.
 - If EPA or ENERGY STAR later adopt test procedures or reporting requirements that make these models identifiable it may result in a notably higher market share for ETA-qualified models that is not attributable to ESRPP

Year	Original NMB	Updated NMB (CY25)	NEW Updated NMB (CY26)	Evaluated Market Share
2022	24%	24%	23%	40%
2023	24%	23%	17%	29%
2024	24%	22%	4%	7%
2025	24%	21%	2%	4%
2026	24%	21%	2%	-
2027	27%	20%	1%	-
2028	33%	19%	0%	-

- **Product Definitions**

Product	Configuration	Tier	Criteria	Qualified Products List (QPL)
Clothes Washers	Top-Load Front-Load	ENERGY STAR v8.1	Link	Link
Clothes Washers	Front-Load	ENERGY STAR Most Efficient (ESME)	Link	Link
Refrigerators	Bottom Mount	ENERGY STAR Emerging Technology Award (ETA)	Link	Link

Lauren Bates (via chat): Would it be possible to provide the full product definitions with the slides when you share them?

- Ariel Crowley: *Yes, we can do that.*
 - Facilitator's Note: The slides linked on page 1 include definitions.

Closing and Next Steps

Celia Johnson, SAG Facilitator

Next Steps

- There are no additional SAG Market Transformation Savings Working Group meetings scheduled this year.
 - Reach out to Celia Johnson (Celia@CeliaJohnsonConsulting.com) if an additional meeting during Q4 is needed.
 - The 2027 SAG Plan is in development and will be presented to the Large Group SAG in early January.

Request for Feedback – Due Wednesday, October 21

1. There is an opportunity for feedback on the SAG Facilitator's Market Transformation Working Group process proposal. [Click here for the MT Working Group Process Proposal Comment Template.](#)
2. There is an opportunity for feedback on the ComEd ENERGY STAR Retail Products Platform (ESRPP) Natural Market Baseline (NMB) revisions. [Click here for the ComEd ESRPP NMB Revision Comment Template.](#)