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# SAVE ON ENERGY INSTANT DISCOUNTS PROGRAM

## PROGRAM REQUIREMENTS

### 1. PROGRAM DESCRIPTION

This Save on Energy Instant Discounts Program (the "**Program**") provides incentives to eligible distributors of Energy Efficient ("**EE**") lighting equipment in order to accelerate market transformation by increasing EE technology adoption. It is intended that Participating Distributors utilize the incentives to provide instant point of sale discounts on eligible EE lighting equipment, address the administrative costs of Program participation and influence the end-use commercial and industrial customers to purchase eligible EE lighting equipment through marketing and promotion.

This Program is offered and administered by the Independent Electricity System Operator (the "**IESO**") and its Program Delivery Agent under the 2021-2024 Conservation and Demand Management ("**CDM**") Framework.

These Program Requirements are effective as of December 18, 2023.

### 2. PROGRAM INCENTIVES

Subject to meeting the eligibility requirements set out in Section 3, Participating Distributors are eligible to receive Distributor Incentives for the sale of the Eligible Measures.

### 3. PROGRAM ELIGIBILITY CRITERIA

#### 3.1 DISTRIBUTOR ELIGIBILITY

Participating Distributors must:

1. Be in the business of distribution sales (for certainty, this Program is intended to incentivize distributors, not contractors, as the initial point of sale);
2. Have the ability to track and report required Program data, including sales data for product SKUs incented by the program, including:

- a) Historical sales data for same product SKUs and/or related product SKUs, of sufficient detail and timeframe to understand program influence; and
  - b) Forecasting of sales of eligible measures for budgeting purposes
3. Be able to sell Eligible Measures to end-use customers and contractors.

## **3.2 END-USE CUSTOMER ELIGIBILITY**

Participating Distributors are required to confirm end-use customer eligibility to ensure that Eligible Measures are sold only to eligible end-use customers. An eligible end-use customer must be the owner and/or operator and/or employee of the following Facility types:

1. Commercial spaces or buildings, such as offices, retail and grocery stores, restaurants, hotels and warehouses;
2. Industrial buildings in sectors such as food and beverage, automotive, plastics, steel, mining, paper and chemical industries;
3. Institutional buildings, including hospitals, schools, universities, government buildings, municipal facilities;
4. Multi-family buildings, such as apartments (including social housing) or condominiums (for clarity, this applies to common areas in multi-family buildings, and not for residential in-suite areas); or
5. Agricultural facilities, including dairy, swine and poultry farms, greenhouses and nurseries.

Additionally,

- Incented lighting products must be installed in Ontario, in a single facility, connected to, or behind the meter of, an electricity consumer connected to the IESO-Controlled Grid or a Distribution System;
- Incented lighting products must not be installed in New Construction projects. These projects must not be in relation to the construction of a new facility, a new addition to an existing facility, a major renovation that converts the building to another use, or a major renovation which results in the facility being unfit for occupation for a minimum of 30 days and in the replacement of at least two building systems; and
- An eligible end-use customer must not have received any other financial incentives for the applicable Eligible Measures purchased under this Program from any other program or initiative funded by the IESO or the Government of Ontario.

### 3.3 MEASURE ELIGIBILITY

Eligible Measures include general-purpose and specialty Energy Star or Design Lights Consortium (DLC) qualified lighting products. The Eligible Measures are listed in Appendix A — Eligible Measures List.

The Participating Distributors must, upon request, provide to the IESO copies of the list of EE lighting products to be sold as Eligible Measures, as well as the corresponding listing under the Energy Star or Design Lights Consortium.

Participant Distributors are required to ensure that all specific EE lighting products intended to be offered under the Program are:

1. Eligible Measures, as approved by the IESO;
2. Legal for sale under Applicable Law, meeting applicable code(s), standard(s) and regulatory requirement(s), including, but not limited to, the Canadian Electrical Code issued by the Canadian Standards Association, and/or "cUL" designation as provided from the Canadian branch of the Underwriter Laboratories; and
3. Listed under the Energy Star or Design Lights Consortium.

## 4. DISTRIBUTOR OBLIGATIONS

Participating Distributors are responsible for complying with the Program processes set forth in their Participant Agreement with the IESO.

For Eligible Measures sold that are listed in Appendix A — Eligible Measures List, each Participating Distributor must pass on a minimum of 60% of the corresponding Incentive Amount.

In addition, Participating Distributors must:

1. Display the pass-through incentive as a line item on the customer sales invoice. The line item must specify "Save on Energy Instant Discounts".
2. Provide to the IESO copies of customer sales invoices for all eligible sales upon request.
3. Request that purchasing contractors show the customer incentive amount received for qualified products and equipment to the end-customer, and document the customer incentive amount on their invoice to the end-customer as "Save on Energy Instant Discounts".

4. If a line item cannot be displayed on the customer's invoice, the Participating Distributor must inform the IESO to determine an alternative solution.
5. Collect purchasing contractor and/or end-use customer information (as listed in Appendix B — Sales Data List), in accordance with Applicable Law, and provide this information to the IESO for Program evaluation upon the IESO's request. Collection activities include:
  - a. collecting information listed in Appendix B at the point of sale;
  - b. obtaining consent from the purchasing contractor/end-user customers to, for the purposes of Program evaluation:
    - i. share this information with the IESO, and/or;
    - ii. be contacted by the IESO regarding this information, and;
  - c. sharing with purchasing contractors/end-user customers ways to provide the IESO directly with information and feedback regarding the Program, such as IESO contact information (which the IESO will provide to the Distributors).
6. Each unit sale must involve a minimum customer contribution (as specified for each Eligible Measure set out in Appendix A – Eligible Measures List).

## 6. PROGRAM SPECIFIC DEFINITIONS

The following terms have the meaning stated below when used in these Program Requirements:

***2021-2024 Conservation and Demand Management Framework*** means the framework established by the 2020 Ministerial Directive issued September 30, 2020 pursuant to which the IESO is to design, coordinate, deliver, and/or fund the delivery of electricity conservation and demand management programs under the Save on Energy brand.

***Applicable Law*** means any domestic law, rule, statute, subordinate legislation, regulation, by-law, order, ordinance, protocol, code, guideline, treaty, policy, notice, direction or judicial, arbitral, administrative, ministerial or departmental judgment, award, decree, treaty, directive, or other requirement or guideline published or in force at any time during the Term which applies to or is otherwise intended to govern or regulate any person (including any party to a Participant Agreement with the IESO), property, transaction, activity, event or other matter, including any rule, order, judgment, directive or other requirement or guideline

issued by any governmental authority, including any privacy laws such as the *Personal Information and Protection of Electronic Documents Act* (Canada) and the *Freedom of Information and Protection of Privacy Act* (Ontario).

***Distributor Incentives*** means, in respect of the Program, the incentives paid or payable to eligible Participating Distributors, as approved by the IESO and calculated in accordance with the Eligible Measures List.

***Eligible Measure*** means any measure listed in the column titled “Eligible Measures” on the “Efficient Measure List” worksheet in the Eligible Measures List.

***Eligible Measures List*** means the list of Eligible Measures attached as Appendix “A”, which may be updated from time to time by the IESO in its sole discretion.

***HST*** means the harmonized sales tax payable pursuant to the Excise Tax Act, R.S.C. 1985, c. E-15.

***Facility*** means a building structure where Measures are installed. For further clarity a Facility must be a single facility, connected to, or behind the meter of, an electricity consumer connected to the IESO-Controlled Grid or a Distribution System, provided that a Facility may be located within or upon a building, but may also be a structure other than a building, such as a freestanding billboard or mining shaft.

***IESO*** has the meaning given to it in Section 1.

***IESO-Controlled Grid*** has the meaning given to it in the IESO Market Rules.

***IESO Market Rules*** means the rules made under Section 32 of the Electricity Act, 1998 (Ontario), together with all market manuals, policies, and guidelines issued by the IESO or its successor.

***Lighting System*** means light bulbs, lighting fixtures, exit signs and LED strips.

***New Construction*** for the purpose of the 2021-2024 CDM framework, “New Construction” projects includes new building systems, extension of existing buildings, extensive renovation and change of major occupancy as defined in the Ontario Building Code.

***Occupancy Lighting Control System*** means a standalone lighting control system consisting of occupancy sensors, vacancy sensors and/or day lighting sensors.

***Participant Agreement*** means any one or more agreements or terms and conditions with the IESO that a Participating Distributor must enter into or agree to be bound by in order to be eligible to participate in the Program.

***Participating Distributor*** means, in respect of the Program, a person who meets the eligibility requirements to participate in the Program set out in Section 3.1 and is party to a

Participant Agreement with the IESO. For certainty, distribution contractors are eligible to participate.

***Pass Through Incentive*** means the percentage of the Distributor Incentive that must be provided (or “passed through”) to the end-use customer.

***Program*** has the meaning given to it in Section 1.

***Program Delivery Agent(s)*** means the service provider(s) under contract with the IESO to provide program delivery services for the Program.

***Program Requirements*** means the terms and conditions contained herein governing the Program.

***Sales Data List*** means the list of data fields attached hereto as Appendix “B”, which may be updated from time to time by the IESO in its sole discretion.

**APPENDIX "A"**  
**ELIGIBLE MEASURES LIST**

Conservation Measure Category	Distributor Incentive	Minimum Customer Contribution
4' T5 LED TUBE REPLACEMENT (UL TYPE A) <sup>1</sup>	\$2.00	\$1.00
4' T5 LED TUBE REPLACEMENT (UL Type B) <sup>1</sup>	\$2.00	\$1.00
4' T5 LED TUBE REPLACEMENT (UL Type C) <sup>1</sup>	\$6.00	\$3.00
4' T5HO LED TUBE REPLACEMENT (UL TYPE A) <sup>1</sup>	\$4.00	\$2.00
4' T5HO LED TUBE REPLACEMENT (UL Type B) <sup>1</sup>	\$4.00	\$2.00
4' T5HO LED TUBE REPLACEMENT (UL Type C) <sup>1</sup>	\$8.00	\$4.00
4' T8 LED / LED U-Bend Lamp (Type A) <sup>2</sup>	\$2.00	\$1.00
4' T8 LED / LED U-Bend Lamp (Type B) <sup>2</sup>	\$2.00	\$1.00
4' T8 LED / LED U-Bend Lamp (Type C) <sup>2</sup>	\$4.00	\$2.00
8' LED LINEAR AMBIENT FIXTURES <sup>3</sup>	\$18.00	\$10.00
8' T8 LED Lamp <sup>4</sup>	\$4.00	\$2.00
INTEGRAL LED FIXTURE <sup>5</sup>	\$14.00	\$5.00
INTEGRAL LED TROFFER & LED LINEAR AMBIENT FIXTURE <sup>5</sup>	\$18.00	\$10.00
INTEGRAL LED TROFFER & LINEAR AMBIENT RETROFIT KITS <sup>6</sup>	\$11.00	\$10.00
LED HIGH/LOW BAY FIXTURE ( ≤ 12,200 lumens) <sup>7</sup>	\$75.00	\$20.00
LED HIGH/LOW BAY FIXTURE (>10,000-34,700 lumens) <sup>7</sup>	\$90.00	\$30.00
LED HIGH/LOW BAY FIXTURE (> 34,700 lumens) <sup>7</sup>	\$140.00	\$40.00
LED RECESSED DOWNLIGHTS <sup>8</sup>	\$14.00	\$2.00
LED REFLECTOR (FLOOD/SPOT) LAMP PIN & SCREW BASE <sup>9</sup>	\$4.00	\$2.00
REFRIGERATED DISPLAY CASE LED FIXTURE - HORIZONTAL (UNDERSHELF) INSTALLATION <sup>10</sup>	\$7.00	\$5.00
REFRIGERATED DISPLAY CASE LED FIXTURE - VERTICAL INSTALLATION <sup>10</sup>	\$9.00	\$5.00

1. Lamps must be approved and listed on the Design Lights Consortium (DLC) Qualified Product List (QPL) and categorised as T5 Four-Foot/T5HO four-foot linear replacement lamps (UL Type A, B, C). UL Type B tubes only accepted if certified and listed under UL 1598c or C22.2 standards and known as "double ended".
2. Lamps must be approved and listed on the DLC QPL and categorised as T8 four-foot linear replacement lamps (UL Type A, B or C only). UL Type B tubes only accepted if certified and listed under UL 1598c or C22.2 standards and known as "double ended".
3. Lamps must be approved and listed on the DLC QPL and categorised as indoor luminaire – linear ambient, and the product must be approved and listed on the DLC QPL.
4. Lamps must be approved and listed on the DLC QPL and categorised as T8 four-foot linear replacement lamps or U-Bend replacement lamps (UL Type A, B or C only). UL Type B tubes only accepted if certified and listed under UL 1598c or C22.2 standards and known as "double ended".
5. The product must be categorized by the DLC QPL as indoor luminaires – troffers or indoor luminaires – linear ambient and the product must be approved and listed on the DLC QPL.
6. The product must be categorized by the DLC QPL as indoor retrofit kit - troffer or indoor retrofit kit – linear ambient, and the product must be approved and listed on the DLC QPL.
7. The fixture must be listed and approved by the DLC and categorized as low-bay luminaires or as high-bay luminaires. retrofit kits are not eligible.
8. The product must have a fixture type classification of downlight recessed, or downlight solid state retrofit, or ceiling mount and pendant, or wall mount by Energy Star and must be approved and listed on the Energy Star qualified commercial lighting list for fixtures.
9. This measure is applicable to pin and/or screw base BR's, PAR's, MR's and R's style LED lamps. The LED lamp must be classified as a reflector (flood/spot) lamp by Energy Star and must be approved and listed on the Energy Star certified light bulbs list.
10. The fixture must be approved and listed on the DLC QPL and categorized as horizontal or vertical refrigerated case luminaire. Retrofit kits and replacement lamps are not eligible for this incentive.



**APPENDIX "B"**  
**SALES DATA LIST**

Data Points	Required Data	Data Type
Contractor Company	Yes (if purchased by contractor)	Character
Contractor first name, last name	Yes (if purchased by contractor)	Character
Contractor address	Yes (if purchased by contractor)	Alphanumeric
Contractor City	Yes (if purchased by contractor)	Character
Contractor Province	Yes (if purchased by contractor)	Character
Contractor Postal Code	Yes (if purchased by contractor)	Alphanumeric
Contractor Email	Yes (if purchased by contractor)	Alphanumeric
Contractor Phone	Yes (if purchased by contractor)	Numeric
Customer first name, last name	Yes	Character
Customer company name	Yes	Character
Customer installation address	Yes	Alphanumeric
Customer installation City	Yes	Character
Customer installation Province	Yes	Character
Customer installation Postal Code	Yes	Alphanumeric
Customer Email	Yes	Alphanumeric
Customer Phone	Yes	Numeric
Installation Business sector (building type)	Yes	Defined list
Invoice Number	Yes	Numeric
Distributor store ID	Yes	Character
Distributor Contact Salesperson Name	Yes	Character
SKU number	Yes	Alphanumeric
Measure Category	Yes	Defined list
Transaction Date	Yes	Numeric
Quantity	Yes	Numeric
Sale price (without incentive)	Yes	Numeric
Customer Incentive amount	Yes	Numeric
Is sale intended for new construction projects	Yes	Character