The 2025 Energy Efficiency Programs Report

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Efficiency Canada | Carleton University

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About Efficiency Canada

Efficiency Canada is the national voice for an energy-efficient economy. Our mission is to create a sustainable environment and better life for all Canadians by making our country a global leader in energy efficiency policy, technology, and jobs. Efficiency Canada is housed at Carleton University's Sustainable Energy Research Centre, which is located on the traditional unceded territories of the Algonquin nation.

The views expressed, as well as any errors or omissions, are the sole responsibility of the authors.

Highlights

This is Efficiency Canada's second biennial energy efficiency programs report, produced in alternating years to our Scorecard report. The Programs Report provides a detailed picture of utility demand-side management activities across Canada. This includes benchmarking the most recent year's portfolio spending and energy savings, energy efficiency targets, peak demand reductions, and outcomes for low-income programs and programs for Indigenous communities. This report's benchmarking period (2024) covers January to December 2024 for utilities reporting on a calendar year basis or April 2024 to March 2025 for those on a fiscal year basis.

We produce this report primarily as a "state of the sector" survey, and not for the purpose of policy analysis or recommendation. Though we benchmark performance using industry-standard metrics, we do not assign scores to utilities as in our Scorecard. We also do not evaluate provincial policies and regulations that influence these results. This is intended largely as an information resource to energy efficiency sector stakeholders, including utility program administrators, program implementers, provincial government policymakers, energy efficiency experts and advocates.

This year's report also includes results from jurisdictional scans of demand flexibility initiatives and equity-oriented programs across Canada. Demand flexibility initiatives encompass both utility programs (e.g., demand response) and rate packages. Equity-oriented programs include those serving income-qualified households, social housing, and northern, remote, and First Nations, Inuit, and Métis communities. We conducted these scans as part of a larger Natural Resources Canada-funded project at Efficiency Canada on the modernization of utility demand-side management. These scans may not be regularly updated in future Programs Reports.

Findings

Currently active demand-side management plans constitute $5.8 billion in total committed investment and could deliver 69 petajoules of incremental energy savings over the years they are in place. This is approximately equivalent to 5 per cent of all annual residential energy use in Canada. Utilities in some provinces recently announced substantial increases in future demand-side management budgets and savings targets. This includes the Independent Electricity System Operator (IESO)'s 12-year, $10.9-billion

eDSM framework and Hydro-Québec's 10-year, $10-billion plan. BC Hydro filed a plan in April with a budget of over $500 million for 2026 and 2027. In the next year, Efficiency Nova Scotia and Enbridge will need to file new long-term plans as well.

At the portfolio level, utilities exceeded their program budgets by approximately 20 per cent in 2024, spending just over $2 billion and saving over 25 petajoules of energy. According to Efficiency Canada data collected through the Scorecard, this represents a nearly twofold increase in year-over-year program spending from the same selection of program administrators. The biggest increases in spending came from the IESO and Hydro-Québec, which both recorded 153 per cent increases, followed by NB Power (117 per cent increase) and Enbridge (109 per cent increase). These four utilities accounted for roughly $840 million of the additional spending in 2024 over 2023. A considerable portion of spending increases for Hydro-Québec and Enbridge was driven in part by successful incentive programs for electric heat pumps.

Our jurisdictional scan of utility demand flexibility initiatives identified 30 programs and at least one form of load-shifting rate schedule in each province. We identified dynamic pricing rate structures (e.g., critical peak pricing, real-time pricing) in only two provinces: Québec and Nova Scotia. British Columbia and Ontario led in the number of separate programs. Of the programs we identified as utilizing a specific technology, smart thermostats were the most common, followed by electric vehicles. Our benchmarking of 2024 results indicates that utility energy efficiency programs achieved 461 MW of peak demand reductions, and demand flexibility initiatives resulted in 671 MW of available capacity.

Our jurisdictional scan of equity-oriented utility demand-side management initiatives identified 76 programs. This includes 36 programs for low- to moderate-income Canadians, 25 programs for Indigenous communities, 11 for affordable housing providers, and four for other underserved and/or marginalized populations. The most common type of program identified in our scan was direct-install programs that offer major upgrades, though these make up a small fraction of all programs (20 out of 76). While we found a greater number of major upgrade programs for northern, remote, and Indigenous communities (11 in total), there is wider geographic availability of these programs for low-income households. Our performance benchmarking finds utilities spent $338 million on equity-oriented programming in 2024, accounting for approximately 17 per cent of total portfolio spending nationwide.

Introduction

Efficiency Canada's Energy Efficiency Scorecard identifies and evaluates provincial and territorial energy efficiency policies and initiatives across five policy areas: programs, enabling policies, buildings, transportation and industry. In doing so, we aim to: a) provide insight into the current state of the energy efficiency sector; b) create a resource for energy efficiency stakeholders to compare and contrast policies and policy impacts; and c) promote some friendly competition among provinces and territories to increase their energy efficiency ambitions.

We published the Scorecard annually from 2019 to 2022, before switching to biennial publication and supplementing it with a shorter report in the off-years focused only on energy efficiency programs. This is the second issue of that supplemental report, covering programs delivered between January 2024 and March 2025.[1]

Unlike in our previous Programs Update report or in the Scorecard, we have chosen to focus primarily on activities carried out within the umbrella of utility-administered demand-side management (DSM). As a result, this represents a slightly smaller portion of the entirety of provincial and territorial-level energy efficiency programming captured in our fuller Scorecard report. The structure of our reporting also differs from previous reports. While we have included 2024 performance benchmarking for metrics found in these other reports, they are supplemented by high-level summaries of current DSM plan budgets and savings targets.

For this report, we are pleased to supplement the review of utility DSM plans and programs with the results of jurisdictional scans we have conducted of equity-oriented (i.e., low-income programs and programs for Indigenous communities) and demand flexibility (e.g., demand response (DR) and DR-enabling incentive-based) program activities. This in-depth review of program activities is supported by funding from Natural Resources Canada and is not typically carried out through our Scorecard-related tracking efforts.

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[1] This 15-month period encompasses the most recent 12-month period for utilities that operate on a calendar year basis (January 1–December 31, 2024), as well as those on a fiscal year basis (April 1, 2024–March 31, 2025). One utility (Énergir) has a fiscal year that runs from October 1, 2023–September 31, 2024.

Methodology

This report comprises three main sections, each with unique methodological considerations:

1. Review of utility DSM plans and portfolio benchmarks
2. A jurisdictional scan of demand flexibility initiatives
3. A jurisdictional scan of equity-oriented programs

Each section provides further details on the types of activities considered and how these are defined. In this section, we explain the broader distinction between DSM programming and activities "outside" of DSM, which underpins the report's structure. For a list of program administrators captured in this report, see Appendix B.

Interpreting utility demand-side management

As noted above, the focus of this report is *primarily* on utility-administered DSM activities — a narrower scope than in our full Scorecard report, which also includes programs administered directly by provincial governments. Indeed, the first section considers *only* utility DSM activities; the jurisdictional scans that form the basis for the latter two sections were broader than just utility DSM, though we distinguish in our reporting between activities falling in or outside DSM.

However, what exactly it means to be in or outside of DSM, what it means to "administer" DSM, and what we consider a "utility" can all be ambiguous. While no conceptual or organizational scheme is airtight, our reasoning is as follows:

- An activity is part of DSM if its scope, budget and performance objectives are established as part of a multi-year DSM plan, typically submitted to and approved by a provincial utility regulatory board.
- A DSM plan comprises a varying range of activities the entity that prepared it plans to deliver (directly, or via third parties), principally for the purposes of

resource acquisition. The activities are funded wholly or in large part by utility ratepayers and subject to cost-effectiveness testing.[2]

- An entity administers a DSM plan by preparing it; allocating resources to deliver specified activities; carrying out evaluation, measurement, and verification activities necessary for reporting on achievements; and reporting to relevant stakeholders on the outcomes.
- Across Canada, utilities are the principal entities administering DSM activities, though exceptions exist. Efficiency Manitoba, Efficiency Nova Scotia,[3] and efficiencyPEI, for example, all prepare and submit DSM plans (supported by ratepayer funding) to provincial regulators.
- Some of these program administrators deliver programming alongside DSM programs, but not using ratepayer funds (e.g., Efficiency Nova Scotia's non-regulated fuel programs). Unless they are included in DSM plans or reported on in annual DSM performance reports, these activities are not included in the first section below.
- Our priority focus is on large utilities with a mandate to pursue utility DSM, a demonstrated history of active DSM planning and programming, and a comprehensive mix of DSM offerings (e.g., energy efficiency programs, demand response, and enabling activities). We recognize that this may exclude some activities from program administrators in the territories, as well as smaller, regional/local utilities in some provinces.

Data collection on DSM plans and annual performance occurred primarily through public reporting, typically in regulatory proceedings. In select cases, we sent short

[2] We are reasonably confident DSM plan budgets and annual spending figures presented below are ratepayer only, but we are unable to confirm whether funds from other sources are included for each utility. NB Power is one clear exception that explicitly notes multiple funding sources in its current DSM plan.

[3] As the current Efficiency Nova Scotia franchise holder, EfficiencyOne submits and administers the DSM plan.

information requests to acquire data on DSM plans and annual performance due to an absence of public reporting.[4]

The timeline and methodology for the jurisdictional scans differ and are explained in greater detail in the relevant sections. In these scans, we have endeavoured to distinguish between activities included as part of a DSM plan identified and reported on in the first section and those that are not part of a DSM plan.

Implications for scope and limitations

The focus of the first section of this report is, as noted, utility DSM initiatives. This does not encompass all program support for energy efficiency or other demand-side measures in Canada. We have largely excluded programs offered by federal and provincial governments, smaller regional or local utilities, and third-party agencies. Programs administered by utilities but not supported by ratepayer funds are also largely excluded. Exceptions to these qualifications in our analysis below are noted in footnotes.

[4] In most cases, this was because annual reporting was not yet available. Such program administrators included Efficiency Manitoba, IESO, NB Power and efficiencyPEI. All data for Saskatchewan utilities came via information request as there is no regulatory board that approves DSM activities.

Utility demand-side management

Utilities administer the bulk of energy efficiency and demand response programming across Canada.[5] These programs are typically part of a utility's demand-side management (DSM) plan, which is an integral component of the broader processes of short- and long-term utility resource planning. The scope and duration of utility DSM plans vary across the country but typically include both energy efficiency and supporting initiatives (like education, marketing, and research and development) and cover a period of around three years.

Importantly, DSM plans often establish budgets and performance targets for utilities to meet. These targets may be subject to regulatory oversight and stakeholder intervention but are principally influenced by utility long-term resource planning and, where applicable, provincial policy. Some provinces have established long-term energy efficiency resource standards that require the program administrator to hit a targeted energy efficiency savings rate — usually defined by the ratio of annual energy savings to utility annual domestic energy sales to end users (e.g., Manitoba, New Brunswick). Others have introduced legislation to prioritize demand-side resources in utility long-term planning (e.g., British Columbia), and others have close (though opaque) budget or target-setting arrangements between the provincial government and the program administrator (e.g., Ontario).

Tracking the development and progress of these plans and benchmarking annual performance thus gives insight into how different provinces are prioritizing energy efficiency in their climate and energy planning. This can highlight emerging trends in administration and governance of utility DSM. While Scorecard reports have treated energy efficiency targets and program performance in separate sections, this report brings them together, focused squarely on the level of the DSM plan and portfolio results. Below, we provide a quick snapshot of current DSM plans across Canada with

[5] Some provincial/territorial governments administer programs directly, as do some third-party organizations. Some provinces have dedicated organizations to administer energy efficiency programs that may be more or less separate from government. Some utilities fund programming entirely through their ratepayers, while some rely on multiple sources of funding. There is only one province (Alberta) where utilities do not do DSM, and no utilities in the territories do DSM.

some discussion of recent developments, as well as portfolio-level benchmarking of 2024 performance.

Current plans

Efficiency Canada tracks DSM plan development and reporting for most Canadian utilities as part of our long-running Scorecard project (some smaller municipal or regional utilities are not included in this effort). Presently, no utility in Alberta has DSM plans or activities. Utilities in Saskatchewan do not publish DSM plans or performance reports but do administer efficiency programs.

The tables below provide summary information of current DSM plans for the utilities included in our tracking. Excluded from these totals are provincially administered or supported efficiency programs, often targeting non-regulated fuels like propane or heating oil; programs administered by small municipal or regional distribution utilities; and investment and targeted savings by efficiency program administrators in the territories.

Table 1. Current utility DSM plans

Utility	Plan start	Plan period (years)	Total plan budget ($M)	Total plan incremental energy savings
Electricity				GWh
BC Hydro†	April 2025	2	539.8	1,435.0
Efficiency Manitoba*†~	April 2020	6	296.7	2,023.0
Efficiency Nova Scotia*§	January 2023	4	236.8	488.5
efficiencyPEI	March 2023	3	24.5	34.5
FortisBC	January 2023	5	82.6	143.4
Hydro-Québec	January 2023	3	1,037.6	2,596.0
IESO	January 2025	3	1,800.0	4,636.0
NB Power‡¶	April 2024	3	96.4	243.0
NL utilities	January 2021	5	75.1	181.5
		Subtotal	**4,189.5**	**11,780.9**

Natural gas				TJ
Efficiency Manitoba*†~	April 2020	6	155.4	3,334.6
Enbridge	January 2023	3	525.5	11,823.0
Énergir	October 2023	3	180.4	6,226.0
FortisBC Energy	January 2024	4	626.7	3,897.0
NB Power‡	April 2024	3	139.6	1377.9
SaskEnergy	April 2025	1	9.8	102.5
		Subtotal	**1,637.4**	**26,761.0**
DSM plans total (electric and natural gas, savings in TJ)			**5,826.8**	**69,172.1**

* Includes extensions on earlier plans. Efficiency Manitoba's last three-year plan ran from 2020–2023 and has been extended through 2026/27. Efficiency Nova Scotia recently extended its 2023–2025 through 2026.
~ On October 10, 2025, Efficiency Manitoba was issued a directive to extend its DSM plan through 2026/27. Budget and energy savings targets for this time are not yet publicly available. As such, we have accounted for DSM planning up to 2025/26 in the table above.
† BC Hydro's and Efficiency Manitoba's savings targets include codes and standards.
‡ NB Power includes funding from provincial and federal sources in its DSM plan and attributes energy savings for both electricity and natural gas to the respective funding source. To improve comparability with other provinces, we divided the total three-year budget ($236 million) between electricity and natural gas based on the share of total savings from each energy source. NB Power's budget from utility funds was $137.9 million.
¶ Energy savings targets are at the generator level but have been adjusted here by reported line loss percentages.

Combined, these electric and natural gas plans comprise $5.8 billion of investment in energy efficiency and could deliver 69 petajoules of incremental energy savings over the years they are in place. Though we are unable to reliably report on the full cumulative energy savings or the aggregate net present value of these investments, we estimate that the total potential net present value for all DSM plans could exceed $16 billion.[6]

[6] Not all program administrators report cumulative savings or net present value. For those that do report net present value, the underlying cost-effectiveness screening tests and methodologies vary. We estimated the ratio of total investment to net present value at 2.7, based on the reported figures from the following utilities: FortisBC Energy (UCT), Efficiency Manitoba (UCT), Efficiency Nova Scotia (TRC), NB Power (UCT), efficiencyPEI (UCT), Hydro-Québec's 2026–2028 plan (TRC) and Year 1 of Enbridge's plan (TRC plus 15 per cent adder).

Table 2. Average annual budget across DSM plan period, per customer*

Utility	$
Énergir	277.2
FortisBC Energy	144.3
BC Hydro	121.6
IESO	110.0
FortisBC	109.6
Efficiency Nova Scotia	107.9
Efficiency Manitoba (natural gas)	87.0
efficiencyPEI	83.8
NB Power (electricity)~	83.7
Efficiency Manitoba (electricity)	79.2
Hydro-Québec	76.6
NL utilities	47.7
Enbridge	46.4
Average	**105.8**

* Customer data is from 2023
~ Estimated funding for electricity savings programs (i.e., 40 per cent of total portfolio budget) divided by total electric customers

Table 3. Average annual savings target across DSM plan period, per domestic end-use energy sales*

Utility	Percentage
Efficiency Manitoba (electricity)~	1.53
BC Hydro~	1.29
IESO	1.19
Efficiency Nova Scotia	1.17
Énergir	0.89
FortisBC	0.82
efficiencyPEI	0.74
Efficiency Manitoba (natural gas)	0.73
FortisBC Energy	0.64
NB Power (electricity)	0.60
Hydro-Québec	0.49
NL utilities	0.39
Enbridge	0.39
Average	**0.75**

* Domestic end-use energy sales data is from 2023
~ Both Efficiency Manitoba and BC Hydro include savings from codes and standards work in their targets. Excluding codes and standards, BC Hydro's average annual savings target is approximately 0.8 per cent. Efficiency Manitoba's electric savings target is approximately 0.68 per cent.

On an averaged and annualized basis, these plans equate to approximately $105 in spending per customer and a savings target of 0.85 per cent, measured against domestic end-use sales.

Recent developments

Over the past two years, Efficiency Canada has observed an upward trend in the scale of ambition in electricity system DSM plans. This trend has been driven primarily by the three largest electricity efficiency program administrators — BC Hydro, Hydro-Québec and the IESO — each of which has recently announced substantial increases in DSM budgets.

BC Hydro's previous DSM plan was approved for the period April 2022–March 2025 with a total budget of $295.7 million and targeted annual energy savings of 1,844 GWh.[7] In 2023, revised long-term load forecasting prompted the utility to revise its integrated resource plan and accelerate "near-term actions" on energy efficiency, demand response, and industrial load curtailment (among other areas). After underspending in Year 1 of this plan, BC Hydro increased budgets for Years 2 and 3, for a net increase of approximately 31 per cent over the original three-year budget. The latest application (March 2025) establishes budgets of $247 million and $293 million for April 2025–March 2026 and April 2026–March 2027, respectively, as BC Hydro continues to adjust its DSM activities to meet revised load expectations.[8] This is approximately three times the annual spending initially budgeted in the previous plan.

Developments in Ontario and Québec have similarly been driven by revised long-term electricity load forecasts (though their underlying motivations and assumptions differ). Ontario is now projecting a 75 per cent increase in electricity demand by 2050, and Hydro-Québec has stated it will need to double its current capacity to meet energy transition goals. In this context, both provinces announced large, long-term electricity DSM plans in early 2025 — the IESO's in January (12 years, $10.9 billion, 18 TWh), and Hydro-Québec's in April (10 years, $10 billion, 21 TWh). Combined, that averages nearly $2 billion a year in investment, which is roughly double the level of annual investment from all provinces we observed five years ago.

In July 2025, Hydro-Québec submitted a budget request for 2026 to 2028 for its energy efficiency and demand management portfolio. The total budget is $2.1 billion, targeting 4,652 GWh of electricity savings. Using the same 2023 figures for customers and

[7] BC Hydro, "BC Hydro F2023-2025 DSM Expenditure Schedule."

[8] BC Hydro, "BC Hydro Compliance Filing for Order G-108-25."

domestic sales, the average annual spend for this three-year period is $154 per customer, and the average annual savings rate is 0.87 per cent.

In October 2025, NB Power filed its 2026/27 to 2028/29 DSM plan, which has a budget totalling $447 million. The plan aims to achieve 312 GWh of incremental electricity savings and 1,269 TJ of incremental fossil fuel savings.[9] We expect new multi-year plans from efficiencyPEI and Newfoundland Power/Newfoundland and Labrador Hydro to be finalized in 2025 and 2026, respectively. Efficiency Manitoba's current plan (the fourth one-year extension of the original 2020–2023 plan) will end in March 2027. Efficiency Nova Scotia's current 2023–2025 plan was extended until December 2026 through legislative amendments prescribing the investment level. The utility expects to initiate proceedings around a new five-year plan in Q1 2026.

Enbridge has also requested an extension of the 2023–2025 plan to cover 2026, though it submitted an initial application for a new five-year plan to the regulator in November 2024. The cancellation of the federal carbon tax, announced in March 2025, led Enbridge to petition for the extension because there was insufficient time to deliberate and receive regulator approval on an updated multi-year plan to implement effective January 2027. The multi-year plan as filed had an approximate total budget of $1.67 billion and a savings target of over 32,000 TJ — roughly double the size of the previous plan, on an annualized basis. This will be superseded by an updated multi-year plan reflecting the removal of the federal carbon charge and other developments since the November filing. Enbridge filed the one-year extension request in June 2025, proposing a budget of $199.8 million for 2026.

Portfolio activities

DSM portfolios are typically organized — and budgets and savings targets summarized — by the type of activity and the market segment they serve. Classification and reporting on DSM activities in Canada is highly specific to each utility, however, which presents challenges for comparing and summarizing across DSM portfolios.

We consider two broad types of activities: programs and enabling activities. Programs deliver something to external parties (e.g., incentives), typically for the purposes of acquiring energy or capacity resources, and thus often have performance targets in the

[9] NB Power, "Appendix BI - 2026-27 to 2028-29 DSM Plan," 12.

form of energy or capacity savings.[10] Program market segments generally include some arrangement of residential and non-residential (commercial, industrial) sectors. Programs for lower-income households, or programs for Indigenous communities, are also often defined as separate market segments, which we refer to as equity-oriented programming. These sometimes combine residential and non-residential elements.

What one utility considers a program for administrative purposes, another might consider a bundle of other programs or discrete measures. Accordingly, programs as designed and reported on in DSM documentation may not align with customer-facing program names or incentives. Capacity-focused activities generally include demand response programs but may also include special rate schedules.

Most utilities include a dedicated budget line for enabling activities that support program delivery — like marketing, planning and studies, and evaluation — though the range of activities included varies. Some utilities also report portfolio and overhead spending separately, while others include it in program budgets. While enabling activities are generally included in portfolio cost-effectiveness testing, they typically do not have performance targets and generally are not specific to market segment. As such, we also include "enabling" activities that generally do not have energy or capacity savings targets but are not strictly enabling; for example, budgets for research and development (innovation) or market transformation.

We have classified all items with separate budget lines in the utility DSM plans reviewed as either residential or non-residential energy efficiency programming, equity-oriented energy efficiency programming, capacity-focused programming, or enabling/supporting. This classification is our best estimation and may not exactly reflect how the utilities consider these activities, given the qualifications noted in the preceding paragraphs.

[10] Capacity 'savings' is an inaccurate description of the actual resource acquired. Energy efficiency programs may result in permanent reductions in peak demand, measured in MW, while demand response programs may provide a dispatchable capacity resource (even if it is not actually drawn upon), also typically measured in MW. Utilities are inconsistent in how they report targets or performance from these different programs.

Based on this analysis, we find that energy efficiency programs account for roughly 81 per cent of the total budget. Residential programs accounted for 22 per cent ($1.4 billion), non-residential programs for 45 per cent ($2.6 billion), and equity-oriented programs for 12 per cent ($720 million). Demand response or capacity-focused initiatives account for 6 per cent ($346 million), and enabling activities for the remaining 13 per cent ($730 million).[11]

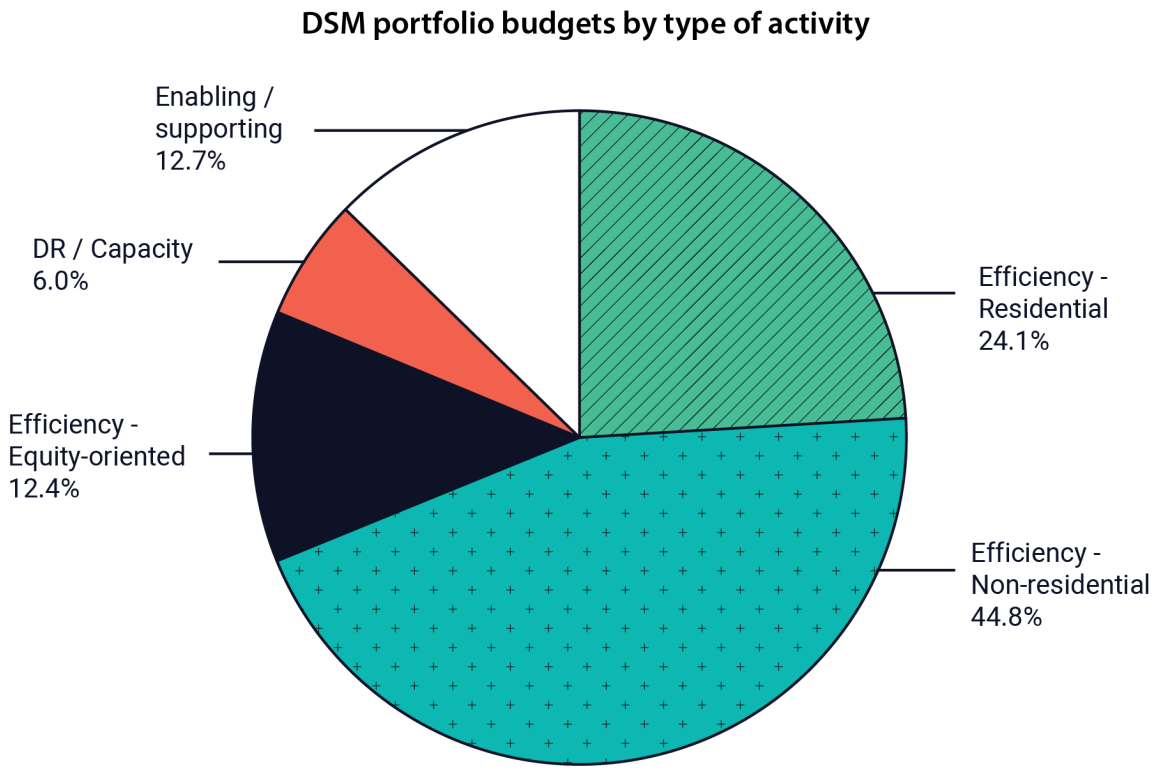

Figure 1. DSM portfolio budgets by type and activity

These values vary among utilities, reflecting customer bases and provincial policy. Though there is more investment in the non-residential sector overall, this is not true for some utilities — namely those in the Atlantic provinces (and Enbridge). On the other hand, having a relatively small residential customer base, Énergir allocates 93 per cent of its budget to commercial and industrial programs, which accounts for the utilities' high budget/customer value above. FortisBC's natural gas DSM plan allocates a relatively high share of investment toward enabling activities. This is due in part to policy changes that restricted the utility's ability to provide incentives for natural gas

[11] Totals may not add due to rounding.

heating equipment. Consequently, FortisBC Energy increased its “Innovative Technologies” budget to support research and development around natural gas heat pumps, hybrid systems and deep energy retrofits. The innovation budget alone accounts for approximately 14 per cent of the portfolio total.

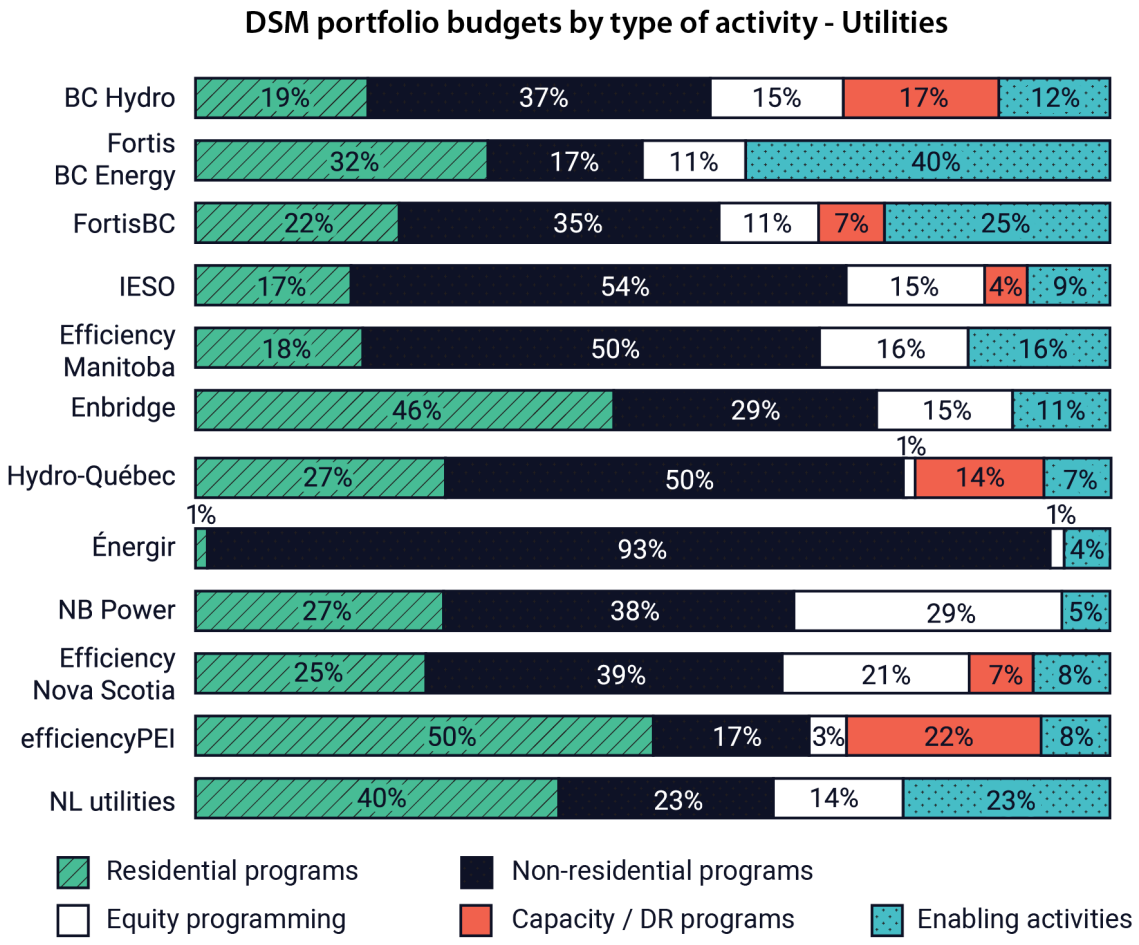

Figure 2. DSM portfolio budgets by type and activity by utility[12]

As noted, we’ve classified low-income programs (i.e., programs or measures for which there is typically an income eligibility threshold) and programs for Indigenous

[12] This figure shows results for utilities that have publicly released DSM plans (as captured in Table 1). Neither SaskPower nor SaskEnergy publicly release detailed budgets, which are needed to conduct this analysis.

communities as equity-oriented. These categorizations are approximations and require further clarification.

While most utilities clearly demarcate budgets and performance metrics for such programs, some include them in more general program bundles. For instance, both Efficiency Nova Scotia and efficiencyPEI have a mix of dedicated programming (available only to marginalized communities) and non-dedicated programming (general programming that also serves marginalized communities). Similarly, in some provinces, governments may administer equity-oriented programs directly (potentially alongside utility programs) or provide funding to the utility to administer such programs. In the former case, these programs may not appear in this analysis — for example, additional equity-oriented programs in Prince Edward Island, Newfoundland and Labrador, and Nova Scotia are not included in this analysis of DSM plans.

In the case of low-income programs, utilities may also offer programs for social or affordable housing building owners or managers that are not income-targeted. These are not always included in “low-income” program categorizations. Similarly, programs for Indigenous communities are sometimes included within program budgets for non-integrated (i.e., off-grid) systems.

In the table below, we have summarized budgets for low-income programs and programs for Indigenous communities following how utilities themselves categorize these programs.

Table 4. DSM portfolio budgets over plan period, by activity type — Equity-oriented programs

Administrator	Plan period (years)	Low income ($M)	Northern, remote, Indigenous ($M)	Total ($M)	% of portfolio
BC Hydro†	2	54.0	24.7	78.7	14.6
FortisBC Energy	4	44.6	18.9	63.5	11.3
FortisBC	5	9.0	-	9.0	10.9
IESO~	3	251.0	27.0	278.0	15.4
Efficiency Manitoba‡	6	56.2	17.3	73.5	16.3
Enbridge	3	77.9	-	77.9	14.8
Hydro-Québec†	3	3.0	7.5	10.5	1.0
Énergir	3	2.7	-	2.7	1.5
NB Power	3	69.1	-	69.1	29.3
Efficiency Nova Scotia*	4	43.8	4.8	48.6	20.5
efficiencyPEI	3	0.8	-	0.8	3.1
NL utilities†	5	2.2	5.4	7.5	14.2
SaskEnergy	1	0.4	0.1	0.5	5.0
Total		**614.7**	**105.7**	**720.3**	**12.5**

Note: See Table 1 for plan period dates.

* Estimate using the Mi'kmaw Home Energy Efficiency Project spending for Indigenous.

~ Does not include LI beneficial electrification.

† Includes entire non-integrated systems budget.

The data shows a total combined budget for equity-oriented programs of $720.3 million, which is approximately 12.5 per cent of total DSM portfolio budgets for the plans reviewed here.

2024 DSM performance benchmarking

DSM program spending and energy savings data benchmarked below are from the most recent year (12 months) for which complete data is available. For this 2025 Programs Report, this period occurs within the 15-month window between January 2024 and March 2025 (with the exception of Énergir, which has a fiscal year that ran from October 1, 2023, to September 31, 2024). This window is longer than one year to accommodate program administrators on fiscal year reporting periods (typically ending March 31). Portfolio spending is benchmarked against domestic, end-use customers

(forecasted if 2024 data was unavailable). Portfolio energy savings are benchmarked against domestic, end-use sales (again, forecasted if 2024 data was unavailable).

Table 5. DSM portfolio spending (2024)

Utility	Budget, from plan ($M)	Actual spending ($M)	Spending / customer ($)
Énergir	54.5	51.6	242.7
FortisBC Energy	166.9	158.9	144.8
Efficiency Nova Scotia	57.5	65.7	118.0
Hydro-Québec	351.3	498.7	108.4
FortisBC	15.4	14.7	95.3
Efficiency Manitoba (natural gas)‡	32.3	26.40	87.70
IESO	476.3	482.1	87.5
efficiencyPEI~	7.3	8.5	85.4
Enbridge	183.1	302.1	76.7
Efficiency Manitoba (electric)‡	44.6	47.40	75.0
BC Hydro	198.1	158.3	70.1
NL utilities*	9.6	8.9	28.2
SaskEnergy	-	9.0	21.8
SaskPower	-	10.5	18.7
NB Power†	88.9	173.9	-
Total	**1,685.8**	**2,016.7**	**95.7**

* The budget for NL Power and NL Hydro excludes budgets for electrification, which were included in the original plan. The annual budget, including electrification, was $15 million.
~ PEI customer count is derived from Maritime Electric's latest Sustainability Report (2024), which reported on the number of 2023 electricity customers. Maritime Electric serves roughly 90 per cent of the province.
† We are not able to calculate NB Power's spending per customer. It administers both natural gas and electricity, but we only have total spending data for 2024 — not spending per energy source.
‡ Efficiency Manitoba serves both electric and natural gas customers. Spending per customer has been reported by energy type and the number of customers served by each energy type.

Table 6. DSM portfolio net annual incremental energy savings (2024)

Utility	Target, from plan	Actual	Savings / sales
Electricity	GWh	GWh	%
BC Hydro*	648.0	603.3	1.06
FortisBC	27.3	34.2	0.97
SaskPower	-	8.4	0.04
Efficiency Manitoba	338.2	256.4	1.13
IESO	1,575.0	2010.6	1.53
Hydro-Québec	864.2	1,107.0	0.62
NB Power	73.7	76.9	0.57
Efficiency Nova Scotia	131.8	156.4	1.48
efficiencyPEI~	10.8	8.2	0.53
NL utilities	34.2	27.5	0.29
Subtotal	**3,703.2**	**4,288.9**	**0.96**
Natural gas, NRFs	TJ	TJ	%
FortisBC Energy	860.1	1,604.8	0.73
SaskEnergy	-	68.37	0.03
Efficiency Manitoba	657.2	440.1	0.56
Enbridge	5,792.7	6,016.5	0.58
Énergir	2,032.9	1,879.9	0.81
NB Power	405.1	438.3	1.59
Subtotal	**9,748.0**	**10,448.0**	**0.56**
Electricity, natural gas, NRFs	TJ	TJ	%
Total	**23,079.5**	**25,888.0**	**0.74**

* BC Hydro's savings target is from its original 2022–2024 plan, before the budget was increased.

~ PE sales are an estimate based on previously recorded Maritime Electric sales as 90 per cent of provincial total. We assumed a load growth rate of 2 per cent in 2024.

Our tracking indicates that utilities overall exceeded both budgets and savings targets for 2024, reaching nearly $2 billion in annual spending and over 25 petajoules in net annual energy savings. This selection of utilities, therefore, exceeded the total national net annual energy savings we tracked for 2023 in our larger Scorecard report.

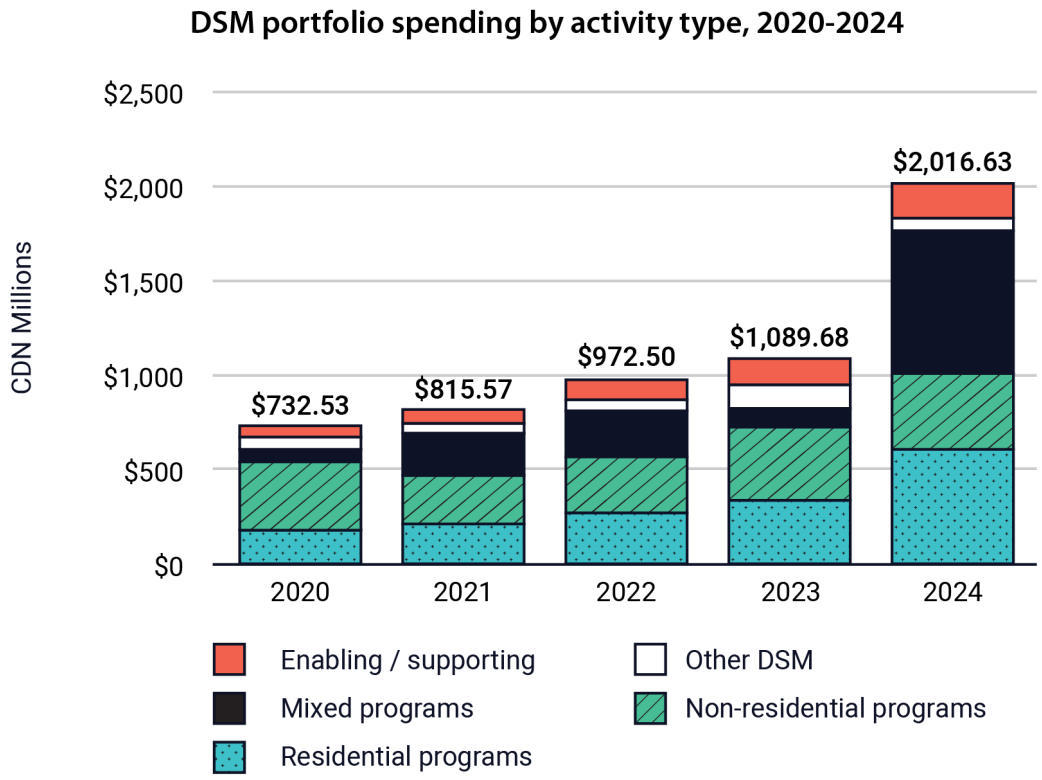

Figure 3. DSM portfolio spending by activity type (2020–2024) [13]

Trends over the past five years show a steady increase in spending, with a particularly large increase in 2024. The biggest increases in spending were the IESO and Hydro-Québec, which both increased spending by 153 per cent, followed by NB Power (117 per cent increase) and Enbridge (109 per cent increase). These four utilities accounted for roughly $840 million of the $927 million in additional spending in 2024 over 2023.

The success of programs providing incentives for electric heat pumps appears to be a major driver of overall spending increases. For example, a large proportion of the increase in spending for Hydro-Québec was in its LogisVert program, which provides incentives for several major appliances, including heat pumps. Spending on that program increased from $4 million in 2023 to $250 million in 2024. Similarly, most of Enbridge's increase in spending was associated with its residential whole home program. This included incentives offered for electric heat pumps — initially as part of

[13] "Other DSM" includes activities that may achieve energy savings including rates; demand response; and distributed generation.

the federal Greener Homes co-funding arrangement, and later (after the Greener Homes' closure) as a stand-alone utility program. Spending on this program increased from $55 million in 2023 to $197 million in 2024.

Unfortunately, we are not able to provide as much insight into spending increases from the IESO or NB Power, as we have only portfolio-level results attained through an information request at the time of writing (not an official annual performance report). Most of NB Power's increase in spending appears to be associated with equity-oriented programs like the Enhanced Energy Savings Program, which is funded by provincial and federal sources.

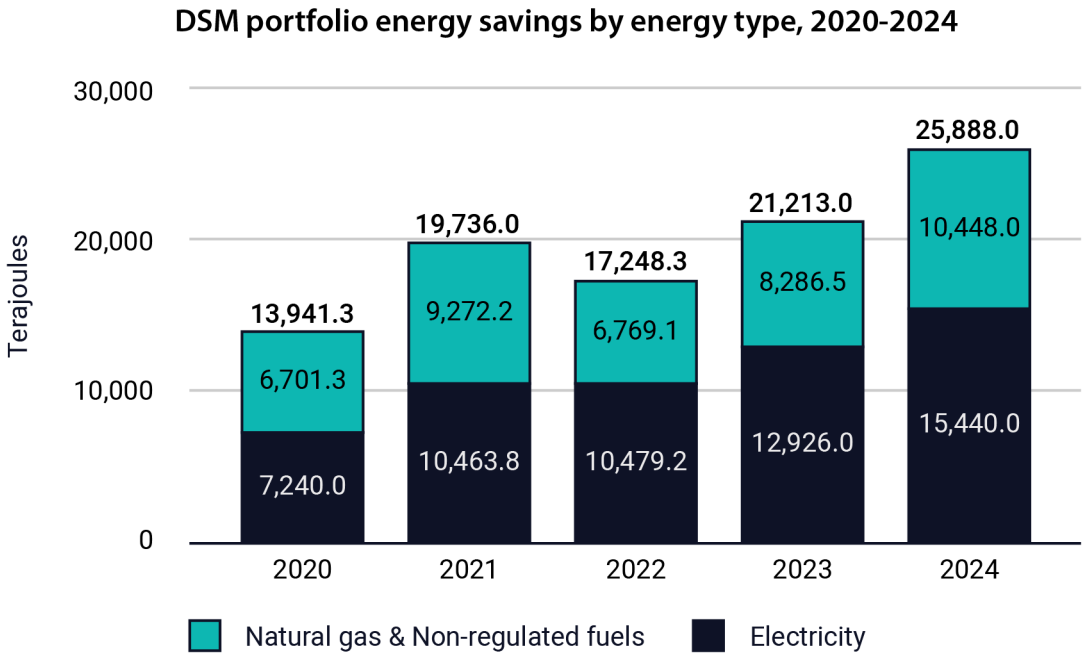

Figure 4. DSM portfolio energy savings by energy type (2020–2024)

Net annual energy savings have also steadily grown over the long term, though with some fluctuations year-over-year and without the large jump between 2023 and 2024. While we expect this trend to continue, we do not expect increases in spending to lead to commensurate increases in energy savings. Several factors contribute to this, including inflation, an increased focus on equity and distributional considerations in DSM, more spending on capacity-focused DSM, and increased spending for market transformation and capacity-building initiatives, which may not produce energy savings directly.

Demand flexibility

Electrification is essential in Canada's net-zero transition, and demand flexibility is essential to cost-effective, reliable electrification. As defined by the American Council for an Energy-Efficient Economy (ACEEE), "demand flexibility is the capacity of energy consumers to change their energy consumption at various timescales."[14] The International Energy Agency has called for substantial increases in initiatives to support demand flexibility — such as demand response programs, increased investment in batteries and further development of digital electricity networks capable of using smart equipment and controls to deliver reliable and flexible energy services.[15]

Energy consumers flex their demand in response to grid conditions and price signals using distributed energy resources (DERs). Demand-side DERs used for providing flexibility include (but may not be limited to) demand response programs, energy storage systems (e.g., batteries), smart appliances and controls, and electric vehicles (EVs). These technologies allow for consumers and/or grid operators to increase demand when supply is abundant and decrease demand when the grid is constrained at either the bulk system/transmission level or local/distribution grids. Demand flexibility can thus serve as a "non-wires alternative," deferring or avoiding costly infrastructure upgrades.[16]

This section presents results from a comprehensive jurisdictional scan of provincial/territorial demand flexibility initiatives conducted via desk research and interviews with program administrators between April and September 2025. We also report on peak demand reductions from energy efficiency programs and available capacity from demand flexibility initiatives achieved in 2024.

We have organized our scan into two broad categories of demand flexibility initiatives: programs and rates (further details on the definitions of these initiatives are provided in relevant sections below). This methodology follows that used in a 2024 Berkeley Lab

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[14] Johnson et al., *Enabling Industrial Demand Flexibility: Aligning Industrial Consumer and Grid Benefits*, 1.

[15] International Energy Agency, *Net Zero by 2050: A Roadmap for the Global Energy Sector*, 23.

[16] Murphy et al., *The State of Demand Flexibility Programs and Rates*, 1.

report,[17] which assesses programs and rates promoting demand flexibility in residential and commercial buildings in the United States. Both programs and rates are generally administered and delivered by energy utilities and/or a dedicated energy efficiency administrator, though not always included within a regulated demand-side management (DSM) plan. As our 2024 performance benchmarking includes only activities included within a DSM plan identified in the first section of this report, we also distinguish between demand flexibility initiatives in this scan that exist within or "outside" our DSM benchmarking.

Programs

The focus of our jurisdictional scan was initiatives that deliver, or enable the delivery of, flexibility to grids. Programs do so by engaging with customers (or devices) via channels that are generally more direct than "passive" pricing signals provided through rates. Customers must often enroll or opt-in to programs (which may not be true of rates), and programs often involve contracts and provide incentives and/or equipment. Program administrators thus often retain more control over the resource than via rates.

Common examples of programs include behavioural demand response (BDR) initiatives, which ask participants to manually reduce energy use during periods of high demand, and direct load control (DLC) initiatives, which allow a utility to remotely adjust a customer's demand. In the latter case, a distributed energy resource management (DERM) system may be used to automatically change settings of connected equipment, like a smart thermostat, for a short period. DLC is a form of automated demand response (ADR) program, which may also include programs where signals trigger automatic responses in certain technologies, but without direct control over the load by the utility. "Managed solutions" are yet another class of program activity that aims to continuously automate and optimize the behaviour of a range of DERs — for example, an EV charging program managed by the utility to continuously respond to grid conditions.

There are yet other ways utilities and customers can provide flexibility to grids through demand-side-focused initiatives. We have included two in our program scan: competitive market mechanisms that procure capacity (e.g., IESO's capacity auction

[17] Murphy et al., The State of Demand Flexibility Programs and Rates.

and AESO's Operating Reserve) and programs that enable demand flexibility but do not directly provide it (e.g., a rebate program for smart thermostats). Inclusion in the latter category typically depended on a clear strategy to use the incentive program to point customers toward a companion demand response program.

The coordination and/or aggregation of multiple types of demand flexibility resources and programs into a singular dispatchable resource is known as a "virtual power plant" (VPP). The distinction between a VPP and a managed solution can be difficult to make, and some program administrators refer to their programs as VPPs. We consider a VPP to be less a *program* per se, and more a particular manifestation of resource coordination with certain characteristics (e.g., acting as one entity at the bulk system level). We did not identify any such resources or initiatives.

We captured 30 programs active in 2025 in our jurisdictional scan. These include:

- Nineteen demand response programs — six of which were pilots and four of which were administered by local/regional utilities not captured in our DSM plan analysis.
- Two market systems to procure capacity.
- Nine enabling programs, one of which was a pilot, providing rebates for demand flexibility-related equipment.

Of the 19 demand response programs, we classified:

- Nine as including BDR components
- Seven as including ADR components
- Six as 'managed solutions'

Several programs have both BDR and ADR components. Some were challenging to categorize. For instance, we included the Bi-energie program in Québec, where Hydro-Québec and Énergir collaborate on a hybrid heating program. As the program is designed to shift customers automatically from electric to natural gas heating under certain conditions, in order to preserve electricity system capacity, we consider it a demand flexibility program with ADR characteristics. The managed solutions programs were often also bring-your-own-device (BYOD) programs, allowing customers to enroll several technologies (generally smart thermostats and/or EV chargers) in an initiative managed by the utility.

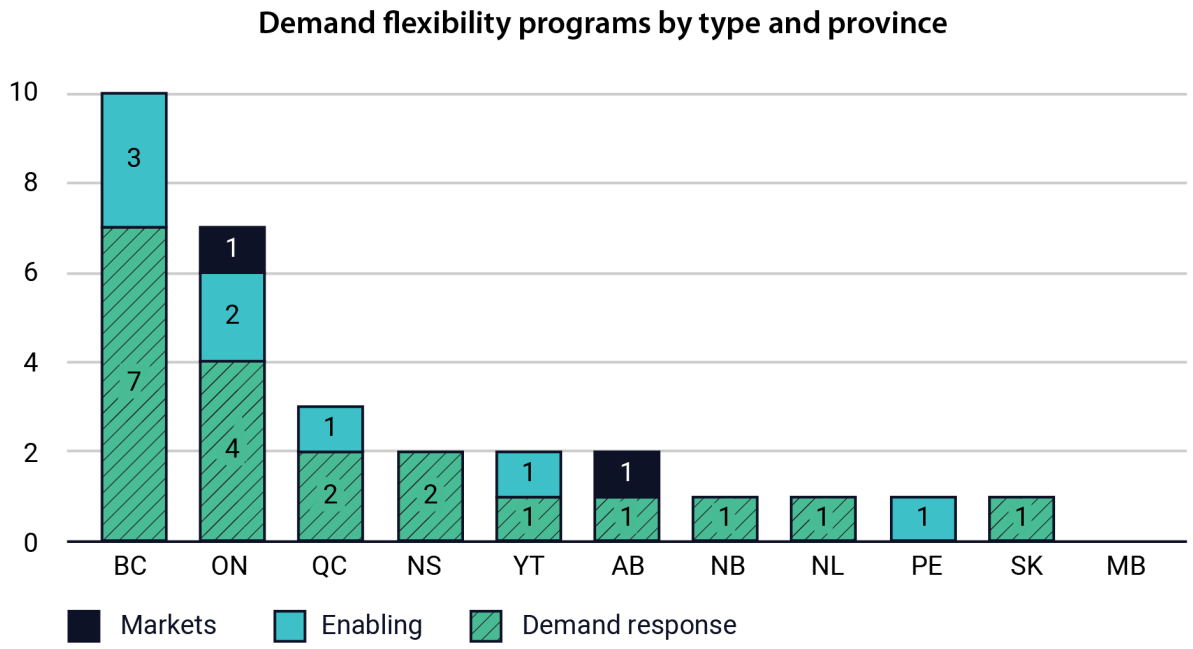

Figure 5. Demand flexibility programs by type and province (2025)

British Columbia, Ontario and Québec account for more than half of the programs identified. Three of the six pilot programs captured in our scan are found in British Columbia. These include a commercial and industrial ADR program offered by FortisBC and BC Hydro's Residential Battery Direct Install Pilot, which offers a free battery energy storage system to select customers, who must then enroll in the utility's Peak Saver program.

IESO launched its residential smart thermostat demand response program, Peak Perks, in June 2023, with 100,000 participants enrolling in the first six months.[18] While Peak Perks is part of the IESO's 12-year eDSM framework, commercial and industrial demand flexibility initiatives in Ontario are, for the time being, outside this framework. These include IESO's Industrial Conservation Initiative and Capacity Auction, which secures capacity resources through an annual competitive process. In January 2025, the IESO expanded the Peak Perks program to small business customers (under 50 employees), and in 2026, it will launch a separate commercial HVAC demand response program. Hydro-Québec has fully integrated former subsidiary Hilo into its DSM portfolio as of

[18] IESO, "Save on Energy's Peak Perks Program Reaches Milestone Enrollment."

2023, offering utility-controlled space heating, EV charging, and connectivity to smart plugs and lighting at participants' control.

We did not identify any active programs in Manitoba in 2025. However, Efficiency Manitoba and Manitoba Hydro are preparing to jointly deliver on a recently released multi-year demand response strategy.[19] The strategy identifies peak savings potential of up to 324 MW by 2037 from demand response initiatives. The first phase, for pilots and program design, will take place between 2025 and 2027, followed by program ramp-up between 2028 and 2030 and further portfolio expansion thereafter.

Prince Edward Island's program is a regional electric thermal storage offering from the City of Summerside's electric utility, which seeks to take advantage of an abundance of wind energy. It provides a rebate for customers to install this technology and gives participants a specialty electricity rate, but it does not enroll them in any demand response initiative. EfficiencyPEI is expected to begin offering demand flexibility pilots shortly in accordance with its most recent Electricity Efficiency and Conservation Plan.[20]

Technologies

Table 7. Demand response programs by technology (2025)

Technology	Residential	Commercial / industrial
Thermostats	7	-
Battery storage	3	2
Electric vehicles	6	-
Water heating	3	-
Other	1	1
Tech-agnostic	-	7

It is difficult to classify programs by market segment and technologies involved, since several programs target multiple sectors or involve multiple technologies. Broadly, we

[19] Manitoba Hydro and Efficiency Manitoba, "Manitoba Demand Response Strategy."

[20] efficiencyPEI, *Electricity Efficiency and Conservation Plan 2022/2023 – 2024/2025: Energy Efficiency and Demand Response Initiatives*.

found equivalent program counts for residential (10) and commercial/industrial sectors (10).

Residential programs were far more likely to be technology-specific, and thermostats were the primary technology included. Seven out of nine programs offered enrollment for smart thermostats, six for EVs and/or EV chargers, three for water heater load controllers, and one for electric thermal storage systems. Only two programs include home battery storage as an eligible technology (BC Hydro's Peak Saver program and Efficiency Nova Scotia's Eco Shift program). Most programs allow enrollment of multiple technologies, though IESO's Peak Perks program only allows thermostats.

Commercial/industrial demand response programs are generally technology-agnostic, behaviour-focused programs. Exceptions include FortisBC's Horticultural Load Shifting pilot, which offered incentives for shifting large lighting loads to off-peak hours, BC Hydro's "Energy storage incentives for business program," and Hydro One's "Demand Flexibility" managed solution program, which invites many different kinds of DERs to participate.

All of the identified enabling programs provided incentives to residential customers; only BC Hydro's "Solar PV and battery storage rebates" program also served commercial customers and multi-unit residential buildings. Three programs offered rebates for smart thermostats, two for electric thermal storage equipment, one for EV/EV chargers, and one for water heater load controllers.

Incentives

Demand flexibility programs offer upfront (e.g. rebates, enrollment bonus), retention (i.e. remaining enrolled through the completion of a program season), and/or performance (i.e. dollar per MW demand reduced) incentives. A program may offer one type of incentive or a combination. The table below indicates the frequency of incentives by customer segment. We have excluded programs categorized as enabling, which are exclusively upfront incentives by nature. We also excluded initiatives categorized as markets because their operation and incentive structures differ from traditional demand response programs.

Our jurisdictional scan captured incentive types for 18 of a possible 19 programs (eight residential, eight commercial and industrial, and two mixed). We were unable to

determine the incentive type for Hydro One's Flexibility Initiative as it is in the early stages of development.

Table 8. Incentive types offered by program count and customer segment (2025)

Incentive type	Residential programs	Commercial / industrial programs	Mixed programs
Upfront	-	1	1
Retention	1	-	-
Performance	1	7	-
Mixed incentives			
Upfront, retention	1	-	1
Upfront, performance	2	-	-
Retention, performance	1	-	-
Upfront, Retention, performance	2	-	-

Forty-four per cent of all programs offered an upfront incentive (whether as a single offer or as part of a mixed incentive offer). Thirty-three per cent offered retention incentives, and 72 per cent offered performance incentives. Thirty-eight per cent of programs (86 per cent of which are for residential customer programs) offered more than one incentive type. For example, FortisBC's residential Power Hours Rewards Program offers participants who participate in the smart thermostat stream of the program a $25 upfront incentive for enrolling their device and $25 for each completed program season. Meanwhile, those participating in the EV stream are offered an upfront incentive of $25 for enrolling and a performance incentive of $0.50 per event participated in. In November 2025, FortisBC launched Power Hours Rewards Program for Business, a commercial and industrial program that offers both a demand response

and load-shifting stream after its successful piloting of respective commercial and industrial automated demand response and a horticultural load-shifting pilots.[21]

Of the eight residential programs captured, all but two offered mixed incentives. Six of eight (75 per cent) offered performance incentives, and five (63 per cent) offered upfront incentives. This is also the case for retention incentives.

Of the eight commercial and industrial programs captured, all offered a single incentive type, seven (88 per cent) of which were performance incentives. For example, participants in Efficiency Nova Scotia's Smart Synergy program earn $100 per average kW reduced during peak demand events over the course of a program season. The program, implemented by EfficiencyOne, is supported by Nova Scotia Power and assisted by a third-party aggregator.

Of the two programs with mixed residential and commercial and industrial customer segments, one offered an upfront incentive, while the other offered mixed upfront and retention incentives.

Program operation

A peak event window is the designated time during which participants may be called upon to reduce load (automatically or manually) for a short period to address stress on the grid. Programs often outline the window of months, days, and hours during which an event can be called. As indicated in Figures 7 and 8, these windows often change based on the program season.

[21] As FortisBC launched the Power Hours Rewards Program for Business after the time of our data analysis, program details are not included throughout this section. Rather, we captured available details of the two pilot programs. The Power Hours Rewards Program for Business has a demand response stream with a winter (October 1–April 30) and summer (May 1–September 30) season, during which a maximum of 20 events may be called per season between 4 p.m. and 9 p.m. Participants earn a performance incentive of $50 per kW reduced (average per event over a season). In the load-shifting stream, participants shift energy use daily to off-peak hours, earning $40 per kW reduced (daily average over the quarter).

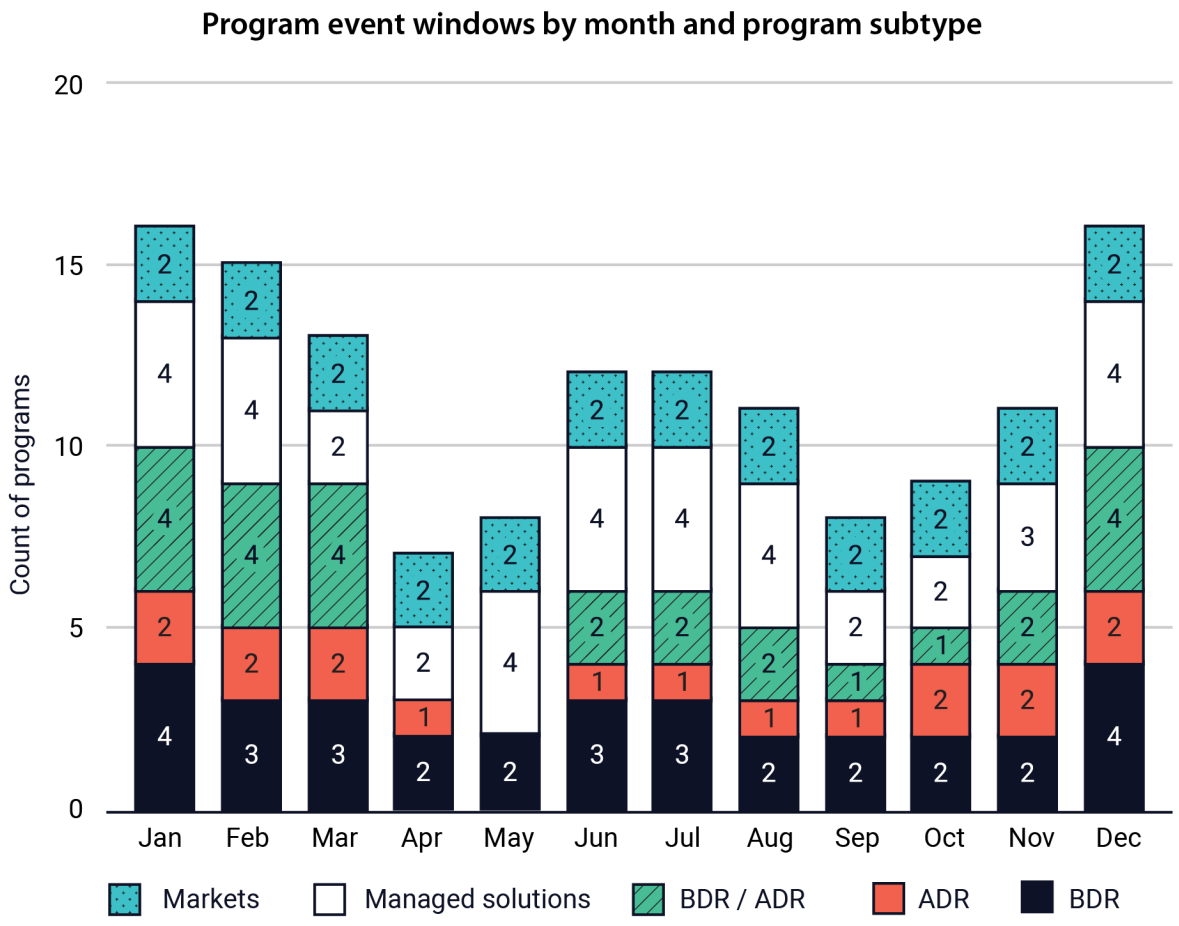

Figure 6. Peak demand event window by program count by month and program subtype (2025)

December, January, February and March have the most programs that may call events, followed by the summer months from June to August. This would be expected since more utilities in Canada are currently winter peaking, requiring a greater capacity to flex demand.

Figures 7 and 8 indicate the hours during which events may be called, by technology type, during the summer and winter seasons, respectively. The summer season indicates that there is increased activity in the evening, while heightened activity in the mornings and evenings is possible during the winter months.

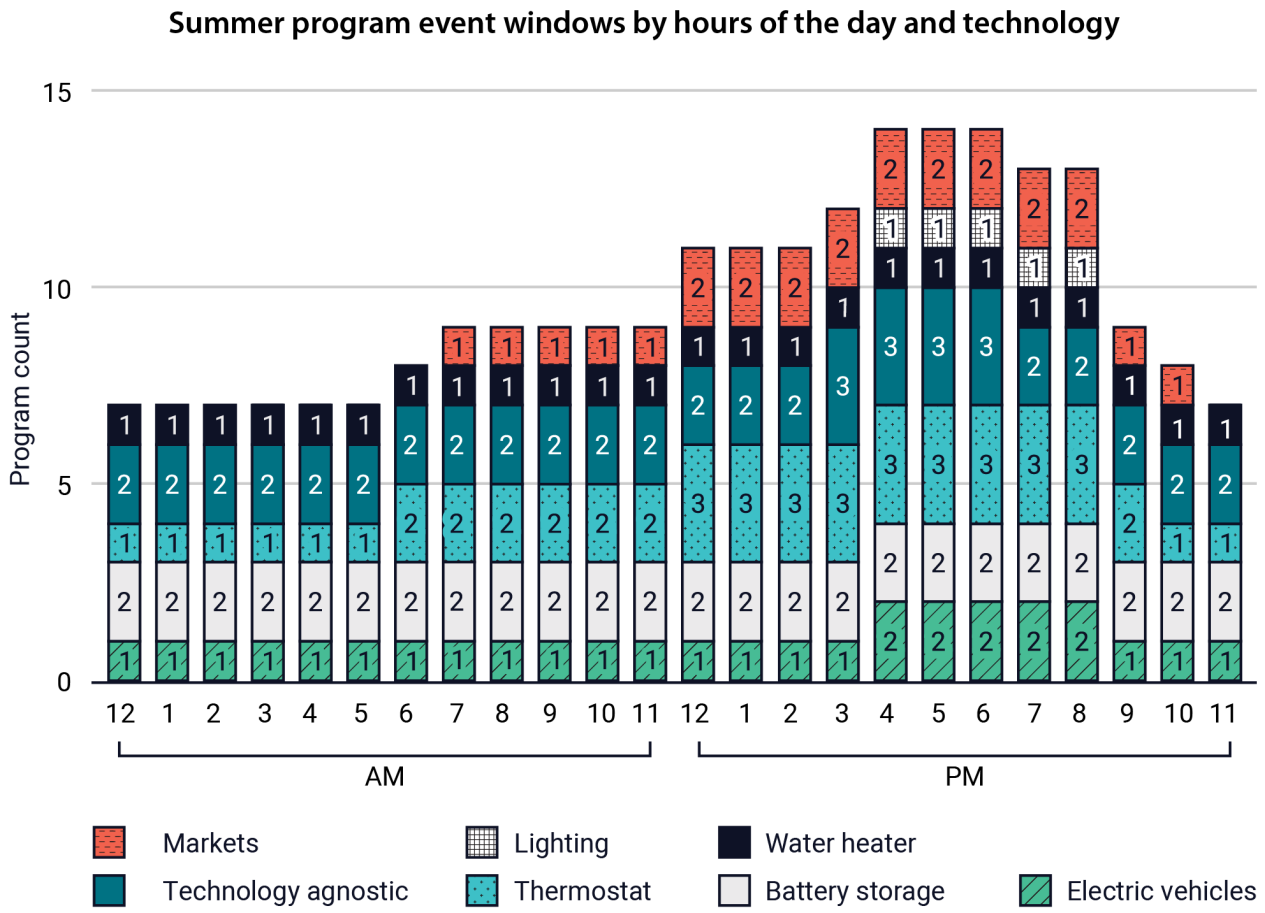

Figure 7. Summer peak demand event window by program count and hour (2025)

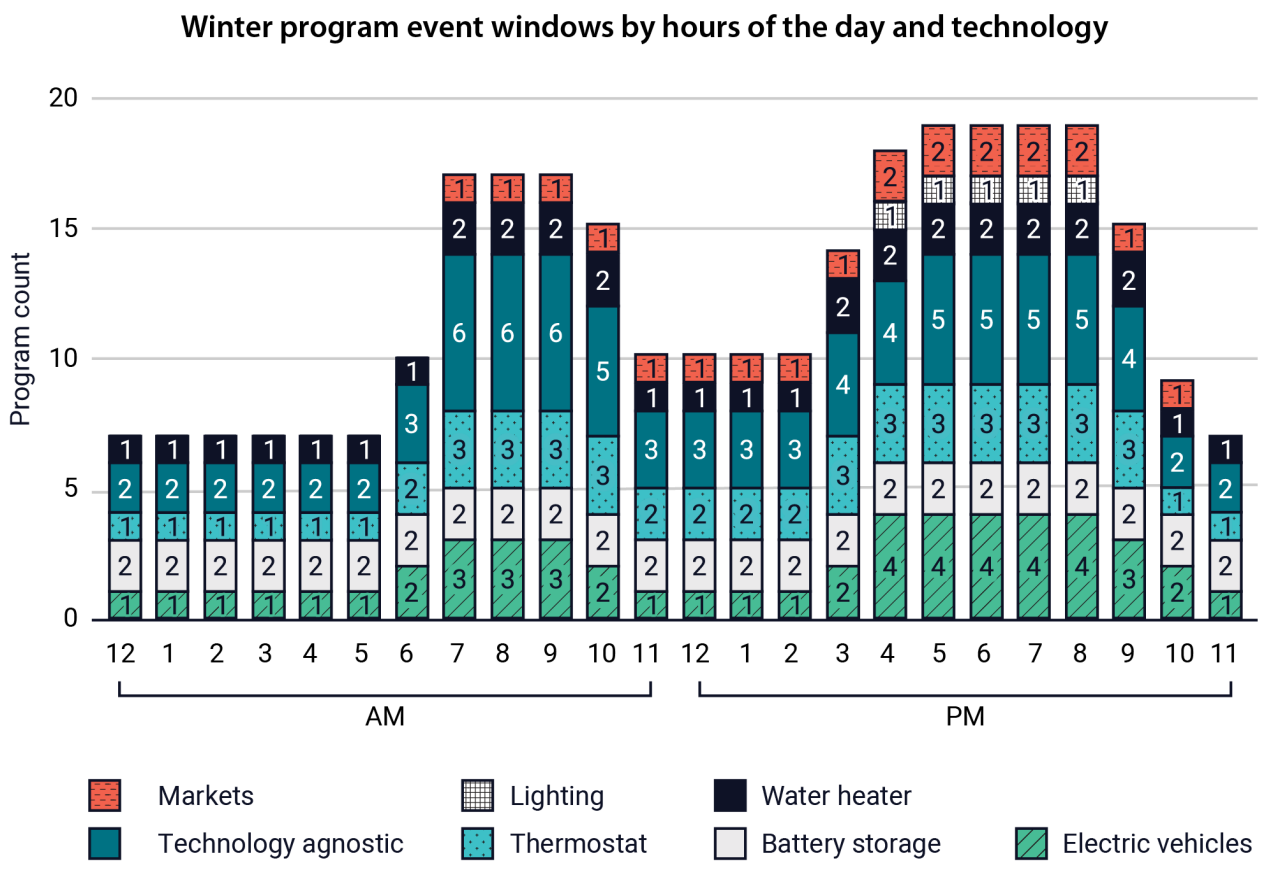

Figure 8. Winter peak demand event window by program count and hour (2025)

Events in both residential and commercial and industrial programs generally last a maximum of four hours. Program administrators may also set a limit on the number of events that can be called per day, month or season. There is significant variation in this number.

Programs most commonly notify participants of an upcoming event 12–24 hours in advance. However, some commercial and industrial programs, like IESO's capacity auction or AESO's Operating Reserves, notify participants minutes to a couple of hours prior.

Rates

Utilities can also use rates to manage load patterns. Roughly speaking, they can do so in two ways: through predefined, fixed-rate packages that encourage consumers to shift consumption when it is valuable to the grid; or through dynamic pricing arrangements

that adjust to reflect grid conditions (e.g., critical peak pricing). Similar to programs, either class of rates may specify certain demand flexibility technologies as an eligibility condition, or they may be technology-agnostic. Rates may be standalone initiatives, or they may be structurally connected to a demand flexibility program.

Quantifying and categorizing rates that support demand flexibility presents a particular challenge, however. Rates may be defined via a rate schedule, an option within or between schedules, or through supplemental mechanisms ("riders") within or across schedules that add or modify charges. Any one of these may be specific to a customer segment or applicable to multiple segments. Thus, while one utility might implement a time-of-use (TOU) rate through a single schedule applicable to multiple classes, another might create multiple schedules or options for separate segments. For example, multiple customer types are eligible under Hydro-Québec's singular Demand Response rate option, while the utility's "Flex Rates" are defined individually by customer type (i.e. Flex Rate G; D; M; G9).

Accordingly, we depart from the methodology used in the aforementioned Berkeley Lab report for this section of our jurisdictional scan and have not attempted to "count" the number of discrete rates. Instead, we distinguish between three broad classes of rates that are relevant to the broader issue of demand flexibility:[22]

- **TOU rates**, which have predetermined or 'fixed' prices for on and off-peak times.
- **Dynamic pricing rates**, including critical peak pricing, critical peak rebates, variable peak pricing, and real-time pricing rates.
- **Interruptible/curtailable rates**, where larger customers' demand is reduced during peak events via predefined, contractual benefits.

In the subsections below, we describe our findings on the use, scope and operational details of these three categories of rates by province. The following table provides a high-level summary of demand flexibility rates by province.

[22] BC Hydro, "Engagement on BC Hydro Optional Transmission Service Rates: Workshop #1," 18.

Table 9. Category of rates offered by province (2025)

Jurisdiction	Time-of-use	Dynamic pricing	Interruptible / curtailable
AB*	●		
BC	●		●
MB			●
NB			●
NL			●
NS	●	●	●
ON	●		●
PE			●
QC		●	●
SK			●

* ATCO Alberta offers a TOU rate in a limited capacity to some customers as part of an ongoing study.

Time-of-use

We identified active TOU rates, including one pilot and one study, in four provinces: British Columbia, Nova Scotia, Ontario and Alberta.

Both BC Hydro and FortisBC offer TOU rates. BC Hydro's opt-in TOU pricing is open to any residential customer with a smart meter and was launched in June 2024. It has only one peak period (4–9 p.m.) for the entire year and discounts the standard rate by 5 cents per kWh for overnight use. BC Hydro has also offered a special overnight rate for commercial customers with electric vehicles since 2021. FortisBC's is available for several commercial customer types, wholesale service, and irrigation and drainage customers, and it has different on- and off-peak times in the winter and summer.

Ontario has had opt-out TOU rates for residential and small commercial customers since 2006 and recently introduced an ultra-low overnight variant for the same customer groups to support EV charging. Ontario's overnight rate does not require customers to have an EV to opt in. The standard TOU rates have different on-, mid- and off-peak periods in the winter versus the summer.

In Alberta, ATCO has been conducting a study to determine the effects of a TOU rate for residential customers since 2023. Nova Scotia Power is also conducting a TOU rate pilot for residential customers, and it launched a separate rate class for customers with electric space heating that has storage capacity (e.g., electric thermal storage, in-floor heating) in 2024. The pilot TOU rate has on/off peak periods in the winter, and a flat rate during the summer.

Dynamic pricing

The Berkeley Lab study surveyed 100 U.S. utilities with a specific focus on identifying dynamic pricing rates or rate riders. It identified 69 dynamic rates: 38 critical peak pricing, four critical peak rebates, six variable peak prices and 21 real-time pricing. Comparatively, we found dynamic pricing available in only two provinces: Nova Scotia and Québec. BC Hydro is currently carrying out consultations on introducing some form of critical peak pricing.

Nova Scotia Power launched a critical peak pricing pilot program for residential and commercial customers in November 2024.[23] Participants are notified of events by email and/or text by 4 p.m. the day before, and then again at the beginning of the event. For both customer segments, events occur only in the winter (between November 1 and March 31), with a maximum of 18 events in total, three events per week. Events can last for four hours between 6 a.m. and 11 p.m. The pilot rate was in effect until October 31, 2025.

We identified two critical peak pricing rates from Hydro-Québec: “Flex Rate” and the Dual-energy system rates.

The Flex Rate option, available to multiple commercial and residential customer segments, incentivizes participants to reduce consumption during peak events via higher peak pricing. Participants thus assume some risk that their bills would increase if they are unable to shift enough of their consumption, but with the potential to realize greater savings than under the peak rebate options (because the non-peak price during winter is lower than the base rate). The Flex Rate options allow for up to 30 events or a

[23] Nova Scotia Power, “Time-Varying Pricing Rate Pilot Program.”

maximum of 100 or 120 hours (depending on the customer segment) between December 1 and March 31.

Finally, Hydro-Québec also offers a “dual-energy” rate option for commercial and residential customers. These rates require a special, dual-energy meter to record electricity consumption at different prices for space heating versus all other uses, but it is not structurally hard-linked to the “Bi-energie” program jointly delivered by Hydro-Québec and Énergir (program participants are not required to choose this rate option, and customers do not need to be program participants to choose it). The rate option works by automatically switching the dual-energy system from electric to natural gas heating when temperatures fall below -12 or -15 C (depending on region). This automatic switch is prompted by a temperature gauge at the site of the equipment (customers may also choose to manually switch from one energy source to another). During such an event, the electricity price for space heating increases considerably. Between May 1 and September 30, customers on this rate class revert to the common base rates.

Interruptible/curtailable

A final class of rates that can contribute to demand flexibility are interruptible or curtailable rates. Generally, these are available only to large commercial and industrial customers. Often, these are contractual — an eligible customer that opts in to one of these rates makes an agreement with the utility that their demand can be reduced by a certain level during peak periods. Curtailable rates offer advance notice to participants and leave it up to them to curtail use, while interruptible rates may provide no notice and leave load control to the utility itself. A third variant of such rates, not distinguished here, is sometimes referred to as a “supplemental non-firm” arrangement, where the utility and the customer agree that some portion of supply above a contracted firm amount is supplied at a premium but can be interrupted at any time.

Many electric utilities in Canada offer some form of interruptible or curtailable rate option to large customers, and in some cases, these are part of the aforementioned demand response programs (e.g., the Industrial Conservation Initiative in Ontario, SaskPower’s Demand Response program). The table below summarizes some of their basic features:

Table 10. Interruptible/curtailable rates by utility (2025)

Utility	Interruptible	Curtailable	Minimum eligibility	Notice period	Period
FortisBC	•		500 kVa (com); 5000 kVa (Ind)	Not guaranteed	Unknown
Hydro-Québec		•	Curtailable load >= 10 kW	4–15 hrs	4 hrs–30 days
IESO		•	Monthly demand >= 500 kW	n/a	n/a
Manitoba Hydro		•	Curtailable load >= 5 MW	5 mins–48 hrs	4h15m–10 days
NB Power	•	•		10 mins	
Newfoundland Power		•	Curtailable load 0.3 - 5 MW	1 hr	6 hrs
Nova Scotia Power	•	•	2000 kVa	10 mins	Unknown
SaskPower		•	Curtailable load >= 5 MW	12 mins–2 hrs	4 hrs

2024 DSM performance benchmarking

As noted above, we identified 30 demand flexibility programs. Of these programs, seven (23 per cent) are not included in DSM plans from utilities reviewed in the first section of this report. Programs included in our jurisdictional scan, but not this benchmarking, are mostly demand response or rebate programs administered by utilities that fell outside of our DSM plan review. This includes Hydro One's myEnergy Rewards and its new Flexibility Initiative, as well as a VPP pilot program in Edmonton's Blatchford neighbourhood offered via a partnership between Sonnen (battery supplier) and two utilities (EPCOR and Solartility).

Also excluded from our performance benchmarking are the competitive markets in Ontario and Alberta that secure capacity resources (i.e. IESO's capacity auction and AESO's Operating Reserve). Few utilities include rates in their DSM plans — exceptions

include BC Hydro's residential Time-of-Day Pricing and Fleet Electrification Overnight Rate; Hydro-Québec's Demand Response Option and Dual-Energy System Rates (Rate DT; Domestic Rate - Inukjuak System; Small- and Medium-Power); and Newfoundland Power's Curtailable Service Option.

Finally, while our jurisdictional scan captured programs active in 2025, the benchmarking below captures program activities in the most recent 12 months between January 1, 2024 and March 31, 2025. As such, this benchmarking may capture outcomes from programs that are no longer active, and it may also identify new programs that are not included in this benchmarking.

Below, we categorize capacity resources in two ways: as peak demand reductions from energy efficiency programs and as available capacity from demand flexibility programs. Peak demand reductions are long-term reductions achieved as the result of participation in energy efficiency programs coincident with peak demand. Capacity resources are generally a measure of the extent of peak demand reductions from demand flexibility programs which are available to the utility if 100 per cent of the expected resource is called upon. Methodology for measuring these capacity resources may be based on modelling or on real program results depending on the utility and metering infrastructure.

Table 11. Available capacity from demand flexibility programs and peak demand reductions from efficiency programs (2024)

Utility	Efficiency programs			Demand flexibility programs		
	Plan (MW)	Actual (MW)	% of peak demand	Plan (MW)	Actual (MW)	% of peak demand
Efficiency Manitoba/ Manitoba Hydro~	-	51.2	1.00	-	132.0	2.58
NB Power	83.0	20.6	0.64	-	80.9	2.51
SaskPower	2.2	1.7	0.04	-	73.0	1.90
BC Hydro	100.0	94.0	0.90	67.0	71.0	0.68
NL utilities*	-	15.1	0.85	-	11.5	0.65
IESO	255.6	213.0	0.89	123.0	112.0	0.47
Hydro-Québec	5.5	22.0	0.05	-	174.0	0.43
Efficiency Nova Scotia	25.6	30.7	1.47	10.0	8.1	0.39
FortisBC	7.6	6.7	0.82	2.2	1.7	0.21
Yukon Energy	-	-	-	-	0.2	0.16
efficiencyPEI*	5.6	6.0	1.66	-	-	0.00
Total	**485.1**	**460.9**	0.50	**202.2**	**664.4**	0.72

* Where 2024 peak demand was not available, we used the most recent peak demand reported.
~ Efficiency Manitoba administers efficiency programs that achieve peak demand reductions, and Manitoba Hydro administers the demand flexibility program (curtailable rates), which secures available capacity.

As was the case in our 2024 Scorecard Report, efficiencyPEI and Efficiency Nova Scotia reported the highest peak demand reductions from energy efficiency programs as a percentage of annual peak demand, with 1.66 per cent and 1.47 per cent, respectively — an increase of 0.14 per cent and 0.35 per cent year-over-year.[24] Efficiency Manitoba reported the third-highest peak demand reductions in 2024, achieving 1 per cent of peak demand, an increase of 0.61 per cent from the previous year.

Manitoba Hydro, NB Power and SaskPower reported the highest available capacity from demand response initiatives at 2.58 per cent, 2.51 per cent and 1.9 per cent of annual peak demand, respectively. These three utilities/program administrators also reported

[24] Nippard et al., *2024 Canadian Energy Efficiency Scorecard*.

the highest available capacity in our previous benchmarking mentioned above (when excluding available capacity from markets).

Equity and energy efficiency

Energy efficiency measures are widely understood to offer significant benefits beyond energy savings or greenhouse gas (GHG) emissions reductions. These include increased comfort, affordability, and reliability, which have associated effects on the mental and physical well-being of households, as well as the long-term resilience and safety of homes.

This is particularly true for marginalized and traditionally underserved communities, such as lower-income Canadians, Indigenous communities, and residents of social housing, who are often first to feel the disproportionate effects of the intersecting climate, cost of living, and housing crises. These communities also face a range of barriers that render conventional energy efficiency programming inaccessible or unavailable. Consequently, energy efficiency and demand-side management (DSM) program administrators have increasingly established specific market segments and program designs for marginalized and underserved groups.

This chapter presents the results of a comprehensive jurisdictional scan of energy efficiency programs targeting marginalized and/or underserved communities across Canada. We have also included 2024 performance benchmarking for utility DSM low-income and Indigenous community programming. The scope of this scan is wider than the utility DSM activities reviewed in the first section, is not limited to ratepayer-funded programs, and was carried out via desk research and conversations with program staff between July and October 2025.

The goal of this chapter is not to homogenize programming for low-income households, Indigenous communities and other marginalized or underserved groups into a single category, but to highlight the existing range of targeted energy efficiency programs that exist outside of conventional DSM initiatives at the provincial and territorial level. This chapter also aims to provide a high-level overview of some of the barriers, gaps in service, and developments in the field to better serve these distinct groups.

Program landscape

Efficiency Canada conducted a jurisdictional scan of provincial/territorial energy efficiency programs designed for low-income households across Canada in 2022.[25] We have updated and expanded this scan to include the following broad categories of energy efficiency programs that contribute to equitable outcomes:

- Income-qualified and income-based programs for low- to moderate-income (LMI) households.
- Programs for northern, remote, and First Nations, Inuit, and Métis communities
- Programs for social and affordable housing providers, but not income-based
- Programs for other underserved and/or marginalized populations, as outlined below.

The table below summarizes the number of programs identified in both jurisdictional scans by these fundamental, eligibility-criteria-based categories.[26]

Table 12. Efficiency programs with equity-oriented outcomes, by eligibility type (2024) [27]

Year of jurisdictional scan	LMI	Northern, remote, Indigenous	Affordable housing providers	Other	**Total**
2025	36	25	11	4	**76**
2022	29	n/a	10	1	**40**

[25] Kantamneni and Haley, *Efficiency for All*.

[26] This scan focuses on provincial and territorial-level programming and thus does not account for municipal, local or grassroots efforts to improve home energy efficiency. We have not included bill payment programs, arrears forgiveness programs, emergency assistance programs, or general rebate programs and other energy efficiency offers that are not explicitly designed for marginalized or low-income households.

[27] In many cases, programs are designed to serve households or groups that may "fit" multiple categories. To limit double counting, we have attempted to categorize programs by their primary audience, but they are not mutually exclusive in reality. Programs for housing providers are often also eligible for Indigenous Governing Bodies. Select income-based programs also waive eligibility for Indigenous households or deliver enhanced offers.

While programs for LMI households; northern, remote, and Indigenous communities; and affordable housing providers were most common, the scan also identified and included four other programs that target marginalized and/or underserved groups. These were immigrant and newcomer households (EmPower Me), African Nova Scotian households (African Nova Scotian Communities Retrofit Pilot), persons who experienced barriers to employment (Residential Energy Efficiency Works), and clients of a BC regional health authority's Home Care Program or Mental Health and Substance Use Program (BC Free Portable Air Conditioners).

The development and delivery of these programs are often collaborative efforts between a primary program administrator and its partners, such as community organizations, program delivery agencies, advisory bodies, persons with lived experience, and Indigenous Governing Bodies (IGBs). These partnerships help create more accessible and/or culturally relevant programming. In our outreach, administrators of programs for northern, remote, and Indigenous communities in particular noted the necessity of forming partnerships and building relationships in-community for driving program participation.

In the chart below, we have attempted to categorize programs by the primary administrator, defined as the organization most directly responsible for managing funds, supervising work, and recording and reporting on outcomes. We grouped these into three categories: utility DSM administrators; provincial, territorial or federal government departments; and non-profit organizations, social enterprises, and IGBs.

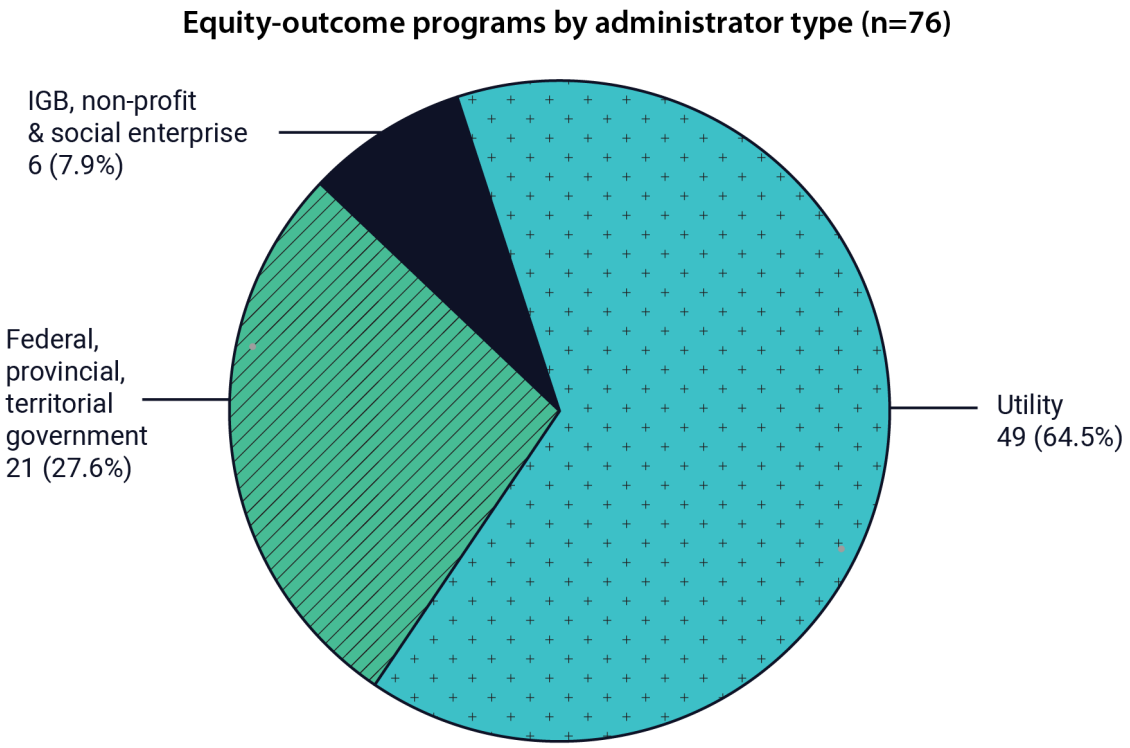

Figure 9. Number of equity-oriented programs by administrator type (2024)

According to this classification, utilities administer roughly two-thirds of efficiency programs with equity outcomes. Three of the primary administrators identified in this scan were IGBs or Indigenous-led organizations (Coastal First Nations - Great Bear Initiative, New Relationship Trust and Nunatsiavut Government). Non-IGB administrators of programs for Indigenous communities directly partner with Indigenous-led organizations, hire and train staff in-community, and/or consult and receive direction from an advisory body. Similar approaches are employed by administrators of other programs for culturally distinct groups, such as Kambo Energy Group's Empower Me program and Efficiency Nova Scotia's African Nova Scotian Communities Retrofit program. It should be noted that administration of programs does not necessarily align with the underlying funding source.

Funding

Funding is a pivotal factor in the availability and depth of programs for marginalized and underserved groups. While most utility-administered DSM programming is funded by ratepayers, utilities may receive limited-term funding from governments (provincial,

territorial or federal) to support equity-oriented programming. Programs administered by entities other than utilities are also often funded in part by government transfers. Diversified funding portfolios can offer flexibility in program delivery, broader program mandates and, for many jurisdictions, funding for strategic electrification.

The figure below summarizes program counts by type and funding source. We distinguish between seven different program types based on delivery method, included measures and intended outcome.[28] Ratepayer funding contributes to slightly more programs than government funding — 66 per cent versus 59 per cent, respectively. Programs funded entirely by ratepayers accounted for 38 per cent of all programs identified. Nearly three-quarters of deeper upgrade programs were supported by government funding in 2024.[29]

[28] Program types based on our 2022 jurisdictional scan of energy efficiency programs for low-income households. For descriptions of program categories, see pages 20–24 of *Efficiency for All.*

[29] Deeper upgrade programs include all that are direct install with major upgrade (18), custom multi-unit programs for existing buildings (six), and supplemental programs that offer major upgrades and repairs to building structures, sealing, electrical, and heating systems (seven).

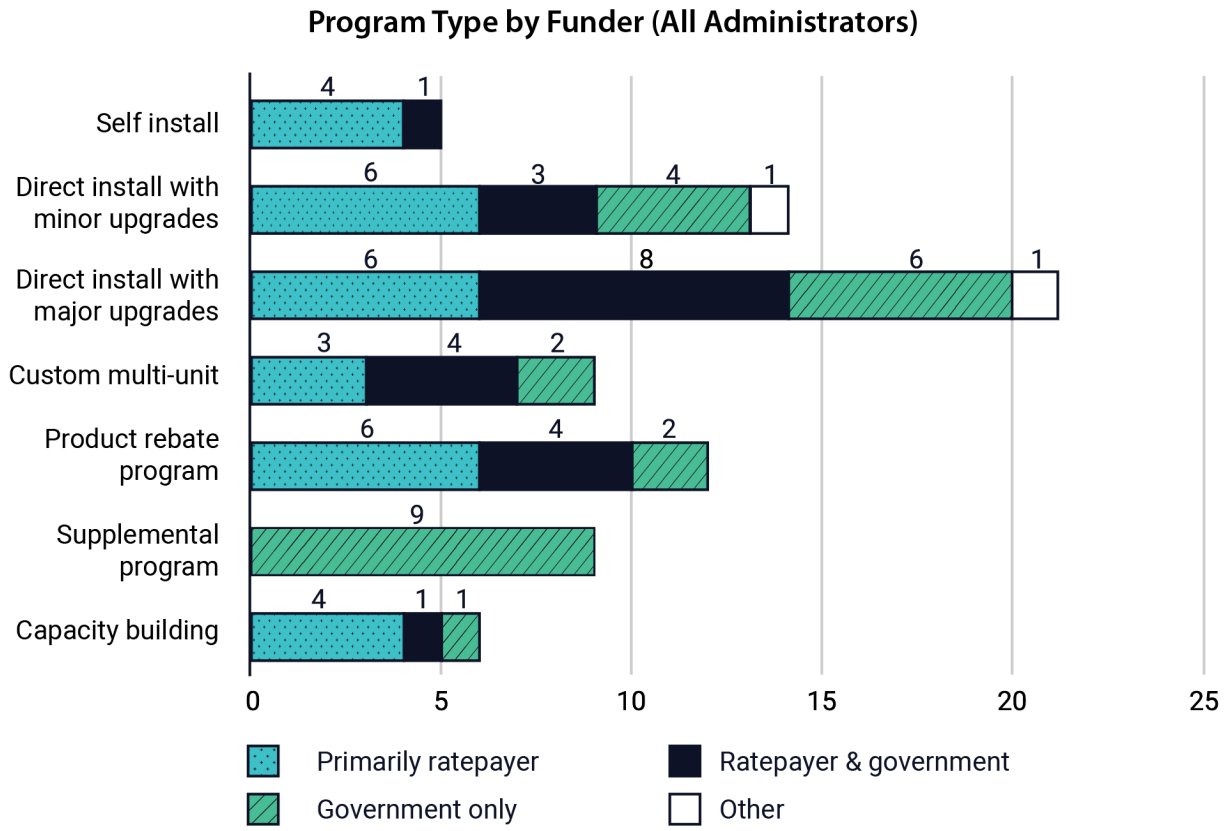

Figure 10. Equity-oriented program types by dominant source(s) of funding (2024)

Efficiency Canada research indicates that federal programs, such as the Oil to Heat Pump Affordability program (OHPA), Low Carbon Economy Fund (LCEF) and Future Electricity Fund (FEF) have helped to scale up efficiency programming with equity outcomes across Canada.

Between 2023 and 2024, 21 new programs were launched across the country.[30] Eight of these new programs were launched in 2024, including the first income-targeted energy efficiency program in Yukon (Affordable Heat Pump Program) and the Nunatsiavut government's Nunatsiavut Energy Efficiency Rebate Program. At least six of these were enabled by government contributions at the federal, provincial and territorial levels. Conversations with program administrators indicated that for several programs with

[30] This includes four for affordable and social housing providers; seven for low-income households; eight for northern, remote, and Indigenous communities; one for African Nova Scotian households; and one for persons who are part of BC regional health authority home care or Mental Health and Substance Use programs.

multiple funding streams, provincial, territorial and/or federal contributions often outweighed ratepayer contributions.

Yukon's Affordable Heat Pump Program is supported by federal funding streams (OHPA and LCEF). Efficiency Nova Scotia's HomeWarming program, through federal and provincial contributions via OHPA and the Home Heating Oil Transition fund, in addition to ratepayer funding, increased participation five-fold compared to 2023 levels. It ensured continued service to oil-heated homes, which remain a key contributor to the province's high levels of energy poverty.[31] SaskPower's Energy Assistance Program (income-qualified) and Northern First Nations Home Retrofit programs are predominantly funded through a return of Saskatchewan Carbon Tax dollars. While not an administrator of OHPA, SaskPower adjusted its income eligibility criteria to align with OHPA thresholds to simplify the administrative process and maximize potential participation.

Two programs were also launched in Alberta in 2023 to support low- to moderate-income households and Indigenous communities. Indigenous Services Canada launched the Alberta Indigenous Clean Energy Initiative in 2023, which supports renewable energy generation and energy efficiency projects that serve First Nation and Métis communities in Alberta. Kambo Energy Group, with the support of various funders, also launched the Home Upgrades Program to provide free energy efficiency upgrades to eligible households.

While federal funding streams have been especially major enablers of energy efficiency programming for underserved groups in recent years, fluctuations in availability and regularly changing political priorities can significantly disrupt the availability of these programs. In 2024, the Arctic Energy Alliance was not able to reoffer its recently established Designated Income Home Winterization program due to delays in funding delivery for the second phase of the federal government's Low Carbon Economy Leadership Fund in 2024 and 2025.

Depth and accessibility

The progression of programming for more equitable outcomes is often to mature over time from basic, light-touch measures like energy savings kits toward deeper (i.e.,

[31] Colton, Roger D. *A Way Forward: A Made in Nova Scotia Home Energy Affordability Program.*

comprehensive, multiple improvements at once) and/or major upgrades. This can also be accomplished by directing participants through a series of programs that lead to deeper retrofits and major upgrades. Ideally, these programs are direct install and turnkey, which is often necessary to overcome the unique barriers to program accessibility faced by these communities.

Program administrators also reported that harmonizing eligibility criteria and/or automatically qualifying participants for deeper upgrade programs were successful strategies for reducing barriers to access. We also heard that funding availability, non-regulated fuel policy, cost-effectiveness testing, and contractor availability are important factors in an administrator's ability to offer deeper upgrades.

As noted in the funding section above, the most common type of program identified in our scan was direct-install programs that offer major upgrades, though they make up a small fraction of all programs (21 out of 76). The majority of these programs offer upgrades to home heating systems and/or insulation alongside prescriptive energy efficiency products such as LED lighting, draft proofing and smart thermostats that are regularly included in direct install with minor upgrade and self-install programs. Access to these programs varies by province and target group. Similar programs for multi-unit buildings are available. Of the nine custom multi-unit programs identified, five offered major upgrades for existing buildings. The table below indicates the availability of at least one direct install, major upgrade program (or custom major upgrades for multi-unit programs) by region and targeted group.

Table 13. Direct install, major upgrade, and custom multi-unit upgrade programs by province and targeted group

Province/Territory	Low income	Northern, remote, Indigenous	Affordable housing	Other
AB	•	•		
BC	•	•	•	
MB	•	•		
NB	•	•		
NL	•	•		
NS*	•	•	•	•
NT				
NU				
ON	•	•	•	
PE	•	•		
QC			•	
SK				
YT				

* While there is an income eligibility threshold for the African Nova Scotian Communities Retrofit Pilot, it has been categorized as a program for other marginalized and/or underserved groups as incentives and support may still be available for above-moderate-income households.

While we found a greater number of major upgrade programs for northern, remote, and Indigenous communities (11 in total), there is wider geographic availability of these programs for low-income households. A greater proportion of all programs for northern, remote, and Indigenous communities are direct install, major upgrade (44 per cent) than for low income (25 per cent). Few provinces offer deeper upgrade programs for affordable housing providers.

Nearly all of the active programs for northern, remote and Indigenous communities launched in 2019 or later.[32] Exceptions include Efficiency Nova Scotia's Mi'kmaw Home Energy Efficiency Project (2018), the BC First Nations Clean Energy Business Fund (2010), and Newfoundland and Labrador Hydro's Isolated Communities Energy Efficiency Program (ICEEP) (2010). The ICEEP program exemplifies the progression toward deeper improvements, having graduated from direct-install kits and minor upgrades to deeper retrofits, including heat pump installation, for residential and commercial customers in isolated diesel communities. Program administrators noted maturity of the program, consistent funding and a limited population as key factors in its growth and development.

Our scan finds that there are no turnkey, deeper retrofit or major upgrade programs available in Saskatchewan for marginalized and/or underserved groups. Major upgrade programs in Québec were only available to affordable housing providers. Eight programs in the deeper retrofits category target affordable housing providers (available in British Columbia, Ontario, Nova Scotia and Nunavut), three of which were to incentivize higher levels of energy efficiency in new construction projects (Nunavut's Supported Housing Capital Program, Efficiency Nova Scotia's Affordable Rental Construction Pilot, and Enbridge Gas' Savings by Design Affordable Housing Program). In 2024, no direct install, major upgrade programs included long-term maintenance, repairs or replacements to new heating equipment as a part of their offerings. FortisBC and SaskEnergy both offer coupons and maintenance rebates for gas furnaces. Administrators such as Efficiency Manitoba, FortisBC, and BC Hydro have upgraded programs since 2024 to include long-term maintenance and repairs for recipients of heat pumps and dual fuel heating systems (where applicable) through their programs.

All seven programs offering major upgrades in the territories were supplemental and do not have explicit energy efficiency mandates, but rather offer assistance with major home repairs, including insulation and heating systems. These programs are government-administered avenues for lower-income homeowners to upgrade and maintain their homes. This can improve the energy efficiency of their building envelope but places more onus on homeowners or contractors to opt for higher-efficiency

[32] Several active programs are successors of retired programs with similar mandates and/or include years of pilot testing prior to their official launch that are not reflected in the timeline captured in the jurisdictional scan conducted for this report.

materials and appliances. Such programs are regularly accessed in emergency situations when maximizing home efficiency is likely to be less of a priority. Supplemental programs are also offered in PEI and Newfoundland and Labrador by provincial housing agencies. In both PEI and Newfoundland and Labrador, other energy efficiency programs are offered by either provincial departments or utilities.

We found 23 programs in our scan that were available to renters, two of which were offered to both renters and affordable housing providers (Énergir's Supplément ménages à faible revenu and Enbridge Gas' Home Winterproofing Program). Twelve of these programs were accessible to renters who live in multi-unit residential buildings. The majority of renter-friendly programs (14) were self-install or direct install with minor upgrade programs. Efficiency Nova Scotia's Affordable Multi-family Housing Program, Enbridge Gas' Home Winterproofing Program, and Efficiency Manitoba's Energy Efficiency Assistance Program and enhanced Métis Energy Efficiency Offers all include possible major upgrades for renters.

In this scan, we identified six capacity-building programs offered by program administrators, including FortisBC's Residential Energy Efficiency Works program, the Indigenous Climate Action Network program in BC, and Efficiency Manitoba's Indigenous Community Energy Efficiency Program and Community Heat Pump Program. These programs seek to offer training and/or salary support that builds local capacity to enable energy efficiency upgrades. Capacity-building components are also evident in other programs. BC Hydro and FortisBC's ICCP offers training and salary support to community members to carry out minor upgrade installations. Kambo Energy Group's EmpowerMe Program hires and trains energy mentors from the newcomer and immigrant communities they support to deliver workshops, attend community engagement events, and offer in-language coaching. There is a greater span of capacity-building programs in Canada than identified in this report; however, we found it important to highlight the increase in capacity-building programs and components that are being built into energy efficiency program design to offer more comprehensive and wraparound service for underserved communities.

Eligibility

For income-qualified programs, income threshold criteria remain a barrier to participation as most thresholds are arbitrary cut-offs and will almost always exclude

some portion of households that would benefit from the program. We explore these metrics in depth in our report Efficiency For All. Table 14 provides an overview of the spread of metrics and thresholds that exist across jurisdictions.

Table 14. Income-qualified equity-outcome programs by eligibility criteria

Income eligibility threshold	Program Name	Administrator	Alternative eligibility available
Low income cut-off (LICO)			
LICO X 130%	*All-In Attic Insulation Program*	NL Power	
LICO X 135%	*HomeWarming Program*	Efficiency Nova Scotia	
LICO X 145%	*Métis Energy Efficiency Offers*	Efficiency Manitoba	✓
	Energy Efficiency Assistance Program		✓
	First Nations Energy Efficiency Program		✓
LICO X 150%	*Energy Assistance Program*	SaskPower	
LICO X 160%	*Energy Savings Kits (Low Income)*	BC Hydro, FortisBC	
	Energy Conservation Assistance Program (ECAP)	BC Hydro, FortisBC	✓
	Income Qualified Rebates Programs	FortisBC	
LICO X 200%	*Home Upgrades Program*	Kambo Energy Group	
> LICO*	*Éconologis (Volet 1)*	Government of Québec	✓
	Energy Savings Program	Clean BC	✓

Absolute baseline			
< $32,500	*Home Energy Savings Program*	Newfoundland and Labrador Housing Corporation	
	Provincial Home Repair Program		
< $35,000	*Home Insulation Rebates - Low Income*	efficiencyPEI	
	Energy Efficient Equipment Rebates - Low Income		
< $50,000	*PEI Home Renovations Program*	PEI Dept. of Environment, Energy and Climate Action	
	Winter Warming Program	efficiencyPEI	
< $68,000 (BT)	*Tune-up Assistance Program*	SaskEnergy	
< $70,000	*Energy Savers Kit*	Take Charge NL (NL utilities)	
Low income measure (LIM)			
(LIM X 115%) X 120%	*Volet Supplément ménages à faible revenu*	Énergir	✓
	Volet Supplément ménages à faible revenu - Affaires		
LIM X 135%	*Home Winterproofing Program*	Enbridge Gas	
	Energy Affordability Program: Tier 1	IESO	✓
LIM X 165%	*Energy Affordability Program: Tier 2*	IESO	

Context specific			
CMHC core housing need threshold	*Seniors Aging-in-Place Program*	Northwest Territories Housing Corporation	
	Preventative Maintenance Program		
	Homeownership Repair Program		
	Seniors Home Repair Program		
	Home Renovation Program	Nunavut Housing	
Household income limit	*Enhanced Energy Savings Program*	NB Power	
Affordable housing income limit	*Home Repair Program*	Government of Yukon	✓
OHPA criteria	*Affordable Heat Pump Program*	Government of Yukon	✓
	African Nova Scotian Communities Retrofit Program	Efficiency Nova Scotia	
Income based			
	Elders Housing Program	Nunavut Housing	✓

* We were unable to identify or verify the underlying metric for either of these programs. All offers' income thresholds based on the number of persons per household are higher than LICO in the largest city in their province.

Several program administrators reported revisions to their income qualification criteria to expand program reach to more customers and/or align with complementary or similar home upgrade options in the region. Impetus for these expansions varied by administrator.

British Columbia amended the BC Utilities Commission Act in 2023 to increase the low-income household from LICO x 1.3 to LICO x 1.6.[33] Efficiency Nova Scotia increased income eligibility in recent years from LICO x 115% to LICO x 135%. Newfoundland and Labrador's takeCHARGE Energy Savers Kits similarly uses LICO as a reference point and has expanded eligibility over time to serve as many households within their limited service region as possible. Efficiency Manitoba increased the income eligibility from LICO X 125% in 2022 to LICO x 145% for the Energy Efficiency Assistance Program (EEAP).[34] The IESO reviews income cut-offs for the Energy Affordability Program annually and adjusts thresholds for inflation. In Prince Edward Island, efficiencyPEI and the provincial Office of Net-Zero are working to align eligibility criteria across programs and with the OHPA criteria, as Yukon's Affordable Heat Pump Program and Efficiency Nova Scotia's African Nova Scotian Communities Retrofit Program have already done.

Of the 31 income-qualified programs included in our scan, 11 offered alternative methods to display eligibility, including enrollment in other income-qualified programs offered by the administrator, or proof of participation in other social assistance programs such as disability benefits, employment insurance, or the national child benefit supplement. The Tune Up Assistance Program offered by SaskEnergy was the only income-qualified program identified to operate entirely on a self-declaration model with no verification or proof of income required.

Recent developments

Our jurisdictional scan was limited to program availability and details for 2024. In 2025, a number of developments took place that have changed the eligibility, delivery methods, funding capacity and/or offerings available through the programs included in our scan. While we are not able to comment on all developments due to the limited scope of this report, we have noted a few of the larger program developments from 2025 that were raised in conversation with program administrators, below.

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[33] B.C. Reg. 167/2023, Ministerial Order M193/2023.

[34] Efficiency Manitoba, "Efficiency Manitoba expands income eligibility for its Energy Efficiency Assistance Program." In an effort to reduce application and eligibility barriers, EEAP is an "income-based" program and will not turn applicants away who may surpass the threshold by 10–15 per cent. EEAP has also partnered with local neighbourhood renewal corporations in Winnipeg to automatically qualify entire neighbourhoods for the program and also takes enrollment in other income-qualified programs.

In 2025, Clean BC, FortisBC and BC Hydro launched the Partners in Indigenous Energy Efficiency & Resilience program. This works to streamline energy efficiency offers for First Nations communities into a single comprehensive upgrade program with some expanded offers.

BC Hydro also exited from the Social Housing Retrofit Support Program in 2025 and now offers the Social Housing Energy Savings Program for electrical energy efficiency, managed by BC Hydro, to support social housing customers.

SaskEnergy launched the new Heating Affordability Program, succeeding the Tune-up Assistance Program, which now targets existing participants of SaskPower's Energy Assistance Program to replace low-efficiency furnaces with high-efficiency furnaces at no cost to the participant.[35] This program combines offers for low-income households in Saskatchewan into a single application process through the EAP for participants.

Manitoba was the first province to reach an agreement with the federal government and implement the Canada Greener Homes Affordability program.[36] This new funding will support income-qualified Manitobans through the Energy Efficiency Assistance Program and Métis Energy Efficiency Offers to access direct-install upgrades including air sealing, insulation and heat pumps at no cost to the household (renter or homeowner). The Affordable Home Energy Program which previously offered income-based loans for ground-source and air source heat pumps will also now be able to provide these systems entirely free of charge. More announcements in other jurisdictions are anticipated.

Yukon also recapitalized its Low Carbon homes program in 2025 which supports building envelope upgrades and some heat pump installations to First Nations government-owned homes and social housing operated by the Yukon government.

Several administrators expanded their eligibility criteria for income-qualified programs. The Newfoundland and Labrador Housing Corporation increased eligibility for Home Energy Savings Program and Provincial Home Repair from $32,500 to $42,500 and $65,000 for all of Labrador. The IESO adjusted income-verified programs for inflation

[35] SaskEnergy, "SaskEnergy Introduces New Heating Affordability Program."

[36] Efficiency Manitoba, "Canada Launches Greener Homes Affordability Program in Manitoba."

(around 2 per cent). NL Power has increased the income threshold for the All-In Attic Insulation program to $70,000 or less.

2024 DSM performance benchmarking

This section reports on low-income programming and programs for northern, remote and Indigenous communities administered through utility DSM activities.[37] As in our review of DSM plans above, this includes only programs clearly demarcated by the utility as serving these communities and does not include programs administered by other entities (e.g., government) or outside of DSM.[38] Results are for the most recent 12-month period for each utility (i.e., the same period as the total spending and saving benchmarking presented above). Per capita spending is also excluded in this analysis.

Our jurisdictional scan identified 76 programs.[39] The majority of these programs (62 per cent) were offered by DSM administrators and funded at least in part by ratepayer funding. Programs included in DSM plans and/or annual reports are considered to be within DSM.

Table 15. Equity-oriented included in DSM, by target audience

	LMI	Northern, remote, Indigenous	Affordable housing providers	Other
Included in DSM	20	19	7	1
Not included in DSM	16	6	4	3

[37] Programs for other underserved and/or marginalized groups identified in our jurisdictional scan — including newcomer and immigrant households, seniors, and African Nova Scotian households — did not receive funding through utility DSM.

[38] The range of programs included in these categorizations may differ by utility and could include off-grid programs.

[39] Some exceptions apply, including the Home Upgrades Program in Alberta that only offers service in partnering municipalities. Other programs included are in their pilot phase and/serve a distinct cultural group and may also be restricted to a certain geographic region (e.g., Winterization Walkthrough Program, African Nova Scotian Communities Retrofit pilot, Nunatsiavut Energy Efficiency Retrofits program).

Table 16. 2024 Equity-oriented program spending

Utility	Low income ($M)		Northern, remote, Indigenous ($M)		Total ($M)	% of portfolio
	Plan	Actual	Plan	Actual		
BC Hydro†	37.5	32.6	7.2	5.4	37.9	24.0
FortisBC‡	1.7	1.4	-	-	1.4	9.8
FortisBC Energy	8.4	12.3	2.7	1.3	13.6	8.5
IESO~	87.0	99.9	16.4	9.7	109.6	22.7
SaskEnergy	-	0.7	-	0.2	0.8	9.18
SaskPower	-	2.5	-	3.8	6.3	60.0
Efficiency Manitoba	12.0	8.3	4.3	4.6	12.9	17.4
Enbridge	24.6	32.7	-	-	32.7	10.8
Hydro-Québec†	1.0	0.5	2.9	0.9	1.4	0.3
Énergir	0.8	0.3	-	-	0.3	0.6
NB Power	15.4	104.2		1.8	106.0	61.0
Efficiency Nova Scotia*	10.7	15.4	1.2	1.2	16.5	25.1
efficiencyPEI	-	0.9	-	-	0.9	11.1
NL utilities†	0.5	0.4	1.0	1.0	1.4	15.2
Total	**199.5**	**311.9**	**35.7**	**29.9**	**341.7**	**16.9**

* Estimate using the Mi'kmaw Home Energy Efficiency Project spending for northern, remote and Indigenous. Spending totals include both spending on targeted programs and incidental spending on low-income households through non-targeted Residential and Business, Non-profit, and Institutional programming. Incidental spending accounts for $6.1million of total spending on Low-Income and Underserved Communities in 2024.
~ Does not include LI beneficial electrification;
† Includes entire non-integrated systems budget. BC Hydro Low Income category includes data from both the Low Income residential portfolio and Social Housing commercial program.
‡ FortisBC budget for Indigenous program spending embedded in Low Income portfolio figures

Efficiency Canada's tracking shows a significant increase in investment in programs for low-income households and Indigenous communities between 2023 and 2024. Based on our 2024 Scorecard results,[40] we estimate that this same selection of utilities spent

[40] Our methodology for tracking energy efficiency program spending and savings differs between our biennial Scorecard report and 2024 utility DSM tracking. The evolution in our data collection processes means that it is not possible for all program administrators to identify the portion of DSM spending for these programs (e.g., efficiencyPEI).

approximately $152 million programming for lower-income households and Indigenous communities in 2023 — $140.8 million on low-income programs, and $11.4 million on programs for Indigenous communities. This is roughly a 45 per cent increase, year-over-year.

These figures include partial spending on programs for affordable housing providers as some utilities include these programs in their low-income portfolios (e.g., Enbridge Gas' Affordable Mulit-Residential Housing Program, Efficiency NS' Affordable Multi-Family Housing Rebate Program, Énergir Low Income Household Supplement - Business Stream) while others, are reported as part of a separate portfolio (e.g., Enbridge Gas' Savings by Design Affordable Housing Program; FortisBC's Commercial Product Rebates - Heating System Optimization for Social Housing; and BC Hydro and FortisBC's Social Housing Retrofit Support Program).

Spending on equity-oriented programs for underserved and marginalized groups in Ontario increased by approximately 1.6 times between 2023 and 2024. This was driven primarily by increases in spending on low-income programming by the IESO ($99.9 million in 2024 versus $29.2 million in 2023). The IESO reported that its highest participation rates to date for the Energy Affordability Program were achieved in 2024, largely due to the maturity of the program and increased marketing budget. Cold climate air-source heat pumps were also included in program EAP offerings at the end of 2023, which additionally contributed to high interest and participation in the program.

Efficiency Manitoba similarly reported the highest participation rates to date for its income-based programs. Ongoing partnerships with local renewal corporations, Manitoba Non-Profit Housing Association, and contractor networks were reported as key to the success of the programs in addition to a high emphasis on flexibility and enabling strategies within program design. Both the IESO and Efficiency Manitoba programs were predominantly ratepayer-funded in 2024.

Efficiency Nova Scotia's results are based solely on electricity DSM programming. They do not include programs funded by other sources but administered by Efficiency Nova Scotia that target non-regulated fuels. These results also do not include the African Nova Scotian Communities Retrofit program included in our jurisdictional scan and later analysis of total programs available to underserved communities.

Québec DSM administrators (Énergir and Hydro-Québec) spend the lowest per cent of their DSM budgets on income-targeted programs and do not currently offer any programs specifically for Indigenous communities (the spending list for Hydro-Québec is for its autonomous, off-grid, networks program, which does serve Indigenous communities).

Conclusion

This report provided an overview of utility DSM plans and programs active in 2024 and 2025, as well as benchmarking for DSM portfolio performance. Additionally, we presented summary results of two comprehensive jurisdictional scans: demand flexibility initiatives and efficiency programs with equitable outcomes.

For utility DSM, we observed a continuation in a long-term positive trend in program budget and targeted energy savings. Spending doubled between 2023 and 2024, and annual energy savings neared 1 per cent of domestic sales for electricity and 0.65 per cent for natural gas. On-demand flexibility, we found that Canadian program administrators are beginning to introduce new and innovative options but are generally behind leading utilities in the U.S.

Finally, on programs with equity outcomes, we noted the need for future research. While this report discussed the availability of programs, initiatives to reduce barriers to access, and other enabling strategies, it is beyond the scope of this research to report on the efficacy of these strategies in providing practical community benefits. Measurements of program success and effectiveness are difficult to capture given the range of non-energy benefits and mandates of these programs that span beyond energy savings, GHG emissions reductions, or even affordability. Additionally, many of these programs are still early in their development. Further research is needed to better understand the long-term impact of these programs on underserved households and communities.

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Appendix A: Utility DSM data sources

Utility	DSM plan	2024 DSM results
BC Hydro	Fiscal 2026 to 2027 Revenue Requirements, https://www.bcuc.com/OurWork/ViewProceeding?applicationid=1337	Report on Demand-Side Management Activities for Fiscal 2025, https://www.bchydro.com/content/dam/BCHydro/customer-portal/documents/corporate/regulatory-planning-documents/regulatory-filings/reports/2025-07-11-f2025-dsm-activities-report.pdf
Efficiency Manitoba	Amended 3-Year Energy Efficiency Plan Application, https://www.pubmanitoba.ca/v1/proceedings-decisions/appl-current/pubs/2020-em-3-yr-plan/amended-2020-23-efficiency-manitoba-plan-april-1-2020.pdf 1 year extensions, Annual business plans, https://efficiencymb.ca/document-library/	Information request
Efficiency Nova Scotia	2023-2025 DSM Resource Plan, Matter No: M10473, https://uarb.novascotia.ca/fmi/webd/UARB15	2024 DSM Annual Progress Report, M12186, https://uarb.novascotia.ca/fmi/webd/UARB15
efficiencyPEI	PEI Energy Corp Electricity Efficiency & Conservation Plan, Docket no. UE41401, https://irac.pe.ca/electric/ue41401/	Information request

Enbridge	2022 - 2027 DSM Plan application, Decision and Order, https://www.rds.oeb.ca/CMWebDrawer/Record/761467/File/document	2024 DRAFT DSM Annual Report, https://engagewithus.oeb.ca/natural-gas-conservation-evaluation-advisory-committee/widgets/149848/documents
Énergir	Plan Global en Efficacité Énergétique, Horizon 2024-2026, Appendix J, Document 2, Case No. R-4213-2022, https://www.regie-energie.qc.ca/fr/participants/dossiers/R-4213-2022/doc/R-4213-2022-B-0061-Demande-Piece-2023_03_31.pdf	Annual Report, Sept 30 2024, Appendix 13, https://www.regie-energie.qc.ca/fr/participants/dossiers/R-4288-2024/doc/R-4288-2024-B-0082-Dem-Piece-2025_01_07.pdf
FortisBC	2023 to 2027 Demand-Side Management Expenditures Plan, https://www.bcuc.com/OurWork/ViewProceeding?applicationid=1016	Electricity Demand-Side Management Programs 2024 Annual Report, https://www.cdn.fortisbc.com/libraries/docs/default-source/about-us-documents/regulatory-affairs-documents/electric-utility/250331-fbc-2024-dsm-annual-report-ff.pdf?sfvrsn=b80f88a6_1
FortisBC Energy	2024-27 Demand Side Management Expenditures Plan, https://www.bcuc.com/OurWork/ViewProceeding?applicationid=1131	2024 FEI Annual Demand Side Management Report, https://www.fortisbc.com/about-us/corporate-information/regulatory-affairs/our-gas-utility/gas-bcuc-submissions/fortisbc-energy-inc.-gas-submissions/C-DS-EM/annual-dsm-reports
Hydro-Québec	R-4270-2024, https://www.regie-energie.qc.ca/fr/participants/dossiers/R-4270-2024/doc/R-4270-2024-B-0027-Dem-Piece-2024_08_01.pdf	Annual reporting under Energy Board Act 75, https://www.regie-energie.qc.ca/fr/participants/dossiers/R-9001-2024/doc/R-9001-2024-B-0009-RapAnnuel-Pieces-2025_05_26.pdf

IESO	2025-2027 Electricity Demand-Side Management Program Plan (with Beneficial Electrification), https://www.ieso.ca/-/media/Files/IESO/Document-Library/eDSM/2025-2027-DSM-Plan-with-Beneficial-Electrification.pdf	Information request
NB Power	2024-25 to 2026-27 DSM Program Initiatives Update, Appendix AHi of 2024-2025 General Rate Application, Matter no. 0552, https://filemaker.nbeub.ca/fmi/webd/NBEUB%20ToolKit13	Information request
NL Power, NL Hydro	2021 Electrification, Conservation and Demand Management Application, http://www.pub.nf.ca/applications/2021/NP2021Capital_SUPP_Electrification/index.htm	Conservation and Demand Management Reports, http://www.pub.nf.ca/indexreportspages/conservation.php
SaskEnergy	n/a	Information request
SaskPower	n/a	Information request

Appendix B: Program administrators by jurisdiction and report section

Jurisdiction	Initiative administrator	Report section
Alberta	ATCO Alberta	Demand flexibility
	EPCOR, Solartility, Sonnen	Demand flexibility
	Indigenous Services Canada	Equity-oriented
	Kambo Energy Group	Equity-oriented
British Columbia	BC Hydro	Demand-side management; Demand flexibility; Equity-oriented
	FortisBC	Demand-side management; Demand flexibility; Equity-oriented
	FortisBC Energy	Demand-side management; Equity-oriented
	Government of British Columbia (Clean BC)	Equity-oriented
	Kambo Energy Group	Equity-oriented
	New Relationship Trust	Equity-oriented
	Coastal First Nations - Great Bear Initiative	Equity-oriented
Manitoba	Efficiency Manitoba	Demand-side management; Equity-oriented
	Manitoba Hydro	Demand flexibility
New Brunswick	NB Power	Demand-side management; Demand flexibility; Equity-oriented

Newfoundland and Labrador	Newfoundland and Labrador Hydro	Demand-side management; Demand flexibility; Equity-oriented
	Newfoundland and Labrador Housing Corporation	Equity-oriented
	Newfoundland Power	Demand-side management; Demand flexibility; Equity-oriented
	Nunatsiavut Government	Equity-oriented
Northwest Territories	Arctic Energy Alliance	Equity-oriented
	Northwest Territories Housing Corporation	Equity-oriented
Nova Scotia	Efficiency Nova Scotia	Demand-side management; Demand flexibility; Equity-oriented
	Nova Scotia Power	Demand flexibility
Nunavut	Nunavut Housing	Equity-oriented
Ontario	Enbridge	Demand-side management; Demand flexibility; Equity-oriented
	Hydro One	Demand flexibility
	IESO	Demand-side management; Demand flexibility; Equity-oriented
	Ontario Energy Board	Demand flexibility
Prince Edward Island	efficiencyPEI	Equity-oriented
	Government of Prince Edward Island	Equity-oriented
	Maritime Electric	Demand flexibility
	Summerside Electric	Demand flexibility
Québec	Énergir	Demand-side management; Demand flexibility; Equity-oriented
	Government of Québec	Equity-oriented

Saskatchewan	SaskEnergy	Demand-side management; Equity-oriented
	SaskPower	Demand flexibility; Equity-oriented
Yukon	Government of Yukon	Demand flexibility; Equity-oriented
	Yukon Energy	Demand flexibility