

Participant's Guide

ENERGY EFFICIENCY: FEASIBILITY STUDIES
AND IMPLEMENTATION INCENTIVES PROGRAMS

MAJOR INDUSTRIES



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Gaz Métro offers energy efficiency programs to its customers as part of its Energy Efficiency Plan.

This *Participant's Guide* is intended for customers who wish to participate in the Energy Efficiency: Feasibility Studies and Implementation Incentives Programs. It explains the steps to follow to make a request for financial assistance, as well as the admissibility criteria for each component of the programs.

The Guide also includes the forms required to make a request for financial assistance, and Gaz Métro encourages participants to submit their requests electronically, along with the supporting documentation.



These conditions for participation are in effect from **October 2015**. However, Gaz Métro reserves the right to modify or terminate the program at any time without prior notice. Gaz Métro also reserves the right to interpret the terms and conditions of the program.



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For more information, please consult:

- Your Major Industries representative;
- the [Gaz Métro Internet site](#);
- one of the Program Managers:

Guy Desrosiers, Eng., CEM[®], CMVP

Advisor, Technologies & Energy Efficiency,
Telephone: 514 598-3779

gdesrosiers@gazmetro.com

Marie-Joëlle Lainé, Eng., CEM[®], CMVP

Advisor, Technologies & Energy Efficiency,
Telephone: 514 598-3507

mlaine@gazmetro.com

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To submit a request, or for any administrative information regarding an application:

By e-mail:

By mail:

Gaz Métro

Energy Efficiency

1717 du Havre

Montréal QC H2K 2X3

By fax: 514 598-3700

Secretariat: 514 598-3410



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Description and objective of the programs

Energy Efficiency: Feasibility studies and implementation incentives programs. These Gaz Métro programs are divided into two components.

The **Feasibility Studies** component helps defray part of the cost of a feasibility study covering energy efficiency measures. The study will be carried out by an engineering consulting firm accredited by Gaz Métro. The list of firms is available on www.gazmetro.com. The study may also be carried out by an engineer in the employ of the customer.*

List of firms

The **Implementation Incentives Program** is aimed at rationalizing the consumption of natural gas through measures not eligible for one of Gaz Métro's high-efficiency appliance programs.

These measures will have been studied and evaluated beforehand by an engineer member in good standing of the *Ordre des ingénieurs du Québec*, or under the direction and immediate supervisor of an engineer with full practice rights in Québec, before being submitted to the Gaz Métro Program Manager for analysis and approval.

The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).

Payment of the financial assistance should not be interpreted as a guarantee to the customer with regard to the feasibility study, the energy simulation, or the implementation of the measures. That responsibility lies with the engineer responsible for the analysis.

Customers who would like to participate in one of these programs must complete the appropriate forms included in this Guide and send them to Gaz Métro Energy Efficiency, along with the supporting documentation required.

* A Gaz Métro major industries customer is subject to Rate D₄ or D₅. That customer may also add affiliated accounts that are treated like a major industries customer.

Affiliated accounts are customers subject to Rate D₁ or D₃ whose energy supply management is handled by a customer subject to Rate D₄ or D₅. If in doubt, please communicate with your Sales Representative. For the Gaz Métro programs offered to business clients, consult: <https://www.gazmetro.com/en/business/grants/energy-efficiency-programs/>



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Feasibility studies program – Studies

This program helps defray part of the cost of a feasibility study covering energy efficiency measures.

Accredited firms or participating customers are invited to analyze and study the potential energy savings for all forms of energy. However, the study must focus first on measures using gas technologies. The potential natural gas savings must be as great, if not greater, than the relative portion of the customer's total energy consumption that natural gas represents at the time of the study. The study may cover performance, optimization or modernization measures. The savings for other forms of energy may be studied as well, as long as the cost of the study, agreed to by the customer, includes that provision.

The study orientation must be approved in advance by a Gaz Métro Program Manager.



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Feasibility studies component

FINANCIAL ASSISTANCE

The financial assistance that Gaz Métro offers its major industry customers* is as follows:

Consumption volumes from 75,000 to 425,000 m³

The amount is the lesser of:

- 50% of the cost of the study before taxes, and
- the maximum financial assistance, based on the consumption brackets shown below, up to a maximum of \$5,000.

The maximum financial assistance Gaz Métro will grant is \$5,000 per account number per year.

| Consumption ¹ (m ³ /yr) | Financial incentives (\$) |
|---|---------------------------|
| 75,000 – 100,000 | 1,200 |
| 100,001 – 125,000 | 1,600 |
| 125,001 – 150,000 | 1,800 |
| 150,001 – 175,000 | 2,100 |
| 175,001 – 200,000 | 2,400 |
| 200,001 – 225,000 | 2,700 |
| 225,001 – 250,000 | 3,000 |
| 250,001 – 275,000 | 3,200 |
| 275,001 – 300,000 | 3,500 |
| 300,001 – 325,000 | 3,800 |
| 325,001 – 350,000 | 4,000 |
| 350,001 – 375,000 | 4,300 |
| 375,001 – 400,000 | 4,600 |
| 400,001 – 425,000 | 4,800 |
| 425,001 or more | 5,000 |

¹ A customer's consumption is determined over a 12-month reference period. The 12 consumption months are those selected by the accredited firm in establishing the most realistic or most representative reference base for the study.

* A Gaz Métro major industry customer is covered by Tariffs D₄ or D₅. Affiliated accounts may also be included.

Affiliated accounts are companies covered by Tariffs D₁ or D₃ whose energy supply is managed by a company covered by Tariffs D₄ or D₅, or whose location is the same as that of a company covered by Tariffs D₄ or D₅. Affiliated companies must be part of the same legal entity.



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Consumption volumes above 425,001 m³

For all of the following options, Gaz Métro will grant maximum financial assistance of \$20,000 per account number per year. To receive a new \$20,000 financial assistance envelope, a customer must have participated in the Gaz Métro Implementation incentives component and meet the eligibility criteria

Feasibility studies:

50% of the cost of the study, up to a maximum of \$5,000 before taxes

This option includes the study of energy efficiency measures for natural gas appliances, as well as for energy needs such as water usage for domestic hot water, processes, heating, etc., or for energy distribution systems, etc.

The study submitted must respect the specifications.

Specific studies:

50% of the cost of the study, up to a maximum of \$20,000 before taxes

This option requires a more detailed analysis following a feasibility study. Such specific studies are needed to analyze large-scale projects, mainly for processes. For example, pinch analysis studies² are covered by this option. A copy of the feasibility study showing the need for a specific study must be provided with the application, except for pinch analyses which, because of their methodology, do not require any preliminaries.

The Gaz Métro Program Manager may set a lower percentage for this type of study.

² For a description of the analysis, please consult the Natural Resources Canada Internet site.



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CONTRIBUTION FROM OTHER ORGANIZATIONS

A participant who is covered by another financial assistance program to carry out a feasibility project, agrees to inform Gaz Métro of any amount received or to be received from energy distributors or government organizations for the same project. Gaz Métro will pay the customer the financial assistance granted under this program, net of any contribution from other organizations for the same project, such that the portion payable by the customer represents at least 25% of the costs related to this study.



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Feasibility studies

ADMISSIBILITY CRITERIA

1. The program is intended for Gaz Métro major industrial customers

Eligible activity sectors are the

→ institutional and

→ industrial and commercial sector

2. The study must be done by an accredited firm

All feasibility studies must be carried out by a Gaz Métro [accredited firm](#). Some firms submitted an application in order to participate in the program, and the ones that qualified obtained the status of accredited firm. For more details on the requirements for accreditation by Gaz Métro, consult the document: [Accreditation for firms specializing in energy management](#).

If a company wishes to have the study done by an engineer in its employ, it must complete an accreditation form and respect the requirements in order to be able to carry out the study.

All feasibility studies must be carried out and/or verified by an engineer member of the *Ordre des ingénieurs du Québec*.

3. The request for financial assistance must be submitted before the study is carried out

All requests for financial assistance under the Feasibility studies component must be submitted to Gaz Métro before the analysis work is begun, along with the following documents: **REQUEST FOR ELIGIBILITY (FORM I)**, **REQUEST FOR FINANCIAL ASSISTANCE (FORM IIA)**, and **SERVICE PROPOSAL FROM ACCREDITED FIRM**. The maximum time allowed for carrying out a study is six months from the date of acceptance by Gaz Métro.



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4. The specifications and proposal must be respected

The feasibility study submitted to Gaz Métro must respect the specification items described below, where applicable. The proposal must contain, but not be limited to, the scope of the mandate, the measures to be studied, the personnel who will participate in the study, with details of their fees (hourly rate, tasks, number of hours). Gaz Métro does not necessarily want to impose a standard format standard on all firms or on all customer participants; however, the feasibility studies must meet the minimum conditions. A [Preparation Guide](#) for feasibility studies is provided for this purpose by Gaz Métro. Also, any measure studied but not recommended must also be described on Form III in the same way as the measures recommended in the study.

5. Measures that call for substituting natural gas by another form of energy are prohibited

Given that this program is principally aimed at the efficient and rational use of natural gas, measures for substituting natural gas by another form of energy, whether for strictly economic or short-term reasons, or for any other reason, are not admissible and must not be included in the report. Should they be included, the application will be refused without any possibility of modification. Some substitution measures may be included in the report after agreement with a Program Manager and before the study is carried out. The amount of the assistance will be reduced pro rata to the fees relating to the measure.

6. The facilities or buildings covered by the feasibility study must not have been the subject of a similar study in the preceding five years

In the case where the facilities have been modified since the date of the last study, or the scope of the new study is so different as to make the conclusions of the earlier study obsolete or inapplicable, Gaz Métro may, with supporting evidence, authorize the customer to participate in the program.



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7. Modernization should not be the main focus of the recommendations

Measures aimed at the modernization of natural gas appliances or the building envelope should not be the main focus of the study recommendations. The objective of the study is primarily to identify possibilities other than replacing obsolete technologies by more efficient ones, which are covered by specific Gaz Métro energy efficiency programs.

8. Tariff optimization should not be the main focus of the recommendations
9. A preliminary version of the feasibility study is mandatory in order to obtain a grant

A preliminary report must be submitted to Gaz Métro before the final version is submitted to the customer. A [Preparation Guide](#) has been produced that we strongly recommend you follow. It is available from a Program Manager.

10. The measures studied must comply with laws and regulations

The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).



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Feasibility studies

ITEMS FROM SPECIFICATIONS

1. Description of building (year built, floor area and usage)
2. Description of building's energy systems
3. Details of energy consumption and costs¹
4. Verification of any contractual agreements covering tariff and contract obligations and analysis of impacts on customer

5. Inventory of energy improvements proposed:

The measures recommended should be grouped into four categories:

- load reduction (performance measure);
- optimization (repair, maintenance, retrofitting, simple measures);
- modernization measures² (replacement by more modern energy-efficient appliances);
- building envelope measures (if applicable).

Each measure proposed, whether recommended or not, should include the following details:

- 5.1 Description of each improvement and drawing (drawings optional)

¹ Indicate the total cost of natural gas used to make the calculations of profitability and the prices of other energy sources, as described on page 19 of this Guide.

² Recommendations that concern specific Gaz Métro's energy efficiency programs should be identified in order to avoid double counting.



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5.2 Investment required:

- work (**details of estimates should be provided to a Program Manager, as indicated in the Preparation Guide**);
- engineering and fees;
- grants and tax measures (if offered and applicable).

5.3 Energy savings³

5.4 Calculations of cost-effectiveness, including ROI (payback period), using the calculation method shown on page 19.

5.5 Useful life of improvement and net savings over its useful life

5.6 Environmental impact

- reduction in greenhouse gas emissions: quantity per year.

5.7 Other non-energy benefits (if applicable)

6. Timetable for the implementation of the measures

7. Training and/or awareness raising plan for managers and personnel (if applicable)

8. Recommendations with respect to performance guarantees (if applicable)

9. Appendices (information on technologies, programs, etc.)

³ Provide detailed calculations of savings.



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Implementation incentives program

This program is aimed at measures for rationalizing the consumption of natural gas that are not eligible for any other Gaz Métro energy efficiency program.

FINANCIAL ASSISTANCE

The financial assistance granted under this program is based on the activity sector, as well as on the payback period, calculated by measuring energy efficiency before any grant. This amount is then applied to the volume of natural gas saved for the first year following implementation of the energy efficiency measures. However, the payback period must not be less than one year (three years in the institutional sector) once the amount of the grant has been deducted from the cost of the measures. The Program Manager will send a letter indicating the financial assistance for the whole project. The customer will then have one year from the date of that letter to implement the measures.

| ROI | Less than 1 year | 1 to 2 years | 2 to 3 years | 3 to 5 years | 5 to 7 years | 7 years or + |
|------------------------|------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Industrial/ Commercial | Not eligible | \$0.10/m ³ | \$0.20/m ³ | \$0.25/m ³ | \$0.25/m ³ | \$0.25/m ³ |
| Institutional | Not eligible | Not eligible | Not eligible | \$0.10/m ³ | \$0.20/m ³ | \$0.25/m ³ |

The maximum amount of financial assistance may not be higher than the lesser of \$175,000 or 50% of the total implementation costs (including equipment and installation costs), and any grants from sources other than Gaz Métro.

Requests for less than \$1,000 are not admissible.

Measures for which the payback period is less than one year (3 years in the case of institutions) are not eligible.



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The maximum amount of \$175,000 is paid only once for the first year, but financial assistance may be accorded for other measures in subsequent years. The amount accorded is determined based on the date the request for financial assistance (Step 1) is received; however, the maximum annual amount is recognized based on the date of payment, which respects Gaz Métro's fiscal year. The amount accorded may be revised once the supporting documentation has been received.

Even though the request must cover new measures, Gaz Métro will accept requests for measures already being implemented, provided that the work began after the January 1 preceding the start of Gaz Métro's current fiscal year and that the work had not been completed at the time the request was made.

Gaz Métro's fiscal year starts on October 1 and ends September 30. However, all applications must be submitted by September 15 at the latest, or they will be carried over to the following fiscal year.



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Implementation incentives

ADMISSIBILITY CRITERIA

1. This program is intended for current and about-to-become major industrial customers* of Gaz Métro, as well as for new construction projects by Tariff D₄ and D₅ customers

Eligible activity sectors are the:

→ institutional, and

→ industrial and commercial sector.

Note that for about-to-become customers the financial assistance will be paid once their Gaz Métro account number has been issued.

2. The energy savings measure must relate to the consumption of natural gas

Any energy savings measure that has a direct or indirect impact on the consumption of natural gas may be eligible, provided that its aim is not to substitute natural gas by another source or to eliminate it. Also, the measure must not be similar to a technology covered by a Gaz Métro prescriptive or high efficiency appliance program, regardless of its level of energy efficiency.

3. Measures that concern renewable energies are potentially admissible.

Certain measures, such as geothermal or air energy or heat recovery from a source other than natural gas (excluding processes), may be eligible as an energy savings measure, but only if the energy is to be used for space heating. An agreement with the Program Manager must be concluded before implementation of such a measure in order to determine the savings allowable. In the case of processes, savings from heat recovery from a source other than natural gas are not eligible. All such measures must respect a minimum threshold of natural gas consumption after implementation.

* A Gaz Métro major industrial customer is covered by Tariffs D₄ or D₅. Affiliated accounts may also be included.

Affiliated accounts are companies covered by Tariffs D₁ or D₃ whose energy supply is managed by a company covered by Tariffs D₄ or D₅, or whose location is the same as that of a company covered by Tariffs D₄ or D₅. Affiliated companies must be part of the same legal entity.



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4. The measure must be recommended and justified.

All measures must be recommended and justified either by a technical-economic feasibility study or by a report or other pertinent document signed by an engineer member in good standing of the *Ordre des ingénieurs du Québec*.

Such documents may include:

- any firm accredited by Gaz Métro to carry out technical-economic feasibility studies for an assistance program;
- a report from an engineering consulting firm with its head office in Québec;
- a study carried out by an engineer employed by a manufacturer or distributor of energy efficient equipment;
- a study by an engineer in the employ of the customer.

5. The natural gas savings must be supported by calculations

The detailed calculations must be done or verified by an engineer in good standing of the *Ordre des ingénieurs du Québec*.

The justification for the savings must be based on current and anticipated operating conditions. For new buildings, the hypotheses proposed for estimating the reference consumption of natural gas must be submitted and must reflect current industry practices. The calculations must be made in accordance with recognized engineering methods.

6. A measure covered in the request for financial assistance that is part of a series of measures must be appropriately documented

The costs and savings must be identified separately for each measure in the same project.



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7. Measures covered by other Gaz Métro energy efficiency programs must be distinct from the other energy savings measures.

If a measure is combined with the replacement of an appliance covered by one of Gaz Métro's standard high efficiency appliance programs, then the savings related to that measure must be separated from those stemming from the appliance replacement. The same applies to measures that concern the building envelope, recommissioning, or solar heating.

8. Measures covering boilers can be accepted to the program
Boilers with a capacity above 5 MMBtu/h may be eligible under the Implementation incentives component.
9. Performance measures that do not require any expenditure on equipment or products are not eligible
10. Maintenance measures (replacement as a result of a breakage; repairs) are not admissible
11. The measures implemented must comply with laws and regulations
The measures studied and/or implemented must comply with the regulations and laws applicable in Québec, in particular those dealing with air quality and environmental protection, as well as with the provisions of the Natural Gas and Propane Installation Code (B149.1).
12. A participant who is covered by another financial assistance program to carry out the project, agrees to inform Gaz Métro of any amount received or to be received from energy distributors or government organizations for the same project. Gaz Métro will pay the customer the financial assistance granted under this program, net of any contribution from other organizations for the same project, such that the portion payable by the customer represents at least 25% of the costs related to this project.



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13. Handling of file for customers using the competitive make-up gas service.

Customers who use the competitive make-up gas service are eligible for the program, but the volume allowable must be calculated pro rata based on consumption over the 12 months preceding the request. The financial assistance is paid at the end of the work, on receipt of supporting documentation. However, if the customer and equipment covered by the energy savings measure do not consume more natural gas at the time of the request for payment, the payment will be held back until the natural gas consumption volume is restored. The maximum time allowed before the financial assistance is paid is one year.

14. Calculation of ROI (payback period)

$$\text{ROI} = \frac{\text{Total cost of energy efficiency measures attributed to natural gas (\$)}}{\text{Annual natural gas savings (\$) associated with the measure(s)}}$$

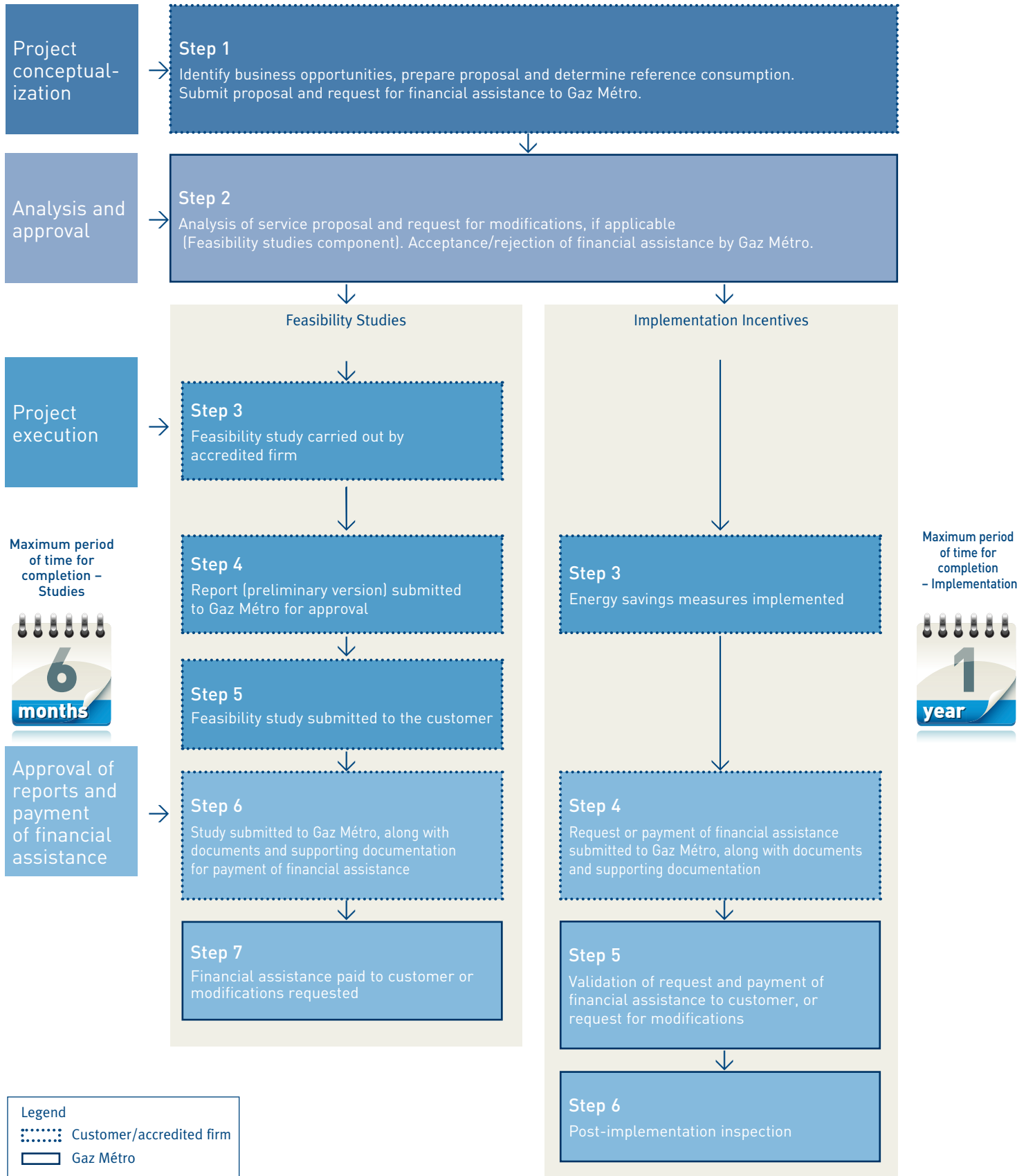
that is

$$\frac{\text{(Costs of materials + installation + removal, etc.)}}{\text{(Annual volume saved in m}^3 \times \text{unit costs of natural gas (distribution + supply + transportation + compression + load balancing + SPEDE (Cap \& Trade System) avoided cost))}^1$$

¹ Unit costs of natural gas are calculated based on the average of the 12 months preceding the month of the request for financial assistance under this program. Customers who provide their own services may use their specific prices on condition that these are documented in supporting documentation and that they are in effect at the time the request is made. When these are not available, the prices published by Gaz Métro will serve as the reference.

For customers not considered high emitters under the Cap & Trade System, the SPEDE avoided cost corresponds to the Tariff rate "SPEDE service." Customers who are considered high emitters may use an estimate of their own SPEDE avoided cost as long as it is documented and justified.

PROGRAM STEPS (TABLE)





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Program steps

FEASIBILITY STUDIES PROGRAM – STUDIES

Step 1: Submission of request for financial assistance to Gaz Métro

The program is intended for Gaz Métro major industrial customers who would like to have feasibility studies done. As a first step, the customer submits a request for financial assistance to a Gaz Métro Program Managers by completing the **APPLICATION FOR ADMISSIBILITY (FORM I)**, the **REQUEST FOR FINANCIAL ASSISTANCE (FORM IIA)**, and the **DETAIL OF INTERNAL RESOURCES (FORM V)**, if applicable.

The application must be accompanied by a complete proposal from the accredited firm, or the participating customer, that includes a brief description of the measures to be analyzed in the feasibility study and an indication of the amount of financial assistance the customer expects to receive.

In submitting the application, the customer declares that he has read the program admissibility criteria.

Step 2: Analysis of proposal and request for modification (if applicable); acceptance

Gaz Métro analyzes the request for financial assistance based on the admissibility criteria and confirms in writing its acceptance (or refusal) of the request for financial assistance, the amount accorded, the deadline for completion, as well as a reminder of the performance conditions and specifications to be respected.

The customer agrees that Gaz Métro may request details from the accredited firm, or its own engineer, regarding the content of the proposal and make modifications, but without changing the cost of carrying out the study.

Step 3: Feasibility study carried out

The accredited firm, or the participating company, has six months from the date Gaz Métro agrees to pay the financial assistance to carry out the feasibility study in accordance with the proposal and specifications.



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Step 4: Submission of report (preliminary version) to Gaz Métro for approval

The accredited firm, or the participating customer, submits a preliminary version of the study to Gaz Métro. The customer agrees that Gaz Métro may ask the accredited firm to make modifications to the study so that it respects the proposal and specifications. In addition, submission of the **SUMMARY OF MEASURES COVERED BY REQUEST FOR FINANCIAL ASSISTANCE (FORM III)**, with the “Customer authorization” and “Validation by engineer” sections duly completed.

Step 5 (accredited firm): Submits feasibility study to customer

The accredited firm submits the final version of the study to the customer.

Step 6: Submission of study to Gaz Métro, along with documents and supporting documentation for payment of the financial assistance

The customer completes the Transmittal Form for submitting the documents and supporting documentation to go with the **REQUEST FOR PAYMENT OF FINANCIAL ASSISTANCE (FORM IVA)**. The customer has one month following receipt of the study from the accredited firm to make the request for payment of the financial assistance.

The Transmittal Form must be accompanied by the following documents:

- a complete copy of the final version of the feasibility report on which the completion date is indicated, as well as the identity of the professional who carried out the study or approved the report;
- a copy of the bill sent to the customer by the accredited firm for the total cost of the study, plus applicable taxes (GST & PST), as well as Form V, if the customer’s internal resources have collaborated on the study. For customer participants, a final version of the form **DETAILS OF INTERNAL RESOURCES (FORM V)** is also required;
- an invoice from the customer to Gaz Métro to claim the financial assistance, plus applicable taxes (GST and PST);



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Step 7: Payment of financial assistance to customer or request for modifications

A Program Manager will analyze the report and if it is considered satisfactory, i.e., if it respects the eligibility criteria and specifications and if all the documents have been received, the Program Manager so advises the customer and issues a cheque. If the scope of the study was modified while underway, or if the study is considered unsatisfactory, then Gaz Métro reserves the right to ask the accredited firm, or the participating customer, to make certain revisions or modifications and to put the payment of the financial assistance on hold until an acceptable version is received. The Program Manager so advises the customer.



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IMPLEMENTATION INCENTIVES PROGRAM

Step 1: Submission of request for financial assistance to Gaz Métro

The program is intended for Gaz Métro major industrial customers and about-to-become customers who would like to implement the energy savings measures proposed in a technical-economic feasibility study or other document recognized by the program. As a first step, the customer submits a request for financial assistance to a Gaz Métro Program Manager by completing the **APPLICATION FOR ADMISSIBILITY (FORM I)** and the **REQUEST FOR FINANCIAL ASSISTANCE (FORM IIB)**.

The application must be accompanied by a complete copy of the feasibility study or other document that describes the measure(s) covered by the request, along with a preliminary version of the **SUMMARY OF MEASURES COVERED BY REQUEST FOR FINANCIAL ASSISTANCE (FORM III)**.

In submitting the application, the customer declares that he has read the program admissibility criteria.

Step 2: Analysis of request for financial assistance and project documents /acceptance

Gaz Métro analyzes the request for financial assistance based on the admissibility criteria and confirms in writing its acceptance (or refusal) of the request for financial assistance, the amount accorded, the deadline for completion, as well as a reminder of the performance conditions.

The customer agrees that Gaz Métro may request details from the firm responsible about the scope of the request for financial assistance and the project documents, or make modifications to them, without, however, changing the implementation costs.

Step 3: Energy savings measures implemented

The customer has one year from the date Gaz Métro agrees to pay the financial assistance to implement the measures approved by Gaz Métro. The customer must advise Gaz Métro if this deadline cannot be respected. Beyond that deadline, Gaz Métro reserves the right to refuse payment of the financial assistance for implementation of the measures.



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The measure, as approved by Gaz Métro, must be implemented in its entirety. However, if the measure is implemented differently or modified, the participant must complete the appropriate form, as described below.

Step 4: [Submission of request for payment of the financial assistance to Gaz Métro, along with documents and supporting documentation](#)

The customer completes the **REQUEST FOR PAYMENT OF FINANCIAL ASSISTANCE & IMPLEMENTATION CERTIFICATION (FORM IVC)**. This request must be presented within a year following the date indicated on the letter agreeing to the original request.

The request must be accompanied by the following documents:

- certification of implementation — full implementation
 - duly signed; or certification of implementation
 - implementation modified — duly signed;
- documentation supporting the acquisition and installation of equipments and/or and services rendered, including:
 - a copy of invoice sent to the customer by the supplier of the goods provided or services rendered;
 - the final version of **SUMMARY OF MEASURES COVERED BY REQUEST FOR FINANCIAL ASSISTANCE (FORM III)** reflecting the actual costs of acquiring and installing the equipments, or of the services rendered;
 - an invoice from the customer to Gaz Métro claiming the financial assistance, plus applicable taxes (GST and PST).

Step 5: [Validation of request and payment of financial assistance to customer or request for modification](#)

A Program Manager analyzes the measures implemented and if the file is considered satisfactory, i.e. it respects the performance conditions, the Program Manager so advises the customer and issues a cheque.

If the scope of the measures has been modified during implementation, then Gaz Métro reserves the right to ask the customer



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to make certain modifications and to put the payment of the financial assistance on hold until the modifications have been implemented.

Step 6: Post-implementation inspection

An inspection visit in the 12 months following implementation of the measures is mandatory in cases where the financial assistance received is \$40,000 or more (before taxes). Inspection visits are chosen at random when the amount is lower, and Gaz Métro will select which work to inspect. Gaz Métro will contact the resource person identified on **FORM I** to set a date for the inspection. During the inspection visit, the customer participating in the Implementation Incentives Program must be able to show the Gaz Métro representative conducting the inspection evidence that the measures for which Gaz Métro has paid financial assistance have indeed been implemented.

If that inspection reveals that some measures previously declared have not been implemented, the customer agrees to immediately repay the financial assistance Gaz Métro granted under this program.

Appendix — TREATMENT OF APPLICABLE TAXES

ENERGY EFFICIENCY: FEASIBILITY STUDIES AND IMPLEMENTATION INCENTIVES PROGRAMS

As an enterprise registered for GST and PST and as a beneficiary of financial assistance offered under the programs shown above, we wish to inform you that in order to comply with the *Excise Tax Act* (GST) and the *Act respecting the Québec sales tax* (PST), an invoice addressed to Gaz Métro must be submitted claiming the total amount of the financial assistance accorded.



IN ORDER FOR GAZ MÉTRO TO MAKE THE PAYMENT, THE INVOICE MUST BE PRESENTED IN DUE FORM AND CONTAIN THE FOLLOWING INFORMATION:

- name of beneficiary of financial assistance (the customer);
- address where work was carried out;
- address of Gaz Métro;
- number and date of invoice;
- description: Financial assistance related to the Energy Efficiency: Feasibility Studies and Implementation Incentives Programs;
- amount of financial assistance claimed and indicated in letter of acceptance from Gaz Métro;
- taxes payable on amount of financial assistance: GST and PST;
- beneficiary's GST and PST account numbers;
- indicate file number shown on acceptance letter.

The invoice must be sent to the following address with the **REQUEST FOR PAYMENT OF FINANCIAL ASSISTANCE (FORM IVA, IVC)** following completion of the work.

To submit a request, or for any administrative information regarding an application:

By e-mail:

By mail:

Energy Efficiency
Gaz Métro
1717 du Havre
Montréal QC H2K 2X3

By fax: 514 598-3700

Secretariat: 514 598-3410

Your accounting and tax specialists will be able to give you more details concerning this specific procedure and the tax treatment of the financial assistance. Please do not hesitate to consult them.



If you use Version 11 of Acrobat Reader (or Professional) you can complete, send (by e-mail), print, and save the various forms. When you have completed the forms, hit the Send button and you will be directed to an e-mail. You can then write a message and also enclose your other documents before you send the e-mail to Gaz Métro.

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FEASIBILITY STUDIES PROGRAM – STUDIES

Before the work is executed – New application for admissibility

- Application for admissibility (form I)
- Request for financial assistance (form IIa)
- attach the Service proposal

Following completion of the work – Request for payment

- Summary of measures covered by request for financial assistance (form III)
- Request for payment of financial assistance (form IVa)

For participating customers only

- Detail of internal resources (form V)

IMPLEMENTATION INCENTIVES PROGRAM

Before the work is executed – New application for admissibility

- Application for admissibility (form I)
- Request for financial assistance (form IIb)
- Summary of measures covered by request for financial assistance - preliminary version (form III)
- Attach the study and/or the calculation files

Following completion of the work – Request for payment

- Summary of measures covered by request for financial assistance - final version (form III)
- Request for payment of financial assistance & implementation certification (form IVc)

BUSINESS

Guide de rédaction

- Preparation Guide – Studies component and Implementation component