

ONTOLY

Building Emissions Reduction Standard Program

Fee Schedule

Existing Building Methodology – Energy Efficiency and Fuel Switching

ONTOLY_RETROFIT_EEFS-1.0

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1. Overview

This Fee Schedule sets out the fees payable to Ontoly for services rendered under the Building Emissions Reduction Standard (BERS) Program in connection with the Existing Building Methodology (ONTOLY_RETROFIT_EEFS-1.0). All fees are expressed as fixed amounts in the local currency of the jurisdiction in which the Project is located: United States Dollars (USD) for Projects in the United States and Canadian Dollars (CAD) for Projects in Canada. The fee amounts stated in this Fee Schedule apply at par in each currency (e.g., a stated fee of \$1,500 is payable as USD \$1,500 for U.S. Projects and CAD \$1,500 for Canadian Projects). No exchange-rate conversion applies.

Ontoly charges fees on a per-building basis, structured as three components. All fees are payable in full at the time of requesting the Preliminary Assessment Report, prior to the commencement of any services:

- Project Listing Fee – a one-time fee to post a project to the Ontoly Buyers Portal at Listed status.
- Preliminary Assessment Report Fee – a one-time fee for the preparation and delivery of a Preliminary Ex-Ante BERU Assessment Report prior to formal project registration.
- 10-Year Certification Fee – a single upfront fee covering the full certification lifecycle for the building, including project registration, annual GHG quantification, monitoring support, third-party verification, BERU issuance, and registry maintenance for the maximum crediting period of ten (10) years.

Fees are scaled by Retrofit Project Size, defined as the total estimated Capital Expenditure (CAPEX) of the retrofit project as reported by the Building Representative in the Financial Additionality Data Submission Form (BERS Standard Sections 10.3.1–10.3.9).

2. Project Listing Fee

A flat fee of \$200 per building applies to post a project to the Ontoly Buyers Portal at Listed status. All fees are expressed in the local currency of the jurisdiction in which the Project is located: USD for Projects in the United States and CAD for Projects in Canada.

Listed status enables a project to be posted to the Buyers Portal based on responses to basic eligibility questions, prior to submission of formal project documentation. This provides early visibility to prospective buyers while the project prepares for full registration.

Listed projects appear on the Non-Validated tab of the Ontoly Buyers Portal, viewable only by registered Buyer Accounts in good standing. Listed projects do not appear on the Ontoly public registry.

The Project Listing Fee covers Ontoly Portal software administration and account support. Listed status confers no certification, validation, eligibility determination, or assurance of any kind from Ontoly under the BERS Program.

Retrofit Project Size (Total CAPEX)	Preliminary Assessment Report Fee	10-Year Certification Fee	Total Fee Per Building
< \$500,000	\$950	\$3,500	\$200

Notes:

- The Project Listing Fee is non-refundable.

3. Fee Schedule by Retrofit Project Size

The following table sets out the per-building fees applicable to each Retrofit Project Size tier. All fees are payable in full at the time of requesting the Preliminary Assessment Report and are non-refundable.

Retrofit Project Size (Total CAPEX)	Preliminary Assessment Report Fee	10-Year Certification Fee	Listing Fee	Total Fee Per Building	Fee Tier
< \$500,000	\$950	\$3,500	\$200	\$4,650	Tier 1
\$500,000 – \$1,000,000	\$1,250	\$4,500	\$200	\$5,950	Tier 2
\$1,000,001 – \$3,000,000	\$1,500	\$5,500	\$200	\$7,200	Tier 3
\$3,000,001 – \$10,000,000	\$2,250	\$8,000	\$200	\$10,450	Tier 4
> \$10,000,000	\$3,500	\$12,500	\$200	\$16,200	Tier 5

Notes:

- All fees in this schedule are expressed at par in local currency: USD for U.S. Projects, CAD for Canadian Projects. The same stated dollar amount applies in each currency; no exchange-rate conversion is required. All fees are exclusive of applicable taxes (including GST/HST, provincial sales tax, and any other applicable levies).
- CAPEX is defined as the total estimated capital cost of the retrofit project, inclusive of equipment, materials, and installation labour, as submitted in the Financial Additionality Data Submission Form.
- Where a single building undergoes multiple retrofit phases, the CAPEX for fee tier determination is the cumulative CAPEX across all phases registered under a single project.
- All fees paid to Ontoly are non-refundable, including in the event of failed verification, adverse verification opinion, project suspension, BERU cancellation, account closure, or termination of the Agreement. Payment of fees does not guarantee any outcome including BERU issuance (Ontoly Platform Terms and Conditions, Section 12.6).

4. Preliminary Assessment Report

4.1 Purpose

The Preliminary Assessment Report is a comprehensive evaluation that determines a building’s carbon credit eligibility and estimated BERU (Building Emissions Reduction Unit) potential under Ontoly’s

Building Emissions Reduction Standard. This report provides the quantification, assurance documentation, and market preparation needed to enter pre-purchase agreements with enterprise carbon credit buyers.

The Preliminary Assessment Report is prepared by Ontoly using submitted utility data, building attributes, and the Ontoly GHG Quantification Model. It is designed to enable informed decision-making by providing a credible, data-driven estimate of the building’s expected emission reductions, financial additionality, and regulatory surplus position – all key determinants of BERU eligibility and volume. Future certification and issuance fees apply only when credits are issued based on actual verified building performance data.

4.2 Deliverables

The Preliminary Assessment Report includes the following deliverables:

Deliverable	Description
Project Registration & Onboarding	Review of Eligible Validation Documentation, project boundary confirmation, baseline data intake, and creation of the Project Description Report on the Ontoly Registry.
Preliminary BERU Estimate	Estimated annual and total (10-year) BERU issuance volume based on submitted utility data, building attributes, and the Ontoly GHG Quantification Model.
Indicative Financial Additionality	Preliminary NPV Financial Additionality Test result (Pass/Fail) and indicative Investment Analysis Rating (1–5 scale) based on submitted financial data.
Regulatory Surplus Overview	Summary of applicable building performance standards and regulatory requirements in the building’s jurisdiction, with a preliminary assessment of regulatory surplus.
Crediting Period Estimate	Estimated crediting period duration (up to 10 years), subject to the regulatory surplus assessment at the time of formal project registration.
Eligibility Confirmation	Confirmation of whether the building and retrofit project meet the threshold eligibility criteria under the BERS Standard and this Methodology.
Indicative Revenue Projection	Non-binding estimate of potential BERU revenue over the crediting period, based on prevailing or projected carbon credit pricing.

4.3 Data Requirements

To prepare the Preliminary Assessment Report, the Building Representative shall submit the following information via the Ontoly Portal:

- A minimum of twelve (12) months of historical, metered pre-retrofit utility data (electricity and fossil fuel consumption).
- Building attributes including gross floor area (m²), building type/category, year of construction, and geographic location.
- Estimated retrofit CAPEX, anticipated annual energy savings by fuel type, and expected incentive or rebate amounts.

- Description of the proposed retrofit measures and incumbent equipment to be replaced.

4.4 Limitations

The Preliminary Assessment Report is indicative and non-binding. It does not constitute a guarantee of BERU issuance, nor does it represent a formal project registration or validation determination. Final BERU volumes are determined solely through the annual ex-post verification process following project registration. Ontoly reserves the right to adjust or revise preliminary estimates upon receipt of additional data or upon formal project review.

5. 10-Year Certification Fee

5.1 Scope of Coverage

The 10-Year Certification Fee is a single, upfront payment that covers the entire certification lifecycle for the building under the BERS Program, from project registration through the final year of the crediting period (up to ten years). This fee structure provides cost certainty to building owners and eliminates recurring annual service fees.

The Certification Fee covers the following services:

Service Component	Description
Project Monitoring Data Review & Reconciliation	Review of Monitoring Data, including actual annual data intake submissions.
Annual GHG Quantification	Ontoly’s annual calculation of emission reductions using the Ontoly GHG Quantification Model, including weather and occupancy normalization procedures aligned with ASHRAE 100-2024 and LEED v5.
Annual Monitoring Support	Processing and QA/QC of Annual Monitoring Reports submitted by the Building Representative, including automated completeness checks and anomaly flagging.
Third-Party Verification	Ontoly’s engagement and management of the independent, accredited Verification Body for annual ex-post verification of utility data and Ontoly-managed datasets.
BERU Issuance	Issuance of Building Emissions Reduction Units (BERUs) on the Ontoly Registry following successful verification for each monitoring year. Issuance Reports will be provided annually via Ontoly Portal.
Registry Maintenance	Maintenance of the building’s project record on the Ontoly Registry for the full crediting period, including public Project Description Reports and issuance records.
Ongoing Regulatory Monitoring	Continuous monitoring of regulatory developments in the building’s jurisdiction via the Ontoly Jurisdictional Regulatory Model.

5.2 What Is Not Included

The 10-Year Certification Fee does not include:

- Preparation of engineering validation documentation (e.g., IPMVP Reports, IREE certification reports). These are the responsibility of the Building Representative and must be prepared by a licensed Professional Engineer.
- Legal, tax, or investment advisory services related to carbon credit transactions or BERU monetization.
- Costs associated with physical retrofit installation, building equipment, or construction.
- Fees for re-registration if a project is terminated and subsequently re-submitted as a new project.

5.3 Early Termination

If a building's participation in the BERS Program is terminated before the end of the 10-year crediting period – whether due to building demolition, permanent vacancy, failure to submit Annual Monitoring Reports, or voluntary withdrawal by the Building Representative – no refund of the Certification Fee shall be issued. The Certification Fee is structured as a fixed, non-refundable payment to reflect the upfront costs of project onboarding, verification infrastructure, and long-term registry commitments.

5.4 Additional Retrofit Projects Within an Active Crediting Period

Where a building that is already enrolled in the BERS Program undertakes a subsequent retrofit project during the same crediting period, the Building Representative may submit the new project for incorporation into the existing certification. Because the building's baseline, project boundary, and monitoring infrastructure are already established, Ontoly does not require full re-registration. Instead, a Certification Revision Fee applies to cover the recalculation of the GHG quantification baseline, updated BERU projections, revised verification scope, and any amendments to the Project Description Report on the Ontoly Registry.

Certification Revision Fee

The Certification Revision Fee is 30% of the original total fee paid for the building (PAR Fee + Certification Fee), based on the Fee Tier that applied at the time of initial registration. This fee is payable in full at the time of submission of the additional retrofit project and is non-refundable.

Scope of the Certification Revision

The Certification Revision Fee covers the following:

- Recalculation of the GHG quantification baseline to incorporate the additional retrofit measures.
- Updated Preliminary BERU Estimate reflecting the combined emission reductions from the original and additional retrofit projects.
- Revised verification scope and updated engagement with the independent Verification Body.
- Amendment to the Project Description Report on the Ontoly Registry to reflect the expanded project scope.
- Revised Financial Additionality assessment for the additional retrofit measures.

The crediting period is not extended or restarted. All additional BERUs generated from the subsequent retrofit are issued within the remaining years of the original crediting period. The additional retrofit measures must independently meet the eligibility criteria in Section 2.3 of the Existing Building Methodology.

Example

A building owner registered a Tier 3 project (\$1,000,001–\$3,000,000 CAPEX) and paid the full fee of \$7,000 (\$1,500 PAR + \$5,500 Certification). Three years into the crediting period, the owner undertakes a second retrofit on the same building. The Certification Revision Fee is $30\% \times \$7,000 = \$2,100$. This covers the baseline recalculation, updated BERU projections, and revised verification scope for the remaining seven years of the crediting period. No new PAR or Certification Fee is required.

6. Aggregated Building Projects

6.1 Overview

An Aggregated Building Project is a BERS project that covers multiple buildings or connected structures registered under a single project submission, subject to the conditions in BERS Standard Section 4.5.2. Rather than per-building fees with portfolio discounts, Aggregated Building Projects are priced as a single flat fee based on the total Gross Floor Area (GFA) of all buildings in the submission. This eliminates ambiguity around building boundaries (e.g., connected structures, shared mechanical systems, bridge-linked buildings) and provides a clear, predictable cost.

6.2 Aggregated Project Fee Schedule

The following flat fees apply to Aggregated Building Projects (“Aggregation”) based on total portfolio GFA. Fees are shown separately for the Preliminary Assessment Report (PAR) and the 10-Year Certification. All fees are payable in full at the time of requesting the Preliminary Assessment Report and are non-refundable.

*Note, the BERS Standard and Approved BERS Methodologies outline conditions for aggregation, including caps on the maximum number of buildings that can be aggregated.

Combined Total Portfolio GFA	PAR Fee per Aggregation	Certification Fee per Aggregation (max n= 5 buildings)	Aggregation Tier
< 50,000 sqft	\$1,000	\$3,500	Tier A
50,001 – 150,000 sqft	\$2,000	\$6,500	Tier B
150,001 – 400,000 sqft	\$3,500	\$11,500	Tier C
400,001 – 750,000 sqft	\$5,000	\$17,000	Tier D
> 750,000 sqft	\$7,000	\$23,000	Tier E

Notes:

- GFA is the total Gross Floor Area of all buildings included in the Aggregated Building Project, measured in accordance with ANSI/BOMA Z65.1 or equivalent local standard.
- Fees are expressed at par in local currency (USD for U.S. Projects, CAD for Canadian Projects) with no exchange-rate conversion.
- Connected structures, bridge-linked buildings, and buildings sharing mechanical or utility systems may be registered as a single Aggregated Building Project regardless of how individual structures are classified by the local authority.
- All fees paid to Ontoly are non-refundable, including in the event of failed verification, adverse verification opinion, project suspension, or account closure (Ontoly Platform Terms and Conditions, Section 12.6).

6.3 Eligibility

Aggregated Building Projects are subject to the eligibility restrictions in BERS Standard Section 4.5.2. All buildings must share common ownership, a shared property boundary, or aggregated utility reporting. All buildings must be registered under a single submission within a single calendar quarter, share a common Building Representative, and independently meet the eligibility criteria in Section 2.3 of the Existing

Building Methodology. No individual building within the aggregation may exceed the applicable energy savings threshold of 60 GWh per year (Existing Building Methodology, Section 2.1.5).

6.4 Example

A property management company registers a campus of three office buildings (45,000 sqft, 60,000 sqft, and 55,000 sqft) as an Aggregated Building Project. Total portfolio GFA is 160,000 sqft, placing the project in Tier C. The PAR fee is \$3,500 and the Certification fee is \$11,500, for a total of \$15,000. If the buildings were registered individually under Section 2 (e.g., each at Tier 2), total per-building fees would be $3 \times (\$1,250 + \$4,500) = \$17,250$ — so the aggregated pricing saves \$2,250.

7. Non-Profit and Affordable Housing Discount

Ontoly is committed to supporting mission-driven building owners in accessing the carbon credit market. A 20% discount on all fees set out in this Fee Schedule is available to qualifying non-profit organizations and affordable housing providers.

7.1 Eligibility

To qualify for the non-profit discount, the Building Representative must demonstrate that the building is owned or operated by one of the following:

- A registered non-profit or charitable organization (as defined under the Canada Not-for-profit Corporations Act, the applicable provincial societies act, or Section 501(c)(3) of the U.S. Internal Revenue Code).
- A public housing authority, social housing provider, or affordable housing developer whose primary mandate is the provision of below-market-rate housing.
- A municipal, provincial/state, or federal government entity operating the building for a public or community purpose.

7.2 Application of Discount

The 20% discount applies to both the Preliminary Assessment Report Fee and the 10-Year Certification Fee. For Aggregated Building Projects under Section 5, it is applied to the flat portfolio fees for each component. Proof of non-profit or affordable housing status must be submitted at the time of project registration and is subject to verification by Ontoly.

7.3 Example

A non-profit affordable housing provider registers a single building with retrofit CAPEX of \$1,200,000 (Tier 3). The standard total fee is \$7,000. With the 20% non-profit discount, the total fee is \$5,600. For an Aggregated Building Project at Tier C (\$3,500 PAR + \$11,500 Cert = \$15,000), the non-profit fee would be \$12,000.

8. Taxes and Levies

All fees set out in this Fee Schedule are exclusive of applicable taxes, including goods and services tax (GST), harmonized sales tax (HST), provincial sales tax (PST), value added tax (VAT), and any other taxes, duties, or levies imposed by any governmental authority. The Account Holder is responsible for all such taxes and levies in addition to the fees stated herein, in accordance with the Ontoly Platform Terms and Conditions (Section 3.1(a)).

9. General Terms

9.1 Payment Terms

All fees — including both the Preliminary Assessment Report Fee and the 10-Year Certification Fee — are due and payable at the time of requesting the Preliminary Assessment Report, prior to the commencement of any services, in accordance with the Ontoly Platform Terms and Conditions (Section 12.2). Ontoly will not commence preparation of the Preliminary Assessment Report or proceed with project registration until payment is received in full. Ontoly may accelerate payments that would otherwise be payable over multiple years at the time of account opening, particularly for pilot projects (Section 12.4).

Overdue payments shall accrue interest at a rate of 1% per month (12% per annum), or the maximum rate permitted by applicable law, whichever is less (Section 12.5).

9.2 Fee Adjustments

Ontoly reserves the right to revise this Fee Schedule from time to time. Any fee adjustment shall apply only to new project registrations submitted after the effective date of the revised Fee Schedule. Projects registered under a prior Fee Schedule shall remain subject to the fees in effect at the time of their registration.

9.3 Currency

Fees are expressed at par in the local currency of the jurisdiction in which the Project is located: United States Dollars (USD) for Projects in the United States and Canadian Dollars (CAD) for Projects in Canada. The stated dollar amounts in this Fee Schedule apply identically in each currency; no exchange-rate conversion is applied. For all other jurisdictions, the applicable currency shall be as specified by Ontoly. In the event of a dispute regarding currency, the applicable amount shall be determined in United States Dollars (USD) (Ontoly Platform Terms and Conditions, Section 12.1).

9.4 Disputes

Any disputes regarding fees or invoicing shall be governed by and construed in accordance with the laws of the Province of British Columbia and the laws of Canada applicable therein. The parties hereby attorn to the exclusive jurisdiction of the courts of the Province of British Columbia (Ontoly Platform Terms and Conditions, Section 18.10).

9.5 Contact

For fee inquiries or to discuss Aggregated Building Project pricing, please contact:

Ontoly Program Administration

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