SCALE 2030:
Scaling Clean Buildings in Washington

Agenda

- Introductions
- Why SCALE 2030
- A systemic framework
- Next steps
- Discussion

Clean Energy Transition Institute (CETI)

- **What We Are:** Independent, nonpartisan Northwest research and analysis nonprofit organization
- **Our Mission:** Accelerate an equitable clean energy transition in the Northwest
- **Our Role**:
  - Provide unbiased research and analytics
  - Offer an information clearinghouse for policymakers
  - Convene diverse stakeholders

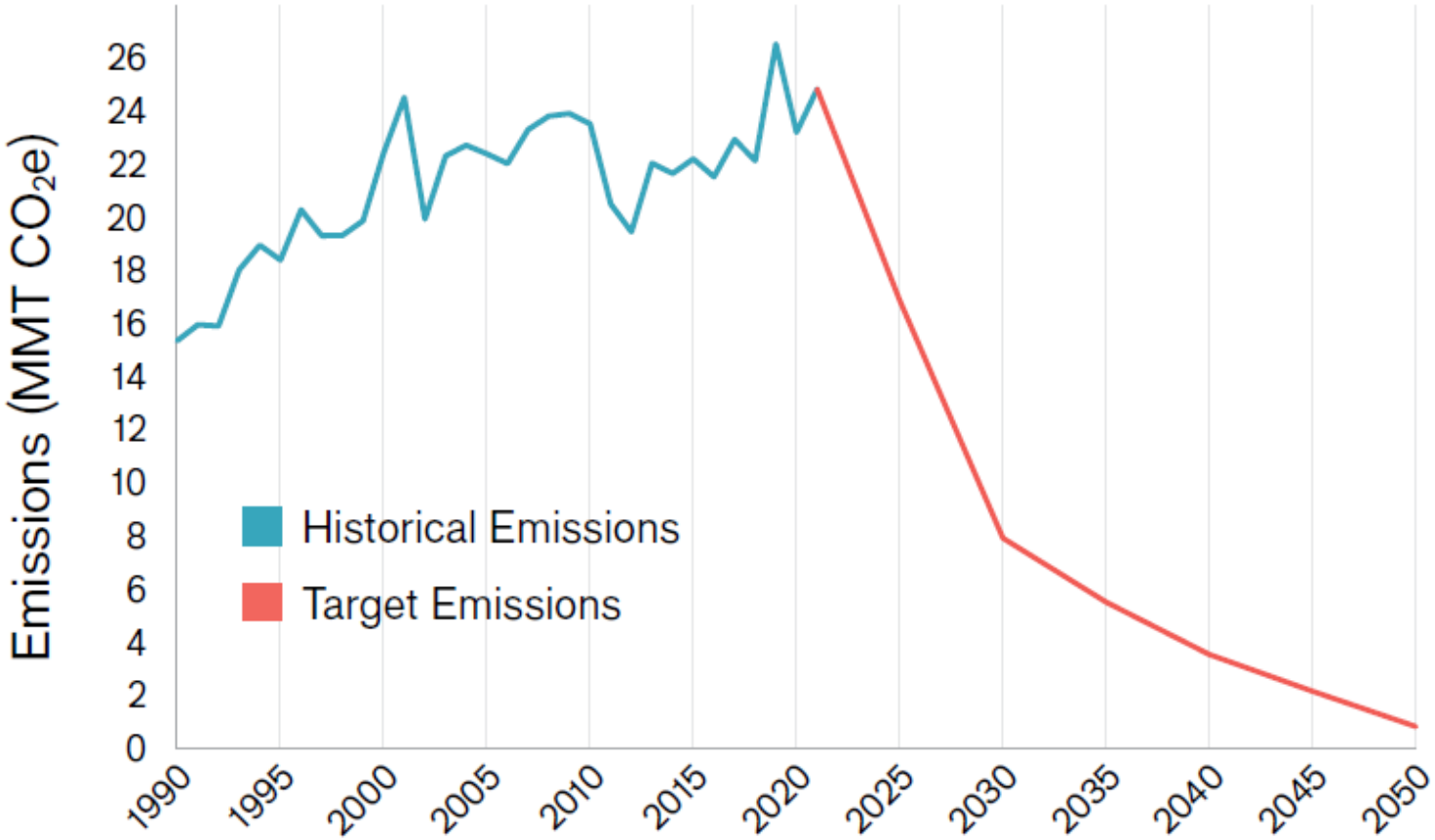
2050 Institute

- **What We Are:** Clean buildings research and policy consulting
- **Our Vision:** Clean buildings sector by 2050
- **Our Role**:
  - Provide research and analysis
  - Develop strategies, frameworks, policies, and programs
  - Partner with utilities, policymakers, and market actors to deliver building decarbonization at scale in the Northwest and beyond

Why SCALE 2030?

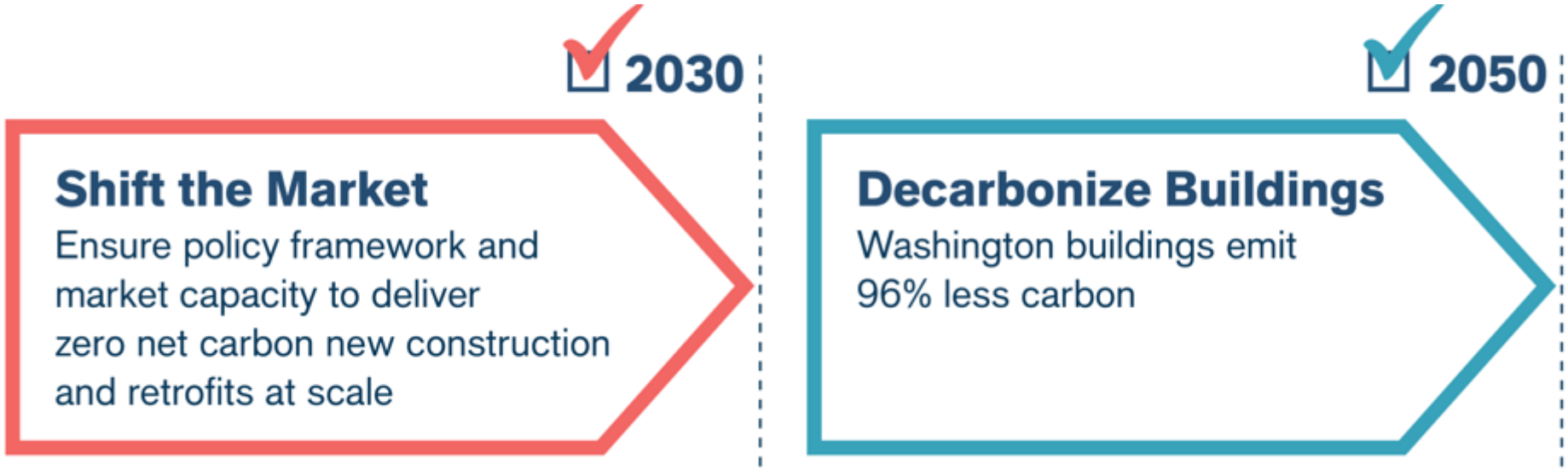
Building Emissions Must Rapidly Decline

Washington State Residential and Commercial Buildings Emissions Over Time



2030 is Pivotal

- To reach 2050 emissions goals at the lowest cost, all equipment replacements in buildings must be zero-emissions **by 2030**



We Need a Systemic Approach

- Shift from incremental energy efficiency and emissions reductions to a systemic framework that will enable the rapid market transformation needed to decarbonize buildings

Simplicity
Cost reductions
Alignment
Leverage
Equity

SCALE 2030 Initiatives

Completed:

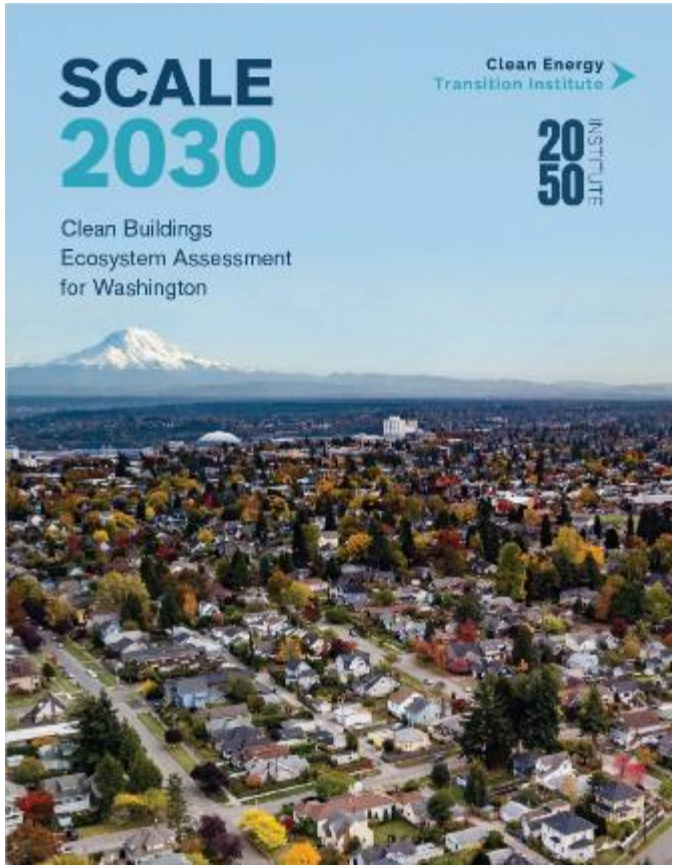
- Clean Buildings Ecosystem Assessment for Washington
- Clean Buildings Transition Framework for Washington

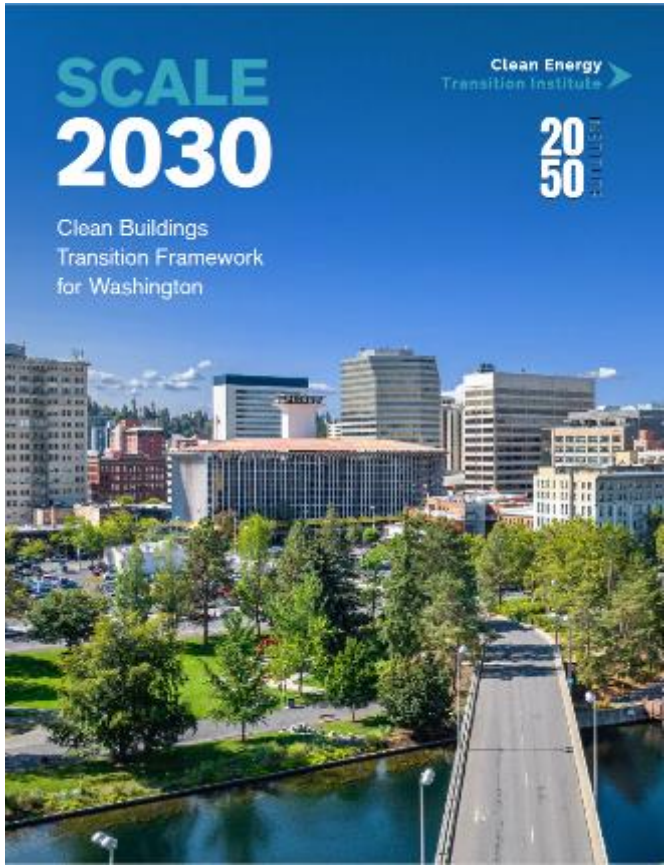
Up next:

- Clean Buildings Transition Roadmap
- Clean Buildings Scorecard
- Clean Buildings Cost Reduction Initiative and Blueprint

SCALE 2030 Materials

- Two SCALE 2030 reports are available on CETI's website





Systemic Barriers to Scaling Clean Buildings in Washington

- No sector level targets or tracking
- Lack of emissions data
- Policy gaps
- Siloed utility programs
- Limited incentives
- High incremental costs
- Market transformation gaps
- No standardized performance labeling
- No large-scale funding sources
- Lack of coordinated planning

Pathways for All Building Sector Segments

Tier 1 (Current)

- Commercial (>50k sq.ft.)

Tier 2 (Current)

- Commercial (20k-50k sq.ft)
- Multifamily (>20k sq.ft.)

Tier 3 (Missing)

- Commercial (≤20k sq.ft.)
- Residential (≤20k sq.ft.)

Policy Gap Analysis

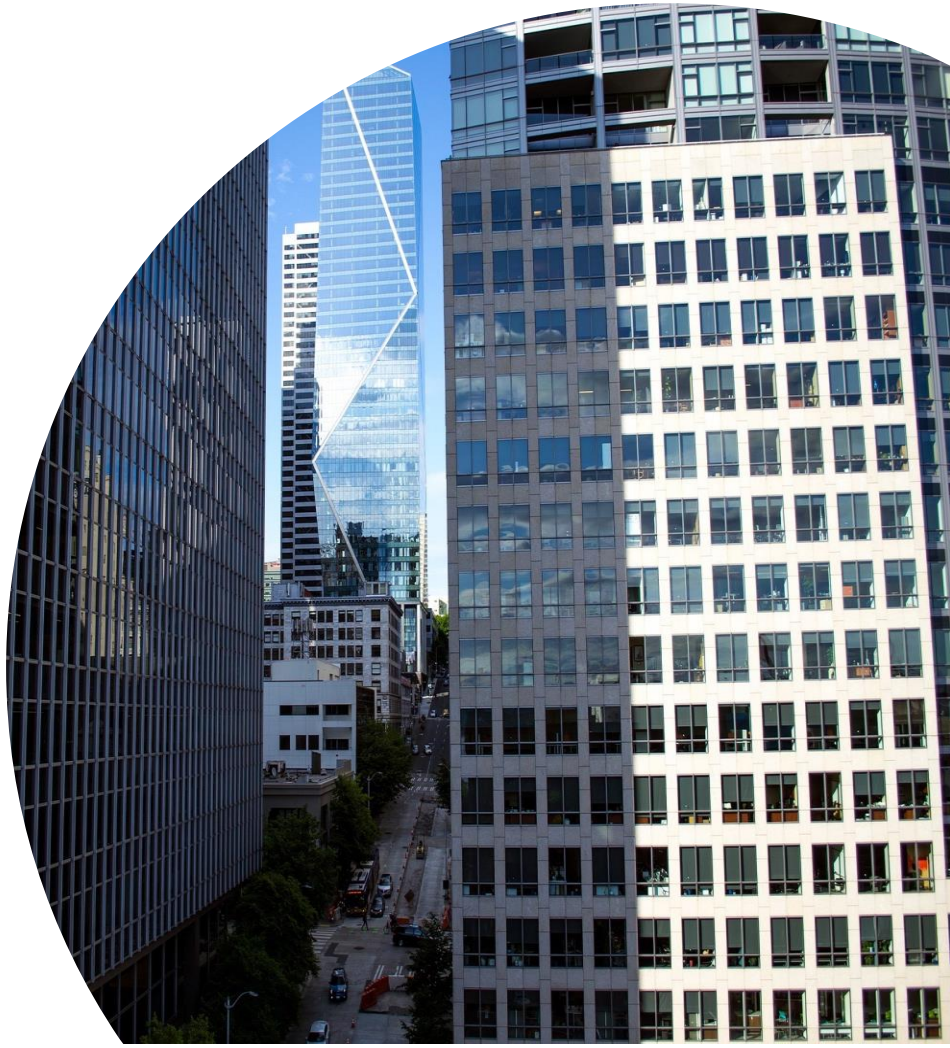
- No building segments have a complete regulatory pathway to net-zero by 2050
- Gaps indicate need for additional strategies to achieve rapid, large-scale change

	Building Sector Tiers & Segments				
Critical Policy Levers	Tier 1: Commercial (>50k sq.ft.)	Tier 2: Commercial (>20k ≤50k sq.ft)	Tier 2: Multifamily (>20k sq.ft.)	Tier 3 (Future): Commercial (≤20k sq.ft.)	Tier 3 (Future): Residential (≤20k sq.ft.)
State Clean Buildings Transition Target (New Construction)	–	–	–	–	–
State Clean Buildings Transition Target (Existing Buildings)	–	–	–	–	–
Transition Rate and Milestones	–	–	–	–	–
Annual Building Sector GHG Inventory and Progress Reporting	–	–	–	–	–
Zero-Emission Appliance Standard	–	–	–	–	–
Energy Code	■	■	■	■	■
Performance Benchmarking (for real estate transactions)	■	■	■	–	–
Performance Benchmarking (publicly disclosed)	–	–	–	–	–
Standardized Mandatory Performance Labeling	–	–	–	–	–
CBPS Targets by Building Type, *2025 BPS Cycle*	■	–	–	–	–
CBPS Targets by Building Type, *2030 BPS Cycle*	–	–	–	–	–
CBPS Targets by Building Type, *2035 BPS Cycle*	–	–	–	–	–
CBPS Targets by Building Type, *2040 BPS Cycle*	–	–	–	–	–
CBPS Targets by Building Type, *2045 BPS Cycle*	–	–	–	–	–

– No current policy ■ Policy in place

Opportunities to Spur Systemic Change

- Recognize buildings as essential infrastructure and central to the clean energy transition
  - Value buildings as a resource to communities and to the grid and invest accordingly
- Reduce over reliance on programs and incentives
- Fortify policy mandates and market transformation to create a transition path for all buildings
- Ensure low-cost solution sets for priority building segments
- Establish bold new funding sources to transition at scale



What does a framework to scale clean buildings look like?

Five Strategies for Clean Buildings

Performance as a Resource (PAR) Ecosystem
Scale up market demand

Rapid Market Transformation (Rapid MT)
Scale up market supply

Strategic Transition Funding
Scale up funding

Coordinated Planning
Scale up planning

Clean Energy Regions
Scale up implementation

Performance as a Resource Ecosystem

- Scale up market demand
  - Performance targets and tracking
  - Low-cost solutions for priority segments
  - Performance-based policies/programs
  - Interconnectivity and interoperability

Rapid Market Transformation

- Scale up market supply
  - Targeted compliance support for PAR policies and programs
  - Supply chain resilience at scale
  - Targeted and expanded cost reductions
  - Expanded and increased incentives and subsidies
  - Support for technical analysis, policy development, and compliance tools
  - Assess and promote new business models
  - Economic development and job growth

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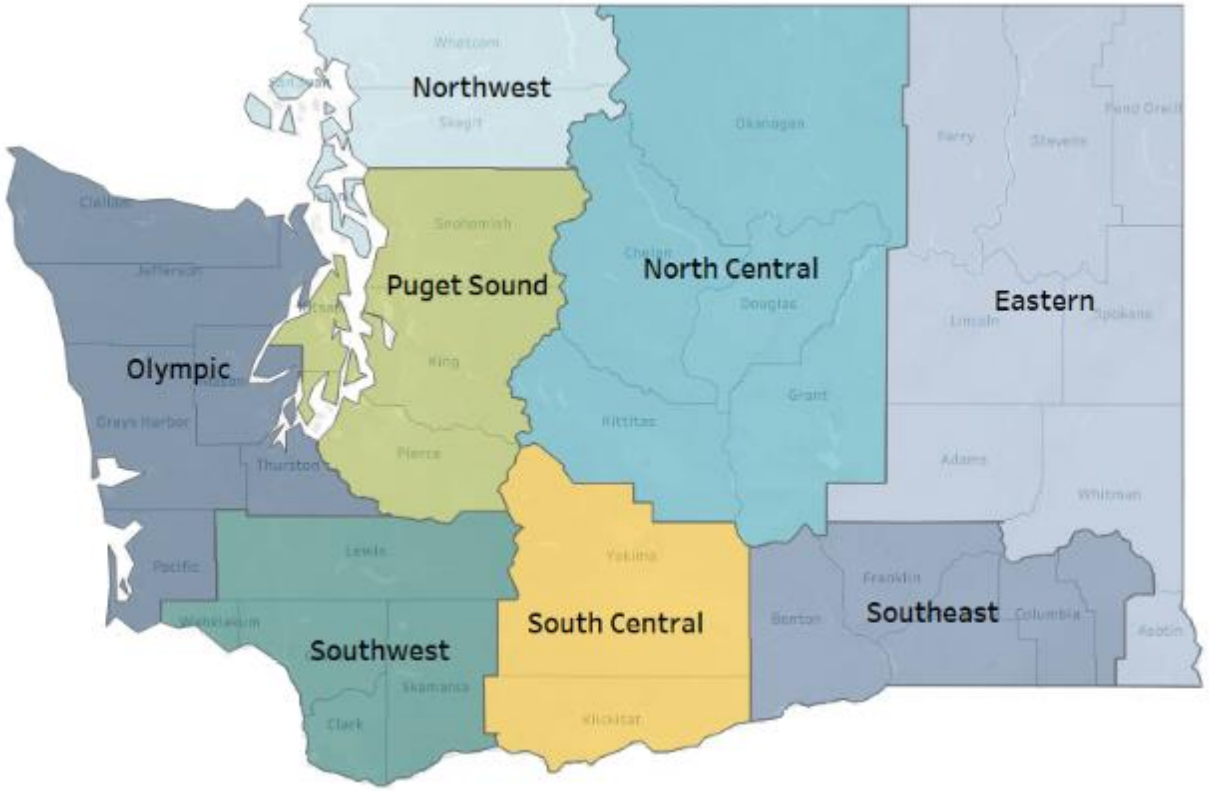


Up next

- A SCALE 2030 transition roadmap with priority action items and roles
  - Working group in the fall
- Identifying implementation action items and initiatives for SCALE 2030 team to lead, for example:
  - Scorecard
  - Cost reduction initiative

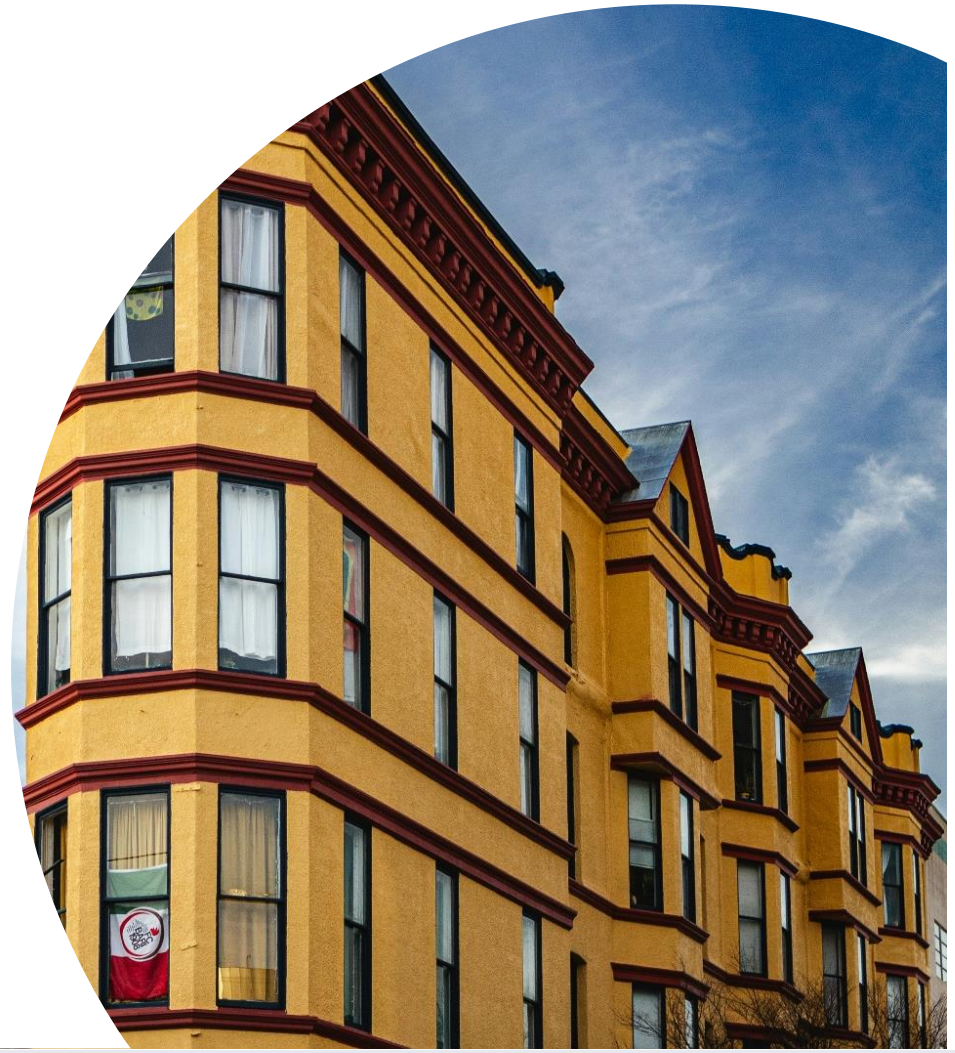
Calls to action

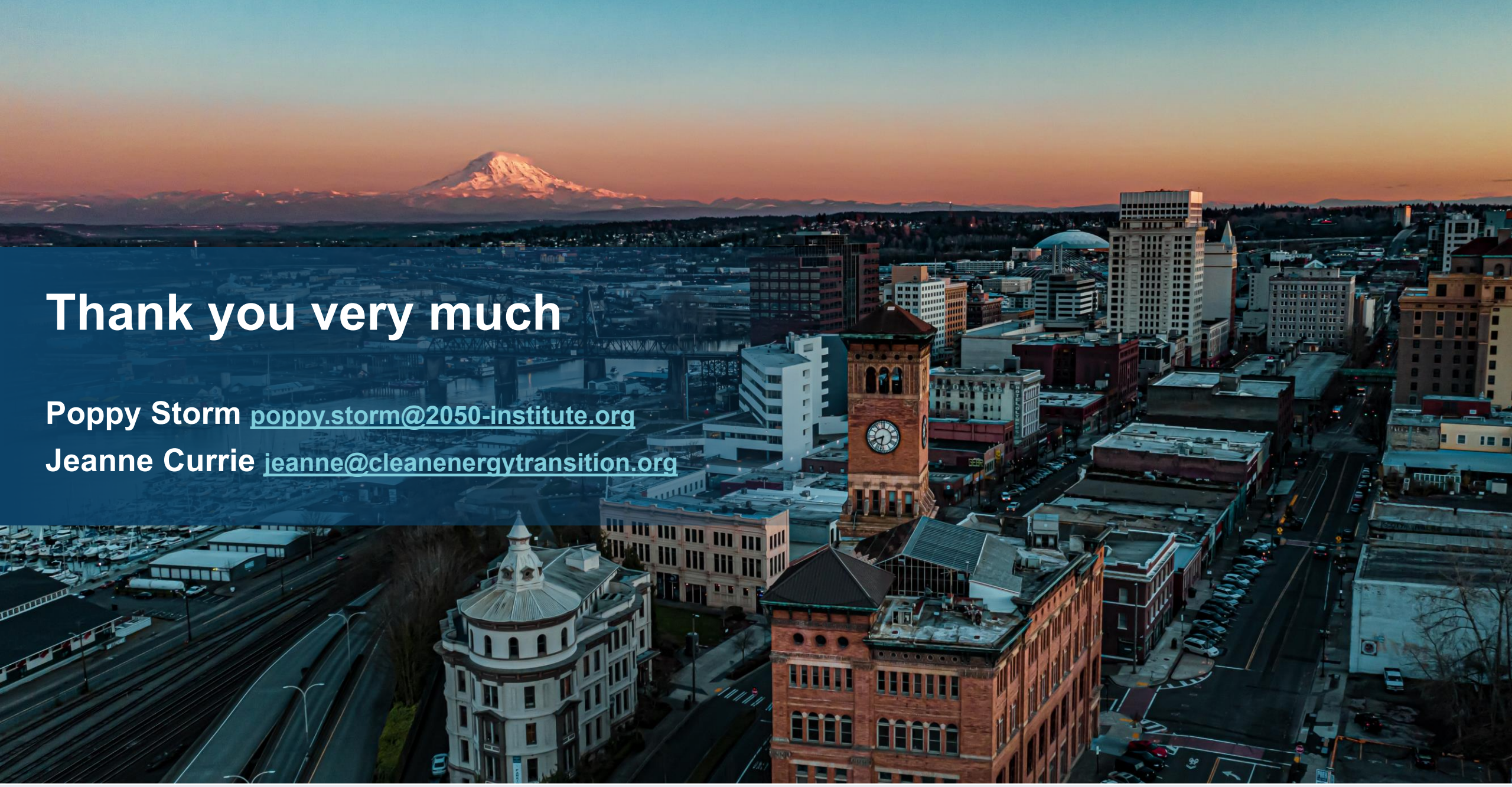
- Shift to replacing equipment with zero emissions solutions by 2030
- Find out more about other strategies in our reports and/or share with others
- Stay tuned for a SCALE 2030 roadmap, scorecard, and targets in 2026
- Sign up for CETI mailing list for updates and ways to get engaged in SCALE 2030

Please reach out with additional feedback or ideas

Q&A and Discussion

- Questions?
- In your view, what are the biggest barriers and opportunities for rapidly scaling building decarbonization by 2030?
- What strategies in the SCALE framework resonate as most essential for scaling building decarbonization?





Thank you very much

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