


2025 IMPACT REPORT

April 2026





Clean Energy Transition Institute

Letter from the Executive Director

The Clean Energy Transition Institute (CETI) had a productive and impactful year in 2025, despite significant headwinds created by the Trump Administration's antipathy toward decarbonization.

Highlights include completing technical and economic assistance in support of both the Oregon Energy Strategy and Washington's Comprehensive Climate Action Plan, as well as the release of two signature papers on scaling building decarbonization in Washington.

We contributed to a study examining rural clean energy economics and community engagement on renewable energy projects, as well as one that looked at the economic impact of transitioning Washington's refinery workers.

We released an interactive story map with visualizations that explore the benefits of community-scale solar and held a highly successful forum on the impacts of data center energy use on the Northwest clean energy transition. We also engaged in efforts to expand Western electricity grid transmission.

With CETI firmly established as the go-to organization for rigorous, unbiased research and analytics to accelerate an equitable clean energy transition in the Northwest, I am stepping aside as founding Executive Director to make way for a leader who will take the organization to new heights.

Building CETI with incredibly talented colleagues, dedicated Board members, and committed funders has been the greatest privilege. I am deeply proud of what we achieved together and ever so grateful to have had the opportunity to work with all of you. I leave CETI primed for further success and quite confident the organization will remain a critically important force for advancing viable clean energy solutions in the Northwest.

Very truly yours,

Eileen V. Quigley
Executive Director

Letter from the Board President

In 2025, the Clean Energy Transition Institute (CETI) continued to provide a unique value proposition in the Northwest. We helped fill the voids left by changes in national climate policy. We provided a range of constituents with unbiased analytics that shed light on the opportunities, risks, and trade-offs of different strategies to decarbonize our region at the pace and scale required to avert climate change's worst impacts. We added new Board members and grew the CETI Team.

CETI is now a well-established and trusted source of independent, nonpartisan research and analysis working to accelerate an equitable clean energy transition in the Northwest. The need for rigorous analysis at the state and regional level is growing, and CETI is uniquely positioned to illuminate solutions and engage stakeholders in fact-based conversations about the opportunities and tradeoffs ahead.

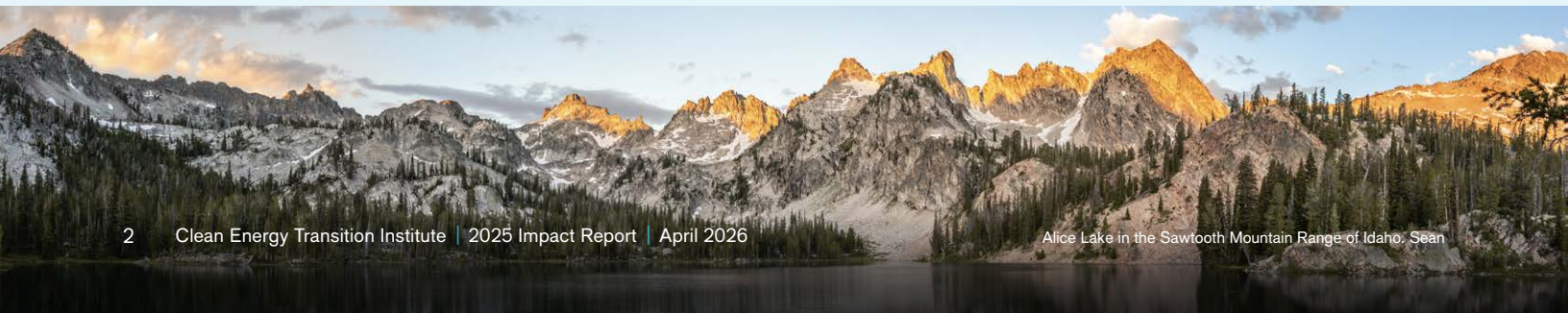
2026 will be pivotal for CETI. Our founding Executive Director, Eileen V. Quigley, has built something durable—a respected research institution with a talented team, a sound financial foundation, and a hard-won reputation for credibility across sectors that don't always agree. After eight years of extremely hard work, Eileen has decided to move on.

Our next leader will inherit everything Eileen built and will shape what CETI will become, what it prioritizes, how it grows, and what role it plays in one of the most consequential periods for clean energy in the Northwest's history.

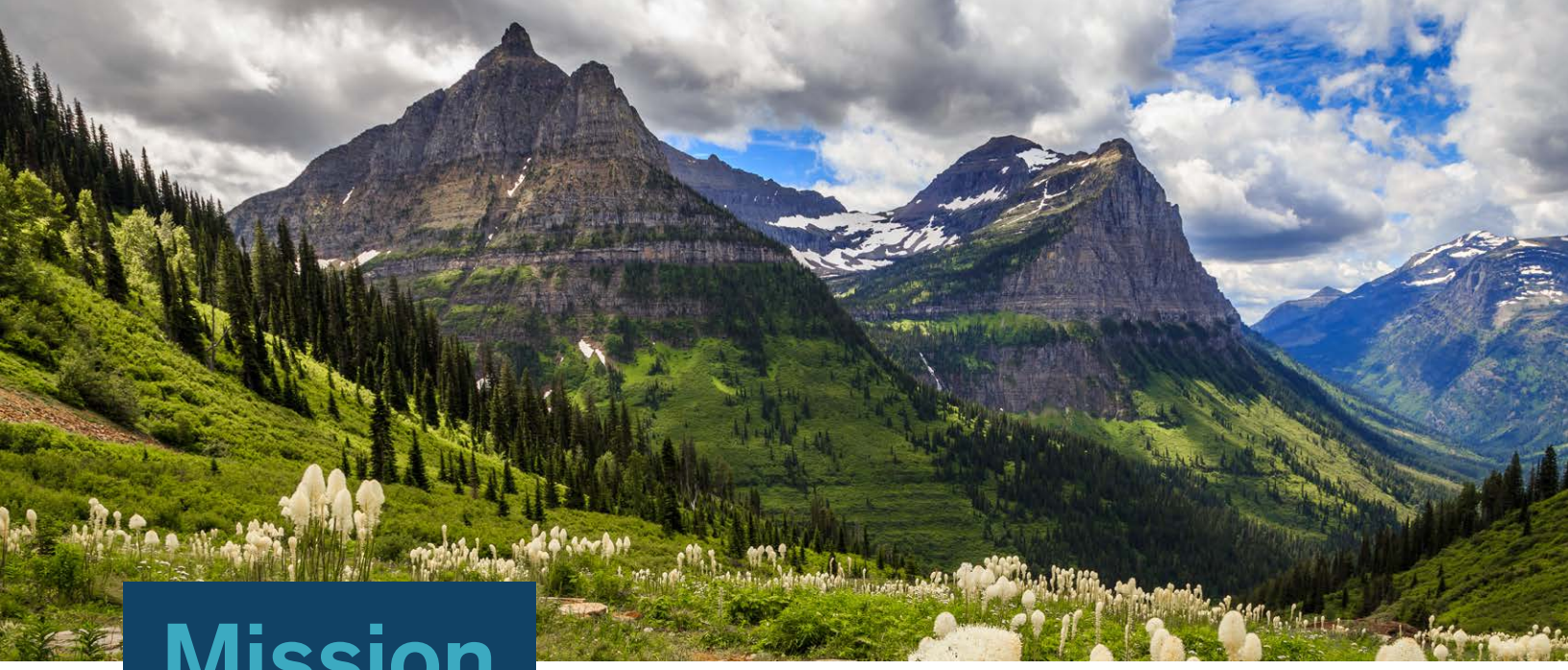
The Board of Directors is excited about CETI's next chapter and fully committed to helping the organization continue to thrive and play its crucial role in accelerating equitable decarbonization in the Northwest. Thank you for your support.

Sincerely,

Liz Thomas
Board President



Alice Lake in the Sawtooth Mountain Range of Idaho. Sean



Mission

Who We Are

The Clean Energy Transition Institute (CETI) is an independent, nonpartisan research and analysis nonprofit whose mission is to accelerate an equitable clean energy transition in the Northwest.

Our Value

We have a very small window within which to address the climate crisis. Governments, utilities, businesses, advocates and, policymakers in the Northwest must move swiftly to implement viable and equitable clean energy solutions. These decision-makers value our data-driven approach, unbiased expertise, and convening ability.

Learn more about CETI:
cleanenergytransition.org

Clean Energy
Transition Institute

What We Do

We advance technical, economic, and equitable decarbonization solutions tailored to Idaho, Montana, Oregon, and Washington through:

Research & Analysis: Providing independent, unbiased research and analytics on deep decarbonization pathways.

Decarbonization Studies: Framing, translating, and demystifying complex decarbonization solutions and their impacts on emissions, community health, and workforce.

Convenings: Bringing together regional partners to debate the trade-offs and opportunities inherent in the clean energy transition.

Fact-Based Conversations: Using our unbiased analysis to encourage fact-based conversations that steer limited resources toward equitable policy solutions and strategies.

Above: Glacier National Park, Montana. Stephen

2025 Program and Project Highlights

The CETI Team engaged in a wide range of projects across our program areas in 2025 as we worked to accelerate an equitable clean energy transition in the Northwest.

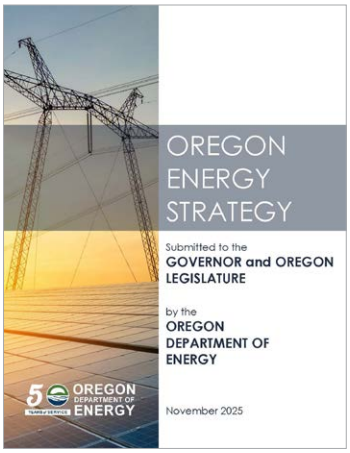
High voltage electric transmission lines in eastern Oregon. Cam

Oregon Energy Strategy

From April 2024 to November 2025, CETI provided technical support to the Oregon Department of Energy (ODOE) for a state Energy Strategy that outlines potential actions to meet Oregon's energy policy objectives. The technical support included:

- Participating in a robust public engagement process to receive input on the technical modeling and policy recommendations
- Performing energy modeling and analysis to examine potential pathways to reach Oregon's energy and climate objectives while maintaining reliability across the energy system
- Developing complementary analyses to inform policy discussions, including a household energy wallet analysis, air quality modeling, and geospatial mapping
- Examining employment effects to identify the scale of job growth that might be expected across the energy pathways scenarios
- Working with ODOE to review communication materials and support the launch of the final Oregon Energy Strategy in November 2025

Learn more about the project



Read the Oregon Energy Strategy

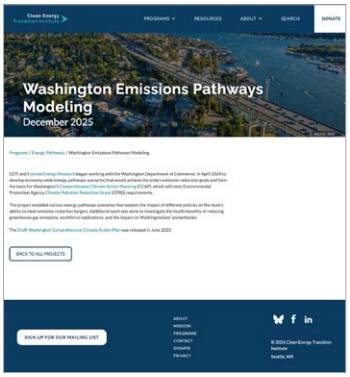
Above: Haystack Rock in Oregon. Gleb Tarassenko

Washington Emissions Pathways Modeling

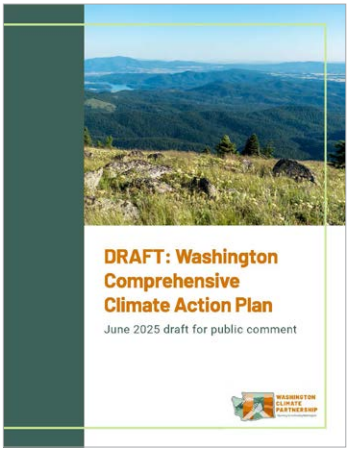
CETI and Evolved Energy Research began working with the Washington Department of Commerce in April 2024 to develop economy-wide energy pathways scenarios that would achieve the state's emission reduction goals, form the basis for Washington's Comprehensive Climate Action Planning (CCAP), and meet Environmental Protection Agency Climate Pollution Reduction Grant (CPRG) requirements.

The project modeled the impact of different policies on Washington's ability to meet emission reduction targets. Additional work was done to investigate the health benefits of reducing greenhouse gas emissions, workforce implications, and the impact on Washingtonians' pocketbooks. The Draft Washington CCAP was released in June 2025, and includes:

- A record of Washington's greenhouse gas emissions from 1990 through 2021
- Statewide greenhouse gas emissions limits and projections through 2050 based on current policies
- An economy-wide climate pollution reduction plan with 36 greenhouse gas reduction strategies
- An analysis of benefits and impacts of proposed climate actions, especially for vulnerable and overburdened populations
- A preliminary workforce analysis

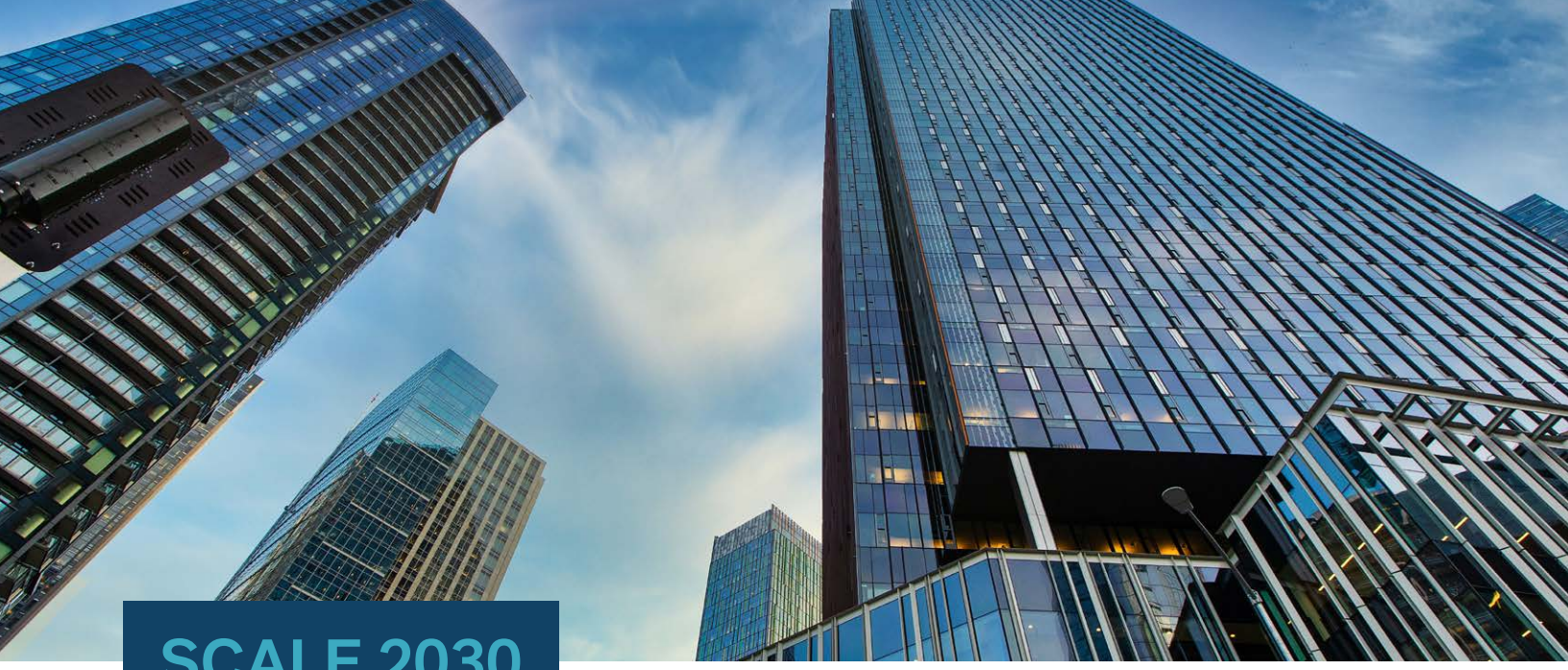


Learn more about the project



Read the Draft Washington Comprehensive Climate Action Plan

Above: Lake Union in Seattle, Washington. adonis_abril



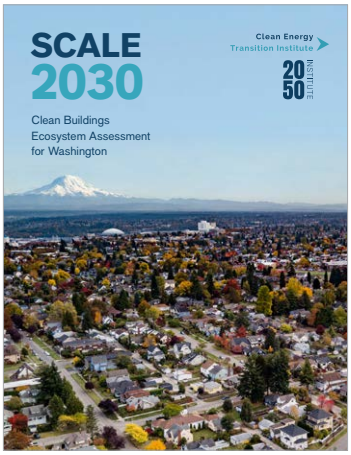
SCALE 2030

SCALE 2030 is a CETI and 2050 Institute project designed to shift Washington's building decarbonization approach from one focused on incremental energy efficiency and emissions reductions to a systemic framework that will enable rapid market transformation.

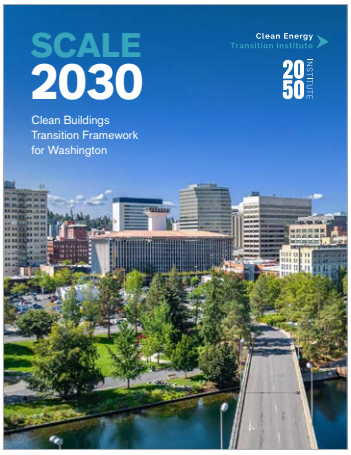
In May of 2025, CETI released two SCALE 2030 papers:

- *SCALE 2030: Clean Buildings Ecosystem Assessment for Washington* compiles existing data and research from state, regional, and federal sources to develop a holistic view of the existing building ecosystem in Washington.
- *SCALE 2030: Clean Buildings Transition Framework for Washington* outlines challenges to decarbonizing the building sector and proposes five strategies that emphasize building performance, increased and targeted funding, rapid market transformation, coordinated planning, and a regional implementation approach.
- A Key Insights resource summarizes the papers' most important takeaways.

CETI and 2050 Institute are now developing a roadmap to decarbonize Washington's building stock with our SCALE 2030 Roadmap Advisory Group.



Read SCALE 2030: Clean Buildings Ecosystem Assessment for Washington



Read *SCALE 2030: Clean Buildings Transition Framework for Washington*

Above: Skyscrapers in Seattle, Washington. Mat Hayward

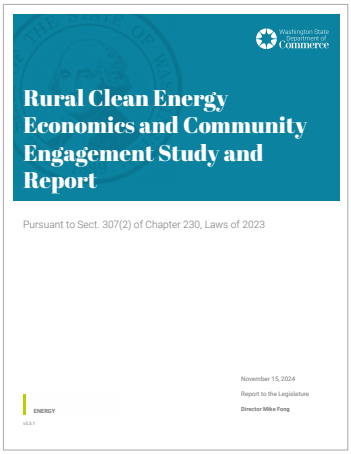
Rural Clean Energy Economics and Community Engagement

Beginning in December 2023, CETI worked with Ross Strategic and Industrial Economics, Inc. on a Rural Clean Energy Economics and Community Engagement Study and Report for the Washington Department of Commerce.

The study's purpose was to increase understanding among rural communities, organizations, government agencies, and policymakers about the potential opportunities and impacts of renewable energy development in rural communities throughout Washington.

The final report was published in January 2025. Findings were synthesized into eight recommendations for the Washington State Legislature to consider with future clean energy policies:

- Strengthen local involvement in clean energy siting and project development so rural communities have a meaningful role in the decision-making process.
- Guarantee increased rural community benefits and mitigate potential harm from clean energy projects.
- Safeguard and enhance the quality of life in rural communities as clean energy projects are developed.
- Improve transparency in the planning, development, and operation of clean energy projects.
- Explore an alternative taxation approach for large clean energy projects.
- Improve communication about sales taxes and clarify expectations about payback timelines for developer rebates.
- Increase transparency of economic and financial data reporting.
- Improve documentation of federal and state incentives.



Read *Rural Clean Energy Economics and Community Engagement Study and Report*

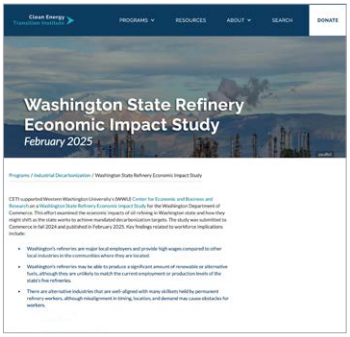
Above: Wind turbines in the Palouse in Washington. Myk Crawford

Washington State Refinery Economic Impact Study

CETI supported Western Washington University's (WWU) Center for Economic and Business and Research on a Washington State Refinery Economic Impact Study for the Washington Department of Commerce. This effort examined the economic and workforce impacts of oil refining in Washington state and how they might shift as the state makes progress toward mandated decarbonization targets.

The study was published in February 2025. Key findings related to workforce implications include:

- As major local employers, Washington's refineries provide high wages compared to other local industries in the communities where they are located.
- Washington's refineries may be able to produce a significant amount of renewable or alternative fuels, although they are unlikely to match current employment or production levels.
- There are alternative industries that are well-aligned with many skillsets held by permanent refinery workers, although misalignment in timing, location, and demand may cause obstacles for workers.



Learn more about the project

Read *Washington State Refinery Economic Impact Study*

Above: Refinery outside Anacortes, Washington. paulfell

The Sun Also Rises in Washington

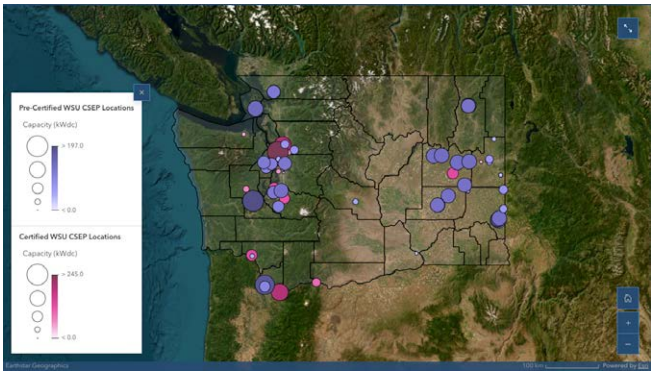
CETI worked in partnership with the University of Washington on this project, which was published in December 2025.

The Sun Also Rises in Washington is a StoryMap that explores the benefits of community-scale solar and highlights projects throughout the state with a series of visualizations.

Community-scale solar has the potential to play a critical role in a resilient and affordable clean energy future in Washington. Although the state does not possess the year-round high-quality solar resources as some other regions, solar is still a key part of a diverse clean energy resource mix. Distributed, community-scale solar in particular can not only provide electricity resources needed to meet growing electricity demand, but also offer additional local benefits to Washington residents.

Potential benefits of community-scale solar include:

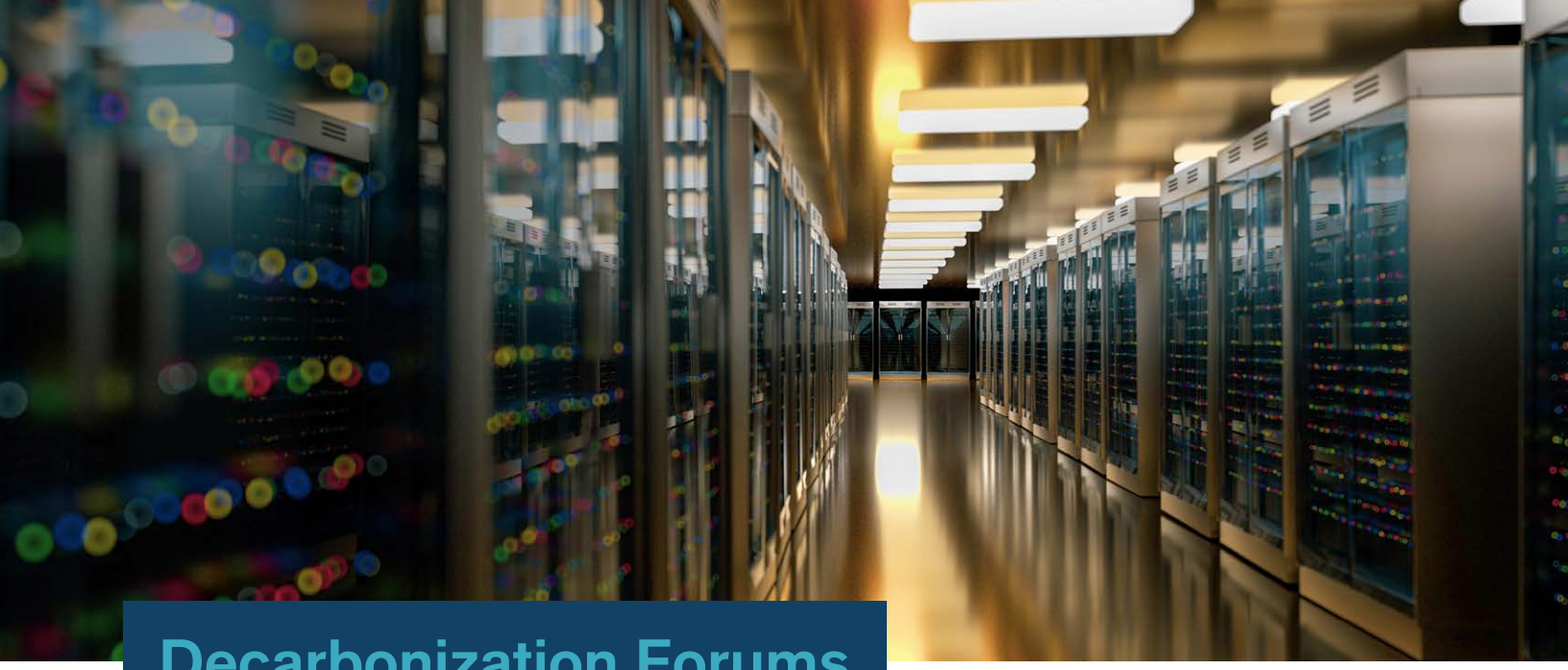
- Household energy savings
- Energy security
- Energy resilience
- Economic development
- Helping the region meet increased electricity demand



Completed and pre-certified community solar projects in Washington supported by the Community Solar Expansion Program

Explore *The Sun Also Rises in Washington*

Above: Solar panels on a barn. bilanol

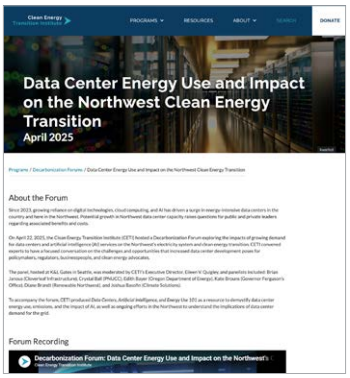


Decarbonization Forums

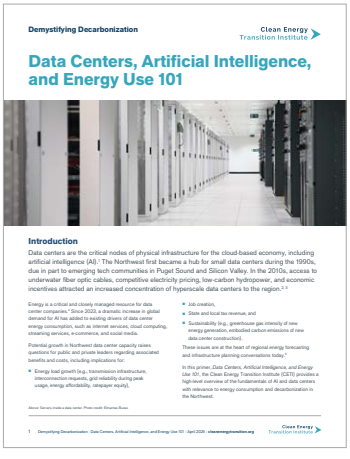
CETI presents decarbonization forums to illuminate and debate trade-offs of the most important and complex aspects of decarbonization in Northwest. The forums—ranging from in-person summits to virtual webinars—bring together experts, policymakers, industry representatives, civil society organizations, and interested citizens to learn about and discuss the challenges and opportunities of transitioning to a clean energy economy.

In April 2025, CETI convened a forum, *Data Center Energy Use and Impact on the Northwest Clean Energy Transition*, to explore the impacts of growing demand for data centers and artificial intelligence (AI) services on the Northwest's electricity system and clean energy transition.

- The panel, hosted at K&L Gates in Seattle, was moderated by CETI's Executive Director, Eileen V. Quigley. Panelists included: Brian Janous (Cloverleaf Infrastructure), Crystal Ball (Pacific Northwest Utilities Conference Committee), Edith Bayer (Oregon Department of Energy), Kate Brouns (Governor Ferguson's Office), Diane Brandt (Renewable Northwest), and Joshua Basofin (Climate Solutions).
- To accompany the forum, CETI produced *Data Centers, Artificial Intelligence, and Energy Use 101* as a resource to demystify data center energy use, emissions, and the impact of AI on the Northwest electricity grid.



Learn more about the forum



Read *Data Centers, Artificial Intelligence, and Energy Use 101*

Above: Data center server room. kwarkot

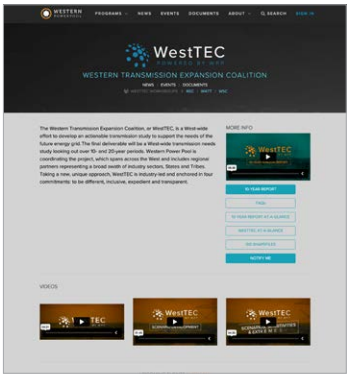
Western Transmission Expansion Coalition (WestTEC)

The Western Transmission Expansion (WestTEC) is a West-wide effort to develop an actionable transmission study to support the needs of the future Western energy grid. The final deliverables will be two West-wide transmission needs studies looking out over 10- and 20-year periods, respectively.

Western Power Pool is coordinating the project. CETI staff Eileen V. Quigley and Jeanne Currie are participating as members of the Regional Engagement Committee (REC). The REC is WestTEC's primary stakeholder engagement group. It is responsible for reviewing proposals, scopes of work for technical studies and other deliverables, and for providing feedback and recommendations to the Steering Committee. CETI Board members are also engaged in this work, with Robb Davis co-chairing the REC and Crystal Ball serving on the Steering Committee.

If you want to learn more about the WestTEC project, visit the official website to:

- Read the latest news
- Explore past and future events
- Access a library of project documents



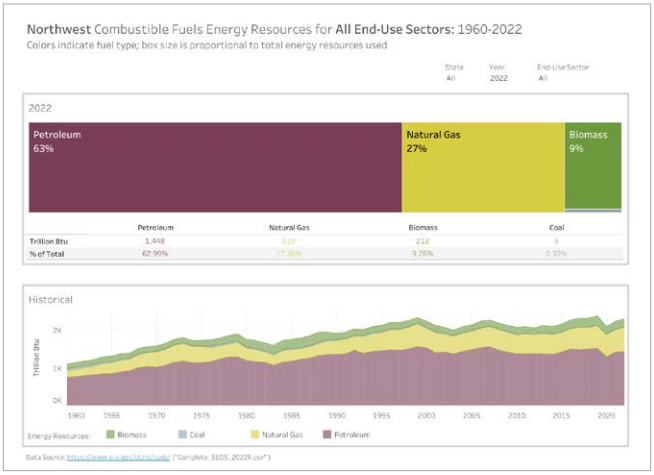
Learn more about WestTEC

WestTEC
POWERED BY WPP

Above: High-voltage transmission lines. chathuporn

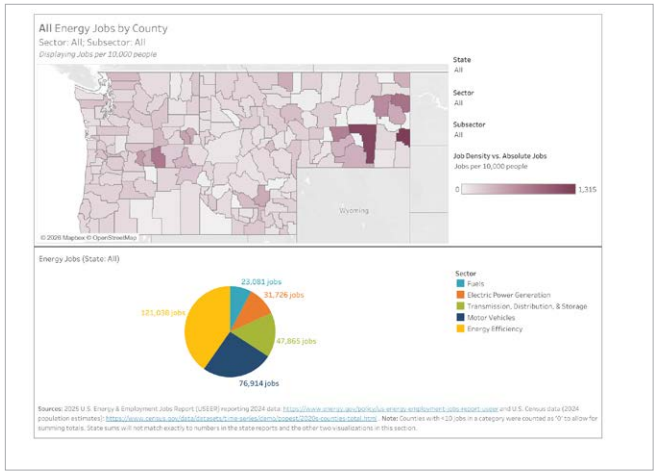
Northwest Clean Energy Atlas

The Northwest Clean Energy Atlas provides interactive tools to explore energy data relevant to deep decarbonization in Idaho, Montana, Oregon, and Washington. In 2025, CETI updated several visualizations to reflect currently available data. Some highlights include:



Northwest Combustible Fuels Energy Resources and Uses

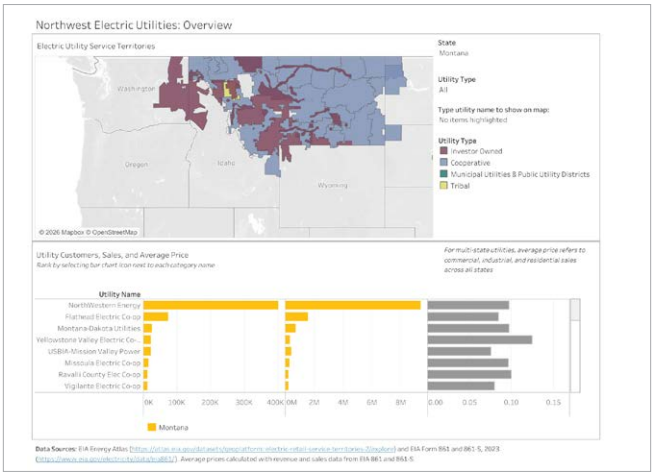
This visualization was updated with data from the U.S. Energy Information Administration. It shows the combustible fuels used directly in end-use sectors in the Northwest, both historically since 1960 and in 2022. It can be filtered by state, year, and end-use sector.

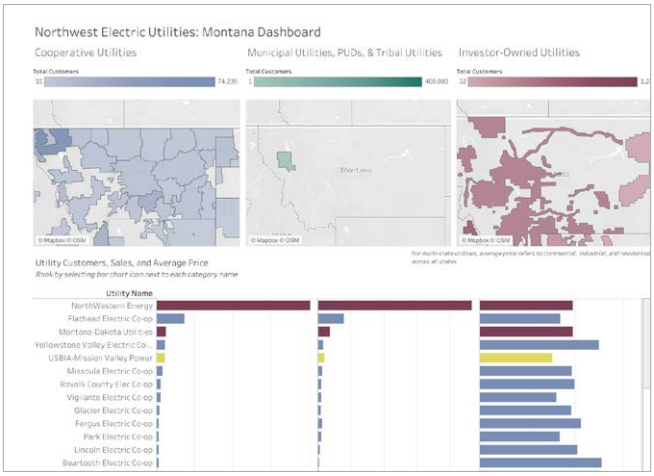


Northwest Energy Jobs by County

This visualization displays energy jobs in the Northwest by state and county, according to 2024 data from the U.S. Energy & Employment Report (USEER). It can be filtered by state, sector, and subsector.

Above: Wind turbines in Montana. Mark Stevens





Northwest Utilities Overview

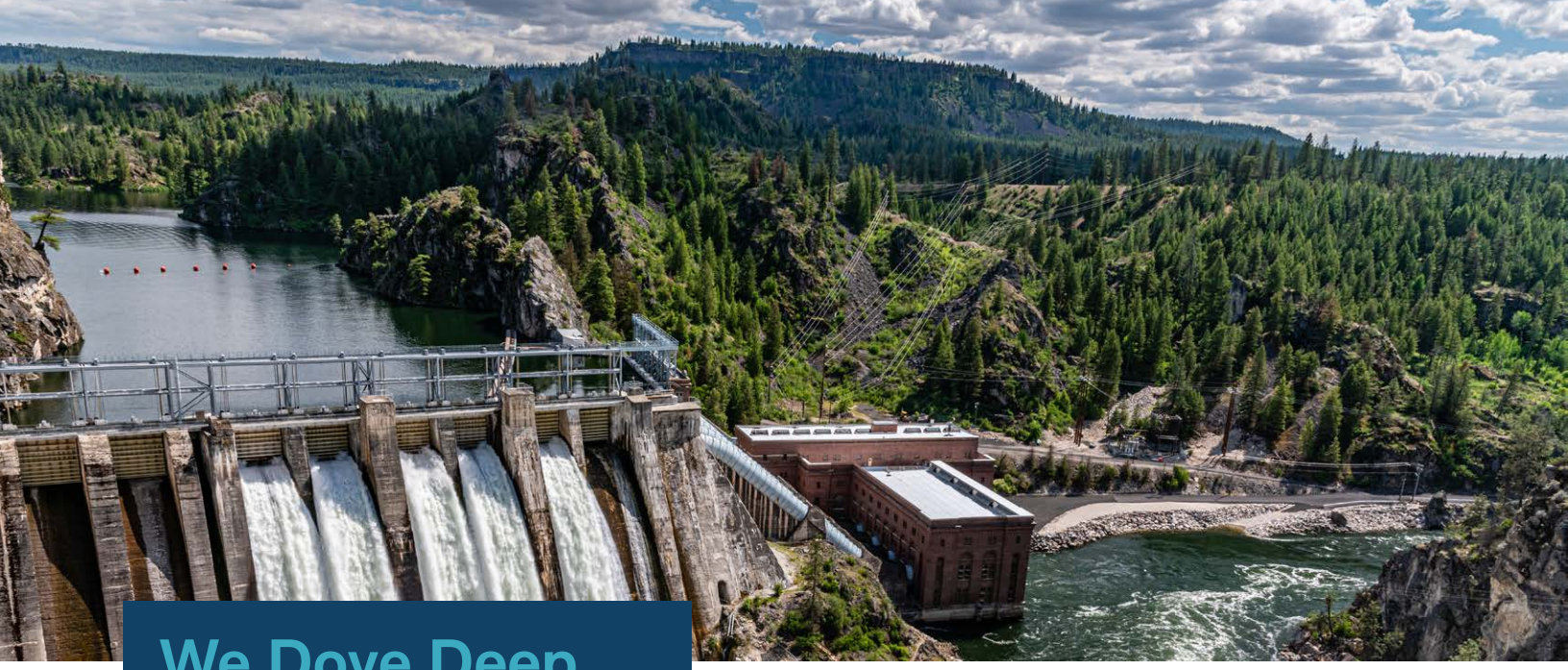
This new visualization features utility data for all four Northwest states and has become our most frequently visited Atlas resource. You can toggle between tabs to see an overview of the entire Northwest—filterable by state and utility type—as well as utility dashboards for each individual state.

Montana Utility Dashboard

This Montana Utility Dashboard is an example of the state-level visualizations included in the Northwest Utilities Overview. Each dashboard shows maps of utility areas and features customer, sales, and average price data for every utility in the state.

At the end of the year, CETI went on a virtual road show to share the Northwest Clean Energy Atlas with clean energy partners across the region. You can check out the recording, which explains how to interact with Atlas visualizations, on the Atlas website.

Explore the Northwest Clean Energy Atlas



We Dove Deep. . .

CETI's 2025 Deep Dive series explored key issues that emerged through our programmatic work:

Understanding How the EIA is Measuring Noncombustible Renewables →

Insights and Highlights from Washington's Rural Clean Energy Study and Report →

Insights form SCALE 2030: Clean Buildings Ecosystem Assessment →

Community Benefits Agreements: Opportunities, Barriers, and Best Practices →

Tribal Benefits Agreements: Opportunities, Barriers, and Best Practices →

Exploring the Role of Green Banks in Washington and Beyond →

Exploring Key Northwest Trends from Recent Energy Jobs Reports →

Exploring Community-Scale Solar in Washington →

Oregon Energy Strategy: Energy Pathways Analysis →

Oregon Energy Strategy: Complementary Analyses →

Oregon Energy Strategy: Jobs Analysis →

Explore the Deep Dive Series

Above: Long Lake Dam on the Spokane River. Sam Judy

And We Demystified. . .

A core part of CETI's mission is to demystify complex aspects of decarbonization and the clean energy transition in the Northwest. Here are the topics we explained in 2025 with our Demystifying Decarbonization series:

Demystifying the Northwest Utility Landscape →

Geothermal's Role in Clean and Reliable Energy →

Demystifying Data Center Energy Use →

Idaho: 2025 Energy and Climate Policies Recap →

Montana: 2025 Energy and Climate Policies Recap →

Oregon: 2025 Energy and Climate Policies Recap →

Washington: 2025 Energy and Climate Policies Recap →

Demystifying Electricity Resources and Emissions in Oregon and Washington →

Oregon's POWER Act Addresses Ratepayer Impact of Large Energy Users →

The Ins and Outs of Siting and Permitting in the Northwest →

Moving Forward with Day-Ahead Markets →

Best Energy Podcasts of 2025 →

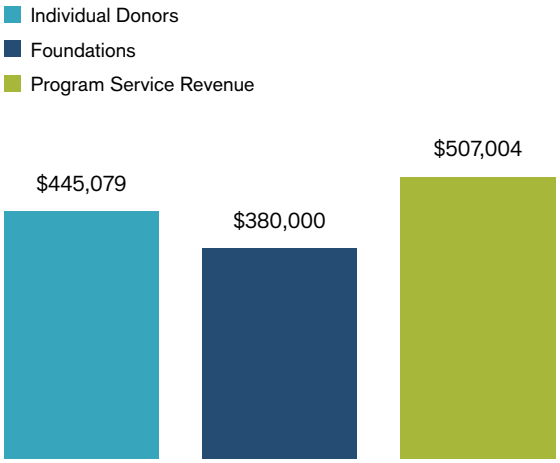
Explore the Demystifying Decarbonization Series

Above: Solar panels at sunset. am

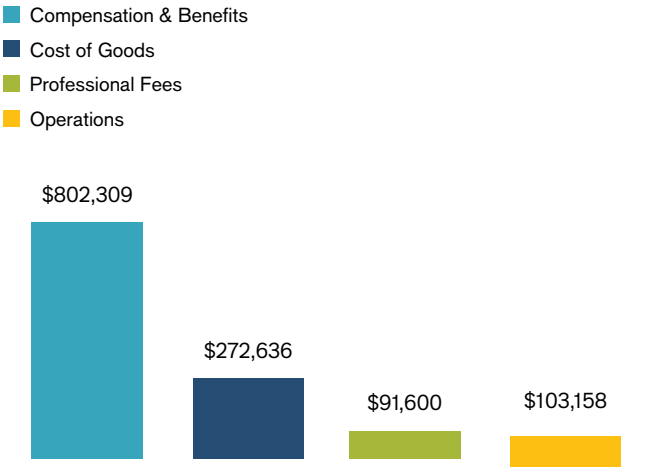
2025 Financials

While total 2025 revenue was less than budgeted, CETI ended the year on solid financial footing.

CETI 2025 Income – $1,332,083



CETI 2025 Expenses – $1,269,703



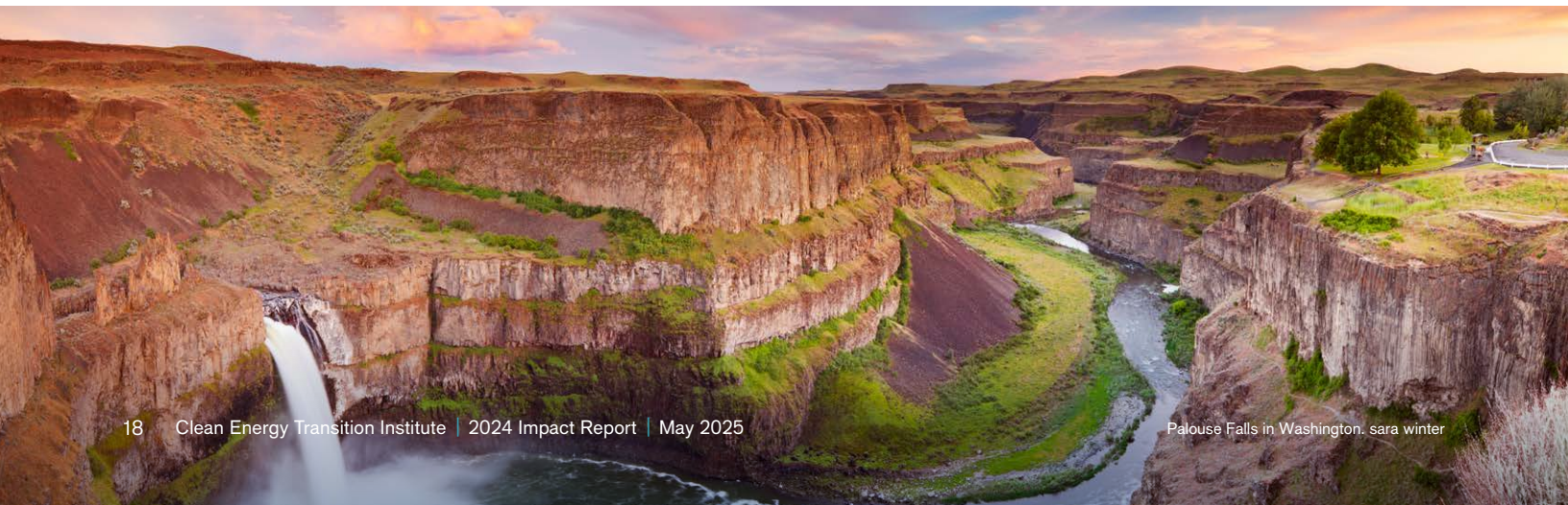
Income

CETI's income increased by $106,977 from 2024 to 2025, going from $1,225,106 to $1,332,083. Individual donors contributed $445,079; foundations grants totaled $380,000; and programs service revenue totaled $507,004. CETI sub-contractors received $272,636 of the service revenue and CETI retained $234,368.

Program service revenue was $82,405 less than 2024's service revenue (and $170,000 less than budgeted) because federally contracted revenue was canceled. However, the significant support CETI received from individual donors—$145,021 more than 2024; $67,000 more than budgeted; and the most individual donor support ever received during CETI's eight-year history—more than compensated for the loss in service revenue. CETI received $45,000 more in foundation grants in 2025 than in 2024 and $55,000 more than budgeted.

Expenses

In 2025, CETI spent a total of $997,067 in operational expenses (not including the cost of goods), which was $29,301 less than in 2024. Compensation increased $275,607 over 2024 reflecting hiring two director-level staff. Consultant fees were $91,600, which was $83,368 less than 2024.



Palouse Falls in Washington. sara winter

2025 Donors

The Clean Energy Transition Institute gratefully acknowledges the funders whose financial support sustained our work this year:

Grant Support

Climate Solutions
McKinstry Charitable Foundation
Renewable Northwest
The Russell Family Foundation
Seattle Foundation
Stolte Family Foundation
Sustainable Path Foundation
University of Washington
Population Health Initiative

Corporate Matching Funds

A&R Solar
Bill and Melinda Gates Foundation
Google
McKinstry
Microsoft
Nike, Inc.
Salesforce

Individual Donors

$25,000—$75,000

Anonymous
Jabe Blumenthal & Julie Edsforth
Linda & David Cornfield
Ordinary People Foundation
Poicephalus Fund
Valerie Tarico & Brian Arbogast

$10,000–$24,999

Anonymous
Lee & Karen Fairchild
Grousemont Foundation
(Lauren Rolfe)
David A. Jones, Jr. &
Mary Gwen Wheeler
The Vandeventer Foundation

$5,000–$9,999

Brynn Arborico
David & Leigh Bangs
Eric & Luann Berman
William Donnelly
Kathleen & Michael Hebert
John McGarry & Michelle Wernli
Rosemary C. Quigley
Liz Thomas & Ronald Roseman

$2,000–$4,999

Anonymous
Marley Arborico
Robb Davis
Michael Ehrenberg & Donna Richman
David Finn & Katharine Harkins
KC Golden
Andy Gordon
Arlene Levy
Ruth Lipscomb
Ross & Lisa Macfarlane
McKinstry Staff
Eileen V. Quigley
Jennifer & Jon Roskill
Xixi & Jonathan Shakes
Ellen Stearns
Stephen & Liann Sundquist

$1,000–$1,999

Nur Bernhardt
Joseph Bogaard
Todd Currie
Greg & Kathe Fowler
Garnet Creek Consulting (Kim Zentz)
Bonnie Frye Hemphill
Mariah Kennedy
Jessica & Matthew Lindmark
Alex Mertens
Mathis & Steven Powelson
Eric & Heather Redman
Thomas Smithson
Amy Solas
Bill Way
Rogers & Julie Weed

$5–$999

Andrea Axel
Crystal Ball
John Bartlett
Bruce Bassett
Annika Berman
J. Bradley Brickman
Rachel Brombaugh
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Michelle Mueggler
Geri Nelson
The One Love Fund
Kathleen Pierce
John Plaza
Jamie Ptacek
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Kirk Quistorff
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Samish Bay, Washington. CascadeCreatives

Request for Support

We are proud of all that we have accomplished since our inception in 2018, and we could not have come so far without the dedicated support of the CETI community.

As we look forward to 2026 and beyond, we hope that you will join us in helping make the Northwest a leader in the clean energy transition.

Donate: Scan this code to donate to CETI today or visit cleanenergytransition.org/donate

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