

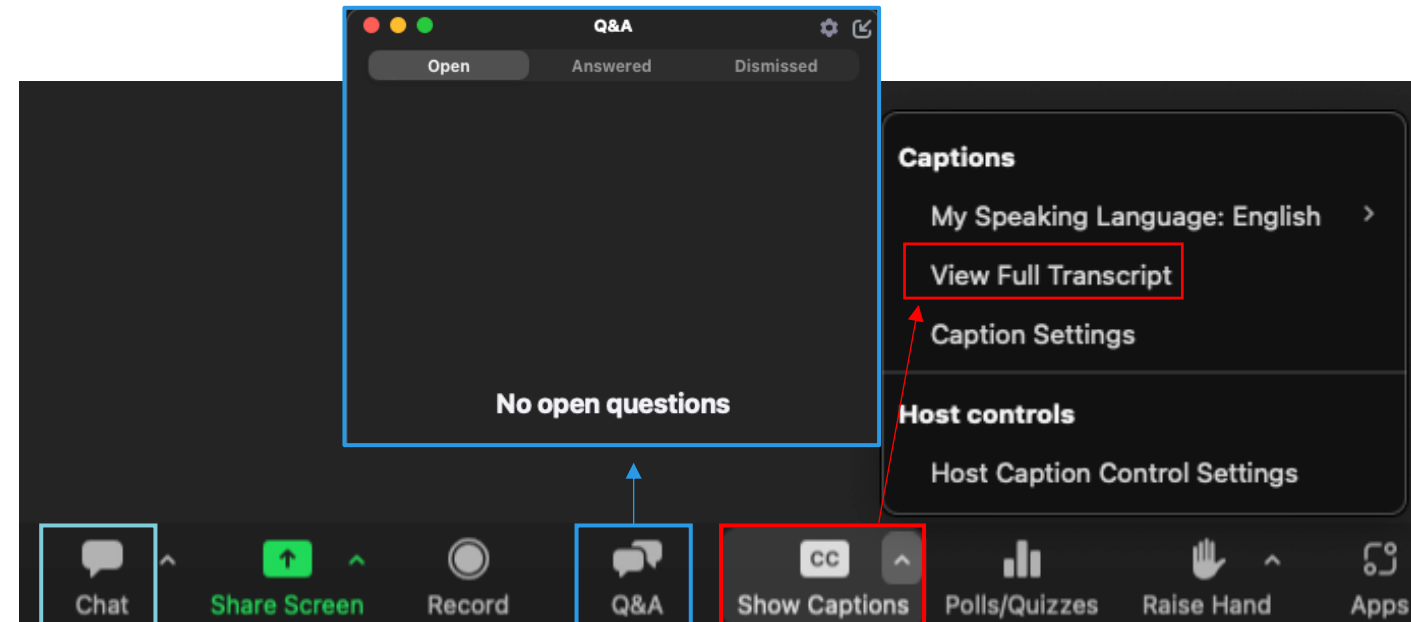


SCALE 2030: Clean Buildings Roadmap for Washington

June 2, 2026

Webinar Logistics

- Webinar is being recorded
 - Recording and slides will be shared
- We will be posting links and resources in the **chat**
- Ask questions in the **'Q&A' box**
- Option to enable live transcripts with **'View Full Transcript'** setting
- If you have technical difficulties or exit out of the webinar and can't get back in, email jamie@cleanenergytransition.org



Clean Energy Transition Institute (CETI)

- **What We Are:** Independent, nonpartisan research and analysis nonprofit
- **CETI's Mission:** Accelerate an equitable clean energy transition in the Northwest
- **CETI's Role:**
 - Provide unbiased research and analytics
 - Convene diverse stakeholders for fact-based conversations



2050 Institute

- **What We Are:** Clean buildings strategy, policy, and research think tank
- **2050 Institute Vision:** Strategic building decarbonization
- **2050 Institute Role:**
 - Provide research and analysis
 - Develop strategies, frameworks, policies, and programs
 - Partner with utilities, policymakers, and market actors to deliver clean buildings at scale in the Northwest and beyond



Presenters



Poppy Storm
Founder
2050 Institute



Jeanne Currie
Research Analyst
CETI

Agenda

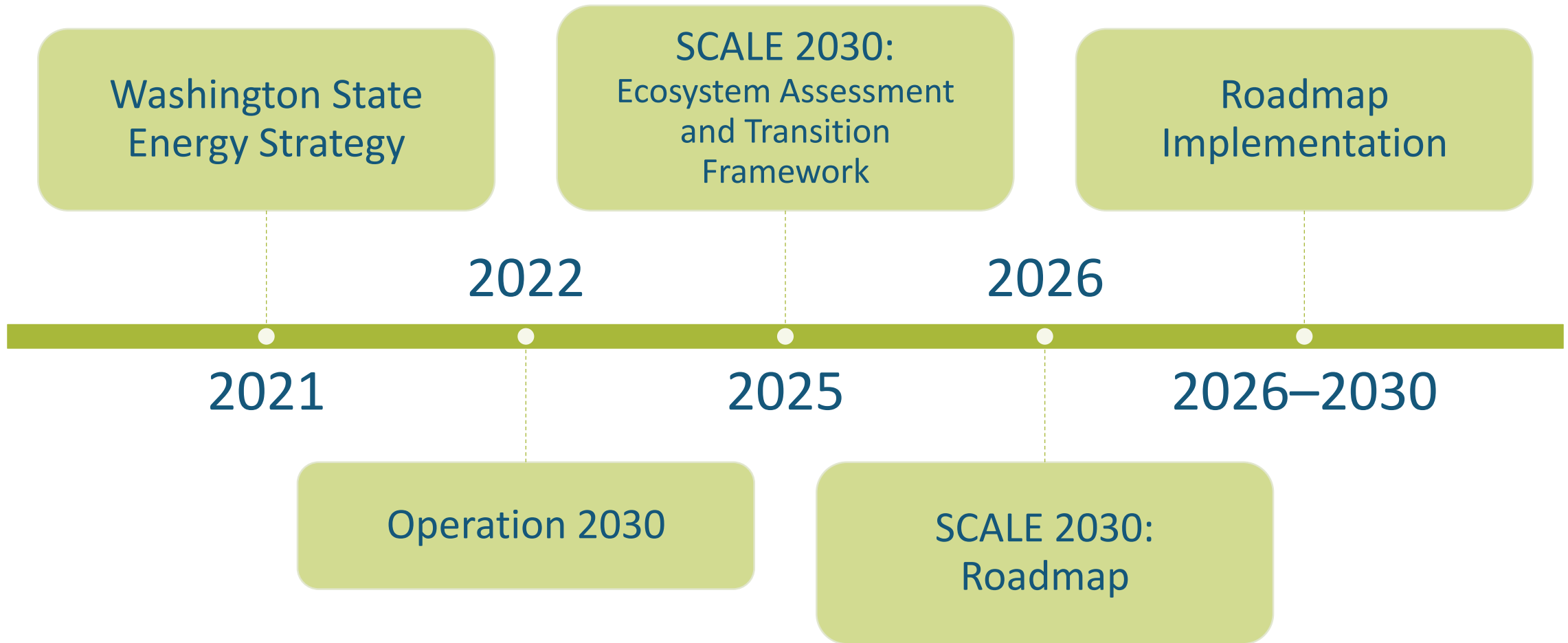
- Welcome
- SCALE 2030 Overview
- Roadmap Overview
- Roadmap Recommendations
- Roadmap Implementation
- Q&A





SCALE 2030 Overview

Background



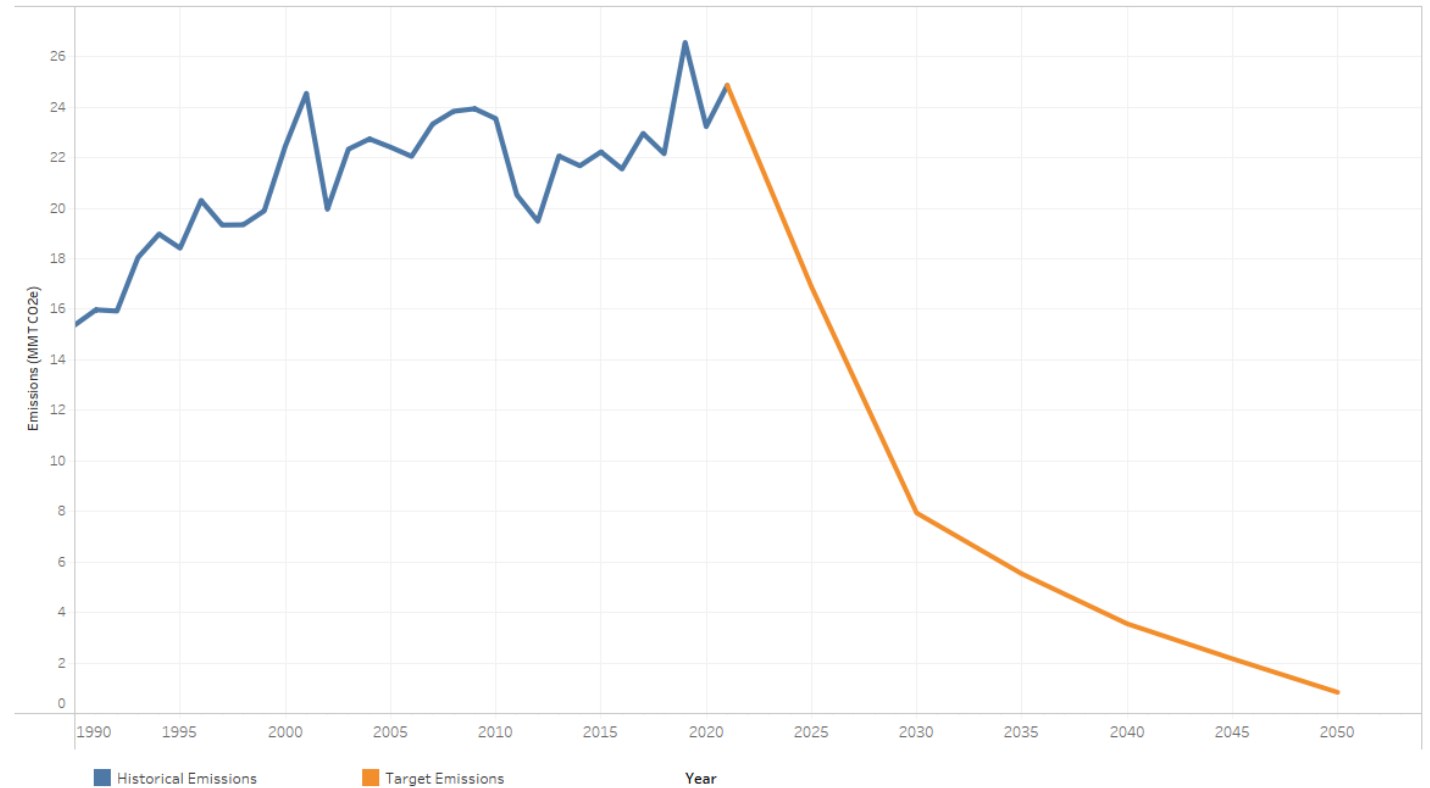
Why SCALE 2030?

Targeted, holistic, and systemic approach



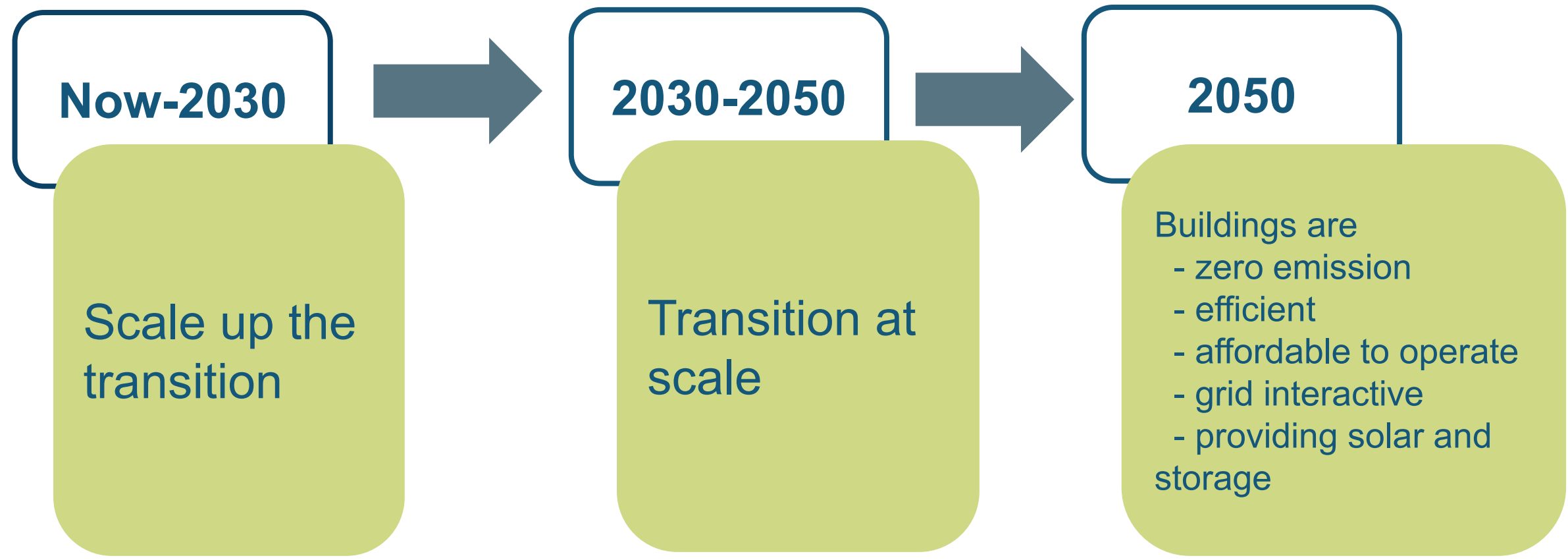
Achieve emissions limits, grid reliability, economic vitality

Emissions from Washington Commercial and Residential Buildings



Source: 2050 Institute and Clean Energy Transition Institute analysis using Washington Greenhouse Gas Emissions Inventory data; and projected energy use from deep decarbonization modeling performed for the Washington 2021 State Energy Strategy by Evolved Energy Research. Target emissions for 2021-2024 are adjusted to reflect updated emissions published after the State Energy Strategy.

SCALE 2030: Build the Capacity to Deliver Clean Buildings





Roadmap Overview

Roadmap Approach

- Build on existing policies, programs, successes, bridge gaps, and address systemic barriers to large-scale change
- Complete research to move from high-level strategies to detailed, specific actions
- Work with Advisory Group to get feedback, solidify priorities and critical actions



Roadmap Criteria Prioritize Scale

Actions and levers must be:

Primarily state-led

...AND at least one of the following:

Cover a critical gap in the current building sector ecosystem

Drive institutional and market capacity

Impact a high volume of buildings

Roadmap Addresses All Building Tiers & Segments

- Tier 1
 - Commercial buildings >50k sq. ft.
- Tier 2
 - Commercial buildings >20k sq. ft. and ≤50k sq. ft.
 - Multifamily buildings >20k sq. ft.
- Tier 3 (Proposed)
 - Commercial buildings ≤20k sq. ft.
 - Multifamily buildings ≤20k sq. ft.
 - Single-family homes ≤20k sq. ft.



Roadmap Complements Existing Climate Action

➤ State

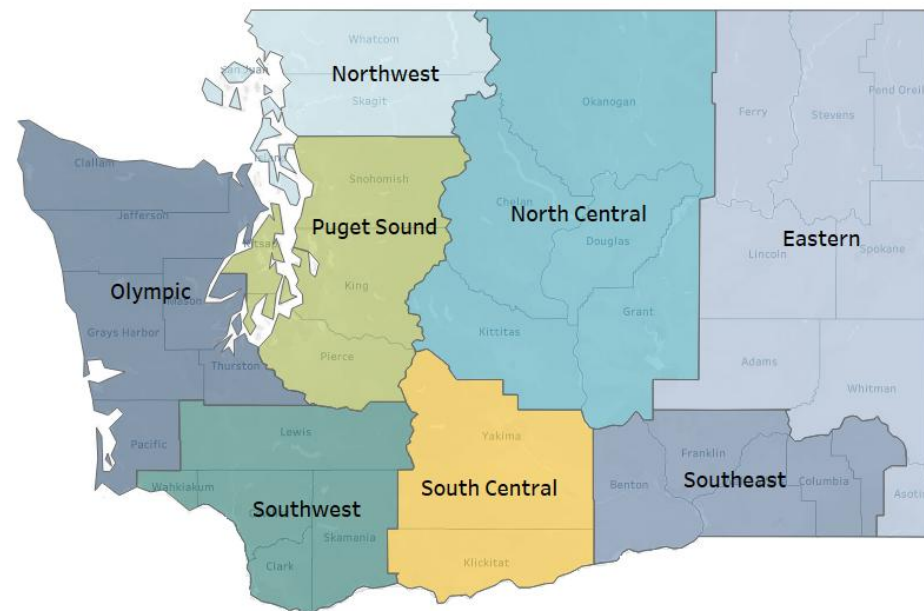
- Washington State Energy Strategy
- Comprehensive Climate Action Plan

➤ Regional/Local

- Puget Sound Clean Air Agency plan
- King County Building Decarbonization Strategy
- Other city/county climate plans

➤ Advocates + Program Implementers

- Weatherization and HEAR programs
- Energy code updates
- Policy proposals



Roadmap Recommendations

Levers for Systemic Change

Building Sector
Goals

Building Upgrade and
Performance Standards

Reliable Transition
Funding



Modern Utility
Regulation

Accessible
Financing Tools

Accelerated Market
Transformation

Roadmap Website

SCALE 2030

Roadmap Timeline Transition Framework Ecosystem Assessment Related Posts About



Roadmap Menu

- > Clean Buildings for Our Future
- > How We Get There
- > Levers and Actions
 - > Building Sector Goals
 - > Building Upgrade and Performance Standards
 - > Modern Utility Regulation
 - > Accelerated

Clean Buildings for Our Future

Washington is in the midst of a fundamental transformation from a fossil-fuel-based economy to a carbon-neutral economy. How we navigate this transition for residential and commercial buildings will have profound effects on the wellbeing and prosperity of future generations.

The *SCALE 2030: Clean Buildings Roadmap for Washington* (the Roadmap) connects the state's ambitious climate and clean energy goals with a long-term vision and whole-system implementation approach.

Align CBPS with State Energy and Emissions Goals

Lever

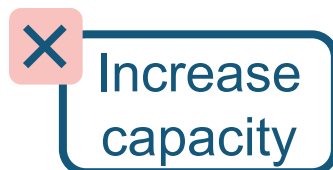
- Building Upgrade and Performance Standards

Goal

- Increase CBPS effectiveness

Action

- Establish interim and final performance targets
- Add emissions intensity and peak demand or demand flexibility as additional metrics
- Require public benchmarking of metrics



Phase in Zero-Emission Heating Standard

Lever

- Building Upgrade and Performance Standards

Goal

- Reduce/eliminate pollutants and emissions from space/water/other equipment (all tiers)

Action

- Implement a requirement that increases the sales share of zero emission heating equipment over time



✓ State-led

✗ Increase capacity

✓ Cover a gap

✓ All tiers

Stand Up a Washington Buildings Market Transformation Hub

Lever

- Accelerated Market Transformation

Goal

- Complement regional efforts with WA-specific MT focused on clean buildings

Action

- Launch a WA Clean Buildings Market Transformation Hub within Commerce



State-led



Increase capacity



Cover a gap



All tiers



Unlock No-Upfront Cost Upgrades with IUI

Lever

- Accessible Financing Tools

Goal

- Create new tools to address upfront costs

Action

- Inclusive Utility Investment can generate immediate savings for customers, with an upgrade paid back over time on a utility bill



State-led



Increase capacity



Cover a gap



Tier 3



Use I-937 to Advance DERs and Grid Utilization

Lever

- Modern Utility Regulation

Goal

- Update I-937 to reflect drive utilities to pursue additional load flexibility, distributed generation and storage, and grid utilization

Action

- Form a workgroup to consider new frameworks that could turn I-937 into a tool for grid mod, clean buildings, and affordability



State-led



Increase capacity



Cover a gap



All Tiers



Create a Clean Buildings Investment Charge

Lever

- Reliable Transition Funding

Goal

- Establish a funding source dedicated to WA's clean buildings transition

Action

- Add a surcharge to utility bills to continue capitalizing Washington Builds, invest in market transformation, fund rebates

✓ State-led

✓ Increase capacity

✓ Cover a gap

✓ All Tiers



Roadmap Implementation

Next Steps

- ▶ We have five years to make some bold moves
- ▶ Organize around key legislative priorities for 2027 and beyond
- ▶ Amplify and support existing work
- ▶ Advance early-stage actions from the Roadmap
- ▶ Look for additional aligned actions



Q&A



COMING SOON
THE NORTH PARK
PASSIVE HOUSE
DFH
Inspired by
only 4 climate goals
of the Paris Agreement & SDG

Thank you!

Please reach out with questions-
SCALE2030@cleanenergytransition.org

Another Passive House brought to you by
BERNHARDT CONTRACTING
Efficient by Design
www.berhardt.ca

THE NORTH PARK
PASSIVE HOUSE
CONTRACTING
512-456-7890
250-483-7376
www.knightsinsulation.ca

City of Victoria

HCMA
Hughes Condon Marler Architects

RDH
Making Buildings Better

Building Materials By
SLEGG LUMBER
ADMIRALS
388-5443

City Service
PLUMBING & HEATING
CONSTRUCTION CONTRACTORS
FOR PLUMBING, HEATING & GAS
250-744-3900

SIGA

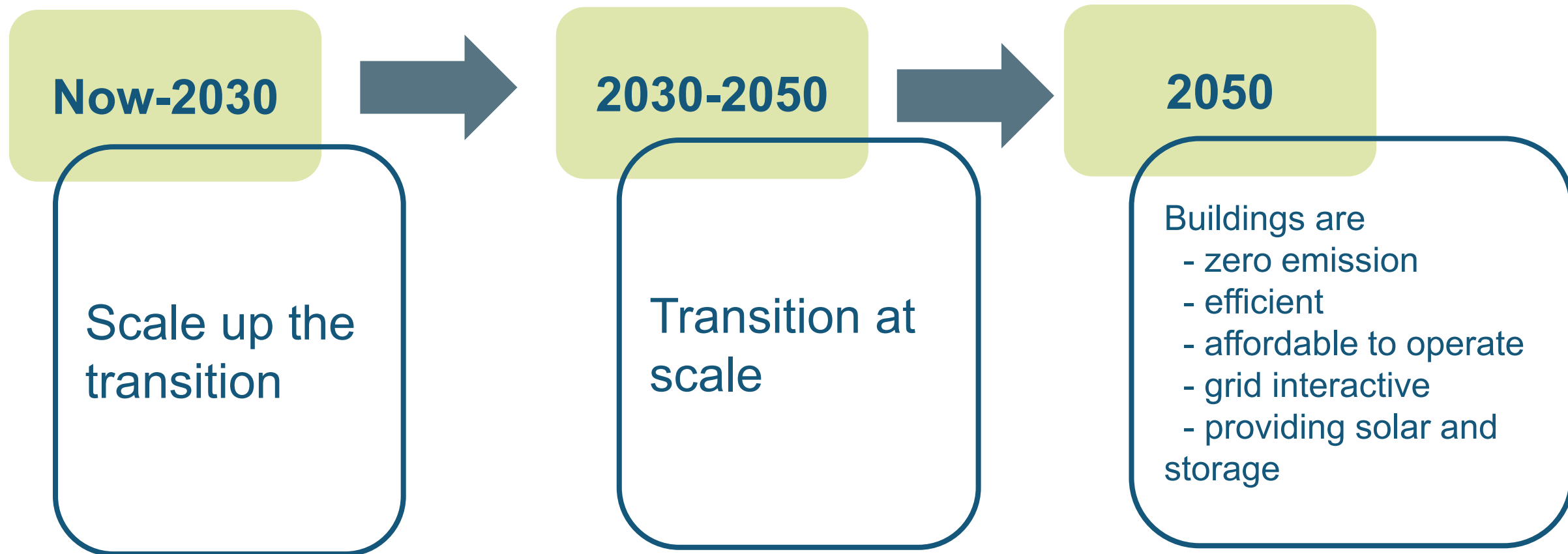
Another Quality Job by:
KNIGHTS INSULATION LTD
Residential & New Construction
250-483-7376
www.knightsinsulation.ca

Systemic Barriers to Large-Scale Transition

- Lack of clear building sector goals
- Policy gaps across all building segments
- Outdated utility regulation
- Programs/rebates with limited reach
- High costs and other market barriers
- Lack of accessible financing
- Lack of transition funding



SCALE 2030: Build the Capacity to Deliver Clean Buildings



Align CBPS with State Energy and Emissions Goals

Lever

- Building Upgrade and Performance Standards

Goal

- Make CBPS even more effective

Action

- Final performance targets and interim targets
- Add emissions intensity and peak demand or demand flexibility as additional metrics
- Require public benchmarking of metrics

