



Quarterly Technology Area Report (Q3 2025)



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Portfolio Information

A summary of the number of project submissions the program has received between July and September 2025 (Q3), and what project stage and technology area each submission represents can be found in Table 1 below. Also illustrated are the program cumulative totals in each category since the program began in May 2022. Please see the program [Technology Priority Maps](#) (TPMs) to learn more about the technology areas. The TPMs guiding the selection of projects through Q3 of this year were published between September and December of 2024. The latest TPMs, published this year, will apply to Q4 CalNEXT project submissions. During Q3, the team received 12 new project submissions.

Table 1: Project Submission Status Summary by Technology Area

	Q3 vs Cumulative (C)	Number of Projects at Project Stage					Projects Deferred*	Project Submissions	
		Completed	Reporting	Implementation	Project Planning	Scanning & Screening			
Technology Areas	Whole Building	Q3	2	1	1	2	0	0	5
		C	19	4	10	2	0	12	97
	HVAC	Q3	2	3	1	0	0	0	1
		C	24	7	18	1	2	12	121
	Water Heating	Q3	2	2	1	0	0	0	0
		C	15	2	11	0	0	11	58
	Process Loads	Q3	2	2	5	0	0	0	3
		C	18	2	18	1	1	16	112
	Lighting, Plug Loads and Appliances**	Q3	1	1	2	1	0	0	3
		C	4	2	8	3	1	6	47
	Portfolio Enhancement	Q3	0	0	1	0	0	0	0
		C	0	0	1	3	0	3	10
Total	Q3	4	9	11	3	0	0	12	
	C	80	17	66	10	4	60	445	

*The “deferred” project classification means these projects will not move forward at this time but will be revisited in the next program year to reassess if they meet future program needs and priorities.

**The TPM formerly known as Plug Loads and Appliances now encompasses Lighting, as reflected in its new name. All Lighting projects in flight have been reclassified under the Lighting, Plug Loads, and Appliances TPM

Figure 1 gives a breakdown of where this quarter’s project submissions came from, classified by submitter type.

Q3 Submissions by Submitter Type

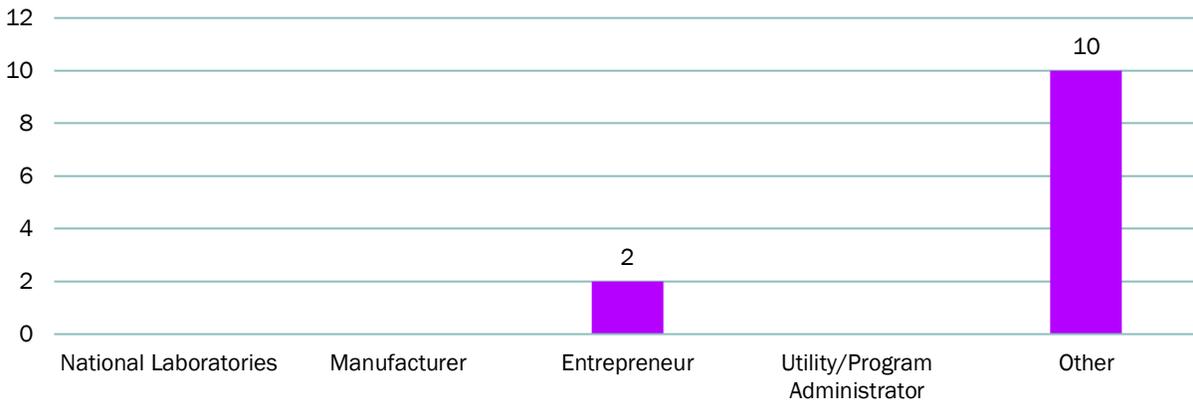


Figure 1: Program participant type

A summary of the number of projects that were selected to move forward, organized by TPM technology area, can be found in

Table 2. Included in this table are the count of projects for this quarter, broken out between technology development research (TDR) and technology support research (TSR) projects.¹

Table 2: Submissions Selected in Q3 by Project Type²

Technology Area	Count of Projects by Project Type	
	TDR	TSR
Whole Building	1	1
HVAC	0	0
Water Heating	0	0
Process Loads	0	0
Lighting, Plug Loads & Appliances	0	1
Portfolio Enhancement	0	0
Total	1	2

¹ Project type definitions can be found [here](#).

² 2 existing projects were split this quarter, resulting in 4 selected projects that were unscored. Instead, their adoption was agreed upon by partners in an internal poll.

Figure 2 displays a pipeline of projects that CalNEXT expects to be completed in each year of the program based on projects that have been selected for the program portfolio. This figure includes any projects that have been completed. As the figure shows, the program has completed 7 TSRs and 1 TDR for the year already.

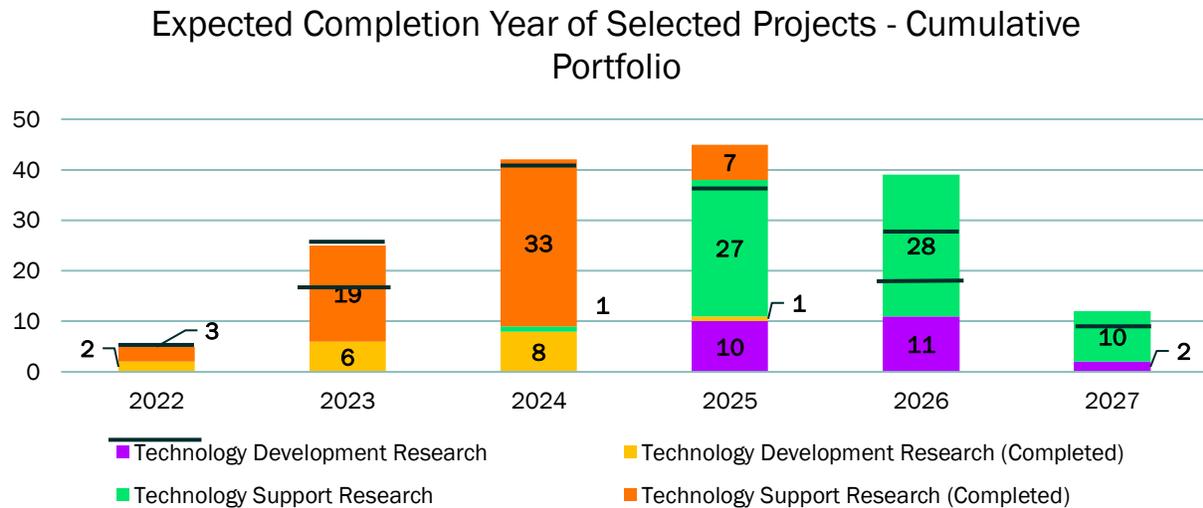


Figure 2: Selected project expected completion year (target number reflected as line)

Table 3 illustrates the results of the 2025 committed project goals.

Table 3: Results of 2025 Committed Research Project Portfolio

Research Type	2025 Target	Planned	Actualized	Percent Actualized
TDR	10	11	7	70%
TSR	32	34	28	88%
Focused Pilot	3	0	0	0%
Total	45	45	35	78%

*Projects are selected from both program partner and public submission.

Technology Area Information

Table 4 characterizes attributes associated with each of the selected projects from Q3. Attributes include TPM technology area and subcategory, and if the project is expected to have energy efficiency (EE) benefits, disadvantaged communities (DAC) and/or hard-to-reach (HTR) customer benefits, decarbonization (decarb) benefits, and/or load shifting.

Table 4: Q3 Selected Projects by TPM Subcategory and Attributes

TPM	Submission Name	TPM Subcategory	EE Benefit	DAC/HTR Benefit	Decarb Benefit	Load Shifting
Lighting, Plug Loads and Appliances	Outdoor Lighting Baseline Toolkit Data Collection	Advanced Approaches to Exterior Lighting	X	-	-	-
Whole Buildings	Smart-Panel Integrated Variable Speed Heat Pumps	Integrated Systems	X	X	X	X
	Remote Retro-Commissioning (RRCx) Study	Operational Performance	X	-	-	-

Table 5: TDR Projects Benefiting DAC and HTR Customers

Project Name	Status
Advanced Multifamily EV Load Management System	Completed
Aerosol Sealing of Existing Attics and Crawlspace	Completed
California Multifamily Split HPWH Market Study	Completed
Field Demonstration of Atmospheric Storage Central Heat Pump Water Heater	Completed
Hybrid Heat Pump and Indirect Evaporative Cooling Packaged Unit	Completed

Project Name	Status
Market Potential for Heat Pump Assisted Hot Water Systems in Food Service Facilities	Completed
Mobile and Manufactured Housing Market Characterization Study	Completed
Residential Multi-Function Heat Pump: Laboratory Testing	Completed
Residential Multi-Function Heat Pumps: Heat Exchanger Improvement	Completed
Residential Multi-Function Heat Pumps: Project Search	Completed
Solar Assisted HVAC Market Study	Completed

Table 6: TSR Projects Benefiting DAC and HTR Customers

Project Name	Status
120V Induction Stoves with Battery Back-Up	Completed
All-Electric Commercial Kitchen Electrical Requirements Study	Completed
Central Heat Pump Water Heating Control Optimization	Completed
CO2 Chiller for Agricultural Sector	In-Progress
Comfort Impacts of Partial Coverage ASHPs	In-Progress
Commercial and MF CO2 based Heat Pump Water Heater Field Demonstration	Completed
Commercial Kitchen Hot Water System Design Guide	Completed
Compressed Air End-Use Air Management System	In-Progress
DAC HTR Statewide SF Housing Characteristics Study	Completed
Double Duct Packaged Terminal Heat Pump Field Demonstration	In-Progress

Project Name	Status
Electric Infrastructure Upgrades Alternatives Study for Manufactured Housing	In-Progress
Emergency Replacement Heat Pump Water Heater Market Study	Completed
Enhanced Normalized Metered Energy Consumption Analysis with Rapid Interventions	In-Progress
Field Demonstration of Mobile Home Electrification	In-Progress
Harvesting Mid-size Industrial BRO Savings	In-Progress
HVAC Capacity Controller	Completed
HVAC Thermal Energy Storage System (TESS)	Completed
Increasing Heat Pump Water Heater Deployment	Completed
Integrated HVAC RTU Remote Monitoring Systems	In-Progress
Low-Income Multifamily Housing Characteristics Study	Completed
Market Study of Household Electric Infrastructure Upgrade Alternatives for Electrification	Completed
Master Mixing Valve Field Study	Completed
Multifamily In-Unit Heat Pumps	Completed
Overcoming Key Barriers to Electrification of Foodservice Hot Water in California	In-Progress
Packaged Central CO2 Heat Pump Water Heater Multifamily Demonstration	In-Progress
Refrigeration Capacity Load Matching	In-Progress
Residential Housing Characteristics Study	Completed
Restaurant Field Monitoring	In-Progress
Return-to-primary Central HPWH System Field Demonstration	In-Progress

Project Name	Status
Variable Refrigerant Flow (VRF) Refrigerant Management Market Assessment	Completed
Wastewater Treatment SB1383 Compliance Characterization	Completed

Table 5 and 6 above include the projects from the program lifetime, broken down between TDR and TSR, that have been identified as benefiting DAC and HTR customers.

The goal of publishing this report is to provide transparency into the CalNEXT portfolio and summarize the program’s key focus areas. Future quarterly reports will be updated to show the progress being made from quarter to quarter. Updates to TPMs or the program priorities and future requests for information will be published on the [CalNEXT website](#).