



Quarterly Technology Area Report (Q4 2025)



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Portfolio Information

A summary of the number of project submissions the program has received between October and December 2025 (Q4), 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 latest TPMs, published this year, were applied to Q4 CalNEXT project submissions. During Q4, the team received 63 new project submissions.

Table 1: Project Submission Status Summary by Technology Area

	Q4 vs Cumulative (C)	Number of Projects at Project Stage					Projects Deferred*	Project Submissions
		Completed	Reporting	Implementation	Project Planning	Scanning & Screening		
Whole Building	Q4	3	4	1	5	1	0	17
	C	25	4	4	6	1	0	114
HVAC	Q4	2	0	0	3	0	0	12
	C	32	7	10	4	0	0	133
Water Heating	Q4	1	0	1	5	0	0	12
	C	16	2	8	5	0	2	70
Process Loads	Q4	3	1	1	5	1	0	12
	C	23	2	12	6	1	3	124
Lighting, Plug Loads and Appliances**	Q4	2	2	0	2	0	0	3
	C	6	2	4	5	0	0	50
Portfolio Enhancement	Q4	0	0	0	1	2	0	7
	C	0	0	3	4	2	0	17
Total	Q4	11	7	3	21	4	0	63
	C	102	17	41	30	4	5	508

*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.

Q4 Submissions by Submitter Type

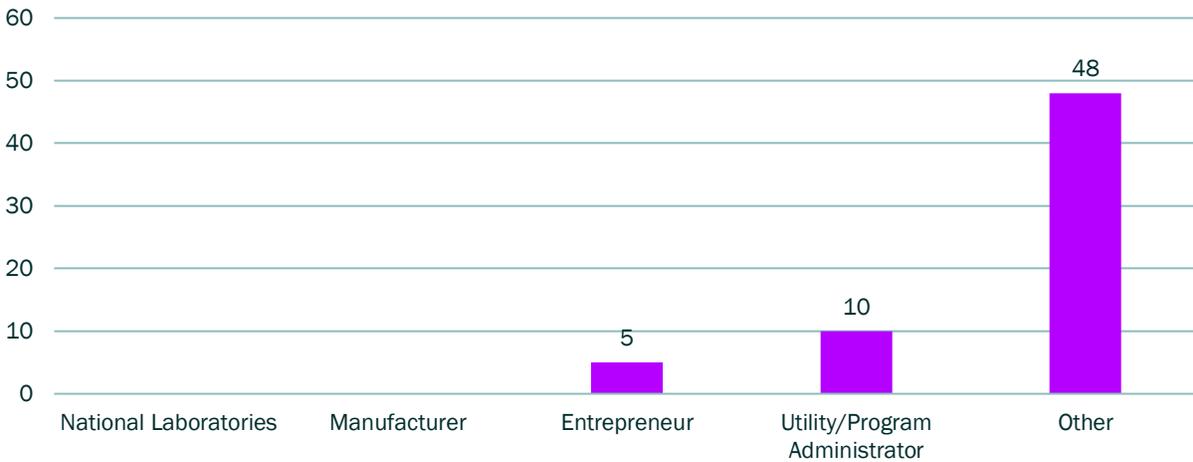


Figure 1: Program participant type

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 Q4 by Project Type²

Technology Area	Count of Projects by Project Type	
	TDR	TSR
Whole Building	1	4
HVAC	0	3
Water Heating	1	5
Process Loads	0	5
Lighting, Plug Loads & Appliances	1	1
Portfolio Enhancement	0	1
Total	3	19

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 20 TSRs and 9 TDRs in 2025.

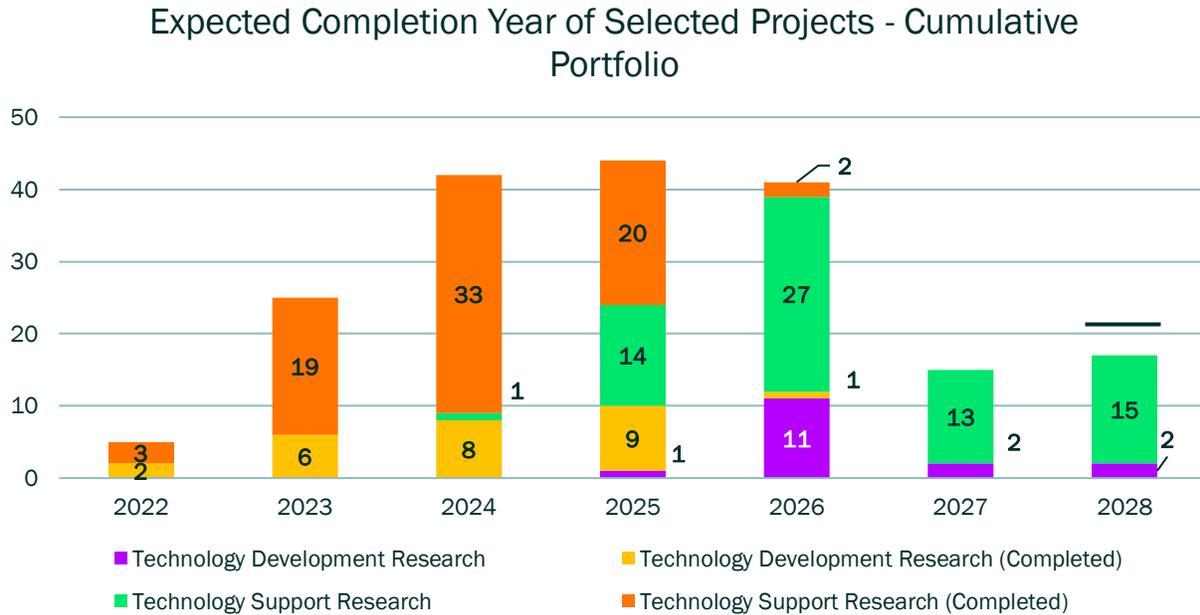


Figure 2: Selected project expected completion year (target number reflected as line)

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	10	9	90%
TSR	32	34	20	63%
Focused Pilot	3	1	1	33%
Total	45	45	30	67%

*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 Q4. 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: Q4 Selected Projects by TPM Subcategory and Attributes

TPM	Submission Name	TPM Subcategory	EE Benefit	DAC/HTR Benefit	Decarb Benefit	Load Shifting
HVAC	Heat Recovery Chiller Measure Development	Commercial Hydronic Heat Pumps	X	-	-	-
	Open-Source HVAC Decarbonization Web Tool	Commercial Hydronic Heat Pumps	X	-	X	X
	Profile for Heat Pump Cleaning Measure	Residential Air-to-Air HPs and Controls	X	X	-	-
Lighting, Plug Loads and Appliances	Intelligent Occupant-dependent Lighting PPL Management	Lighting & Plug Load Control Integration	X	X	X	X
	Leveraging non-energy benefits to promote 120V induction stoves	Decarbonizing Household Appliances	X	X	X	-
Portfolio Enhancement	Embodied Carbon in Cooling Design	Embodied Carbon	-	-	X	-
Process Loads	Edge Data Center Smart Retrofit	Data Centers & Enterprise Computing	X	X	X	X
	Industrial Heat Pump Opportunities for Food Processing	Refrigeration, Commercial & Industrial	X	X	-	-

TPM	Submission Name	TPM Subcategory	EE Benefit	DAC/HTR Benefit	Decarb Benefit	Load Shifting
Process Loads	Measure Development HVAC Pump Motors	Advanced Motors	X	-	-	-
	Optimizing Data Center Efficiency with AI-Enabled Orchestration	Data Centers and Enterprise Computing	X	-	-	-
	Packaged Propane Refrigeration Pilot	Refrigeration, Commercial & Industrial	X	X	X	-
Water Heating	Distributed PCM TESS Field Demonstration	Commercial Domestic Hot Water System Design	X	X	X	X
	HPWH for comfort cooling (resubmission)	Residential Multifunction Heat Pumps	X	X	-	-
	Market Characterization of Hot Water As a Service for Central HPWHs	Commercial Multifunction/Combination AWHPs	X	X	-	-
	Modeling Distributed PCM CHPWH Systems	Commercial Domestic Hot Water System Design	X	-	-	X
	Packaged CHPWH with PCM Storage	Commercial Domestic Hot Water System Design	X	X	-	-
	Parallel HPWH Temperature Maintenance (resubmission)	Commercial Domestic Hot Water System Design	X	X	-	-
Whole Buildings	AI-driven HVAC & Lighting Integration	Integrated Systems	X	-	-	-
	Commercially Available Multi-Function Heat Pump Lab Test	Integrated Systems	X	X	-	X

TPM	Submission Name	TPM Subcategory	EE Benefit	DAC/HTR Benefit	Decarb Benefit	Load Shifting
Whole Buildings	New Manufactured Home Quick Check	Design & Construction	X	X	-	-
	Service Upsizing Alternative Technology	Electrical Infrastructure Family	X	X	X	-
	Smart Panel-DER Gateway Interoperability Laboratory Assessment	Electrical Infrastructure Family	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
Field Demonstration of Atmospheric Storage Central Heat Pump Water Heater	In-Progress
Hybrid Heat Pump and Indirect Evaporative Cooling Packaged Unit	Completed
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

Project Name	Status
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
Comfort Impacts of Partial Coverage ASHPs	Completed
Commercial and MF CO2 based Heat Pump Water Heater Field Demonstration	Completed
Commercial Kitchen Hot Water System Design Guide	Completed
Commercially Available Multi-Function Heat Pump Lab Test	In-Progress
Compressed Air End-Use Air Management System	Completed
DAC HTR Statewide SF Housing Characteristics Study	Completed
Distributed PCM TESS Field Demonstration	In-Progress
Double Duct Packaged Terminal Heat Pump Field Demonstration	In-Progress
Edge Data Center Smart Retrofit	In-Progress
Emergency Replacement Heat Pump Water Heater Market Study	Completed
Enhanced Normalized Metered Energy Consumption Analysis with Rapid Interventions	In-Progress
HPWH for comfort cooling	In-Progress
HVAC Capacity Controller	Completed

Project Name	Status
HVAC Thermal Energy Storage System (TESS)	Completed
Increasing Heat Pump Water Heater Deployment	Completed
Industrial Heat Pump Opportunities for Food Processing	In-Progress
Integrated HVAC RTU Remote Monitoring Systems	In-Progress
Leveraging non-energy benefits to promote 120V induction stoves	In-Progress
Low-Income Multifamily Housing Characteristics Study	Completed
Market Characterization of Hot Water As a Service for Central HPWHs	In-Progress
Market Study of Household Electric Infrastructure Upgrade Alternatives for Electrification	Completed
Master Mixing Valve Field Study	Completed
Multifamily In-Unit Heat Pumps	Completed
New Manufactured Home Quick Check	In-Progress
Overcoming Key Barriers to Electrification of Foodservice Hot Water in California	In-Progress
Packaged Central CO2 Heat Pump Water Heater Multifamily Demonstration	In-Progress
Packaged CHPWH with PCM Storage	In-Progress
Packaged Propane Refrigeration Pilot	In-Progress
Parallel HPWH Temperature Maintenance	In-Progress
Profile for Heat Pump Cleaning Measure	In-Progress
Refrigeration Capacity Load Matching	Completed
Residential Housing Characteristics Study	Completed
Restaurant Field Monitoring	In-Progress

Project Name	Status
Return-to-primary Central HPWH System Field Demonstration	In-Progress
Service Upsizing Alternative Technology	In-Progress
Smart Controls for Data-Driven Indoor Agriculture Field Evaluation	Completed
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](#).