

CalNEXT's Role Bringing Technologies to California's Customers

Innovation Nexus

August 26, 2026

AGENDA

- 1** CalNEXT's Vision
- 2** CalNEXT's Role
- 3** CalNEXT's Impact
- 4** CalNEXT's Future

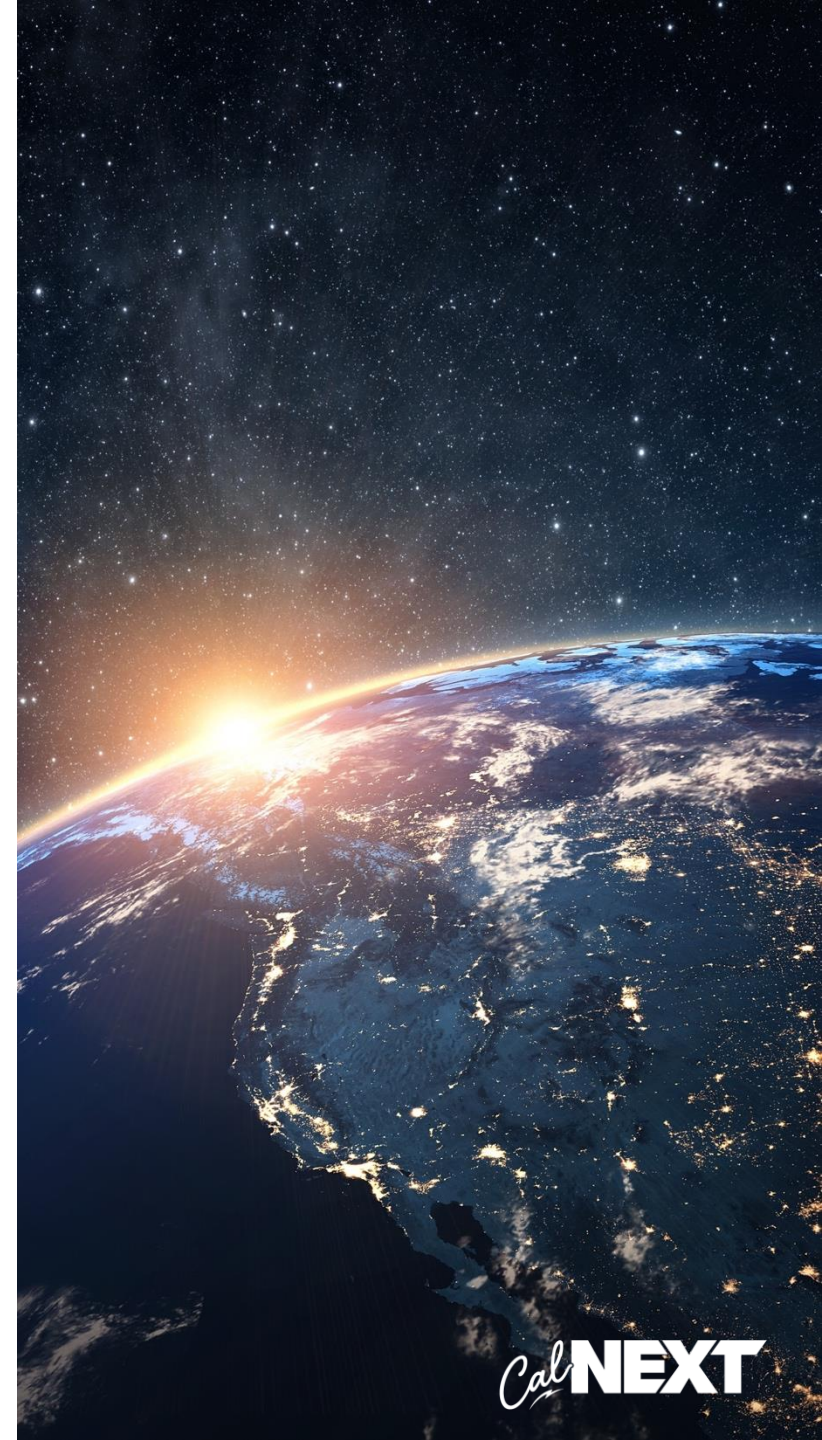
CalNEXT's Vision

**Bringing California closer to
a decarbonized future.**

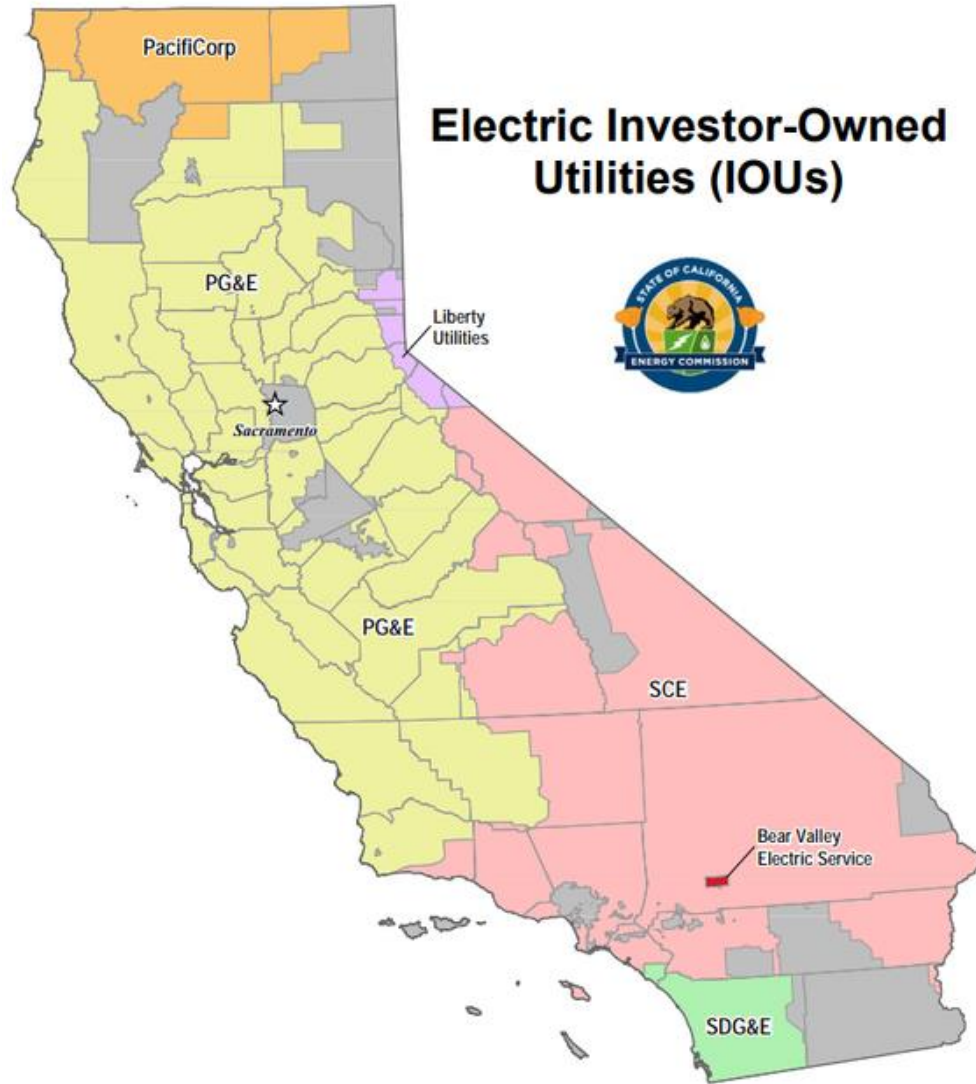
CalNEXT's Vision & Partners

CalNEXT's vision is to identify emerging technology trends and bring commercially available technologies to the energy efficiency program portfolio.

We do so as a diverse and experienced team:



CalNEXT's Coverage Area



CalNEXT is the Statewide Electric Emerging Technologies Program serving California's three Investor-Owned Utilities (IOUs) of 24.2 million electric customers

- Pacific Gas and Electric (PG&E)
- Southern California Edison (SCE)
- San Diego Gas & Electric (SDG&E)

CalNEXT Technology Areas

Technology Priority Maps (TPMs) highlight CalNEXT's research priorities across six technology categories and about 40 technology families. The TPMs are reviewed annually and represent new emerging policy, market or product trends based on interviews with ET stakeholders.



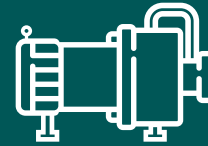
HVAC



Lighting,
Plug Loads
& Appliances



Portfolio
Enhancements



Process
Loads

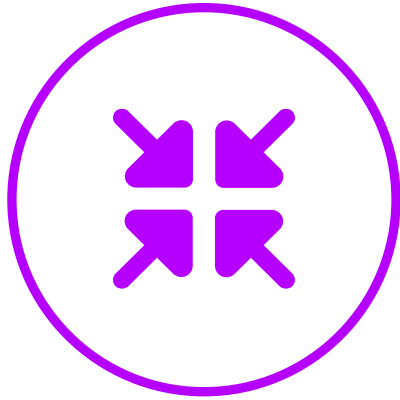


Water
Heating

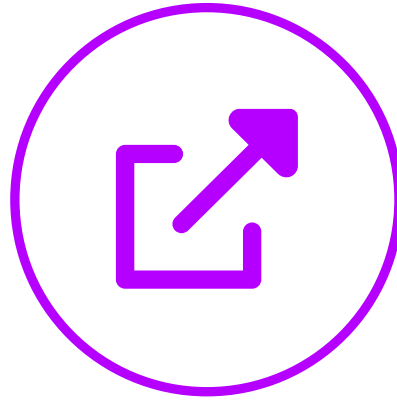


Whole
Buildings

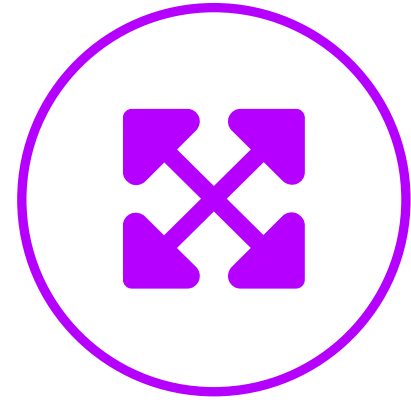
CalNEXT Project Types



Technology
Development
Research



Technology Support
Research

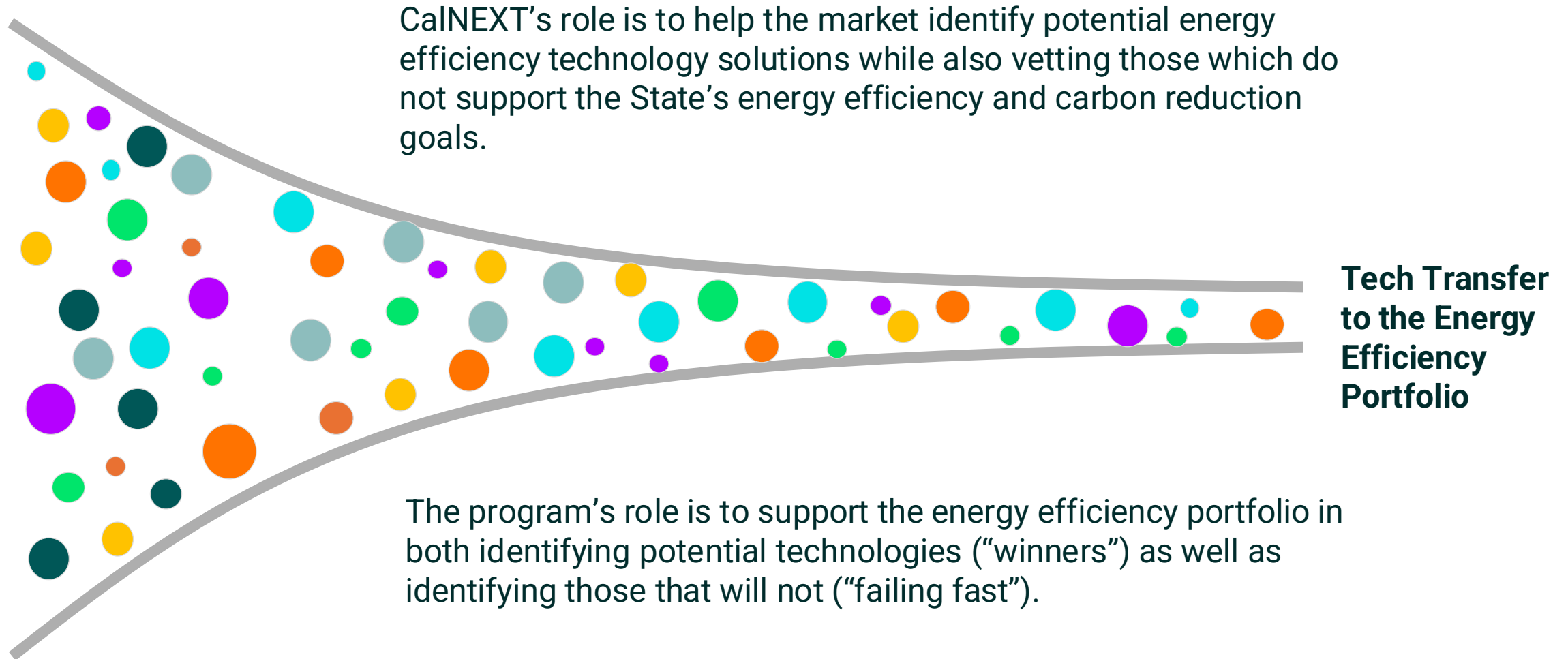


Focused Pilots

CalNEXT's Role

CalNEXT's Role

Evolution from Solicitation to Curation



CalNEXT's Comparison to CalMTA

	Market Support (CalNEXT)	Market Transformation (CalMTA)
Time Horizon	Short to medium term (1-3 years)	Long term (5-15+ years)
Key Objectives	Support near-term energy savings by promoting adoption of existing, proven energy-efficient technologies and practices.	Drive long-term, systemic market change to make energy-efficient products and practices the market norm.
Energy Savings Focus	Immediate, measurable savings from current technologies	Persistent, scalable savings through structural market shifts
Market Interventions	Technology research, testing, field/lab studies, market characterization studies, tool development	Coordinated interventions across supply chains, financing mechanisms, policy advocacy, and technology standardization.
Code Support	May inform future codes indirectly through data and adoption trends	Often explicitly designed to influence and accelerate updates to building and appliance codes and standards.

CalNEXT's Coordinating Role

As the statewide electric emerging technologies program, we collaborate with supporting groups including:

CPUC

CEC

CARB

IOUs

GET

DRET

CA-
ETP.com

ETCC

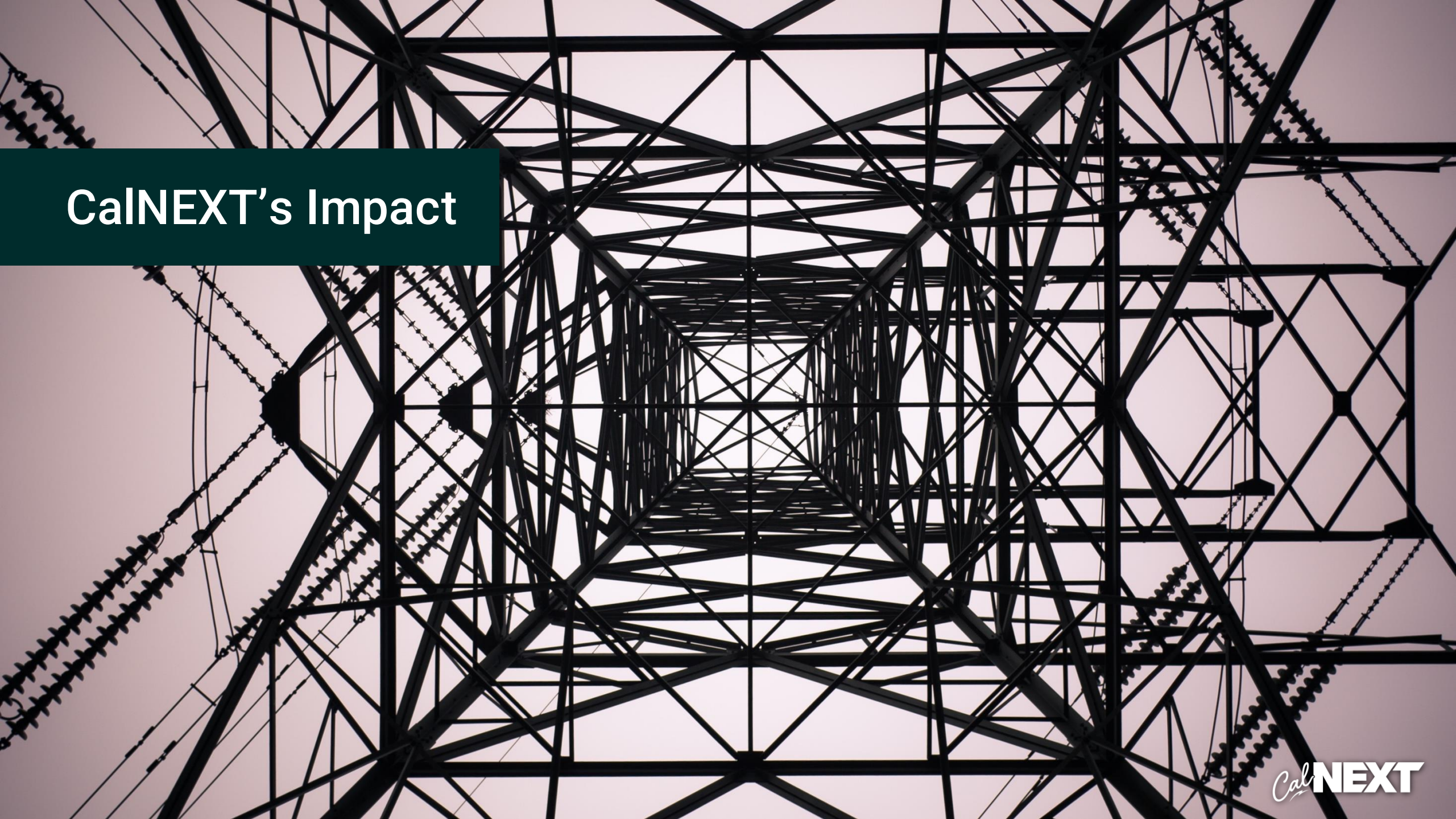
CalMTA

Cal TF

Code
Readiness

CAEECC





CalNEXT's Impact

CalNEXT's Impact

Limited examples



Heat Pump Research

Product searches; program barriers and opportunities studies; residential, commercial and industrial market studies; residential heat pump financing solutions analyses



Electrification Enablement Studies

All-electric Commercial Kitchen Electrical requirements study; Manufactured Housing Electrification Measure Development; Residential Electrical Service Upgrade Decision tool; 120v Induction Stoves with Battery Back-up



Disadvantaged Communities/Hard-to-Reach

DAC HTR Statewide Single-Family Housing Characteristics Study



Measure Packages

Commercial High-Efficiency Windows measure package completion; Residential High-Efficiency Windows measure package completion



Market and Field Studies

Various market studies on air-to-water heat pumps, variable refrigerant flow, industrial heat pumps, water-cooled chillers; various field studies on refrigerated display cases air curtain guiding vanes; Medical Devices Market Characterization Study



Tools

Various tools developed to support refrigeration analysis, industrial heat pumps

CalNEXT's Tech Transfer Examples

CalNEXT Projects Result in New Commercial High-Efficiency Windows Measure Package



CalNEXT Results in New Residential High-Efficiency Windows Measure Package



How Cost Optimized Reset Transforms HVAC Performance in Commercial Buildings



Oakland Church Answers the Call for Climate Action with Heat Pump Water Heaters



Measure Memo



Breaking Down Barriers: How to Get Heat Pump Water Heaters into California's Commercial Buildings



CalNEXT's Future



ETP Timeline

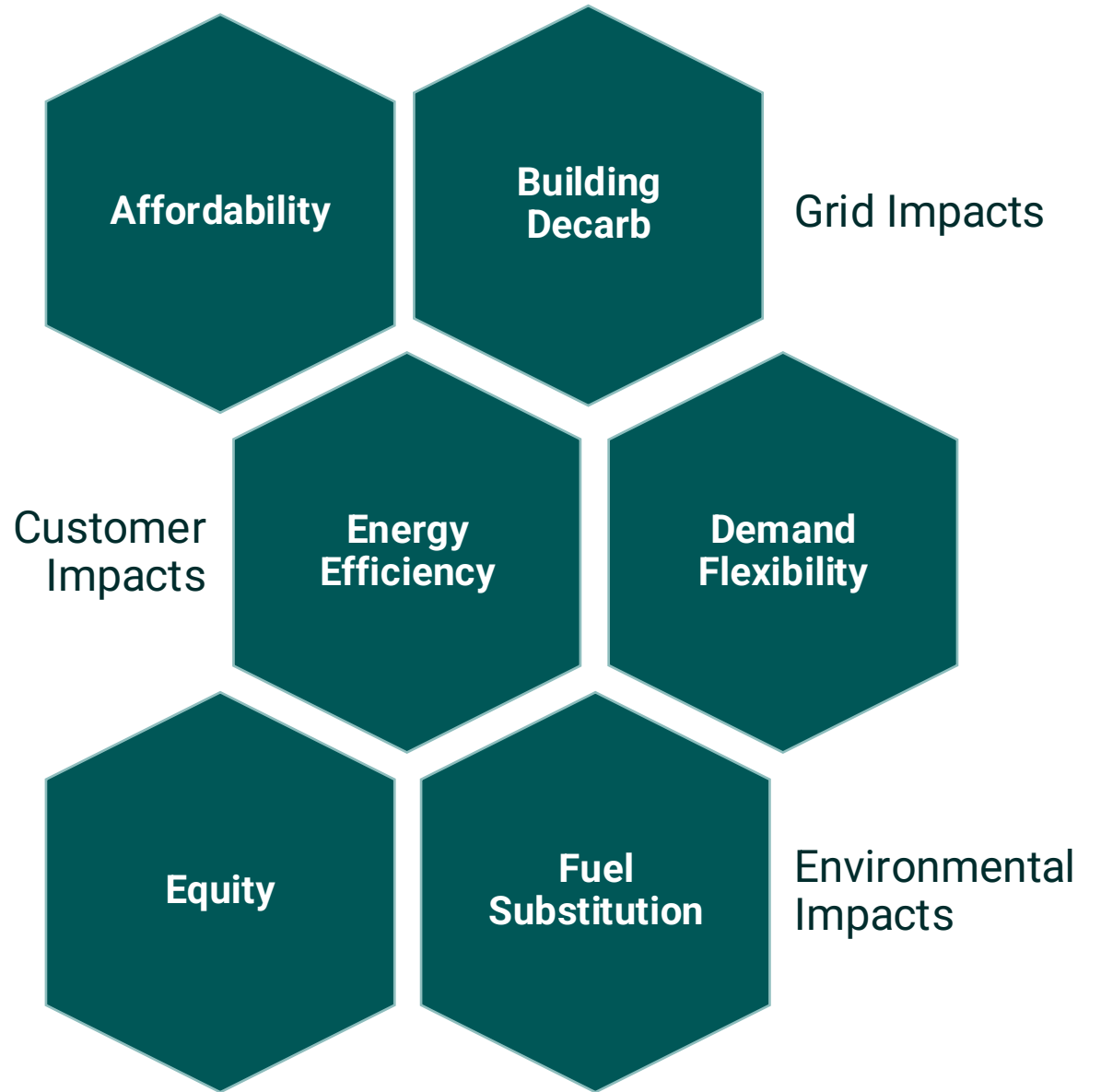


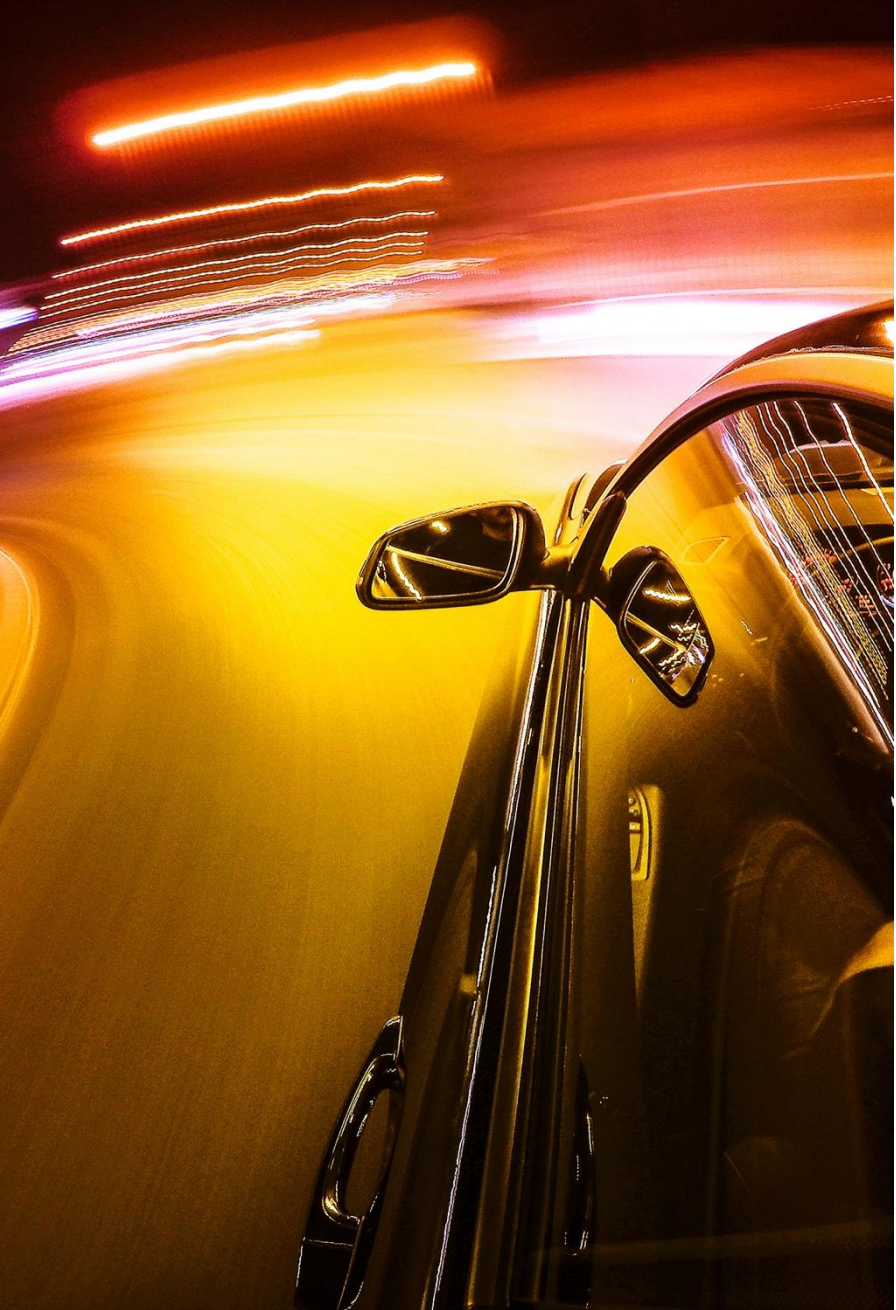
CalNEXT's Future

Evolution from Solicitation to Curation

Energy efficiency will continue to be the focus of CalNEXT, however, other policy priorities are also important to support:

- Equity and Affordability
- Demand flexibility and Building Decarbonization
- Fuel Substitution





Driving the Future of Energy Efficiency Together

- Emerging technologies will continue to be an important driver for how we optimize energy use
- Energy efficiency continues to be the lowest cost, most resilient grid resource to engage customers and market actors while achieving the state's carbon reduction goals
- Our call to action is clear:
 - For utilities to continue support for emerging technology programs
 - For implementers to cost-effectively deliver on energy efficiency program savings
 - For customers to participate in energy efficiency programs



Thank You!

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Cal **NEXT**