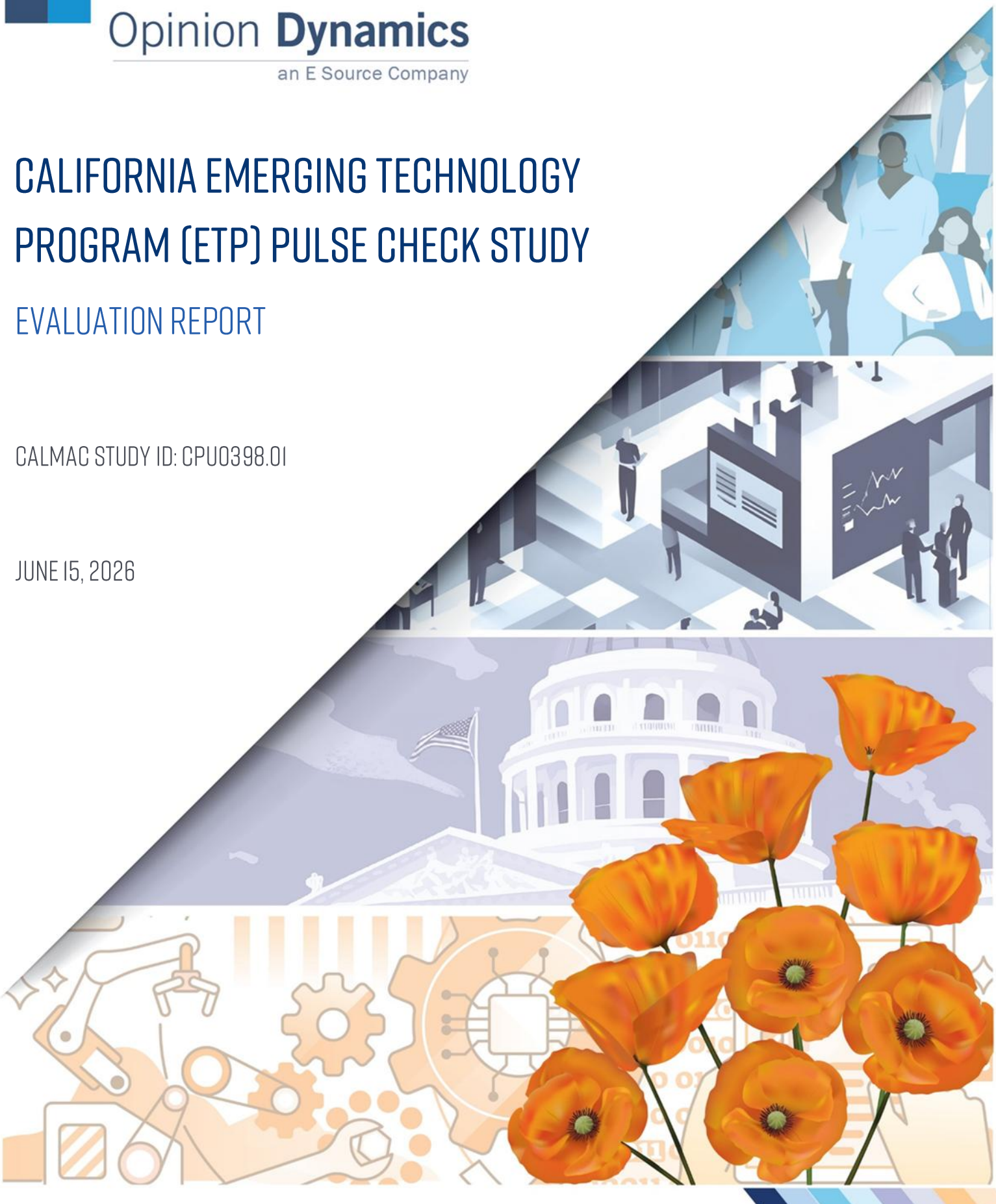
Opinion Dynamics
an E Source Company

CALIFORNIA EMERGING TECHNOLOGY PROGRAM (ETP) PULSE CHECK STUDY

EVALUATION REPORT

CALMAC STUDY ID: CPU0398.01

JUNE 15, 2026



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I. EXECUTIVE SUMMARY

This report presents findings of the Emerging Technology Program (ETP) Pulse Check Study.[1] The ETP is a Market Support program designed to advance energy efficiency goals set forth by the California Public Utilities Commission (CPUC).[2] It serves as a pipeline to identify, vet, and facilitate the transfer of innovative measures for adoption into the energy efficiency portfolio, supporting the market's continuously evolving needs. As part of its transition to third-party (3P) implementation, the historical ETP became a statewide (SW) initiative that comprises two fuel-specific programs: the electric ETP (i.e., CalNEXT), which relaunched as a SW 3P program in 2022; and the Gas Emerging Technology Program (i.e., GET), which relaunched as a SW 3P program in 2021. CalNEXT is administered by Southern California Edison (SCE) and implemented by Energy Solutions, while GET is administered by Southern California Gas Company (SoCalGas) and implemented by ICF. The ETP operates on a four-year budget of $85.1 million for the 2024-2027 cycle (13% of total for the Market Support segment), and spending through 2024 amounts to $17.8 million for CalNEXT and $3.8 million for GET.[3]

In 2024, Opinion Dynamics evaluated the re-launched 3P-implemented ETP and recommended actions to improve its future evaluability and implementation effectiveness in the 2024 ETP Process and Effectiveness Evaluation Report.[4] This ETP Pulse Check Study follows up on the prior evaluation to assess the degree to which implementation, coordination, and data-tracking processes have adopted evaluation recommendations or otherwise changed since 2024 and further explore opportunities to streamline key program processes and improve evaluability.[5]

Both CalNEXT and GET follow a similar overarching program process, as illustrated in Figure 1. Over the course of each year, program staff lead iterative updates to Technology Priority Maps (TPMs) that outline prioritized technologies and guide project development. Various organizations develop project ideas and plans for submission, which program staff or their designated partners then review and score before providing feedback or approval. Project teams determined as part of the planning process then implement approved projects, report on project outcomes, and disseminate findings to key stakeholders to inform technology transfer into the energy efficiency portfolio.

Figure 1. Key Phases of ETP Delivery

[1] A pulse check study refers to a targeted follow-up evaluation meant to gauge ongoing progress toward improving specific program implementation elements or processes.

[2] Decision 21-05-031 states market support programs have a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building partnerships, or moving beneficial technologies towards greater cost-effectiveness.

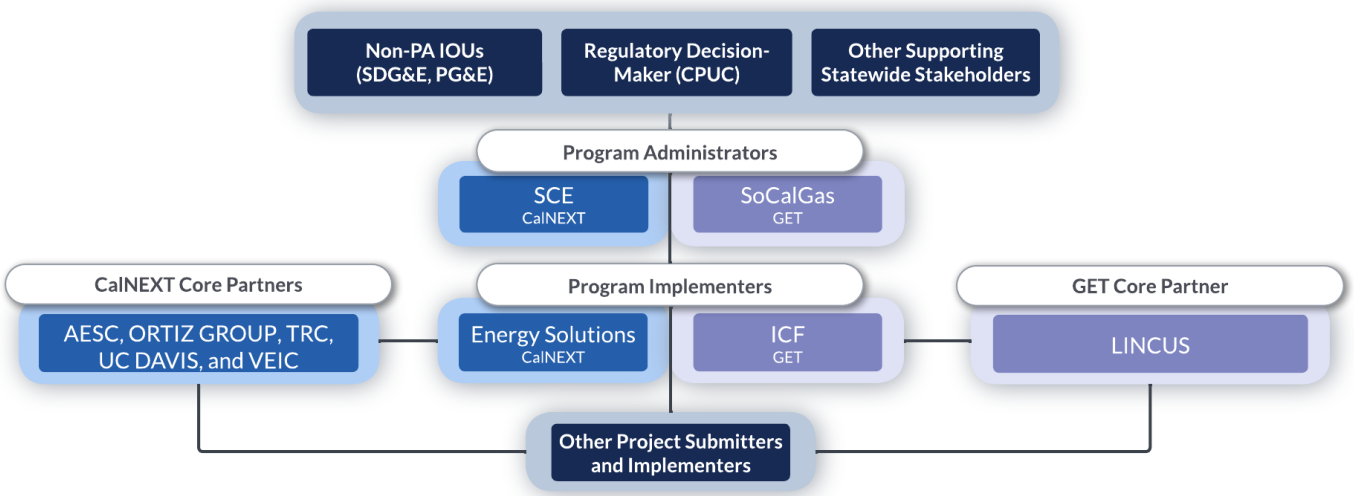
[3] Latest available actual spend from CEDARS database is reported annually through the 2024 calendar year (accessed November 2025).

[4] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Prepared by Opinion Dynamics. Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view.

[5] Note, 2024 recommendations did not undergo a formal response-to-recommendations process and were therefore not necessarily addressed or required for integration by ETP PAs and implementation teams.

Figure 2 illustrates the key parties that contribute to and engage with the ETP. Program implementers sit at the center of program operations, coordinating closely between PAs, core partners, and other project submitters and stakeholders to facilitate each phase of program delivery. PAs are responsible for administering implementation contracts and monitoring and supporting third-party implementer efforts on an ongoing basis. Core partners play varied roles as subcontractors to program implementers, often executing specific core implementation support functions (e.g., project scanning/scoring, TPM updates) while also serving as subject matter experts (SMEs) and engaging as project submitters/implementers. Program implementers and project teams are responsible for engaging with specific stakeholders at designated stages of each phase of implementation. Section 4.1 provides an overview of the various organizations involved and their specific roles and responsibilities.

Figure 2. Key Parties Involved in ETP Delivery



Since the start of the current 2024-2027 program cycle, both CalNEXT and GET completed projects covering a range of technology areas, including a total of 88 CalNEXT projects[6] and 10 GET projects[7] completed in 2024 and 2025. For each program, technology areas shown here are defined by the respective programs' TPMs. Table 1 summarizes the count of projects completed by program and technology area.

Table 1. Summary of Recently Completed ETP Projects (2024/2025)

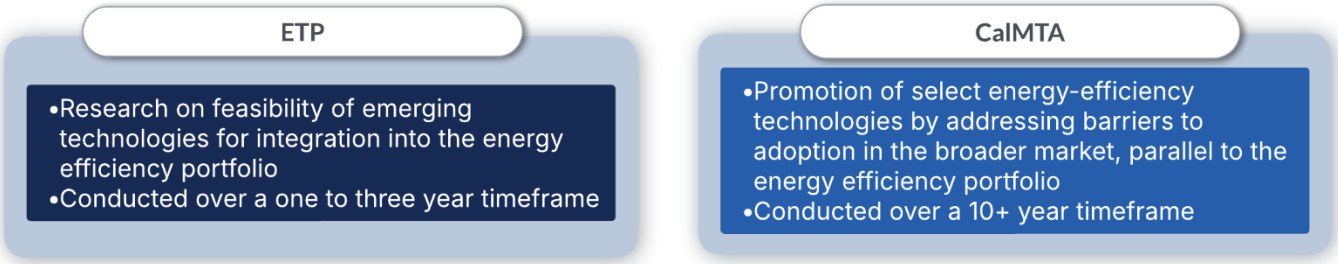
Technology Area	CalNEXT	GET
HVAC	31	2
Water Heating	18	12
Whole Building	25	3
Process Loads	21	8
Lighting, Plug Loads & Appliances	8	3
Commercial Food Service	0	2
Miscellaneous	0	1
Total[a]	**88**	**21**

[a] Totals do not reflect the sum of values shown because some projects are affiliated with multiple technology areas.

[6] https://calnext.com/approved-projects/
[7] https://cagastech.com/iget/projects

In parallel with the ETP and the CPUC's energy efficiency portfolio, the California Market Transformation Administrator (CalMTA) is responsible for developing and managing Market Transformation Initiatives (MTIs) in the state to reduce energy use and greenhouse gas emissions.[8] Decision 19-12-021 established CalMTA as a statewide, 3P-implemented program focused on long-term market transformation by accelerating the adoption of energy-efficient technologies and practices.[9] Figure 3 outlines the primary differences in scope between ETP and CalMTA efforts.

Figure 3. Key Distinctions Between ETP and CalMTA Offerings



I.I RESEARCH OBJECTIVES AND APPROACH

This study's overarching objectives aim to optimize the energy efficiency portfolio and manage risk, ensuring the ETP is streamlined to maximize the value of ratepayer dollars. Table 2 outlines the research objectives and activities.

Table 2. Research Objectives Targeted by Activity

Research Objective	Data and Material Review	Program Staff Interviews	Stakeholder Interviews
Assess ETP implementation changes since the most recent ETP evaluation, including actions in response to recommendations regarding program evaluability, data tracking, and monitoring of key metrics.	✓	✓	✓
Document current ETP processes for technology prioritization, scanning, and screening, as well as technology transfer of ETP projects to energy efficiency measures and information dissemination to stakeholders.		✓	✓
Characterize the level of coordination and alignment between ETP and CalMTA to identify potential overlap and minimize risk of double-spending across the two offerings.		✓	✓
Understand the public input process for ETP projects and how stakeholders and project submitters can be most effectively engaged.		✓	✓
Gauge alignment of ETP activities and technology priorities with CPUC decarbonization and energy efficiency policy objectives and highlight opportunities to better align implementation with CPUC objectives.	✓	✓	

The 2024 ETP Process and Effectiveness Evaluation Report included the following evaluation recommendations (synthesized here for conciseness), which informed the current evaluation's efforts to assess implementation changes and document current processes: [10]

[8] California Market Transformation Administrator. (2025). https://calmta.org/

[9] California Public Utilities Commission. (December 2019). *Decision 19-12-021*. https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M321/K507/321507615.PDF

[10] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Prepared by Opinion Dynamics. Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view.

- Adopt evaluation-recommended updates to the program theory logic model (PTLM)[11] and associated key performance indicators (KPIs). Specifically, PAs should update program data collection and tracking practices to ensure all necessary data to measure the proposed KPIs are collected and tracked by program implementers. The PTLM and KPIs recommended by the 2024 evaluation are detailed in Appendix A.
- Coordinate an effort to establish targets for proposed KPIs, consulting with the CPUC as needed and revisiting targets on a regular interval to ensure they remain viable for future years.
- Define "commercialization" in the context of existing ETP performance metrics and indicators that refer to technologies which are five years from commercialization.
- Revise project plan templates to include detailed instructions regarding necessary levels of rigor for experiments
- Consider including parties that may contribute to eventual technology transfer and integration (e.g., CalTF measure committee, evaluators) in development of project plans.[12]
- Explore opportunities to shorten project review timelines and set transparent targets for timing of project plan scanning and scoring.
- Develop a responsibility assignment matrix for each party and task involved in program implementation to inform specific roles and data sharing needs among relevant contributors.
- Program implementers and PAs should work together to collectively define the extent to which program staff are responsible for technology transfer activities.

I.2 EVALUATION INSIGHTS

The current ETP Pulse Check Study builds on a comprehensive process evaluation conducted in 2024, which recommended an updated PTLM and associated KPIs meant to help demonstrate program performance, as well as several other opportunities for process improvements. The current study aims to assess the degree to which ETP program staff adopted 2024 recommendations or otherwise altered implementation processes with an emphasis on tracking and reporting of program performance, navigating potential overlap with CalMTA, and soliciting public and external submitter contributions. Notably, although ETP PAs initially provided feedback on the draft evaluation report, a formal response-to-recommendations process was never initiated.

Despite not conducting formal responses to recommendations, the CalNEXT and GET program teams facilitated several updates to implementation processes since the prior evaluation, several of which are well-aligned with 2024 evaluation recommendations. While neither program team made substantive changes to KPI or metric tracking efforts, both demonstrated their ability to report on most of the PTLM-based KPIs upon evaluator request. Other programmatic updates included CalNEXT's development of a new technology transfer framework, continued revisions to both programs' TPMs, additional touchpoints to better support external project submitters, and other ongoing adjustments to project team structures and communication processes. The CalNEXT team also began coordinating with CalMTA staff on an ongoing basis, meeting at least once a month to collaborate around shared goals and avoid duplication of efforts across the two programs. These positive developments leave both CalNEXT and GET well-equipped to continue building on existing processes for performance metric tracking and practices to help drive projects towards technology transfer activities in support of the energy efficiency portfolio.

[11] Program theory and logic models (PTLMs) are diagrams that visually represent the theories of change including the activities planned, the outputs expected, and how these are tied to desired short-, medium-, and long-term outcomes.

[12] This may include targeted engagement to solicit input on specific research components or measure package considerations, rather than to inform technology selection or project approval.

I.3 CONCLUSIONS AND RECOMMENDATIONS

Based on the study findings, we offer the following conclusions and associated recommendations.

- **Conclusion: ETP tracking and reporting of program outcomes capture most but not all of the internal KPIs recommended by the 2024 evaluation.** Processes in place to track program outcomes remain largely unchanged since the original SW 3P contracts in 2021 and 2022, reflecting policy-defined metrics in place at the time. A series of policy decisions in recent years made several changes to ETP reporting requirements, while the 2024 ETP Process and Effectiveness Evaluation recommended newly established internal KPIs (which did not undergo a formal response-to-recommendations process or get incorporated into policy language).[13] Currently available data provided by each implementation team in Q3 2025 sufficiently tracks most but not all of the recommended KPIs for each program.
  - **Recommendation:** Begin comprehensively tracking and annually reporting all ETP indicators outlined by Resolution E-5351 using the specified Excel template and including links to programmatic information and data to adhere to latest applicable policy-defined reporting requirements.[14]
  - **Recommendation:** Adopt practices necessary to sufficiently track and report annually on all internal KPIs recommended by the 2024 evaluation (e.g., maintain consistent and regularly updated records of applicable activities, project categories, and project outcomes) to ensure both CalNEXT and GET can fully demonstrate their accomplishments and progress toward program theory-based objectives.[15] These metrics should be documented by program implementers and reviewed by PAs on an annual basis, allowing them to be shared externally upon request by evaluators or other relevant parties.
- **Conclusion: CalNEXT implemented efforts to formalize the technology transfer processes and define potential project outcomes that extend beyond direct transfer of technologies to the energy efficiency portfolio.** The updated technology transfer guidance framework is generally well-aligned with both the 2024 evaluation recommendations and input from program staff and stakeholders gathered as part of the current evaluation regarding the need for flexibility and expanded definitions of intended ETP project outcomes.
  - **Recommendation:** Highlight the newly developed technology transfer guidance to potential project submitters via the CalNEXT website and in future outreach efforts, emphasizing the importance of clearly defined expectations for technology transfer outcomes in the project proposal and planning phase, as outlined in the new framework.
  - **Recommendation:** Continue gathering feedback to further refine and clarify newly established technology transfer pathways by facilitating feedback-oriented discussions as part of upcoming Energy Transition Coordinating Council (ETCC) Summits and meetings with closely engaged parties such as IOU staff and core partners. This topic may also represent a valuable focus area for future evaluation to determine the degree to which updated information reaches the intended audience and has the desired effect on project outcomes.
  - **Recommendation:** GET program staff should consider adopting or selectively incorporating technology transfer pathway definitions and associated project planning guidance established by the CalNEXT framework to help clarify anticipated technology transfer outcomes for both internal and external reference and further emphasize those outcomes in project planning.

[13] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Prepared by Opinion Dynamics. Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view.

[14] Resolution E-5351, passed in June 2025, established revised market support metrics and indicators and effectively converted most existing ETP metrics to indicators while removing a few others deemed unnecessary or misaligned with program-driven outputs. California Public Utilities Commission. (June 2025). *Resolution E-5351.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M569/ K136/569136233.pdf.

[15] Notably, project outcomes and technology transfer activities may not always be directly measurable or definitively tied to ETP research that helped inform them and may therefore be underrepresented by ongoing efforts to track eventual outcomes.

- **Conclusion: CalNEXT and GET implementation teams take differing approaches to soliciting project ideas from external submitters, yet both programs face similar challenges associated with transparency and clarity of expectations.** External submitters seeking to propose project ideas often pointed to challenges understanding expectations for new project proposals and expressed an interest in receiving more context, guidance, and communication during the early stages of proposal development and review.
  - **Recommendation:** Both CalNEXT and GET implementation teams should ensure potential project submitters have access to introductory information regarding key considerations, processes, and timelines involved in project planning and review, including clear and timely feedback and regular status updates or live tracking of pending proposals. CalNEXT staff should enhance and highlight existing information available on the program's website and incorporate additional details regarding review processes into existing guidance documentation. GET staff should prioritize proactive outreach via existing channels (e.g., newsletters, social media campaigns, industry events, and conferences) in concert with additions to the GET website and publicly available materials to help make more accessible and informative, thus encouraging project submissions organizations less familiar with program expectations.
- **Conclusion: CalMTA and the ETP represent closely related but distinct roles in the California energy efficiency market landscape.** By definition, the ETP focuses on end uses in earlier stages of development and market readiness, meaning CalMTA can directly benefit from ETP research to help understand the viability of those technologies for CalMTA initiatives. Additionally, a late 2025 policy decision highlighted the need for active coordination between energy efficiency programs and CalMTA in cases where potential overlap exists and defers to the energy efficiency portfolio on how to operationalize those processes.[16]
  - **Recommendation:** Close coordination between ETP and CalMTA can help improve information-sharing practices and establish more direct communication between ETP program teams and CalMTA staff. CalNEXT program staff should continue regularly meeting with CalMTA staff and establish a communication and data sharing plan that outlines responsibilities and expected timing for fulfilling CalMTA requests.
- **Conclusion: The Department of Energy (DOE) adoption readiness level (ARL) framework represents a valuable and well-established point of reference for operationalizing and defining commercialization.** The concept of commercialization is central to determining how individual technologies qualify for consideration within the ETP's framework and how they are captured in reported indicators and KPIs.
  - **Recommendation:** ETP program teams should consider incorporating the DOE ARL framework into the program's lexicon and project proposal and planning considerations, given it may serve as a valuable point of reference for program staff, stakeholders, and project submitters. While it is not necessary to systematically apply the full framework in every context, establishing a more explicit shared understanding of how to define commercialization can help inform ongoing project development and screening, as well as efforts to accurately track and report on ETP progress and outcomes.
- **Conclusion: Both CalNEXT and GET maintain close alignment of prioritized technologies with CPUC decarbonization and energy-efficiency policy objectives via regular updates to TPMs with input from IOUs and statewide stakeholders.** CalNEXT and GET implementation plans and TPMs highlight the importance of research that establishes feasibility for adoption into the energy efficiency portfolio, and projects often explicitly address reliability and affordability as key barriers and considerations for technologies' future potential.
  - **Recommendation:** Continue regularly updating TPMs and soliciting input from IOUs and statewide stakeholders to ensure priorities remain aligned with the latest needs of the energy efficiency portfolio.

[16] California Public Utilities Commission. (November 2025). *Decision 25-11-023*. https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M588/K645/588645495.PDF

2. INTRODUCTION AND OVERVIEW

The California Public Utilities Commission (CPUC) authorizes investor-owned utilities (IOUs) to fund a portfolio of customer programs encouraging the adoption of energy-efficient technologies. One pillar of the IOUs' energy efficiency portfolio is resource acquisition programs that offer rebates and incentives to customers who adopt high-efficiency technologies (referred to as measures).[17] The IOUs are continually seeking new, emerging technologies that can provide opportunities for energy savings to replace sunset measures and continue to support California's energy and demand savings targets. The Emerging Technology Program (ETP) is a Market Support program designed to identify, vet, and facilitate the transfer of innovative measures for adoption into the energy efficiency portfolio, supporting the market's continuously evolving needs.[18]

The IOUs have offered the ETP since 2002, and ETP projects have historically been shown to contribute to significant savings in the California energy efficiency portfolio, although the ETP itself does not claim ex ante savings and is not responsible for ensuring recommended measure packages are implemented by Resource Acquisition programs. The 2021 ETP Technology to Portfolio Evaluation found that between 2009 and 2017, the ETP contributed an average of 8% of annual portfolio kWh savings, 17% of kW savings (2016–2017 only), and 2% of therm savings (excluding codes and standards claims).[19] However, identifying reliable metrics to demonstrate the linkage between program activities and intended program outcomes has often presented a challenge. The actual adoption of technologies or strategies into programs is outside the control of ETP staff and contingent upon IOU program staff utilizing ETP-supported measures and strategies as they become available.

Since 2016, the CPUC has required program administrators (PAs) to shift program implementation responsibilities to third parties (3Ps). As part of this transition, the historical ETP became a statewide (SW) initiative that comprises two fuel-specific programs: the electric ETP (i.e., CalNEXT), which relaunched as a SW 3P program in 2022; and the Gas Emerging Technology Program (i.e., GET), which relaunched as a SW 3P program in 2021. CalNEXT is administered by Southern California Edison (SCE) and implemented by Energy Solutions, while GET is administered by Southern California Gas Company (SoCalGas) and implemented by ICF. The ETP operates on a four-year budget of $85.1 million for the 2024-2027 cycle (13% of total for the Market Support segment), and spending through 2024 amounts to $17.8 million for CalNEXT and $3.8 million for GET.[20]

[17] In 2021, Decision 21-05-031 required program administrators to segment their energy efficiency portfolios into programs whose primary purpose is resource acquisition, market support, or equity.

[18] Decision 21-05-031 states market support programs have a primary objective of supporting the long-term success of the energy efficiency market by educating customers, training contractors, building partnerships, or moving beneficial technologies towards greater cost-effectiveness.

[19] Emerging Technologies Program Technology to Portfolio Evaluation (2021). https://pda.energydataweb.com/api/view/2509/CPUC%20ETP-2%20Technology%20to%20Portfolio%20Report.pdf

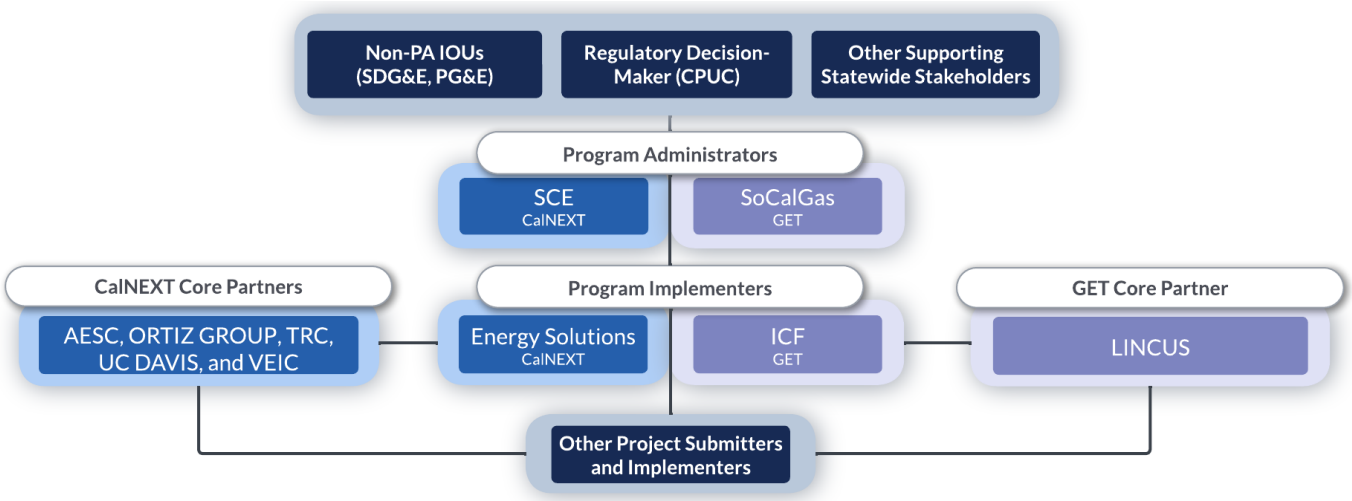
[20] Latest available actual spend from CEDARS database is reported annually through the 2024 calendar year (accessed November 2025).

Both CalNEXT and GET follow a similar overarching program process, as illustrated in Figure 1. Although the two programs follow comparable core stages of implementation, they often differ in their approach to individual steps and the parties involved. Implementation teams and their core partners develop Technology Priority Maps (TPMs), which outline prioritized technologies and end uses. TPMs then serve as a guide for selecting qualified projects. Program partners then implement selected projects in coordination with program staff. Following project implementation, program partners report on project outcomes and disseminate findings to key stakeholders. Ultimately, project reporting and dissemination are intended to inform technology transfer into the energy efficiency portfolio.

Figure 4. Key Phases of ETP Delivery

Figure 2 illustrates the various parties that contribute to and engage with the ETP. Program implementers coordinate closely between program administrators (PAs), core partners,[21] and other project submitters and implementers to facilitate each phase of program delivery, while PAs work closely with the CPUC, other investor-owned utilities (IOUs), and other statewide stakeholder organizations to solicit input and inform program processes. Core partners often serve as project submitters and implementers and can also play targeted, ongoing supporting roles, providing input as subject matter experts (SMEs) or assisting other 'external' project submitters that may have less direct program experience. Program implementers collaborate with various stakeholders and subcontractors to facilitate events and webinars, contribute to working groups, conferences, and summits, and circulate project deliverables to solicit public input and keep statewide stakeholders, IOUs, and the CPUC apprised of programmatic updates. Section 4.1 provides further detail on program processes and key parties involved.

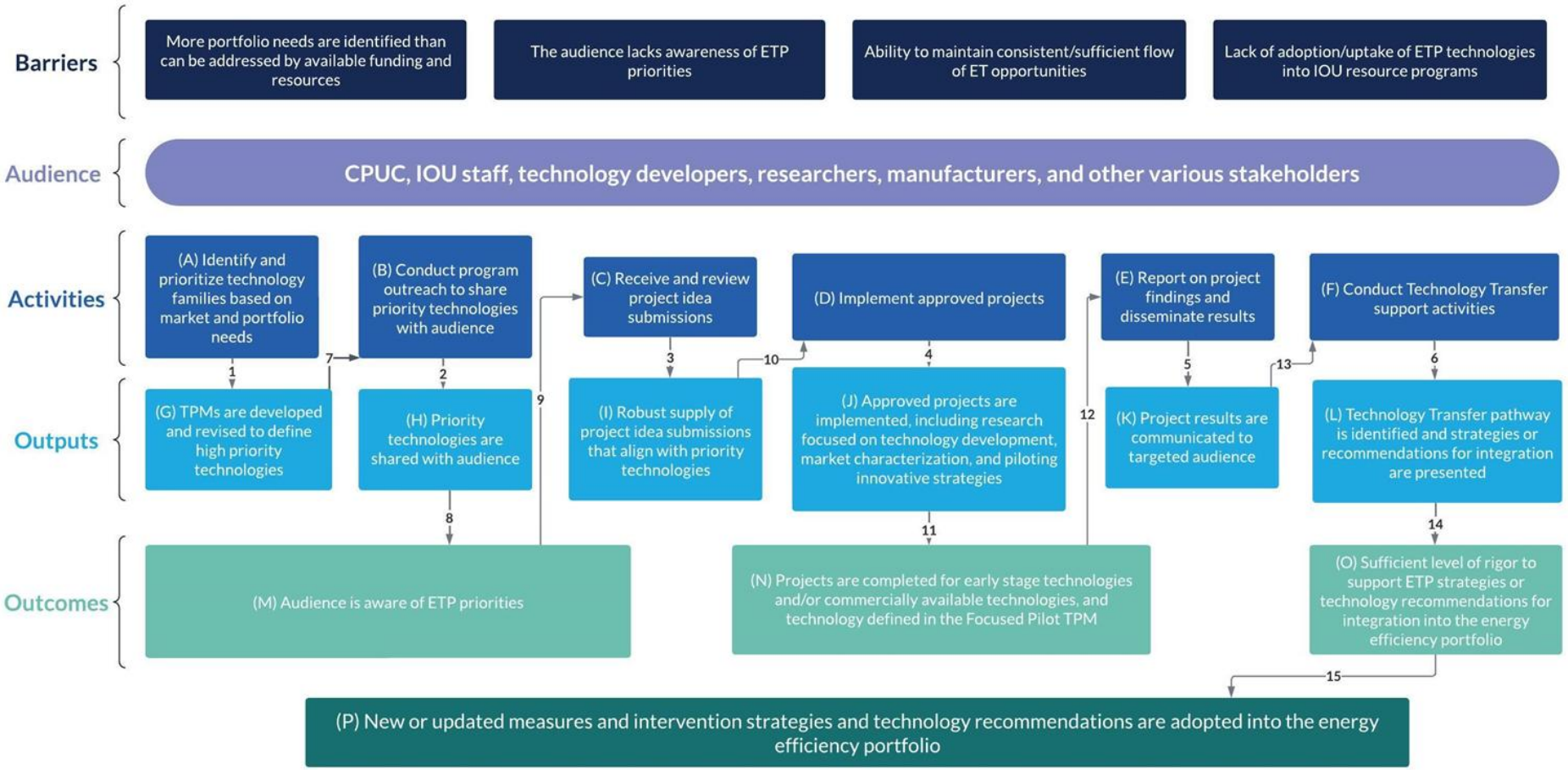
Figure 5. Key Parties Involved in ETP Delivery



[21] Core partners are contracted by program implementers to provide ongoing support of specific implementation functions.

In 2024, Opinion Dynamics evaluated the recently launched 3P ETP and recommended actions to improve future evaluability and implementation effectiveness.[22] The 2024 evaluation included development of a revised program theory logic model (PTLM) recognizing the unified core theory behind both CalNEXT and GET and establishing a refined the list of internal key performance indicators (KPIs) to demonstrate intended program theory-driven outcomes. Figure illustrates the PTLM established by the 2024 evaluation.

Figure 6. Statewide ETP PTLM from 2024 Evaluation



Note, numbered linkages are directly mapped to associated KPIs meant to demonstrate progress toward each intended output.

[22] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view

ETP projects address targeted data and research needs identified by program staff, core partners, and other program stakeholders for the energy efficiency portfolio. Projects aim to support the development of work papers or measure package updates to guide resource acquisition program managers on marketing strategies, incentive structures, and other program design elements. The central goal of the ETP is to identify and recommend effective emerging technologies and intervention strategies for integration into the energy efficiency portfolio to achieve savings.

In parallel with the ETP and the CPUC's energy efficiency portfolio, the California Market Transformation Administrator (CalMTA) is responsible for developing and managing Market Transformation Initiatives (MTIs) in the state to reduce energy use and greenhouse gas emissions.[23] Decision 19-12-021 established CalMTA as a statewide, 3P-implemented program focused on long-term market transformation by accelerating the adoption of energy-efficient technologies and practices.[24] While the ETP and CalMTA generally serve distinct roles and purposes in the energy efficiency market landscape, they sometimes engage with overlapping technologies.

2.1 RESEARCH OBJECTIVES

This study's overarching objectives serve to help optimize portfolio strategy and manage portfolio risk, ensuring the ETP is strategically aligned with portfolio-wide objectives and streamlined to maximize the value of ratepayer dollars. Specifically, the study addressed the following research objectives through data and material review, in-depth staff interviews, and in-depth stakeholder interviews:

- Assess ETP implementation changes since the most recent ETP evaluation, including actions in response to recommendations regarding program evaluability, data tracking, and monitoring of key metrics.[25]
- Document current ETP processes for technology prioritization, scanning, and screening, as well as technology transfer of ETP projects to energy efficiency measures and information dissemination to stakeholders.
- Characterize the level of coordination and alignment between ETP and CalMTA to identify potential overlap and minimize the risk of double-spending across the two offerings.[26]
- Understand the public input process for ETP projects and how stakeholders and project submitters can be most effectively engaged.
- Assess the alignment of ETP activities and technology priorities with CPUC decarbonization and energy efficiency policy objectives and highlight opportunities to better align implementation with CPUC objectives.

[23] https://calmta.org/

[24] https://calmta.org/wp-content/uploads/2025/04/321507615-2.pdf

[25] The most recent evaluation (delivered in 2024) assessed program evaluability, developed a refined program theory logic model, and evaluated a sample of projects, pilots, and technology priority maps, among other activities (note that as of July 2025, the ETP has not been formally directed respond to these recommendations). California ETP Process and Effectiveness Evaluation Report 2024 https://pda.energydataweb.com/#!/documents/4034/view

[26] The ETP is not currently required by policy guidance to coordinate with CalMTA. However, CalMTA is required (per Decision 19-12-021) to coordinate with existing energy efficiency portfolio programs, and ETP staff have demonstrated their willingness to coordinate with CalMTA as they do other key statewide stakeholders.

The ETP Pulse Check Study sought to address the topics and research questions indicated in Table 3.

Table 3. Research Topics, Questions, and Expected Outcomes

Research Topic	Research Questions
Optimize Program Value and Minimize Risk of Unnecessary Ratepayer Spending	▪ Are ETP staff taking appropriate action to improve data quality and program monitoring, overcome barriers to improving evaluability, and strengthen coordination and engagement with stakeholders? ▪ Are ETP and CalMTA staff and program designs effectively avoiding overlap between related activities? In what areas can the two programs benefit from improved coordination to eliminate any redundancies that may exist?
Public Impact	▪ Is the ETP sufficiently benefiting from public input on proposed projects and Technology-Focused Pilots (TFPs)? How can the program most effectively solicit public input to identify and promote emerging technology advancements?
Policy Alignment	▪ Does ETP align to the full extent possible with CPUC decarbonization and energy efficiency policy objectives? How can the program maximize its alignment with CPUC objectives?

3. METHODOLOGY

To address the study's research objectives, the evaluation team conducted a comprehensive review of program-related data and materials, followed by interviews with ETP program staff and various stakeholders, including CalMTA, core partners, and external project submitters. This section details each of the research activities conducted as part of the ETP Pulse Check Study.

3.1 DATA AND MATERIAL REVIEW

In July 2025, the evaluation team submitted a data request to CalNEXT and GET program staff for currently available KPIs and program materials, including implementation plans, TFP documentation, and other data and materials supporting program activities and associated indicators and metrics. The team reviewed these data and materials to assess the program's capacity to support future metrics assessments and alignment with recommendations from the 2024 ETP evaluation. We also conducted a detailed review of the latest Focused Pilot TPM and TFPs planned for launch in 2025, as well as MTIs currently in development by CalMTA and CalMTA-CalNEXT Collaboration Quarterly Reports to document alignment of technology priorities between the two offerings in the context of CPUC policy objectives.

3.2 PROGRAM STAFF INTERVIEWS

In September and October 2025, the evaluation team conducted six qualitative interviews with PA, implementer, and IOU staff, including 3P implementers of the CalNEXT and GET programs, as well as contacts at each of the four California IOUs. The evaluation team first spoke with staff from each PA (i.e., SCE and SoCalGas). After speaking with the PA IOU contacts, the evaluation team spoke with both CalNEXT and GET implementation teams as well as contacts at each of the other IOUs (i.e., SDG&E and PG&E). Program staff interviews explored recent and ongoing changes to implementation processes, providing context for the review of program data and materials. They also helped identify potential barriers or challenges to data tracking efforts, explore options for improving evaluability, and understand the roles of project submitters and potential barriers to public engagement.

3.3 STAKEHOLDER INTERVIEWS

In October and November 2025, the evaluation team conducted interviews with 12 stakeholders, including 5 core partners, 5 external submitters, and 2 Statewide Stakeholder Organizations (including CalMTA). Stakeholder interviews served to solicit feedback regarding existing program processes with which respective stakeholders had direct exposure. We examined the extent to which stakeholders believe their input is incorporated into project ideas and implementation processes, and how their input can be most effectively leveraged in the future. These interviews also explored potential barriers to effective ETP contributions and whether additional support may help encourage or inform engagement among external project submitters in particular. We relied on input from program staff to help identify core partners and external submitters with recent experience submitting project ideas or otherwise engaging with the ETP. In discussions with CalMTA staff, we explored key concepts and processes applicable to both CalMTA and the ETP, including definitions of commercialization and market readiness, technology prioritization processes, ongoing coordination efforts, and areas where CalMTA and ETP can benefit one another.

Table 4 shows the number of interviews per program and type of stakeholder.

Table 4. ETP Stakeholder Interviews

Role	Number of Interviews
Core Partner	5
External Submitter	5
Statewide Stakeholder Organization	2
Total	**12**

4. DETAILED FINDINGS

4.1 OVERVIEW OF PROGRAM PROCESSES AND COORDINATION

The evaluation team explored key program phases through interviews with program staff and reviewed program implementation plans, along with other relevant program documentation. At a high level, both CalNEXT and GET follow similar core stages of implementation; however, the two programs exhibit key differences in their approach to individual steps and the parties involved. Figure 7 highlights the key phases of ETP delivery.

Figure 7. Key Phases of ETP Delivery

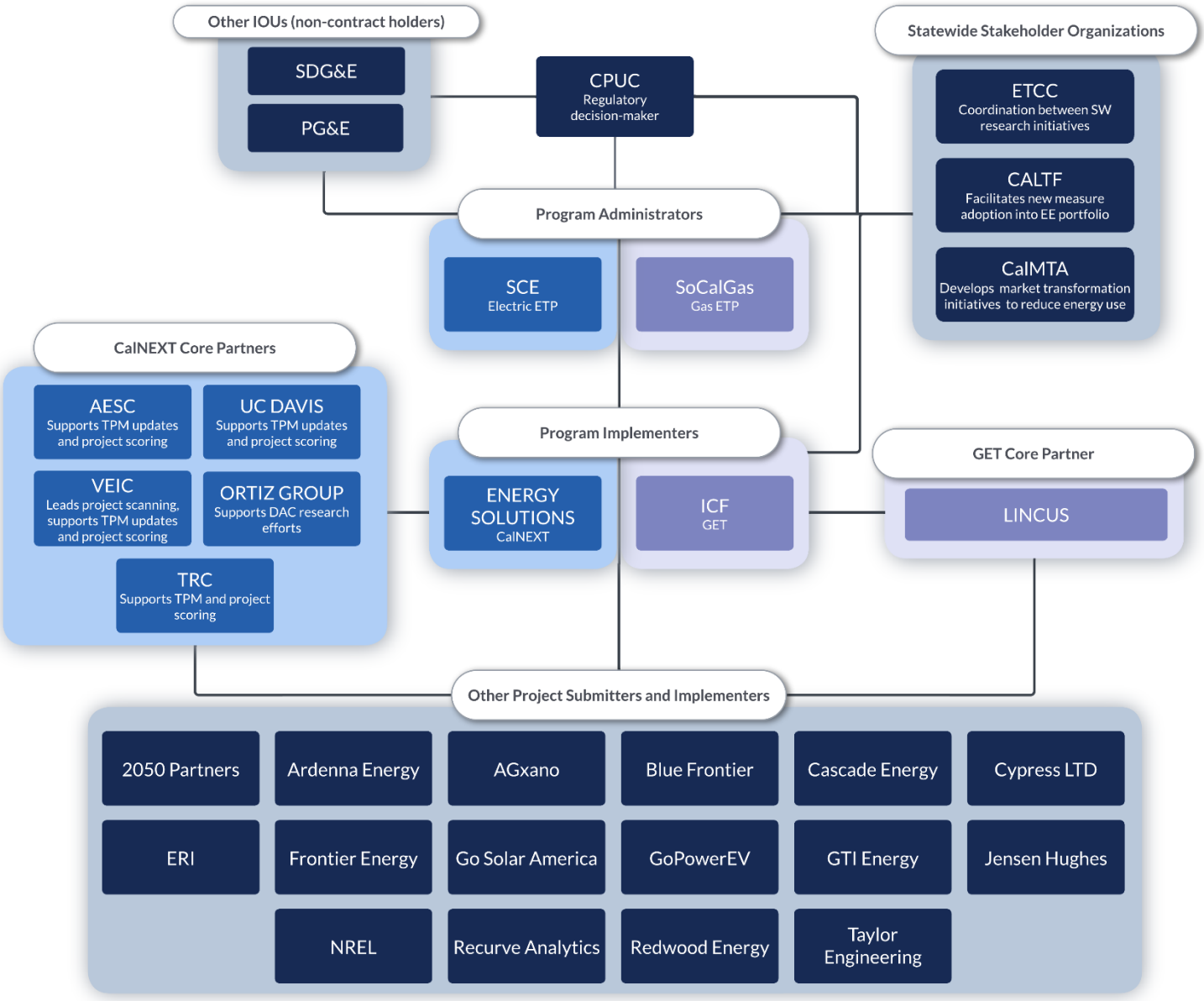
- **TPM Prioritization and Revisions:** The implementation teams lead annual updates to TPMs that define and prioritize technology families, coordinating throughout the year with partners and stakeholders on potential updates. The CalNEXT team conducts these updates annually across its six TPMs and one Focused Pilot TPM.[27] The GET team provides updates or revisions to end-use categories within their singular TPM twice a year. All TPMs are shared publicly to guide the submission of project ideas.
- **Project Submission, Scanning, and Scoring:** Program implementation teams primarily coordinate the process of soliciting, generating, and reviewing project ideas. The CalNEXT team takes a stepwise approach to soliciting submissions, communicating priority technologies to potential project submitters (e.g., technology developers, researchers, manufacturers) through email campaigns, the CalNEXT website, webinars, and other outreach activities. The GET team primarily coordinates with the GET PA and core partner to iteratively develop, review, and approve project ideas, while also allowing for external submissions. CalNEXT staff conduct scanning and scoring on a quarterly basis, while GET staff typically conduct this process on an ongoing basis.
- **Project Implementation:** Selected implementers of approved projects develop a project plan including scope, budget, and expected outcomes, which undergo review and receive feedback from implementation teams, designated SMEs, and select partners. Projects are designated as either earlier-stage Technology Development Research (TDR), later-stage Technology Support Research (TSR), or longer-term TFPs, typically involving additional cross-collaboration to investigate how new or underutilized technologies can overcome supply chain and market adoption barriers.
- **Reporting and Dissemination**: Project implementers report results from completed projects and disseminate findings to stakeholders via webinars, conferences, and direct outreach.
- **Technology Transfer Activities**: Project implementers and program staff coordinate with various stakeholders to support technology transfer and provide recommendations for potential integration into the energy efficiency portfolio, which may involve, but are not limited to, measure package development or codes and standards updates.

[27] According to CalNEXT, the Focused Pilot TPM is "a specialized TPM for specific technologies — a single technology family, subarea(s) within a technology family, or a synergetic area across multiple technology families — that focuses on market barriers and potential activities to overcome barriers." https://calnext.com/wp-content/uploads/2025/04/Focused-Pilot-TPM-2024-Final-Report.pdf.

Program staff and stakeholders indicated that core program processes and phases remained generally unchanged since 2024 for both CalNEXT and GET. However, the CalNEXT implementation team acknowledged some recent and ongoing updates to their approach to specific coordination, project planning, and technology transfer-related activities. These updates include efforts to better define technology transfer pathways and emphasize consideration of potential outcomes in the early stages of project development, tailoring which organizations to include in programmatic and project-specific updates, and enhancing coordination with external project submitters. These changes are discussed in more detail below, along with explanations of how individual program phases are operationalized.

The ETP relies on a wide-ranging network of program partners, stakeholders, and subcontractors. Figure 8 illustrates the roles and organizations that contribute to and engage with ETP efforts. The key parties and coordination processes have remained largely unchanged since 2024. However, CalMTA represents a notable recent addition, and specific core partner roles and other project submitters and implementers continually evolve from year to year.

Figure 8. ETP Organizational Chart



4.2 TECHNOLOGY PRIORITIZATION

Both CalNEXT and GET aim to advance CPUC energy efficiency and decarbonization objectives by ultimately supporting the adoption of energy-efficient measures into the energy efficiency portfolio. Both programs support the CPUC's affordability priority by frequently scoping research that emphasizes addressing cost barriers for specific technologies. While stated program objectives generally align with the CPUC's energy efficiency and affordability priorities, neither program's latest implementation plan explicitly addresses the CPUC's reliability goals. This section documents the current ETP processes for establishing and updating technology prioritization.

4.2.1 TECHNOLOGY PRIORITY MAPS

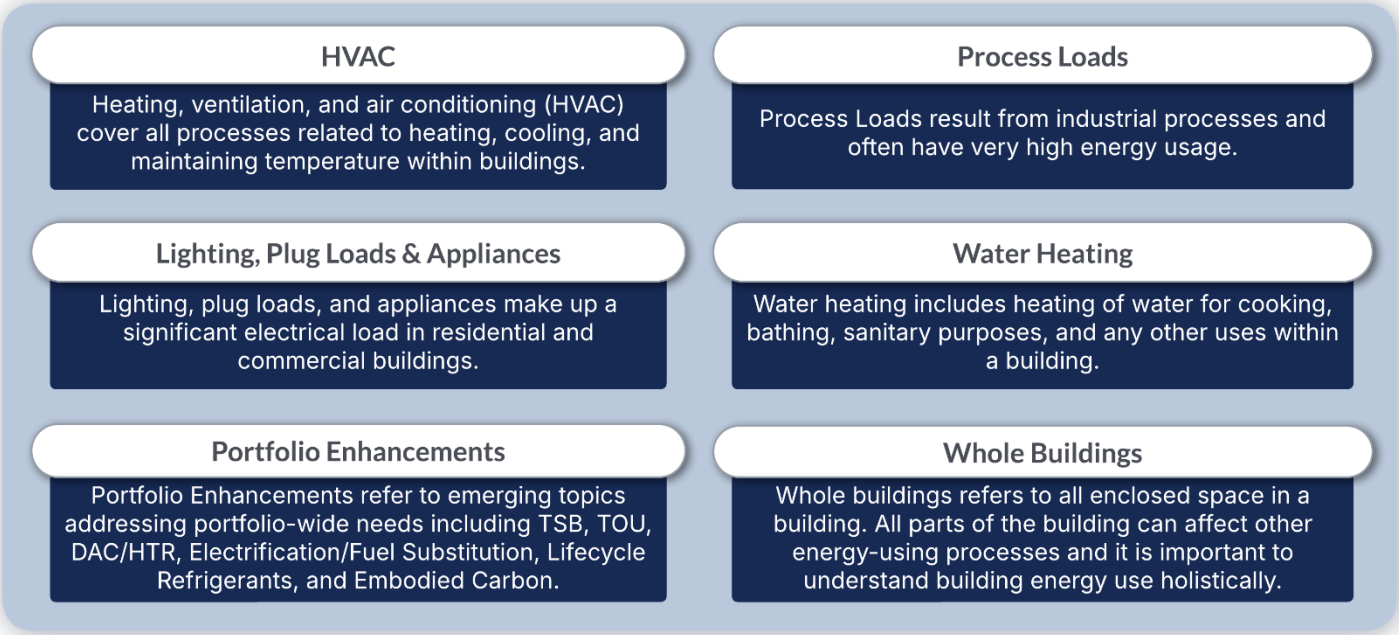
TPMs define the broad technology categories and more granular technology families identified by the implementation teams as priorities to address energy efficiency portfolio and market needs. TPMs are developed, maintained, and updated separately for CalNEXT and GET. Each program implementer works with their core partners to review and revise their TPMs at least once per year to stay current with constantly evolving market needs. Both program implementation teams consult various SMEs throughout the TPM revision and update process.

CALNEXT

Currently, CalNEXT has six primary TPMs, including (1) HVAC, (2) Portfolio Enhancements, (3) Process Loads, (4) Water Heating, (5) Whole Buildings, and (6) Lighting, Plug Loads, and Appliances. These six TPMs collectively include 40 technology families representing more granular research priorities. CalNEXT develops each TPM as a standalone PDF document. The implementation team updates a subset of TPMs each quarter and coordinates with working groups, comprised of core partner SMEs, on an ongoing basis to facilitate and support TPM revisions. These working groups examine opportunities to modernize, expand, and refine technology priorities for the upcoming year, taking into account recent technological advancements and market developments.

Figure 9 summarizes the six TPMs (i.e., defined priority technology categories) currently in place for CalNEXT.

Figure 9. CalNEXT Primary TPMs



After the working group completes draft versions of the proposed revisions, they are distributed to the TPM Advisory Committee, which includes IOU staff, for review and comment. During interviews, the implementation team noted that in prior years, they would host a single meeting for all stakeholders to share updates and gather feedback. However, in recent years, they shifted to one-on-one outreach, which they found allows for more intentionality and directness in feedback. One CalNEXT core partner expressed appreciation for this change, mentioning it was more efficient and cost-effective. Looking forward to 2026, the CalNEXT implementation team plans to build on this process by asking more targeted questions to prompt specific feedback, while still also allowing for more open-ended input.

Additionally, since many of the same stakeholders provide feedback each year, the CalNEXT implementation team noted that building these relationships has been beneficial and helped strengthen ongoing communication between parties. Once TPM revisions are finalized, the implementation team publishes the updated TPM on the CalNEXT website for public access and submits the latest version to the PA, along with any feedback received during the review process.

When asked about the TPM revision process, all the CalNEXT core partners engaged with the TPM review process (three of the four interviewed) indicated their feedback was clearly considered and generally incorporated into TPM revisions. One statewide stakeholder also mentioned they provided input on the process and saw their input acknowledged and incorporated. One non-administrator IOU contact also expressed a desire for additional time to review TPM revisions and more fully engage with the process, mentioning they typically don't get access to TPM revisions until they are nearly complete. Two core partners involved in the TPM updates and revision process expressed difficulty determining what should or should not be prioritized in the TPMs, and another core partner mentioned the need to consider the "fuzzy line" between technologies prioritized by CalNEXT and considered for CalMTA MTIs.

GET

The GET Program conceptualizes its TPM as a single collection of technology priorities spanning multiple end uses, structured as an Excel workbook with multiple sheets detailing technology and end use categories. The Program's core partner is responsible for making initial updates to the TPM and then sharing proposed revisions with the implementation team for review. After making revisions, the implementation team distributes the latest TPM to the Technical Advisory Group (TAG) to solicit technical input. The TAG is primarily comprised of ETCC members, including IOU and the California Energy Commission (CEC) staff, as well as others who provide a national perspective.[28] In 2025, the implementation team began conducting TPM updates twice per year rather than once, and one GET staff member pointed to these updates as an opportunity for the Program to "best represent where it should be targeting its efforts."

GET staff also meet quarterly with the TAG to discuss program updates, providing an opportunity to discuss TPM and research planning considerations, and help define research priorities for the subsequent program year. Staff involved in the process also suggested they may consider creating a shared document with recent project ideas among program implementers, administrators, and TAG participants to support these discussions and the TPM revision process in the future. After integrating TAG member input into the TPM, the implementation team delivers the revised TPM to the GET PA for further review and final approval.

In addition to the TPM, the implementation team develops an annual research plan to further inform GET program planning. The annual research plan represents a broader overview of the program's key focus technology priority areas for a given program year. The TPM and annual research plan are typically shared with the TAG for input on research priorities in the fourth quarter of each year, to support planning for the upcoming year. Additionally, to support the GET Program's diversity, equity, and inclusion (DEI) screening, the TAG includes several stakeholders specializing in DAC and HTR community research who provide input and guidance around research priorities in those areas.

4.2.2 TECHNOLOGY FOCUSED PILOTS

In addition to the programs' primary TPMs or technology end uses, both GET and CalNEXT can propose and implement TFPs, which focus on addressing end-to-end market barriers for specific high-impact and ready-to-use technologies.[29] TFPs typically involve more comprehensive scope and take place over longer periods than other ETP projects.[30]

CALNEXT

CalNEXT identifies TFPs through the Focused Pilot TPM, which is created through a similar, albeit more detailed, process as the other TPMs. The process begins with the implementation team and core partners holding working sessions for each Focused Pilot TPM technology family, during which they develop the first working draft. These working groups are comprised of technical SMEs. The SMEs also consult with other statewide initiatives, such as CalMTA and the California Energy Design Assistance (CEDA) program,[31] to identify how the TFPs could potentially complement them. Similar to the process for updating the core TPMs, program staff solicit feedback from the California IOUs and the TPM Advisory Committee. Once feedback is incorporated, the teams create initial blueprints for each topic area, which map the market barriers and activities of TPMs as well as the output from these activities.

[28] https://www.etcc-ca.com/about/advisors

[29] https://calnext.com/wp-content/uploads/2025/04/Focused-Pilot-TPM-2024-Final-Report.pdf

[30] While recognized by ETP implementation teams and CPUC policy language regarding required metrics, and detailed in associated TFP filings, TFPs are not formally defined by existing policy language, and GET program staff suggest the programs may benefit from more definitive policy language to define the roles of these projects.

[31] CEDA is a statewide energy efficiency program that supports new construction projects via free technical design assistance and financial incentives. https://californiaeda.com/.

After the Focused Pilot TPM is finalized and disseminated to relevant stakeholders, ETP program staff select TFP projects to include in an official Advice Letter published by the CalNEXT PA and submitted to the CPUC. After the Advice Letter receives approval from the CPUC, the program team can begin implementing the TFPs. One CalNEXT staff member mentioned that an Advice Letter could take from eight to sixteen weeks to develop, but expected that the recent change to require a Tier 1 Advice Letter in place of a Tier 2 Advice Letter would shorten the process and provide TFP implementers more time for project implementation.[32]

The 2024 TFPs (developed in 2024 and launched in 2025) include Electrification Enablement via Load Balancing Solutions, High Efficiency Rooftop Unit (HE RTU), and Commercial Heat Pump Water Heater.[33] The Electrification Enablement TFP focuses on how customers are, or are not, utilizing load-balancing technologies optimally, and includes a technology and market assessment, pilot development and demonstration, and collection of cost data. The HE RTU study builds off of CalNEXT's existing Supply Chain Engagement for Increasing Packaged Unitary Heat Pump System Adoption Focused Pilot (2023 HP RTU FP) by conducting a product characterization to define "high-efficiency" in terms of RTUs. Lastly, the Commercial Heat Pump Water Heater TFP includes a market characterization study, tracking infrastructural requirements for commercial installations, conducting contractor marketing and education, and providing reduced-cost equipment to community-based organizations (CBOs), community centers, and places of worship.

The CalNEXT implementation team takes primary responsibility for executing TFP implementation with support from CalNEXT core partners. According to one core partner, the process of selecting implementers for individual TFPs is "somewhat of a matchmaking process…partners can raise their hands if they have an interest." Implementation staff select core partners to contribute to the project. Two of the core partners mentioned that they are subcontractors to the program implementer on these TFPs, with one of them noting that the implementer typically takes the lead on these projects. The CalNEXT team finalized the 2024 Focused Pilot TPM in March 2025, which will inform development of 2025 TPMs for implementation in 2026. At the time of fielding the staff interviews, the CalNEXT team was initiating the process of developing the 2025 Focused Pilot TPM, which will inform 2026 TFPs for implementation in 2027.

GET

The GET Program develops TFPs on an ongoing basis based on the mix of current GET projects, the latest available market research, and the program team's assessment of the scale of barriers facing adoption of the given technology. As one GET staff contact stated, every GET project has the potential to become a TFP; however, it is only after projects involving a given end use are initiated that the GET team decides whether the research area may qualify as a proposed TFP. For this reason, PA staff noted that a new TFP is not guaranteed to be initiated every year and is not necessarily set or outlined at the start of the program year. As of November 2025, the GET implementation team had not initiated any TFPs for the 2025 program year, despite ongoing development of several potential TFPs intended for 2025 but limited by external factors (i.e., gas absorption heat pumps, CarbinX, GAHP Pool Heating, Direct Air Capture. and Efficient Lox Nox Burners).

[32] A Tier 1 Advice Letter can become effective upon filing and a Tier 2 Advice Letter requires staff approval before becoming effective. https://docs.cpuc.ca.gov/published/FINAL_DECISION/64140-04.htm.
[33] Southern California Edison. (April 2025). *Advice Letter 5530-E*. https://www.sce.com/regulatory/regulatory-information/advice-letters/pending.

4.3 PROJECT SOLICITATION, SCANNING, AND SCORING

Project ideas and proposals can be submitted by anyone, including implementers, core partners, external submitters, or supporting statewide organizations. Program implementers primarily lead the solicitation of these project ideas and proposals. The CalNEXT and GET websites each offer a publicly accessible portal, with the option to submit either a project idea or a project proposal on the CalNEXT website. A project idea can be an initial conceptual outline, whereas a project proposal represents a formal submission of a project that is ready for implementation. Online submission forms require the submitter to provide key details about the project, such as the technology focus area, target market sector, and expected impact of scaling the proposed technology or strategy.

4.3.1 CALNEXT

SOLICITATION

The CalNEXT implementation team promotes external project submissions through newsletters, LinkedIn posts, and participation in industry conferences and events to solicit external project submissions. Attending in-person events, in particular, enables the CalNEXT staff to have one-on-one conversations with those considering submitting a project idea or proposal. Two of the four CalNEXT external submitters interviewed stated that, although they may have received emails and accessed resources on the CalNEXT website, they originally heard about the program through their existing networks and connections. Historically, the CalNEXT implementation team paired external submitters with a CalNEXT core partner to provide as-needed support on an ongoing basis. In late 2025, the implementation team began requiring all external submitters to *partner* with a core partner on project submissions to better support and inform their application process.

CalNEXT core partners provided mixed feedback on the process of supporting external submitters with project submission. Two of the five core partners interviewed provided exclusively positive feedback on their experience supporting external submitters through the project submission process, while three of the five partners interviewed identified at least one potential area of improvement. Two of the five core partners interviewed mentioned that applications from external submitters had varying levels of quality and were sometimes not appropriately framed for the CalNEXT program, suggesting that assisting with the applications can be burdensome but ultimately beneficial for external submitters. When asked about the level of support that core partners provide to external submitters during the application phase, one core partner mentioned that the general guidance provided by the CalNEXT implementation team on the amount of time to spend supporting external submitters was insufficient to adequately support external submitters.

Two CalNEXT project implementers (one core partner and one external submitter) noted the difficulty external submitters face in understanding specific terminology and industry jargon during the submission process. These contacts suggested that some terminology is specific to the California energy efficiency sector and can be confusing to manufacturing, industry, or sales partners. The external submitter noted that they relied on their core partner to help "translate some of the program terminology and nomenclature where [they] don't have the context to fully understand what the program is looking for." However, not all external submitters experience challenges with the terminology. One external submitter stated that they were able to submit project proposals without support from core partners, but also noted they had extensive experience with the ETP and had been involved in CalNEXT since its inception.

Two external submitters and two core partners reported a lack of transparency in the application submission and approval process for external submissions. The two external submitters noted that the anticipated timing of both project proposal review and project launch/funding availability was unclear. One of the external submitters pointed to project delays as a result of the lengthy application approval timeline. Two of the programs' core partners also mentioned a lack of transparency, noting that core partners and program implementers have substantially higher odds of receiving project approval due to increased visibility into program priorities. One of these core partners mentioned that the lack of clarity also extends to the budget allocation and the number of approved projects from external submitters.

In late 2025, the CalNEXT implementation team updated the project submission process, requiring all external submitters to pair with a core partner to help with support and guidance throughout the submission process. Previously, the implementation team assigned core partners to specific project ideas or proposal submissions that required additional support on an as-needed basis. The CalNEXT implementation team stated that the additional support ranged from general assistance to full implementation of the project. According to the implementation team, pairing external submitters with core partners, who are generally more well-versed with ETP terminology and processes, is meant to help mitigate confusion and improve the likelihood of external submitters submitting viable project ideas.

Since the 2024 evaluation, the CalNEXT implementation team also updated submission templates and guidance, as well as revised timelines for when CalNEXT accepts applications from external submitters. The CalNEXT team made substantive revisions to templates for both project idea and project proposal submissions, adding detailed guidance and clarification to better support project submitters. One non-administrator IOU contact applauded the implementation team for providing these updated templates and guidance, noting that they were especially helpful for external submitters and industry partners. Other changes to the solicitation process include only accepting submissions from external participants once per submission round and closing the submission to external participants once the program has reached its budget capacity for external projects. These changes aim to enhance transparency in the program's process of accepting new project submissions from external submitters.

SCANNING AND SCORING

VEIC, one of CalNEXT's core partners, manages the quarterly intake and scanning process for CalNEXT project submissions. The core partner team begins by completing initial, high-level scanning or screening of submissions to ensure the research aligns with basic expectations outlined by the TPMs and that all necessary information is provided within the submission. This step ensures that projects moving on to scoring, a more in-depth review process, are worthwhile for core partners to take the time to review. Next, three to five SMEs are selected from core partners to conduct scoring each project. To help avoid potential biases, the scoring process is blind to other core partners besides VEIC. In cases when a core partner is the project submitter, that partner is excluded from the scoring process to prevent bias. This does not apply to the initial scanning of project submissions, as VEIC is still responsible for this step when their organization makes a submission. One CalNEXT core partner mentioned that the timeline for scoring projects is tight. Their team needs to score all the assigned applications and conduct an internal quality check of the scores in just over a week after receiving the applications.

If a project is not selected or if there are significant differences in scores assigned to the same project, the program implementer hosts a scoring meeting. During these calls, project submitters are given time to present on their project and answer questions from relevant program stakeholders and SMEs. One core partner mentioned that these meetings could benefit from having all the application scorers on the call, rather than core partner SMEs who may not have scored the project.

Since the 2024 evaluation, CalNEXT staff revised their project scoring criteria, consolidating some categories and adjusting some weights to align with the latest program priorities. Criteria focusing on TPM alignment, positioning for technology transfer, and portfolio priority level have been consolidated into a single block. Additionally, project innovation, clarity, timeline, marketing strategy, and readiness criteria are now included in an overarching "Project Quality" section. Lastly, the "Utility Benefits" criteria were reframed as "Energy Efficiency Program Benefits," partially redefined, and assigned a slightly lower weight to compensate for consideration of portfolio benefits now being included across multiple criteria. Table 5 presents the latest scoring criteria for CalNEXT submissions.

Table 5. CalNEXT 2025 Scoring Criteria

2025 Scoring Criteria	Details	Scoring Weight
TPM Alignment/Portfolio Priority/Technology Transfer	How well the project aligns with the CalNEXT TPMs, if the project is a high-priority project, and the quality and opportunity of the technology transfer proposed[A]	30%
Energy Efficiency Program Benefits	Whether the project has benefits for efficiency portfolios, load flexibility, and/or grid decarbonization	10%
Project Quality	Clarity of scope and marketing strategy, level of innovation, project readiness, and reasonableness of timeline	45%
Cost	Estimated budget	5%
DAC/HTR Impact	Whether the project has benefits for the utilities and affects Hard-to-Reach/Disadvantaged Communities	10%
Total		**100%**

[A] Note that CalNEXT TPMs reflect annual updates based on input from implementation partners and other statewide stakeholders to ensure alignment with current EE portfolio priorities.

4.3.2 GET

GET conducts project proposal, screening, and scoring processes on an ongoing basis, led by the implementation team. The implementation team aggregates ideas developed internally by the program implementer, PA, and/or core partner with those submitted via the GET website by external submitters. The program team regularly reviews and considers the aggregated ideas within the context of the annual research plan and TPM. In 2025, three external submitters contributed GET project ideas.

The implementation team reviews and scores project ideas on an ongoing basis. GET program staff consider their annual research plan, TPM, and available budget while reviewing project submissions. The implementation team noted that beginning in 2025, they have made a concerted effort to ensure the PA has visibility during the initial project idea review process. The PA noted that this increased visibility in earlier phases generally allows them to provide earlier actionable input on project ideas and effectively redirect or tailor them before they progress too far in a direction that is not suitable or viable. Once the implementer completes its internal scoring, it passes the project list to the PA for final review.

The one GET external submitter we spoke with reported a lack of clarity upfront regarding the parties involved in the approval process and how information was communicated among the program implementer and administrator. They felt that responses to their questions were sometimes lost in translation between the implementation team and PA, and suggested it would have been beneficial to have at least one conversation, including all parties, to discuss questions or concerns. The same external submitter also suggested that the timeline for project approval was unclear and indicated they would appreciate a system for tracking the status of a submitted project idea, stating that "more transparency, in general, would have helped" during the project submission process.

4.4 PROJECT IMPLEMENTATION

Both GET and CalNEXT projects may be implemented by program implementers, core partners, or external submitters. Since the 2024 evaluation, program staff indicated no major changes to the specific project implementation process across either CalNEXT or GET. However, some staff and stakeholders acknowledged adjustments to processes for facilitating ongoing coordination and feedback between project implementers and the program implementation team, as well as PAs.

Across both programs, core partners and external submitters reported that program implementers generally provided adequate levels of support and feedback throughout the project implementation process. Three of the four external submitters from CalNEXT highlighted their appreciation for the level of support provided by the implementation team, and two specifically commended the team's responsiveness. Three of the five core partners we spoke with praised implementation team members for being particularly open to ongoing, informal feedback during the implementation process. Two project implementers also noted that the level and detail of feedback from the program implementers have improved over the last couple of years.

Two core partners expressed that feedback from PAs can be delayed and is sometimes provided too late in the implementation process. However, one noted that this process has improved over the last couple of years, specifically noting that the CalNEXT PA began hosting meetings to discuss feedback, rather than solely providing written feedback on draft reports, and the change helped to streamline the process.

Two core partners mentioned the importance of receiving feedback from other core partners and stakeholders, in addition to feedback from the program implementers and PAs. One core partner specifically mentioned that the core partners are on the same team, and therefore provide critiques meant to improve each other's projects. They expressed gratitude for this level of engagement and noted that it strengthens project ideas and proposals.

4.5 PROJECT DISSEMINATION AND TECHNOLOGY TRANSFER

Following project implementation, project teams are responsible for disseminating results and supporting subsequent technology transfer efforts.

4.5.1 DISSEMINATION

Once implementation activities are completed, the project team calculates and shares the results with relevant stakeholders, including IOU staff, through the dissemination process. Both CalNEXT and GET utilize virtual outreach events (e.g., webinars), conferences, and the Energy Transition Coordinating Council (ETCC) Summit to help communicate these findings to the target audience. One interviewed IOU staff member mentioned that the timeline for providing comments on these reports (typically two weeks) can be restrictive, particularly if time is needed just to identify the most appropriate reviewer from their team. Projects' final reports summarize project activities, key findings, and recommendations for potential uses of the information moving forward. Once the report is finalized, it is posted to the ETCC and corresponding ETP website for public access and distributed to stakeholders of interest via email. One of the stakeholders interviewed also mentioned that webinars can provide a useful venue for sharing final results.

4.5.2 TECHNOLOGY TRANSFER

Technology transfer represents the final phase of an ETP project and directly follows (or overlaps) with reporting and dissemination activities. Technology transfer aims to identify the most effective pathway for integrating project results into program portfolios and engaging the relevant stakeholders in this process (e.g., IOU program staff, IOU engineering teams, CalTF). Technology transfer can occur when ETP project outcomes directly inform the adoption of a new or revised measure package for resource acquisition program implementation; however, ETP staff and stakeholders familiar with historical ETP implementation repeatedly pointed out that there are many other valuable outcomes for ETP projects, ranging from codes and standard updates to ruling out ineffective technologies.[34]

At the time of the 2024 evaluation, program staff generally acknowledged that roles and processes for technology transfer were somewhat unclear and could benefit from improved guidance and clarification. Therefore, the evaluation team recommended that program implementers and PAs work together to collectively define technology transfer responsibilities and activities. Conversations with IOU staff, implementation teams, core partners, and other program stakeholders confirmed the historical challenges with defining technology transfer activities. As one staff member mentioned, "everybody has different expectations for the ETP." Two IOU staff and three core partners acknowledged difficulties defining technology transfer and using it as a measure of success for projects.

Both CalNEXT and GET program staff noted that defining a technology transfer as a measure package update is restrictive, especially considering the potentially lengthy and sometimes unpredictable timeline for receiving feedback and approval from the CPUC. Two IOU contacts highlighted that measure package updates are not the only valuable project outcome. They cited the value of disproving the viability of certain technologies for the energy efficiency portfolio, with one noting the importance of "building a library" of easily accessible reports to inform future technology and project priorities. The need for additional internal tracking of data, such as the number of discontinued or deferred projects, is consistent with this stakeholder feedback on the value of ETPs outside of the traditional technology transfer process.

In late 2025, CalNEXT program staff made updates to the technology transfer definition and framework to help address some of these challenges. As of Q3 2025, neither CalNEXT nor GET had executed any additional technology transfer activities beyond the dissemination of research findings.

CALNEXT

The CalNEXT implementation team has taken strides to better define and acknowledge technology transfer activities via a new technology transfer framework they developed and publicized in 2025. Since the 2024 evaluation, CalNEXT staff prioritized setting clear internal and external expectations for the technology transfer process, including roles and responsibilities at an earlier stage in the project process.

[34] The CPUC energy efficiency portfolio also includes the Codes and Standards Code Compliance Program, implemented by Energy Solutions in partnership with other vendors. In light of ongoing research conducted as part of the Codes and Standards Program and elsewhere in the energy efficiency portfolio, ETP implementation staff should be cognizant of potential overlap.

CalNEXT defines the technology transfer as occurring when "stakeholders leverage CalNEXT project findings to impact the energy efficiency portfolio."[35] The integration of these project findings can often fall outside the timelines, budgets, and capacities of project teams. Two CalNEXT staff members mentioned it is particularly challenging to track technology transfer activities, as they often span multiple years and touch several different organizations. Therefore, the program requires project teams to participate in a knowledge transfer. According to the CalNEXT website, this refers to the "process of communicating project findings to stakeholders with sufficient clarity and detail to enable portfolio integration." The new technology transfer guidance establishes eight possible transfer pathways for CalNEXT projects. One CalNEXT core partner lauded the new technology transfer guidance as being for "[not necessarily] changing the reality of what a CalNEXT technology transfer entails, but adding structure to it." Table 6 outlines these newly established CalNEXT technology transfer pathway definitions.

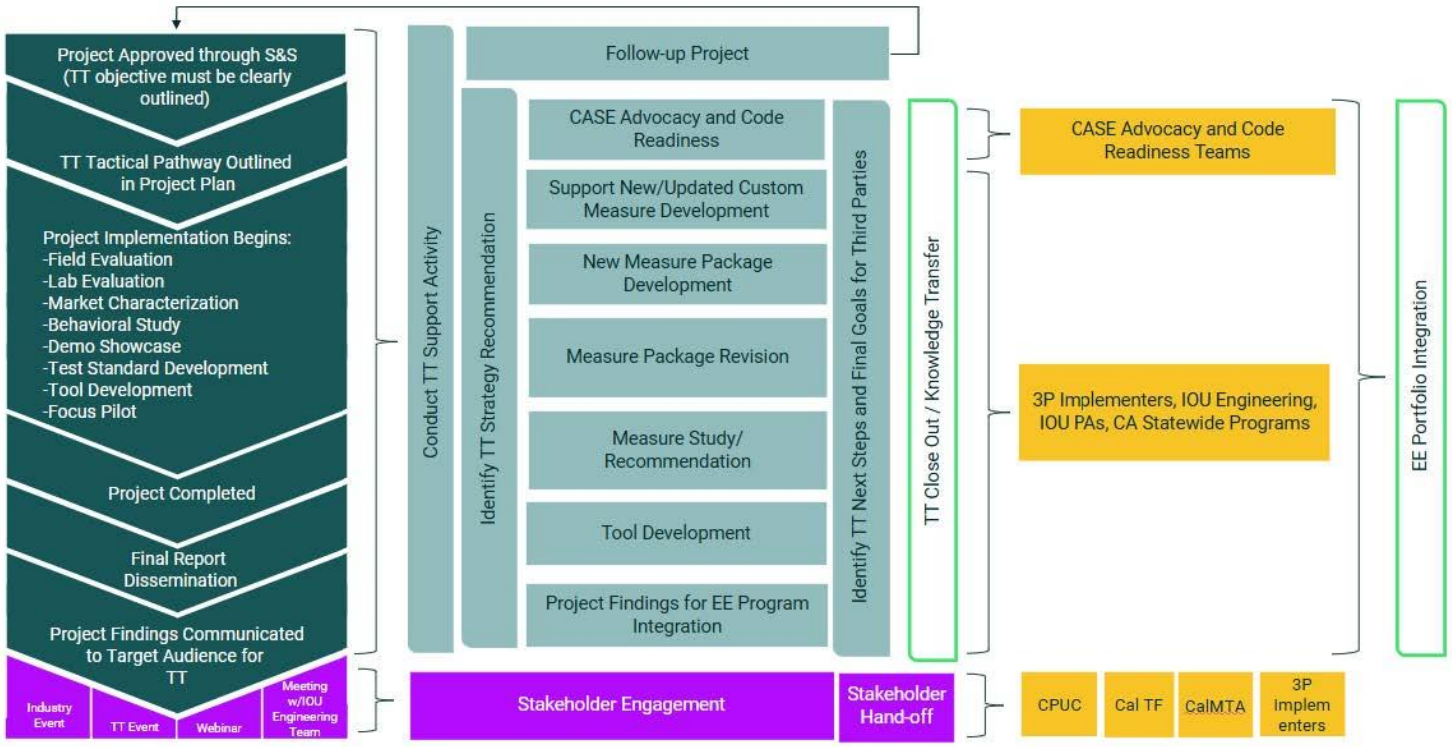
Table 6. CalNEXT Technology Transfer Pathway Definitions

Technology Transfer Pathway	Definition
CASE Advocacy and Code Readiness	CalNEXT project outcomes can be used to help define, quantify, or substantiate a Codes and Standards Enhancement (CASE) advocacy offering, such as a code change proposal or Energy Code Ace compliance resource.
Follow-Up Project	Project findings indicate that further research is needed, with the intention of pursuing this research in a subsequent CalNEXT project.
Measure Package Revision	The project team identifies revision needs in the existing Measure Package and completes the necessary work to provide proof of revision and develop the necessary components of the Measure Proposal Form and work towards a Draft Measure Package, including collecting data, identifying gaps, quantifying potential savings, and evaluating cost-effectiveness. The team coordinates to identify an IOU to sponsor the measure, and an IOU and/or 3P implementer to subsequently drive the new measure package through CalTF and CPUC affirmation.
Measure Study/Recommendation	The project team studies a market segment with the intention to indicate the need for a new or revised Measure Package, and/or studies the market's utilization of existing Measures or a set of Measures.
New Measure Package Development	The project team has identified a portfolio gap that can be addressed through the development of a new Measure Package. The project team conducts activities to develop a draft new Measure Package and coordinates to identify an IOU to sponsor the measure, and an IOU and/or 3P implementer to subsequently drive the new measure package through CalTF and CPUC affirmation.
Support New/Updated Custom Measure Development	The project team has identified a portfolio gap that can be addressed through a new or revised existing Custom Measure. Related activities may include collecting data toward a custom measure, measuring the cost-effectiveness of emerging technology, or developing savings algorithm(s) or a custom tool.
Tool Development	The project team develops tool(s) to facilitate capturing energy savings, which may be designed to: ▪ Help residential and/or commercial & industrial customers save energy ▪ Facilitate decarbonization for residential and/or commercial & industrial customers ▪ Support peak demand/load shifting for residential and/or commercial & industrial customers
Project Findings for EE Program Integration	Project recommendations are developed with the clear intent of supporting California Statewide Program design adoption, and the project team coordinates with this target audience throughout implementation to help secure adoption of these recommendations.

[35] CalNEXT, *Updates on the CalNEXT Project Selection Process* (September 23, 2025). https://calnext.com/wp-content/uploads/2025/09/CalNEXT-Scanning-and-Screening-Webinar-092325.pdf; CalNEXT, *Technology Transfer Guidance*, (September 15, 2025); https://calnext.com/resources/.

In addition to further defining the technology transfer process, the CalNEXT team recently developed supplementary resources and systems to prioritize technology transfer earlier in the project process, starting from the initial project or idea submission. Figure 10 outlines the reenvisioned technology transfer process, as defined by CalNEXT.

Figure 10. CalNEXT 2025 Technology Transfer Process Flow



Source: CalNEXT. (September 2025). *Updates on the CalNEXT Project Selection Process.* https://calnext.com/wp-content/uploads/2025/09/CalNEXT-Scanning-and-Screening-Webinar-092325.pdf.

While a technology transfer criterion was already included in the previous CalNEXT scoring criteria, beginning in 2026, all project submitters will need to select the type of technology transfer pathway that is most relevant to their project during the application phase. CalNEXT program staff launched these technology transfer pathways in late 2025, as they began reviewing applications for the 2026 program year. In addition to selecting their technology transfer pathway, project teams are asked to identify potential stakeholders who will be engaged through the dissemination and technology transfer process in their initial submission.

After a project has passed the scanning and screening process, project teams will complete a Performance Benchmark Survey, which is not contractually binding but serves as an internal tracking mechanism to ensure that project activities are aligned with achieving the chosen technology transfer pathway. As projects are implemented, project teams are encouraged to track stakeholder engagement throughout the project. These outreach and engagement activities are included in the methodology section of both the draft and final project reports, as well as the project team's Distribution Report. The Distribution Report is the primary deliverable for illustrating dissemination and the technology transfer activities. Lastly, after the PA has accepted the final report, project teams fill out the Transfer and Adoption questionnaire to outline how the project findings were adopted.

Given project findings may take significantly longer to be adopted into portfolios than is within the scope of CalNEXT project timelines, CalNEXT staff will check in with finalized projects on a biannual basis to solicit updates on technology transfers. Even so, technology transfer outcomes may not always be directly measurable or definitively tied to CalNEXT research that helped inform them and may therefore be underrepresented by these ongoing efforts to track eventual

outcomes. All of the above processes and requirements are outlined in a Technology Transfer Guidance document that is provided to program participants.

Recent changes, including additional definitions of what a technology transfer entails and a new focus on technology transfer earlier in project implementation, aim to enhance the clarity of the technology transfer process.

GET

Since the 2024 evaluation, the GET implementation team and PAs have not made any substantial changes to the technology transfer process.

4.6 CALMTA ENGAGEMENT

Decision 19-12-021 established CalMTA as a statewide, 3P-implemented program focusing on long-term market transformation by accelerating the adoption of energy-efficient technologies and practices.[36] CalMTA collaborates with a diverse range of stakeholders to identify and develop MTIs that aim to mainstream energy efficiency, helping California achieve its energy and climate goals while promoting workforce development and equity.[37] In establishing CalMTA, Decision 19-12-021 also introduced the market transformation framework and the Market Transformation Advisory Board (MTAB) to help guide development of MTIs.

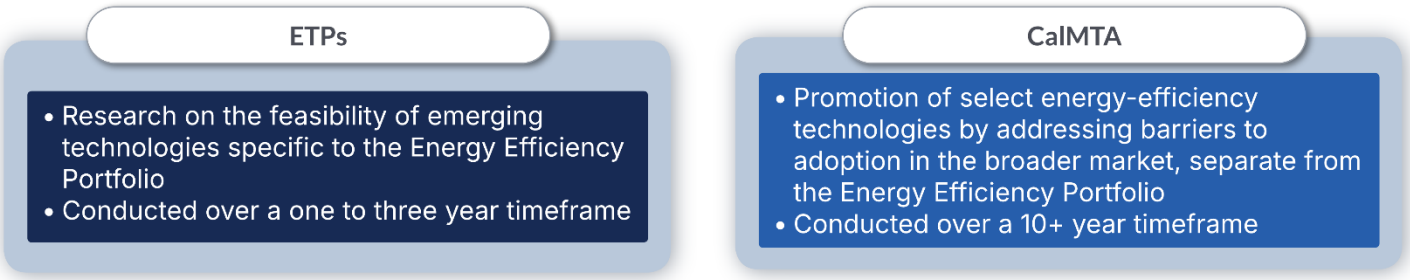
In November 2025, Decision 25-11-023 approved Room Heat Pumps as CalMTA's first MTI and conditionally approved Induction Cooktops as a potential second MTI.[38] This decision called for coordination between CalMTA and existing CPUC programs, "with the purpose of achieving complementarity and synergy." Additionally, the decision granted CalMTA "primacy," stating that "the onus for coordination should be on other administrators to ensure coordination with CalMTA." However, the Decision also offered that "interventions in individual portfolios should be coordinated with CalMTA's MTIs, as much as CalMTA should also coordinate with the other administrators and programs." Ultimately, Decision 25-11-023 opted to "defer consideration of these issues to the energy efficiency rulemaking (R.25-04-010) to ensure full vetting of the issue." This does not change the ETP's mandate but rather encourages increased coordination to minimize duplication and ensures rate payer dollars are most effectively spent and encourages the CPUC to consider how best to operationalize future cross-coordination efforts by energy efficiency portfolio programs.

According to CalNEXT and CalMTA staff, CalMTA focuses on strategies to promote the adoption of market-ready technologies into the broader market, whereas the ETP focuses on research aimed at demonstrating feasibility of market adoption and inclusion in the energy efficiency portfolio. Staff with both CalNEXT and CalMTA mentioned that while the programs may focus on similar technologies, their efforts are delineated not only by target outcomes, but also by differentiation in targeted market stages project timelines. While the ETP focuses on researching technologies in earlier market stages with projects lasting one to three years, CalMTA focuses on market-ready technologies and promoting market transformation over longer time periods.

[36] https://calmta.org/wp-content/uploads/2025/04/321507615-2.pdf
[37] https://calmta.org/about/
[38] https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M588/K645/588645495.PDF.

Figure 11 outlines the primary differences in the scope of the ETP relative to CalMTA.

Figure 11. Key Distinctions Between ETP and CalMTA Offerings



Note: While ETP projects are typically conducted over a one to three year timeframe, ETP research on a given technology can span multiple projects over longer time periods.

CalMTA, CalNEXT, and GET staff discussed opportunities to coordinate and build upon each other's work. CalMTA staff acknowledged they have a mandate to "minimize redundancy in the market" and a core tenet of avoiding duplication of work. They therefore prioritize coordinating with other programs, including the ETP. Additionally, CalMTA, CalNEXT, and GET staff all acknowledged that CalMTA's initiatives thus far have primarily targeted electrification and electric-savings technologies. However, CalMTA and GET staff acknowledged recent efforts to increase coordination between their programs and the potential for CalMTA to include gas and fuel-neutral technologies in the future.

CALNEXT

According to CalMTA and CalNEXT staff, their teams meet at least once a month and provide quarterly written updates to the CPUC on their current coordination efforts. CalMTA staff mentioned that their meetings to date have focused on opportunities to leverage one another's research to address market needs, meet shared goals, and minimize duplication across the two programs. Quarterly updates highlight that the two programs have increased coordination since the end of 2024, primarily through CalMTA's enhanced involvement in the CalNEXT TPMs and TFPs revisions process, as well as the scanning and screening process and submission of project ideas. Additionally, both programs have attempted to collaborate more across specific projects. CalNEXT and CalMTA have each submitted at least one project idea to the other initiative.

While there have been increased efforts to enhance coordination between the two programs, recent quarterly reports and staff interviews indicate that data-sharing limitations have hindered some project collaboration. Data-sharing limitations arose in specific project work, where CalMTA expressed interest in accessing detailed project data that had not yet been made publicly available. CalMTA staff mentioned they provided additional funding to one existing CalNEXT project and anticipated doing so would support some degree of enhanced data sharing.[39] However, their subsequent request for data associated with the ongoing project raised concerns among the CalNEXT program team regarding sensitive customer Personally Identifiable Information (PII). CalMTA staff emphasized that they do not require access to PII and only ever need access to anonymized, customer-level data. Still, CalMTA and the CalNEXT PA opted to establish a formal non-disclosure agreement (NDA) to better enable data sharing. However, CalMTA staff suggested that even after establishing the NDA, they continued to face challenges soliciting data from the CalNEXT team, pointing to an indirect process by which they were required to request through the PA, who requested from implementation team, who gathered from project partners.

[39] Notably, PA staff indicated the possibility of some miscommunication regarding cofounding of a CalNEXT project, and this topic may benefit from follow-up between parties to help clarify.

CalNEXT staff cited broader concerns around sharing data from ongoing projects with CalMTA. One staff member noted it is difficult to provide data while the project is in flight given information is "changing constantly," and that is in part why they prefer to disseminate results systematically to stakeholders following project completion. Additionally, some CalNEXT program staff raised concerns about the potential perception of preferential treatment if CalMTA (implemented by Resource Innovations) were granted early or enhanced access relative to other interested parties. With Decision 25-11-023 establishing the need for energy efficiency portfolio administrators to coordinate with CalMTA, the door remains open for development of more streamlined data sharing practices between CalNEXT and CalMTA.

GET

While coordination between CalMTA and GET has been limited to date, the two teams met in October 2025 to discuss potential opportunities for further collaboration. CalMTA staff mentioned some upcoming fuel-neutral projects, including a window product and a whole-building renovation. The GET implementation team also highlighted gas heat pumps as one area that may have potential as a future MT initiative. However, CalMTA staff noted that the Total System Benefit (TSB) metric used to inform MTI prioritization inherently favors electric technologies through its decarbonization component. CalMTA staff also noted that they do have some fuel-neutral MTI ideas in development, but that submissions of gas-only technologies have been minimal thus far. GET PA staff noted in response that "gas-to-gas measures typically have higher TSBs in comparison to electric-to-electric measures" and highlighted that gas-to-electric fuel substitution measures can be cost-restrictive, particularly for Disadvantaged Communities, which may limit the benefit of CalMTA efforts to members of such communities.

4.7 DEFINITION OF COMMERCIALIZATION

As a part of the 2024 ETP Process and Effectiveness Evaluation, evaluators recommended that program staff "collectively define what 'five years from commercialization' means in terms of the state of a technology."[40] The concept of commercialization is central to determining whether individual technologies qualify for consideration within the ETP's framework and is explicitly referenced by existing policy-defined indicators ('metrics' before Resolution E-5351 passed in June 2025). Establishing a more explicit shared understanding of how to define commercialization can help inform ongoing project development and screening, as well as efforts to accurately track and report on ETP progress and outcomes.

The evaluation team explored this topic with both program and stakeholder staff. GET program staff mentioned that they added Technology Readiness Levels (TRLs)[41] to their TPM, assigning a TRL value to each technology end use. When asked about how they define commercialization, CalNEXT program staff suggested that it plays a role in determining whether a project is better suited as a TDR or TSR,[42] but acknowledged they do not have a concrete working definition for the term. While program staff indicated they had a good working understanding of commercialization in their respective programs, they do not currently rely on an explicit shared definition. GET staff also noted that the "five years from commercialization" is not necessarily rigid, and they are not prevented from considering technologies which are commercialized but not well adopted.

[40] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view

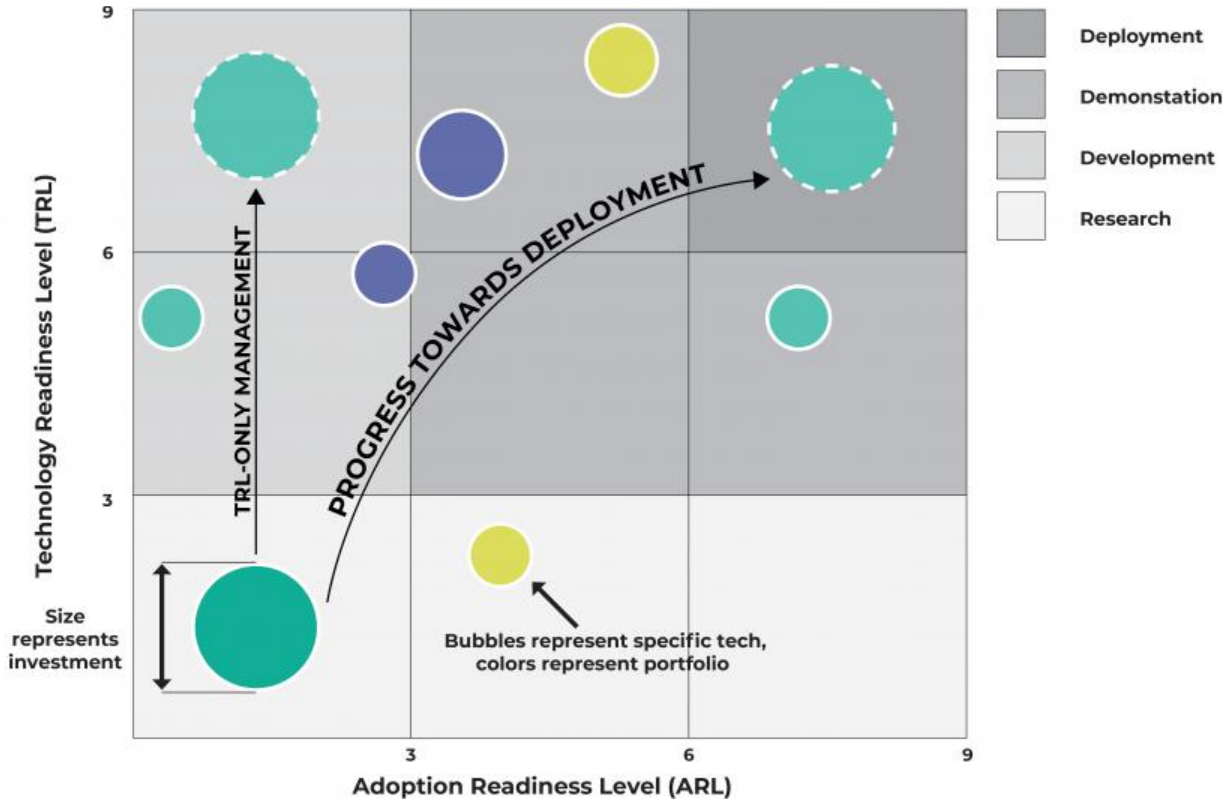
[41] TRLs identify the readiness level of a given technology, ranging from technologies that have the basic principles observed and reported to technologies that have been fully demonstrated. https://www.energy.gov/sites/prod/files/2016/07/f33/technology_readiness_levels.docx

[42] Technology Development Research (TDR) is typically earlier-stage research, while Technology Support Research (TSR) is typically later-stage research. These terms are used to define different types of ETP projects.

CalMTA staff acknowledged that rather than "commercialization," they focus on "market readiness" as defined by the Department of Energy (DOE) Adoption Readiness Assessment.[43] While the adoption readiness language and framework may be cumbersome to fully address for every ETP project, it could serve as a valuable point of reference for ETP program staff and project submitters in instances where a technology's 'commercialization' status is in question.

The Adoption Readiness Assessment accounts for Adoption Readiness Level (ARL), which represents non-technical risks, in addition to TRL, which represents technical risks. TRLs were originally developed in the 1970s and are used to establish technical market barriers. The ARLs were developed to complement the TRLs by identifying potential non-technical market barriers that new technologies may face, such as market acceptance, regulatory barriers, or community perceptions. The DOE created an assessment that incorporates both TRLs and ARLs, including 17 dimensions across four key risk areas: value proposition, market acceptance, resource maturity, and license to operate. The assessment provides a score ranging from one to nine, with one indicating the lowest readiness and nine indicating the highest readiness. CalMTA staff noted that they do not consider a technology ready for market until it receives a score of nine on the Adoption Readiness Assessment. Figure 12 illustrates the conceptual framework for the Adoption Readiness Assessment.[44]

Figure 12. Adoption Readiness Assessment Framework



Source: U.S. Department of Energy. *Adoption Readiness Assessment*. (April 2025). https://www.energy.gov/sites/default/files/2025-09/ARL%20Assessment%209-23-25_0.pdf.

[43] https://www.energy.gov/sites/default/files/2025-09/ARL%20Assessment%209-23-25_0.pdf; https://www.energy.gov/technologycommercialization/core-risk-areas?nrg_redirect=473849

[44] The y-axis represents traditional consideration of TRLs only, whereas the Adoption Readiness Assessment also incorporates ARL with a target of 9 for each score representing a technology's full deployment or adoption readiness.

4.8 PROGRAM METRICS AND INDICATORS

As part of the data and material review, the evaluation team reviewed both policy-defined reporting metrics and indicators required of the ETP in recent years, as well as internal key performance indicators (KPIs) recommended by the 2024 evaluation. This section provides an overview of recent CPUC policy developments relating to ETP metrics and indicators, as well as feedback from program staff regarding recent changes to ETP tracking and reporting processes and the value of both the latest policy-defined indicators and proposed internal KPIs.

4.8.1 REPORTING METRICS AND INDICATORS

At the time of original ETP 3P contract development, CPUC Decision 18-05-041 served as the latest definition of ETP reporting metrics. These metrics were therefore included in the original contracts for both CalNEXT and GET 3P implementation. As such, program staff indicated they have continued to report on these contractually specified metrics since the launch of the 3P programs in 2021 and 2022. Table 7 lists the ETP metrics defined by Decision 18-05-041.[45]

Table 7. ETP Metrics Established by Decision 18-05-041

ETP Metric	Description
CalNEXT	
ETP-M1	Number of Technology Priority Maps initiated, including one Focused Pilot TPM, identifying market barriers for a diverse range of high-impact technologies through studies, and subsequently breaking down identified barriers via cooperative projects initiated in coordination with Workforce Education and Training, Marketing and Outreach, and other relevant IOU programs
ETP-M2	Number of Technology Priority Maps updated
ETP-M3	Number of projects initiated
ETP-M4	Number of outreach events with developers of energy efficiency products (in whole or in part) that are less than one (1) year from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs)
ETP-M5	Number of outreach events with developers of energy efficiency products (in whole or in part) that are less than five (5) years from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs)
ETP-M6	Number of projects initiated with cooperation from other internal IOU programs associated with each Focused Pilot
ETP-M7	Number of Focused Pilots initiated as part of the Focused Pilot TPM
ETP-T1	For each year, the percentage of technologies added as new measures to the energy efficiency resource portfolio that were previously supported by SWEETP
ETP-T2	For each year, the number of technologies added as new measures to the energy efficiency resource portfolio that were previously supported by SWEETP
ETP-T3	For each year, the percentage of new codes or standards adopted and previously supported by SWEETP
ETP-T4	For each year, the number of new codes or standards adopted and previously supported by SWEETP
ETP-T5	Savings from measures currently in the portfolio that were supported by emerging technologies programs, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available
ETP-T6	Number and source (as reported by submitter) of potential emerging technology project ideas submitted outside of the Technology Priority Map research planning process, submitted by an IOU, a national lab, a manufacturer, or an entrepreneur

[45] https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M312/K767/312767044.docx

ETP Metric	Description
ETP-T7	Number and source (as reported by submitter) of potential emerging technology project ideas submitted during the Technology Priority Map research planning process, submitted by an IOU, a national lab, a manufacturer, or an entrepreneur
ETP-T8	Number of SWEETP projects and technologies aligned with specific statewide goals, with specificity as to what aspect of each goal it is fulfilling
GET	
ETP-M1	Number of TPMs initiated (gas and electric combined), including one (1) technology-focused pilot (TFP) TPM
ETP-M2	Number of Technology Priority Maps updated
ETP-M3	Number of projects initiated
ETP-M4	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs
ETP-M5	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs
ETP-M6	Number of projects initiated with cooperation from other internal IOU programs associated with each Focused Pilot
ETP-M7	Number of Focused Pilots initiated as part of the Focused Pilot TPM

In 2023, Decision 23-06-055 introduced 25 market support indicators based in part on recommendations from the California Energy Efficiency Coordinating Committee (CAEECC) Market Support Metrics Working Group (MSMWG).[46] Decision 23-06-055 indicated "there are several common metrics that were adopted within Decision 18-05-041 that have not been used and/or may no longer be relevant or useful."[47] The Decision therefore removed or paused many common metrics associated with the statewide programs, including ETP.

Decision 23-06-055 also recommended that CAEECC re-engage the MSMWG and Equity Metric Working Group (a separate effort focused on the equity segment of the energy efficiency portfolio) to discuss and provide clarification on the adopted equity and market support indicators. CAEECC reconvened by consolidating the two working group efforts into a single Equity and Market Support Working Group (EMSWG) and recommended modifications to the 25 market support indicators adopted in Decision 23-06-055. In March 2024, the CAEECC EMSWG reached a consensus that the market support indicators would be used to measure the impacts of market support segment programs; however, the working group made no clear adjustments to refine the market support indicators from segment-level to program-level measurements.[48]

[46] The charge of the CAEECC MSMWG was to identify and define the most important objectives and associated key metric(s) for the new Market Support portfolio segment established in CPUC Decision 21-05-031.

[47] https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M512/K907/512907396.docx

[48] https://www.caeecc.org/_files/ugd/849f65_811eb0401da74baebe65034d82232234.pdf

Table 8 summarizes the 25 segment-level market support indicators recommended by Decision 23-06-055 and clarified by subsequent CAEECC EMSWG recommendations in March 2024.

Table 8. Market Support Indicators Established by Decision 23-06-055

Indicator	Indicator Description Adopted in D.23-06-055
MS-1	Number of partners by type and purposes (Q, P)
MS-2	Dollar value of non-ratepayer in-kind funds/contributions utilized via partnerships (A, P)
MS-3	Percent of participation relative to eligible target population for curriculum (Q, S)
MS-4	Percent of total WE&T program participants that meet the definition of disadvantaged worker (Q, S)
MS-5	Number of career and workforce readiness participants who have been employed for 12 months after receiving the training (A, S)
MS-6	Prior year percentage of new measures added to the portfolio that were previously emerging technology program (ETP) technologies (A, P)
MS-7	Prior year number of new measures added to the portfolio that were previously ETP technologies (A, P)
MS-8	Prior year percentage of new codes or standards that were previously ETP technologies (A, P)
MS-9	Prior year number of new codes and standards that were previously ETP technologies (A, P)
MS-10	Savings (lifecycle net kWh, kW, and therms) of measures currently in the portfolio that were supported by ETP, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available (A, P)
MS-11	Number of new, validated technologies recommended to the California Technical Forum (A, P)
MS-12	Cost-effectiveness of a technology prior to market support program relative to the cost-effectiveness of a technology after intervention by the market support programs (percentage change in cost-effectiveness) (A, S)
MS-13	Number of collaborations, with contextual descriptions, by business plan sector to jointly develop or share training materials or resources (A, P)
MS-14	Number of unique participants by sector that complete training (Q, S)
MS-15	Number of projects (outside of ETP) that validate the technical performance, market and market barrier knowledge, and/or effective program interventions of an emerging/under-utilized or existing energy-efficient technology (A, P)
MS-16	Total projects completed/measures installed and dollar value of consolidated programs by sector (Q, P)
MS-17	Ratio of ratepayer funds expended to private capital leveraged by sector (Q, P)
MS-18	Percentage of partners that have taken action supporting energy efficiency by type (Q, P)
MS-19	Number of contractors (that serve in the portfolio administrator service areas) with knowledge and trained by relevant market support programs to provide quality installations that optimize energy efficiency (Q, S)
MS-20	Assessed value of the partnership by partners (A, P)
MS-21	Percent of market penetration of emerging/under-utilized or existing energy efficiency products or services (A, P)
MS-22	Percent of market participant awareness of emerging/under-utilized or existing energy efficiency products or services (A, P)
MS-23	Aggregated confidence level in performance verification by production, project, and service (for relevant programs) (A, P)
MS-24	Differential of cost defrayed from customers (e.g., difference between comparable market rate products and program products) (A, P)
MS-25	Comparisons between market-rate capital vs. capital accessed via energy efficiency programs (e.g., interest rate, monthly payment) (A, P)

Note: Q = Report Quarterly; A= Report Annually; S = Report at Segment Level; P = Report at Portfolio Level

Most recently, in June 2025, Resolution E-5351 followed up on D.23-06-055 to further revise market support metrics and indicators, clarifying certain indicators while removing or revising others.[49] Resolution E-5351 effectively converted most existing ETP metrics to indicators while removing a few others deemed unnecessary or misaligned with program-driven outputs. Indicators differ from metrics in that metrics require a defined baseline and target outcome. In contrast, indicators are designed to track and demonstrate ongoing progress in the absence of specific targets or baselines. As of October 2025, CalNEXT and GET PAs, along with their implementation teams, were in the process of assessing how this latest resolution would impact internal data tracking processes and integrate into the next round of implementation contracts; however, they had yet to adopt any formal changes to their associated tracking and reporting processes. When asked about the implications of this change, two program staff contacts acknowledged they expect it may simplify tracking processes. Table 9 outlines the impacts of Resolution E-5351 on each ETP metric (i.e., whether the metric was removed or converted to an indicator).

Table 9. Changes to ETP Metrics by Program Established by Resolution E-5351

ETP Metric	Description	Resolution E-5351 Change
CalNEXT		
ETP-M1	Number of TPMs initiated, including one TFP TPM	Changed to an indicator
ETP-M2	Number of TPMs updated	Changed to an indicator
ETP-M3	Number of projects initiated	Changed to an indicator
ETP-M4	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Changed to an indicator
ETP-M5	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Changed to an indicator
ETP-M6	Number of projects initiated with cooperation from other internal IOU programs associated with each TFP	Changed to an indicator
ETP-M7	Number of TFPs initiated as part of the TFP TPM	Changed to an indicator
ETP-T1	For each year, the percentage of new measures added to the portfolio that were previously ETP technologies	Removed
ETP-T2	For each year, the number of new measures added to the portfolio that were previously ETP technologies	Removed
ETP-T3	For each year, the percentage of new codes or standards that were previously ETP technologies	Removed
ETP-T4	For each year, the number of new codes or standards that were previously ETP technologies	Removed
ETP-T5	Number of savings of measures currently in the portfolio that were supported by emerging technologies programs, added since 2009. Ex-ante with gross and net for all measures, with ex-post where available	Removed
ETP-T6	Number and source (as reported by submitter) of potential emerging technology project ideas submitted outside of the Technology Priority Map research planning process, submitted by an IOU, a national lab, a manufacturer, or an entrepreneur	Changed to an indicator
ETP-T7	Number and source (as reported by submitter) of potential emerging technology project ideas submitted as part of the annual Technology Priority Map research planning process, submitted by an IOU, a national lab, a manufacturer, or an entrepreneur	Changed to an indicator
ETP-T8	Number of ETP projects aligned with statewide goals that were initiated in the reporting year, with specificity as to what aspect of each goal they are fulfilling	Removed

[49] California Public Utilities Commission. (June 2025). *Resolution E-5351.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M569/K136/569136233.pdf

ETP Metric	Description	Resolution E-5351 Change
GET		
ETP-M1	Number of TPMs initiated, including one TFP TPM	Changed to an indicator
ETP-M2	Number of TPMs updated	Changed to an indicator
ETP-M3	Number of projects initiated	Changed to an indicator
ETP-M4	Number of outreach events with technology developers with products <1 year from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Changed to an indicator
ETP-M5	Number of outreach events with technology developers with products <5 years from commercialization, including new technology vendors, manufacturers, and entrepreneurs	Changed to an indicator
ETP-M6	Number of projects initiated with cooperation from other internal IOU programs associated with each TFP	Changed to an indicator
ETP-M7	Number of TFPs initiated as part of the TFP TPM	Changed to an indicator

4.8.2 INTERNAL KEY PERFORMANCE INDICATORS

As part of the 2024 ETP Process and Effectiveness Evaluation, the evaluation team developed an ETP program theory logic model (PTLM) along with program theory-driven KPIs designed to ensure each program can feasibly track progress toward common goals and objectives characterized in the revised PTLM.[50] Several of these recommended internal KPIs are partially or fully aligned with the required ETP reporting metrics established by Decision 18-05-041 prior to the launch of 3P-implemented ETP offerings.[51] These 2024 recommendations did not undergo a formal response-to-recommendations process and were therefore not necessarily addressed or required for integration by ETP PAs and implementation teams.

The CalNEXT implementation team mentioned prioritizing other program updates, such as the technology transfer process, over updating their internal data tracking in the last year. One CalNEXT staff member stated that they "prioritized the technology transfer process and other updates that they could do to have immediate impacts this program year," going on to say once they had their contract extension, they could focus on tracking metrics.

The evaluation team requested the latest available data on these 2024 KPI recommendations to understand the degree to which ETP program staff have these data readily available (despite no formal requirement to begin tracking them) and contextualize subsequent interviews with program staff. Overall, both CalNEXT and GET program staff were able to provide sufficient data for a majority of the recommended internal KPIs.

[50] Notably, project outcomes and technology transfer activities may not always be directly measurable or definitively tied to ETP research that helped inform them and may therefore be underrepresented by ongoing efforts to track eventual outcomes.

[51] The 2024 ETP Process and Effectiveness Evaluation took place after the passage of Decision 23-06-055 and prior to Resolution E-5351, at which time both CalNEXT and GET were continuing to track metrics defined in 2018 by Decision 18-05-041 prior to 3P contract development

Table 10 lists the internal KPIs recommended by the 2024 evaluation, along with the associated data provided by the CalNEXT implementation team in August 2025 and the evaluation team's interpretations and recommendations.

Table 10. CalNEXT Internal KPIs Reported for 2025

Key Performance Indicators	CalNEXT Response	Sufficiency of Existing KPI Tracking
Number and type of technology families identified for prioritization	HVAC: 8 Water Heating: 5 Whole Buildings: 6 Lighting, Plug Loads, and Appliances: 6 Process Loads: 8 Portfolio Enhancements: 6	Sufficient tracking
Number of SMEs consulted with for each technology family[a]	HVAC: 10 Water Heating: 8 Whole Buildings: 8 Lighting, Plug Loads, and Appliances: 10 Process Loads: 11 Portfolio Enhancements: 11	Sufficient tracking
Number of outreach attempts by channel with developers of energy efficiency products (in whole or in part) that are less than five (5) years from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs) (ETP-M5)	Six outreach events committed as of August 2025.	Sufficient tracking
Percentage of unique ideas that move to project scoring by technology family (Idea Evaluation Approval Rate)	HVAC: 31% Water Heating: 17% Whole Buildings: 43% Lighting, Plug Loads, and Appliances: 75% Process Loads: 86% Portfolio Enhancements: 60%	Sufficient tracking
Number of total project idea submissions	46 project submissions	Sufficient tracking
Number and percentage of submissions that align with Technology Priority Map priorities	72%	Sufficient tracking
Stakeholder satisfaction with the project submission process (Idea Submission Process Satisfaction)*	There has only been one response from the two submission round surveys the Program Team conducted in 2025. The following includes the one response from the 2025 surveys: Overall satisfaction with project and idea submission: very satisfied	Insufficient, explore opportunities to further encourage or incentivize feedback
Number of projects initiated (broken out by Technology Support Research, Technology Development Research, and Focused Pilots)[b] (ETP-M3)	TSR: 31 TDR: 10 Focused Pilots: 0 confirmed for 2025, 3 ongoing from 2024	Sufficient tracking
Number of Technology Focused Pilots initiated as part of the Technology Focused Pilot Technology Priority Map (ETP-M7)	2025 TFPs: 0 2024 TFPs being implemented in 2025: 3	Sufficient tracking

Key Performance Indicators	CalNEXT Response	Sufficiency of Existing KPI Tracking
Number of projects initiated with cooperation from other internal IOU programs associated with each Focused Pilot[b] (ETP-M6)	No 2025 Focused Pilots committed to date	Sufficient tracking
Number of technology recommendations and intervention strategies provided	Not provided	Insufficient, not currently available
Number and percentage of codes and standards recommendations presented	Not provided	Insufficient, not currently available
Number and percentage of measure packages initiated	Zero / 0%	Sufficient tracking, but not yet relevant
Number and percentage of measure packages developed[c]	Zero / 0%	Sufficient tracking, but not yet relevant
Number of Technology Priority Maps initiated, including one Focused Pilot Technology Priority Map (ETP-M1)	Zero new Technology Priority Maps (TPMs) initiated	Sufficient tracking
Number of Technology Priority Maps updated (ETP-M2)	7 updated TPMs were committed for 2025 to date.	Sufficient tracking
Percent of project submitters aware of Technology Priority Map priorities*	100%. All project submitters must be aware of the TPMs, as this is a large portion of the project submission.	Sufficient tracking
Number of approved and discontinued project submissions (including the number of projects discontinued due to misalignment with Technology Priority Map priorities)	17 projects have been approved, and 0 have been deferred	Sufficient tracking
Number of total project submissions received	83 total received	Sufficient tracking
Number and percentage of approved, deferred, and discontinued project submissions (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (Technology Projects Discontinued) Number and percentage of completed projects[b] (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) Number and percentage of final reports completed (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (Technology Project Final Reports)	**Approved:** TSR: 13 / 19% TDR: 4 / 6% Focused Pilots: 0 / 0% **Deferred:** TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0% **Discontinued:** TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0% **Completed:** TSR: 8 / 18% TDR: 0 / 0% Focused Pilots: 1 / 2% **Final Reports:** TSR: 7 / 6% TDR: 0 / 0% Focused Pilots: 1 / 2%	Sufficient tracking
Number of dissemination activities conducted by channel (i.e., webinars, conferences, LinkedIn posts, email campaigns)	**LinkedIn:** 5 posts with links, engagement, impressions, and click-throughs	Sufficient tracking

Key Performance Indicators	CalNEXT Response	Sufficiency of Existing KPI Tracking
	Email/Newsletters: 9 emails with links, open rate, and click-throughs **Outreach events**: 7 events expected years 2025–2027	
Number of final report downloads	The Program Team started collecting Final Report download data on June 20, 2025. Between June 20 and July 24, 2025, 225 Final Report files were downloaded by 193 users.	Sufficient tracking
Number and percentage of completed projects that result in a Codes and Standards recommendation	Zero / 0%	Sufficient tracking
Number and percentage of completed projects that result in measure package revisions or development of a new measure package	Number not specified / 22.2%	Sufficient tracking
Number of technologies and intervention strategies recommended for transfer compared to new measures adopted in the portfolio (Technology Transfer Rate)	0 for 2025 to date.	Sufficient tracking
Number of technologies and intervention strategies recommended for transfer compared to new measures adopted in the portfolio (Technology Transfer Rate)	Not provided	Insufficient, not currently available (though also likely not yet relevant)
Number of savings of measures currently in the portfolio that were supported by emerging technologies programs, added since 2021. Annual ex-ante with gross and net for all measures, with ex-post where available (ETP-T5)	Not provided	Insufficient, not currently available (though also likely not yet relevant)

Note: KPIs that involve additional data collection activities, such as surveys or interviews, are indicated with an asterisk (*).
[a] According to interviews, a subject matter expert (SME) is an individual with expertise-level knowledge about the technology.
[b] ETP projects are defined as one ETP study, demonstration, or test that may include one or more energy-efficient measures/technologies.
[c] A fully developed measure package includes all documentation required to support the integration and adoption of a technology into the IOU portfolio.

Table 11 lists the internal KPIs recommended by the 2024 evaluation, along with the associated data provided by the GET implementation team in August 2025 and the evaluation team's interpretations and recommendations.

Table 11. GET Internal KPIs Reported for 2025

Key Performance Indicators	GET Response	Evaluation Team Interpretation
Number and type of technology families identified for prioritization	Seven technology/end-use families: HVAC Process Loads Water Heating Whole Building Miscellaneous Appliances, and Commercial Foodservice	Sufficient tracking
Number of SMEs consulted with for each technology family[a]	6	Insufficient, begin tracking SMEs by technology family or end use
Number of outreach attempts by channel with developers of energy efficiency products (in whole or in part) that are less than five (5) years from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs) (ETP-M5)	Idea Submissions: 4 Identified During Projects: 8 Other Ideas Identified During Scoping: 4	Insufficient, cited outreach channels would benefit from clarification
Percentage of unique ideas that move to project scoring by technology family (Idea Evaluation Approval Rate)	HVAC: 0% Process Loads: 50% Water Heating: 100% Whole Building: 100% Miscellaneous: 100% Appliances: 0% Commercial Food Service: 66%	Sufficient tracking
Number of total project idea submissions	17	Sufficient tracking
Number and percentage of submissions that align with Technology Priority Map priorities	2 / 88%	Sufficient tracking
Stakeholder satisfaction with the project submission process (Idea Submission Process Satisfaction)*	Not currently tracked	Insufficient, explore opportunities to solicit this feedback from project submitters
Number of projects initiated (broken out by Technology Support Research, Technology Development Research, and Focused Pilots)[b] (ETP-M3)	TSR: 2 TDR: 0 Focused Pilots: 1	Sufficient tracking
Number of Technology Focused Pilots initiated as part of the Technology Focused Pilot Technology Priority Map (ETP-M7)	0	Sufficient tracking, but not yet relevant
Number of projects initiated with cooperation from other internal IOU programs associated with each Focused Pilot[b] (ETP-M6)	1	Sufficient tracking
Number of technology recommendations and intervention strategies provided	0	Sufficient tracking, but not yet relevant
Number and percentage of codes and standards recommendations presented	0	Sufficient tracking, but not yet relevant
Number and percentage of measure packages initiated	Not currently tracked	Insufficient, not currently available
Number and percentage of measure packages developed[c]	Not currently tracked	Insufficient, not currently available

Key Performance Indicators	GET Response	Evaluation Team Interpretation
Number of Technology Priority Maps initiated, including one Focused Pilot Technology Priority Map (ETP-M1)	Updates to two TPMs issued in 2025 Focused Pilot is not applicable	Sufficient tracking
Number of Technology Priority Maps updated (ETP-M2)	2 updated TPMs for 2025 to date.	Sufficient tracking
Percent of project submitters aware of Technology Priority Map priorities*	Not currently tracked	Insufficient, explore opportunities to solicit this feedback from project submitters
Number of approved and discontinued project submissions (including the number of projects discontinued due to misalignment with Technology Priority Map priorities)	Projects approved in 2025: 7 Projects discontinued due to misalignment with TPM priorities: 0	Sufficient tracking
Number of total project submissions received	9 total received	Sufficient tracking
Number and percentage of project submissions that align with Technology Priority Map priorities	Not currently tracked	Insufficient, not currently available
Number and percentage of approved, deferred, and discontinued project submissions (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (Technology Projects Discontinued) Number and percentage of completed projects[b] (broken out by Technology Support Research, Technology Development Research, and Focused Pilots)	**Approved:** TSR: 2 / 29% TDR: 0 / 0% Focused Pilots: 1/14% **Deferred:** TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0% **Discontinued:** TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0% **Completed:** TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0%	Sufficient tracking
Number and percentage of final reports completed (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (Technology Project Final Reports)	TSR: 0 / 0% TDR: 0 / 0% Focused Pilots: 0 / 0%	Sufficient tracking
Number of dissemination activities conducted by channel (i.e., webinars, conferences, LinkedIn posts, email campaigns)	In 2025, through 8/1: Webinars: 5 Conferences: 4 LinkedIn Postings: 8	Sufficient tracking.
Number of final report downloads	Not able to collect due to not managing the sites where final project reports are posted	Insufficient, not currently available

Key Performance Indicators	GET Response	Evaluation Team Interpretation
Number and percentage of completed projects that result in a Codes and Standards recommendation	0 / 0%	Sufficient tracking, but not yet relevant
Number and percentage of completed projects that result in measure package revisions or development of a new measure package	0 / 0%	Sufficient tracking, but not yet relevant
Number of technologies and intervention strategies recommended for transfer compared to new measures adopted in the portfolio (Technology Transfer Rate)	0	Sufficient tracking, but not yet relevant
Number of savings from measures currently in the portfolio that were supported by emerging technologies programs, added since 2021. Annual ex-ante with gross and net for all measures, with ex-post where available (ETP-T5)	Not provided	Insufficient, not currently available (though also likely not yet relevant).

Note: KPIs that involve additional data collection activities, such as surveys or interviews, are indicated with an asterisk (*).
[a] According to interviews, a subject matter expert (SME) is an individual with expertise-level knowledge about the technology.
[b] ETP projects are defined as one ETP study, demonstration, or test that may include one or more energy-efficient measures/technologies.
[c] A fully developed measure package includes all documentation required to support the integration and adoption of a technology into the IOU portfolio.

We also reviewed publicly available reports posted to the CalNEXT and GET websites to characterize recent project completions. Since the start of the current 2024-2027 program cycle, both CalNEXT and GET completed projects covering a range of technology areas, including a total of 88 CalNEXT projects[52] and 10 GET projects[53] completed in 2024 and 2025. For each program, technology areas shown here are defined by the respective programs' TPMs. Table 1 summarizes the count of projects completed by program and technology area.

Table 12. Summary of Recently Completed ETP Projects (2024/2025)

Technology Area	CalNEXT	GET
HVAC	31	2
Water Heating	18	12
Whole Building	25	3
Process Loads	21	8
Lighting, Plug Loads & Appliances	8	3
Commercial Food Service	0	2
Miscellaneous	0	1
Total[a]	**88**	**21**

[a] Totals do not reflect the sum of values shown because some projects are affiliated with multiple technology areas.

[52] https://calnext.com/approved-projects/
[53] https://cagastech.com/iget/projects

5. CONCLUSIONS AND RECOMMENDATIONS

Based on the study findings, we offer the following conclusions and associated recommendations.

- **Conclusion: ETP tracking and reporting of program outcomes capture most but not all of the internal KPIs recommended by the 2024 evaluation.** Processes in place to track program outcomes remain largely unchanged since the original SW 3P contracts in 2021 and 2022, reflecting policy-defined metrics in place at the time. During initial 3P contract development, CPUC Decision 18-05-041 represented the latest required ETP reporting metrics.[54] A series of policy decisions subsequently updated required metrics and indicators in 2023 and 2024 before Resolution E-5351 passed in June 2025, ultimately converting most of the previous ETP metrics to indicators while removing a few others.[55] In addition, the 2024 ETP Process and Effectiveness Evaluation recommended newly established internal KPIs to demonstrate intended program theory-driven outcomes, around half of which were either existing or adjusted versions of metrics already being tracked at the time. However, these evaluation recommendations did not undergo a formal response-to-recommendations process or get incorporated into policy language.[56] The CalNEXT and GET program teams acknowledged that metrics updates were not a priority in 2025 but may benefit from prioritization going forward. Currently available data provided by each implementation team in Q3 2025 sufficiently tracks most of the recommended KPIs for both CalNEXT (24 of 29 sufficiently tracked) and GET (20 of 29 sufficiently tracked).
  - **Recommendation:** Begin comprehensively tracking and annually reporting all ETP indicators outlined by Resolution E-5351 using the specified Excel template and including links to programmatic information and data to adhere to latest applicable policy-defined reporting requirements.
  - **Recommendation:** Adopt practices necessary to sufficiently track and report annually on all internal KPIs recommended by the 2024 evaluation (e.g., maintain consistent and regularly updated records of applicable activities, project categories, and project outcomes) to ensure both CalNEXT and GET can fully demonstrate their accomplishments and progress toward program theory-based objectives.[57] These metrics should be documented by program implementers and reviewed by PAs on an annual basis, allowing them to be shared externally upon request by evaluators or other relevant parties.
- **Conclusion: CalNEXT implemented efforts to formalize the technology transfer processes and define potential project outcomes that extend beyond direct transfer of technologies to the energy efficiency portfolio.** The new technology transfer guidance framework includes expanded definitions of technology transfer pathways and places emphasis on anticipated project outcomes as part of project proposal and planning templates. The newly formed technology transfer pathways encompass eight possible categories, including tool development and additional research needs, along with the more traditional intended ETP outcomes of measure package development or revision. In general, this updated framework and documentation are well-aligned with both the 2024 evaluation recommendations that program implementers and PAs work together to collectively define and clarify technology transfer responsibilities and activities, as well as input from program staff and stakeholders gathered as part of the current evaluation regarding the need for flexibility and expanded definitions of intended ETP project

[54] California Public Utilities Commission. (May 2018). *Decision 18-05-041.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M215/K706/215706139.PDF

[55] California Public Utilities Commission. (June 2023). *Decision 23-06-055.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M512/K907/512907396.docx; CAEECC Facilitation Team. (March 2024). *CAEECC Equity and Market Support Working Group Final Report.* https://www.caeecc.org/_files/ugd/849f65_811eb0401da74baebe65034d82232234.pdf; California Public Utilities Commission. (June 2025). *Resolution E-5351.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M569/K136/569136233.pdf

[56] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Prepared by Opinion Dynamics. Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view.

[57] Notably, project outcomes and technology transfer activities may not always be directly measurable or definitively tied to ETP research that helped inform them and may therefore be underrepresented by ongoing efforts to track eventual outcomes.

outcomes. The new technology transfer framework provides a valuable shared point of reference for all parties involved and serves as a template for future input from key stakeholders to continue refining expectations for project outcomes and maximize alignment with CPUC policy objectives.

- **Recommendation:** Highlight the newly developed technology transfer guidance to potential project submitters via the CalNEXT website and in future outreach efforts, emphasizing the importance of clearly defined expectations for technology transfer outcomes in the project proposal and planning phase, as outlined in the new framework.
- **Recommendation:** Continue gathering feedback to further refine and clarify newly established technology transfer pathways by facilitating feedback-oriented discussions as part of upcoming Energy Transition Coordinating Council (ETCC) Summits and meetings with closely engaged parties such as IOU staff and core partners. This topic may also represent a valuable focus area for future evaluation to determine the degree to which updated information reaches the intended audience and has the desired effect on project outcomes.
- **Recommendation:** GET program staff should consider adopting or selectively incorporating technology transfer pathway definitions and associated project planning guidance established by the CalNEXT framework to help clarify anticipated technology transfer outcomes for both internal and external reference and further emphasize those outcomes in project planning.

- **Conclusion: CalNEXT and GET implementation teams take differing approaches to soliciting project ideas from external submitters, yet both programs face similar challenges associated with transparency and clarity of expectations.** In most cases, the implementation team and core partners already engrained in program processes initiate project ideas and lead planning and implementation. The CalNEXT team does conduct ongoing outreach to potential project submitters, while the GET team focuses more on iterative development of project ideas with their PA and core partner. External submitters seeking to propose project ideas often pointed to challenges understanding expectations for new project proposals and expressed an interest in receiving more context, guidance, and communication during the early stages of proposal development and review. This feedback suggests there may be opportunities to strengthen and expand the current approach to engaging with external submitters to help welcome a broader diversity of new partners and ideas.
  - **Recommendation:** Both CalNEXT and GET implementation teams should ensure potential project submitters have access to introductory information regarding key considerations, processes, and timelines involved in project planning and review, including clear and timely feedback and regular status updates or live tracking of pending proposals. CalNEXT staff should enhance and highlight existing information available on the program's website and incorporate additional details regarding review processes into existing guidance documentation. GET staff should prioritize proactive outreach via existing channels (e.g., newsletters, social media campaigns, industry events, and conferences) in concert with additions to the GET website and publicly available materials to help make more accessible and informative, thus encouraging project submissions organizations less familiar with program expectations.
- **Conclusion: CalMTA and the ETP represent closely related but distinct roles in the California energy efficiency market landscape.** While the ETP focuses on research aimed at demonstrating the feasibility of emerging technologies' market adoption and inclusion in the energy efficiency portfolio, CalMTA focuses on enacting strategies to promote the adoption of market-ready technologies. By definition, the ETP focuses on end uses in earlier stages of development and market readiness. As such, CalMTA can directly benefit from ETP research regarding early-stage technologies to help understand the viability of those technologies for future MTIs, much in the same way that ETP research is meant to inform technologies' feasibility for the energy efficiency portfolio. In creating the CalMTA, CPUC policy mandated they "minimize redundancy in the market" and actively avoid duplicating work. This placed the responsibility on CalMTA staff to find suitable ways to coordinate and develop MTIs that complement but do not directly overlap with ETP or other ratepayer-funded programs. However, the November 2025 CPUC Decision (D. 25-11-023) highlighted the need for active coordination between energy

efficiency programs and CalMTA in cases where potential overlap exists and defers to the energy efficiency portfolio on how to operationalize those processes.[58]

- **Recommendation:** Close coordination between ETP and CalMTA can help improve information-sharing practices and establish more direct communication between ETP program teams and CalMTA staff. CalNEXT program staff should continue regularly meeting with CalMTA staff and establish a communication and data sharing plan that outlines responsibilities and expected timing for fulfilling CalMTA requests.

- **Conclusion: The DOE ARL framework represents a valuable and well-established point of reference for operationalizing and defining commercialization.** The concept of commercialization is central to determining how individual technologies qualify for consideration within the ETP's framework and is explicitly referenced by existing policy-defined indicators. The 2024 ETP Process and Effectiveness Evaluation recommended establishing a more concrete shared definition of commercialization to help guide project idea submissions, inform scoring of project proposals, and enable more accurate tracking of select reporting indicators and KPIs.[59] The DOE ARL framework relies on two mutually exclusive scales accounting for both technical and non-technical market barriers to establish whether a given technology is considered market-ready.
  - **Recommendation:** ETP program teams should consider incorporating the DOE ARL framework into the program's lexicon and project proposal and planning considerations, given it may serve as a valuable point of reference for program staff, stakeholders, and project submitters. While it is not necessary to systematically apply the full framework in every context, establishing a more explicit shared understanding of how to define commercialization can help inform ongoing project development and screening, as well as efforts to accurately track and report on ETP progress and outcomes.
- **Conclusion: Both CalNEXT and GET maintain close alignment of prioritized technologies with CPUC decarbonization and energy-efficiency policy objectives via regular updates to TPMs with input from IOUs and statewide stakeholders.** CalNEXT and GET implementation plans and TPMs highlight the importance of research that establishes feasibility for adoption into the energy efficiency portfolio, and projects often explicitly address reliability and affordability as key barriers and considerations for technologies' future potential.
  - **Recommendation:** Continue regularly updating TPMs and soliciting input from IOUs and statewide stakeholders to ensure priorities remain aligned with the latest needs of the energy efficiency portfolio.

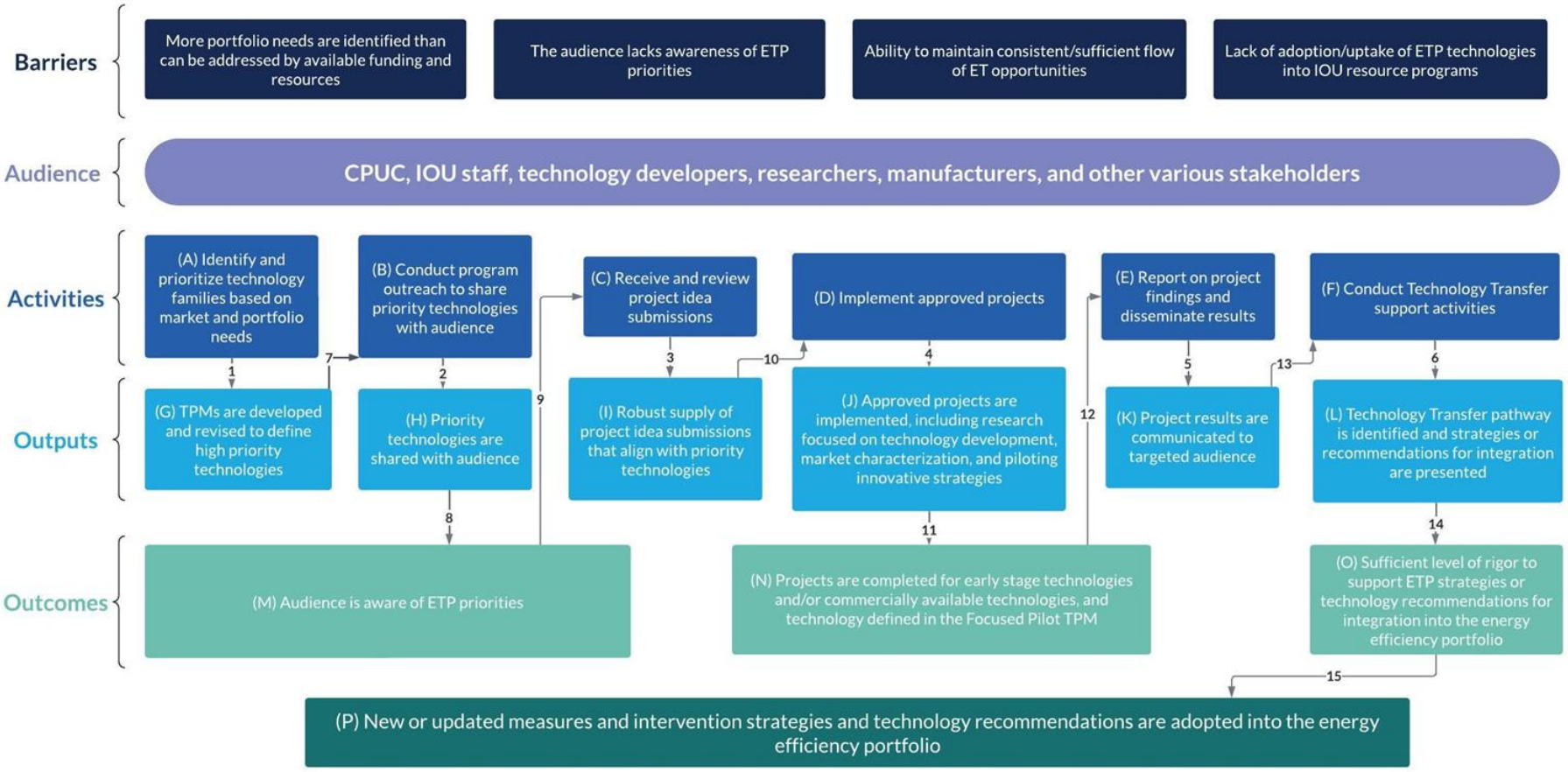
[58] California Public Utilities Commission. (November 2025). *Decision 25-11-023.* https://docs.cpuc.ca.gov/PublishedDocs/Published/G000/M588/K645/588645495.PDF

[59] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Prepared by Opinion Dynamics. Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view.

APPENDIX A. 2024 EVALUATION-RECOMMENDED PTLM AND KPIS

In 2024, Opinion Dynamics evaluated the recently launched 3P ETP and recommended actions to improve future evaluability and implementation effectiveness.[60] The 2024 evaluation included development of a revised program theory logic model (PTLM) recognizing the unified core theory behind both CalNEXT and GET and establishing a refined the list of internal KPIs to demonstrate intended program theory-driven outcomes. Figure illustrates the PTLM established by the 2024 evaluation.

Figure 13. Statewide ETP PTLM from 2024 Evaluation



Note, numbered linkages are directly mapped to associated KPIs meant to demonstrate progress toward each intended output.

[60] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view

The 2024 ETP Process and Effectiveness Evaluation also proposed internal KPIs to demonstrate intended program theory-driven outcomes.[61] Each KPI is directly associated with a specific link appearing in the PTLM. The KPIs in Table 13 are color-coded using the following logic:

- **Black** indicates existing KPIs that were planned to be tracked by at least one of the ETPs' implementation staff and require no changes for future tracking;
- **Green** represents KPIs recommended by the evaluation team that were not included in the program implementation plans but were recommended to be collected by implementation staff; and
- **Blue** denotes KPIs that at least one ETP had already planned to track, at least partially, but the evaluation team recommended additional details and/or revised tracking.

When a column indicating ETP-specific recommendations is blank, the associated ETP already tracks the KPI, and the evaluation team has no further recommendations.

Table 13. Recommended KPIs Based on Revised SW ETP PTLM

PTLM Link	Key Performance Indicators	Recommended for CalNEXT	Recommended for GET	Reasoning for Recommendation
1	Number and type of technology families identified for prioritization	●	●	Track to ensure programs identify the range of technology priorities.
	Number of SMEs consulted with for each technology family[a]	●	●	Track to ensure stakeholders provide input on each prioritized technology.
2	Number of outreach attempts by channel with developers of energy efficiency products (in whole or in part) that are less than five (5) years from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs) (ETP-M5)	●	●	Track the reach of outreach efforts by channel.
3	Percent of unique ideas that move to project scoring by technology family (Idea Evaluation Approval Rate)	●	●	Track the technologies in project submissions and assess the rate at which projects focused on different technology families are approved. Align terms with descriptions used by program staff.
	Number of total project idea submissions	●	●	Together, these KPIs enable tracking of the rate of project submissions that align with identified program priorities.
	Number and percent of submissions that align with Technology Priority Map priorities	●	●	
	Stakeholder satisfaction with the project submission process (Idea Submission Process Satisfaction)*	●	●	Add to GET to track changes in stakeholder satisfaction with the project submission process.

[61] California Emerging Technology Program (ETP) Process and Effectiveness Evaluation Report (2024). Delivered to California Public Utilities Commission (CPUC) September 13, 2024. https://pda.energydataweb.com/#!/documents/4034/view

PTLM Link	Key Performance Indicators	Recommended for CalNEXT	Recommended for GET	Reasoning for Recommendation
4	Number of projects initiated (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (ETP-M3)[b]	●	●	KPI revisions will enable tracking of the number of projects initiated by project type.
	Number of Technology Focused Pilots initiated as part of the Technology Focused Pilot Technology Priority Map (ETP-M7)	●	●	No new metrics suggested for tracking.
	Number of projects initiated with cooperation from other internal IOU programs associated with each Focused Pilot (ETP-M6)[b]	●	●	No new metrics suggested for tracking.
5	Number of outreach attempts by channel with developers of energy efficiency products (in whole or in part) that are less than five (5) years from commercialization (where developers include new technology vendors, manufacturers, and entrepreneurs) (ETP-M5)	●	●	To track dissemination outreach efforts by channel.
6	Number of technology recommendations and intervention strategies provided	●	●	Together, these KPIs enable tracking of the rate at which project results support different technology transfer activities.
	Number and percent of codes and standards recommendations presented	●	●	
	Number and percent of measure packages initiated	●	●	
	Number and percent of measure packages developed[c]	●	●	
7	Number of Technology Priority Maps initiated, including one Focused Pilot Technology Priority Map (ETP-M1)	●	●	No new metrics suggested for tracking.
	Number of Technology Priority Maps updated (ETP-M2)	●	●	No new metrics suggested for tracking.
8	Percent of project submitters aware of Technology Priority Map priorities*	●	●	To track efforts to communicate priority technologies to the audience.
	Number of approved and discontinued project submissions (including the number of projects discontinued due to misalignment with Technology Priority Map priorities)	●	●	Assess alignment of projects with program priorities and track rate of approved vs. discontinued projects.
9	Number of total project submissions received	●	●	To track rate of project submissions.
	Number and percent of project submissions that align with Technology Priority Map priorities	●	●	Track to determine the percent of project submissions that align with TPM priorities. This will also enable monitoring the reach of program outreach efforts.

PTLM Link	Key Performance Indicators	Recommended for CalNEXT	Recommended for GET	Reasoning for Recommendation
10	Number and percent of approved, deferred, and discontinued project submissions (broken out by Technology Support Research, Technology Development Research, and Focused Pilots)[d] (Technology Projects Discontinued)	●	●	Revising the existing KPI will enable CalNEXT to monitor the rate of all project review outcomes by project type. Tracking this KPI will allow GET to monitor the outcomes of project reviews by project type.
11	Number and percent of completed projects (broken out by Technology Support Research, Technology Development Research, and Focused Pilots)[b]	●	●	To track the rate at which different project types are implemented.
12	Number and percent of final reports completed (broken out by Technology Support Research, Technology Development Research, and Focused Pilots) (Technology Project Final Reports)	●	●	To track the rate at which different project types are completed, and results are reported.
13	Number of dissemination activities conducted by channel (i.e., webinars, conferences, LinkedIn posts, email campaigns)	●	●	To monitor dissemination efforts and track prevalence of different dissemination modes.
	Number of final report downloads	●	●	Tracking enables the ability to assess effectiveness of dissemination activities and monitor audience interest in project results.
14	Number and percent of completed projects that result in a Codes and Standards recommendation[b]	●	●	Track to determine the rate at which ETP projects result in readiness for a Codes and Standards update and are recommended as such.
	Number and percent of completed projects that result in measure package revisions or development of a new measure package[b]	●	●	Track to determine the rate at which ETP projects result in a new or revised measure package.
	Number of technologies and intervention strategies recommended for transfer compared to new measures adopted in the portfolio (Technology Transfer Rate)	●	●	Revise CalNEXT KPI to enable tracking the transfer rate for both technology and intervention strategy recommendations. Monitor the extent to which technology transfer is occurring for each recommendation supported by a GET project.

PTLM Link	Key Performance Indicators	Recommended for CalNEXT	Recommended for GET	Reasoning for Recommendation
Tracking KPIs associated with link 15 (including the KPI that also applies to link 14) is dependent on the adoption of ETP-supported measures into the energy efficiency portfolio.				
15	Number of technologies and intervention strategies recommended for transfer compared to new measures adopted in the portfolio (Technology Transfer Rate)	●	●	Revise CalNEXT KPI to enable tracking the transfer rate for both technology and intervention strategy recommendations. Monitor the extent to which technology transfer is occurring for each recommendation supported by a GET project.
	Number of savings of measures currently in the portfolio that were supported by emerging technologies programs, added since 2021. Annual ex-ante with gross and net for all measures, with ex-post where available (ETP-T5)	●	●	In 2021, CalTF added flags to the eTRM and/or CEDARS to help identify ETP-supported measures, but not retroactively. Revise KPI to reflect tracking capabilities.

Note: KPIs that involve additional data collection activities, such as surveys or interviews, are indicated with an asterisk (*).

[a] According to interviews, a subject matter expert (SME) is an individual with expertise-level knowledge about the technology.

[b] ETP projects are defined as one ETP study, demonstration, or test that may include one or more energy-efficient measures/technologies.

[c] A fully developed measure package includes all documentation required to support the integration and adoption of a technology into the IOU portfolio.

[d] Although CalNEXT planned to partially track this information, the full KPI is coded with blue text due to the extent of revisions.

APPENDIX B. DRAFT REPORT PUBLIC COMMENTS AND RESPONSES

Table 14 includes all public comments received on the draft report along with evaluation team responses. We received comments from Southern California Edison (SCE), Southern California Gas (SoCalGas), and Energy Solutions between April 27 and May 11, 2026.

Table 14. Draft Report Public Comments and Responses

Source	Section	Public Comment	Response
SCE	General Comments	Several conclusions and proposed KPIs appear to assume a direct linkage between ETP outputs and portfolio adoption. Given ETP's role as a market support program, it is outside ETP scope to dictate the development of a measure package or implementation of technology into a program.	While the ETP is not responsible for developing measure packages or implementing measures into resource acquisition programs, it is tasked with designing and facilitating research intended to support this target outcome (among other technology transfer pathways newly introduced by CalNEXT in 2025). As such, it is important that the ETP offering attempt to capture these outcomes where possible to help demonstrate its role in supporting the broader EE Portfolio.
SCE	General Comments	While improving tracking of technology transfer is valuable, the report may underestimate the inherent lag and indirect nature of these outcomes. Please consider acknowledging that many ETP impacts are qualitative or realized outside program timelines, and may not be fully captured through KPIs.	Revised to acknowledge that not all technology transfer outcomes may be directly or immediately measurable and may therefore be underrepresented by ongoing tracking efforts. This commentary is now included as part of discussion of technology transfer activities (page 28) internal KPI tracking (page 37), and the conclusion regarding tracking and reporting efforts (pages 7 and 44).
SCE	Research Objectives and Approach (page 6)	SCE does not support the recommendation to include parties responsible for downstream technology transfer (e.g., CalTF measure committee, evaluators) during the project development stage, as there is potential to introduce bias when reviewing project proposals. This may conflict with ETP's role as a technology-agnostic program focused on objectively assessing emerging technologies, including technologies that may not yet have defined pathways for integration. The CalTF website already includes the guidelines on requirements that need to be met to submit a measure package for screening and development.	The evaluation team appreciates this feedback and agrees with the importance of ensuring an objective process for project ideation, planning, and development. However, it is not immediately clear how engaging additional parties to inform project planning would inherently bias that process. Notably, the text referenced here is a condensed summary of a recommendation from the 2024 ETP Evaluation. We have revised to include a footnote on page 6 acknowledging that such engagement could entail requesting targeted input on specific elements relating to measure package or evaluability considerations rather than relying on these parties' input to inform technology selection or project approval.

Source	Section	Public Comment	Response
SCE	1.3 Conclusions and Recommendations (page 7)	The recommendation to comprehensively track all PTLM based KPIs may not be fully feasible within the current ETP's structure, as several KPIs depend on downstream portfolio adoption decisions and actions by external parties (e.g., IOU program staffs, CalTF, CPUC). Please consider clarifying which KPIs are within ETP's direct control, so it could properly measure the performance of the program.	As detailed in Section 4.8.2 and acknowledged in Sections 1.3 and 5, ETP staff have already demonstrated the ability to track nearly all recommended internal KPIs, and Energy Solutions staff acknowledged that they do routinely follow up on outcomes biannually following dissemination of results. Ultimately, gathering info on technology transfer outcomes is often a necessary step to determine whether CalTF, IOU staff, or other parties responsible for target outcomes were able to make use of ETP-disseminated findings as anticipated. While some of those outcomes extend beyond the control of ETP staff, ETP efforts are designed in support of these outcomes and understanding these end results remains critical to tracking the overall contribution and influence of ETP efforts on the broader EE Portfolio.
SCE	1.3 Conclusions and Recommendations (page 8)	Given the program timeline, SCE does not support that this recommendation would be as helpful as intended at this time. Additional time and resources will be required to properly review technologies and assign a TRL or ARL, which could introduce confusion or project delays from submitters, scoring and screening team, and project reviewers. SCE recommends that the program team consider this ARL as background information (e.g. whether technology is commercially available and likely to be adopted) but not have a value assigned to it for the remaining of the program.	The evaluation team agrees it is not necessary to globally assign TRL or ARL values and that the DOE framework should serve as background information to inform commercialization distinctions. As currently written, this recommendation states that it is not necessary to systematically apply the full framework and that program staff consider using the it as a point of reference to help inform shared understanding of how to define commercialization, all of which aligns with SCE's suggestions on this matter.
SCE	1.3 Conclusions and Recommendations (page 8), 4.6 CalMTA Engagement (page 29)	SCE respectfully requests the statement regarding "a late 2025 policy decision placed the onus on energy efficiency programs to initiate coordination with CalMTA in cases where potential overlap exists and defers to the energy efficiency portfolio on how to operationalize those processes" to be modified. On page 52 of the Decision 25-11-023 stated that other interventions in individual portfolios should be coordinated with CalMTA's MTIs, as much as CalMTA should also coordinate with the other administrators and programs. Additionally, the statement that the decision granted CalMTA "primacy" should be modified to reflect that the issue of primacy is deferred to the Energy Efficiency rulemaking R25-04-010. SCE requests a modification to this sentence for clarity and consistency.	Revised to include added context from page 52 of Decision 25-11-023 and adjusted language on pages 8 and 47 to better align with how policy language addressed comments provided there by Energy Solutions. We also agree that the operationalization of primacy in this context was deferred to R25-04-010, as indicated in existing text on page 29 and in associated conclusions.

Source	Section	Public Comment	Response
SCE	4.6 CalMTA Engagement (page 30)	SCE respectfully requests the statement "CalMTA staff mentioned they provided additional funding to one existing CalNEXT project and anticipated doing so would support some degree of enhanced data sharing" to be verified in the report.	The evaluation team confirms this aligns with feedback provided by CalMTA staff, who indicated the following: "CalNEXT is doing some work on a project, and we added additional funding to collect additional data, and the assumption was we would all commingle data…and that's where we saw the breakdown." We have incorporated a footnote regarding the possibility of a misunderstanding between parties on this point, as implied by this comment and indicated by a similar comment from Energy Solutions included below.
SoCalGas	1.3 Conclusions and Recommendations (page 8)	The GET program proactively solicits project ideation through its website, email distributions, and social media platforms such as LinkedIn. The program also engages stakeholders by participating in industry conferences, presenting project findings, and hosting regular webinars. In addition, it plays an active leadership role in the annual Emerging Technologies Conference, including the design and delivery of gas-focused sessions. However, this recommendation appears to overlook key differences between the gas and electric ETPs with respect to available technologies and program funding. The GET budget, including marketing resources, is smaller than CalNEXT, which limits the scale of outreach efforts.	The evaluation team recognizes the difference in budgets between CalNEXT and GET as a driver of available marketing resources, as well as the presence of public-facing program information on the GET website and via other channels mentioned here. Still, the limited recent engagement from external submitters and feedback from implementation partners suggests a need for more accessible information on the website and in program materials, as well as the importance of proactive outreach to potential new project contributors. We have revised this recommendation on pages 8 and 46 to clarify the suggestion is to prioritize and build on existing outreach and public-facing information.
SoCalGas	Table 1 (page 4)	SoCalGas believes that table 1 is misleading and seems to not accurately count number of GET projects completed in 2024 and 2025. SoCalGas recommends either removing Table1 or including the table below for clarification in the report. For clarification, the GET has projects that began in prior years that were completed in 2024 and 2025 and those appear to not be counted. [TABLE PROVIDED] In Table 1 and Table 12, CalNEXT has "N/A" applied to technology areas with which they do not interface, while GET is displayed as zero. For Commercial Food service and Miscellaneous, the CalNEXT value should be displayed as zero since these are categories available for evaluation in the electric ETP	Revised to reflect updated GET project counts provided by SoCalGas and to standardize use of zeroes in place of N/A for Table 1 and Table 12.
SoCalGas	4.2.2 Technology Focused Pilots (page 20)	To be required and adequately evaluated, Technology Focused Pilots should be defined by Commission decision or resolution. SoCalGas is not aware of any such regulatory language. Evaluation of the TFP process should refer to a CPUC definition of the process. The definition that the evaluation relies upon cites a CalNEXT report, but no formal definition from the Commission.	The evaluation team recognizes that existing CPUC policy may not fully define the role of Technology Focused Pilots (despite being acknowledged as part of R E-5351 in the context of required ETP reporting indicators), and we have revised to include a footnote on page 20 regarding the potential for future policy clarification.

Source	Section	Public Comment	Response
SoCalGas	GET (page 21)	GET had multiple several ongoing TFPs projects in 2025, including gas absorption heat pumps and CarbinX, and three targeted areas “GAHP Pool Heating” , “Direct Air Capture” and “Efficient Lox Nox Burners” that were intended to be potential TFPs for 2025; however all three had external issues that kept them from becoming TFPs in 2025.	Revised to acknowledge ongoing development of these potential TFPs not formally initiated in 2025 due to external factors.
SoCalGas	GET (page 24)	The GET program got submittals from three parties beyond ICF and Lincus.	Revised to reference three instead of two external submitters in 2025.
SoCalGas	Figure 11 (page 30)	The phrase “Conducted over a one-to-three-year timeframe” refers to a single ETP project, however, the comparison between ETP and CalMTA is discussing technologies. ETP research into a technology can span multiple projects with a single project being a market study, then following up with a new project being a lab test on the technology, and next a project that is a field test of the technology. Altogether research into a single technology can span multiple ETP projects and last 5-7 years.	Revised to include table footnote regarding the possibility of multiple projects examining a given technology over a longer time period.
SoCalGas	GET (page 31)	While SoCalGas appreciates that CalMTA prioritizes the TSB component for evaluation, CalMTA fails to recognize that gas-to-gas measures typically have higher TSBs in comparison to electric-to-electric measures. Because of affordability concerns, many customers may decline to perform more costly gas-to-electric fuel substitution measures, especially in Disadvantaged Communities. We believe that this exclusionary approach restricts certain communities from benefiting from their investment in the CalMTA initiative.	Revised to acknowledge SoCalGas feedback on the presence of gas-to-gas measures with high TSBs relative to electric-to-electric measures, and cost restrictions sometimes associated with gas-to-electric fuel substitution.
SoCalGas	4.7 Definition of Commercialization (page 31)	The five years from commercialization is not rigid and SoCalGas may consider supporting technologies that are commercialized but not well adopted.	Revised to acknowledge this feedback on page 32.
SoCalGas	Table 12 Summary of recently completed ETP projects (page 43)	Table 12 is same table as Table 1 above. See comments there on incorrect GET project and technology area counts and inconsistent use of N/A and zeros between the two programs. SoCalGas believes the following table is the correct representation of what was completed.	Revised both Table 1 and Table 12 to align with this feedback, as noted on earlier comment.
SoCalGas	Appendix A (page 47)	SoCalGas recommends removing Appendix A, since the CPUC had the chance to implement the PTLM and updated KPIs in decision E-5351, but declined to.	Appendix A serves primarily as a reference to provide context for the current report and background on previous evaluation-recommended internal KPIs which are explicitly not required by CPUC policy decisions, but recommended for the ETP’s benefit to extend slightly beyond required metrics and capture core target outcomes established by collaborative efforts between parties during the 2024 evaluation cycle.

Source	Section	Public Comment	Response
Energy Solutions	General Comments	Several of the Recommendations do not align with CalNEXT's scope and budget. The report includes several recommendations that would require expansion beyond CalNEXT's current scope and available resources. These include, for example: • Integration of an Adoption Readiness Level (ARL) or similar framework (Section 4.7, p. 31) • Enhancements to provide real-time or near real-time tracking of Scanning & Screening submissions (Sections 4.5–4.6; p. 45) While Energy Solutions recognizes the potential value of these recommendations, we do note that implementation would require additional technical development, staffing, and ongoing maintenance that are outside of CalNEXT's current scoped activities and may be challenging to feasibly implement given the remaining timeframe of the program extension. However, Energy Solutions remains open to working with SCE to evaluate feasibility and prioritization through a future Response to Recommendations (RTR) process.	Note that the evaluation recommendation regarding use of the DOE ARL framework suggests that it is not necessary to systematically apply the full framework and that program staff should consider using as a shared point of reference to help conceptualize technology commercialization where needed. The evaluation team recognizes that real-time or near real-time tracking may not be immediately actionable or feasible for all projects within current implementation contracting, but we put the suggestion forward for future consideration, and as encouragement for the implementation teams to explore opportunities to improve visibility for project submitters into project review timing and staging.
Energy Solutions	4.3 Project Solicitation, Scanning, and Scoring	Section 4.5/4.6 (page 45) of the evaluation recommends "ensure potential project submitters have access to introductory information regarding key considerations, processes, and timelines involved in project planning and review, including clear and timely feedback and regular status updates or live tracking of pending proposals." Energy Solutions notes that CalNEXT currently provides substantial publicly available resources to support submitters, including: • Project review criteria • Scoring and submission timelines • Technology Priority Maps (TPMs) • Frequently asked questions (FAQs) These materials are intended to provide clear guidance on program expectations and processes. While additional enhancements to transparency may be considered over time, the program currently already offers resources to support participant engagement.	The evaluation team recognizes and acknowledges the presence of these valuable resources throughout respective sections of this report, and commends the CalNEXT implementation team on their continuing development of publicly available resources to support potential external submitters. We also maintain that additional transparency, emphasis of available resources, and consistent communication around project processes and timelines will further aid future project submitters and particularly improve the experience for those without prior program experience.

Source	Section	Public Comment	Response
Energy Solutions	4.6 CalMTA Engagement	The report indicates that CalMTA provided additional funding to an existing CalNEXT project, and associated requests from CalMTA for access to project data (pp. 30). Energy Solutions has no record of any co-funding agreements between CalMTA and CalNEXT for past or ongoing projects, and recommend the report be amended to clarify that point. In addition, any access to project data is subject to approval by SCE as the Program Administrator and governed by applicable non-disclosure agreements (NDAs), including requirements to protect sensitive customer information. Given the importance of accurately reflecting program governance, we recommend revising or removing this language to avoid mischaracterization.	See response to a similar comment from SCE included above. We have revised to include a footnote regarding the possibility of a misunderstanding or mischaracterization on this point, and would encourage continued dialogue between the parties involved around ongoing improvement of data sharing processes between ETP and CalMTA.
Energy Solutions	3.2 Program Staff Interviews	There is a typo on page 14, Section 3.2 Program Staff Interviews in which the phrase "GET programs" is duplicated in the following sentence: "In September and October 2025, the evaluation team conducted six qualitative interviews with PA, implementer, and IOU staff, including 3P implementers of the CalNEXT and GET programs GET programs, as well as contacts at each of the four California IOUs.	Revised, thank you for noting.

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