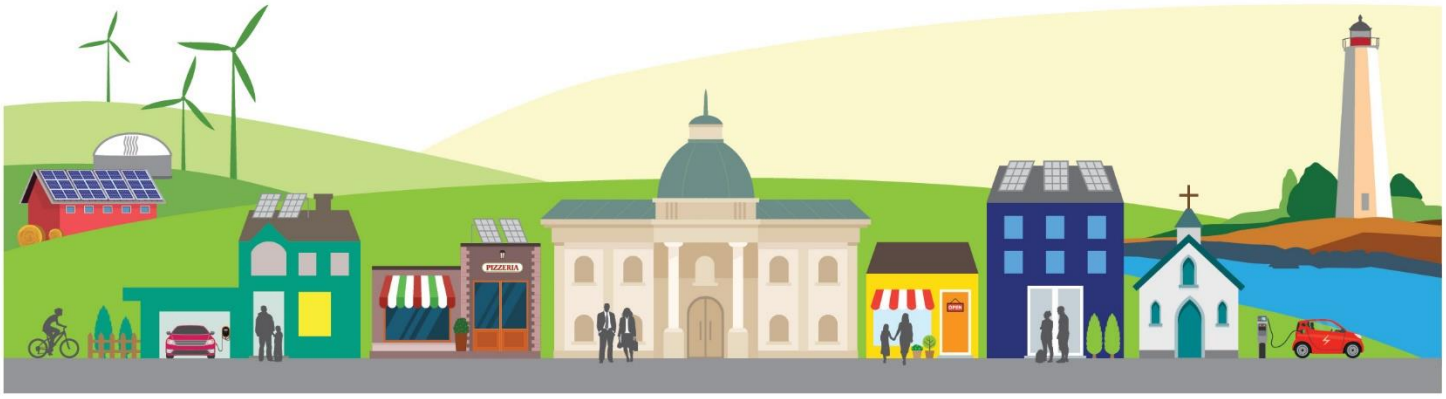
CONNECTICUT GREEN BANK®

Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors Meeting

MEETING DATE: WEDNESDAY, MARCH 19, 2025 • 1:30PM



The Green Bank Model

A Planet Protected by the Love of Humanity

1 Attract Private Investment by Leveraging Public Funding

Public Funding
Ratepayer dollars, taxpayer dollars

CONNECTICUT GREEN BANK

Private Investment
Individuals, credit unions, banks, bond buyers

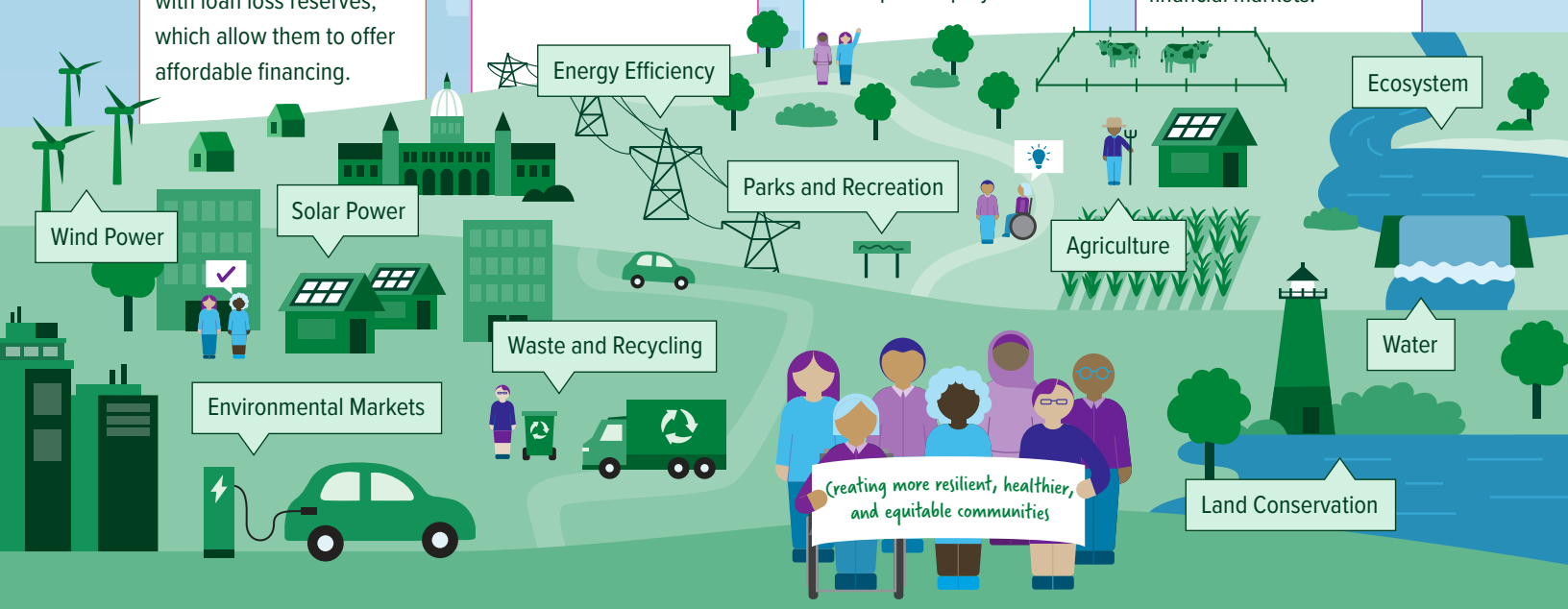
2 Apply Innovative Financial Tools to Deploy Investment Towards Our Mission

Generate **credit support** by providing local community banks with loan loss reserves, which allow them to offer affordable financing.

Initiate **co-investment** through public-private partnerships.

Support **performance-based incentives** to increase private investment and capital deployment.

Convert assets into **green bonds and notes** to be bought and sold in the financial markets.



3 Deliver Benefits to Connecticut's Families, Businesses, and Communities

Economic Development

- Creating thousands of jobs
- Generating millions in tax revenue

Ecological Resilience

- Driving environmental conservation, restoration, stewardship, and resilience

Energy

- Reducing energy burden by deploying clean energy
- Increasing energy security by deploying clean energy

Environmental Protection

- Reducing greenhouse gas emissions
- Improving the health of our residents by reducing air pollution

Equity

- No less than 40% of investment and benefits must reach vulnerable communities

CONNECTICUT GREEN BANK

Societal Impact Report

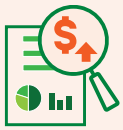
FY12 FY24

Since the Connecticut Green Bank's inception through the bipartisan legislation in July 2011, we have mobilized more than **$2.88 billion of investment** into the State's green economy. To do this, we used **$409.4 million** in Green Bank dollars to attract $2.47 billion in private investment, a leverage ratio of **$7.00 for every $1**. The impact of our deployment of renewable energy and energy efficiency to families, businesses, and our communities is shown in terms of economic development, environmental protection, equity, and energy (data from FY 2012 through FY 2024).*

ECONOMIC DEVELOPMENT

JOBS The Green Bank has supported the creation of more than **29,248** direct, indirect, and induced job-years.

TAX REVENUES
The Green Bank's activities have helped generate an estimated **$148.0** million in state tax revenues.



$56.4 million individual income tax

$58.0 million corporate taxes

$32.0 million sales taxes

$1.5 million property taxes

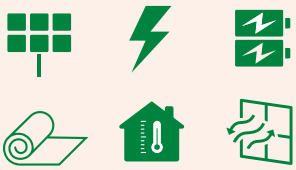
ENERGY

ENERGY BURDEN
The Green Bank has reduced the energy costs on families, businesses, and our communities.

63,300+
families

8,125+
businesses

DEPLOYMENT
The Green Bank has accelerated the growth of renewable energy to more than **707.2 MW** and lifetime savings of over **89.3 million MMBTUs** through energy efficiency projects.



ENVIRONMENTAL PROTECTION

POLLUTION The Green Bank has helped reduce air emissions that cause climate change and worsen public health, including **7.0** million pounds of SOx and **8.7** million pounds of NOx lifetime.

11.4 MILLION tons of CO_2 : EQUALS

172 MILLION tree seedlings grown for 10 years

OR

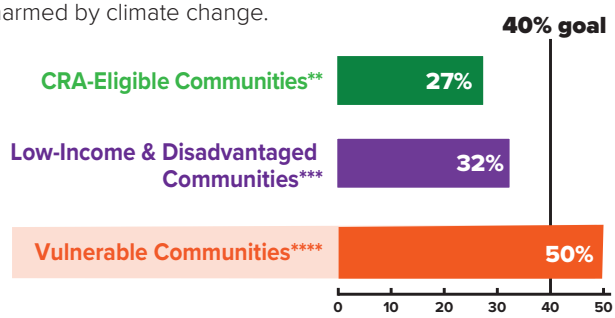
2.3 MILLION passenger vehicles driven for one year

PUBLIC HEALTH The Green Bank has improved the lives of families, helping them avoid sick days, hospital visits, and even death.

$218.9 – $494.9 million of lifetime public health value created

EQUITY

INVESTING in vulnerable communities, The Green Bank has set **goals** to reach **40% investment** in communities that may be disproportionately harmed by climate change.



** Community Reinvestment Act (CRA) Eligible Communities – households at or below 80% of Area Median Income (AMI)

*** Low-Income and Disadvantaged Communities – those within federal Climate and Economic Justice Screening Tool and Environmental Justice Screening Tool

**** Vulnerable Communities – consistent with the definition of Public Act 20-05, including low- to moderate-income communities (i.e., less than 100% AMI), CRA-eligible communities, and environmental justice communities (e.g., including DECD distressed communities)

* Includes projects, deployment, and investments approved, but not yet interconnected under Energy Storage Solutions.

Learn more by visiting ctgreenbank.com/strategy-impact/societal-impact/

Winner of the 2017 Harvard Kennedy School Ash Center Award for Innovation in American Government, the Connecticut Green Bank is the nation's first green bank.

Sources: Connecticut Green Bank Comprehensive Annual Financial Reports

Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors

Brenda Watson

Chair of Joint Committee

E: bwatson@northhartfordpartnership.org **P: 860-967-2751**

Brenda Watson is the newly appointed Executive Director of The North Hartford Partnership, a nonprofit organization dedicated to advancing equitable social and economic development in the North Hartford Promise Zone. The North Hartford Partnership's mission is to collaborate with neighborhood residents in efforts to close health, housing and economic opportunity gaps across North Hartford. Watson was appointed to the Board in February 2020 by Speaker of the House Joe Aresimowicz (D-Berlin/Southington).

John Harrity

Chair of BOC Committee

E: iamjh@sbcglobal.net **P: 860-459-5381**

John Harrity was the former President of the Connecticut State Council of Machinists – the electoral and legislative advocacy organization for more than 10,000 active and retired Machinists Union (IAM) members in Connecticut. The International Association of Machinists represents hourly workers at some of the state's largest industrial employers, including Pratt & Whitney, Hamilton Sundstrand, Electric Boat and Stanley Works, as well as a number of non-industrial worksites.
John is also the Chair of the Connecticut Roundtable on Climate and Jobs.

Lonnie Reed

Board Chair

E: Lonnie.Reed@ctgreenbank.com **P: 203-481-4474**

Joins on an as needed basis for quorum

Lonnie Reed serves as the Chair of the Green Bank's Board of Directors. Ms. Reed brings significant experience in environmental policy leadership, job creation, and a deep understanding of the climate challenges facing Connecticut. Reed served in the Connecticut State House of Representatives for five terms, from 2009 to 2019, before choosing not to run for reelection. She also served on the Bi-State NY & CT Long Island Sound Committee and helped lead the successful battle to stop Broadwater, a floating liquefied natural gas plant with a 22-mile pipeline proposed for Long Island Sound. Ms. Reed was appointed as Chair in October 2019 by Governor Ned Lamont.

Joint Committee of the CT EE Board and the Connecticut Green Bank Board of Directors Meeting Schedule

Wednesday, March 19th 2025
Thursday, June 18th 2025
Wednesday, September 24th 2025
Wednesday, December 17th 2025

*all meetings from 1:30pm-3:30pm

AGENDA

Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors

Online

March 19, 2025
1:30 pm – 3:30 pm

1. Call to Order
2. Public Comments – 5 minutes
3. Review and Approval of Minutes for December 20, 2024 – 5 minutes
4. Clean Energy Jobs Report – Update – 15 minutes
5. Update on Federal Funding – DEEP, Green Bank, and EDCs – 15 minutes
6. Plan Coordination – 30 minutes
    a. Update on FY 2025 and Input to FY 2026 Connecticut Green Bank Comprehensive Plan – 10 minutes
    b. Update on 2025 in Conservation and Load Management Plan – 20 minutes
        - Update on EDC Performance Management Incentive to Coordinate with Green Bank[1]
7. Opportunities and Challenges – Healthy Housing – 15 minutes
8. Update on the 2025 Legislative Session – 10 minutes
9. Other Business – 15 minutes
    a. Brief Update: C&I - Government
    b. Brief Update: C&I – Small and Medium/Large Business

[1] Develop a plan by October 1, 2025 to offer to residential and C&I customers in Q1 2026 a coordinated initiative for solar photovoltaic, electric vehicle chargers, and battery storage in combination with the C&LM program offerings. The plan shall include details on the benefits, incentives, and financing opportunities along with how the Companies will coordinate with their respective internal teams, the Connecticut Green Bank, and other state and federal initiatives to encourage the adoption of renewables, storage, and electric vehicles along with energy efficiency upgrades.

c. Brief Update: Residential – Single Family and Multi-Family

10. Public Comments – 5 minutes

11. Adjourn

Microsoft Teams

Click here to join the meeting
Meeting ID: 282 093 826 163
Passcode: fKRJ8s
Or call in (audio only)
+1 860-924-7736,,410190117# United States, Hartford
Phone conference ID: 410 190 117#

RESOLUTIONS

Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors

Online

March 19, 2025
1:30 pm – 3:30 pm

1. Call to Order

2. Public Comments – 5 minutes

3. Review and Approval of Minutes for December 20, 2024 – 5 minutes

Resolution #1

Motion to approve the meeting minutes of the Joint Committee for December 20, 2024

4. Clean Energy Jobs Report – Update – 15 minutes

5. Update on Federal Funding – DEEP, Green Bank, and EDCs – 15 minutes

6. Plan Coordination – 30 minutes

    a. Update on FY 2025 and Input to FY 2026 Connecticut Green Bank Comprehensive Plan – 10 minutes

    b. Update on 2025 in Conservation and Load Management Plan – 20 minutes

        - Update on EDC Performance Management Incentive to Coordinate with Green Bank[1]

7. Opportunities and Challenges – Healthy Housing – 15 minutes

8. Update on the 2025 Legislative Session – 10 minutes

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9. Other Business – 15 minutes

    a. Brief Update: C&I - Government
    b. Brief Update: C&I – Small and Medium/Large Business
    c. Brief Update: Residential – Single Family and Multi-Family

10. Public Comments – 5 minutes

11. Adjourn

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ANNOUNCEMENTS

- **Mute Microphone** – in order to prevent background noise that disturbs the meeting, if you aren't talking, please mute your microphone or phone.

- **Chat Box** – if you aren't being heard, please use the chat box to raise your hand and ask a question.

- **Recording Meeting** – we continue to record and post the board meetings.

- **State Your Name** – for those talking, please state your name for the record.

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Empowering you to make smart energy choices

Joint Committee

Connecticut Energy Efficiency Board and the Connecticut Green Bank Board of Directors

Online
March 19, 2025

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Agenda Item #1

Call to Order

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Agenda Item #2

Public Comments

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Agenda Item #3

Approval of Meeting Minutes for December 20, 2024

Resolution #1

Resolution #1

Motion to approve the meeting minutes of the Joint Committee for December 20, 2024

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Agenda Item #4

Clean Energy Jobs Report

Clean Energy Jobs Reports (2020-2023)

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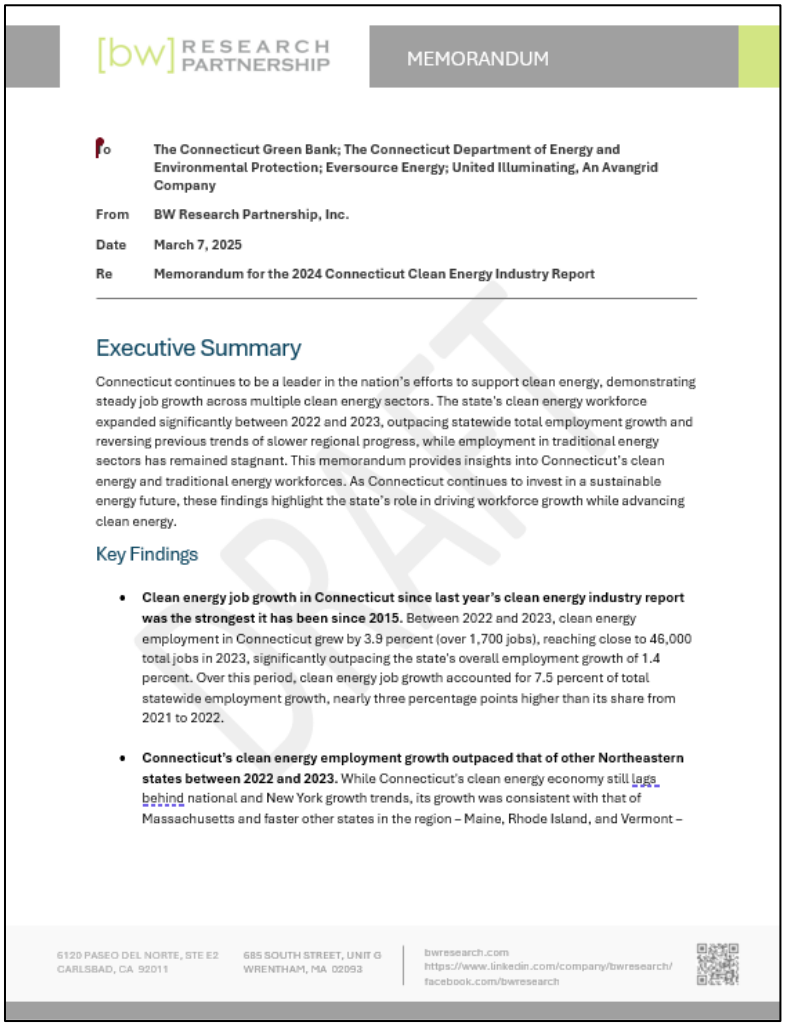
Clean Energy Jobs Report (Draft) 2024

Philip Jordan

Vice President, Principal Researcher

[bw] Research Partnership



[bw] RESEARCH PARTNERSHIP

MEMORANDUM

To The Connecticut Green Bank; The Connecticut Department of Energy and Environmental Protection; Eversource Energy; United Illuminating, An Avangrid Company

From BW Research Partnership, Inc.

Date March 7, 2025

Re Memorandum for the 2024 Connecticut Clean Energy Industry Report

Executive Summary

Connecticut continues to be a leader in the nation's efforts to support clean energy, demonstrating steady job growth across multiple clean energy sectors. The state's clean energy workforce expanded significantly between 2022 and 2023, outpacing statewide total employment growth and reversing previous trends of slower regional progress, while employment in traditional energy sectors has remained stagnant. This memorandum provides insights into Connecticut's clean energy and traditional energy workforces. As Connecticut continues to invest in a sustainable energy future, these findings highlight the state's role in driving workforce growth while advancing clean energy.

Key Findings

- **Clean energy job growth in Connecticut since last year's clean energy industry report was the strongest it has been since 2015.** Between 2022 and 2023, clean energy employment in Connecticut grew by 3.9 percent (over 1,700 jobs), reaching close to 46,000 total jobs in 2023, significantly outpacing the state's overall employment growth of 1.4 percent. Over this period, clean energy job growth accounted for 7.5 percent of total statewide employment growth, nearly three percentage points higher than its share from 2021 to 2022.

- **Connecticut's clean energy employment growth outpaced that of other Northeastern states between 2022 and 2023.** While Connecticut's clean energy economy still lags behind national and New York growth trends, its growth was consistent with that of Massachusetts and faster other states in the region – Maine, Rhode Island, and Vermont –

DRAFT

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Clean Energy Jobs Report:
Research Overview

- The 5th Annual Connecticut Clean Energy Industry Report
- Highlights trends in **clean energy and traditional energy employment** across energy technology sectors and **clean energy innovation** in Connecticut
- Data from the 2024 U.S. Energy and Employment Report *Based on a survey administered by phone and web*

593	**+/- 3.99%**
Participating Connecticut Business Establishments	Margin of Error at a 95% Confidence Interval

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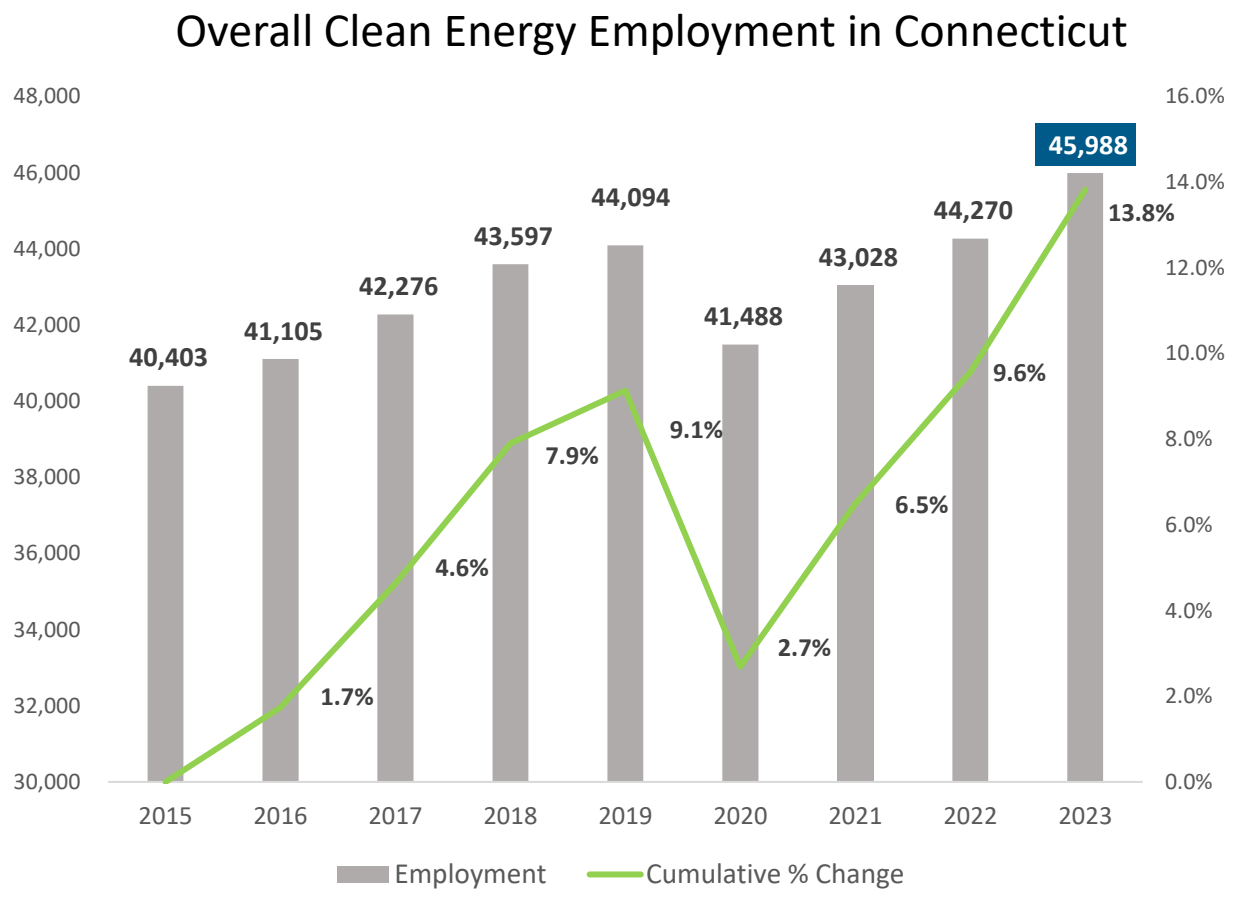
Clean Energy Jobs Report:
Overall Employment



- Nearly **46,000** clean energy jobs in Connecticut
- **3.9%** net growth 2022-2023, the strongest Y-o-Y growth since 2015
- Clean energy jobs represent **2.7%** of total jobs in the state, as of 2023

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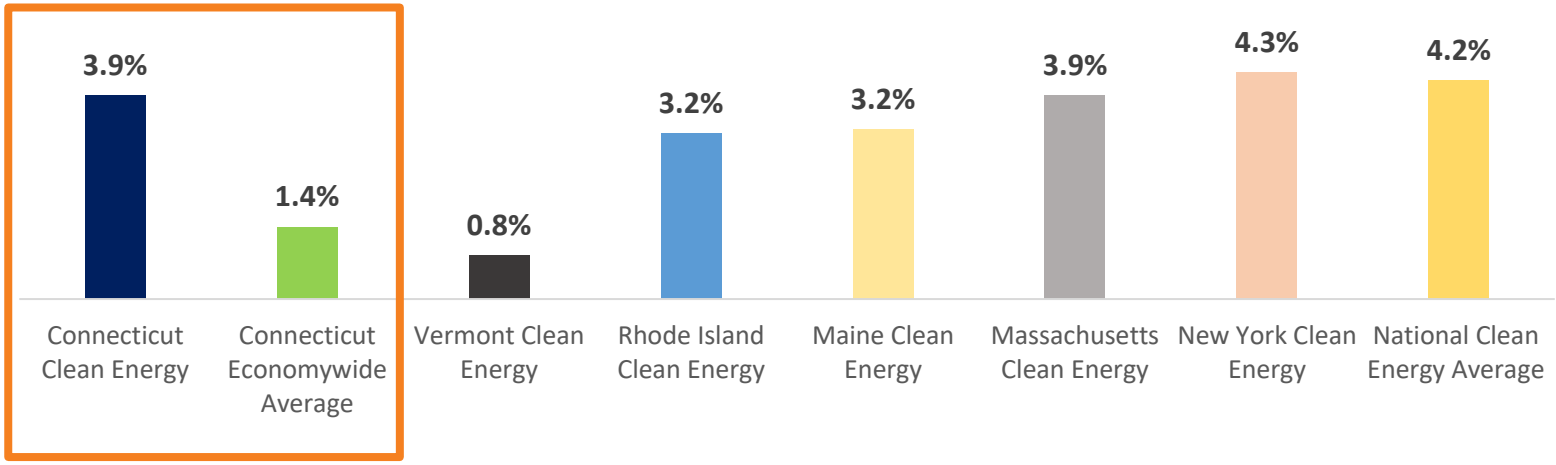
Total jobs sourced from U.S. BLS QCEW, December 2023, All industries, All employees in total covered

Clean Energy Jobs Report:
Regional Comparison

Clean Energy Employment Change by Region, 2022-2023



- The state's Y-o-Y clean energy growth outpaced its overall economy growth
- From 2022 to 2023, Connecticut's clean energy industry grew at a rate consistent with that of Massachusetts and faster than Vermont, Rhode Island, and Maine

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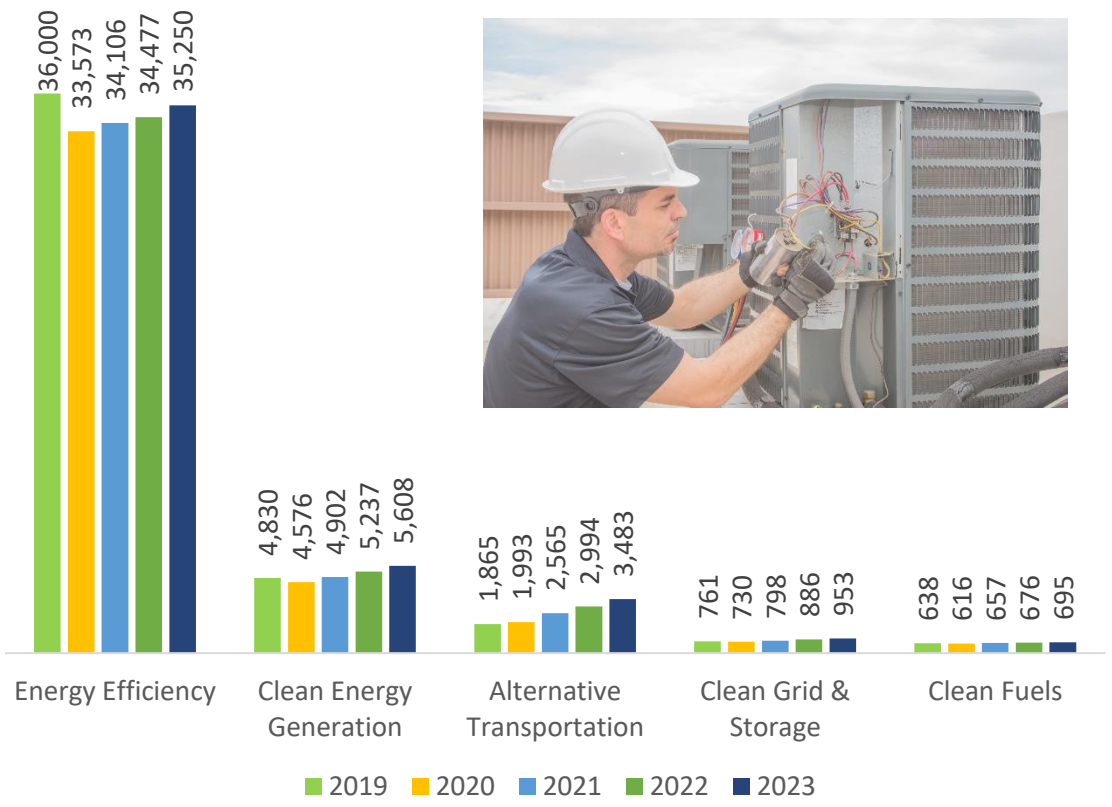
**National and state clean energy employment comparisons are all based on Connecticut's definition of clean energy.*

Clean Energy Jobs Report:
Technology Sector Employment

- All technology sectors grew from 2022 to 2023
- The three fastest-growing sectors outpaced their national growth rates:
  - **Alternative Transportation**, driven by Hybrid-Electric Vehicles
  - **Clean Grid & Storage**, driven by Energy Storage
  - **Clean Energy Generation**, driven by Solar

Clean Energy Employment by Technology



**National clean energy employment comparisons are based on Connecticut's definition of clean energy.*

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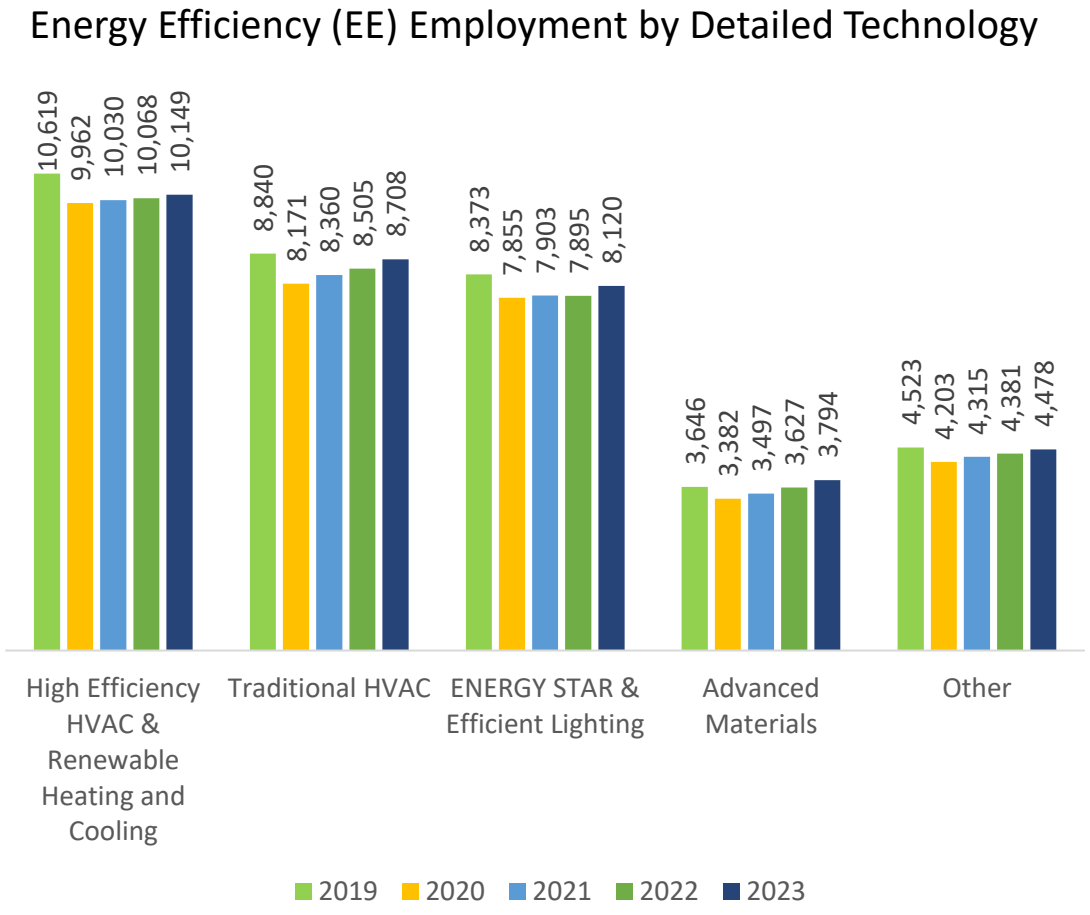
Clean Energy Jobs Report:
Energy Efficiency Sector Employment



- EE continues to be the largest technology sector, in both employment and number of establishments
- EE growth (**+770 jobs**) was the primary driver of overall clean energy growth, 2022-2023
- High-Efficiency HVAC & Renewable Heating and Cooling accounts for **29%** of EE jobs, but is still below its 2019 employment

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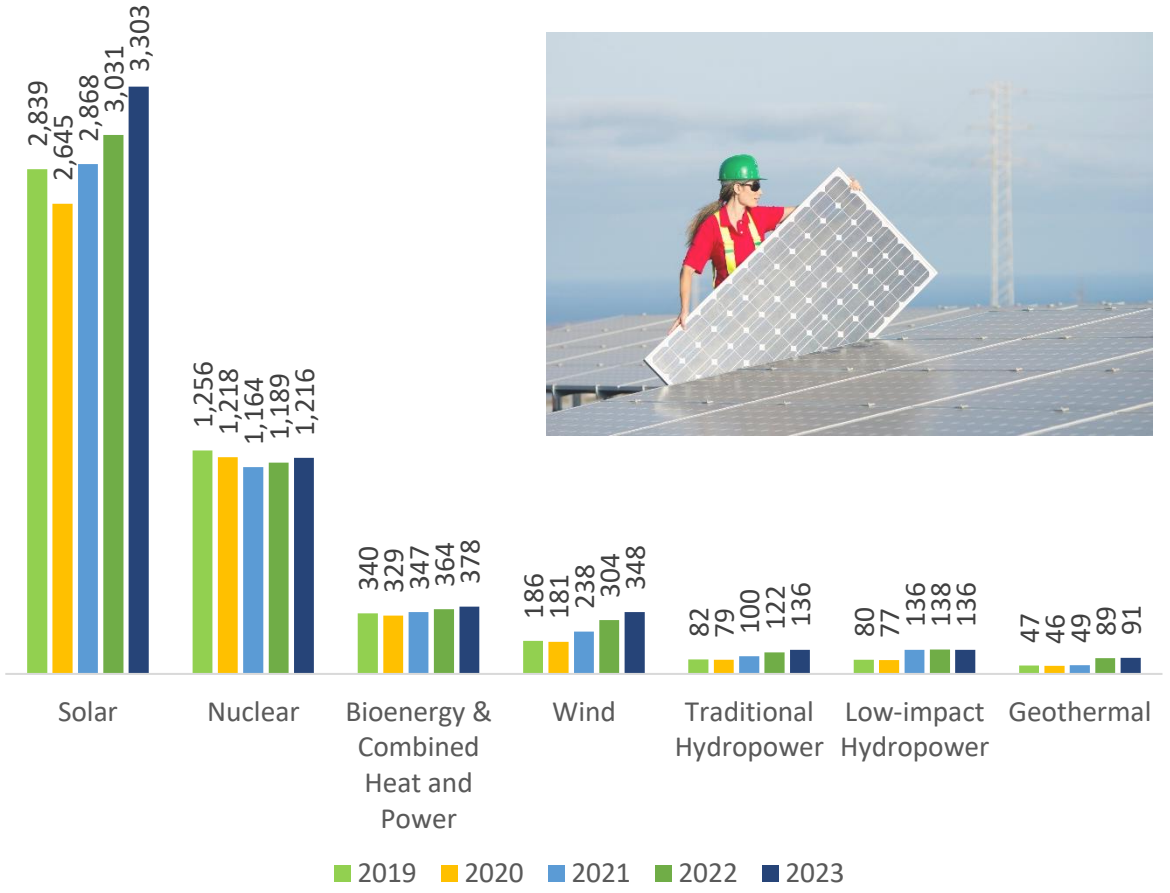
Clean Energy Jobs Report:
Clean Energy Generation Sector Employment

- Solar jobs account for **59%** of total CEG employment in 2023
- Solar gained the most jobs from 2022 to 2023 (**+270 jobs**)
- Wind and Traditional Hydropower jobs grew faster than the CEG sector overall

Clean Energy Generation (CEG) Employment by Detailed Technology



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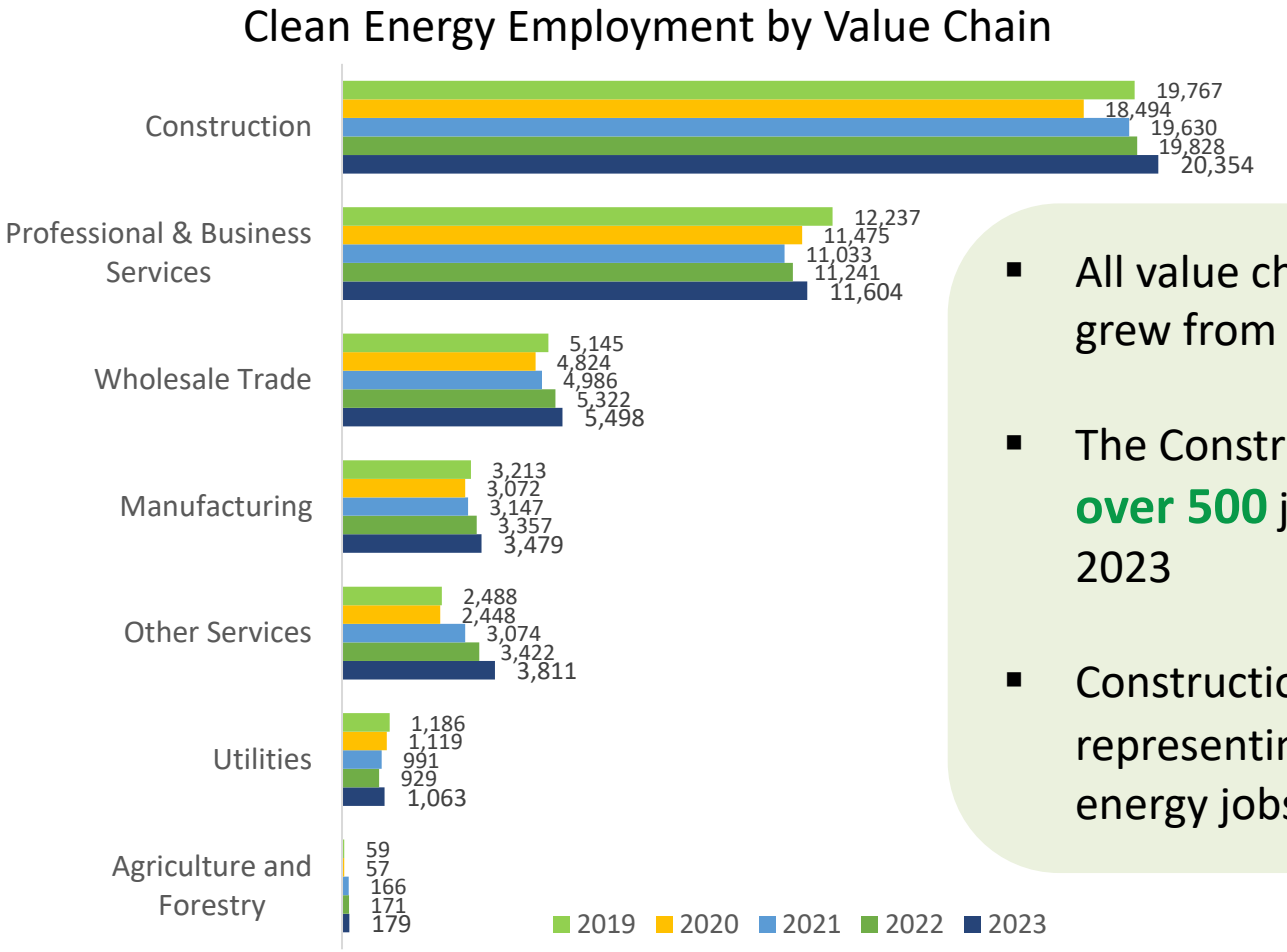
Clean Energy Jobs Report:
Value Chain Employment



- All value chain (VC) segments grew from 2022 to 2023
- The Construction VC added **over 500** jobs from 2022 to 2023
- Construction is the largest VC, representing **44%** of clean energy jobs in 2023

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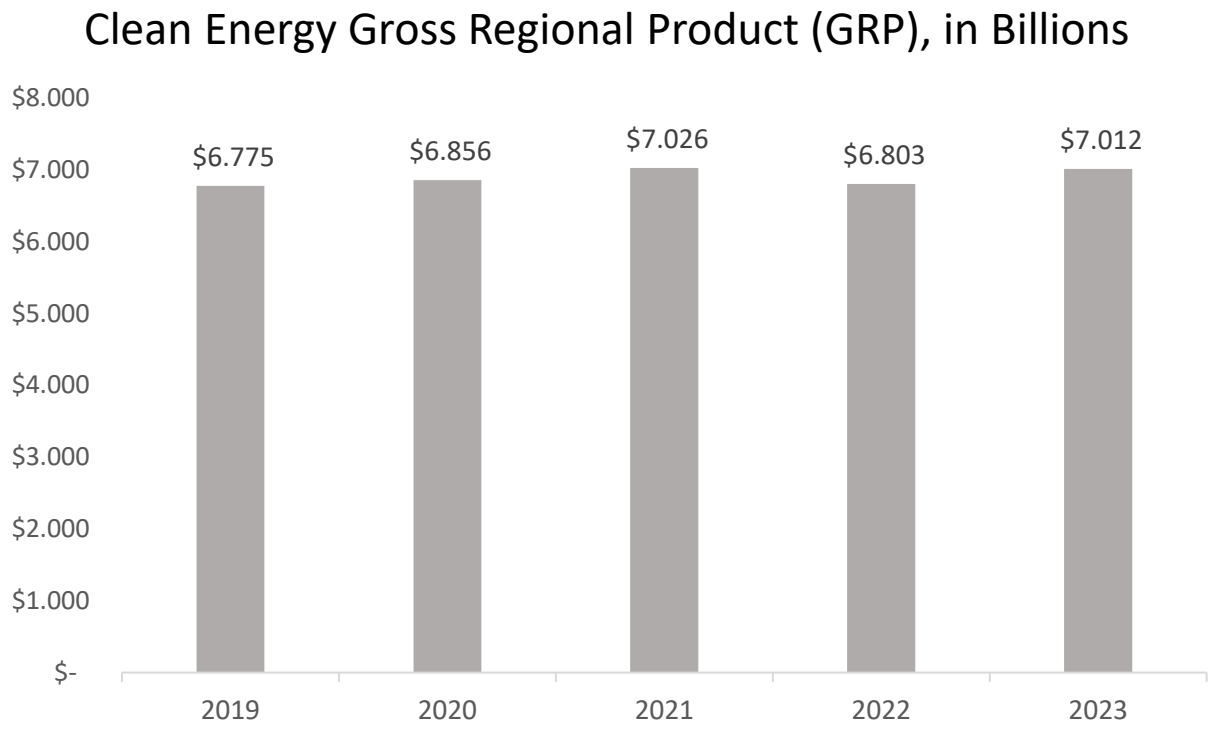
Clean Energy Jobs Report:
Gross Regional Product



- Clean Energy accounted for **2.4%** of Connecticut's total GRP in 2023
- Clean energy contributions increased by **3.1%** from 2022 to 2023

Real Gross Domestic Product (GDP) by state was revised by the Bureau of Economic Analysis (BEA) for the years 2019-2023. The 2024 CT Clean Energy Jobs Report reflects the revised values and therefore may have different values than what was reported in prior years of the report.

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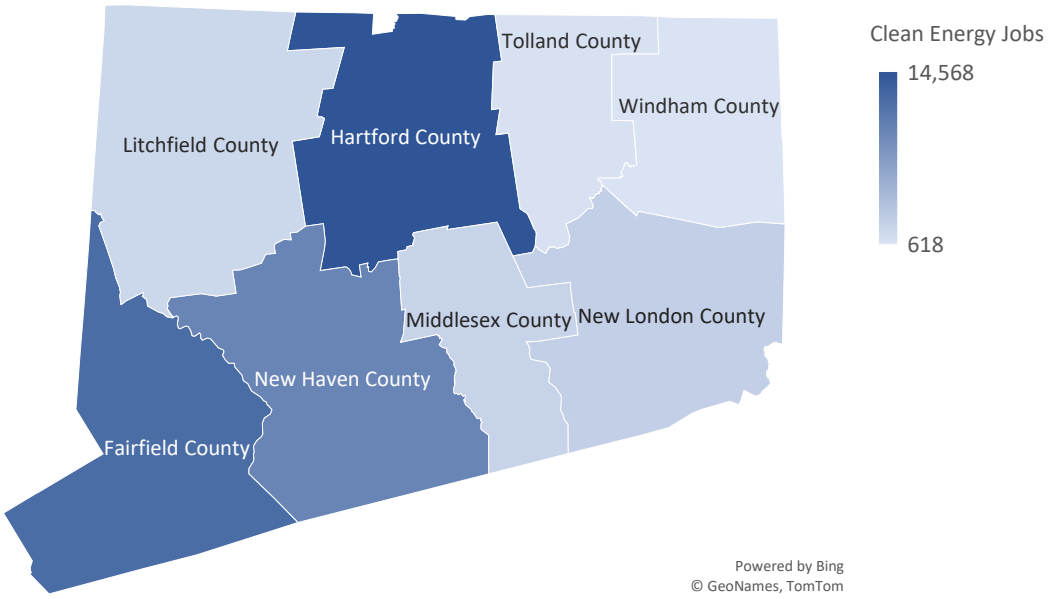
Clean Energy Jobs Report:
County Employment

Clean Energy Employment by County



- Together, Hartford, Fairfield, and New Haven Counties employed **80%** percent of Connecticut's clean energy workers in 2023
- **Almost 14,600** clean energy workers are employed in Hartford County
- Hartford County added the greatest number of clean energy jobs (**+900 jobs**) from 2022 to 2023

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Clean Energy Jobs Report:
Demographics

Clean Energy Demographics, 2023

	Connecticut Clean Energy	Connecticut Overall	U.S. Clean Energy	U.S. Overall
Women	27%	49%	28%	47%
Minorities/ Mixed-Race	21%	22%	27%	24%
Veterans	9%	3%	10%	5%
55 Years and Over	13%	28%	14%	23%

Connecticut's clean energy workforce had less gender and racial diverse than its overall workforce in 2023.

Its share of women and veterans is similar to that of the nation's clean energy workforce.

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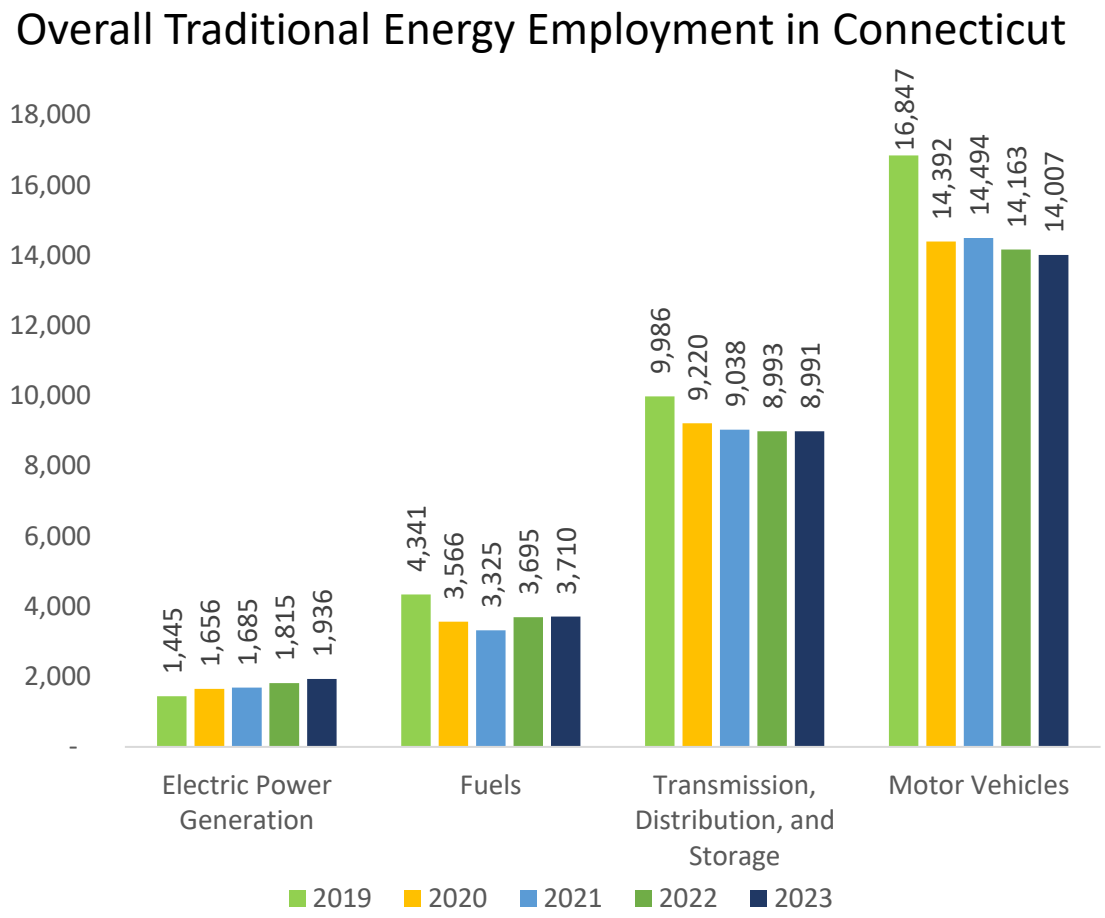
Clean Energy Jobs Report:
Traditional Energy Employment



- **Over 28,600** traditional energy workers in Connecticut in 2023
- Clean energy employment in Connecticut has grown by 8.8% since 2019 while traditional energy employment has declined by **9.1%**
- Motor Vehicles is the largest traditional energy sector, and the primary driver behind the overall job losses

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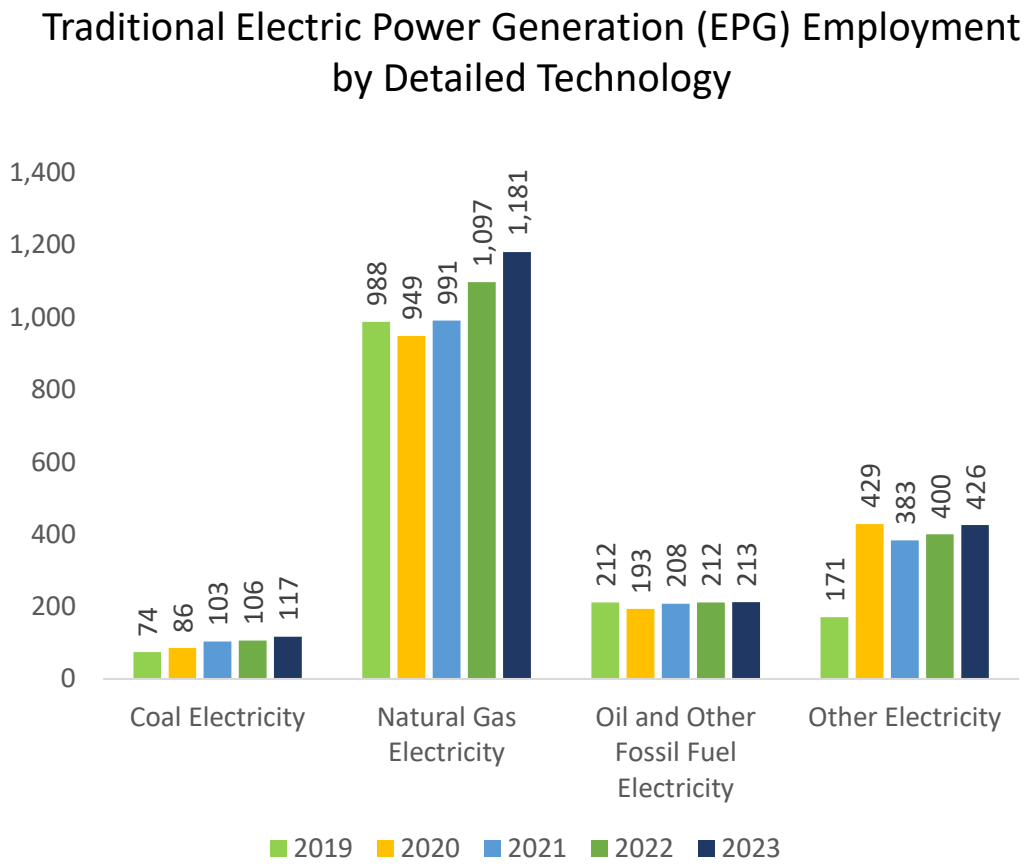
Clean Energy Jobs Report:
Traditional Electric Power Generation Employment



- Traditional EPG was the only traditional energy sector to grow from 2019 to 2023
- Traditional EPG grew by **34%** over the five years
- **61%** of employment in traditional EPG is within Natural Gas Electricity, which drives the job growth in this sector

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Clean Energy Jobs Report:
BW Research Team

Project Leadership Team

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& Principal Researcher
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[bw] RESEARCH PARTNERSHIP

Clean Energy Jobs Report

APPENDIX

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Clean Energy Jobs Report:
Gross Regional Product

Clean Energy GRP by Value Chain

	2022 Clean Energy GRP	2023 Clean Energy GRP	% Change	Proportion
Professional and Business Services	$2.775	$2.818	1.5%	40.2%
Manufacturing	$1.655	$1.801	8.8%	25.7%
Utilities	$1.312	$1.340	2.2%	19.1%
Construction	$0.484	$0.473	-2.3%	6.7%
Wholesale Trade	$0.542	$0.547	1.0%	7.8%
Other Services	$0.033	$0.031	-5.8%	0.4%
Agriculture and Forestry	$0.003	$0.003	3.2%	0.0%
TOTAL	$6.803	$7.012	3.1%	

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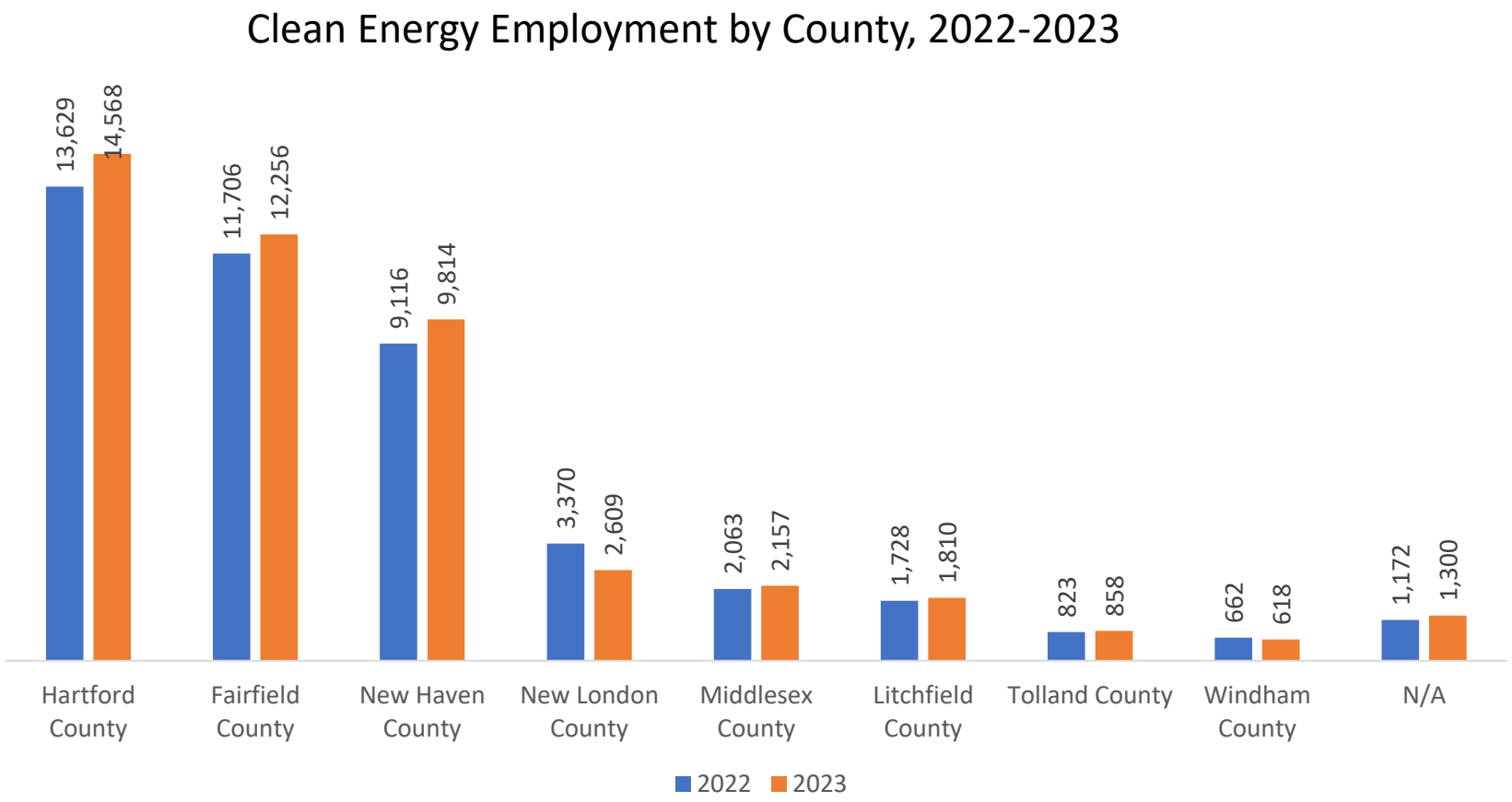
Clean Energy Jobs Report:
County Employment



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Empowering you to make smart energy choices

Agenda Item #5

Update on Federal Funding

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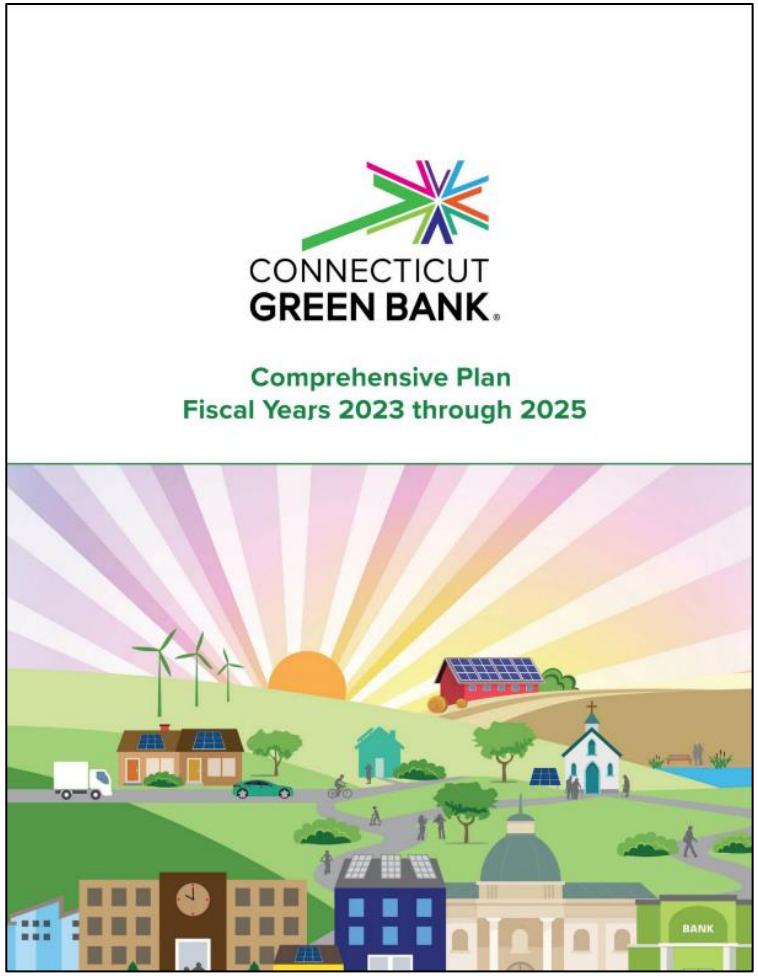
Empowering you to make smart energy choices

Agenda Item #6a

Connecticut Green Bank
Update on FY25 and Input on FY26 Comprehensive Plan

Connecticut Green Bank
Comprehensive Plan FY25 – Update

- **Program Implementation**
  - **Incentive Programs** – support 1000 MW by 2030 target (CGS 16-243ee) through ESS in collaboration with EDCs
    - 505 project target for over 14 MW of installed capacity
    - **Challenges** – customer acquisition (residential), passive and active dispatch, DERMS data, interconnection (non-residential)
  - **Financing Programs** – support suite of financing products, including C-PACE (CGS 16a-40g), Solar MAP (CGS 16-244z), SBEA (CGS 16-245m), and Smart-E Loan to support nearly 1,900 projects and 10 MW
  - **Environmental Infrastructure** – recently release "Waste and Recycling Primer"



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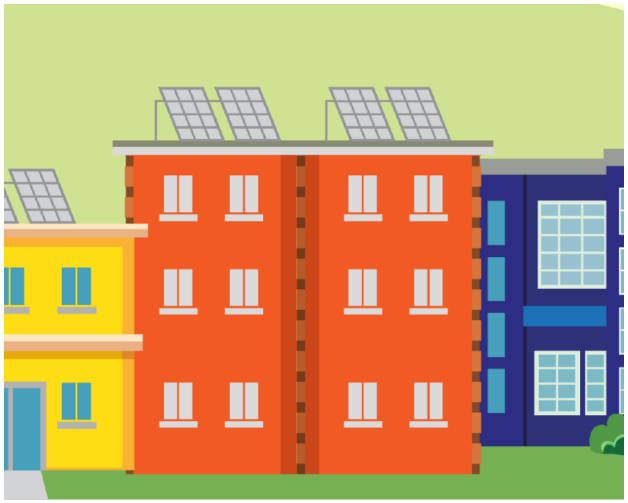
REFERENCES

https://www.ctgreenbank.com/wp-content/uploads/2024/07/Comprehensive-Plan_FY-2025_071924.pdf

Connecticut Green Bank
Comprehensive Plan FY26 – Input

Invest in Resilience
(Support SB-9)
(C-PACE and Smart-E)



Invest in Affordable Housing
(Implement PA 21-48)

Invest in Electric School Buses
(Implement PA 22-25)

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Empowering you to make smart energy choices

Agenda Item #6B

Update on 2025 C&LM Plan

EDC Performance Management Incentive to Coordinate with Green Bank

2025 Statewide Plan Update Savings and Benefits

Every $1 invested in EE results in $3.90 in lifetime benefits

Year	Budgets ($000)			Annual Savings							Lifetime Savings		
	Electric	Natural Gas	Total	Electric (GWh)*	Peak (MW) **	Natural Gas (MMcf)	Oil (gallons)	Propane (gallons)	Annual Savings (MMBtus) ***	CO_2 Emissions (tons)	Lifetime Benefit ($000)	Lifetime Savings (MMBtus) ***	Lifetime CO2e Metric Tons
2025	$193,990	$54,577	$248,567	89	124	475	1,796,607	631,149	1.1	81,376	$941,827	15.1	1,038,173
2026	$181,670	$53,176	$234,845	72	95	478	1,847,235	635,375	1.1	75,816	$938,717	14.7	984,226
2027	$183,824	$53,416	$237,240	69	103	479	1,884,734	646,044	1.1	76,280	$914,767	14.7	982,838
Total	**$559,484**	**$161,169**	**$720,653**	**230**	**322**	**1,432**	**5,528,576**	**1,912,568**	**3.2**	**233,472**	**$2,795,312**	**44.5**	**3,005,237**

*Abbreviation for Gigawatt hours includes increase in electric usage due to electrification measures.
**Savings include demand response programs.
***Natural Gas MMcf includes gas savings from electrification.
****In millions of MMBtu. Figures listed are site MMBtus and address only the energy saved at the meter level.

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Plan text changes since 11/01/2024 filing

Residential Portfolio

- Removed soundbars from measured incentive lists
- Will offer air-to-water and small ducted high velocity heat pump incentives
- Removed Online Marketplace for heat pump water heaters (added only if budgets become available)

C&I Portfolio

- Clarified responses to align with DEEP data
  - Updated tailored market solutions section (controlled environment agriculture, nonprofits (Q-42)
  - Updated “Phase Out of Non-Controlled Lighting” (Q-43)
  - Clarified study costs for Energy Utilization Assessments (Q-44)

Plan text changes since 11/01/2024 filing

Education & Community Outreach Portfolio

- Updated Education section to reflect EEB's approval of two **Energize CT in Action** exhibits
- Added K-12 student contest goals

Other

- Updated performance management incentive (PMI) text / metrics
- Budget and savings changes
- Updated compliance filings
- Updated Evaluation section w/ new studies (Heat Pump / Electrification market study and Single-Family Weatherization market assessment)
- Edits to clarify budgets, savings, and revenues

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New PMI for Electric Companies to Coordinate with Green Bank

Weight	Program	Metric Objective	Description
1.0%	Residential and C&I Portfolios	Coordination with the Connecticut Green Bank	Develop a plan by October 1, 2025, to offer to residential and C&I customers in Q1 2026 a coordinated initiative for solar photovoltaic, electric vehicle chargers, and battery storage in combination with the C&LM program offerings. The plan shall include details on the benefits, incentives, and financing opportunities along with how the Companies will coordinate with their respective internal teams, the Connecticut Green Bank, and other state and federal initiatives to encourage the adoption of renewables, storage, and electric vehicles along with energy efficiency upgrades.

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Agenda Item #7

Opportunities and Challenges

Healthy Housing

CGB Solar MAP for Affordable Housing
Solar + EE in Master Metered Properties

Site	Congregate	Juniper Hill Village	The Monarch	Federation Square
Owner	Hamden Housing Authority	Eldery Housing Management	Vesta	Simon Konover
City	Hamden	Mansfield	New Haven	West Hartford
Solar PV Size	182	401	118	310
Improvement Funding	$ 241,635	$ 461,861	$ 146,125	$ 374,129
Improvement	TBD	TBD	Potentially Security Enhancements	Window Upgrades

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Agenda Item #8

Update on the 2025 Legislative Session

2025 Legislative Session Update

Convened on January 8th and Adjourns on June 4th "Sine Die"

CONNECTICUT GREEN BANK

What's driving the discussion in 2025 in terms of Energy and the Environment:

- ***High Electric Rates*** – Politics with SB 647 - over – Policy with SB 4 "Public Benefits Charge"
- ***PA 24-31*** - PURA to study renewable energy tariffs and potential successor programs by January 15, 2026

Legislative Session – Currently nearing Phase 3:

Phase 1: Bill Introduction/Bill Screening – 2,000 proposed pieces of legislation this session
Phase 2: Public Hearing & Committee Process ongoing but nearing conclusion
Phase 3: E&T JF Deadline *3/20* - Met for final meeting on 3/18
File Copies Released - Negotiation Phase

SB 647: AN ACT CONCERNING PROTECTIONS FOR CONSUMER ACCESS TO AFFORDABLE ELECTRICITY

Republican Caucus Bill with stated purpose: To reduce energy costs and increase energy supply

- *Sections 1-3 move programs funded by the "Public Benefits Charge" from Electric Bills to the State Budget. C&LM, ESS, EV.....Subjects programs to budget sweeps and line-item veto's.*
- *Section 4 eliminates the Clean Energy Fund after July 1, 2025. Green Bank Funding Elimination*
  - *Would cripple the green economy in terms of eliminating long term financial stability, jobs and taxes*
  - *Would devastate deployment into EJ communities negating health and economic development.*

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Agenda Item #9a

Other Business

Brief Update: C&I – Government

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Agenda Item #9b

Other Business

Brief Update: C&I – Small and Medium/Large Business

Brief Update
C&I – Small and Medium/Large Business

Purchasing & Servicing Agreement between Amalgamated Bank, Green Bank, and Eversource

Small Business Energy Advantage Loans

Business Energy Advantage Loans

Municipal Loans

In March 2025, parties targeting to enter into Fourth Amended Agreement for 2025-2027 term

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Agenda Item #9c

Other Business

Brief Update: Residential – Single and Multifamily

Brief Update
Single Family and Multifamily

Single Family

- Smart-E Loan continues to provide easy and affordable access to private capital through network of local community banks and credit unions
- PosiGen – combines solar + storage financing, including energy efficiency

Multifamily

- CGB seeking board approval to extend LIME partnership with C4C

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Agenda Item #10

Public Comments

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Agenda Item #11

Adjourn

Draft MINUTES

Joint Committee of the CT Energy Efficiency Board and the Connecticut Green Bank Board of Directors

Friday, December 20, 2024
9:00 am – 10:30 am

In Attendance

Voting Members: Joseph DeNicola, John Harrity, Melissa Kops

Non-Voting Members: Stephen Bruno, Brian Farnen, Bryan Garcia, Bert Hunter, Jillian Winterkorn

Members Absent: John Viglione, Brenda Watson

Others: Gentiana Darragjati, Diane Del Rosso, James Desantos, Richard Del Soldato, Dykes, Richard Faesy, Kathy Fay, Anthony Kosior, George Lawrence, Cheryl Lumpkin, Amy Mclean Salls, Ralph Mesite, Bernard Pelletier, Daniel Rabin, Ghani Ramdani, Ariel Schneider, Stacy Sherwood, Becca Trietch, James Williamson, Jillian Winterkorn

Unnamed Callers:

1. Call to Order

   - Melissa Kops called the meeting to order at 9:02 am.

2. Public Comments

   - Richard Faesy asked if the Public knows the meetings exist, whether they are publicized, and how to increase public awareness. Jim Williamson responded there is a similar process for public notice to the EEB meetings, in that they are included in the subscription mailing list and it is on the Energize CT calendar. Bryan Garcia added it is on the CGB website in the calendar of events and with the Secretary of State. However, the group agreed that general public awareness and engagement could be improved.

3. Review and approval of Meeting Minutes from the September 25, 2024 meeting.

Resolution #1

Motion to approve the meeting minutes of the Joint Committee for September 25, 2024.

Upon a motion made by John Harrity and seconded by Joe DeNicola, the Joint Committee voted to approve Resolution 1. None opposed or abstained. Motion approved unanimously.

4. Joint Committee – Regular Meeting Schedule for 2025

- Bryan Garcia reviewed the schedule for 2025 and why the dates were selected. Becca Trietch added that there was a lot of coordination between the various departments and public meetings in order to make it work as best as possible.

Resolution #2

Motion to approve the regular meeting schedule of the Joint Committee for 2025, including:

- March 19, 2025
- June 18, 2025
- September 24, 2025
- December 17, 2025

Meetings will take place online from 1:30 – 3:30 pm.

Upon a motion made by John Harrity and seconded by Joe DeNicola, the Joint Committee voted to approve Resolution 2. None opposed or abstained. Motion approved unanimously.

5. Plan Coordination
    a. Input to FY 2025 Connecticut Green Bank Comprehensive Plan (Revisions)

- Bryan Garcia summarized the history and process of the development of the Comprehensive Plan. He stated the Green Bank is focused on implementing various programs including incentive programs and continuing to build the energy storage market. He summarized the progress and goals for the Financing Programs including Smart-E, the Commercial Property Assessed Clean Energy programs, and SBEA programs, and the progress and goals of the Environmental Infrastructure programs. He summarized the plan to implement the Inflation Reduction Act programs and funds.
    - John Harrity commented that the process is never ending and exhausting but the Green Bank team has been determined, persistent, and praised them for their efforts.
    - Melissa Kops asked if there has been any Public Comment on the Comprehensive Plan and Bryan Garcia responded that the process is different from the C&LM plan, it is more programmatic. For example, the Green Bank invites stakeholders to participate in facilitated discussions on various topics (e.g., electric school buses, environmental infrastructure, green schools and municipalities), which feed into program goals and design.

    b. 2025-2027 Conservation and Load Management Plan

- Jillian Winterkorn summarized the plan development since March 2023 and noted that implementation is coming soon. She reviewed the plan budget, savings, and benefits which is approximately $700million for the 3 years. She summarized the Plan priorities of decarbonization, equitable access, and energy affordability.
- Stephen Bruno summarized the core Residential products which includes HVAC and Water Heating equipment, Residential New Construction, Home Energy Solutions, and more. For Financing programs, he reviewed some of the options available including the Energy

Conservation Loan, Smart-E Loan, Landlord Loan, Navigator Pre-Development Energy Loan, and more. He noted that Energize CT Heat Loan sunsets on December 31, 2024.

- John Harrity asked in relation to heat pumps, if he means a general category or geothermal. Stephen Bruno responded it is the general category.
- John Harrity asked if they see a lot of geothermal heat pumps installed and Jillian Winterkorn and Diane Del Rosso responded that there is a significant update of air source heat pumps over geothermal and ground source heat pumps. The group discussed some new financing options for heat pumps that have been in development.
- Melissa Kops asked about the status of the Revolving Loan Fund that is being established and Becca Trietch responded that there has been a lot of progress to get it set up and explained those efforts.
- John Harrity asked how Connecticut compares to other states in relation to mandates for new construction in terms of energy savings. Becca Trietch responded that the state is strongly committed to staying up to date with the latest base codes and standards. Melissa Kops added that Connecticut is pretty far ahead of much of the country in terms of putting efficiency into their base codes but is not necessarily at the very top.
- Bernard Pelletier asked where the public finds information about all the various residential financing options, as he does not see some on the Energize CT website. Stephen Bruno responded that he will double check the Energize CT website to ensure they are listed, but some of the programs are offered through Capital for Change or the Green Bank as well. The group discussed their visibility more and confirmed they are on the Energize CT website but would discuss changes with the Marketing team to ensure better visibility.

- Stephen Bruno praised the Green Bank for their negotiations for the Smart-E Loan rate to ensure customers have access to an affordable financing option. He compared to Massachusetts where interest rates are bought down, and are expensive in a high interest rate environment.
- Stephen Bruno reviewed the C&I Financing program options such as the Small Business Loan, Municipal Loan, and more.
- Richard Faesy summarized the progress and coordination between the C&LM Plan and Green Bank, highlighting some of the mission variances between the two organizations in order to develop a plan to increase the coordination across all involved. The group discussed various efforts and opportunities to better work together while remaining strategic.

6. Healthy Housing

- Mackey Dykes summarized the history and progress to combine solar and efficiency for affordable multifamily housing through the Solar Map program. He identified several ongoing projects, and the improvements planned for them.
- John Harrity asked if there is an agreement with landlords not to raise the rent and Mackey Dykes responded yes there is an explicit measure to ensure that would not happen and to protect tenants.
- Bernard Pelletier commented that it is such an amazing program and urged everyone to make it more well known.
- Melissa Kops asked if the energy efficiency improvements are intended to leverage the C&LM programs. Mackey Dykes responded yes and that the measures have to meet the technical requirements of the C&LM program, specifically multifamily initiatives, and that they have to contact the utility company as part of the program.

7. Plans for the 2025 Legislative Session

- Bryan Garcia summarized the general progress that the Green Bank is going through for the upcoming legislative session and goals for it, which includes a focus on resiliency measures and support for SB-11.
- Bernard Pelletier expressed concerns that the upcoming session will require defending what the organizations have now, compared to in the past which is usually focused on asking for the means to do more. Melissa Kops agreed. The group discussed possibilities and concerns for the upcoming legislative session.

8. Other Business
    a. Brief Update: C&I – Government
    b. Brief Update: C&I – Small and Medium/Large Business

- Gentiana Darragjati summarized the progress of the SBEA & MUNI financing programs, which includes finalizing 3 loan tranches with a fourth planned for sale on December 31, 2024. The total funded is anticipated to be about $15million with the next tranche and this includes about 500 loans in total.
    - George Lawrence asked if the very low default rate is still true of the Small Business loans. Gentiana Darragjati responded it has increased but it is based on the loan origination, so there were many during the COVID years of 2021 – 2023, but it is better maintained now.

    c. Brief Update: Residential – Single Family and Multi-Family

- Bryan Garcia commented that much of the update had been hit in earlier discussions.

    d. Other Business

- Bryan Garcia commented that Raise Green, which supports the Green Liberty Notes program, has been acquired by Honeycomb but the transition should be good overall as they have done more in the crowdfunding market.
- John Harrity commented that although these meetings may seem routine, he knows how importance to reduce carbon and battle climate change is, and appreciates everyone's efforts to do so and continue this line of work.

9. Public Comments

- None

10. Adjourn

Upon a motion made by John Harrity and seconded by Joe DeNicola, the Joint Committee adjourned at 10:22 am.

Respectfully submitted,

_____

Melissa Kops, Chairperson

[bw] RESEARCH PARTNERSHIP

MEMORANDUM

To	**The Connecticut Green Bank; The Connecticut Department of Energy and Environmental Protection; Eversource Energy; United Illuminating, An Avangrid Company**
From	**BW Research Partnership, Inc.**
Date	**March 7, 2025**
Re	**Memorandum for the 2024 Connecticut Clean Energy Industry Report**

Executive Summary

Connecticut continues to be a leader in the nation's efforts to support clean energy, demonstrating steady job growth across multiple clean energy sectors. The state's clean energy workforce expanded significantly between 2022 and 2023, outpacing statewide total employment growth and reversing previous trends of slower regional progress, while employment in traditional energy sectors has remained stagnant. This memorandum provides insights into Connecticut's clean energy and traditional energy workforces. As Connecticut continues to invest in a sustainable energy future, these findings highlight the state's role in driving workforce growth while advancing clean energy.

Key Findings

- **Clean energy job growth in Connecticut since last year's clean energy industry report was the strongest it has been since 2015.** Between 2022 and 2023, clean energy employment in Connecticut grew by 3.9 percent (over 1,700 jobs), reaching close to 46,000 total jobs in 2023, significantly outpacing the state's overall employment growth of 1.4 percent. Over this period, clean energy job growth accounted for 7.5 percent of total statewide employment growth, nearly three percentage points higher than its share from 2021 to 2022.

- **Connecticut's clean energy employment growth outpaced that of other Northeastern states between 2022 and 2023.** While Connecticut's clean energy economy still lags behind national and New York growth trends, its growth was consistent with that of Massachusetts and faster other states in the region – Maine, Rhode Island, and Vermont –

over the last year, after progressing slower than Massachusetts and Maine from 2021 to 2022.[1]

- **Connecticut's clean energy industry expanded across all technology sectors from 2022 to 2023 and the fastest-growing sectors- Alternative Transportation (16.3 percent), Clean Grid and Storage (7.6 percent), and Clean Energy Generation (7.1 percent)- outpaced national growth rates.** Key sub-technologies driving this growth included Hybrid-Electric Vehicles (+263 jobs) within Alternative Transportation, Energy Storage (+37 jobs) within Clean Grid and Storage, and Solar (+272 jobs) within Clean Energy Generation.

- **Energy efficiency (EE) continues to be the largest technology sector within Connecticut's clean energy industry as most clean energy jobs and business establishments in Connecticut are part of the EE sector.** This sector added around 770 jobs and almost 80 establishments from 2022 to 2023, making EE the primary driver of overall job growth in the state's clean energy industry. However, despite this year-over-year growth, EE remains 2.1 percent below its 2019 pre-pandemic level.

  Within EE, High-Efficiency HVAC & Renewable Heating and Cooling remained the largest sub-technology, accounting for 28.8 percent of EE jobs. While it has been growing over the last few years, employment in this sub-technology is still 4.4 percent below what it was in 2019 and why the EE sector overall has yet to fully recover from pandemic-induced job losses.

- **Between 2022 and 2023, clean energy employment grew across all value chain segments in Connecticut, with the largest job gains in Construction, Other Services, and Professional and Business Services.** The Construction value chain, which accounts for the largest share (44.3 percent) of all clean energy jobs, continues to be heavily concentrated in the Energy Efficiency sector and represents over half (52.2 percent) of total EE sector employment. While Constructions added the great number of jobs (over 500) from 2022 to 2023, Connecticut's clean energy Utilities sector grew the fastest (14.5 percent).

- **Together, Hartford, Fairfield, and New Haven Counties employed four-in-five (79.7 percent) clean energy workers in Connecticut in 2023, with Hartford employing the**

[1] National and state clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

largest share and adding over 900 jobs from 2022 to 2023. In contrast, New London County saw the steepest decline of 22.6 percent, losing over 750 clean energy jobs.

- **While clean energy employment in Connecticut has grown over the last five years, traditional energy jobs have declined.** Since 2019, employment in the clean energy industry has increased by 8.8 percent. At the same time, traditional energy employment has declined by 9.1 percent, largely driven by the Motor Vehicle technology sector. Yet, over the past year, from 2022 to 2023, traditional energy employment remained relatively stable, with a loss of only 24 jobs, representing a decline of less than a one percent**.**

- **The Electric Power Generation technology sector is the smallest within Connecticut's traditional energy industry and the only sector that has grown since 2019.** The state's traditional energy industry has four major technology sectors – Electric Power Generation; Fuels; Transmission, Distribution, and Storage; and Motor Vehicles – and from 2019 to 2023, employment in all sectors except Electric Power Generation has declined. Traditional Electric Power Generation has grown by 34.0 percent over this time and within this sector, Natural Gas Electricity employs the largest share (61.0 percent) of workers and added almost 200 workers between 2019 and 2023.

Introduction

This memorandum provides a summary of the initial findings for the 2024 Connecticut Clean Energy Industry Report (CTCEIR), covering clean energy and traditional energy employment trends. The subsequent and finalized report and analysis, will be the fifth annual report tracking clean energy employment in Connecticut, highlighting the initial impacts from the wave of significant federal funding put forward in the 2021 Infrastructure Investment and Jobs Act and the 2022 Inflation Reduction Act. The Joint Committee commissioned BW Research Partnership to produce the 2024 report, with financial support from the Connecticut Green Bank, Eversource, and United Illuminating.

The 2024 CTCEIR analyzes historical clean energy employment trends from 2017 to 2023, using Connecticut's unique clean energy definition.[2] It provides a breakdown of clean energy employment by technology sector, sub-technology, and industry value chain segment. This year's report also updates county-level employment figures, clean energy firms' contributions to Gross Regional Product (GRP) in Connecticut, workforce demographics, and notable clean energy policies introduced in 2024. In addition to this standard clean energy employment analysis found in previous years' CTCEIRs, an analysis of the state's traditional energy employment and clean energy innovation metrics will be included in this 2024 CTCEIR.

All employment data in this report is sourced from the 2024 U.S. Energy and Employment Report (USEER).[3]

[2] For further detail on Connecticut's clean energy industry definition and what constitutes a clean energy job, please refer to Appendix B: Clean Energy Technology List and Definitions.
[3] https://www.energy.gov/policy/us-energy-employment-jobs-report-useer.

Connecticut Clean Energy Industry Overview

2024 New and Notable Clean Energy Policies

Connecticut remained committed to its clean energy agenda throughout 2024 with the continuation and introduction of numerous policies and initiatives. Compared to previous years, these efforts reflect a more integrated approach, prioritizing energy storage, home and commercial efficiency, solar and hydropower expansion, and grid reliability.

In 2024, Connecticut broadened its energy procurement strategies to include a more diverse array of renewable and zero-emission resources. Notably, the Department of Energy and Environmental Protection (DEEP) is now authorized to solicit proposals from various energy providers, including hydropower sources, and to coordinate zero-carbon procurements for nuclear facilities in collaboration with other states.[4] By the end of the year, the DEEP selected new clean energy projects totaling 518 megawatts (MW) of solar generation and 200 MW of energy storage to be developed in Connecticut. These initiatives are expected to enhance grid reliability and save ratepayers approximately $424 million in energy supply costs over their first twenty years of operation.[5]

To further expand solar energy deployment, the state increased capacity for the Nonresidential Energy Solutions and Shared Clean Energy Facility programs, which support the adoption of solar and other clean energy projects for residential and nonresidential customers. Lawmakers also modified eligibility criteria for the Green Bank's Commercial Property Assessed Clean Energy (C-PACE), making solar and other clean energy investments more accessible to commercial property owners.[6]

The state enhanced the Connecticut Hydrogen and Electric Automobile Purchase Rebate (CHEAPR) program in 2024 as well. With this enhancement, the value of rebates and vouchers for residents of environmental justice (EJ) communities was increased to more than double the standard amount offered to non-EJ community residents.[7] This expansion promotes equitable access to clean transportation options and showcases the state's commitment to a comprehensive clean energy strategy that involves those in every part of the economy and state. These policies, along with ones passed in 2023, have led to a 74.5 percent increase in electric vehicle registrations in the state since the beginning of 2023.

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[4] Connecticut General Assembly, S.B. No. 385, https://cga.ct.gov/asp/cgabillstatus/cgabillstatus.asp?selBillType=Public+Act&which_year=2024&bill_num=38

[5] Department of Energy and environmental Protection, *Connecticut Announces Clean Energy Selections,* December 2024, https://portal.ct.gov/deep/news-releases/news-releases---2024/connecticut-announces-clean-energy-selections.

[6] Connecticut General Assembly, H.B. No 5232, https://cga.ct.gov/asp/cgabillstatus/cgabillstatus.asp?selBillType=Bill&which_year=2024&bill_num=5232.

[7] Connecticut General Assembly, H.B. No. 5523, https://www.cga.ct.gov/2024/act/pa/pdf/2024PA-00081-R00HB-05523-PA.pdf

In addition to new state level policies in 2024, Connecticut also received support from neighboring states and the federal government through Inflation Reduction Act (IRA), Bipartisan Infrastructure Law (BIL), and New England Heat Pump Accelerator Grant funding. Two programs, the Home Electrification and Appliance program (HEAR) and Solar for All program, received funding from the IRA in 2024 totaling roughly $64.9 million.[8] To support heat pump expansion and energy efficiency in the state, Connecticut received funding through the state-led New England Heat Pump Accelerator Grant initiative.

While some impact from the current uncertainties of federal government funding may be observed in the coming year, Connecticut's commitment to clean energy and a renewable future is clear and will be important for driving the strong, growing workforce within the state.

Overall Clean Energy Jobs

Jobs in Connecticut's clean energy industry include roles directly involved in the research, development, production, manufacturing, distribution, sales, implementation, installation, or repair of components, goods, or services related to Energy Efficiency, Clean Energy Generation, Alternative Transportation, Clean Grid and Storage, and Clean Fuels. Professional or business services jobs in supporting services such as consulting, finance, tax, and legal services related to energy are also included. Workers who spend part or all of their time engaged with specific clean energy technologies are classified as clean energy workers.

In 2023, the number of clean energy jobs in Connecticut reached nearly 46,000. Between 2022 and 2023, the state's clean energy employment grew by 3.9 percent, or more than 1,700 jobs. In fact, this year-over-year increase is the largest Connecticut's clean energy industry has experienced since 2015 (Figure 1). This growth also outpaced, by more than double, the statewide total employment growth of 1.4 percent. Overall, the 1,700 jobs added to the clean energy industry accounted for 7.5 percent of total statewide employment growth.[9]

In comparison, clean energy employment in Connecticut from 2022 to 2023 grew at the same rate as Massachusetts (3.9 percent), but more than four times faster than Vermont (0.8 percent). The growth was slightly faster than in Rhode Island (3.2 percent) and Maine (3.2 percent). Yet, Connecticut's clean energy industry experienced slower growth than both New York's (4.3 percent) and the national (4.2 percent) clean energy industries (Figure 2).

[8] Connecticut's Official Government Website, Federal Bipartisan Infrastructure Law (BIL) and Inflation Reduction Act (IRA) Funding Updates, https://portal.ct.gov/deep/business-and-financial-assistance/federal-funding/bil-and-ira-updates.

[9] Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW). December 2023. Data accessed February 2025.

Figure 1: Clean Energy Employment in Connecticut, 2015-2023

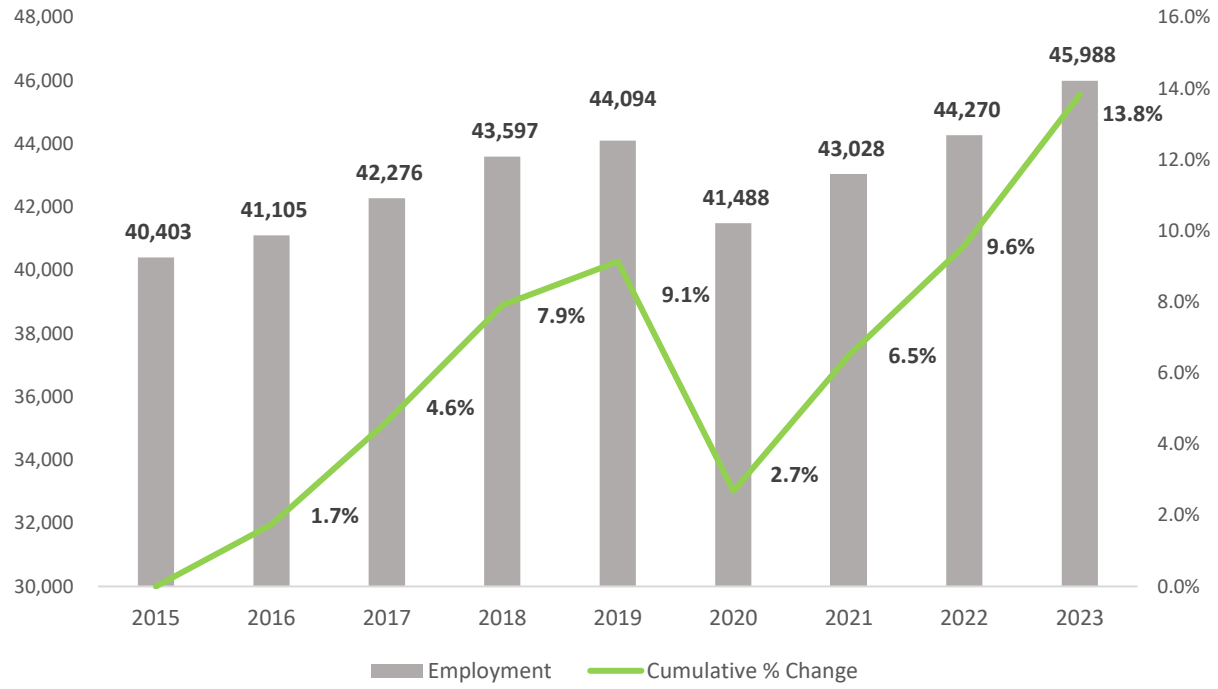
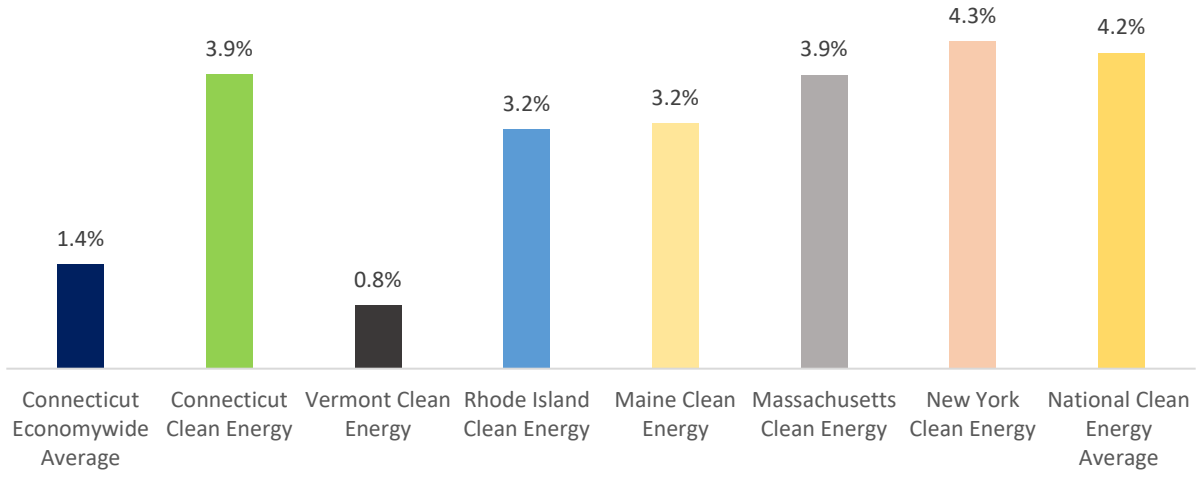


Figure 2: Clean Energy Employment Change, 2022-2023, Regional Comparison[10]



[10] National and state clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

The clean energy economy accounted for 2.4 percent, or $7.01 billion, of Connecticut's Gross Regional Product (GRP) in 2023. This is a 3.1 percent increase from 2022, which is a similar increase seen in the prior year (3.2 percent) (Figure 3 and Table 1).[11] Also similar to previous years, Professional and Business Services accounted for largest portion of total clean energy GRP contributions (40.2 percent) in Connecticut, followed by Manufacturing (25.7 percent) and Utilities (19.1 percent) (Table 1).

Aside from Construction and Other Services,[12] GRP contributions from all clean energy value chain components have increased from 2022 to 2023. The largest rise was from the Manufacturing value chain (8.8 percent), followed by Agriculture and Food (3.2 percent). Other Services experienced the largest decline of 5.8 percent (Table 1).

Figure 3: Clean Energy Contribution to Gross Regional Product (GRP), 2019-2023, Connecticut [13]

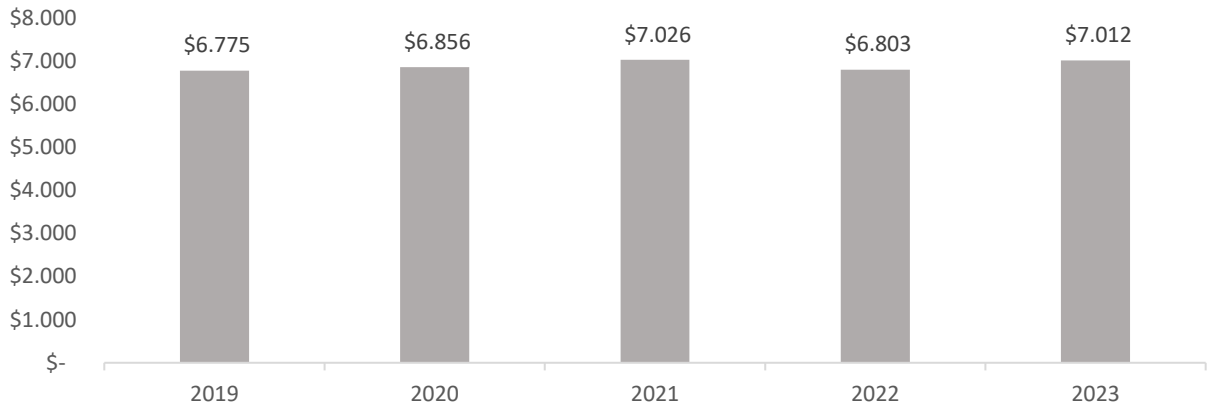


Table 1: Clean Energy Contribution to Gross Regional Product (GRP) by Value Chain, 2022-2023, Connecticut[14]

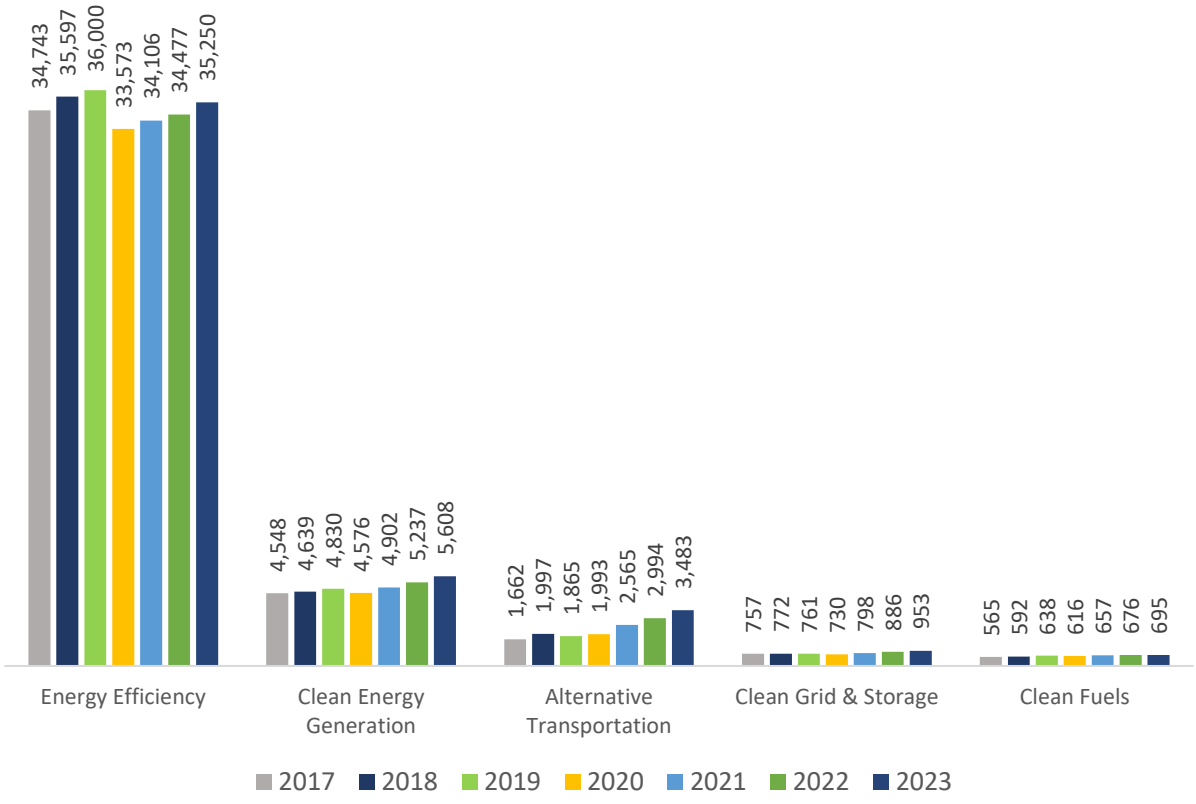
	2022 Clean Energy GRP	2023 Clean Energy GRP	% Change	Proportion
Professional and Business Services	$2.775	$2.818	1.5%	40.2%
Manufacturing	$1.655	$1.801	8.8%	25.7%

[11] Total Connecticut Gross Regional Product (GRP) from Bureau of Economic Analysis (BEA), 2023, real GRP in millions of chained 2017 dollars. Prior year data, 2019-2023, has been revised by BEA.
[12] The other services value chain is largely comprised of automotive repair and maintenance activities but also includes other non-automotive repair and maintenance activities in addition to organizational and non-profit work such as environment and conservation organizations, business associations, or advocacy organizations.
[13] Real Gross Domestic Product (GDP) by state revised by the Bureau of Economic Analysis (BEA) for the years 2019-2023. Figure 3 and Table 1 reflect the revised values, and therefore may have different values than what was reported in prior years of the Connecticut Clean Energy Industry Reports.
[14] U.S. Bureau of Economic Analysis, "SAGDP9N Real GDP by state"

Utilities	$1.312	$1.340	2.2%	19.1%
Construction	$0.484	$0.473	-2.3%	6.7%
Wholesale Trade	$0.542	$0.547	1.0%	7.8%
Other Services	$0.033	$0.031	-5.8%	0.4%
Agriculture and Forestry	$0.003	$0.003	3.2%	0.0%
TOTAL	**$6.803**	**$7.012**	**3.1%**	

Overall, each of the five major clean energy technology sectors experienced employment growth between 2022 and 2023. Like prior years, the highest employment growth rates were among Alternative Transportation technology sector jobs (16.3 percent), followed by Clean Grid Storage jobs (7.6 percent) and Clean Energy Generation jobs (7.1 percent). The greatest number of jobs (almost 800) were added to the Energy Efficiency technology sector, representing a growth rate of 2.2 percent (Figure 4).

Figure 4: Connecticut Clean Energy Employment by Technology Sector, 2017-2023



As of 2023, there are more than 4,500 clean energy establishments within Connecticut (Table 2). The largest concentration of these establishments are Energy Efficiency firms (87.7 percent). This is expected given the technology sector's concentration of clean energy jobs in the state. Energy Efficiency also had the largest increase in new establishments between 2022 and 2023, adding 76 new establishments to Connecticut clean energy economy (Table 2).

Table 2: Connecticut Clean Energy Establishments by Sector, 2017-2023

	2017	2018	2019	2020	2021	2022	2023
Energy Efficiency	3,677	3,728	3,833	3,771	3,860	3,909	3,985
Clean Energy Generation	223	241	258	247	261	273	278
Alternative Transportation	172	194	177	187	187	191	194
Clean Fuels	58	59	52	50	51	50	51
Clean Grid & Storage	28	31	27	29	32	33	34
TOTAL	**4,159**	**4,253**	**4,347**	**4,284**	**4,392**	**4,455**	**4,543**

Detailed Clean Energy Sector Employment

This section provides an overview of clean energy employment in Connecticut by major technology sector and sub-technology, or detailed technology. Each of the major technology sectors – Energy Efficiency, Clean Energy Generation, Alternative Transportation, Clean Grid and Storage, and Clean Fuels – includes multiple detailed technologies as seen in Table 3.

Table 3: Connecticut's Clean Energy Industry Definition[15]

Technology Sector	Detailed Technology
Energy Efficiency	High Efficiency HVAC & Renewable Heating and Cooling
	Traditional HVAC
	ENERGY STAR & Efficient Lighting
	Other
	Advanced Materials
Clean Energy Generation	Solar
	Nuclear
	Bioenergy & Combined Heat and Power
	Wind
	Traditional Hydropower
	Low-impact Hydropower
	Geothermal
Alternative Transportation	Hybrid Electric Vehicles
	Electric Vehicles
	Plug-In Hybrid Vehicles
	Natural Gas Vehicles
	Hydrogen and Fuel Cell Vehicles
Clean Grid & Storage	Storage
	Microgrid
	Other Grid Modernization
	Smart Grid
Clean Fuels	Other Biofuels
	Nuclear Fuels
	Woody Biomass
	Other Ethanol & Non-Woody Biomass

Energy Efficiency

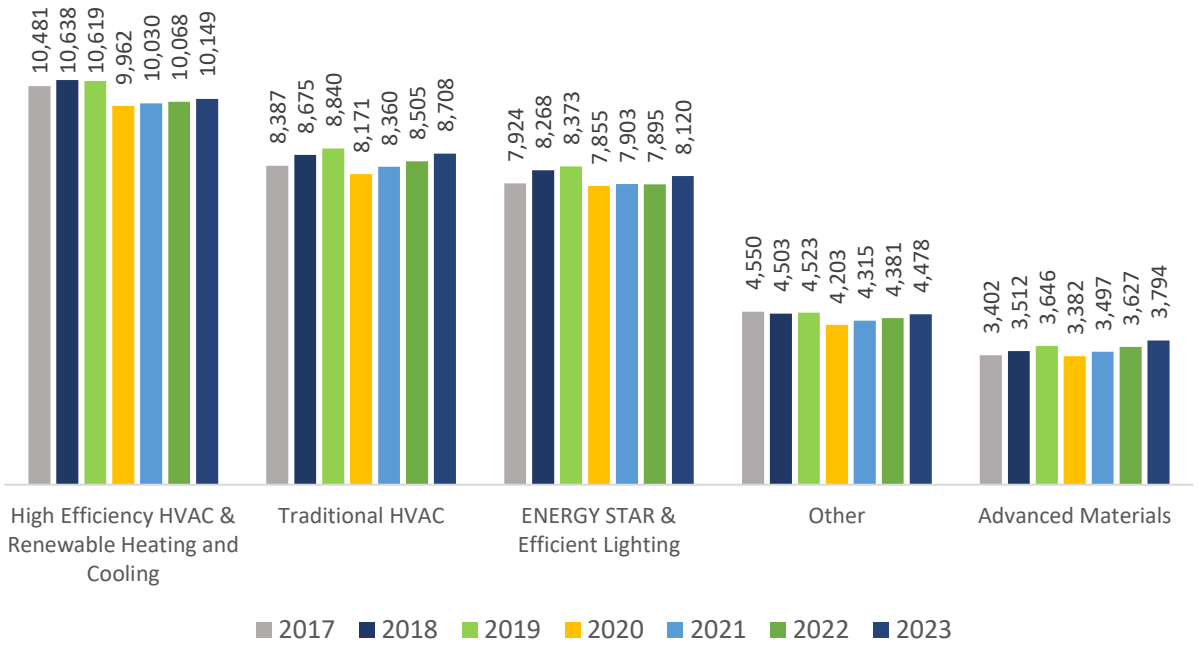
Within the Energy Efficiency (EE) technology sector, the High Efficiency HVAC & Renewable Heating and Cooling sub-technology continues to be the largest employer in the sector, representing 28.8 percent of total EE employment in 2023. Despite the large concentration, employment in this sub-

[15] For detailed definitions of detailed technologies, please see Appendix B.

sector remains below its 2019 pre-pandemic employment level, while the remaining sub-technologies have either surpassed 2019 employment or are closer to recovering than High Efficiency HVAC & Renewable Heating and Cooling (Figure 5).

From 2022 to 2023, EE employment in Connecticut grew by 2.2 percent, while nationally, this technology sector grew by 3.4 percent.[16] The ENERGY STAR & Efficient Lighting and Traditional HVAC sub-technology sectors added the greatest number of jobs in 2023, each adding over 200 jobs. Between 2022 and 2023, the Advanced Materials sub-technology had the fastest growth rate at 4.6 percent and almost 170 added jobs (Figure 5).

Figure 5: Connecticut Energy Efficiency Employment by Sub-Technology, 2017-2023[17]



Clean Energy Generation

Clean Energy Generation (CEG) employment in Connecticut grew by 7.1 percent from 2022 to 2023, outpacing national CEG growth (4.5 percent).[18] The Solar sub-technology added the largest number of jobs (272 jobs), growing 9.0 percent, and remains the largest employer within the CEG technology sector (Figure 6).

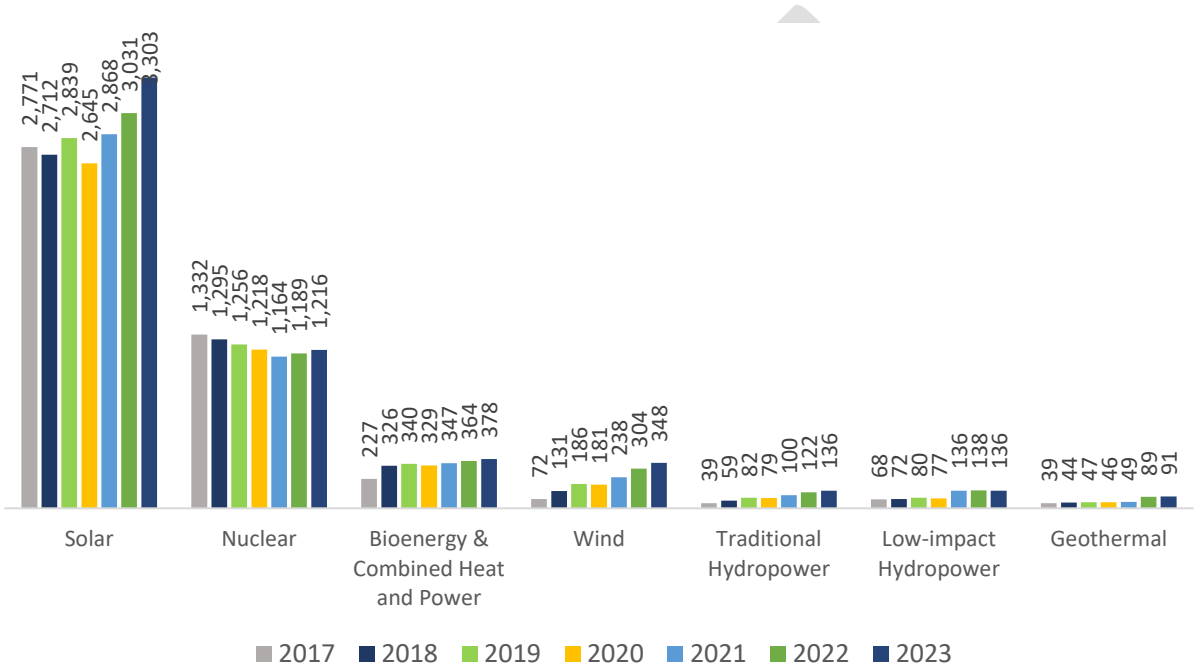
[16] National clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

[17] For detailed definitions of sub-technologies, please see Appendix B.

[18] National clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

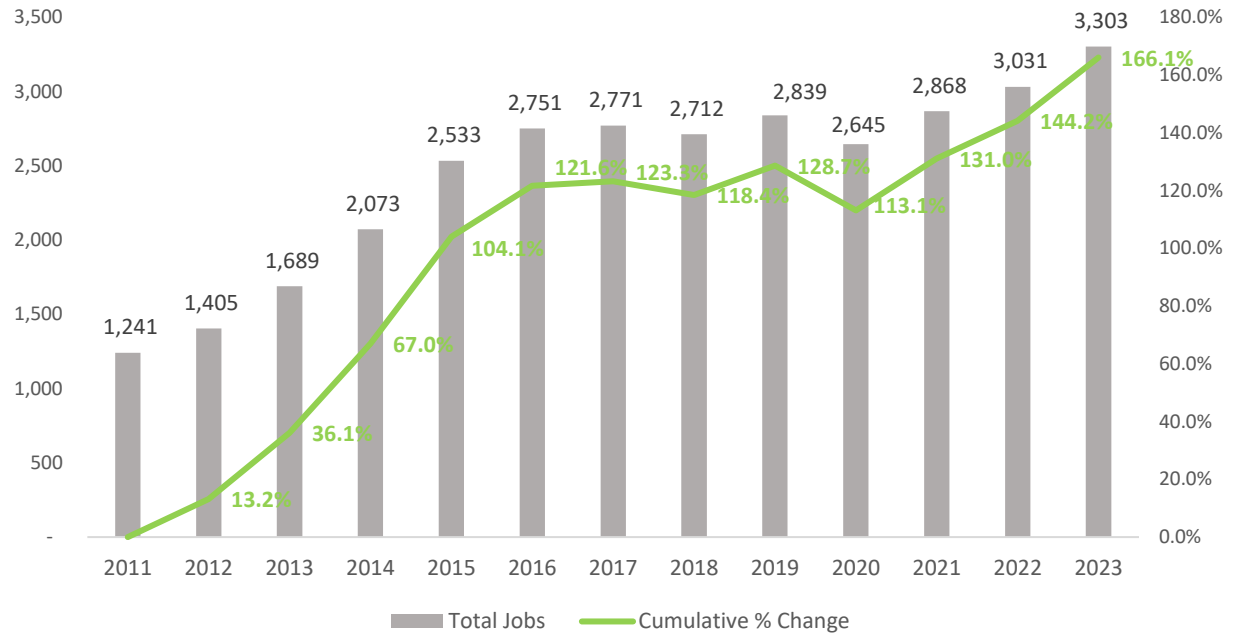
The Wind and Traditional Hydropower sub-technologies experienced the largest percentage increases in employment between 2022 and 2023, growing by 14.6 and 11.5 percent, respectively. Both of these growth rates outpaced Connecticut's overall CEG employment growth. The remaining sub-technologies experienced minor changes in employment but largely remained unchanged between 2022 and 2023 (Figure 6).

Figure 6: Connecticut Clean Energy Generation Employment by Sub-Technology, 2017-2023[19]



[19] For detailed definitions of sub-technologies, please see Appendix B.

Figure 7: Connecticut Solar Employment, 2011-2023



Alternative Transportation

Connecticut's Alternative Transportation (AT) technology sector grew by 16.3 percent between 2022 and 2023, outpacing the national growth of 9.6 percent.[20] The Hybrid Electric Vehicles sub-technology added the largest number of jobs (263 jobs), followed by Electric Vehicles (176 jobs). Both of these sub-technologies also had the largest employment growth rates (18.6 percent and 19.8 percent, respectively) and outpaced Connecticut's overall AT growth. The remaining sub-technologies grew from 2022 to 2023, but at much lower rates than Hybrid Electric Vehicles and Electric Vehicles (Figure 8).

Total Active EV registrations Connecticut grew by 46.8 percent from 2022 to 2023, reaching over 44,300 registrations by the end of 2023. This outpaced the increase of 41.2 percent seen the year prior, from 2021 to 2022 (Figure 9).

[20] National clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

Figure 8: Connecticut Alternative Transportation Employment by Sub-Technology, 2017-2022[21]

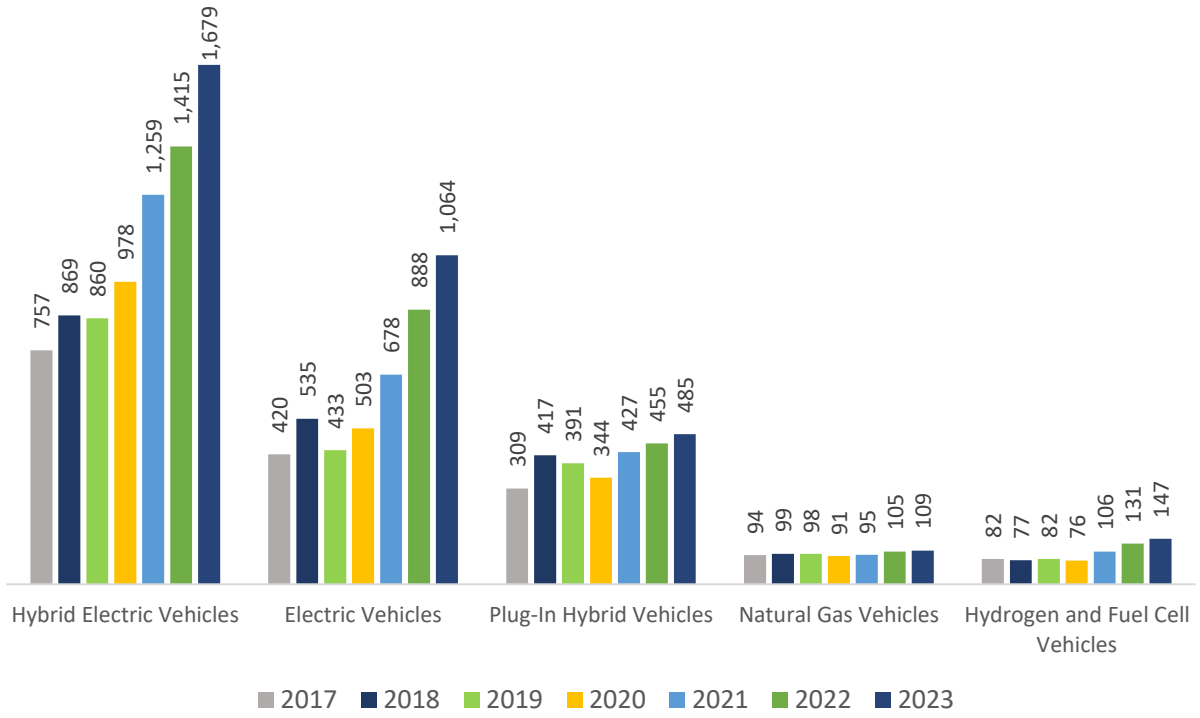
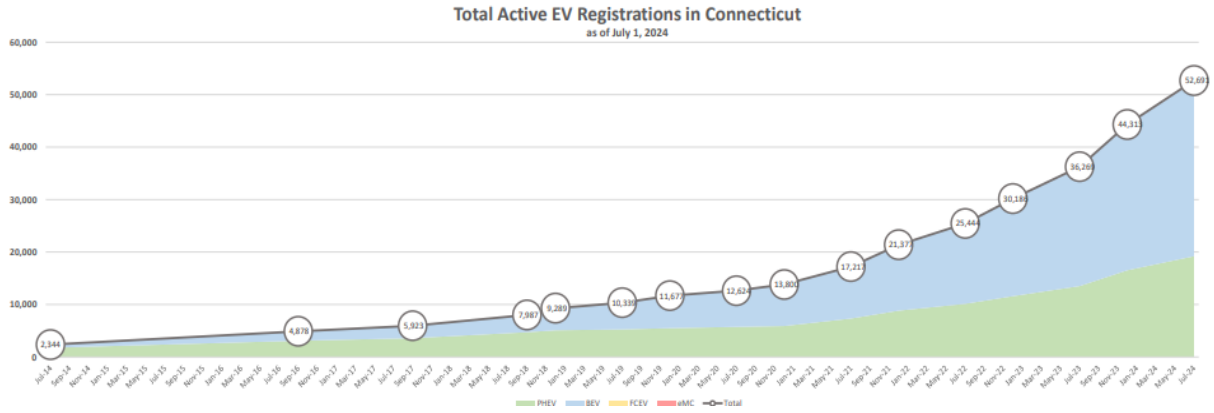


Figure 9: Totals Active EV Registrations in Connecticut[22]



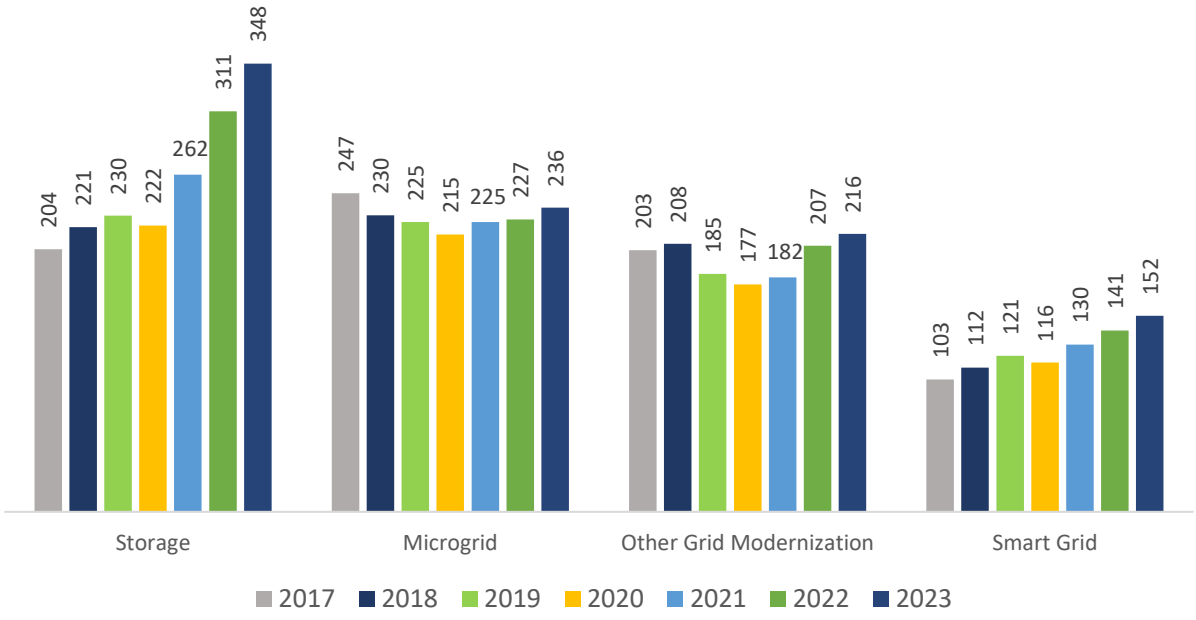
[21] For detailed definitions of sub-technologies, please see Appendix B.
[22] Connecticut's Official State Website, Expanded EV Registration Fact Sheet, https://portal.ct.gov/-/media/DEEP/air/mobile/CHEAPR/EV-Reg-Fact-Sheet.pdf.

Clean Grid & Storage

Connecticut's CGS technology sector operates within the state's broader Transmission, Distribution, and Storage (TDS) sector and includes workers who spend part or all of their time engaged with clean grid and storage technologies. As shown in the traditional energy Transmission, Distribution, and Storage section below, the overall TDS sector, which encompasses both clean and traditional energy jobs, is significantly larger than the CGS sector. However, some TDS workers classified as traditional energy workers may spend a small portion of their time on clean grid and storage technologies, such as smart grid technology.

Employment in Connecticut's Clean Grid and Storage (CGS) technology sector grew by 7.6 percent from 2022 to 2023, six percentage points higher than the national growth rate of this sector.[23] Each sub-technology within CGS experienced moderate employment increases, with the largest in the Storage sub-technology, adding 37 jobs and growing by 12.0 percent. Storage also remains the largest sub-technology in the sector (Figure 10).

Figure 10: Connecticut Clean Grid and Storage Employment by Sub-technology, 2017-2023[24]



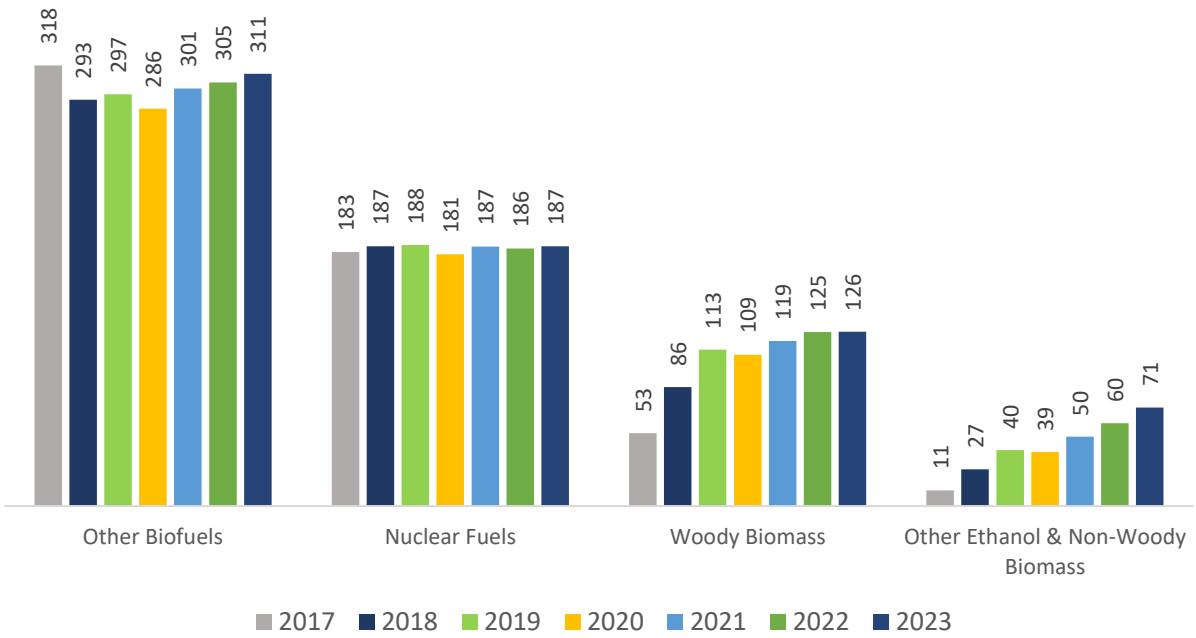
[23] National clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to Appendix B: Clean Energy Technology List and Definitions

[24] For detailed definitions of sub-technologies, please see Appendix B.

Clean Fuels

Connecticut's Clean Fuels (CF) technology sector experienced a modest employment increase of 2.9 percent since the 2023 CT CEIR, representing almost 20 added jobs. This growth in Connecticut was outpaced by the national CF technology sector which grew by 3.4 percent.[25] The largest employment increase was in the Other Ethanol and Non-Woody Biomass sub-technology, which added around 10 jobs. Other Biofuels remains the largest CF sub-technology, representing 44.8 percent of employment in 2023 (Figure 11).

Figure 11: Connecticut Clean Fuels Employment by Sub-Technology, 2017-2023[26]



Clean Energy Demographics

Connecticut's clean energy workforce saw little demographic change from 2022 to 2023 and remains less diverse than the state's overall workforce, the national clean energy workforce, and the broader U.S. workforce. Women, minorities, veterans, and workers aged 55 and over continue to be underrepresented in the sector.

However, since 2019, ethnic and racial diversity in Connecticut's clean energy industry has improved. The share of Hispanic or Latinx clean energy workers has increased by three percentage points from 2019 to 2023. Over the same period, the share of people of color within the clean

[25] National clean energy employment comparisons are all based on Connecticut's definition of clean energy. For further detail on Connecticut's clean energy industry definition, please refer to
[26] For detailed definitions of sub-technologies, please see Appendix B.

energy workforce also increased by three percentage points, driven by increases in Black or African American workers, Asian workers, and workers of two or more races (Table 4).

Table 4: Clean Energy Workforce Demographics, 2023[27]

	Connecticut Clean Energy, 2019	Connecticut Clean Energy, 2022	Connecticut Clean Energy, 2023	Connecticut Overall Workforce, 2023	U.S. Clean Energy, 2023	U.S. Overall Workforce, 2023
Male	72%	73%	73%	51%	72%	53%
Female	28%	27%	27%	49%	28%	47%
Hispanic or Latino	10%	13%	13%	18%	17%	19%
Not Hispanic or Latino	90%	87%	87%	82%	83%	82%
American Indian or Alaska Native	1%	<1%	<1%	<1%	1%	<1%
Asian	6%	7%	7%	6%	8%	7%
Black or African American	6%	7%	7%	14%	8%	13%
Native Hawaiian or other Pacific Islander	1%	<1%	<1%	<1%	1%	<1%
White	82%	79%	79%	78%	73%	76%
Two or more races	5%	6%	6%	2%	8%	3%
Veterans	11%	9%	9%	3%	10%	5%

[27] Demographic data retrieved from the United States Energy and Employment Report 2023 (USEER 2024); the Bureau of Labor Statistics: Current Population Survey, and Veterans News Release; as well as JobsEQ Population Demographics.

Clean Energy Value Chain Employment

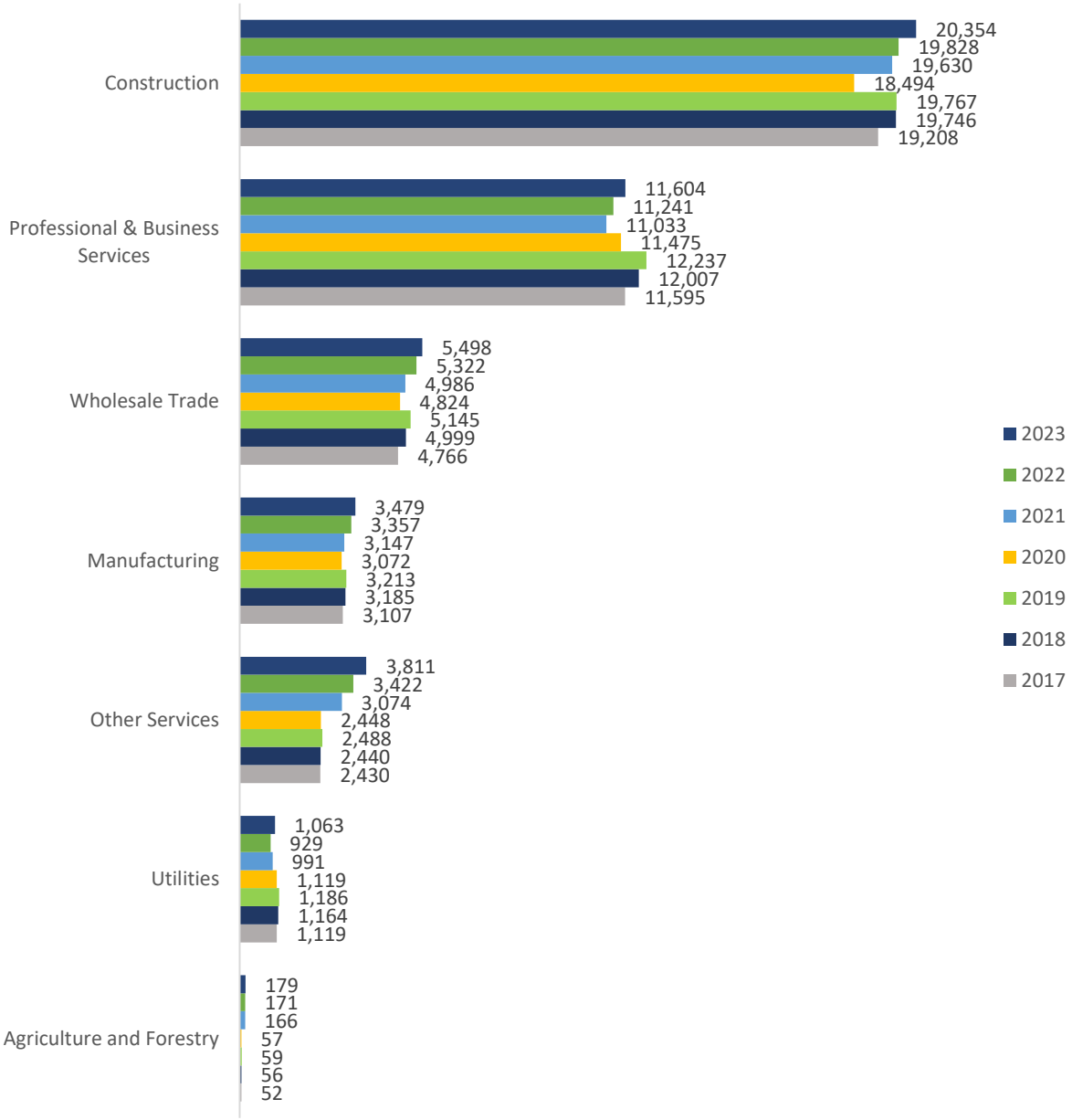
Clean energy value chain jobs present the industries in which clean energy activities are concentrated in Connecticut, providing insight into the types of policies and workforce development strategies needed to support employers statewide. Key value chain segments include Construction, Manufacturing, Wholesale Trade, Professional and Business Services, Other Services, Agriculture and Forestry, and Utilities.

Overall Clean Energy Value Chain Jobs

Between 2022 and 2023, employment grew across all clean energy value chain segments. Construction, the largest value chain segment, added the greatest number of jobs (526 jobs) over the last year, followed by Other Services (389 added jobs), and Professional and Business Services (364 added jobs). The remaining value chains experienced modest employment growths during the same time.

By 2023, nearly all value chain segments had recovered from pandemic-related job losses, with the exception of Utilities and Professional and Business Services. Employment in these two segments remains 5.2 and 10.3 percent below the respective 2019 pre-pandemic employment levels (Figure 12).

Figure 12: Clean Energy Employment by Value Chain Segment, 2017-2023



Clean Energy Value Chain Jobs by Sector

The Construction value chain represents approximately 44.3 percent of all clean energy jobs in Connecticut, with a strong concentration in the Energy Efficiency (EE) sector. In 2023, almost all (90.4 percent) of these Construction value chain jobs were part of the EE technology sector. Construction jobs also make up a significant portion (62.5 percent) of Clean Grid & Storage employment as well. Clean energy Construction job growth from 2022 to 2023 was largely driven by EE, which added almost 400 construction jobs over the last year.

Professional and Business Services accounts for one-quarter (25.2 percent) of Connecticut's clean energy workforce and also has a significant presence in the EE sector. More specifically, 29.0 percent of EE jobs are Professional and Business Services jobs. Among the 360 Professional and Business Services jobs added to Connecticut's clean energy industry between 2022 and 2023, almost two-thirds (63.1 percent) were jobs involved in EE technologies (Table 5 and Table 6).

Table 5: Connecticut Value Chain Employment by Clean Energy Technology Sector, 2023

	Clean Energy Generation	Clean Grid & Storage	Energy Efficiency	Clean Fuels	Alternative Transportation	TOTAL
Agriculture and Forestry	-	-	-	179	-	179
Utilities	1,063	-	-	-	-	1,063
Construction	1,358	596	18,400	-	-	20,354
Manufacturing	433	80	2,165	146	654	3,479
Wholesale Trade	535	49	3,831	313	771	5,498
Professional & Business Services	1,037	182	10,212	54	119	11,604
Other Services	1,182	46	642	2	1,939	3,811
TOTAL	5,608	953	35,250	695	3,483	45,988

Table 6: Value Chain Proportional Employment by Clean Energy Technology Sector, 2023, Connecticut

	Connecticut Clean Energy Average	Clean Energy Generation	Clean Grid & Storage	Energy Efficiency	Clean Fuels	Alternative Transportation
Agriculture and Forestry	0.4%	0.0%	0.0%	0.0%	25.8%	0.0%
Utilities	2.3%	19.0%	0.0%	0.0%	0.0%	0.0%
Construction	44.3%	24.2%	62.5%	52.2%	0.0%	0.0%
Manufacturing	7.6%	7.7%	8.4%	6.1%	21.0%	18.8%
Wholesale Trade	12.0%	9.5%	5.1%	10.9%	45.1%	22.1%
Professional & Business Services	25.2%	18.5%	19.1%	29.0%	7.7%	3.4%

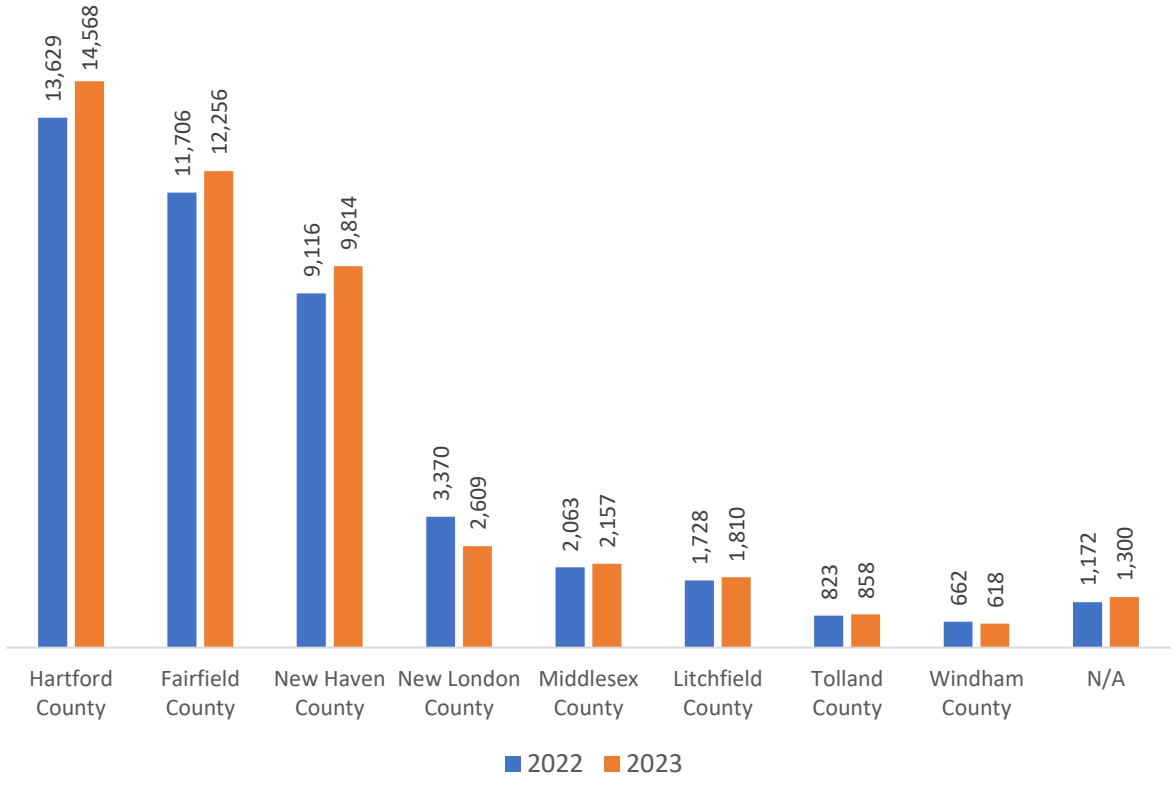
Other Services	8.3%	21.1%	4.9%	1.8%	0.4%	55.7%

Regional Clean Energy Employment

The geographic distribution of clean energy employment in Connecticut remained largely unchanged from 2022 to 2023, with Hartford, Fairfield, and New Haven Counties continuing to hold the largest shares of clean energy jobs in the state. Hartford County experienced the strongest growth, adding over 900 jobs, a 6.9 percent increase. New Haven and Fairfield Counties also saw significant gains, adding 698 and 550 clean energy jobs, respectively.

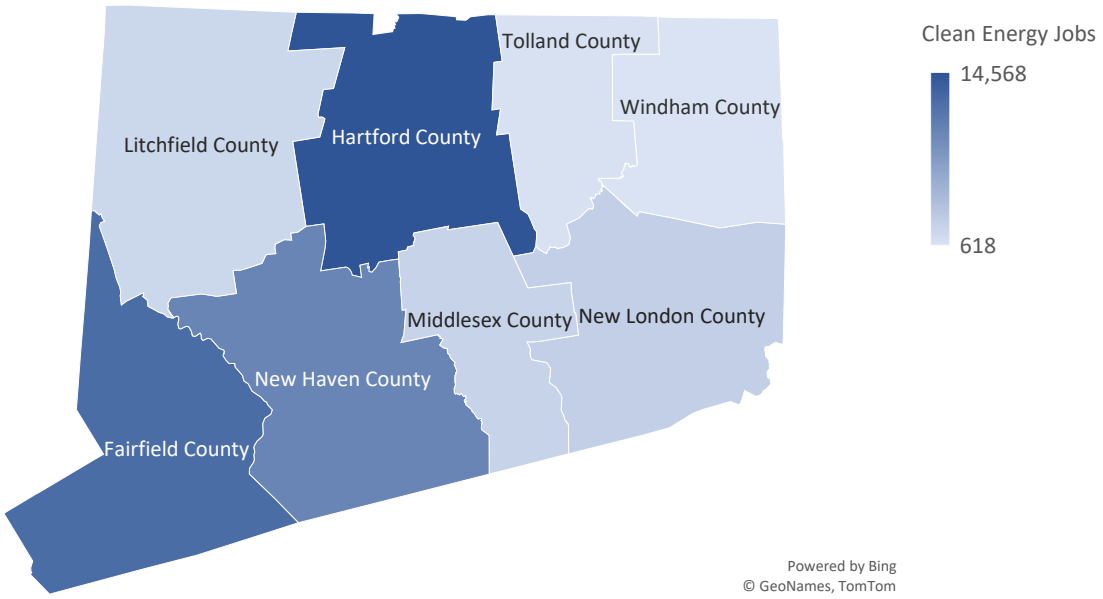
In contrast, New London County saw a sharp decline, losing more than 700 clean energy jobs, representing a 22.6% decrease in clean energy employment from 2022 to 2023 (Figure 13 and Figure 14).

Figure 13: Clean Energy Employment by County, 2023[28]



[28] Employment categorized as "n/a" could not be assigned to a single location.

Figure 14: Map of Clean Energy Employment by County, 2023



Connecticut Traditional Energy Industry Overview

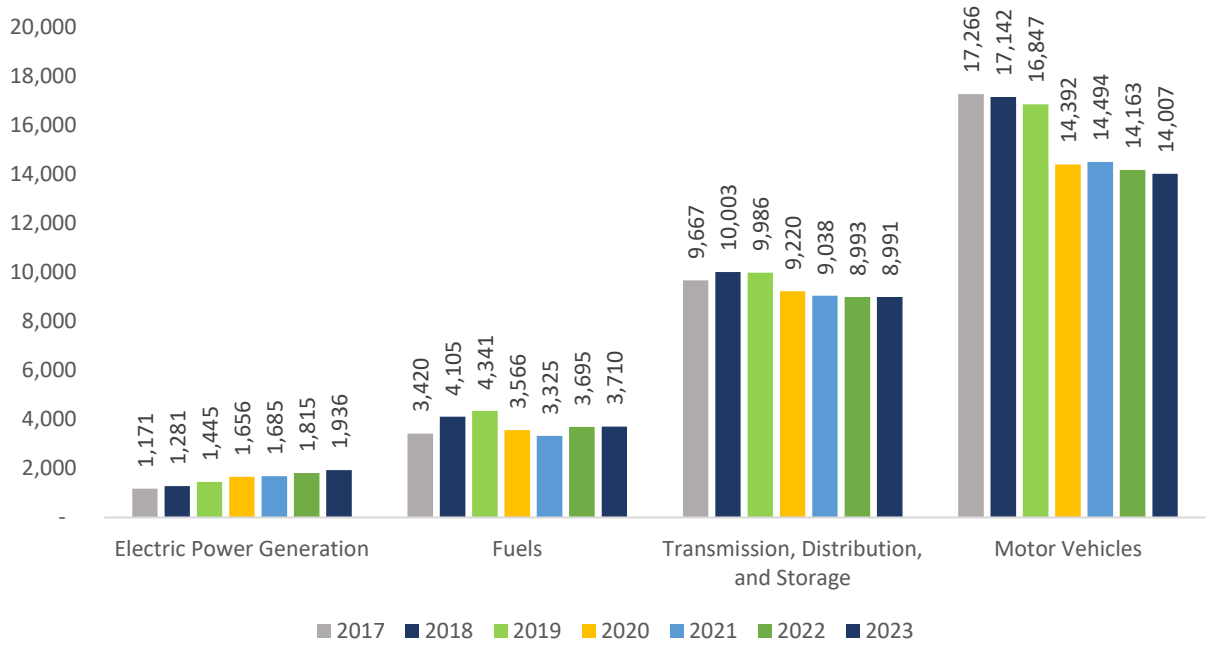
Overall Traditional Energy Jobs

In 2023, over 28,600 workers were employed in Connecticut's traditional energy industry, approximately 17,300 less workers than in the state's clean energy industry. The largest concentration of traditional energy jobs are within the Motor Vehicles technology sector, which represents 48.9 percent of traditional energy employment.

Since 2019, traditional energy employment In Connecticut has declined 9.1 percent, while clean energy employment grew 8.8 percent. While Motor Vehicles employs the greatest number of traditional energy workers in the state, it was also the primary driver behind industry's overall job losses from 2019 to 2023. Between 2022 and 2023, traditional energy employment remained relatively flat, losing only 24 jobs, or declining by less than a one percent (Figure 15).

Connecticut's smallest traditional energy sectors are Electric Power Generation and Traditional Fuels, primarily because the state does not produce traditional fossil fuels such as coal, oil, and natural gas.[29] Instead, workers in these sectors generate and distribute electricity using imported fuels and manage the storage of the generated electricity.

Figure 15: Connecticut Traditional Energy Employment by Sector, 2017-2023



[29] U.S. Energy Information Administration, Connecticut State Profile and Energy Estimates, December 2024, https://www.eia.gov/state/analysis.php?sid=CT

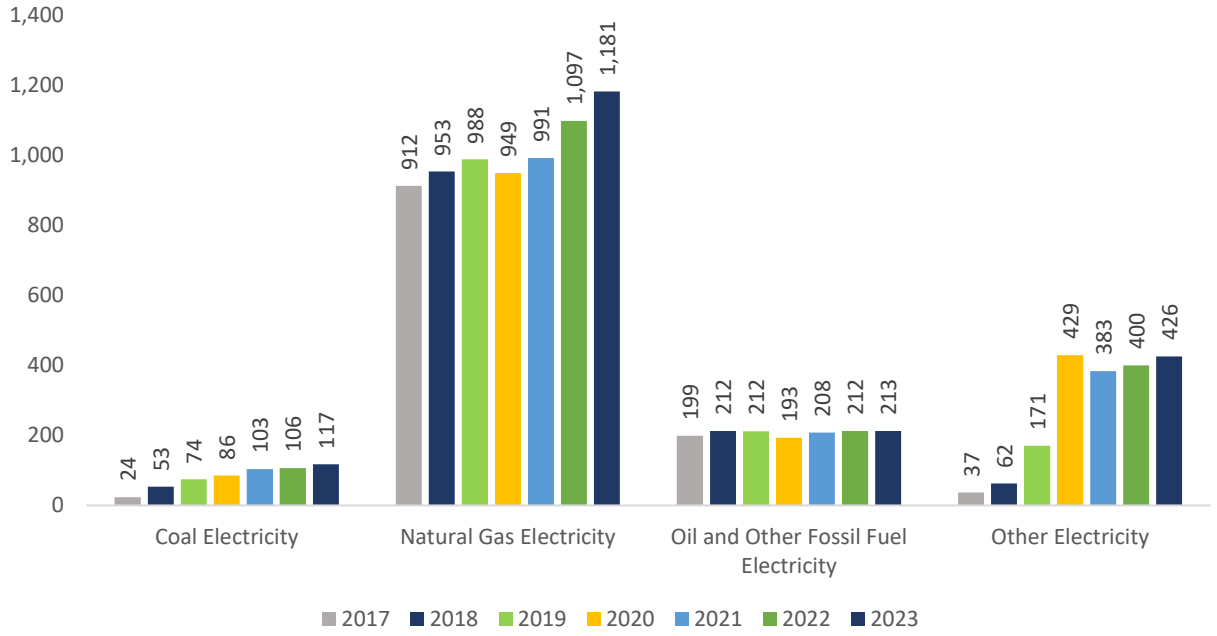
Detailed Traditional Energy Jobs

Electric Power Generation

Electric Power Generation (EPG) is the smallest sector within Connecticut's traditional energy industry and accounted for approximately 1,900 jobs, or 6.8 percent of employment in 2023. Since 2019, EPG grew by close to 500 jobs, or 34.0 percent. In fact, around 120 of these jobs were added over the past year, representing a 6.6 percent growth from 2022 to 2023.

Connecticut's traditional energy EPG workers are involved in the generation of electricity using imported fuels since the state does not have its own natural gas, crude oil, or coal reserves.[30] Within EPG, the Natural Gas Electricity sub-technology accounts for the largest share of employment (60.0 percent). From 2019 to 2023, this sub-technology added almost 200 jobs, growing by 19.6 percent. While Oil and Other Fossil Fuel Electricity employment remained stagnant during this period, Coal Electricity grew by 57.3 percent and Other Electricity more than doubled (Figure 16).

Figure 16: Connecticut Electric Power Generation Employment by Sub-Technology, 2017-2023



Traditional Fuels

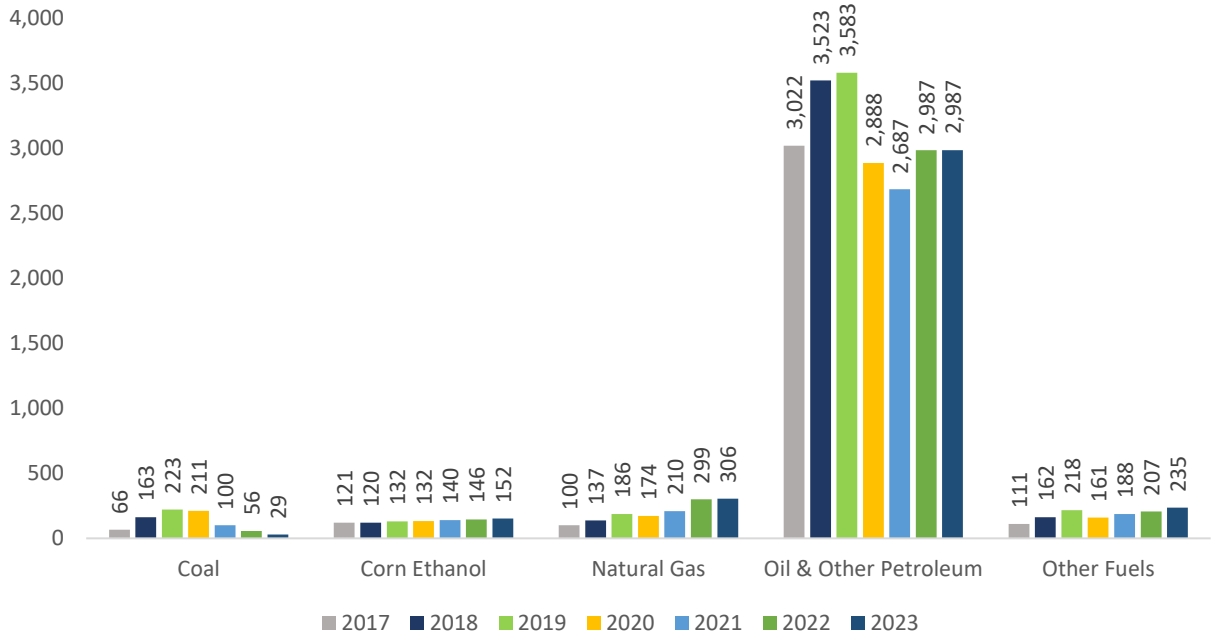
Although Connecticut is not a fossil fuel producer, the state's traditional fuel workers engage in the import, storage, and distribution of fossil fuels. Connecticut's Traditional Fuels (TF) sector

[30] U.S. Energy Information Administration, Connecticut State Profile and Energy Estimates, December 2024, https://www.eia.gov/state/analysis.php?sid=CT

represents 13.0 percent of the state's 2023 traditional energy employment. Between 2019 and 2023, the TF sector saw a decline of around 630 jobs, or 14.5 percent. Within the last year, from 2022 to 2023, there was virtually no change in employment.

Within Connecticut's TF sector, the largest sub-technology is Oil and Other Petroleum fuels, accounting for 8.5 percent of the sector's jobs in 2023. Since 2019, this sub-technology lost almost 600 jobs, representing 16.6 percent decline. Coal fuel employment also declined from 2019 to 2023, by close to 200 jobs (Figure 17).

Figure 17: Connecticut Traditional Fuels Employment by Sub-Technology, 2017-2023

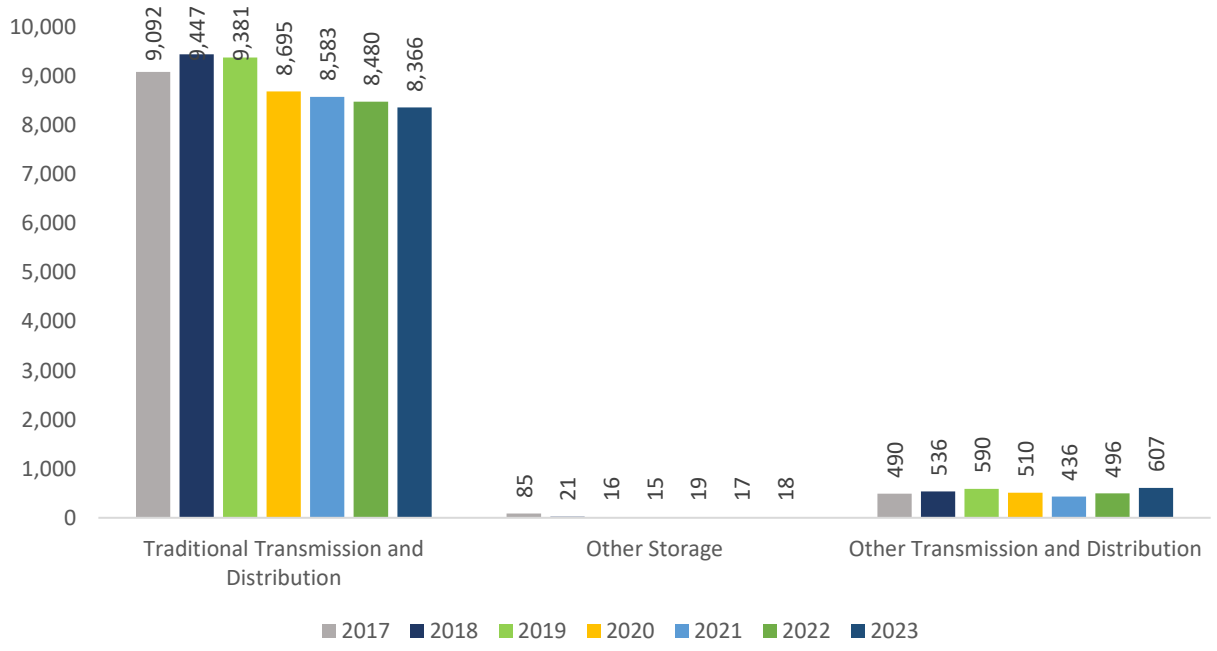


Transmission, Distribution, and Storage

Transmission, Distribution, and Storage (TDS) is the second largest sector in Connecticut's traditional energy industry, representing 31.4 percent of employment in 2023, or nearly 9,000 jobs. Since 2019, employment in TDS technology sector has declined by 10.0 percent, losing almost 1,000 jobs, but remained relatively flat over the last year.

Within Connecticut's TDS sector, Traditional Transmission and Distribution is largest sub-technology, accounting for 93.1 percent of the sector's total 2023 employment. It lost over 1,000 jobs between 2019 and 2023, while jobs in the other sub-technologies within TDS grew over the same time period (Figure 18).

Figure 18: Connecticut Transmission, Distribution, and Storage Employment by Sub-Technology, 2017-2023

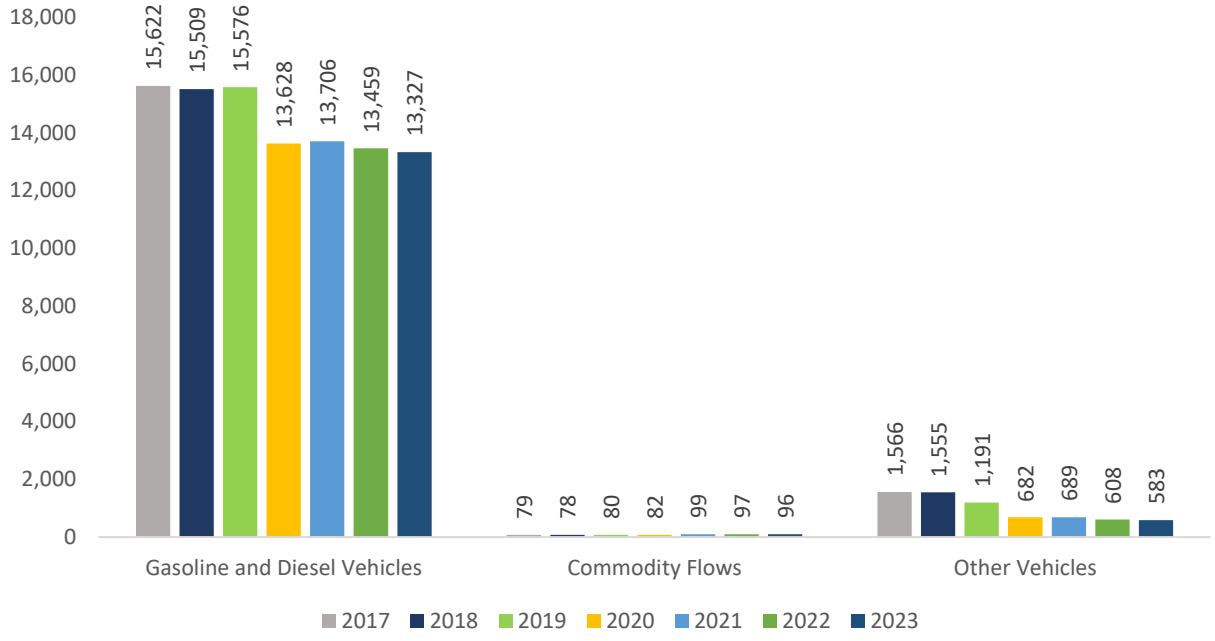


Motor Vehicles

The largest traditional energy sector in Connecticut is Motor Vehicles (MV). This sector accounts for almost half (48.9 percent) of total 2023 traditional energy employment in the state. Workers in this sector are primarily involved in the manufacture and trade of internal combustion engine vehicle components as well as the maintenance and repair of internal combustion engine vehicles.

From 2019 to 2023, Connecticut's traditional MV sector has experienced an employment decline of 16.9 percent, representing almost two-thirds (63.6 percent) of all traditional energy industry job losses in Connecticut during this time. Within the MV sector, the Gasoline and Diesel Vehicles and Other Vehicles sub-technologies drive this loss (Figure 19).

Figure 19: Connecticut Motor Vehicles Employment by Sub-Technology, 2017-2023



Appendix A: Methodology

Data for the 2024 Connecticut Clean Energy Industry Report comes from the 2024 U.S. Energy and Employment Report (USEER). The survey was conducted via phone and web, with phone interviews handled by ReconMR and the web survey programmed internally. To ensure data integrity, each respondent used a unique ID to prevent duplication.

A total of 593 business establishments in Connecticut participated, providing data to calculate industry incidence rates and distribute employment across industry categories—insights not available from state and federal labor market information agencies. The margin of error for incidence rates in Connecticut is ±3.99% at a 95% confidence level.

The full research methodology for USEER is available at:
https://www.energy.gov/sites/default/files/2024-10/USEER%202024%20Appendices_1002_0.pdf

Appendix B: Clean Energy Technology List and Definitions

The Connecticut Green Bank, Department of Energy and Environmental Protection, Eversource, and United Illuminating, operating through the Joint Committee, partnered with BW Research Partnership to define clean energy technologies in alignment with the state's clean energy policies.

Clean Energy employment in this report is categorized into five major clean energy sectors:

1. Energy Efficiency
2. Clean Energy Generation
3. Alternative Transportation
4. Clean Grid & Storage
5. Clean Fuels

A clean energy job includes any role directly involved in the research, development, production, manufacturing, distribution, sales, implementation, installation, or repair of components, goods, or services related to these sectors. It also includes supporting services such as consulting, finance, tax, and legal services related to clean energy.

Connecticut's clean energy sub-technologies, listed below, were selected based on their alignment with state-specific clean energy policies.[31]

Energy Efficiency:

- ENERGY STAR Certified Appliances, excluding HVAC
- ENERGY STAR Certified Heating Ventilation and Air Conditioning (HVAC), including boilers and furnaces with an AFUE rating of 90 or greater and air and central air conditioning units of 15 SEER or greater
- Traditional HVAC goods, control systems, and services34
- ENERGY STAR Certified Electronics (TVs, Telephones, Audio/Video, etc.)
- ENERGY STAR Certified Windows and Doors
- ENERGY STAR Certified Roofing
- ENERGY STAR Certified Seal and Insulation
- ENERGY STAR Certified Commercial Food Service Equipment
- ENERGY STAR Certified Data Center Equipment
- ENERGY STAR Certified LED Lighting
- Other LED, CFL, and Efficient Lighting
- Solar Thermal Water Heating and Cooling
- Other Renewable Heating and Cooling (geothermal, biomass, heat pumps, etc.)

[31] Detailed major technology sector and sub-technology definitions are available at: https://www.energy.gov/sites/default/files/2024-10/USEER%202024%20Appendices_1002_0.pdf

- Advanced Building Materials/Insulation
- Recycled Building Materials
- Reduced Water Consumption Products and Appliances
- Other Energy Efficiency[32]

Clean Energy Generation

- Solar Photovoltaic Electric Generation
- Concentrated Solar Electric Generation
- Wind Generation
- Geothermal Generation
- Bioenergy/Biomass Generation
- Low-Impact Hydroelectric Generation, including Wave/Kinetic Generation
- Traditional Hydroelectric Generation
- Nuclear Generation
- Combined Heat and Power

Alternative Transportation

- Hybrid Electric Vehicles
- Plug-In Hybrid Vehicles
- Electric Vehicles
- Natural Gas Vehicles
- Hydrogen Vehicles
- Fuel Cell Vehicles

Clean Grid & Storage

Electric Power Transmission and Distribution

- Smart Grid
- Microgrids
- Other Grid Modernization[33]

Storage

- Pumped Hydropower Storage
- Battery Storage, including battery storage for solar generation
    - Lithium Batteries

[32] Other Energy Efficiency includes any energy efficiency that is not captured in the categories listed previously or a category that is used when unable to split employment into a single energy efficiency category.

[33] Other Grid Modernization includes other modernization of Connecticut's electricity transmission and distribution system to maintain a reliable and secure electricity infrastructure that can meet future demand growth.

  - Lead-Based Batteries
  - Other Solid-Electrode Batteries
  - Vanadium Redox Flow Batteries
  - Other Flow Batteries
- Mechanical Storage, including flywheels, compressed air energy storage, etc.
- Thermal Storage
- Biofuels, including ethanol and biodiesel
- Nuclear Fuel

Clean Fuels

- Woody Biomass/Cellulosic Biofuel
- Nuclear Fuel
- Other Ethanol/Non-Woody Biomass, including biodiesel
- Other Biofuels[34]

[34] Other Biofuels includes other fuel derived directly from living matter.

Appendix C: Traditional Energy Technology List and Definitions

Electric Power Generation

- Natural Gas Electricity
- Coal Electricity
- Oil and Other Fossil Fuel Electricity
- Other Electricity[35]

Transmission Distribution and Storage

- Traditional Transmission and Distribution
- Other Transmission and Distribution[36]
- Other Storage[37]

Fuels

- Oil and Other Petroleum
- Natural Gas
- Corn Ethanol
- Coal
- Other Fuels[38]

Motor Vehicles

- Gasoline and Diesel Vehicles
- Other Vehicles[39]

[35] Any generation that is not captured in the categories previously listed or a category that is used when unable to split employment into a single category.

[36] [38] Any transmission, distribution, and storage that is not captured in the categories listed previously or a category that is used when unable to split employment into a single transmission, distribution, and storage category.

[38] Any fuel that is not captured in the categories listed previously or a category that is used when unable to split employment into a single fuel category.

[39] Other Vehicles includes any motor vehicle technology that is not captured in the categories listed previously or a category that is used when unable to split employment into a single motor vehicle category.

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