The Greenhouse Gas Reduction Act
2019 Draft Plan

Presentation for the MDE Public Comment Meetings
Maryland Law ("GGRA"): Reduce GHGs 25% by 2020 and 40% by 2030

The GGRA requires MDE to develop a plan to meet the GHG goals. That plan draws upon existing programs across all levels of government, and new state programs.

Major Mitigation Programs

Electricity Supply
Renewable Portfolio Standard (current)
Clean and Renewable Energy Standard (proposed)
Regional Greenhouse Gas Initiative (RGGI)

Building Energy Use
EmPOWER Maryland
Compact Development
State Building Efficiency EO

Transportation
Public Transit & other infrastructure
Electric Vehicles: Clean Cars & ZEV Mandate
50% ZEV Transit Buses by 2030
Smart Growth & Compact Development
Transportation and Climate Initiative (TCI) could fund & enable other measures.

Short-lived Climate Pollutants
HFC regulation
Methane regulation
Sustainable Materials Mgmt

Carbon Sequestration
Forest Management Programs
Healthy Soils Program
Electricity Supply Programs

Electricity strategy: incentivize clean energy and cap emissions from fossil energy.

- **CARES**
  - Bill proposed for this session; example impacts in the 2019 GGRA Draft Plan
  - Builds upon existing RPS; 100% Clean Electricity by 2040

- **RGGI**
  - Carbon cap on power plants and state investment in clean energy (10 states participate)
  - Growing to more states: NJ renewed participation, VA promulgated a reg (on hold), and PA drafting reg now.

Maryland electricity generation and imports in GGRA Draft Plan through 2030. CARES and RGGI reduce fossil generation and increase clean & renewable generation.

**Analysis assumes no new nuclear or carbon capture before 2030**
Buildings Programs

**Buildings strategy:** use efficiency to counteract growth & convert heating systems to run on increasingly clean electricity.

- **Efficiency:**
  - EmPOWER beyond 2023
  - Achieve State Building Efficiency Goal
  - Achieve Compact Development Goal

- **Electrification:**
  - Increase use of efficient electric heat pumps for building heat, perhaps using EmPOWER incentives.
Transportation Programs

Transportation strategy:

**Reduce vehicle miles traveled** AND **deploy electric vehicles** that run on increasingly clean electricity

- Transit Investments
- Intercity Transportation
- Active Transportation (e.g., bike lanes)
- Compact Development
- Clean Cars Program & ZEV mandate
- 50% ZEV Transit Buses by 2030
- Transportation and Climate Initiative
Sequestration Programs

Forest management, tree planting, and Healthy Soils programs (DNR & MDA) accelerate carbon sequestration in forests and agricultural soils, adding benefit on top of emission reduction programs.

GGRA Draft Plan Employment Results

• GGRA requires positive economic impacts.

• The Draft Plan drives substantial job gains.

• Almost all of MD’s fossil fuel comes from out of state.

• Investments that reduce fossil fuel consumption drive positive impacts for MD’s economy.

Large transportation projects drive substantial job gains in the near-term; investments in in-state clean energy and fuel-saving measures provide more modest underlying gains. (Transportation gains dependent on Federal funding)
MDE analyzed a scenario that achieves 80% reduction by 2050 ("Scenario 2")

Important long-term measures included: renewable natural gas, other advanced biofuels, electric or other zero-emission heavy trucks and non-road vehicles.
Long Term Challenges

Scenario 2 identified important long-term measures that should be re-evaluated as technologies mature, but are currently expensive.

These measures may be necessary for deeper reductions, and may be cost-effective when the time comes. In the meantime, the Draft Plan focuses on measures necessary for 2030.
Public Comment & Outreach

- **Read the GGRA Draft Plan** out for comment now:
- MDE holding series of public meetings around the state:
  - 12/3: Chesapeake College, Queenstown (Complete)
  - 12/17: MDE HQ, Baltimore (Complete)
  - 1/10: Frostburg State University, Frostburg (Complete)
  - 1/14: Charles County Govt Building, La Plata (Complete)
  - 1/29: Webinar
  - 1/31: MDE HQ, Baltimore
  - 2/12: Webinar
  - 3/4: Webinar
  - More meetings TBD

Meeting details are in [our website](#).
Contacts

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Website:
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The 2019 GGRA Draft Plan

• MDE has proposed the 2019 GGRA Draft Plan
  – In coordination with other state agencies and stakeholders
  – Must achieve Maryland’s goal of reducing greenhouse gas (GHG) emissions by **40 percent** by 2030 from a 2006 baseline
    • More ambitious than the Paris Climate Accord goal of 26% to 28% reduction by 2025
  – Must also benefit the State’s economy and creates jobs

• Sets Maryland on a path to achieve the States ambitious GHG emissions reduction goal for 2030 and to achieve much deeper reductions in the 2040 to 2050 time frame

• Serves as an example for the nation showing how state action can reduce the threat of climate change while growing the economy and creating jobs
Key Results - Quick Snapshot

- Comprehensive suite of over 100 measures that provides a plan, which if fully implemented:
  - Will achieve GHG reductions greater than 40 percent; about 44% by 2030
  - Puts the State on a path to achieve significantly deeper reductions by 2050
  - Will achieve as much as $11.54 billion in increased economic activity and over 11,000 new jobs by 2030
  - Drive investments in energy efficiency and clean and renewable energy
  - Advance widespread adoption of electric vehicles
  - Supports new industries and technologies
  - Improve management of forests and farms to sequester more carbon in trees and soils

- There is still work to be done to finalize the draft plan
  - Programs can still be added, modified and improved
  - Adjustments to the entire plan can still be made, if needed
Outreach and Stakeholder Input

• Before finalizing the 2019 GGRA Plan, Maryland will be undertaking a significant stakeholder process to ensure that opportunities exist for the interested parties to provide additional input on the draft plan

• Maryland invites comment on:
  – The measures that are being counted on to reduce emissions
  – Potential new programs
  – The emissions and economic analyses
  – Opportunities to better address social equity issues
  – Other aspects included within the draft plan

• Maryland will consider these comments in the development of the final 2019 GGRA Plan
Largest Contributing Emission Sectors

• The principal sources of GHG emissions in Maryland are:
  – Electricity consumption
    • **30 percent** of Maryland’s gross GHG emissions in 2017;
  – Transportation
    • **40 percent** of Maryland’s gross GHG emissions in 2017;
  – Residential, commercial, and industrial (RCI) fossil fuel use
    • **18 percent** of Maryland’s gross GHG emissions in 2017.
Analysis Tools: GHG Emissions

E3’s PATHWAYS tool, customized for Maryland

- Model of all energy consuming stock in the state
- Captures interactions among programs and sectors:

### Light Duty Auto Sales

- Gasoline
- Diesel
- PHEV
- Electric Vehicle

### Electricity Demand by Sector

- Transportation
- Industry
- Commercial
- Residential

Modeling documentation in Appendix F
Sensitivity Analyses

• What if:
  – The Federal government rolls back vehicle standards?
  – Consumer adoption of EVs is half of what we modeled?
  – Consumer adoption of efficient appliances is half of what we modeled?
  – All of those things happen at once?

We still meet the 2030 goal, but without as much extra reduction.
Economic Impacts

The 2019 GGRA Draft Plan achieves the 2030 goal with significant benefit to the state’s economy.

<table>
<thead>
<tr>
<th>MD impact relative to Reference Case</th>
<th>Through 2030</th>
<th>Through 2050</th>
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</thead>
<tbody>
<tr>
<td>Average job impact*</td>
<td>+ 11,649 job-years</td>
<td>+ 6,703 job-years</td>
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<tr>
<td>GDP Impact**</td>
<td>+ $ 11.54 billion</td>
<td>+ $ 18.63 billion</td>
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<tr>
<td>Personal Income Impact**</td>
<td>+ $ 10.04 billion</td>
<td>+ $ 15.67 billion</td>
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<tr>
<td>Avoided Mortality**</td>
<td>+ $ 0.74 billion</td>
<td>+ $ 4.79 billion</td>
</tr>
<tr>
<td>Avoided Climate Damages**</td>
<td>+ $ 4.30 billion</td>
<td>+ $ 27.11 billion</td>
</tr>
</tbody>
</table>

* Average number of job-years created or sustained each year.
** 2018 Dollars, Cumulative, Net Present Value using 3% discount rate.
Climate damage evaluated using Federal Social Cost of Carbon (2015 Update)
REMIX model, run by Towson’s Regional Economic Studies Institute:

• Captures effect on Maryland’s economy from:
  – Up-front capital costs from programs and measures;
  – The savings enjoyed by consumers and businesses from energy efficiency, EVs, and other clean energy measures;
  – Transportation and clean energy infrastructure projects; and
  – Improvements in public health.

Modeling documentation in Appendix G.
Equity in the 2019 GGRA Draft Plan

• Full Chapter in the draft plan addressing social equity

• MDE, MDH, and DNR have all participated in multiple meetings with overburdened communities throughout 2017 and 2018.
  – MDE’s meetings have focused on mitigation strategies while DNR and MDH have addressed resiliency, and the public health implications of climate change.

• Draft plan includes multiple efforts that help these communities. Examples include:
  – Low income ratepayer relief through RGGI, MEA and DHCD programs that provide low income support for energy efficiency and renewable energy, and more
Modeling and Analysis of Equity Issues

- Projected job creation mostly in professions requiring some education, but not advanced degrees.
- Projected job creation mostly in middle-income professions

Draft Plan also breaks down impacts by geography, industry, and ethnicity.
Meeting Longer-Term Goals (2040, 2050 and Beyond)

- GGRA requires incremental emission reduction steps intended to demonstrate progress towards a much deeper long-term goal.
  - 25% by 2020, 40% by 2030
  - Also includes non-binding aspirational goals of 80 percent to 95 percent GHG reduction in the 2050 time frame.

- The MDE modeling included analyses of 2050 and identified strategies and technologies to continue to analyze as part of the States effort to achieve deeper reductions.
Conclusions from 2050 Analysis in GGRA Draft Plan

• Identified several measures and technologies to monitor as they become available & economical.

• Many should be deployed in the future.

• Many policies cannot be precisely specified multiple decades out.

• Difficult to demonstrate positive economic impacts with new or speculative technologies, whose cost is very high, and very uncertain.
Long Term Goals

MDE analyzed a scenario that achieves 80% reduction by 2050 (“Scenario 2”)

Important long-term measures included: renewable natural gas, other advanced biofuels, electric or other zero-emission heavy trucks and non-road vehicles.
Scenario 2 identified important long-term measures that should be re-evaluated as technologies mature, but are currently expensive.

These measures may be necessary for deeper reductions, and may be cost-effective when the time comes. In the meantime, the Draft Plan focuses on measures necessary for 2030.
## Policy Scenario 2 Measures

**Compared to The Draft Plan ("PS4")**

**Near Complete Electrification:**

- Accelerated light duty ZEV sales by 2030 (same 100% by 2050 as PS4)
- Accelerated heavy duty EV and Diesel Hybrid Sales (95% by 2050)
- Electrification of non-road vehicles (50% construction EVs by 2050)
- Aggressive building electrification (95% Heat Pump sales by 2050)

**Near Complete Decarbonization:**

- Continued RGGI cap decline through 2050 (90% reduction 2020-2050)
- Aggressive deployment of renewable natural gas and advanced biofuels (25% biomethane by 2050 and 63% renewable diesel by 2050)
- More aggressive energy efficiency (100% efficient appliance sales by 2030; additional savings in industrial sector)
Policy Scenario 2 Measures
Light Duty and Heavy Duty ZEVs

Increased Sales of ZEVs

- New sales of LDV EVs and PHEVs gradually increase to 50% by 2030 and 100% by 2050
  - 270,000 ZEVs by 2025, 800,000 ZEVs by 2030, 5,000,000 ZEVs by 2050

- Combined Electric and Diesel Hybrid HDVs sales increases to 40% by 2030, 95% by 2050
  - 5,700 HDV EVs by 2030, 72,000 EVs by 2050
  - 5,700 Diesel Hybrid by 2030, 83,000 by 2050
Policy Scenario 2 Measures
Renewable NG and Advanced Biofuels

- E3 performed biofuel feedstock analysis for supply and cost of biofuels
- Deployed to reduce non-electrified transportation and building emissions to hit 80-by-50

Quantity and market-clearing price of biofuels in Policy Scenario 2

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<tbody>
<tr>
<td>2050</td>
<td>Renewable Diesel</td>
<td>56</td>
<td>$42.8</td>
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<td>2050</td>
<td>Renewable Natural Gas</td>
<td>17</td>
<td>$16.5</td>
<td>$5.1</td>
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</table>

Biofuels consumption by sector in PS2 in 2050

- 63% renewable diesel of total diesel consumption
- 25% renewable NG of total NG consumption
Additional efficiency, electrification, and biofuels further reduce transportation and building GHGs.

But they violated economic impact restrictions, given current high cost of many measures (esp. new technologies).

Some also very uncertain to achieve given currently available policies (e.g. even more LDV EVs).

That doesn’t mean we shouldn’t pursue those measures in the future.

*Non Energy includes Agriculture, Waste Management, Industrial Processes and Fossil Fuel Industry emissions*
Conclusions from 2050 Analysis in GGRA Draft Plan

- Identified several measures and technologies to monitor as they become available & economical.
- Many should be deployed in the future.
- Many policies cannot be precisely specified multiple decades out.
- Difficult to demonstrate positive economic impacts with new or speculative technologies, whose cost is very high, and very uncertain.
• The draft plan includes a Just Transition report:
  – Inventories fossil fuel-dependent jobs throughout Maryland
  – Identifies transition opportunities for dependent job categories that have:
    1. Similar skill sets
    2. Expected future growth
  – Estimates fiscal impact from fossil fuel dependent firm closures
Adaptation and Resiliency

• Climate change impacts are already being felt in some places in Maryland, and include:
  – Increased risk for extreme events such as drought, storms, flooding, and forest fires;
  – More heat-related stress;
  – The spread of existing or new vector-borne disease or shifts in public health challenges due to climate-driven stressors; and
  – Increased erosion and inundation of low-lying areas along the state’s shoreline and coast.

• Climate change raises the stakes in managing these problems by changing their frequency, intensity, extent, and magnitude.
Adaptation and Resiliency

Climate change adaptation is an extremely complex process and there is no single means of response.

Maryland is taking major action to address a wide range of climate impacts to multiple sectors. Programs are being implemented to address issues in the following areas:

- Bay and aquatic environments;
- Agriculture;
- Human health;
- Water resources;
- Population growth;
- Infrastructure;
- Forest and terrestrial ecosystems; and
- Coastal zone.
The Clean and Renewable Energy Standard (CARES)

- **100 percent Clean Electricity by 2040**
  - Requires that 100 percent of Maryland’s electricity come from clean sources by 2040.
  - Among the most ambitious goals in the nation.

- **A major component of the 2019 GGRA Draft Plan to reduce GHG emissions from electricity generation.**
  - Requires that an increasingly large share of Maryland’s electricity be generated by zero- and low-carbon resources.
  - Will build upon the progress we’ve already made in cleaning up our electricity grid under RGGI ... Builds from the Clean Energy Jobs Act
  - Steers clear of unacceptable impacts to farms, forests and watersheds

- **Market Based, Technology-Neutral ... Focus on Home Grown Jobs**
  - Would adopt a technology-neutral approach to achieving 100 percent clean electricity at the lowest cost. Will foster greater competition among available renewable and clean energy resources
  - Would reduce costs for ratepayers.
  - Would focus on home grown energy and in-state job creation
Strengthened RGGI

• Under Maryland’s leadership ... in 2017 ... RGGI was strengthened to achieve an additional 30 percent reduction in power plant emissions by 2030.

• MDE (as Chair of RGGI) also led deliberations to broaden participation in RGGI to include other states
  – Virginia also finalized regulations, but are unable to participate in 2020 due to budget restrictions.
  – Just a few weeks ago, Pennsylvania’s Governor Wolf announced their intent to join RGGI
  – Other states have taken important steps that could lead to future participation.

• Expanding the program to new participating states in the region will also reduce pollution from power plants supplying electricity into Maryland.
EmPOWER Maryland

- Each utility is responsible for procuring or providing programs in its service territory designed to meet the EmPOWER program goals.

- Initially established a goal to reduce per capita electricity consumption and peak demand by Maryland consumers by **15 percent** by 2015 from 2007 baseline.

- PSC directed utilities to ramp up electricity savings to **2 percent** of each company’s gross retail sales baseline based on three-year cycles, through 2023.
  - General Assembly codified the energy savings goals and cost-effectiveness measurements in PSC Order No. 87082 in 2017.
  - Savings come from a variety of sources, including equipment-based measures, “smart meter” enabled analytics, and more efficient distribution grid hardware.

- The GGRA Draft Plan proposes that utility EmPOWER investments continue beyond 2023.
• On June 25, 2019, Governor Hogan issued an executive order establishing a new energy savings goal for State government. (EO 01.01.2019.08)

• DGS, in cooperation with MEA is to manage a “Maryland Leads by Example” energy savings initiative that will oversee reducing, by the year 2029, the energy use of State-owned buildings by 10% percent compared to a 2018 baseline.

• EO outlines five specific tasks
  – These tasks include an overall inventory, energy audits, energy reduction measurement, progress reports and multi-agency collaboration on designing and implementing additional cost-effective energy saving programs
Clean Cars and Zero Emission Vehicle (ZEV) Mandate

- The Maryland Clean Cars Act of 2007 required MDE to adopt regulations implementing California’s stricter vehicle emission standards.
  - First motor vehicle program to directly regulate CO$_2$ emissions.
  - Includes a Zero Emissions Vehicle (ZEV) mandate.

- California has since developed stricter tailpipe and GHG standards referred to as Cal LEV III.
  - Adopted by Maryland in 2012.
  - LEVIII Program will reduce GHG emissions from vehicles by 34 percent when fully implemented in 2025.
  - LEVIII Program also strengthens the ZEV mandate, increasing the requirements beginning in 2018.

- California working on even more stringent standards

- Will discuss Maryland challenges to federal rollbacks later in this presentation
The ZEV mandate is a critical technology forcing component of the Clean Car Program.

Maryland continues to be a national leader in supporting the LEVIII Program by:
- Deploying ZEVs;
- Supporting legislation and initiatives to remove barriers;
- Developing EV charging infrastructure; and
- Providing incentives in support of these vehicles.

The Clean Cars Acts of 2017 and 2019 are examples of Maryland’s commitment.

California is in the early stages of developing a regulatory update to the Clean Cars Program.
- Will strengthen the GHG standards beyond 2025.
- Maryland will continue to work with California and other states that have adopted the California Car Program.
Public Transit Expansion

• Maryland continues to devote record levels of funding for public transportation.
  – Public transportation emits roughly 40 to 50 percent less GHG emissions per passenger mile than an average single occupancy vehicle.

• Programs in this policy category include transit initiatives that support goals of:
  – Increasing public transit ridership.
  – Increasing intercity transportation initiatives that support Maryland Area Regional Commuter and regional and national passenger rail services such as Amtrak.

• By providing alternatives to vehicle transit, these initiatives have the potential to reduce vehicle miles traveled (VMT) and GHG emissions.

• Public transportation strategies are broadly classified into two strategy groups:
  – Transition to cleaner and efficient public transportation fleets, and
  – Expansion of public transportation or intercity passenger service (new or increased capacity, improved operations).
Transportation and Climate Initiative (TCI)

• TCI is a regional effort of Maryland and 11 other Northeast and mid-Atlantic states and Washington, D.C.

• TCI is designed to:
  – Reduce GHG emissions in the region’s transportation sector;
  – Minimize the transportation system’s reliance on high-carbon fuels;
  – Promote sustainable growth to address the challenges of VMT; and
  – Help build the clean energy economy across the region.

• TCI will also drive investment in clean transportation infrastructure, and encourage widespread use of EVs powered by increasingly clean electricity.

• TCI is looking to apply the proven “carbon cap-and-invest” model to transportation emissions. Framework for a draft regional policy proposal released on October 1, 2019

• Maryland specific stakeholder meetings are being planned
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<tr>
<th>Funded Strategies</th>
<th>Approx. Reductions (MMT CO2e)</th>
<th>VMT Reduction</th>
<th>Fuel reduction (g gasoline)</th>
<th>Fuel reduction (g diesel)</th>
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<td>2018 MPO Plans &amp; Programs yield lower annual VMT growth (1.4%/yr)</td>
<td>1.06</td>
<td>3,158,758,638</td>
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<td>On-Road Technology (CHART, Traveler Information)</td>
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<td>Freeway Management/Integrated Corridor Management (I-270 example, SHA I-95/MD 295 pilot)</td>
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<td>Arterial System Operations and Management (expanded signal coordination, extend CHART coverage)</td>
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<td>Innovative Strategies</td>
<td>2030 Impacts</td>
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<td><strong>Strategy</strong></td>
<td><strong>Approx. Reductions (MMT CO2e)</strong></td>
<td><strong>VMT Reduction</strong></td>
<td><strong>Fuel reduction (g gasoline)</strong></td>
<td><strong>Fuel reduction (g diesel)</strong></td>
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<td>Freight Villages/Urban Freight Consolidation Centers</td>
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Maryland forests on both public and private lands are managed to capture carbon through sustainable forest management practices.

Enrolling unmanaged forests into management regimes will:
- Increase rates of carbon sequestration in forest biomass;
- Increase amounts of carbon stored in harvested, durable wood products; and
- Result in economic benefits and increased availability of renewable biomass for energy production.

Goals are to:
- Improve sustainable forest management on approximately 30,000 acres of private land annually;
- Ensure third-party certified sustainable forest management on approximately 200,000 acres of State Forests;
- Support forest markets that keep land in forest use; and
- Provide sustainable management for multiple benefits on other DNR lands when possible.
Enhanced Healthy Soils Incentives

• Agronomic and conservation practices used by Maryland’s farmers have the potential to:
  – Sequester carbon and other GHG emissions.
  – Reduce nutrient and sediment flows into the Chesapeake Bay and its tributaries.

• The 2017 Healthy Soils Act charged MDA to develop a healthy soils program to improve the health, yield, and profitability of Maryland's soils.
  – Also promote the further adoption of conservation practices that foster soil health while increasing sequestration capacity.

• MDA collaborated with stakeholders from the Healthy Soils Consortium to identify practices that are most effective in improving soil health and building soil carbon stocks.

• Just last week, the Soil Health Advisory Committee was announced.

• This group will help to determine the metrics and tools used to:
  – Quantify soil carbon;
  – Provide incentives to encourage the additional implementation of climate-friendly soil practices; and
  – Find ways to capitalize on co-benefits for both water quality and carbon sequestration.
The Clean Air Act requires use of alternatives to stratospheric ozone-depleting substances. HFCs are among most common alternatives.

HFCs are extremely potent GHG emissions.
- 1 pound of certain HFCs is potentially as potent as 1,400 pounds of CO₂.

After efforts have stalled at the federal level, states have begun their own phase out initiatives.
- MDE will develop regulations similar to those being developed by other U.S. Climate Alliance states ... California, Delaware, New York, Massachusetts, Connecticut, and other states.
- Would phase out the use of certain HFCs in multiple end uses.
- Supported by private sector and environmental advocates

Maryland regulations going to Air Quality Advisory Council on December 16th
Methane Regulations

- MDE is working on programs to reduce methane leakage from natural gas compressor stations and related infrastructure, landfills, waste water treatment plants and the natural gas distribution system.
  - Transmission and Storage sector regulations expected to be presented to the Maryland Air Quality Advisory Council on December 16th.

- Coordinating with U.S. Climate Alliance states.

- Also working with University of Maryland researchers to use recent research to enhance inventories.

- MDE initial analysis of “upstream” methane emissions associated with natural gas use in Maryland posted on the MDE/Climate Commission web site.
• The Draft Plan includes numerous “non-traditional” emission reduction programs. Some through partnerships, some through voluntary and outreach efforts. Examples include:
  – The Climate Champions initiative
  – The Climate Ambassadors effort
  – The U.S. Climate Alliance partnership
  – Partnerships with local government
  – Idle Free MD
  – The Port Partnership
  – The VW Mitigation Plan
  – More

• Many will help reduce emissions
  – None used as reduction in the Draft Plan for now.
## Core Programs

<table>
<thead>
<tr>
<th>PROGRAM I.D.</th>
<th>PROGRAM NAME</th>
<th>LEAD AGENCY</th>
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<tr>
<td>4.3.1</td>
<td>EmPOWER Maryland</td>
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<tr>
<td>4.3.1.1</td>
<td>EmPOWER Maryland: Utility Responsibility</td>
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<td>EmPOWER Maryland: Combined Heat and Power</td>
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<td>GHG New Source Performance Standard</td>
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