



Canada's fragmented energy transition and the role of provinces

Join us **11am PT/2pm ET on July 9**
as some of Canada's leading climate think tanks offer informed insight on provincial climate action

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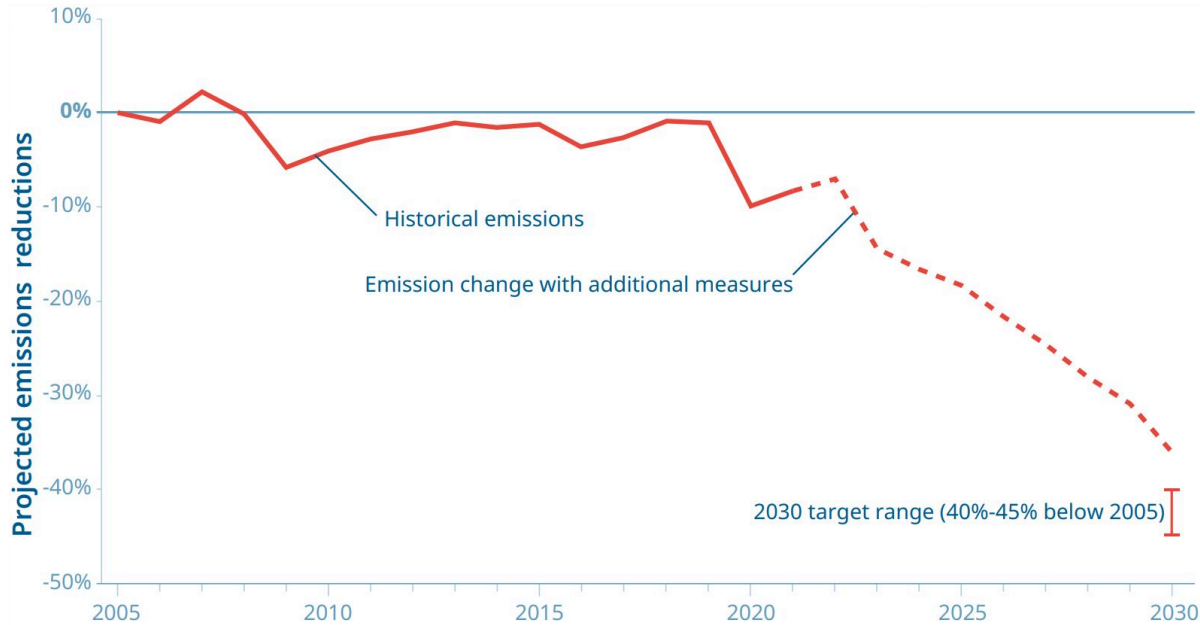
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All Together Now

A provincial scorecard on shared responsibility to reduce greenhouse gas emissions in Canada

Sarah McBain, Thomas Gunton, Chelsea Mathieson, Martha Kilian,
Matt Dreis, Simon Dyer

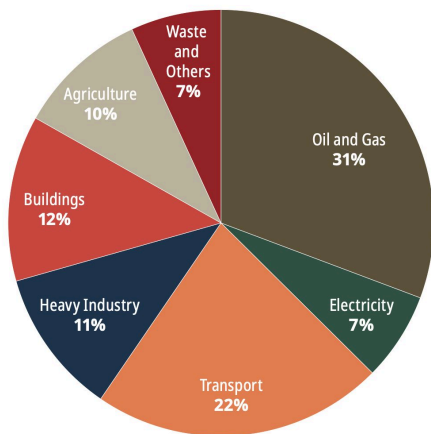
Canada's emissions: a snapshot



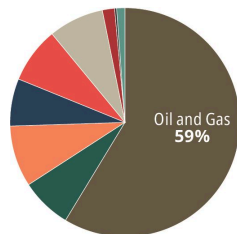
Data source: 2024 National Inventory Report: Canada's Greenhouse Gas and Air Pollutant Emissions Projections

Canada's emissions: a snapshot

Canada's emissions by economic sector

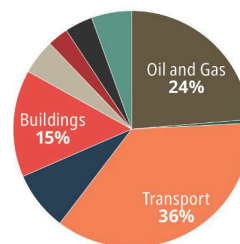


Alberta's emissions by economic sector



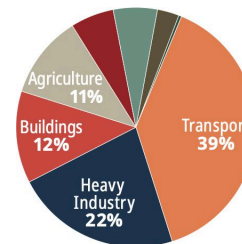
- Electricity 7%
- Transport 9%
- Heavy Industry 7%
- Buildings 8%
- Agriculture 8%
- Waste 2%
- Coal Production 0%
- Light Manufacturing, Construction and Forest Resources 1%

British Columbia's emissions by economic sector



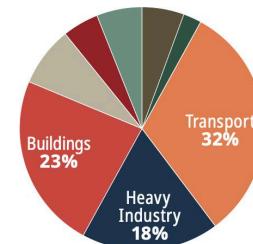
- Electricity 0%
- Transport 9%
- Heavy Industry 8%
- Agriculture 5%
- Waste 3%
- Coal Production 4%
- Light Manufacturing, Construction and Forest Resources 5%

Quebec's emissions by economic sector



- Oil and Gas 3%
- Electricity 0%
- Waste 6%
- Coal Production 0%
- Light Manufacturing, Construction and Forest Resources 6%

Ontario's emissions by economic sector



- Oil and Gas 6%
- Electricity 2%
- Agriculture 8%
- Waste 5%
- Coal Production 0%
- Light Manufacturing, Construction and Forest Resources 6%

Assessing climate leadership

- Evaluate the performance of Canada's provincial and federal governments.
- Across 23 policy indicators representing best practice for effective climate policy.

General

- Emission reduction targets
- Climate action plan
- Climate accountability
- Clean economy transition

Sector-specific

- Buildings
- Transportation
- Electricity
- Oil and gas



Assessing climate leadership

	CAN federal	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Emissions reduction targets											
Has a 2030 target aligned with a 40–45% reduction (below 2005 levels)	●	●	●	●	●	●	●	●	●	●	●
Has or is in the process of legislating a net-zero by 2050 target	●	●	●	●	●	●	●	●	●	●	●
Has interim emissions reduction targets	●	●	●	●	●	●	●	●	●	●	●
Climate action plan											
Has a climate plan	●	●	●	●	●	●	●	●	●	●	●
Has a plan to meet net-zero by 2050	●	●	●	●	●	●	●	●	●	●	●
Climate accountability and governance											
Has a legislative requirement to prepare a climate plan, set reduction targets, and monitor and report	●	●	●	●	●	●	●	●	●	●	●
Has an independent accountability process to advise and evaluate the climate plan	●	●	●	●	●	●	●	●	●	●	●
Has a public monitoring and reporting program for the climate plan	●	●	●	●	●	●	●	●	●	●	●
Climate adaptation											
Has a climate adaptation strategy	●	●	●	●	●	●	●	●	●	●	●
Reconciliation											
Has legislated UNDRIP	●	●	●	●	●	●	●	●	●	●	●
Equity											
Has a plan to assess and mitigate climate equity impacts	●	●	●	●	●	●	●	●	●	●	●

LEGEND

- Strong leadership
- Some leadership
- Little or no policy in place
- Not applicable

Assessing climate leadership

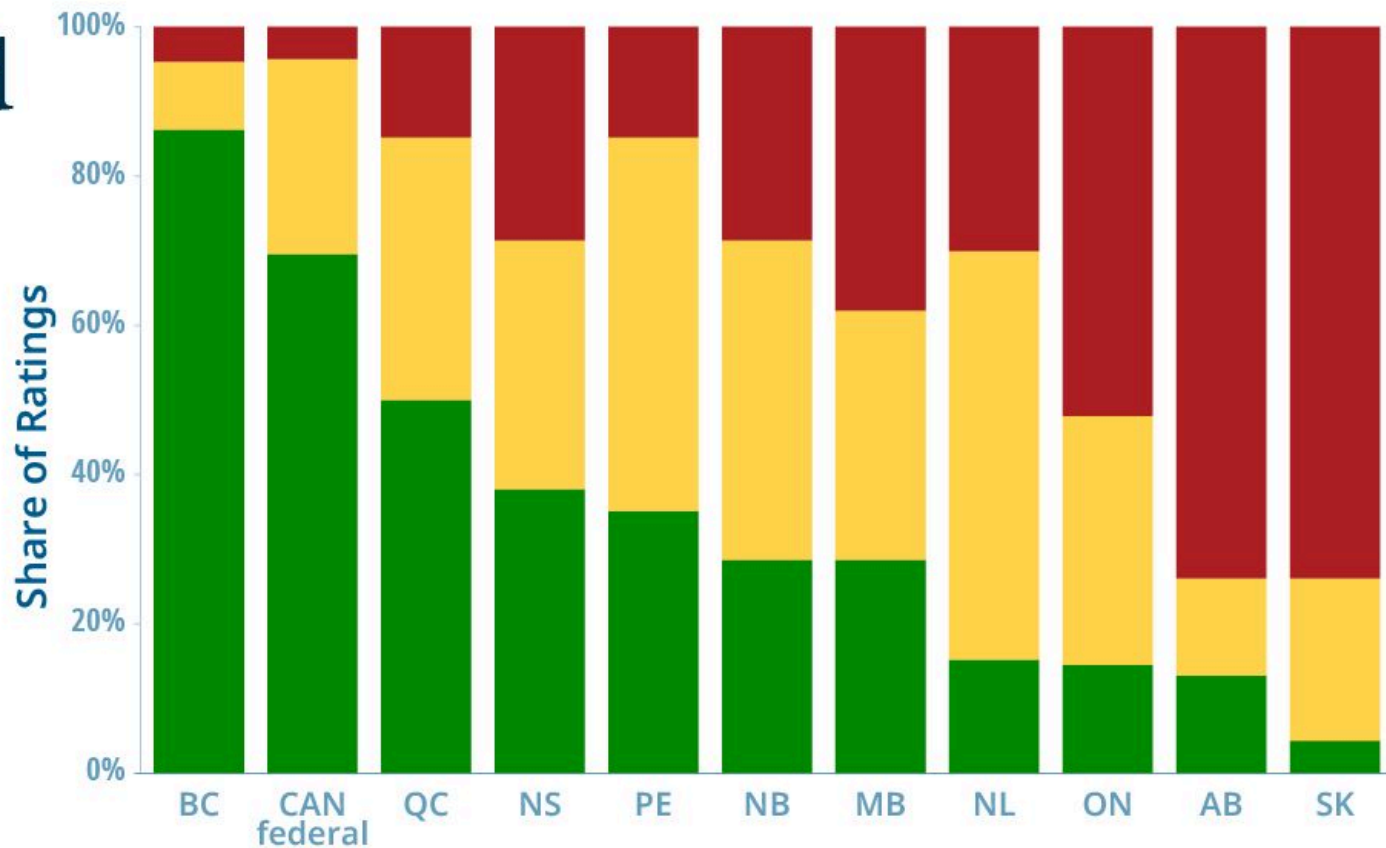
	CAN federal	BC	AB	SK	MB	ON	QC	NB	NS	PE	NL
Clean economy transition											
Has a comprehensive plan and policy to support the transition to a clean economy	Some leadership	Strong leadership	Some leadership	Little or no policy in place	Some leadership	Some leadership	Some leadership	Some leadership	Some leadership	Some leadership	Some leadership
Carbon price											
Supports carbon pricing in principal and has an end-use carbon price that meets federal benchmark	Some leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Some leadership	Little or no policy in place	Strong leadership	Little or no policy in place	Little or no policy in place	Some leadership	Some leadership
Has a carbon price on industrial emitters that meets federal benchmark	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership	Strong leadership
Buildings											
Has adopted standards for all new buildings to be zero-carbon ready by 2030	Strong leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Little or no policy in place	Little or no policy in place	Little or no policy in place	Strong leadership	Little or no policy in place	Strong leadership	Little or no policy in place
Has a plan to retrofit existing buildings to be zero-carbon ready, with supporting measures	Some leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Some leadership	Little or no policy in place	Some leadership	Some leadership	Some leadership	Some leadership	Some leadership
Transportation											
Has a sales regulation for zero-emission light-duty vehicles, and supporting incentives	Strong leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Some leadership	Little or no policy in place	Strong leadership	Some leadership	Some leadership	Some leadership	Some leadership
Has a sales regulation for zero-emission medium/heavy-duty vehicles, and supporting measures	Some leadership	Some leadership	Little or no policy in place	Little or no policy in place	Little or no policy in place	Little or no policy in place	Some leadership	Some leadership	Some leadership	Some leadership	Little or no policy in place
Has comprehensive public transit and active transportation policy	Some leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Little or no policy in place	Some leadership	Strong leadership	Little or no policy in place	Some leadership	Some leadership	Some leadership
Electricity											
Has decarbonized or has a plan for net-zero electricity generation by 2035	Some leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Strong leadership	Little or no policy in place	Strong leadership	Some leadership	Little or no policy in place	Strong leadership	Strong leadership
Has a plan to phase out coal by 2030	Strong leadership	Not applicable	Strong leadership	Little or no policy in place	Strong leadership	Strong leadership	Not applicable	Strong leadership	Strong leadership	Not applicable	Not applicable
Oil and gas											
Has legislated methane emissions reduction targets	Strong leadership	Strong leadership	Some leadership	Some leadership	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable
Has legislated oil and gas emissions reduction targets	Strong leadership	Strong leadership	Little or no policy in place	Little or no policy in place	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable	Not applicable

LEGEND

-  Strong leadership
-  Some leadership
-  Little or no policy in place
-  Not applicable

Energy and climate policies in Canada: ranked

- Strong leadership
- Some leadership
- Little or no policy in place



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Link to full report: pembina.org/all-together-now

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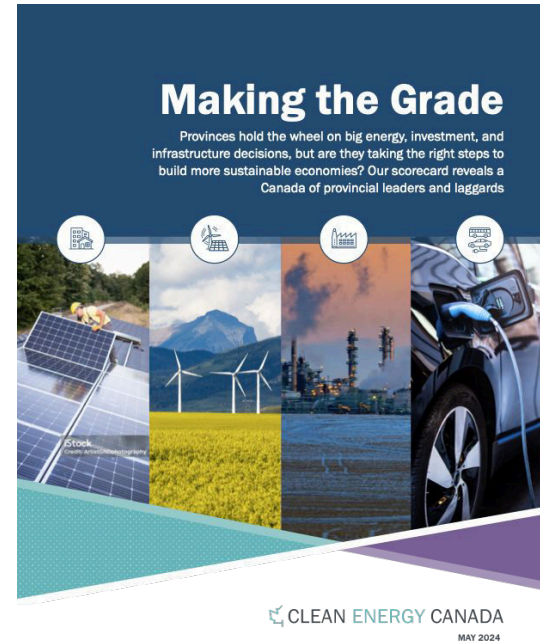
Making the Grade

Provincial scorecard reveals a Canada of provincial leaders and laggards in building sustainable economies



Why we did this report

- All eyes on federal climate policy and provincial rights- but little focus on provincial action
- **Provinces make up 80% of public spending**, most devolved in OECD, roll on climate and economic policy is critical.
- So we assessed which provinces are stepping up to the plate and which are lagging behind



Graded provinces on building a sustainable economy

Sustainable economy: attracting and supporting clean businesses and supply chains, helping **households transition off fossil fuels**



Clean Buildings

- Heat pump rebates
- Energy efficiency/ retrofit programs
- Building codes
- Home energy labelling
- Low-carbon construction



Clean Energy

- Prepare for clean demand
- Pathways Assessment
- Energy strategy
- Grid flexibility



Clean Industry

- Clean industrial strategy
- Establish targets
- Workforce strategy
- Support clean skills and training
- Support cleantech / decarbonization



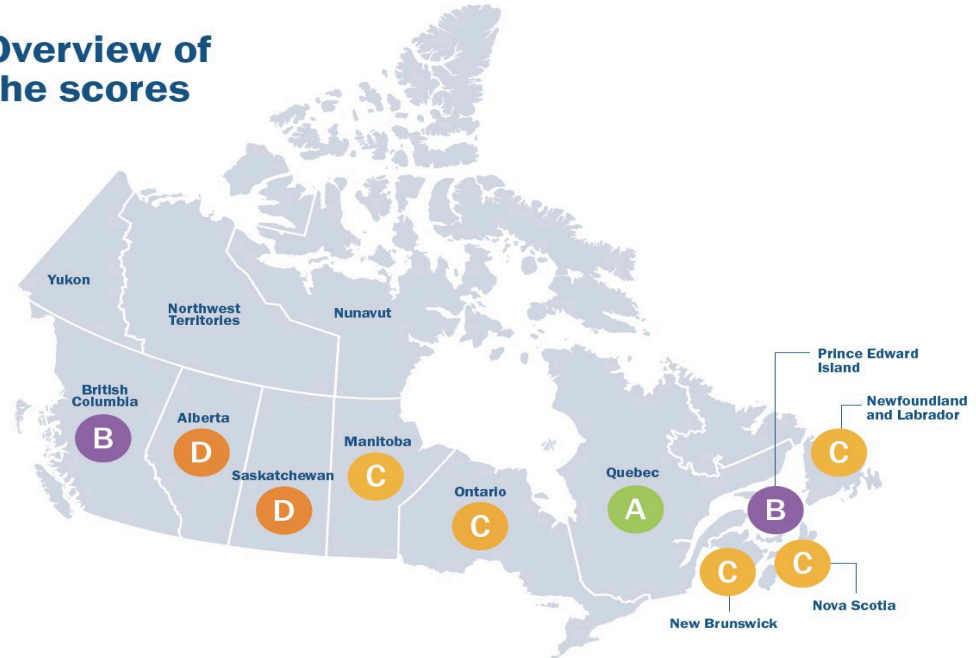
Clean Transport

- EV rebates
- Charging infrastructure
- ensure EV supply
- Home charging
- Public transport
- Zero-emission trucks/buses

Overall provincial scores

LEGEND	
	Global Leader
	National Leader
	Leadership Potential
	Middle of the Pack
	Falling Behind

Overview of the scores



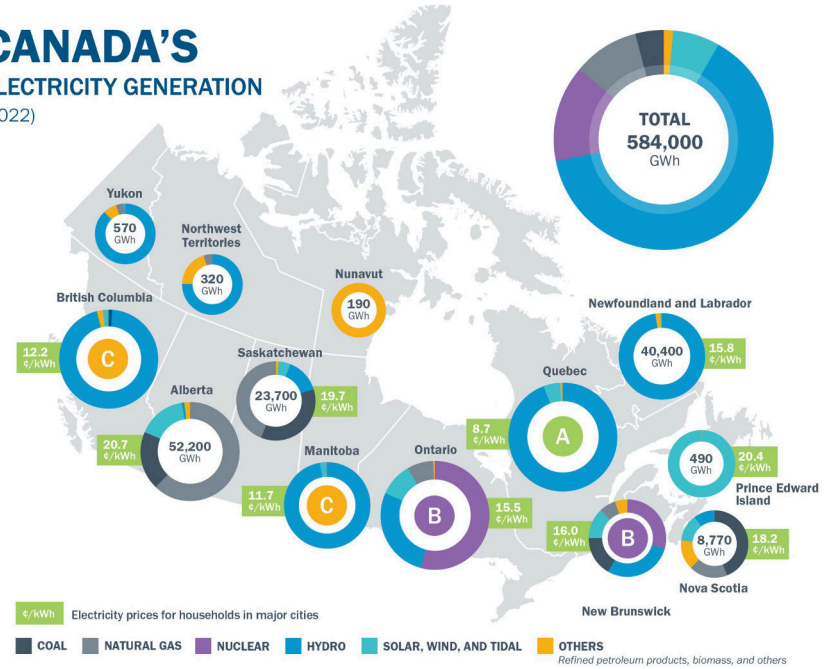
Provincial scores by pillar

	CLEAN BUILDINGS	CLEAN ENERGY	CLEAN INDUSTRY	CLEAN TRANSPORTATION
British Columbia	A	C	B	A
Alberta	D	D	C	D
Saskatchewan	D	D	D	D
Manitoba	C	C	B	C
Ontario	C	B	B	C
Quebec	B	A	A	A
New Brunswick	B	B	C	C
Nova Scotia	C	B	C	C
Prince Edward Island	B	B	B	C
Newfoundland and Labrador	C	C	C	D

Clean Energy: provincial snapshot

- **Grades not about historic emissions intensity:** BC, Manitoba and QC with similar grid intensities fared differently
- Reward efforts **to build a grid that will support the energy transition:** energy strategies, pathways to decarbonization, grid modernization and prepare for clean demand
- With electricity demand poised to at least double by 2050, **there is a need for greater ambition from almost every province**
- **Leadership hasn't always been partisan**

CANADA'S ELECTRICITY GENERATION (2022)



Clean Energy: energy strategies by province

Canadian Provinces and Net-zero Energy Strategies

	B.C.	Alb.	Sask.	Man.	Ont.	Que.	N.S.	N.B.	P.E.I.	N.L.
Comprehensive net-zero energy strategy	No*	No	No	Partial	Partial	Yes	Partial	Yes	Yes**	Yes
Explicitly centre achievement of net-zero 2050	No	No	No	No	No	Yes	No	Yes	TBD	Yes
Vision, objectives, action plans	No	No	No	Partial	Partial	Yes	Partial	Yes	TBD	Yes
Ongoing renewal process	No	No	No	No	No	Yes	No	Yes	TBD	Yes
Comprehensive stakeholder engagement	No	No	No	Partial	Yes	Yes	No	Yes	TBD	Yes
Use of concrete targets	No	No	No	No	No	Yes	Yes	Yes	TBD	Yes
Integrates planning across energy systems	No	No	No	Partial	Partial	Yes	No	Yes	TBD	Partial

Overall insights

- **Provinces are not doing enough** to help businesses and households to benefit from the energy transition —whether it's investing in the clean electricity grid, building out a public charging network, or setting their industries up for success in a clean energy future. **Average grade is a C.**
- From coast to coast to coast, **Canadians are living vastly different experiences of the energy transition.** This unequal transition will increasingly see households and industries in certain provinces losing out on economic opportunities while paying more for energy.

Overall insights

- Provincial **clean transportation efforts are farthest behind**. This has big implications for how households experience the affordability benefits of clean energy, as an EV is one of the most significant ways households save money.
- Some of the **harshest critics of federal** action **are doing the least** to help their own citizens and businesses.