CLEAN CITIES RESEARCH

Phase 2 Findings Summary Report (B.C.)

Understanding industry perspectives on carbon pollution regulations for new construction in British Columbia

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A project of MakeWay

BRIGHT FUTURE STUDIO

EcoAnalytics

Contents

Executive Summary

This report summarizes findings from 20 structured, anonymous interviews conducted between October 2025 and March 2026 with members of British Columbia's building and development industry. The interviews sought to understand industry perspectives on carbon pollution regulations for new construction among those in the middle of the opinion spectrum, neither strong supporters nor strong opponents.

We specifically asked participants to share:

- Their views on the extent to which they feel it is *appropriate* for governments to set rules about how much carbon pollution buildings can produce,
- Their thoughts on how *achievable* they find the province's goal that all new buildings will be zero carbon in their operations by 2030, and
- How prepared they consider their industry to be to meet higher carbon standards.

The interviews were evenly split between Part 3 developers and Part 9 homebuilders and centred on the Zero Carbon Step Code as the province's policy mechanism. Across both cohorts, the dominant mood was one of conditional support: most participants accepted the rationale for reducing emissions from new buildings, but questioned whether current policy timelines, market conditions, and delivery systems are aligned with that ambition.

Participants in both groups described a gap between policy ambition and on-the-ground readiness. They pointed not only to added costs, but to a wider ecosystem they see as unprepared for a 2030 zero-carbon mandate. Reasons cited included concerns with electrical capacity, permitting delays, equipment availability, workforce training, and uneven institutional readiness. Many emphasized that the issue is not unwillingness alone, but whether projects can remain viable and financeable in a market that is strained by higher costs and weaker demand.OBJ

Part 3 developers were generally more technically fluent and more likely to support carbon regulation in principle than their Part 9 counterparts. But they felt governments do not fully appreciate development realities, lender constraints, and the risks of layering new requirements onto projects already in the pipeline. For their part, homebuilders expressed more mixed views and, in several cases, less familiarity with the Zero Carbon Step Code. Their responses suggest that for smaller builders, the challenge is not only cost and capacity, but also policy clarity, practical comprehension, and confidence in how the transition is being communicated and implemented.

Overall, the findings suggest that industry pushback on carbon requirements should not be understood simply as opposition to climate action. Instead, participants contested the pace, policy design, and practical delivery of the transition. Their comments point to a clear implication for policymakers: stronger carbon requirements may attract broader support if paired with clearer sequencing, better

technical communication, and more visible efforts to reduce implementation risk and protect project viability.

The research also suggests that advocates for stronger carbon requirements will be most effective when they pair ambition with a clear understanding of the delivery constraints facing builders and developers, and when they position regulation less as a moral test and more as a practical transition that must work on the ground. It also points to the value of targeting broader market barriers—related to financing, insurance, valuation, and implementation challenges, etc.—and grounding advocacy in credible case studies, cost evidence, and lessons from completed projects. Above all, practical proof delivered through trusted technical experts and industry peers is likely to resonate more than abstract public-facing pressure or moral appeals to the greater good.

About this research

The Clean Cities Research (CCR) Project, led by EcoAnalytics Research, is using targeted studies and evidence-based guidance to help cities in British Columbia and Ontario—among others—advance policies that address climate change, improve the lives of thousands, and clear barriers for businesses to accelerate the transition to a clean economy.

As part of this work, the CCR Project aims to understand industry perspectives on the Province of British Columbia's Zero Carbon Step Code (ZCSC), and the equivalent requirements of the *Vancouver Building By-law*. Authorities having jurisdiction over the *British Columbia Building Code* may use the ZCSC to limit the quantity of greenhouse gas emissions that new buildings may produce. The Province of British Columbia has also set a target that all new buildings must be zero carbon in their operations by 2030.

In June 2025, EcoAnalytics retained Bright Future Studio to lead this phase of the research. In close collaboration with EcoAnalytics and its advisors, the company designed a structured and anonymous interview process, recruited 20 participants, conducted the interviews, compiled outcomes, and analyzed the findings. Bright Future Studio intentionally screened out individuals who strongly support and/or vocally advocate for strong building climate performance and associated voluntary standards, such as the Passive House certification. It also aimed to exclude those at the far opposite end of the spectrum—those opposed to building decarbonization and other measures addressing climate change.

Since property developers and homebuilders each face distinct challenges and opportunities, Bright Future Studio divided the research, and this report, into two sections. For the methodology, please see Appendix A.

Note: A second study, with a separate interview process, will assess industry concerns and priorities on potential carbon regulations that would impact the owners and managers of existing large buildings in Ontario's Greater Toronto and Hamilton Area, the second part of Phase 2 of the CCR Project.

1. Part 3 Developers

This section of this report summarizes insights from ten interviews with individuals who oversee the development of **larger and more complex buildings**—including mid- to high-rise residential, mixed-use, and commercial projects. Under the *British Columbia Building Code*, such developments are referred to as Part 3 projects.

Interviewees either directly lead or influence Part 3 projects from land acquisition and rezoning, through design, permitting, and construction. Several operate vertically integrated development and construction platforms that also manage asset portfolios.

Participants are deeply embedded in the financial, technical, and regulatory realities of large-scale urban development. Their perspectives reflect both strategic positioning and day-to-day operational experience. They manage risk profiles and balance investor expectations and market demand with regulatory requirements.

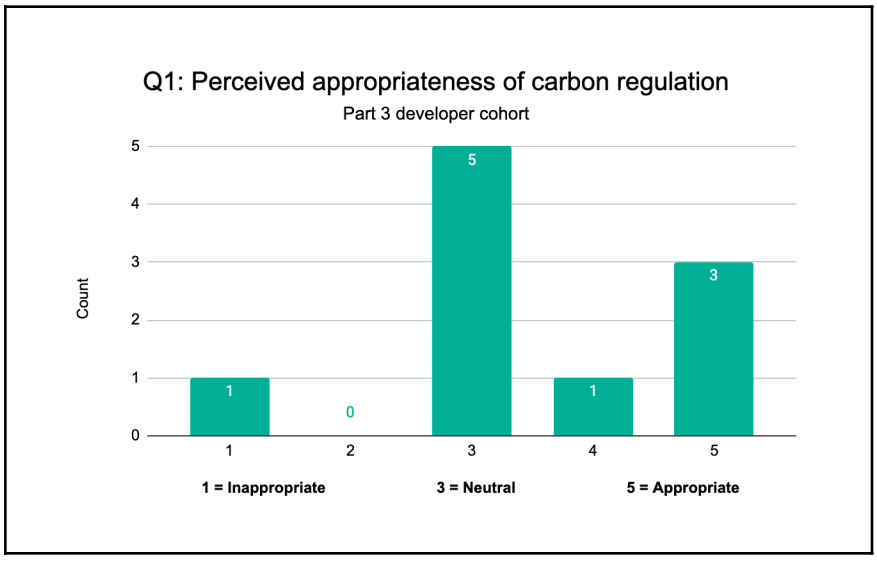
1.1 Legitimacy of carbon regulation, benefit versus burden

We began by exploring the degree to which participants perceive regulations that would seek to limit operational carbon from new buildings as **appropriate**.

We characterize the overarching sentiment as "conditional support." Most participants accepted, in principle, the underlying rationale for carbon regulation of their sector and viewed requirements through a lens of reduced climate risk and improved long-term resilience. They evaluated regulatory legitimacy through perceived sectoral equity, impact, and timing.

Scoring

We asked interviewees to score the appropriateness of new construction carbon requirements on a five-point Likert scale, with a score of one indicating "completely inappropriate" and five denoting "completely appropriate."



Regulation-supporting participants characterized

their support both as concern for our shared future and as a long-term risk management problem. They primarily understand decarbonization as a response to reducing potential future liability exposure in their projects, and some also own the projects they develop and so have an appreciation of, for example, reduced exposure to fuel price volatility.

Themes

Current market conditions are throttling support for action. Multiple Part 3 participants accepted that their sector has a responsibility to address carbon pollution and expressed at least some degree of support for policy. But they tempered that support with the harsh economic realities of the moment. (Said one, "the industry is on its knees.") Given this context, and that market transformation is very much still a work in progress, they said that Zero Carbon Step Code requirements could delay projects or force redesigns that decrease the affordability of new buildings.

A theme of **burden-sharing** and **proportionality** surfaced in the interviews. Participants pushed back on the province's emphasis on regulating carbon from new construction, when existing buildings produce the vast majority of built-environment emissions. A few interviewees suggested that, because existing building upgrades are so difficult and capital-intensive, the government's focus on new construction likely represents the path of least political resistance. Some suggested other sectors may deliver larger or faster carbon reductions, and governments should take care to ensure proportionality wherever they apply regulatory pressure.

Caught in the middle? Again, most participants supported the idea of carbon regulation as the right thing to do, and acknowledged their sector's contribution to the climate challenge. ("We're quite literally burning the planet down around us," acknowledged one.) But they also expressed that most people, notably, their customers and buyers, are unable to look beyond their immediate surroundings and needs. While they recognize the mechanisms of market transformation, this short-termism remains endemic to the larger economic system, structures, and context they must operate within, which makes meaningful incentives critical.

Quotes

"I understand what our climate is going through. But, at the same time, as a developer and a person who's grown up in this hyper-expensive housing environment, I don't think just layering everything onto housing necessarily makes sense, even if we do have carbon emissions we need to cut."
—Participant 109

"A lot of the policies around greater environmental performance do translate into greater cost, which at a time of cost-sensitivity is challenging for the construction industry. Construction is a 'very slow to move' or 'slow to change' industry, and I think …[it] doesn't deal with innovation as well as many other sectors."
—Participant 101

"I have no issue with targets. The asterisk I'll add, though, is [that] they do need to be considered in conjunction with the other facets of projects that government set rules and guidelines for as well, such as the seismic code and the accessibility code… Each individual silo has a very laudable objective. But when you layer the three or four levels of different requirements over top of each other, you wind up with a project that becomes very difficult or expensive to execute… The more layers we put in, the more it becomes challenging to deliver projects at a time when [we] are facing very razor-thin economics."
—Participant 102

"We've seen in jurisdictions where there's been strong [climate] policy that there's been a lot of movement [on] decarbonization. In the absence of that, we just see kind of piecemeal leadership [from] social-purpose companies or those that see the business value in it. But we're not going to see that widespread market transformation that we need without strong policy."
—Participant 103

"The industry gets really caught up in [carbon requirements] being 'one more thing' that they have to pay attention to. … There's so many benefits to the results of these types of regulations, but the industry response is quite tainted by the current market landscape and all the other burdens that are upon [developers]."
—Participant 103

"The City of Vancouver has done a great job [on carbon regulations]. I just wish the province had put in a [greenhouse gas intensity] metric when it should have done… because now that we've got this Energy Step Code and a Zero Carbon Step Code, it's a patchwork. You're trying to mash these things together. The inefficiency is a bit crushing."
—Participant 104

"If you have the proper incentives in place, the market is going to correct itself. I've had conversations with BC Hydro before. From time to time, they will come and say, 'We see you guys are still doing gas-fired equipment in buildings. Can we understand why you're not doing more electrification?' And I will say, 'It's really simple; you guys don't offer us any rebates.'"
—Participant 108

1.2 Regulatory ambition and pace of change

We then tested the perceived **achievability** of the Province of British Columbia's target under CleanBC that all new buildings must achieve zero operational carbon by 2030. We also asked participants to describe the conditions that would need to be in place to achieve the province's goal.

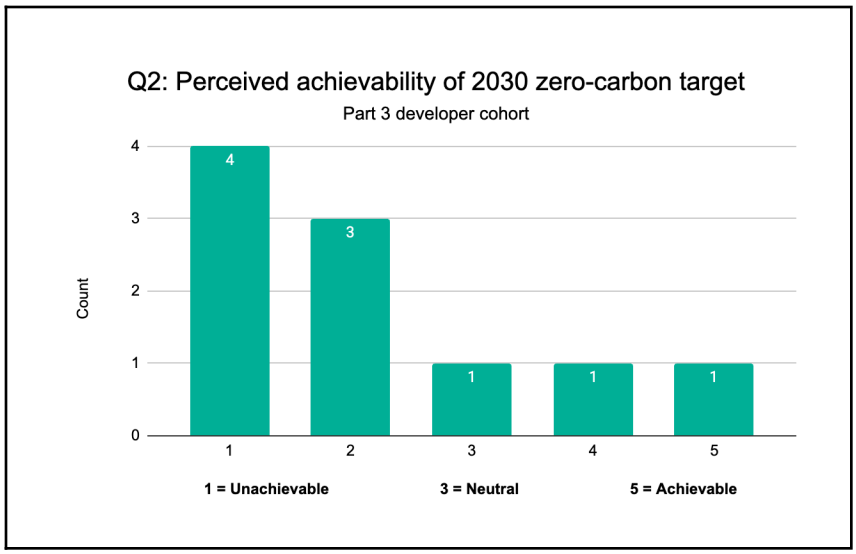
Participants conveyed strong overall skepticism, with a minority considering the target achievable. Few questioned the technical feasibility of low- or zero-carbon buildings. Their leeriness instead reflected

concern with the necessary associated enabling systems. Cited considerations included grid capacity, equipment availability, utility connection timelines, municipal processing capacity, cost and financing conditions, and—a consistent theme—market appetite.

Scoring

We asked participants to score the perceived achievability of the province's overarching goal that all new buildings must achieve zero carbon in their operations by 2030.

The results, shown here, suggest a strong skepticism about the province's decarbonization ambition—even among those who accept the importance of emissions reductions.



Themes

Participants consistently cited **available grid capacity** and **service connection timelines** as lead constraints to meeting the province's target. One who scored the target as "completely unachievable" said that they did not have confidence in BC Hydro's distribution grid expansion plan and promised connection timeline improvements. One stressed that the uneven geographic distribution of available electrical capacity can undermine project viability; some neighbourhoods they wish to develop in may have ample electrical capacity, they said, while other areas have "zero."

Perceptions of achievability varied, in part, by concern with **impacts of stacking separate requirements for carbon and energy performance**. One interviewee felt that they could meet operational carbon limits through electrification, but in the next breath cautioned that stringent envelope requirements (of the Energy Step Code) could threaten project viability by "driv[ing] things through the roof."

Others cited **uneven municipal staff sophistication and understanding** as an issue across jurisdictions. Even when developers felt they could technically deliver low or zero carbon buildings, they described friction and frustration in some interactions with local government staff, when they sensed a lower level of business literacy on the other side of the table. The implication: The regulatory path may be conceptually sound, but implementation is uneven at least in part due to capacity in local government staff, such as building officials, and a lack of understanding how regulations impact project costs and timelines on the ground.

Quotes

"You have parts of our province where there might be zero interest in [building decarbonization]. There might be such pressure on costs that it will get value-engineered out, or not even considered. Because we're such a big province with so many different communities, having one-size-fits-all goal seems challenging." —Participant 101

"Philosophically, I don't think we're moving fast enough. Practically, I think we're moving as fast as we can… It's hard to maintain that forward momentum when you have other larger contributors to the issue basically saying, 'Hey, we don't believe this anymore, so we're going to do our own thing.' So, we need to do our part. And if other people choose [to pull back] that's not a reason to abandon the appropriate course, either." —Participant 102

"The pace of change is about right. There are definitely jurisdictions that are moving faster and [others] that are moving a lot slower. And I do think that the foresight and predictability [are] a huge benefit to industry. It is the uncertainty of regulation that really gets us all caught up in a knot. So, I do think that it's the right pace, and the predictability is key." —Participant 103

"The reason I'd say the industry is so displeased right now with the environmental regs is because [it is] hurting. Objectively, the sector is currently on its knees. It has never seen anything like this for 25 or 30 years. And so, of course it's going to go swinging at everything it can find. And environmental regs is the easy one." —Participant 104

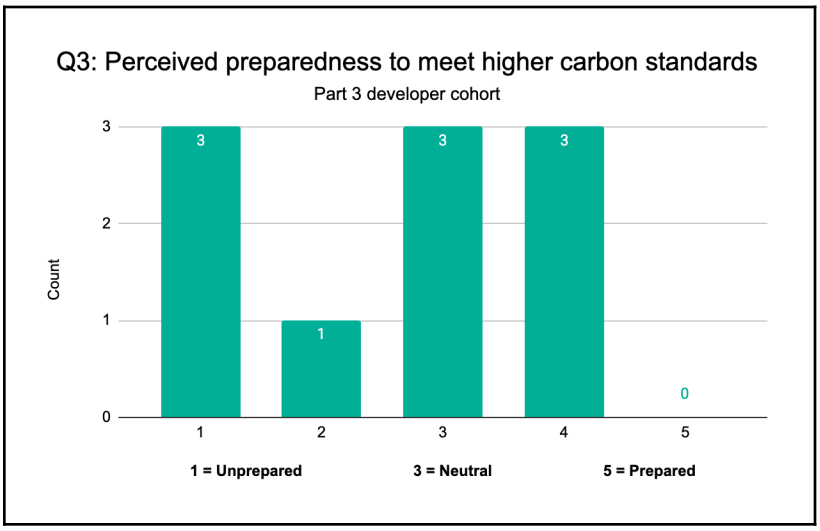
"When push comes to shove, the 'nice to haves' aren't 'need to haves.' I generally feel [zero carbon] is a really nice to have on these new builds, and I agree with the desire to get there. But I don't think it's economically feasible." —Participant 109

1.3 Market readiness and impacts

In this section, we asked participants to weigh in on industry **preparedness** to meet the province's 2030 target.

Scoring

We asked participants to score their perception of how prepared their industry is to deliver low or zero-carbon buildings.



Participants generally saw the sector as only moderately prepared to meet the province's 2030 target. Many said low-carbon delivery is feasible in principle, but not yet easy or scalable across all projects and markets. Their concerns centred on technology constraints, added costs, uncertain future requirements, and weak willingness to pay among buyers.

Themes

Two interviewees noted that in the province's larger population centres, their **industry is already meeting the requirements** of the lower tiers of the Zero Carbon Step Code. But they said that the sector will be hard-pressed to reach the top tier and is likely to face pushback and institutional inertia in some areas—particularly citing the availability, cost, and performance of equipment needed to deliver zero-carbon hot water in new homes.

Several interviewees said they were prepared to develop low-carbon buildings if pushed, but voiced anxiety about potential **future embodied-carbon requirements**—an undercurrent that appeared to shape their views of current policy. Participants described prospective embodied-carbon regulation—signalled by, separately, the City of Vancouver and the national model-code roadmap[1] [2]—as complex, uncertain, and costly. This anticipatory concern may be hardening resistance to expanding operational carbon-emission reduction requirements today.

Participants were careful to distinguish between **profit seeking** and **project viability**. Several underscored that any resistance to increased carbon performance requirements in their sector was not a desire to protect margins, but a practical constraint. Projects *must* meet lender expectations to advance, they stressed. When compliance cost pressures, among other costs, shift expected returns below lender viability thresholds, projects tend to be put on hold, interviewees said.

[1] Canadian Board for Harmonized Construction Codes. (2022, November). "CBHCC policy positions on developing and implementing greenhouse gas emissions provisions in the National Model Codes."

[2] Since 2023, the City of Vancouver has required Part 3 developers to report on the embodied carbon of their projects, and had originally planned to require corresponding reductions starting in January 2025. The City subsequently paused those requirements and instead began offering a modest density bonus incentive to proposed homes that demonstrated reduced embodied carbon.

Participants said they could be ready to deliver zero-carbon across the board by 2030, "if we had to, or if we were forced to," as one said. But they stressed that such buildings still carry incremental capital cost premiums.[3] And buyers are simply **not ready to pay for zero-carbon performance**. Unlike net-zero -energy-ready projects, which carry the promise of lower utility bills, buyers do not perceive a direct benefit of carbon reduction, they said.

Quotes

"Five years ago, I think people were excited about [zero carbon buildings]. Everyone feels good about doing things when their job can cross over with helping a societal issue… But today, when there's new policy that's adding costs, I think a lot of us feel 'structurally impaired.' A lot of us are just in pure 'how can we stop the bleeding' mode right now. And I think any new policy, despite its very good intentions, feels today as 'Now's not the time. We're hurting. People are getting laid off. People are going into receivership. And you're making the projects more expensive when the market is willing to pay less than [it was] two or three years ago.'"
—Participant 109

"The more expensive you make [projects] in the next two to three years… I just think they're going to be less financeable. The banks won't finance [a zero-carbon building] if their profit level is below a certain amount. They don't see value in these kinds of initiatives. If a project that's 'green' won't pencil out, they just won't do it.
—Participant 107

"The industry is very flexible. People are used to change in the real estate and construction industry. I think the industry is able to accommodate [low carbon requirements] pretty well. The problem is, there's a cost to it, one that I don't think the market is willing to absorb. I don't see people going out and saying, 'You know what? I'll spend an extra 10% on my condo purchase, because it's all-electric.'"
—Participant 110

"The delay between where policy-maker thinking is at, and what is actually being built by the guy swinging a hammer, is huge. And the policy makers don't understand that. The inertia—there is a huge amount of it. And distrust of new technology. They just see risk because the new technology is more complicated than the old fossil technology. Construction people are pragmatic people. They're just not in these highfalutin conversations around the climate. They like to build stuff; that's where their satisfaction comes. So, we do need to get to the [construction] industry. Particularly with hot water.

[3] As of 2022, a developer would pay an estimated incremental capital-cost premium of $65 per square meter to meet the top tier of the Zero Carbon Step Code in a high-rise MURB in Climate Zone 4. (Source: Province of British Columbia. Ministry of Housing. Building and Safety Standards Branch. "Draft Building Carbon Pollution Standard for Part 3 buildings in British Columbia Technical and financial data tables." September 2022.)

Within the industry, the disdain for doing hot water in a low-carbon manner is huge."
—Participant 104.

1.4 Influences and information sources

In this section, we asked participants to reflect on what shapes their views on carbon requirements. We queried them on trusted information channels, who they listen to or watch, and the conditions under which they might reconsider their position on a regulation or other issue.

Interviewees were most influenced by their own direct project experience and trusted technical experts, including mechanical and electrical engineers and energy modelers. One described using their technical consultants to "ground truth" new information. They said that if they come across a news report or new piece of information on a low-carbon innovation or environmental policy for buildings, they would take it to their consultants and ask them to "pick it apart and tell us what's relevant, what's not right, and if we need to worry about it."

Participants rely heavily on peer channels such as industry association events and bulletins. The one participant who most strongly supported carbon regulation said they subscribe to a wide array of sources, such as [Intergovernmental Panel on Climate Change] updates and Bloomberg New Energy Finance reports. Few placed much stock in trade publications, newsletters, or podcasts.

Participants generally described themselves as open to changing their position when presented with convincing evidence on matters impacting the business case, grid capacity, and first-hand lessons learned from completed projects. One participant described relying on the Urban Development Institute's code work and in-house engineering expertise to shape their decisions about electrification and mechanical systems in their projects.

Note: We did not ask participants to provide scores in this section, nor in the next one.

Themes

Pragmatism outweighed passion when we asked interviewees to explain how they arrived at positions and beliefs on building decarbonization. One participant said they had somewhat shifted away from an "all-electric at all costs" stance after digging into business case and grid implications. They described softening their absolutist view to allow for gas equipment that can step in during periods of exceptionally high electricity demand and very low temperatures, paired with operational guardrails.

Participants consistently described their views as shaped by direct project experience and consultations with technical experts whom they had worked with for years, if not decades. The most cited influence groups were:

- Energy modellers and mechanical engineers

- Mechanical contractors and related skilled trades
- Industry associations

Several interviewees described their perspectives evolving over time, particularly after studying modeled outcomes versus actual outcomes on projects. This suggests that their views are not fixed, but contingent on iterative learning and evidence grounded in specific contexts. However, rapid policy change can also create fatigue and uncertainty.

Participants stressed that rhetoric, advocacy campaigns, and emotional appeals would not influence their views. They portrayed their perspectives as rooted in operational constraints, cost modeling, and infrastructure coordination rather than any political orientation or world view.

This suggests that technical engagement and project-level evidence are more likely to influence attitudes on carbon regulation than appeals to the greater good. Case studies of zero-carbon Part 3 projects could prove valuable, assuming the audience could be convinced that the information was credible.

Quotes

"I'm not just making dollars for the sake of making dollars; I also believe we have to accept that the financial and economic framework that we work within [is] not super-tolerant of the sort of the 'degrowth' agenda. So, it's about being pragmatic for me and that's what shapes my world view."
—Participant 105

"Our local construction association sends out pretty good updates. I get correspondence from [my local government]. I do peruse various news media outlets from time to time, but a lot of [my information comes from] industry conversations, colleagues at various engineering firms who are our partners who are leaders in their disciplines. I have a network of people that I go for lunch with frequently, and they catch me up on what's current in their discipline."
—Participant 102

"LinkedIn is my newsfeed; it's where I get my information. Obviously, that goes far beyond just the markets that my job requires me to be abreast of, but it's how I form my views of the climate conversation and decarbonization trends."
—Participant 104

"I like to talk to the policy-makers to see what they're thinking about, and understand it, because we're planning buildings two years from now, so I need to understand if [upcoming requirements] would apply to our site. If it does, then [I follow up with] everything from the news, to people in the industry. It's mostly people in the public sector and in the private sector, and trying to understand how they're wrangling with [a proposed policy] and what it means to them, and seeing if we can find some consensus on where there are pain points, and where it's simpler, or achievable."
—Participant 109

"I think as a company we're not sophisticated enough in our assessments. We listen to the contractors too much. I wouldn't say we're not pushing hard enough—but we are still swayed by opinions that I don't feel are as informed as I would like them to be. We could be doing a better job, and realizing better community outcomes, better carbon outcomes, better building outcomes, if we were more sophisticated. But trying to build that sophistication within a business that's done the same thing for decades, that is tough."
—Participant 104

1.5 Closing reflections

In this section, we invited participants to share general feedback for governments on any aspect of how they design, implement, and/or share information about carbon regulations for buildings. We encouraged them to speak candidly about their pain points and concerns.

Themes

In their responses, interviewees tended to converge on three practical "if you want this to work" conditions:

- **Coordination and sequencing**: Interviewees urged governments to better coordinate and pace requirements (e.g. for accessibility), infrastructure planning, utility delivery timelines, and housing affordability objectives. Otherwise, participants felt various requirements and expectations stacked up on top of one another, adding layers of added complexity.
- **Incentives alongside mandates**: Participants argued the system moves faster and with less conflict when incentives reduce the incremental cost and de-risk adoption—especially when those incentives directly counteract existing signals that favour gas. Every industry asks for and expects "carrots" when asked to shoulder the costs of new regulation, and this one is no exception.
- **Acknowledgement of cost and feasibility constraints**: While recognizing the power of market transformation, participants wanted policy-makers to plainly recognize that zero-carbon performance requirements will increase their construction costs. Though the province has modeled and acknowledges these incremental capital-cost premiums, interviewees suggested they are often buried or downplayed. With profit margins presently thin, developers said they need to pass those costs on to buyers, which is a challenging task because those buyers are not (yet) prioritizing low-carbon performance.

Quotes

"We need to be ambitious. The urgency in climate action is clear, but the clarity and predictability and reducing other burdens of the marketplace so that we can deliver on this is so essential."
—Participant 103

"[Regulators] don't understand the level of risk that a development takes. In round numbers, every unit on a building is a million bucks. So if you're driving down the street, and you see a 60-unit building, it's a $60 million-ish project. And the [profit] margin on it, the bank requires you to be at about 15%. And, so what you often hear from the policy makers is, 'Well, the policy's only going to increase cost by 5%' Well, you just destroyed a third of the profit. You removed a third of the developer's profit on a $60 million project."
—Participant 104

"The government rolls out these things—saying, 'Okay, industry thou shalt do it'—without necessarily understanding all the consequences. There are a variety of layers within finance and construction financing that could be deployed here. Can we not get preferential financing? And all the Canadian banks have dialed this back; they used to have ESG mandates. They used to have to demonstrate what they're doing, and what their customers are doing, to reduce emissions. That's all gone at the moment, but maybe that needs to come back."
—Participant 105

"People try to push [zero-carbon buildings] as this very marketable thing, that you'll be able to sell or rent for more [money]. That is just not true. There are things that we invest in, that people will pay more for, but things like your structure and your mechanical system, typically [they won't]. If they're getting air conditioning, they don't care how it's getting to them. [Zero-carbon systems] add cost without adding value. People are feeling squeezed, and I think it shows in their spending habits."
—Participant 109

"There's a mistrust that has developed in B.C. that, you know, the development industry is out to get everyone. There are definitely people out there that are looking to do anything they can just to maximize the return they get. But, by and large, [with] the people we deal with, the people we know, that's not true. They're in the industry to build stuff, and ideally make a bit of money doing it; that's what we're all here for. I think that mistrust has led into some discounting of the feedback [regulators] get. You know, when we go to them and say, whether it's your [industry association], or whoever, goes and says, 'Look, you know, decarbonization is going to cost this amount of money.' And then on the other side, there'll be an environmental group that says, 'No, no, we ran this study and it says it's [cost] neutral.' Before we make up our mind, we gotta figure out why the [cost figures from the] two people who are spending a lot of time on this are so different."
—Participant 110

2. Part 9 Builders

This section summarizes insights from ten interviews with individuals who oversee the development of **smaller and simpler buildings** with a focus on ground-oriented and low-rise housing. Under the *British Columbia Building Code*, such homes are referred to as Part 9 projects.

Interviewees represent the spectrum of the housing development sector, from laneway homes and multiplexes, to high-end custom homes, to design-build production ("spec") housing. Some oversee land assemblies and develop new subdivisions that cluster dozens or more detached houses or townhomes across many acres.

Most participants are active in Metro Vancouver, a few build homes in the Fraser Valley—the site of a great deal of production housing—and a handful are located elsewhere in the province. While the province's interior and northern communities have yet to begin adopting tiers of the Zero Carbon Step Code,[4] they will nonetheless be subject to the province's target that all new homes must achieve zero-carbon in their operations by 2030.

As with the Part 3 cohort, we sought out participants who occupied the middle ground—neither strong advocates for high performance construction, nor strident outright opponents of regulation. This aspect of subject recruiting proved challenging for Part 9, and in general we were more successful in screening out the former and less so on the latter. However, we do feel the participants represented the diversity of the sector in that both custom and production homebuilders.

2.1 Legitimacy of carbon regulation, benefit versus burden

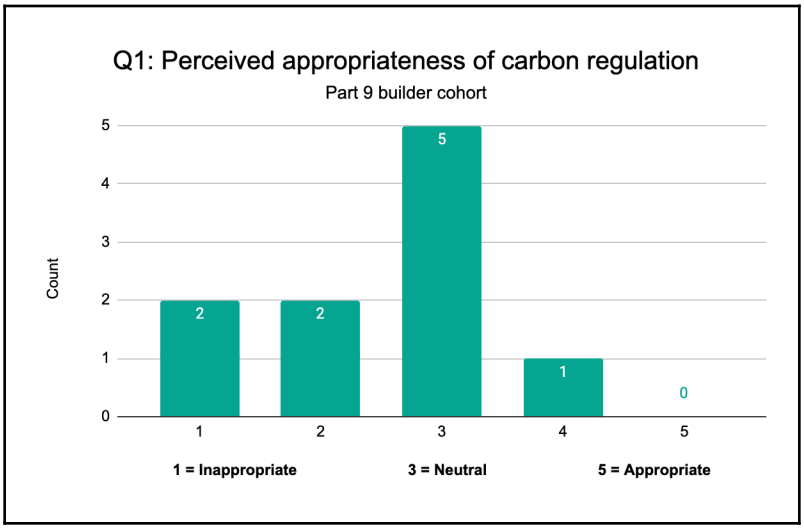
We began by exploring the degree to which participants perceive regulations that would seek to limit operational carbon from new buildings as **appropriate**.

We characterize the overarching mood as "conditional support." Most participants accepted, in principle, the underlying rationale for carbon regulation of their sector and viewed requirements through a lens of reduced climate risk and improved long-term resilience. They evaluated regulatory legitimacy through fairness, impact, and timing.

[4] Other than the first tier, EL-1, known colloquially as"report only." In practice, this means the energy advisor is highlighting for the builder and the building official the line in the HOT2000 energy report where the new home's carbon is already calculated.

Scoring

We asked interviewees to score the appropriateness of new construction carbon requirements on a five-point Likert scale, with a score of one indicating "completely inappropriate" and five denoting "completely appropriate."



This section proved to be a mixed bag for our homebuilder participants. While most understood that regulation played an important role in advancing objectives for the greater good, some struggled to make sense of the Zero Carbon Step Code. Most demonstrated limited awareness and understanding of its policy mechanism and raison d'etre, and the gist was that the regulation was adding complexity and costs to new homes at the worst time, and with a negligible immediate benefit to buyers.

One participant framed the issue by describing two extremes of the market. On the one hand, wealthy resource-sector executives are commissioning luxury show homes with gas or propane fireplaces and heat, and don't care about carbon emissions; on the other, first-time buyers are barely able to scrape together a down payment for a new production home, and an extra $10,000 on the sales price—the result of meeting elevated performance requirements, they said—effectively locks them out.

Themes

Participants generally appreciated the ZCSC's rationale. Half of Part 9 participants were either neutral or positive when asked to assess the legitimacy of carbon regulations such as the Zero Carbon Step Code. One participant admitted that "you have to regulate" to achieve objectives for the greater good of society, while another interviewee characterized requirements as a useful "kick in the pants," and acknowledged that, especially when it comes to environmental performance measures, voluntary measures alone were inadequate. But they also asserted that the regulation was unfairly targeting their sector on carbon when existing buildings continue to largely escape scrutiny.

Unlike the Part 3 cohort, several among this group expressed **uncertainty about how the Zero Carbon Step Code works**, and conflated it with the now widely known Energy Step Code.[5] The uncertainty was especially pronounced in the handful of participants who build homes outside of the Lower Mainland

[5] Ministry of Housing & Energy Step Code Council. (2024). BC Energy Step Code and Zero Carbon Step Code: A best practices guide for local governments (Version 3.0). Province of British Columbia.

and Southern Vancouver Island regions—where local governments have yet to reference the regulation in their bylaws. This points to a possible urban/rural awareness and understanding gap. Participants might be more open to supporting the regulation if they felt more confident about its mechanism and intent.

As with the Part 3 participants, homebuilders said that **economic impacts of the ZCSC eclipsed any perceived societal benefit.** Even where participants acknowledged the need and opportunity of lower emissions, almost all cited upfront cost, perceived missing of extended payback, and even generational injustice—not through the lens of younger British Columbians who will face harsh climate impacts that they did not create, but from never being able to afford a home. One respondent said that, in his experience, families prioritize space, shelter, and affordability over high-performance features, especially when those features add tens of thousands of dollars to a home cost.

Finally, to participants, carbon regulation often felt **too abstract or too difficult to translate into practical value for homeowners**. They were more comfortable with rules they viewed as concrete and observable than with requirements that depended on modelling or experts. One said that vehicle pollution made intuitive sense because it was visible as exhaust, whereas carbon-related building standards became 'nebulous' once they were filtered through energy models and arcane metrics. Another expressed frustration that they were paying energy advisors for reports that neither builders nor customers fully understand, and that they cannot convincingly explain or connect to a customer benefit. Finally, another participant said that, even when they sold the broader idea of healthier, better-performing homes, homebuyers often responded that what they really needed was more house for less money, not a technically superior product with less perceived value.

This disconnect helps explain why support was often qualified. Participants acknowledged the role of regulation, but felt the ZCSC policy case did not feel **tangible, trustworthy, nor easy to communicate**. In that sense, the issue is at least in part one of policy communication and issue salience: The long-term public rationale may be real, but many interviewees felt they lacked a clear, usable "value proposition" story.OBJOBJOBJOBJOBJ

Quotes

"When you ask if it is a net positive to everybody in society, I see the cost. Because when we approach homeowners and say, 'Okay, the city wants you to put triple glazed windows, and they want you to change that gas boiler to electric.' People with the best intentions will go, 'How much does that cost? And how much is that saving me on my energy bill?' And it's not crystal clear or there's not a huge net benefit, and then you lose interest really fast."
—Participant 201

"When [I was introducing] the idea of a net-zero home and speaking with the family about all the benefits that come along with tighter envelopes, and the overarching feedback I got was, 'That's awesome. I love the sound of that. But what we really need is more space in our house. So, like, maybe

not with this house, maybe down the road with the next house when we build our forever dream home, but [high carbon performance is] not what we need right now.'"
—Participant 204

"Look at all of the [existing] building stock that is in the province. It is puking out emissions and carbon. So why are we penalising the new construction [sector] so heavily?"
—Participant 209

"I don't think with the zero carbon code, that it's fair for [governments] to force people to act on it entirely. There's no confidence that it has… met the objective. You can measure [results] a lot easier, I think, with the energy side of things than you can with the carbon."
—Participant 206

"It's important that we understand that we do have an effect on [the climate], you know, we should be conscious. And I think the government can do a good job of letting us know some options or some choices that we could make. But regulating it and making us go through other steps? I'm not sure that what we need to do now is pay our energy advisor some more money for a bunch of stuff we don't even understand, and maybe he doesn't even understand, but it comes out of his computer. And we've got to meet this level, and we're looking at it and we're going, 'Okay, well, we paid extra money for that…'"
—Participant 208

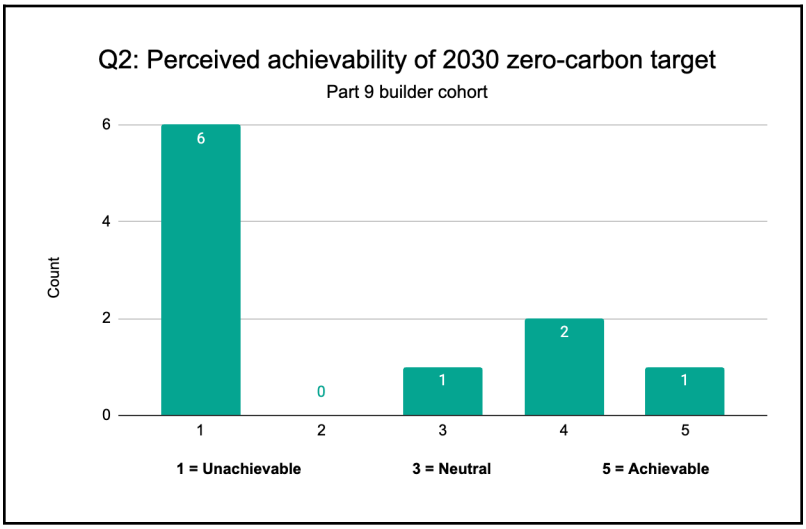
2.2 Regulatory ambition and pace of change

As with our Part 3 interviewees, we then tested the perceived **achievability** of the Province of British Columbia's target under CleanBC that all new buildings must achieve zero operational carbon by 2030. We also asked participants to describe the conditions that would need to be in place to achieve the province's goal.

Scoring

We asked participants to score the perceived achievability of the province's overarching goal that all new buildings must achieve zero carbon in their operations by 2030.

This suggests a strong skepticism about the province's decarbonization ambition—even among those who accept the importance of emissions reductions.



Themes

The dominant view among participants was that while zero-carbon new construction is technically feasible, **the province's 2030 target timeline is not**. Most scored the target as unachievable. Several suggested that their industry is still absorbing the requirements of the Energy Step Code, and that adding operational-carbon expectations on top of that within four years compresses too much change into too little time. One participant said that many builders are still struggling to meet the requirements of Step 3 and are already anxious about Step 4 and Step 5—making looming zero-carbon requirements feel like an even harder leap. One participant who was otherwise optimistic about theoretical achievability said the timeline puts "too much pressure" on industry and risks pushing unproven systems too quickly into buildings that are intended to last decades. Put another way, participants called out what they see as a mismatch between policy ambition and the speed at which builders, suppliers, and building officials can realistically learn, adapt, and deliver.OBJ

Participants identified the main barriers to achieving the target as **beyond the boundaries of their own companies**. They pointed to a wider ecosystem that they view as ill-prepared for a 2030 zero-carbon mandate: Electricity infrastructure, permitting backlogs, product availability, training capacity, experienced advisors, and alignment among architects, designers, inspectors, and municipalities. One cited perceived lack of grid readiness as the lead constraint, tying the feasibility of electrification to climate-zone realities, outage frequency, and local operating costs. Another was more concerned with municipal process, citing extensive permit timelines that inflate costs and undermine the affordability needed to secure buy-in for higher-performance systems. In short, participants consistently expressed that the homebuilding ecosystem does not yet have its ducks in a row for zero-carbon buildings by 2030.

Many participants interpret the approach as marching them towards an abstract and arbitrarily imposed deadline, and suggested they would be more accepting of a **more transparent and confidence-building pathway**. They signaled a level of discomfort with how the province and local governments are

managing the transition. For one participant, the 2030 target remains something of a question mark; builders do not yet have a sufficiently clear picture of what zero carbon will actually entail, they said, asserting that "everybody needs to be up to speed." Interviewees seemed more open to a transition they could see, sequence, test, and explain, than to one that appears to arrive as a compressed deadline. That suggests the snag is at least in part about implementation design: A process that allowed the sector more breathing room, more opportunities to build confidence, could gather more support than an endpoint that many currently view as disconnected from practice.

Participants are not simply digging in their heels and fighting needed change; their comments suggest they could potentially get behind a regulatory approach that to them, in some respect, feels more visible and realistic: i.e. with more generous timelines, and a corresponding effort on the part of governments in capacity building across the industry ecosystem.

Quotes

"The people making [performance requirements] decisions, municipality by municipality, are typically a little out of touch with the people that actually have to do the work. It's sort of like the way [Prime Minister] Trudeau said he was going to build, whatever it was, half a million homes per year? He was out of touch with the reality of who's going to build all this. The individual ambitions of the municipalities, where they set their standards, are a little out of touch with what the industry can keep up with."
—Participant 206

"Any kind of regulatory movement right now with target dates of 2030 or 2032, all of that has to come off the table. We should just be pulling fricking plugs out of the wall everywhere possible to drive affordability into homes because now it's punitive. Everything is punitive."
—Participant 203

"Just make sure I heard you correctly: [The target is] 2030, as in, *four years from now?!* And to clarify zero carbon, are we still allowed to use concrete?"
—Participant 205

"I kind of equate it to the electric-car scenario. Not everyone could switch to electric cars tomorrow. I think there's going to be that intermediate step where people are buying hybrids instead of full-on electric. Four years is just too short of a period."
—Participant 205

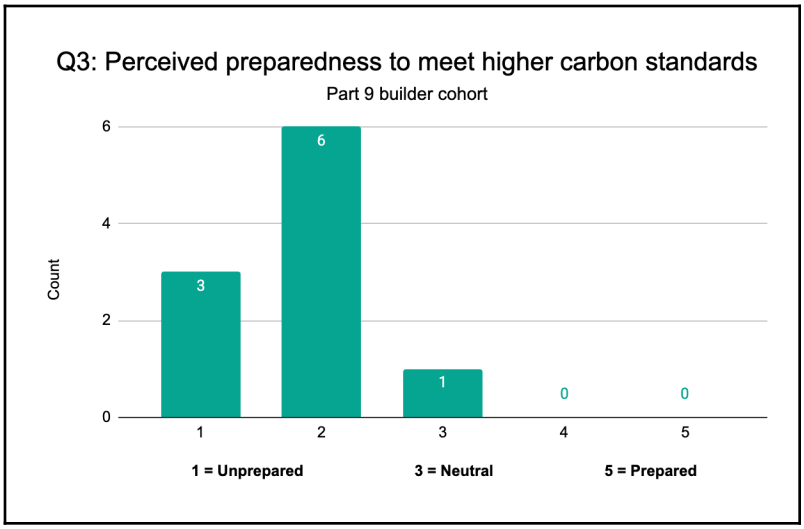
"It's not going to happen in 2030. It's already 2026, and we still have the government also wanting us to meet [BC Energy Step Code] Step 5, Right? And then with Step 5, you [also] want to calculate your emissions. And, not only that, there's also the fire bylaw as another big piece of the puzzle. And with everybody densification, there's so many challenges. And again, going back to affordability, in every municipality in BC, development cost charges have gone up over 100%. [All local governments are]

reviewing their [Development Cost Charges] because everybody's reviewing their [Official Community Plans], and that adds cost to the house."
—Participant 207

"We've been working on the [Energy] step code for 10 years. And we're right now at Step 3, and guys are still struggling to get [there]. Step 4 comes [next year], and guys are freaking out because it's going to cost them so much money. And then Step 5, net-zero-energy ready, is supposed to be 2032. And that's going to be easier to achieve than the zero carbon [requirement]. Even [where we are today] at Step 3, we're still a decade ahead of Alberta. We're decades ahead of Saskatchewan. Manitoba is probably only five years behind us; Ontario is five years behind us. So we're already light years ahead of the rest of the country. Why are we going to put a bullet in our head and completely collapse construction?"
—Participant 209

2.3 Market readiness and impacts

In this section, we asked participants to weigh in on industry **preparedness** to meet the province's 2030 target. The findings indicate a low level of perceived overall readiness. A relatively small number of firms are building capability, but the broader sector is held back by low understanding of the Zero Carbon Step Code and dependence on suppliers and subcontractors that adapt only when forced.



Scoring

We asked participants to score their perception of how prepared their industry is to deliver low or zero-carbon buildings. The scoring points to a strong overall perception that the industry is not ready for the province's 2030 target. While a few firms may be ahead of the curve, most participants saw readiness as limited, uneven, and far from broad-based across the sector.

Themes

Participants expressed a consensus view that their sector is **not yet equipped with the knowledge and capacity** needed to deliver low- or zero-carbon homes—even though a handful of companies are already doing so. Several participants drew a gap between a relatively small group of early adopters who build high-end custom homes and the wider market of production home builders. Participants described a market in which some firms are trying hard to adapt, but where the broader delivery chain is not yet

aligned. One said their own company may be relatively prepared, but it is only as strong as the two dozen trades working alongside it, many of whom do not have the time, incentive, or bandwidth to absorb changes until forced to do so. The result is a portrait of "uneven readiness" rather than outright incapacity. A handful of companies see opportunity and are building capacity, but participants consistently suggested that their peers remain only partially prepared. The ecosystem of subcontractors, advisors, suppliers, inspectors, and clients moves at the speed of its weakest links.

When pressed to identify bottlenecks, interviewees cited **workforce knowledge and implementation quality**—not just equipment availability—as the main market bottleneck. Others appeared less concerned with the performance of heat pumps and other technologies, and more with the confidence of their installers; one worried that contractors would oversize the systems "just to be sure," undermining cost-effectiveness and performance. Another raised a related concern about over-reliance on energy advisors, arguing that many builders do not fully understand how they are meeting current code and that even that the advisor pool may be thin on real-world experience. This points to a possible credibility problem in implementation; interviewees worry that the system may produce technical compliance without shared understanding. In this sense, they interpreted "market readiness" less as product availability and more as the maturity of applied knowledge throughout the sector.

Reiterating a concern expressed in Section 2, interviewees do not see market readiness as something the industry can solve on its own. They repeatedly tied preparedness to **external conditions beyond their direct control**. One said that the province is effectively mandating electrification without the grid and local infrastructure required to support it, including cases where servicing costs become prohibitive. Another put "grid readiness" at the top of their concern list. Demand-side realities also loom large in the equation: Two participants described customers who prioritize affordability, comfort, or visible finish choices (yes, "countertops") over lower-carbon systems, making it harder to translate policy goals into market pull. Participants see market readiness as highly contextual. It varies by region, by company size, by infrastructure conditions, and by client base. The message was that a top-down mandate will land very differently across the province.

Quotes

"If you're talking to a high-end custom builder that builds two net-zero houses a year, well, yeah, they'll be able to get to zero carbon, no problem. But go down into Surrey and talk to the guys that are building houses that barely stand. They're not going to have a hope."
—Participant 209

"As a general contractor and as a business owner, I am 'all in' on learning as much as I can. The issue is with our subcontractors. We're using smaller companies—plumbing, electrical, mechanical contractors. They're really, really great at what it is that they're doing. Their primary objective, though, is not making a difference in the world. Their primary objective is to get in, get out, make some money, go home. They don't have time to go to school. They will do it when [they're] forced, when the inspector tells them to do something else, but they're not going to do that [before then]. There is a huge learning curve."

"It's too expensive, the infrastructure is not present, the sub-trades are not educated, and [the Energy] Step Code higher than Step 3 is already overkill."
—Participant 202

"Larger companies who are doing a lot of volume might be a little bit more prepared. And if there's something coming at them that's maybe difficult, they'll just hire another person or two to handle the paperwork, and the making of some better choices, or whatever, and they just keep on going. Then there are the little guys building 35 homes a year, or 10 homes a year. They don't have that. They'll just slow down a little bit, and build one less home, and try to put up with all of the new regulations that are giving them no extra profit. It's giving them no extra volume. They're just going to struggle a little bit more than they already do."
—Participant 210

2.4 Influences and information sources

In this section, we asked participants to reflect on what shapes their views on carbon requirements. We asked about trusted information channels, who they listen to, and the conditions under which they might consider changing their minds on regulations.

Participants said their views are shaped less by government or mainstream media than by trusted industry networks and firsthand experience. They tend to trust information that feels balanced, practical, and proven in the field, while broader beliefs and values still play a major role in how they interpret regulation.

Note: We did not ask participants to provide scores in this section, nor the next one.

Themes

As with our Part 3 developer interviewees, homebuilder participants almost universally relied on **peer, association, and practice-based sources** to stay informed about regulation and related issues. They keep a close ear on industry-mediated channels such as updates from their regional homebuilder association, trade partners, and conversations with other builders at conferences. One participant said they listen to one or two construction podcasts, but always ground-truth whatever they hear against their own direct project experience. Even those participants who reported consuming broader media seemed to treat it as secondary to what they hear from other builders. That suggests they perceive the climate challenge less in the context of what we might call the "broader public conversation" and more through industry filters that translate policy into direct business implications.

Participants evaluated trust based on whether information presented **appeared balanced, experienced, and aligned with their lived experience**. Participants described applying informal credibility tests: Does the source acknowledge competing views, have long experience, and align with their observable reality?

One source said they regularly bounce information off a long-trusted energy advisor. Another said they are skeptical of information that is too easy to find (or simply "Googled") and instead lean on their industry association and a narrower set of sources that have proven their worth over time. Still another said they try to stay open-minded, and are willing to change their mind when presented with new information, but distrust news reports and what come across as overtly political messaging; they look for independent voices that to them feel less scripted. In short, this crowd trusts sources that feel seasoned and grounded in real-world experiences. For those communicating policy, technical accuracy alone may be inadequate; the message must also "ring true."

All of the above notwithstanding, opinions on carbon regulation in this group are not simply a product of business interpretations. Participants are also **interpreting new requirements through different frames**: Continuous learning, market pragmatism, long-standing technical practice, or distrust of political narratives. In other words, opposition or support is being filtered through world views and values. The same policy can be understood by one participant as prudent modernization comes across to another as government overreach, or weakly evidenced intervention.

Quotes

"I might see something, a news article, or something I learn in a course, and just kind of overlay that with what I observe in my own personal experience. Then you just kind of ask yourself, what jibes and what doesn't, and then just try and apply critical thinking."
—Participant 201

"I read as little as possible [from mainstream news outlets]. It's all depressing bullshit."
—Participant 209

"I'm not so bull-headed that I have one opinion, and that's it, come hell or high water. I am very okay if I say something publicly and six months later, or a year later, I say something that conflicts with that because I now have new information."
—Participant 204

"I read various national and provincial publications, the regular, 'legacy type media.' I try to very get different perspectives from different places, but I'm sure that the algorithms take care of that."
—Participant 210

2.5 Closing reflections

In this section, we invited participants to share general feedback for governments on any aspect of how they design, implement, and/or share information about carbon regulations for buildings. We encouraged them to speak candidly about their pain points and concerns.

The strongest thread running through this section: Participants urged governments to spend **less time designing policy requirements at a distance**, and **more time speaking directly with the people expected to deliver on them**. One pointed to the rollout of the BC Energy Step Code (2017-2020) as a gold standard approach because regulators extensively consulted industry, adjusted metrics based on field feedback, and invested in local education efforts that helped prepare builders before requirements became mandatory. (They reported considerably less such activity with the ZCSC.) Another called for a more collaborative permitting culture, where builders can raise issues early without fear of triggering extra costs or what can feel like rigid and arbitrary enforcement. Still another felt like the ZCSC has been presented as a finished agenda from above. Two others argued that policy makers need to be more embedded in industry associations, committees, and real-world conversations to understand the outer edges of feasibility. In summary, participants expressed that they often feel engagement boils down to a box-ticking exercise. They want policy to be informed by hands-on, sector-specific knowledge from the get-go.

This section of the interviews also confirms that **participants most want policy makers to understand the consequences of cost impacts**. One participant recognized that every new technology or standard comes with a learning curve and a real cost of transition, and that it always ultimately lands on homebuyers. One interviewee said bluntly that low-carbon buildings "cost too much"—not just because of equipment, but because of the bureaucracy, paperwork, and consulting layers that come with implementation. Another worried about unintended consequences, warranty exposure, and being forced to play the role of de-facto guinea pig on building approaches that they said may not prove out over time. Finally, another participant said that even the most worthwhile initiatives fail when governments underestimate the burden they place on small firms already operating on thin margins. Taken together, the overarching vibe is that policymakers are underestimating the risks borne by builders, small businesses, and ultimately buyers.

Closing comments were **not uniformly anti-environmental or anti-improvement**. Several participants emphasized that they support better building standards and continuing improvement. Two of them emphatically endorsed the importance of training and building-science education, as required under licensing provisions. At the same time, both of those two interviewees argued that carbon feels like one more confusing requirement added on too quickly, across the board, and in regions and at production volumes where its overall impact on emissions would be negligible. What may appear plausible in Vancouver or Victoria does not look the same in colder, more infrastructure-constrained regions, they said. The dominant message overall is not simply "stop." It is slow down, simplify, tailor the approach to regional conditions, and build on what industry already feels is working.

Taken together, these comments suggest that participants experience the current policy approach less as a collaborative market transition than as a top-down compliance exercise. That perception may itself be contributing to resistance, separate from the substance of the requirements.

Quotes

"The number one thing that the government lacks is information themselves. They don't understand the collateral damage of what a stroke of their pen does."
—Participant 203

"How can you be in an office and make decisions about how our industry is going to save the world, if you're not actually getting the dirt under your fingernails yourself?"
—Participant 210

"I wish governments would be more leaders in educating the general public about why these standards are coming down, like net-zero or zero-carbon. They do that with the recycling programs. I would love to see if they could be more proactive about educating the public."
—Participant 205

"What we're doing right now, at this moment, is great. The fact that you're sitting here and you're questioning me, and getting my opinion on things is a great first step."
—Participant 204

3. Conclusions

In the 20 interviews, consensus emerged across a number of meta-level perspectives.

1. **"This actually isn't a good time. Can you come back later?"**

- Participants did not reject building decarbonization. Most accepted, at least in principle, that governments have a legitimate role to play in reducing emissions from new construction. But support was often conditional, qualified, and fragile.
- The key tension running through the interviews is the perceived mismatch between policy ambition, timing and implementation, and market realities. Participants described a mismatch between where policy is headed and what the sector feels equipped to deliver today.
- The economic slowdown looms large. One said that the single family new-build market has completely "dried up," and that builders are declaring bankruptcy.

2. **Between a rock and a hard place**

- Participants, especially Part 9 builders, expressed deep concern with anything that could add cost in an extremely tight market, but also emphasized this is a broader ecosystem-readiness problem.

- Worries about perceived electrical capacity crunch, connection timelines, permitting delays, product availability, skilled labour, and uneven municipal readiness surfaced repeatedly.
- In that sense, many interviewees portrayed the transition as being constrained by systems beyond their direct control, including utilities, regulators, local governments, and supply chains.

3. **The uncertainty principle**

- There were important differences between Part 3 and Part 9 participants, but they were differences of degree more than direction.
- Part 3 developers were generally more technically conversant and more likely to support carbon regulation in principle, yet they often expressed frustration with what they saw as limited government understanding of project economics, financing constraints, and the cumulative effect of layered requirements.
- As a group, Part 9 builders were somewhat less informed about the policy framework—some did not know how the Zero Carbon Step Code works—and more likely to equate building decarbonization with a mix of cost pressure, confusion, and compressed timelines.
- For both groups, however, uncertainty emerged as a central barrier. They did not feel confident about what would be required of them, when, and they worried about lack of perceived value in the market.

4. **Process matters**

- Many appeared more open to a transition pathway that felt visible, practical, and in some respect "verifiable" than to one perceived as top-down, abstract, or disconnected from conditions on the ground.
- Several comments suggested that the Zero Carbon Step Code feels much less like a collaborative market transition, and more like a compliance exercise imposed by institutions that do not fully understand how projects pencil out. (This view is in stark contrast with perceptions of how governments rolled out the BC Energy Step Code.)
- That perception may itself be contributing to resistance. At the same time, a number of participants welcomed being consulted via this research, and indicated that more grounded engagement could improve both trust and policy durability.

Taken together, these findings suggest that the central issue is not whether the sector can ever deliver lower-carbon new buildings. It is whether governments can build a pathway that industry experiences as **credible, coordinated, and workable**. For many participants, stronger requirements become more

acceptable when they are paired with predictability, implementation support, and a clearer sense that governments are taking seriously the operational constraints facing builders and developers.

4. Implications for climate-action advocates

This research holds a number of lessons for organizations that support carbon requirements for new construction and who wish to be more effective in their communications and advocacy work.

First and foremost, participants generally accepted the legitimacy of regulations that target carbon from new buildings. Those expressing opposition were not "making excuses" for inaction, but instead underscoring that decarbonization carries both real costs and risks for them, without any corresponding market pull. They see themselves as navigating business-case constraints, infrastructure bottlenecks, permitting friction, workforce gaps, other code changes and requirements for matters such as accessibility, and customer price sensitivity.

Advocates might therefore consider placing less emphasis on moral urgency and more on implementation credibility. Instead of portraying regulation as a test of climate commitment, they might present it as a managed transition that must be designed and implemented with greater care. That does not require advocates to lower their ambition. But it does challenge them to show that they understand the delivery context well enough to champion rules that are not only strong on paper, but workable in practice. The most effective advocacy may be that which combines ambition with increased fluency in how projects actually get built.

The research also suggests that there may be an opportunity for advocates to pursue the pain points that participants have flagged. For example, from a Part 3 perspective, if zero-carbon or climate resilience investments carry a cost premium that is unacceptable or not assigned value by Canada's insurance, finance, and valuation sectors, those actors might benefit from some focused attention. This could help advocates build trust with developers who genuinely want such buildings and systems but are held back by the institutional constraints of the larger economic ecosystem within which they operate.

Also of note: Participants said their views are shaped mainly by direct project experience, trusted consultants, peers, and industry associations. They described themselves as open to persuasive evidence where it addresses the business case, infrastructure realities, and lessons from completed projects. This suggests that advocates may find traction when they work through or with technical experts and respected practitioners, rather than relying on public-facing pressure tactics.

This also reinforces the value of case-study-driven communication and a stronger and regularly updated library of proof points: Credible project examples, cost evidence, implementation lessons, and accounts from peers that have successfully delivered lower-carbon projects. In short, practical evidence is likely to travel further than abstract claims about "what ought to happen, by when, and why."

Appendix A: Methodology

Between October 2025 and March 2026, Bright Future Studio conducted 20 structured, anonymous interviews with members of British Columbia's buildings and development industry. The pool of participants was evenly split between developers of larger and more complex buildings ("Part 3 developers") and builders of smaller, ground-oriented housing such as rowhouses and detached homes ("Part 9 builders").

Geographically, 12 participants worked in Metro Vancouver, two in the Capital Regional District, and the balance served markets in the Fraser Valley and beyond.

Interviews explored perspectives on regulatory ambition and timelines, industry readiness for higher performance requirements, and the role the sector sees for itself in addressing climate change. We also sought to understand the factors that inform participant views, including how they stay informed and who or what, if anything, shapes their perspective on climate regulations. The shortest interview ran for 31 minutes, and the longest 68 minutes.

For recruitment, we relied on industry contacts, relationships, and referrals. We sought out participants most likely to be directly impacted by building-code changes. That is, we professionals focused on delivering custom and production ("spec") homes, and commercial properties, including those that acquire and/or assemble land and that pursue rezonings.

We intentionally screened out individuals who strongly support and/or vocally advocate for strong building performance and associated voluntary standards, such as the Passive House certification. We also aimed to exclude those at the far opposite end of the spectrum on such matters. Each of the participants will receive an honorarium and a copy of this research summary.

During the interviews we asked participants to provide a numeric score for three questions, and tabulated the results by hand. We identified themes by grouping together responses to each of the four major interview sections and highlighting points of alignment.

A note about large language models: We used Microsoft Azure AI Speech, Google Gemini, and Rev Reverb ASR to generate transcripts of recorded interviews, and confirmed accuracy against original recordings when highlighting quotes. We used OpenAI's ChatGPT 5.4 to organize the content of anonymized transcripts, grouping them by section, and to occasionally assist with language and phrasing in this summary. We did not use AI for analysis or insight.

This document constitutes the final report of the British Columbia cohort of Phase 2 of the Clean Cities Research Project. It is available online at ecoanalyticscanada.org/research/clean-cities-research-project

Appendix B: Organizations

EcoAnalytics Research Initiative

EcoAnalytics Research (ecoanalyticscanada.org) provides comprehensive opinion research to inform public debate, advance environmental protections, and strengthen the nation's environmental movement. A project on the shared platform of MakeWay Charitable Society, EcoAnalytics brings together influential NGOs and researchers to collaborate in mixed research and new methods of inquiry that reveal the opinions and knowledge of audiences about environmental issues and the most compelling frames and messages for engaging key audiences.

Bright Future Studio

Bright Future Studio (brightfuture.studio) is a communications, branding, and research consultancy supporting Canadian industry, government, and civil-society leadership in the global clean-energy transition. Over more than a decade, the Vancouver, B.C.–based company and its predecessors have produced numerous brands, campaigns, strategies, reports, and other resources that have helped decision-makers reduce emissions, transform markets, and strengthen communities. Company president and founder James Glave has extensive experience and expertise communicating and advocating for climate solutions in the built environment.