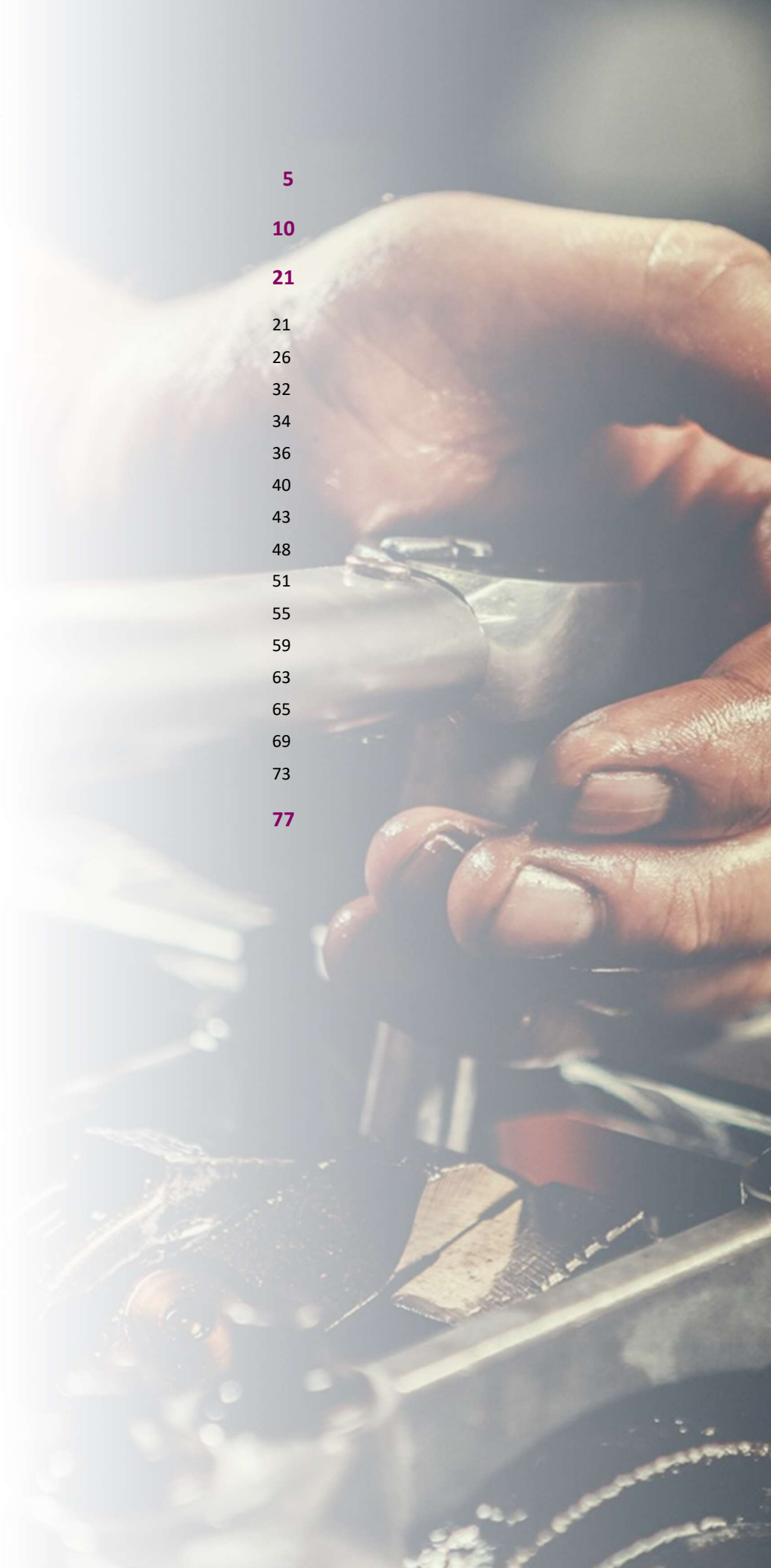


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Introduction

When the town of Berkely California proposed to ban natural gas hookups for new construction in 2019, the gas industry was put on notice. Although the city has recently repealed that legislation, the effort to decarbonize building heat has not abated. In fact, many states in the past few years have begun to address building decarbonization.

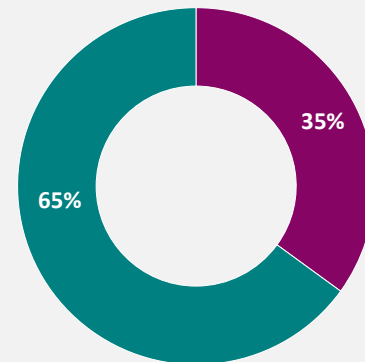
The options on the table are transformational. The chosen pathway affects not only the future of the fossil gas industry, but what kind of appliances we will purchase, how much electricity demand we will need to meet, the potential of non-fossil gas alternatives, and the impacts on employment, gas safety and affordability.

There is no clear and obvious approach. Most alternatives are costly, and any transition is very difficult as it requires coordination of various industries.

As such, each state is handling things differently. But what is happening? What options are being discussed? What has been approved? Where is this heading? How fast will this take place?

This report aims to answer these questions by analyzing developments at the *state regulatory commission level*. Our focus is on what regulatory commissions have approved since 2019 related to future of gas proceedings. While there have been many studies on which states are legislating gas bans and which ones have bans on gas bans, there has been less literature on regulatory developments. This report fills that gap. At times, we need to include some legislative items to provide context on regulatory developments, but this is not the primary focus of the report and is not comprehensive. For instance, it does not cover building code changes. We are not advocating a particular position, just examining what is being done as objectively as possible. We are looking at six key decarbonization strategies, which we will introduce in the following pages.

Sources of Carbon Emissions in US



■ Building Heat
■ Other including transportation, agriculture

