

2026 STATE POLICY WEBINAR SERIES

2026 State Policy Outlook From:



CLEAN AIR
TASK FORCE

REWIRING
AMERICA

≡ **CEN** ≡
CONSERVATIVE
ENERGY NETWORK



March 4, 2026

CATF at a Glance

Founded in 1996.

A **global nonprofit** with offices in Boston, Washington, D.C., and Brussels with staff working virtually around the world.

Our Mission: Push the technology and policy changes needed to achieve a zero-emissions, high-energy planet at an affordable cost.

Our Vision: Meet the world's rising energy demand in a way that is financially, socially, and environmentally sustainable.



Speakers



Jeremy Tarr

U.S. State Policy Director, Clean Air Task Force



Kristin Eberhard

VP of External Affairs, Rewiring America



John Szoka

Chief Executive Officer, Conservative Energy Network



Julie Cerqueira

Chief Program Officer, Natural Resources Defense Council



CLEAN AIR
TASK FORCE

Clean Air Task Force



2026 State Policy Outlook

U.S. State Policy Program



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U.S. State Policy
Director



Wibke Heymach
Senior Midwest Regional
Policy Manager



Dan West
Senior Western Regional
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Senior Northeast
Regional Policy Manager



Ashley Arax
Senior California
Policy Manager

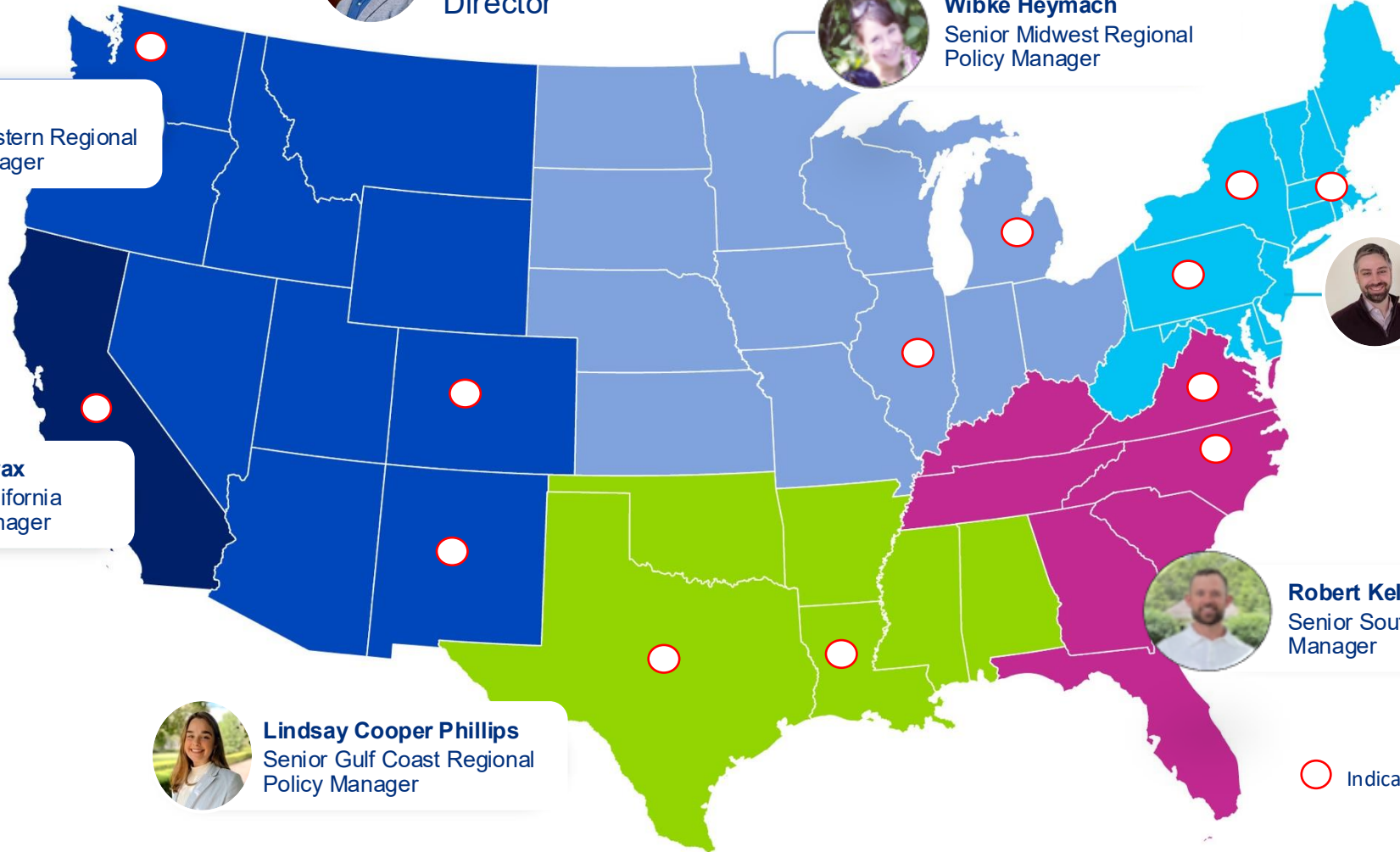


Robert Kell
Senior Southeast Regional
Policy Manager



Lindsay Cooper Phillips
Senior Gulf Coast Regional
Policy Manager

 Indicates priority states



2026 CATF State Policy Priorities

Near- and long-term emission reductions

- Focus on high-emission U.S. sectors to advance global decarbonization (e.g., power, industry, transportation)
- Advance technology-neutral policies that allow optionality (e.g., CES, LCFS)
- Promote energy affordability by focusing on low-cost decarbonization policies and technologies
- Update energy system planning processes for full decarbonization

Innovative technology deployment and scaling proven technologies

- Deploy innovative technologies in the power, industrial, and transportation sectors while scaling established technologies. Power sector technologies include renewables, nuclear, geothermal, fusion, NG+CCS, and transmission
- Update siting and permitting policies to support accelerated deployment

Policy progress across political contexts

- Secure policy wins and shape policy environment in red, purple, and blue states
- Pass innovative policies and programs that are replicable on other states and federally

Defend existing critical policies, fight off new harmful policies

- Federal government is threatening state authorities on climate and clean energy
- Defend established policies such as CES, GHG targets, RGGI, ACT, (ACC/ACCII, green banks)
- Push back on harmful policy proposals (e.g., anti-CCS, anti-renewables)

1. Load Growth & Affordability

Load Growth

- Significant projected near-term growth in electricity demand because of data centers, electrification, etc.
- Data centers should cover the cost of their energy demands
- Costs for generation, transmission, and system upgrades should not fall on ratepayers
- Opportunity to meet demand with clean, innovative technologies, in addition to existing clean resources.
- States are taking various approaches to manage data centers and load growth: taskforces, tariff structures, demand-side solutions, consumer protections, tax incentives or not, ecodesign and workforce strategies,

Affordability

- Political issue in 2025 (NJ, VA)
- Major issue in 2026 that clean energy / climate policies need to address proactively

2. Attention to Clean Firm Power

Clean Firm Power

Dispatchable, low-emission electricity generation sources that do not rely on the weather. Generate clean power on demand for an effectively indefinite period of time.

Examples: Nuclear fission, fusion, geothermal energy, fossil generation with high levels of carbon capture and upstream methane mitigation

Benefits

- Reliably deliver clean electricity whenever and for as long as it is needed.
- Reduced infrastructure buildout needed
- Reduced cost of power sector decarbonization
- Increase decarb speed: low land use, complement renewables and storage, diversity portfolios
- *Clean Firm Electricity Technologies: What, Why, How*

Policies: Tech-neutral clean electricity standards, modernized permitting, innovation/deployment funds, etc.

3. Nuclear Renaissance

Enabling State Policies

Significant momentum on nuclear energy in 2025, with more expected in 2026.

Examples

- IL full moratorium repeal and 2026 EO
- NY target of 5GW and decarbonization plans that include nuclear
- VA bill moving to allow hyperscalers access to nuclear
- Repowering Three Mile Island, Palisades, and others
- NASEO First Movers Initiative

Orderbooks

Firm commitments to build multiple units of a common reactor design, effectively sequenced over time reduces costs by spreading out first-mover costs, triggering supply chains and workforce, transferring learnings to future projects, etc. Orderbooks can be paired with federal cost overrun protections to protect ratepayers and enable financing.

4. Transmission Policies

Transmission Public Financing

Public financing and ownership models can reduce ratepayer costs of transmission buildout.

- CA passed enabling legislation (SB254) fall 2025
- Other states considering options

Transmission Siting Authorities

These are state agencies dedicated to facilitating the siting and financing of new transmission lines. They can coordinate buildout to speed implementation and financing, assess/support alternative financing models, issue bonds to finance, coordinate with federal entities and other states.

- NM and CO have siting authorities. States in the PNW and NE are considering.

Community Benefits Agreement Models

CATF and EDF conducted intensive research on community benefits mechanisms for six energized transmission lines. We identified and evaluated the range of CBA models used: Host community agreement, transmission partnership agreement with a non-profit, tribe part owner of the project and earns a profit, legal settlement

5. 2026 Elections

2026 Elections

- 36 governors, thousands of state legislators, federal House and Senate, and utilities commissioners

2026 Policy Implications

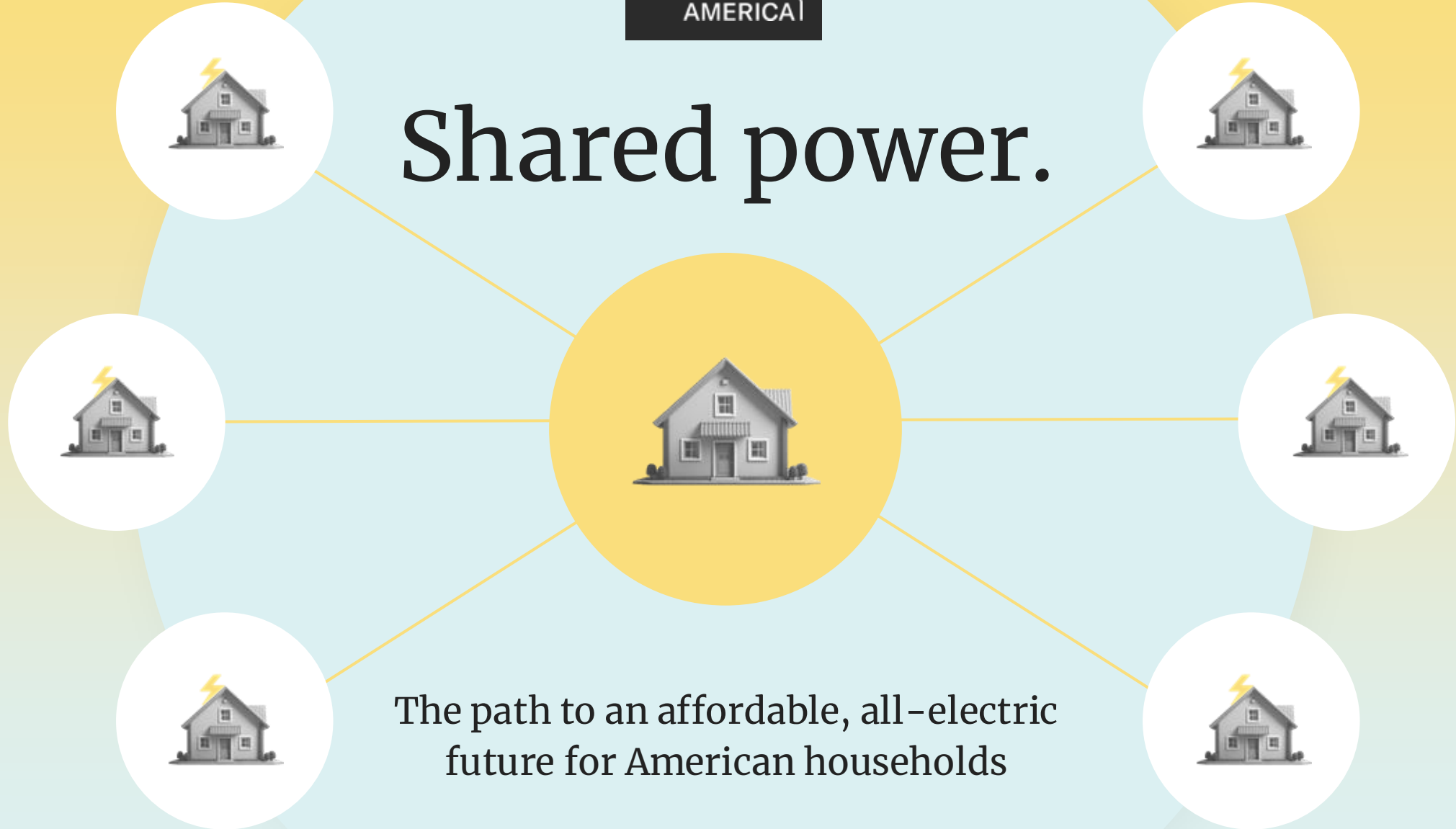
- Potential slowing of policy activity leading up to elections, due to diverted attention and cautiousness. Legislatures may break for primaries and elections.
- Potential final policy push with termed-out electeds
- Potential surge of policies in lame duck period after elections
- Opportunities to educate candidates, transition teams, and newly elected officials

A satellite view of the Earth at night, showing the Western Hemisphere. The United States and parts of Canada and Mexico are visible, with city lights glowing as bright yellow and orange spots against the dark blue of the oceans and the black of the night sky. The horizon of the Earth is visible at the top of the frame.

|REWIRING
AMERICA|

Rewiring America

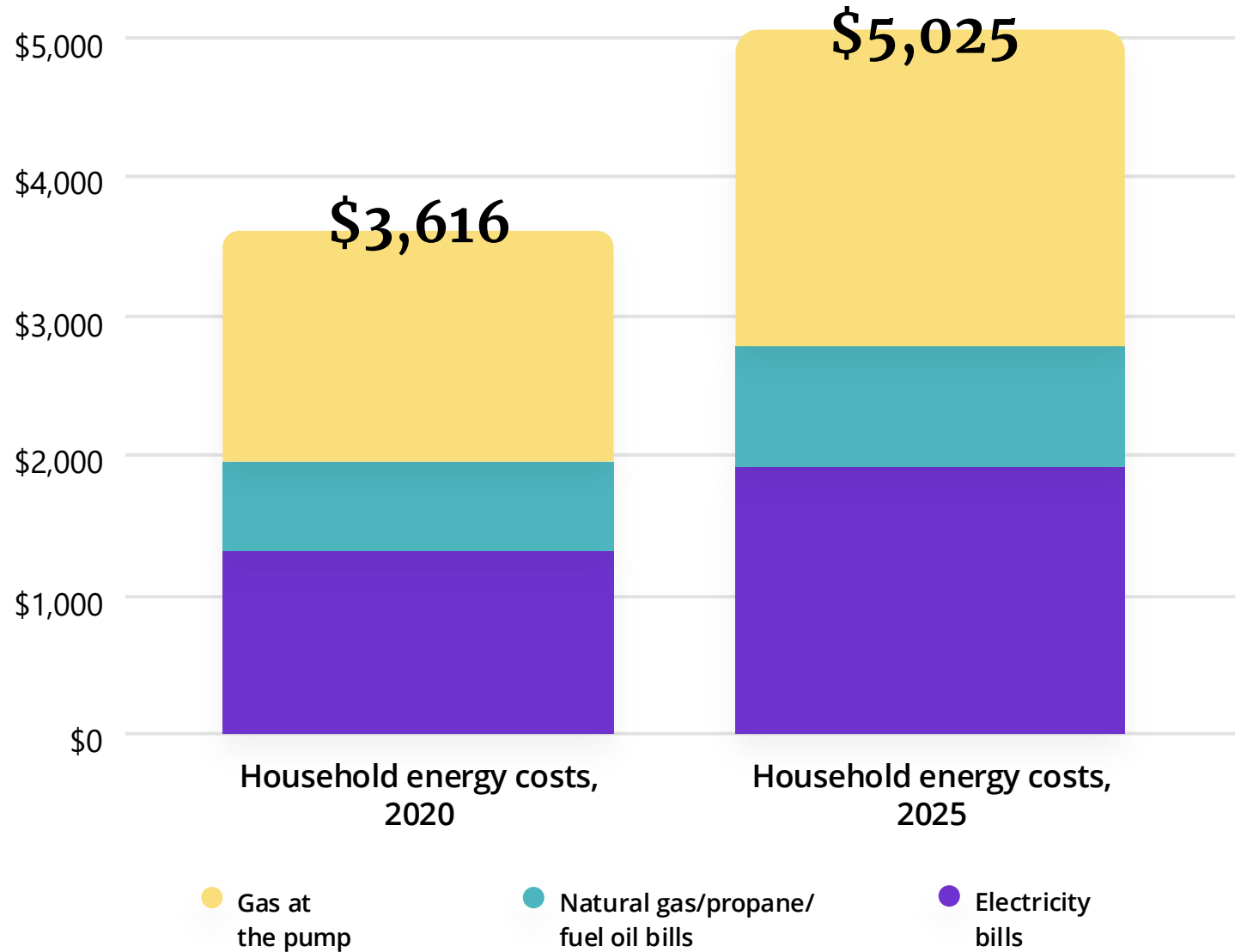
Shared power.



The path to an affordable, all-electric
future for American households

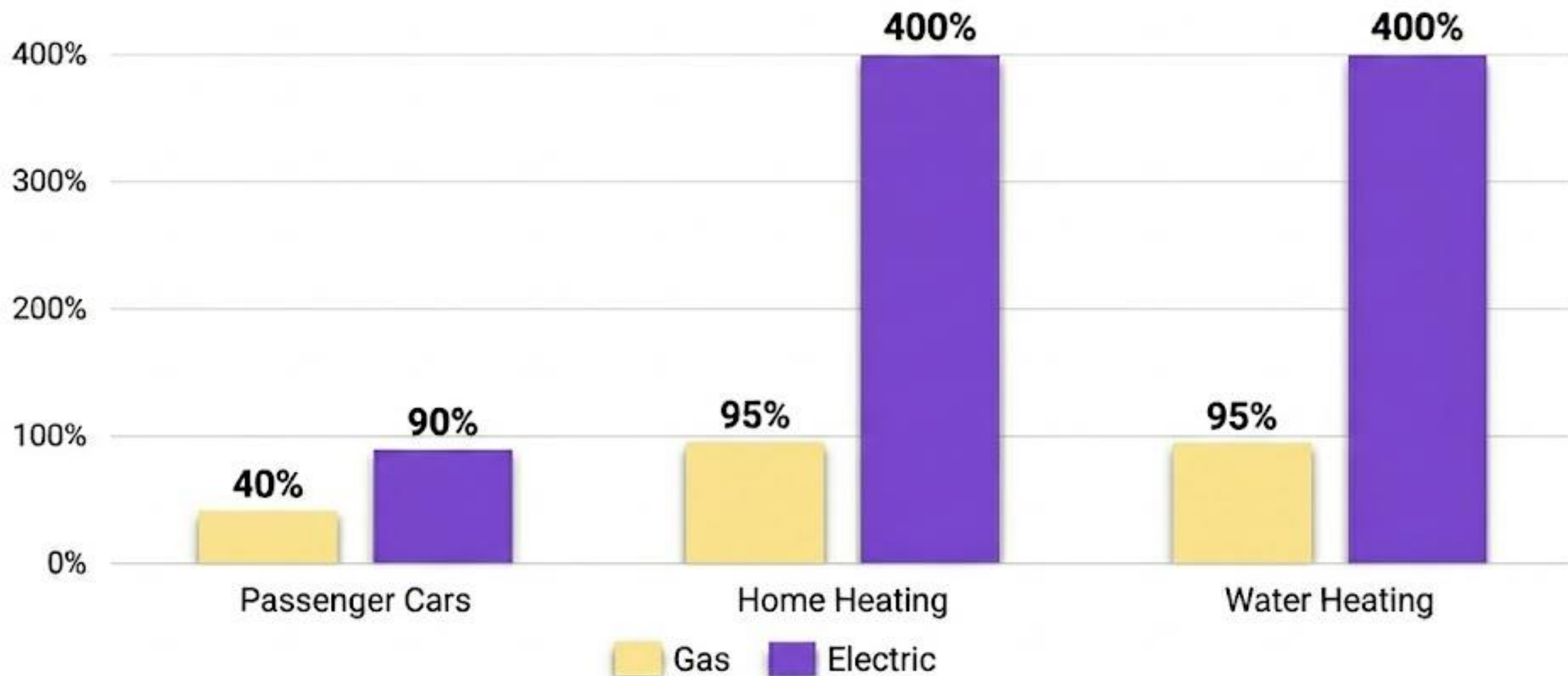
BILLS, BILLS, BILLS

Rising energy costs are hurting American households.



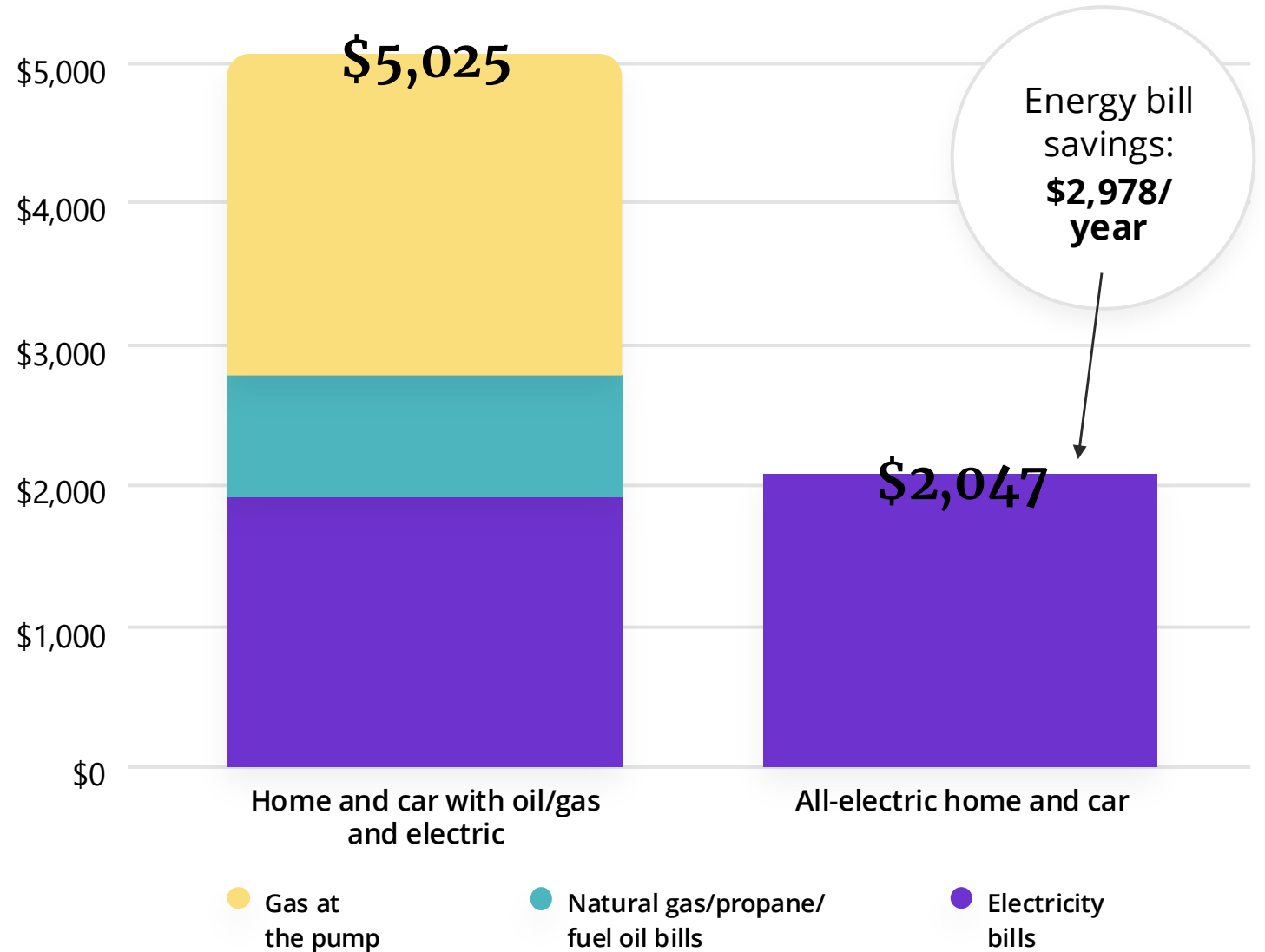
Electric household machines are far more efficient than gas

Comparing the efficiency in converting energy to end use

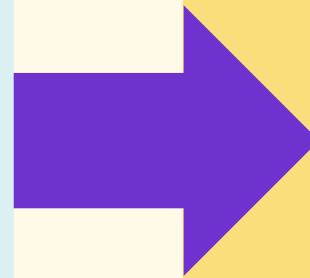


We can flip the affordability and climate story on its head.

Bill savings from household electrification (2025)



Over the next 5 years,
U.S. electricity
demand from data
centers is projected
to grow by 90–200 GW.



50–100%+ of this
can be fulfilled by
home upgrades
nationwide.

HYPERSCALER INVESTMENT

If hyperscalers
paid for

They could get
capacity for

50% of the upfront
cost of electric
resistance to
heat pump upgrades



\$344/kW-year

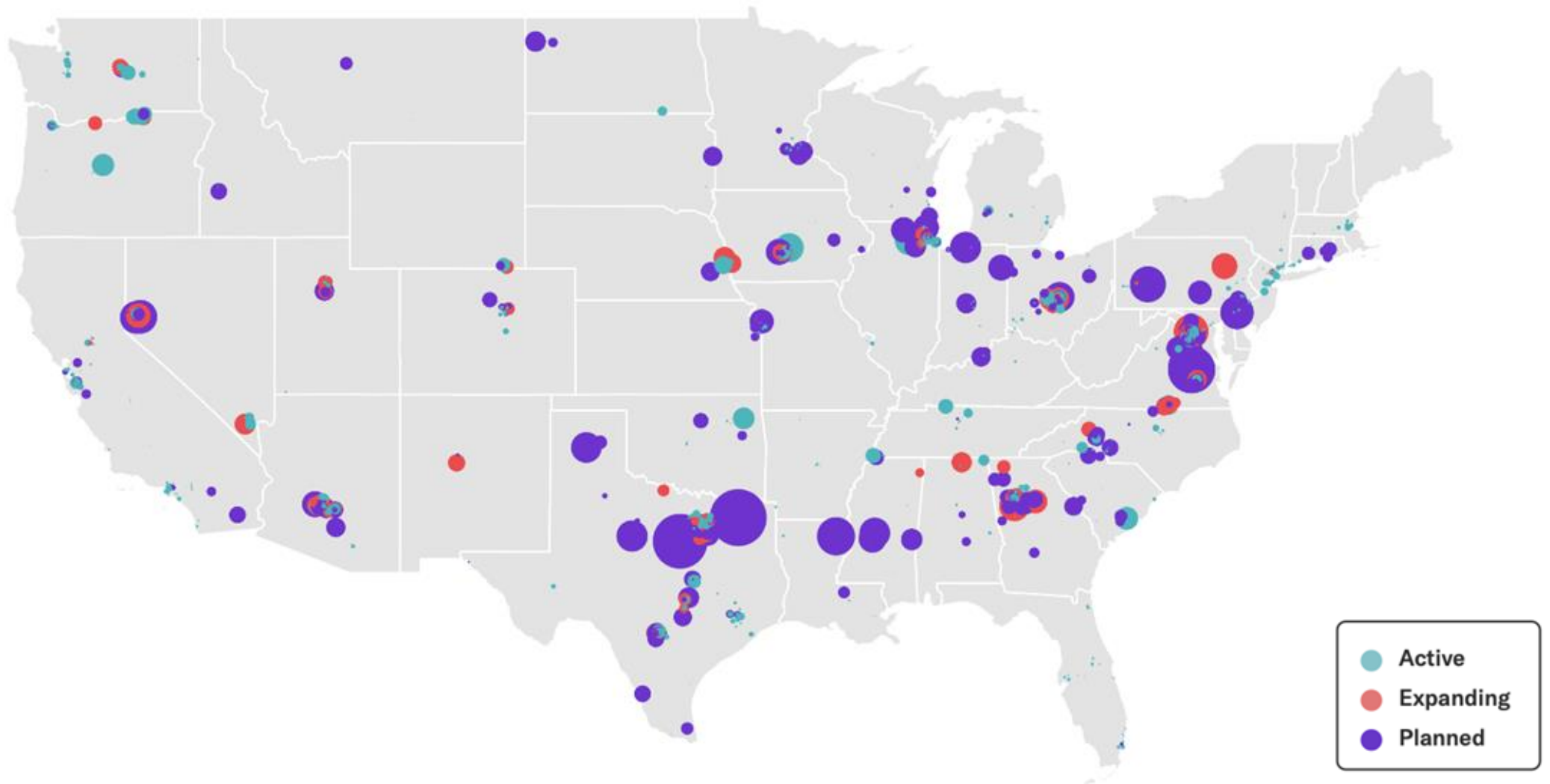
30% of the
upfront cost
of rooftop
solar + storage



\$365/kW-year

A similar cost to building
and operating a new
gas power plant, which
currently costs about
\$315/kW-year.

DATA CENTERS PROJECTED TO BE BUILT THROUGH 2029*

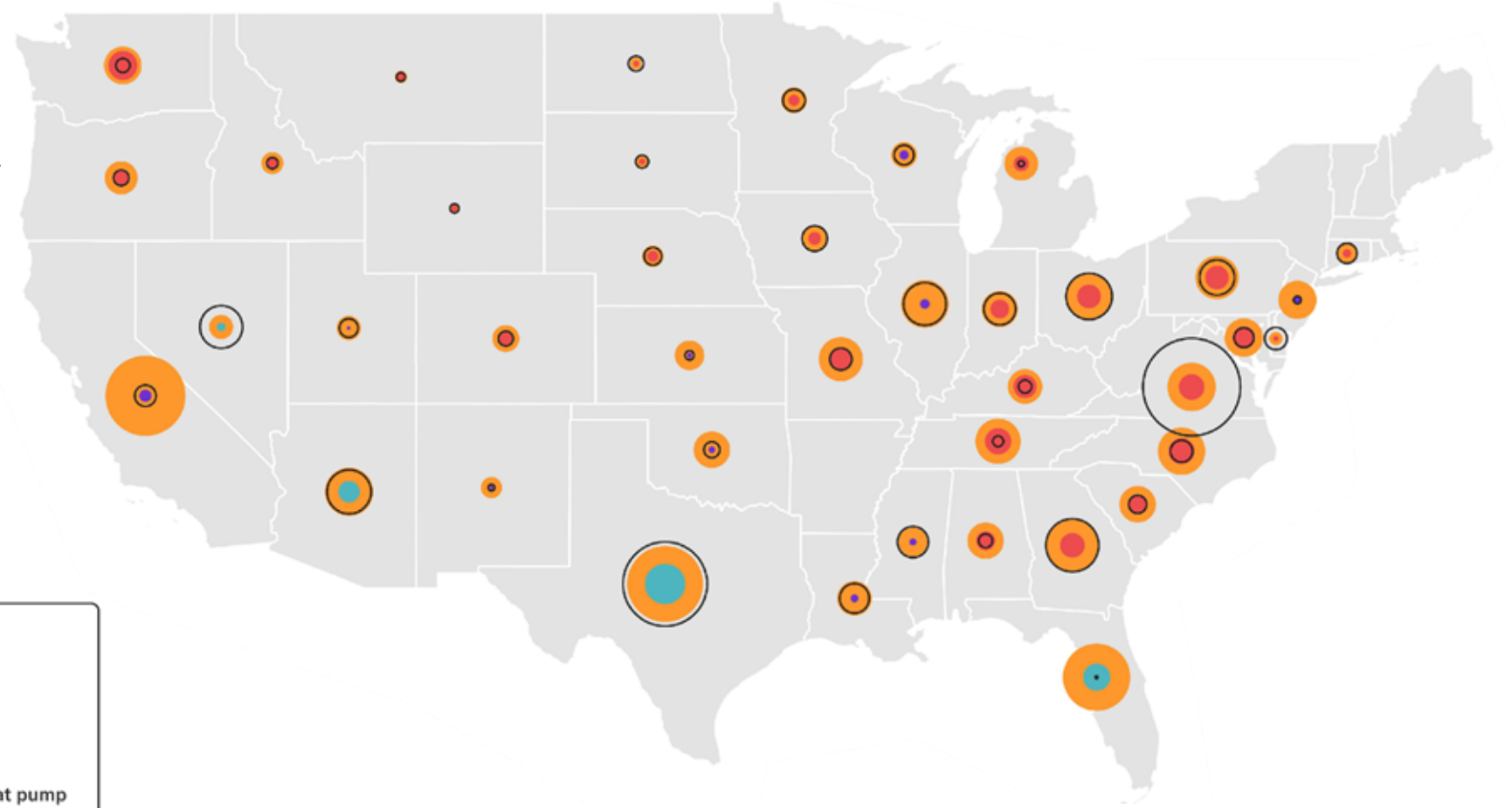


*As of September 2025.

A STRATEGIC OPPORTUNITY

The American household can be the hero of the data center demand growth story.

We just have to make it so.



○ Data center additional capacity needs*

CAPACITY POTENTIAL, BY UPGRADE

- Solar + storage
- Cooling: Central AC to heat pump
- Space heating: Electric resistance to heat pump
- Water heating: Electric resistance to heat pump

*Based on a national projection of 93 GW of new data center demand

Three big policy mechanisms to unlock home energy upgrades:



Improve affordability

Cut red tape, reform rates, enable low-cost financing, and establish durable funding programs.



Treat households as grid assets

Value, prioritize, and set deployment targets for distributed energy resources.



Capture the system value

Incentive data centers to subsidize home upgrades; consolidate infrastructure spending away from gas.



Conservative Energy Network

Mission:
**To Champion Secure,
Reliable, Affordable, Clean American Energy**

GOALS:

- Restore American Energy Leadership
- Save Americans Money
- Build American
- Secure the Power Grid

Underpinning Principles:



- Achieve American Energy Independence
- Embrace Technology & Innovation
- Champion Free Market Competition
- Strengthen Consumer Choice
- Create American Energy Jobs
- Defend Property Rights
- Cut Government Overregulation
- Protect Critical Infrastructure



THE WESTERN WAY

Mountain West

Conservative Energy Forum

Midwest

≡ **CEN** ≡
CONSERVATIVE
ENERGY NETWORK

Southeast


CONSERVATIVES FOR
CleanEnergy

Texas

 **CONSERVATIVE**
TEXANS
FOR ENERGY INNOVATION



Land & Liberty Coalition® Chapters

GETTING STEEL IN THE GROUND



The Land & Liberty Coalition (L&LC), a project of CEN, is a coalition of farmers, ranchers, landowners and stakeholders who combat mis- and dis-information at the county and municipal levels. Focused on education, property rights and local benefits from utility scale projects, L&LC facilitates dialogue and collaboration between clean energy companies and local communities.

L&LC IMPACT SINCE 2019

- 10,700 MW built and operational
- Enough energy to power 8.03M homes for a year

L&LC ACTIVE PROJECTS

- 41,000 MW
- Enough energy to power 30.75M homes for a year



Policy Priorities for 2026



- ▶ **Siting + Permitting Reform and Predictability**
- ▶ **Grid Reliability + Infrastructure Modernization**
- ▶ **Affordability + Ratepayer Protection**
- ▶ **Nuclear and Advanced Energy Enablement**
- ▶ **Candidate and Elected Official Education**

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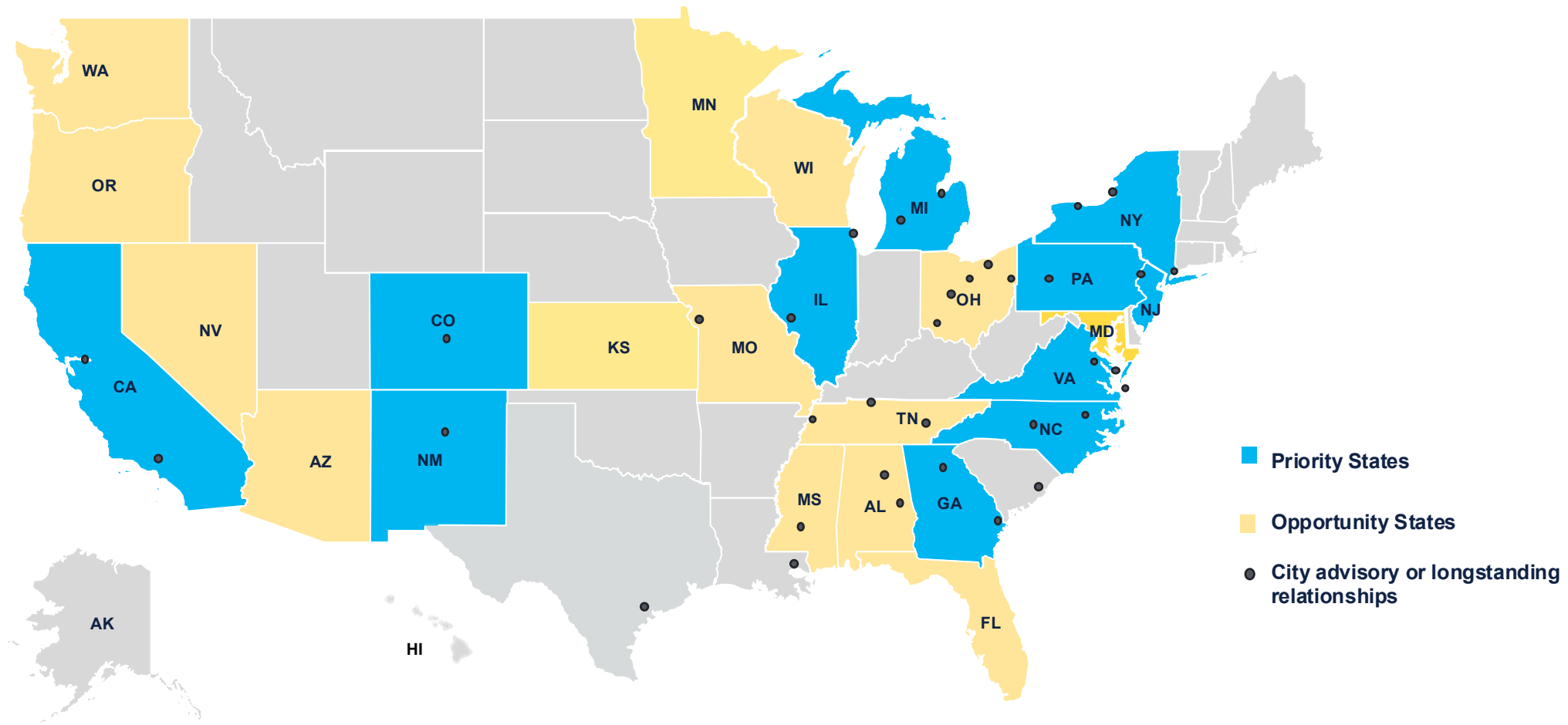


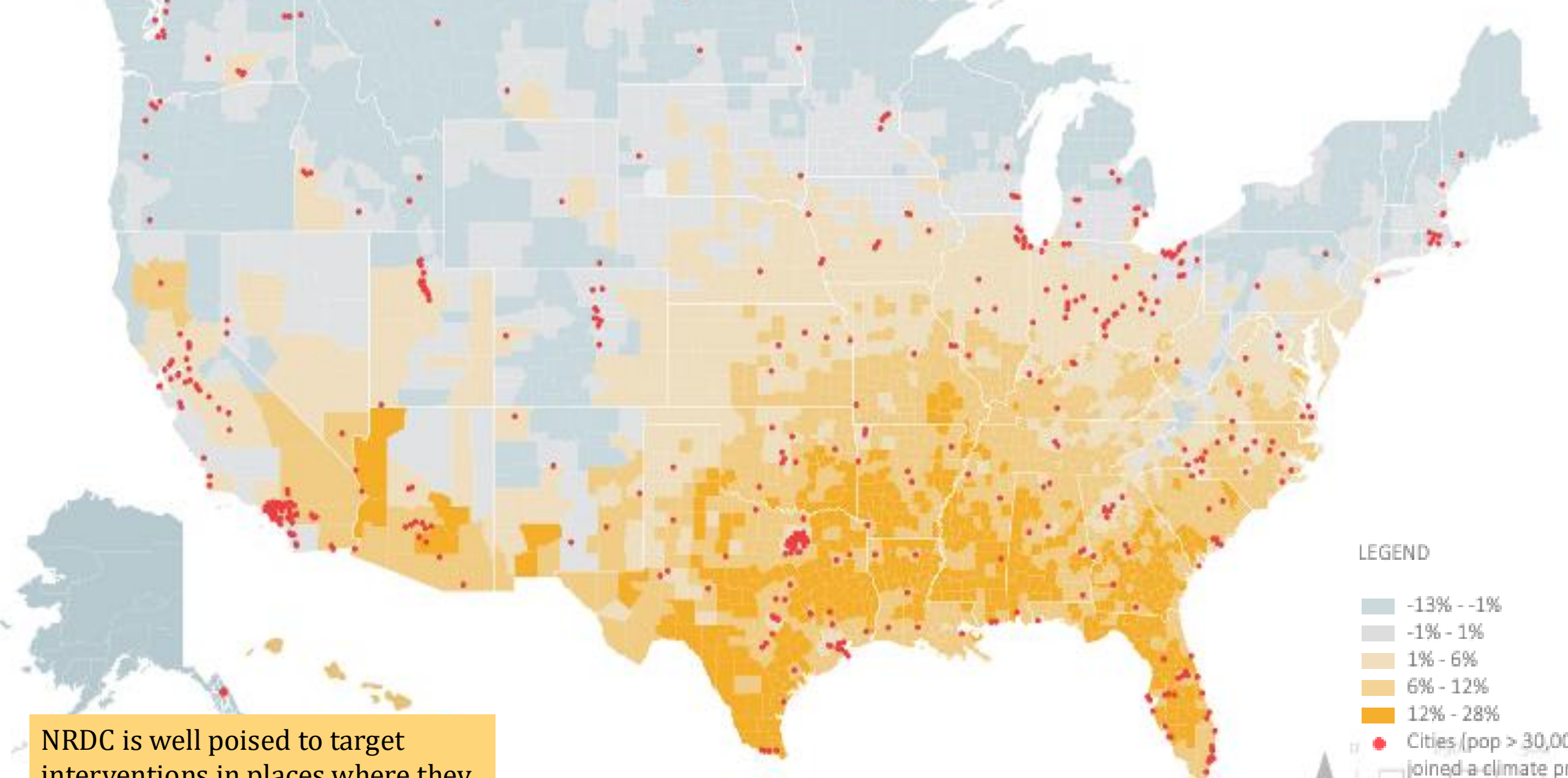
Natural Resources Defense Council

NRDC's State of Play in 2026



NRDC builds deep and lasting relationships in the places we work

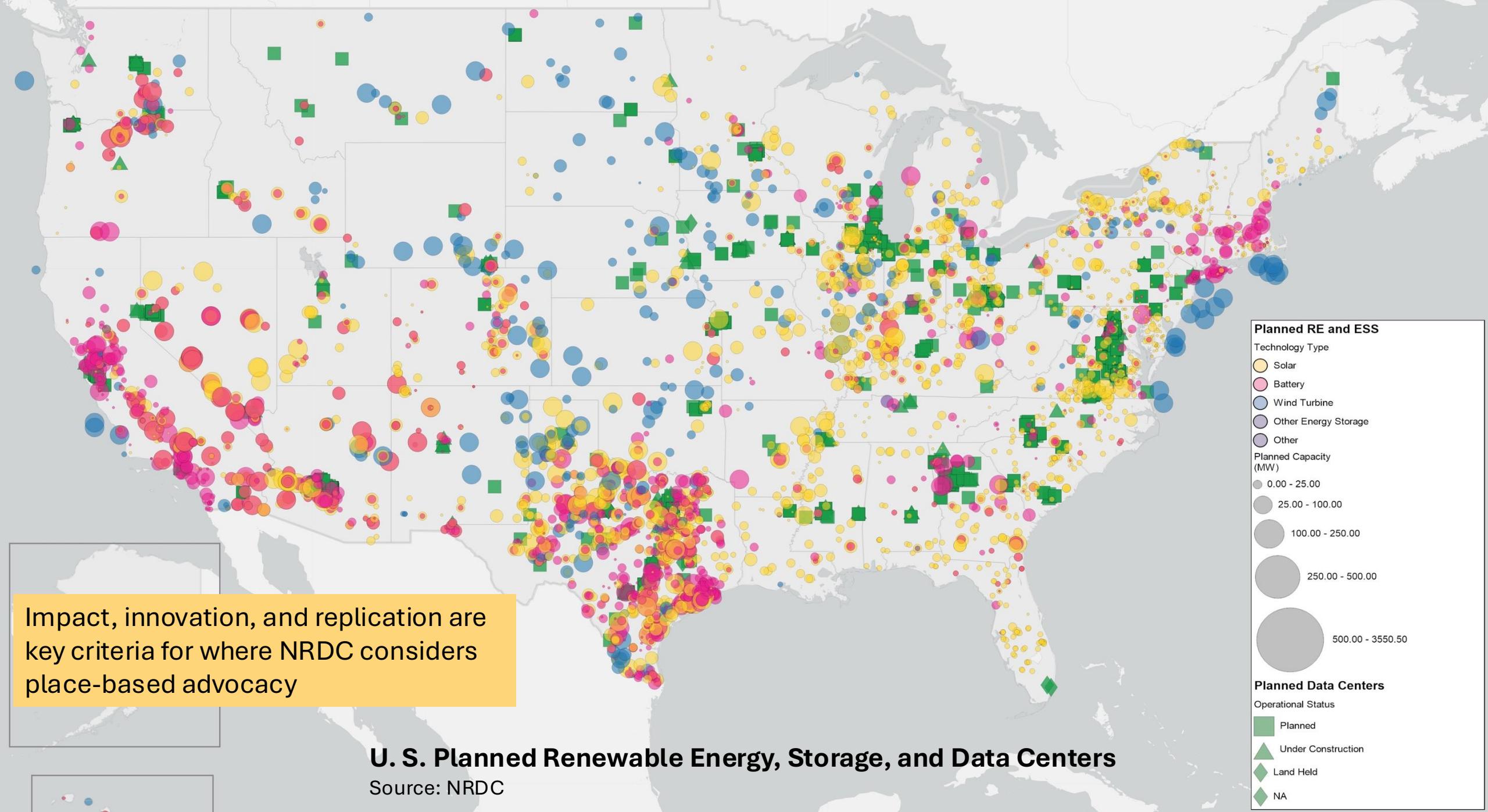




NRDC is well poised to target interventions in places where they can help the greatest number of people

Projected Total Climate Change Damages (% County Income)

Source: CityScale



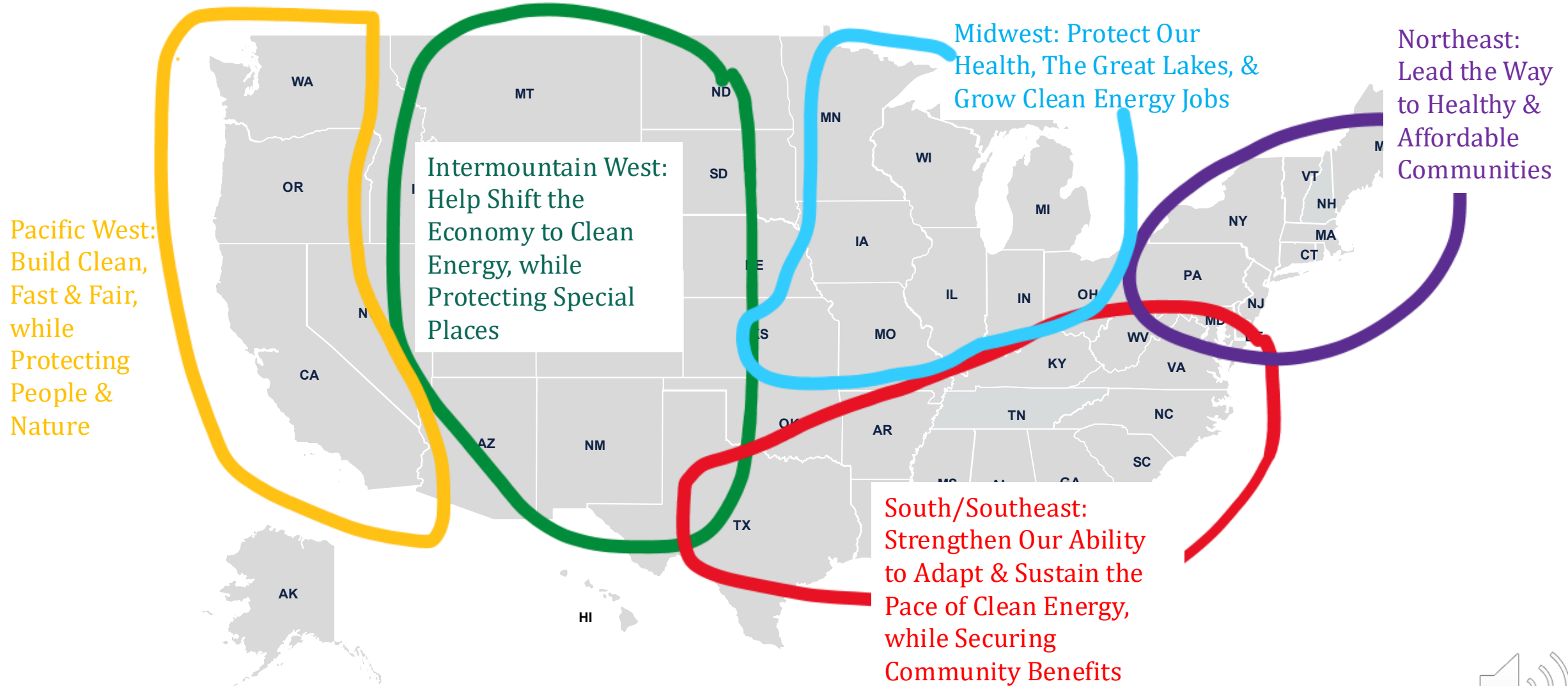
Impact, innovation, and replication are key criteria for where NRDC considers place-based advocacy

U. S. Planned Renewable Energy, Storage, and Data Centers

Source: NRDC

High-Level Program Priorities by Region

Identifying broad themes by geography helps us build a state and regional strategy that responds to local priorities and concerns.



NRDC is building towards durable progress in 2026 and beyond

We can rebuild power in ways that would make progress more politically durable.



Deliver people-centered policies



Broaden support through outcome-driven partnerships



Drive action through the states



Approach accountability with long-term cultivation

Questions?



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Thank You



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