



## **NC ENERGY POLICY TASK FORCE MEETING NOTES**

Tuesday, September 30, 2025 | 11:45 AM - 2:30 AM

Park Alumni Center, NC State University

2450 Alumni Drive, Raleigh, NC 27606 + WebEx

*Co-Chairs: NC Representative Kyle Hall & DEQ Secretary Reid Wilson*

The following Task Force members were present: Secretary Reid Wilson, Rep. Kyle Hall, Rep. Terry Brown, Sen. Julie Mayfield, Asher Spiller, Jennifer Mundt, Chris Ayers, Chris Chung, Mark McIntire, Winnie Wade, Michael Youth, Kathy Moyer, Don Stewart, Markus Wilhelm, Matt Abele, Steve Wall, Tim Profeta, Steve Levitas, Will Scott, Katharine Kollins, David Neal, Rep. Pricey Harrison (online), Dave Rogers (online), Ray Fakhoury (online), Rachel Wilson (online, Amy Murphy attending in-person as delegate on 9/30)

**Facilitators Nick Montoni and Autumn Proudlove convened the meeting and Rep. Kyle Hall welcomed the task force and provided opening remarks.** Rep. Hall acknowledged the level of growth and investment in the state over the past 15 years and the projected electricity load growth in the state. He emphasized that policymakers and the public must protect the grid, keep rates low, and meet demand for electricity.

**Secretary Reid Wilson provided opening remarks.** Sec. Wilson conveyed the importance of strengthening electricity infrastructure and affordability as demand increases. He acknowledged the variety of interests from the Task Force members and highlighted the need to identify creative, innovative solutions to energy demand.

**Governor Josh Stein provided the charge to the Task Force.** Gov. Stein emphasized the need for reliable, affordable, clean energy amidst continued growth as a state and the accelerated demand for electricity. Gov. Stein acknowledged the members of the Task Force and stated that another legislative member would be added shortly. He thanked Task Force staff and members for their service. He charged the Task Force with finding solutions to meet demand in the most affordable, reliable, and safest way possible while advancing on a realistic path to net zero with clean electricity. He stated that meeting rising electricity demand need not be a partisan issue, emphasized working across the aisle with a diverse array of stakeholders, and acknowledged past bipartisan legislation that exemplified being strategic and balanced in crafting energy policy in the state of North Carolina.

**Nick Montoni moved the meeting into the swearing in of Task Force members. Judge Robert Rader led Task Force members through the Task Force's oath and members signed onto the oath.**

**Rep. Hall called the meeting to order and reviewed logistics.** He acknowledged the recent addition of Task Force members Chris Carmody, Dana Magliola, and Pricey Harrison. Facilitators took roll call attendance. Sec. Wilson read the Conflict of Interest Policy aloud to the members. The members did not share any conflicts of interest.

**The Task Force moved into a working lunch with three level-setting presentations on load growth projections and approaches.**

**Dr. Arman Shehabi of Lawrence Berkeley National Labs (LBNL) presented on Data Center load Growth.** He reviewed past load growth projections and how they underestimated current demand. He shared LBNL's projections out to 2028, summarized LBNL's methodology, and emphasized the uncertainty of projecting out more than five years. Finally, he emphasized the importance of understanding the power growth of chips used in data centers and data center location for predicting impacts. Chris Chung asked about how growth LBNL's trajectories compared to the rest of the world, and Dr. Shehabi highlighted how little data is available to assess this question, but conveyed that the U.S. is currently leading in demand growth. Tim Profeta acknowledged the uncertainty of forecasting into the long-term and asked if there were existing best practices. Dr. Shehabi shared that there is little data available on data centers and recommended that the Task Force find ways to collect actual computational data on electricity and water use in the Task Force's jurisdiction. Sen. Julie Mayfield asked for clarification about a data visualization in Dr. Shehabi's presentation.

**Lesley Jantarasami of the Smart Electric Power Alliance (SEPA) presented on Utility Approaches to Assessing Load Growth.** She reviewed U.S. power system load growth drivers in the short, medium, and long-term. She also addressed data centers in context, and stated that their desire for quick interconnection may lead to speculative bids, posing challenges to investing in uncertain load growth and meaning that a more certain approach is to identify areas with headroom to accommodate data centers. Key outstanding questions for utilities include load forecasting, load interconnection, and design of electricity tariffs. Ms. Jantarasami provided examples of how utilities are responding and explained the Database of Emerging Large-Load Tariffs (DELTA) as a resource for understanding questions around large load tariffs. Rep. Terry Brown asked if data centers led to more capacity or if places with available capacity led to more data centers. Ms. Jantarasami explained that data center developers generally don't want to wait for new grid infrastructure to be built to allow for additional capacity and posed a few innovative approaches such as hyperscalers addressing some of the grid costs, co-locating them on a campus, and transitioning capital ownership to the relevant utility. Chris Carmody asked if there were data sets that put data center demand in contrast with manufacturing demand by size. Ms. Jantarasami responded that some limited data was available she would share offline and that it is not just a question of load, but of where data centers and manufacturers want to locate in different service territories, as well as their operating characteristics and opportunities for flexibility in load. Christina Cress asked if utilities are taking a bifurcated approach to resource planning for data centers and general resource planning, and whether this would make sense from a policy perspective. Ms. Jantarasami responded that she wouldn't characterize current planning as bifurcated, that there will be

more data-center specific types of planning as projects move through the interconnection queue, and that it is likely best to keep the processes integrated.

**Todd Olinsky-Paul of the Clean Energy States Alliance (CESA) presented on State Approaches to Addressing Load Growth.** Mr. Olinsky-Paul presented a survey of what states are doing to meet growing demand. He reviewed load growth drivers; load growth trends; and state load growth strategies including supply-side investment, demand side solutions, and transmission investments. He also reviewed new tariff approaches that address limiting ratepayer costs and using clean energy to supply data centers, as well as state legislative approaches to data center load growth. Additionally, he established that the amount of demand flexibility can depend on data center ownership. Large companies that own their data centers might be more willing to shift load, while smaller companies that rent third-party data centers may not be as willing to flex their use during their allotted rental time. Tim Profeta asked for any insight on best practices for load forecasting, and Mr. Olinsky-Paul acknowledged how difficult these forecasts can be, but offered that utilities can attempt to hold companies responsible for a portion of the projected load. Rachel Wilson added that Google had resources and best practices on optimization and clean energy that could be referenced.

**Facilitators Nick Montoni and Autumn Proudlove reviewed the Task Force structure and work plan.** The Task Force is broken into the load growth subcommittee and the technical advisory subcommittee, which members may volunteer to serve on or send delegates to serve on in their place. In the context of the load growth subcommittee, they acknowledged concurrent efforts of Duke's Carbon Plan and Integrated Resource Plan and the North Carolina Utilities Commission Large Load Technical Conference. The load growth subcommittee will be facilitated by North Carolina State University beginning on Thursday October 16th from 3-4:30pm and continuing to meet from 3-4:30pm biweekly until the initial Task Force report is due in February. **Nina Peluso of the Energy Futures Group reviewed the structure of the technical advisory subcommittee,** which will be supported by the Energy Futures Group. Using capacity expansion modeling, the technical advisory subcommittee will aim to create a clearer picture of the factors and assumptions that can determine the state's energy future to feed into the February report. The technical advisory subcommittee will meet October 6th, with future dates to be announced.

**Facilitators Nick Montoni and Autumn Proudlove opened the meeting to discussion and next steps.** They asked the Task Force what goals they had for possible solutions to load growth in North Carolina and what goals should be prioritized. Dana Magnolia emphasized business priorities and stated that reliability needed to be prioritized, with affordability following closely. He stated that all options on the table should be considered, including an "all of the above" energy mix, demand response, and energy efficiency. Steve Levitas expressed that the Task Force should ensure ratepayers are not shouldering the cost of industrial customers. David Neal expressed that the state should most efficiently use the system it has and that using efficiency, demand response, and other existing resources will be key to affordability and reliability. Tim Profeta stated that load flexibility should be employed, that we should use the system we have, and that using the system we have more efficiently without costing ratepayers is bipartisan in spirit. Additionally, he expressed a desire to dig into the medium- and long-term horizon and see what the state needs. Sen. Julie Mayfield added that North Carolina has been a center for clean

energy installation and manufacturing, and that we should look at this as a development opportunity to continue to make those investments. She added that heavy investment in clean energy is the fastest way to meet the short-term load growth that we are seeing. Matt Abele echoed Steve Levitas' contributions around ratepayer affordability. Chris Carmody echoed everything said by other members and added that this was an opportunity for North Carolinians to learn a lot more about the systems and why the costs are what they are, stated that ratepayers should not be penalized for short-term demand from data centers, and expressed that the state should avoid future stranded costs. Jennifer Mundt cited North Carolina's ranking as the best state for business development and stated that efforts should be taken to maintain that competitiveness into the future.

**Task Force members were also asked what types of data would be helpful to develop policy recommendations and what types of speakers it would be helpful for them to learn from.**

Rep. Terry Brown shared that case studies from other states dealing with these issues would be helpful. He added that Georgia and Virginia are facing this issue and are comparable to North Carolina in many ways, so it would be helpful to hear from them. Finally, he added that hearing from both the utility side and the private sector would be helpful. Tim Profeta stated his desire to acquire as Task Force members needed load forecast data and start from a common basis of fact to move the process forward. He highlighted learning into data collection together to determine what is known, then moving to judging policy and market design. Steve Levitas added that gathering substantive technology-specific information was needed, such as the timeline, the cost, and the projected capacity factor for coal, for example. Christina Cress asked what the anticipated usage of the modeling was and whether it was intended for the Task Force to file the modeling at the North Carolina Utilities Commission. Nina Peluso responded that that the Task Force would not be filing the modeling and that the modeling was intended to inform the Task Force. Sen. Julie Mayfield spoke on wanting to hear from Duke about what they are already doing to address this challenge and what they would like to do, especially if there are solutions that they do not currently have the statutory authority for. Chris Chung expressed his desire to hear from end-user businesses that the state is trying to attract in terms of what the state is doing well and where it is falling behind. Dana Magliola supported Mr. Chung's request and stated his desire to hear from the advanced manufacturing community. Katharine Kollins asked about the state's perspective about large loads it is and is not trying to attract, if it was trying to attract hyperscalers, and if so, why? Amy Murphy asked if there was data from economic development, striking the balance between expanding the grid and economic growth, ensuring costs are not passed to consumers, and which businesses the state wanted to come to or grow in North Carolina.

**Finally, Task Force members were asked if they learned anything new.** Tim Profeta highlighted the usefulness of the Database of Emerging Large-Load Tariffs (DELTA), and Mark McIntire commented that this meeting affirmed the idea that this conversation and challenge is happening across the country, not just in North Carolina.

**Rep. Kyle Hall** adjourned the meeting.

*The Governor's Executive Order 23 outlining the Task Force, its subcommittees, its responsibilities, and its deliverables may be accessed [here](#).*