



NC ENERGY POLICY TASK FORCE

Tuesday, December 2, 2025 | 1:00 – 3:30 PM

NC Museum of Natural Sciences, Nature Research Center, 4th Floor

11 West Jones St., Raleigh, NC 27601 + WebEx

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

WELCOME AND INTRODUCTION

1:00 PM – 1:10 PM

Welcome and Opening Remarks

- Secretary Reid Wilson
- Representative Kyle Hall

Call to Order

- Secretary Wilson

Roll Call

- Task Force Staff

Conflict of Interest Statement

- Secretary Wilson

PRESENTATIONS

1:10 PM – 2:10 PM

- Luke Wilson
Chief Policy Officer, Indiana Office of Energy Development

1:10 PM – 1:35 PM

- Commissioner Kelsey Bagot
Virginia State Corporation Commission

1:35 PM – 2:10 PM

TECHNICAL ADVISORY SUBCOMMITTEE UPDATE

2:10 PM – 2:20 PM

- Josh Brooks
Technical Advisory Subcommittee Co-Chair

BREAK

2:20 PM – 2:30 PM

LOAD GROWTH SUBCOMMITTEE UPDATE

2:30 PM – 3:25 PM

- Senator Julie Mayfield & Kathy Moyer
Load Growth Subcommittee Co-Chairs
- Small Group Discussion & Report Out





2:30 PM – 2:40 PM






2:40 PM – 3:25 PM

NEXT STEPS AND ADJOURNMENT



3:25 PM – 3:30 PM



**NORTH CAROLINA ENERGY POLICY TASK FORCE
MEMBER LIST**





MEMBER PHOTO	MEMBER NAME	TITLE	ORGANIZATION
	Sec. Reid Wilson	Sec. of NC Department of Environmental Quality	State of North Carolina
		Co-Chair	North Carolina Energy Policy Task Force
	Rep. Kyle Hall	Representative, NC-91 (R)	North Carolina General Assembly
		Co-Chair	North Carolina Energy Policy Task Force
	Rep. Terry M. Brown	Representative, NC-92 (D)	North Carolina General Assembly
	Rep. Allen Chesser	Representative NC-25 (R)	North Carolina General Assembly




	Rep. Pricey Harrison	Representative, NC-61 (D)	North Carolina General Assembly
	Sen. Michael Lazzara	Senator, NC-6 (R)	North Carolina General Assembly
	Sen. Julie Mayfield	Senator, NC-49 (D)	North Carolina General Assembly
	Matt Abele	Executive Director	North Carolina Sustainable Energy Association
	Chris Ayers	Executive Director	North Carolina Utilities Commission Public Staff

	Chris Carmody	Executive Director	Carolinas Clean Energy Business Association
	Chris Chung	CEO	Economic Development Partnership of NC
	Christina Cress	Attorney	Ward and Smith, P.A.
	Ray Fakhoury	Energy Policy Manager	Amazon Web Services
	Katharine Kollins	President	Southeastern Wind Coalition

	Steve Levitas	Energy Policy Consultant	Independent Consultant
	Dana Magliola	Sr. Dir. Of Infrastructure Competitiveness	NC Chamber Foundation
	Mark McIntire	Energy & Environmental Policy & Affairs Director	Duke Energy
	Kathy Moyer	COO	ElectriCities of NC, Inc.
	Jennifer Mundt	Assistant Secretary for Energy & Infrastructure	NC Department of Commerce

	David Neal	Senior Attorney	Southern Environmental Law Center
	Tim Profeta	Senior Fellow	Nicholas Institute for Energy, Environment & Sustainability, Duke University
	Dave Rogers	Deputy Director, Beyond Coal	Sierra Club
	Will Scott	Southeast Climate & Clean Energy Director	Environmental Defense Fund

	<p>Asher Spiller</p>	<p>Senior Deputy Attorney General, Environmental Division</p>	<p>NC Department of Justice</p>
	<p>Don Stewart</p>	<p>President</p>	<p>Toyota Battery Manufacturing, NC</p>
	<p>Winnie Wade</p>	<p>External Affairs Manager</p>	<p>Dominion Energy</p>
	<p>Steve Wall</p>	<p>Senior Research Advisor</p>	<p>North Carolina Collaboratory</p>

	Markus Wilhelm	Founder & CEO	Strata Clean Energy
	Rachel Wilson	Southeast Energy Market Lead	Google
	Michael Youth	VP, Deputy General Counsel	NC Electric Cooperatives

NC ENERGY POLICY TASK FORCE CORE STAFF MEMBERS			
STAFF NAME	TITLE	ORGANIZATION	EMAIL
Autumn Proudlove (FACILITATOR)	Managing Director - Policy & Markets	NC Clean Energy Technology Center	afproudl@ncsu.edu
Nick Montoni (FACILITATOR)	Senior Program Director	NC Clean Energy Technology Center	npmonton@ncsu.edu
Jonathan Moch	Senior Climate and Energy Advisor	NC Office of the Governor	jonathan.moch@nc.gov
Erica Nuñez	Special Assistant to the Secretary	NC Department of Environmental Quality	erica.nunez@deq.nc.gov
Frank Muraca	Energy Workforce Advisor	NC Department of Commerce	frank.muraca@commerce.nc.gov

Technical Advisory Subcommittee Update

The Technical Advisory Subcommittee has met four times since September 30, 2025. Subcommittee work has focused on (1) aligning on subcommittee goals and analytical approaches and (2) advising on a near-term modeling exercise, which includes collaborative development of technical assumptions and consensus-building on modeled scenarios.

The near-term modeling exercise aims to answer three key questions, critical to informing the Governor's Office and the public on energy challenges facing the state and providing technical information to the Task Force as it prepared its report. These key questions are:

- Is there a reasonable resource scenario available to maintain system reliability and meet the state's policy goals?
- What are key assumptions that determine overall costs, future risks, and uncertainties for the NC electricity system?
- Are utilities appropriately forecasting future load, and if assumptions that forecast are changed, how would the required resource mix change?

The modeling exercise will have the following deliverables, informed by ongoing engagement with the Technical Advisory Subcommittee:

- Base Case Modeling, an electric systems scenario which will remain fixed
- Scenario & Sensitivity Modeling: 7-8 scenario or sensitivity runs, based on subcommittee surveys and discussions, to answer specific questions of interest
- Final Report: a public-facing report that consists of a high-level overview inclusive of key findings and a detailed modeling appendix

The subcommittee discussed a range of possible scenarios and sensitivities and voted on which ones to explore in more detail. The scenarios that the subcommittee has prioritized thus far are:

- **Gas Price Forecast**, a sensitivity that assesses the cost and operational impacts of maintaining Duke Energy's base portfolio in a future where gas prices are higher than anticipated
- **Path to Net Zero**, which models an alternate future where carbon emissions steadily decline through 2050 and policy support for zero-emission technologies is maintained
- **Alternative Large Load**, which considers large loads projections not actually fully built out by limiting data center load to just what has been submitted for interconnection requests

The subcommittee also expressed support for two sensitivities: the **Flexible Large Load** scenario, which models data center load as a fixed “dispatchable” demand-side resource to approximate ability to provide flexible demand and the **Large Load Clean Energy Commitments** scenario, where new data center load would be met with some substantial proportion of zero-carbon resources, as well as a combined scenario encompassing both

The subcommittee has also prioritized and discussed a number of single-variable sensitivities:

- **No or Delayed Hydrogen Deployment**
- **Bad Creek II**, which is a pumped storage facility powered by a hydroelectric dam, coming online
- **Thermal Fleet Pathways**, which models coal staying online longer in the near-term, with the potential to shift needed gas builds

Lastly, the subcommittee has discussed prioritizing different cost assumption sensitivities in addition to the gas price forecast assessment described above:

- **High Nuclear Capital Costs** redispatch sensitivity or portfolio optimization, where high nuclear costs could either be applied to Duke Energy’s existing portfolio or a high nuclear cost could be input for a reoptimized portfolio.
- **High Gas Capital Costs** sensitivity, which would use higher-than-expected costs for new thermal resources
- **Policy Shift**, where the cost of zero-carbon resources is lower than currently forecast, to serve as a proxy for a variety of policies that could influence future costs

The Technical Advisory Subcommittee is continuing to solicit input from its members to determine the specific modeling parameters and scenarios run. Preliminary modeling outputs are expected in January.

Load Growth Subcommittee Update

Since the first convening of the Energy Policy Task Force in September 2025, the Load Growth Subcommittee has met three times and will meet a fourth time before the second full Task Force meeting.

The subcommittee has heard presentations from a wide range of speakers:

- Utilities, discussing load growth forecasting and the major drivers of load growth:
 - Duke Energy, presenting that they only include economic development projects and large loads in their forecasting process when those projects have met various milestones, such as signing agreements with the utility
 - Dominion Energy, explaining lessons learned from Virginia, which has the largest data center market in the world, including that the utility forecasts data center needs separate from ratepayer base and other industrial needs
 - ElectriCities of NC, educating Members on the structure and concerns of municipal utilities and showing that metropolitan growth as well as large load interconnection requests are drivers of load growth
 - NC Electric Cooperatives, explaining their load forecasting process and showing that uncertainty in large loads materializing creates uncertainty in the forecasting process
- NC Economic Development Partnership, discussing economic development opportunities for large customers in NC and how they track and analyze requests for power from large customers
- Duke University's ALIGN Initiative, discussing the DOE Advanced Notice of Proposed Rulemaking (ANOPR) concerning interconnection for large loads onto interstate electricity infrastructure. The ANOPR proposes ways to accelerate interconnection for large load, and the expert from ALIGN explained the ways this might impact state policy and authority.
- Large Load Customers:
 - Google, discussing their site selection process and what makes a state attractive for establishing a data center; key factors are procurement and availability of carbon-free energy, infrastructure availability, and market receptiveness
 - AWS explained their efforts to create efficient and sustainable data center campuses and their efforts to procure carbon-free energy to meet the energy demands of data centers; the presenters also discussed their efforts to create load flexibility programs in partnership with utilities and local governments
 - Toyota (planned for the fifth meeting)

Subcommittee members have engaged in robust discussion and analysis of approaches to addressing load growth, including through breakout sessions and virtual whiteboarding. Discussions have focused on exploring approaches, categorizing those approaches, and linking those approaches to distinct policy goals in North Carolina. The subcommittee has categorized solutions as follows:

- Cost allocation and reduction (e.g., large load tariffs): policy levers that minimize or eliminate cross-subsidization and ensure that generation or transmission costs for new large loads aren't disproportionately distributed to the rest of the ratepayer base
- On-site energy (e.g., co-location, load flexibility): policy levers that allow new large loads to "bring their own energy" either on-site or procured from an independent producer; programs that allow large loads to adaptively manage power use to reduce peak demand
- Grid capacity (e.g., interconnection, green tariffs): approaches that make better use of existing resources through expediting processes, improving and enhancing existing infrastructure, and aggregating resources to provide grid services
- Planning and data access (e.g., tracking interconnection requests): systems that improve transparency and data sharing to allow utilities, governments, customers, and the public to make informed decisions about where to develop new large loads and how to support their energy needs

The subcommittee's policy goals identified thus far are as follows:

- Affordability: policy approaches for load growth should avoid passing on increased costs to consumers and should prioritize overall cost reductions where feasible
- Reliability: as electricity demand increases, approaches should focus on ensuring that all customers continue to receive power without disruptions
- Sustainability (of resources beyond electricity/energy): new industries and growing populations will need additional resources like water and land; policy approaches should ensure that common resources are protected for all North Carolinians
- Economic Development: policy approaches to load growth should make and keep North Carolina an attractive place for businesses to invest and create jobs
- Emissions Reductions: policy approaches should look at ways to reduce pollution as much as possible and need to adhere to North Carolina's statutory 2050 carbon emissions goal.
- Opportunities for Innovation (technological, policy, and market): responses to load growth should consider demonstration and deployment of new energy

technologies, new market structures for valuing energy resources, and new policies that are scalable and replicable and demonstrate NC leadership

Finally, the subcommittee has convened a report writing working group and has begun drafting an outline and proposed structure for the major sections of the report.



State of North Carolina

JOSH STEIN
GOVERNOR

August 26, 2025

EXECUTIVE ORDER NO. 23

ESTABLISHING THE NORTH CAROLINA ENERGY POLICY TASK FORCE

WHEREAS, Article XIV, Section 5 of the North Carolina Constitution establishes that it is the policy of the state to conserve and protect its lands and waters for the benefit of all its people, that it is a proper function of the state to control and limit the pollution of our air and water, and that in every other appropriate way the state should preserve as a part of the common heritage of this state its forests, wetlands, estuaries, beaches, historical sites, open lands, and places of beauty; and

WHEREAS, in 2021, the General Assembly enacted Session Law 2021-165, "Energy Solutions for North Carolina;" and

WHEREAS, this bipartisan legislation directs the North Carolina Utilities Commission to ensure electric public utilities achieve carbon neutrality by 2050; and

WHEREAS, according to the 2024 North Carolina Greenhouse Gas Inventory, statewide net greenhouse gas emissions in 2020 were nearly 40% below 2005 levels; and

WHEREAS, on October 29, 2018, Governor Roy Cooper issued Executive Order No. 80, which called for North Carolina to transition to a clean energy economy and reduce greenhouse gas emissions and continues to guide state policy; and

WHEREAS, on June 9, 2021, Governor Roy Cooper issued Executive Order No. 218, which set goals for the development of offshore wind energy resources and laid a path for North Carolina's economic and clean energy future with offshore wind; and

WHEREAS, on January 7, 2022, Governor Roy Cooper issued Executive Order No. 246, which further advanced and continues to guide North Carolina's progress towards a clean energy economy; and

WHEREAS, in 2022, 2023, and 2024, Governor Roy Cooper issued Executive Order Nos. 266, 271, 292, and 305, which additionally advanced progress on addressing and responding to climate change; and

WHEREAS, North Carolina has emerged as a hub for the clean energy technology economy, with more than \$24 billion in investment since the second quarter of 2022, and more than 100,000 people now employed in the clean energy technology sector; and

WHEREAS, North Carolina, with its skilled workforce, top business climate, top research universities, excellent community college system, and enviable quality of life, is well-positioned to realize continued economic development success in clean energy technology; and

WHEREAS, to ensure continued economic development success, North Carolina must maintain an adequate, reliable, clean, and affordable electricity supply; and

WHEREAS, the emergence of artificial intelligence and the associated need to power data centers, increased loads from manufacturing and other heavy industry, growing population, and new sources of electricity demand have prompted new questions about how the state should maintain an adequate, reliable, affordable, and clean electricity supply; and

WHEREAS, the costs to power these new loads should not unfairly increase rates for ratepayers or leave North Carolinians responsible for the costs of stranded assets; and

WHEREAS, for the years 2017 through 2023, nearly two-thirds of the rise in electricity rates for most residential customers in North Carolina was due to increases in fuel costs; and

WHEREAS, deployment of additional clean energy and storage resources can reduce fuel costs, reduce the exposure of ratepayers to fuel price volatility, and save money for North Carolina ratepayers; and

WHEREAS, the 2020 North Carolina Climate Science Report found that the adverse impacts of climate change in North Carolina threaten human health, the state's economy, and our quality of life, including through more intense storms and flooding, dangerously high temperatures, droughts, rising sea levels and beach erosion, and harms to ecosystems and wildlife; and

WHEREAS, the 2020 North Carolina Climate Science Report further found that greenhouse gas emissions have caused climate change and that North Carolina's climate will experience significant changes if greenhouse gas concentrations continue to rise; and

WHEREAS, North Carolina has already experienced significant adverse impacts from climate change, including Hurricane Helene, for which the latest science has found that climate change made the massive cumulative amounts of rainfall associated with the storm's catastrophic damages approximately 70% more likely to occur; and

WHEREAS, pursuant to Article III of the North Carolina Constitution and N.C. Gen. Stat. §§ 143A-4 and 143B-4, the Governor is the chief executive officer of the state and is responsible for formulating and administering the policies of the executive branch of state government; and

WHEREAS, pursuant to N.C. Gen. Stat. § 147-12, the Governor has the authority and the duty to supervise the official conduct of all executive and ministerial officers.

NOW, THEREFORE, pursuant to the authority vested in the undersigned as Governor by the Constitution and the laws of the State of North Carolina, **IT IS ORDERED**:

Section 1. Establishment and Purpose.

The North Carolina Energy Policy Task Force ("Task Force") is hereby established. The mission of the Task Force is to advise the Governor, the General Assembly, and other state policymakers and to develop recommendations for how to manage increasing electricity demand while maintaining adequate reliable, affordable, and clean electricity for North Carolina. The Task Force may advise and develop recommendations on other topics that arise during the conduct of its work that address current and future energy needs and goals or that promote economic development for North Carolina and the state's clean energy economy.

Section 2. Membership.

The Task Force shall include no more than thirty (30) members. All members shall be appointed by the Governor and shall serve at the Governor's pleasure. Task Force members shall serve a term of two (2) years and may be appointed to successive terms. Vacancies shall be filled by the Governor and members appointed to fill vacancies shall serve for the remainder of the unexpired term. The Governor shall appoint the chair or co-chairs from among the members of the Task Force. To the extent practicable, members should represent the geographic, economic, and

demographic diversity of North Carolina and include a range of relevant stakeholders and subject matter experts.

The Task Force members shall include, but not be limited to, representatives from the following:

- a. North Carolina Department of Environmental Quality
- b. North Carolina Department of Commerce
- c. North Carolina Office of the Attorney General
- d. North Carolina General Assembly
- e. North Carolina Utilities Commission
- f. North Carolina Utilities Commission Public Staff
- g. Economic Development Partnership of North Carolina
- h. North Carolina Electric Utilities, Public Power Providers, and Electric Cooperatives
- i. Energy Companies and Independent Power Producers
- j. Large Load Data Center Electricity Customers
- k. Large Load Industrial Electricity Customers
- l. Advocates for North Carolina Electricity Ratepayers
- m. Non-Governmental and Non-Profit Organizations
- n. North Carolina Public and Private Colleges and Universities

Section 3. Duties.

The Task Force shall:

- a. Recommend policies to manage increasing electricity demand while maintaining affordability, reliability, and carbon emissions reductions.
- b. Develop additional recommendations based on the work of each subcommittee, as appropriate.
- c. Provide advice and recommendations on any other matter the Governor refers to the Task Force.

The Task Force shall consult with knowledgeable experts in the conduct of its work, as appropriate.

Section 4. Subcommittees.

To fulfill its Duties, the Task Force shall establish the following subcommittees:

- a. Load Growth Subcommittee, to focus on, as appropriate:
 1. Developing estimates of near term and longer-term load growth forecasts under varying economic outlook scenarios.
 2. Assessing the implications of load growth and new large loads, including as related to existing resource capacity and reliability constraints, new resource needs, and transmission and distribution requirements.
 3. Identifying technological and policy solutions, including load flexibility and demand response strategies, to address the growing energy needs of data centers and heavy industry.
 4. Evaluating strategies for avoiding stranded assets while meeting growing electricity demand.
 5. Identifying recommendations for minimizing residential rate increases and maintaining affordability while managing rising electricity demand.
- b. Technical Advisory Subcommittee, to focus on, as appropriate:
 1. Advising the Office of the Governor on any commissioned modeling of North Carolina's electricity system.
 2. Developing testable hypotheses and questions that can inform state energy policy.
 3. Increasing transparency and public understanding of models used to inform energy policy, including their inputs and outputs, risks, and uncertainties.
 4. Providing quantitative and qualitative assessment results and supporting information to other subcommittees.

The chair(s) shall appoint individuals to subcommittees and designate a chair for each subcommittee. The Task Force may establish additional subcommittees and modify the work of existing subcommittees as necessary to carry out the Task Force's purpose and duties.

Section 5. Meetings and Deliverables.

The Task Force shall meet quarterly and at the call of the chair(s) or the Governor. A simple majority of the Task Force members shall constitute a quorum to transact business.

Subcommittees shall convene at a regular frequency, to be determined by the subcommittee chair upon the advice of its members, and at the call of the subcommittee chair. A simple majority of the subcommittee members shall constitute a quorum for the subcommittee to transact business.

The Task Force's meetings shall be governed by the North Carolina Open Meetings Laws, N.C. Gen. Stat. § 143-318.9, *et seq.*

The Task Force shall submit an annual report on or before February 15 describing Task Force activities, findings, and recommendations to the Governor, the General Assembly, the North Carolina Utilities Commission, the North Carolina Rural Electrification Authority, and the public.

Section 6. Administration.

The Task Force shall serve without compensation but may receive per diem allowance and reimbursement for travel and subsistence expenses in accordance with state law and Office of State Budget and Management policies and regulations.

The Task Force shall be staffed by the Office of the Governor and executive branch agencies, as appropriate.

Section 7. Effective Date.

This Executive Order is effective immediately and shall remain in effect until December 31, 2028, pursuant to N.C. Gen. Stat. § 147-16.2, or until repealed, replaced, or rescinded by another applicable Executive Order.

IN WITNESS WHEREOF, I have hereunto signed my name and affixed the Great Seal of the State of North Carolina at the Capital in the City of Raleigh, this 26th day of August in the year of our Lord two thousand and twenty-five.


Josh Stein
Governor

ATTEST:


Elaine F. Marshall
Secretary of State





Conflict of Interest Policy

In accordance with the State Government Ethics Act, it is the duty of every Taskforce member to avoid both conflicts of interest and the appearance of conflicts of interest.

If any member has any known conflict of interest or is aware of facts that might create the appearance of such conflict with respect to any matters coming before the Taskforce today, please identify the conflict or facts that might create the appearance of conflict to ensure that any inappropriate participation in that matter be avoided.

If at any time, any new matter raises a conflict during the meeting, please be sure to identify it at that time.



Public Records Policy

N.C. GEN. STAT. §132-1(b): "Public records and public information compiled by the agencies of North Carolina Government or its subdivisions are the property of the people."

Providing access to government records in accordance with state law is an important part of the everyday duties of office holders, government employees, and appointed and elected members of government boards and commissions, including task forces.

The Public Records Act defines public records broadly:

- Public records are any type of document "made or received pursuant to law or ordinance in connection with the transaction of public business by any agency of North Carolina government or its subdivisions."
- Records created or received in the transaction of public business by cabinet agencies, their appointed leadership, employees, commissions and committee members, or contractors are covered by the Act.
- Records related to public business that are created or transmitted through non-governmental accounts may nevertheless be public records.
 - Thus, public business conducted using text messages from a task force Member's personal mobile phone or emails from a personal email account may be public records.