NC ENERGY POLICY TASK FORCE

Thursday, July 9, 2026 | 1:00 – 3:30 PM

McKimmon Center, North Carolina State University

1101 Gorman St., Raleigh, NC 27606 + WebEx

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

WebEx Link Forthcoming

wifi: ncsu-guest | password: (none needed)

Time	Topic	Speakers
1:00 p.m. – 1:05 p.m.	**Call to Order, Greetings, and Conflict of Interest Statement**	Secretary Reid Wilson, Co-Chair Representative Kyle Hall, Co-Chair
1:05 p.m. – 1:30 p.m.	**Presentation:** *State Consumer Advocate Concerns with Large Load Growth*	Nina Suetake, Deputy Director of Policy, NASUCA
1:30 p.m. – 1:55 p.m.	**Presentation:** *Toyota Overview for the NC Energy Policy Task Force*	Darius Weatherford, Senior Engineering Manager, Toyota
1:55 p.m. – 2:20 p.m.	**Presentation:** *Initial Assessment Plan: North Carolina Data Center Water Resource Analysis*	Professors Jordan Kern and Benjamin Rachunok, NCSU
2:20 p.m. – 2:40 p.m.	**Working Group Updates: Large Load Tariffs, Bring Your Own Capacity, Load Flexibility**	Mark McIntire, Duke Energy Josh Brooks, NCSEA (additional presenters TBD)
2:40 p.m. – 2:50 p.m.	**Break**	
2:50 p.m. – 3:10 p.m.	**Working Group Updates: Interconnection Reform, Advanced Transmission and Grid Enhancing Technologies, and Energy Efficiency**	Gary Sullivan, Duke Energy Sammy Roberts, Duke Energy Josh Brooks, NCSEA (additional presenters TBD)
3:10 p.m. – 3:25 p.m.	**Open Discussion of Working Group Progress**	
3:25 p.m.	**Adjournment**	

Research Summary for July 9, 2026 Task Force Meeting

Large Load Tariffs

Large load tariffs establish rate structures and cost-recovery rules specifically for high-demand customers, often with the stated goal of not shifting infrastructure and service costs onto other ratepayers. As of June 2026, the Database of Emerging Large Load Tariffs (DELTa) tracks 103 tariffs and service rules across 90 utilities in 37 states, with roughly two-thirds approved and the rest pending; roughly 61 carry a minimum load threshold of 20 MW or more. A growing number of states, including Florida, Maryland, Minnesota, Missouri, and Oregon, have enacted legislation directly requiring large load tariffs, while others (Alabama, Idaho) require cost-shifting protections without mandating a specific tariff. In North Carolina, S.B. 730 would set minimum requirements for electric service agreements with large data centers, including cost-protection terms, minimum billing, and confidentiality provisions subject to NCUC Public Staff review. So far, the working group has identified a spectrum of policy options ranging from legislative or regulatory tariff mandates to utility-led proposals or taking no action, along with design levers such as minimum demand, contract term, load ramp-up periods, minimum bills, and exit fees. Open follow-up items include benchmarking Pennsylvania's stakeholder process, clarifying how large load tariffs interact with Bring Your Own Capacity (BYOC) arrangements, and gathering more customer (hyperscaler and manufacturing) perspectives.

Bring Your Own Capacity (BYOC)

BYOC frameworks allow customers to fund new generation, storage, or demand-side capacity that serves their own load, covering the associated costs directly, while the utility retains oversight and integrates the resource into system planning. The working group catalogued several implemented examples: Entergy Louisiana's agreement with Meta under the state's "Lightning Initiative" (new gas generation, batteries, and transmission funded through a 20-year electric service agreement); We Energies' Bespoke Resource Tariff in Wisconsin, which lets very large customers (100 MW+) subscribe to and pay for dedicated resources; Dominion Energy's Clean Firm Generation approach in Virginia; and Georgia Power's Customer-Identified Resource program, which lets commercial and industrial customers propose resources for utility procurement. A recent Maryland bill (H.B. 1532) ties incentives to the amount of clean capacity a customer brings. The group identified recurring design elements: ratepayer protection, voluntary participation, minimum commitment terms, performance-based standards, additionality, data transparency, curtailment coordination, and continued NCUC oversight. The working group noted unresolved questions about whether demand-side and behind-the-meter resources (efficiency, demand response, virtual power plants, DERs, on-site power or backup) should count as capacity, how costs and benefits should be tracked, and how BYOC should interact with other working groups' recommendations, particularly large load tariffs and interconnection reform.

Load Flexibility

Load flexibility explores mechanisms for making large loads interruptible, curtailable, or otherwise create flexibility in demand so utilities can manage grid constraints without over-building infrastructure. Working group members asked for clear definitions of covered load types, applicable customer classes, and curtailable capacity, plus examples of wholesale curtailment agreements and a review of other states' approaches. There are several policy levers: interruptible service

tariffs, which are common among large investor-owned utilities; large load tariffs with built-in flexibility provisions, such as in Arizona, Arkansas, Colorado, or South Dakota; voluntary demand response or curtailment incentive programs, like those in New York and Washington; flexibility terms embedded in bilateral electric service agreements, such as in Indiana; legislative flexibility mandates including those put forward in Nebraska and Texas; and flexible interconnection options that trade faster grid connection for curtailability, like in California, Maryland, and PG&E's Flex Connect program. The working group also looked at a range of tariffs with different minimum load capacities and different interruptibility provisions. Recent legislation, like Nebraska's L.B. 1010, Maryland's H.B. 1532, and Texas's S.B. 6, increasingly directs utilities or grid operators to build out demand response and curtailment infrastructure for large loads. Key design considerations and open questions include whether flexibility is mandatory or voluntary, how load size and equipment requirements are set, what incentive structures apply, and whether behind-the-meter backup resources count toward flexibility credit.

Grid-Enhancing and Advanced Transmission Technologies (GETs/ATTs)

This working group is largely focusing on technological considerations: dynamic line ratings, advanced power flow control, topology optimization, high-performance/advanced conductors, superconductors, and storage-as-transmission. These interventions can expand existing grid capacity without building new infrastructure. In initial conversations, the working group discussed dynamic line ratings as promising but data- and cybersecurity-sensitive, noted that batteries have shown weak cost-effectiveness for transmission-specific uses, and flagged AI as an emerging tool for transmission planning. North Carolina currently has no mandates or incentives specific to ATTs/GETs; Duke Energy has a DOE-supported reconductoring project on the Lee-Milburnie line and NCUC-approved dynamic line rating prototypes (Docket E-2 Sub 1403) running through 2026 at a combined cost of about $3 million. Nationally, pilots have shown measurable value — an Advanced Power Flow Control deployment in upstate New York freed 185 MW of capacity, and an AEP Ohio reconductoring project doubled capacity on 240 miles of line. Barriers to adoption include unfamiliarity with technical details, misaligned incentives or difficulty compensating utilities for efficiency gains, and difficulty quantifying costs and benefits relative to reliability-focused planning. States have responded with studies, IRP planning requirements, incentives, and pilot programs; examples include South Carolina's and Utah's mandates to evaluate ATTs/GETs in transmission planning, Illinois's S.B. 25, and Virginia's H.B. 429 and S.B. 267. Follow-up requests include a plain-language explainer of high priority ATTs and GETs, noting applications, costs, and other design considerations; comparisons of IOU versus cooperative perspectives; and further review of state legislative mandates.

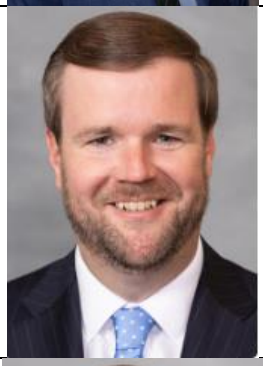
Interconnection Reform

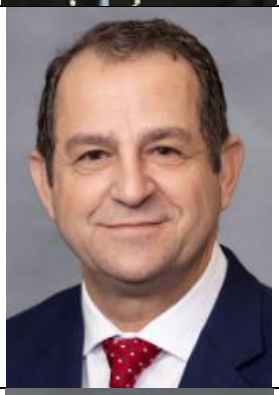
The working group looked at various mechanisms for modernizing the process by which large loads and generators connect to the grid. Initially, the group pointed to Virginia's interconnection process as a strong model because of its transparency, clear cost visibility, financial assurances, and strict deadlines. The group outlined four broad, model policy paths: retain current policy, adopt the Virginia model, adopt the Virginia model with customer energy choice (such as a Clean Transition Tariff-style approach that Duke Energy has agreed to hear a Google-backed proposal on as part of its merger settlement), or adopt Colorado's cost-sharing approach, where customers front upgrade costs and are credited back over time. Other design options include flexible "connect and manage" interconnection used in Texas and the Southwest Power Pool, combined load-and-generation

studies, dedicated large load queues, and review streamlining. A major recent development is FERC's June 18, 2026 show-cause order under Section 206, directing all six regional grid operators to justify or reform tariffs covering large load interconnection, cost allocation, co-location, and flexible load service. The research compiles extensive state and utility examples of interconnection cost and study-fee structures (e.g., Colorado's Xcel Energy pro rata cost-sharing, AEP Ohio's tiered load study fees, and multiple pending large-load tariffs), and some working group members note that NC has reportedly seen hyperscalers redirect projects to Georgia, Texas, and South Carolina, though this remains an open research question. Open items include reconciling co-location and flexible or non-firm load arrangements with existing reliability policy, and aligning this work with the BYOC discussion.

Energy Efficiency

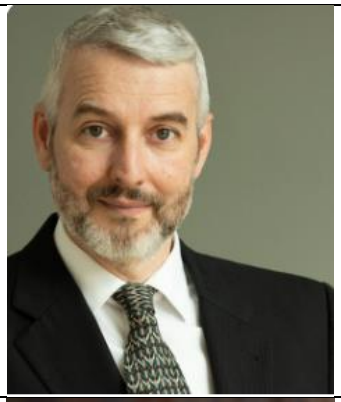
The Energy Efficiency working group examined whether and how large load customers can fund or enable efficiency programs for other ratepayers, and whether efficiency can count as "capacity" under a BYOC framework. Examples of large-customer-funded programs include Google's partnerships with Roanoke Electric Cooperative and Blue Ridge Energy on weatherization and low-income efficiency upgrades in North Carolina, and Meta's $140 million commitment to low-income efficiency and weatherization programs under its Louisiana Entergy agreement. Several states now tie large load fees directly to efficiency funding: Maryland's H.B. 1532 directs part of a per-MW registration fee to its EmPOWER low-income program, Minnesota imposes tiered fees on data centers for conservation and weatherization funds, and Oregon's Schedule 96 funds non-cost-effective efficiency and home repairs through a per-kWh surcharge on large projects. On the BYOC side, the Alliance to Save Energy's proposed "Bring Your Own Distributed Capacity" model and Google/NV Energy's Large Load Customer Offsite Demand Management concept in Nevada illustrate how customer capital could fund utility-directed demand-side management with independently verified, accredited capacity value in exchange for commercial benefits like expedited capacity access. The working group has identified open questions about how North Carolina statutes and Duke Energy's current planning practice define and account for efficiency, cost-effectiveness tests, financing tools, and locational demand-side management. Other research directions include how cooperative wholesale contracts interact with efficiency-driven load reduction, how to accredit efficiency and demand-side management as firm capacity, and what mechanism would best enable this policy option.

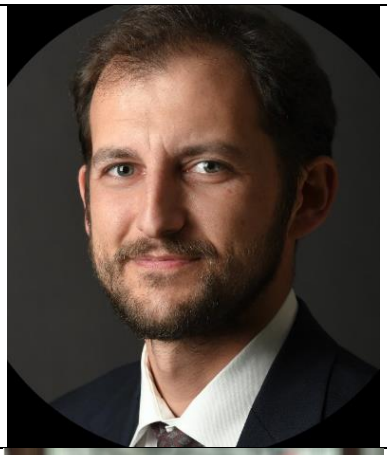
NORTH CAROLINA ENERGY POLICY TASK FORCE MEMBER LIST			
MEMBER PHOTO	**MEMBER NAME**	**TITLE**	**ORGANIZATION**
	Sec. Reid Wilson	Sec. of NC Department of Environmental Quality	State of North Carolina
		Co-Chair	North Carolina Energy Policy Task Force
	Rep. Kyle Hall	Representative, NC-91 (R)	North Carolina 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
	Peter Ledford for 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	Electric Utilities Director	Town of Apex
	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

	Asher Spiller	Senior Deputy Attorney General, Environmental Division	NC Department of Justice
	Don Stewart	President	Toyota Battery Manufacturing, NC
	Winnie Wade	External Affairs Manager	Dominion Energy
	Steve Wall	Senior Research Advisor	North Carolina Collaboratory
	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
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Frank Muraca	Energy Workforce Advisor	NC Department of Commerce	frank.muraca@commerce.nc.gov

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

WHERAS, 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.