

REINHOLD ENVIRONMENTAL[®]



2026 Reinhold/PCUG Round Table Presentation

Hosted by TVA, Southern Company and Vistra
in the Sonesta Nashville Airport Hotel, Nashville, TN
on June 22-23, 2026

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Environmental and Regulatory Challenges



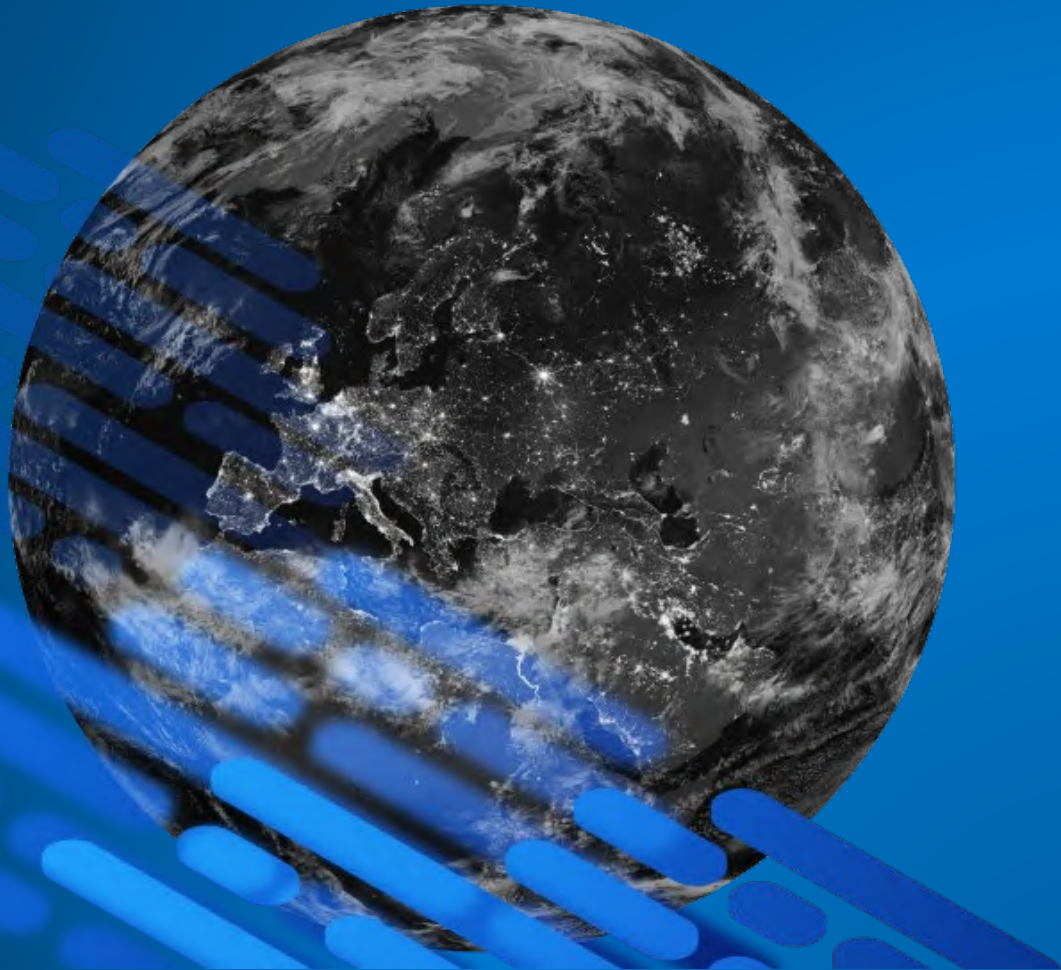
Mike Caravaggio

Vice President Energy Supply Reliability

June 2026



Agenda



- A little on EPRI
- A look at US Electricity Energy Supply
 - Capacity
 - Generation
- Recent EPA Reg Activity
 - Lots and lots of changes in 2025 and 2026
- Executive Orders
- Discussion

EPRI

Leading Collaborative Energy R&D Around the World

EPRI advances energy technologies and informs decision-making through ~\$450M in collaborative annual research involving more than 450 entities in 45 countries - spanning the generation, delivery, and use of energy.



ENGAGING

- Utilities
- Academia
- OEMs
- Regulators



LISTENING

- Financial Community
- Policy Makers
- Consumer Advocates
- Media

www.EPRI.com

The Future of Energy

Decarbonization

Accelerate economy-wide, low-carbon solutions

- Electric sector decarbonization
- Transmission and grid flexibility: storage, demand, EVs
- Efficient electrification

Achieve a net-zero clean energy system

- Ubiquitous clean electricity: renewables, advanced nuclear, CCUS
- Negative-emission technologies
- Low-carbon resources: hydrogen and related, low-carbon fuels, biofuels, and biogas



Transformation

Drive affordability of a clean and resilient energy system through digital transformation

- Power system modernization: pervasive sensors, monitoring, advanced analytics using AI
- Upgraded and expanded communications infrastructure and control systems

Resilience

Mitigate climate impacts and cyber/physical risks

- System and asset hardening
- Improved response
- Faster recovery
- Cybersecurity

Future proof energy system design basis

- Resilient power system design
- Advanced asset design and strategic undergrounding
- Smart integration of energy carriers

Making Energy More

Clean

Affordable

Reliable

~10-15 years

~15-30 years

~10-15 years

~15-30 years

The Future of Energy

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Clean

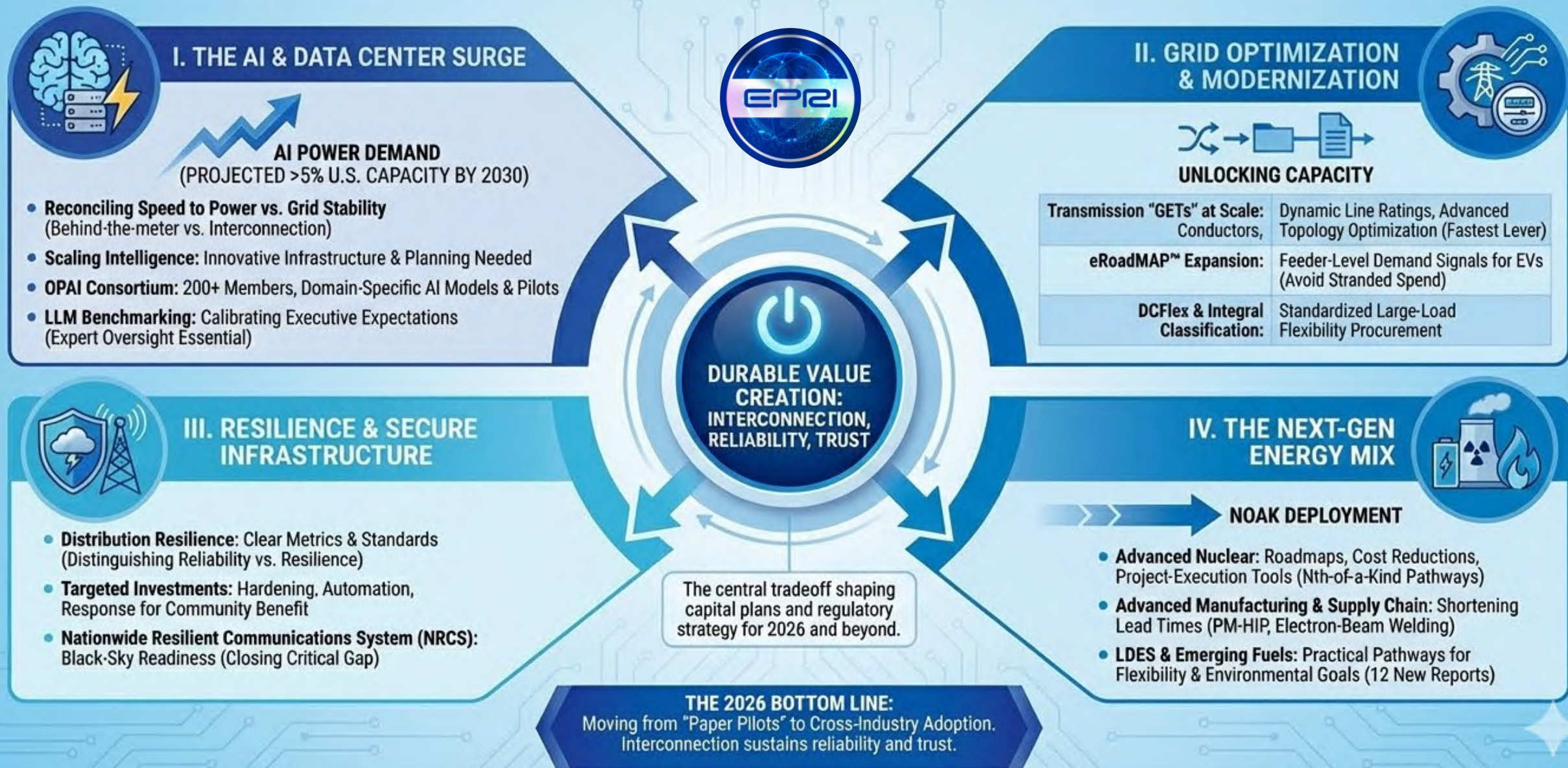
~10-15 years

~15-30 years

~10-15 years

~15-30 years

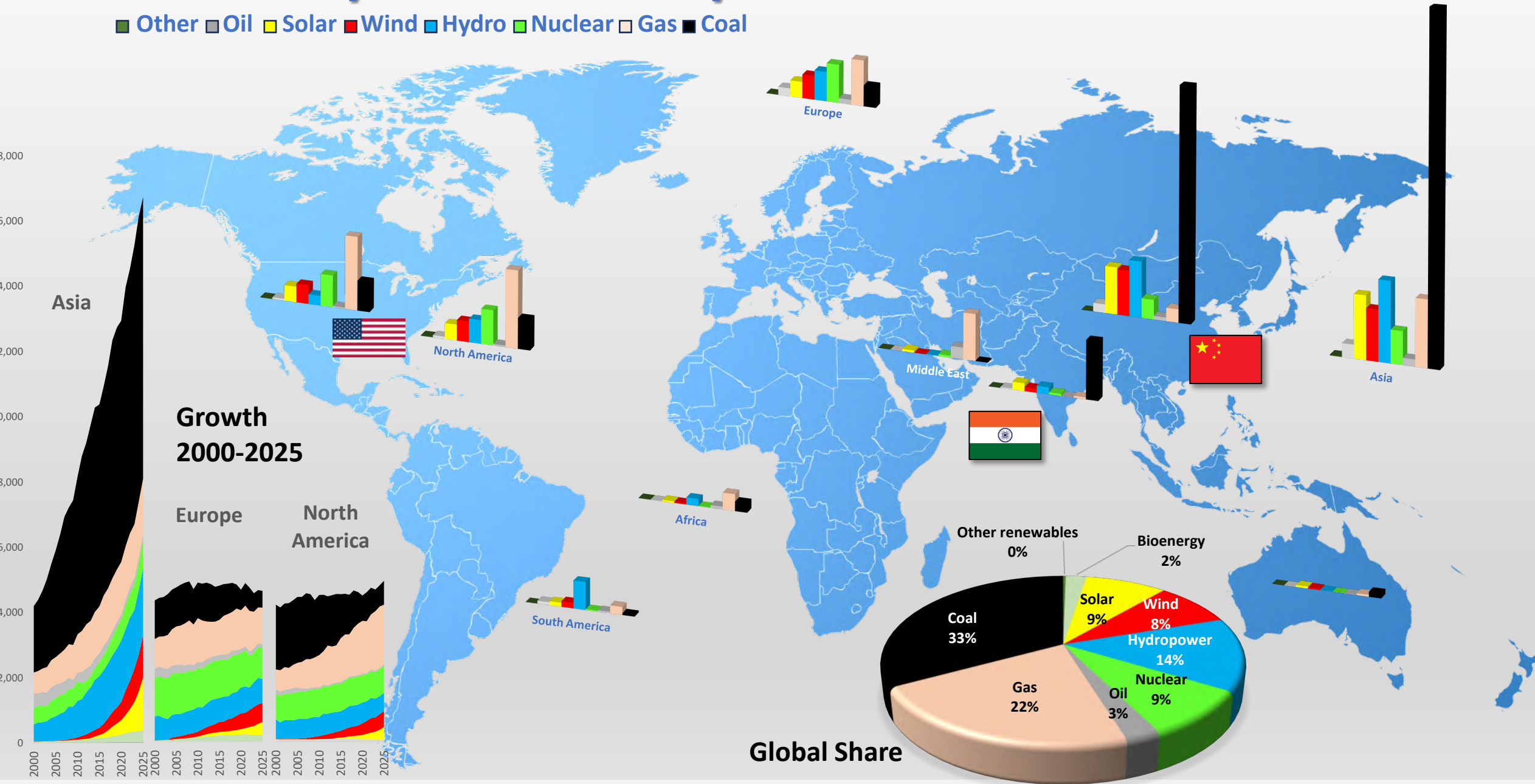
BALANCING AI GROWTH & GRID RESILIENCE



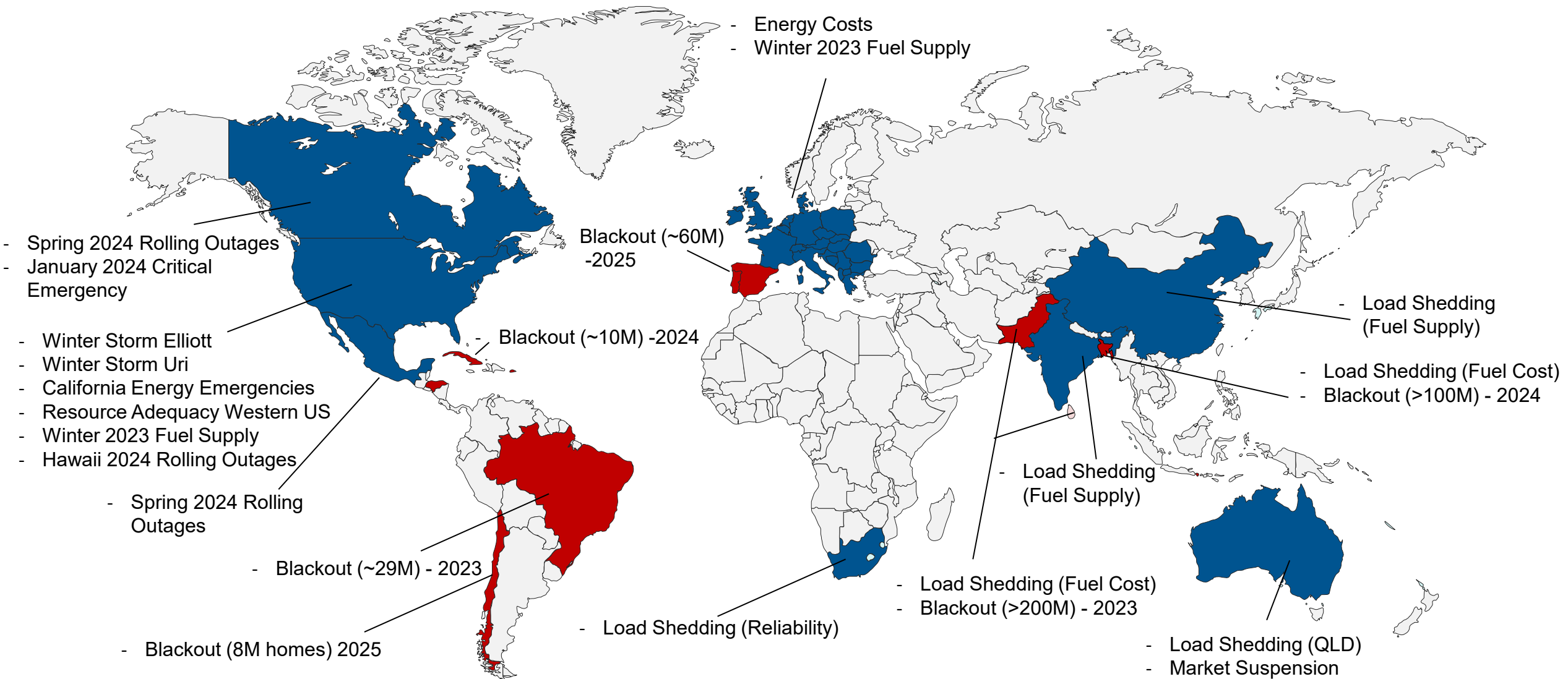


US Generation and Capacity

2025 Electricity Production by Source



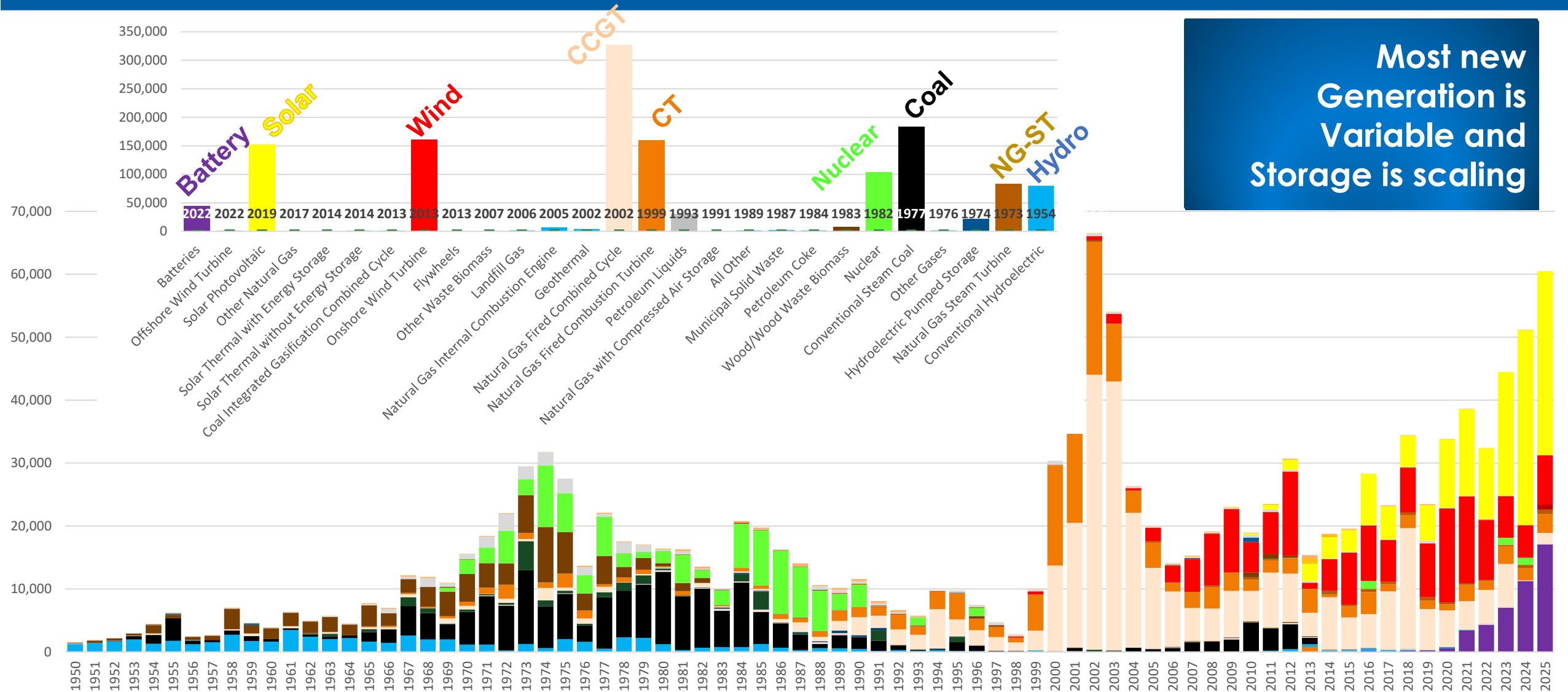
Global Challenges through the Energy Transition



US Capacity Detail

Few New Dispatchable Aging

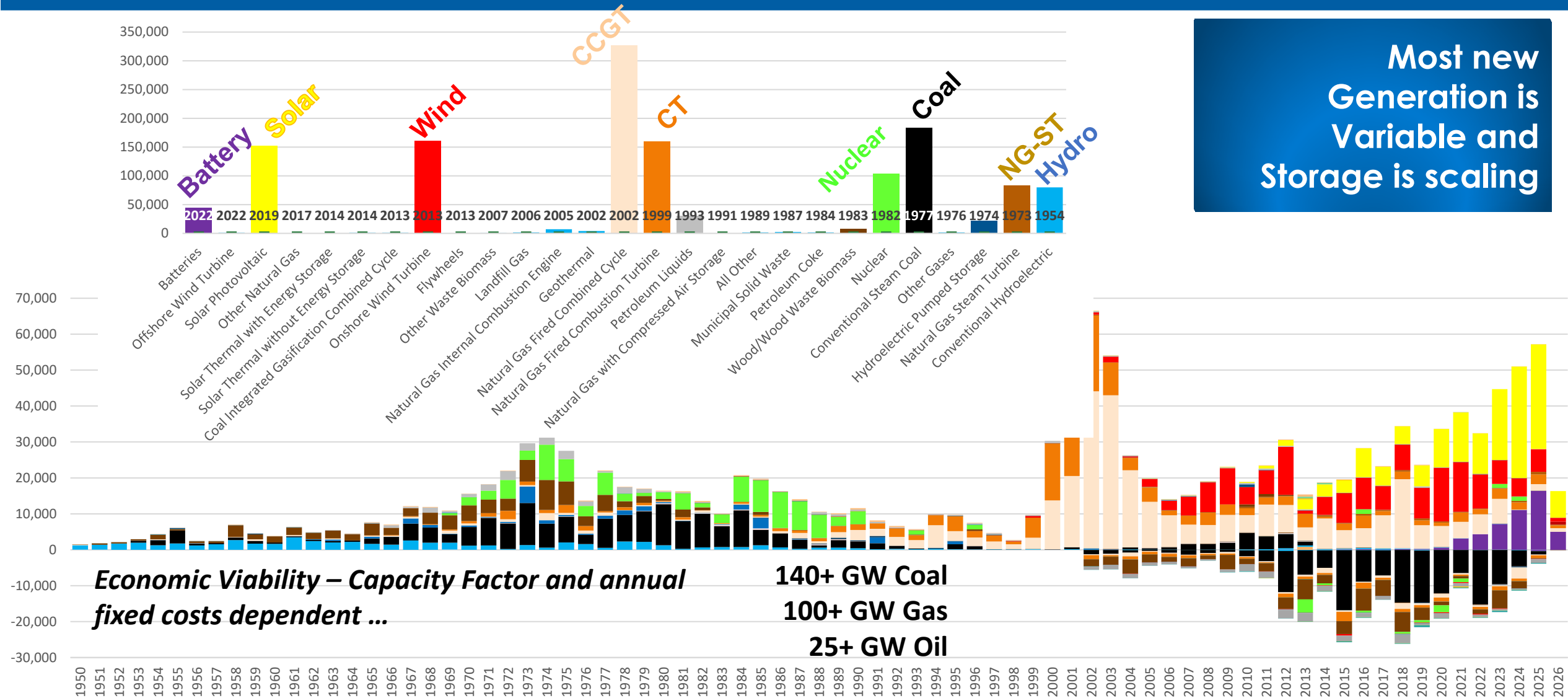
Most new
Generation is
Variable and
Storage is scaling



US Capacity Detail

Few New Dispatchable
Aging

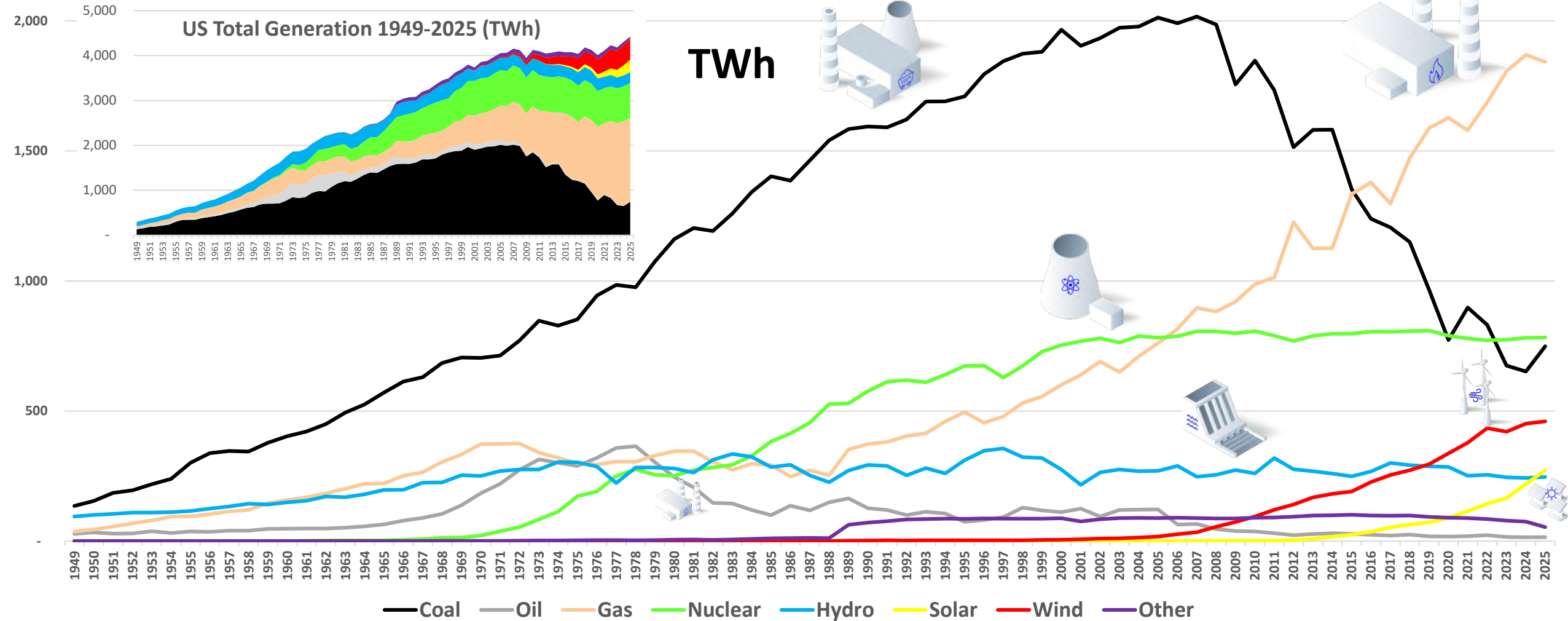
Most new
Generation is
Variable and
Storage is scaling



US Electricity Generation last 70+ years ...



Electricity Evolution



Coal rebound in 2025, Solar surpasses Hydro

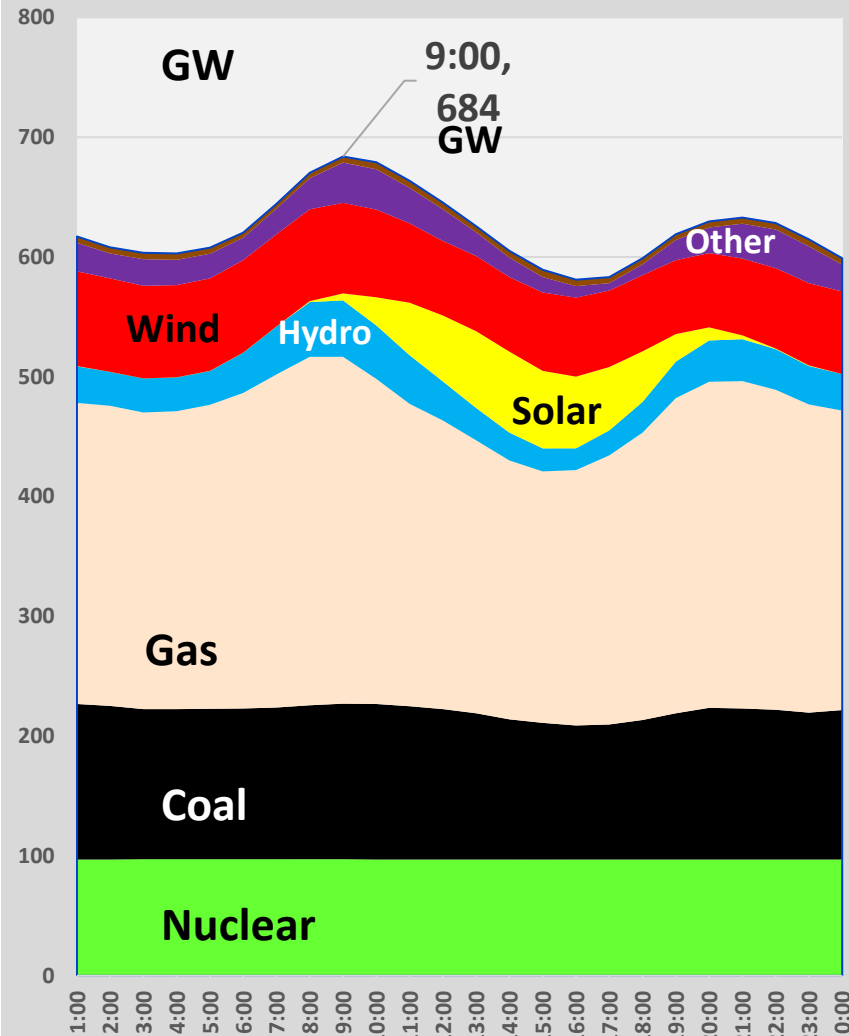
US48 Seasonal Peaks

Winter and Summer (Peak Hourly Days)

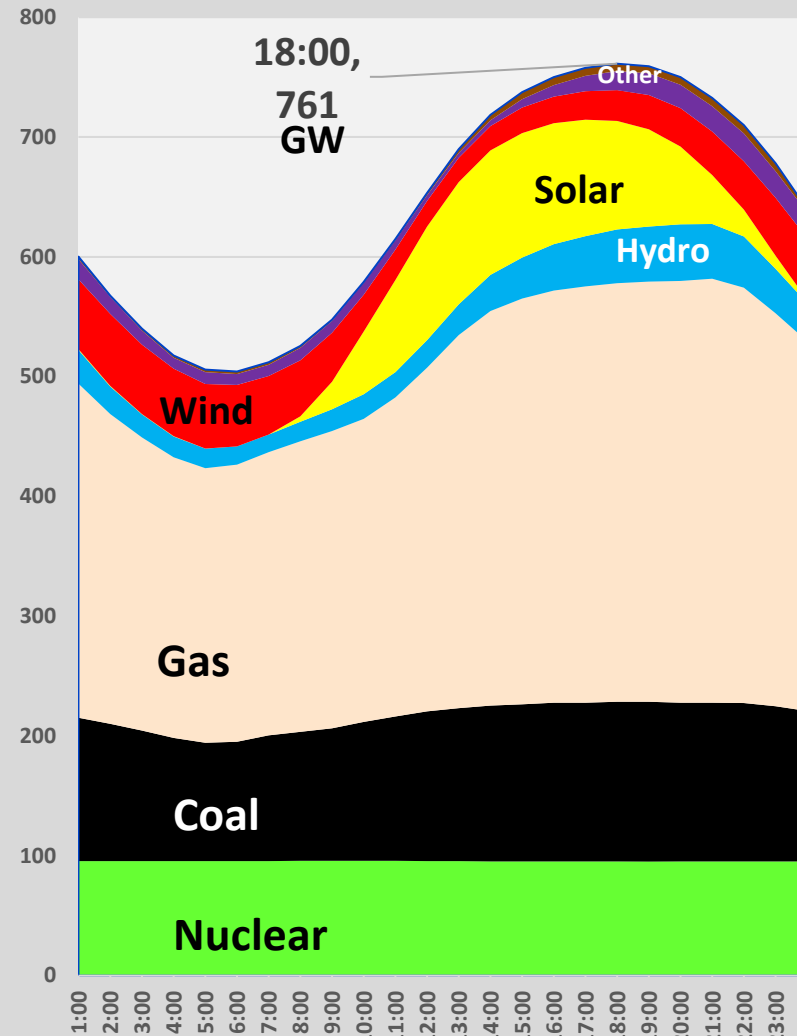
Different Resources

Peak Hour and Daily Energy vs Installed

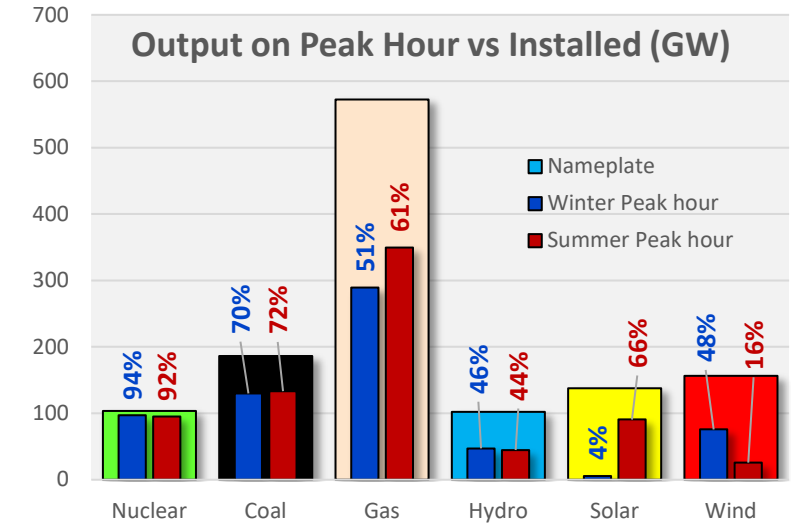
January 22, 2025



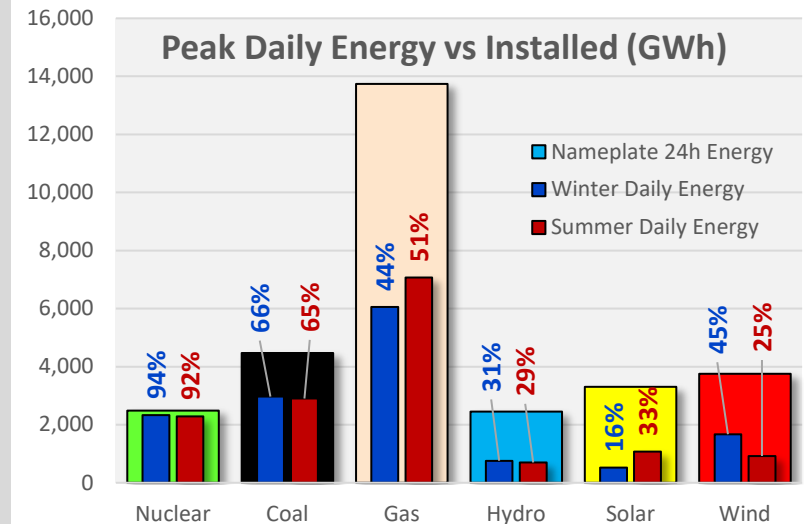
July 29, 2025



Output on Peak Hour vs Installed (GW)



Peak Daily Energy vs Installed (GWh)



Generating Technologies

Share of 2025 Generation (MWhs)

Installed 2025 Generation (MWs)

Variable

Total
19% | ~312GW

Wind



Solar PV



Wind + Solar
+ Storage &
Hybrids

Semi-Dispatchable

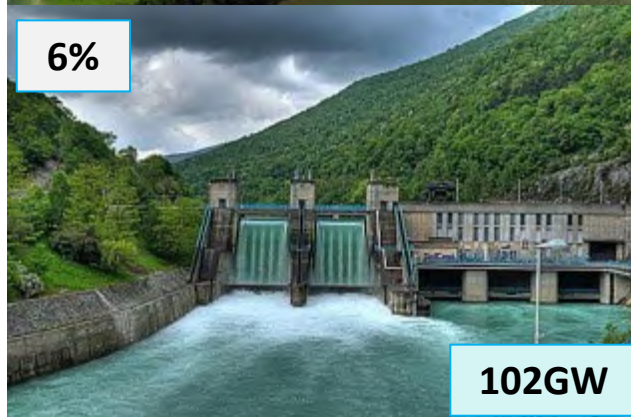
Total
23% | ~250GW



Nuclear



Hydroelectric



Peak Demand ~759GW

Dispatchable

Total
58% | ~810GW

Coal



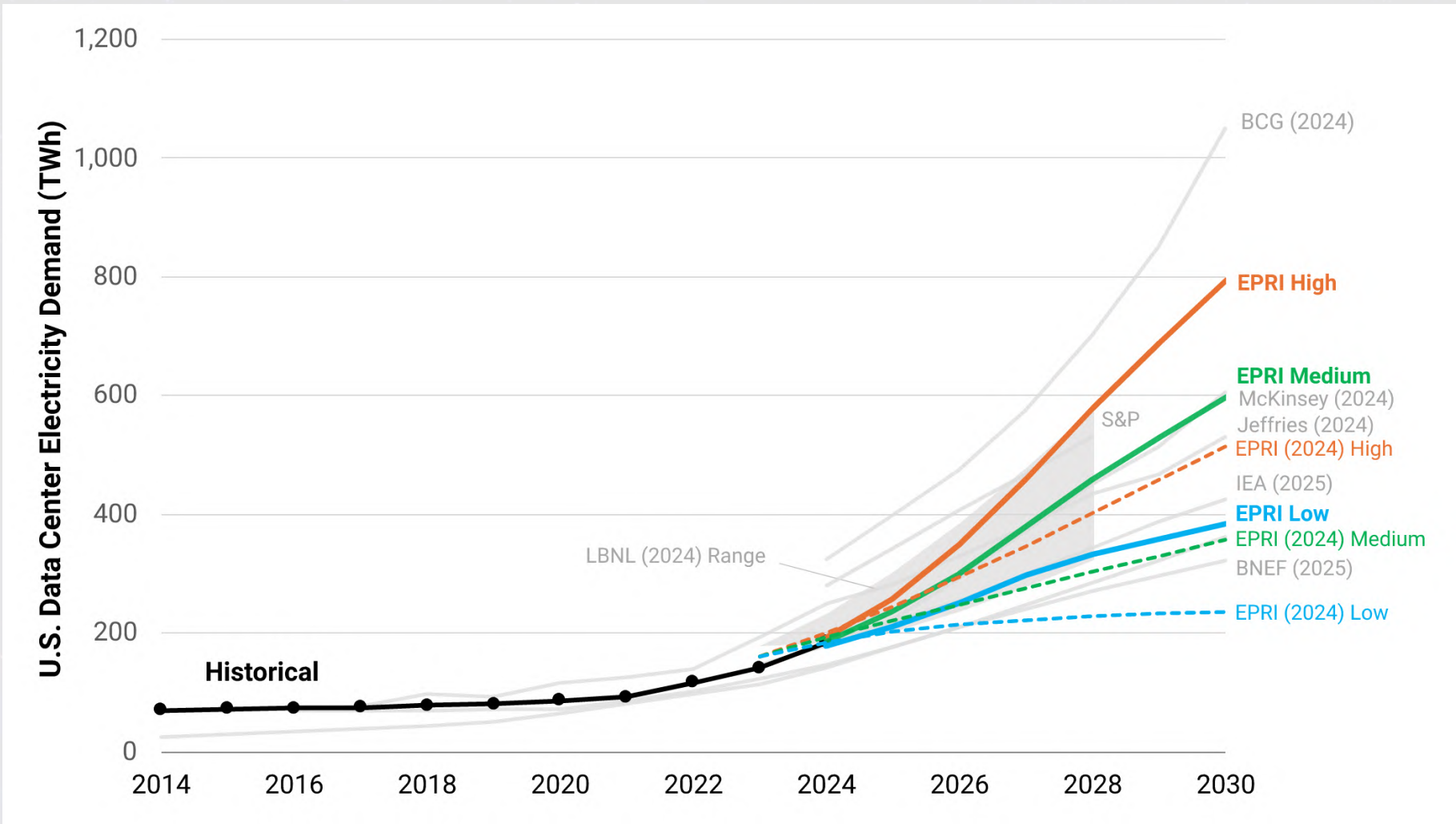
Natural Gas



Geothermal



U.S. Data Center Power Demands are Growing



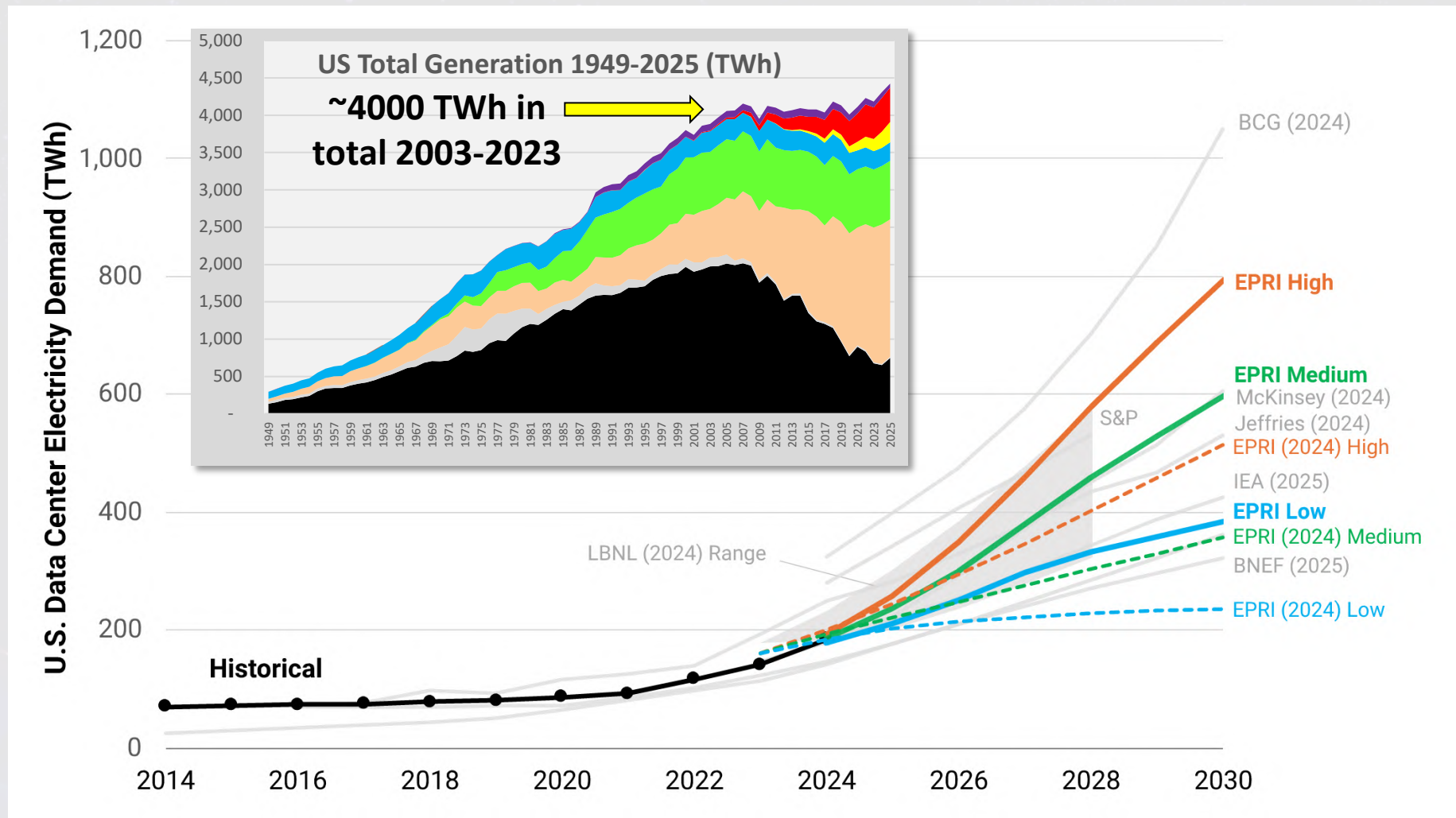
Low growth. Assumes that most projects under construction and one-fourth of those in advanced planning are fully operational by 2030.

Medium growth. Assumes that all projects under construction, 75% of those in advanced planning, and 10% in early planning are fully operational by 2030.

High growth. Assumes that all projects under construction or in advanced planning plus 30% of those in early planning are fully operational by 2030.

<https://powering-intelligence.epri.com/>

U.S. Data Center Power Demands are Growing



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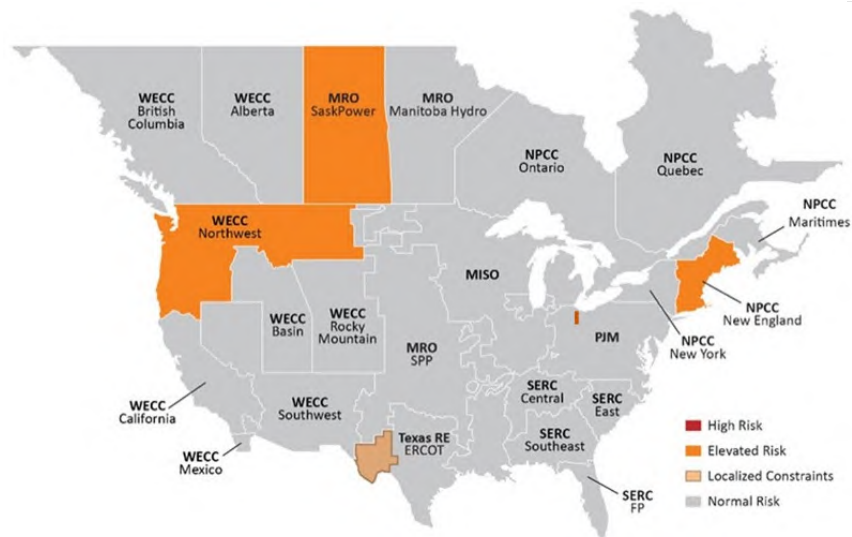
High growth. Assumes that all projects under construction or in advanced planning plus 30% of those in early planning are fully operational by 2030.

<https://powering-intelligence.epri.com/>

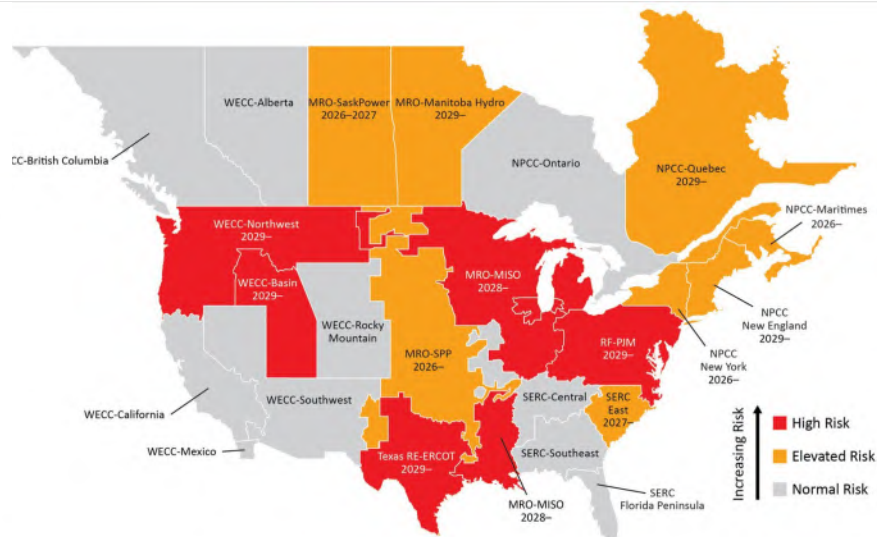
May 2026

North America

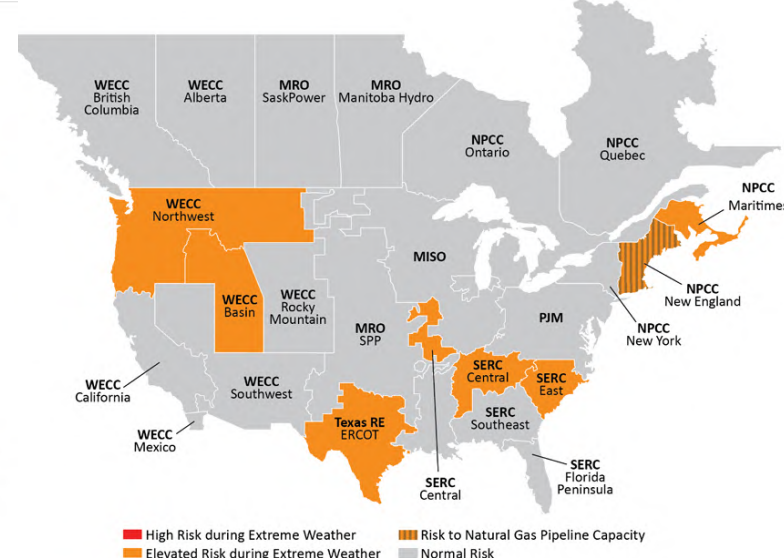
Regional Reliability Concerns



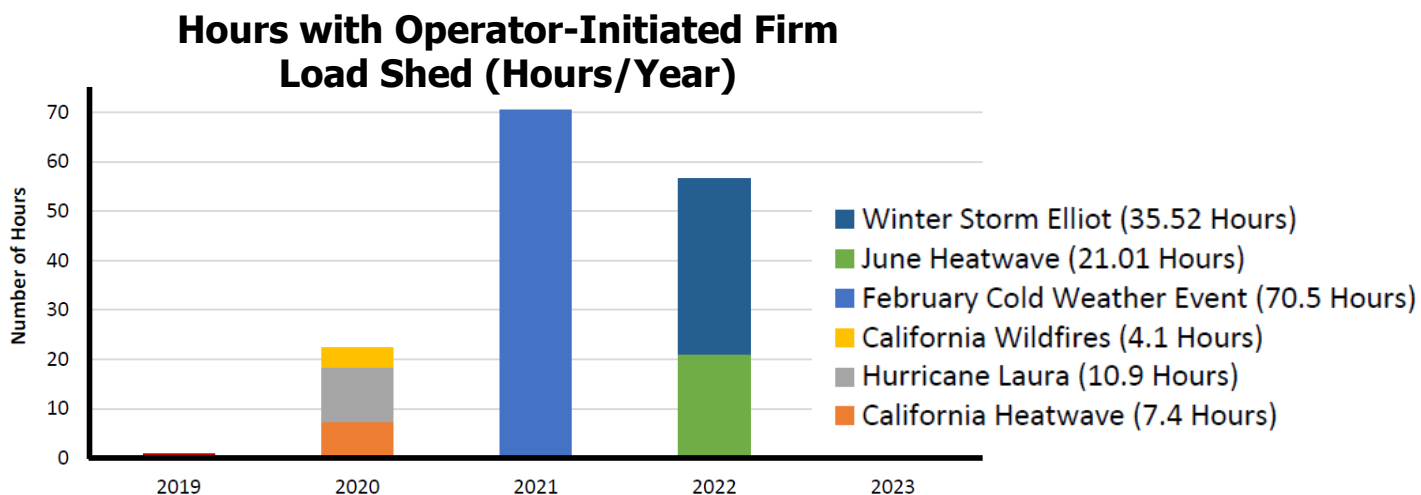
Summer 2026 Reliability Assessment



2025 Long-Term Reliability Assessment



Winter 2025/26 Reliability Assessment



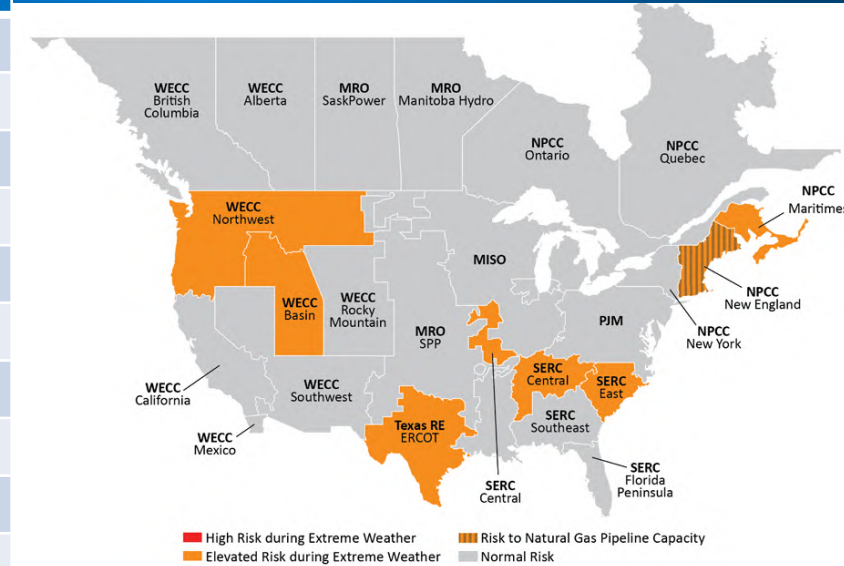
Many Regions at Elevated Risk

Minimal Load Shedding since 2022
Still many Energy Emergency Alerts 3
(21 in 2024 second highest in 5 years)

DOE Emergency Orders 2026

North America Reliability

Date and Link	Location / Order	Until
January 31, 2026	Orlando Utilities Commission (OUC) - maximum generation	10:00 a.m. EST on Feb 6, 2026.
January 31, 2026	Lakeland Electric (Florida) – maximum generation	10:00 a.m. EST on Feb 6, 2026.
January 31, 2026	Florida Municipal Power Agency (FMPA) – max generation	10:00 a.m. EST on Feb 3, 2026.
January 31, 2026	Florida Municipal Power Agency (FMPA) – max generation	10:00 a.m. EST on Feb 3, 2026.
January 31, 2026	Orlando Utilities Commission (OUC) – maximum generation	10:00 a.m. EST on Feb 6, 2026.
January 31, 2026	Duke Energy Florida – maximum generation	12:00 PM EST on February 3, 2026.
January 30, 2026	Homestead Public Services (HPS) Energy – max generation	10:00 a.m. EST on February 3, 2026.
January 30, 2026	New England Inc. (ISO-NE) – maximum generation	11:59 p.m. EST on February 14, 2026.
January 30, 2026	Duke Energy Carolinas/Progress – backup generation	12:00 p.m. EST on February 3, 2026.
January 29, 2026	PJM Region – maximum generation	11:59 p.m. EST on February 2, 2026.
January 29, 2026	PJM Interconnection – backup generation	11:59 p.m. EST on February 2, 2026.
January 29, 2026	Duke Energy - maximum generation	12:00 p.m. EST on February 3, 2026
January 26, 2026	New York ISO (NYISO) - maximum generation	February 2, 2026.
January 26, 2026	Duke Energy Carolinas/Progress – backup generation	1:59 p.m. EST on January 30, 2026.
January 26, 2026	JM Interconnection, LLC (PJM) – backup generation	11:59 p.m. EST on January 31, 2026
January 26, 2026	Duke Energy (Duke) - maximum generation	12:00 p.m. EST on January 30, 2026.
January 25, 2026	Electric Reliability Council of Texas (ERCOT) – max gen.	11:59 PM EST on January 27, 2026.
January 25, 2026	New England Inc. (ISO-NE) – maximum generation	11:59 p.m. EST on January 31, 2026.
January 25, 2026	PJM Interconnection, LLC (PJM) – maximum generation	11:59 p.m. EST on January 31, 2026.
January 24, 2026	Electric Reliability Council of Texas – backup generation	11:59 p.m. EST on January 27, 2026.



Winter 2025/26 Reliability Assessment

Many Regions at
Elevated Risk

20 Emergency Orders to Date in 2026
(Winter)

No load shedding

DOE Emergency Orders 2026

North America Reliability

Live US Power Outages

updated 11m ago

Total US Customers Out **826,094**

Outages by State

Outages by Utility

Tennessee	248,509
Mississippi	157,878
Louisiana	123,725
Texas	59,993
Kentucky	49,914
South Carolina	42,318
Georgia	38,158
North Carolina	29,284

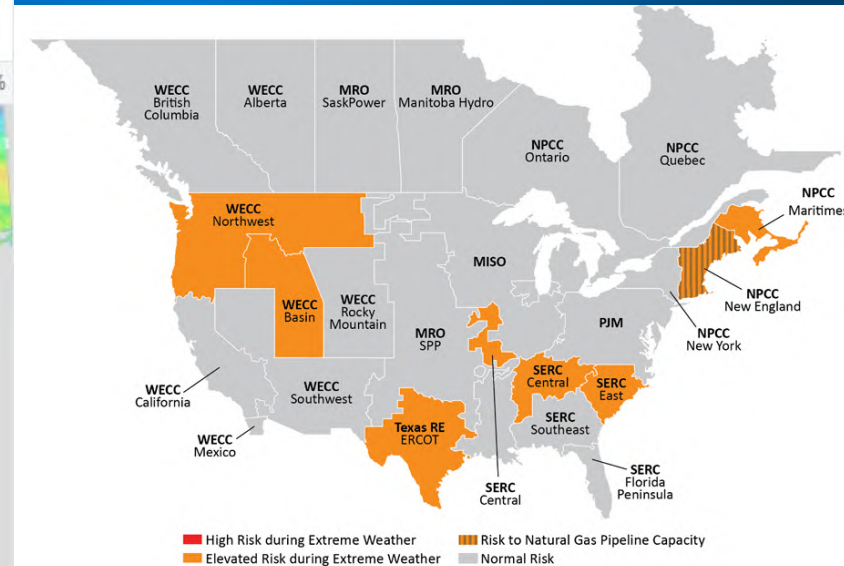
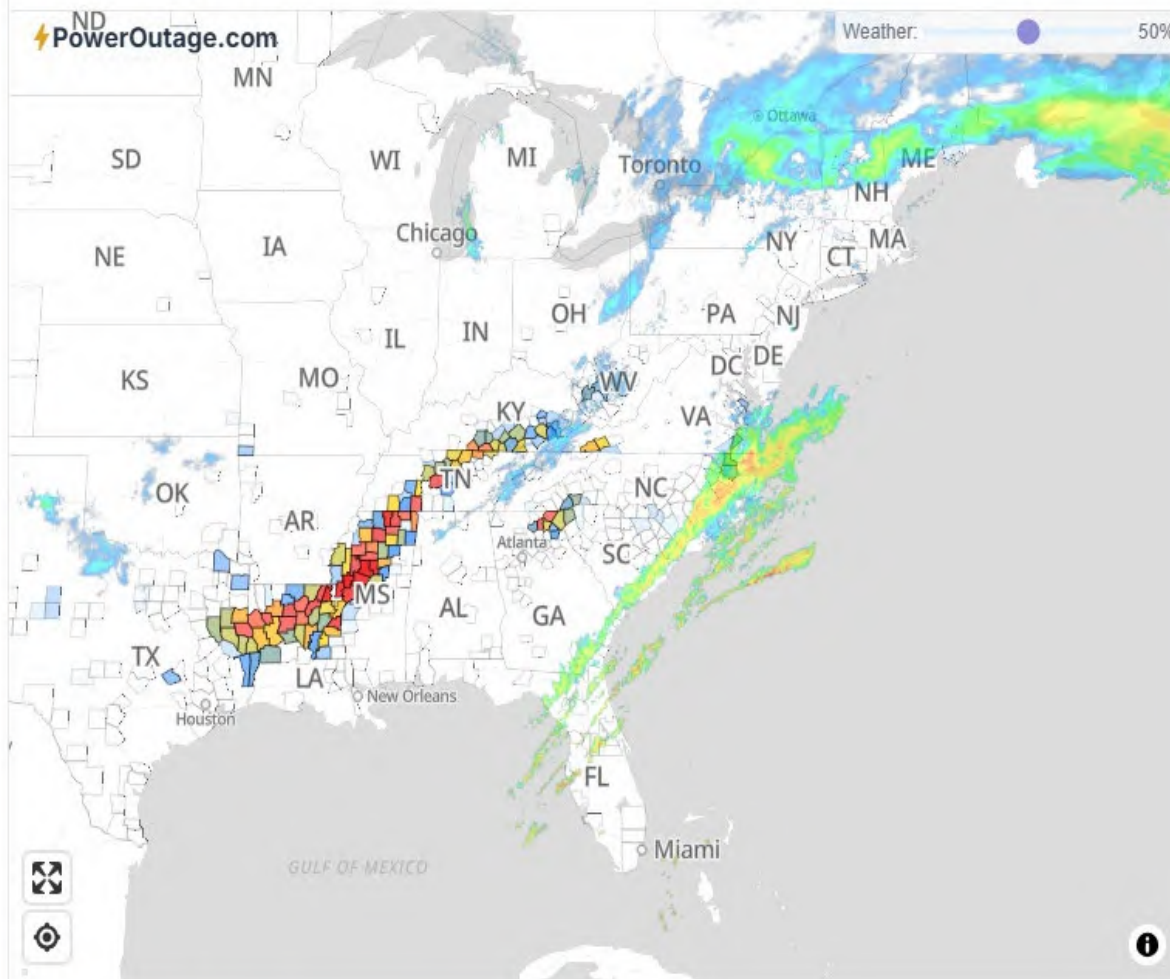
View All

Get Free Outage Alerts

Is Your Power Out?

Outage Map

ND PowerOutage.com



Winter 2025/26 Reliability Assessment

Many Regions at Elevated Risk

20 Emergency Orders to Date in 2026 (Winter)

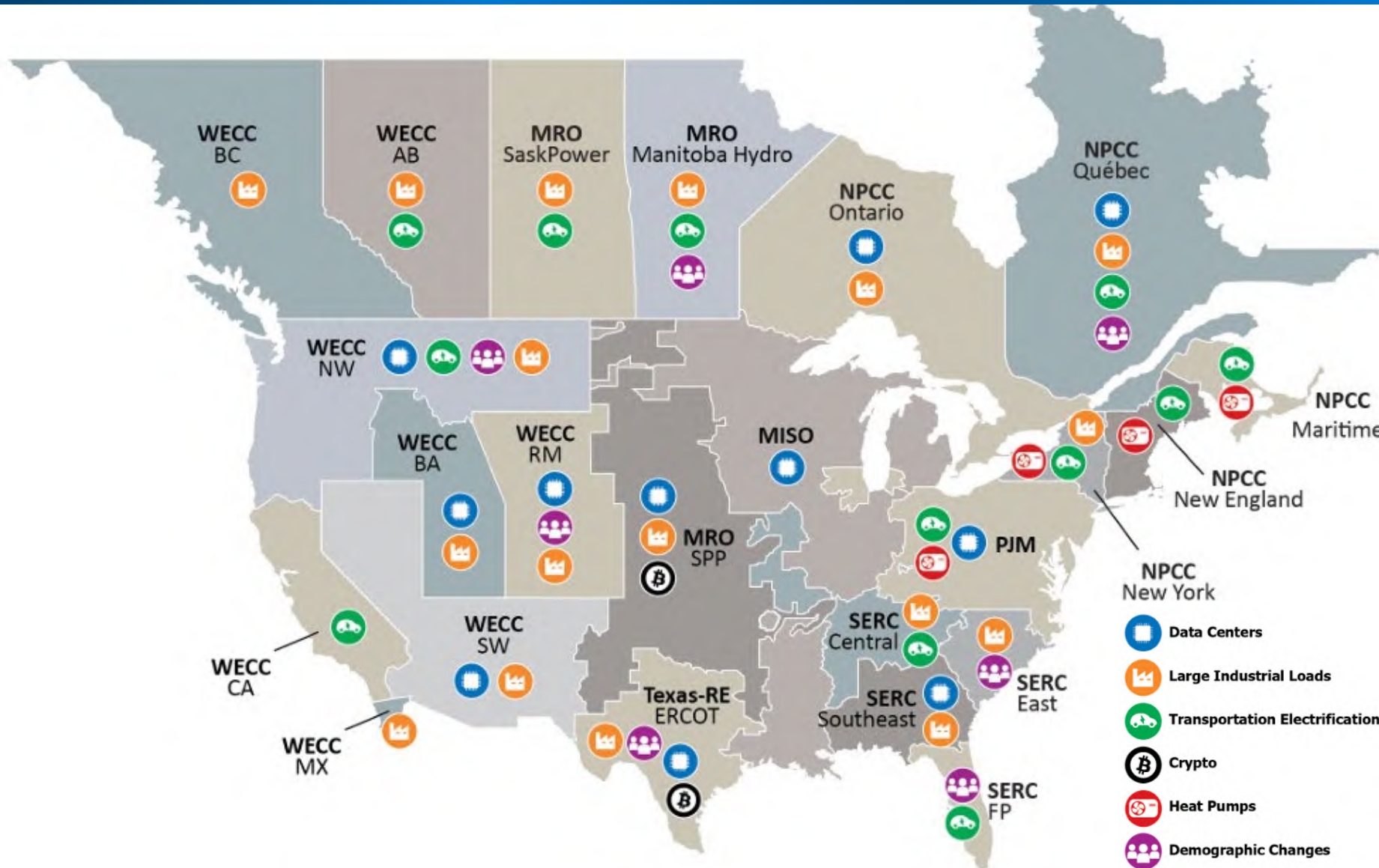
No load shedding

NERC Assessments

From Long Term Reliability Risk 2025

North America

Regional Reliability Concerns



Data Centers
Driving Load
Growth in the
United States

EPRI **DCFlex**

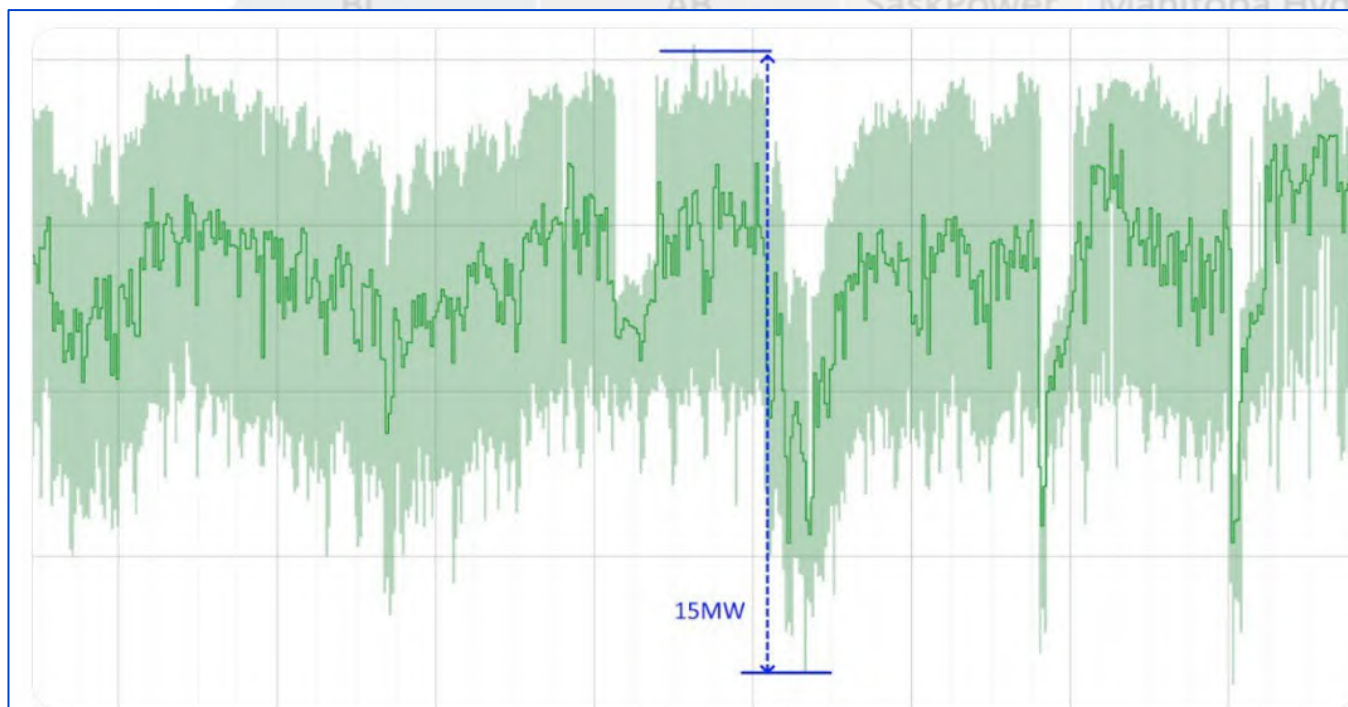


<https://dcflex.epri.com/>

NERC Large Load Task Force

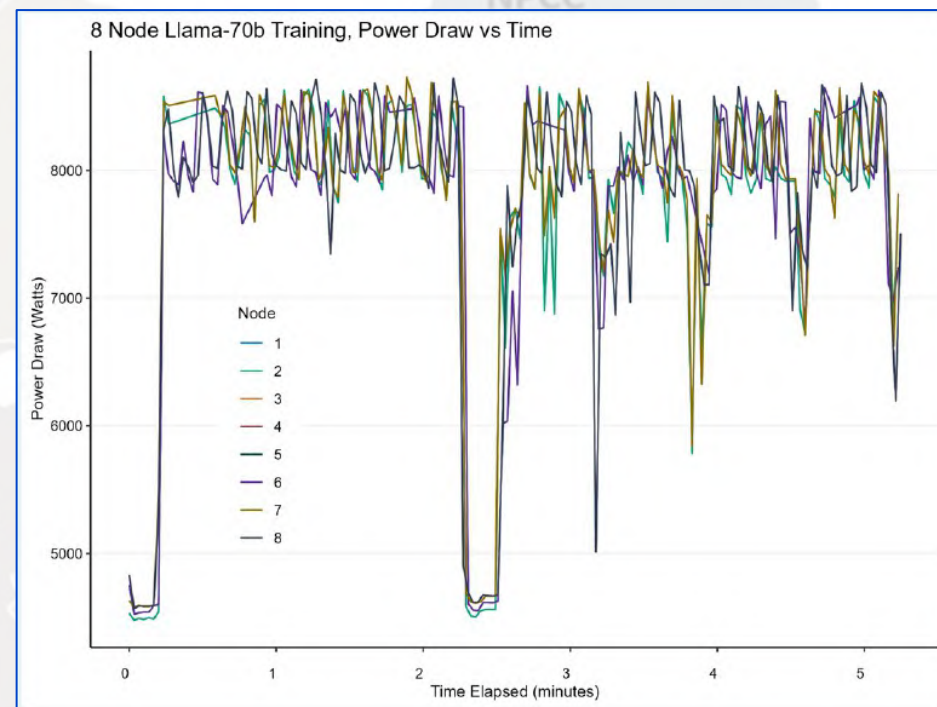
<https://www.nerc.com/initiatives/large-loads-action-plan>

AI Training and Fluctuating Demand



[Mitigating power and thermal fluctuations in ML infrastructure](#)

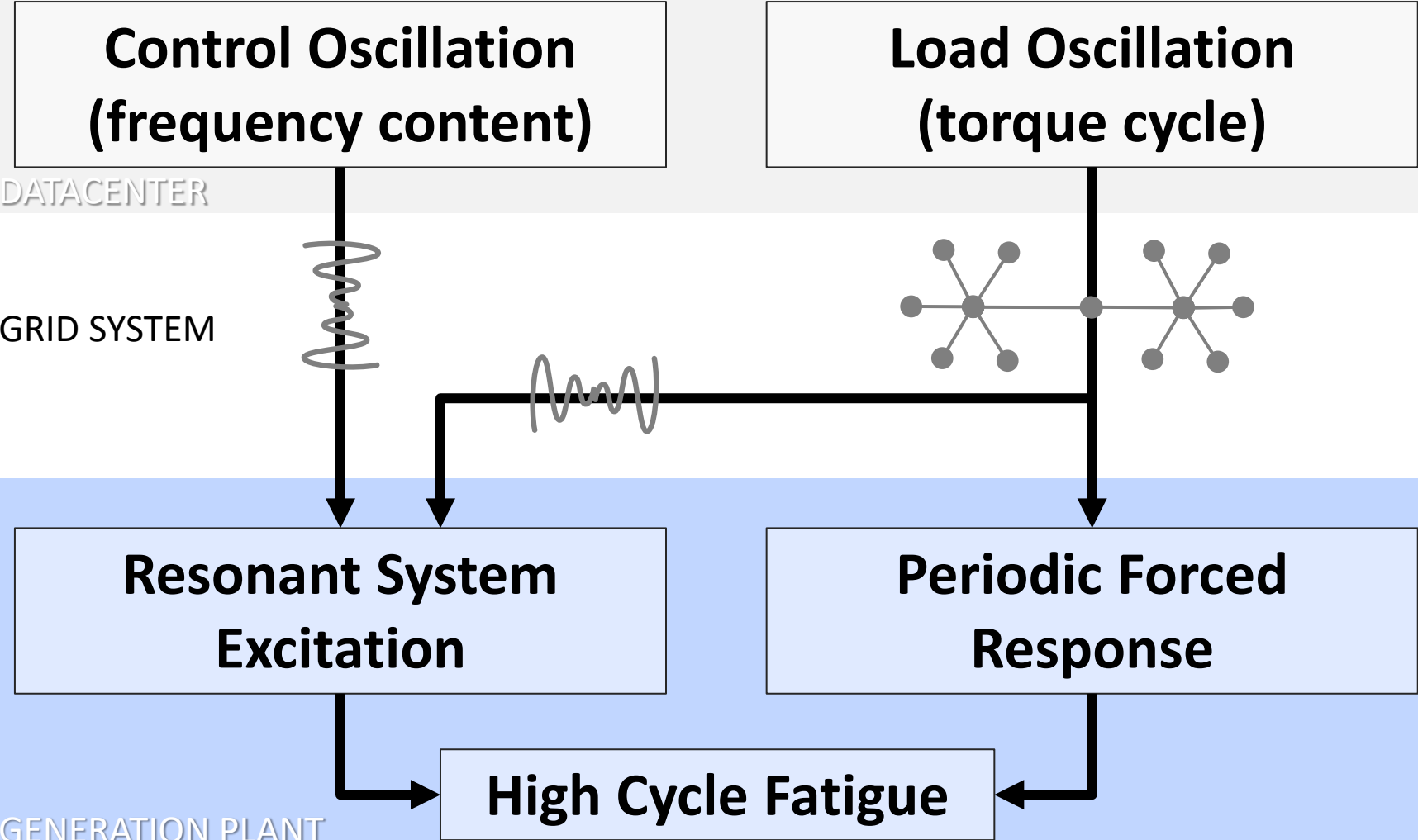
[Google Cloud Blog](#)



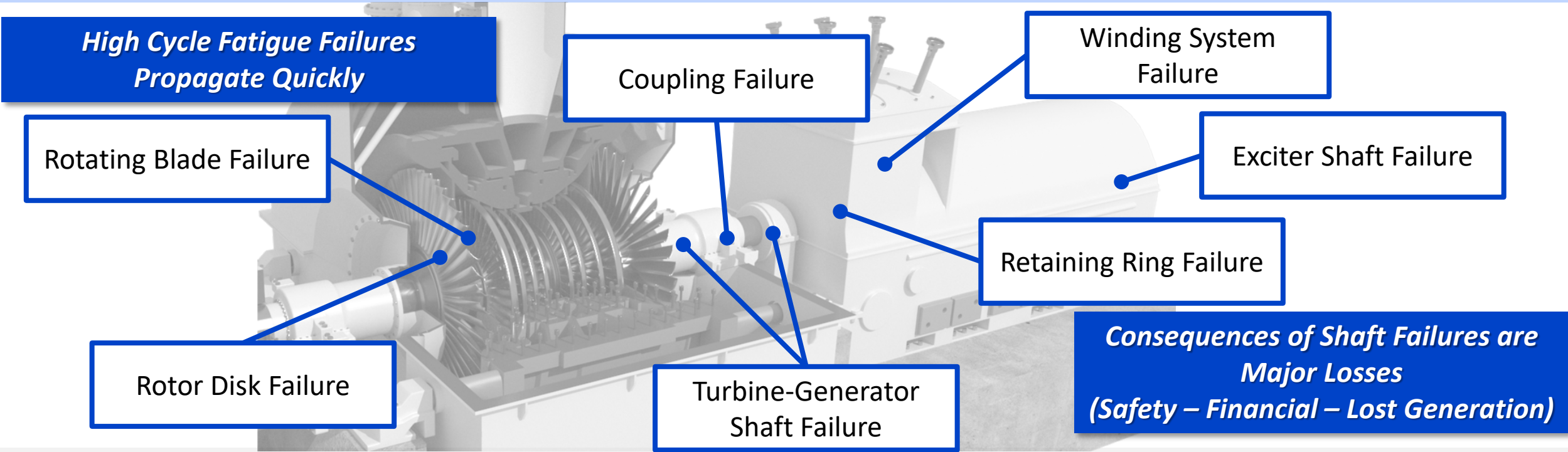
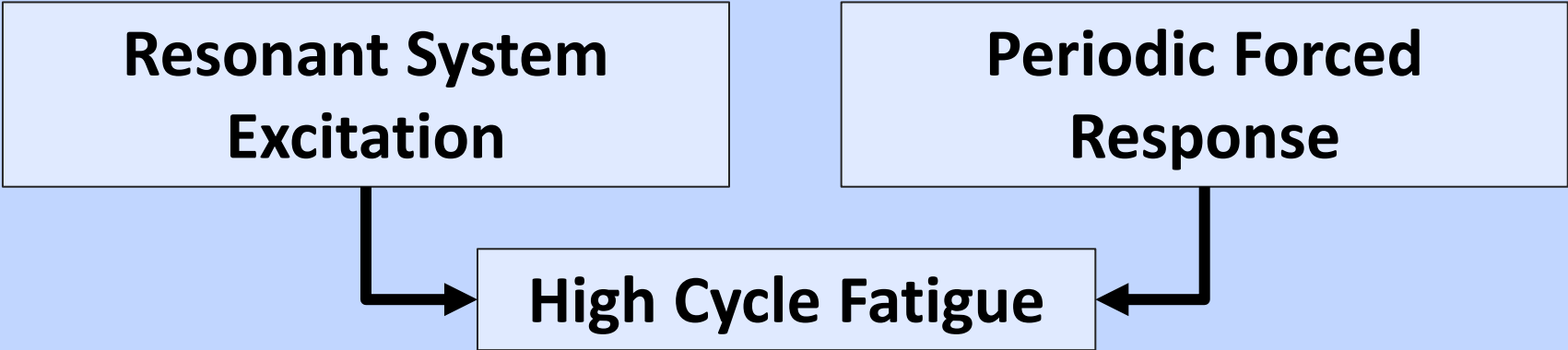
[bnl-2024-united-states-data-center-energy-usage-report 1.pdf](#)

- The spikes in power are caused by GPU synchronized computation demand.
- These shapes can be different for different entities and depends on how their models are trained
- These can trigger unwanted oscillations as well as flicker issues

Effects Related on Synchronous Generation Resources



Effects Related on Synchronous Generation Resources

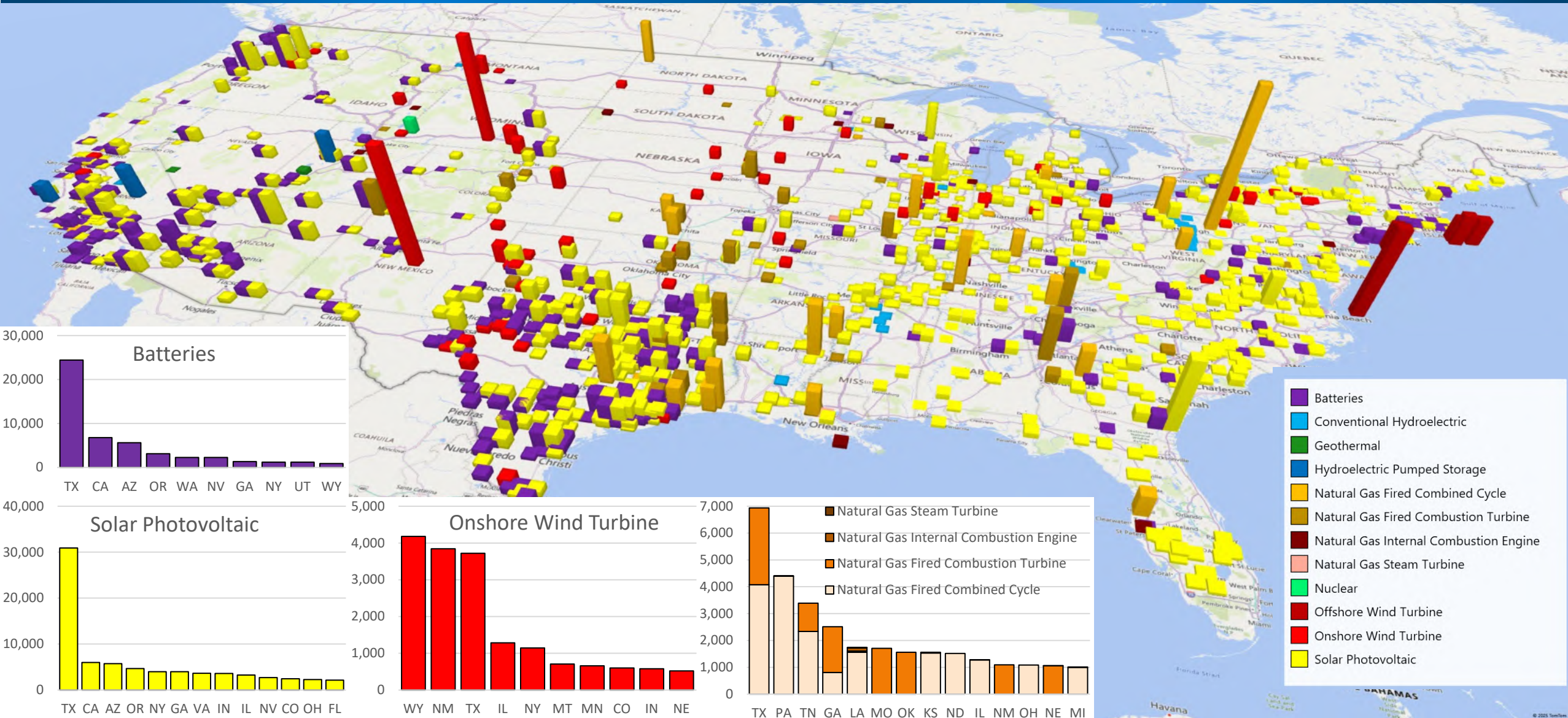


US Additions

EIA 860 Data Generation

Planned 2026-2031

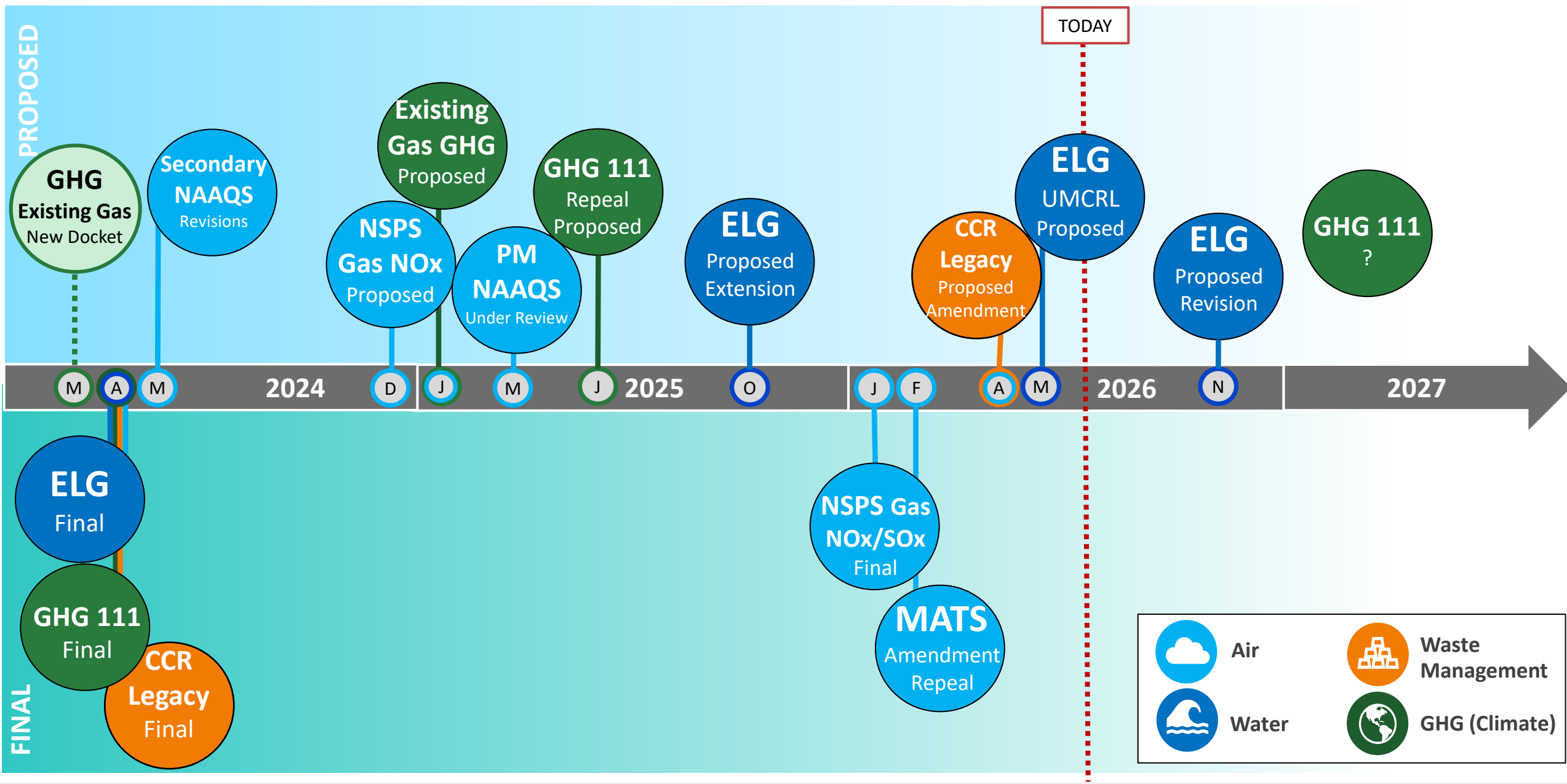
State by State





Rules and Regs

Recent EPA Regulation Activity



EPA Regulation Trends



Greenhouse Gas

Existing Coal & New/Existing Gas

Proposed repeal of the 111 rule (2025)

Rescission of the Endangerment Finding (2026)



Water

Existing Coal

Proposed Revisions to Steam Electric Effluent Limitation Guidelines (ELG)

- Compliance dates delayed until 2034
- More information on zero liquid discharge experience and development requested
- Addition of unmanaged leachate



Waste Management

Existing & Retired Coal

Coal Combustion Residual (CCR) rule activity

- Legacy impoundment proposed amendments
- Beneficial use clarifications
- Compliance timeline delays



Air

Existing Coal, Gas & Oil Fired

Removal of MATS amendments

Reconsideration of multiple CAA rules

- PM NAAQS
- Ozone NAAQS

New NOx & SOx New Source Performance Standards for Gas Turbines

Potential
Actions

Significant Investment in Coal or Retirement

Capacity / Efficiency Limits for Gas

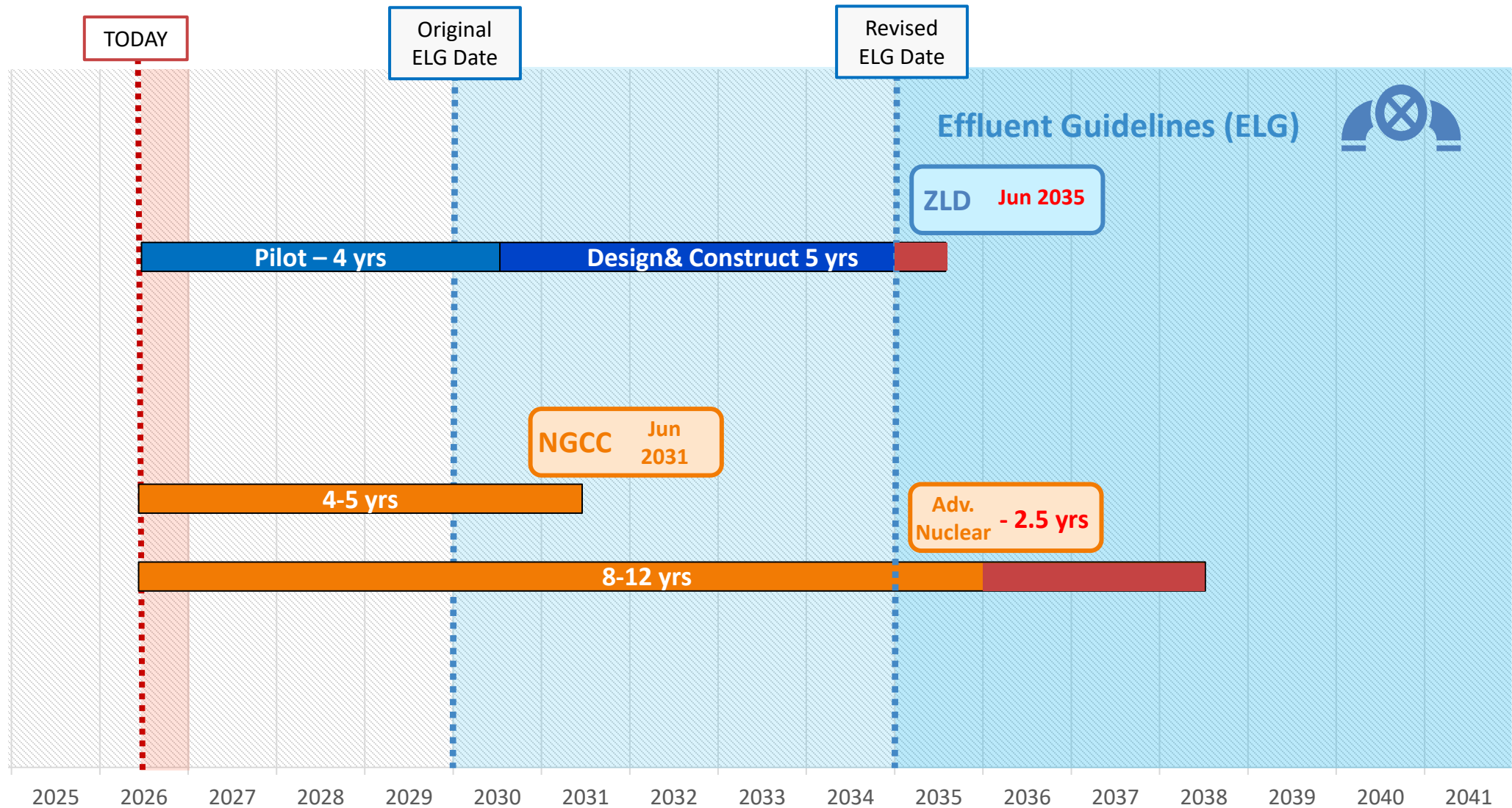
Significant Post-retirement Water Treatment

Additional Impoundment Closures / Remediation

Potential regional fleet impacts

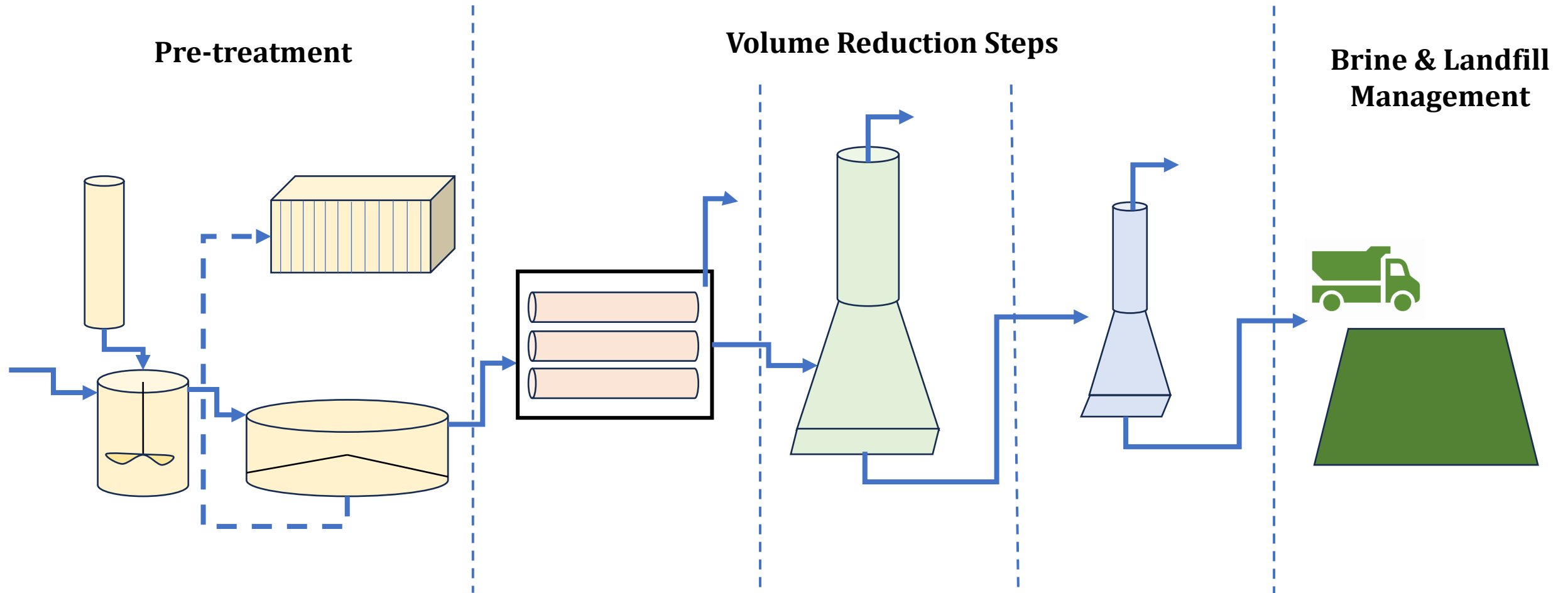
Isolated unit-specific controls improvements

ELG timing drives Energy Supply Decisions



Decision timing may have passed to allow for piloting.

ZLD is complex & very site specific



There are up to 5 unit operations for a ZLD treatment train. The optimal treatment train for each site will vary based on water quality, available solids for brine management, and pilot testing results. (It's complex!)

Effluent Limitation Guidelines (ELG) Piloting for Zero Liquid Discharge (ZLD) Treatment Technologies

Objectives and Scope

- Pilot-scale testing of innovative membrane and/or thermal treatment technologies for zero liquid discharge
- Scope for host sites includes technoeconomic analysis (TEA), on-site pilot testing, and brine management testing

Value

- Collaborative project for treatment train development and obtaining performance data and operational experience
- Share and advance real-time learning on testing complex wastewater streams
- Optimize system design to maximize performance and reliability and minimize O&M costs

Current Host Site Funders:



3 Addition
Host Sites
Pending

Current Non-Host Site Funders:



Details & Contact

- Host site cost will be based on scope for the site
- Funding can be spread equally over two (2) years

Keith Ambrose

- kambrose@epri.com, (919) 656-3197

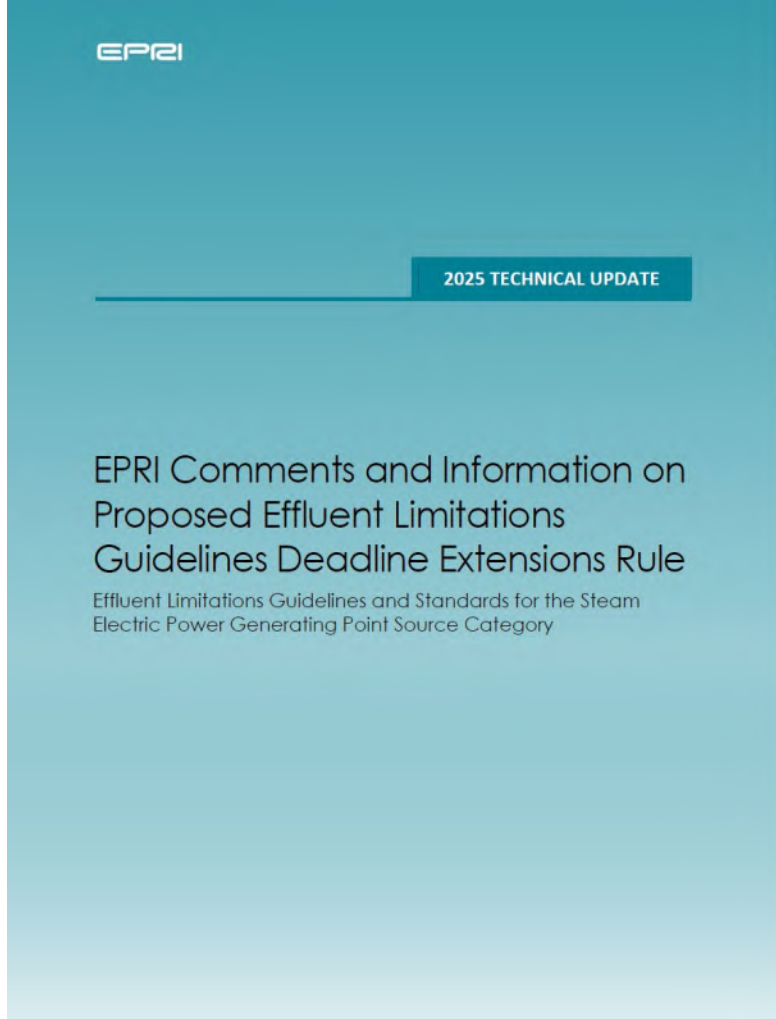
SPN Number: 3002032681

We need broad collaboration to solve the challenges of ELG ZLD together

The background of the slide features a blue-toned image of two hands cupping a globe. Overlaid on this is a faint, ethereal starry sky with glowing nebulae and distant stars, creating a cosmic or global theme.

REFERENCE SLIDES

EPRI 2025 Comments – Summary



[EPRI ELG Comments](#)

- ZLD systems are complex to design, operate, and maintain
- Implementation at existing facilities demonstrates that ZLD was costly, difficult to operate, and often fell short of achieving a zero liquid discharge
- Volume reduction technologies require extensive site-specific assessments, based on fuel type, materials of construction, discharge rate, water quality constraints, solid waste disposal options, etc
- The cost basis does not align with current industry practices such as design flow rates, required redundancy, and pre-treatment requirements
- Benefits were largely related to unit retirements and non-water quality benefits, which may be overestimated given the changing energy industry

Zero Liquid Discharge is a complex, multi-step solution, not a technology.

Full-Scale ZLD Capital Project – Example Timeline

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Example:	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
New ZLD Wastewater Treatment System						Old Compliance Date (2024 ELGs)		New Compliance Date (2025 ELGs)		
	Sampling					In 2023, EPA estimated 22 facilities with wet FGDs operating past 2032. Manufacturing times could by delayed due to the number of concurrent projects.				
	TEA									
		Pilot-Soften, RO, Thermal								
		Extra time allotted for potential vendor delays due to high demand for pilot equipment.		Pilot-Brine Mgt						
				Permitting						
				Design, Eng.						
						Procure, Manufacture				
							Construction, Install			
									Performance Test, Commission	
New Landfill (if needed)										
					Site Selection					
						Permitting (wetlands, solid waste construction)				
									LF Construction	

Decision timing may have passed to allow for piloting.

ELG Technology Research Pathways

Phys/Chem + Bio + UF

- User Group
- Benchmarking
- Site assessments
- Training

Zero Liquid Discharge

- Technoeconomic analysis (TEA)
- Case studies
- Piloting
- Brine management

Semi-Passive

- Data collection
- Technology assessment
- Piloting

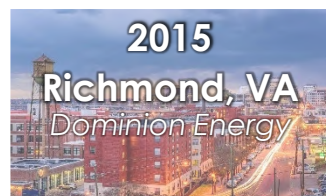
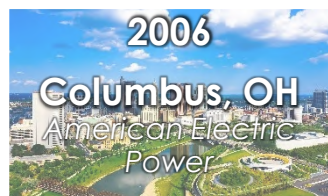
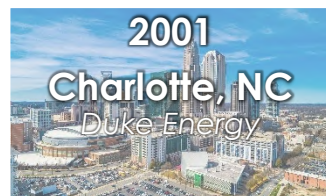
Multi-pronged approach to support successful WWTS

Key Takeaways

- ZLD will be the most complex system at your power plant
- Piloting is critical to answer site- and technology-dependent open questions
- Goal is to develop safe, reliable, and environmentally compliant systems while minimizing OpEx costs
- Collaboration is needed for success!



CEMUG Through the Years



Continuous Emissions Monitoring & Measurements

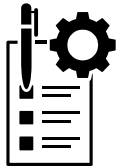
www.epri.co/emissions



Development, evaluation and demonstration of new technologies and methods



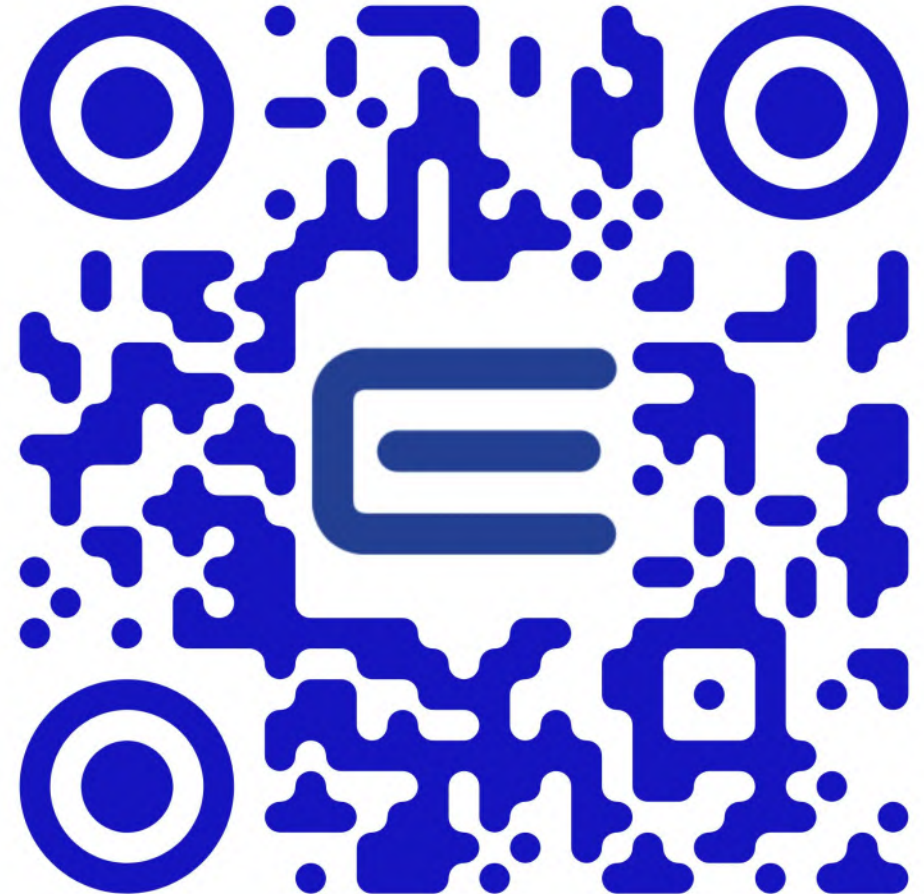
Support in attaining more safe, reliable and economical O&M of their CEM systems



Technical and administrative guidance to demonstrate compliance



Knowledge transfer opportunities, methods & tools



Program Manager: Cassie Shaban | 650.855.2345 | cshaban@epri.com



2026 Power Sector Updates from US EPA's Regulatory Assistance Division

2026 EPRI CEMUG Conference

Denver, Colorado

May 5, 2026

Today's Agenda

Final NSPS for Combustion Turbines

- 40 CFR Part 60, NSPS Subpart KKKKa
- Published in Federal Register on January 15, 2026

Final Repeal of EGU MATS Amendments

- 40 CFR Part 63, NESHAP Subpart UUUUU
- Published in Federal Register on February 24, 2026

US EPA Reorganization

Final Subcategories, BSER, and NO_x Standards

Size (MMBtu/h)	Utilization	Efficiency	Final BSER	Final NO _x Standard
Large (> 850 MMBtu/h)	> 45%	-	Combustion Controls + SCR	5 ppm
	≤ 45%	> 38%	Combustion Controls	25 ppm
	≤ 45%	≤ 38%	Combustion Controls	9 ppm
Medium (> 50 and ≤ 850 MMBtu/h)	> 45%	-	Combustion Controls	15 ppm
	≤ 45%	-	Combustion Controls	25 ppm
Small (≤ 50 MMBtu/h)	Any	-	Combustion Controls	25 ppm

Notes:

- The EPA bases utilization on the 12-calendar-month capacity factor of an individual source.
- Standards are for new combustion turbines firing natural gas.
- There are separate standards for modified or reconstructed combustion turbines, combustion turbines firing non-natural gas fuels, and combustion turbines operating at part loads.



Executive Orders

Federal Powers Act

Use of Emergency Authority

Emergency Orders

Regional Reliability Concerns

**THIS WAS THE STATUS
LAST YEAR**

DOE 202(c) Emergency Orders:

- On [May 30, 2025](#), Department of Energy (DOE) issued an emergency order, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection. The emergency order directs PJM, in coordination with Constellation Energy, to ensure specified generation units at the **Eddystone Generation Station in Pennsylvania** remain available for operation, minimizing the risk of generation shortfall that could lead to unnecessary power outages.
 - Expires August 28, 2025
- On [May 23, 2025](#), Department of Energy (DOE) issued an emergency order, pursuant to section 202(c) of the Federal Power Act, to Midcontinent Independent System Operator (MISO). The emergency order directs MISO, in coordination with Consumers Energy, to ensure that the **J.H. Campbell Power Plant in West Olive, Michigan** remains available for operation, minimizing any potential generation shortfall that could lead to unnecessary power outages.
 - Expires August 21, 2025

Coal Plant Closures
subject to
Emergency Orders
Under DOE Federal
Powers Act

Eddystone order
references EO 14262

<https://www.federalregister.gov/documents/2025/04/14/2025-06381/strengthening-the-reliability-and-security-of-the-united-states-electric-grid>

Emergency Orders

DOE Federal Power Act

US Policy

Order to Delay Retirement

	2025	Status
Conventional Steam Coal (MW)		
Comanche (CO)	335	Extended by CO PUC to end of 2026
Craig (CO)	427	2 nd 90 Day Extension
F B Culley	90	2 nd 90 Day Extension
Intermountain Power Project	1800	Retired but in Mothballs by Utah State Action
J H Campbell	1330.5	5 th 90 Day Extension
R M Schahfer	722	2 nd 90 Day Extension
Transalta Centralia Generation	670	2 nd 90 Day Extension
Natural Gas Steam Turbine (MW)		
Eddystone Generating Station	760	5 th 90 Day Extension
Petroleum Liquids (MW)		
Allen	427.2	Replaced by CCGT

**DOE's Use of Federal
Power Act Emergency
Authority**

**Grand Total
4000 MW on 90 Day
Extensions**

<https://www.energy.gov/ceser/does-use-federal-power-act-emergency-authority>

DOE Federal Power Act Retirement Delays

Tri-State Craig

- On [March 30, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-21**, pursuant to section 202(c) of the Federal Power Act, to **Tri-State Generation and Transmission Association (Tri-State), Platte River Power Authority, Salt River Project, PacifiCorp, and Public Service Company of Colorado (Xcel Energy) ("co-owners")**. The order directs Tri-State and the co-owners, in coordination with the Western Area Power Administration (WAPA) Rocky Mountain Region and Southwest Power Pool (SPP), to take all measures necessary to ensure that Unit 1 at the Craig Station in Craig, Colorado is available to operate. This order is in effect beginning on March 31, 2026, through June 28, 2026.
- On [December 30, 2025](#), Department of Energy (DOE) issued emergency order 202-25-14, pursuant to section 202(c) of the Federal Power Act, to Tri-State Generation and Transmission Association (Tri-State), Platte River Power Authority, Salt River Project, PacifiCorp, and Xcel Energy ("co-owners"). The order directs Tri-State and the co-owners, in coordination with the Western Area Power Administration (WAPA) - Rocky Mountain Region and Southwest Power Pool (SPP) West, to take all measures necessary to ensure that Unit 1 at the Craig Station in Craig, Colo. is available to operate. This order is in effect beginning on December 30, 2025, and continues until March 30, 2026.

CenterPoint F.B. Culley

- On [March 23, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-20**, pursuant to section 202(c) of the Federal Power Act, to **CenterPoint Energy and the Midcontinent Independent System Operator, Inc. (MISO)**. The order directs CenterPoint Energy and MISO to take all measures necessary to ensure that Unit 2 at the F.B. Culley Generating Station in Warrick County, Ind. is available to operate. This order is in effect beginning on March 24, 2026, through June 21, 2026.
- On [December 23, 2025](#), Department of Energy (DOE) issued emergency order 202-25-13, pursuant to section 202(c) of the Federal Power Act, to CenterPoint Energy and the Midcontinent Independent System Operator, Inc. (MISO). The order directs CenterPoint Energy and MISO to take all measures necessary to ensure that Unit 2 at the F.B. Culley Generating Station in Warrick County, Ind. is available to operate. This order is in effect beginning on December 23, 2025, and continues until March 23, 2026.

NIPSCO Schahfer

- On [March 23, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-19**, pursuant to section 202(c) of the Federal Power Act, to **Northern Indiana Public Service Company (NIPSCO) and the Midcontinent Independent System Operator, Inc. (MISO)**. The order directs NIPSCO and MISO to take all measures necessary to ensure that Units 17 and 18 at the Schahfer Generating Station in Wheatfield, Ind. are available to operate. This order is in effect beginning on March 24, 2026, through June 21, 2026.
- On [December 23, 2025](#), Department of Energy (DOE) issued emergency order 202-25-12, pursuant to section 202(c) of the Federal Power Act, to Northern Indiana Public Service Company (NIPSCO) and the Midcontinent Independent System Operator, Inc. (MISO). The order directs NIPSCO and MISO to take all measures necessary to ensure that Units 17 and 18 at the Schahfer Generating Station in Wheatfield, Ind. are available to operate. This order is in effect beginning on December 23, 2025, and continues until March 23, 2026.

TransAlta Centralia

- On [March 16, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-18**, pursuant to section 202(c) of the Federal Power Act, to **TransAlta Centralia Generation LLC (TransAlta)**. The order directs TransAlta to ensure Unit 2 of the Centralia Generating Station in Centralia, Washington remains available for operation. This order is in effect beginning on March 17, 2026, through June 14, 2026.
- On [December 16, 2025](#), the Department of Energy (DOE) issued emergency order 202-25-11, pursuant to section 202(c) of the Federal Power Act, to TransAlta. The order directs TransAlta to ensure Unit 2 of the Centralia Generating Station in Centralia, Washington remains available for operation. This order is in effect beginning on December 16, 2025, and continues until March 16, 2026.

Talen Wagner

- On [May 21, 2026](#), Department of Energy (DOE) issued emergency DOE Order No. 202-26-25, pursuant to section 202(c) of the Federal Power Act, for Unit 4 at the Wagner Generating Station. The order authorizes PJM Interconnection, L.L.C. (PJM), in coordination with the Talen Energy Corporation, to run Unit 4 at the Wagner Generating Station in Anne Arundel County, Maryland to meet anticipated electricity demand. This order is in effect beginning on May 22, 2026 and continues until August 19, 2026.
- On [October 24, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-6A, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection (PJM). PJM shall, in coordination with the Talen Energy Corporation, operate specified units at the Wagner Generating Station to meet anticipated electricity demand heading into the winter months. This order is in effect beginning on October 26, 2025, and continues until December 31, 2025.
- On [July 28, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-6, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection (PJM). PJM shall, in coordination with Talen Energy Corporation, operate Unit 4 at the Wagner Generating Station as PJM deems necessary beyond its environmental run-hour limitations through October 26, 2025.

Constellation Eddystone

- On [May 21, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-24**, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection, L.L.C. (PJM). The order directs PJM, in coordination with Constellation Energy Corporation, to ensure Units 3 and 4 of the **Eddystone Generating Station** in Pennsylvania remain available to operate and to employ economic dispatch to minimize costs for the American people. This order is in effect beginning on May 25, 2026, through August 22, 2026.
- On [February 23, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-17**, pursuant to section 202(c) of the Federal Power Act, to **PJM Interconnection, L.L.C. (PJM)**. The order directs PJM, in coordination with Constellation Energy Corporation, to ensure Units 3 and 4 of the Eddystone Generating Station in Pennsylvania remain available for operation and to employ economic dispatch to minimize costs for the American people. This order is in effect beginning on February 24, 2026, through May 24, 2026.
- On [November 25, 2025](#), the Department of Energy (DOE) issued emergency order 202-25-10, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection (PJM). The order directs PJM, in coordination with Constellation Energy, to ensure Units 3 and 4 of the Eddystone Generating Station in Pennsylvania remain available for operation. This order is in effect beginning on November 26, 2025, and continues until February 24, 2026.
- On [August 28, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-8, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection (PJM). The order directs PJM, in coordination with Constellation Energy, to ensure Units 3 and 4 of the Eddystone Generating Station in Pennsylvania remain available for operation. This order is in effect beginning on August 28, 2025, and continues until November 26, 2025.
- On [May 30, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-4, pursuant to section 202(c) of the Federal Power Act, to PJM Interconnection. The emergency order directs PJM, in coordination with Constellation Energy, to ensure specified generation units at the Eddystone Generation Station in Pennsylvania remain available for operation, minimizing the risk of generation shortfall that could lead to unnecessary power outages.

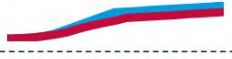
Consumers J.H. Campbell

- On [May 18, 2026](#), the Department of Energy (DOE) issued emergency DOE **Order No. 202-26-22**, pursuant to section 202(c) of the Federal Power Act, to the **Midcontinent Independent System Operator (MISO)**, in coordination with Consumers Energy. The order directs MISO to ensure that the J.H. Campbell coal-fired power plant in West Olive, Michigan remains available to operate and to employ economic dispatch to minimize costs for the American people. This order is in effect beginning on May 19, 2026 and continues until August 16, 2026.
- On [February 17, 2026](#), the Department of Energy (DOE) issued DOE **Order No. 202-26-16**, pursuant to section 202(c) of the Federal Power Act, to the **Midcontinent Independent System Operator (MISO)**, in coordination with Consumers Energy. The order directs MISO to ensure that the J.H. Campbell coal-fired power plant in West Olive, Michigan remains available for operation and to employ economic dispatch to minimize costs for the American people. This order is in effect beginning on February 17, 2026 and continues until May 18, 2026.
- On [November 18, 2025](#), the Department of Energy (DOE) issued emergency order 202-25-9, pursuant to section 202(c) of the Federal Power Act, to the Midcontinent Independent System Operator (MISO). The emergency order directs MISO, in coordination with Consumers Energy, to ensure that the J.H. Campbell Power Plant in West Olive, Michigan remains available for operation, minimizing any potential generation shortfall that could lead to unnecessary power outages. Additionally, MISO is directed to take every step to minimize cost to the American people. This order is in effect beginning on November 19, 2025, and continues until February 17, 2026.
- On [August 20, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-7, pursuant to section 202(c) of the Federal Power Act, to Midcontinent Independent System Operator (MISO). The emergency order directs MISO, in coordination with Consumers Energy, to ensure that the J.H. Campbell Power Plant in West Olive, Michigan remains available for operation, minimizing any potential generation shortfall that could lead to unnecessary power outages. This order is in effect beginning on August 21, 2025, and continuing until November 19, 2025.
- On [May 23, 2025](#), the Department of Energy (DOE) issued emergency order No. 202-25-3, pursuant to section 202(c) of the Federal Power Act, to Midcontinent Independent System Operator (MISO). The emergency order directs MISO, in coordination with Consumers Energy, to ensure that the J.H. Campbell Power Plant in West Olive, Michigan remains available for operation, minimizing any potential generation shortfall that could lead to unnecessary power outages.

Summary of OBBBA (2025)

Energy Tax Credits

US Energy Supply Changing Policy

Technology	IRA Incentives (2022-2025) vs OBBBA Policy Changes (2025 onward)		Industry Outlook ² in the U.S. with OBBBA	
Solar & Wind		48E and 45Y credits available until 2033 - Phased out after 2027¹; sourcing rules tightened (FEOC)		- Continued growth trend through 2030, significant slow-down by 2035³ - Overall higher electricity end-user prices
Green Hydrogen		45V credit available until 2033 - Phased out by 2028		Deployment undermined by weak demand, loss of incentives, and sourcing restrictions
Electric Vehicles		30D, 25E, and 45W credits for EVs; 30C for charging infrastructure - Phased out by 2026 (30D/25E/45W by Oct 2025, 30C by Jul 2026)		Consumer adoption hit by loss of credits and policy uncertainty
Manufacturing		45X and 28C credits support clean tech supply chain 45X phased out after 2027 (wind) and 2028 (solar/storage); 48C compromised by sourcing rules		- Clean energy manufacturing hit by loss of credits and supply chain constraints - Subsidy loss threatens existing investments
Carbon Capture		45Q credit available until 2033 - Preserved; EOR provisions enhanced		Growth in oil and gas CCS, challenged by foreign entity restrictions
Energy Storage		48E credit available until 2033 - Preserved in full		Preserved credits support growth, challenged by foreign entity restrictions
Biofuels		45Z credit available until 2027 - Extended to 2029; feedstock sourcing rules tightened; capped SAF		Slow adoption, challenged by foreign entity restrictions
Geothermal		48E and 45Y credits available until 2033 - Preserved in full		- Moderate growth from low baseline - R&D support for superhot geothermal
Nuclear		- ITC/PTC for new, 45U for existing plants available until 2033 - Preserved in full; fuel sourcing rules apply after 2028		- Challenges remain for large ~1GW reactors - More optimistic outlook for SMRs, XMRs
Oil, Gas		- No support - Gains tax breaks, public land access, and regulatory rollbacks		Stable or rising share, as renewables face disadvantage

Source: Columbia Business School ([link](#))

(1) Construction by 4 July 2026 = 4 years to completion, after = in service before 2028. (2) EV, Carbon Capture, Energy Storage, Biofuels, Hydrogen and Oil, Gas & Coal's Outlook use EIA's reference case and alternative transportation case. (3) Outlook expectations for solar and wind based on EIA's 2025 AEO, using "Reference" Case and "High Zero-Carbon Technology Cost" Case. Sources: Congress, [One Big Beautiful Bill Act](#) (2025); DOE, [Inflation Reduction Act](#) (2022); Norton Rose Fulbright, [Effects of "One Big Beautiful Bill" On Projects](#) (2025); CKI Analysis (2025). Credit: Mariana Castaño, Ariela Farchi, Nicolas Herrera Isaza, Isabel Hoyos, Hyae Ryung Kim, and [Gernot Wagner](#). Share with attribution: Castaño *et al*, "Climate Impact of One Big Beautiful Bill Act" (15 July 2025).

THIS WAS THE STATUS LAST YEAR

 **Columbia Business School**
Climate Knowledge Initiative

Executive Orders

Energy Related (Abbreviated List)



US Policy

Reliability, Security

Publication	Title	
Jan 2025	Unleashing American Energy	https://www.govinfo.gov/content/pkg/FR-2025-01-29/pdf/2025-01956.pdf
Jan 2025	Declaring a National Energy Emergency	https://www.govinfo.gov/content/pkg/FR-2025-01-29/pdf/2025-02003.pdf
Feb 2025	Establishing the National Energy Dominance Council	https://www.govinfo.gov/content/pkg/FR-2025-02-20/pdf/2025-02928.pdf
Apr 2025	Protecting American Energy From State Overreach	https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06379.pdf
Apr 2025	Reinvigorating America's Beautiful Clean Coal Industry and Amending Executive Order 14241	https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06380.pdf
Apr 2025	Strengthening the Reliability and Security of the United States Electric Grid	https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06381.pdf
Apr 2025	Zero-Based Regulatory Budgeting To Unleash American Energy	https://www.govinfo.gov/content/pkg/FR-2025-04-15/pdf/2025-06466.pdf
May 2025	Reforming Nuclear Reactor Testing at the Department of Energy	https://www.govinfo.gov/content/pkg/FR-2025-05-29/pdf/2025-09799.pdf
Jul 2025	Ending Market Distorting Subsidies for Unreliable, Foreign-Controlled Energy Sources	https://www.govinfo.gov/content/pkg/FR-2025-07-10/pdf/2025-12961.pdf
Dec 2025	Ensuring a National Policy Framework for Artificial Intelligence	https://www.federalregister.gov/documents/2025/12/16/2025-23092/ensuring-a-national-policy-framework-for-artificial-intelligence
Feb 2026	Strengthening United States National Defense With America's Beautiful Clean Coal Power Generation Fleet	https://www.federalregister.gov/documents/2026/02/17/2026-03156/strengthening-united-states-national-defense-with-americas-beautiful-clean-coal-power-generation
Jun 2026	Promoting Advanced Artificial Intelligence Innovation and Security	https://www.federalregister.gov/documents/2026/06/05/2026-11415/promoting-advanced-artificial-intelligence-innovation-and-security

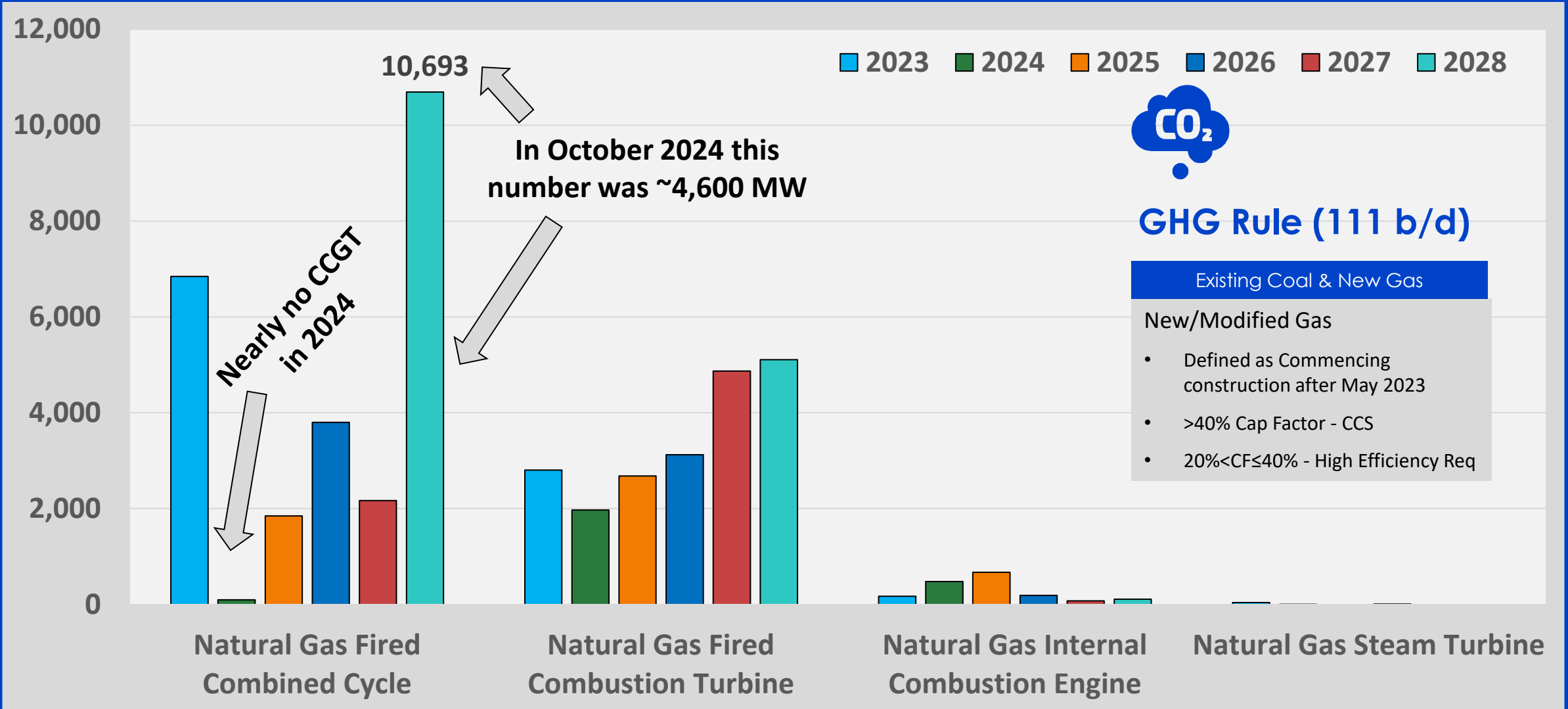
<https://www.federalregister.gov/presidential-documents/executive-orders>

Changing Gas Generation

December 2025 Data

Impacts of Rules

And Demand Growth

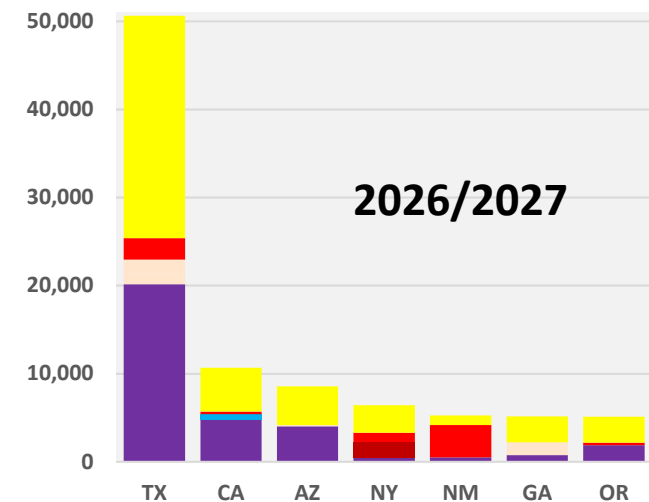
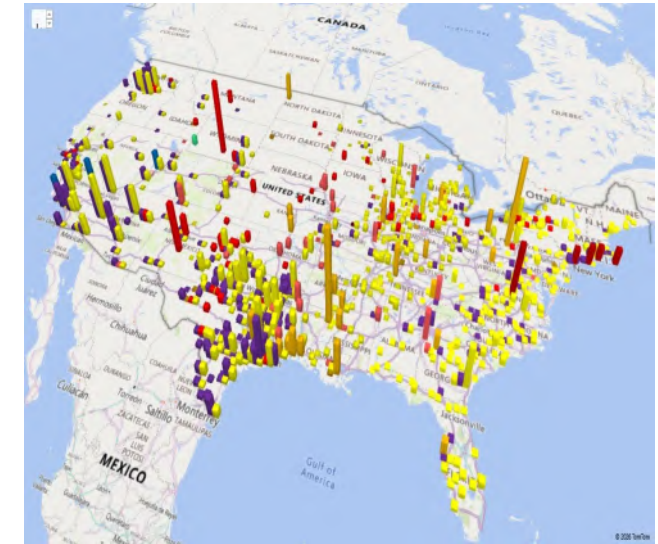
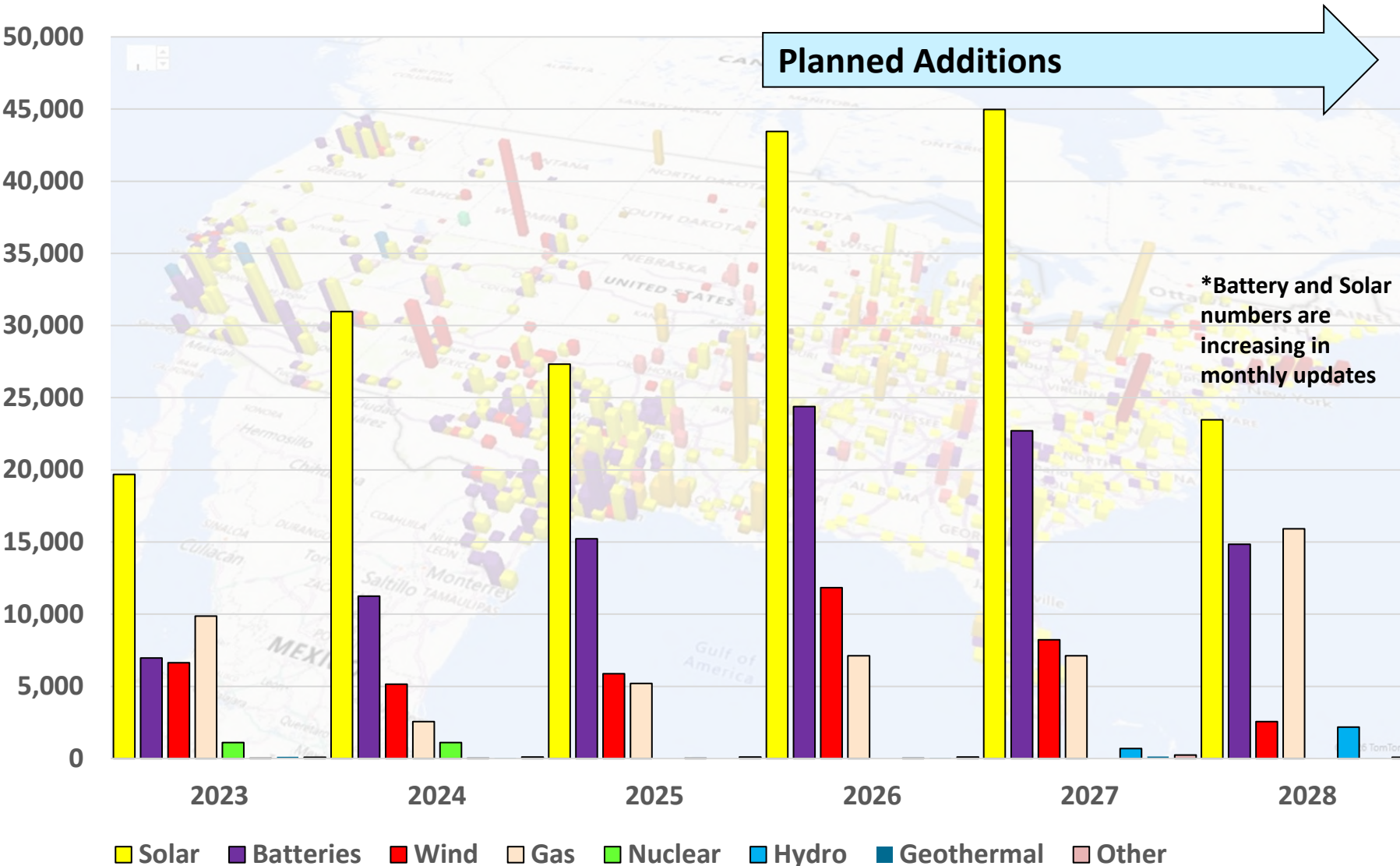


US Additions

EIA 860 Data Generation (December 2025)

Planned and Actuals

Solar and Batteries still Significant in Planned



US Gas Additions

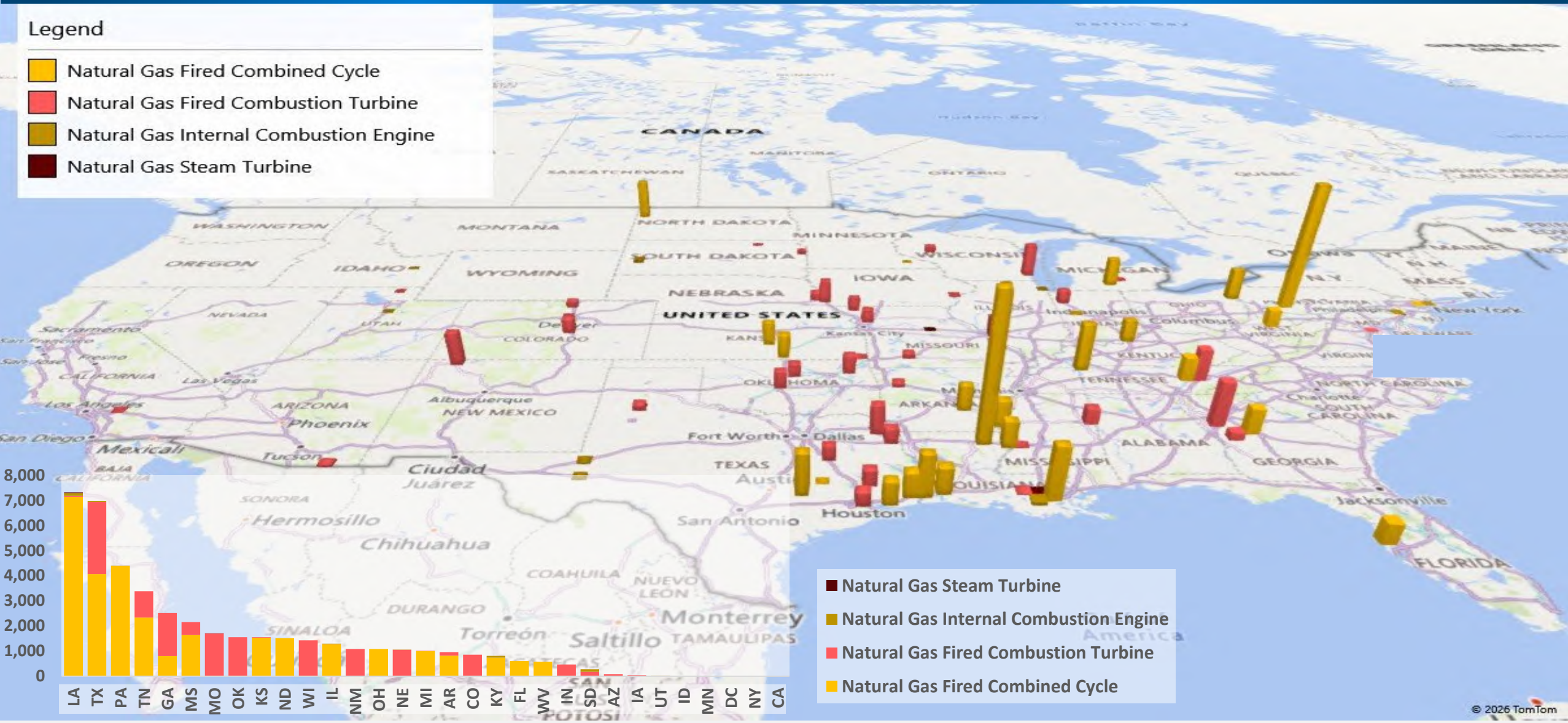
EIA 860 Data Generation

Planned 2026-2031

State by State

Legend

- Natural Gas Fired Combined Cycle
- Natural Gas Fired Combustion Turbine
- Natural Gas Internal Combustion Engine
- Natural Gas Steam Turbine



Gas and Oil Generation

Predominantly Gas

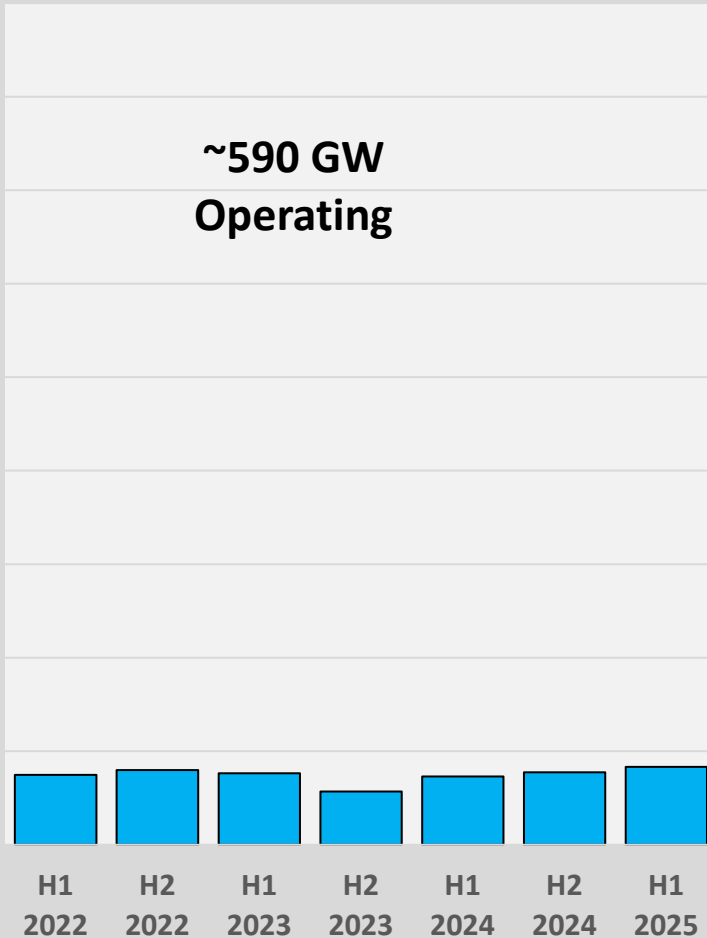
Significant Regional Growth

North America Plans, Western Asia Construction

GW

North America

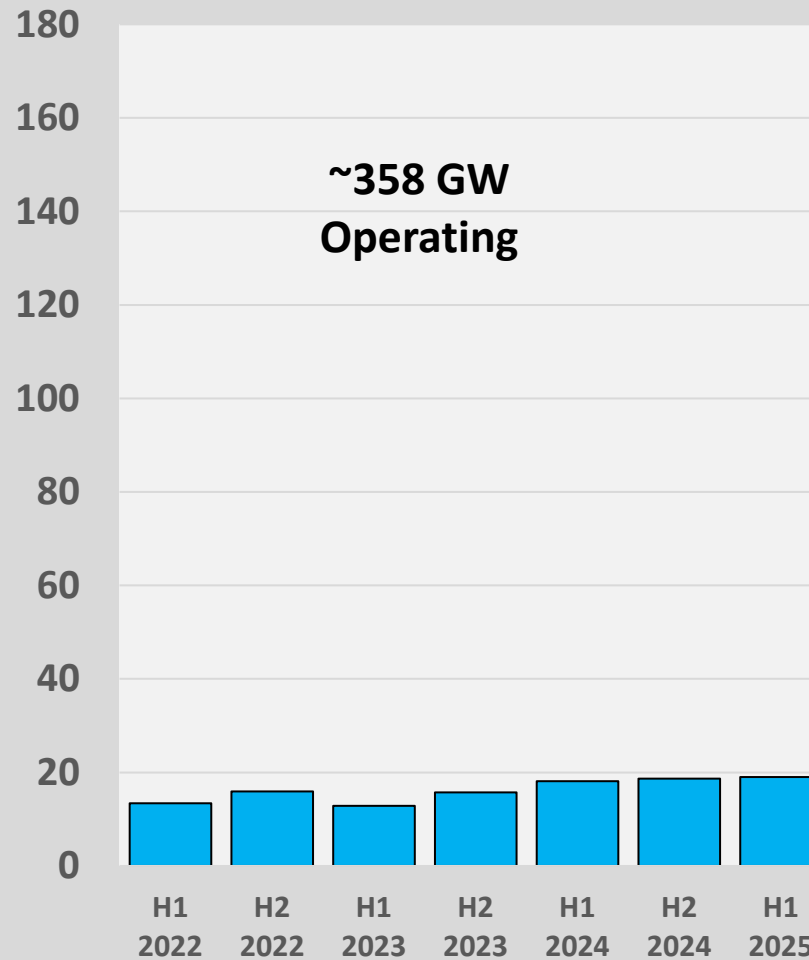
~590 GW
Operating



■ Construction

Europe

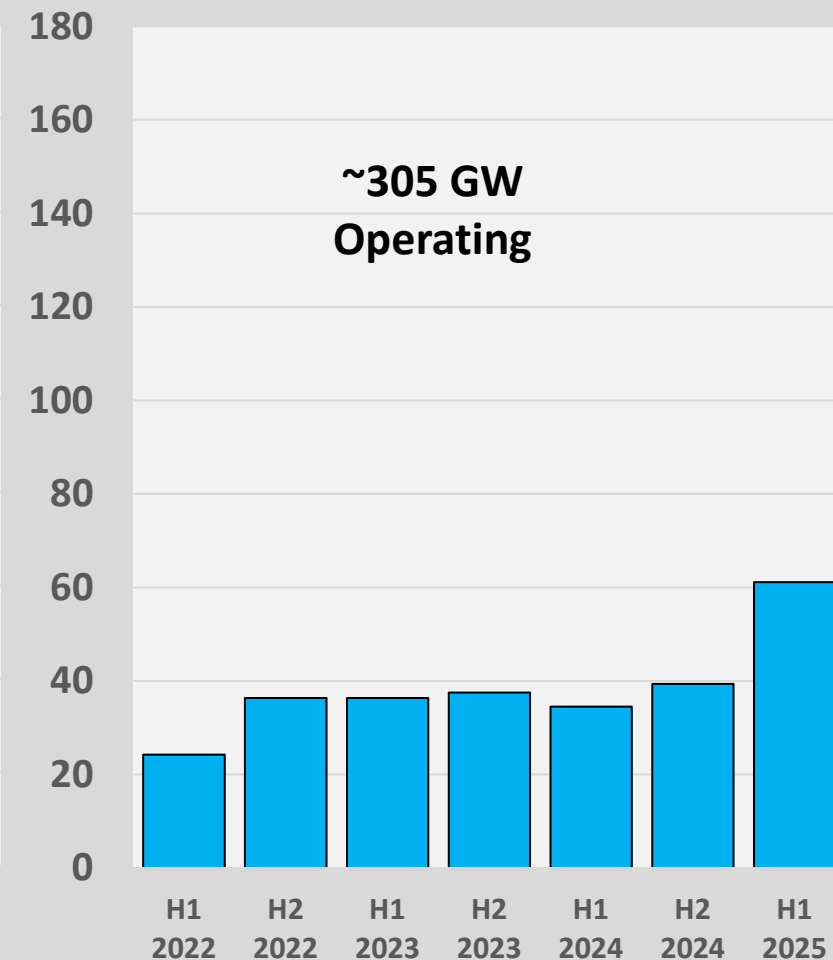
~358 GW
Operating



■ Construction

Western Asia

~305 GW
Operating



■ Construction

Gas and Oil Generation

Predominantly Gas

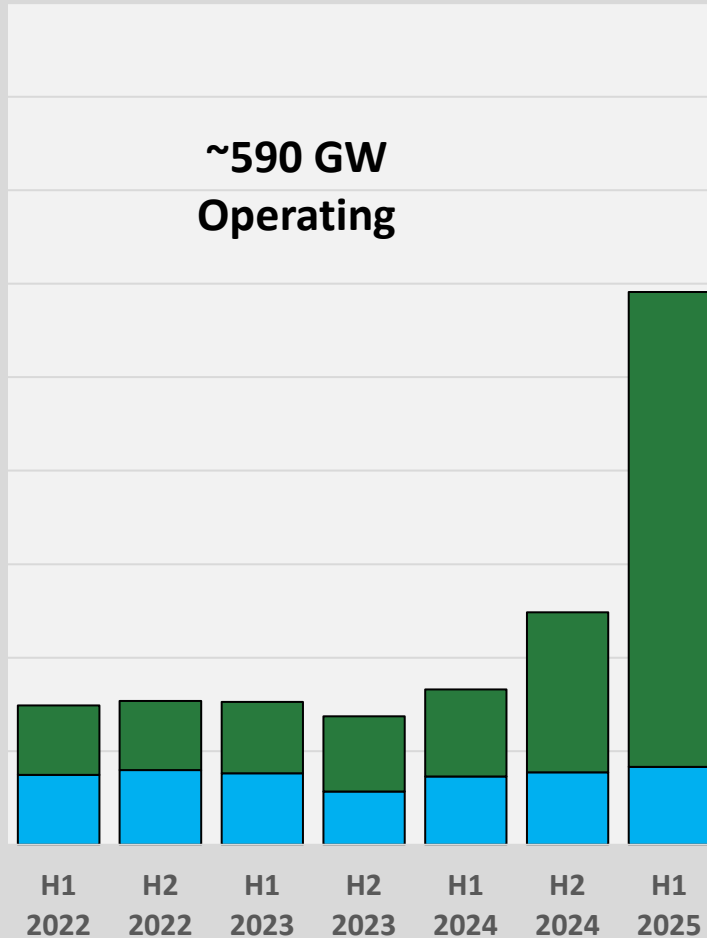
Significant Regional Growth

North America Plans, Western Asia Construction

GW

North America

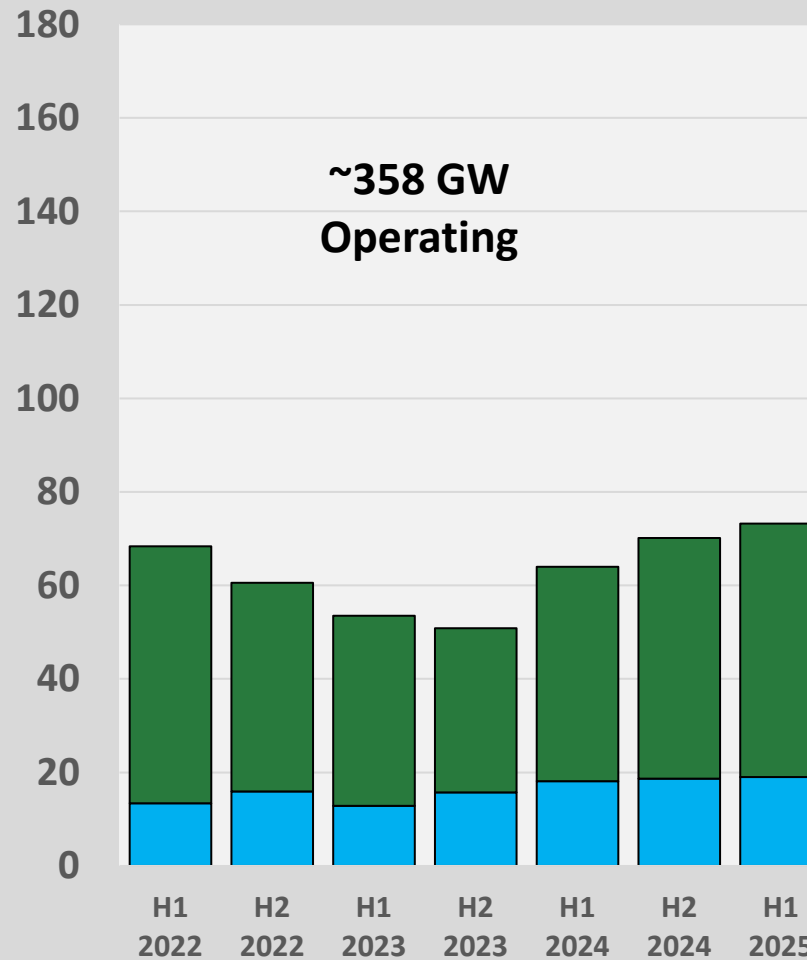
~590 GW
Operating



Construction Pre-construction

Europe

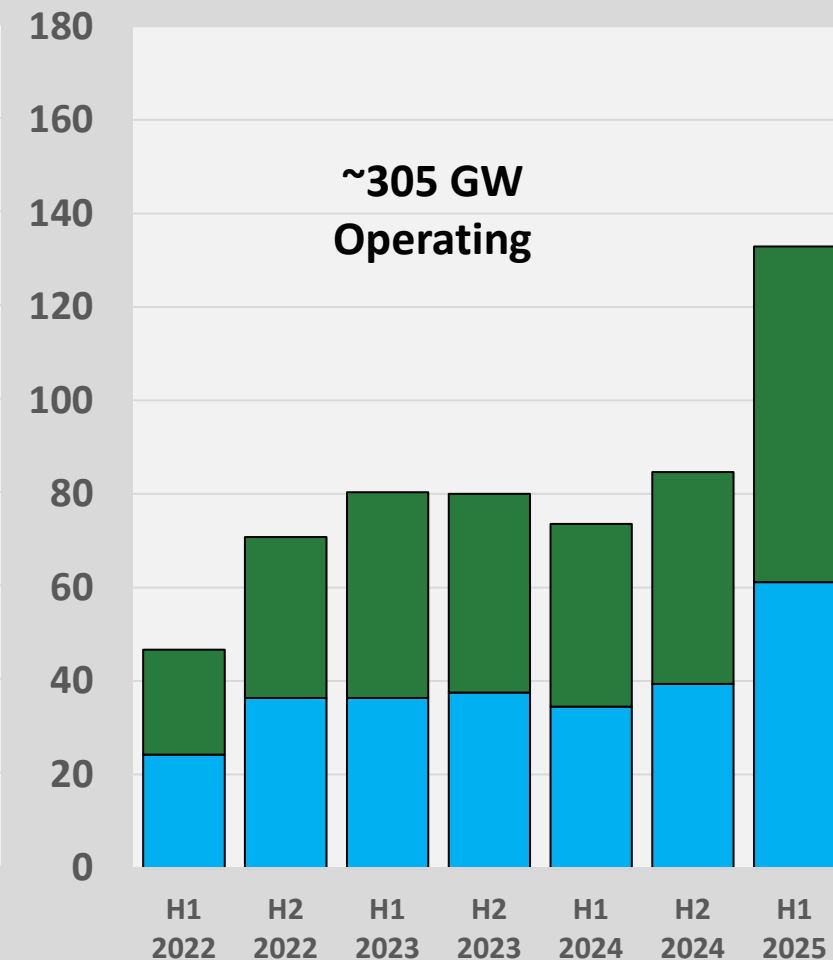
~358 GW
Operating



Construction Pre-construction

Western Asia

~305 GW
Operating



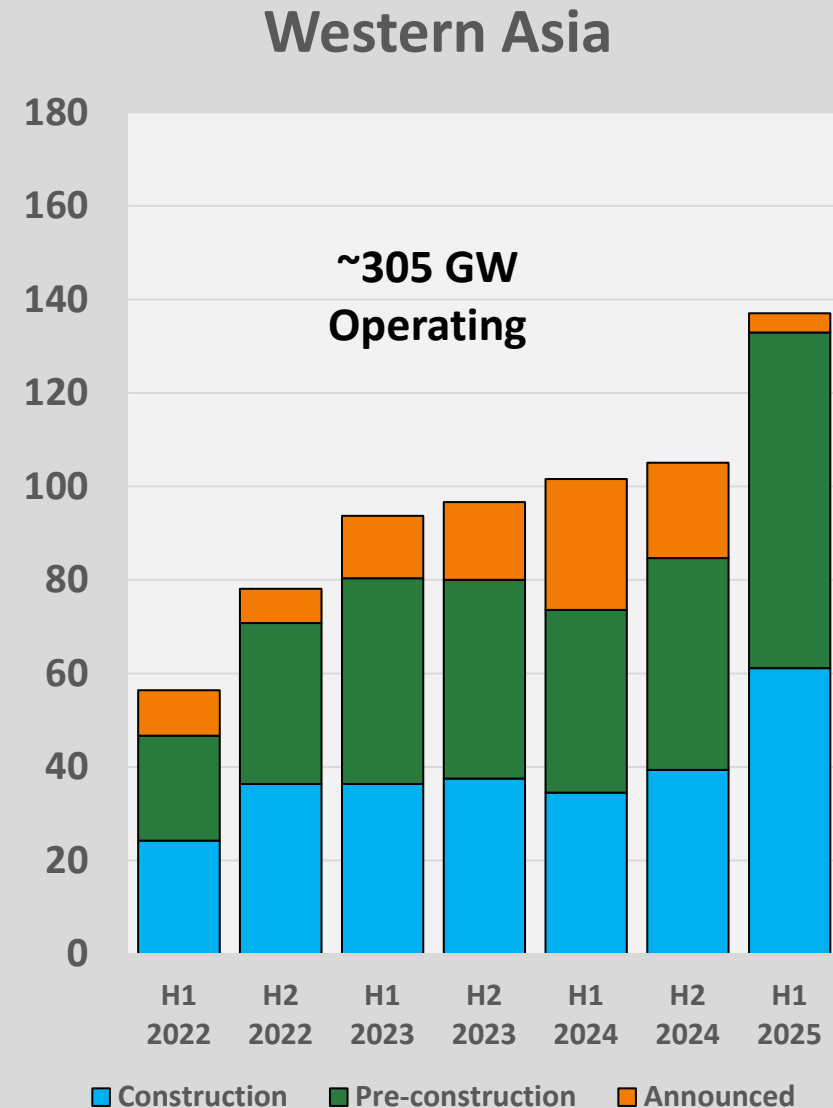
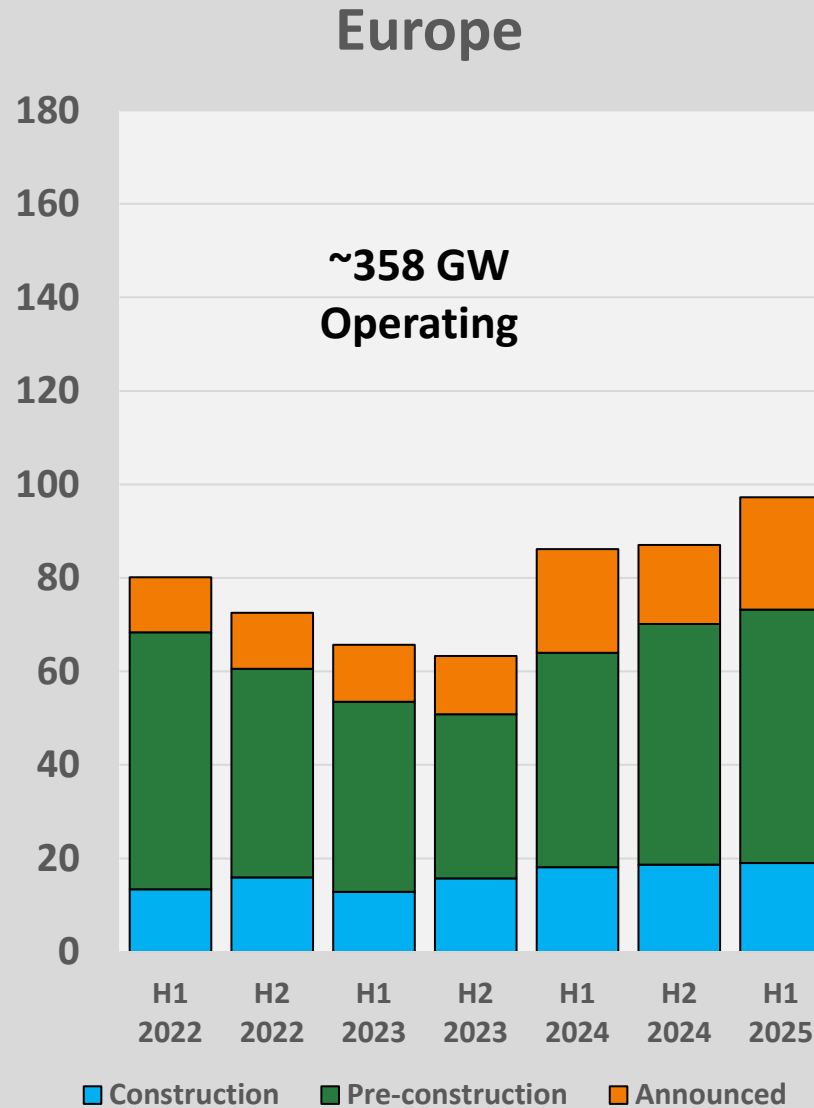
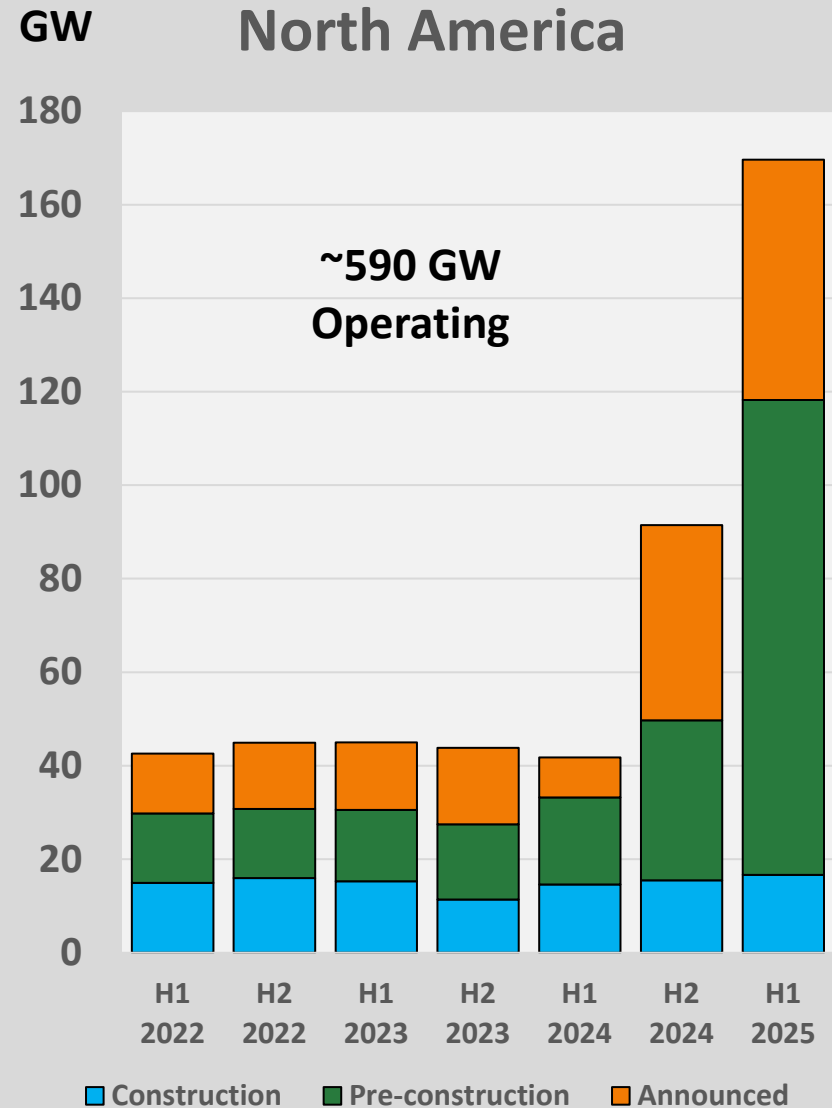
Construction Pre-construction

Gas and Oil Generation

Predominantly Gas

Significant Regional Growth

North America Plans, Western Asia Construction

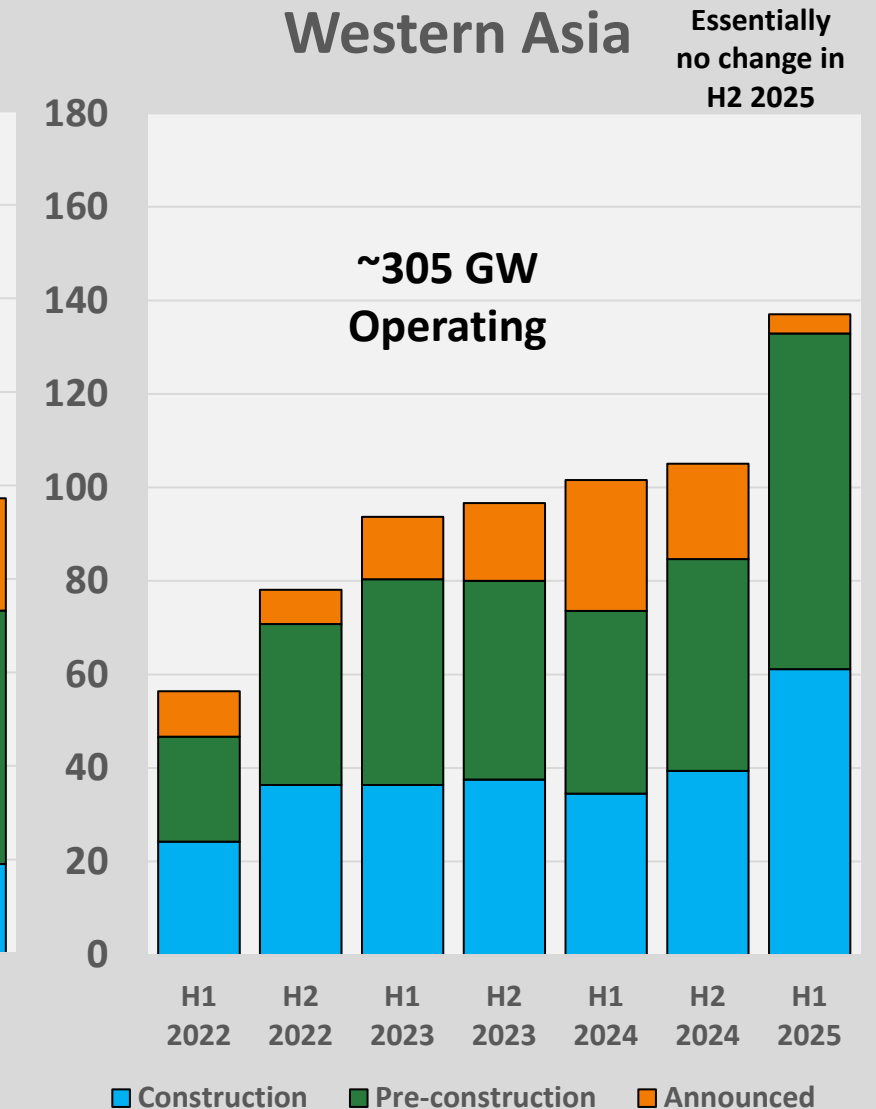
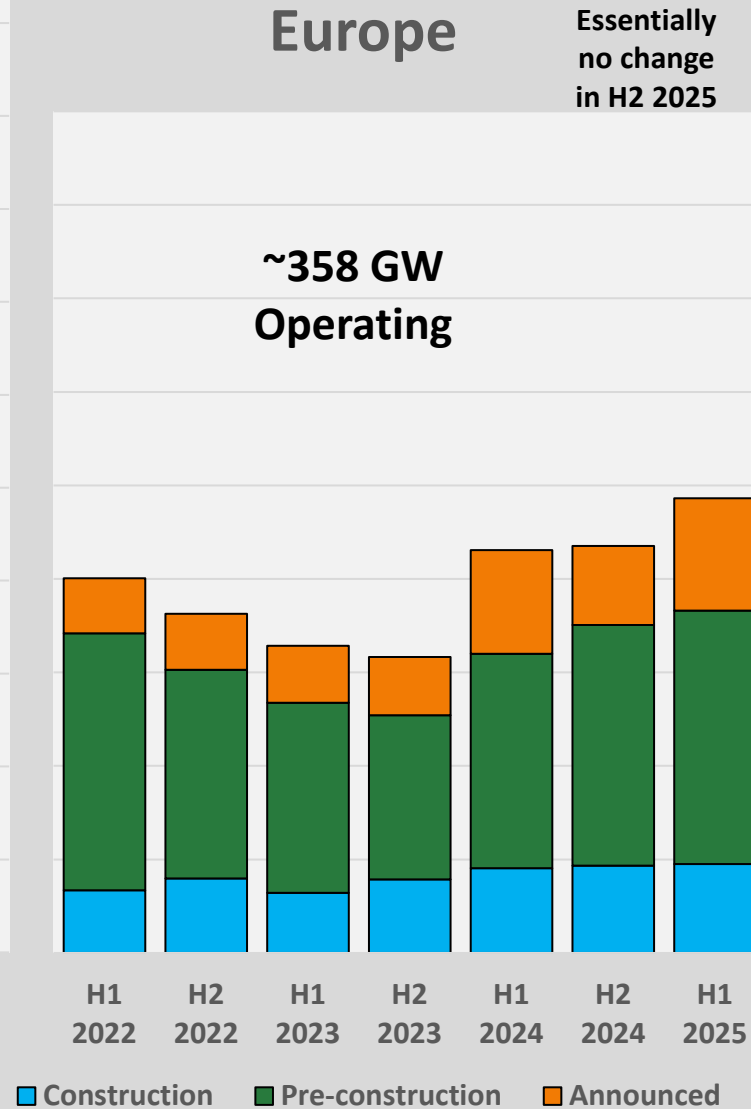
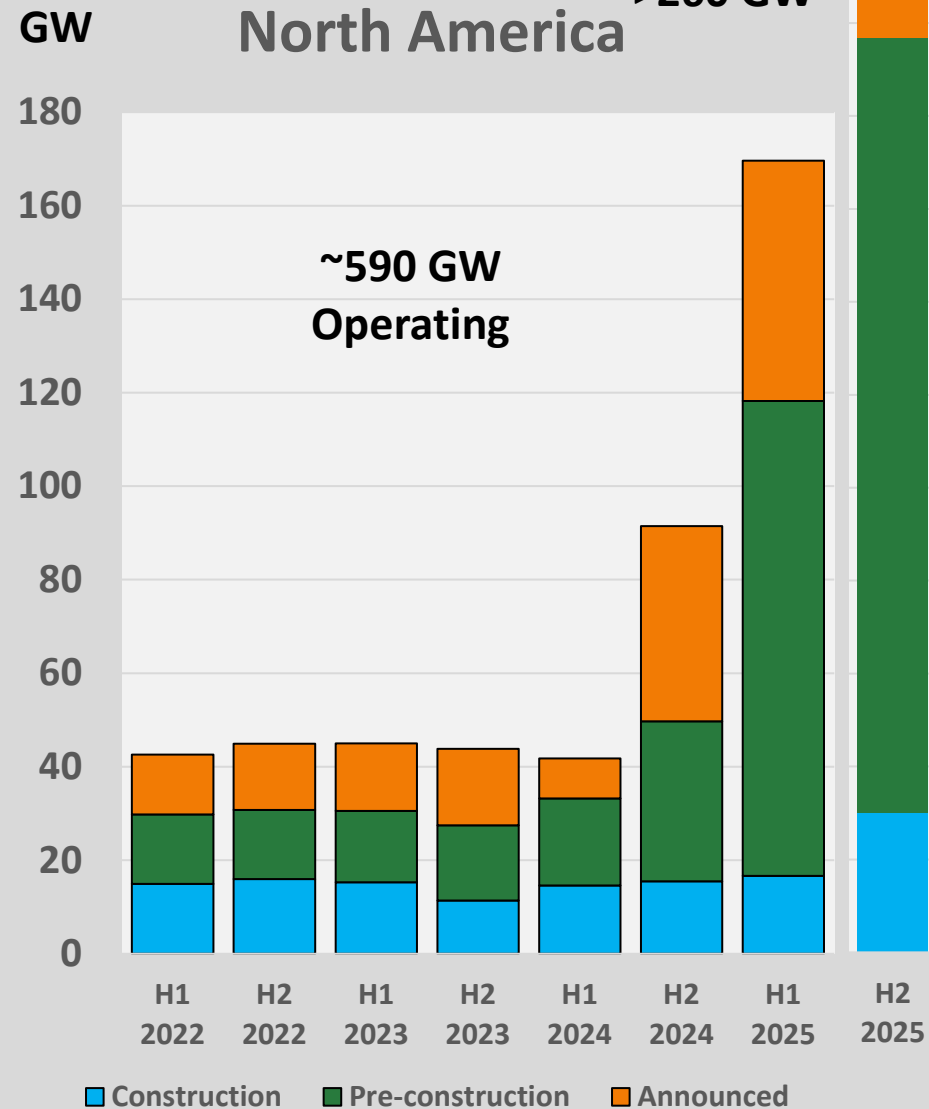


Gas and Oil Generation

Predominantly Gas

Significant Regional Growth

North America Plans, Western Asia Construction



Discussion



Michael Caravaggio

Vice President - Energy Supply
- Reliability, EPRI





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DCFlex Workstreams



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64+

Greenhouse Gas Rules

Proposed Changes

Impacts of Rules

Uncertainty



***Primary approach** is to interpret Section 111 of the Clean Air Act in a way that would essentially end federal regulation*

The Result: If finalized and upheld by courts, this would repeal **all** GHG standards for the power sector and could prevent the EPA from regulating GHGs from other industrial sources in the future

As an **alternative** to the sweeping repeal, the EPA proposed targeted rollbacks of the specific required.

Repeal of CCS Mandates

Ending Gas Co-firing Requirements.



Reverting to "Inside the Fence-line" Measures: The proposal suggests returning to the philosophy of the 2019 "Affordable Clean Energy" (ACE) rule, which only requires modest efficiency improvements at individual plants.

President Trump and Administrator Zeldin Deliver Single Largest Deregulatory Action in U.S. History

Trump Admin Eliminates Obama-Era Endangerment Finding, off-cycle credits, start-stop feature

February 12, 2026

Regulatory Uncertainty

Court Challenges



... It is thus in the national interest to unleash America's affordable and reliable energy and natural resources.

Sec. 4. Revocation of and Revisions to Certain Presidential and Regulatory Actions. (a) The following are revoked and any offices established therein are abolished:

- (i) Executive Order 13990 of January 20, 2021 (Protecting Public Health and the Environment and Restoring Science to Tackle the Climate Crisis);
- (ii) Executive Order 13992 of January 20, 2021 (**Revocation of Certain Executive Orders Concerning Federal Regulation**);
- (iii) Executive Order 14008 of January 27, 2021 (Tackling the Climate Crisis at Home and Abroad);
- (iv) Executive Order 14007 of January 27, 2021 (President's Council of Advisors on Science and Technology);
- (v) Executive Order 14013 of February 4, 2021 (Rebuilding and Enhancing Programs to Resettle Refugees and Planning for the Impact of Climate Change on Migration);
- (vi) Executive Order 14027 of May 7, 2021 (Establishment of the Climate Change Support Office);
- (vii) Executive Order 14030 of May 20, 2021 (Climate-Related Financial Risk);
- (viii) Executive Order 14037 of August 5, 2021 (Strengthening American Leadership in Clean Cars and Trucks);
- (ix) Executive Order 14057 of December 8, 2021 (Catalyzing Clean Energy Industries and Jobs Through Federal Sustainability);
- (x) Executive Order 14072 of April 22, 2022 (Strengthening the Nation's Forests, Communities, and Local Economies);
- (xi) Executive Order 14082 of September 12, 2022 (Implementation of the Energy and Infrastructure Provisions of the Inflation Reduction Act of 2022); and
- (xii) Executive Order 14096 of April 21, 2023 (Revitalizing Our Nation's Commitment to Environmental Justice for All).

<https://www.govinfo.gov/content/pkg/FR-2025-01-29/pdf/2025-01956.pdf>

Unleashing
American Energy
14154

By the authority vested in me as President by the Constitution and the laws of the United States of America, including the National Emergencies Act (50 U.S.C. 1601 *et seq.*) (“NEA”), and section 301 of title 3, United States Code, it is hereby ordered:

Section 1. Purpose. The energy and critical minerals (“energy”) identification, leasing, development, production, transportation, refining, and generation capacity of the United States are all far too inadequate to meet our Nation’s needs. We need a reliable, diversified, and affordable supply of energy to drive our Nation’s manufacturing, transportation, agriculture, and defense industries, and to sustain the basics of modern life and military preparedness. Caused by the harmful and shortsighted policies of the previous administration, our Nation’s inadequate energy supply and infrastructure causes and makes worse the high energy prices that devastate Americans, particularly those living on low- and fixed-incomes. I hereby declare a national emergency.

<https://www.govinfo.gov/content/pkg/FR-2025-01-29/pdf/2025-02003.pdf>

Declaring a
National Energy
Emergency
14156

- **Sec. 4. Functions.** (a) The Chair shall convene and preside over meetings of the Council, in consultation with the Office of the Chief of Staff, provided that in his absence the Vice Chair shall preside. (b)
- The Council shall: (i) advise the President on how best to exercise his authority to produce more energy to make America energy dominant; (ii) advise the President on improving the processes for permitting, production, generation, distribution, regulation, transportation, and export of all forms of American energy, including critical minerals; (iii) provide to the President a recommended National Energy Dominance Strategy to produce more energy that includes long-range goals for achieving energy dominance by cutting red tape, enhancing private sector investments across all sectors of the energy-producing economy, focusing on innovation, and seeking to eliminate longstanding, but unnecessary, regulation; (iv) advise and assist the President in facilitating cooperation among the Federal Government and domestic private sector energy partners; and (v) advise the President on facilitating consistency in energy production policies included in the Strategy developed under subsection (b)(iii) of this section.

<https://www.govinfo.gov/content/pkg/FR-2025-02-20/pdf/2025-02928.pdf>

Establishing the National Energy Dominance Council 14213

The Secretary of the Interior shall serve as Chair of the Council. The Secretary of Energy shall serve as Vice Chair of the Council.

- **Sec. 2. State Laws and Causes of Action.**

- (a) The Attorney General, in consultation with the heads of appropriate executive departments and agencies, shall identify all State and local laws, regulations, causes of action, policies, and practices (collectively, State laws) burdening the identification, development, siting, production, or use of domestic energy resources that are or may be unconstitutional, preempted by Federal law, or otherwise unenforceable. The Attorney General shall prioritize the identification of any such State laws purporting to address “climate change” or involving “environmental, social, and governance” initiatives, “environmental justice,” carbon or “greenhouse gas” emissions, and funds to collect carbon penalties or carbon taxes.
- (b) The Attorney General shall expeditiously take all appropriate action to stop the enforcement of State laws and continuation of civil actions identified in subsection (a) of this section that the Attorney General determines to be illegal.
- (c) Within 60 days of the date of this order, the Attorney General shall submit a report to the President, through the Counsel to the President, regarding actions taken under subsection (b) of this section. The Attorney General shall also recommend any additional Presidential or legislative action necessary to stop the enforcement of State laws identified in subsection (a) of this section that the Attorney General determines to be illegal or otherwise fulfill the purpose of this order.

Protecting
American Energy
From State
Overreach
14260

4/14/2025

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06379.pdf>

Sec. 6. Supporting American Coal as an Energy Source.

- (a) Within 30 days of the date of this order, the Administrator of the Environmental Protection Agency, the Secretary of Transportation, the Secretary of the Interior, the Secretary of Energy, the Secretary of Labor, and the Secretary of the Treasury shall identify any guidance, regulations, programs, and policies within their respective executive department or agency that seek to transition the Nation away from coal production and electricity generation.
- (b) (c) Agencies that are empowered to make loans, loan guarantees, grants, equity investments, or to conclude offtake agreements, both domestically and abroad, shall, to the extent permitted by law, take steps to rescind any policies or regulations seeking to or that actually discourage investment in coal production and coal-fired electricity generation, such as the 2021 U.S. Treasury Fossil Fuel Energy Guidance for Multilateral Development Banks rescinded by the Department of the Treasury and similar policies or regulations.

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06380.pdf>

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Sec. 10. Powering Artificial Intelligence Data Centers.

- (a) For the purposes of this order, “artificial intelligence” or “AI” has the meaning set forth in 15 U.S.C. 9401(3).
- (b) Within 60 days of the date of this order, the Secretary of the Interior, Secretary of Commerce, and the Secretary of Energy shall identify regions where coal-powered infrastructure is available and suitable for supporting AI data centers; assess the market, legal, and technological potential for expanding coal-based infrastructure to power data centers to meet the electricity needs of AI and high-performance computing operations; and submit a consolidated summary report with their findings and proposals to the Chair of the NEDC, the Assistant to the President for Science and Technology and the Special Advisor for AI and Crypto.

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06380.pdf>

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Sec. 11. Acceleration of Coal Technology.

(a) The Secretary of Energy shall take all necessary actions, consistent with applicable law, to accelerate the development, deployment, and commercialization of coal technologies including, but not limited to, utilizing all available funding mechanisms to support the expansion of coal technology, including technologies that utilize coal and coal byproducts such as building materials, battery materials, carbon fiber, synthetic graphite, and printing materials, as well as updating coal feedstock for power generation and steelmaking.

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06380.pdf>

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Section 1. Purpose.

The United States is experiencing an unprecedented surge in electricity demand driven by rapid technological advancements, including the expansion of artificial intelligence data centers and an increase in domestic manufacturing. This increase in demand, coupled with existing capacity challenges, places a significant strain on our Nation's electric grid. Lack of reliability in the electric grid puts the national and economic security of the American people at risk. The United States' ability to remain at the forefront of technological innovation depends on a reliable supply of energy from all available electric generation sources and the integrity of our Nation's electric grid.

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06381.pdf>

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Sec. 2. Policy.

It is the policy of the United States to ensure the reliability, resilience, and security of the electric power grid. It is further the policy of the United States that in order to ensure adequate and reliable electric generation in America, to meet growing electricity demand, and to address the national emergency declared pursuant to Executive Order 14156 of January 20, 2025 (Declaring a National Energy Emergency), our electric grid must utilize all available power generation resources, particularly those secure, redundant fuel supplies that are capable of extended operations.

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06381.pdf>

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Sec. 3. Addressing Energy Reliability and Security with Emergency Authority.

(c) The Secretary of Energy shall establish a process by which the methodology described in subsection (b) of this section, and any analysis and results it produces, are assessed on a regular basis, and a protocol to identify which generation resources within a region are critical to system reliability. This protocol shall additionally: (i) include all mechanisms available under applicable law, including section 202(c) of the Federal Power Act, to ensure any generation resource identified as critical within an at-risk region is appropriately retained as an available generation resource within the at-risk region; and (ii) prevent, as the Secretary of Energy deems appropriate and consistent with applicable law, including section 202 of the Federal Power Act, an identified generation resource in excess of 50 megawatts of nameplate capacity from leaving the bulk-power system or converting the source of fuel of such generation resource if such conversion would result in a net reduction in accredited generating capacity, as determined by the reserve margin methodology developed under subsection (b) of this section.

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Coal to Gas?

<https://www.govinfo.gov/content/pkg/FR-2025-04-14/pdf/2025-06381.pdf>

- This regime of governance-by-regulator has imposed particularly severe costs on energy production, where innovation is critical. The net result is an energy landscape perpetually trapped in the 1970s. By rescinding outdated regulations that serve as a drag on progress, we can stimulate innovation and deliver prosperity to everyday Americans.
- This order directs certain agencies to incorporate a sunset provision into their regulations governing energy production to the extent permitted by law, thus compelling those agencies to reexamine their regulations periodically to ensure that those rules serve the public good.
- Covered Agencies and Regulations. (a) This order applies to the following agencies and their subcomponents: the Environmental Protection Agency (EPA); the Department of Energy (DoE); the Federal Energy Regulatory Commission (FERC); and the Nuclear Regulatory Commission (NRC) ...
- (b) The sunset rule shall provide that each Covered Regulation in effect on the date of this order shall have a Conditional Sunset Date of 1 year after the effective date of the sunset rule, subject to the process set forth in subsection (d) of this section. Unless the extension condition specified in subsection (d) of this section is satisfied, agencies will treat Covered Regulations as ceasing to be effective on that date for all purposes. An agency shall not take any action to enforce such an ineffective regulation and, to the maximum extent permitted by law, shall remove it from the Code of Federal Regulations.

<https://www.govinfo.gov/content/pkg/FR-2025-04-15/pdf/2025-06466.pdf>

Zero-Based
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Not more than 5
years for Amended
Sunset Dates