

An American flag is shown waving on a tall pole in the foreground. In the background, the White House is visible under a clear blue sky with some light clouds.

International Fueling of the New Digital Age: *An Overview of the Geopolitical & Policy Context as the World Moves into a New Digital Age*

Michael J. Nasi
Partner, Jackson Walker LLP

June 13, 2026
Energy Council, Regina Saskatchewan

PRESENTATION ROADMAP

1. Geopolitical Energy Security Context
2. Global Demand for Digital & Energy Infrastructure
3. U.S. Domestic Demand Outlook & State of the Grid
4. U.S. Energy Policy Response
5. U.S. Environmental Policy Context





1. Geopolitical Energy Security Context

The Recent U.S. Energy Policy Shift

Energy Transition

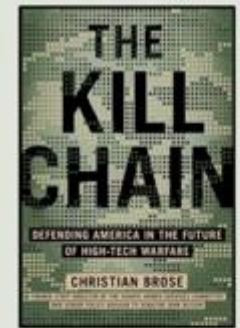
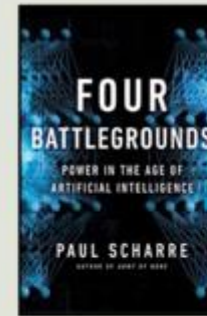
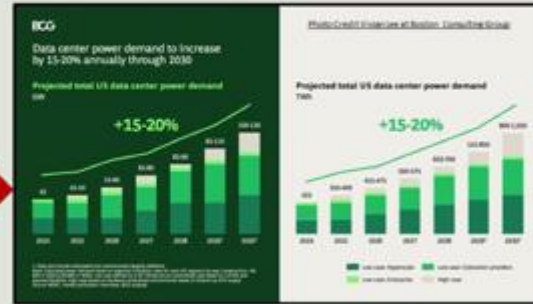
- Executive Order (January 27, 2021)
 - *Tackling the Climate Crisis at Home and Abroad*
 - *“Putting the **Climate Crisis at the Center of United States Foreign Policy and National Security**”*
- America’s National Security Strategy (October 12, 2022)
 - “Climate” is defined as “the greatest and potentially existential for all nations”
 - “Combatting the climate crisis, bolstering our energy security, and **hastening the clean energy transition is integral to our industrial strategy**, economic growth, and security. Events like Russia’s war of aggression against Ukraine have made clear the urgent need to **accelerate the transition away from fossil fuels**”

Energy Dominance

- Executive Order (January 20, 2025)
 - *“Unleashing American Energy”*
 - To **encourage energy exploration and production** on Federal lands and waters, including on the Outer Continental Shelf, in order to meet the needs of our citizens and **solidify the United States as a global energy leader long into the future**
 - To protect the United States’s **economic and national security and military preparedness by ensuring that an abundant supply of reliable energy is readily accessible** in every State and territory of the Nation

Digital Crossroads: Energy & Geopolitical Security

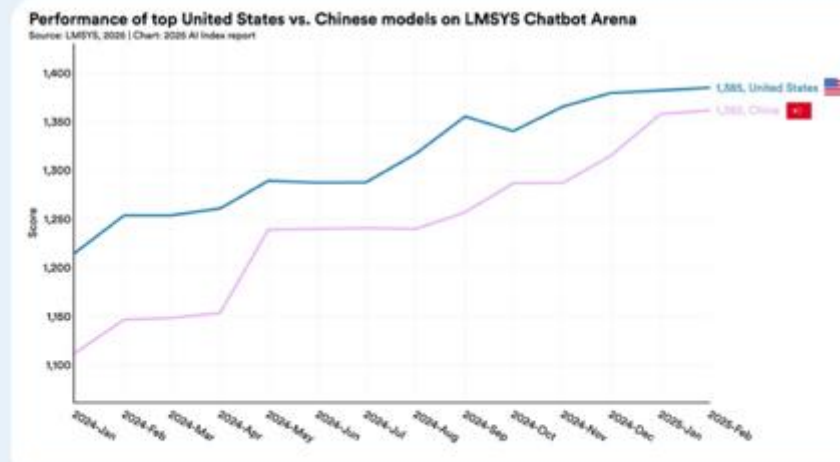
Data Centers & AI Power Demand & National Security



4. The U.S. still leads in producing top AI models—but China is closing the performance gap.

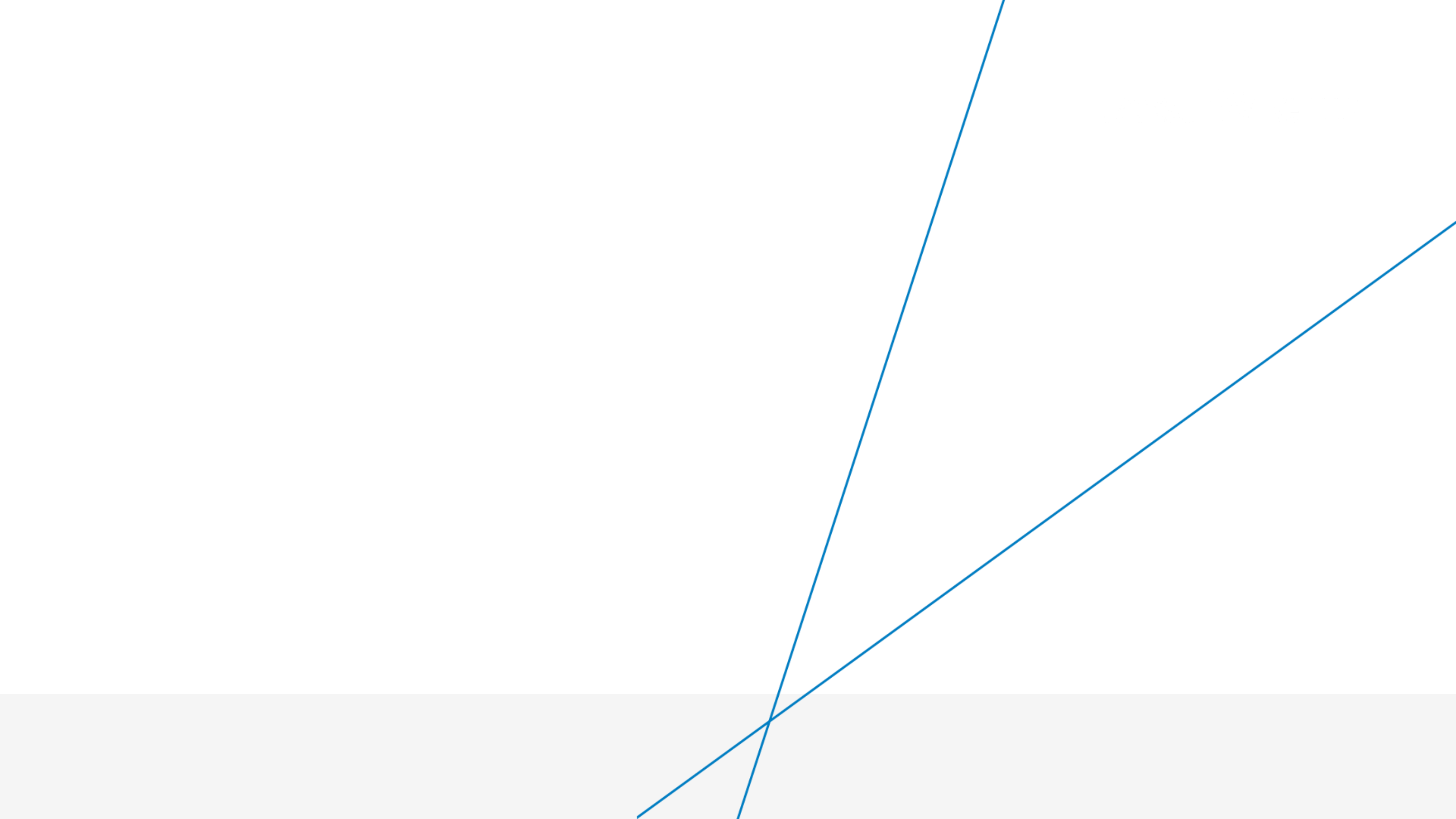
In 2024, U.S.-based institutions produced 40 notable AI models, significantly outpacing China's 15 and Europe's three. While the U.S. maintains its lead in quantity, Chinese models have rapidly closed the quality gap: performance differences on major benchmarks such as MMLU and HumanEval shrank from double digits in 2023 to near parity in 2024. Meanwhile, China continues to lead in AI publications and patents. At the same time, model development is increasingly global, with notable launches from regions such as the Middle East, Latin America, and Southeast Asia.

Source: <https://hai.stanford.edu/ai-index/2025-ai-index-report>



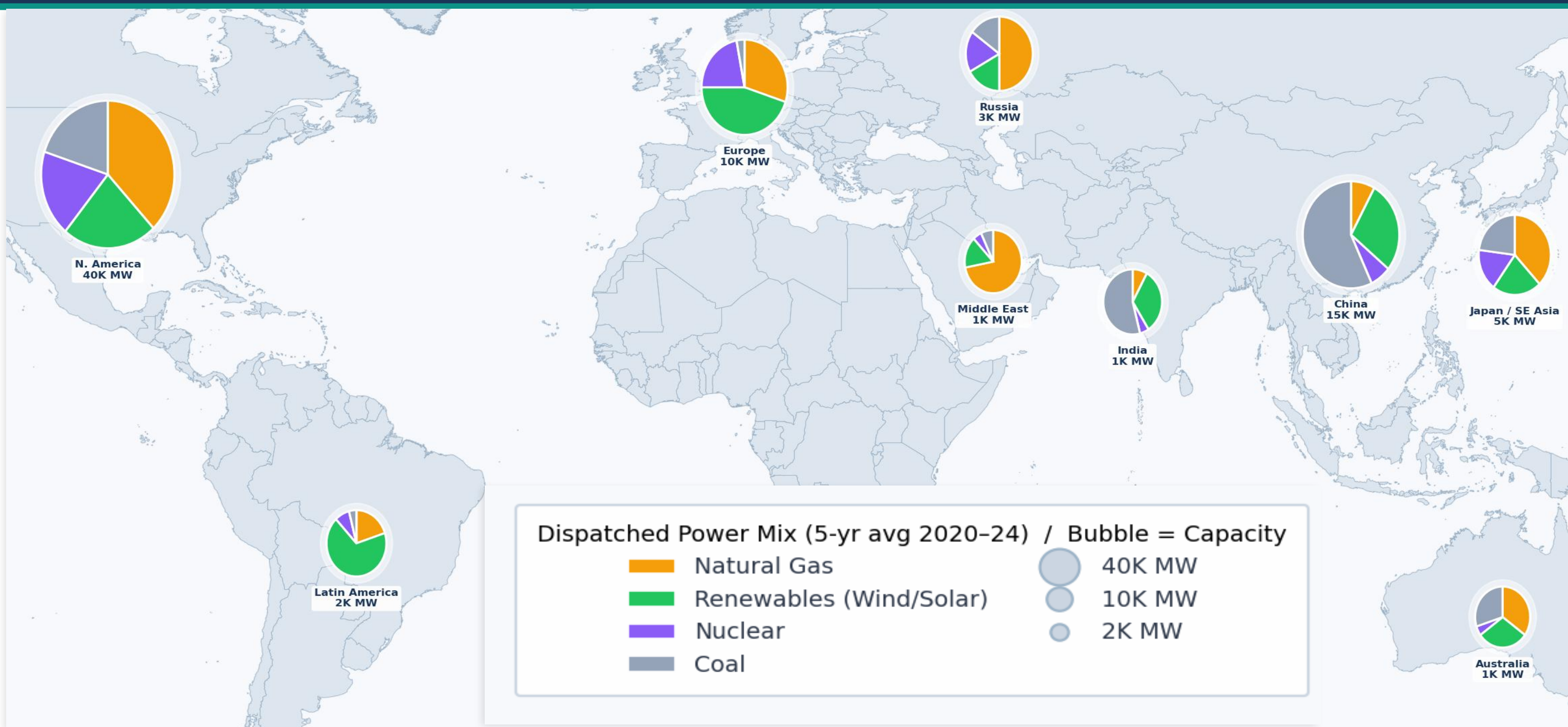
In the national security context, this will primarily mean improving how, and how fast, militaries and intelligence agencies can use data and make decisions. AI will enable better threat detection, giving humans more time to react; let militaries conduct more detailed and realistic planning exercises; shorten crisis response times; and streamline essential back-end processes like finance and logistics.

Source: Foreign Affairs. Link: [Here](#)



ALLIES & ADVERSARIES IN THE GLOBAL AI RACE (& what type of power they rely on)

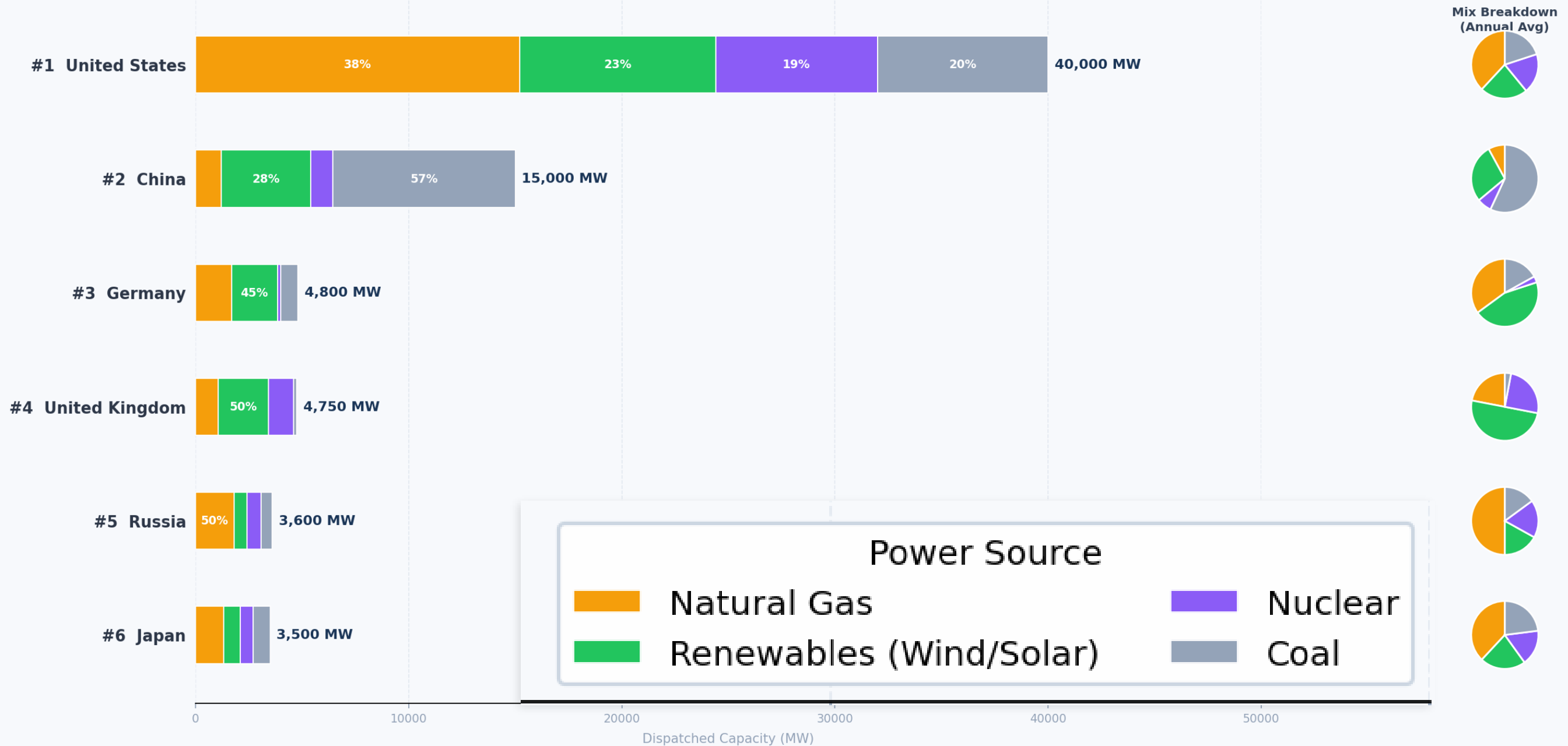
Bubble size $\propto$ deployed hyperscale capacity (MW) · Pie segments = actual dispatched electricity by source · 20-25 average



TOP 6 HYPERSCALE NATIONS (break down of power dispatch)

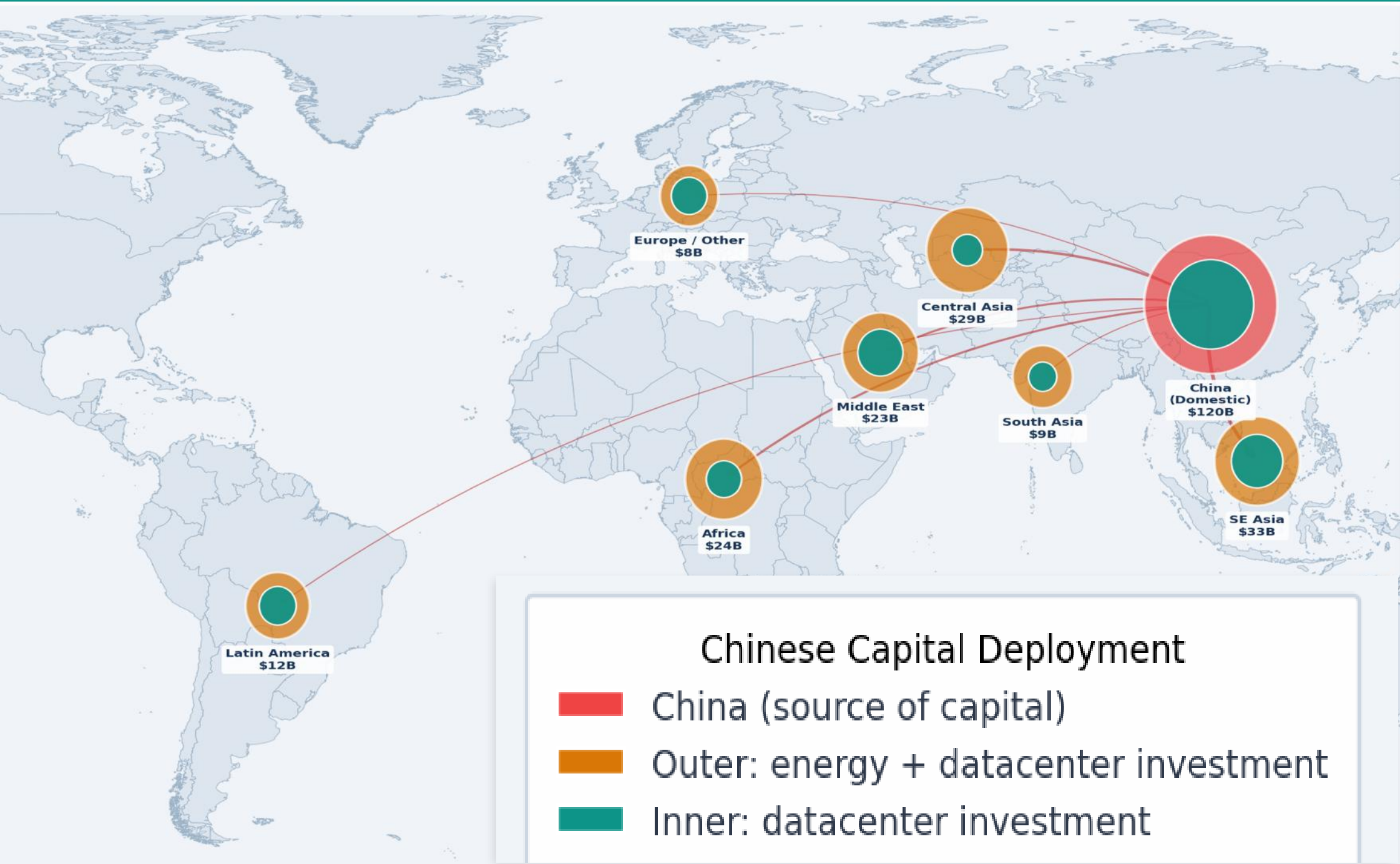
Ranked by total megawatts of actual dispatched electricity to hyperscale datacenters · 2025 estimates

KEY INSIGHT | US = ~54% of global hyperscale capacity · China: coal-dominated (57%) · Europe & UK: clean-heavy, >45% renewables · Russia: gas-dominant (50%) · 5-yr avg 2020-24



CHINESE GLOBAL ENERGY/DIGITAL INFRASTRUCTURE INVESTMENT

Bubble size = total capital deployed (\$B) · Teal inner = datacenter investment · Amber outer = energy generation · Arrows = capital flows · 2025



CHINESE INVESTMENT AT A GLANCE

\$213.5B

Total Engagement 2025

\$94B

Energy & Power Generation
(43% of total — matches outer circles)

\$70B

AI Datacenter Build-Out
(matches inner teal circles)

24 GW

New Power Capacity
Installed Overseas 2025

+19%

YoY Deal Growth 2024-2025

THE UNTOLD STORY OF MASS URBANIZATION

100 Million People Moving to Urban Centers EVERY YEAR FOR 30 YEARS

In all human history we have reached 3.5 billion of urban settlers, and in the next 30 years we are going to have 3 billion more. . . what we have done in all human history, we nearly will do in the next 30 to 40 years. - UN Settlement Program

Shanghai – 1990



TODAY



THIS WILL HAPPEN 120 MORE TIMES IN THE NEXT 3 DECADES!



The Last Time We Added Three Billion People to Cities (1950-2010)



- Oil demand grew from 10 million b/d to 88 million b/d
- Natural gas use rose from 8 Tcf to 113 Tcf
- Coal demand increased from 2 billion to 7.1 billion tons
- Steel consumption increased from 200 to 1,400 million tons

WHO WILL SUPPLY THIS OIL, GAS, COAL, & STEEL?
& this time there will also be a massive expansion in batteries & critical minerals, all of which are dominated by the Chinese.

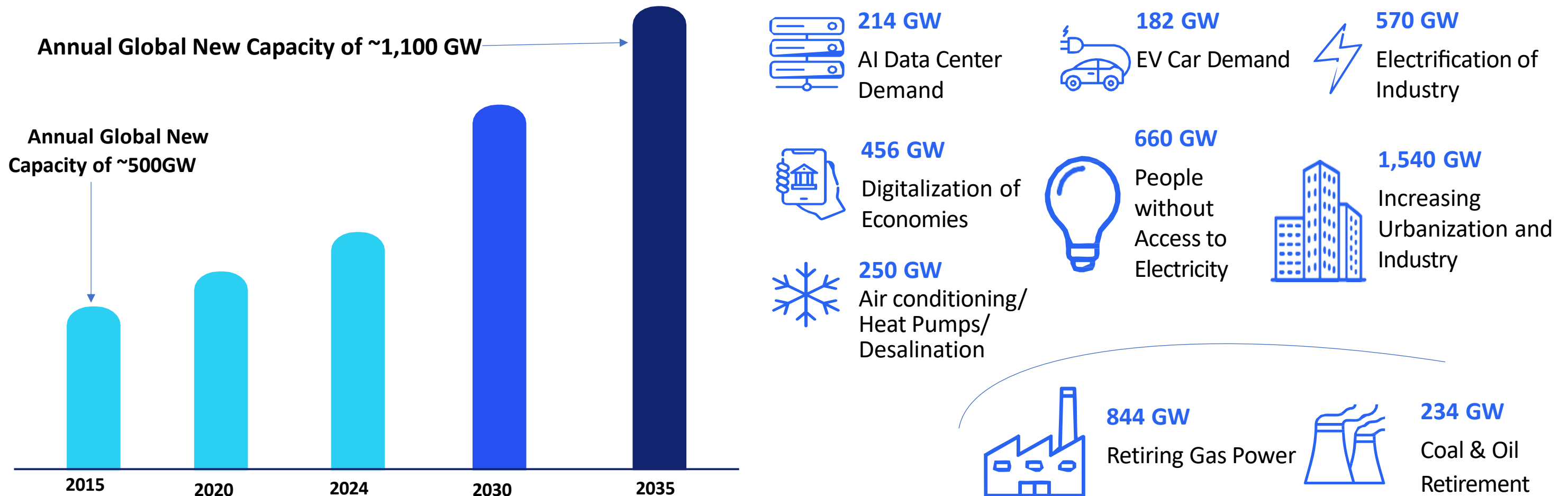
2. Global Race to Meet the Electricity Demands of the Digital Age



GLOBAL POWER DEMAND GROWTH

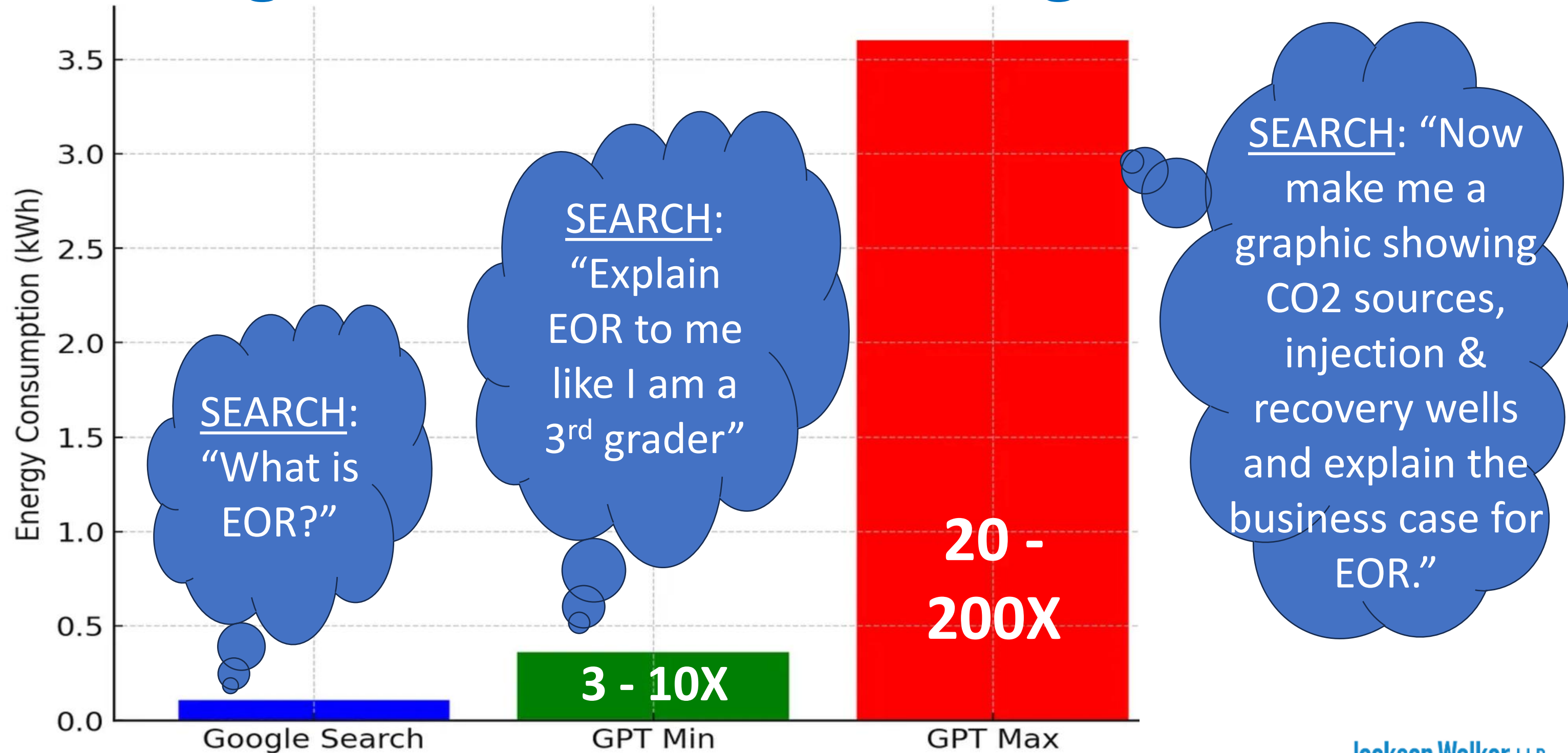
Annual global power capacity expansion doubling to meet new electric / digital age

Transition to a more electrified future, on top of the usual fundamentals, exponentially driving long-term growth



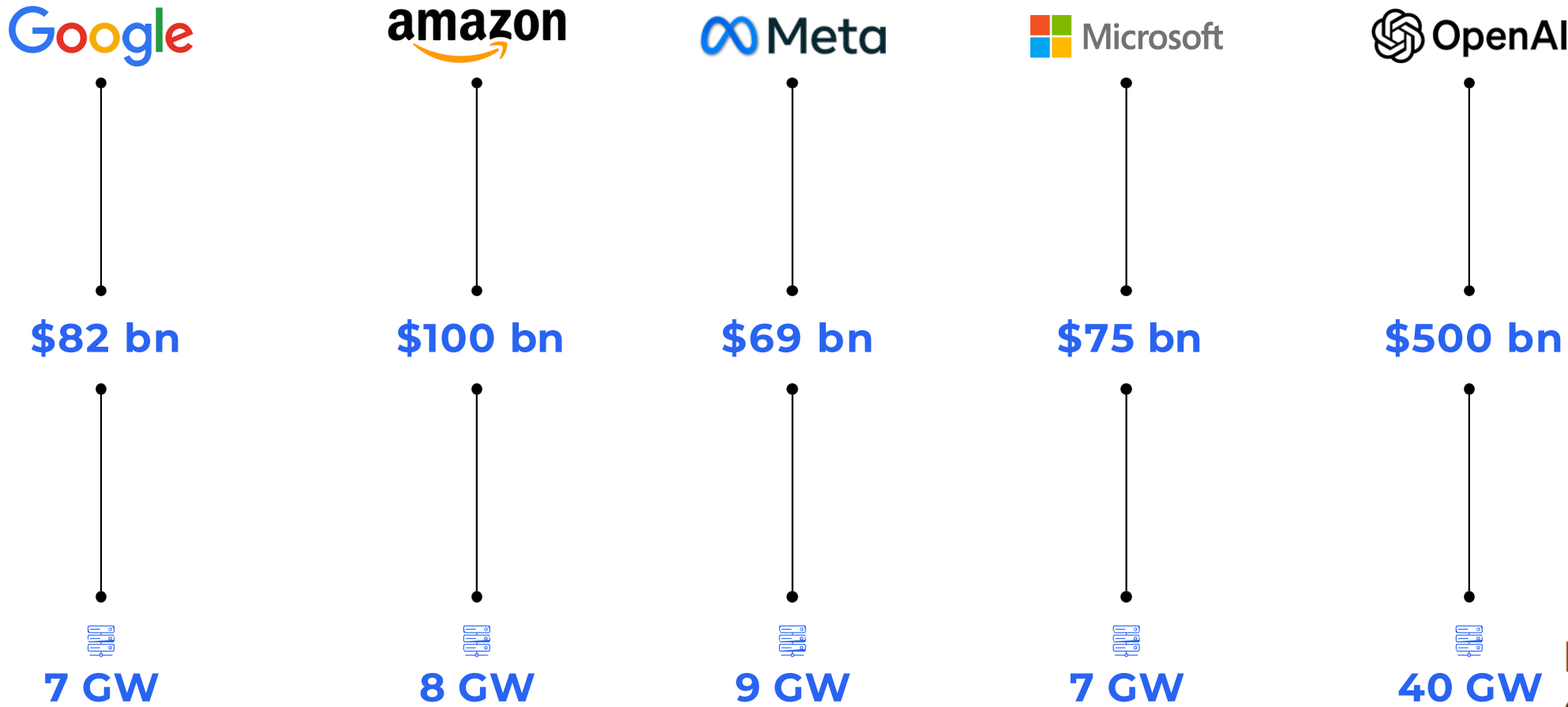
Source: BNEF – New Energy Outlook 2025. 1) Energy Outlook 2050, 2024 Edition. 2) AI power: Expanding data center capacity to meet growing demand, McKinsey 2024. 3) Global EV Outlook 2025, International Energy Agency (IEA). 4) IEA (2023), GlobalData. 5) Between 10 and 20% of electricity consumption from the ICT sector in 2030. 6) Tracking SDG7: The Energy Progress Report 2024. 7) Global Power Plant Tracker, 2025. 8) World Bank Group Data.

Average Power Demand of Digital Searches



Trillions of Dollars Pledged to AI: Global Race to Secure Power is On

Selected AI Data Center Investment
Announcements In Excess of 70 GW



Energy demands from AI datacentres to quadruple by 2030, says report

The IEA forecast indicates a sharp rise in the requirements of AI, but said threat to the climate was 'overstated' The Guardian

Can the US power grid keep up with the AI data centre boom?

Also in today's newsletter, an interview with former BP chief executive Bernard Looney on the global AI power crunch FINANCIAL TIMES

Data center power crunch: Meeting the power demands of the AI era

Memories of deadly winter blackouts haunt the Texas data center boom

A newly passed law in Texas requires emergency, remote-controlled shutoff switches for data centers, including the massive \$500 billion AI supercomputer backed by President Trump. The Washington Post

Is the UK energy grid ready for AI's power demands?

Opinion By Guy Bartram published August 15, 2025 tech radar

AI workloads, particularly LLMs and analytics, impose varying energy demands

Growing Element of Grid Support from “Powerships” (previously a solution for undeveloped grids – now a “speed to power” and “instant grid stabilization” option)



Azua, Dominican Republic

- › **419MW** Total Installed Capacity
- › 3 assets combine for integrated solution
- › Connection via overhead transmission lines



**OVERHEAD TRANSMISSION
LINE**

**HIGH VOLTAGE SUBSTATION
ONBOARD**

**3 POWERSHIPS
WITH A TOTAL INSTALLED
CAPACITY OF 419 MW**

Medan, Indonesia

- **470MW** Total Installed Capacity
- Connection via Overhead Transmission Lines
- Providing Base-Load Power through Pipeline Gas



POWERSHIP

**WITH A TOTAL INSTALLED
CAPACITY OF 470 MW**

**OVERHEAD
TRANSMISSION LINE**

**PIPELINE
GAS CONNECTION**

Amurang, Indonesia

- › **125MW** Total Installed Capacity
- › Use of GE Flexible Gas Hose Connection



POWERSHIP

WITH A TOTAL INSTALLED
CAPACITY OF 470 MW

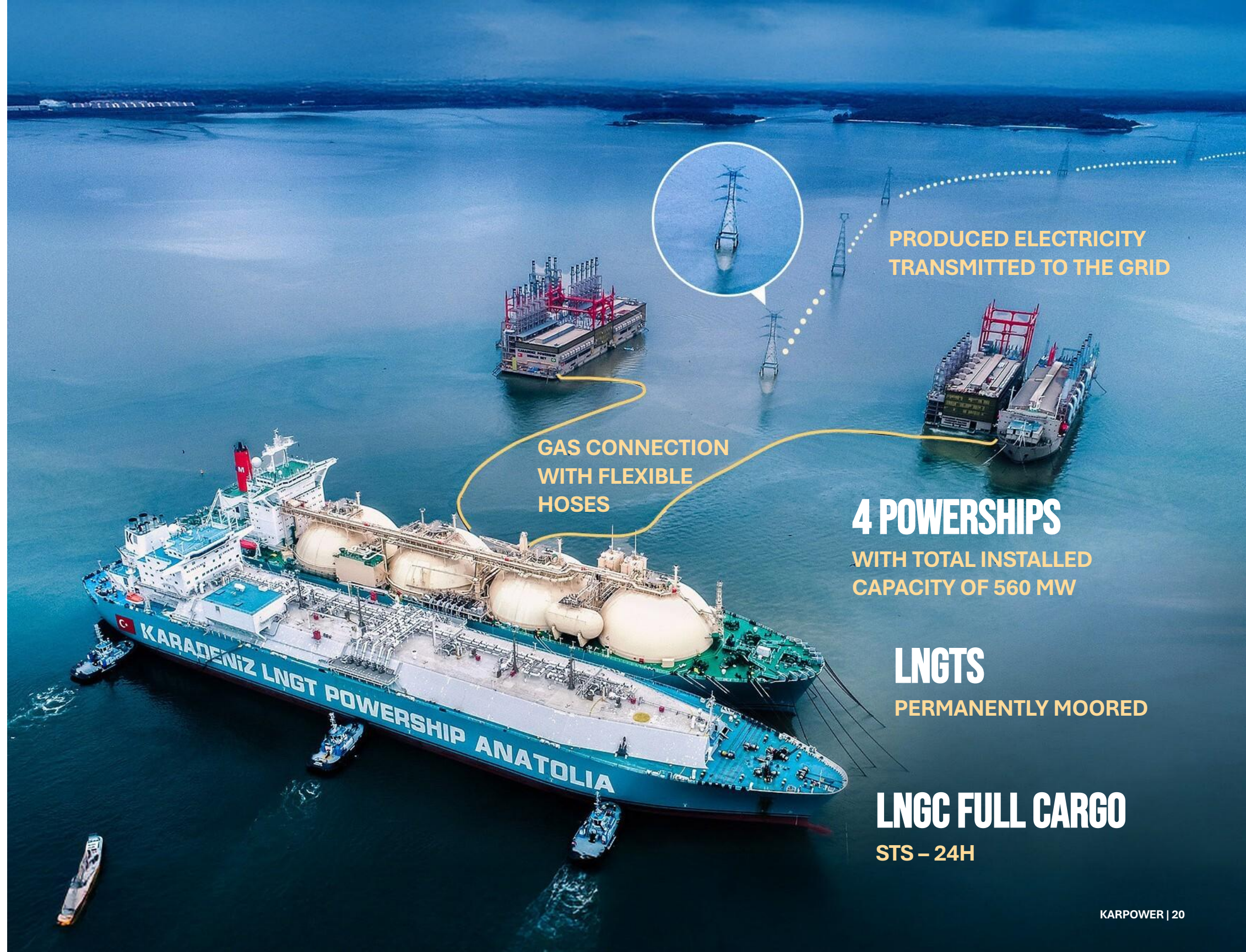
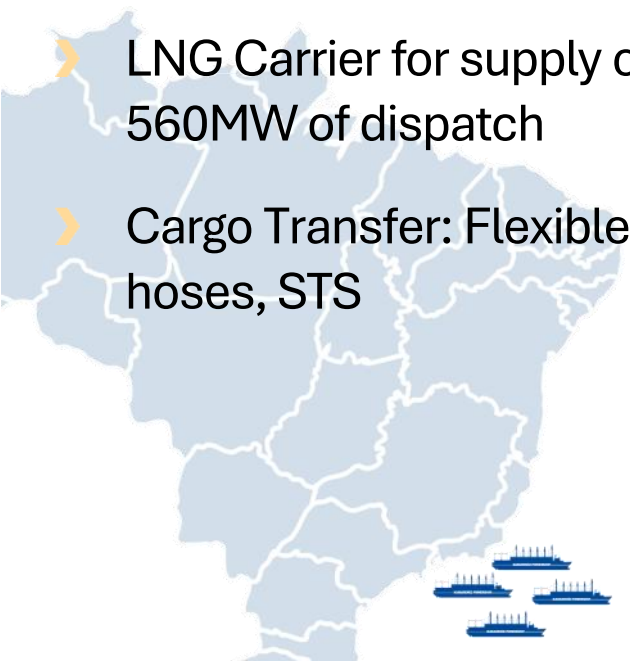
LNGTS

SPREAD MOORED
IN AMURANG BAY

GAS CONNECTION WITH
FLEXIBLE HOSES

Rio de Janeiro, Brazil

- › **560MW** Total Installed Capacity
- › LNG Storage Capacity: **125,000 m³**
- › Moss type containment system
- › LNG Carrier for supply of 560MW of dispatch
- › Cargo Transfer: Flexible hoses, STS



PRODUCED ELECTRICITY
TRANSMITTED TO THE GRID

GAS CONNECTION
WITH FLEXIBLE
HOSES

4 POWERSHIPS
WITH TOTAL INSTALLED
CAPACITY OF 560 MW

LNGTS
PERMANENTLY MOORED

LNGC FULL CARGO
STS – 24H

Tema, Ghana

- **470MW** Total Installed Capacity
- Receiving natural gas directly from the local gas grid



POWERSHIP

WITH TOTAL INSTALLED
CAPACITY OF 470 MW

Karpower Valley

Turkish power plant builder plans at least \$4.5B investment at Port of Brownsville

The company is the latest in a string to plan billions in buildouts at the port.


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Image: Port of Brownsville

The Turkish company plans to invest at least \$4.5 billion at the port, creating around 700 jobs.

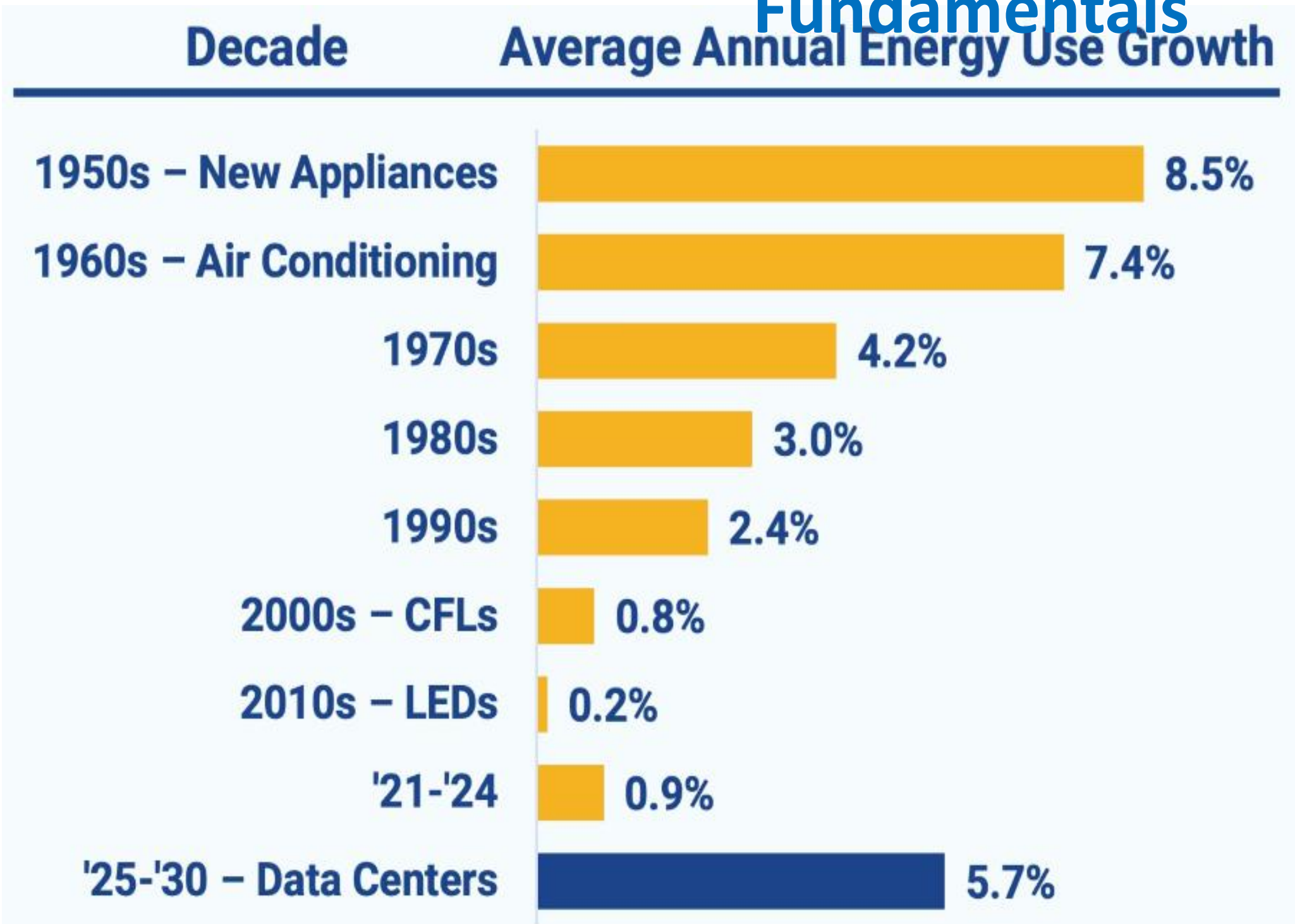
PORT OF BROWNSVILLE





3. U.S. DOMESTIC OUTLOOK

Not a Bubble: This is a Shift in Power Demand Fundamentals



Drivers of Load Growth Through the Decades

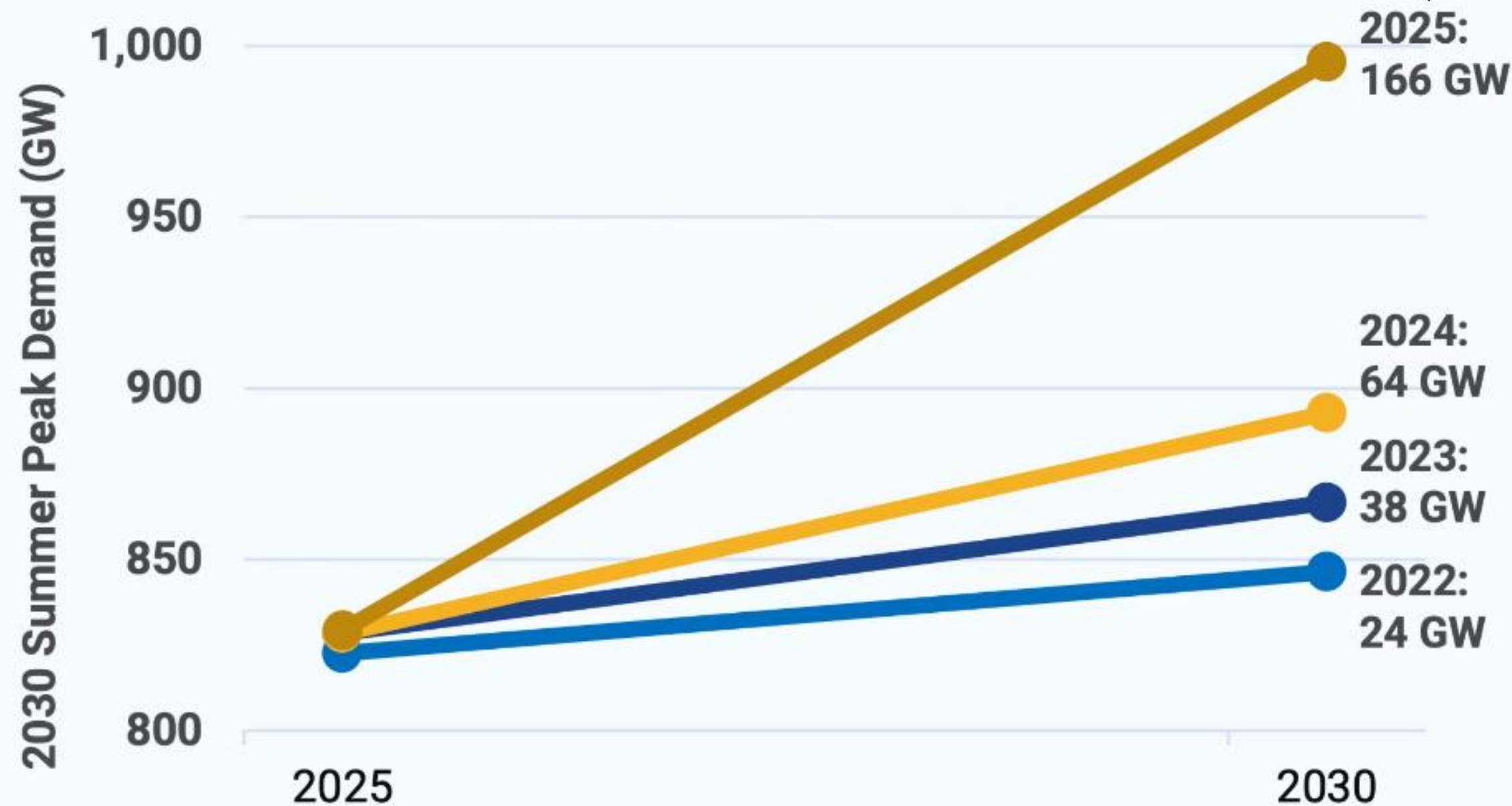
Is the trend of AI and datacenter-driven growth growth just getting started?

Source: [GridStrategies, Power Demand Forecasts Revised Up for Third Year Running, Led by Data Centers \(Nov. 2025\)](#)

Load Growth Forecasts Keep Growing

5-year Nationwide Summer Peak Growth

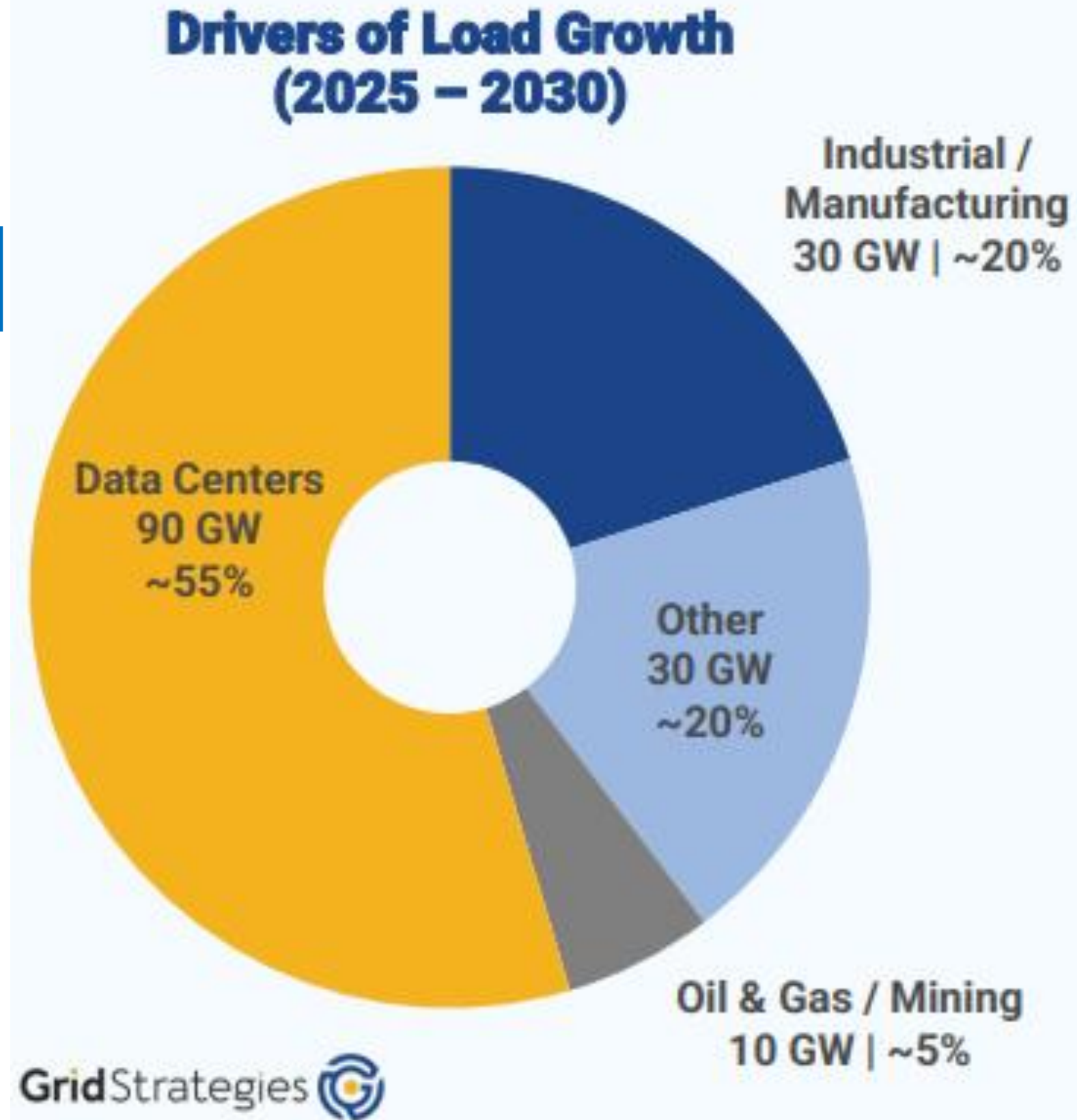
Aggregate of Forecasts Submitted to FERC in 2022-2025



166 GW is the equivalent of adding 15 New York Cities to the grid in 5 years

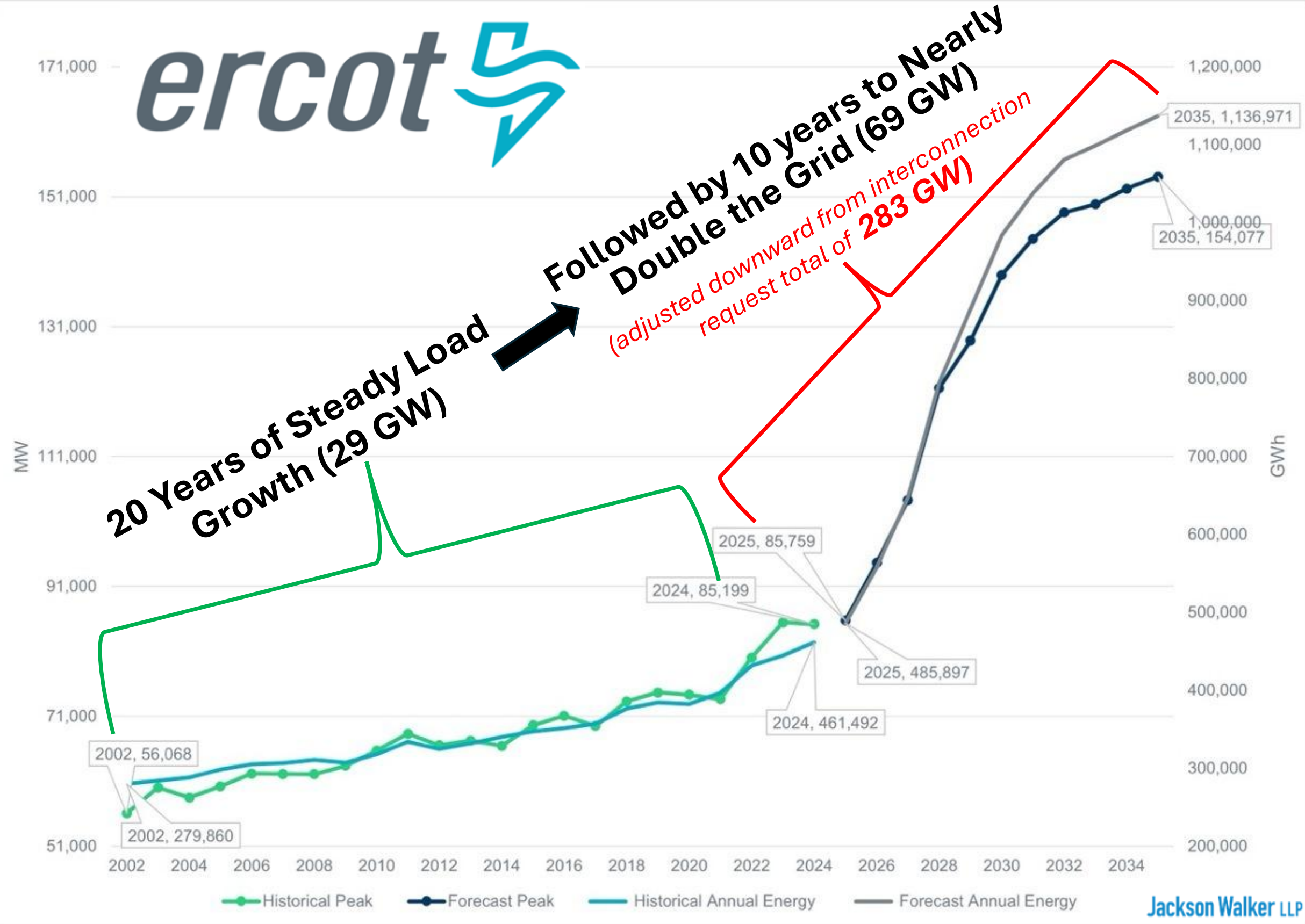
Source: [GridStrategies, Power Demand Forecasts Revised Up for Third Year Running, Led by Data Centers \(Nov. 2025\)](#)

But this
Unprecedented
Growth is not
All About
AI and
Datacenters



CASE
STUDY:
TEXAS
Load
Growth
Projections

Compare:
Arizona's Total
Current Peak
Power Use is
Around 20 GW



The Pushback on Datacenters is Real



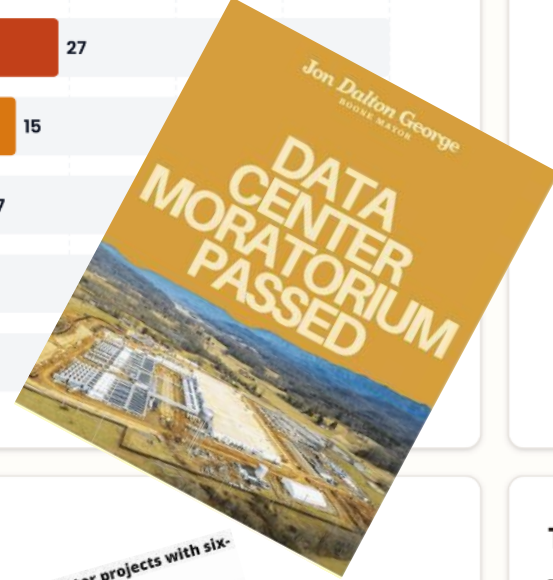
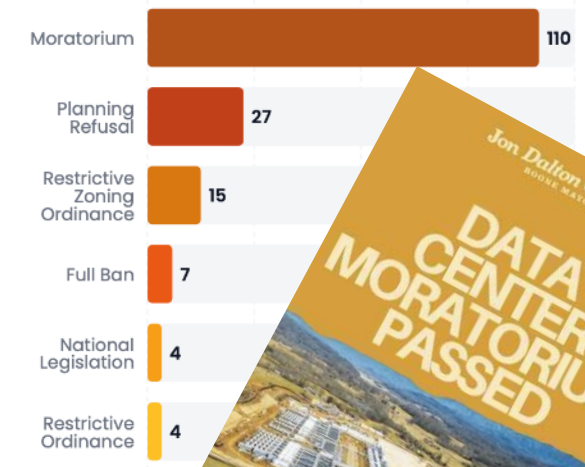
Governor Abbott Directs PUC And ERCOT To Shield Texans From Data Center Infrastructure Costs

June 10, 2026 | Austin, Texas | [Press Release](#)

Governor Greg Abbott today directed the Public Utility Commission of Texas (PUC) and the Electric Reliability Council of Texas (ERCOT) to take immediate steps to protect residential ratepayers from the costs of data center expansion.

By Type

Top 6 rejection categories



By Country

Top 6 countries by count



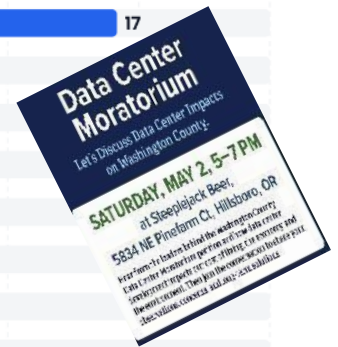
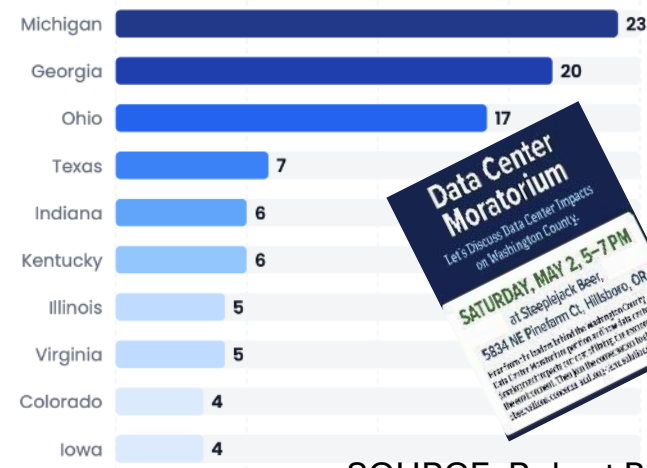
Cadence

Rejections per month



Top US States

Top 10 states by count

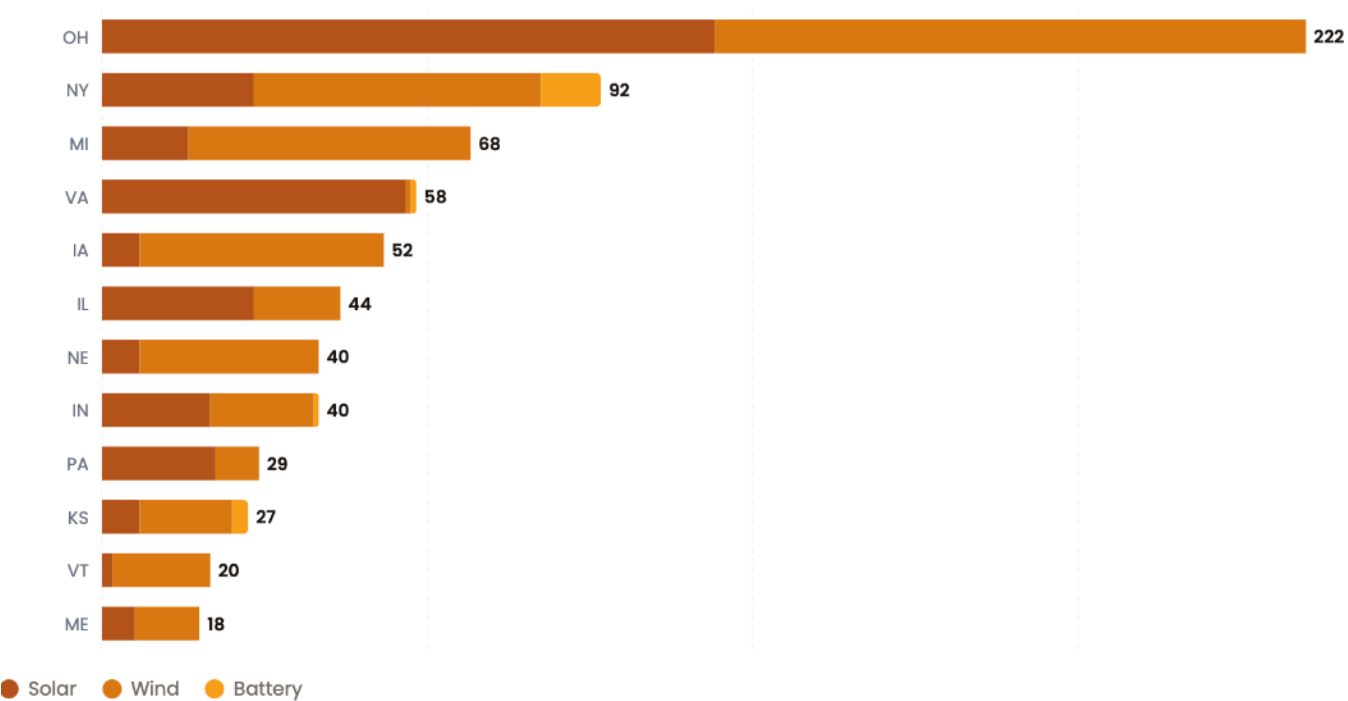


SOURCE: Robert Bryce

Power Generation Projects are Collateral Damage (Renewable & Battery Projects Too)

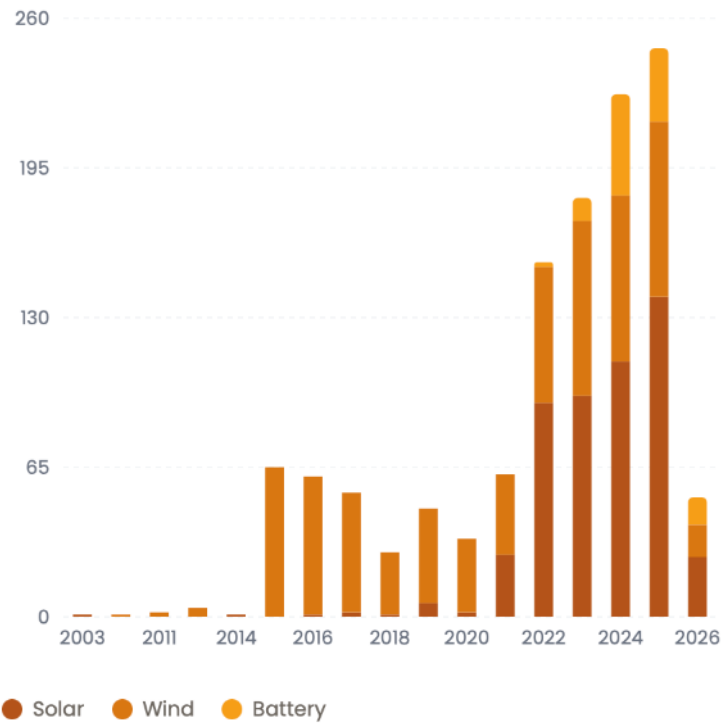
State x Type Breakdown

Top 12 states, stacked by energy type



Yearly Rejections

Per year, by energy type



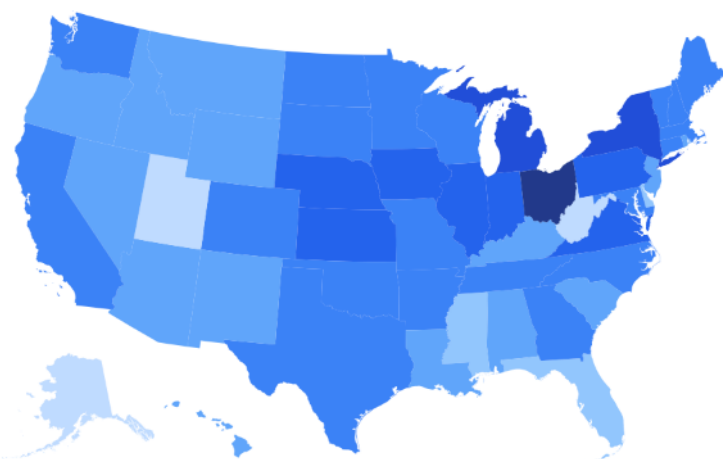
Cumulative Rejections

Running total over time, by type



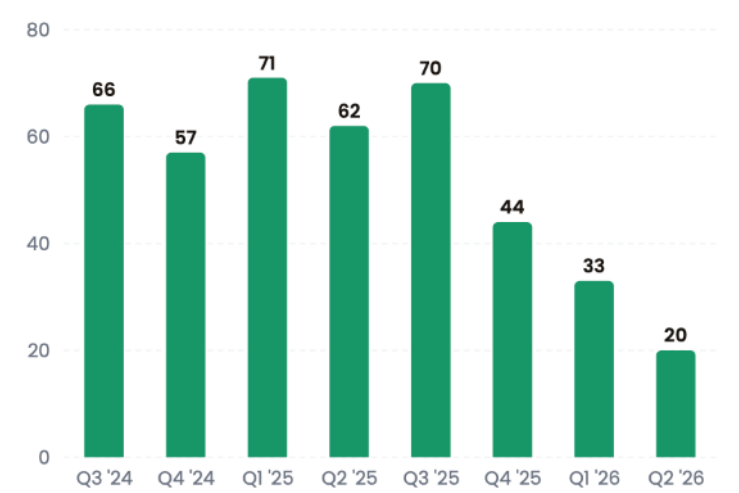
Rejections by State

Darker shading = more rejections



Quarterly Rejections

Last 8 quarters



SOURCE: Robert Bryce



4. Energy Policy Response

Executive Orders: Energy Policy

Multiple comprehensive executive orders have been issued (and they are still coming) to reshape federal energy policy. These actions declare a national energy emergency, establish new governance structures, protect domestic energy production from state interference, revitalize the coal industry, strengthen grid reliability, and reform regulatory frameworks.



National Energy Dominance Council

Establishing the National Energy Dominance Council (EO 14213, February 14) — Creates cabinet-level coordination body for energy policy.



Emergency Declaration

Declaring a National Energy Emergency (EO 14156, January 20) — Invokes emergency powers to accelerate energy infrastructure development.



Unleashing American Energy

Unleashing American Energy (EO 14154, January 20) — Promotes domestic energy production by reducing regulatory burdens and accelerating infrastructure projects.

Reinvigorating America's Beautiful Clean Coal Industry (EO 14261, April 8, 2025)

Protecting American Energy From State Overreach (EO 14260, April 8 2025)

Strengthening the Reliability and Security of the United States Electric Grid (EO 14262, April 8, 2025)

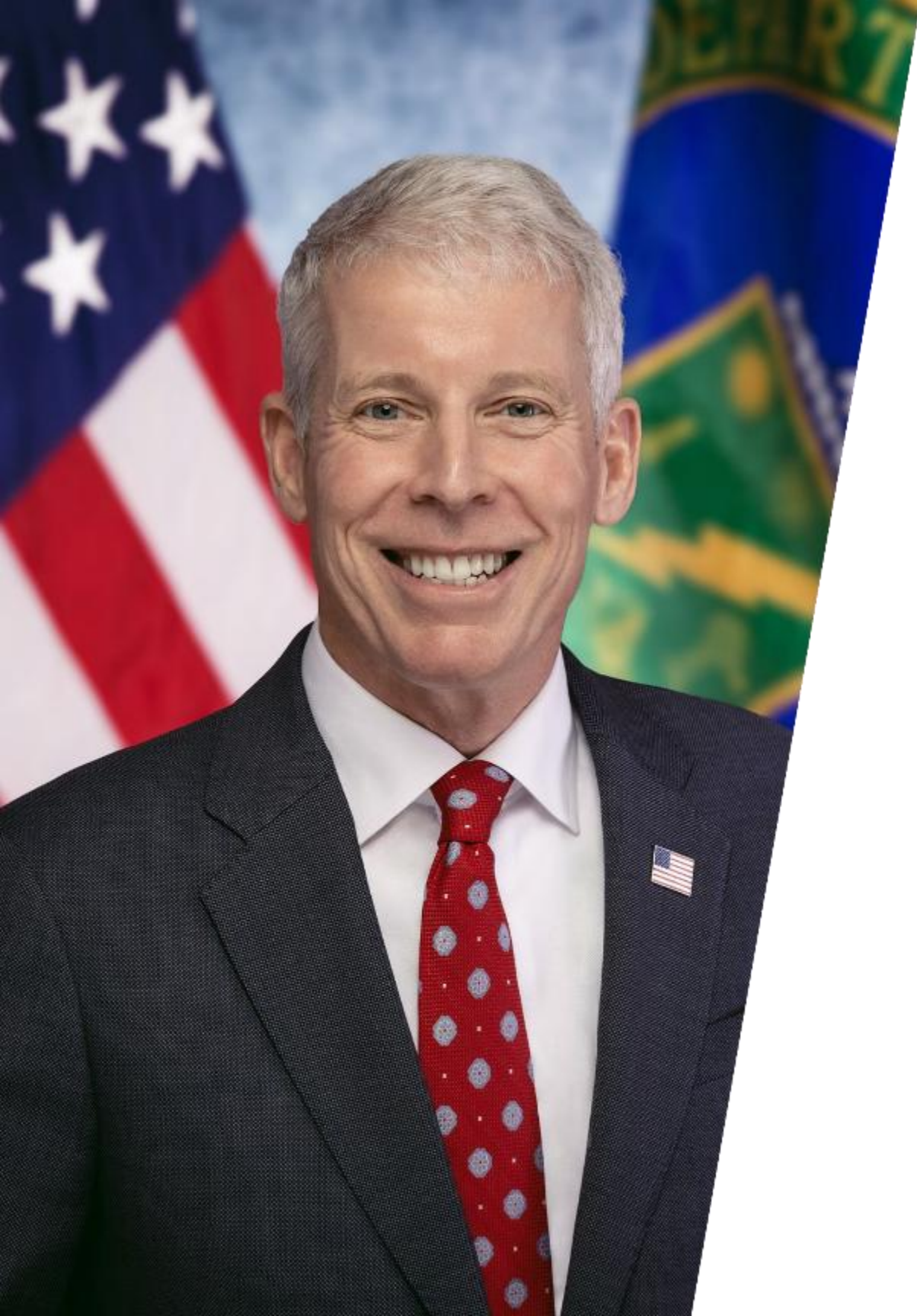
Zero-Based Regulatory Budgeting To Unleash American Energy (EO 14270, April 9 2025)

Ending Market Distorting Subsidies for Unreliable, Foreign-Controlled Energy Sources (EO 14315, July 7 2025)

Unleashing Alaska's Extraordinary Resource Potential (EO 14153, January 20, 2025)

STRENGTHENING UNITED STATES NATIONAL DEFENSE WITH AMERICA'S BEAUTIFUL CLEAN COAL POWER GENERATION FLEET (February 11, 2026)

Five Concurrent Defense Production Act Directives relating to Development, Manufacturing, and Deployment of Large-Scale Energy and Energy Related Infrastructure (April 20, 2026)



DOE: Strengthening Grid Reliability and Security

1

Emergency Authority Streamlined

Section 202(c) of Federal Power Act activated for grid emergencies

2

Critical Resource Protection

DOE prevents closure of generation >50 MW in at-risk regions

3

Uniform Methodology for Reliability

90-day deadline for reserve margin analysis framework

DOE issued its [Reliability Report](#) in July 2025

National Grid Emergency

Made worse by retirements of dispatchable resources

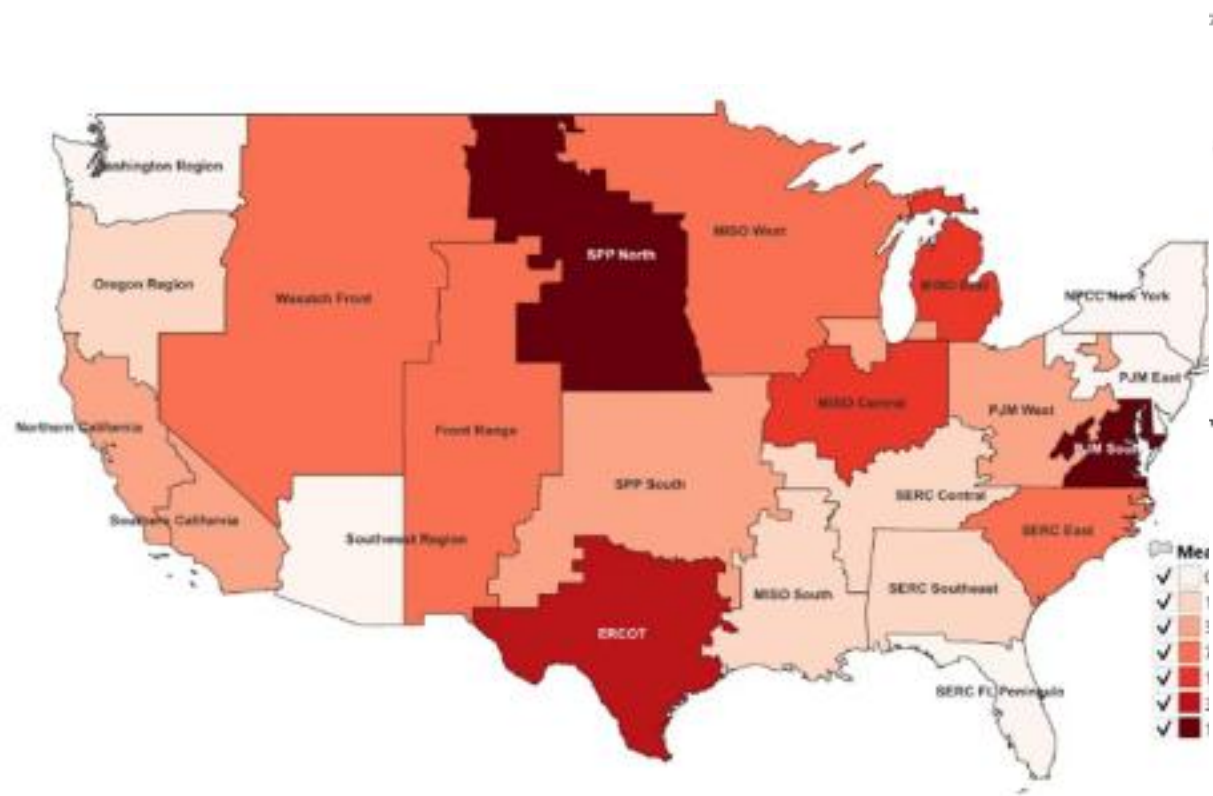


Figure 1. Mean Annual LOLH by Region (2030) – Plant Closures

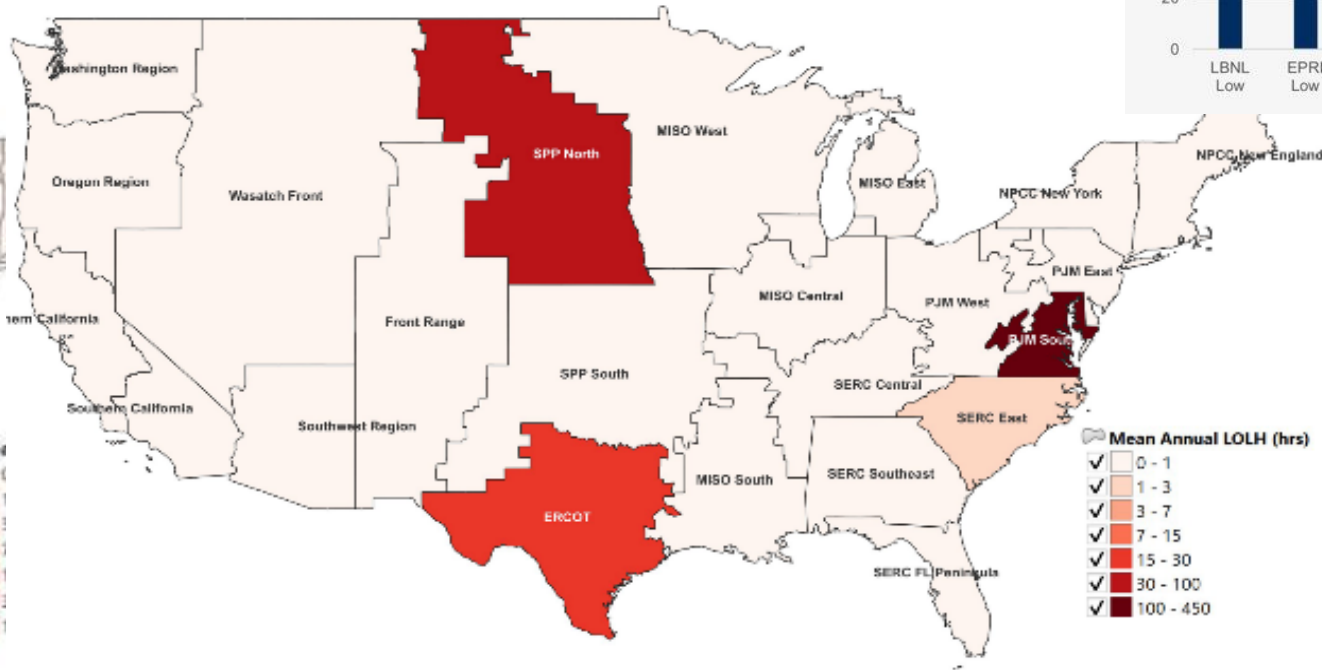
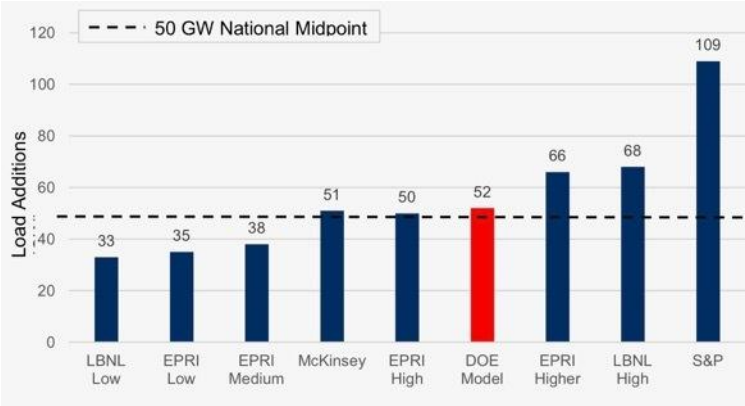


Figure 2. Mean Annual LOLH by Region (2030) – No Plant Closures



DOE Metrics:
2.4
Target LOLH

Loss of Load Hours
annual standard

0.002%
Target NUSE

Normalized Unserved
Energy threshold

With planned retirements:

National LOLH: 7-430 hours per year

Most areas exceed DOE reliability standards

PJM: 1,052 LOLH in worst year

Even if retirements stopped:

PJM Average: 215 LOLH; worst year: 644 LOLH, 36% load lost

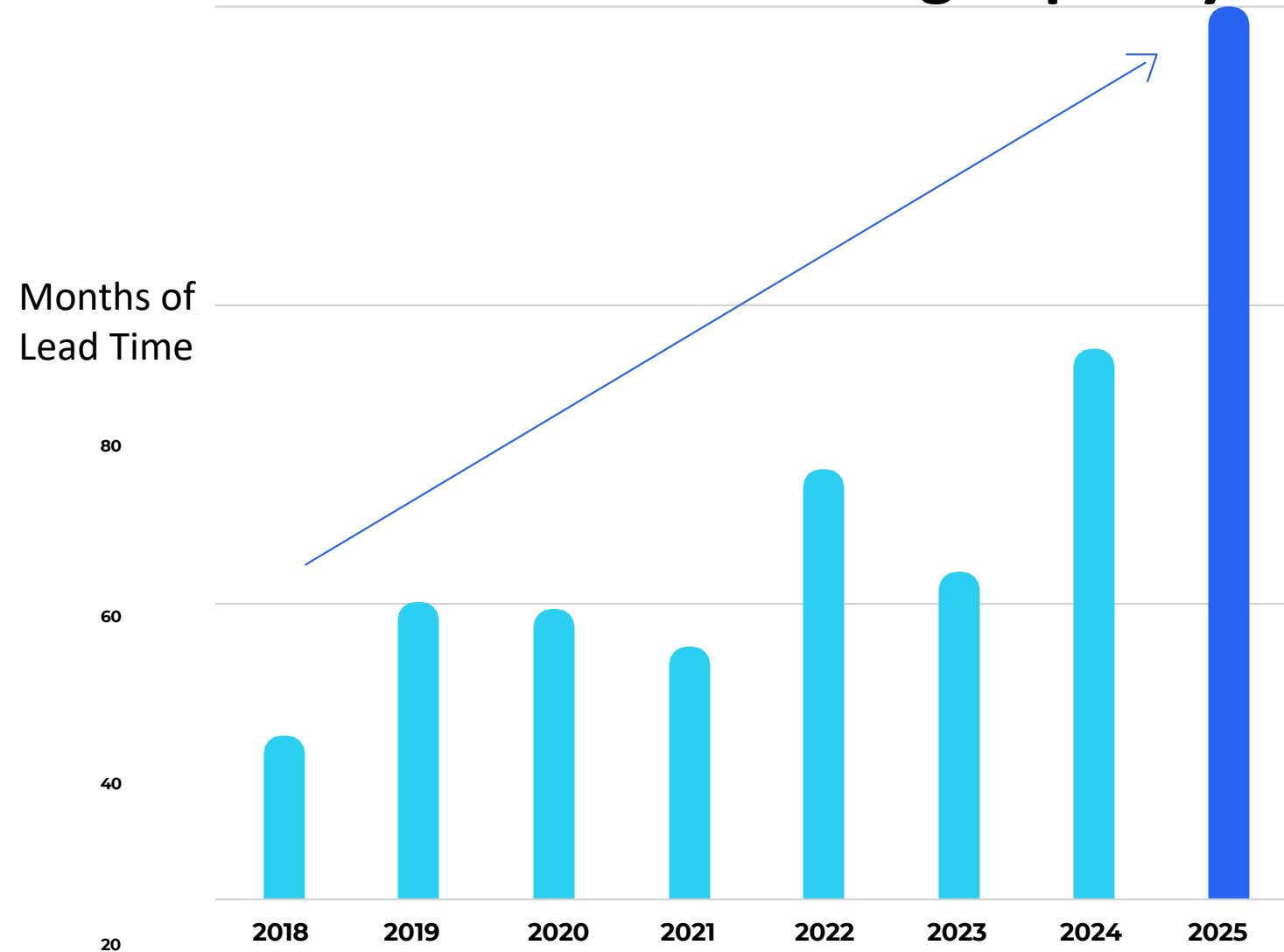
SPP: 48 LOLH average; worst year 19% load lost

ERCOT: 20 LOLH average; worst year: 101 LOLH, 27% load lost

EMERGING SUPPLY CHAIN ISSUES

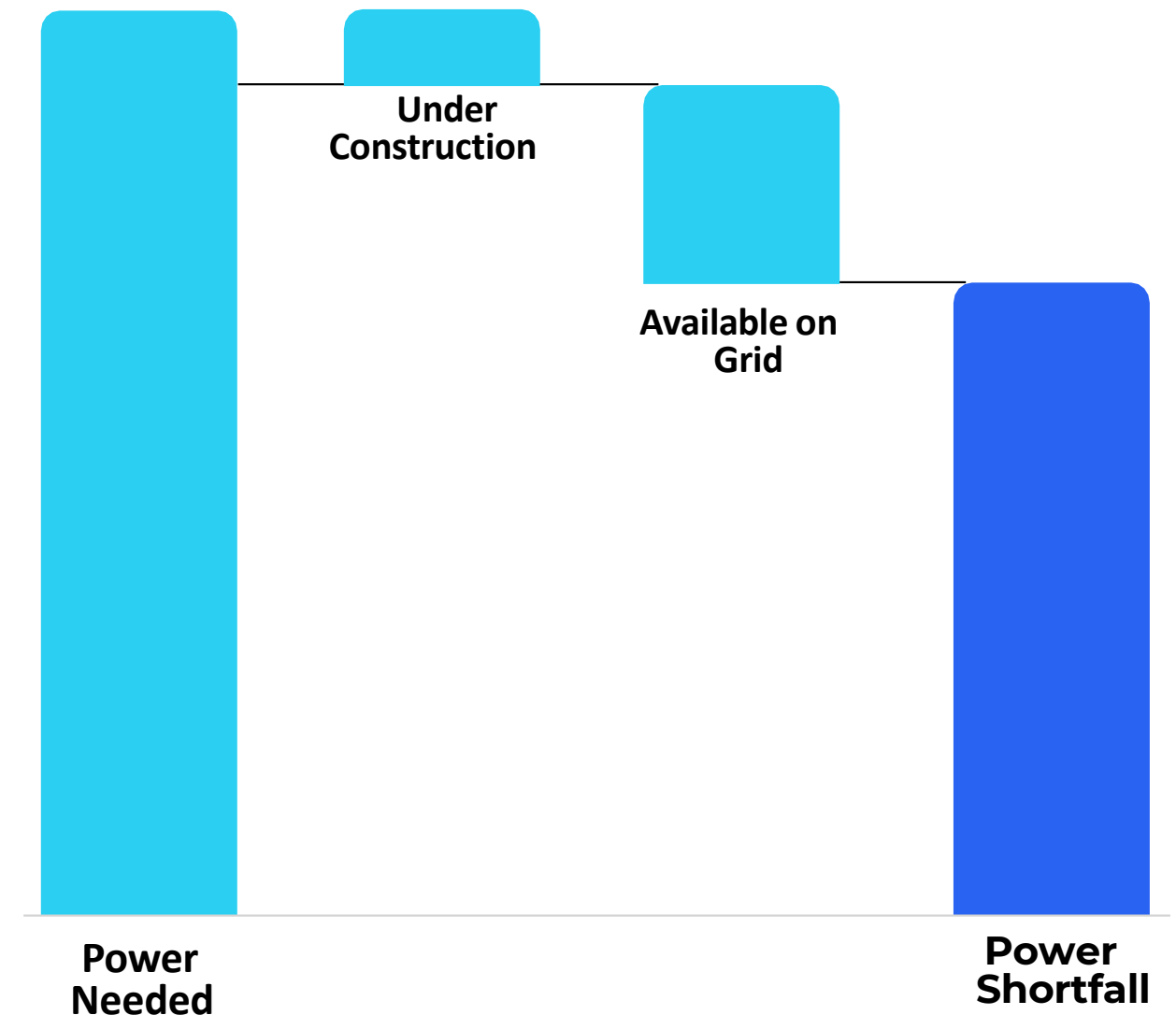
(long turbine lead times & other component backlogs)

Gas turbine orders exceeding capacity



Source: Morgan Stanley Research

Potential power shortfall for US Data Centers | 2025-28



100-300 GW of Firm Capacity, Already on the Grid

The fastest reliability fix isn't new build — it's making underutilized coal & gas more competitive in dispatch.

~100-300 GW

of firm, dispatchable, fuel-secured capacity
sitting idle on average

172 GW U.S. coal nameplate × (1 – 42% avg. capacity factor)

“The grid's biggest reliability asset is already built and connected.”

Reliability is already stressed

- NERC 2025 LTRA: 13 of 23 assessment areas at elevated or high resource adequacy risk
- 246 GW of winter peak demand growth projected over the next 10 years — highest CAGR since NERC began tracking in 1995

The Heat Rate Improvement (HRI) Project math

5% heat rate improvement

→ ~\$1.00–\$1.50/MWh lower offer · 500–1,000 more dispatch hrs/yr · 5–12 pp capacity factor gain

Capital cost ratio

30:1 to 100:1 cheaper than new NGCC · 100:1+ vs. solar + storage

Implementation timeline

Months, not years (vs. 5–7+ yrs for new gas + 4.5+ yrs avg. interconnection queue)

Faster · cheaper · already built · already connected — HRI is the lowest-risk path to firm capacity at scale.

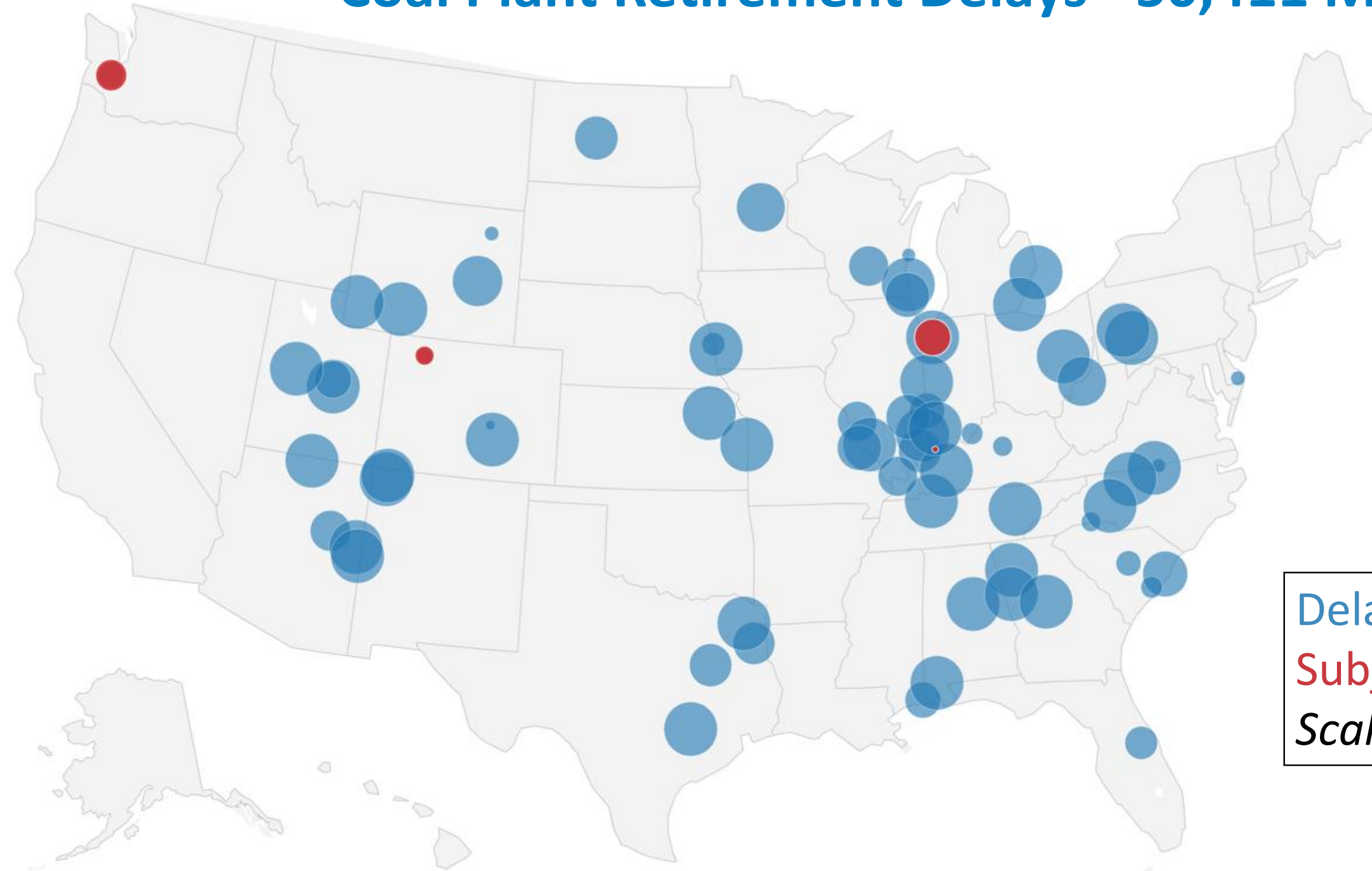
Sources: NERC, 2025 Long-Term Reliability Assessment (Jan. 2026); EIA Electric Power Monthly tbls. 6.07.A & 6.07.B; EPA Affordable Clean Energy Rule, 84 Fed. Reg. 32,520 (July 8, 2019); EPRI Report 3002003457; Lawrence Berkeley Nat'l Lab interconnection queue data.

Coal Retirement Delay Tracking Chart – 50,411 MWs of retiring capacity spared (so far)

** The information contained in this spreadsheet reflects the most current information publicity available based on inquiry, research, and reporting. Where readily available, links to the public reporting of information relating to each situation are included for reference in the column labeled “news reporting.” Because each of these situations is fluid with plans constantly subject to change, the dates, capacities, and other information in this spreadsheet are subject to change the simply reflect the very latest information known to the author after making a good faith inquiry into each.

Plant	Source	State	Planned	Revised	Capacity	Plant	Source	State	Planned	Revised	Capacity
Indian River (NRG Energy)	GEM Wiki	DE	2022	2025	630 MW	Roxboro 1 & 4	GEM Wiki	NC	2028	2029	1,155 MW
Bowen 1 & 2 (Georgia Power)	GEM Wiki	GA	2028	2038	3,498 MW	North Omaha (OPPD)	GEM Wiki	NE	2026	2028	644 MW
Scherer (Georgia Power)	GEM Wiki	GA	2028	2038	2,673 MW	Coal Creek (Rainbow Energy)	GEM Wiki	ND	2022	No date set	1,210 MW
Cayuga 1 & 2 (Duke Energy)	GEM Wiki	IN	2028	2030/2031	1,175 MW	San Juan (PNM)	GEM Wiki	NM	2022	2022	924 MW
Scheahfer Power Station (NIPSCO)	GEM Wiki	IN	2023	2025	1,105 MW	Newmont (TS Power)	GEM Wiki	NV	2026	No set date	242 MW
F.B. Culley (Centerpoint)	GEM Wiki	IN	2024	2027+	369 MW	Wateree Station	GEM Wiki	SC	2028	2031-2032	771 MW
Gibson 1 & 2 (Duke Energy)	GEM Wiki	IN	2034	2035	1,336 MW	Wimyah 1 & 2 (Santee Cooper)	GEM Wiki	SC	2023-2027	2035	1,260 MW
Gibson 3, 4, 5 (Duke Energy)	GEM Wiki	IN	2029/2030	2030/2031	2,004 MW	Cumberland 1 & 2 (TN) (TVA)	GEM Wiki	TN	2026	2028/2029	2,600 MW
Merom 1 & 2 (Hallador Pwr)	GEM Wiki	IN	2023	No set date	1,080 MW	Fayette (City of Austin)	GEM Wiki	TX	2023	2029	1,690 MW
Baldwin Plant (VISTRA)	GEM Wiki	IL	2025	2027	1,259 MW	Bonanza (Deseret G&T)	GEM Wiki	UT	2030	2041-2042	499 MW
Jeffrey 2 & 3 (Evergy)	GEM Wiki	KS	2030/2039	No set date	2,160 MW	Hunter (Rocky Mtn. Power)	GEM Wiki	UT	2032	No set date	1,577 MW
Lawrence Unit 4 & 5 (Evergy)	GEM Wiki	KS	2023	2028	517 MW	Huntington (Rocky Mtn. Power)	GEM Wiki	UT	2036	No set date	1,037 MW
Ghent 2 (Louisville G&E/KY Util.)	GEM Wiki	KY	2024-2027	No set date	556 MW	Intermountain Power Plant	GEM Wiki	UT	2025	No set date	1,640 MW
Brown 3 (Louisville G&E/KY Util.)	GEM Wiki	KY	2028	2035	464 MW	Clover (Dominion Energy)	GEM Wiki	VA	2025	No set date	848 MW
Brandon Shores (Talen)	GEM Wiki	MD	2025	2029	1,273 MW	Edgewater (Alliant Energy)	GEM Wiki	WI	2015	2025	413 MW
J H Campbell (Consumers Energy)	GEM Wiki	MI	2025	No date set	1,331 MW	Columbia (Alliant Energy)	GEM Wiki	WI	2023-2024	2026-2029	1,112 MW
Sherburne 1 (Xcel Energy)	GEM Wiki	MN	2025	2026	765 MW	S. Oak Creek 5 & 6 (WI Electric)	GEM Wiki	WI	2023-2024	2024	641 MW
Sherburne 2 (Xcel Energy)	GEM Wiki	MN	2022	2023	766 MW	S. Oak Creek 7 & 8 (WEC Energy Group)	GEM Wiki	WI	2023-2024	2026	641 MW
Sioux 1 & 2 (Ameren)	GEM Wiki	MO	2028	2031-2035	1,099 MW	Elm Road	GEM Wiki	WI	N/A	2028	1,402 MW
Daniels 2 (Mississippi Power)	GEM Wiki	MS	2028	2033-2036	500 MW	Pleasants (First Energy)	GEM Wiki	WV	2019	2024	1,368MW
Mayo (Duke)	GEM Wiki	NC	2028	2030	735 MW	Dave Johnston (Rocky Mtn. Power)	GEM Wiki	WY	2027	2028	816 MW
Roxboro Units 2 & 3	GEM Wiki	NC	2028	2034	1,402 MW	Jim Bridger 3 & 4 (Rocky Mt. Pwr Pacificorp)	GEM Wiki	WY	2028/2032	2037	2,326 MW

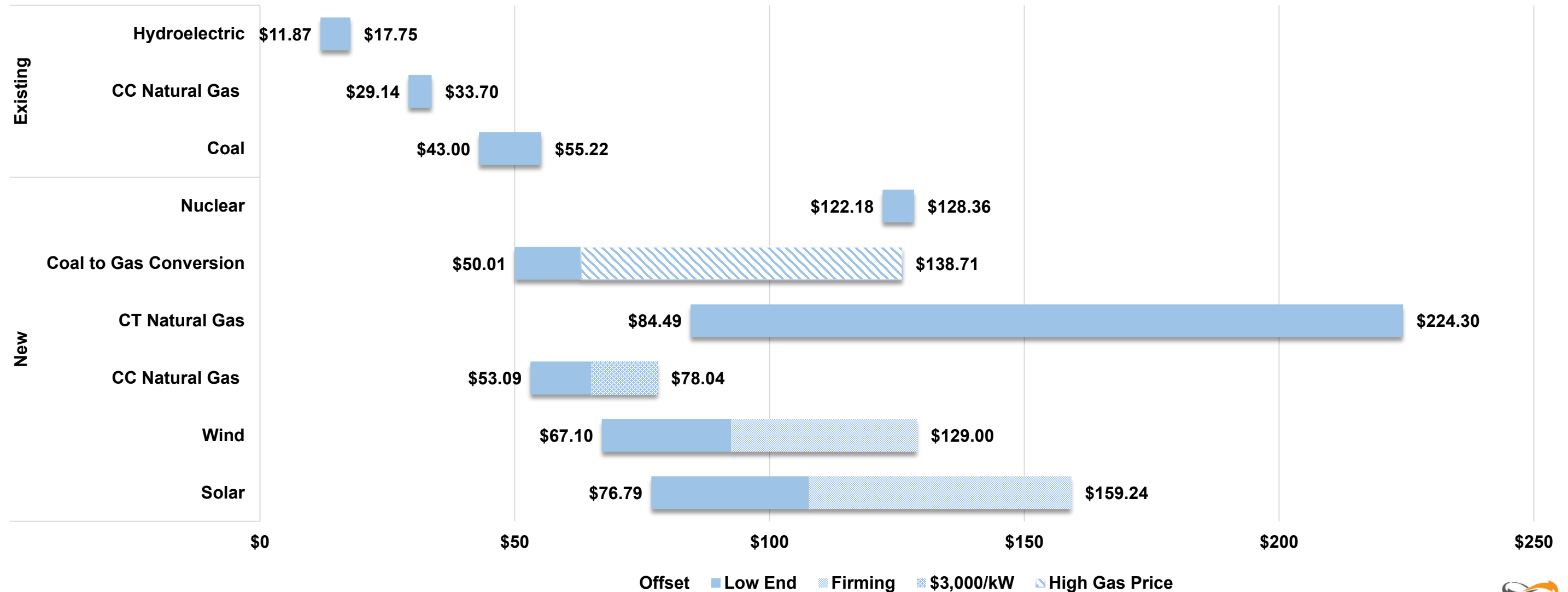
Coal Plant Retirement Delays - 50,411 MWs



Delayed Retirement
Subject to 202 Order
Scaled by MW

The Correct Way to Look at “Levelized Cost of Energy (LCOE)” When Deciding Whether to Retire/Convert Plants

The Levelized Cost of Indiana Energy Resources

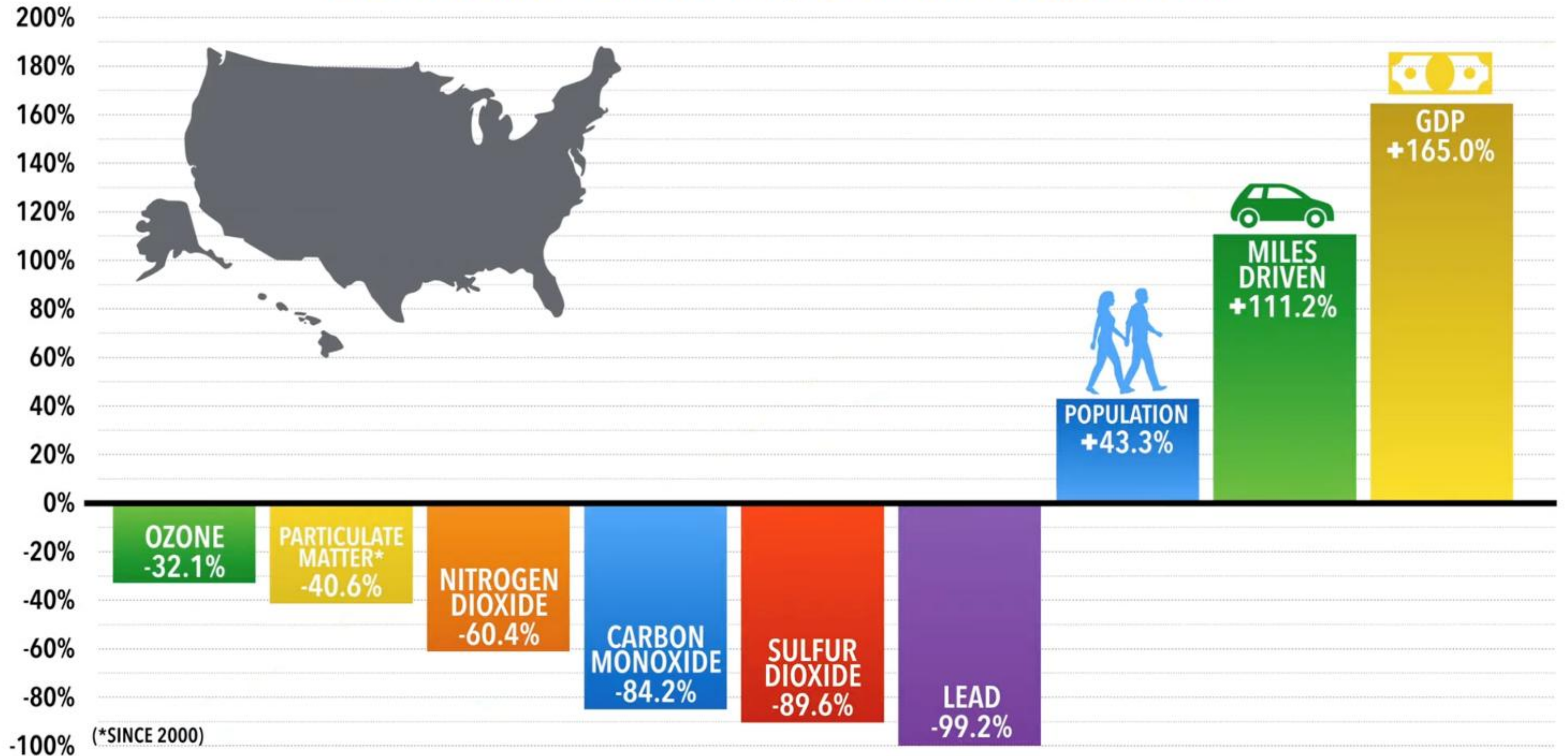


5. Environmental Policy Context

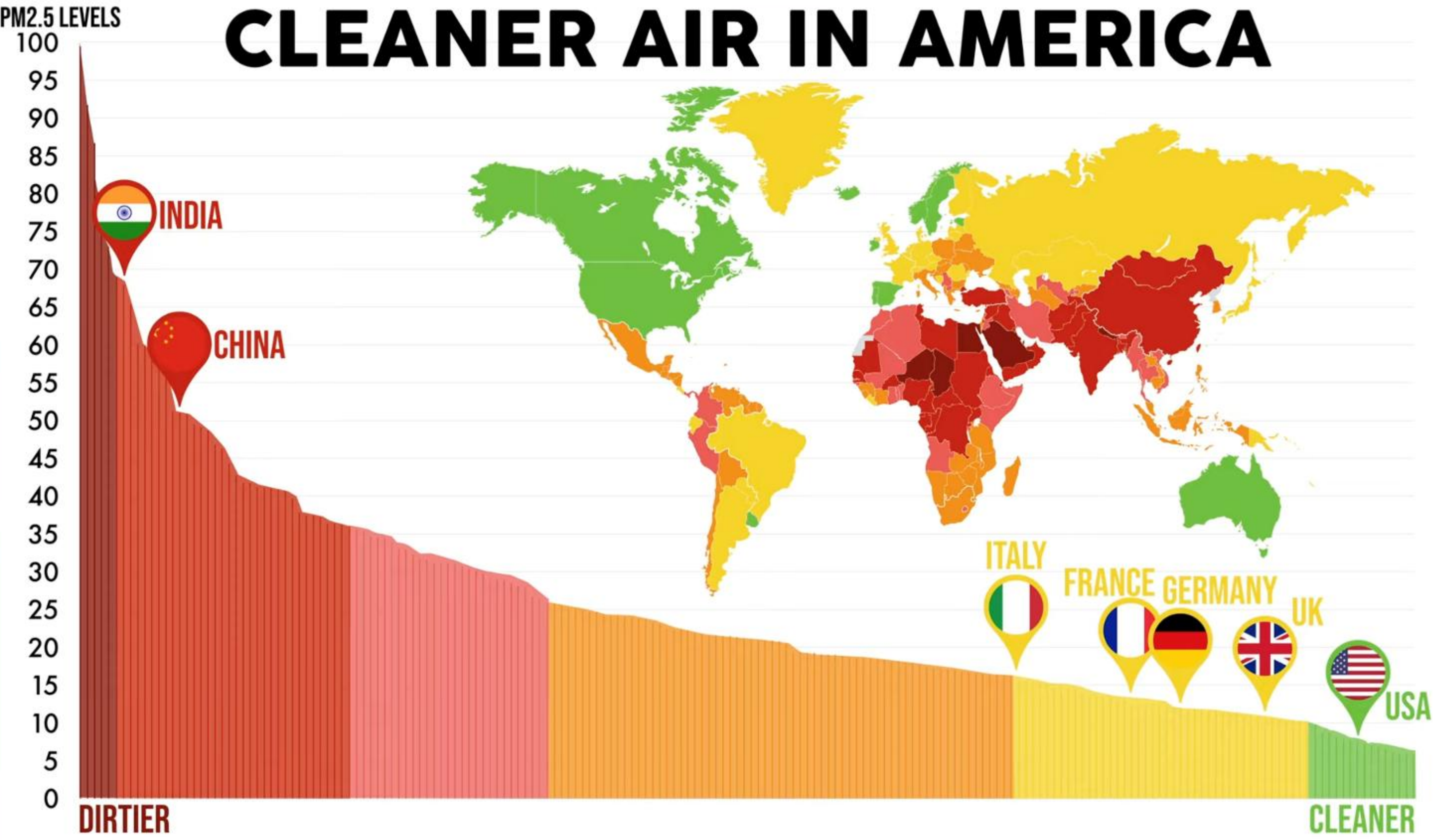


CLEANER AIR IN AMERICA

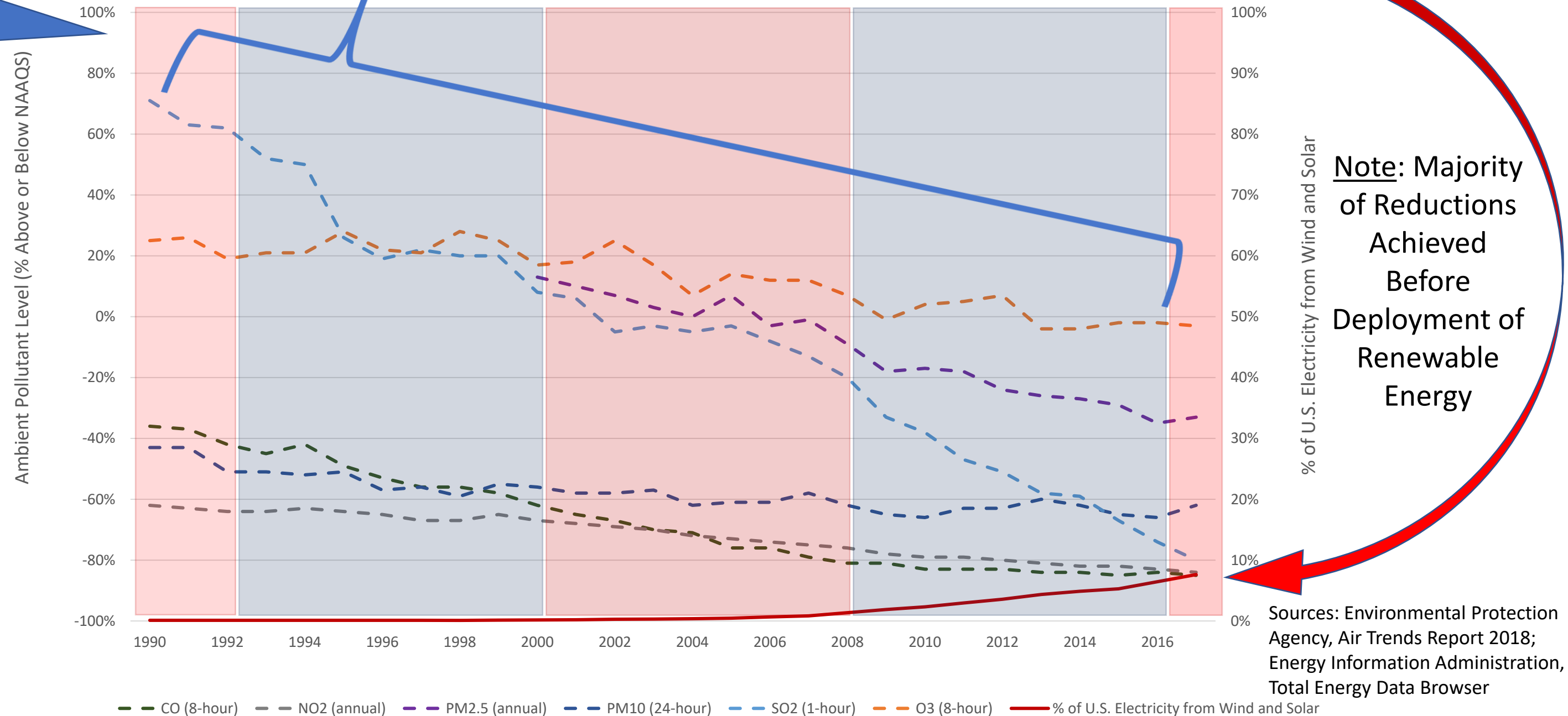
ECONOMIC GROWTH, LOWER POLLUTION



CLEANER AIR IN AMERICA



REMINDER: The U.S. Made its Air Safe with Technology, Not Anti-Fossil Fuel Ideology



THESE ARE THE POLLUTANTS WE KNOW CAN HURT PEOPLE

2025-2027+ Regulatory Reform Timeline

2025	2026	2026	2026	2026	2027+
PROPOSED June: MATS Repeal June: CPS Repeal July: 202 Repeal July: GHG Reporting July: TSCA Reform Sept: CCR Deadlines Oct: Regional Haze SIP Requirements Nov: ELG Repeal Nov: WOTUS Rule	PROPOSED Jan: CCR Reform Jan: NSR Reform - Public Participation Jan: NSR Reform - Begin Construction Jan: Common Sense Accidental Release Jan: Good Neighbor Plan Q1: 111(d) Reform 2026: Ozone SIP Requirements 2026: EPA NEPA 2026: Air Sampling Reform 2026: SIP Reform - Emission Reports 2026: PM NAAQS Revisitation	PROPOSED 2026: PFAS Determinations 2026: Citizens Suit Notice 2026: Ozone Transport Phase 2 2026: PFAS Reporting FINAL Jan: CT NSPS Q1: 202 Repeal Jan: Ozone Transport Phase 1 Q1: GHG Reporting Q1: CPS Repeal Q1: MATS Repeal	FINAL Q1: Title V “Applicable Requirements” Q1: Startup, Shutdown, Malfunction Q1: Exceptional Events Jan: PM NAAQS Revisitation Jan: SIP Reform - Emission Reports Jan: Ozone SIP Requirements Jan: Common Sense Accidental Release	FINAL Jan: WOTUS Rule Feb: PFAS Determinations Feb: Citizens Suit Notice Apr: TSCA Reform May: ELG Repeal June: Air Sampling Reform June: 111(d) Reform Aug: Ozone Transport Phase 2 Aug: NSR Reform - Public Participation Sept: NSR Reform - Begin Construction Oct: CCR Reform Dec: Regional Haze (3rd Planning Period Extension)	Jan: NPDES Reform TBD: PFAS in the Environment TBD: NESHAP for CTs TBD: Lead NAAQS TBD: NOx NAAQS

Current EPA GHG Reform Roadmap

Tailpipe Endangerment Finding Repeal

Feb 2026: Finalization of the repeal of the 2009 Endangerment Finding under the "cause or contribute" standard.

CPP 2.0 Repeal – Part 2 (Non-significant contribution finding Re-proposal)

Expected in Q3 2026: Re-proposal of the primary rationale for repealing Clean Power Plan 2.0 – failure to meet materiality standard in Section 111(b)(1)(A) of the CAA with (likely will be based on supplemental technical support expanding on “futility” data in Tailpipe Final Rule).

CPP 2.0 Repeal – Part 1 (CCS Mandate)

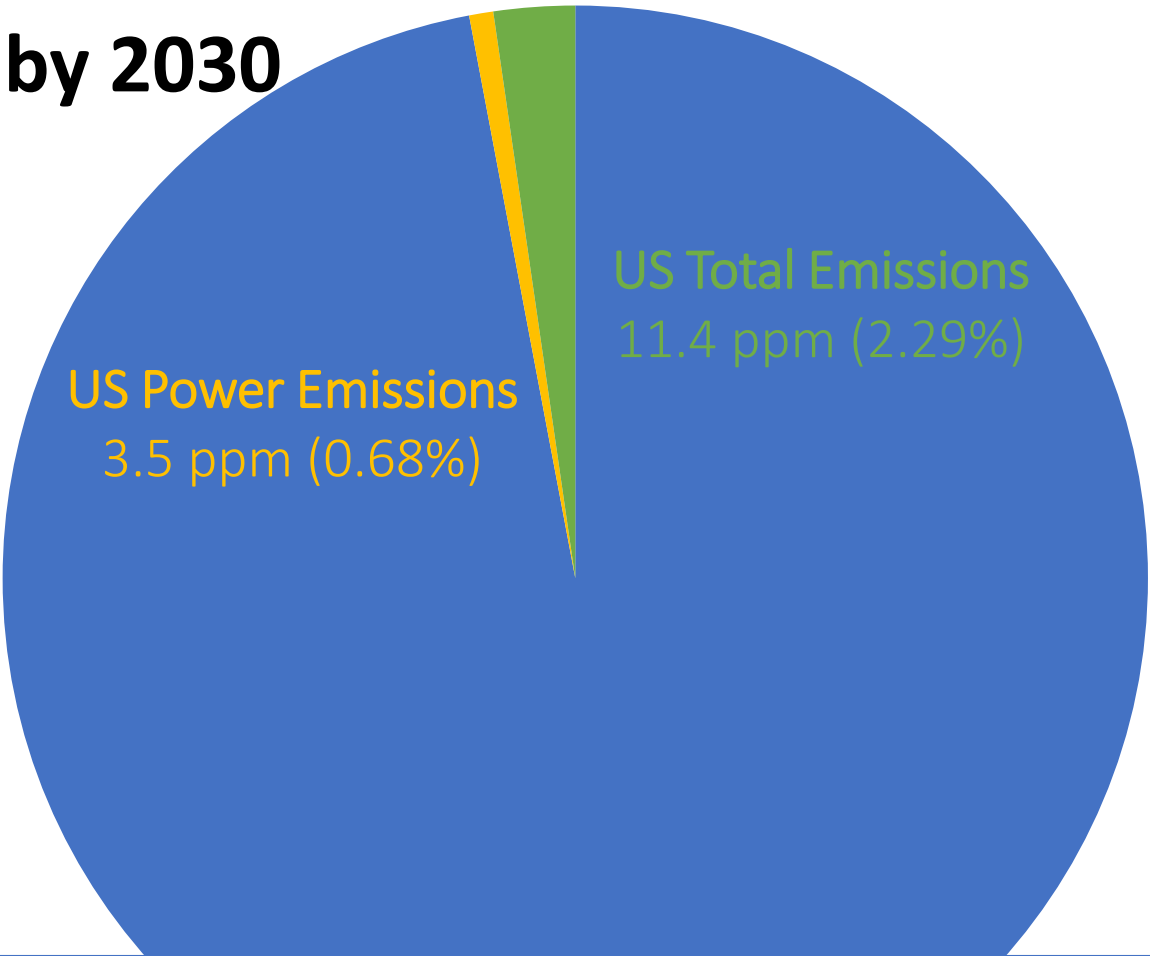
Sent to OMB on May 15, 2026: Finalization of alternative rationale for the repeal of Clean Power Plan 2.0, arguing that 90% Carbon Capture and Sequestration (CCS) is not an "adequately demonstrated" or "achievable" BSER.

CPP 2.0 Repeal (Non-significant contribution finding)

Estimated Q1-2 2027: Expected finalization of the finding that will prohibit any further carbon regulation of power plants under 111.

Concentration-based Impact of US GHG Emissions on “Endangerment”

- **2050 impact of decarbonizing entire US economy by 2030**
 - Reduction of 11.4 ppm (2.29%) in 2050
 - Reduction of global temps of 0.052 °C
- **2050 impact of decarbonizing US fleet by 2030**
 - Reduction of 3.5 ppm (0.68%) in 2050
 - Reduction of global temps of 0.013-0.015 °C

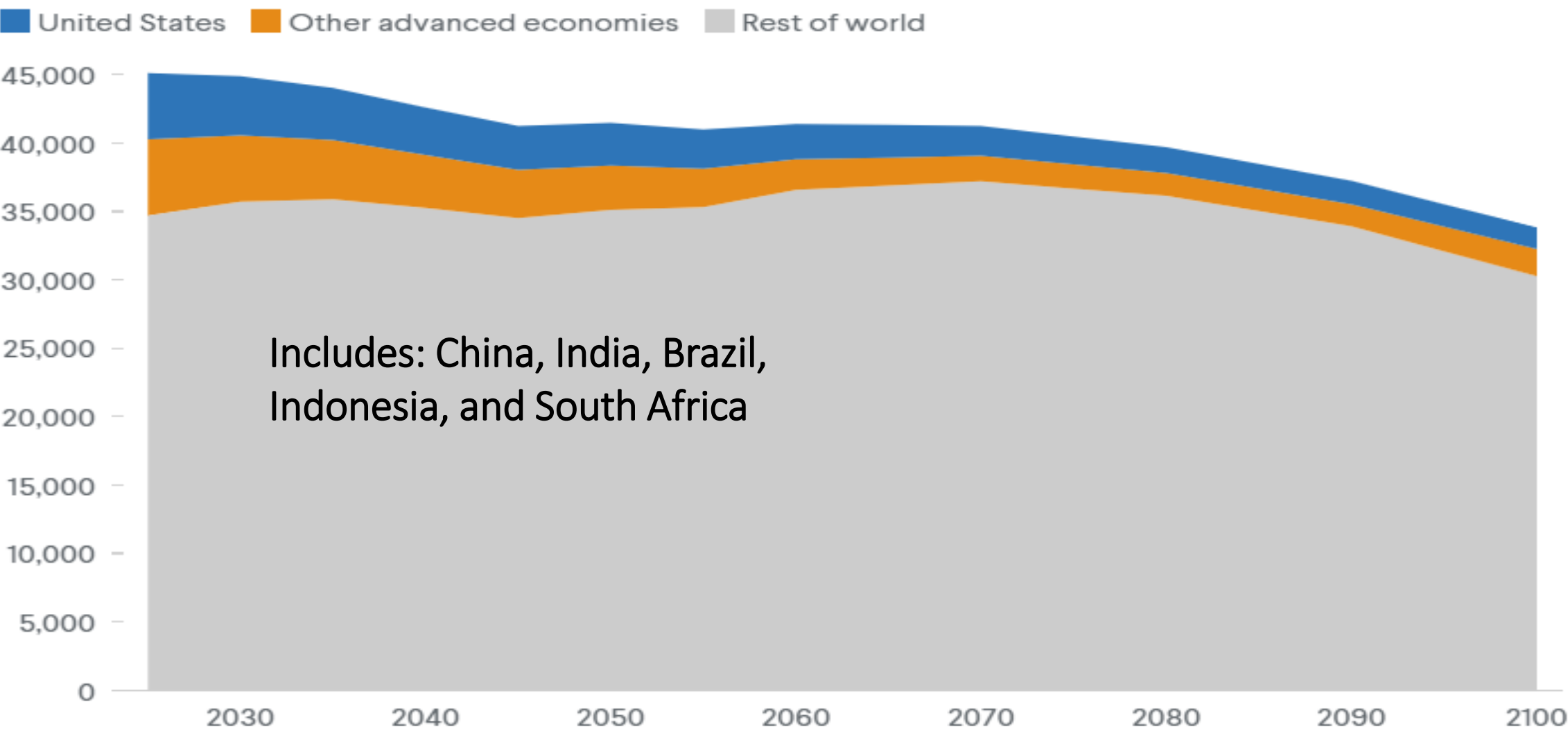


Net zero CO ₂ emissions by 2030	2050 CO ₂ (ppm)	2050 % Change	2050 Temp. Diff. (°C)	2040 % Change	2040 Temp. Diff. (°C)	2030 % Change	2030 Temp. Diff. (°C)
SSP2-4.5	498.8						
No U.S. Electricity	495.4	0.68%	0.015	0.45%	0.009	0.16%	0.002
No U.S. Emissions	487.4	2.29%	0.052	1.52%	0.030	0.55%	0.008

U.S. Emissions Shrinking Relative to Global Context Over Next 70 yrs

The Vast Majority of Future Emissions Will Come from China and Other Emerging Economies

Annual emissions with current policies (Mt of CO₂-equivalent)

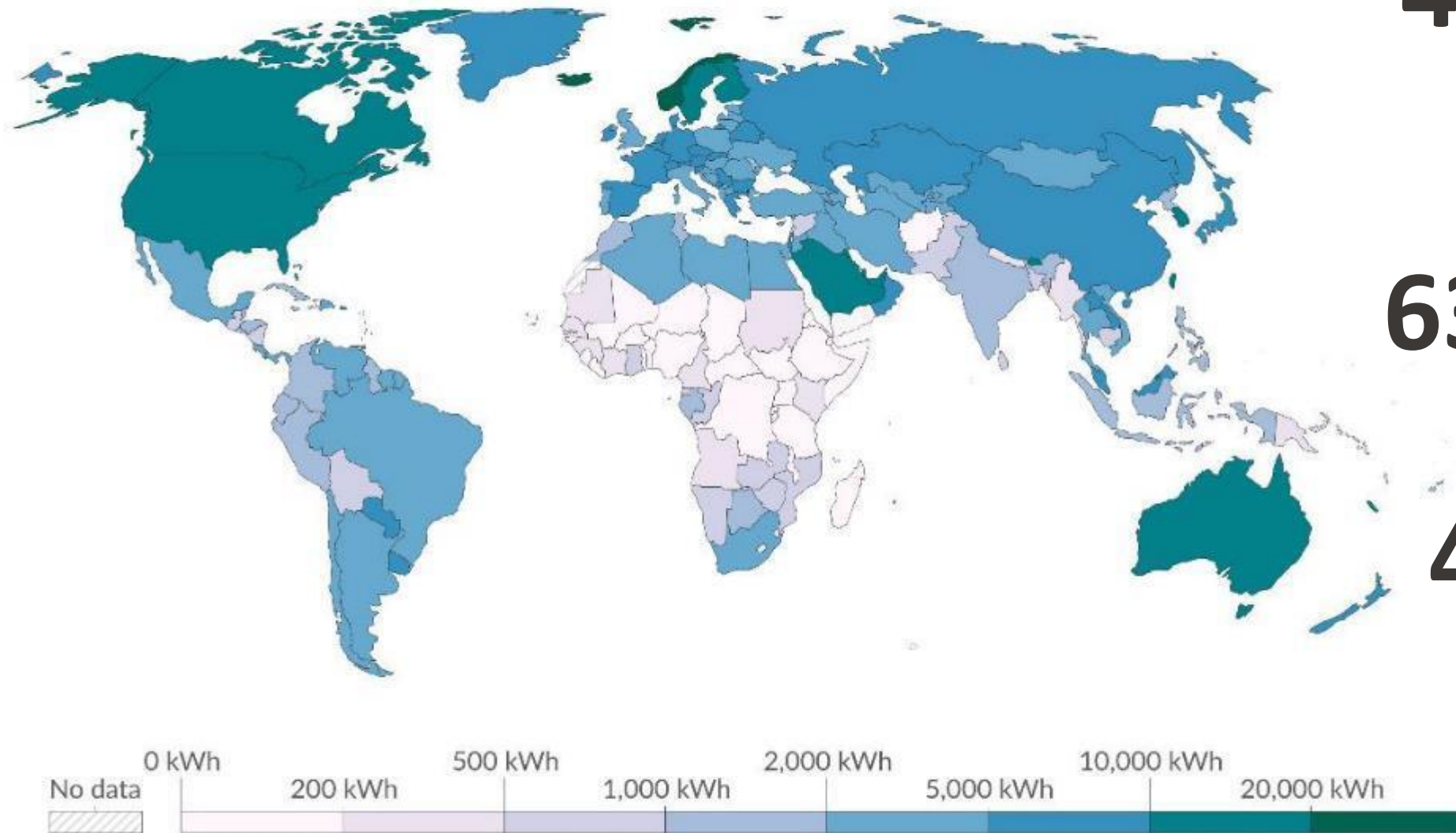


Source: NGFS Current Policies Scenario (2024, REMIND-MAgPIE 3.3-4.8 dataset).

Why the World Will Outpace Us by Orders of Magnitude in Electricity Consumption & GHG Emissions Growth: *They are Focused on Eradicating Energy Poverty Alongside our Global Rivals*

Per capita electricity generation, 2024

Annual average electricity generation per person, measured in kilowatt-hours¹.



Of the world uses less
47% power per year than the
average large U.S.
refrigerator (1,200 kWh/y)

63% Of the world is
energy starved
($<4,000$ kWh/y)

4x Global avg (3,500
kWh/y) would have to
quadruple to be at U.S.
levels (*which are still
rising with demand*)

Data source: Ember (2025); Energy Institute - Statistical Review of World Energy (2025); Population based on various sources (2024)

OurWorldinData.org/energy | CC BY



Energy Deprivation is an Immoral Climate Policy



- Human development is dependent upon access to affordable & reliable energy.
- Therefore, it is immoral for the developed world to withhold funding for fossil-fuel-related projects to developing nations when doing so deprives hundreds of millions of our fellow global citizens access to affordable & reliable energy.
- Funding is deprived even when carbon capture is involved despite the fact that, according to the IPCC, carbon capture is essential to every decarbonization scenario that does not deprive the developing world the ability to energize.

The world needs all sources of energy & advanced environmental technology, NOT anti-fossil fuel ideology.



Questions?