WEDNESDAY, OCT 28 | 1:30–2:30 PM | BREAKOUT 1

Geopolitics of Energy Supplies, Grid Components, Materials, and Cascading Impacts



MODERATOR

Maria Effertz

Director, Division of Community Services, ND Dept of Commerce



PRESENTER

Megan Levy

State, Local, Tribal, and Territorial Project Manager, Office of Cybersecurity, Energy Security, and Emergency Response, U.S. Department of Energy



PRESENTER

Bridget Bartol

Executive Director, Industry and Regulatory Affairs, Grid, National Electrical Manufacturers Association



PRESENTER

Mark Glick

Chief Energy Officer, Hawaii State Energy Office



PRESENTER

Sydney Gilliam

Practice Lead, IEM

Geopolitics of Energy and Materials: Supply Constraints and Cascading Impacts

Megan Levy, SLTT Program Manager

NASEO Annual Meeting 2026

Coordination in Steady State & During Energy Emergencies

State, Local, Tribal, and Territorial (SLTT) Governments

NASEO
National Association of State Energy Officials

National Association of Regulatory Utility Commissioners

American Public Power Association

NCSL

NEMA™

National Governors Association

Energy Government Coordinating Council (EGCC)



NASEO NARUC NGA

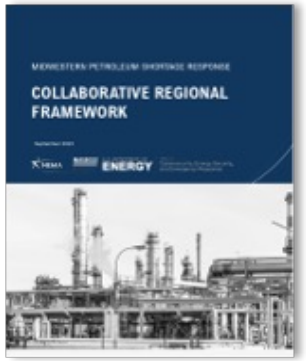
Industry Councils

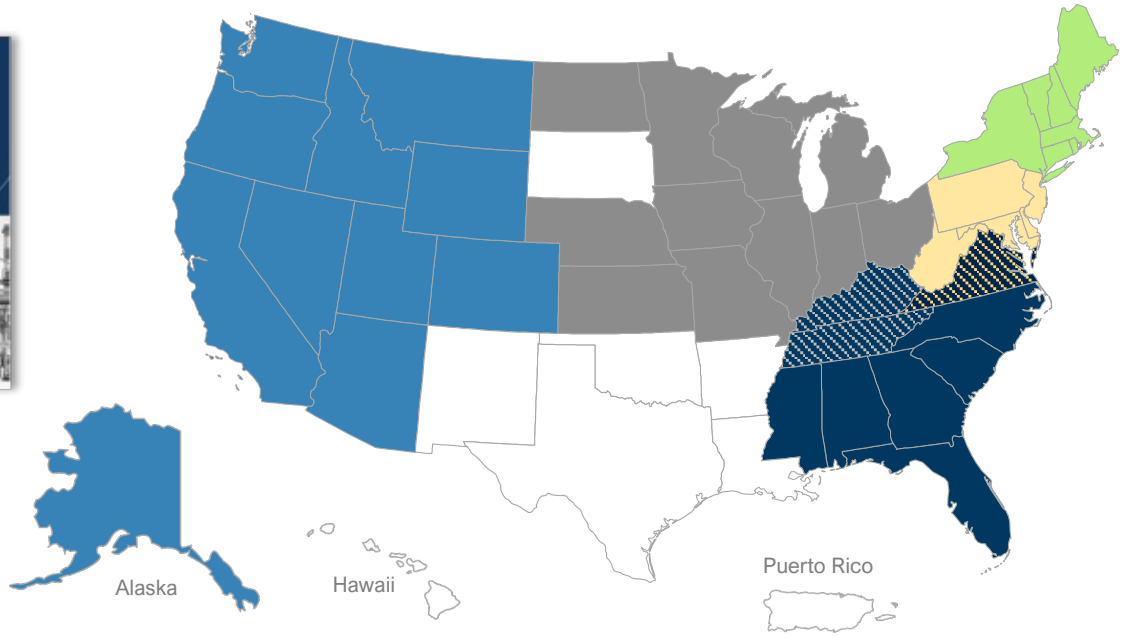
ESCC
Electricity Subsector Coordinating Council

Oil and Natural Gas Subsector Coordinating Council

Western, Midwestern, Southeastern and Northeast Regional Response Collaboratives- Coming Soon- Mid-Atlantic!

With the kick-off of the Mid-Atlantic Collaborative in 2027, DOE has supported 43 states and DC in critical planning and response activities





- Western Region
- Midwestern Region
- Southeastern Region
- Both Midwestern and Southeastern Members
- Northeast Regional Operational Coordination Collaborative (NEROCC)
- Mid-Atlantic Regional Operational Coordination Collaborative (MAROCC) – *coming soon!*
- Both Southeastern and Mid-Atlantic Members

CESER Cybersecurity Resources

Partners in Situational Awareness

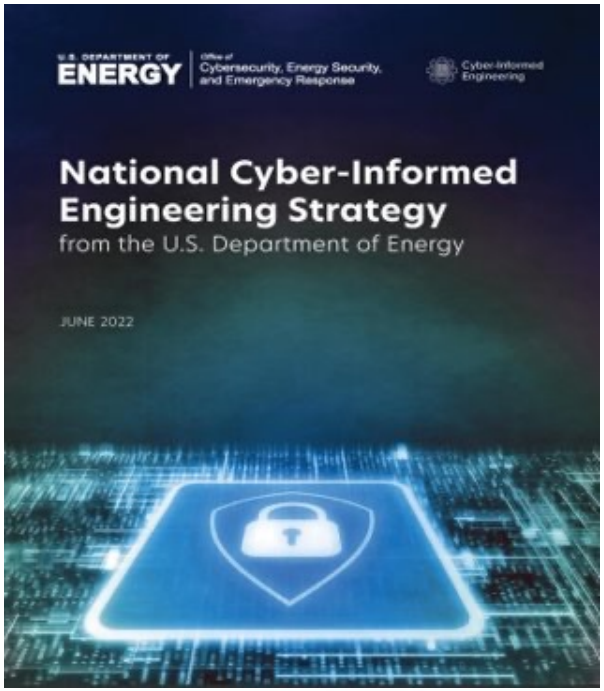
E-ISAC CRISP CYBERSECURITY RISK INFORMATION SHARING PROGRAM

Pacific Northwest NATIONAL LABORATORY

C2M2

Cybersecurity Capability Maturity Model

U.S. DEPARTMENT OF ENERGY • ENERGY THREAT ANALYSIS CENTER™



CyTRICS

INL Idaho National Laboratory

Lawrence Livermore National Laboratory

NREL Transforming ENERGY

OAK RIDGE National Laboratory

Pacific Northwest NATIONAL LABORATORY

Sandia National Laboratories

Liquid Fuels Shortage Risk Rubric

STATE/REGIONAL LIQUIDS FUELS RISK RUBRIC

	GASOLINE	ULSD	JET FUEL	KEROSENE	PROPANE
A. NEW ENGLAND INVENTORIES as of 11/18/22					
Inventories (mn bbls)	3.156	3.802	8.414*	0.039**	0.711
5-Year Average (mn bbls)	4.226	8.645	8.909*	0.301**	0.613
% Difference vs. 5-yr Avg.	-25%	-56%	-6%	-87%	+16%
Severity Points	2	3	0	3	0
B. PRICING – LOCAL PREMIUM VS. BENCHMARK ($/gallon) as of 11/22/22					
Local Rack Price	2.674 (Boston)	3.784 (Boston)	3.536 (NYH)	3.558 (NYH)***	1.133 (Selkirk)
Benchmark	2.437 (NYMEX)	3.375 (NYMEX)	2.929 (Gulf Coast)	2.931 (Gulf Coast)***	0.838 (Mt. Belvieu)
Difference	0.237	0.409	0.607	0.626	0.295
Severity Points	1	2	2	2	0
C. FUEL AVAILABILITY					
Status	No issues	No issues	No issues	Spot outages; widespread allocation	No issues
Severity Points	0	0	0	2	0
D. KEY INFRASTRUCTURE STATUS					
Fuels Infrastructure					
Terminals	No issues				
New England Ports	No issues				
Irving Oil St. John Refinery	No issues				
New York Harbor	No issues				
Railways	Potential Strike (Ethanol)				Potential Strike
Roadways	No issues				
Interdependent Infrastructure					
Algonquin Pipeline		No issues			
M&N Pipeline		No issues			
Everett LNG		No issues			
ISO-New England		No issues			
Severity Points	1	0	0	0	1
SEVERITY INDEX (A + B + C + D)					
Total Severity Points	4	5	2	8	0
Severity Level	Tier 3: Enhanced Watch	Tier 3: Enhanced Watch	Normal	Tier 2: Significant Event	Normal

*East Coast inventories; **As of August 31, 2022; ***Kerosene with 400 ppm sulfur limit

SEVERITY THRESHOLDS AND INDEX SCORING

1. For each fuel separately, assess the severity along the four key assessment areas using the following criteria.

Assessment Area	Severity Index	Criteria	Time Element
Inventories	Tier 1	50%+ below 5-year average	For 1+ weeks
	Tier 2	25-49.9% below 5-year average	
	Tier 3	10-24.9% below 5-year average	
Pricing (Gasoline, ULSD, Jet Fuel, Kerosene)	Tier 1	$1.00/gallon+ above benchmark	For 5+ days
	Tier 2	$0.25-0.99/gallon+ above benchmark	
	Tier 3	$0.10-0.24/gallon+ above benchmark	
Pricing (Propane)	Tier 1	$1.00/gallon+ above benchmark	
	Tier 2	$0.50-0.99/gallon+ above benchmark	
	Tier 3	$0.30-0.50/gallon+ above benchmark	
Availability	Tier 1	Widespread Outages	For 1+ weeks
	Tier 2	Spot Outages, Widespread Allocation	
	Tier 3	Spot Allocation	
Infrastructure	Tier 1	Long outage to one or more key assets	For 1+ weeks
	Tier 2	Short outage to one or more key assets	For <1 week
	Tier 3	Allocation or curtailment of customers to one or more key assets	For 1+ weeks

CUI//CRIT

1. Liquid Fuels Scorecard

As of October 16, 2026

	Refinery Gross Inputs	Gasoline		Distillate		Jet Fuel		Crude Oil	
	Inputs	Stocks	Imports	Stocks	Imports	Stocks	Imports	Stocks	Imports
	vs 5-yr avg	vs 5-yr avg		vs 5-yr avg		vs 5-yr avg		vs 5-yr avg	
PADD 1	+3.1%	-5.5%	**-31.8%**	**29.3%**	-27.0%	-0.8%	**-94.6%**	+8.4%	+0.2%
PADD 2	+5.4%	**-6.8%**		-8.0%		+5.8%		+2.6%	+4.9%
PADD 3	+13.2%	**-4.4%**		+5.5%		+3.3%		**-6.6%**	+12.7%
PADD 4	+13.8%	-3.3%		-1.6%		**-26.2%**		+1.6%	+13.2%
PADD 5	-1.9%	-1.0%	-1.1%	**-14.0%**	-21.3%	+9.2%	**-38.9%**	**-6.8%**	-16.3%
U.S.	**+8.8%**	**-4.7%**	**-29.3%**	**-9.0%**	**-11.0%**	**+3.6%**	**-61.0%**	**-3.7%**	**+2.6%**

*EIA Weekly Distillate Inventories do not account for renewable/biodiesel inventories. In PADD 5, California diesel supply has shifted to an increasing ratio of renewable diesel, so a significant proportion of the diesel pool is not represented in these stocks.

Note: Red values denotes if data point is below the seasonal 5-year range.

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U.S. DEPARTMENT of ENERGY | Office of Cybersecurity, Energy Security, and Emergency Response

CESER Cybersecurity Initiatives

- Energy Threat Analysis Center (ETAC): public-private partnership that convenes experts from DOE energy sector to collectively identify, analyze, and mitigate cyber threats to America's critical energy infrastructure.
- Cybersecurity Capability Maturity Model (C2M2): free tool to help organizations evaluate their cybersecurity capabilities and optimize security investments.
- Cyber Testing for Resilient Industrial Control Systems (CyTRICS): multi-laboratory supply chain risk management program partnering with industry to catalogue energy infrastructure and develop effective tools for securing critical components in the supply chain.
- Cyber-Informed Engineering (CIE): engineering approach that reduces the consequences of cyberattacks by designing systems so digital compromise cannot easily translate into physical harms.
- Cybersecurity Risk Information Sharing Program (CRISP): provide its participants with near real-time delivery of relevant and actionable threat information of their IT networks.

NEMA 100

NASEO Annual Meeting: Geopolitics of Energy Supplies, Grid Components, Materials, and Cascading Impacts

Bridget Bartol, Executive Director, Grid
NEMA Industry & Regulatory Affairs



October 28, 2026

Bridget.Bartol@nema.org

NEMA100

NEMA Members

NEMA represents over 300 electrical manufacturers that make safe, reliable, and efficient products and systems.

300+
Member companies

$376B
Contributed to the U.S. economy

590,000
American jobs directly provided

1%
of U.S. GDP comes from our members

- Built Environment
- Grid
- Industrial
- Mobility



NEMA's Grid Reliability Study

America's energy system faces dramatic changes over next 25 years



Unexpected Growth in Electricity Demand

Electricity demand will grow by **more than 55% by 2050**



Innovative Technologies To Meet Near-Term Demand

Urgent need to invest in technologies to meet coming demand in an all-of-the-above energy ecosystem



Policy Instructments Must Support America's Energy System

Critical new policies and regulatory certainty needed to deliver a flexible, stable, more resilient grid

U.S. Energy Demand Surge

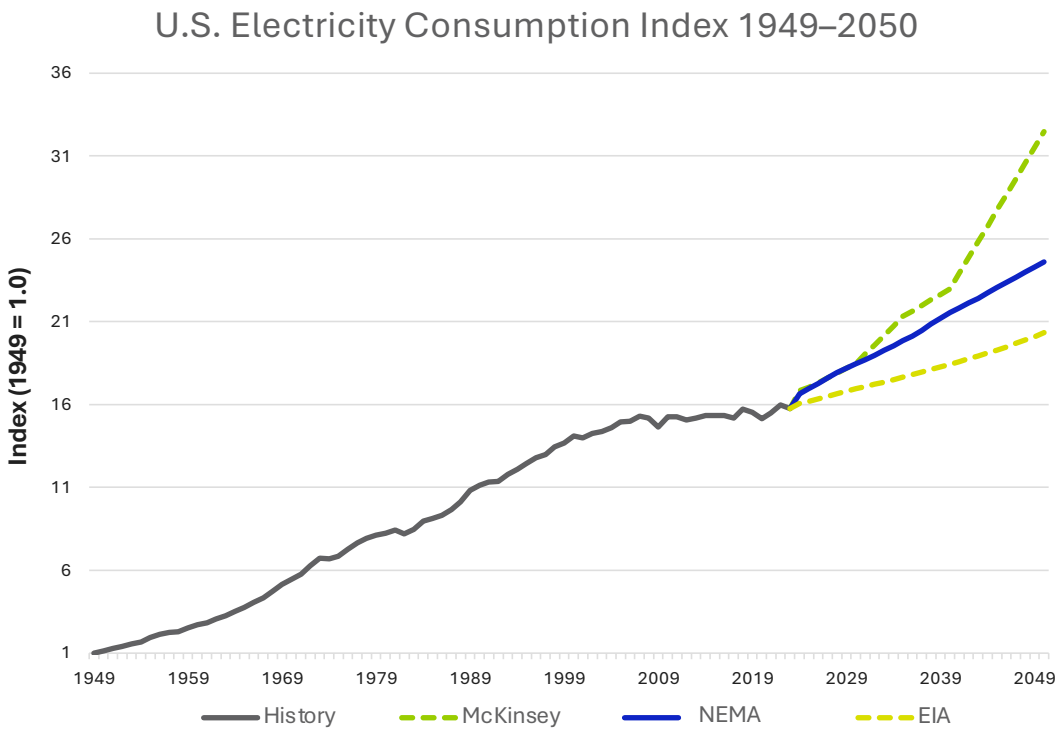
Load growth is back.

Electricity consumption is projected to grow in unprecedented ways

- **300%** projected growth in data center energy consumption over next 10 years
- **9000%** projected growth in E-mobility power consumption through 2050
- Electricity projected to grow from 21% of final energy use to **~32% by 2050**

Regionality in generation and consumption adds complexity

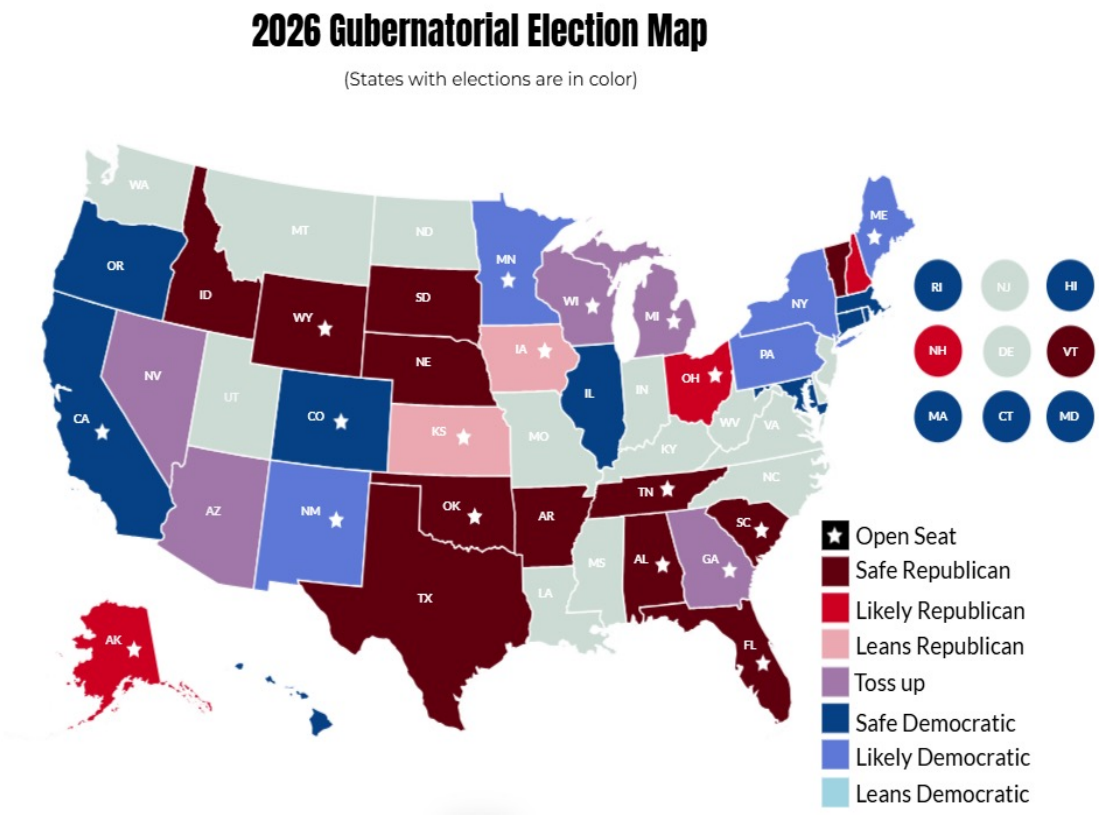
- Mid-Atlantic and Texas will see largest **data center** electricity demand growth through 2035
- Northeast and West will experience largest electricity demand growth from **EVs** through 2050
- Storage, wind, and solar generation will increase by **300%**
- Renewables will **exceed 50% of generation** capacity in Western U.S., New York, and Southeast



U.S. Energy Roadblocks & Opportunities

Infrastructure is Behind the Curve

- AI and data centers are accelerating planning uncertainty.
- Grid infrastructure is now a national economic issue.
- Distribution systems are becoming more important.
- Supply chain resilience remains a priority.
- Utilities and grid operators are having to evolve traditional approaches.

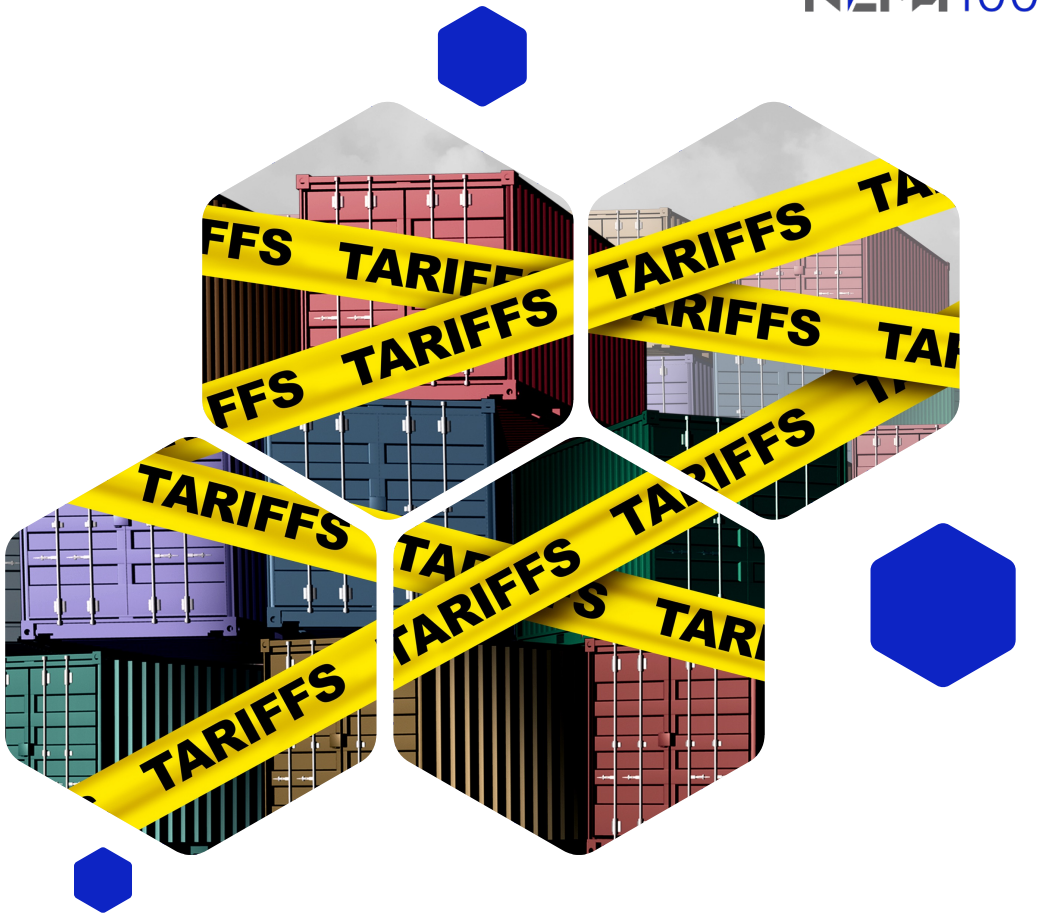


39 Gubernatorial Elections in 2026
21 incumbents are term-limited or not seeking reelection

Tariff Scramble

Since the beginning of the Trump Administration, there have been **more than 50 major changes to tariff rates**.

Electrical manufacturers have paid **11.4% of all duties paid**, many of which were not refundable under the Supreme Court's IEEPA decision.



National Policy Actions

The Trump Administration is using novel tools to ban imports of entire categories of products with the goal of reshoring domestic manufacturing.



FCC's Inverter Import Ban

Initially announced in July, this ban has been changed several times to reflect an evolving understanding of the underlying technology.



Bulk Power System

Announced in late August as a "National Emergency," this import ban is still being shaped by the Department of Energy.



UFPLA Enforcement

Announced in late August as a "National Emergency," this import ban is still being shaped by the Department of Energy.

Moving Forward with Certainty

States can engage manufacturers early in planning processes, transmission discussions, resilience programs, and procurement initiatives. Early engagement helps ensure that policy goals align with manufacturing realities and that deployment schedules reflect equipment availability.

Increase Flexibility



Encourage New Solutions

- Utilities
- Regulators
- Industrials
- Manufacturers

Save Energy



Detail the Savings

- Describe the lifecycle savings to regulators customers.
- Determine how utilities can highlight system savings for their ratepayer.

Secure Supply



Strategic Investment

- Pace of demand has strengthened and weakened supply chains.
- Global supply chains will remain, focus on consistent security.

Questions?

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NASEO Annual Meeting 2026

NASEO Geopolitics and Supply Chain - Hawai‘i’s Import Resilience Strategy & Toolkit

Mark Glick, Chief Energy Officer

October 28, 2026 – Bolder, Colorado

HAWAI‘I STATE ENERGY OFFICE

HAWAI‘I STATE ENERGY OFFICE

Overview

01 Hawai‘i Energy Ecosystem: Flowchart & Import Risks

02 HSEO’s Online Energy Dashboard

03 Energy Task Force – HSEO, HIEMA, OHS

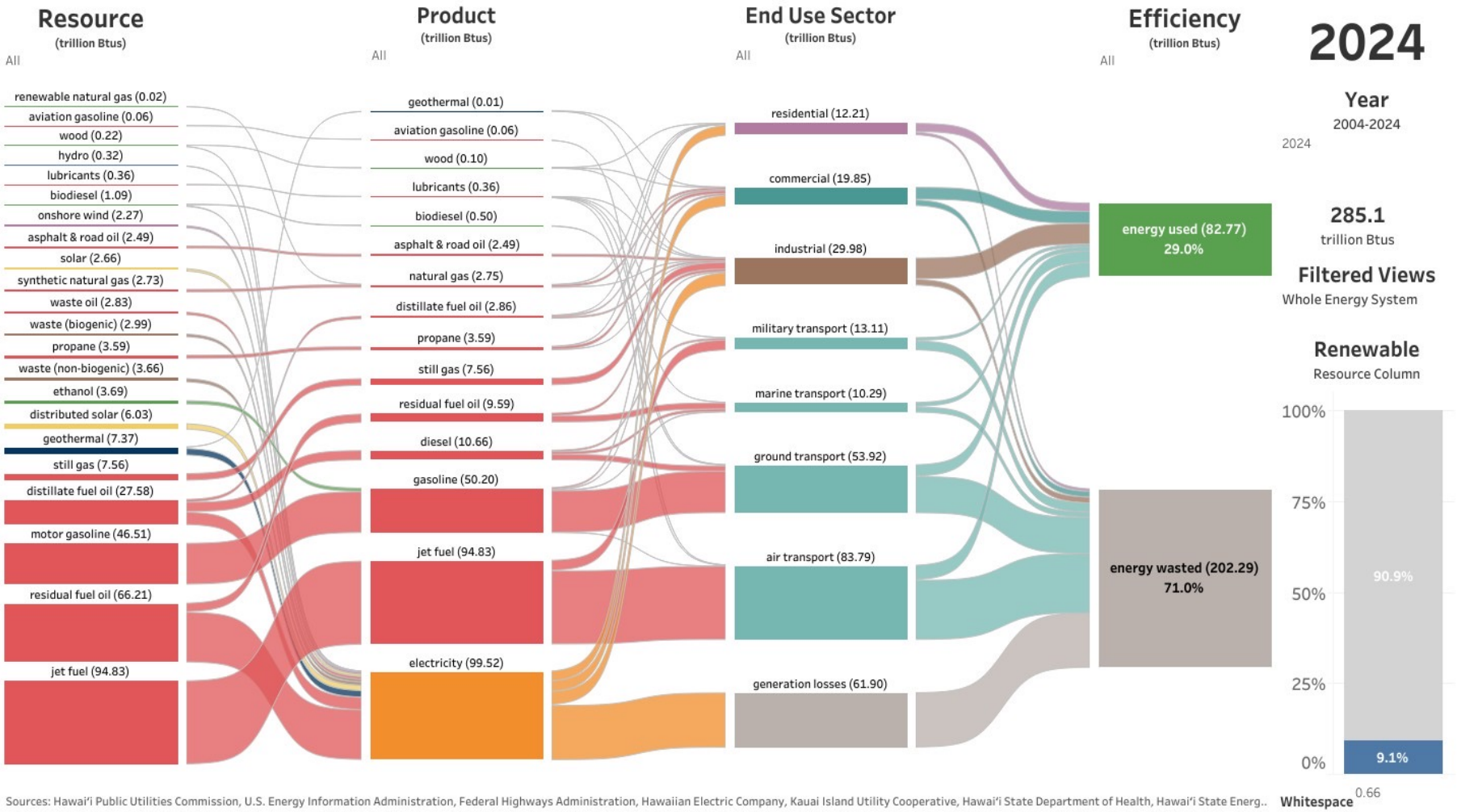
04 How Data & Communication Channels Inform Supply Adequacy

05 Next Big Thing: Geospatial Decision Support System (GDSS) project— Aligned with Critical Infrastructure Common Operating Picture (CI-COP)

HAWAI'I STATE ENERGY OFFICE

HAWAI'I STATE ENERGY OFFICE

Hawai'i Statewide Energy Flowchart



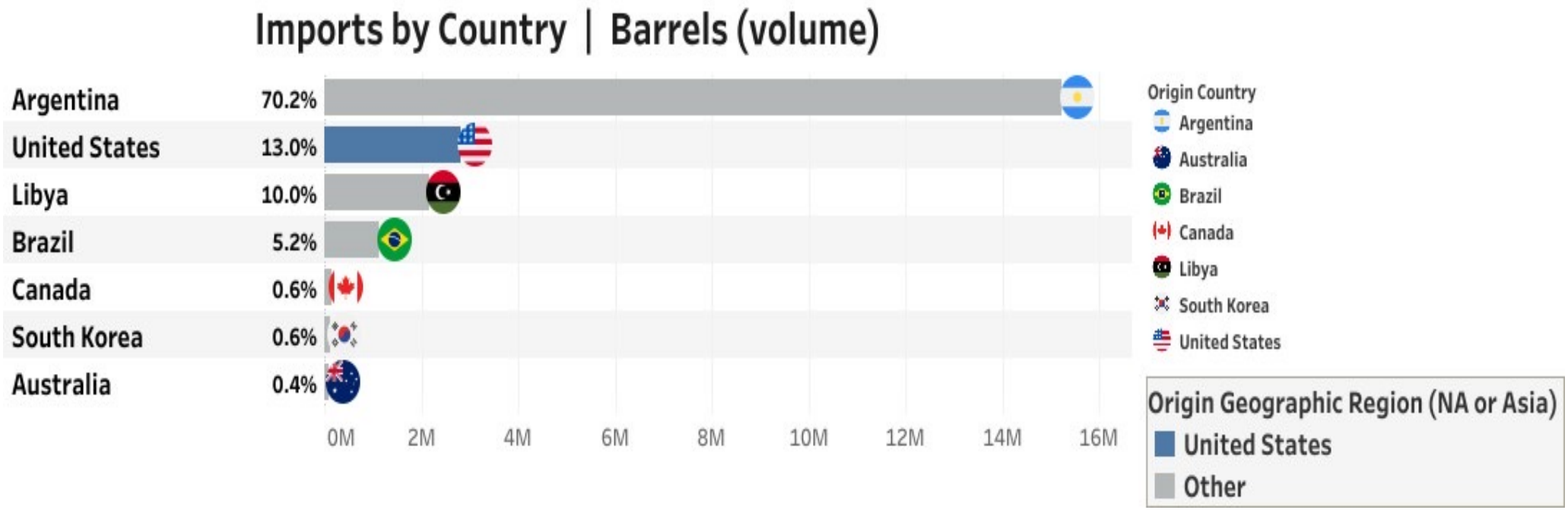
Sources: Hawai'i Public Utilities Commission, U.S. Energy Information Administration, Federal Highways Administration, Hawaiian Electric Company, Kauai Island Utility Cooperative, Hawai'i State Department of Health, Hawai'i State Energ..

Ground Transportation accounts for 23% (63.2 trillion Btu's) of the total 280.75 trillion Btu's of energy end-use in Hawaii during 2023.

Electricity is currently 33% of the energy mix, but could increase as much as 20% if all ground transportation is electrified.

HAWAI'I STATE ENERGY OFFICE

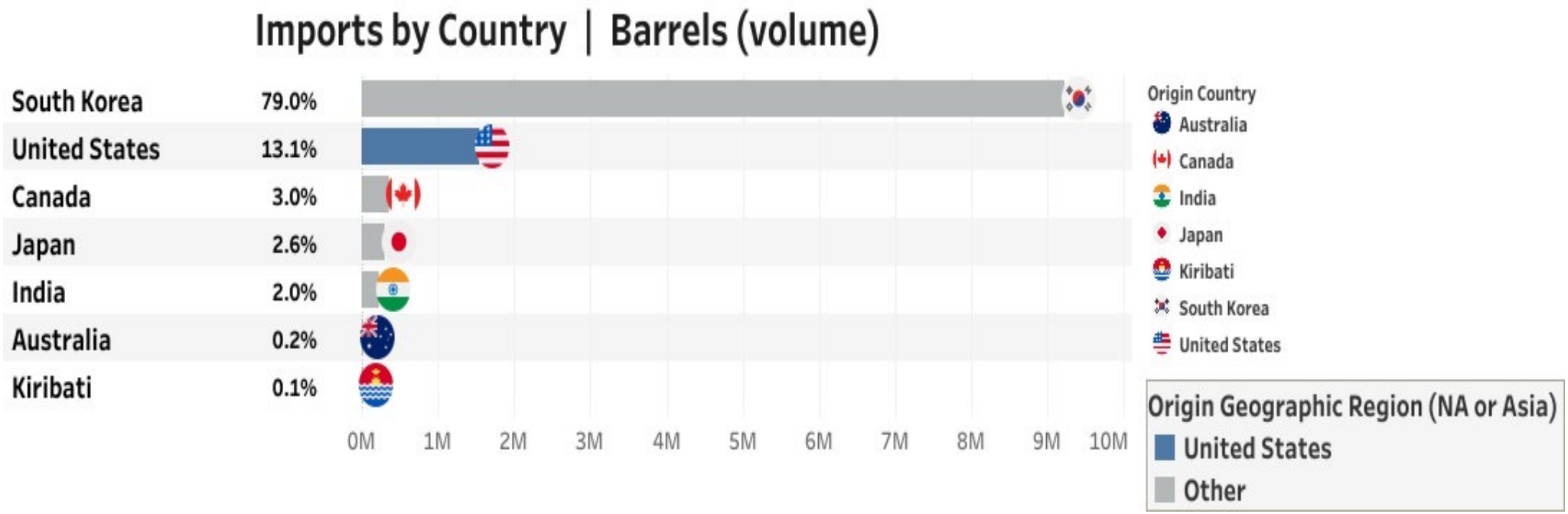
Electric Generation Fuel Imports: January thru October 2026



Source: Vortexa Flag Icon Credit: Flaticon Last Updated: October 19, 2026

HAWAI'I STATE ENERGY OFFICE

Transportation Fuel Imports: January thru October 2026



Source: Vortexa Flag Icon Credit: Flaticon Last Updated: October 19, 2026

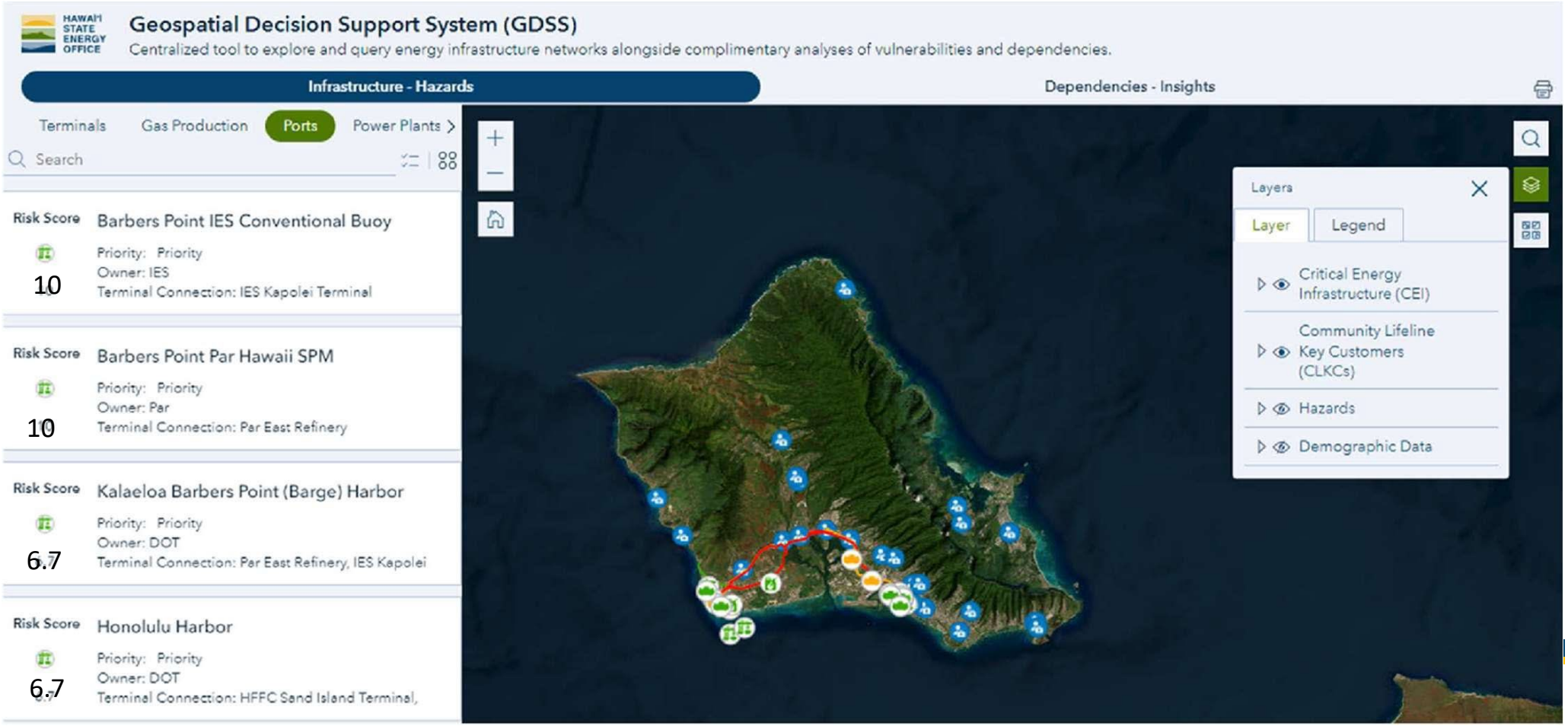
HAWAI'I STATE ENERGY OFFICE

Hawaii Energy Task Force

- Formed in 2025
- Promotes coordination during major energy shortage situations

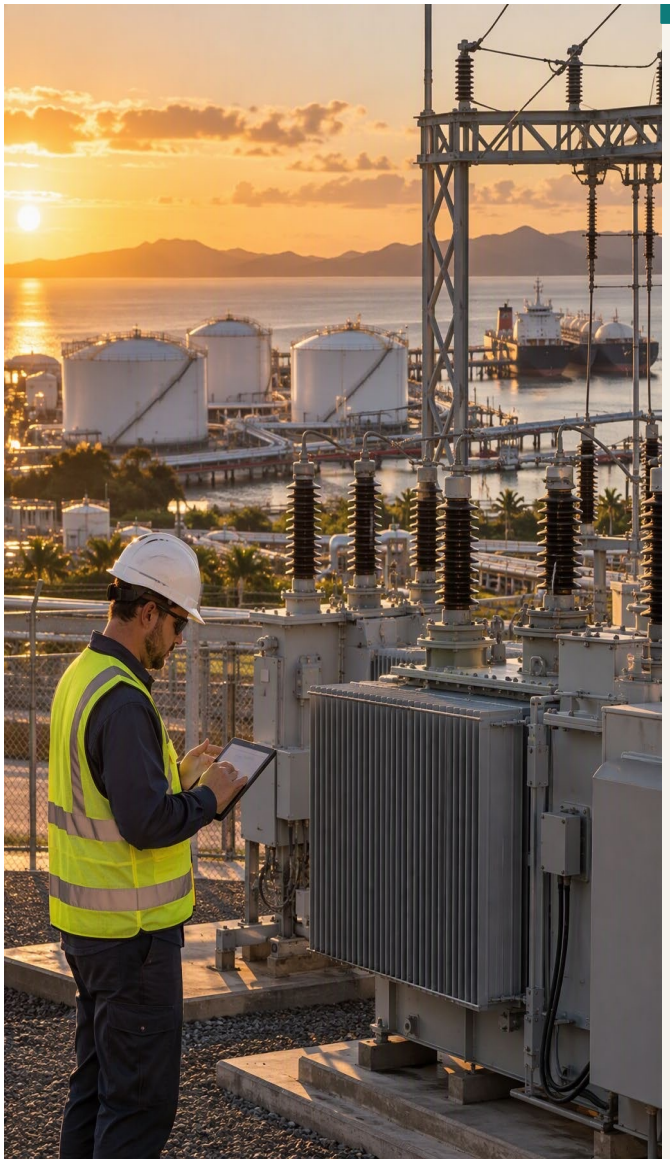


HSEO Energy Security Program - GDSS



“Hawai‘i’s energy transformation is not just a policy goal; it is a promise to our people and our future.”

Governor Josh Green, M.D.



GEOPOLITICS OF ENERGY SUPPLIES

IEM

Test What You're Counting On

The event may look familiar. The assumptions underneath it may not.

Availability
Will it be there when we need it?

Timing
Does it still arrive on the schedule we assumed?

Backup sources
Is the backup truly independent?

Outside capacity
Is someone else counting on it too?

Start with what you have

What do we know? What are we assuming? What haven't we verified?

Use what you have. Test what you're counting on.

Test It Before an Event Does

OREGON Asking the questions before an event

WHERE IT'S MADE

~90%

of refined fuel comes from refineries in Washington

HOW IT MOVES

~90%

of liquid fuel moves through one Portland hub

Consequence-based planning: start from what happens to people and services, then test the plan under today's conditions.

FINLAND When the backup got tested

MAY 2022
Russia cuts off electricity and pipeline gas

BACKUP IN PLACE
Gas shifts to a pipeline from Estonia; a second route by ship is secured

OCT 2023
The Estonia pipeline is damaged and out ~6 months; the ship route keeps gas flowing

Know what must keep working, what it depends on, and who controls it.

From Findings to Decisions

The Energy Office owns the planning question. Partners hold parts of the answer.

Suppliers & utilities | Manufacturers | DOE | Transportation | Emergency management | Regulators | Neighboring states

Fix it now

Confirm or correct an assumption with better information

Fix it with what you have

Use existing procedures, roles, contracts, and schedules

Make the case for more

Show what it costs and what it buys in reliability

Document it: the assumption, the evidence, and who confirmed it.

Then build it into your plans, procurement, and budgets.

Start With One Dependency

Understand
Pick one dependency tied to work already underway

Validate
Test the four assumptions with the partners who know

Act
Improve what you can; be clear about what needs more

Sustain
Revisit when suppliers, lead times, or events change

Use what you have. Test what you're counting on. Be clear about what needs to change.

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