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

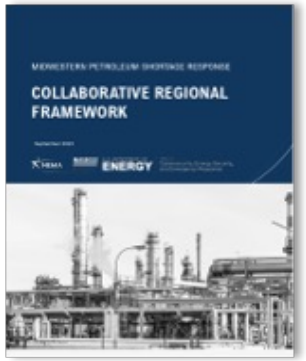
Industry Councils

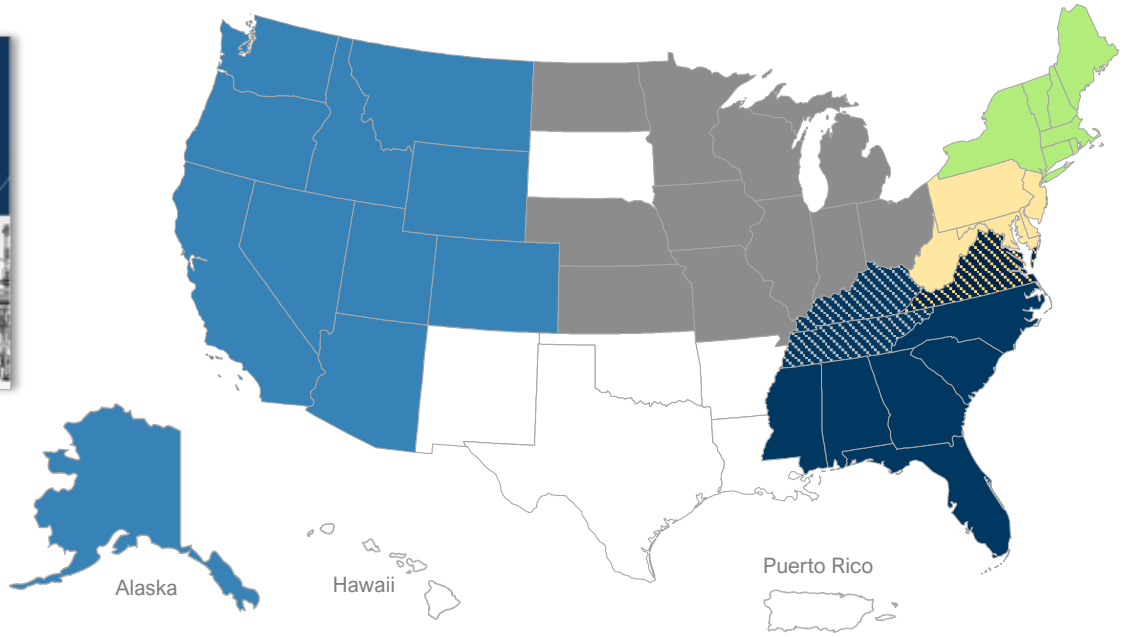
ESCC
Electricity Subsector Coordinating Council

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

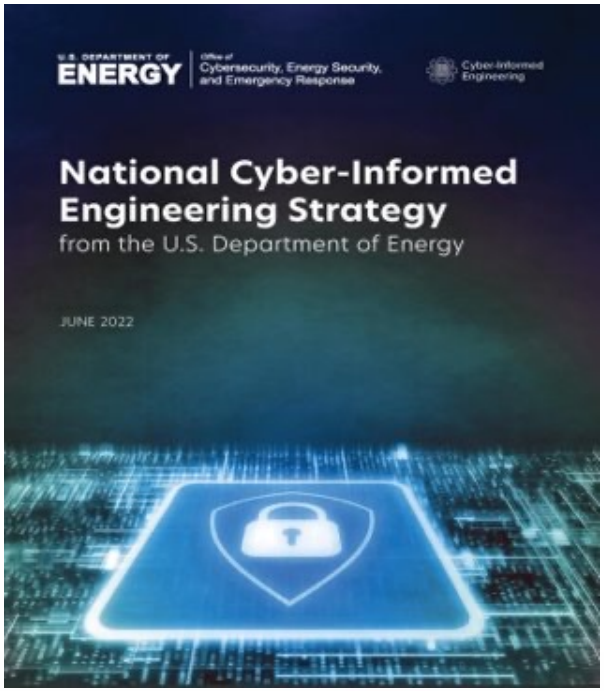
E-ISAC CRISP CYBERSECURITY RISK INFORMATION SHARING PROGRAM

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.