

2025 Report Card for America's Infrastructure

Energy

April 30, 2026





Agenda

- Overview of ASCE Report Card
- Panel Perspectives
- Q&A



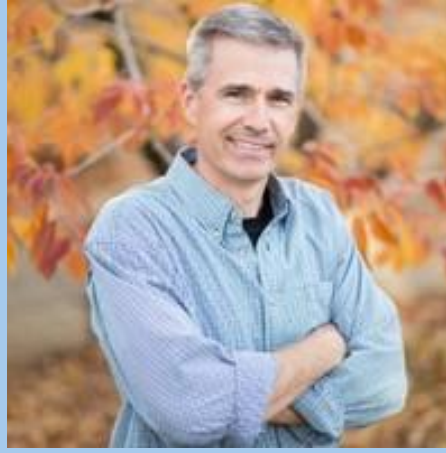
Speakers



Bill Pfister
Senior Director,
Business Analytics
& Finance, Edison
Electric Institute



Howard Gugel
Senior Vice
President,
Regulatory
Oversight,
North America
Electric Reliability
Corporation



Jim Lehan
Manager,
Transmission/Civil
Engineering,
Nevada Energy



Otto Lynch
Vice President,
Head of Power
Lines Systems,
Bentley
Systems/Power
Line Systems





Presentation FYI

- Webinar is being recorded
- Recording and slides will be made available
- Attendee input via typed questions
- Send any technical issues/questions through the chat function





2025 Report Card for America's Infrastructure - Energy

Otto J. Lynch, P.E., F. SEI, F. ASCE
Vice President, Head of Power Line Systems
Bentley Systems



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- LEVEES
- PUBLIC PARKS
- ROADS
- SOLID WASTE
- TRANSIT
- BRIDGES
- DAMS
- ENERGY
- INLAND WATERWAYS
- PORTS
- RAIL
- SCHOOLS
- STORMWATER
- WASTEWATER

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Summary

- Condition, Capacity, Operation & Maintenance
- Funding & Future Need
- Public Safety
- Resilience & Innovation
- Raising The Grade

Summary

As Americans increasingly depend on electrification in their daily lives, energy demand is experiencing its highest growth in two decades. An increase in electric vehicles (EVs) and a rise in data centers will demand 35 gigawatts (GW) of electricity by 2030 alone, up from 17 GW in 2022. This rapid acceleration, compounded by federal and state net-zero greenhouse gas emissions goals, means utilities will need to double existing transmission capacity to connect new renewable generation sources. Transmission investments have risen by \$5 billion from 2017 to 2022, and the Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) are supporting renewable technologies and grid hardening measures. New investments come as weather accounts for 80% of electricity outages since 2000, most of which occurred in the last decade and within distribution systems that deliver power in the last miles from transmission systems to homes and businesses. Interregional connections accelerated by streamlined regulatory review, rigorous design standards, and resilient technologies must be implemented to ensure reliability in the years ahead.

Energy - 2025 Report Card for America's Infrastructure

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Energy Fact Sheet

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Energy - 2025 Report Card for America's Infrastructure

Electricity

2013 2023

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Energy Fact Sheet

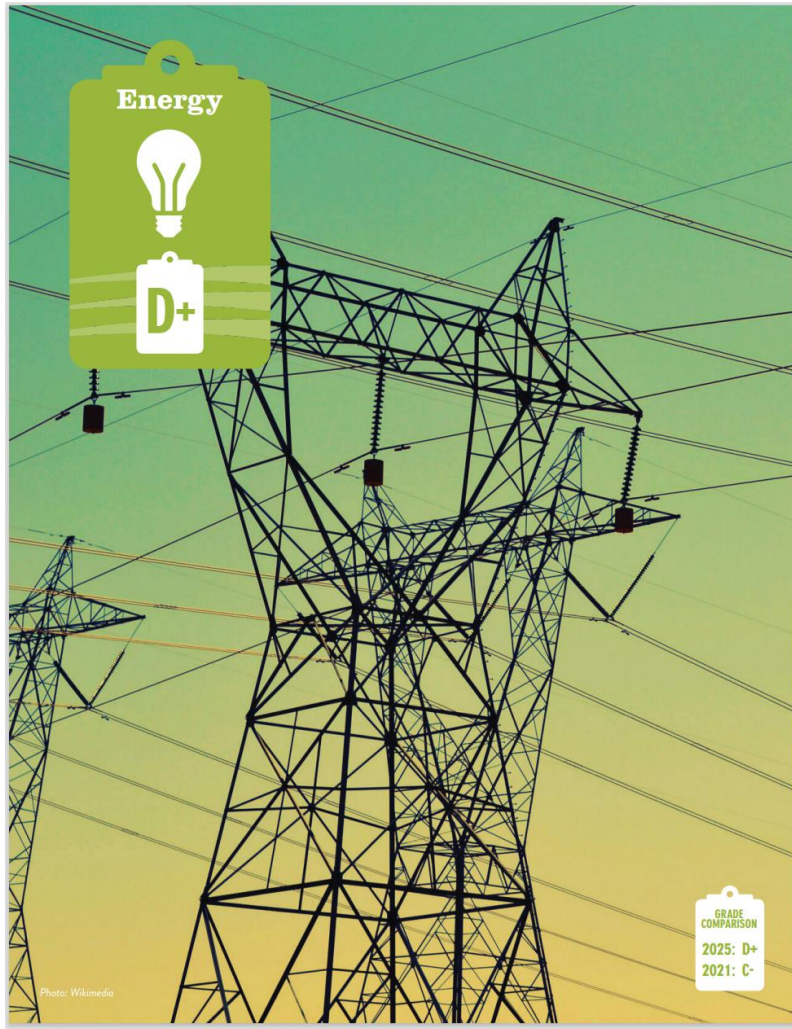
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Energy

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EXECUTIVE SUMMARY

As Americans increasingly depend on electrification in their daily lives, energy demand is experiencing its highest growth in two decades.¹ An increase in electric vehicles (EVs) and a rise in data centers will demand 35 gigawatts (GW) of electricity by 2030 alone, up from 17 GW in 2022.² This rapid acceleration, compounded by federal and state net-zero greenhouse gas emissions goals, means utilities will need to double existing transmission capacity to connect new renewable generation sources. Transmission investments have risen by \$5 billion from 2017 to 2022,³ and the Infrastructure Investment and Jobs Act (IIJA) and Inflation Reduction Act (IRA) are supporting renewable technologies and grid hardening measures. New investments come as weather accounts for 80% of electricity outages since 2000, most of which occurred in the last decade and within distribution systems that deliver power in the last miles from transmission systems to homes and businesses.⁴ Interregional connections accelerated by streamlined regulatory review, rigorous design standards, and resilient technologies must be implemented to ensure reliability in the years ahead.

BACKGROUND

U.S. energy infrastructure consists of facilities and related infrastructure needed to generate electricity from various sources (natural gas, petroleum, coal, solar, wind, nuclear, hydroelectricity), and transmission and distribution (T&D) networks needed to move this energy from its source to communities nationwide. To best serve the needs of the public, balanced investments in both generation and T&D systems are essential to ensure reliable performance. These investments, largely driven by user rates, can prevent disruptions to energy services that have become critical to the nation's safety, health, and economic efficiency. Energy interruptions bear significant costs on U.S. industries and consumers, as even a brief power outage increases production costs and disrupts supply chains.⁵




Photo: Summit Art Creations

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2025 Report Card for America's Infrastructure



AVIATION

D+



BRIDGES

C



BROADBAND

NEW

C+



DAMS

↑ D+



DRINKING WATER

C-



ENERGY

↓ D+



HAZARDOUS WASTE

↑ C



INLAND WATERWAYS

↑ C-



LEVEES

↑ D+



PARKS AND RECREATION

↑ C-



PORTS

↑ B



RAIL

↓ B-



ROADS

↑ D+



SCHOOLS

D+



SOLID WASTE

C+



STORMWATER

D



TRANSIT

↑ D



WASTEWATER

D+

America's
Cumulative
Infrastructure
Grade



A EXCEPTIONAL

B GOOD

C MEDIOCRE

D POOR

F FAILING

What the Grades Mean



MEDIOCRE
Requires attention



EXCEPTIONAL
Fit for the future



POOR
At risk



GOOD
Adequate for now



FAILING/CRITICAL
Unfit for purpose

Methodology

CAPACITY

OPERATION AND MAINTENANCE

CONDITION

PUBLIC SAFETY

FUNDING

RESILIENCE

FUTURE NEED

INNOVATION

Investment Gap

Infrastructure System	TOTAL NEEDS	FUNDED	FUNDING GAP
AVIATION	\$310	\$197	\$113
BRIDGES	\$538	\$165	\$373
BROADBAND	\$61	\$61	\$0
DAMS	\$185	\$20	\$166
DRINKING WATER	\$670	\$361	\$309
ENERGY	\$1,886	\$1,308	\$578
HAZARDOUS & SOLID WASTE	\$162	\$146	\$16
INLAND WATERWAYS & PORTS	\$45	\$32	\$13
LEVEES	\$97	\$7	\$91
PUBLIC PARKS	\$106	\$62	\$44
RAIL	\$145	\$113	\$32
ROADS	\$2,233	\$1,549	\$684
SCHOOLS	\$1,100	\$671	\$429
TRANSIT	\$618	\$466	\$152
WASTEWATER + STORMWATER	\$983	\$293	\$690
TOTALS	\$9,139	\$5,450	\$3,689

\$3.7
Trillion
needed



CURRENT
FUNDING

FUNDING
GAP



**Sustaining
Investment**



**Prioritizing
Resiliency**



**Advancing
Policy &
Innovation**

Grading Energy


2021 Grade = C-

2025 Grade = D+

- Condition:



- 2011–2020: 3,300 miles/year of regional transmission built vs. 70 miles/year of interregional lines.
- About half of U.S. gas pipelines date to the 1950s–60s, underscoring the need for maintenance, upgrades, and expansion.

- Capacity: 
 - Peak electricity demand is rising faster than in a decade; summer peaks +10% by 2032, while supply grows only +4%.
 - Data center load expected to reach 35 GW by 2030 (17 GW in 2022).
 - Distribution transformer capacity must grow 160–250% by 2050, but backlogs already strain current needs.

• Funding: 

- IRA (2022): \$386B for climate and energy, mostly via clean-energy tax credits.
- Investor-owned utilities spent \$26.7B on transmission in 2022; projected \$121B total (2023–2026).

• Future Need: 

- Even with IIJA/IRA renewal, the sector faces a \$578B investment gap by 2033; \$702B if funding reverts to pre-IIJA/IRA levels.

• Operation and Maintenance:

- Interregional transmission expansion underway, including \$1.3B IJJA investment for three multi-state lines.
- LIDAR helps reduce vegetation-related outages.
- Transformer shortages threaten long-term reliability.

• Public safety:

- Serious pipeline incidents trending downward: 266/year (2021–23) vs. 280 (5-yr avg) and 294 (10-yr avg).
- 95 human-related grid disturbances in early 2023—the highest six-month total this century.

- Resilience: 

- 34% of transmission and 37% of distribution spending in 2022 went to resilience and hardening.
- Weather-related outages doubled in 2014–23 vs. 2000–09.
- Undergrounding (e.g., PG&E's 10,000-mile plan) can cut wildfire risk by up to 98%, though costly and location-dependent.

- Innovation: 

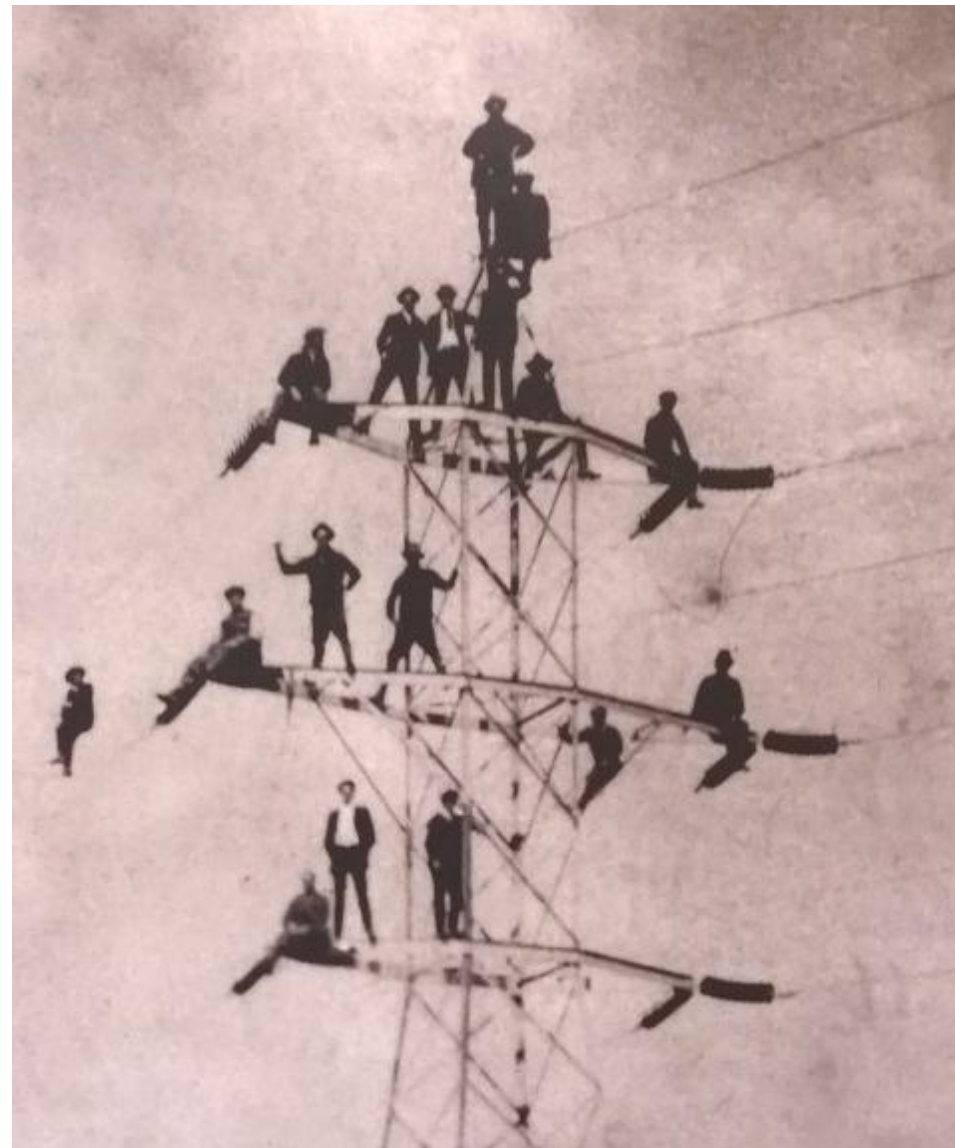
- GRIP Smart Grid Grants: \$3B for 34 projects.
- AI can forecast loads, optimize renewable output, automate switching, and detect cyber threats.

Recommendations to Raise the Grade

- Add state coordinators to guide utilities through federal grants.
- Align rates with capital and resilience needs.
- Build additional transmission and use life-cycle cost analysis.
- Create a national hardening plan for generation, T&D, and pipelines.
- Pair major projects with adequate storage.
- Increase asset inspections and risk mitigation.
- Establish a national transformer reserve.
- Require adoption of stringent consensus-based codes and standards.
- Develop a federal energy policy addressing technology change, carbon goals, distributed generation, and affordability.

State of the Overhead Power Line Industry

- We are in the midst of a “Perfect Storm” in our Nation’s Electric Infrastructure
 - Aging Infrastructure
 - Infrastructure Under Designed
 - Increasing Demand
 - Shifting Generation Locations
 - Increased Difficulty in Permitting
 - Increasing Weather / Climate Change
 - Increased Public Expectations of Reliable Electricity
 - We Need to “Rewire America”



State of the Overhead Power Line Industry







The Perfect Storm



Making the Grade: Energy - ASCE 2025 Report Card

Bill Pfister

Senior Director, Business Analytics & Finance

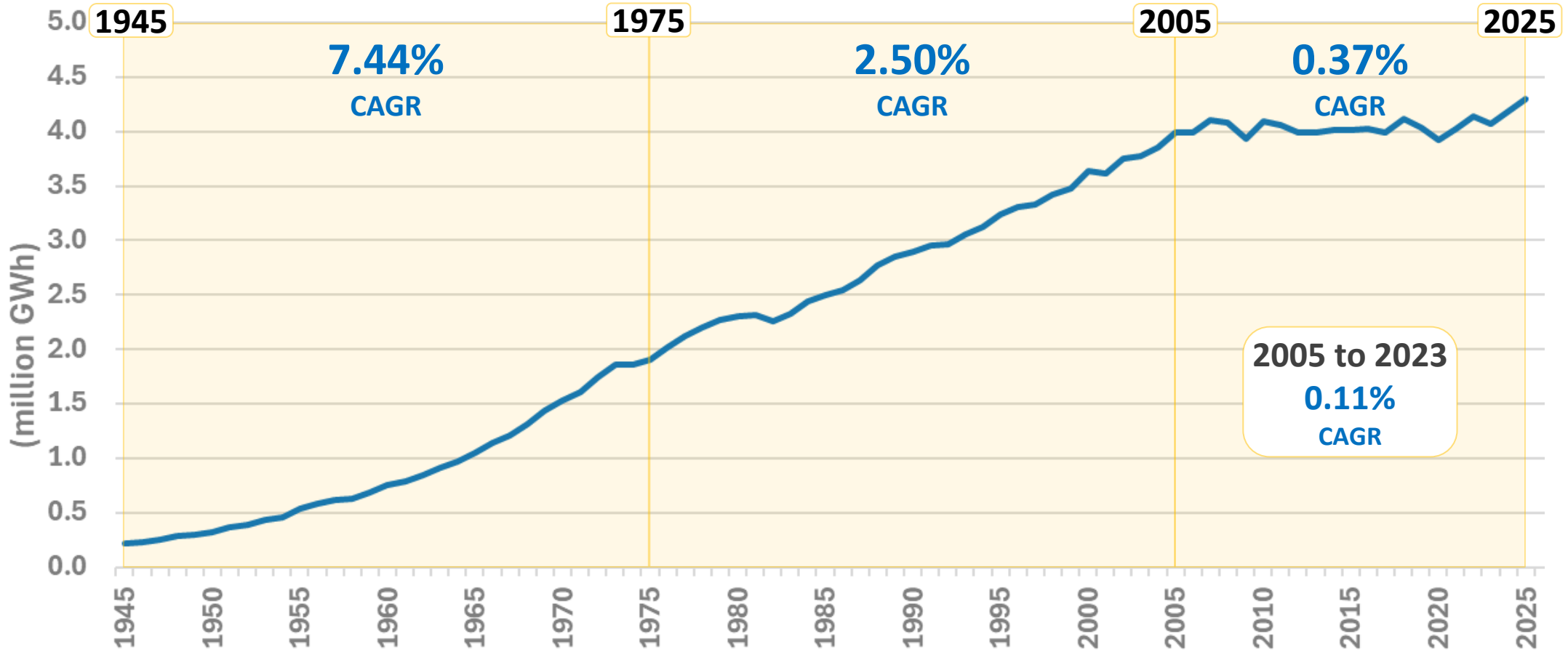
EEI is the association that represents all U.S. investor-owned electric companies.

- ▶ Our members serve **nearly 3 in 4 Americans.**
- ▶ Every day, we connect **more than 3,200 new residential customers and nearly 200 new businesses** to the grid.
- ▶ Our industry supports more than **7 million U.S. jobs**, representing **5% of GDP.**



Unprecedented Changes in Electric Demand

U.S. Electric Output (million GWh)



Notes: Total U.S. electric output for the contiguous United States.

Source: EEI Weekly Electric Output, EEI Business Analytics.



Unprecedented Investment in Energy Infrastructure

\$ Billions

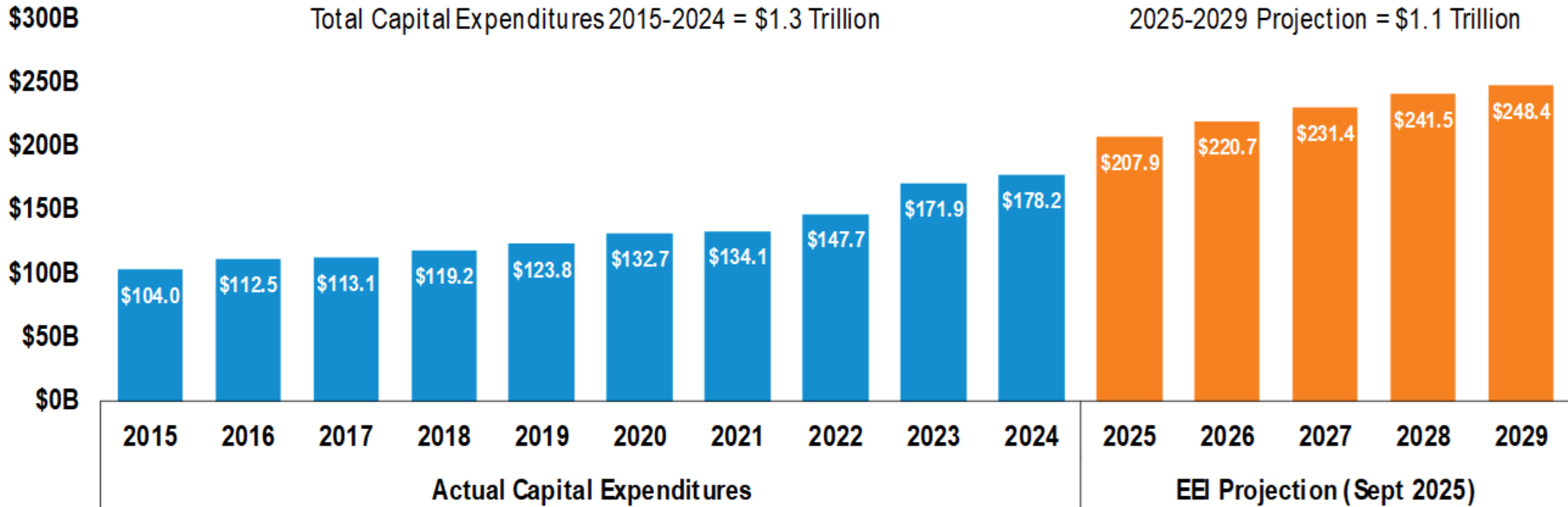


Chart represents total capital expenditures of U.S. Investor-Owned Electric Utilities, consolidated at the parent or appropriate holding company level.
Source: EEI Financial Analysis, EEI member company reports (updated September 2025).



Projected Capital Expenditures by Function

U.S. Investor-Owned Electric Utilities
\$ Billions

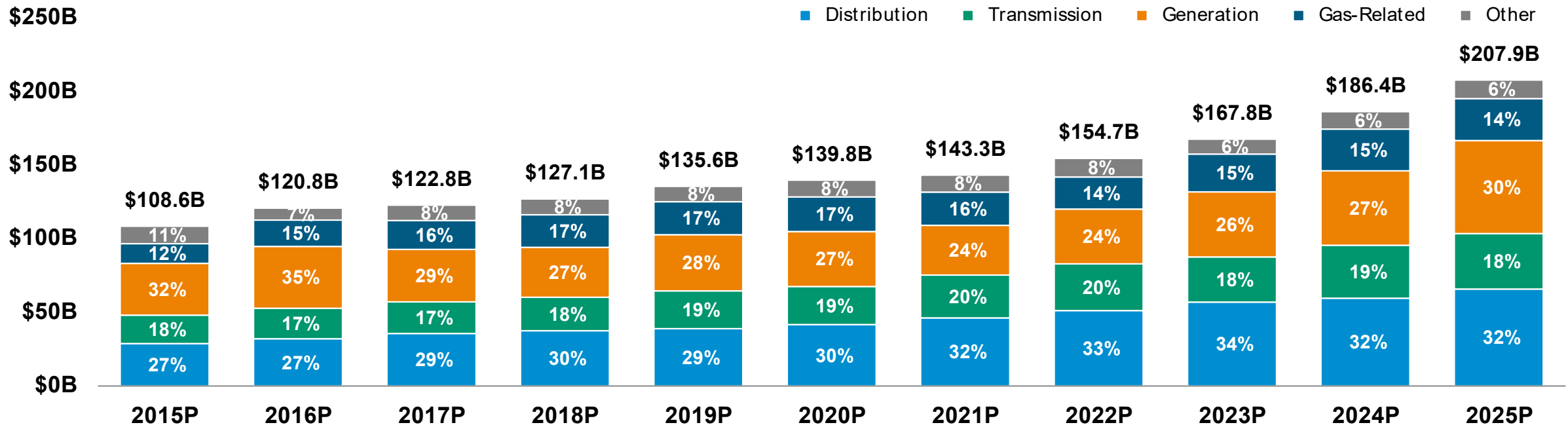


Chart represents projected total functional capital expenditures of U.S. Investor-Owned Electric Utilities. Years may not sum to 100% due to rounding.

Each annual functional projection is compiled during the calendar year for which it is reported and is not revised to align with actual totals.

Therefore, the projected total dollar amounts on the functional chart do not align with the actual reported totals on the industry capital expenditures chart.

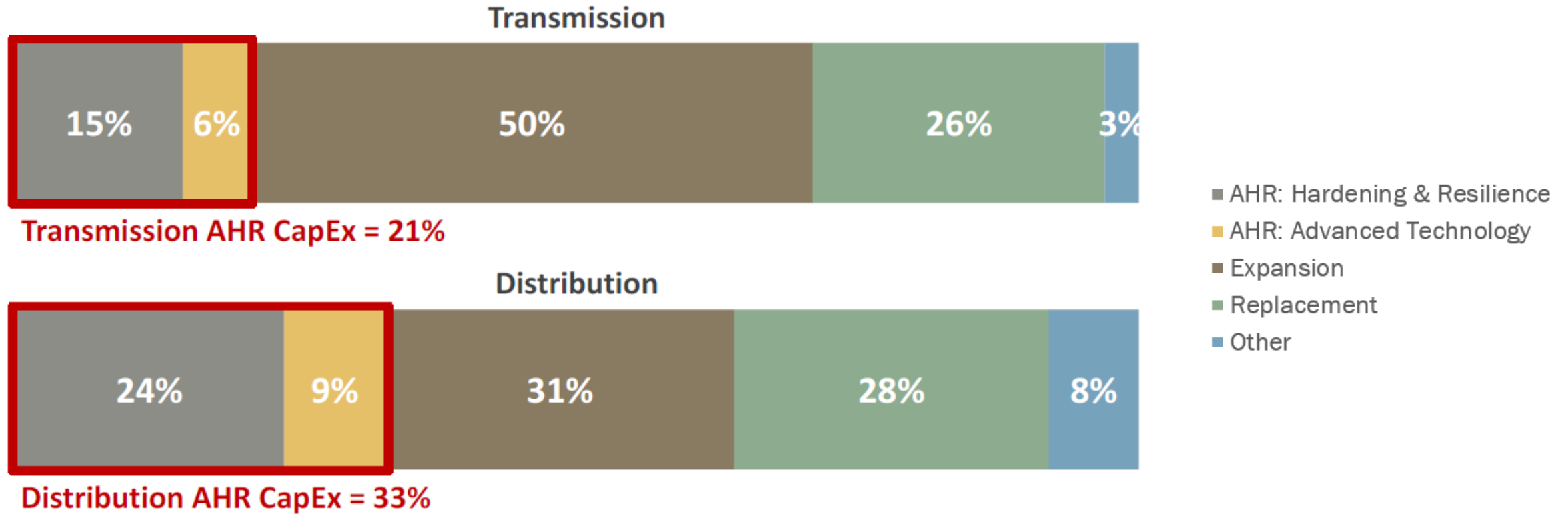
Gas-related includes investments in natural gas delivery and natural gas pipeline infrastructure but not natural gas-fired electric generation.

Source: EEI Financial Analysis Department, EEI member company reports (2025P as of September 2025).

AHR as a Driver of Future Electric T&D Investment

Investment

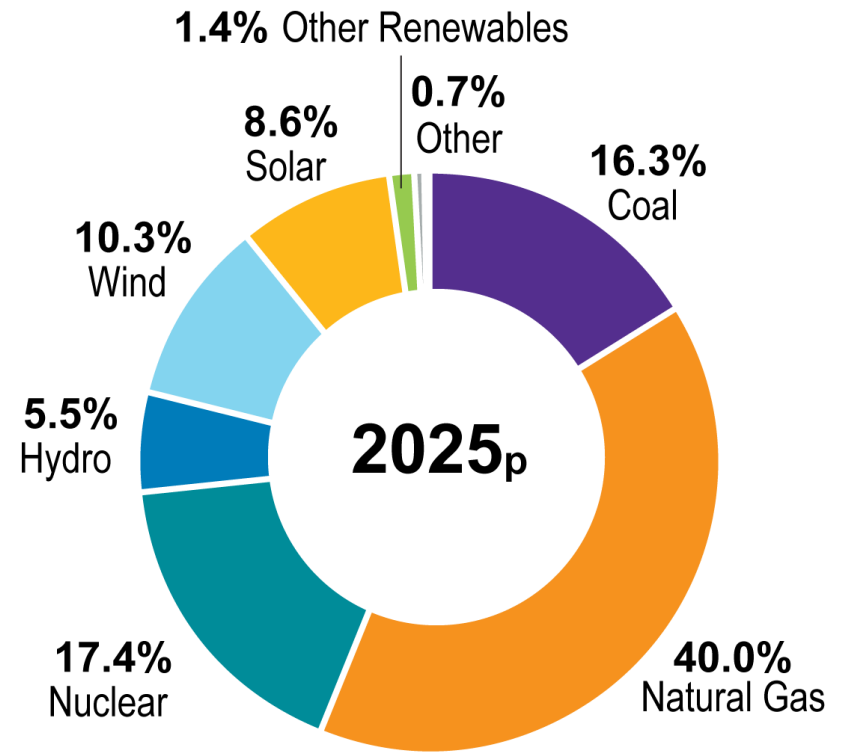
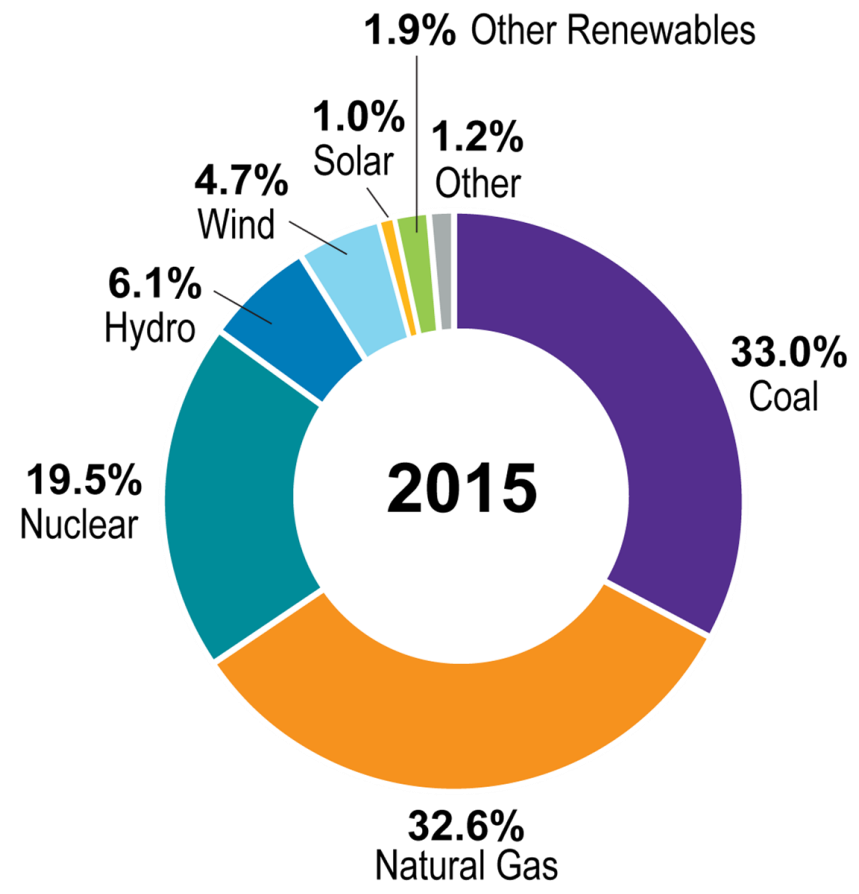
Adaption, Hardening, and Resilience



Note: Due to rounding, the percentages may not add to Transmission and Distribution totals shown.

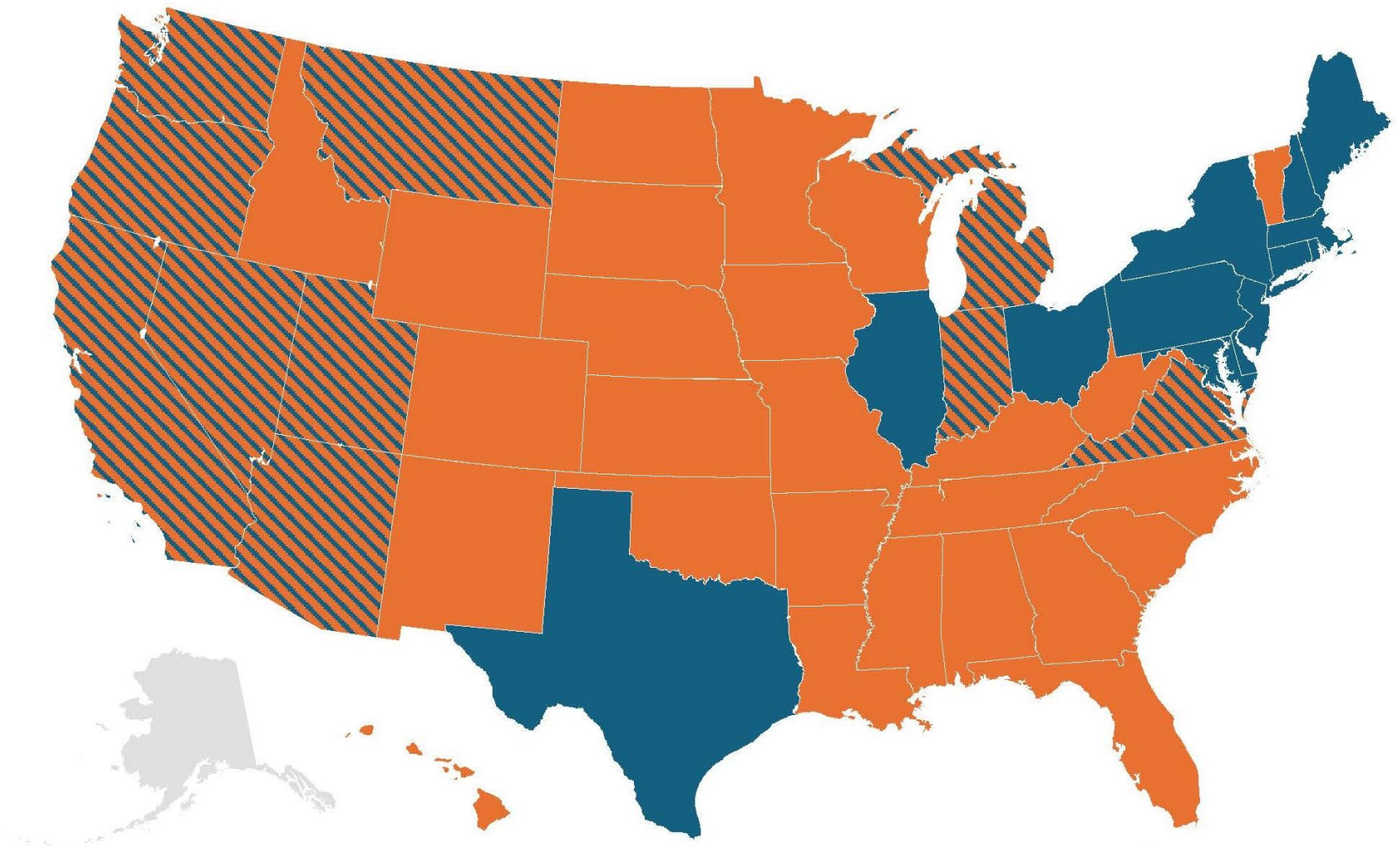
Source: EEI Financial Analysis and Business Analytics, EEI member company survey (2025).

Transforming the Energy Mix



p = Preliminary.
Notes: "Other Renewables" includes geothermal and generation from biomass sources (agricultural waste, landfill gas recovery, municipal solid waste, wood, non-wood waste).
"Solar" includes universal (or large-scale) solar and private (or rooftop) solar. Percentages may not add to 100.0% due to independent rounding.
Source: U.S. Department of Energy, Energy Information Administration; EEI Business Analytics.

State Regulatory Status

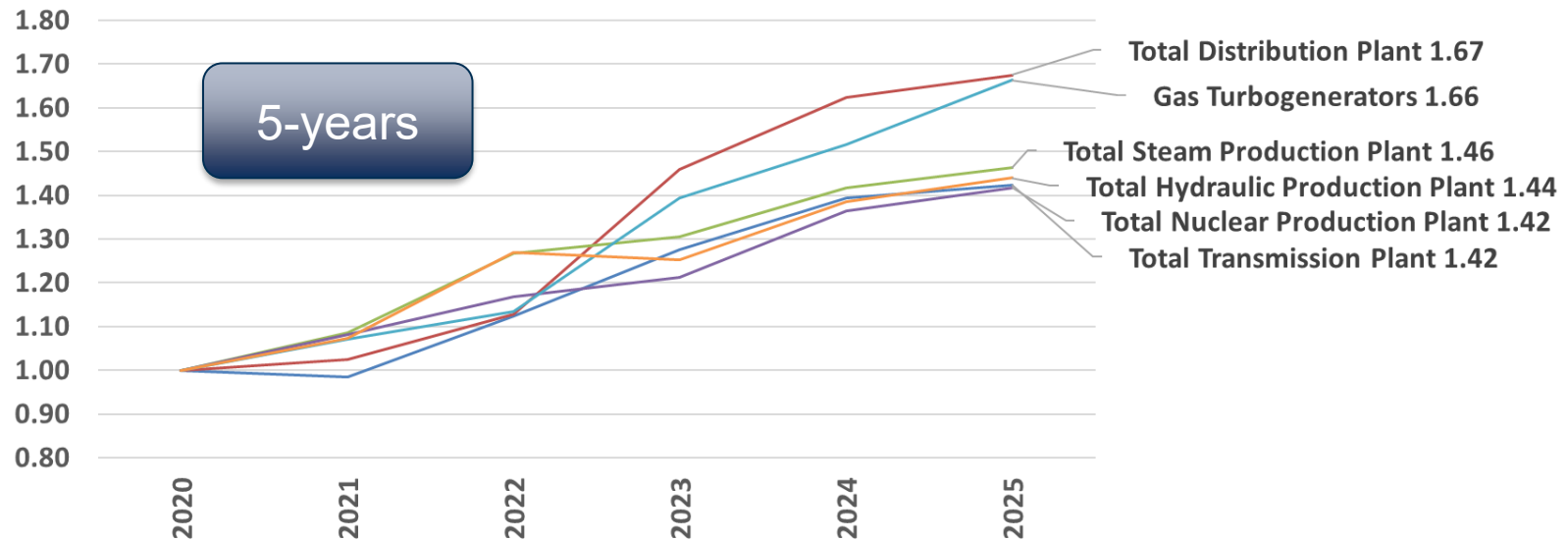
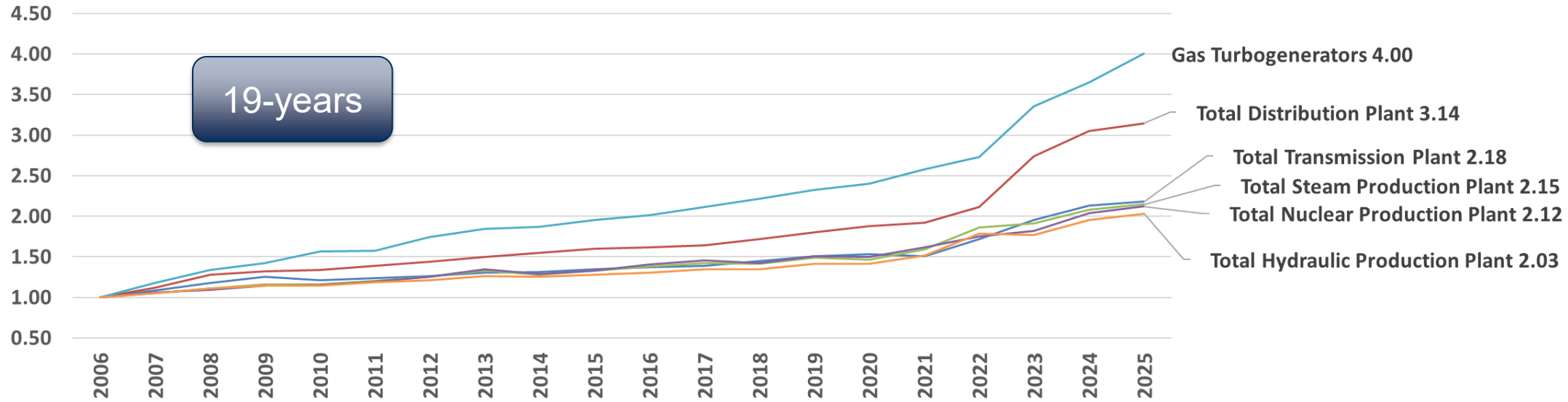


Vertically Integrated Degrees of Direct Access Restructured

Source: EEI External Affairs.



Cost Trends

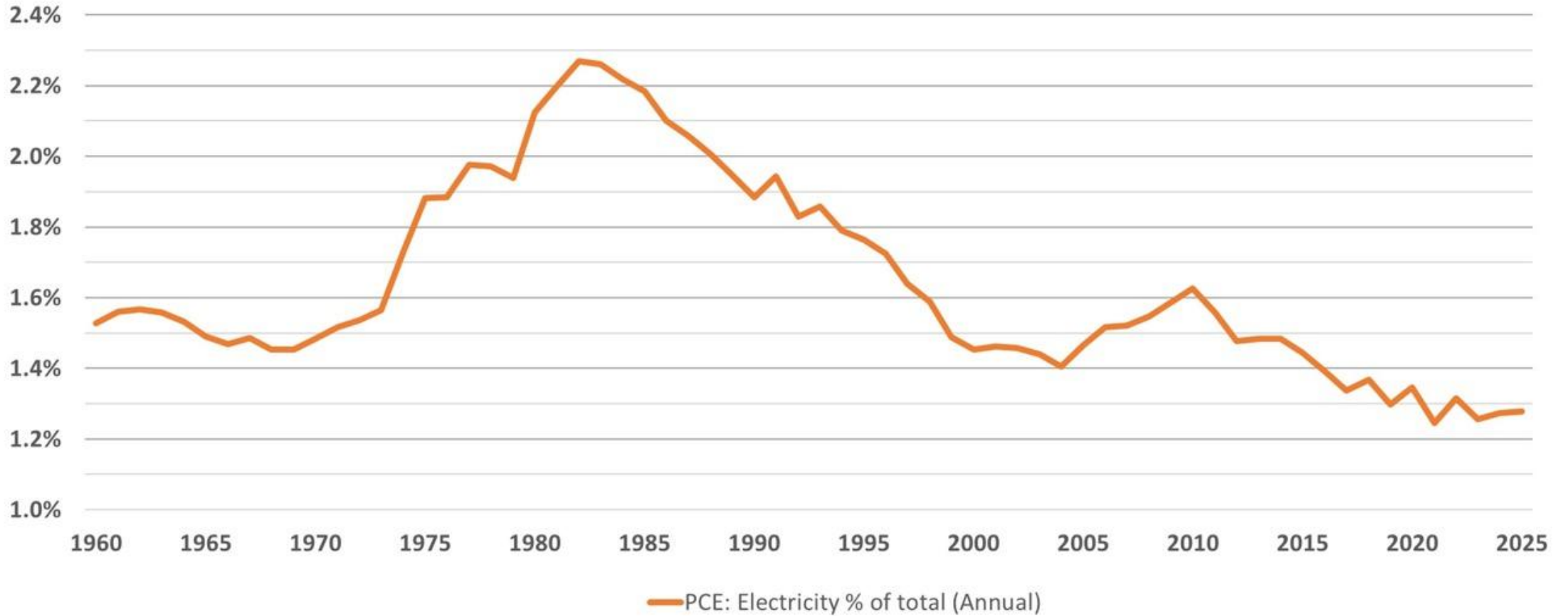


Source: Handy-Whitman Index of Public Utility Construction Costs, Whitman, Reardon and Associates, Baltimore, Maryland; EEI Business Analytics.



Low Average Relative Spending on Electricity

U.S. Personal Consumption Expenditures (PCE) on Electricity

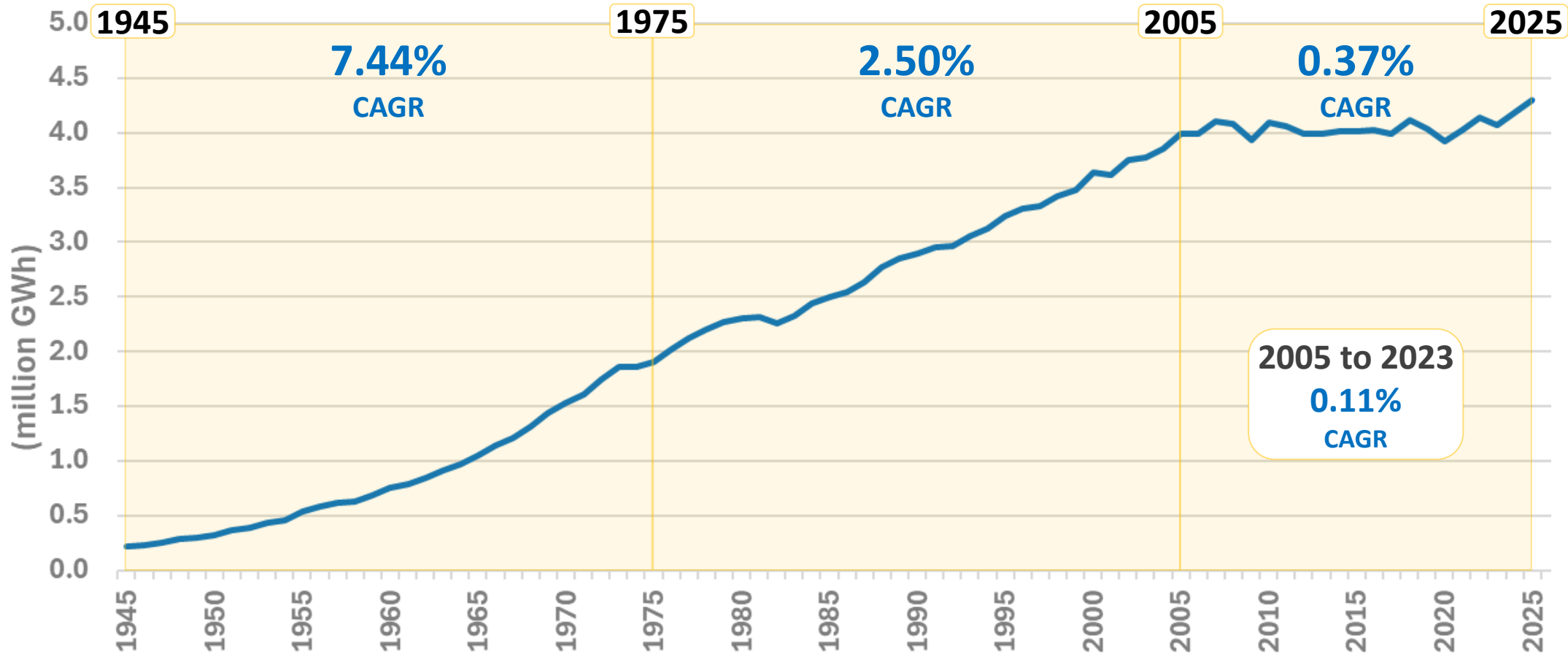


Source: U.S. Bureau of Economic Analysis, Table 2.4.5U; EEI Business Analytics.



Unprecedented Changes in Electric Demand

U.S. Electric Output (million GWh)



Notes: Total U.S. electric output for the contiguous United States.
Source: EEI Weekly Electric Output, EEI Business Analytics.

State of Reliability

Howard Gugel
SVP, Regulatory Oversight

April 30, 2026

About NERC: Mission

To assure the effective and efficient reduction of risks to the reliability and security of the North American bulk power system

- Develop and enforce reliability standards
- Assess current and future reliability
- Analyze system events and recommend improved practices
- Encourage active participation by all stakeholders
- Accountable as ERO to regulators in the United States (FERC) and Canada (NEB and provincial governments)



How did we get here?

1960s: 1965 Blackout, formed North American Electric Reliability Council (NERC) in 1968; 1 event in 10 years

1970s: Large central stations

1980s: Gas Reform and Combined-Cycle Gas Turbines

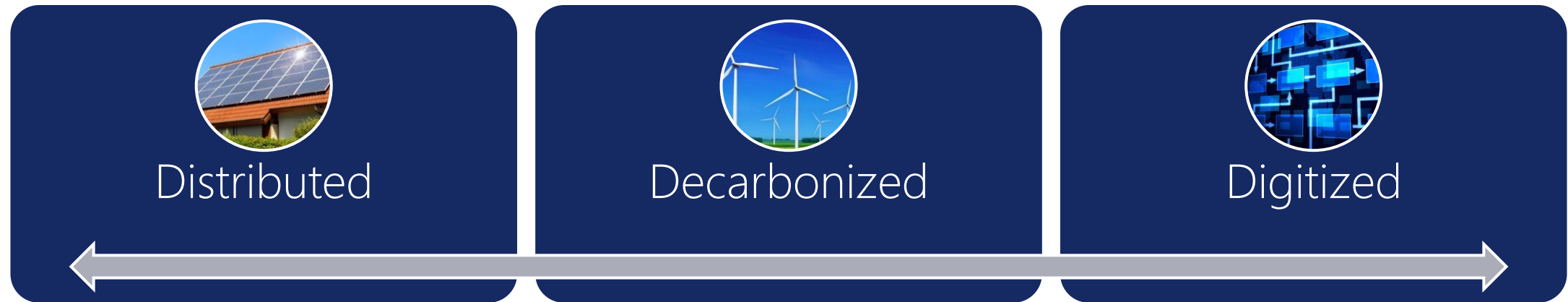
1990s: Restructuring and Markets

2000s: Hurricanes=> Price Volatility, Great Recession; 2003 blackout; 2005 EPACT, 2007 Electric Reliability Organization formed NERC

2010s: Buildout of variable energy resources; Questions about 1 day in 10 years

And now today...

A Changing Context for the BPS



Must Wins:

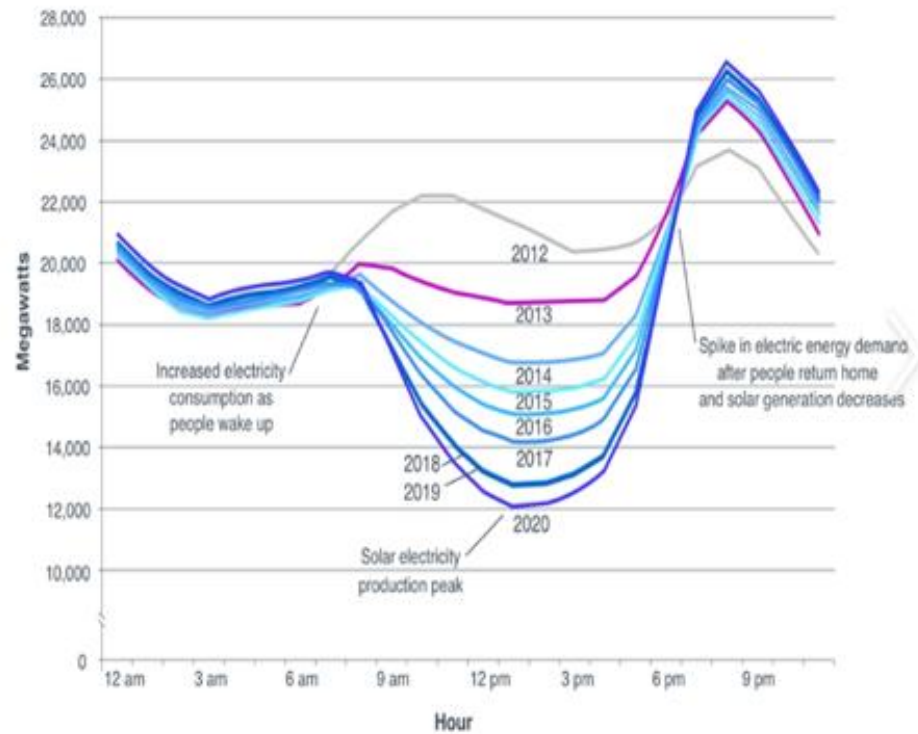
1. **Manage the pace of transformation** through market mechanisms and inter-agency coordination on policies that impact generation
2. Develop sufficient **transmission**, to integrate renewables and distribute them, make the system more resilient
3. Maintain a robust fleet of **balancing resources**, with an ability to provide **Essential Reliability Services**
4. Ensure a robust **energy supply chain** for the balancing resources, with sufficient access to fuel and stored energy to withstand long-duration, wide-spread extreme weather events
5. **STATES:** Refine resource adequacy requirements that preserves energy assurance

Hyper Complex Risk Environment

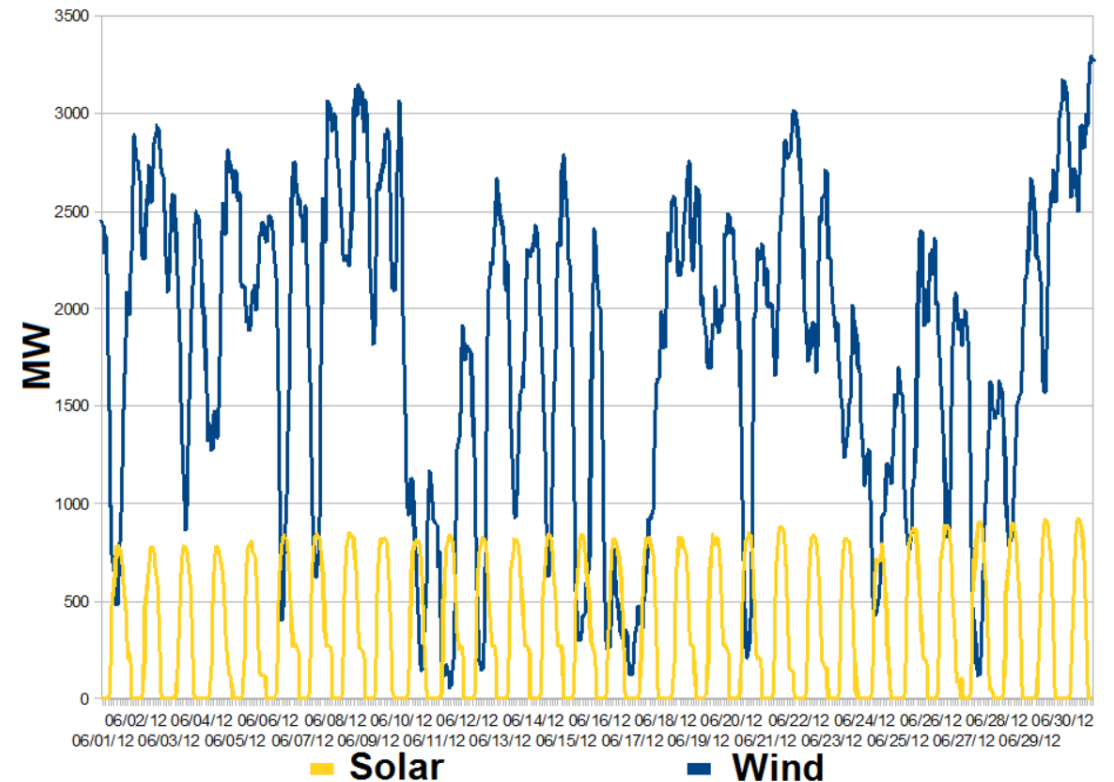


Challenges with Renewable Integration: Ramping and Volatility

California ISO "Duck Curve"

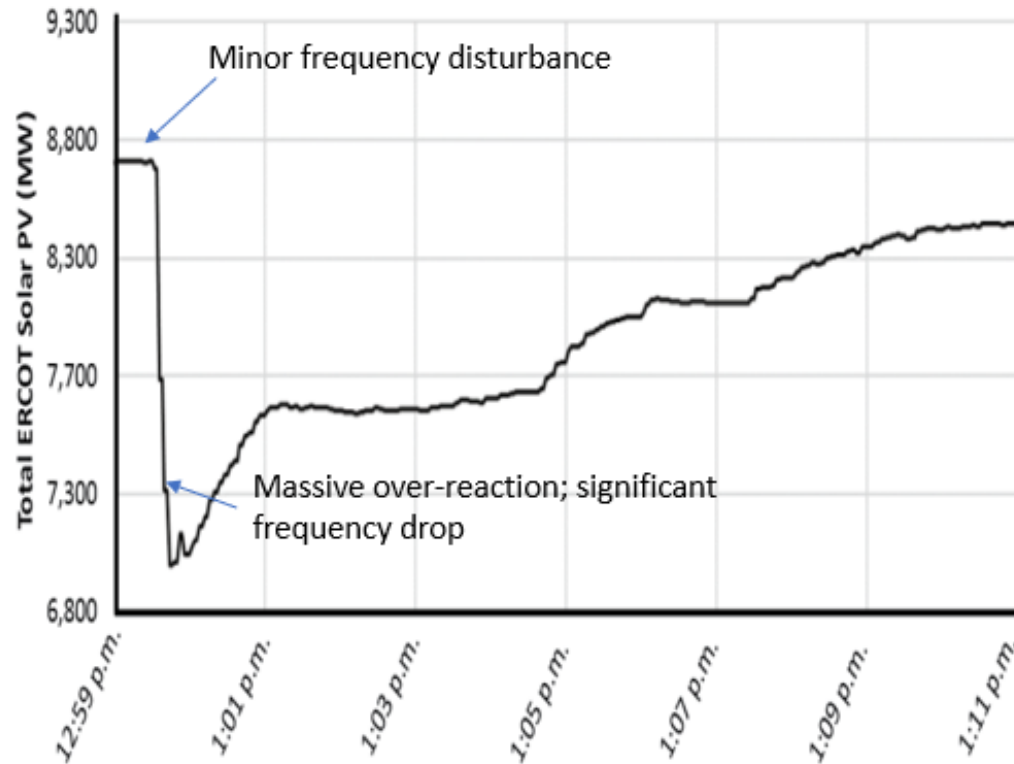


Solar and Wind Production in California

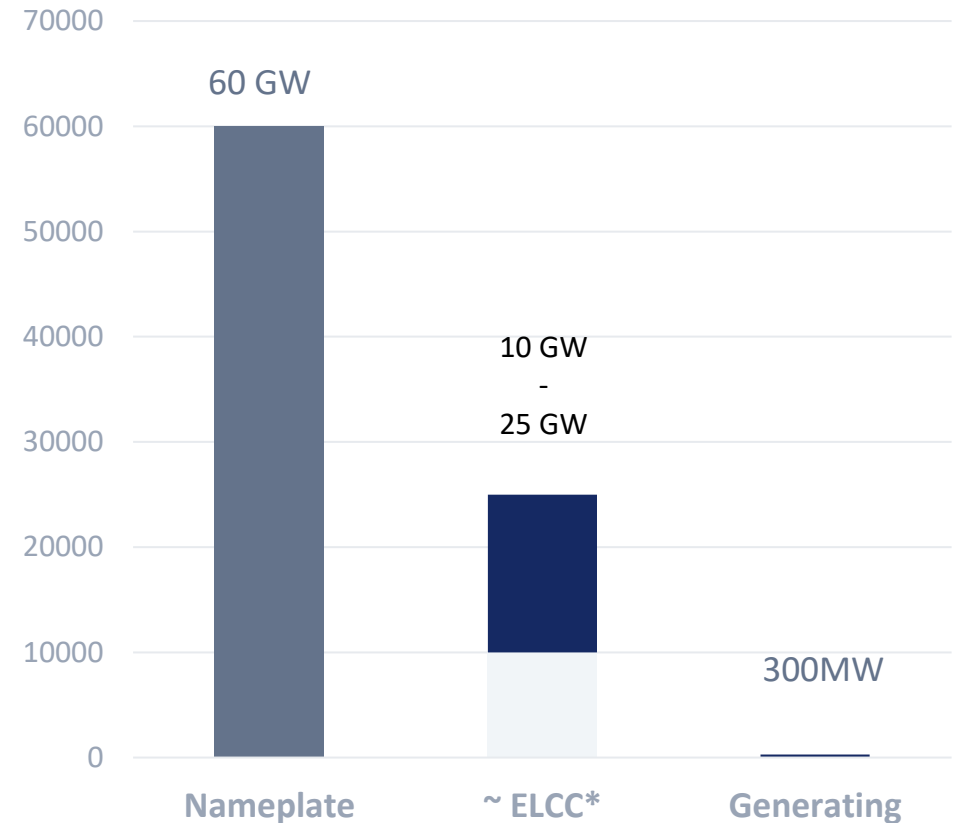


Challenges with Renewable Integration: Inverter Behavior and Common Mode Failure

ERCOT Solar Production June 4, 2022



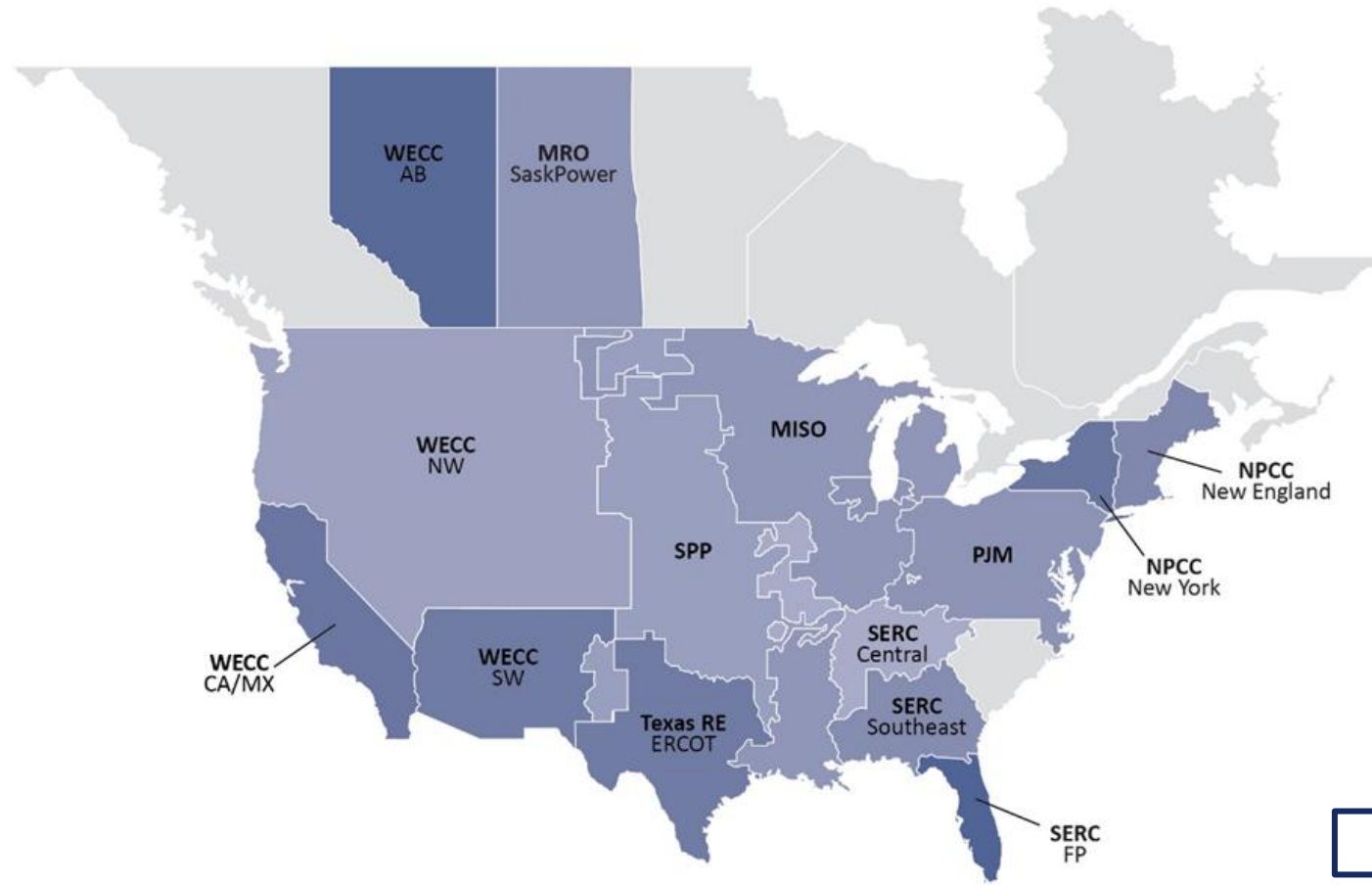
June 6, 2023 Wind Production North American Mid Continent



*ELCC is essentially the planning value of installed capacity ("Equivalent Load carrying Capacity")

Increasing Dependence on Natural Gas

Natural-Gas-Fired Generation Capacity Contributions to 2023–2024 Winter Generation Mix

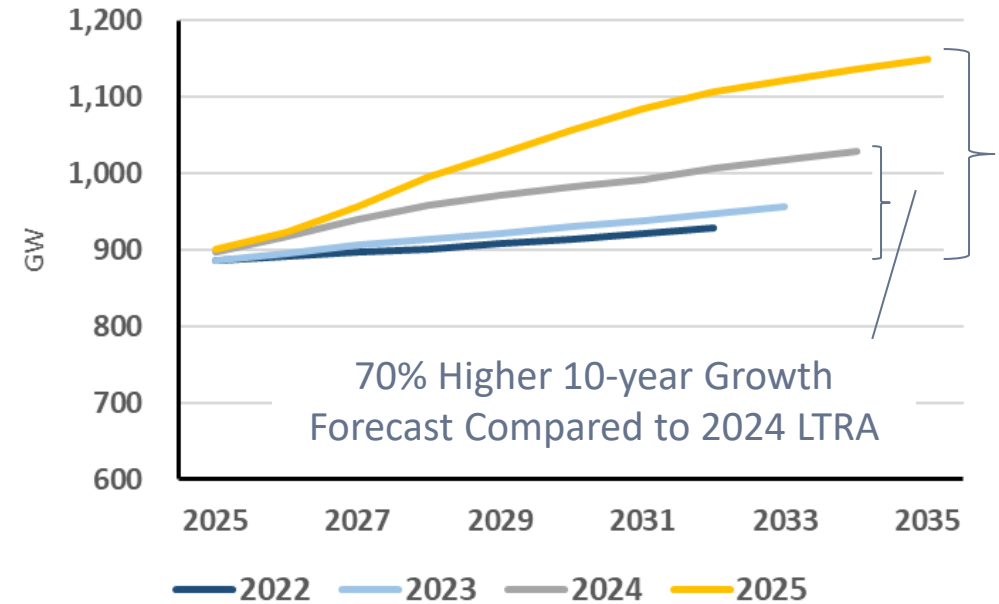


All other assessment areas have less than 35% natural gas fired generation contribution to winter resource mix.

	Natural-Gas-Fired Generation	
	Peak Winter Capacity	Contribution to Total Winter Resource Mix
MISO	67.5 GW	46%
MRO-SaskPower	2.1 GW	46%
NPCC-New England	17.3 GW	54%
NPCC-New York	24.5 GW	66%
PJM	84.9 GW	47%
SERC-Central	22.7 GW	44%
SERC-Florida Peninsula	50.6 GW	79%
SERC-Southeast	31.5 GW	51%
SPP	27.4 GW	41%
Texas RE-ERCOT	54.2 GW	62%
WECC-AB	11.4 GW	75%
WECC-CA/MX	39.9 GW	65%
WECC-NW	31.0 GW	39%
WECC-SW	18.2 GW	62%

Demand Forecasts Continue Rapid Ascent

- Assessment area summer peak demand is forecast to rise by over 223 GW (24% increase from 2025 peak demand)
- New data centers are the main source of load growth followed by other large industrial loads and electrification
- Winter peak demand growth continues to exceed summer growth
- Data centers and large industrial loads drive the demand forecasts and increase forecast volatility



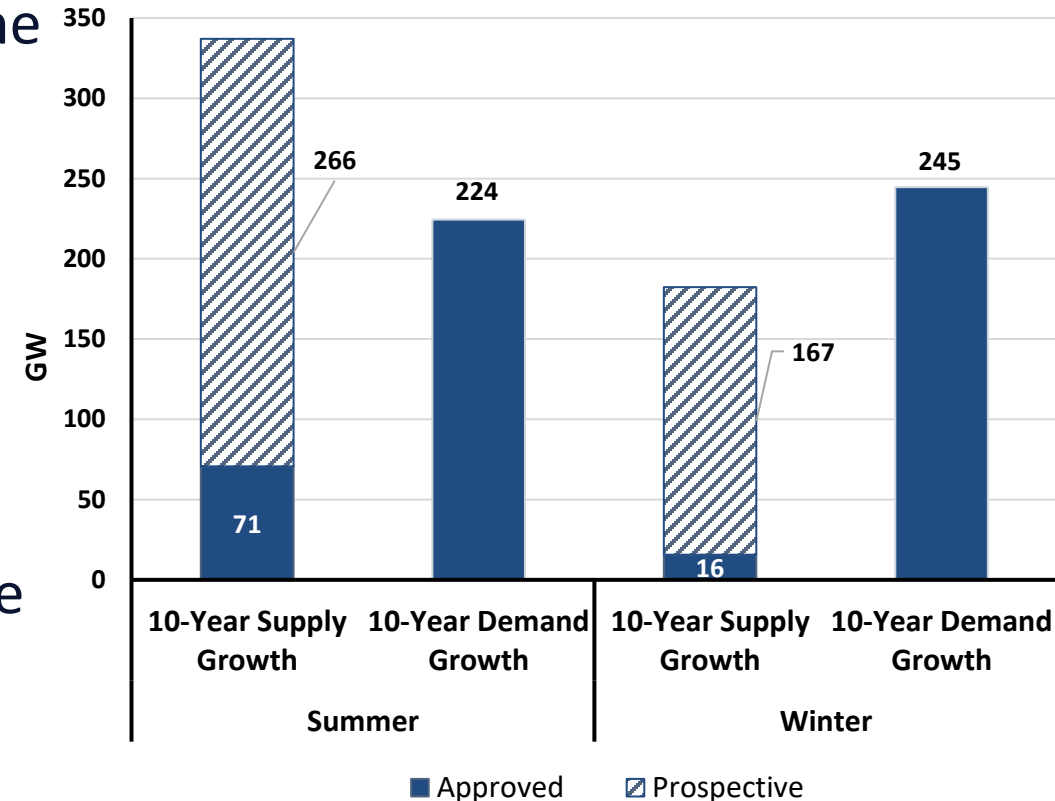
10-year BPS Summer Peak Demand Growth

With 10-year Growth From Previous LTRAs

Load forecasts submitted to NERC for the LTRA are from the first half of 2025. Some newer forecasts are beginning to emerge. In ERCOT, project delays or cancellations cause lower growth projections in the next few years but continued increases in years 4+). PJM's upcoming load forecast has not been released.

Shortfall Between Projected Resources and Demand

- High levels of sustained resource growth over the 10-year period is needed to meet demand forecasts
- BPS resource capacity fell short of 2024 LTRA projections due to unanticipated generator retirements and delays in connecting new resources
- Expedited resource programs are stimulating the flow of additional resources
- Some new resources from recently approved programs are not included in the 2025 LTRA risk assessment
- More winter capacity is needed to meet future demand



Projected Growth in Demand and Resources (10-years)

Approved Resources with Interconnection Agreements or in an approved Integrated Resource Plan (Tier 1)
Prospective Resources In earlier planning (Tier 2)

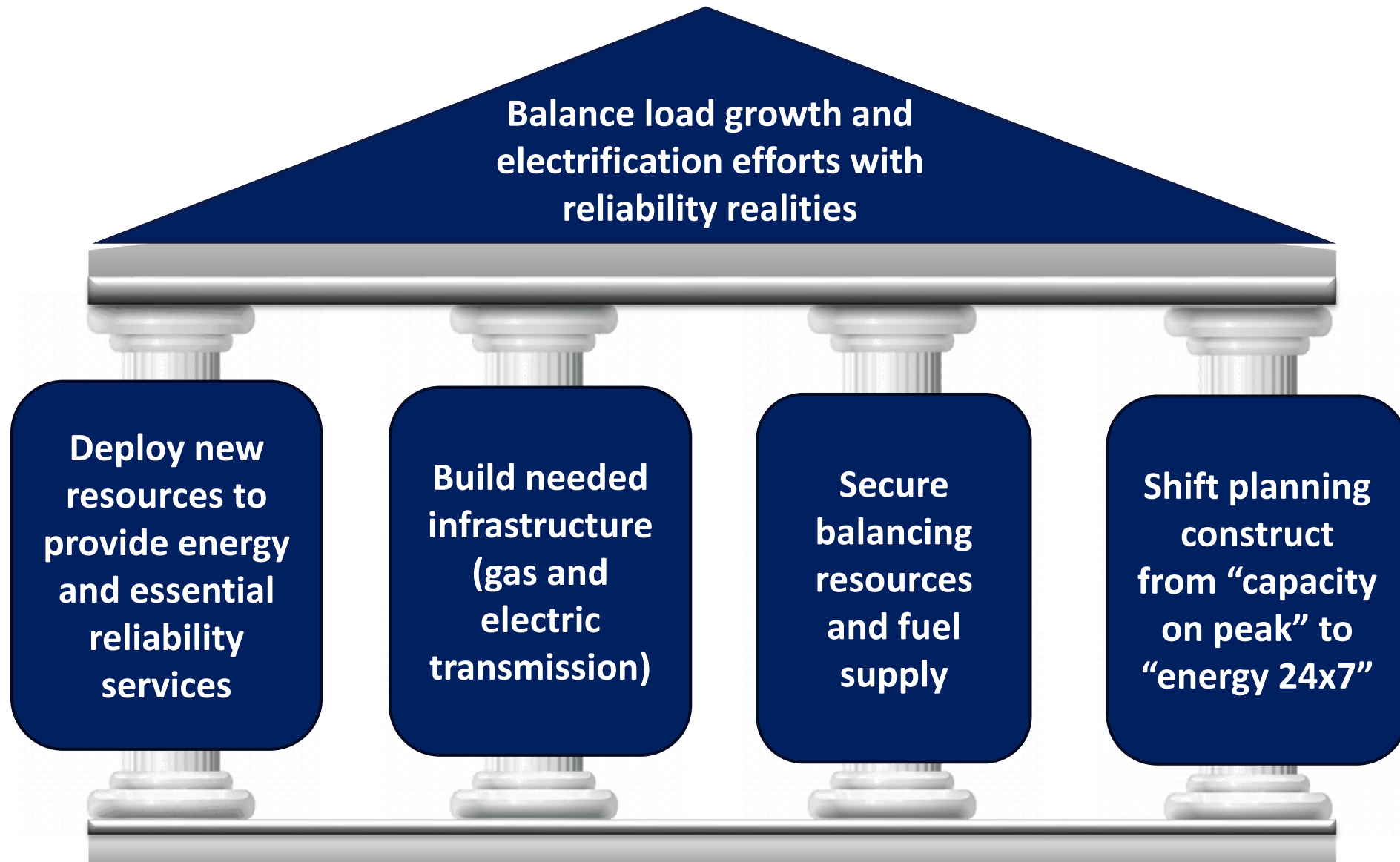
Need to Fix the Gas-Electric Interface

Observations

- Summer events are challenging; winter events are especially complex
- Gas-electric model and conventions do not support reliability during extreme conditions
 - Wellhead freeze offs
 - Equipment failures
 - Demand spikes
- Restructured electricity markets aren't to blame (but don't help either)
- Hour-to-hour demand for gas (fuel) is highly uncertain



Reliability Priorities to Support the Energy Transition



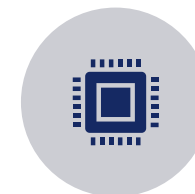
Top Priorities



Energy Analysis



Inverter-based Resource Integration



Large Load (Data Centers, Cryptocurrency, and AI) Integration



Weather hardening of Generation and Transmission



System Operations with DER (especially impacts on UFLS and UVLS)



Volatility of Energy Policy



Gas-Electric Interdependency



ASCE Report Card for America's Infrastructure

Jim Lehan

Manager, Transmission / Civil Engineering – Reno Nevada

History of our electric infrastructure



- NVE North - Established in 1888 as the Virginia City Light and Power Company
- First transmission lines were 55kV and 60kV as far back as 1906.
120kV - 1949, 230kV – 1970, 345kV – 1980, 525kV - 2013

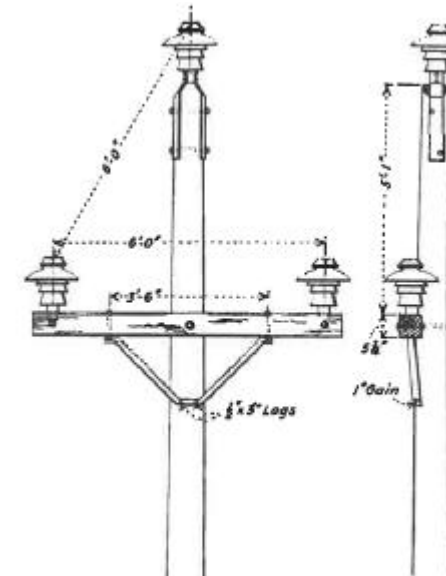
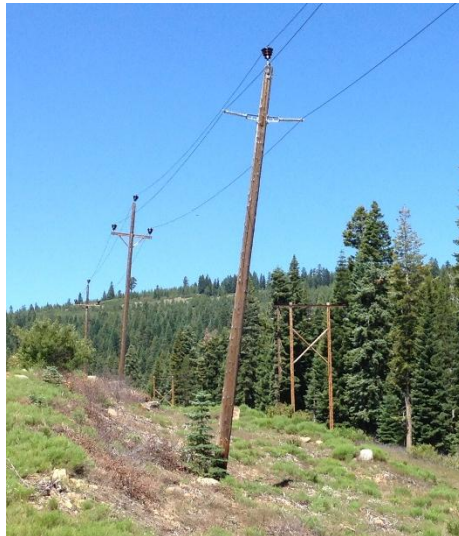


FIG 57—POLE TOP OF 55,000-VOLT LINES

History of our electric infrastructure



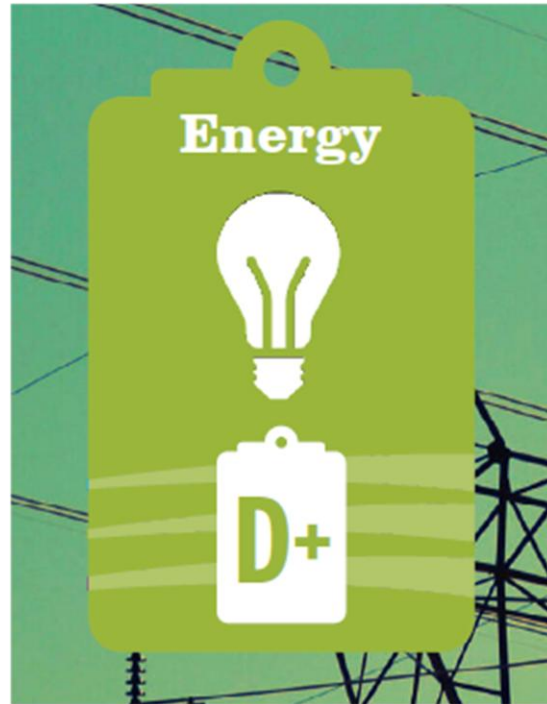
- Prior to the 1980's, all lines of 230kV and below were made with wood poles.
- Over 50,000 wood transmission poles
- Over 200,000 wood distribution poles
- The majority of our 470 substations are over 50 years old
- Many transmission facilities were constructed with small conductor and low rated substation equipment



Making the grade



- So what is the status of our system today?



Making the grade



- Prior to 2010 – the answer is yes
- In the 40 years from 1980 to 2020 Nevada was one of the top 5 fastest growing states in the US.
- Las Vegas was the fastest growing city in the US for 20 years.
- Huge requirement for capital investment for new infrastructure to serve new load

Examples:

- 1990 – 160 miles of 345kV line to intertie with N. California
 - 2004 – 180 miles of new 345kV line to tie with Utah
 - 2006 – Constructed a new 500MW combined cycle power plant
 - 2013 – 230 miles of 525kV line to intertie North and South
- Put a strain on maintenance budgets for a long time.



The shift to system improvements



- 2010 started LiDAR review of the entire transmission system and we corrected hundreds of minor and some major line clearance issues on the old system.
- Increased efforts on Raptor protection
- Rebuilds and reconductors of old lines – recognizing they are beyond maintenance
- Increase of system capacities with High temp low sag composite core conductors
- Dynamic Line Rating technology
- Improvements to substation standards with breaker-and-a-half configuration
- Upgrades to telecom facilities and installation of OPGW on all new lines



Our biggest risk - WILDFIRE



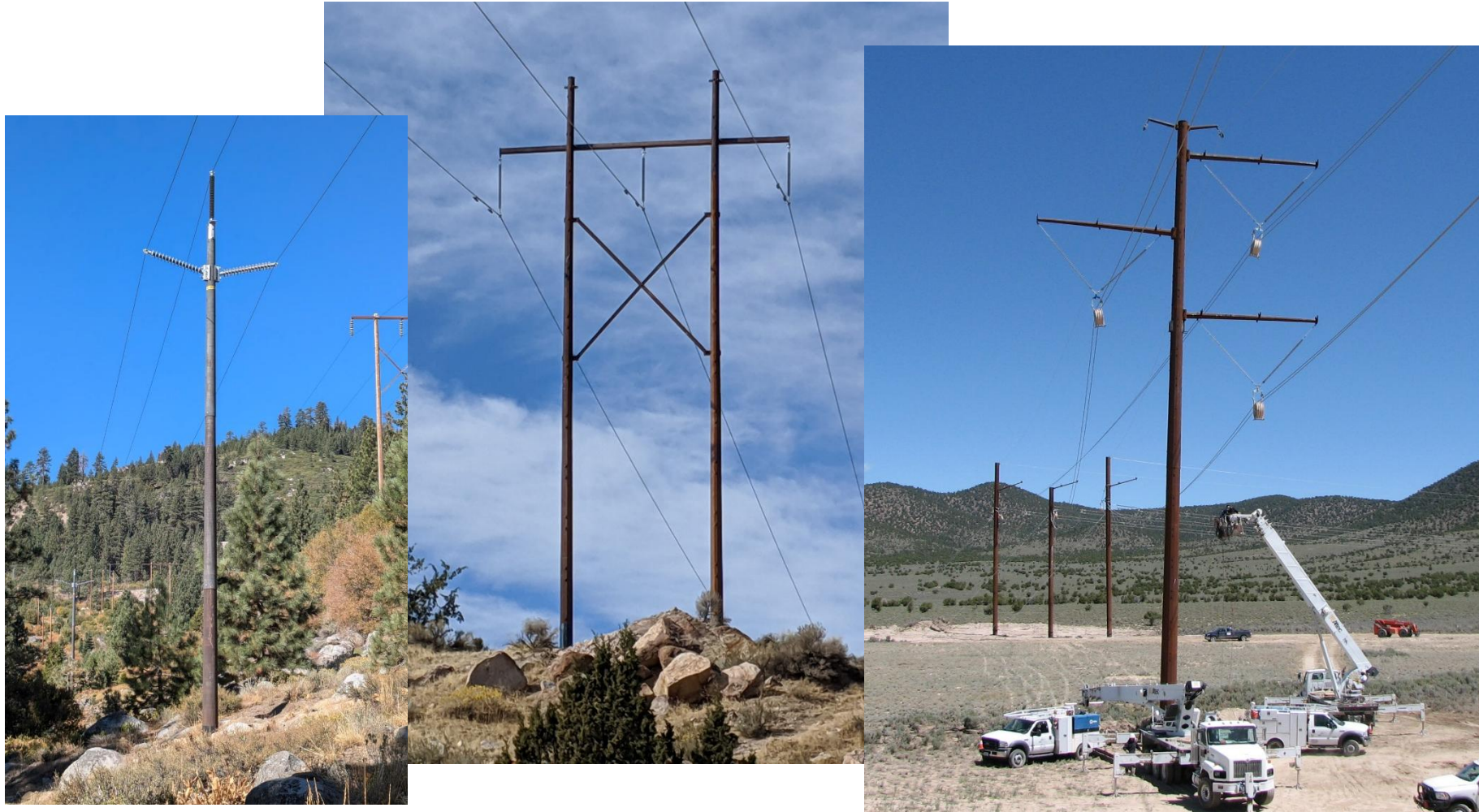
- 2019 started an extensive NDPP program inspecting every pole in high fire risk areas.
 - Grid hardening against wildfires
 - In the last 5 years we have made over 8,000 repairs of minor items (insulators, crossarms, etc)
 - By the end of 2025 we replaced 2154 wood poles
 - Removing old damaged conductors and installing covered tree wire on distribution lines in high fire risk areas.
 - Installing fire walls around critical substations and fire wrap on wood poles
 - Using ductile iron poles on distribution and 60kV transmission lines
 - Standardized on steel poles on 120kV and higher lines



The grade today?



- Solid C+, and headed in the right direction



Future challenges



- 2015 began large investment in the Tahoe Reno Industrial Center about 15 miles east of Reno.
- The park covers 167 square miles and is the largest industrial center in the US.
- Began with numerous large warehouses and distribution centers.
- Tesla gigafactory was the first big customer over 100MW
- Growth still manageable



The data center boom



- The first data centers began 2015. Initial service was taken at 120kV. Size was modest.
- In the last 5 years, the growth of AI has driven demand of over a dozen individual data center campuses including Apple, Google, Microsoft, Switch, Edgecore, Novva, Tract, and others are all under construction.
- New data centers will be taking direct service at 345kV
- We currently have signed contracts for over 6,000 MW of new load and roughly 12,000 MW of projects in development. (North only)
- We are tasked with increasing the total system peak by 3x to 10x in the next ten years - 100 years of growth in Northern Nevada to get to a system peak of 2000 MW



Growth of renewables



- In 2024, NV Energy hit 46.8% renewable energy and was on track to have 50% renewables by 2030
- NVE has 52 renewable long-term Power Purchase Agreements comprised of a mix of solar, geothermal, hydro, methane, and wind resources
- Immense load growth strains the percentages!
- Over 80,000MW in renewable applications.



More mega-projects



- Currently working on the Greenlink project. Estimated cost = \$4.2 Billion
 - West – 350 miles of 525kV line from Las Vegas to Walker River
 - North – 235 miles of 525kV line from Walker River to Robinson Summit
 - Three 345kV lines from Walker River into Reno and the Tahoe Reno Industrial Center
 - Walker River Substation will be one of the largest in the country at over 150 acres
 - Includes 525kV, 345kV, 230kV, and 120kV yards



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Questions?





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