

## Monthly Board Report – 8/13/25



### Agribusiness and Water Council/NWRA

- House Sets Vote On Republican Clean Water Act Bill
- USDA to Shed Buildings, Move 2,000 Workers Away from DC
- Forest Service Regional Offices to Close Under USDA Reorganization Plans
- Moving to 5 Regional Hubs; Raleigh, KC, Indy, Fort Collins & Salt Lake
- No NEPA, ESA Reviews Needed for SOCAL Water Contracts, Court Rules
- Administration Unveiled National Farm Security Action Plan
- NWRA Submits NEPA Comment Letters to DOI and USACE
- Senate Confirms Brian Nesvik as FWS Director
- Telle Confirmed as Assistant Secretary of the Army for Civil Works
- Colorado River Basin Groundwater Depleted 27.8 MAF from 2002-2024
- Senate Passes Agriculture Appropriations Act
- July Cattle Inventory Report - inventory was 94.2 M head, Down 1% YOY

### American Public Power Association

- APPA Files Comments on Proposal by Corps to Reissue Nationwide Permits
- APPA Submits Comments to FERC in Resource Adequacy Proceeding
- APPA Submits Comments on EPA's Proposed GHG Rule
- Policy Makers Council Meet Congressional Offices on Key Legislatives Issues
- APPA Sends Letter in Support of H.R. 4669, the FEMA Act of 2025
- APPA Asks Treasury to Issue Guidance on Nuclear Tax Credit Issues
- APPA Files Comments in CWA Section 401 Water Quality Open Docket
- APPA Files Comments on Proposal to Repeal MATS Rule Amendments
- FAA Releases Notice of Proposed Rulemaking for BVLOS Drone Operations

### Arizona

- Governor Signs Ag-to-Uban Legislation

- SRP Sets New Multi-Day Records for Energy Demand
- SRP, Others Work to Lock In Critical Natural Gas Delivery to Power Growth
- Siemens, TRC Help Salt River Project Get Ready for AMI 2.0
- SRP Diverts 500 Tons of Utility Poles from Landfills
- SRP, Arizona Department of Forestry and Fire Management Sign Five-Year Commitment for Continued Forest Restoration
- Phoenix receives \$179M in federal funds for water purification facility
- Kelly, Gallego Advance Rural Development and Public Safety Projects
- Governor Authorize Transfer of 5,926 AC-Ft/Year to Buckeye & 5,000 AC-Ft/Year to Queen Creek for the Next 110 from Harquahala Basin
- Basin Holds 8 MAF, Transfers would Be Equivalent to Business as Usual
- Oak Flat – One of World’s Largest Undeveloped Copper Deposits (1,970 Billion Metric Tonnes, Faces Opposition due to Potential Ecosystem Destruction
- “Fire Clouds’ Over AZ And UT Wildfires Creating Their Own Erratic Climate

### **Bureau of Reclamation/Dept. of Interior**

- Natural Flow Deliveries of 55%-75% Being Considered in Negotiations
- DOI New Solar, Wind Policy Sparks Concerns Of ‘Shadow Ban’
- Burgum Urges House GOP To Target Biden-Era Energy Policies
- WAPA Annual Composite Rate Calculation of 28.27 mills/kWh for PDP
- BOR Awards \$93M for Arroyo Canal Fish Screen and Sack Dam Fish Bypass
- DOI Announces 4 Policy Measures to End Wind “Preferential Treatment”
- BOEM Rescinds Designated Wind Energy Areas - Outer Continental Shelf
- DOI Reversed the Biden-era Approval Wind Project in Southern Idaho
- White House Tells BLM to Cut Spending on Renewables, Land Purchases
- DOI Fast-Tracks Utah Coal Leasing Using GOP Megabill

### **California**

- New State Law In CA Exempts Advanced Materials Manufacturers from Environmental Review in Industrial Zones
- CCA Pioneer Community Energy to Expand to 13 New NoCal Communities
- Turlock Irrigation District Selects OATI for DERMS Platform

- New Workforce Development Playbook Released for CA Public Utilities
- IID Awards \$1.1+ Million in Energy Grants to 20 Local Educ. Institutions
- LA Mayor Announces Completion of LADWP Solar Plus Storage Project
- CA Supreme Court Sides With Environmental Groups In Rooftop Solar Case

## **CREDA/Upper Basin**

- If Hydrology is poor, GCD Could Stop Generating Energy by Dec. 2026
- CREDA Sends DOI/DOE Letter Regarding 2025 Smallmouth Bass Flows
- Bypass Flows Expected Early August – Oct. 22. Expected to Cost \$6-\$7M
- Colorado Lawmakers Seek Release \$140M of Colorado River IRA Funds
- Flaming Gorge Dam Visitor Center Reopens

## **Department of Energy**

- DOE Terminates Conditional Commitment for Grain Belt Express Project
- DOE Pilot Program for Development Of Advanced Nuclear Reactors
- DOE Labs Host Summit On AI's Impact In Nuclear Energy Industry
- Idaho National Laboratory Collaborates with Microsoft to Streamline Nuclear Licensing Utilizing AI
- DOE Announces Site Selection for AI Data Center and Energy Infrastructure Development on Federal Lands
- DOE Issues Emergency Order Allowing for Operation of MD Generating Unit
- DOE Selects Idaho National Laboratory, Oak Ridge Reservation, Paducah Gaseous Diffusion Plant and Savannah River Site for Data Center Sites
- DOE Secretary Wright said you “will see next-generation nuclear reactors tested” on federal lands sometime next year
- Oak Ridge Lab, Atomic Canyon to Accelerate Nuclear Licensing with AI
- DOE Announces First Pilot Project for Advanced Nuclear Fuel Lines
- Despite \$1B Appropriated to Loan Program Office, LPO is Losing Staff
- DOE Approves Fifth Loan Disbursement to Restart Michigan Nuclear Plant
- Denver Airport Explores Small Modular Reactor

## **Environmental Protection Agency**

- Trump Exempts More Than 100 Polluters From CAA Enviro. Standards
- EPA To Nix Office Of Research And Development, Firing Some Staffers
- EPA Issues Rule to Extend Certain Deadlines in CCR Legacy Rule
- EPA to Launch Formal Reconsideration of Endangerment Finding
- EPA Announces Second Phase of Restructuring
- EPA Air Chief Aaron Szabo Confirmed to Office of Air and Radiation
- EPA Cancels \$7 B in Funds Made Available Through Solar for All Program

## **Federal Energy Regulatory Commission/NERC/NRC**

- FERC To Kill Policy Office Under Trump-Ordered Reorg
- Trump Nominates David LaCerte to Fill Vacant FERC Commissioner Seat
- Trump Nominates Democratic Commissioner David Rosner as FERC Chair
- President Trump Nominates Ho Nieh to be a Member of NRC
- President Trump Axes Nuclear Waste Oversight Panel
- FERC Approves Grid Operators' Requests To Fast-track Projects
- NRC Dockets Construction Permit Application for TVA SMR
- NERC's Large Loads Task Force Releases First White Paper
- NERC Issues Updated Wildfire Mitigation Reference Guide
- NRC Approves Licensing Actions Required for Restart of MI Nuke Plant
- Senate Confirms David Wright for another NRC Term
- FERC Issues Categorical Exclusions to Ease NEPA Review for Hydro Projects
- FERC Approves Reliability Standards For Inverter-Based Resources

## **Financial Focus**

- Hadrian Plans \$200M AI-Powered Manufacturing and Software Hub-Mesa
- Lucid will partner w/ Uber and Nuro on Global Robotaxi Program
- TSMC announced it will accelerate its Arizona Construction Timeline
- US and EU Avert Trade War with 15% Tariff Deal
- EU to Include Nuclear Reactor Exports in its \$750B Energy Pledge

- Trump Hiked Tariffs on India to 50% Over Russian Oil Purchases
- Governor Hobbs Announces Arizona Tech Week (April 6-12, 2026)
- Project Blue – Tucson’s Controversial Data Center Project Dead/Comatose
- Billy Long will Soon be Ousted as Commissioner of the IRS
- Applied Materials Plans \$200 M Advanced Manufacturing in Chandler

## Industry Update

- Global Investment In Fusion Energy Rises The Most Since 2022
- AI Boom Leads To Record Costs On US Grid And Call For New Plants
- Less Than 400 EV Charging Ports Built Under \$7.5B Infrastructure Program
- Electric Utilities Will Invest \$1.1+T By 2030 To Meet Demand Growth
- With Gas Generation Surging, Turbine Backlogs Come to the Forefront
- Companies Unveil More Than \$90B in Data Centers, Energy and Power Infrastructure
- Google, Brookfield Sign U.S. Hydro Agreement for Up to 3,000 MW
- Westinghouse to Accelerate U.S. Nuclear Reactor Construction, Enhance Operations with Google Cloud AI
- Loveland Colorado Details Success of Drone Inspection Program
- CNBC Lists 10 States w Grids Best Positioned to Power AI Data Center Boom
- Oracle, OpenAI Enter Agreement to Develop 4.5 GW of Additional Stargate Data Center Capacity in U.S.
- WI Regulators Approve First of its Kind (CO2) Long-Duration Storage Project
- Google Enters Partnership with Long Duration Energy Storage Company
- NY Launches Bulk Energy Storage Request for Proposals
- GE Vernova, Crusoe Announce Deal to Deliver 29 Gas Turbines to Power AI Data Centers
- PA Lawmaker to Introduce Bill Tied to Data Center Energy Costs
- IL Public Power Community Deploys AI for Advanced Grid Management
- NYPA Publishes Draft of Updated Renewables Strategic Plan
- Oracle and Bloom Energy Collaborate to Deliver Power to Data Centers
- WA & CO Rush to Grab EV Charging Money that Trump Froze
- Gov Announces Texas Energy Fund Loan To 456 MW Natural Gas Facility
- Google, TVA Enter Agreement Tied to Data Center Demand Response

- EIA Sees Rapid Electric Demand Growth in Texas, Mid-Atlantic
- Western Governor's Chair Cox Picks Energy as his Initiative
- Caterpillar, Others Unveils Agreement Tied to Data Center Campus in Utah
- University of Missouri Researchers Tap AI to Help Manage Energy Use
- GM Shifts EV Battery Focus To Energy Storage For AI Firms
- AI Is Helping Hackers Automate And Customize Cyberattacks
- Trump Reverses Biden Approval Of Major Wind Farm In Idaho

## Markets

- FERC Rejects MISO Petition To Limit Market Monitor's Transmission Planning Oversight
- FERC Approves MISO, SPP Fast-Track Interconnection Reviews
- FERC Approves MISO's Expedited Resource Addition Study
- Governors Rebuke Managers Of Largest U.S. Electric Grid – PJM
- Governors to Hold Technical Conference Focused on PJM in September
- PJM Capacity Prices Set Another Record With 22% Jump
- SPP Publishes Report on April Load Shed Event
- PJM Auction Procures 134,311 MW of Generation Resources
- ISO-NE Explores AI to Help Predict Transmission Outages During Storms
- FERC Approves SPP Proposals of Advance Regional Resource Adequacy
- Western Energy Markets Governing Body Approves Important Market Reliability Feature
- TVA and Type One Energy Sign First Contracts for Fusion Power Project
- BPA and Customers Settle on Strategic Rate Increases to Meet Customer Load Growth and Connect New Generation
- Cheyenne Data Center Using More Electricity than all WY Homes Combined
- SPP Senior VP of Operations Bruce Rew will retire in December of 2025
- TVA Prices \$1.25 Billion of New Five-Year Global Power Bonds
- SPP Approves New Approach That Replaces Legacy Grid Study Methods
- 5 Utility Commissions Ask FERC To Undo MISO's \$22B Multi-Value Transmission Portfolio
- MISO Could Save \$27B In System Costs By 2035 With 11 GW Of Batteries

## Meetings

- July 17<sup>th</sup> – PDP Funding Board Meeting
- July 22<sup>nd</sup> – Meeting w/ SRP
- July 23<sup>rd</sup> – Call w/ WAPA @ PRBs
- July 24<sup>th</sup> – BOR Overhead & PRB Discussion
- July 24<sup>th</sup> – APPA GRWG Call
- July 27<sup>th</sup>- July 30<sup>th</sup> – APPA Advisory Committee Meeting
- August 1<sup>st</sup> – Meeting w/ RID
- August 4<sup>th</sup> – Meeting w/ TOUA
- August 7<sup>th</sup>-8<sup>th</sup> AZ Water Law Conference
- August 13<sup>th</sup> – Westmark Breakfast – Water
- August 13<sup>th</sup> – MCFB Annual Meeting

## Oil & Natural Gas

- Power Burns Driving MX Gas Demand as LNG, Industrial Outlooks Softens
- Global Natural Gas Prices Slip as Supply Surges
- Manufacturers Warning of LNG-Fueled Natural Gas Price Shock
- Australia's Domestic Natural Gas Troubles Could Tighten Global Markets
- Baker Hughes Sees Bright Outlook as LNG, Data Center Boom Fuels Growth
- Natural Gas Price Volatility Fell Over the First Half of 2025: EIA
- Global Natural Gas Prices Finally 'Steadying' After Wild Ride in 2022
- Permian Natural Gas Forward Prices Fall Below \$1 for September
- LNG Demand Expected to Drive U.S. Production Growth into 2026
- Natural Gas Pipeline Timelines Accelerate as Kinder Morgan Files 'Biggest Projects in 25 Years – Augusta, GA to Mississippi
- NGI Projecting Modest Natural Gas Storage Build Amid Extreme Heat, Massive Drop in Wind Generation
- Pemex Natural Gas Output Struggles Seen Driving Record U.S. Exports to Mexico Through 2026
- Pemex Courting Private Sector to Advance Unconventional Projects
- Sempra's MX LNG Project Nears Finish as Pacific Coast Outlook Stays Bullish

- Energy Transfers \$5.3B Desert Southwest Project Aimed at Bringing Permian Basin supplies to Arizona and New Mexico.
- The 516-mile, 42-inch pipeline could bring 1.5 Bcf/d to the region by the end of 2029, according to the firm
- Natural Gas Replacing Coal on Chile Power Grid in Decarbonization Push
- FERC Staff Issues Final SEIS For Texas LNG
- U.S.-Canada Energy Trade Worth \$150B-Plus in 2024, but Slowing This Year
- Natural Gas Replacing Coal on Chile Power Grid in Decarbonization Push
- 59 Bcf Storage Build, has Potential for Record High Winter Inventories

### **Transmission/WAPA**

- NY PSC Halts Transmission Process Tied to Offshore Wind
- Colorado Springs Utilities, Platte River Power Authority, Other Utilities Partner to Explore Transmission Solutions
- Route for Major Illinois Transmission Line Project is Approved
- WAPA-209 Rate will Remain the Same in 2026 as in 2025

### **Washington DC**

- House T&I Committee Leaders Release FEMA Reform Bill
- House Panel Backs Total Suppression for Wildfires
- White House Releases Artificial Intelligence Action Plan
- Congress Approves Rescission Package Cutting \$9B in FY 2025
- President Trump Wants To Use AI To Prevent Wildfires, Utilities Are Trying
- After Reconciliation, Lawmakers Return To Permitting
- Senate Releases Text of FY 2026 NDAA With Energy Provisions
- House Natural Resources Passes Wildfire and Forest Management Bills
- Senate Energy Committee Holds Electricity Demand Hearing
- HNR Subcommittee Holds Legislative Hearing on ESA Transparency Act
- 2028 Democratic Hopefuls Lining Up in SC, including GAVIN NEWSOM (CA), WES MOORE (MD), TIM WALZ (MN), ANDY BESHEAR (KY), Sen. MARK KELLY (AZ) & Rep. RO KHANNA (CA)
- Khamala Harris Decided not to Run for Governor, is 2028 in Her Sights?

- Rueben Gallego's Name Continues to Pop Up Regarding Presidential Run
- AOC Also Being Mentioned as Possible Candidate
- Westerman Introduces Bipartisan Permitting Reform Legislation-SPEED Act
- Trump Signs Data Center Permitting Executive Order
- Bipartisan NEPA Reform Bill Introduced in House
- Senate Passes Hydropower Licensing Legislation – S.1020
- Trump Mounts New Attack Against Wind Projects On Federal Land
- Workers at Federal Office Responsible for LIHEAP Fired this Week
- Senate Democrats Reviving Push to Terminate Trump's Energy Emergency