



# NORTH CAROLINA'S BUSINESS-DRIVEN ENERGY VISION

## BUSINESS PRIORITIES & INSIGHTS

North Carolina's business community is clear that energy is central to the state's long-term competitiveness. Employers across industries consistently cite reliable, affordable, and predictable power as essential for operations, expansion, and site selection. At the same time, companies increasingly view sustainability and regulatory consistency as key factors that influence investment decisions.

Through the statewide engagement process, these priorities emerged as common themes across diverse sectors, from advanced manufacturing and agriculture to healthcare and technology. They reflect the operational realities of employers who depend on uninterrupted service, clear cost signals, and confidence that energy infrastructure will grow alongside the economy.

These insights form the foundation for the state's first business-driven energy vision. Organized into seven strategic pillars, the vision offers a pragmatic and forward-looking framework to keep North Carolina's energy system strong, reliable, and aligned with business needs well into the future.

## KEY INFRASTRUCTURE CHALLENGES

- **Surging Demand.** Population growth, new data centers, industrial electrification, and automation are pushing demand far faster than expected. Without timely generation and transmission expansions, bottlenecks could slow growth and raise costs.
- **Aging Grid Assets.** Much of the state's transmission and distribution network is decades old, risking more frequent and longer outages, particularly in rural areas. Upgrading and digitizing the grid is urgent.
- **Permitting and Regulatory Delays.** Lengthy and fragmented approval processes hinder new plants, transmission lines, and renewable projects. Streamlined and predictable permitting is critical to keep projects on schedule.
- **Rural-Urban Disparities.** While cities benefit from recent upgrades, many small towns rely on outdated infrastructure. This limits investment opportunities and widens economic gaps.
- **Security and Resilience.** Recent storms, cyber threats, and substation attacks highlight the need for stronger physical and cyber defenses as well as backup systems such as microgrids.

## THE VOICE OF BUSINESS IN NORTH CAROLINA'S ENERGY FUTURE

This business-driven energy vision is the result of a robust engagement and research process led by the NC Chamber Foundation. From March to May 2025, nearly a dozen confidential listening sessions were held with leaders from a broad spectrum of industries including manufacturing, life sciences, agriculture, healthcare, construction, technology, and retail. Participants came from both rural and urban regions. A statewide survey, guidance from subject-matter experts, and an Energy Vision Steering Committee added further insight.

Firsthand perspectives from business leaders, combined with survey findings and expert input, articulate shared priorities such as reliability, cost predictability, sustainability, and regulatory consistency. The result is North Carolina's first business-driven energy vision, a credible, data-informed roadmap that ensures energy infrastructure remains a catalyst for growth, competitiveness, and prosperity.



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The NC Chamber Foundation recommends seven interconnected pillars for action. Together, they provide a roadmap for securing North Carolina's competitive advantage in energy and economic growth.

- **Build Strong, Secure, and Resilient Infrastructure Capacity.** Invest urgently in upgrading the grid by replacing aging lines, expanding transmission capacity, and deploying smart technologies. These upgrades should be integrated with strong physical and cybersecurity defenses, reinforced substations, and local backup systems such as microgrids. Coordinated long-term planning will keep supply aligned with demand, protect against emerging threats, and ensure businesses never face a capacity shortfall.
- **Treat Reliability as Table Stakes.** Reliability is non-negotiable. Even brief interruptions can halt advanced manufacturing lines, disrupt retail operations, or compromise patient care. To sustain North Carolina's current advantage, utilities must continue hardening and modernizing infrastructure in ways that prevent outages and enable rapid recovery when disruptions occur.
- **Ensure Affordable, Predictable Power.** Competitive energy prices are one of North Carolina's greatest business strengths. Least-cost planning, energy efficiency, and tools such as multi-year rate plans and demand-response programs can help smooth out volatility. Transparent and predictable pricing gives employers and households confidence to plan and invest.
- **Diversify the Energy Mix (All-of-the-Above).** An "all-of-the-above" approach ensures both reliability and resilience. Nuclear and natural gas, with future hydrogen potential, should remain part of the baseload portfolio while the state continues scaling solar, storage, wind, and emerging clean technologies. A balanced mix hedges against fuel price swings and enables growth without sacrificing reliability.
- **Streamline Regulations and Permitting.** Lengthy and inconsistent approval processes are a barrier to timely investment. North Carolina must simplify and better coordinate permitting for power plants, transmission lines, and renewable projects. Standardized and predictable rules, paired with continued opportunities for community input, will accelerate critical infrastructure without sacrificing trust.
- **Bridge the Rural-Urban Energy Gap.** Prosperity should be statewide, not concentrated in metro areas. Investments such as matching grants, rural grid upgrades, local microgrids, and workforce training can strengthen rural communities, close reliability gaps, and attract new industries outside the state's largest cities.
- **Leverage Sustainability as a Competitive Advantage.** Zero-emission energy is increasingly demanded by markets and customers. By accelerating renewable deployment, efficiency, and emerging clean technologies, North Carolina can reduce emissions while also positioning itself as a hub for innovation and job growth in the clean energy economy.

Each pillar is grounded in business input. Energy-intensive companies emphasized reliability and cost clarity, and the pillars work together: stronger infrastructure improves reliability, a balanced energy mix stabilizes prices, and streamlined regulations keep projects on schedule.



**NORTH CAROLINA'S GROWTH STORY IS ALSO AN ENERGY STORY. AS ONE OF THE FASTEST-GROWING STATES IN THE NATION, WE NEED A MODERN, RESILIENT ENERGY SYSTEM TO POWER OUR COMMUNITIES, SUPPORT OUR BUSINESSES, AND SECURE OUR ECONOMIC FUTURE.**

**THIS BUSINESS-DRIVEN ENERGY VISION REFLECTS THE VOICES OF JOB CREATORS FROM EVERY CORNER OF OUR STATE, OFFERING A CLEAR FRAMEWORK TO ENSURE NORTH CAROLINA REMAINS COMPETITIVE, INNOVATIVE, AND WELL-POSITIONED FOR THE DECADES AHEAD."**

**— MEREDITH ARCHIE, PRESIDENT, NC CHAMBER FOUNDATION**

## MOVING FORWARD

Solutions from grid modernization to zero-carbon generation are already underway, but they must be accelerated. Success will require public agencies, regulators, utilities, and industry to work together to coordinate investments, deploy federal funds, and adapt plans as technology evolves.

North Carolina's Business-Driven Energy Vision reflects the voices of job creators from every corner of our state. By committing to these priorities, North Carolina can secure reliable and affordable energy, close regional gaps, and embrace innovation, ensuring our economy remains strong, competitive, and resilient for decades to come.

