

# AI Energy Impacts:

## *AI Ratepayer Impacts*

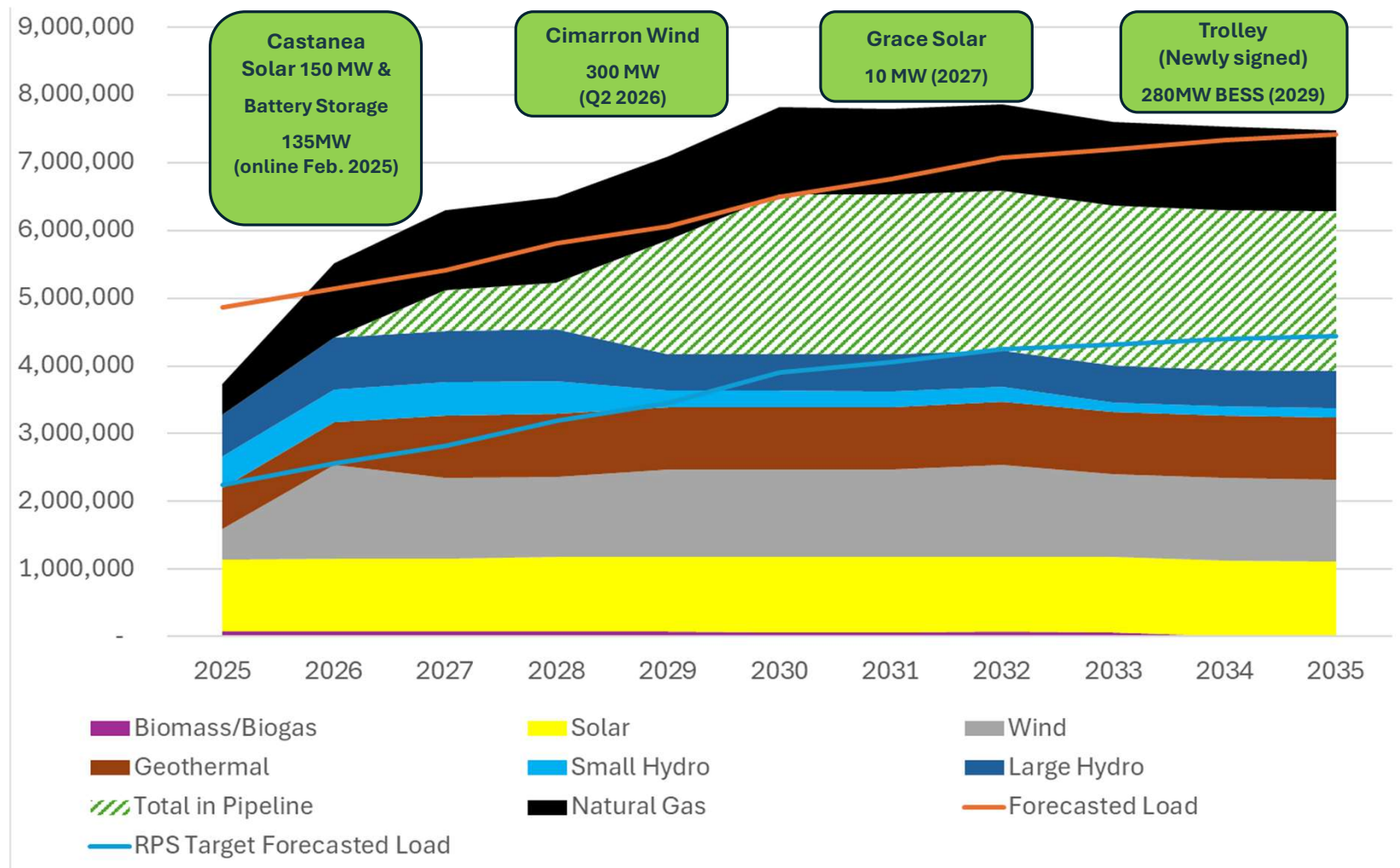
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Electric Utility Director

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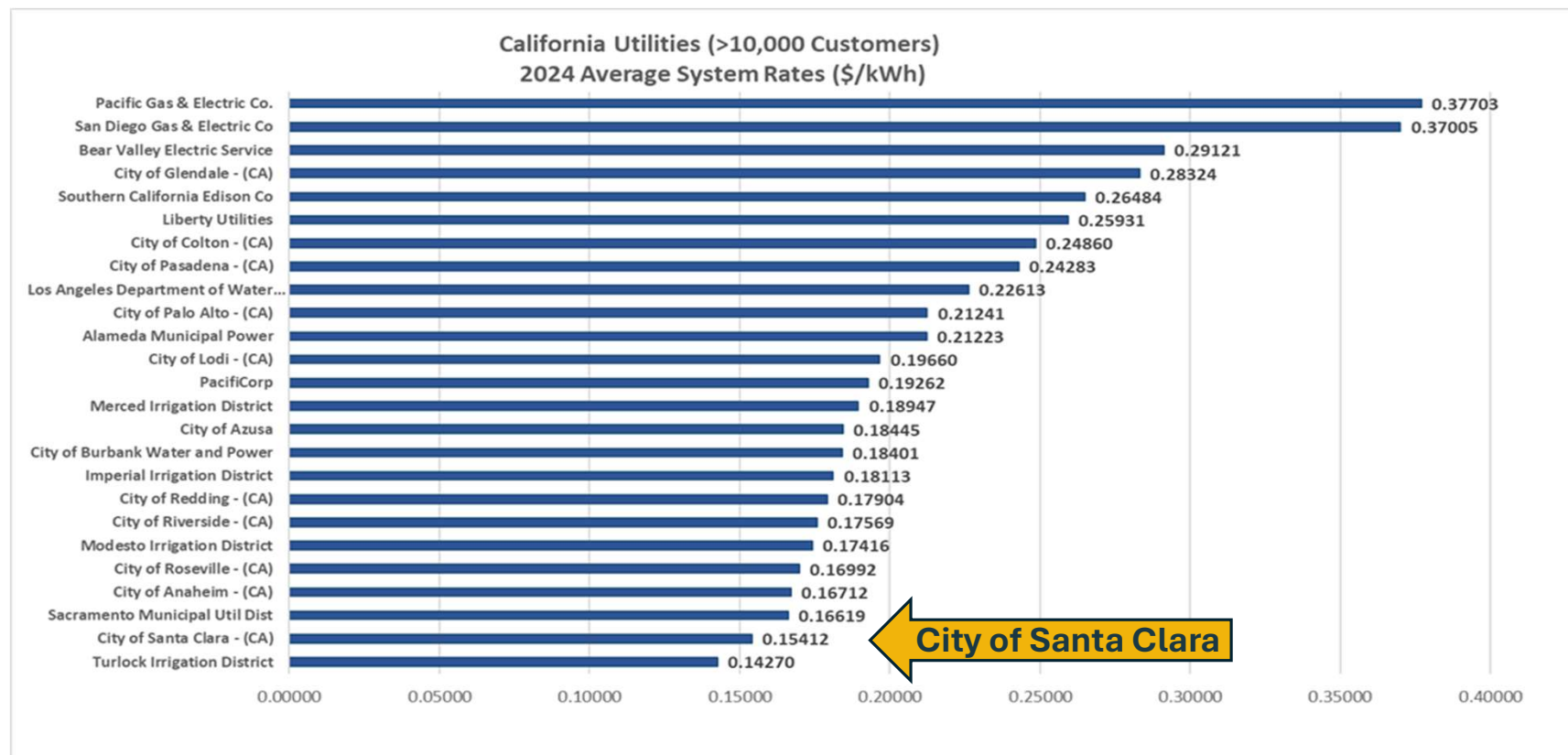


# Resource Stack 2025-2035



# Average System Rate Comparison

## with Utilities in CA



Based on Form EIA-861 - Annual Electric Power Industry Report, collects data from distribution utilities and power marketers of electricity.



# Economic and Rate Benefits

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- Developers directly fund dedicated substations, line extension, and load development fees supporting capital projects
- Developers pay impact fees, i.e., housing
- Provides high, stable, and predictable utility revenue streams, putting downward pressure on utility rates
- Increases property tax revenue
- Increased general fund
- Builds utility reserves
- Local, regional, and state tax benefits



# Challenges Ahead

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## Policy Uncertainty

From Local, State & Federal. Making it hard to plan.

## Tariffs

Increasing equipment costs and limiting sourcing options due to international trade restrictions.

## Project Delays

Large Capital projects have inherent risks in timelines – transmission, local grid expansion, etc.

## Supply Chain

Long lead times and material shortages are delaying critical infrastructure projects.

## Staffing

Difficulty recruiting and retaining skilled workers is slowing project development and operations.

# THANK YOU



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