

# Why Transmission Permit Reform is Critical for Electricity Affordability

July 2026



# Executive Summary

- Electricity demand in the US is **projected to grow at 10x historical rates** through 2035; **prices are rising rapidly** in tandem
- **America is lagging in building energy infrastructure**, especially when compared to China, posing a risk for meeting demand growth, AI development, and national security
- Americans are widely **in favor of new grid infrastructure across the political spectrum**
- **Complex and cumbersome permitting processes** are inhibiting the country's ability to build new grid infrastructure, especially transmission lines
- New transmission infrastructure can **drive down costs and improve reliability**, in addition to creating jobs, facilitating regional investment, and reducing emissions
- Developers are ready to build if permitting rules are reformed; Open Minds has identified **18 “shovel-ready” transmission lines can provide over \$180 billion in net benefits**

# Who Is OpenMinds?

## OUR MISSION

**More energy. Less emissions. Fast.**

- 125+ volunteer experts
- 501(c)(3)
- Disciplined non-partisan selection process
- 360° systems engineering approach

## WHAT MAKES US UNIQUE



**Energy AND climate**

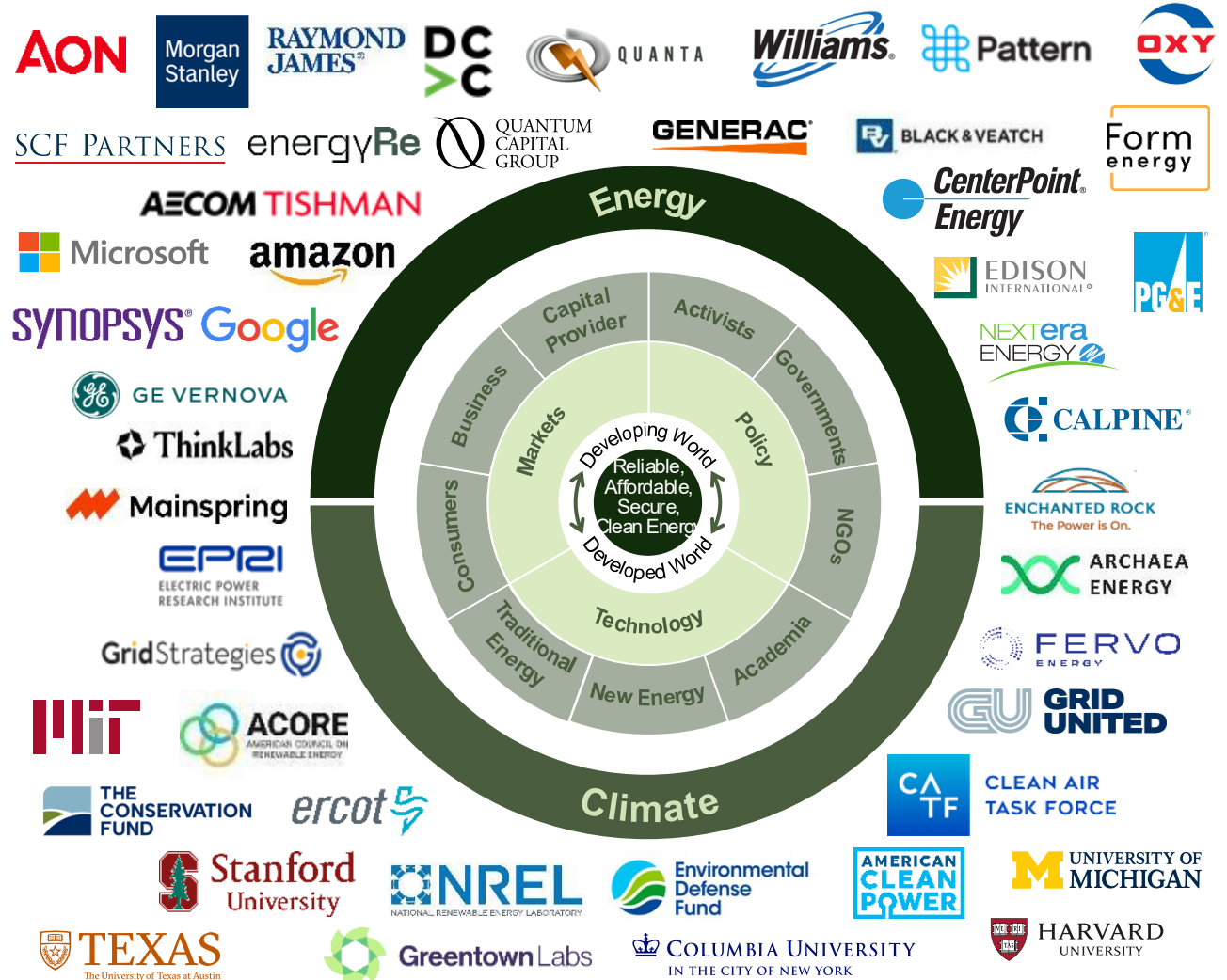


**Cross-functional expert team**



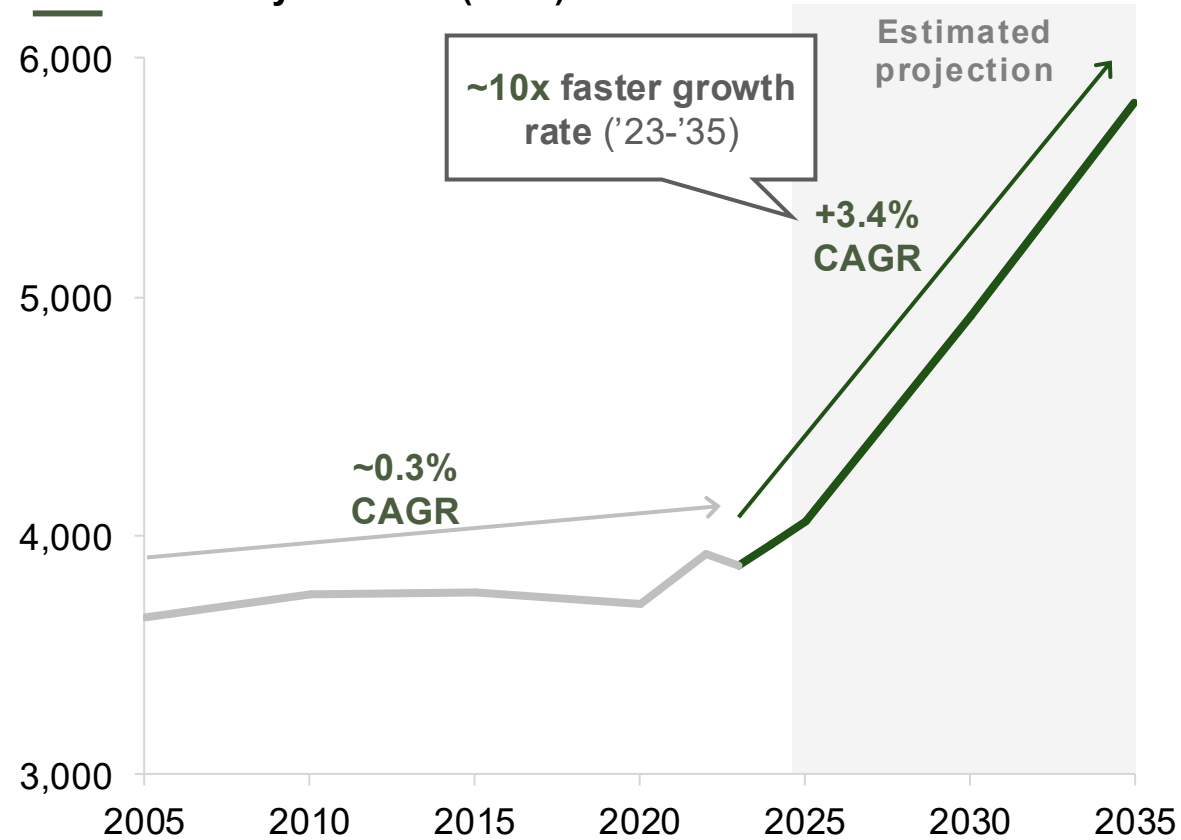
**Data-driven solutions framework**

## OPENMINDS NETWORK

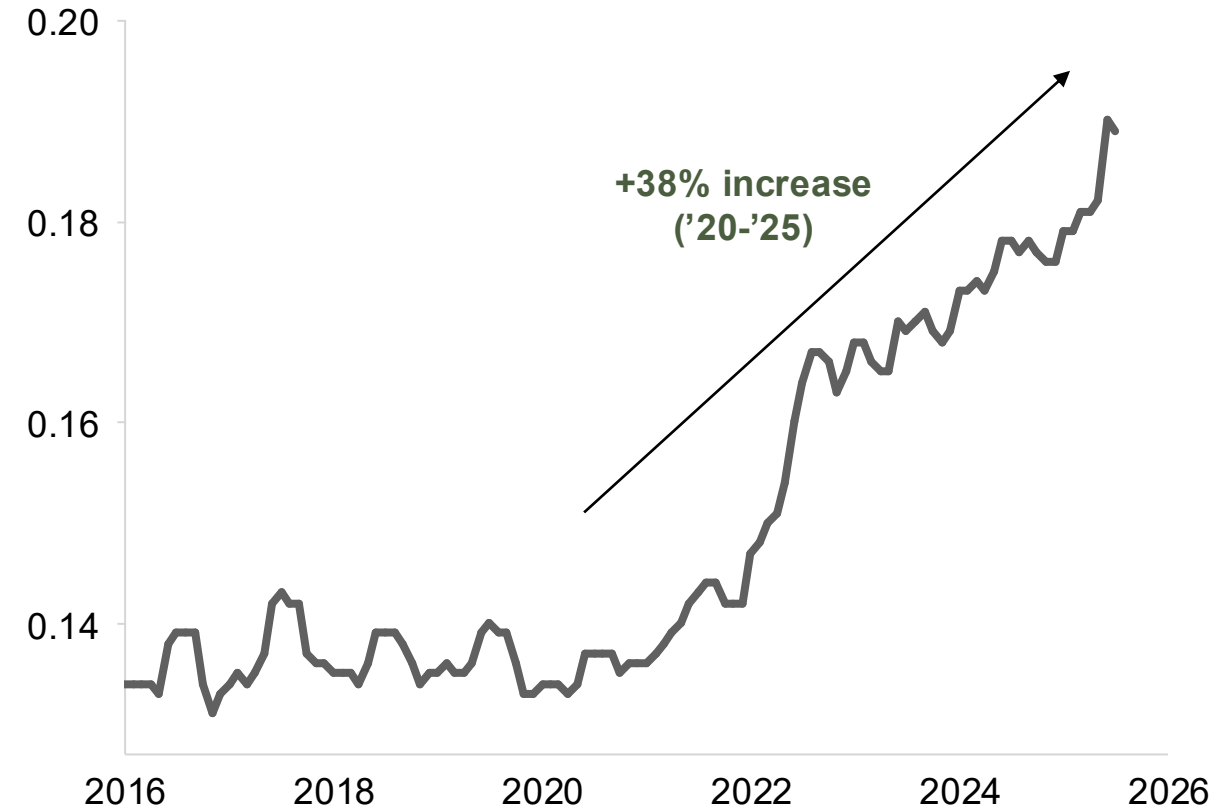


# Electricity Demand And Prices Are Both Growing Rapidly

**U.S. Electricity Demand (TWh)**



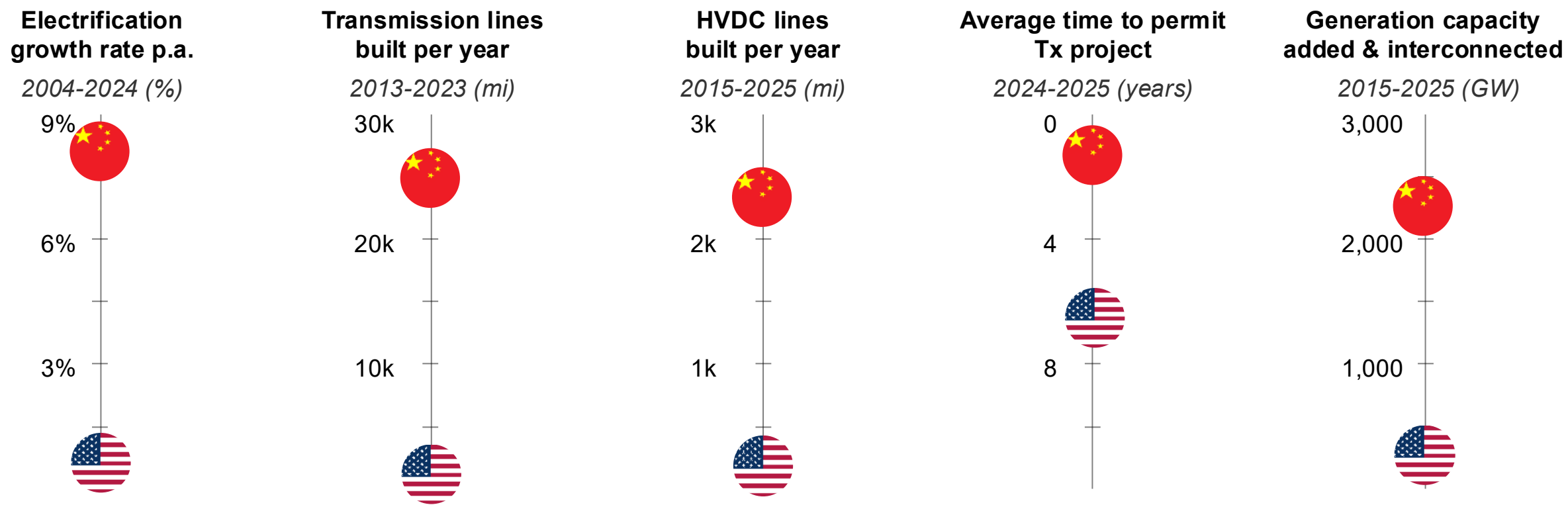
**U.S. Cities Average Electricity Price (US\$/kWh)**



Note: Due to rapidly growing electricity demand (TWh), the grid will need 800GW of additional installed capacity to meet 2035 peak demand using a mix of power sources with varying capacity factors; Estimates for quantity of generation needed by power source use EIA's 2024 average capacity factors for nuclear (92.3%), combined-cycle natural gas (59.9%), and solar (23.4%); US electricity prices are for residential customers only

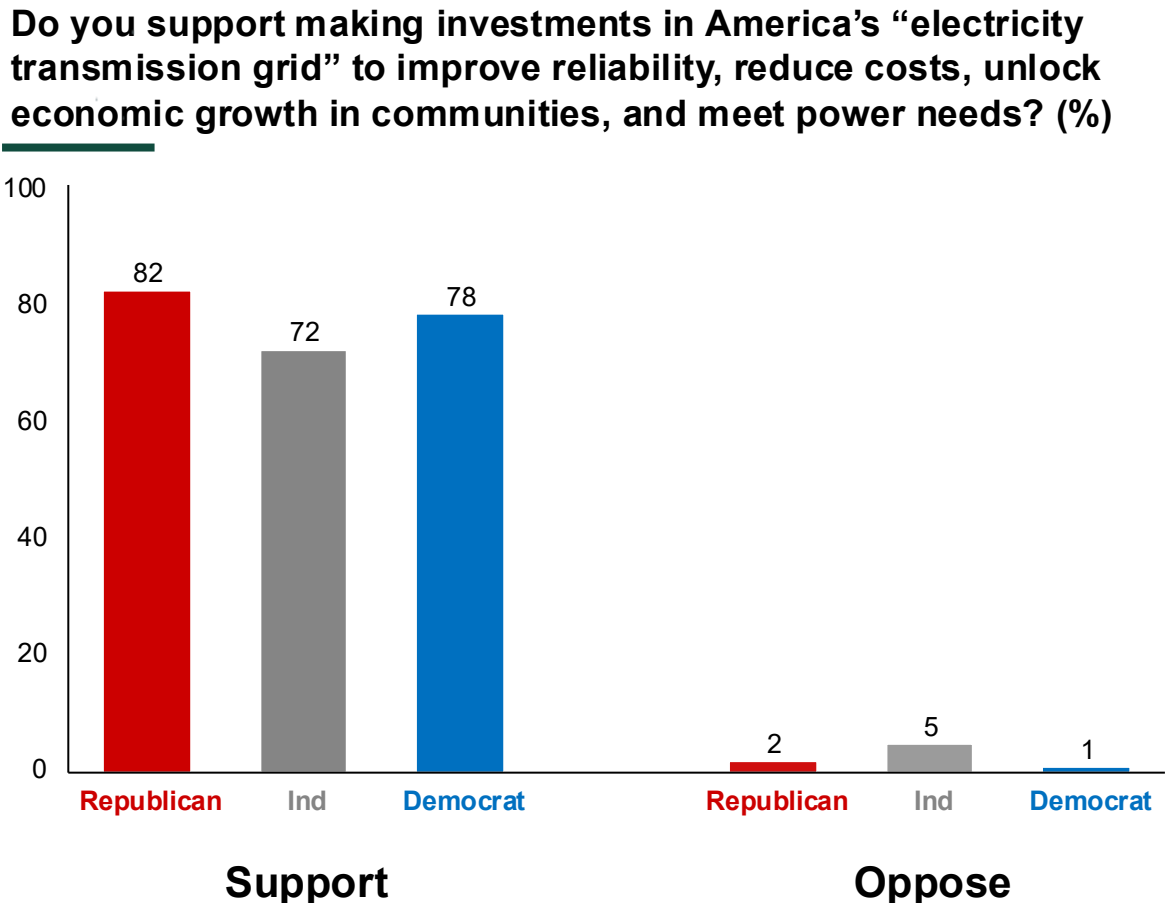
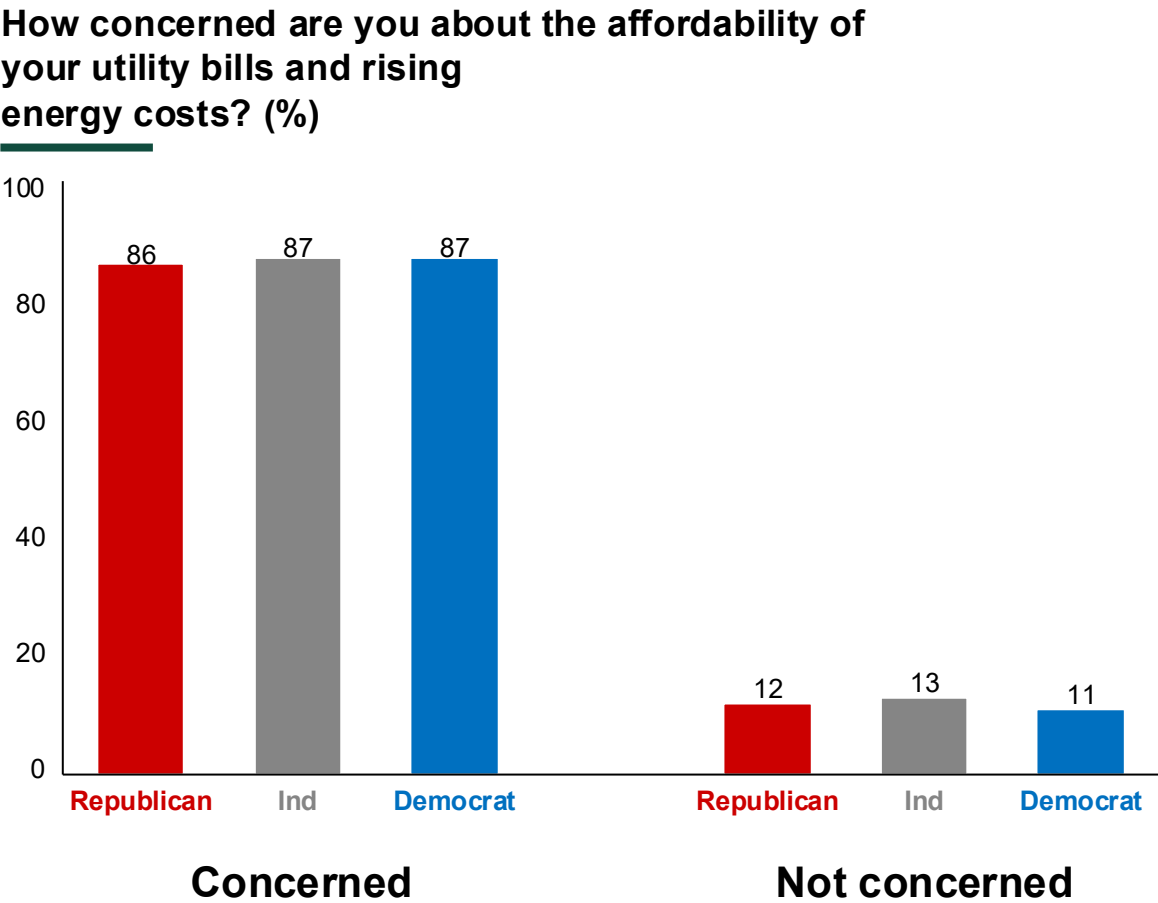
Source: EIA Monthly Energy Review data, OpenMinds P50 model, DOE, EIA, SEIA; [Federal Reserve Bank of St. Louis](#)

# The US Lags In Building Energy Infrastructure, Inhibiting Our Ability to Meet Demand And Posing A National Security Challenge



The US has the innovation, resources, and capital to compete with China, if permitting is supportive

# Americans Are In Favor of New Grid Infrastructure Across the Political Spectrum



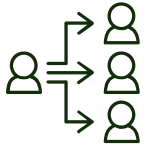
Source: Cygnal, August 2025: Survey of likely general election voters in MISO & PJM regions

# Permitting And Planning Inefficiencies Are Impairing Our Ability To Build New Transmission

## Current Obstacles Caused by Permitting



**Multi-jurisdictional permitting** and siting processes cause delay and allow local interests to block national priorities



No clear and consistent method to **allocate costs** for interregional transmission



Interregional transmission **planning not sufficiently incentivized**



Complex processes **extend timelines for judicial review** and allow special interests to block national projects

## Industry Leaders Are Supportive of Reform

***“The U.S. can’t afford to take 12 years to create this type of solution given the growing need for more energy infrastructure.”***

Hunter Armistead  
CEO, Pattern Energy

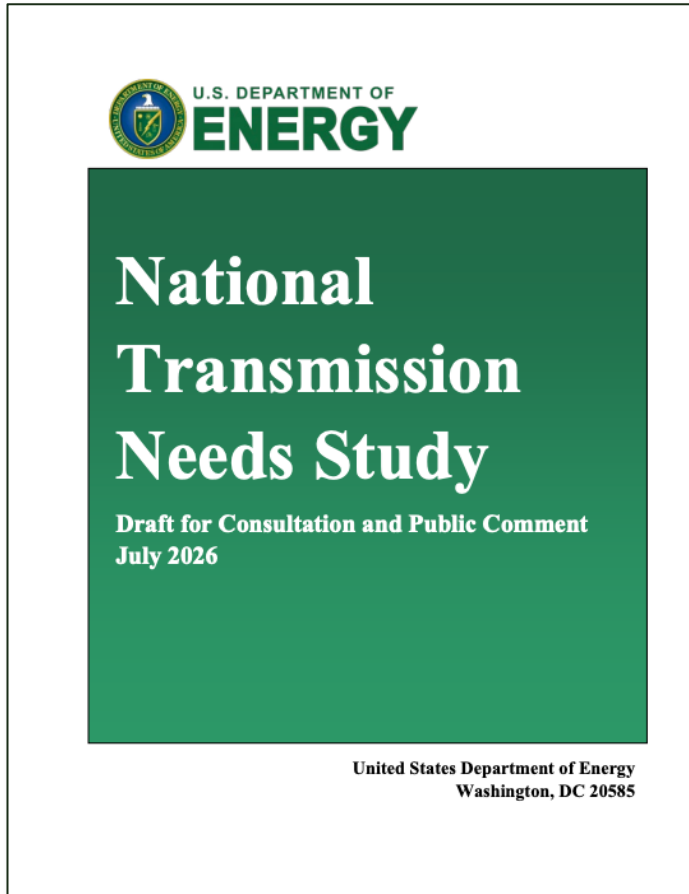
***“[Permitting reform] would significantly increase the pace of transmission development in the country, which is essential to meet our emissions targets.”***

Miguel Prado  
CEO, EnergyRe

***“Energy production and generation really doesn’t matter if we can’t move those electrons across the grid.”***

Gov. Spencer Cox (Utah)

# A New DOE Report Highlights The Need To Accelerate The Development of Transmission



## Key takeaways from the DOE's National Transmission Needs Study

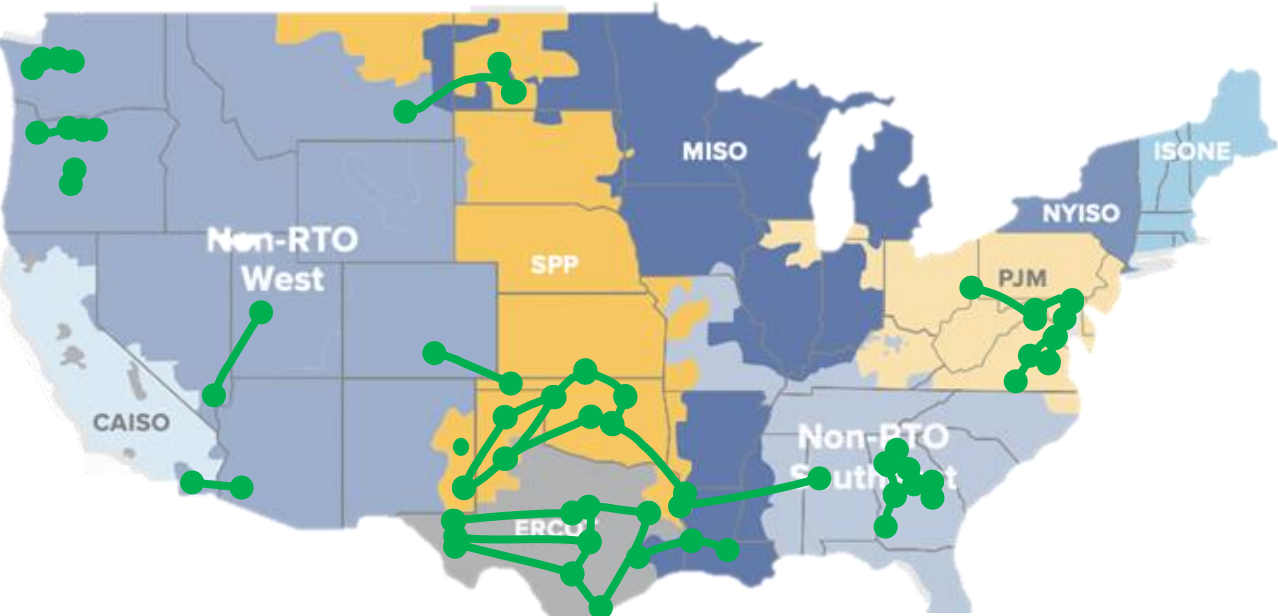
- 1 There is a pressing need for additional transmission infrastructure to **support load growth and reduce wholesale prices**
  - Nationwide grid congestion costs were close to **\$15B p.a. from 2021-2024**
  - The 2024 National Transmission Planning Study estimated that recommended transmission buildout could provide up to \$490 billion in customer cost savings by 2050.
- 2 Increasing **interregional transmission is recognized for its multifold benefits** to customers
  - Investment in transmission **improves reliability** for isolated regions, **strengthens resilience** to extreme events, and **enhances resource adequacy** by allowing regions to share power during peak periods
  - **Cross-interconnection links** are considered the most critical to relieve congestion costs, with average modeled **benefits between \$30-40/MWh**
- 3 Many regional planning entities are approving their largest transmission portfolios ever, **but development processes and timelines remain complex and long**

*"Navigating complex federal, state, and local processes and requirements in efforts to permit and site new lines can be difficult and **result in long development periods**. The problems are **compounded for regional projects that cross multiple states and jurisdictions.**"*

DOE National Transmission Needs Study (2026)

# Transmission Lines Can Have Near-Term Impact: 18 Shovel Ready Lines Can Provide >\$180 Billion In Net Benefits Over 40 Years

## 18 shovel-ready lines have been identified across the country



Projects target areas with **high load growth**:

- Texas
- Virginia
- Southeast
- Northwest

...and **increase transfer capabilities** b/w regions:

- Southwest
- Upper Midwest/Plains
- Intermountain West

## Benefit-to-cost ratios for regional transmission plans

| Region     | Transmission Portfolio | Benefit-to-Cost Ratio |
|------------|------------------------|-----------------------|
| SPP        | 2023 ITP               | \$2.29 to \$1         |
| SPP        | 2024 ITP               | \$6.50 to \$1         |
| SPP        | 2025 ITP               | \$5.70 to \$1         |
| ERCOT      | CREZ                   | \$12.20 to \$1        |
| Nationwide | Avg. portfolio         | \$2.41-\$4.45 to \$1  |

## Benefit-to-cost ratios for interregional transmission projects

| Region                | Transmission Project        | Benefit-to-Cost Ratio |
|-----------------------|-----------------------------|-----------------------|
| MISO, SPP, & the West | North Plains Connector      | \$4.86 to \$1         |
| MISO & Texas          | Southern Spirit             | \$3.64 to \$1         |
| Nationwide            | NERC ITCS Prudent Additions | \$4.30-\$5.80 to \$1  |



# Solving for the Dual Challenge



[openminds203x.org](https://openminds203x.org)