

2025-2026 Legislative Session & Regulatory Update

Alyssa Morrissey, Director of Regulatory and Legislative Affairs
NC Chamber
August 19, 2026

Who We Are

- Largest broad-based business organization in NC representing 29 different industry segments
- Advocacy, Data and Research, Legal Strategies
- Chamber Federation
- Three Pillars:
 - Education and Talent Supply
 - Competitive Business Climate
 - Infrastructure and Growth Leadership



Our team looks forward to working with the N.C. General Assembly to maintain and advance a competitive business climate that grows private-sector jobs as outlined in the NC Chamber's 2026 Jobs Agenda.

Our state's diverse business community recognizes that, at times, you may address complex, sensitive, and controversial issues, we trust you will do so with balance, respect, and an eye on maintaining North Carolina's status as a top state to live and work.

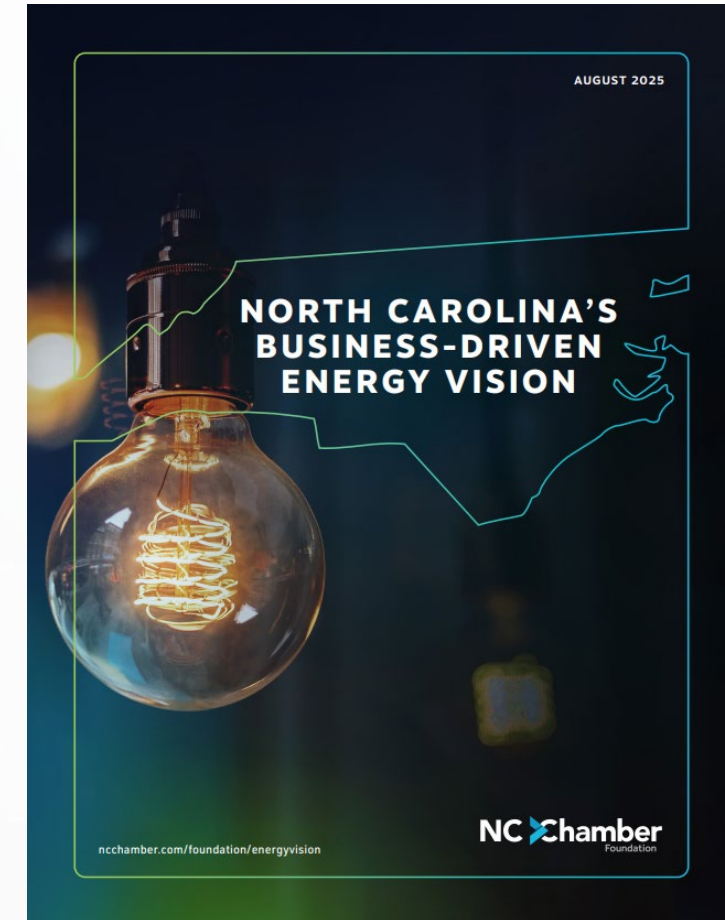
Our goal, as the state's largest and most diverse business organization, will be to never surprise you, maintain high visibility and accessibility when it comes to issues impacting our business climate, and to be direct and communicate our concerns when we believe our status as the leading state for private-sector job creation is at risk.

Issues Overview

- NC Chamber Foundation Reports
 - Energy & Water
- Regulations
- 2025 State Legislation
- 2026 State Legislation

Energy

- NC Chamber Foundation *North Carolina's Business-Driven Energy Vision*
 - Build Strong, Secure, and Resilient Infrastructure Capacity
 - Treat Reliability as Table Stakes
 - Ensure Affordable, Predictable Power
 - Diversify the Energy Mix
 - Streamline Regulations and Permitting
 - Bridge the Rural–Urban Energy Gap
 - Leverage Sustainability as a Competitive Advantage
- Mountain Valley Pipeline Southgate
- Transcontinental Gas Pipeline Co. LLC's (Transco) Southeast Supply Enhancement Project



Water

- NC Chamber Foundation *Water Infrastructure Competitive Analysis*
 - Strengthen Data Collection and Water Availability Studies
 - Incentivize and Fund Regionalization Studies
 - Expand the Existing Readiness Programs
 - Create a State Water Competitiveness Plan
 - Fund Infrastructure Investments and Promote Public–Private Partnerships



Prepared for **NC Chamber**
Foundation



Regulations

- PFAS
 - PFOS, PFOA, GenX Monitoring & Minimization Plan Proposed Rule
 - 15A NCAC 02B .0200 Surface Water Quality Standards
- 15A NCAC 02L Groundwater Quality Standards
- NAAQS PM2.5



2025 Legislation

- ***Session Laws***

- ✓ • SL2025-53/S387 Brownfields Property Reuse Act Revisions
- ✓ • SL2025-82/H402 Limit Rules with Substantial Financial Costs
- ✓ • **SL2025-74/S266 The Power Bill Reduction Act**
- ✓ • SL2025-47/ S391 DOT Omnibus
- ✓ • SL2025-94/H926 Regulatory Reform Act of 2025
- SL2025-77/H694 Regional Water Study/IBT Subbasin/TMDL
- SL2025-74/H850 IBT Moratorium/Study

| This Week at the Capital



2026 Legislation

Session Laws

- ✓ • ***S257 State Budget***
 - Water Safety Act
 - IBT Study and Moratorium extension to Jan 2028
 - Cape Fear IBT Moratorium and Study
 - FAST-41 permitting process for critical energy infrastructure- natural gas and nuclear
 - Establishes non-title V fees in statute
 - Revises motor vehicle emissions inspection requirements for NAAQS non-attainment counties
 - AI environmental permit review pilot program
 - Energy infrastructure tax exemptions
- H162/SL2026-39 Stormwater Control

Active

- *S730 Ratepayer Protection Act*
- H1192 Energy and Housing Affordability Act
- H909 State Infrastructure Bank
- S1010 FUTURE NC Infrastructure Act
- S445 Regulatory Reform Act of 2026

Data Centers

THE BACKBONE OF THE MODERN ECONOMY

Data centers provide the digital backbone for industries and services that touch nearly every aspect of modern life, including:

- **Artificial intelligence** and machine learning
- **Financial services** and **banking** systems
- **Health care** records and medical research
- **Manufacturing** and **supply chain** operations
- **E-commerce** and **logistics** networks
- **Education** and **research** institutions
- **Military** and **national security** operations
- **Government services** and **public safety** systems

ncchamber.com/data-centers

NC Chamber

North Carolina Data Centers BY THE NUMBERS

NC Chamber

ncchamber.com/data-centers

3.3%
of 2025 statewide
energy consumption

Taxpayers Protection Alliance

\$1 billion
Google expansion
announced in 2026

Google

0.2%
of 2025 statewide
water consumption

Taxpayers Protection Alliance

275⁺

permanent Meta jobs
in Rutherford County

Meta

\$10 billion
AWS investment announced in Richmond County
one of the largest single capital investment announcements in the history of the state of North Carolina

EDPNC

Questions?

Thank you!