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SECRETARY OF DEFENSE
1000 DEFENSE PENTAGON
WASHINGTON, DC 20301-1000

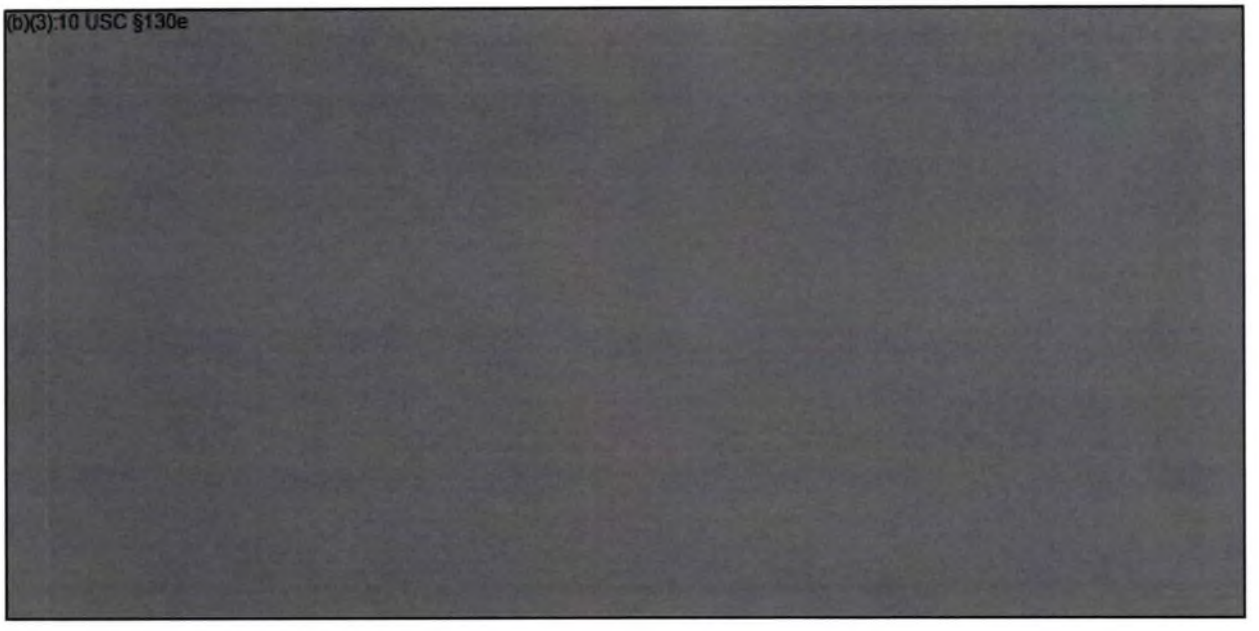
MAR 2 7 2025

MEMORANDUM FOR ASSISTANT TO THE PRESIDENT FOR NATIONAL SECURITY AFFAIRS

SUBJECT: Department of Defense Response to "Executive Order 14156: Declaring a National Energy Emergency, Sec. 7(a). Coordinated Infrastructure Assistance"

At the request of the President in Section 7(a) of Executive Order 14156, "Declaring a National Energy Emergency," the Department of Defense (DoD) assessed the ability to acquire and transport the energy, electricity, and fuels needed to protect the homeland and to conduct operations abroad.

(b)(3):10 USC §130e



The Department stands ready to implement and support the President's agenda for energy dominance.

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Attachment:
DoD Response, Findings, and Recommendations

Classified By: (b)(6)
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Reason: 1.4 (e), (g)
Declassify On: March 15, 2045

~~Controlled by: ODASD(ERO)~~
Categories: CRIT/DCRIT
Limited Dissemination Control: ~~NOFORN~~
~~POC: ODASD(ERO), (571) 256-0793~~

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ATTACHMENT

Department of Defense Response
Executive Order 14156: Declaring a National Energy Emergency
Sec. 7(a). Coordinated Infrastructure Assistance

(U) In collaboration with the Secretaries of Interior and Energy, the Secretary of Defense shall conduct an assessment of the Department of Defense's ability to acquire and transport the energy, electricity, or fuels needed to protect the homeland and to conduct operations abroad, and, within 60 days, shall submit this assessment to the Assistant to the President for National Security Affairs. This assessment shall identify specific vulnerabilities, including, but not limited to, potentially insufficient transportation and refining infrastructure across the Nation, with a focus on such vulnerabilities within the Northeast and West Coast regions of the United States. The assessment shall also identify and recommend the requisite authorities and resources to remedy such vulnerabilities, consistent with applicable law.

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(U) Executive Summary

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(U) Findings

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(U) Resource Recommendations

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(U) Authorities Recommendations

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(U) Introduction

(U) Ensuring a reliable and resilient energy supply is fundamental to the Department of Defense. Whether defending the homeland, deterring conflict, or conducting operations overseas, assured and reliable supplies of energy are essential to the Department's mission of achieving peace through strength. At over 500 installations and in thousands of combat systems in the air, on land, and at sea, the Department depends on an array of energy sources to execute missions at home and abroad, including:

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(U) In response to Executive Order 14156 Section 7(a), the Department, in coordination with the Departments of Energy and Interior, assessed its ability to acquire and transport electricity and fuel needed for mission execution. This assessment identifies key vulnerabilities and recommends actions to mitigate risks to assess its ability to acquire and transport the electricity and fuel needed to defend the homeland and conduct operations abroad. The Department organized this assessment into four sections:

- **(U) Electricity Risks to DoD Missions**: Risks to assured supplies of electricity to DoD installations from infrastructure owned or overseen by DoD.
- **(U) Fuel Risks to DoD Missions**: Risks to the assured supplies of petroleum and natural gas required to support operations at home and aboard.
- **(U) National and Regional Energy Risks**: Systemic risks to DoD from overarching non-DoD electricity, petroleum, and natural gas distribution networks.
- **(U) Recommendations**: Proposed actions to mitigate identified risks and vulnerabilities.

(U) Electricity Risks to DoD Installations

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(U) Electricity risks found within DoD installations include:

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(U) Electricity risks found outside DoD installations include:

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- **(U) Permitting of New Power Generation and Transmission:** As the Department requires assured supplies of electricity, additional power generation and distribution are essential to meeting mission requirements. The Department believes priorities expressed by this Administration will expedite construction of grid projects, but it may take time for these projects to come on-line.
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(U) As these findings suggest, DoD installations are dependent on non-DoD owned infrastructure. With few exceptions however, the DoD has limited resources and authorities to expand, improve, or otherwise enhance non-DoD owned energy infrastructure either within or beyond the fenceline.

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(U) Likewise, the Department can combine third-party financing authorities (e.g., utilities privatization, energy savings performance contracts, utility energy service contract) with Military Construction authorities to enhance non-DoD owned infrastructure. The integration of multiple authorities may enable mission resilience outcomes of more significant impact and scale. However, the complexity and transactional risks make integration of these authorities a challenging and time-consuming solution to known energy risks.

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(U) Fuel Risks to DoD Operations

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(U) Bulk Fuel

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(U) Each Combatant Command (CCMD) drafts extensive OPLANs to establish the forces required, scheme of maneuver, support elements and timelines for actions to be taken in the event of a major contingency. From these OPLANs, a Petroleum War Reserve Requirement (PWRR) is calculated to determine what fuel types and amounts would be required to execute the plan as supply chains transform in response to the transition from a peacetime to wartime footing.

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(U) The Department's PWRR informs the procurement of Prepositioned War Reserve Stocks (PWRS), which are allocated against specified OPLANs (including for homeland and overseas) and stored in locations with the appropriate capacity and proximity to expected OPLAN execution locations. To reduce transportation timelines and ensure immediate availability of fuel in a time of crisis, DoD uses PWRS to address the inevitable surge in demand during contingencies. PWRS is allocated to support specific operation plans and sized to enable a certain number of days of operation ("days of supply") before requiring refueling.

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(U) Based on this approach to bulk fuel operations, the Department identified the following vulnerability related to fuel for operations:

(U) Bulk Fuel Refining

(U) DoD is fully reliant on commercial refining capacity to procure bulk fuel. While bulk fuel consumed at home is primary procured at home, the Department reduces cost, complexity, and risk by purchasing fuel overseas. In fact, nearly 50% of DoD fuel in FY 2024 was purchased overseas to support the operations and sustainment of forces permanently stationed and temporarily deployed overseas.

(U) Once an extended homeland operation exceeds the days of supply in our war reserve stocks, DoD will begin to purchase jet fuel and marine diesel from the domestic U.S. market. Similarly, our war planning assumes loss of access to foreign sourced fuel. While this is factored into the size of our war reserve stocks for fuel, an extended overseas conflict also will cause the Department to begin buying jet fuel and marine diesel from the domestic U.S. market. Depending on the resilience of domestic U.S. refining infrastructure, DoD may encounter competition with commercial customers amid static or shrinking production quantities.

(U) DoD also faced a limited set of commercial refineries for JP-5, which is a jet fuel consumed by the U.S. Navy and selected navies around the globe. The relatively small global market for JP-5, along with the cost and complexities associated with meeting the unique safety requirements of aviation at sea provide limited incentives for most refineries to produce JP-5. Since Jet A cannot be additized to become JP-5, the Department faces significant risk of not having sufficient JP-5 to meet extended duration operations over time.

(U) Bulk Fuel Storage

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(U) The effect of this funding gap for bulk fuel storage is two-fold. First, the bulk fuel storage requirements for strategic missions and COCOM priorities are only partially funded. Available funding is insufficient to meet the warfighting requirements and urgent repairs in the homeland and overseas. Second, the larger set of unfunded projects contribute to a growing backlog of aging storage infrastructure that can cause long-term degradations in day-to-day operations and readiness and possibly be unreliable during a crisis. For example, the Department of Navy (DON) utilities backlog is about $20 billion, and the Army utilities backlog is about $14.2 billion for FY 2026.

(U) The Department is currently experimenting with another storage model that introduces mobility into the calculus—fuel afloat in tankers. Fuel afloat provides mobility to prepositioned war reserves, increasing flexibility in meeting changing fuel needs as well as complicating adversary targeting. While this concept is still in its initial phases, known challenges to fully optimize this model for fuel storage lie in the cost of additional tankers and crews, funding limits on war reserve fuel capacity, and challenges associated with further transfer of fuel from a large tanker to the point of need within the theater of operation.

(U) Bulk Fuel Distribution

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(U) Natural Gas at DoD Installations

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(U) State Level Regulations

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(U) Resource Extraction

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(U) National and Regional Energy Risks

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(U) Electricity

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(U) Regional Electric Grids

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(U) National Increases in Demand for Power

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(U) Petroleum

(U) DoD operations within the United States depends on a dense commercial network of petroleum refineries, product pipelines, and storage.

(U) Petroleum Refining and Distribution

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(U) New England

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(U) West Coast

(U) California's fuel market has experienced increasingly limited refining capacity due to multiple refinery closures in recent years. As refineries close, regional fuel supply chains become more susceptible to disruption. The West Coast is characterized by three sub-regions: Pacific Northwest, Northern California, and Southern California.

(U) In the Pacific Northwest, crude oil is supplied to regional refineries by the Trans Mountain Pipeline from Alberta, Canada, by rail movements from Canada and the Bakken, and by waterborne imports. There are five operating refineries in and around Puget Sound, WA but no refineries in Oregon or eastern Washington. The 300,000 barrel per day (b/d) Olympic Pipeline, which runs from the refinery cluster in Washington to Seattle and Portland is the main north-

south corridor for petroleum product transportation in the region. Disruptions to flows on the Olympic Pipeline can have a major effect on regional supply. Many of the storage and distribution terminals connected to the pipeline lack other supply options. Refined products are also shipped by marine vessel from refinery docks to supply global markets and other regions within the region (especially distillate fuel and jet fuel).

(U) There is no pipeline infrastructure to move product across the Cascade Range, and the only connection between the western and eastern portions of the region is marine transport along the Columbia River. As a result, eastern Washington is primarily supplied with product via the Northwest Products Pipeline and the Yellowstone Pipeline from refineries in the Rocky Mountain region, such as Salt Lake City, UT and Billings, MT.

(U) Northern California has three operating refineries in the San Francisco Bay area. Crude oil is supplied to the San Francisco area refineries mainly via marine vessel as foreign imports and Alaskan crude oil. Some California-produced crude is also transported by pipeline from the San Joaquin Valley to these refineries.

(U) Refined products are then shipped by the Kinder Morgan pipeline system from the refineries in San Francisco to storage and distribution terminals in the San Francisco area and to terminals further inland in Fresno and Chico, CA, and in Nevada. The Concord pipeline junction is the gathering and entry point for the Kinder Morgan pipeline system, the main distribution artery for the region. Finally, production from refineries in Northern California regularly supplies parts of Southern California and Oregon by marine vessel.

(U) In Southern California, there are five operating refineries, all located in the Los Angeles area, and these refineries supply most of the motor gasoline, jet fuel, and distillate consumed in the region. Production from the refineries moves primarily by pipeline from the Los Angeles area to bulk storage and distribution terminals throughout Southern California (including to San Diego) and Southern Nevada (Las Vegas, NV). Product from the Los Angeles area also supplies the Phoenix, Arizona area via the Kinder Morgan West Line pipeline.

(U) Natural Gas

(U) Given the regional focus areas highlighted in the Executive Order, the section below reviews the overall civilian natural gas supply chains serving the Northeast and West Coast of the United States.

(U) Northeast, defined as New England

(U) New England relies on natural gas for home heating and to fuel ~40% of the region's power generation.

(U) As of the end of 2019, U.S. Energy Information Administration estimated natural gas pipeline capacity into New England from both Canada and New York was 5.2 Bcf/d. During days of peak demand in the winter, most of this capacity is fully utilized, which can lead to spikes in spot natural gas prices and, in turn, wholesale electricity prices. Algonquin Pipeline and Tennessee Gas Pipeline are the two key arteries for natural gas into the region.

(U) During winter, timely natural gas supply provided by imports of liquefied natural gas (LNG) at the major regasification facility Everett LNG Terminal, located near Boston, plays an important role in meeting peak demand moderating natural gas prices in the region. A second LNG import terminal—Excelerate Energy's Northeast Gateway—is a floating storage and regasification unit (FSRU) located 13 miles offshore Boston.

(U) West Coast, defined as CA, WA, and OR

(U) California produces less than 1% of U.S. gas. Several interstate natural gas pipelines enter the state from Arizona, Nevada, and Oregon and bring natural gas into California from the Southwest, the Rocky Mountain region, as well as western Canada, with almost all the gas delivered to California used in the state. California's peak natural gas demand is during the winter months, with small peaks during the high electricity demand periods of the summertime.

(U) Washington receives nearly all its natural gas from Canada directly via the Enbridge Westcoast Pipeline, and by way of Idaho. The Sumas Center is a major natural gas hub located in Canada near the border with Washington. More than two-thirds of the natural gas that enters the state continues south to Oregon and other states.

(U) Most of the natural gas consumed in Oregon is supplied by pipelines that bring gas from western Canada and Nevada. Almost all natural gas that enters Oregon continues on to California markets.

(U) Recommendations

(U) This report identified vulnerabilities to the generation, storage, and distribution of fuel and electricity required to defend the homeland and conduct operations overseas. Based on vulnerabilities to fuel and electricity, the Department identified the following recommendations for resources and authorities:

(U) Resource Recommendations

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(U) Authorities Recommendations

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Appendix A:

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