Energy Infrastructure and the Defense Industrial Base: Center for Strategic & International Studies Report

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04/15/2026

The Center for Strategic & International Studies ("CSIS") issued a March 2026 report titled:

Energy Infrastructure and the Defense Industrial Base ("Report").

The Report was authored by:

- Joseph Majkut.
- Alexander Palmer.
- Raj Sawhney.

CSIS describes itself as a:

… bipartisan, nonprofit policy research organization dedicated to advancing practical ideas to address the world's greatest challenges.

The Report addresses the following issue:

… Can the energy infrastructure serving the U.S. defense industrial base sustain production under mobilization?

The Report focuses on three scenarios for mobilization that it characterizes as consistent with:

- Baseline production.
- Defense buildup.
- Peer war.

The authors are stated to have used embodied energy methods to estimate that war production rates would require 17.4 petajoules (PJ) of energy annually. It is described as a relatively small amount nationally, but one that would need to be concentrated at facilities in already stressed grid regions. This is stated to be due to facilities for the defense-critical production of steel, aluminum, titanium, and semiconductors being clustered in regions already facing:

- Eroding reserve margins.
- Surging data center demands.

An additional concern is stated to be natural gas deliverability constraints because key facilities depend on gas both as direct fuel and as the primary source of regional electricity generation.

The Report's recommendations include:

- Extending defense-critical electric infrastructure designations to industrial nodes.

- Creating dedicated permitting and finance pathways to facilitate energy production.
- Integrating energy resilience into supply chain risk assessments.

Components of the Report include:

- DEFINING MOBILIZATION
- DEFENSE PRODUCTION ENERGY NEEDS
- MOBILIZATION ENERGY DEMAND
- REGIONAL VULNERABILITIES
- ELECTRICITY GRID VULNERABILITIES AND CRITICAL INDUSTRY CONCENTRATION
- GAS DELIVERABILITY CONSTRAINTS
- COMPOUNDED EXPOSURE AND ITS IMPLICATIONS
- DATA CENTER DEMAND AS ADDITIONAL GRID PRESSURE
- POLICY IMPLICATIONS AND PATHWAYS FORWARD

A copy of the Report can be found here.