Indiana Utility Regulatory Commission Summer Reliability Forum

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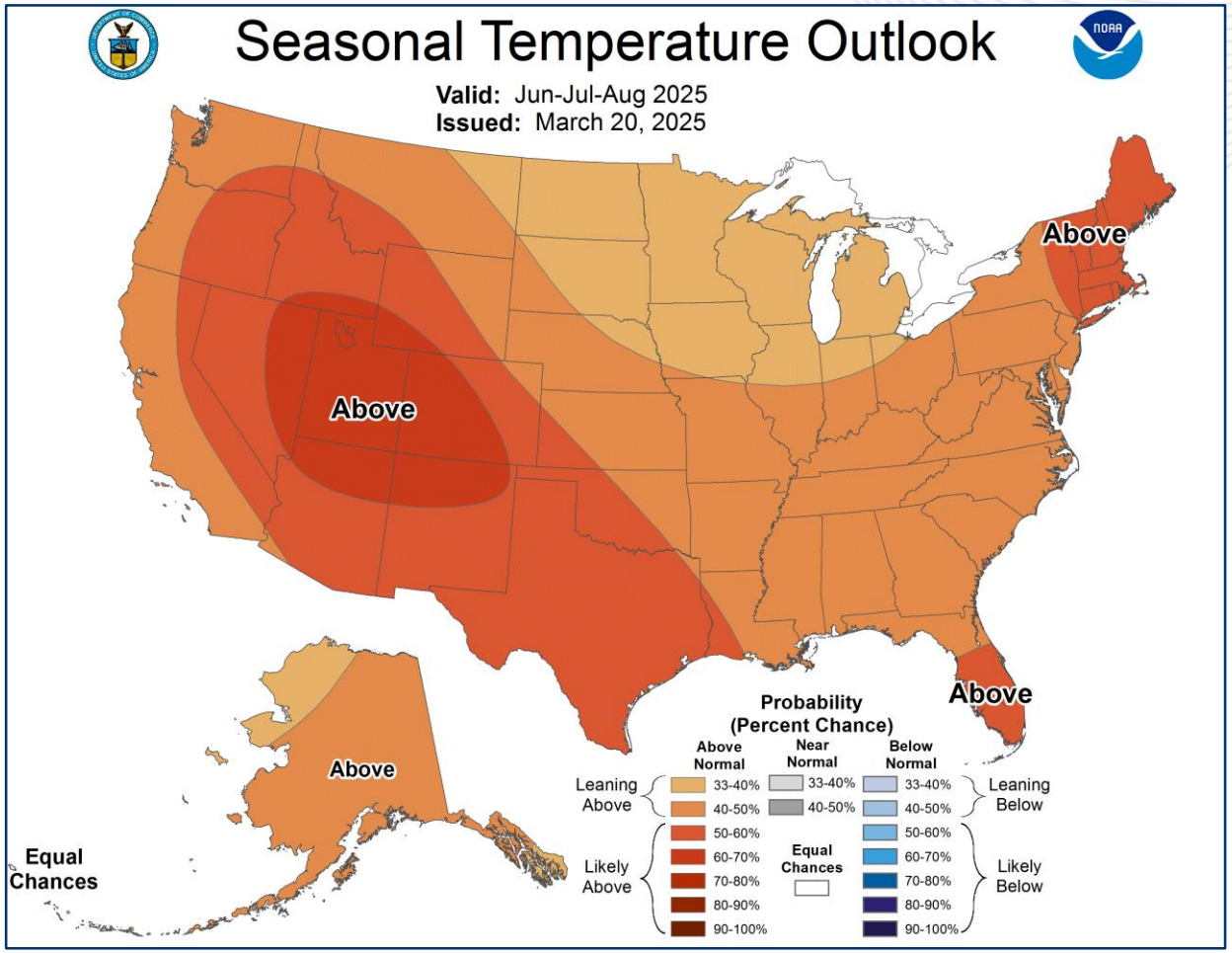
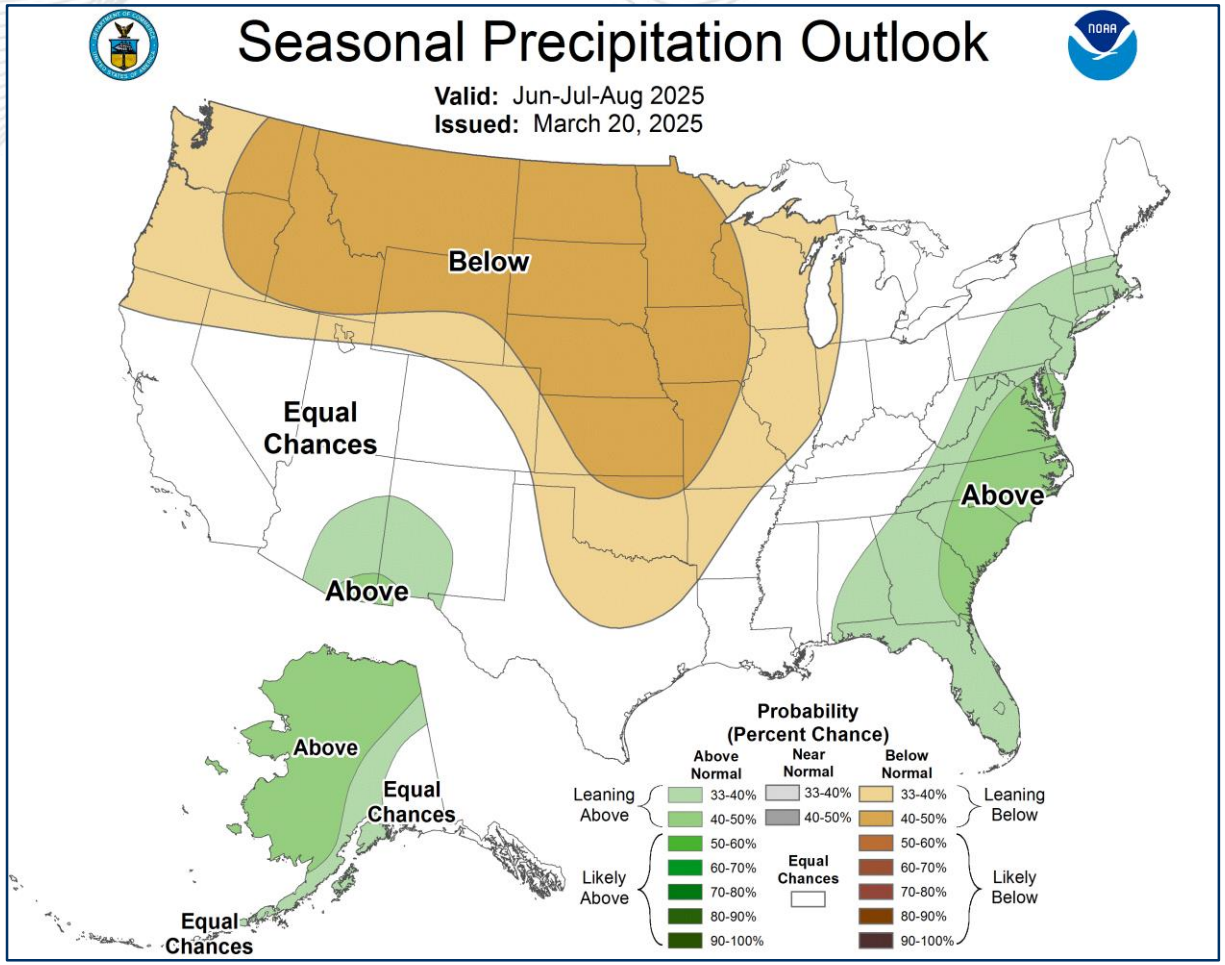
Executive Director, PJM System Operations
May 20, 2025

Agenda

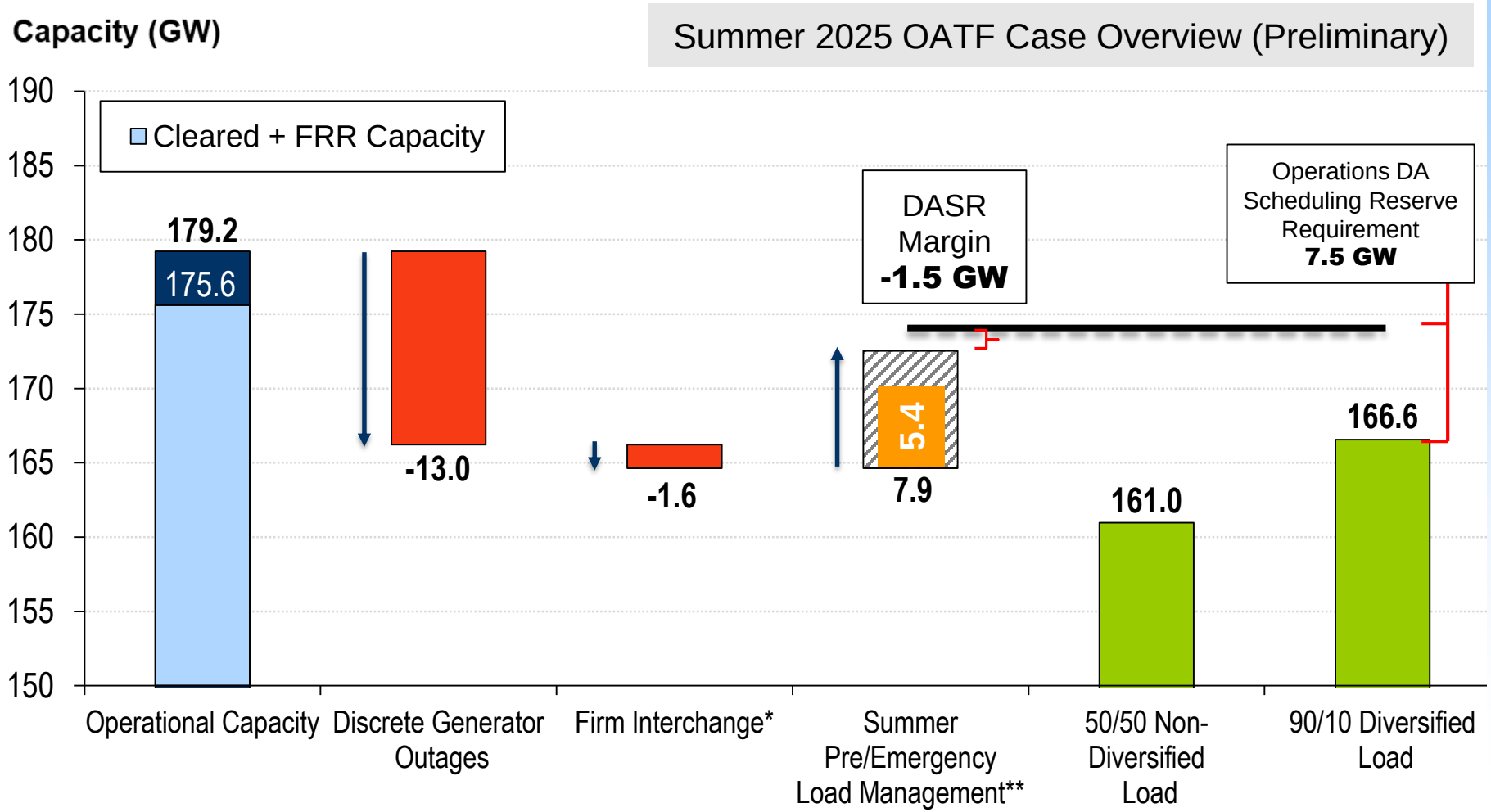
- Summer Readiness/Sensitivity Analysis
- Large Load Additions
- Summer Preparedness/Gas Accreditation
- Capacity Market

CPC/NOAA Summer Outlook





Waterfall Chart
(Summer 2025 – Preliminary)



Anticipated PJM Actions To Reliably Serve the 90/10 Forecast:

1. Issue Max Gen/Load Management Alert (DA).
2. Schedule all available generation (DA).
3. Curtail all recallable exports (RT).
4. Implement Demand Response (~**5.4 GW**) to maintain Primary Reserve Requirement of 3.5 GW (RT).

1,600 MW out of the total **net interchange (4,200 MW) are capacity-backed exports. ** 97% of Load Management is pre-emergency.*

2025 Summer OATF Study

Sensitivity Studies	RESULTS
External Contingencies Impactful to PJM Reliability	**No Reliability Concerns**
N-1-1 Relay Trip Conditions	**No Reliability Concerns**
Max-Cred Contingency Analysis	**No Reliability Concerns**
90/10 Load Forecast Study (166,562 MW diversified peak load forecast)	**No Reliability Concerns**
Solar and Wind Generation Sensitivity Study	**No Reliability Concerns**
Transfer Interface Analysis	**No Reliability Concerns**
BGE/PEPCO Import Capability	**No Reliability Concerns**

50/50 modeled load forecast: ***160,961 MW***

90/10 modeled load forecast: ***166,562 MW***

Summer Preparedness

- NERC/RF/SERC Summer Prep Activities
- Seasonal Fuel Inventory and Emissions Data Request
- Pre-Summer Reactive Capability Verification
- Maintenance Margin/Basic Values and Generation Outages
- Seasonal Capacity and Deliverability Analysis
- Periodic Fuel and Non-Fuel Consumables Inventory Data Requests
- RTO-Wide Summer Emergency Procedures Drill
- SERC and NPCC Summer Operations and Capacity Projections
- NYISO, MISO, TVA and CPL Seasonal Readiness Meetings

Process for Large Load Adjustments

July
PJM requests information on potential load adjustments.

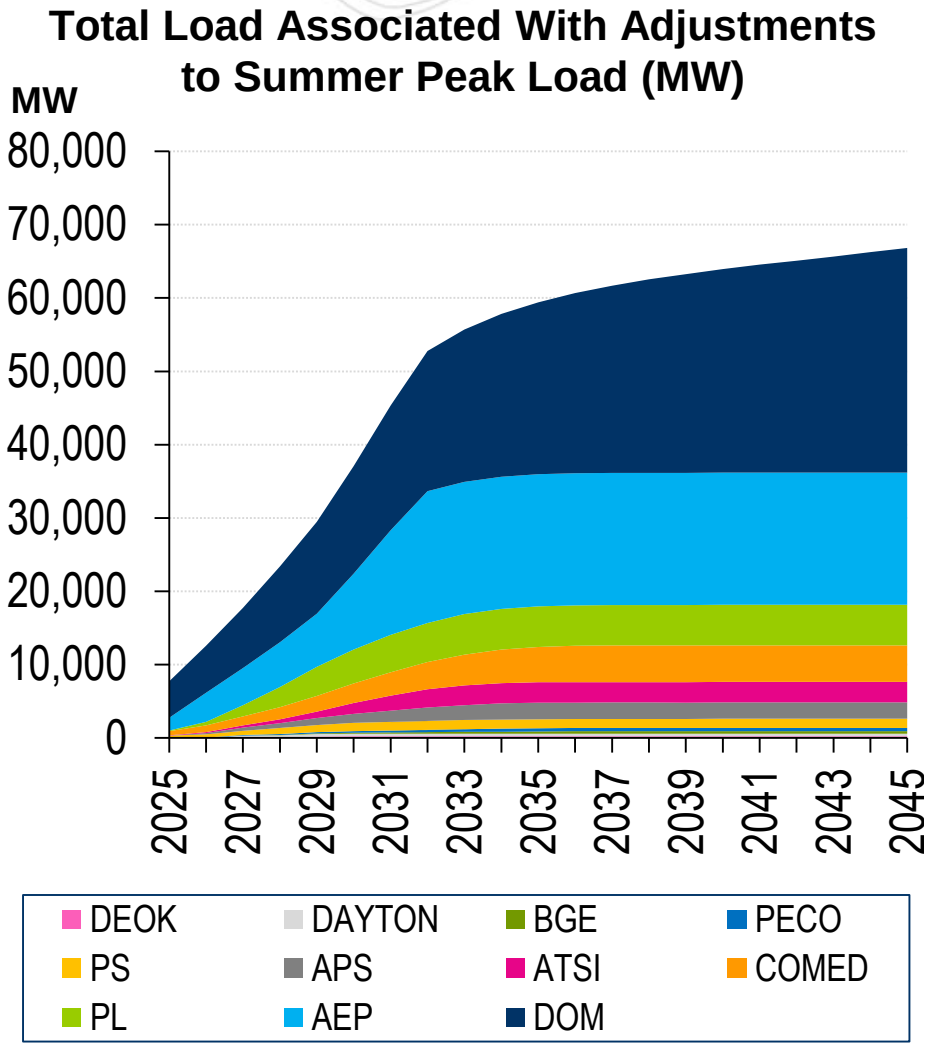
September
PJM receives information on load adjustments and begins evaluation.

October
Members present on load adjustments to Load Analysis Subcommittee.

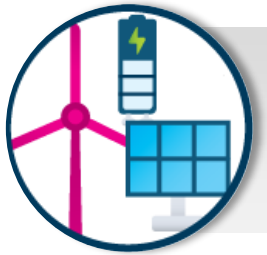
November
PJM continues evaluation and presented ***preliminary*** accepted requests to Load Analysis Subcommittee.

January
PJM presents and posts official PJM Load Forecast.

Manual 19: Attachment B



ACTIONS TAKEN TO ADD GENERATION



Elimination of the Prior Must-Offer Exemption

Reliability Must Run

Reliability Resource Initiative

Demand Response

Surplus Interconnection Service

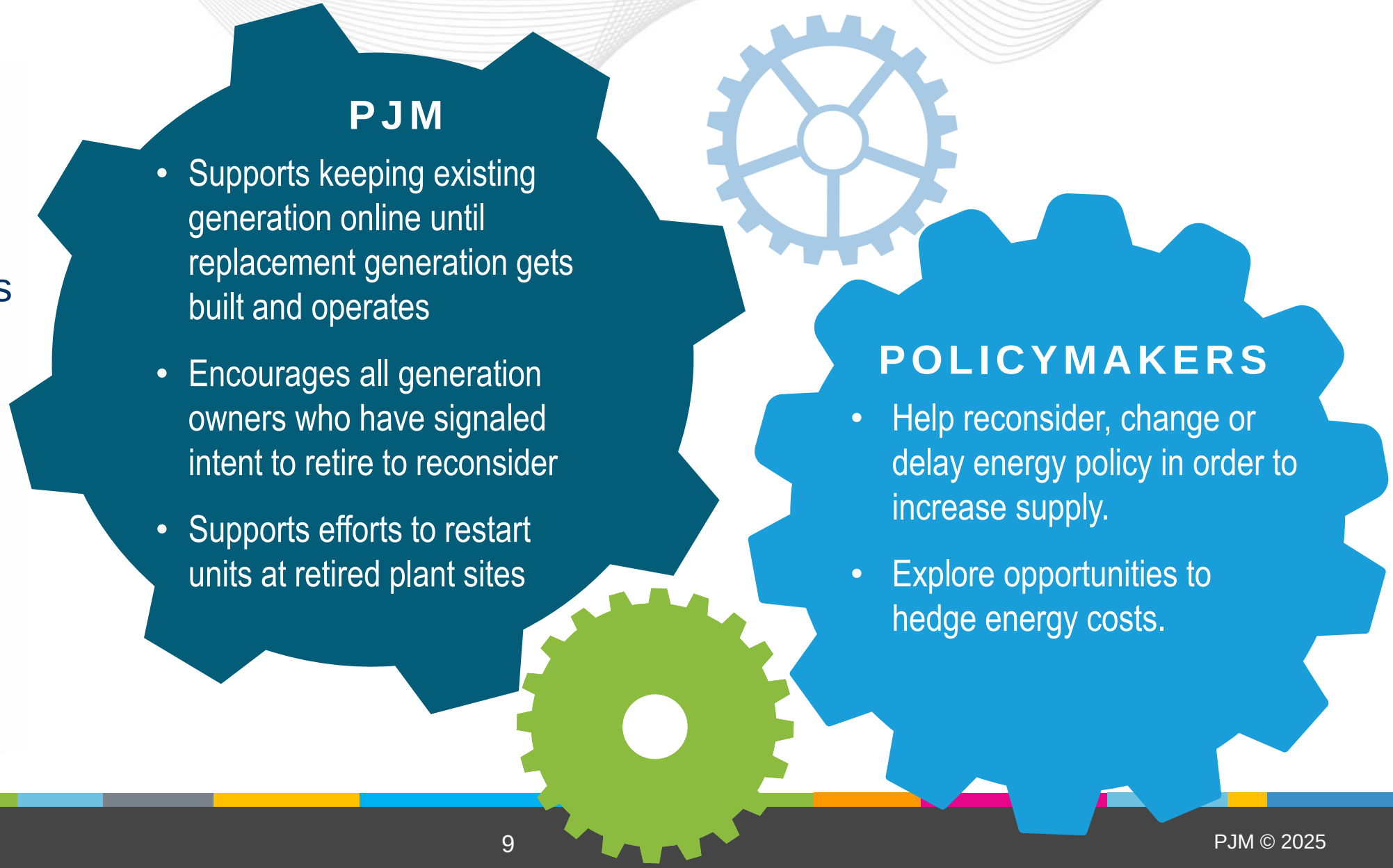
ACTIONS UNDERWAY TO ADD SUPPLY

FERC considering Capacity Interconnection Rights transfer proposal.

Collaboration with stakeholders on Demand Response and market rules

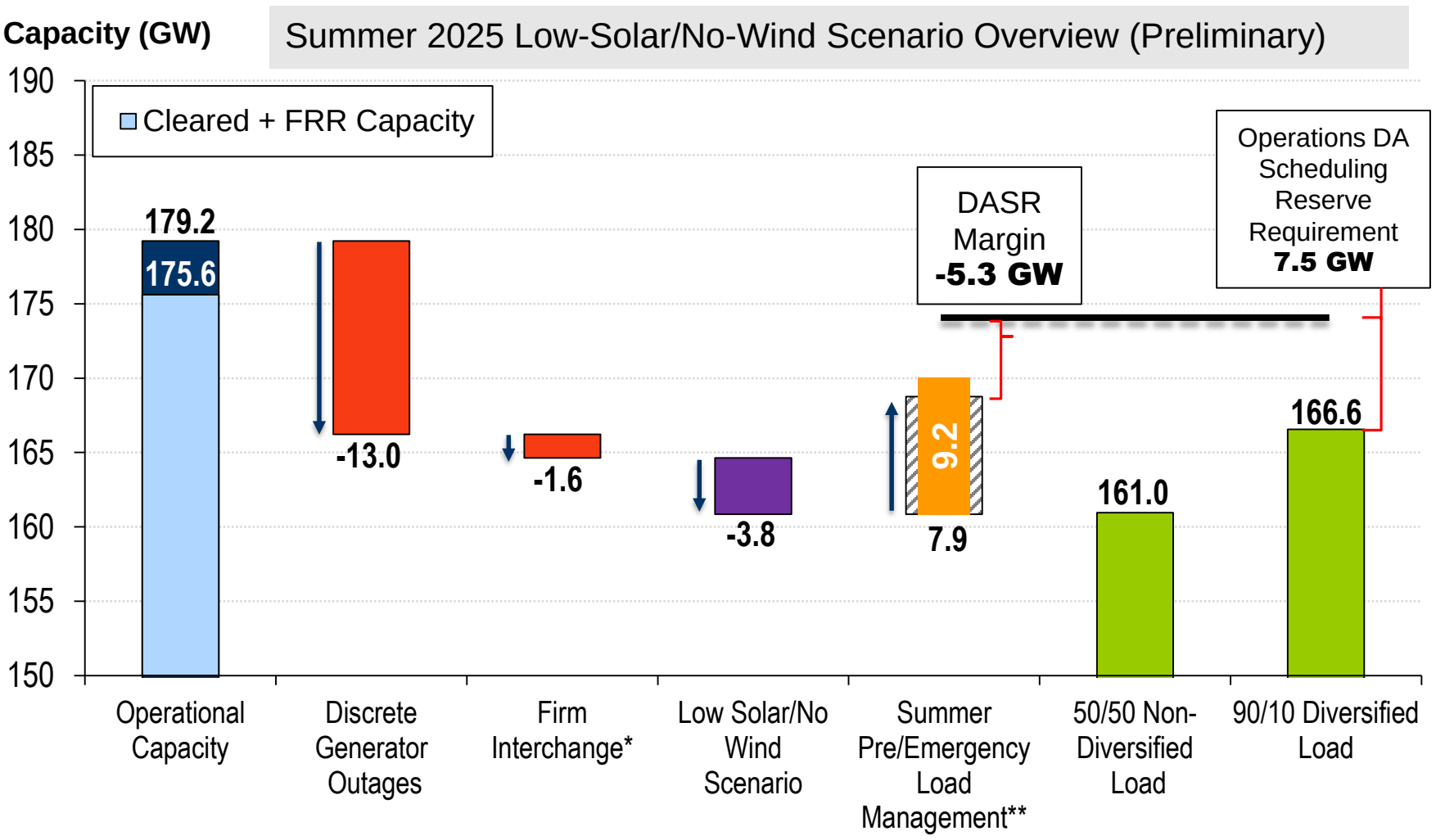
How We Work Together – You Can Help

States and stakeholder actions can help mitigate price increases and support grid reliability during this era of tightened supply.



Appendix

Low-Solar and No-Wind Scenario
(Summer 2025 – Preliminary)



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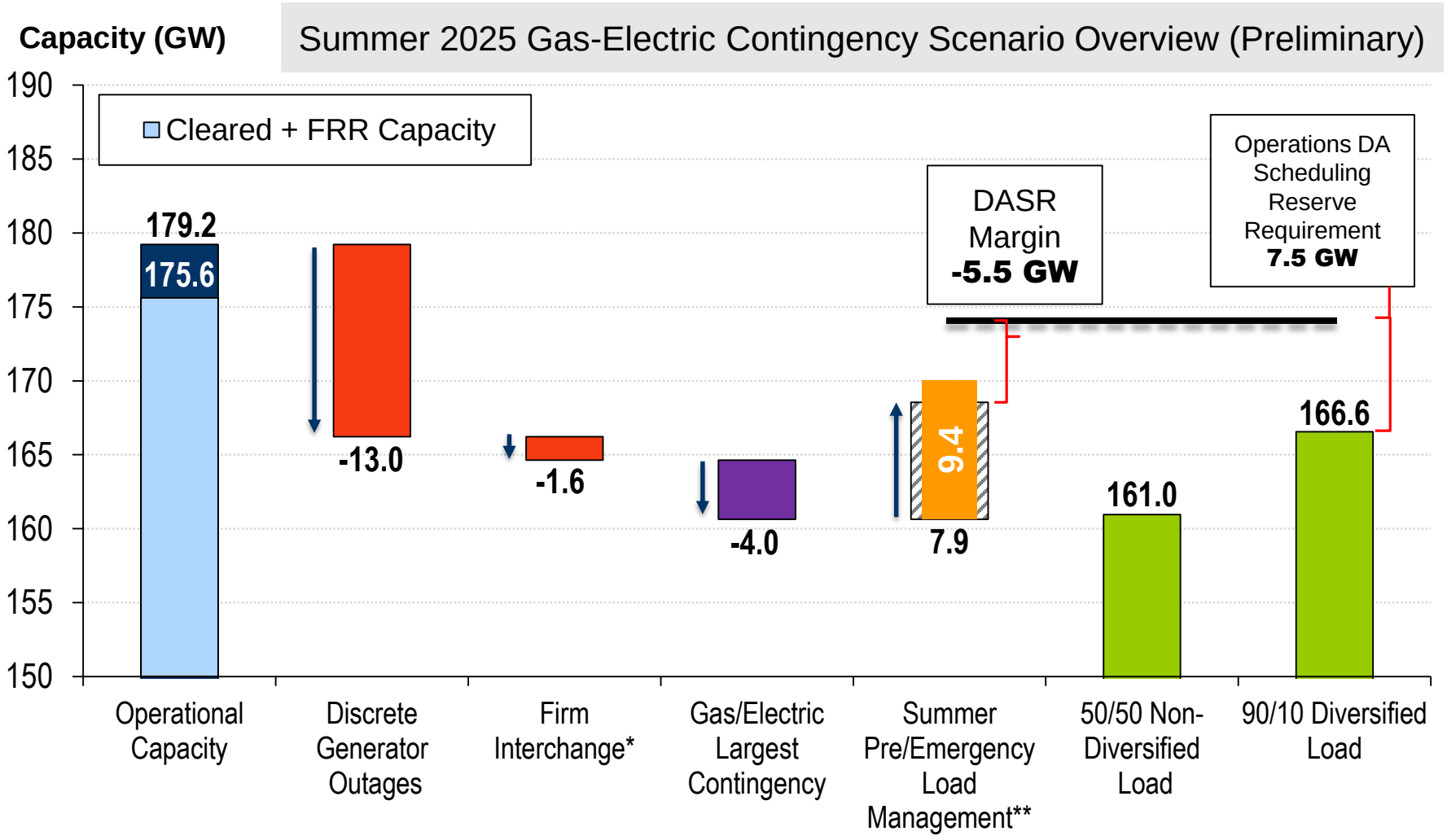
4. Implement **all** Demand Response (**7.9 GW**) to meet the load + Primary Reserve Requirement of 3.5 GW (RT).
5. Call Maximum Emergency energy into capacity and purchase emergency energy (If available) to address the **1.3 GW shortfall.**
6. Initiate escalating Emergency Procedures if needed (RT).

1,600 MW out of the total **net interchange (4,200,MW) are capacity-backed exports.*
*** 97% of Load Management is pre-emergency.*

Gas-Electric Contingency Scenario
(Summer 2025 – Preliminary)



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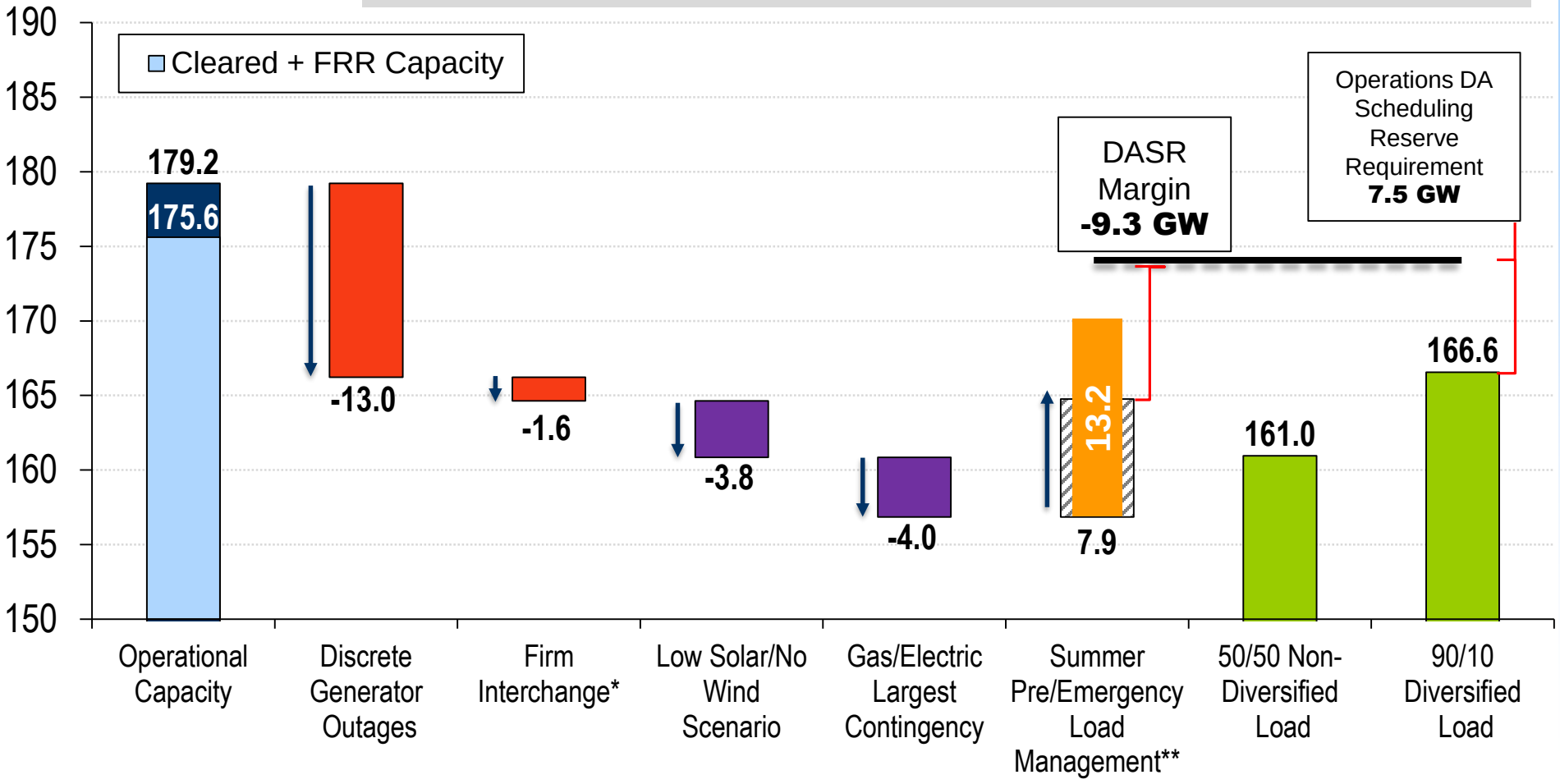
Stressed System Scenario
(Summer 2025 – Preliminary)

Summer 2025 Stressed System Scenario Overview (Preliminary)



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