

March 5, 2026

*Via Overnight Mail*

Illinois Environmental Protection Agency  
 Bureau of Water  
 DWPC Permit Section #15  
 2520 W Iles Ave  
 Springfield, IL 62704  
 Attn: Steve Nightingale

**Re: Midwest Generation, LLC – Powerton Generating Station  
 Account No. W1978010008  
 NPDES Permit No. IL0002232  
 Certification Statement for Protections given at 40 CFR §423.18(a)(3)**

Dear Mr. Nightingale:

In accordance with the requirements of 40 CFR §423.19(i), this letter and attachments comprise the one-time certification statement required for sources seeking to apply the protections given at 40 CFR §423.18(a)(3). Powerton Generating Station (“Powerton”, or “the Station”) operates two coal-fired electric generating units (“EGUs”), Unit 5 and Unit 6 (collectively “the Units”), and is located in Pekin, Tazewell County. The Units are subject to the Effluent Limit Guidelines for Steam Electric Power Generators (“ELG”) as the applicability is defined in 40 CFR §423.10. Powerton is owned and operated by Midwest Generation, LLC (“MWG”).

**Information required by 40 CFR §423.19(i)(2)(i)**

Requirement	Response
The qualifying event from the list in §423.18(a):	See Attachment 1, a reliability-related agreement with the competent electricity regulator, PJM Interconnection, L.L.C. (“PJM”) which results in the Powerton Units operating in a way not contemplated when the certification was made (“the Agreement”)
The entity that issued or triggered the event:	PJM
The date that such an event was issued or triggered:	February 11, 2026

The documentation of the qualifying event from PJM is attached as Attachment 1. 40 CFR §423.19(i)(2)(ii). The analysis and accompanying narrative discussion demonstrating that the

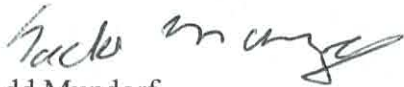
Units would have qualified for the subcategory at issue absent the event detailed are included in Attachments 2, 3, and 4. 40 CFR §423.19(i)(2)(iii).

Operation of the Units beyond December 31, 2028 was not contemplated when the Notice of Planned Participation was submitted in October 2021. For reasons described in this certification statement, MWG will make the Units available for the upcoming PJM 2028/2029 delivery year base residual auction. MWG understands that by submitting this certification statement, the Units shall continue to qualify as permanently ceasing the combustion of coal by December 31, 2028 as given at 40 CFR §423.18(b).

I certify under penalty of law that this document and all attachments were prepared under my direction or supervision in accordance with a system designed to assure that qualified personnel properly gather and evaluate the information submitted. Based on my inquiry of the person or persons who manage the system, or those persons directly responsible for gathering the information, the information submitted is, to the best of my knowledge and belief, true, accurate, and complete. I am aware that there are significant penalties for submitting false information, including the possibility of fine and imprisonment for knowing violations.

If you have any questions regarding this submittal, contact me at [Todd.Mundorf@nrg.com](mailto:Todd.Mundorf@nrg.com) or Ms. Jill Buckley at [Jill.Buckley@nrg.com](mailto:Jill.Buckley@nrg.com).

Sincerely,



Todd Mundorf  
Plant Manager  
Powerton Generating Station

Enclosures: Attachment 1 – February 11, 2026 Agreement between PJM and MWG  
Attachment 2 - Analysis and Narrative Discussion  
Attachment 3 - February 10, 2026 Illinois EPA Concurrence  
Attachment 4 – February 17, 2026 PJM Letter

Attachment 1 – February 11, 2026 Agreement between PJM and  
MWG



PJM Interconnection, L.L.C.  
2750 Monroe Boulevard  
Audubon, PA 19403-2497

Michael Bryson  
Senior Vice President, Operations  
[Michael.Bryson@pjm.com](mailto:Michael.Bryson@pjm.com)  
(610) 666-4659

December 23, 2025

Midwest Generation, LLC  
Attn. Bradley Kranz  
Powerton Generating Station  
13082 E. Manito Road  
Pekin, IL 60087

Re: Powerton Generating Station

Dear Mr. Kranz,

PJM understands from Midwest Generation, LLC (“MWG”) – the owner of the Powerton Generating Station, which is a 1,538 MW (ICAP) coal-fired generation resource located in Pekin, Illinois – that on October 13, 2021, MWG submitted a Notice of Planned Participation (“NOPP”) certification for Powerton Unit 5 and Unit 6 to the Illinois Environmental Protection Agency pursuant to 40 CFR 423.19(g)(1) that states that Powerton Units 5 and 6 will permanently cease coal combustion through retirement of these units by December 31, 2028.

PJM further understands from MWG that if Powerton Units 5 and 6 were to permanently cease operation, 271.5 MW (ICAP) of additional generation resources from the Fisk and Waukegan generation facilities, located in Chicago, Illinois and Waukegan, Illinois, respectively would also permanently deactivate.

As your company is aware, the President and the Secretary of Energy have declared that an “emergency” exists that poses a threat to the reliability and the ability to serve load, including emergent data centers needed to help fuel the United States’s advancements in artificial intelligence (“AI”), due to a projected shortage of electric energy and a shortage of facilities for the generation of electric energy.<sup>1</sup> This energy emergency threatens national security and has put pressure on consumers.<sup>2</sup> The Executive Branch has made it national policy to “utilize all

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<sup>1</sup> See, e.g., DOE Order 202-25-4, Emergency Order (May 30, 2025), <https://www.energy.gov/sites/default/files/2025-05/Federal%20Power%20Act%20Section%20202%28c%29%20PJM%20Interconnection.pdf>; DOE Order 202-25-8, Emergency Order (Aug. 28, 2025), <https://www.energy.gov/sites/default/files/2025-08/202c%20Order%20No.%20202-25-8.pdf>. supply and infrastructure causes and makes worse the high energy prices that devastate Americans, particularly

<sup>2</sup> Exec. Order No. 14156, 90 Fed. Reg. 8433 (Jan. 29, 2025) (“EO 14156”) (discussing the national security interest in “a reliable, diversified, and affordable supply of energy” and stating that “our Nation’s inadequate energy those living on low- and fixed-incomes.”). See also Exec. Order No. 14262, 90 Fed. Reg. 15521 (Apr. 14, 2025) (“EO 14262”) (“The United States is experiencing an unprecedented surge in electricity demand driven by rapid technological advancements, including the expansion of artificial intelligence data centers and an increase in domestic manufacturing. This increase in demand, coupled with existing capacity challenges, places a significant strain on our Nation’s electric grid. Lack of reliability in the electric grid puts the national and economic security of the American people at risk. The United States’ ability to remain at the forefront of technological innovation

available power generation resources . . . ”<sup>3</sup> to preserve the reliability of the bulk electric power system. Executive Order No. 14262 provides that the Secretary of Energy shall “prevent” consistent with applicable law “an identified generation resource in excess of 50 megawatts of nameplate capacity from leaving the bulk-power system.”<sup>4</sup>

The Executive Branch has also articulated principles the industry should be exploring to support grid reliability by, among other things: (1) “safeguard[ing] existing assets and ensur[ing] an uninterrupted and affordable supply of power;” (2) offering “innovative ways to harness existing capacity;” (3) promoting resource adequacy; (4) “[o]ptimiz[ing] existing grid resources as much as possible” to deliver capacity to the system; and (5) supporting the procurement of capacity from “dispatchable power sources as quickly as possible.”<sup>5</sup>

As a PJM Member, MWG has committed to cooperate in the coordinated planning and operation of the facilities within the PJM Region so as to obtain the greatest practicable degree of reliability, compatible economy and other advantages from such coordinated planning and operation in a manner consistent with PJM governing documents.<sup>6</sup>

MWG has also agreed to “[c]ooperate with the other Members and the Office of the Interconnection in the analysis, formulation and implementation of plans to prevent or eliminate conditions that impair the reliability of the PJM Region[.]”<sup>7</sup>

“Consistent with Good Utility Practice, [PJM] shall be authorized to direct or coordinate corrective action, whether or not specified in the PJM Manuals, as necessary to alleviate unusual conditions that threaten the integrity or reliability of the PJM Region, or the regional power system.”<sup>8</sup>

The Department of Energy has found that unusual conditions exist in the PJM Region that threaten the integrity or reliability of the PJM Region. Furthermore, the 2027/2028 Base

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depends on a reliable supply of energy from all available electric generation sources and the integrity of our Nation’s electric grid.”).

<sup>3</sup> See EO 14262, 90 Fed. Reg. 15521 (“It is the policy of the United States to ensure the reliability, resilience, and security of the electric power grid. It is further the policy of the United States that in order to ensure adequate and reliable electric generation in America, to meet growing electricity demand, and to address the national emergency declared pursuant to [EO 14156], our electric grid must utilize all available power generation resources, particularly those secure, redundant fuel supplies that are capable of extended operations.”).

<sup>4</sup> *Id.* at 15522 (stating that the Secretary of Energy should “prevent,” as he “deems appropriate and consistent with applicable law . . . an identified generation resource in excess of 50 megawatts of nameplate capacity from leaving the bulk-power system or converting the source of fuel of such generation resource if such conversion would result in a net reduction in accredited generating capacity”).

<sup>5</sup> See The White House, *Winning the Race: America’s AI Action Plan*, at 15-16 (July 2025), <https://www.whitehouse.gov/wp-content/uploads/2025/07/Americas-AI-Action-Plan.pdf>.

<sup>6</sup> Operating Agreement, section 11.3.2.

<sup>7</sup> *Id.* at section 11.3.2(g); *see also* section 11.3.2(b).

<sup>8</sup> Tariff, Attachment K-Appendix, section 1.7.15; *see also* Operating Agreement, section 11.3.4.

Residual Auction results released on December 17, 2025 indicate that PJM procured short of its reliability requirement by 6,623 MW, meaning that the committed supply is less than what would be required to meet the one-event-in-10-year reliability standard of a 20% reserve margin.

Considering present facts and pursuant to PJM’s authority, PJM requests MWG’s cooperation in formulating and implementing a plan to help prevent and mitigate these unusual system conditions that impair the reliability of the PJM Region. Specifically, PJM requests MWG’s cooperation to take all necessary steps consistent with 40 C.F.R. § 423.18(a)(3),<sup>9</sup> to avoid deactivation of the Powerton Generating Station by December 31, 2028, including continued operation until at least September 2030, which will also have the impact of preserving the availability of the Fisk and Waukegan units to provide generation support to the PJM Region. PJM will continue to work with MWG to assess the impact, if any, of the Illinois Climate and Equitable Jobs Act (“CEJA”) on the Powerton Generating Station’s operations.

As a Regional Transmission Organization and independent system operator, PJM Interconnection, L.L.C. (“PJM”) fits within the meaning of a “competent electricity regulator” as that term is used in 40 C.F.R. § 423.18(a)(3). PJM understands that if MWG is willing to continue operating the Powerton Generating Station beyond December 31, 2028, the facility would be operating in a way not contemplated when Powerton Generating Station made its NOPP certification.

Please have a duly authorized officer of MWG respond as soon as possible to this letter to signify whether PJM’s proposed plan is agreeable to support system reliability in the PJM Region.

Regards,

/s/Michael E. Bryson

Michael E. Bryson  
Senior Vice President, Operations  
PJM Interconnection, L.L.C.

*On behalf of PJM Interconnection, L.L.C.*

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<sup>9</sup> 40 CFR § 423.18 (a)(3) states:

All permits subject to this part shall include the following permit conditions:

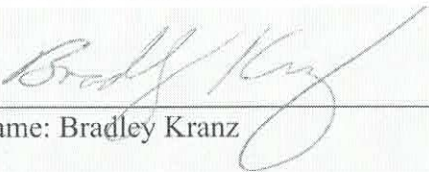
- (a) An electric generating unit shall qualify as a low utilization electric generating unit, permanently ceasing the combustion of coal by December 31, 2028, or permanently ceasing the combustion of coal by December 31, 2034, if such qualification would have been demonstrated absent the following qualifying event:

\* \* \*

- (3) Any other reliability-related order, energy emergency alert, or agreement issued by a competent electricity regulator (e.g., an independent system operator) which results in that electric generating unit operating in a way not contemplated when the certification was made; or

PROPOSED PLAN AGREED AND ACCEPTED ON THIS 11th DAY OF ~~DECEMBER~~, February, 2026  
2025:

MIDWEST GENERATION, LLC



\_\_\_\_\_

Name: Bradley Kranz

Title: President

## Attachment 2 – Analysis and Narrative Discussion

## Attachment 2 – Analysis and Narrative Discussion

Pursuant to 40 CFR §423.19(g)(1), Midwest Generation, LLC (“MWG”) submitted a Notice of Planned Participation (“NOPP”) for Powerton Generating Station Unit 5 and Unit 6 (“Units”) on October 13, 2021, stating that the Units would permanently cease coal combustion and retire no later than December 31, 2028. In accordance with 40 CFR §423.19(g)(3), MWG has filed NOPP Annual Progress Reports reaffirming plans to permanently cease coal combustion and retire the units.

In December 2025, PJM completed the base residual auction (“auction”) for the 2027/2028 delivery year. The PJM delivery year runs from June 1 through May 31 of the following year. Results of the 2027/2028 auction showed that PJM is below its required Installed Reserve Margin target of 20%.<sup>1</sup> Accordingly, due to these facts and pursuant to PJM’s authority, on December 23, 2025, PJM requested MWG’s cooperation to help prevent and mitigate the unusual system conditions that impair the reliability of the PJM Region and proposed an Agreement to MWG to avoid deactivation of the Units by December 31, 2028 (the “Agreement”). *See* Attachment 1.

Before signing the Agreement, MWG reached out to the permitting authority, Illinois Environmental Protection Agency (“Illinois EPA”), to concur that the Agreement would be a qualifying event as described in 40 CFR §423.18(a)(3). On February 10, 2026, Illinois EPA concurred that the Agreement was consistent with 40 C.F.R. 423.18(a)(3) and its overall purpose “to allow an EGU to operate for reliability purposes without violating its CWA permit.” *See* Attachment 3.

On February 11, 2026, MWG signed the Agreement with PJM. *See* Attachment 1.

Additionally, PJM’s Chair of the Board of Managers and Interim President and CEO, David E. Mills, sent a letter to Illinois Governor Pritzker and former New Jersey Governor Phil Murphy<sup>2</sup> restating PJM’s concern about retirements of current generating resources in its concluding sentences:

“Losing existing supply in the near term will exacerbate both the reliability and affordability challenges. As such, existing reliability safety valve measures built into your statutory/regulatory frameworks should be invoked to delay these retirements.”

*See* Attachment 4.

In accordance with 40 CFR §423.18(a), the Units remain in the category and qualify as units permanently ceasing combustion of coal by December 31, 2028. Absent the agreement, MWG would have filed retirement notices with PJM the Units by February 15, 2026, removing 1,538 MW of installed capacity from service.<sup>3</sup>

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<sup>1</sup> PJM’s 2027/2028 Base Residual Auction Report, December 17, 2025 found at [pjm.com](https://www.pjm.com).

<sup>2</sup> Mr. Murphy’s tenure as Governor of New Jersey ceased on January 20, 2026.

<sup>3</sup> MWG complies with 35 IAC Part 217 Subpart V by emissions averaging across its operating fleet. Retirement of Powerton will cause retirement of peaking EGUs at Fisk Station and Waukegan Station, an additional 272 MW of installed capacity.

Attachment 3 – February 10, 2026 Illinois EPA Concurrence

**From:** Armstrong, Andrew <Andrew.Armstrong@Illinois.gov>  
**Sent:** Tuesday, February 10, 2026 4:28 PM  
**To:** Stone, Walter; Shealey, Sharene  
**Subject:** 40 C.F.R. 423.18(a)(3)  
**Attachments:** 2025.12.23 - PJM letter to MWG re Powerton - Bryson.pdf

Some people who received this message don't often get email from andrew.armstrong@illinois.gov. [Learn why this is important](#)

**CAUTION:** This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Dear Mr. Stone and Ms. Shealey:

You have contacted Illinois EPA concerning the attached letter from PJM to Midwest Generation, LLC (“MWG”), dated December 23, 2025. In this letter, PJM “requests MWG’s cooperation in formulating and implementing a plan to help prevent and mitigate . . . unusual system conditions that impair the reliability of the PJM Region,” more specifically requesting that MWG “take all necessary steps consistent with 40 C.F.R. § 423.18(a)(3), to avoid deactivation of the Powerton Generating Station by December 31, 2028 . . . .” (page 3). PJM further requests that NRG sign the letter and return it to PJM to signify that PJM’s “proposed plan” is “agreeable” to NRG (*id.*). In support of these requests, PJM cites to its authority under its Tariff “to direct or coordinate corrective action, whether or not specified in the PJM Manuals, as necessary to alleviate unusual conditions that threaten the integrity or reliability of the PJM Region, or the regional power system” (page 2).

You have requested Illinois EPA’s concurrence that, if executed, this letter agreement could constitute a “qualifying event” under 40 C.F.R. 423.18(a)(3). This paragraph provides, in pertinent part, as follows:

- (a) An electric generating unit shall qualify as . . . permanently ceasing the combustion of coal by December 31, 2028, . . . if such qualification would have been demonstrated absent the following qualifying event:

\* \* \*

- (3) Any other reliability-related order, energy emergency alert, or agreement issued by a competent electricity regulator (*e.g.*, an independent system operator) which results in that electric generating unit operating in a way not contemplated when the certification was made . . . .

Illinois EPA has reviewed PJM’s letter, 40 C.F.R. Part 423, and USEPA rulemaking materials associated with the regulations. Based on this review, Illinois EPA concurs that, if executed, this letter agreement could constitute a reliability-related agreement issued by PJM, consistent with 40 C.F.R. 423.18(a)(3) and its overall purpose “to allow an EGU to operate for reliability purposes without violating its CWA permit.” <https://www.federalregister.gov/d/2024-09185/p-958>

Please note that this concurrence is limited only to Illinois EPA’s interpretation of 40 C.F.R. 423.18(a)(3). Illinois EPA is not by this concurrence expressing any opinion on the contents of PJM’s letter. This

concurrency is contingent upon MWG meeting all other requirements of Part 423, including timely and complete submission of the related certification required by 40 C.F.R. 423.19(i). This concurrence does not in any way address any other requirements applicable to the Powerton generating station, including the Illinois Climate and Equitable Jobs Act, or any requirements related to the Fisk and Waukegan generating stations. Further, this concurrence concerns only this individual letter agreement, not any additional actions that PJM or another electricity regulator might take relative to the Powerton generating station.

If you have any questions, please feel free to contact me.



**Andrew Armstrong**  
Chief Legal Counsel  
217-836-3369  
[andrew.armstrong@illinois.gov](mailto:andrew.armstrong@illinois.gov)

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PJM Interconnection, L.L.C.  
2750 Monroe Boulevard  
Audubon, PA 19403-2497

Michael Bryson  
Senior Vice President, Operations  
[Michael.Bryson@pjm.com](mailto:Michael.Bryson@pjm.com)  
(610) 666-4659

December 23, 2025

Midwest Generation, LLC  
Attn. Bradley Kranz  
Powerton Generating Station  
13082 E. Manito Road  
Pekin, IL 60087

Re: Powerton Generating Station

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PJM further understands from MWG that if Powerton Units 5 and 6 were to permanently cease operation, 271.5 MW (ICAP) of additional generation resources from the Fisk and Waukegan generation facilities, located in Chicago, Illinois and Waukegan, Illinois, respectively would also permanently deactivate.

As your company is aware, the President and the Secretary of Energy have declared that an “emergency” exists that poses a threat to the reliability and the ability to serve load, including emergent data centers needed to help fuel the United States’s advancements in artificial intelligence (“AI”), due to a projected shortage of electric energy and a shortage of facilities for the generation of electric energy.<sup>1</sup> This energy emergency threatens national security and has put pressure on consumers.<sup>2</sup> The Executive Branch has made it national policy to “utilize all

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<sup>1</sup> See, e.g., DOE Order 202-25-4, Emergency Order (May 30, 2025), <https://www.energy.gov/sites/default/files/2025-05/Federal%20Power%20Act%20Section%20202%28c%29%20PJM%20Interconnection.pdf>; DOE Order 202-25-8, Emergency Order (Aug. 28, 2025), <https://www.energy.gov/sites/default/files/2025-08/202c%20Order%20No.%20202-25-8.pdf>. supply and infrastructure causes and makes worse the high energy prices that devastate Americans, particularly

<sup>2</sup> Exec. Order No. 14156, 90 Fed. Reg. 8433 (Jan. 29, 2025) (“EO 14156”) (discussing the national security interest in “a reliable, diversified, and affordable supply of energy” and stating that “our Nation’s inadequate energy those living on low- and fixed-incomes.”). See also Exec. Order No. 14262, 90 Fed. Reg. 15521 (Apr. 14, 2025) (“EO 14262”) (“The United States is experiencing an unprecedented surge in electricity demand driven by rapid technological advancements, including the expansion of artificial intelligence data centers and an increase in domestic manufacturing. This increase in demand, coupled with existing capacity challenges, places a significant strain on our Nation's electric grid. Lack of reliability in the electric grid puts the national and economic security of the American people at risk. The United States’ ability to remain at the forefront of technological innovation

available power generation resources . . . ”<sup>3</sup> to preserve the reliability of the bulk electric power system. Executive Order No. 14262 provides that the Secretary of Energy shall “prevent” consistent with applicable law “an identified generation resource in excess of 50 megawatts of nameplate capacity from leaving the bulk-power system.”<sup>4</sup>

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As a PJM Member, MWG has committed to cooperate in the coordinated planning and operation of the facilities within the PJM Region so as to obtain the greatest practicable degree of reliability, compatible economy and other advantages from such coordinated planning and operation in a manner consistent with PJM governing documents.<sup>6</sup>

MWG has also agreed to “[c]ooperate with the other Members and the Office of the Interconnection in the analysis, formulation and implementation of plans to prevent or eliminate conditions that impair the reliability of the PJM Region[.]”<sup>7</sup>

“Consistent with Good Utility Practice, [PJM] shall be authorized to direct or coordinate corrective action, whether or not specified in the PJM Manuals, as necessary to alleviate unusual conditions that threaten the integrity or reliability of the PJM Region, or the regional power system.”<sup>8</sup>

The Department of Energy has found that unusual conditions exist in the PJM Region that threaten the integrity or reliability of the PJM Region. Furthermore, the 2027/2028 Base

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<sup>7</sup> *Id.* at section 11.3.2(g); see also section 11.3.2(b).

<sup>8</sup> Tariff, Attachment K-Appendix, section 1.7.15; see also Operating Agreement, section 11.3.4.

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As a Regional Transmission Organization and independent system operator, PJM Interconnection, L.L.C. ("PJM") fits within the meaning of a "competent electricity regulator" as that term is used in 40 C.F.R. § 423.18(a)(3). PJM understands that if MWG is willing to continue operating the Powerton Generating Station beyond December 31, 2028, the facility would be operating in a way not contemplated when Powerton Generating Station made its NOPP certification.

Please have a duly authorized officer of MWG respond as soon as possible to this letter to signify whether PJM's proposed plan is agreeable to support system reliability in the PJM Region.

Regards,

/s/Michael E. Bryson

Michael E. Bryson  
Senior Vice President, Operations  
PJM Interconnection, L.L.C.

*On behalf of PJM Interconnection, L.L.C.*

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<sup>9</sup> 40 CFR § 423.18 (a)(3) states:

All permits subject to this part shall include the following permit conditions:

- (a) An electric generating unit shall qualify as a low utilization electric generating unit, permanently ceasing the combustion of coal by December 31, 2028, or permanently ceasing the combustion of coal by December 31, 2034, if such qualification would have been demonstrated absent the following qualifying event:

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(3) Any other reliability-related order, energy emergency alert, or agreement issued by a competent electricity regulator (*e.g.*, an independent system operator) which results in that electric generating unit operating in a way not contemplated when the certification was made; or

PROPOSED PLAN AGREED AND ACCEPTED ON THIS \_\_\_\_\_ DAY OF DECEMBER,  
2025:

MIDWEST GENERATION, LLC

\_\_\_\_\_  
Name: Bradley Kranz

Title: President

Attachment 4 – February 17, 2026 PJM Letter



David Mills  
Interim President & CEO

PJM Interconnection  
2750 Monroe Blvd.  
Audubon, PA 19403

February 17, 2026

**Honorable JB Pritzker**

Office of the Governor  
401 S. Spring St.  
Springfield, IL 62704

**Honorable Phil Murphy**

New Jersey State House  
P.O. Box 001  
Trenton, NJ 08625

Dear Gov. Pritzker and former Gov. Murphy,

Thank you for your joint letter and for your continued engagement on issues central to PJM. We appreciate the concern that you have expressed for the consumers in your state. PJM is a mission-driven organization serving 67 million consumers, and thus, we share your concern.

We also appreciate your acknowledgement that supply/demand fundamentals are causing the affordability challenge for your consumers. We understand the difficult position that governors in our footprint face in both inviting data center growth for their economic development benefits, while simultaneously contending with electricity price increases that result from the data centers' demand for electricity. While we do not recall receiving a correspondence from your administration stating that "ratepayers must not shoulder the burden caused by new large load users," your intention is now clear based upon your endorsement of the principles advanced by the Trump Administration (Principles) and the other governors in our footprint.

As the Principles recognize, if the policy of the federal government and our states is to allow for the rapid interconnection of data centers, the only solution to both maintain grid reliability and tame high pricing is to bring substantial new supply to the system. The PJM Board of Managers (Board) recently published its decision in its Critical Issue Fast Path (CIFP) stakeholder process for large load additions, calling for the immediate initiation of a procurement process to meet supply shortages identified through PJM capacity auctions. PJM's decision went further in its consumer protection than the proposal brought by New Jersey itself (along with Pennsylvania, Maryland and Virginia) by initiating a "connect and manage" framework where PJM will seek to have data centers move to their backup generators prior to needing to shed residential load.

The states will be a critical part of the discussion going forward on cost allocation, curtailment responsibility, and on the backstop mechanism itself. If the backstop is to be successful, supply resources that are identified through the backstop will need to ultimately be sited, permitted and constructed, as will the transmission improvements allowing for those resources to be interconnected. This is firmly in the states' hands. As the Principles further recognize, PJM does not control cost allocation to retail customer classes. PJM does not, for instance, have the authority to say what share of wholesale costs that residential, industrial and other customer classes will pay. This is within the authority of the states, and the Principles, specifically the final principle, acknowledge this jurisdictional reality.

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As to the generation interconnection queue, that process is fully transformed and open to new projects. Any project that enters the queue today will be electrically studied and will receive its agreement to interconnect in a one- to two-year time frame. Furthermore, approximately 57 GW worth of projects currently have their agreements and have no further study obligations with PJM. We have attached a state-by-state breakdown of these projects to this letter. As these projects are our most viable path to obtaining new supply, we encourage you to work with the developers of these projects to determine their needs to support their construction.

Finally, as we acknowledge that we are currently experiencing a supply/demand imbalance that is leading to affordability challenges, we must express our concern about any state mandate that serves to disadvantage or inefficiently restrict existing supply resources. Losing existing supply in the near term will exacerbate both the reliability and affordability challenges. As such, existing reliability safety valve measures built into your statutory/regulatory frameworks should be invoked to delay these retirements.

Thank you again for your correspondence.

Sincerely,

David E. Mills  
Chair, PJM Board of Managers  
Interim President & CEO

### Projects Through Generation Interconnection Queue By State

The below represents generation projects that have a fully executed Generation Interconnection Agreements (GIAs) and are in a construction status designation (In Service Partial, Under Construction, Suspended, or Engineering/Procurement). Approximately 9 GW of projects have their GIAs but have not yet entered one of these construction status designations.

State	# of Projects	MW Energy
Delaware	11	419
Illinois	30	3,868
Indiana	49	7,468
Kentucky	18	1,882
Maryland	21	1,739
Michigan	8	1,035
North Carolina	16	1,476
New Jersey*	29	2,639
Ohio	84	9,444
Pennsylvania	91	3,407
Virginia	98	12,189
West Virginia	15	2,831
<b>Total</b>	<b>470</b>	<b>48,397</b>

\*Included in the NJ statistics are Orsted's two offshore wind ISA projects totaling 1,248 MW