

HOUSE ENVIRONMENT AND TRANSPORTATION COMMITTEE

Delegate Marc Korman, Chair
Delegate Michele Guyton, Vice Chair

January 29, 2026

1:00 PM

House Office Building, Room 250

Maryland's Energy Landscape – Part 5

AGENDA

- I. Introductory Remarks
- II. PJM Interconnection, LLC
 - Jason Stanek, Executive Director
 - Stuart Widom, Sr. Regulatory & Legislative Manager
- III. Questions
- IV. Concluding Remarks



PJM Interconnection, LLC Legislative Briefing

Jason Stanek, Executive Director
Stuart Widom, Sr. Legislative Manager

Maryland House of Delegates
Environment & Transportation Committee

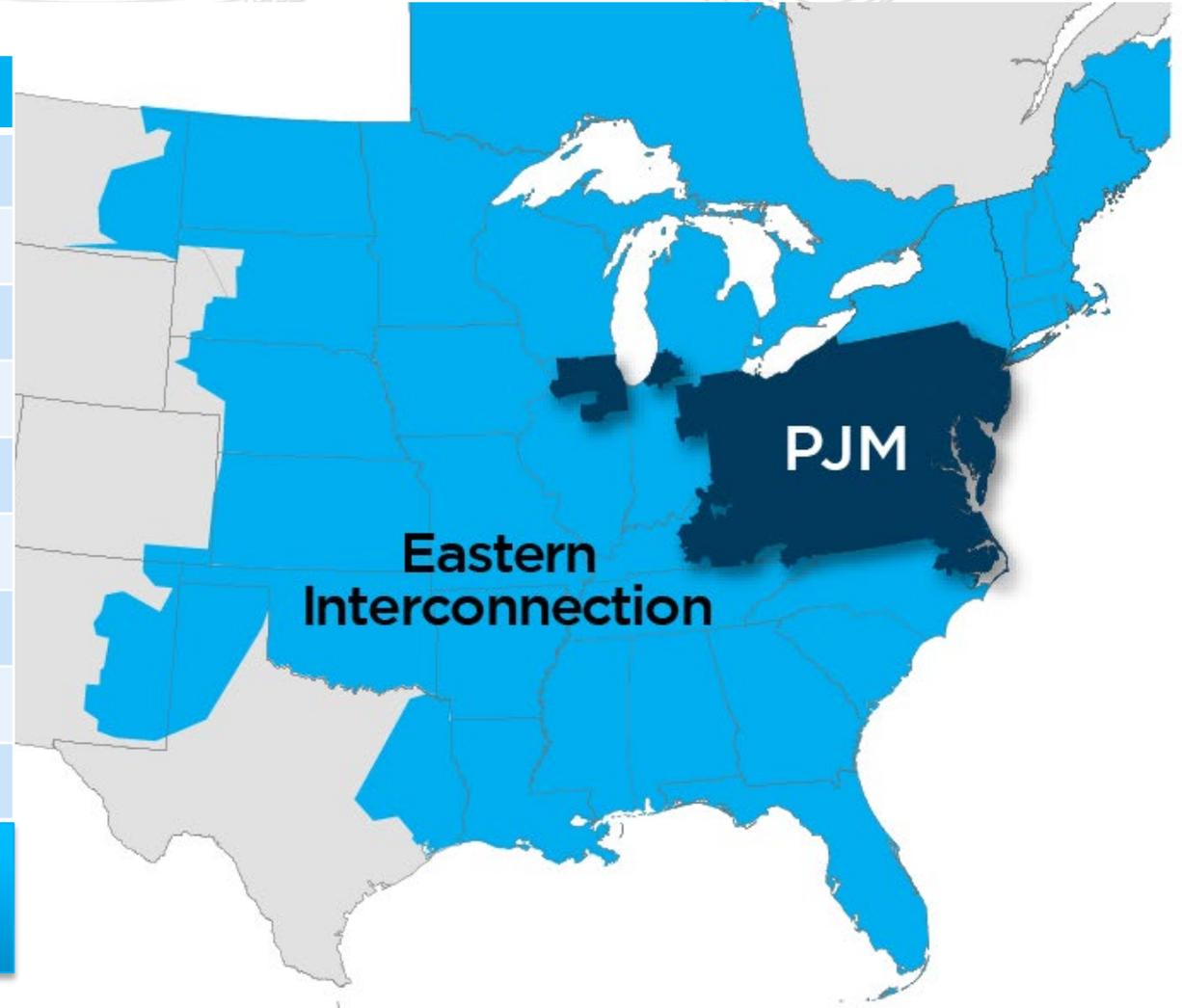
January 29, 2026



Key Statistics

Member companies	1,110
Millions of people served	67+
Peak load in megawatts	165,563
Megawatts of generating capacity	182,036
Miles of transmission lines (BES)	88,333
Gigawatt hours of annual energy	800,004
Generation sources	1,486
Square miles of territory	369,054
States served	13 + DC

- 27% of generation in Eastern Interconnection
- 24% of load in Eastern Interconnection



As of February 2025

Operates As A Non-Profit

No Shareholders or Share Price

Federally Regulated (FERC)

Independent Board

Market Monitor

Mission-Driven

PLANNING



Planning for the future like...



OPERATIONS



Matches supply with demand like...

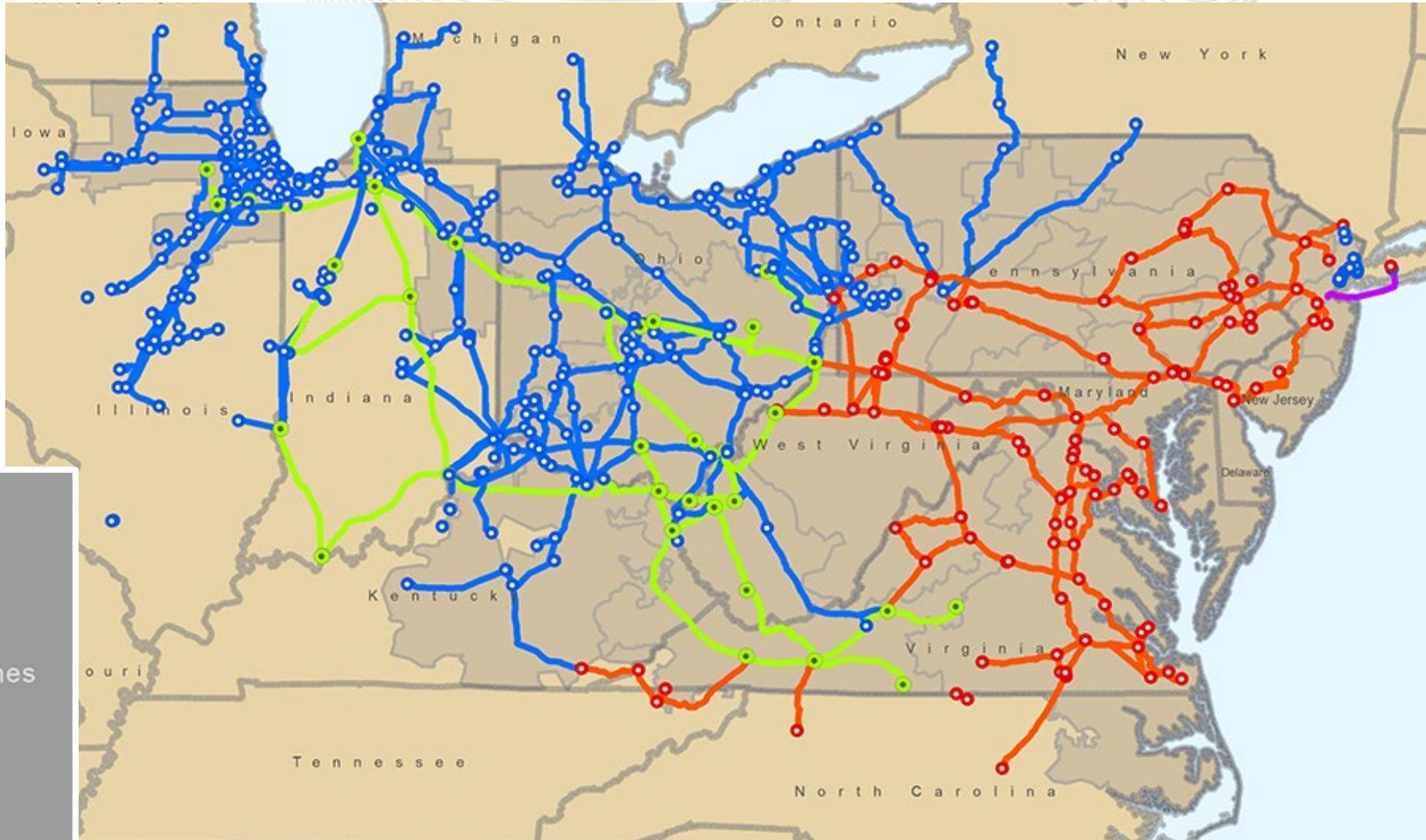


MARKETS



Energy Market Pricing like...





Legend

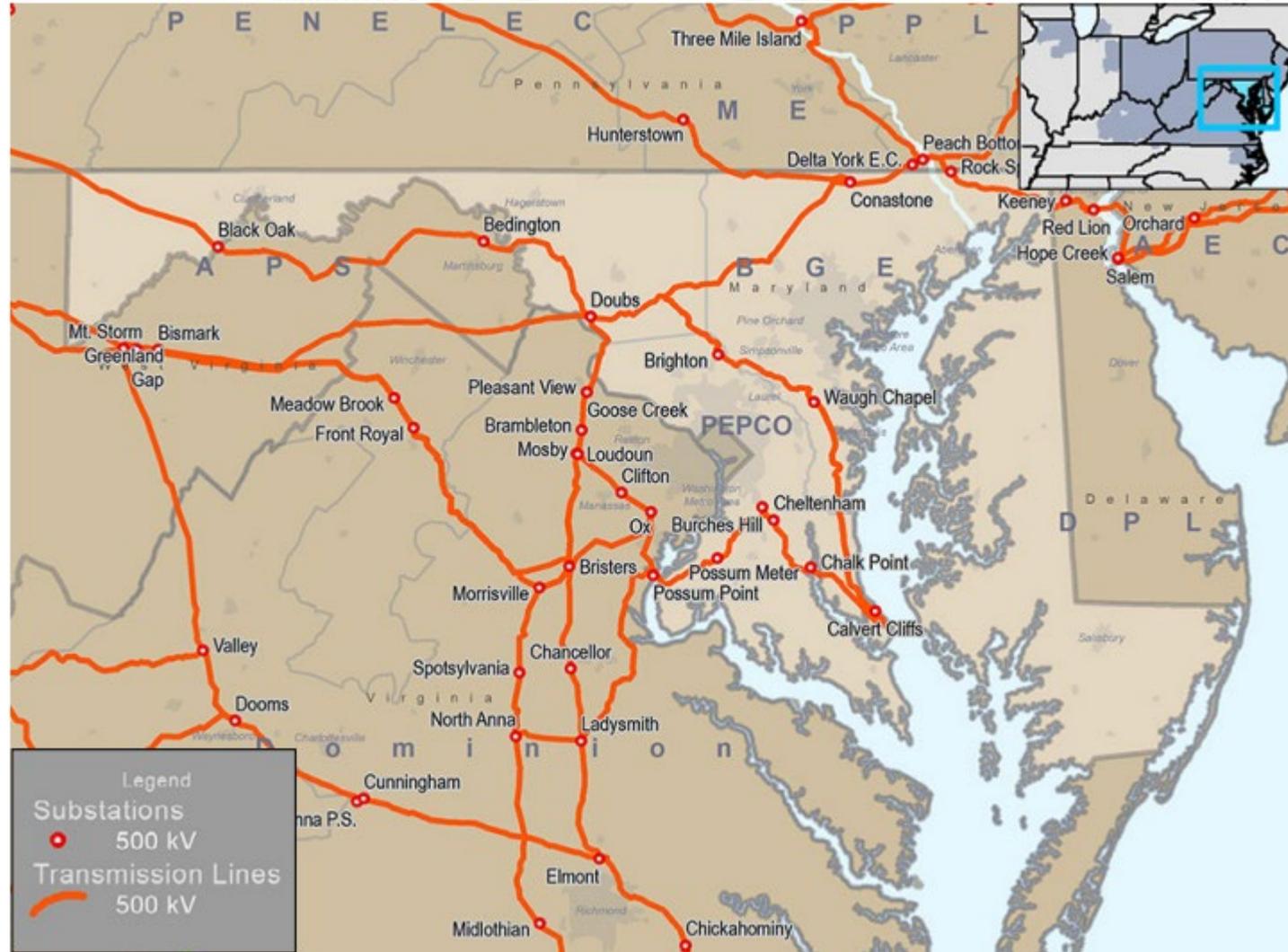
Substations

- 765 kV
- 500 kV
- 345 kV

Transmission Lines

- HVDC
- 765 kV
- 500 kV
- 345 kV

PJM Service Area in Maryland/District of Columbia



~\$5 billion
annual savings
produced

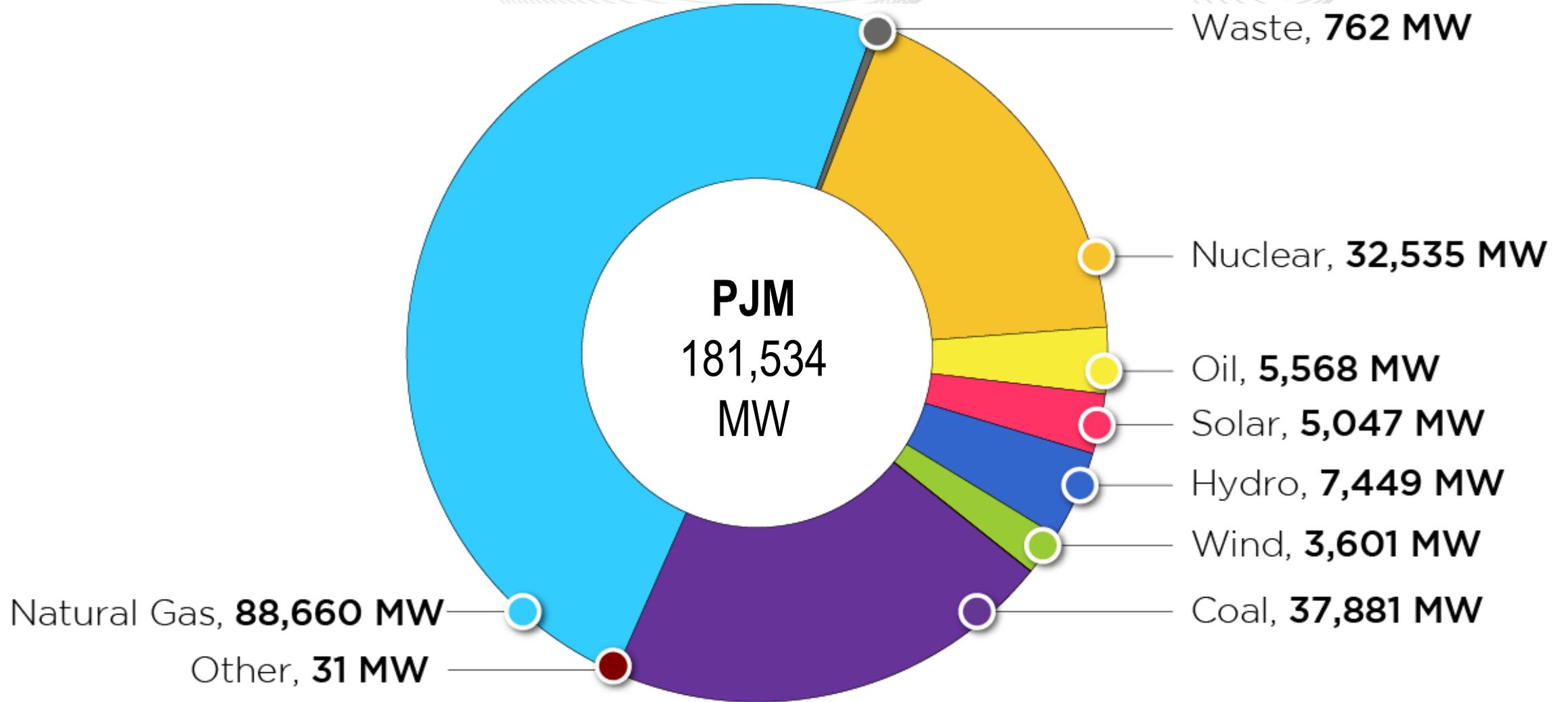


- \$1.4 billion**
Reliability
- \$1.25 billion**
Generation Investment
- \$1.1 billion**
Integration of More Efficient Resources
- \$990 million**
Energy Production Costs
- \$265-\$355 million/year**
Demand Response Value

— All numbers are estimates. —

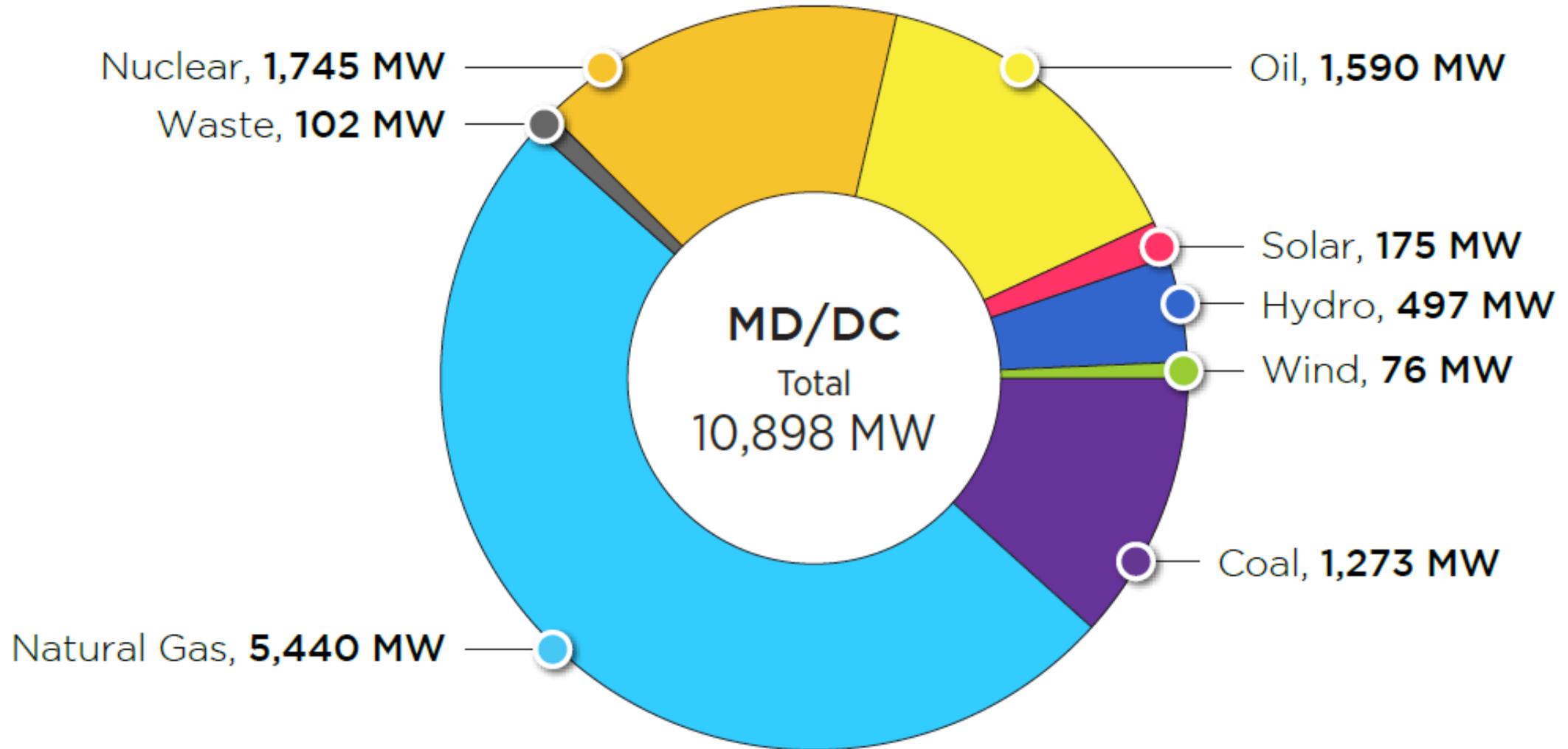
PJM Existing Installed Capacity Mix

(CIRs – as of Dec. 31, 2024)

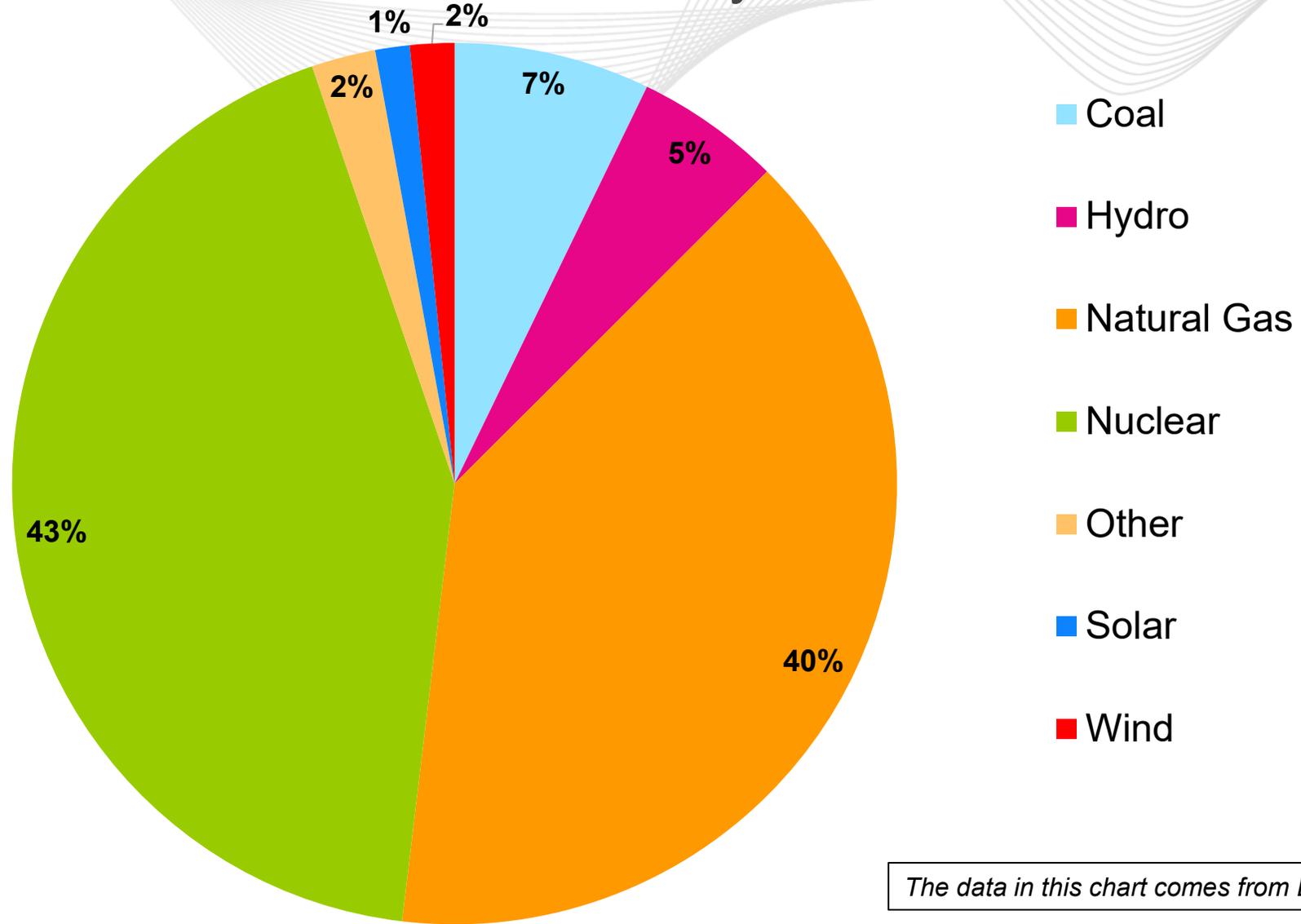


MD/DC – Existing Installed Capacity (MW) by Fuel Type

(CIRs- as of Dec. 31, 2024)

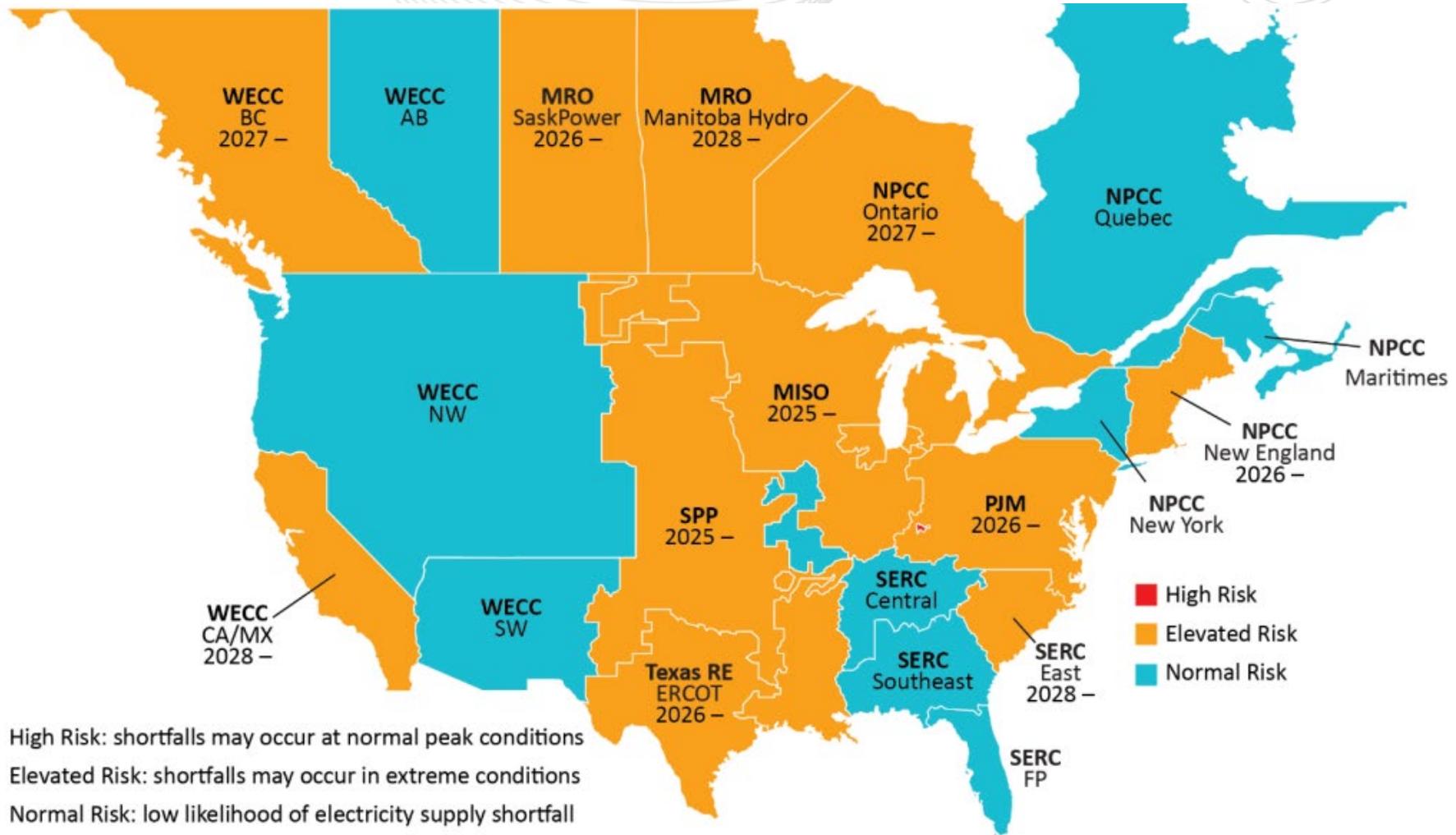


Maryland – Generator Production



The data in this chart comes from EIA Form 923 (2024).

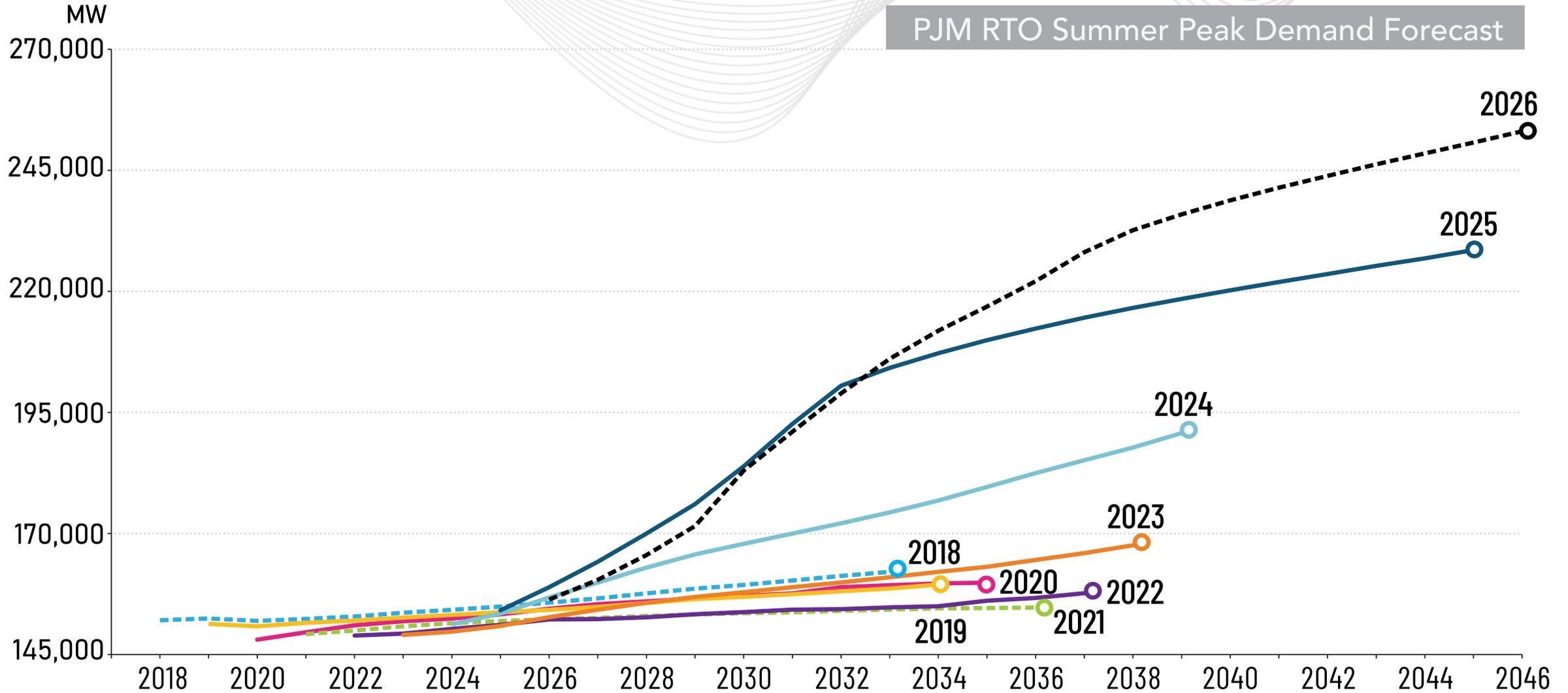
NERC's Long-Term Reliability Assessment: Elevated Risk for PJM and Its Neighbors





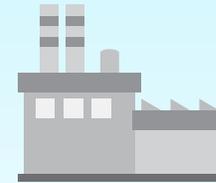
Electricity Demand Growth

PJM RTO Summer Peak Demand Forecast

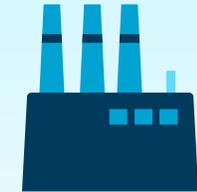




Generation Retirements & Additions Since 2018



-6,000 MW



+1,600 MW

Takeaway: Maryland, already an importer of power, has seen the retirement of 6,000 MW of resources since 2018 and the addition of only 1,600 MW of resources during that time frame.



Ratings by Generator Fuel Type

	2027/2028 BRA ELCC Class Ratings
Onshore Wind	41%
Offshore Wind	67%
Fixed-Tilt Solar	7%
Tracking Solar	8%
Landfill Intermittent	48%
Hydro Intermittent	39%
4-hr Storage	58%
6-hr Storage	67%
8-hr Storage	70%
10-hr Storage	78%
Demand Resource	92%
Nuclear	95%
Coal	83%
Gas Combined Cycle	74%
Gas Combustion Turbine	61%
Gas Combustion Turbine Dual Fuel	77%
Diesel Utility	92%
Steam	72%
Waste to Energy Steam	83%
Oil-Fired Combustion Turbine	80%

PJM’s Generation Interconnection Queue



Queue Not Closed: 1-2 Year Turnaround Time to be Studied



Google AI to Further Expedite



Creation of On-Ramps to Go Quicker
(CIR Transfer, Surplus, RRI, EIT)



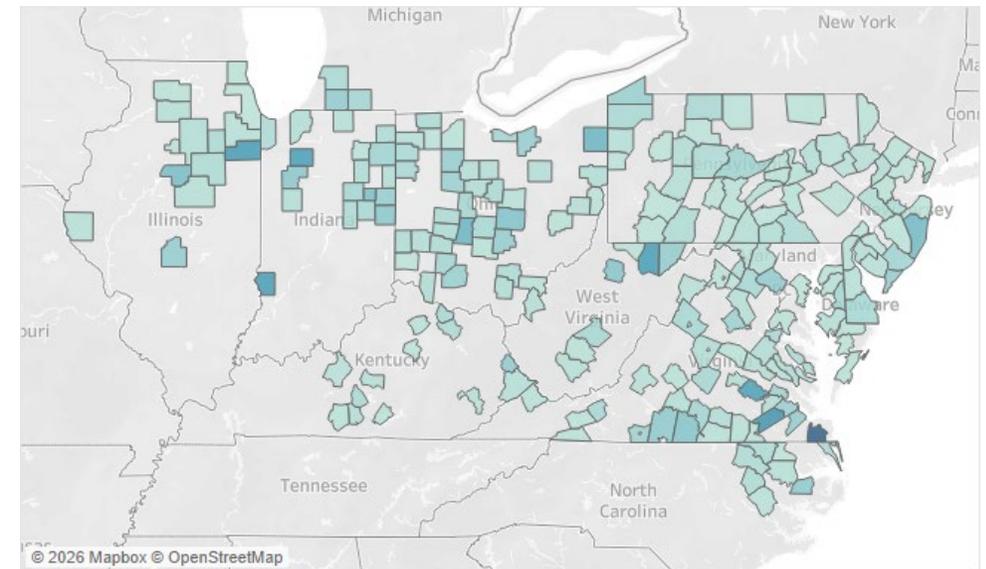
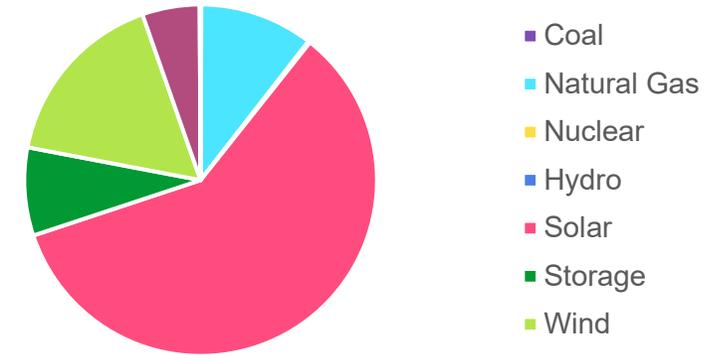
~57 GW Have Agreements



PJM has shifted from queue reform to delivery with faster study timelines, new on-ramps, and significant new supply already approved or connected.

Fuel	Projects	GW
Coal	1	0.1
Natural gas	16	5.8
Nuclear	1	0.1
Hydro	1	0.1
Solar	367	33.1
Storage	60	4.6
Wind	36	9.4
Hybrid	31	3.0
Other	1	0.1
Total	514	56.3

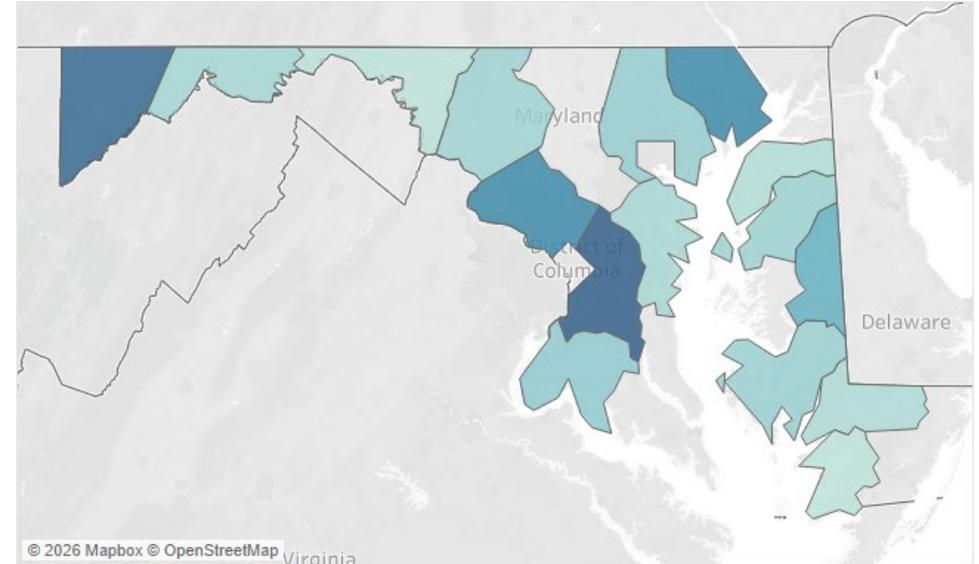
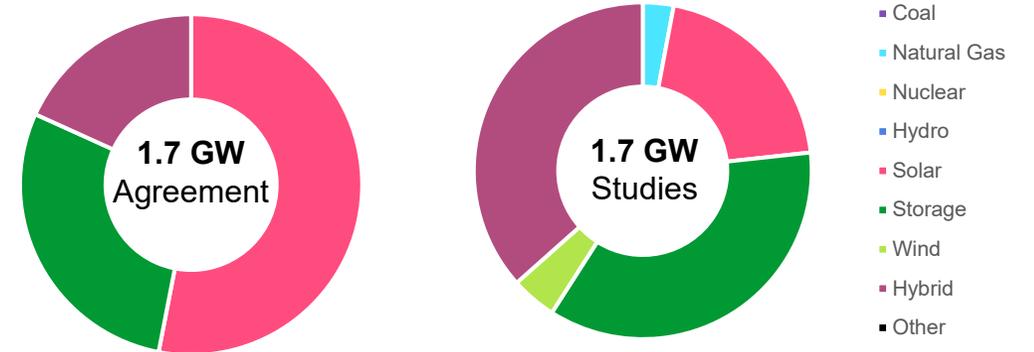
GW Breakdown by Fuel



Project Count

Fuel	Agreements	Studies
Coal		
Natural gas		1
Nuclear		
Hydro		
Solar	16	4
Storage	1	3
Wind		1
Hybrid	4	1
Other		
Total	21	10

MW Breakdown





Bring Your Own New Generation and Expedited Interconnection Track



Curtailment of Data Centers Not Bringing New Generation



Reliability Backstop Procurement



Significant Load Forecasting Improvements



Study on Market Incentives for New Supply



Feedback Requested re: Price Cap and Floor

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OPINION

State frameworks are critical to addressing PJM affordability

Affordability concerns have risen in the PJM sphere due to "tightening supply and demand," writes Senior Vice President Asim Haque.

Published Oct. 2, 2025

By Asim Haque



The PJM Interconnection control room. Permission granted by PJM Interconnection

Asim Z. Haque is senior vice president of governmental and member services for PJM Interconnection.

The U.S. energy landscape is undergoing major transformation as the power sector works to meet the increasing electricity demands of artificial intelligence and the digital economy.

PJM Recommendations

Retail Cost Allocation – States ultimately have control over how costs are allocated to the various customer classes in utility tariffs. Costs can be allocated away from residential consumers and small businesses and toward other customer classes more directly driving the tightening supply-demand balance, including data centers. State programmatic rebates can be allocated to specific customer classes as well.

Data Center Entry Commitments – A number of our states are placing financial requirements and stricter entry commitments on data centers trying to connect through regulated utilities as a way to make sure that the data center is actually coming to that utility's service territory. This will, in turn, allow for utilities to submit more accurate data to PJM to better refine our load forecasts used on the wholesale side. Further, PJM is considering a period where states can review and provide feedback on requested large load additions in PJM's load forecast.

Default Service Procurement – Our restructured states are all utilizing default service procurement mechanisms to procure supply for consumers who are not shopping with a competitive retail supplier. It is worthwhile to analyze whether these procurement mechanisms are designed for a high-priced wholesale environment. In those states with especially low shopping statistics, consumers are deeply exposed to this high-capacity market price if default service procurement mechanisms are not designed to long-term hedge against that price.

Retail Shopping – Competitive suppliers may be able to offer better rates than what is being procured in default service auctions. This may be an opportunity for competitive suppliers, residential/small business consumers and state regulators to work collectively to enhance shopping while maintaining traditional consumer-protection oversight.

State Programs and the Total Bill – Knowing that the wholesale price for power will be higher in future years, the total bill can be analyzed to determine whether existing state programs that were initiated during times of lower wholesale pricing should continue, and again, if rebates should be allocated away from or to certain customer classes.

Demand Response and Energy Efficiency – Paying customers to reduce usage during system stress is a direct solution to reducing peak electricity demand. States can play a central role in developing and promoting robust demand response and energy efficiency programs.

Siting/Permitting – We need more energy infrastructure, both generation and transmission. States play a pivotal role in projects ultimately getting built through their siting/permitting processes. If energy infrastructure projects don't receive state permitting approvals, it won't matter how many projects PJM pushes through its generation interconnection queue.

- **States should avoid policies intended to push *existing generation resources* off the system until an adequate quantity of replacement generation is online and has been shown to be operating**
- **States should help to bring *new generation resources* onto the system as soon as possible**
- **States should address state and local challenges in the siting & permitting of all electricity infrastructure including *transmission infrastructure*.**
- **Consider consumer *cost increases* as a natural byproduct of policies that exacerbate the supply/demand imbalance.**