



David Mills  
Interim President & CEO

PJM Interconnection  
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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.

February 17, 2026

Page 2

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.

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