

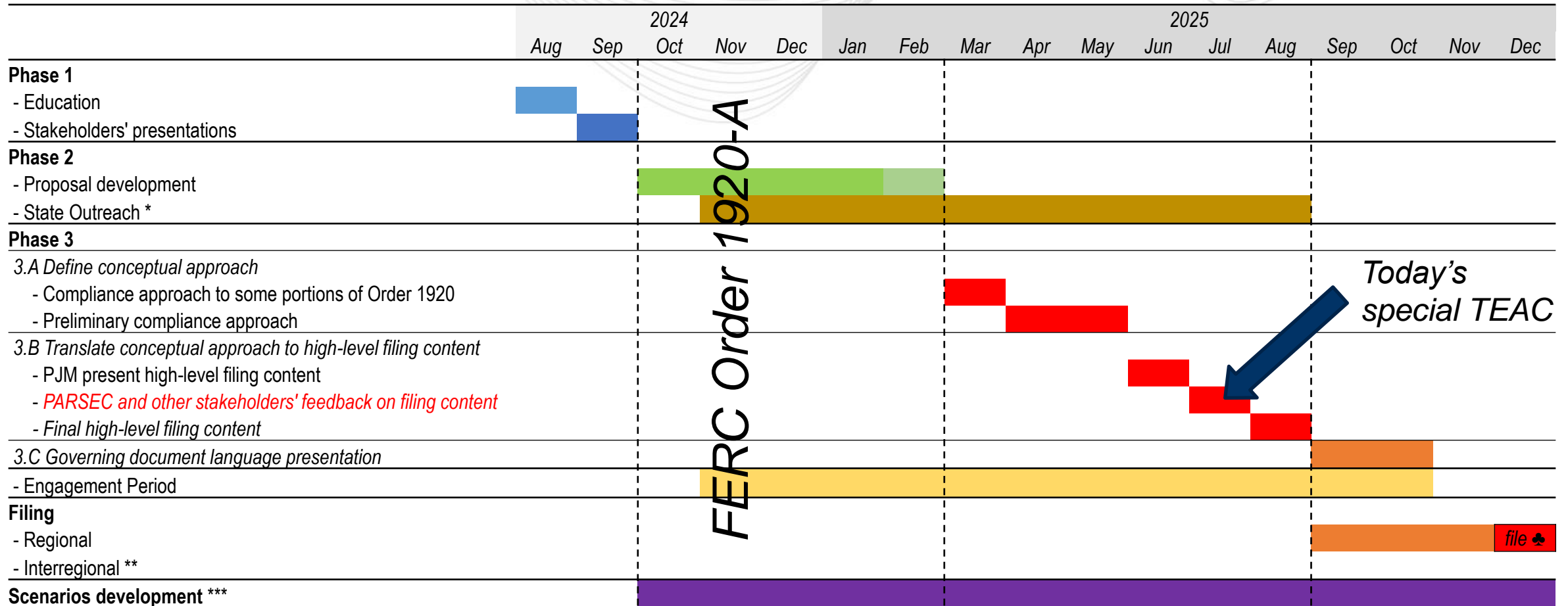
Order 1920 Stakeholder Engagement Update

Emmanuele Bobbio
Principal Economist

TEAC special session – Order 1920
July 18, 2025

- In March 13, April 10, and May 9 special TEACs, PJM presented the conceptual approach to comply with Order 1920 regional requirements, and assumptions and methods for an informational Base Scenario
- On June 27 PJM presented the “compliance tracker” which translates the conceptual compliance into high-level language corresponding to each of Order 1920’s regional requirements
- July 18 (today):
 - Stakeholder provide feedback on the compliance tracker
 - Vistra
 - RMI
 - Update on capacity expansion assumptions for the information Base Scenario to reflect latest changes (e.g. Big Beautiful Bill)

Order 1920 Stakeholder Engagement Timeline



* State Outreach Topics: 1) process and logistics 2) governance 3) evaluation process and selection criteria 4) voluntary funding 5) counterfactual for cost allocation

** On 5/23/2025 FERC granted PJM's request to extend the interregional filing deadlines for the protocols with MISO and SERTP to 12/12/2026 and for those with NY-ISO and ISO-NE to 6/14/2027

♣ 6-month extension moves filing deadline to 12 December 2025; implementation deadline remains 12 June 2027 as required by Order No. 1920-A

- **Whitepaper:**
 - PJM will endeavor to publish in July the whitepaper addressing the feedback stakeholders provided in May
- **August 7 special TEAC:**
 - PJM considerations on stakeholder feedback
 - Informational Base Scenario development update

Presenter:

Emmanuele Bobbio

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Member Hotline

(610) 666-8980

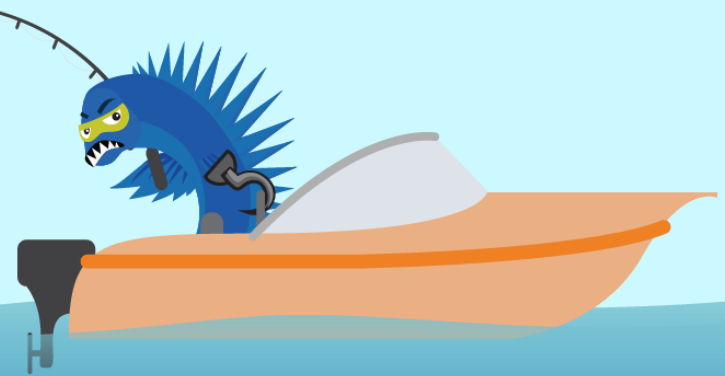
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