IPA Integrated Resource Planning Workshop #1: Scenarios

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Question 1

Do the proposed scenarios reflect a reasonable range of the most impactful and most uncertain drivers? If not, what key drivers or assumptions should be added, removed, or modified?

The scenarios all assume a smooth demand trajectory and do not consider significant discontinuities, abrupt changes to the demand trajectory such that it is not smooth or continuous, that characterize real-world behavior and scenarios. The most impactful driver is likely to be a significant discontinuity—such as a breakthrough in data center efficiency, a collapse in data center demand, or, conversely, surging demand and load growth combined with early retirements.

Another driver to consider is the availability or lack of availability of "Imported Capacity" and energy from neighboring grids. To ensure a reliable plan for Illinois, the base case should assume zero imported capacity and energy, with any positive availability as a sensitivity rather than a baseline assumption.

Another impactful driver to consider is the availability and cost of non-carbon emitting gas to fuel incremental combustion turbines advanced as solutions to capacity shortfalls. What specific fuels are contemplated, and does Illinois policy support their development as a firm fuel source? The study should recognize and stress test the cumulative demand for incremental, firm sources of fuel to support accredited capacity additions.

Question 2

Are there additional scenarios that should be considered to better capture plausible future outcomes? If so, which of the current proposed scenarios would you remove? If so, which of the current proposed scenarios would you remove?

The scenarios seem to lack a realistic treatment of uncertainty.

While mandated electrification is not currently under consideration, it represents a key sensitivity, especially as it relates to potential shifts in the seasonal capacity peak from summer to winter. The planning criteria should include a scenario in which the winter peak surpasses the summer peak in the planning criteria. Electrification assumptions related to home heating should appropriately use efficiencies based on peak winter hour temperature conditions.

Question 3

What data sources, studies, or inputs should be used to inform key scenario parameters?

The Agencies should review historical demand forecasts against actual demand to identify the types and magnitudes of discontinuities, observed historically as a way to inform one or more scenarios that incorporate future demand growth rate discontinuities.

The agencies should consider the full development timeline and installed cost for nuclear alternatives based on real projects recently completed in the United States, rather than theoretical logic for faster timelines.

The agencies should utilize actual installed costs for wind, solar and battery projects installed within the past three to five years, plus inflation, rather than presuming scale and technology-based cost reductions.

When converting installed capacity to annual generation, the agency should consider frequency and duration of intermittency events as well as availability of excess generation to recharge batteries.

Review PJM's current projections for winter as well as summer load growth assumptions and recognize how the winter scenarios are managed from a capacity perspective as well as summer.

Question 4

Do these load scenarios capture a reasonable range of the most impactful drivers? If not, what specific drivers of load are missing?

Yes, except for the assumption of smooth load growth, as discussed above, which ignores the high probability of significant discontinuities and renders the scenarios less meaningful.

While the IRP's mission notes the importance of cost in the scenarios, the analysis should include a clear base case that establishes the least cost alternative (to the customer), along with its associated carbon footprint. Subsequent cases can then be measured against this base case from both a cost and emissions benefit perspective.

Question 5

For this study, sensitivities are defined as changes to a single input or assumption within a given scenario. Please suggest 1-3 sensitivities that you believe are particularly valuable to test. For each sensitivity include:

-Which input should be varied (resource cost, interconnection timelines, etc.)

-What scenario the sensitivity should be applied to

The following input(s) should be varied: (1) Demand growth rate, relative rates of peak demand and sales growth to capture changes in load shapes and potential shift to winter peak; (2) Cost inputs should be looked at in two ways: Inclusive of state and federal subsidies (tax credits, grants, etc) as well as exclusive; and, (3) Any scenario that relies on a policy-driven assumption should include a sensitivity that removes that assumption. This is already the case for the "net zero" and "delay CEJA" scenarios, but any other similar assumptions should include a sensitivity.

Sensitivities should be applied to all scenarios using "Base" demand growth.

Question 6

Are you interested in being added to our distribution list to be kept up-to-date on news and important information related to the IRP? If so, please provide your contact information in the following section.

Yes