

IPA Integrated Resource Planning Workshop #1: Scenarios

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Respondent Name	Respondent Organization	Respondent Email Address	Respondent Zip Code
Mick McGuckin	SOO Green HVDC Link	mmcguckin@soogreen.com	10011

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?

SOO Green would suggest consideration is given to the following:

- Data center load: ComEd / Exelon public materials point to a materially higher large-load trajectory, with several GW of potential incremental demand by 2030. The scenarios should reflect that updated demand picture.
- Resource costs: IPA's December 2025 Indexed REC procurement cleared at about \$84/MWh, which appears materially above E3's post-2030 renewable cost path. That gap warrants a market-grounded sensitivity analysis of resource cost projections.
- Battery costs: Storage assumptions should be tested against real-world supply chain and commercialization risk, not only long-run learning curves.
- Interregional transfer: Access to firm, controllable new out-state imports should be treated as key resource inputs, not just a background assumption.

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?

SOO Green would like to draw attention to the following:

- Delays to expected capacity because of supply chain or permitting constraints.
- Cost case: Test whether the plan remains robust if renewable costs do not decline as quickly as assumed.
- SOO Green support strong treatment of load growth and CEJA timing: Those remain core scenario drivers.

Question 3

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

SOO Green believes the data source list is comprehensive but notes the following for consideration:

- Illinois procurement results: Recent Indexed REC outcomes, including the roughly \$84/MWh December 2025 result, should help calibrate renewable cost assumptions.

- Utility / RTO load inputs: Public large-load and load-forecast materials should inform demand assumptions.
- Queue / lead-time data: RTO interconnection timing, attrition, and transmission equipment lead times should inform deliverability assumptions.

Question 4

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

SOO Green agrees that data centers and electrification appear to be the right focal drivers.

Some further suggestions:

- Northern Illinois concentration: It would be useful to test how concentrated load growth in ComEd affects transfer constraints and import needs.
- Forecast transparency: It would help to clarify which ComEd load forecast underlies the IRP scenarios.

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

Some further suggested sensitivity concepts as follows:

- Market-grounded renewable cost sensitivity: Test a case calibrated to recent Illinois procurement outcomes rather than only declining ATB-style trajectories.
- BIPA sensitivity and the scenario whereby it would impact potential data centre load growth i.e. BIPA pushing away data center developer interest in Illinois.
- Firm controllable inter-regional import sensitivity: Test a pre-specified 2,000 MW HVDC-style import case in the Base Case and High Load case. Illinois has already evaluated a similar configuration in the 2024 IPA Policy Study, which suggests this would be a reasonable planning sensitivity.

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