OFFICE OF THE OHIO CONSUMERS' COUNSEL
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Consumer Advocates Urge PJM to Delay December Electricity Capacity Auction to Protect Consumers from Billions in Potential Costs

Coalition calls for action on Independent Market Monitor's recommendations to address speculative data center demand, protect electric reliability and prevent unnecessary costs for consumers

COLUMBUS, Ohio – The Office of the Ohio Consumers' Counsel (OCC), joined by consumer advocates from the PJM region, is calling on PJM to postpone its December electricity capacity auction amid warnings that inflated data center demand forecasts could expose consumers to billions of dollars in unnecessary costs and threaten electric reliability.

In a letter sent today to the PJM Board of Managers, the advocates urged PJM to seek approval from the Federal Energy Regulatory Commission (FERC) to delay the December 9-15, 2026 auction. The delay would allow PJM to consider critical reforms recommended by its Independent Market Monitor (IMM), including removing forecasted data-center load from the auction and addressing that demand through a separate reliability mechanism.

PJM operates the regional electric grid and wholesale energy markets serving approximately 67 million people across 13 states and the District of Columbia. Its capacity auctions help secure future electricity supplies, with costs ultimately reflected in consumers' electric bills.

PJM's Independent Market Monitor, which serves as the region's independent wholesale electricity market watchdog, has warned that proceeding with the December auction under current data center demand forecasts could impose an additional $**5 billion to $10 billion in capacity costs on consumers.** The IMM has recommended postponing the auction, removing forecasted data center demand from the regular capacity auction, and establishing a separate Reliability Backstop Auction for data centers that have not secured their own generation through bilateral contracts.

*"Ohioans are already struggling with high electric bills. They should not be forced to pay billions more based on speculative forecasts of data center electricity demand," said **Ohio Consumers' Counsel Maureen Willis**. "PJM's own independent market watchdog has raised serious concerns about the costs and reliability risks associated with the upcoming auction. PJM should heed those warnings, delay the auction, and put safeguards in place so that families and businesses aren't left paying for electricity capacity that data centers may never need."*

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The IMM has also identified nearly **$30 billion in increased capacity costs associated with data center demand in prior auctions,** underscoring the financial stakes for consumers throughout the PJM region.

The consumer advocates are urging PJM to act before the December auction locks in additional costs. Their request would provide time to evaluate the IMM's recommended reforms, improve the treatment of forecasted data center demand, and ensure that reliability needs are addressed without unfairly shifting costs to existing consumers.

"Economic development should not come at the expense of affordable electricity," Willis added. "Data centers should be responsible for the costs they create. Ohio families and other existing consumers should not be expected to subsidize speculative growth."

The consumer advocates signing the request include:

- Office of the Ohio Consumers' Counsel
- Delaware Public Advocate
- West Virginia Consumer Advocate
- Maryland Office of People's Counsel
- Pennsylvania Office of Consumer Advocate
- Illinois Citizens Utility Board
- New Jersey Division of Rate Counsel
- Illinois Attorney General

(please see the letter attached)

About the Office of the Ohio Consumers' Counsel

The Office of the Ohio Consumers' Counsel is the state's advocate for residential utility consumers. OCC represents the interests of Ohio consumers in proceedings before the Public Utilities Commission of Ohio, the Federal Energy Regulatory Commission, and other regulatory and judicial forums.