



MEETING AGENDA PACKAGE

Policy Makers Liaisons Committee

April 15, 2026
12:30 p.m. to 2:00 p.m.

Meeting Being Held at:

Florida Municipal Power Agency
8553 Commodity Circle, Orlando, FL 32819

Phone Dial-in Information:

+1 321-299-0575,,261 732 936 044 9#

Teams Link: [Join the meeting now](#)

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Policy Makers Liaisons Committee

- Robert Page, Green Cove Springs –Chair
- Trish Pfeiffer, Bartow
- Mike Eastburn, Bushnell
- Jimmy Pittman, Clewiston
- Vacant, Fort Meade
- Michael Broderick, Fort Pierce
- Javier Cisneros, Fort Pierce Alternate
- Vacant, Town of Havana
- George Forbes, Jacksonville Beach
- Robert Barrios, Key West
- Pat Labrada, Key West Alternate
- Ethel Urbina, Kissimmee
- Rae Hemphill, Kissimmee, Alternate
- Manny Ortega, Kissimmee, Alternate
- Jimmy Burry, Leesburg
- Tim Marden, Newberry
- Jim Hilty, Ocala – Vice Chair
- Kolby Urban, St. Cloud
- Bob Milner, Starke

Community Power **+** Statewide Strength



MEMORANDUM

TO: Policy Makers Liaisons Committee

FROM: Susan Schumann

DATE: April 08, 2026, Revised April 14, 2026

RE: Policy Makers Liaisons Committee Meeting
Wednesday, April 15, 2026 at 12:30 p.m. [NOTE TIME]

PLACE: FMPA 8553 Commodity Circle, Orlando, FL 32819, Board Room

DIAL-IN: +1-321-299-0575, MEETING NO. 261 732 936 044 9#

LINK: [Join the meeting now](#)

Chair Bob Page, Presiding

The mission of the Committee is to facilitate the education of elected or appointed governing body members of FMPA's member utility systems, and to foster opportunities for greater communication and knowledge among governing body members regarding the business and projects of FMPA.

AGENDA

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- 2. Set Agenda (by vote) 6
- 3. Consent Agenda
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- 4. Report from GM and CEO - Winter Storm Fern and FY2026
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- 6. Information Items
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- 8. Announcements
 - a. Next Meeting July 16, 2026 at the FMEA Annual Conference56

- 9. Adjourn57

One or more participants in the above referenced public meeting may participate by telephone. At the above location there will be a speaker telephone so that any interested person can attend this public meeting and be fully informed of the discussions taking place either in person or by telephone communication. If anyone chooses to appeal any decision that may be made at this public meeting, such person will need a record of the proceedings and should accordingly ensure that a verbatim record of the proceedings is made, which includes the oral statements and evidence upon which such appeal is based. This public meeting may be continued to a date and time certain, which will be announced at the meeting. Any person requiring a special accommodation to participate in this public meeting because of a disability, should contact FMPA at (407) 355-7767 or 1-(888)-774-7606, at least two (2) business days in advance to make appropriate arrangements.

**QUORUM REQUIREMENT
(MAJORITY OF AVERAGE NUMBER OF MEMBERS PRESENT FROM LAST
4 PMLC MEETINGS)**

April 16, 2025 – 8 present

July 24, 2025 – 8 present

October 22, 2025 – 8 present

January 14, 2026 – 8 present

Quorum needed: 8 Members

**AGENDA ITEM 1 - CALL TO ORDER,
ROLL CALL, DECLARATION OF
QUORUM**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

**AGENDA ITEM 2 – SET AGENDA (by
vote)**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

AGENDA ITEM 3 – CONSENT AGENDA

- a. Approval of Minutes for the Meeting
Held January 14, 2026**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

MINUTES
FMPA POLICY MAKERS LIAISONS COMMITTEE MEETING
FLORIDA MUNICIPAL POWER AGENCY
8553 COMMODITY CIRCLE
ORLANDO, FL 32819
JANUARY 14, 2026
TIME: 12:30 P.M.

**MEMBERS
PRESENT**

Javier Cisneros, Fort Pierce
Bob Page, Green Cove Springs
George Forbes, Jacksonville Beach
Robert Barrios, Key West (virtual)
Rae Hemphill, Kissimmee
Jimmy Burry, Leesburg
Jim Hilty, Ocala
Kolby Urban, St. Cloud
Bob Milner, Starke (virtual)

**OTHERS
PRESENT**

Allen Putnam, Jacksonville Beach
Jason Terry, Kissimmee
Cindy Clemmons, Lakeland (virtual)
Ed Liberty, Lake Worth Beach
Efren Chavez, New Smyrna Beach (virtual)
Doug Peebles, Ocala
Drew Mulins, Starke
Lisa Vedder, Winter Park (virtual)
Michael Nolan, MJN Consulting

**STAFF
PRESENT**

Jacob Williams, General Manager & CEO
Jody Finklea, General Counsel and Chief Legal Officer
Ken Rutter, Chief Operating Officer
Rich Popp, Chief Financial Officer
Sharon Adams, Chief People and Member Services Officer
Chris Gowder, Chief System Operations and Technology Officer
Navid Nowakhtar, Member Services Strategic Planning & Analytics
Vice President
Dan O'Hagan, Deputy General Counsel and Manager of Regulatory
Compliance
Mike McCleary, Senior Manager of Member Services
Sue Utley, Executive Assistant to CEO / Asst. Secretary to Board
Lindsay Jack, Executive Assistant Support Coordinator
Andrei Benjamin, Cloud Systems Administrator

Item 1 – Call to Order, Roll Call, Declaration of Quorum

Chair Bob Page, called the meeting to order at 12:31p.m. on Wednesday, January 14, 2026. A video and audio connection for public attendance and participation was

broadcast at Florida Municipal Power Agency, 8553 Commodity Circle, Orlando, Florida. A roll call was taken and 9 Members were present out of 15.

Jacob Williams introduced Cindy Clemons, Lakeland Manager of Legislative and Regulatory Relations and Lisa Vedder, Winter Park.

Item 2 – Set Agenda (By Vote)

MOTION: Javier Cisneros, Fort Pierce, moved to set the agenda as presented. Rae Hemphill, Kissimmee, seconded the motion. Motion carried 9-0.

Item 3 – Consent Agenda

- a. Approval of the Minutes for the Meeting Held October 22, 2025

MOTION: Jimmy Burry, Leesburg, moved to approve the minutes of the October 22, 2025, meeting. Javier Cisneros, Fort Pierce, seconded the motion. Motion carried 9-0.

Item 4 – Report from the General Manager and CEO

- a. Goals Score Card & Milestones
- b. Closed on Bartow Energy Center
- c. Stanton \$14 million savings
- d. Lake Worth Beach Power Provider
- e. Expanded Homestead Power Sales
- f. Whistling Duck Solar Online
- g. Last SERC data requests

Item 5 – Action Items

- a. None

Item 6 – Information Items

- a. Permit Reform and Federal Legislative Update

Michael Nolan, MJN Consulting LLC presented on permit reform and Federal legislative updates.

- b. Administration Actions and Power Market Dynamics

Jacob Williams presented on National Discussions and Trends.

Item 7 – Member Comments

None.

Item 8 – Announcements

- a. Next Meeting: April 15, 2026, at FMPA, 8553 Commodity Circle, Orlando, FL.

Item 9 - Adjourn

There being no further business, the meeting was adjourned at 1:05p.m.

Bob Page
Chairman

Sue Utley
Assistant Secretary

Date Approved _____

BP/su

**AGENDA ITEM 4 – REPORT FROM
THE GENERAL MANAGER AND CEO**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**



Winter Storm Fern and GM Comments

Policy Makers Liaisons Committee

April 15, 2026

Winter Storm Fern – 1 in 100 Year Extreme Cold in FL

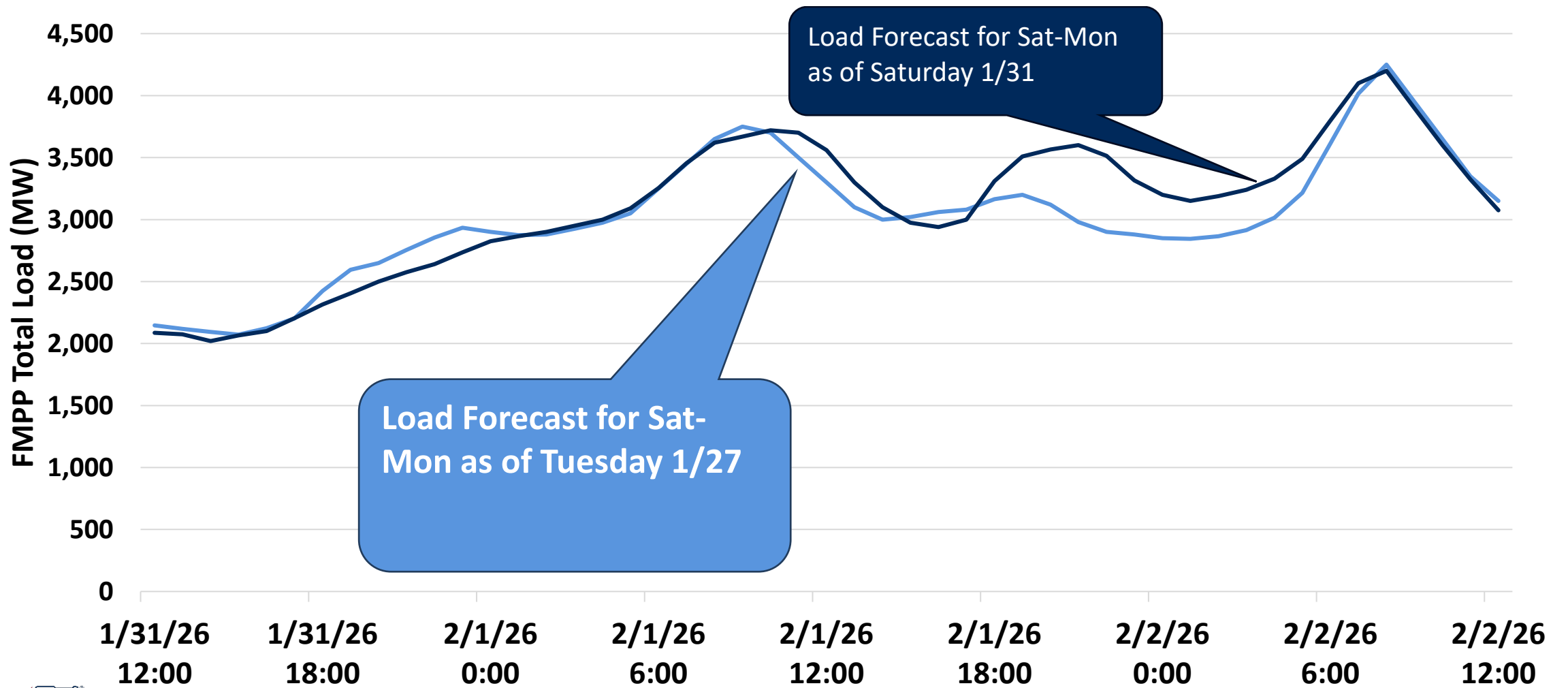
Great Generation, Fuels, Operations, Customer, FDEP & DOE Support

All Options Needed to Serve Potential All-Time Peak

- Fern brought record/near record cold temps/wind chills in Central & South Florida
- Florida all-time "needle peak" forecast; 6 – 9 am and 6 – 9 pm challenge/opportunity
- Loads and plants operating in conditions not contemplated, especially Sunday
- Challenging Sun. 2/1, FMPA Fleet Team Halftime adjustments & delivered Mon. 2/2
- Early-action on options paid off 2/2 – offset forecast of 12% increase over 2/1
- Members and their customers big part of solution – City/utility & Publix generation
- Customer communications critical to shifting use out of 6 – 9 am Monday window
- Municipals have unique advantages - customer generation & customer communication
- FDEP and DOE provided important utility & customer-owned generation support

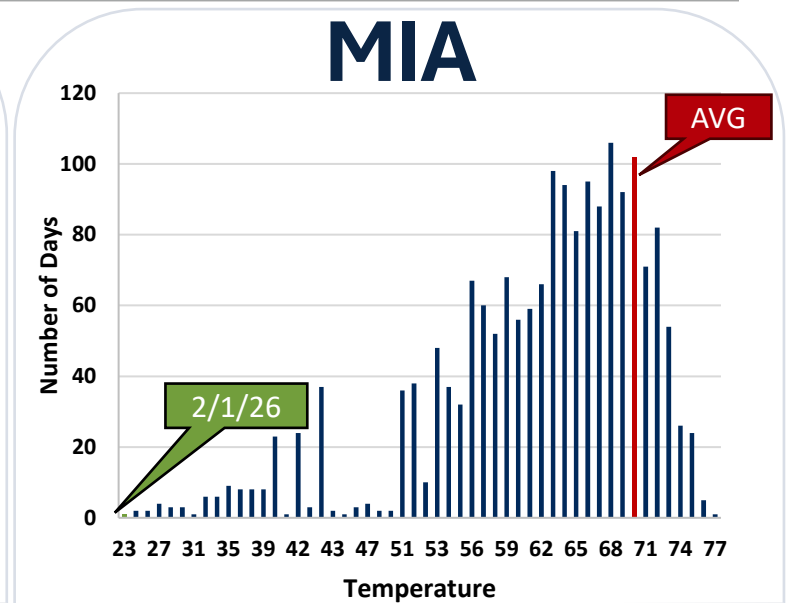
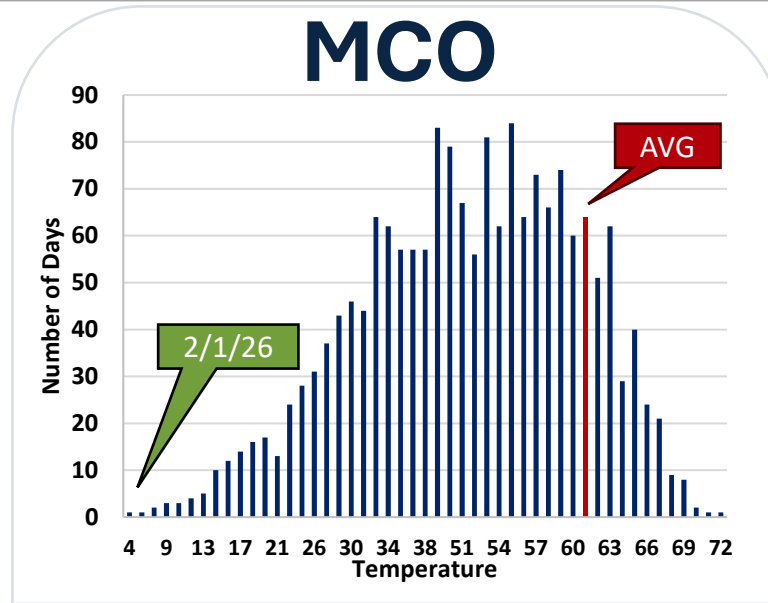
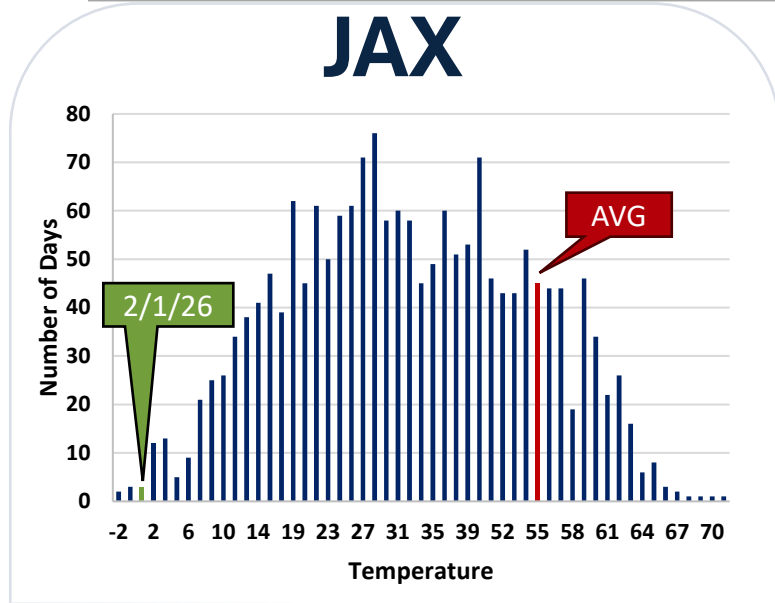
FMPP Load Forecast for Monday - Potential Load Shed

Generation Capacity of ~4,200 MW Assuming No Generation Loss



1-in-100 Year Historic Cold for Central/South FL

Lowest Recorded Wind-Chill In Last 100 Years for Orlando & Miami



| | |
|-------------|----------------|
| Daily low | Wind Chill Low |
| 22°F | 1.9°F |

| | |
|-------------|----------------|
| Daily low | Wind Chill Low |
| 24°F | 4.7°F |

| | |
|-------------|----------------|
| Daily low | Wind Chill Low |
| 35°F | 22°F |

Both #9 coldest since 1996

New Record Low

New Record Low

Extreme Cold Beyond Winterization Plan, Adjusted

TCEC Long Planned Major Outage 4 Days In, No Way to Get Back

- Orlando at 24 degrees lower than winterization plan for 32 degrees
- 2.5% avg. forced outage rate challenged in extreme cold, 10% likely
 - FMPP 20 units, 100+ MW - likely 2 units would fail
 - 5 units failed Sunday morning
 - Numerous "halftime" adjustments Sunday p.m.
 - No large unit failures Monday
- Upgraded units 82 MW for winter & added 24 MW via transmission
- Environmental engagement & waiver with FDEP & DOE critical to achieve unit upgrades

24 Degree Air Temps and 6 Degree Windchills Created Challenging Environments for Plants to Operate

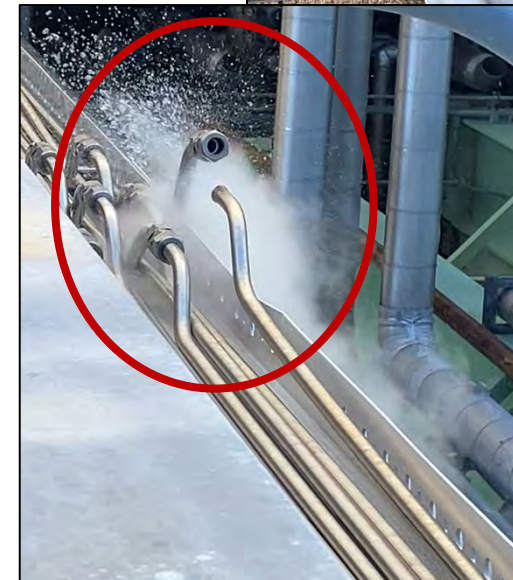


Ice on Cane Island equipment created challenges for repairs



Ice on new SLEC cooling tower

Iron piping froze and cracked



Cane Island 4 - various instrument tubing failures

Team Implemented Mitigations Sun. PM & Early Mon.

Hard Work & Innovative Solutions Made Units Available Monday



Mulberry constructed multiple coverings to insulate and heat critical equipment



Sand Lake used common house insulation to protect vital equipment & transmitters



Member & Customer Engagement Early

Critically Important to Shifting Use from Needle Peak






- Load forecast Tues-Sat - significant concern on serving load Monday a.m.
 - Wide load forecast error - limited data on potential temperature & wind chill
 - All options needed to be available early
- Sun./Mon. needle peak - opportunity to "shift use" from 3-hour period am & pm
- Members/customers actions – need communication/coordination early
 - Member/customer generation reduced load – City back-up gen. & Publix
- Remove air & operating permit concerns for member/customer generation
- DOE outreach on Wednesday – very responsive obtaining Sec. 202c order
 - 1st time for customer generation
- Members engaged backup generation on Thur/Fri - scheduled Sun/Mon
- Customer load shifting communications ramped up Friday


Proactive Outreach To Customers Helped Lower Loads

What Steps To Take During Critical Hours To Shift Use

CONSERVE ENERGY

During Peak Hours, 7:00P-10:00P & 6:00A - 9:00A


-  Avoid charging electric vehicles during peak hours.
-  Reduce use of hot water during peak periods.
-  Turn off pool heaters during peak hours.
-  Use the heat natural light brings during the day.
-  Set your thermostat to the lowest comfortable temperature.



HELP CONSERVE ENERGY



1. Shorten hot showers.
2. Stagger appliance use.
3. Keep the fridge closed.
4. Unplug or switch off unused devices.
5. Lower your thermostat a few degrees.



Members Reduced Load Thru Back-up Gen. & Load Shifting

Reduced Peak Load Served by 3 – 6%

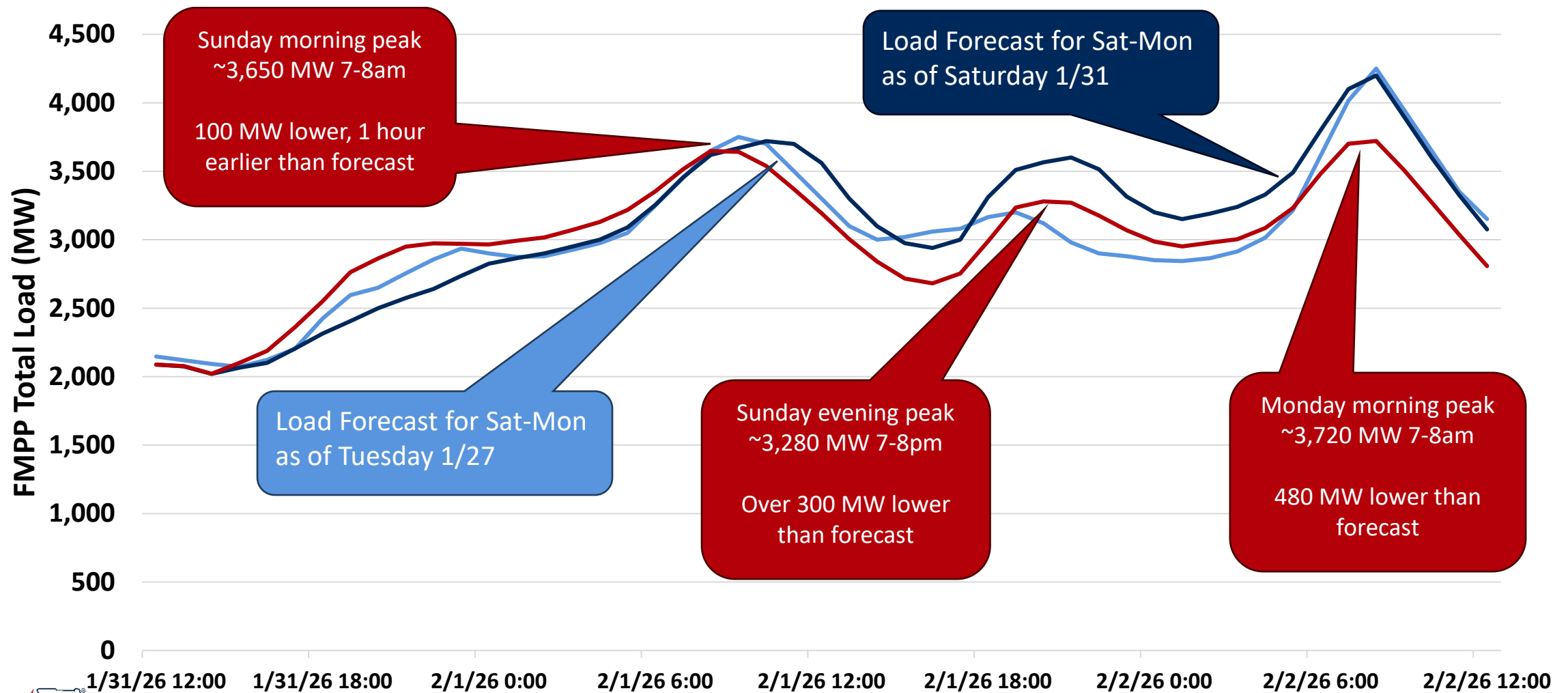
- Members reduced load with back-up generation & load shifting
- ARP served load and had 53 MW of nameplate back-up generation operating

| FMPA Back up Totals | Nameplate (MW) |
|---------------------|----------------|
| Member Backup | 39 |
| Publix | 14 |
| Total FMPP | 53 |

- Members communications with customers led to load shifting of 2-4% additional load reduction
- Important to communicate in advance to receive the benefits

FMPP Mon. Peak Load Ramp Lower Than Forecast

Customer Use of Shifting and Back-up Generation Huge Relief



Market Signaling Little To No Liquidity Pre-Weekend

High Prices For Delivered Gas Drove Diesel Runs For Savings

- No utilities offering to sell power going into weekend
- One bid to buy at \$2,000/MWh for weekend
- Energy power sold for \$1,500 – \$2,000/MWh
- FGT Zone 3, city gates, and dispatch prices \$40 - \$80/MMBtu
 - Means \$400 – 1,000/MWh for gas-based peakers
- Favors diesel runs at ~\$200/MWh

| Gas Zone | High Price | Date |
|----------------|------------|--------|
| FGT Zone 3 | \$39.38 | Jan-27 |
| FGT City Gates | \$64.11 | Feb-01 |
| FMPP Dispatch | \$78.00 | Feb-01 |
| Fuel Oil | \$18.79 | Jan-29 |

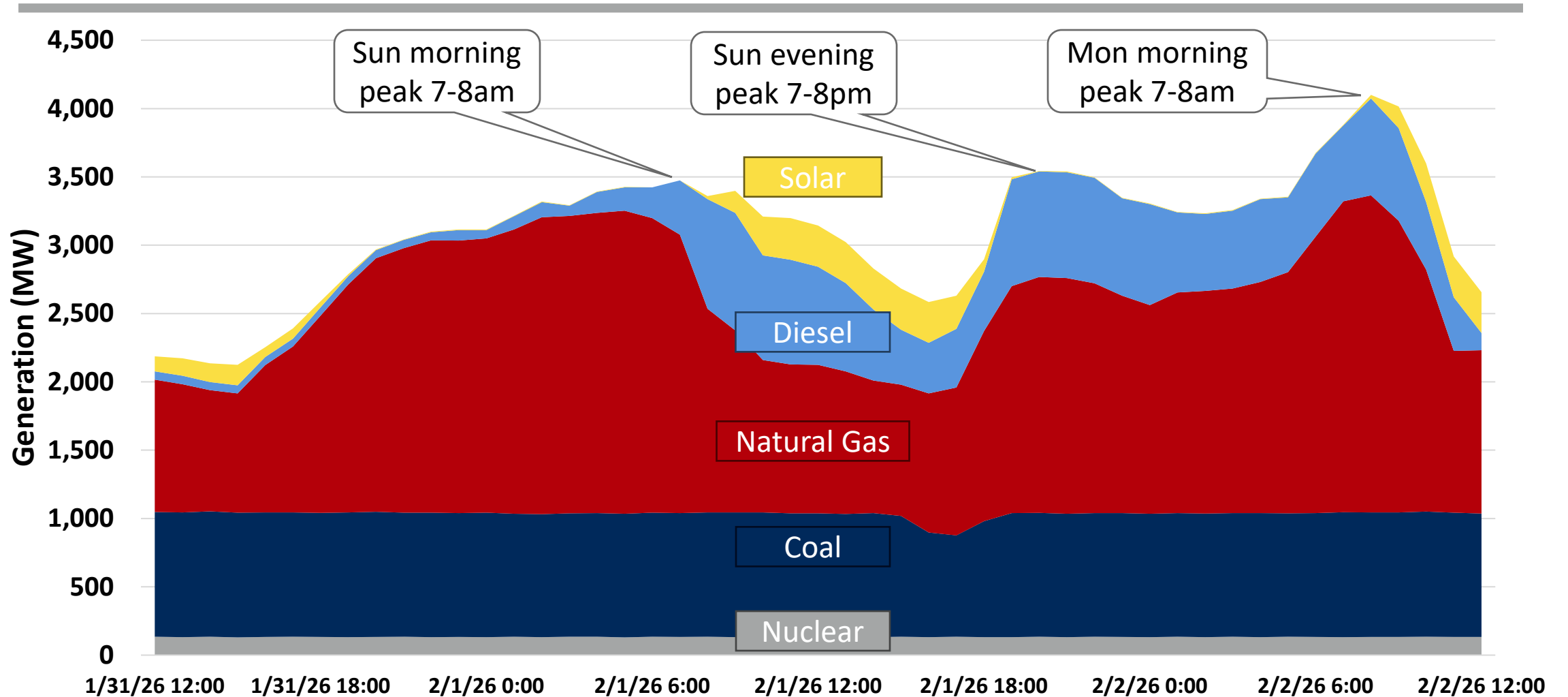
Tight Reserve Margins Across Entire FRCC Region

Four Balancing Authorities in EEA Sometime During Sunday - Tuesday

- Several utilities concerned of being at some level of emergency on Friday
- Conservative operations declared for Fri midnight through Tue noon
- Generating Capacity Advisory issued Fri afternoon for Sun-Mon risk
- No utility (BA) entered Sunday in EEA
- FMPP declared inability to meet load (EEA3) Sun morning
 - Due to loss of >1200 MW of generation
- Major utility declared on Sunday, likely no emergency power for Monday
- 3 Utilities (BAs) 33% of state (IOU, Co-op and Muni) deficient reserves (EEA1) Monday
 - One utility exercised interruptible customers (EEA2)
 - FMPP no issues, able to sell to utility in trouble
- 1 utility (BA) briefly in could not meet reserves on Tues. morning

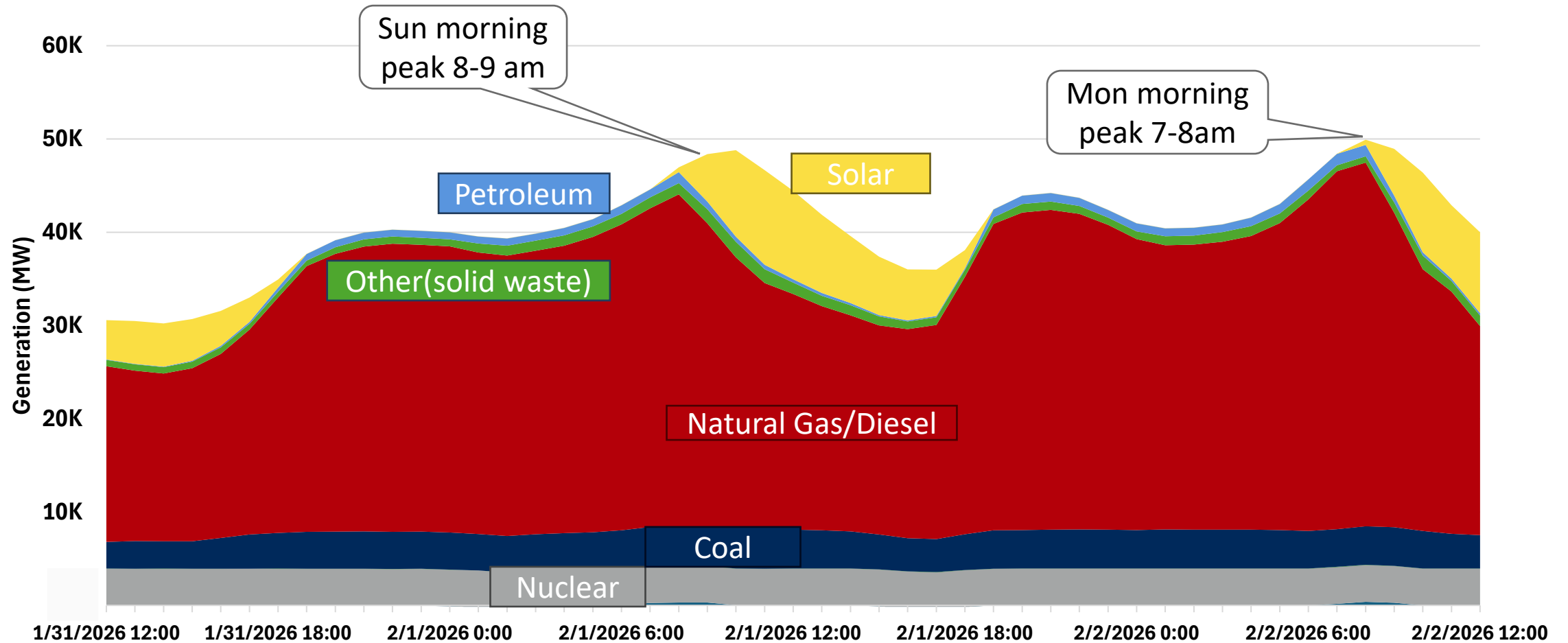
Gas, Coal, Diesel, & Nuke 100% FMPP Supply at Peak

Morning 8 AM And Evening 8 PM Peaks ~0 MW Solar



Florida 100% Gas, Coal, Diesel & Nuke - Monday Peak

Monday Morning Peak at 8 am; Essentially No Solar



Super Bowl Fern – Historic Cold in Florida

All Options and Teams Needed to Win

- Fern record cold in Central & South Florida
- Florida "needle peaks" challenge & opportunity
- Challenging Sunday, FMPP Halftime adjustments successful
- Early-action on back-up generation and customer "use shifting" paid off
- Municipal advantage access to City/utility back-up generation & customer comms
- FDEP and DOE provided important support for utility & back-up generation

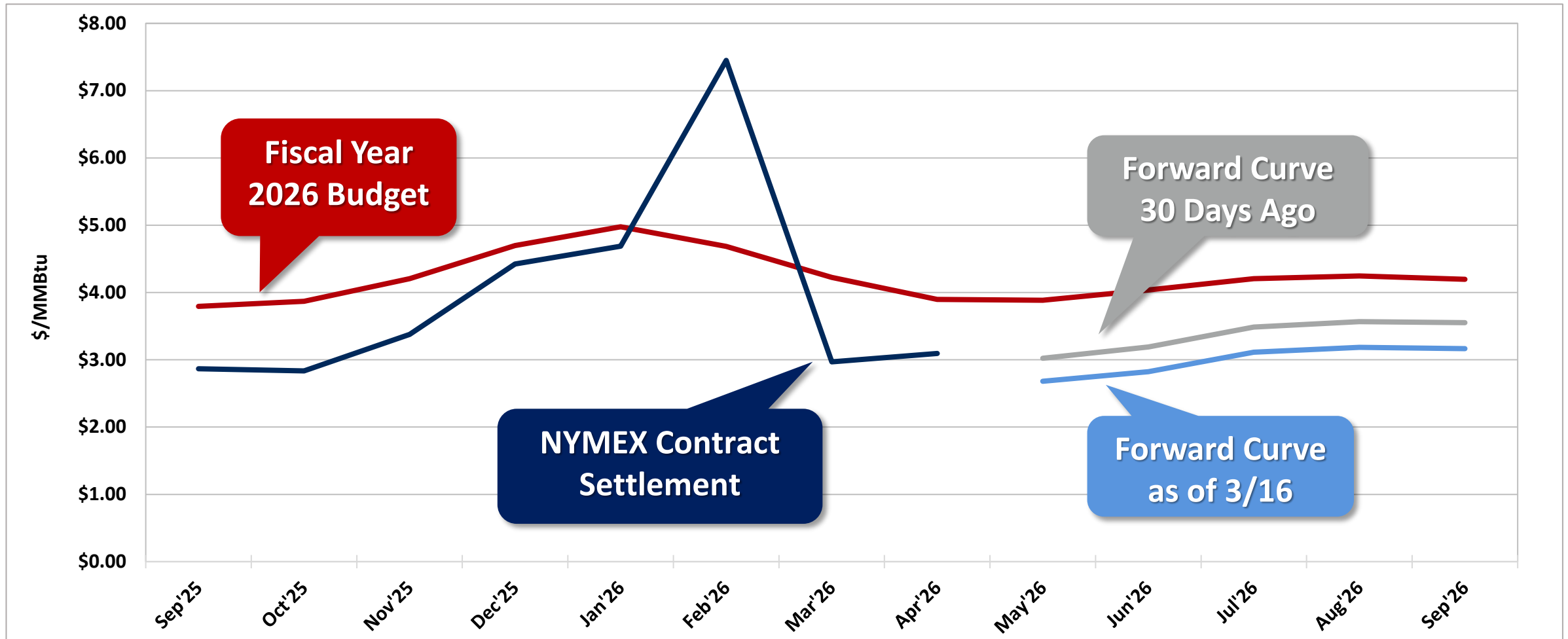


Fiscal Year 2026 Management Goals – March Data

| Goal | Status | Actual | YTD Actual | YTD Target | FY 2026 Target | Comment |
|--|---------------------------------------|----------|------------|------------|----------------|---|
| 1. Safety | Lost-time Accidents | 0 | 0 | 0 | 0 | |
| | OSHA Recordables | 0 | 2 | 0 | 0 | |
| 2. Compliance | Environmental | 0 | 0 | 0 | 0 | Zero compliance violations |
| | Financial | | | | 0 | |
| | <u>Regulatory</u>
Successful Audit | | | | 0 | NERC On-Site Audit Completed
No adverse findings |
| 3. Low Cost
(\$/MWh) | FY26 Rate Objective | \$126.11 | \$100.21 | \$86.80 | \$81.00 | February Participant sales 2.4% > budget. Includes cash support for rate smoothing. |
| | Fuel | \$71.69 | \$45.98 | \$30.51 | \$29.87 | |
| | Non-Fuel | \$54.42 | \$54.23 | \$56.29 | \$51.13 | |
| 4. Establish Florida
New Nuclear Effort | | | | | | Met new FPL President; Not a priority awaiting new Governor
NRC hastening new nuclear permits
DOE not funding entire plants
nor backstopping costs |

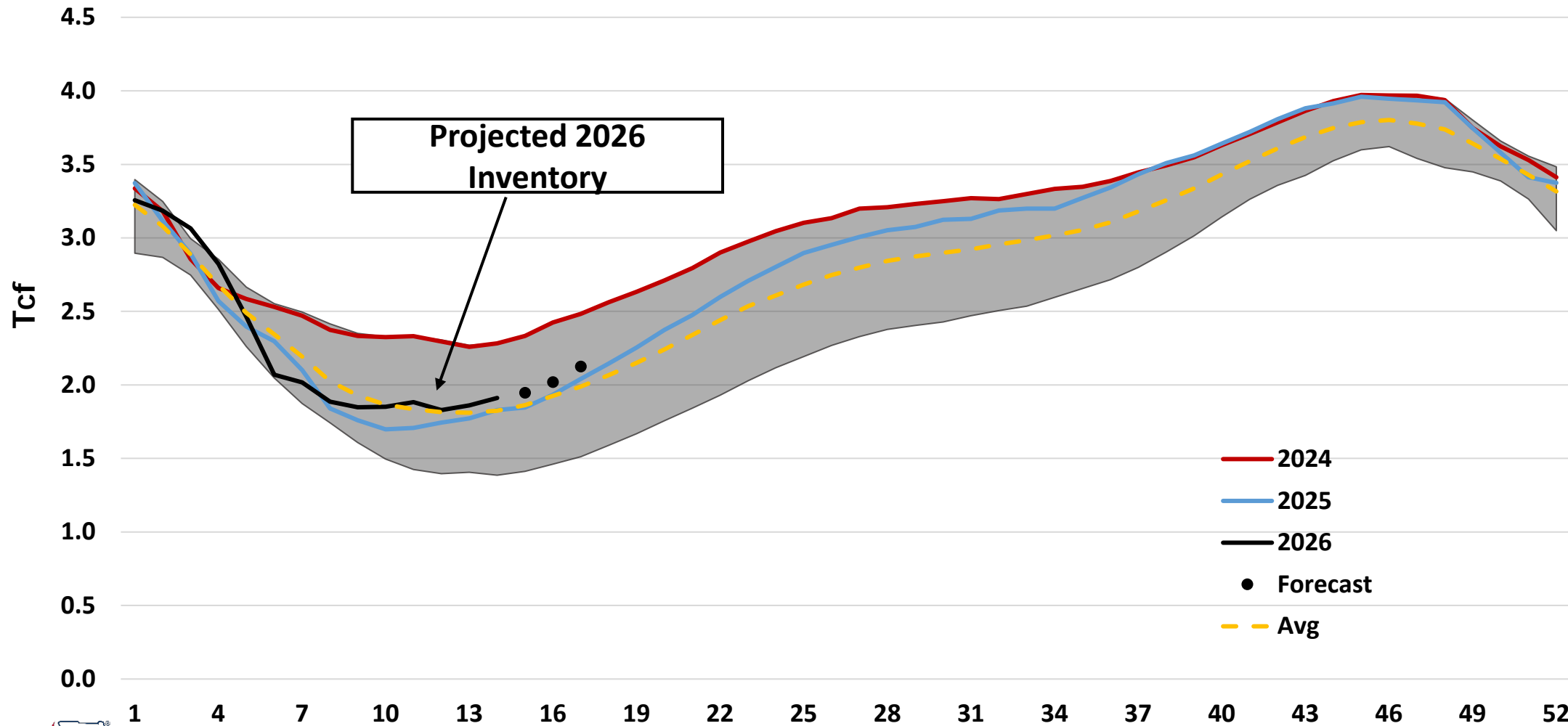
Gas Prices Remain Below Budget as Winter Prices Spike

Prices Falling With Increase Supply/Production From Crude



Gas Storage Reached New Peak Before Winter Demand

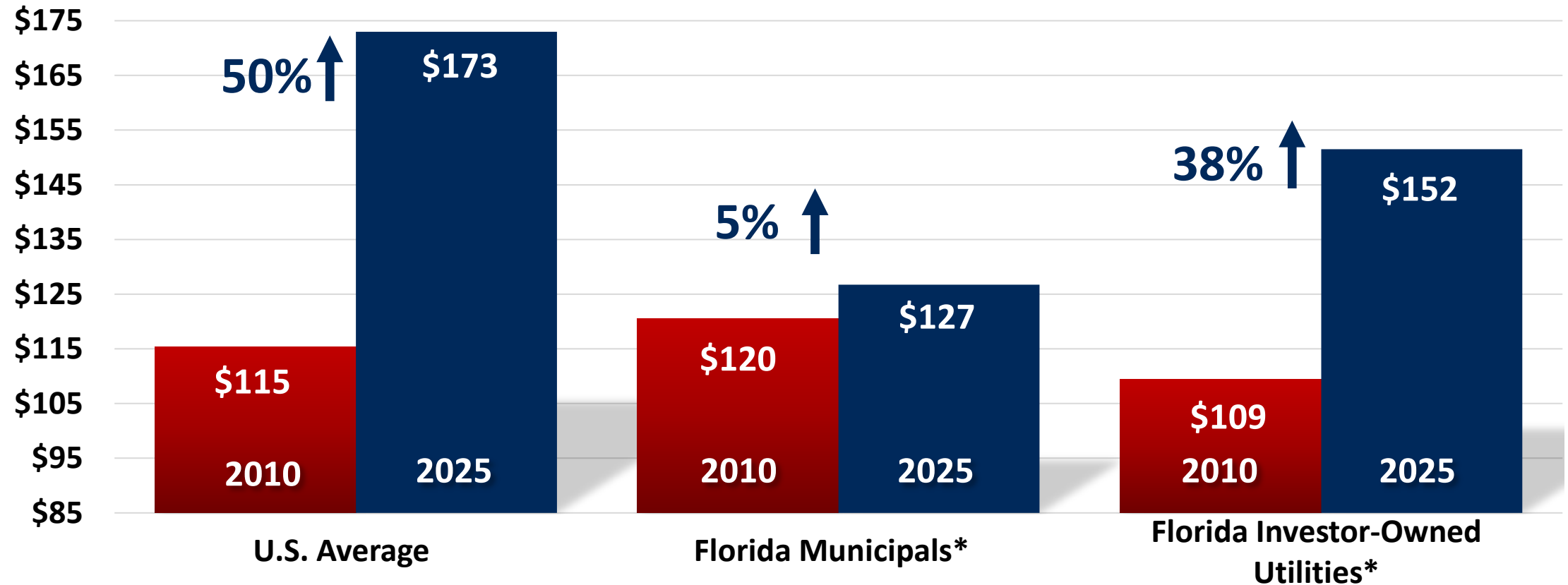
Winter '25/'26 Cold to Be Offset by 30 GW of '26 New Solar



FL Utilities Lead in Providing Low-Cost Electricity

Municipal Rates 5% Higher than in 2010, U.S. Rates Up ~50%

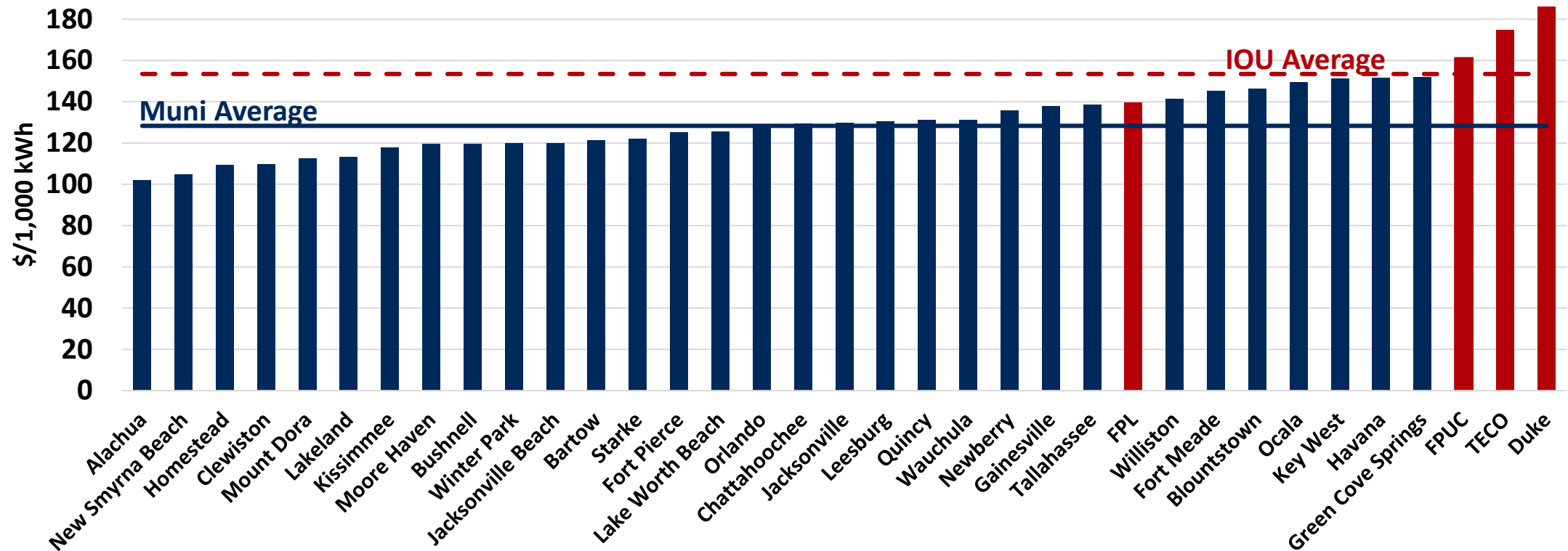
1,000 kWh Residential Bill Comparison



25 FL Muni Rates Consistently Lower than Lowest IOU

Munis Weighted Average \$128 vs IOU Weighted Average \$153

1,000 kWh Residential Bill Comparison: Mar '25 through Feb '26

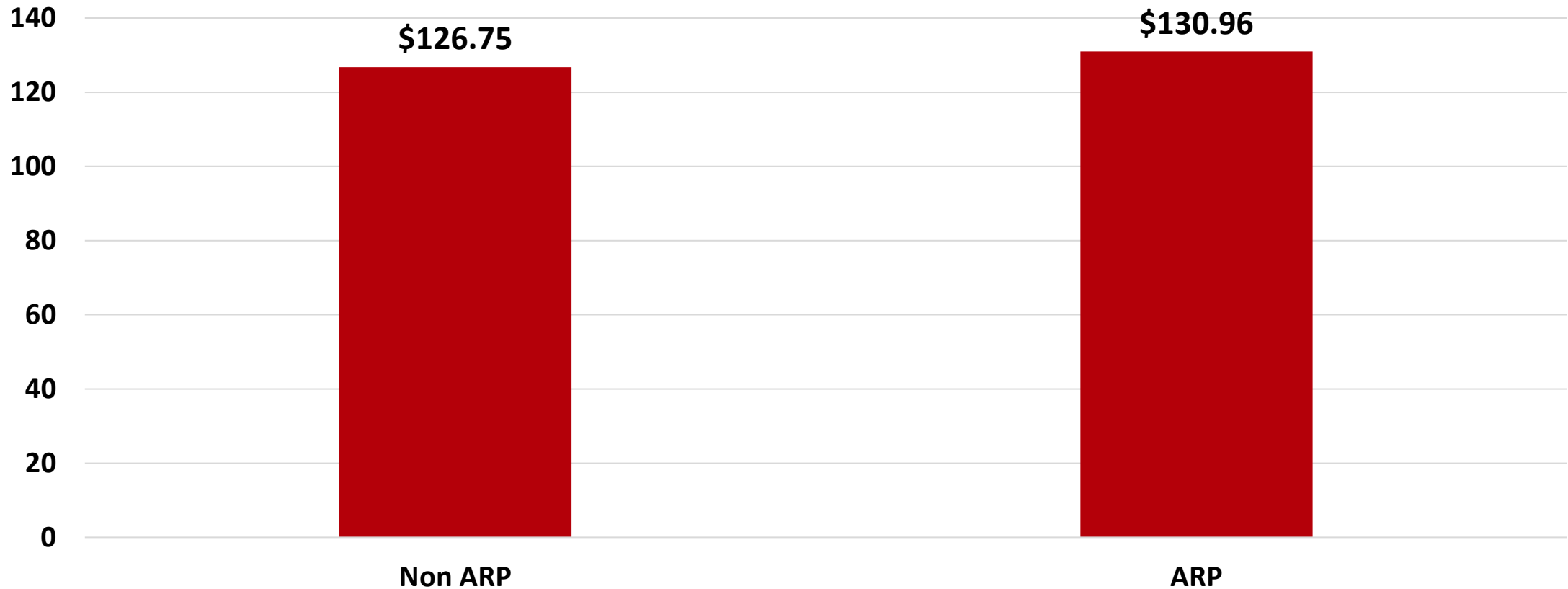


Note: Rates are weighted by 2023 annual load.

13 ARP Cities Very Competitive with Other Municipals

Individual Cities Rates Vary with Numerous Local Factors

1,000 kWh Residential Bill Comparison: Feb 2025 through Jan 2026



Note: Rates are weighted by 2024 annual load.

Whistling Duck Ribbon-Cutting

FMPA and Member Cities Celebrated Fourth Solar Site on March 18



AGENDA ITEM 5 – ACTION ITEMS

a. None

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

**AGENDA ITEM 6 – INFORMATION
ITEMS**

a. Reliability Update

**Policy Makers Liaisons Committee Meeting
April 15, 2026**



6a – Reliability Update

Policy Makers Liaisons Committee

April 15, 2026

2025 Municipals Outage Duration Down ~21%

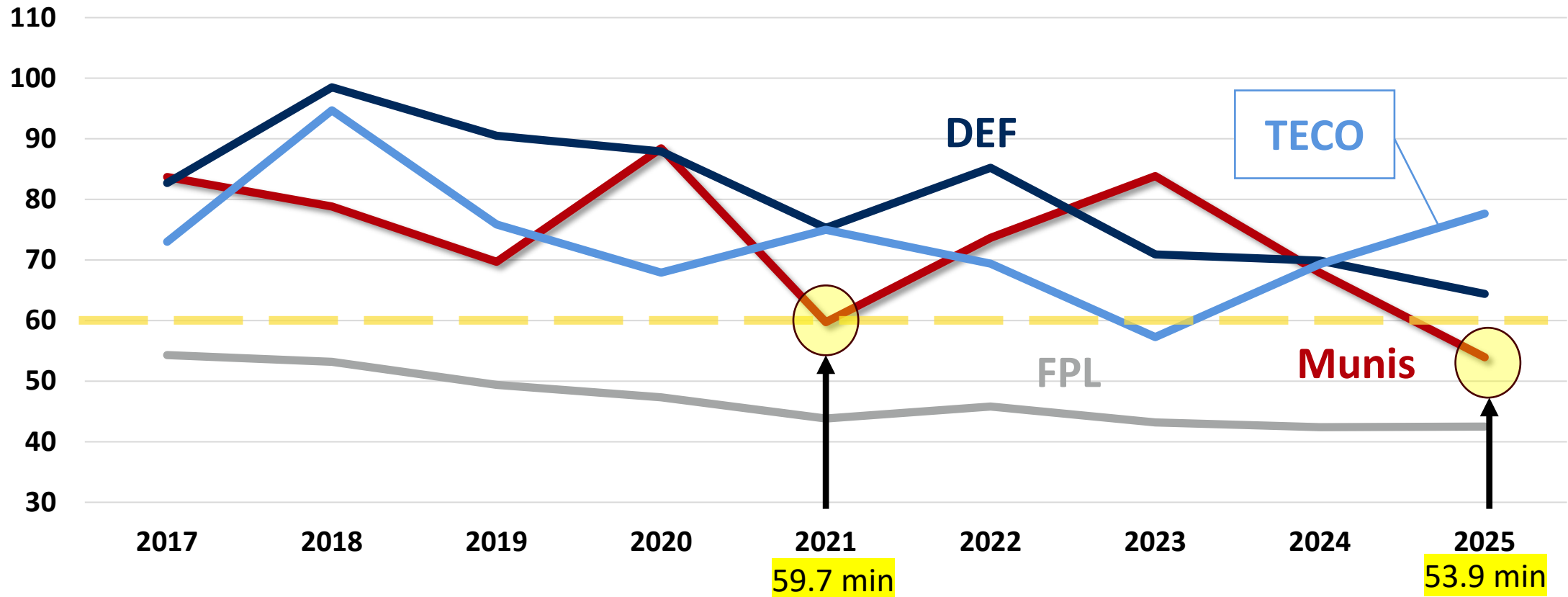
Gaining Ground On IOUs, Working To Continue Trend

- Municipals ~21% reduction in average outage duration (SAIDI)
- 2025 is the lowest overall SAIDI since program tracking began
- Municipals made greater SAIDI gains than IOUs in 2025
- 11 of 24 participating municipals showed SAIDI improvement
- 13 municipals lower outage duration than best IOU in state
- Municipals lead state in restoration time and length of outage per customer

Municipals' SAIDI Down ~21% In 2025, Below Goal

Improvement Over Duke & TECO With FPL ~Flat To Prior Year

All Municipal and IOU SAIDI By Year



Municipals Improved on Most Key Categories

21% SAIDI Improvement Vs. 2024, 3 Other Key Metrics Down

Distribution Reliability Indices, Calendar Year 2025

Red= increase and Green= decrease (improvement)

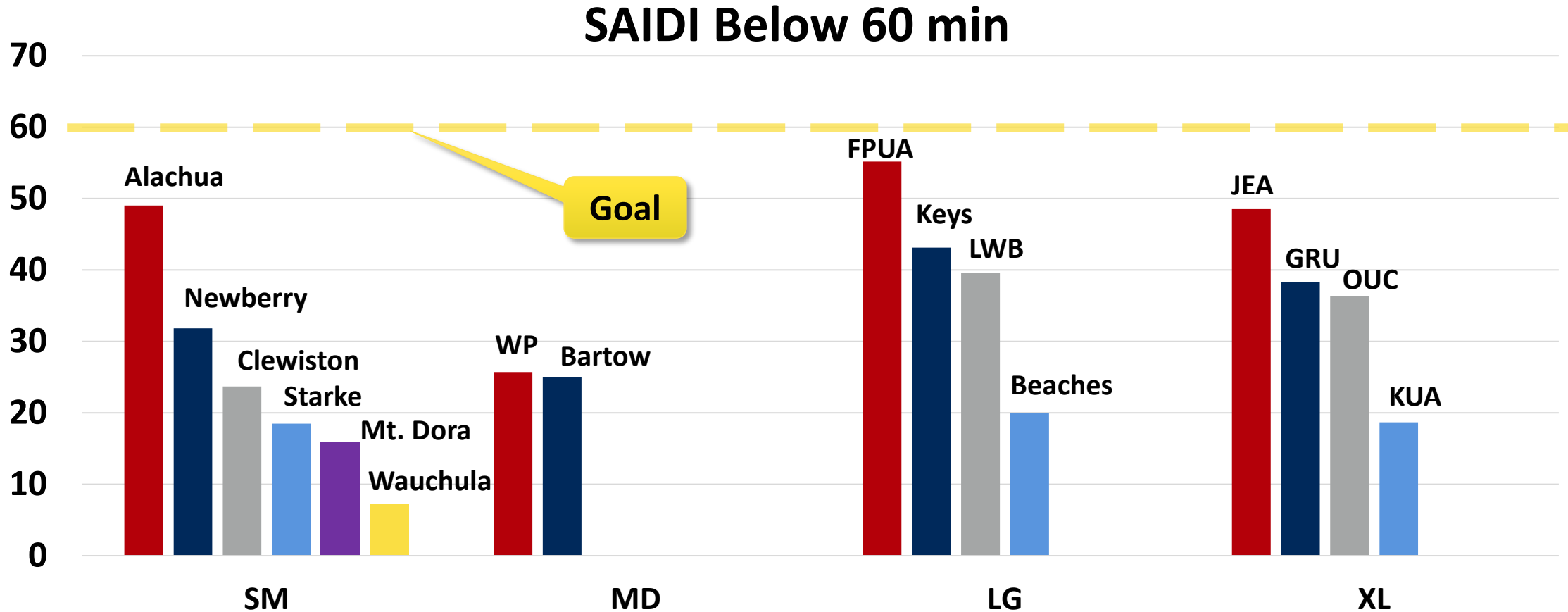
| 2024 vs 2025 | Munis | | FPL | | TECO | | Duke | |
|---------------------------------|-------|------|-----|-----|------|------|------|------|
| Duration (SAIDI) | 54 | -21% | 42 | 0% | 78 | 12% | 64 | -8% |
| Restoration Time (CAIDI) | 57 | -18% | 78 | 2% | 74 | 10% | 78 | -7% |
| Frequency (SAIFI) | 0.9 | -4% | 0.5 | -2% | 1 | 1% | 0.8 | -1% |
| Momentaries (MAIFle) | 2 | 9% | 2 | 0% | 5 | -6% | 0.8 | -20% |
| Length (L-Bar) | 108 | -26% | 219 | 7% | 136 | -17% | 155 | -20% |

SOURCES: Investor-owned data from Florida Public Service Commission. Municipal data weighted average for utilities in FMPA's Distribution Reliability Measurement Program.

Note: TECO 2024 data was revised with PSC. Original 2024 SAIDI of 109 min was corrected to 69 min.

Leading Municipals Providing Best In Class Reliability

16 Municipals Below 60 Min SAIDI Goal vs 13 from 2024

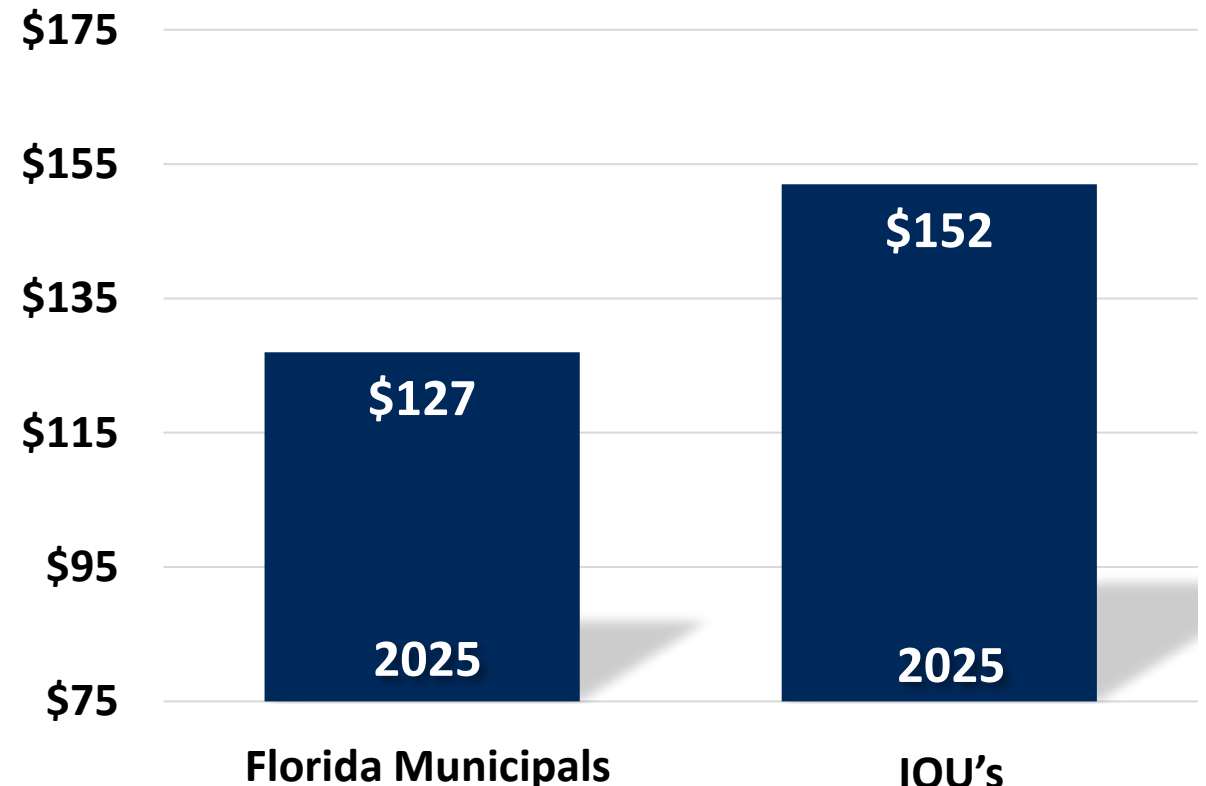


Municipals In Unique Cost Position To Invest

Time to Capitalize on Rate Advantage to Regain Ground

- Florida Municipal's SAIDI improved from 2024, achieving goal below 60
- Municipal rates ~16% lower than IOU's
- Opportunity to use rate headroom for capital improvements & maintenance
 - Vegetation Management
 - Fuse Coordination
 - Thermal (IR) Scans
 - Routine Inspections
 - Strategic Undergrounding

CY 25 1,000 kWh Residential Bill Comparison (Weighted Average)



PRELIMINARY RESULTS - FPPRA



FLORIDA PUBLIC POWER RELIABILITY AWARDS

Florida Public Power Reliability Awards

Lowest Duration and Largest Reduction % Winners

Leadership Award

Lowest Duration (SAIDI) by Group

Wauchula (SM)

Bartow (MD)

Beaches (LG)

KUA (XL)

Momentum Award

Largest Duration (SAIDI) Reduction %

Newberry (SM)

Bartow (MD)

Beaches (LG)

JEA (XL)

Florida Public Power Reliability Awards

Endurance Award Winners – 60 Minutes or Less, Consecutive Years

Small

Alachua (3Yrs)

Starke (4Yrs)

Wauchula (6Yrs)

Clewiston (2Yrs)

Mt. Dora (2Yrs)

Medium

Winter Park
(10Yrs)

Bartow (2Yrs)

Large

Beaches (12Yrs)

Keys Energy
(4Yrs)

FPUA (2Yrs)

Lake Worth Beach
(2Yrs)

X-Large

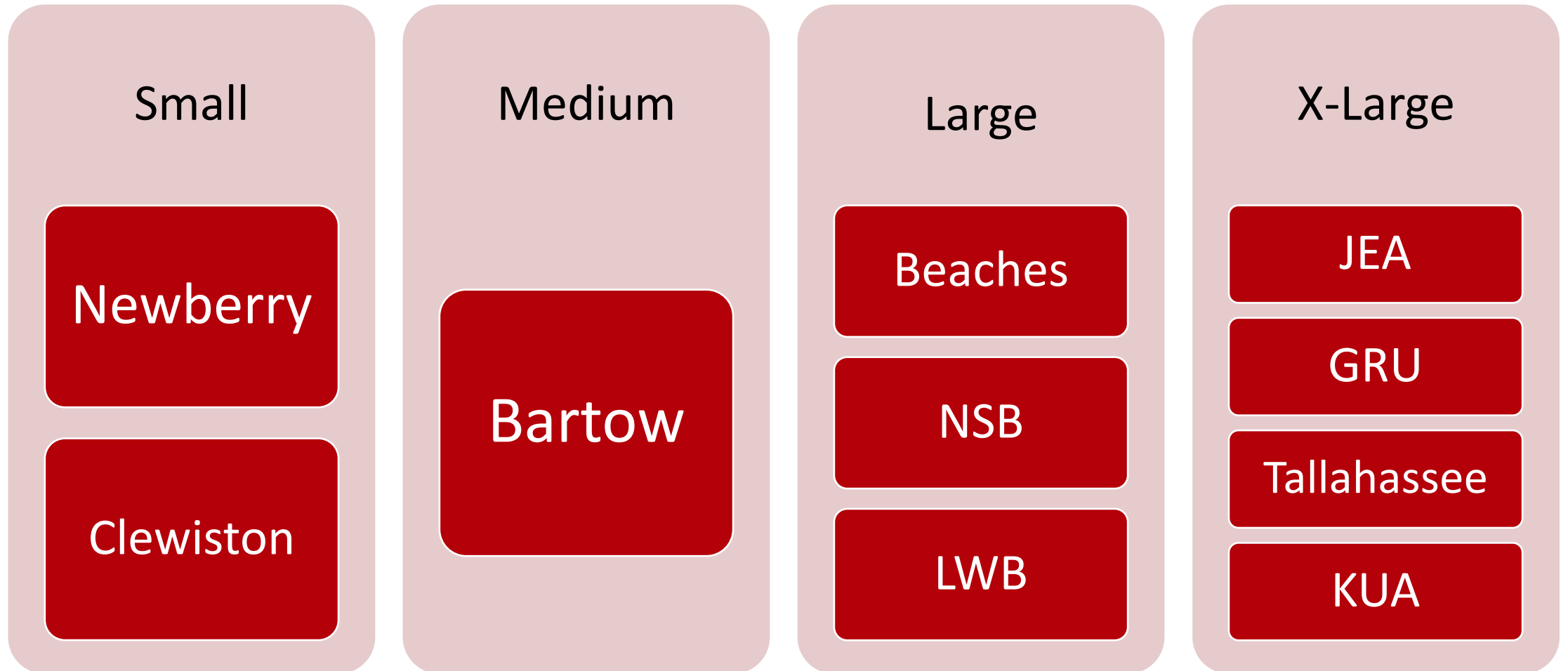
GRU (4Yrs)

KUA (12Yrs)

OUC (5Yrs)

Florida Public Power Reliability Awards

Duration (SAIDI) Improvement Awards, Equal To Or Greater Than 10%



**AGENDA ITEM 6 – INFORMATION
ITEMS**

**b. Iran Hostilities, Data Centers and
Federal Energy Policy**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**



6b – Iran Hostilities, Data Centers & U.S. Energy Policy Update

Policy Makers Liaisons Committee

April 15, 2026

Iran Hostilities Impacting Global Oil & Natural Gas Prices

U.S. Oil Prices Up But Not Natural Gas, Shale Revolution Protects U.S.

- Iran hostilities closed Strait of Hormuz - 20% of global oil & LNG move to market
- Global and U.S. oil and gasoline prices have increased 30-40%
- Global LNG (natural gas) prices have increased ~100%
- U.S. natural gas prices dropped 5-10% since hostilities
 - U.S. power markets unaffected so far from Iran events
- Last 15 years, U.S. became largest oil & natural gas producer via Shale Revolution
- U.S.'s 100% production growth during "Revolution" tempers U.S. impact
 - U.S. imported ~50% of oil/products in 2010, today it exports 5% of its supply
 - U.S. imported ~12% of natural gas in 2010, today it exports 25% of its supply
 - U.S. energy trade moved from \$275 B deficit 2010 to \$125 B surplus in 2025

Middle East, Persian Gulf, Strait of Hormuz & Kharg Island



Whatever Getaway You Are Looking for, There's A Hilton for You. Book Online Now. [Open >](#)

Closure of Strait of Hormuz Impacts Both Oil & Nat. Gas

20% of Global Oil & LNG Strait Flow, Strategic Reserves for 20 Days

- Global oil production ~105 million barrels per day (mb/d)
 - Middle East production of ~20 mb/d
 - 14 mb/d stranded due to Strait closure
 - Largest oil producers – U.S. 22, Saudi Arabia 11, Russia 10 & Canada 6 mb/d
- Global LNG market is ~55 Bcf/day of natural gas
 - ~20% or 12 Bcf/d of LNG flows through Strait
 - Largest LNG suppliers – U.S. 15, Australia 11 and Qatar 11 Bcf/day
- Largest imports of oil and natural gas – India, China, Japan, South Korea & EU
- Global (IEA) & U.S. strategic oil pledges to cover 20 days of shortfall
- China had 100 days of oil stored
- U.S. to increase LNG export capability by 5 Bcf/d in 2026

Data Centers Fundamentally Changing Industry

Need for More Power Clashing with Costs and Acceptance

- **Data Center Demand Increase Real** – Regions seeing 3-4% YOY energy sales growth. AI transmission interconnection queues 7 years long
- **Existing Generation Cannot Meet Demand Increase** – Short-term capacity prices rising by factors of 5-10
- **States & Feds Requiring Data Centers Bring Own Power (BYOP)** – Working to protect existing customers from rate increases while serving new data centers
- **Customer Concerns Over Cost Increases** – Residential cost increases up 9.5% YOY Jan., but many Northeastern states up 13-18% - higher natural gas & capacity shortage
- **Data Centers Moving Around Utilities** – Building on-site generation (BYOP) to avoid long interconnection waits providing main/back-up supply, co-locating with IPPs
- **Data Centers Need to Build Trust & Community Relations** – Green power push led to lack of reliable power & communities need benefits – DeSantis & Sen. Sanders

Administration Taking Action for Low-Cost & Reliable

DOE Ordering More Generation to Stay On

- Concern 60,000 MW reliable power plants were to close in 4 years while only adding 22,000 MW – Wind/solar plan would not serve load plus data centers
- Administration Pushing to Keep On More Low-Cost & Reliable Generation
 - 6 plants (4,300 MW) received DOE Sec. 202 orders - 1 gas, 1 oil and 4 coal
 - Several other plants deferred closure without SEC 202 Orders
 - Of 7,000 MW of gas/coal supposed to close in 2025, less than 1,000 MW did
- Plants needed last summer and during Fern
- DOE action to prevent fuel oil shortage during Fern in Northeast
 - Only one operator could "back" oil barge into Boston Harbor to resupply
- Northeast Fern week – Nat. Gas/Diesel +50%, Coal +24%, Nuke flat, Wind –40% YOY
- Expect several more Sec. 202 Orders for summer as capacity margins shrink

Winds of Change at Federal Level on Energy Policy

All Starting to Focus on Affordable and Reliable Energy/Power

- All types of generation suffering permit withdrawals – natural gas, wind & solar
- Power/energy costs becoming a major concern
- 6 Northeast D Governors support Constitution natural gas pipeline pushed by DOE
 - DOE worked to not embarrass Governors
- SPEED Act reform continues despite Adm. withdrawal of off-shore wind permits
 - Helped focus need for all fuel sources to support permit reform
- SPEED Act areas of focus – NEPA, Clean Water and Historic Protection Act (NHPA)
 - Shot clock to review and grant permits
 - Shot clock for judicial review after permit issued
 - Address "standing" – Must be directly impacted – Enviro. Challenges too broad
 - Transmission – only true energy cost savings, must increase reliable generation

AGENDA ITEM 7 – MEMBER COMMENTS

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

AGENDA ITEM 8 – ANNOUNCEMENTS

- a. Next Meeting – July 16, 2026 at the FMEA
Annual Conference**

**Policy Makers Liaisons Committee Meeting
April 15, 2026**

AGENDA ITEM 9 – ADJOURN

**Policy Makers Liaisons Committee Meeting
April 15, 2026**