

December 3, 2025

Mr. David Mills
Chair, PJM Board of Managers
2750 Monroe Blvd.
Audubon, PA 19403

Dear Chairman Mills,

Over the last three months—since your August 8 letter initiating the Critical Issue Fast Path (CIFP) process—the PJM community has sought to find consensus solutions to integrate large load additions (LLAs) into our shared grid while ensuring reliability and affordability. The November 19 Members Committee votes—in which all twelve proposals were overwhelmingly rejected—make clear that this effort has fallen well short of consensus, and more importantly, has failed to provide both the reliability and affordability that our communities rely on from PJM.

As representatives of millions of PJM customers, we actively engaged in the Critical Issue Fast Path (CIFP) process on Large Load Additions (LLAs) at multiple points, including in collaboration with other stakeholders. All our engagement has been intended to protect customers from excessive price increases in future Base Residual Auctions, to secure grid reliability and to develop new mechanisms that incent new generation. Given the Members' votes, we are greatly concerned that we will shortly end up with the least desirable outcome: forthcoming auctions that yield extraordinarily high prices, but neither guarantee reliability nor lead to a corresponding increase in generation, and provide no clear regional rules for LLA integration.

PJM's proposal is clearly insufficient to prevent this outcome, offering only incremental improvements to existing processes without meaningfully facilitating responsible LLA integration, or the much-needed increase in generation that is required in this moment. In short, settling for PJM's proposed solutions will assure neither reliability nor affordability for our region.

Given this serious concern, we write to urge the Board to take decisive action in its upcoming filing with FERC to guarantee that LLAs join the grid in a manner that does not produce significant price increases for existing customers or negatively affect the reliability of our region.

We are united in urging the Board to look beyond the PJM package to implement a solution that offers a secure path to ensuring both affordability and reliability. Without measures that protect consumers, the cost in next summer's auction could double from this July's record amount while still failing to ensure system reliability—that

outcome would be unacceptable. We look to you to ensure that our consumers do not face such extraordinary price increases by taking a moderate step: extending the current price collar for one further auction.

Given the lack of consensus on November 19, we both need you to act decisively to ensure new entry of much-needed supply and protect reliability, while also taking this concrete step to protect our constituents from further dramatic price spikes while deeper reforms are still underway. We intend to remain actively engaged on these issues, and will continue to work collaboratively with a range of stakeholders to advance the clear consumer interest in reliable power at the least cost.


Sincerely,



Governor Josh Shapiro
Commonwealth of Pennsylvania



Governor JB Pritzker
State of Illinois



Governor Phil Murphy
State of New Jersey



Governor Matt Meyer
State of Delaware



Governor Wes Moore
State of Maryland



Governor Glenn Youngkin
Commonwealth of Virginia