



# Update on PJM Offshore Wind Studies

Matthew Bernstein  
Senior Policy Advisor  
Presented to ISAC  
March 25, 2024

## Phase 1 Study Background

- Scenario study conducted in response to a [request from OPSI](#); an independent effort between PJM and interested state agencies
- **Five scenarios** created in collaboration with PJM's coastal states (short and long-term)
- **Goal** was to analyze and identify regional transmission solutions to accommodate the coastal states' offshore wind goals, as well as *all* PJM states' RPS requirements
  - Assessed the impact to the PJM transmission system and identified costs and location of upgrades (not cost allocation)
  - Study intended to be *advisory only*

## Phase 1 Study Conclusions

[Link to Report](#) (2021)

- Scenario results range from \$627.34m to \$3,213.14m
  - OSW injection totals range from 6,416 MW–17,016 MW
- Results demonstrated system impacts, identified network upgrades and upgrade costs for all scenarios, and opportunities for regional solutions
- Market efficiency analysis for the study's Scenario #1 demonstrated decreased gross load payments, especially for coastal states, among other benefits



# Recap - Proposed Phase 2 Offshore Wind Scenarios

Offshore Wind Scenarios (MW)							
Scenario	Delaware	Maryland	North Carolina	New Jersey	Virginia	Total OSW Capacity	
Study Year 2028*	1	-	2,022	-	3,906	2,640	8,568
	2	-	4,000	-	3,906	2,640	10,546
	3	800	2,022	-	3,906	2,640	9,368
Study Year 2035*	4	-	2,022	-	7,648	5,200	14,870
	5**	-	2,022	-	7,648	2,640	12,310
	6**	-	2,022	-	7,648	5,200	14,870
	7	-	8,500	-	7,648	5,200	21,348
	8***	-	-	-	-	-	0

\* Model all PJM state RPS targets as being met for scenario years 2028 and 2035.

\*\* Include only 9,000 MW of solar in Virginia for Scenarios 5 and 6.

\*\*\* Neither PJM nor any PJM state were assuming that the offshore wind policy goals of the PJM states will not be achieved. Scenario #8 was to serve as an opportunity to separate the transmission impacts of offshore wind in comparison to other renewable resources that will be developed in pursuit of state policies.

- **New Jersey SAA 2.0**

- Analysis to be performed in 2024 on an additional 3,500 MW of OSW capacity in New Jersey.
- PJM anticipates opening a competitive window in summer 2024 to address the needs from the SAA 2.0 analysis.

- **Maryland OSW Informational Analysis**

- PJM requested by Maryland PSC to conduct analysis on Maryland's 8,500 MW OSW target in response to the *POWER Act (2023)*; may lead to competitive solicitation for transmission solutions.

- **Delaware OSW Scenario Request**

- PJM requested by Delaware PSC and DNREC to assess the impacts of an additional 1,000 MW of OSW connecting into Delaware.

- As a result of the subsequent OSW scenario requests, PJM will not be conducting OSW Transmission Study: Phase 2 as a formal study.
- PJM will continue to work with New Jersey, Maryland and Delaware on their respective OSW efforts and analyze scenarios similar to what was requested as part of the Phase 2 study.
- Additional scenarios that consider OSW policies are expected to occur through PJM's proposed Long-Term Regional Transmission Planning (LTRTP) process.

SME/Presenter:  
Matthew Bernstein,  
Matthew.Bernstein@pjm.com

## Independent State Agencies Committee



### Member Hotline

(610) 666 – 8980

(866) 400 – 8980

custsvc@pjm.com