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FOR IMMEDIATE RELEASE

Federal Decision Raises New Questions About Data Center Forecasts, Utility Planning Assumptions

COLUMBUS, Ohio – The Ohio Manufacturers' Association (OMA) said a recent federal decision denying an AEP request tied to PJM's capacity market is intensifying scrutiny of utility load forecasts and how speculative projections are shaping real market outcomes.

The Federal Energy Regulatory Commission's ruling comes as Ohio manufacturers continue to warn that planning decisions based on unverified demand projections are driving capacity market outcomes and contributing to rising electricity costs for employers and families across the state.

OMA said the higher data center load estimate AEP submitted to PJM reflects tariff mechanics, not new customer demand, raising broader questions about how projections tied to tariff provisions are influencing market signals and long-term planning assumptions.

"AEP justified raising its estimate of data center load to PJM because of minimum demand provisions in its data center tariff, not because of increased demand," said OMA President Ryan Augsburger. "The widely cited 30 gigawatts of data center load has always been speculative. While AEP referenced that number in proceedings before the PUCO and in public messaging, it has never guided system planning and has not been reduced because the underlying forecast itself has not changed.

"To be direct, AEP has not decreased its load forecast. Available information suggests actual commitments may have declined following the January data center commitment deadline, yet updated figures have not been publicly released. Instead of adjusting projections to reflect verified demand, AEP increased its forecast to PJM based on tariff terms. That raises serious questions about the growing gap between paper forecasts and real load growth."

OMA said the decision underscores the need for greater transparency, independent verification and accountability when large load forecasts are used to justify billions of dollars in infrastructure or capacity decisions.

"Ohioans are being asked to pay for a future that exists on paper, not on the grid," Augsburger said. "Before customers are asked to fund new infrastructure or capacity, forecasts must be tested, transparent and accountable."

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The Ohio Manufacturers' Association is Ohio's largest statewide business association composed solely of manufacturers. Established in 1910, the OMA's mission is to protect and grow Ohio manufacturing. It represents manufacturers of all sizes in every subsector of the industry. Manufacturing is Ohio's largest economic sector, employing approximately 690,000 Ohioans and contributing more than \$138 billion annually to the economy. Visit ohiomfg.com, or follow us on [LinkedIn](#), [X](#), [Facebook](#) and [YouTube](#).

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