



2025 RTP Economic Analysis Update

Economic Analysis & Long-Term Planning Studies
Oct. 28, 2025

Summary

- ERCOT developed 2027 and 2030 **base cases** and **sensitivity cases** for the 2025 RTP economic studies based on 2013 weather year condition
 - Base cases: Large Loads with a signed Interconnection Agreement or an Officer Letter were included and PUCT approved Good Cause Exception applied
 - Sensitivity cases: only Large Loads with a signed Interconnection Agreement were included
- Texas 765-kV Strategic Transmission Expansion Plan (STEP) as proposed in the 2024 RTP was included in the 2025 RTP economic study base and sensitivity cases for the year 2030

Large Loads and Generation Updates

	Base Cases	Sensitivity Cases
Large Loads	- Large load profiles from 2024 RTP were used - Contracted loads were included at 100% and Officer Letter loads (OLLs) were adjusted accordingly [1] - OLLs were reduced to 55.4% - Data center OLLs are further reduced to 49.8% of the initial OLL reduction	- Large load profiles from 2024 RTP were used - Contracted loads were included at 100% and all OLLs were removed
Added Generation Capacity	Added from the May 2025 Generator Interconnection Status (GIS) report [2] - Planning Guide Section 6.9(1) - IA signed - FIS Completed - FIS Started (partial)	Added from the May 2025 Generator Interconnection Status (GIS) report - Planning Guide Section 6.9(1) - IA signed - FIS Completed (partial)

[1] https://www.ercot.com/files/docs/2025/06/17/2025_RTP_Load_Update_June_2025_RPG.pdf

[2] added in the order currently outlined in paragraph (5) of Planning Guide Revision Request (PGRR) 127

Comparison between Base Cases and Sensitivity Cases

Description	Unit	2027 Base Case	2027 Sensitivity Case	2030 Base Case	2030 Sensitivity Case
Coincident Peak Load	MW	110,123	101,896	123,559	109,593
Peak Net Load	MW	88,587	81,700	104,613	89,668
Non 6.9(1) Wind Added	MW	3,327	3,125	3,327	3,125
Non 6.9(1) Solar Added	MW	16,300	12,537	19,560	15,487
Non 6.9(1) Battery Storage Added	MW	21,645	11,240	25,708	13,337
Non 6.9(1) Natural Gas Added	MW	8,529	1,941	23,705	6,360
Total Non 6.9(1) Gen Capacity Added	MW	49,801	28,843	72,300	38,309

Questions

Send questions or comments to:

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Appendix

Base Case Generation Addition

2027 Study Year	Battery Storage (MW)	Natural Gas (MW)	Solar (MW)	Wind (MW)
Planned generators that have a signed IA	11,240	346	12,537	3,125
Planned generators that have completed FIS without IA signed	10,405	1,595	3,763	202
New generators that have started FIS without IA signed	-	6,588	-	-

2030 Study Year	Battery Storage (MW)	Natural Gas (MW)	Solar (MW)	Wind (MW)
Planned generators that have a signed IA	13,337	1,422	15,487	3,125
Planned generators that have completed FIS without IA signed	12,371	4,938	4,073	202
Planned generators that have started FIS without IA signed	-	17,345	-	-

- A total of 49,801 MW and 72,300 MW of non 6.9(1) planned resources were added to 2027 Base Case and 2030 Base Case, respectively.

Sensitivity Case Generation Addition

2027 Study Year	Battery Storage (MW)	Natural Gas (MW)	Solar (MW)	Wind (MW)
Planned generators that have a signed IA	11,240	346	12,537	3,125
Planned generators that have completed FIS without IA signed	-	1,595	-	-

2030 Study Year	Battery Storage (MW)	Natural Gas (MW)	Solar (MW)	Wind (MW)
Planned generators that have a signed IA	13,337	1,422	15,487	3,125
Planned generators that have completed FIS without IA signed	-	4,938	-	-

- A total of 28,843 MW and 38,309 MW of non 6.9(1) planned resources were added to 2027 Sensitivity Case and 2030 Sensitivity Case, respectively.