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2026 Economic Study Update

Economic Analysis & Long-Term Studies
Nov. 3, 2026

Agenda

The 2026 Economic Study

Demand and Generation Capacity

Preliminary Top Congested Constraints

Next Steps

The 2026 Economic Study

- ERCOT created the 2026 Economic Study cases for 2028 and 2031 study years
- The 2026 Economic Study uses the 2025 RTP 2028 and 2031 summer peak cases as the starting cases.
- Financial assumptions were presented in April RPG meeting
- Weather year selection, natural gas price forecast, and modeled interfaces and their limits were presented in August RPG meeting

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Demand and Total Generation Installed Capacity

Demand and Generation	2028	2031
Demand (GWh)	968,897	1,154,721
Peak Load (MW)	142,229	163,123
Generation (GWh)	1,019,421	1,205,221

Installed Capacity	2028	2031
Total installed capacity (MW)*	317,273	355,662
Battery (MW)	63,508	67,442
Natural Gas (MW)	95,356	121,025
Solar (MW)	86,899	94,264
Nuclear (MW)	5,175	5,175
Hydro (MW)	557	557
Wind (MW)	53,466	55,447
Coal (MW)	12,312	11,752

* New generators were added per PGRR127

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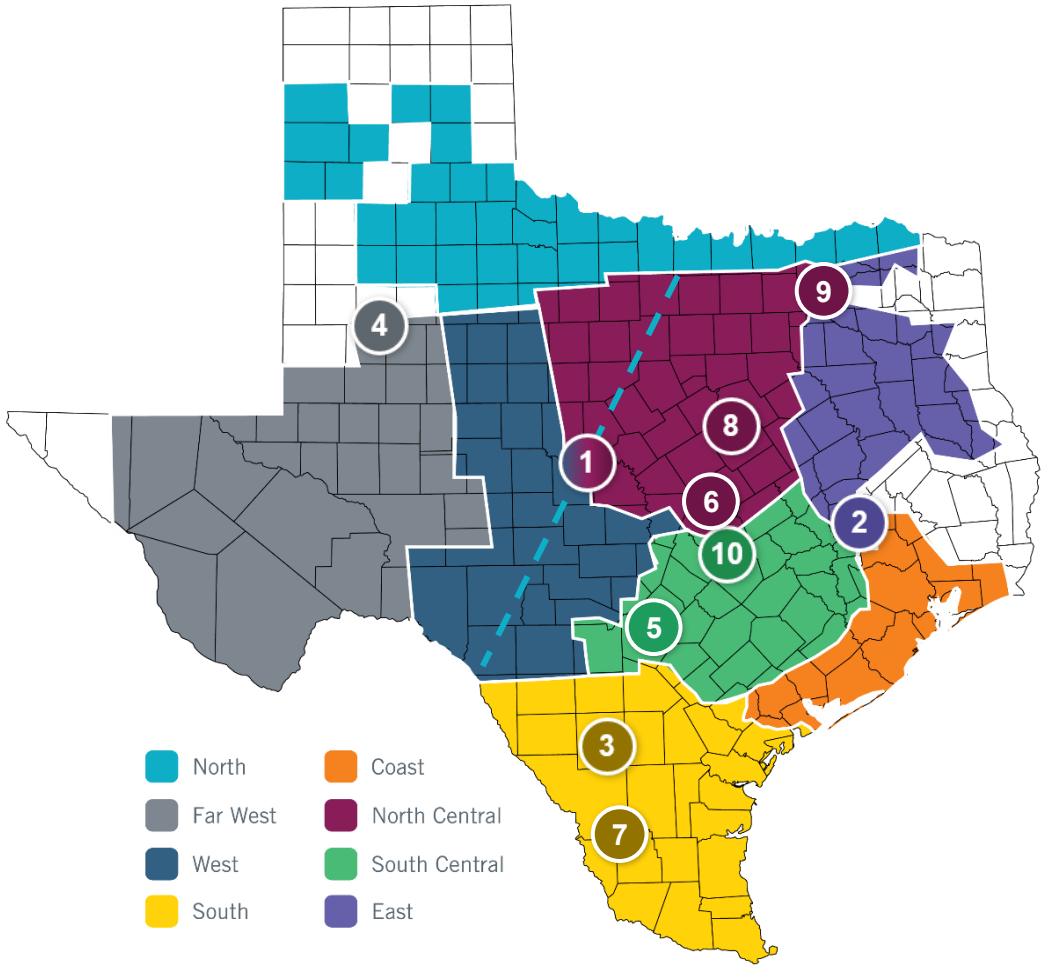
Next Steps

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Preliminary Top Congested Constraints

- Total congestion rent is $1.9 Billion for 2028 and $1.7 Billion for 2031 Base Case

		Congestion Rent* (M$)	
Index	Constraint	2028	2031
1	West Texas Export	121	241
2	North – Houston Interface	92	183
3	Tilden – Fowlerton 138-kV Line	78	128
4	Farmland – WETT Long Draw 345-kV Line	18	112
5	Bergheim – Antler 138-kV Line	48	59
6	Killeen Switch – Salado Switch 345-kV Line	88	2
7	Bruni 138/69-kV Autotransformer	66	23
8	Whitney – TNMP Lake Whitney 138-kV Line	39	42
9	Cash Switch – Sandy Ranch 345-kV Line	11	61
10	Walleye – Blake 345-kV Line	18	53



*Congestion rent indicates areas of the system where economic transmission projects may be beneficial. It is not an indication of whether a project to reduce specific congestion would or would not meet the ERCOT economic planning criteria. Sorted based on sum of congestion rent in 2028 and 2031 cases.

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Next Steps

- ERCOT is evaluating the potential economic transmission projects for key congestions observed in the Base Cases
- The results will be presented in future RPG meetings

Questions/Comments?

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