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# Editorial: An electricity crisis is looming for Illinois. Is anybody paying attention in Springfield?



Gov. JB Pritzker talks with reporters at an event on Tuesday, Sept. 10, 2024 in the Austin neighborhood of Chicago. (Brian Cassella/Chicago Tribune)



By **THE EDITORIAL BOARD** | Chicago Tribune

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In 2021, Illinois enacted a comprehensive clean energy law mandating the closure of all coal- and natural gas-fired power plants by 2045. As part of the Climate & Equitable Jobs Act, one of Gov. JB Pritzker's signature legislative accomplishments, a large number of gas-fired facilities were to be shuttered by 2030.

At the time, there were warnings from industry and others that the intermediate 2030 mandate would jeopardize electricity reliability in the state. With Illinois then producing more power than it consumed, Pritzker and the many environmental groups that backed the law said such predictions were alarmist and off-base.

Just three years later, it appears the alarmists were right, and Pritzker and the green lobby were wrong.

Payments to power generators in return for their promise to produce to their capacity when demand is highest — as established via an auction overseen by PJM Interconnection, the grid manager for a large swath of the U.S. from northern Illinois to the mid-Atlantic — are set to soar more than 800% and will raise all our electric bills beginning next June.

That charge is embedded in the rates users pay for power and is in addition to the cost for the electricity itself. In effect, it is akin to an insurance premium — in this case, a payment each month to plant owners for their promise to deliver when the need arises.

In the northern Illinois territory served by Commonwealth Edison, average residential electric bills will increase by \$15 per month beginning in June due to this effect alone, according to ComEd. That increase will be significantly more pronounced for single-family homes, since ComEd's averages are skewed lower than in less urban areas by the large number of Chicago apartment dwellers it serves. (The blow will be softened a bit due to a ratepayer credit under state law of nearly \$4.35 per month from nuclear operator Constellation Energy Group.) All told, even after that credit, ComEd residential bills will rise by about 10.5% due to this charge alone — and that's before a possible ComEd power delivery rate hike.

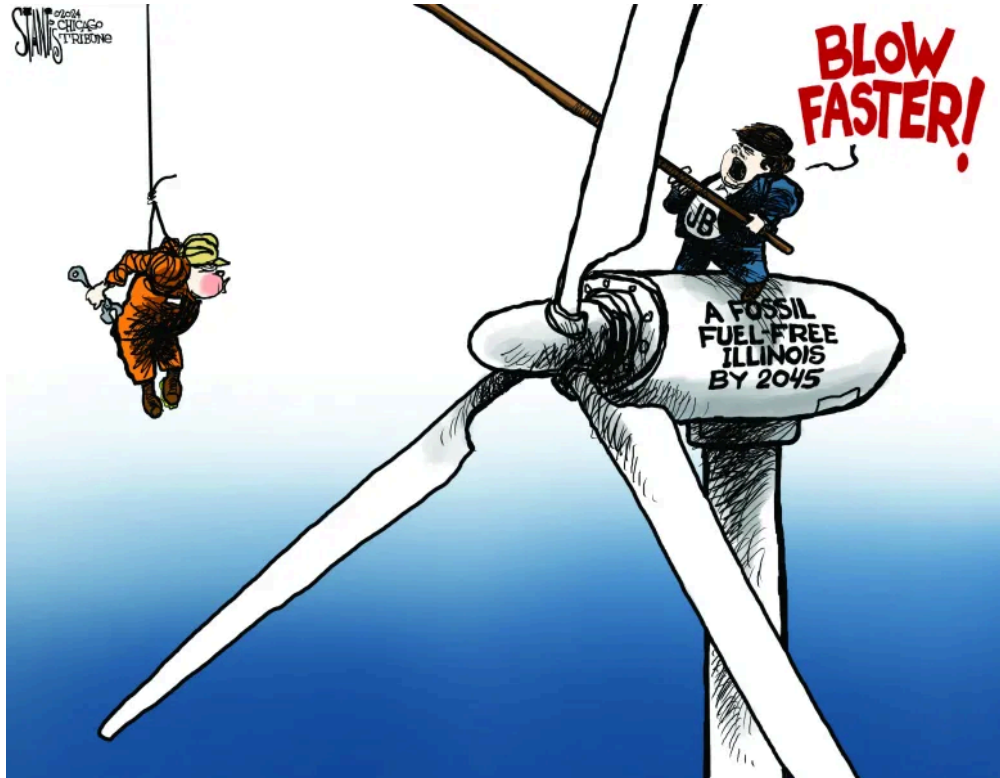
Get prepared for worse beginning in mid-2026.

Wall Street firm Morgan Stanley projects this insurance-like charge could be up to [2,200% higher than it is today](#), inflating average monthly ComEd residential bills by more than \$35 compared with current charges. We'll know how bad the damage is in December when PJM conducts its power-generator auction for the year from June 2026 to May 2027.

The unprecedented spike in these "capacity" charges isn't an accident. Simple supply-and-demand realities are the reason. Many fossil fuel power plants have closed in recent years, because of environmental rules and market conditions. And the growth in renewable power facilities such as wind and solar isn't making up enough of the difference.

The problems are not limited to northern Illinois. Central and southern Illinois, which fall under the purview of multi-state grid manager Midcontinent Independent System Operator, will be about 50% short of the capacity to keep the lights on during highest-demand periods as soon as 2027, according to MISO. That situation should be ringing alarm bells.

The shortage issue isn't as dire in northern Illinois. But the 2030 plant-closure mandates in Illinois' clean energy law, if unchanged, will threaten reliability during peak periods by 2030 in the Chicago area, according to PJM.



Editorial cartoonist Scott Stantis on Gov. JB Pritzker and energy shortages for Wed, Sept 17, 2024. (Scott Stantis/For the Chicago Tribune)

But the crisis could be upon northern Illinois even faster than that, because future demand is projected to soar even as supply falls.

Power-hungry data centers, the development of which a number of Chicago aldermen are encouraging within city limits as a way to generate more property tax revenue, are on the drawing boards. ComEd projects that new data centers throughout its territory easily could require four gigawatts of electricity. To put that in context, such an enormous amount alone would consume nearly the entire output of two of the five nuclear stations serving the region.

One might think policymakers in the state would be alarmed and preparing to act to fix the situation as soon as possible. But there's been precious little public discussion to date. A coalition of companies lobbying for state legislation to subsidize construction of energy storage facilities — essentially large battery storehouses that can hold power produced by intermittent sources such as wind and solar for several hours so that the juice can be deployed when most needed — has been sounding the alarm in Springfield, to no avail as of yet.

The political risk for Pritzker in particular is acute. The governor surely understands that future rolling blackouts due to a state law he championed — however well-intentioned — will result in harsh voter backlash. The Illinois Commerce Commission is scheduled to report on the coming capacity crunch sometime next year.

Lawmakers don't need to wait for that study. We know enough already for doing nothing not to be an option.

The General Assembly should begin work in earnest in next year's session on a comprehensive plan to forestall these calamities. The battery storage industry's proposal should be part of the discussion. But the more important issue to address also will be the knottiest politically.

It's becoming clearer all the time that the 2030 deadlines are unrealistic and need to be made more flexible. Backsliding on the law's gas plant-closure mandates is anathema to environmental groups, who surely would fight hard against such an effort and likely would criticize any Democratic "friends" who consider such a thing. But gas-fired "peaker" plants, which can rapidly fire up and just as rapidly turn off, for many years have been the most critical resources to keep the lights on when the temperatures soar (or plummet). They remain critical.

The decarbonization of power production, in Illinois and elsewhere in the U.S., is well underway. Very few in the power industry itself are fighting for the long-term preservation of fossil fuel plants. Public backing for clean power and addressing climate change is strong, but nothing will undermine that support more quickly than blackouts.

*Submit a letter, of no more than 400 words, to the editor [here](#) or email [letters@chicagotribune.com](mailto:letters@chicagotribune.com).*

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