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ISO New England Operations and Gas Electric Coordination

Market Trends Forum 2026

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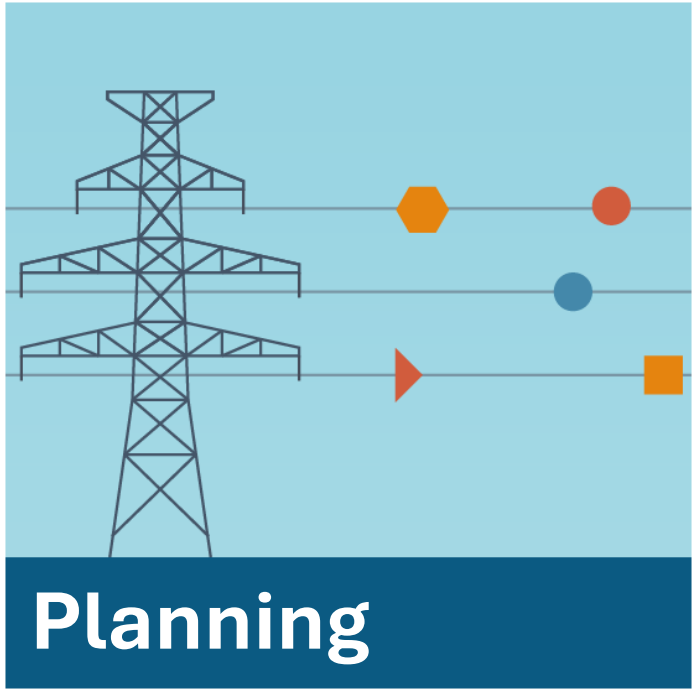
ISO New England Performs Three Critical Roles to Ensure Reliable Electricity at Competitive Prices

Coordinate and direct the flow of electricity over the region's high-voltage transmission system

Design, run, and administer the billion-dollar markets where wholesale electricity is bought and sold



Study, analyze, and plan to make sure New England's electricity needs will be met over the next 10 years

Generation and Demand Resources Are Used to Meet New England's Energy Needs

- Nearly **400** dispatchable generators in the region
- **Nearly 30,000 MW** of generating capacity
- Approximately **14,000 MW** of proposed generation in the ISO Queue, mostly wind, storage, and solar proposals
- Roughly **7,000 MW** of generation have retired or will retire in the next few years
- Nearly **3,600 MW** of demand resources with obligations in the Forward Capacity Market*, including energy efficiency, load management, and distributed generation resources

* In the Forward Capacity Market, demand-reduction resources are treated as capacity resources.

Weather Drives Regional Demand

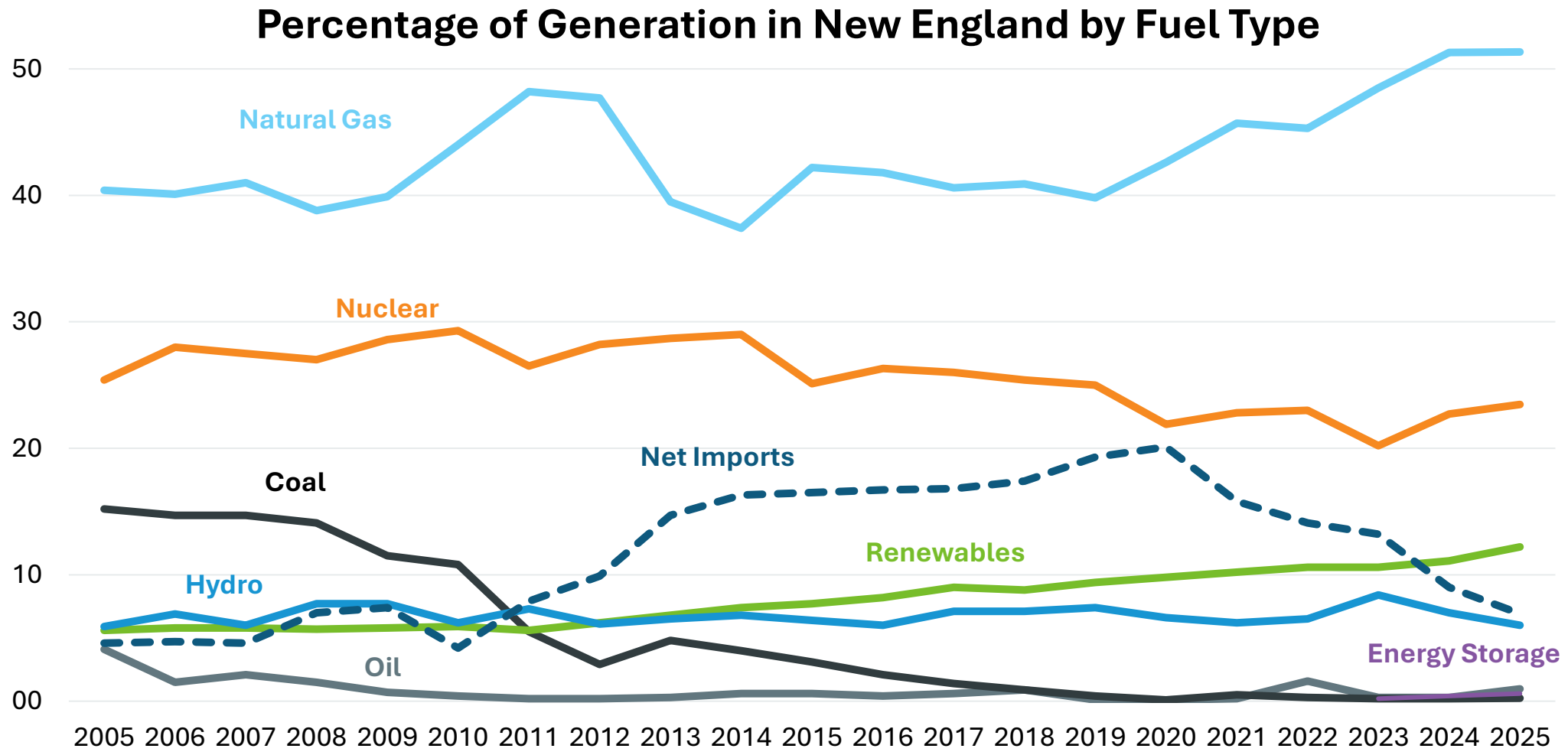
- New England is a **summer-peaking system**; heat and humidity drive demand
  - Summer peaks average ~25,600 MW
- Region anticipates shift to **winter-peaking system** with the electrification of heating demand
  - Winter peaks average ~21,000 MW

ISO New England Top Demand Days

Summer
28,130 MW
Aug. 2, 2006

Winter
22,818 MW
Jan. 15, 2004

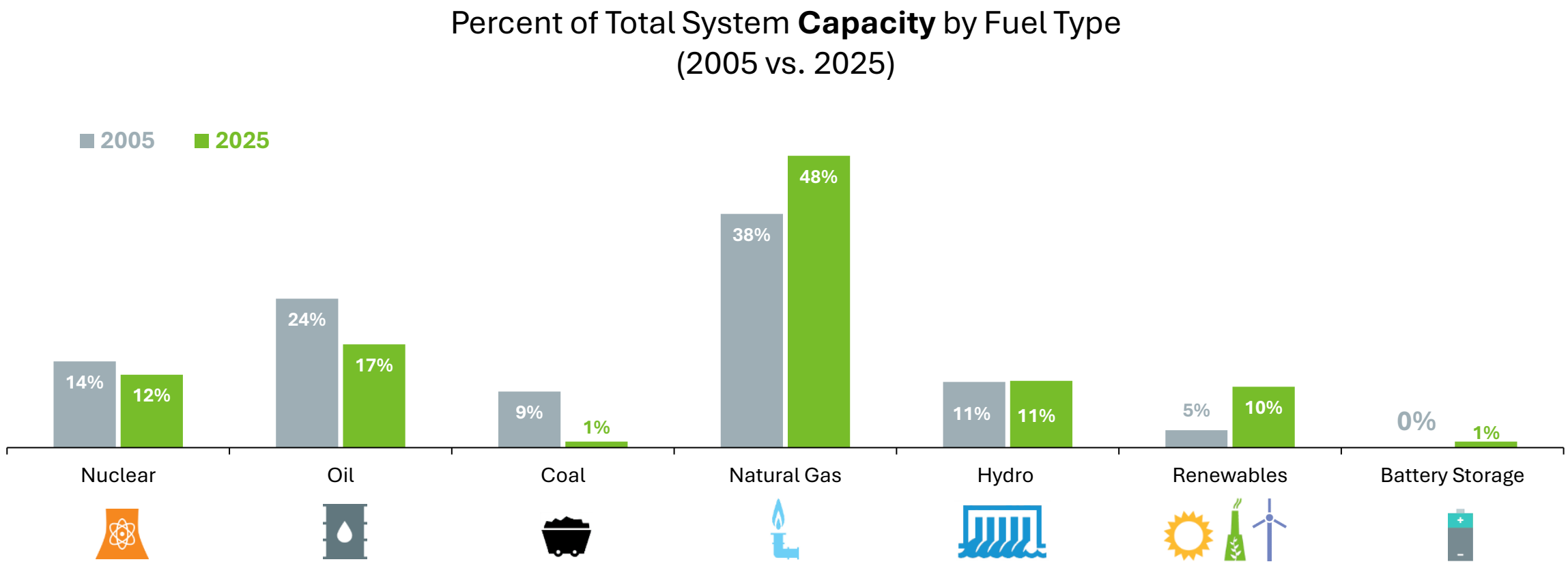
Changes in the Energy Mix Over Time



Source: ISO-NE Net Energy and Peak Load by Source. Electric generation within New England; excludes imports and behind-the-meter (BTM) resources, such as BTM solar.

Changes in the Resource Mix Over Time

The resources making up the region's installed generating capacity have shifted

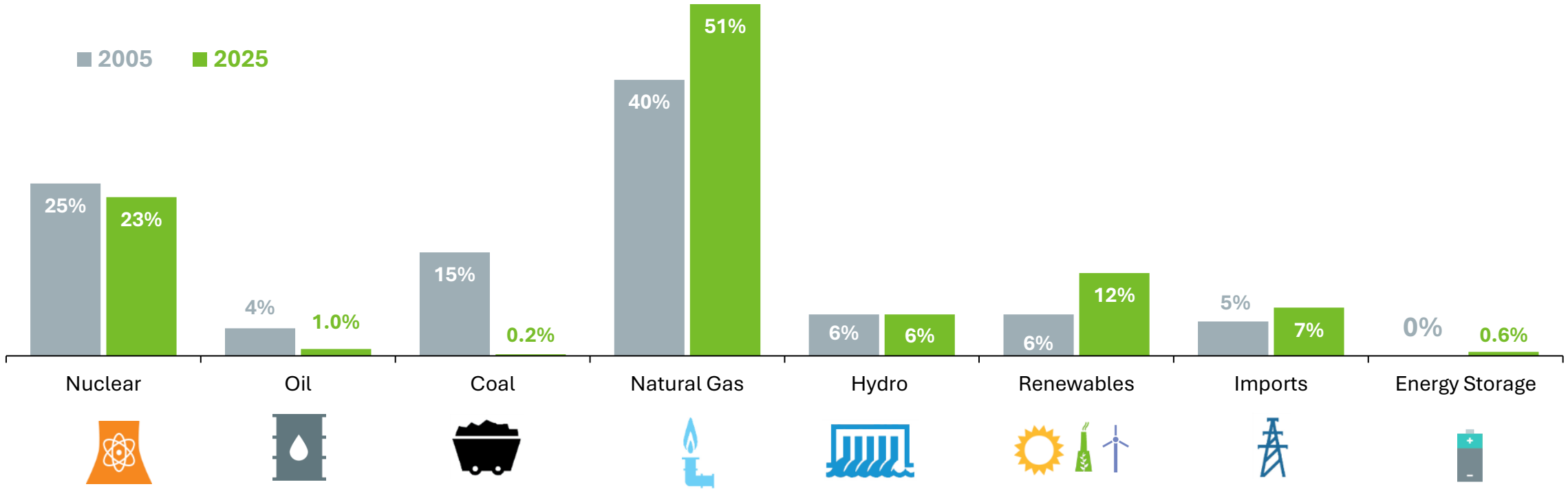


Source: ISO New England 2025-2034 Forecast Report of Capacity, Energy, Loads, and Transmission (2025 CELT Report) (May 2025) Summer Seasonal Claimed Capability (SCC) Capacity and ISO New England 2005-2014 Forecast Report of Capacity, Energy, Loads, and Transmission (2005 CELT Report) (April 2005) Summer SCC. Renewables include landfill gas, biomass, other biomass gas, wind, grid-scale solar, municipal solid waste, and miscellaneous fuels. The 2005 values reflect capacity as of January 1, 2005.

Changes in the Energy Mix Over Time

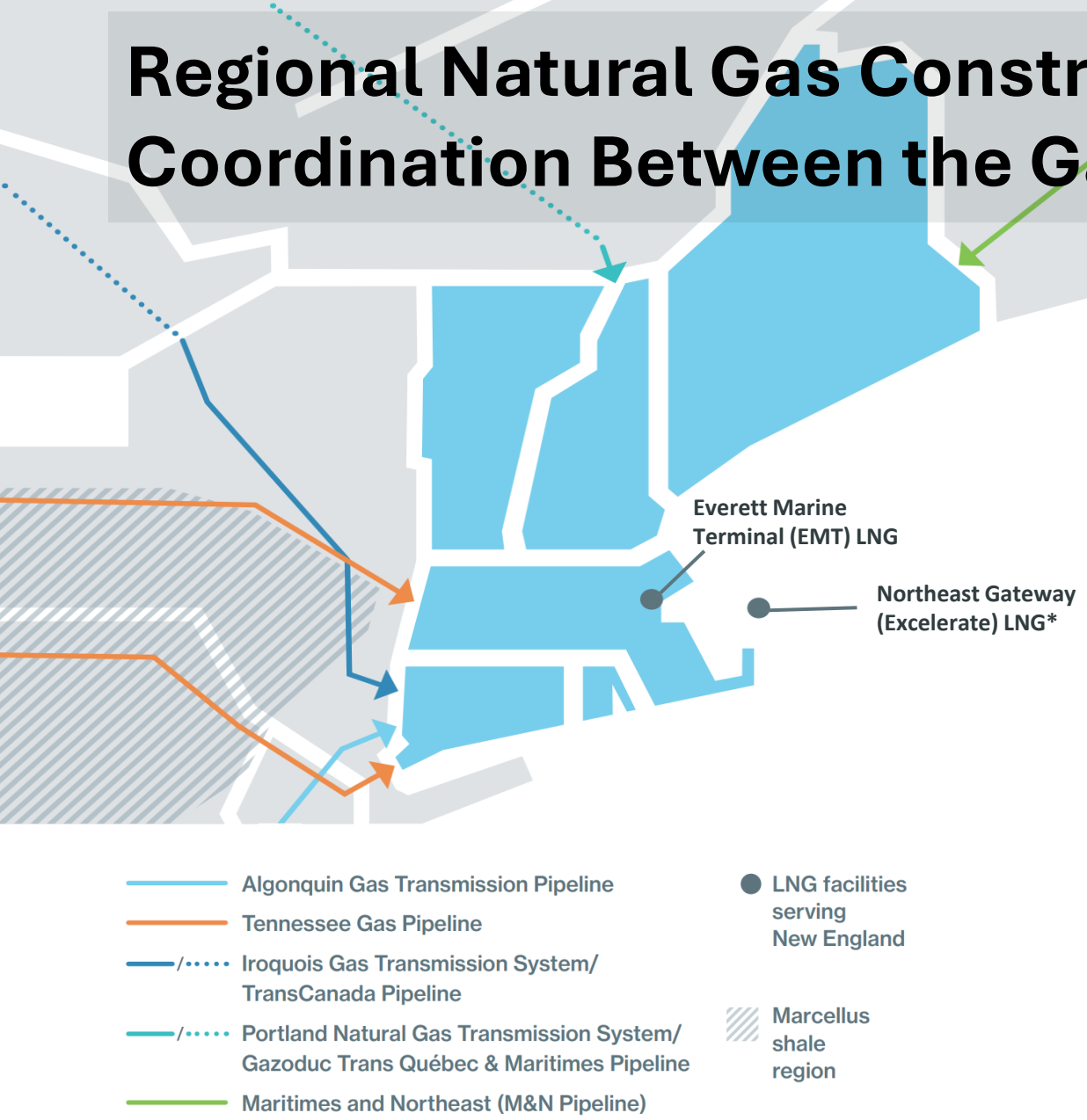
The fuels used to produce the region's electric energy have shifted as a result of economic and environmental factors

Percent of Total **Electric Energy** Production by Fuel Type (2005 vs. 2025)



Source: ISO New England Net Energy and Peak Load by Source; data for 2025 is preliminary and subject to resettlement
Renewables include landfill gas, biomass, other biomass gas, wind, grid-scale solar, municipal solid waste, and miscellaneous fuels.
This data represents electric generation within New England; it does not include imports or behind-the-meter (BTM) resources, such as BTM solar.

Regional Natural Gas Constraints Necessitate Close Coordination Between the Gas and Electric Industries

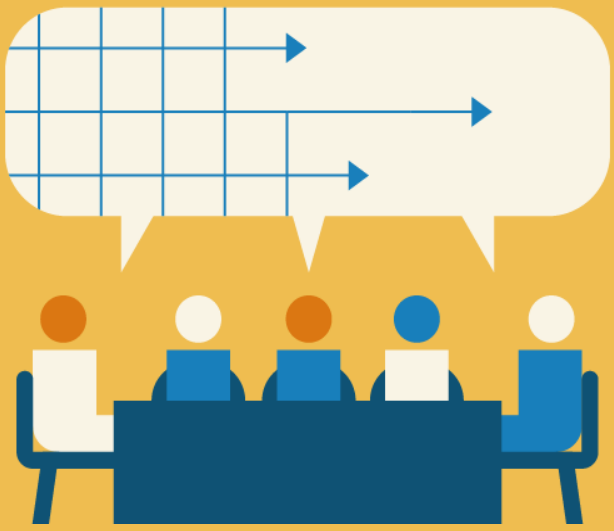


- Sources of natural gas to the west are constrained during cold weather
- LNG injections from the east help counter pipeline constraints
- Vaporized LNG can reach many gas-fired resources since the gas flows are counter to the prevailing pipeline constraints
- Mystic Units 8 & 9, previously fueled by EMT, retired in mid-2024

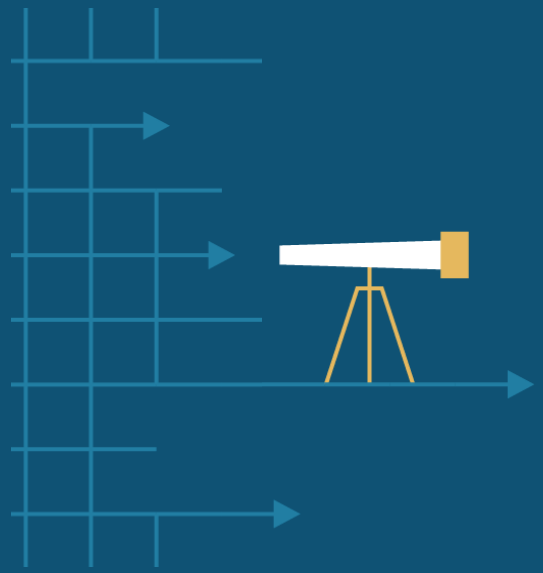
* Excelerate is only available when a Floating Storage Regasification Unit (FSRU) is docked at the buoy system.

ISO-NE's Long History of Gas-Electric Coordination

- New England has a long history of coordination between gas pipeline and electric system operators
- **Direct Communication:** ISO staff has direct communication with the gas control of each interstate natural gas pipeline and communications can take place between operators of each system, as needed
- **Situational Awareness:** ISO uses pipeline bulletin board data and generator schedules to enhance situational awareness and to identify potential concerns
- **Outage Coordination:** ISO actively works to coordinate pipeline and generator outages on a real-time and forward-looking basis (up to 6 months out)



ISO-NE Has Extensive Engagement with Industry and Government Entities on Gas-Electric Coordination



- North American Electric Reliability Corp. (NERC) working groups
- ISO-RTO Council Electric Gas Coordination Task Force
- Electric/Gas Operations Committee (EGOC) collaboration with the Northeast Gas Association (NGA)
- North American Energy Standards Board (NAESB) Gas Electric Harmonization Committee
- FERC Technical Conferences (e.g., New England Gas-Electric Forum

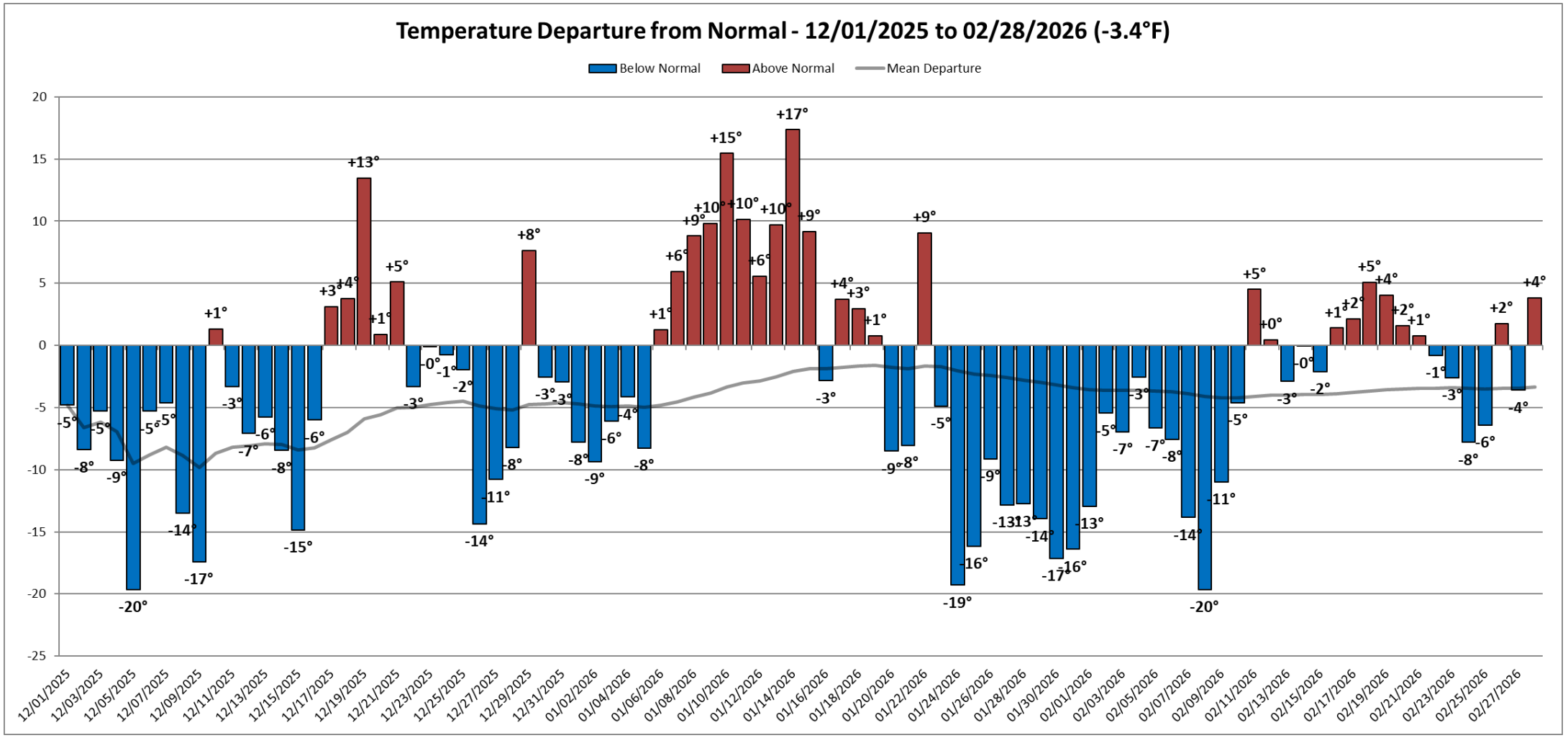
Winter 2025/26 - a record-setting season

Coldest winter in 20 years

Highest energy demand since 2014

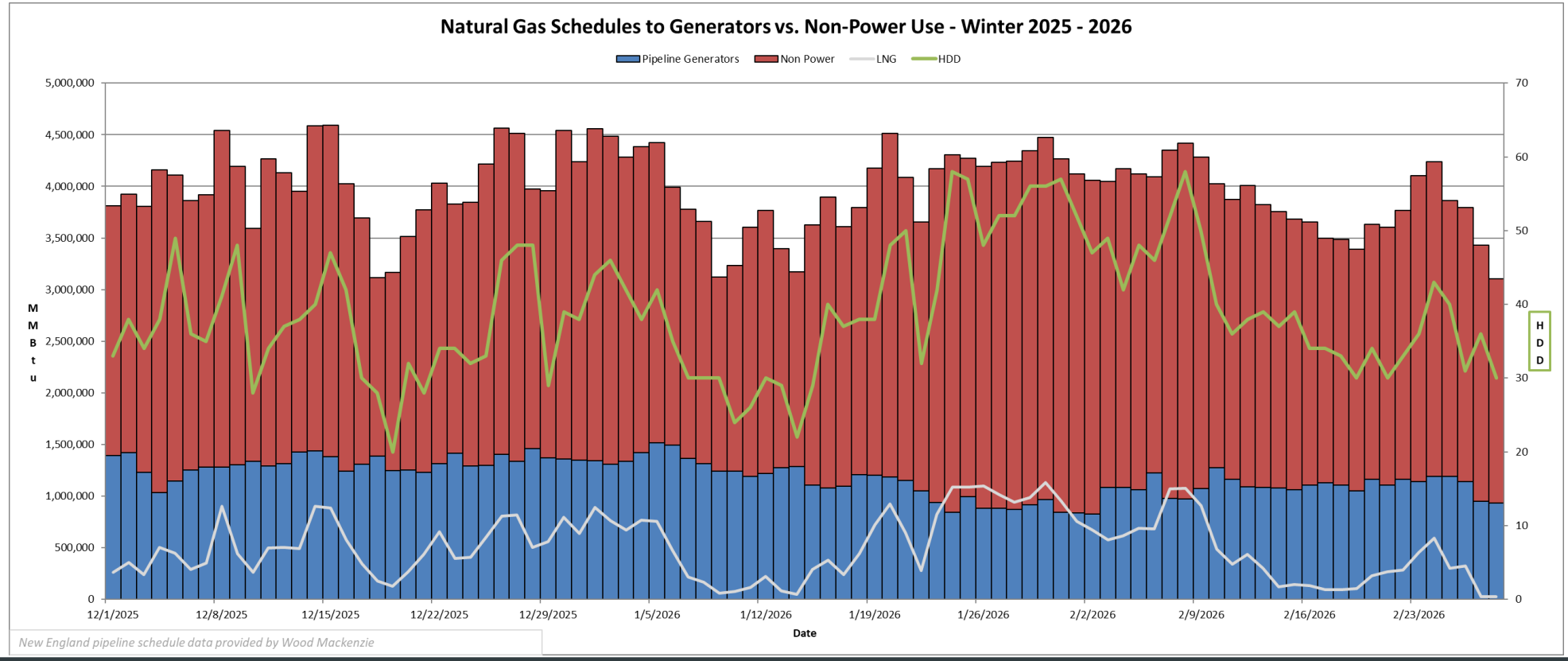
Record energy market values

Average temperature was 3.4°F below normal



Natural Gas Demand – Winter 2025/2026

- Scheduled LNG vaporization to the pipelines was ~45.6 Bcf, significantly higher than previous 5-year average of ~16.6 Bcf



Key Takeaways

New England is an energy-constrained region and has significant operational experience with gas-electric interdependencies and coordination; ISO New England is a leader in gas-electric coordination

Analyses of gas-electric systems and extreme weather events across the country often point to the need to strengthen gas-electric coordination

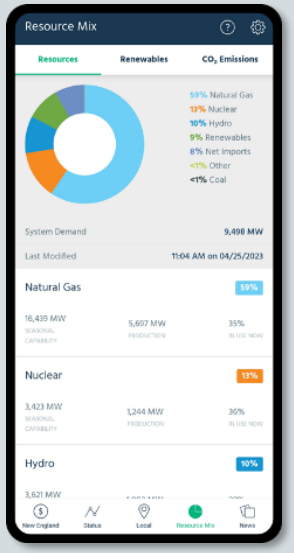
The electric and gas systems are operated separately and fall under different regulatory structures, but they make up a larger energy system

ISO New England has built strong relationships with operators of the interstate gas pipeline system and has developed tools to enhance our situational awareness of the gas system

Questions?

Download the ISO to Go App

ISO to Go is a free mobile application that puts real-time wholesale electricity pricing and power grid information in the palm of your hand



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Log on to ISO Express

ISO Express provides real-time data on New England's wholesale electricity markets and power system operations