

## The MegaWatt Minute

Week of June 2<sup>nd</sup>, 2025

- [\*\*AEP Ohio Files for Rate Increase\*\*](#)

**Summary:**

AEP Ohio has filed a proposal with the Public Utilities Commission of Ohio (PUCO) seeking approval to raise residential electric rates by approximately 2.9% starting in 2026. The increase would add around \$6.76 to the average monthly bill. The utility cites investments in grid modernization, vegetation management, and system reliability as key drivers behind the request. The filing is part of AEP's Electric Security Plan IV, which lays out its strategy for meeting future energy needs and infrastructure demands over a four-year period.

**Impact:**

For One Power, the proposed increase could influence how industrial customers evaluate behind-the-meter strategies—especially if rate hikes extend to commercial and industrial classes in future proceedings. AEP's framing around grid investments may also offer insights into how legacy utilities position infrastructure spending relative to reliability and clean energy mandates. Watching PUCO's response to this case could inform engagement strategy in Ohio and neighboring jurisdictions where similar filings are expected.

**Timeline or Relevant Dates:**

PUCO approval is pending; if accepted, new rates would take effect in 2026 under the next Electric Security Plan cycle.

- [\*\*Ohio Utilities Push for Last-Minute Clean Energy Rollbacks in HB15 Settlements\*\*](#)

**Summary:**

As Ohio's omnibus energy legislation, House Bill 15 (HB15), heads toward a final vote, utilities have inserted new settlement language that could dilute existing clean energy provisions. According to Canary Media, the backroom additions include vague language that might allow utilities to shift ownership structures and reduce support for customer-sited solar and energy efficiency programs. Clean energy advocates warn that these amendments could undercut earlier bipartisan progress, including sections that would have advanced distributed generation, virtual net metering, and community solar.

**Impact:**

For One Power, the evolving language in HB15 is a reminder of how quickly energy legislation can shift under utility pressure—particularly in the final stages of negotiation. While the bill still contains reforms relevant to permitting and grid access, weakened distributed energy sections could slow demand for solar-adjacent solutions in Ohio. The broader takeaway is that even modest clean energy wins in legislative text remain vulnerable to quiet rollbacks unless closely tracked through the committee and amendment process.

**Timeline or Relevant Dates:**

Final vote on HB15 is expected as early as this week. Settlement language was introduced in late May during pre-vote negotiations.

- [Republican Lawmakers Retry Bill to Bring Community Solar to Ohio](#)

**Summary:**

A bipartisan group of Ohio legislators has reintroduced a bill that would legalize community solar projects in the state, following a previous attempt that stalled in 2023. The proposed legislation would authorize a five-year pilot program capped at 1,500 MW, focused on small-scale solar installations that allow multiple customers—especially low-to-moderate income households—to share in the benefits of local solar generation. The program would prioritize brownfields and distressed sites, with oversight from the Public Utilities Commission of Ohio (PUCO).

**Impact:**

While the bill signals growing bipartisan interest in solar access, it may not affect One Power's core industrial customer base—at least not immediately. The pilot is targeted at residential and small commercial users. However, it could influence broader grid planning, interconnection rules, or land-use discussions over time. There's no immediate regulatory shift or market impact, but the proposal is worth watching as a bellwether for how Ohio legislators are thinking about distributed generation and solar equity. Competitive pressure or infrastructure overlap could emerge if the pilot scales.

- [Trump Administration Nominates Laura Swett to FERC](#)

**Summary:**

President Trump has nominated Laura Swett, a former legal advisor at FERC and current White House official, to fill the commission seat vacated by Republican Mark Christie. Swett has regulatory experience with both electric power and natural gas infrastructure. If confirmed, FERC remains one seat short after former Chairman Willie Phillips departed in April. Energy policy analysts, including those at the free-market R Street Institute, say the nomination signals the Trump administration's intent to exert greater direct influence over FERC decision-making, particularly to fast-track oil and gas project approvals.

**Impact:**

Swett's background in pipeline and transmission regulation may support a more streamlined permitting posture, especially for fossil fuel infrastructure. For One Power, her regulatory experience could bring procedural clarity to HV transmission approvals but may deprioritize clean energy market expansion. The incomplete five-member panel also means any 2-2 split could stall decisions on contested dockets—adding complexity to large-scale interconnection or market reform proposals in the near term.

**Timeline or Relevant Dates:**

Swett's nomination was announced June 3, 2025. Senate confirmation is expected later this summer. FERC's fifth seat—vacated by Willie Phillips on April 22—remains unfilled.

- [\*\*NEMA Pushes to Reshore Grid Equipment as Backlogs Drag Into Multi-Year Delays – Utility Dive\*\*](#)

**Summary:**

The National Electrical Manufacturers Association (NEMA) is urging policymakers to expand domestic production of grid equipment as backlogs for critical components like transformers and breakers persist into multi-year delays. A new report highlights that lead times for large power transformers now exceed 150 weeks, with similar bottlenecks affecting switchgear and protective relays. NEMA forecasts 2% annual electricity demand growth through 2050, which compounds the urgency. However, fully reshoring production could take years and require billions in investment, if it proves feasible at all, according to NEMA's CEO, Debra Boucher.

**Impact:**

For One Power, these prolonged lead times pose planning and procurement risks—especially for HV substations or system upgrades tied to Megawatt Hubs or Managed HV contracts. The call to reshore manufacturing could open new supplier relationships in North America, potentially improving timeline reliability. Until then, project timelines must continue to account for multi-year delays on key equipment, and early procurement strategies remain essential. Clients with inflexible buildout deadlines may require contingency designs.

**Timeline or Relevant Dates:**

NEMA's report was released May 28, 2025. Current transformer backlogs average 150+ weeks; no improvement projected without policy and manufacturing shifts.

- [\*\*Trump Pushes to Save Michigan Coal Plant Amid Utility Retirement Plans – Detroit Free Press\*\*](#)

**Summary:**

President Donald Trump has publicly urged Consumers Energy to reverse its plan to retire the coal-fired Campbell plant in Michigan, claiming that keeping it open is essential for

grid reliability and job preservation. The appeal comes as the utility seeks Michigan Public Service Commission (MPSC) approval for a revised long-term energy plan that still includes the plant's closure by 2026. While Trump's comments carry no formal authority, they signal the increasing politicization of utility resource planning—especially in swing states like Michigan.

**Impact:**

The Campbell plant debate illustrates how political rhetoric could introduce uncertainty into Integrated Resource Plans (IRPs) and utility schedules, particularly for coal retirements. If similar dynamics surface in other jurisdictions, developers like One Power may see delays in grid upgrades or interconnection timelines due to contested resource transitions. The episode also underscores the strategic importance of tracking IRP proceedings and local regulatory sentiment, especially in states with active federal election campaigns or polarized energy debates.

**Timeline or Relevant Dates:**

Campbell plant closure is scheduled for 2026. Consumers Energy's revised IRP is currently under review by the MPSC.

- [\*\*Maryland Solar Siting Bill Sparks Backlash From Local Leaders and Activists – WBOC\*\*](#)

**Summary:**

A newly passed Maryland bill that streamlines permitting for solar projects has drawn sharp criticism from local officials and environmental groups, especially on the Eastern Shore. The bill grants state agencies more authority to override local zoning rules to facilitate solar development on farmland and rural properties. Critics argue this undermines local land-use control, risks overdevelopment in sensitive areas, and prioritizes utility-scale projects at the expense of community voices. Supporters say the policy is necessary to meet the state's ambitious climate targets.

**Impact:**

For developers like One Power, the Maryland legislation could serve as a model—or cautionary tale—for how state-level efforts to accelerate solar deployment interact with local resistance. In regions where permitting is slow or fragmented, preemptive policies may streamline project timelines, but could trigger public backlash that can lead to litigation or future policy reversals.

**Timeline or Relevant Dates:**

The bill passed in May 2025 and is expected to take effect later this year, pending implementation guidance from the Maryland Public Service Commission.

- [\*\*Trump Administration Cancels Sunnova's \\$2.92 Billion Loan Guarantee – Reuters\*\*](#)

**Summary:**

The Trump administration has canceled a \$2.92 billion loan guarantee awarded to Sunnova Energy by the U.S. Department of Energy's Loan Programs Office. The loan, originally approved in 2023 under the Biden administration, aimed to support Sunnova's "Project Hestia"—a plan to deploy rooftop solar and battery storage systems for underserved households. Administration officials argued the program was wasteful and misaligned with their energy priorities. Sunnova stated the project had not yet drawn on any funds and would reassess upcoming plans in light of the announcement.

**Impact:**

While symbolic at this stage, the move signals heightened political vulnerability for DOE-backed clean energy financing. For developers relying on federal loan guarantees, the threat of political reversals may affect investor confidence, particularly for residential and distributed energy projects with long ramp-up timelines. Larger institutional players may pivot toward projects with bipartisan appeal or accelerated build schedules to mitigate political risk. The move could also chill other loan guarantee applications in progress.

- [Sheep Take On Landscaping at Minnesota Solar Farm – CBS News](#)

**Summary:**

A Minnesota solar farm has turned to sheep to manage vegetation under and around its solar panels—offering a low-cost, sustainable alternative to mowing or herbicides. The practice, known as solar grazing, involves rotating flocks through rows of panels where they naturally trim grasses and weeds while fertilizing the soil. This solution not only helps maintain optimal panel efficiency by keeping vegetation low, but also supports local farmers, who are paid to bring their flocks on site.

**Impact:**

For developers like One Power, solar grazing presents a scalable, low-maintenance land management option that can reduce operating costs, support pollinator habitats, and foster local agricultural partnerships. This model could be replicated at future solar installations or in the open fields around wind turbines. It also aligns with broader environmental stewardship goals without requiring permanent staff or chemical treatments. Feasibility would depend on site-specific constraints and regional grazing partnerships but could offer both ecological and PR value.