

IRP Public Outreach

Virtual, Microsoft Teams

December 17, 2025

Consumers Energy

Count on Us®

Teams Webinar Logistics


Q&A


People


Raise

Q&A Panel: Submit questions here at any time. Moderators will navigate responses.

Polls: the Q&A panel will also be utilized for interactive poll questions

Raise: when prompted by the moderator, utilize the raise hand function. Moderator will call on participants in order of hands and will facilitate microphone access.

After the Webinar

Recording: Link will be uploaded to [Energy Supply Plan | Consumers Energy](#)

Resources: Expect slides, notes, or surveys via follow-up email

Support: Contact POBOXIRP2026@cmsenergy.com with Energy Supply Plan questions

Agenda

Integrated Resource Plan

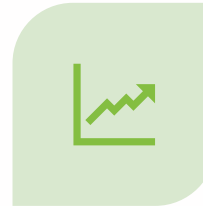
(IRP) Purpose: the June 2026 filing will include a 20-year outlook on the electricity generation sources we plan to use to meet projected energy demand, and how those assets will balance costs, system reliability, and commitment to the 2023 Clean Energy law requirements

Outcome: Answer questions and gather community feedback connected to Consumers Energy's Integrated Resource Plan (IRP)

4:30	Welcome Meeting Purpose & Norms <i>Jordan Walker, Manager Community Engagement, Consumers Energy</i>
4:35	Integrated Resource Plan (IRP) Logistics <i>Sara Walz, Executive Director Strategic Planning, Consumers Energy</i> • What is an IRP? • Milestones and filing timeline • Community input findings
4:45	IRP Design and Customer Impacts <i>Sara Walz, Executive Director Strategic Planning, Consumers Energy</i> <i>Adam Moritz, Director Supply Planning, Consumers Energy</i> • Factors considered in developing IRP • Modeling scenarios and sensitivities
5:00	Attendee Questions & Answers
5:25	Next Steps Closing Remarks

What is an IRP?

20-year roadmap that outlines how we will reliably and responsibly meet our customers' energy needs into the future



- Load growth
- Electric vehicles
- Electrification

PROJECTED ENERGY DEMAND



- Resource Additions
- Plant Retirements
- New Technology

PLAN RELIABILITY



- Maintaining reliability while maintaining competitive rates
- Customer programs

CUSTOMER AFFORDABILITY



- Michigan Clean Energy Law
- Emissions

CLEAN ENERGY GOALS

2021 Integrated Resource Plan Set Us Up for Success

But our world has changed immensely since our last integrated resource plan

2021 Integrated Resource Plan



Phases Out Coal: Eliminates coal use by 2025



Net Zero: Targets net zero carbon emissions by 2040



Increases Renewables: $\geq 60\%$ Electric Supply from Sources that are renewable by 2040 (8000 MW solar)



Efficiency / Demand Response: Emphasizes energy efficiency and demand response programs to lower demand and reduce waste



Support for EVs: Aims to support 500,000 electric vehicles by 2030 through PowerMIDrive® program

New MI Energy Law



Interim Clean: $\geq 80\%$ of Energy served in Michigan must come from clean sources by 2035



100% Clean: All Energy served in Michigan must come from clean sources by 2040



Increases Renewables: $\geq 60\%$ Electric Supply sourced from renewables by 2035 (50% by 2030)



Increased Energy Storage: Sets a statewide energy storage target of 2,500 MW by 2030 (CE 850 MW)

Energy Market Changes



Inflation reduction act (IRA): provided tax credits for renewable and clean resources, reducing costs



Increasing renewables on the grid: greater amounts of intermittent resources being installed on the grid



Midcontinent Independent System Operator (MISO) Resource Capacity Credit: lower capacity credit given to intermittent resources

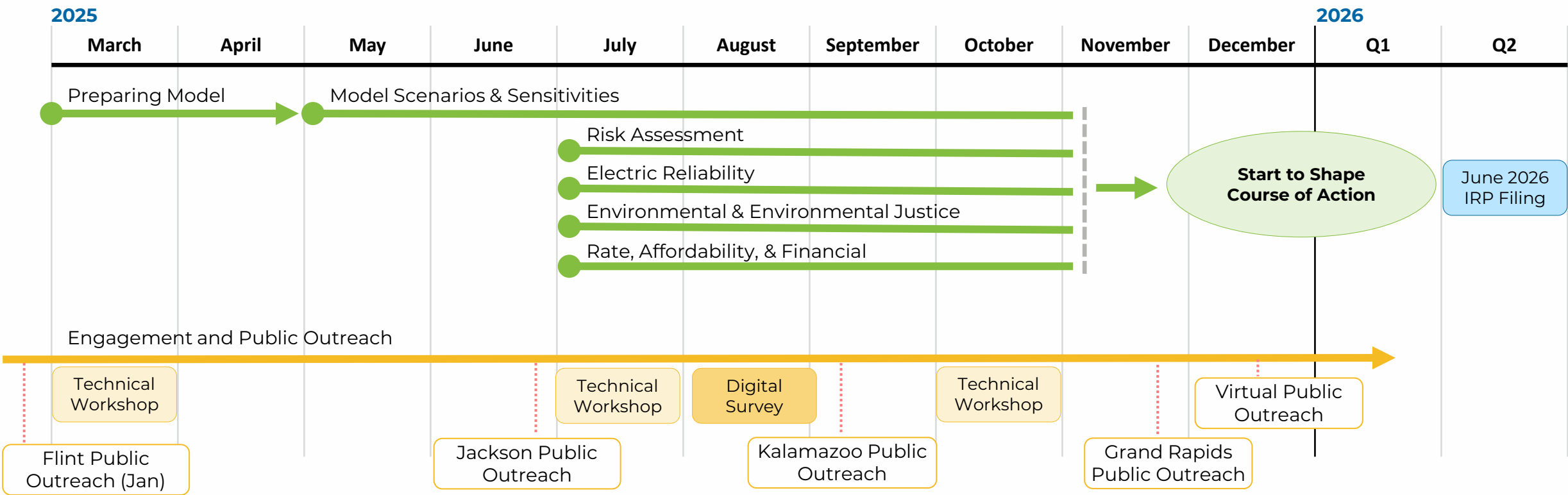


Increasing load: higher load forecasts across the MISO footprint due to high load customers like data centers



MISO Seasonal Construct: utility capacity requirements are based on seasons rather than only the summer peak load

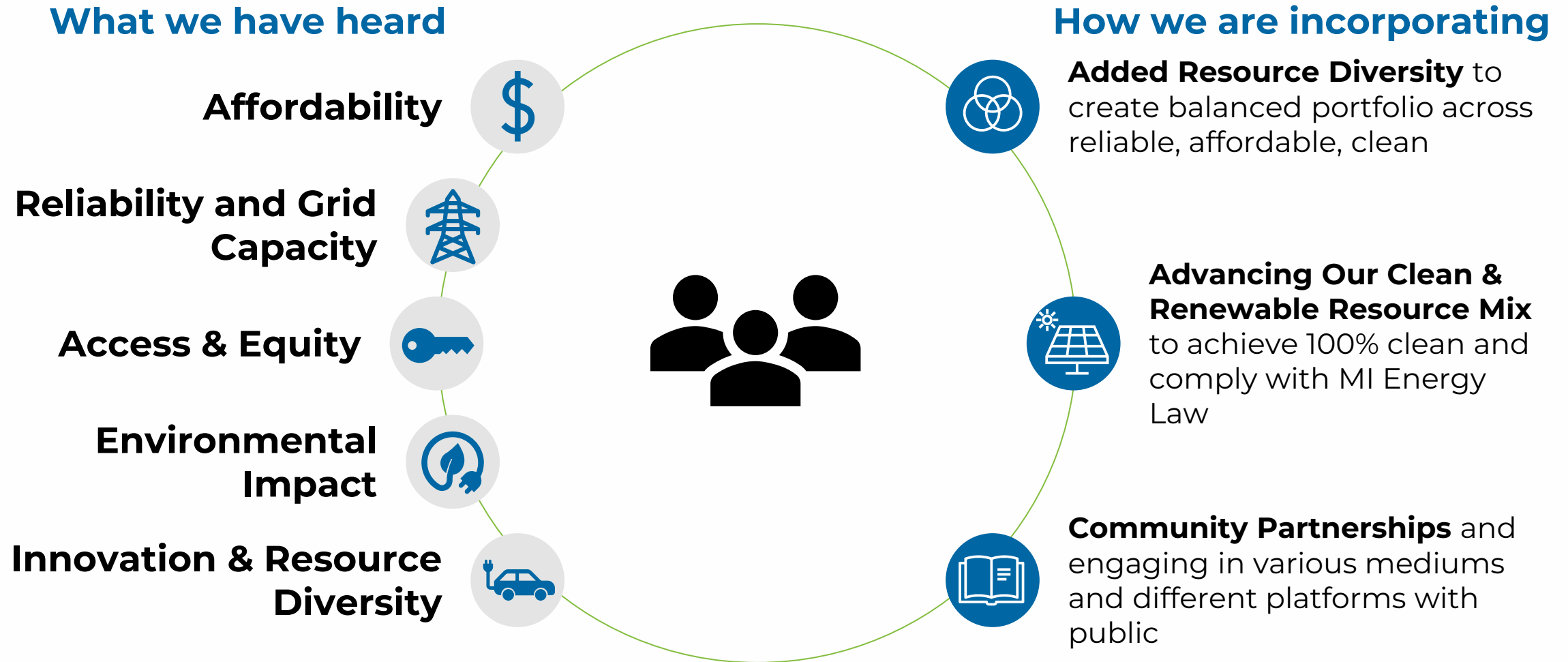
2026 Integrated Resource Plan (IRP) Timeline



Engagement and Public Outreach

- ✓ Collaboration continuing with Michigan Electric Transmission Company (METC) for transmission analysis
- ✓ Public outreach sessions held in January, June, September, November, and December (virtually)
- ✓ Technical workshops held in March, July, and October
- ✓ Digital IRP customer survey launched in August with over 1,300 responses

2025 Community Inputs



IRP Development and Economic Modeling

Priority	IRP Objective	Performance Metrics
 Safe & Reliable	Deliver capacity sufficient for MISO requirements and limit market dependence to minimize volatility to customers	• Capacity Position • Market Dependency • Market Usage • Loss of Load Expectation
 Affordable	Deliver competitive supply rates in the Midwest. Maintaining affordable solutions balancing capital deployment, the ability to earn on energy, and drive down total cost for our customers	• Net Present Value Revenue Requirement • Customer Rate Impact
 Clean & Equitable	Lead in clean and environmental justice communities, accelerating renewables and clean deployment to achieve targets	• Portfolio emissions • Carbon intensity • Renewable and Clean Targets - 2023 MI Energy Law • EJ community impact
 Regulatory	Utilize successful partnership with regulators and stakeholders to create a plan allows for a flexible and agile approach to deliver supply for load growth	• Compliance with law requirements & previous settlement agreements • Technical workshops • Engagement events

Consumers Energy Scenarios

1 Business As Usual (“BAU”)

Represents best-known projections for all input variables. Based upon load forecast including **signed contracts for new economic development**. Natural gas prices are assumed to remain low. Continued operation of CE’s existing **natural gas plants throughout the study period** is assumed, to support reliability. CE’s clean energy ambitions and Michigan’s 2023 energy law result in **continued renewable expansion**, with costs consistent with current trends.

2 Aggressive Load Growth (“ALG”)

Industrial load growth is more aggressive than BAU, both in Michigan and elsewhere in MISO, resulting in **slower than expected thermal unit retirements**, and **lower/slower decarbonization** across the country. Renewable generation expansion continues if economically selected.

3 Physical Climate Change (“PCC”)

Worse than expected climate change results in hotter/longer summers and colder winters. Public opinion supports accelerated retirement of existing thermal resources, potential opposition to **new unabated fossil fuel capacity**, and accelerated **electrification**. These drivers may require advancement of technology (**long-duration storage, nuclear**, etc.).

Consumers Energy Sensitivities

Categories



Load Growth



Federal, State, Regional Policy Change



Resource Evaluations



Natural Gas Price



Transmission



New Resource Alternatives

Electric Supply Roadmap

Leading Michigan's Energy Future

The Strength of Our Supply Strategy

A DIVERSIFIED PORTFOLIO

Having a range of assets in our electric supply portfolio will allow us to be affordable and reliable for our customers, while being clean and renewable.

**THE DIVERSITY OF OUR
PORTFOLIO IS OUR STRENGTH.**



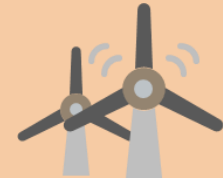
Natural Gas



Solar



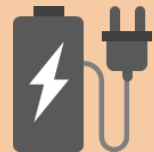
**Clean
Baseload**



Wind



Hydros



**Battery
Storage**

25 minutes

Questions?

Next Steps

Thank you for joining!

Summary

Integrated Resource Plan
(IRP) Community
Feedback Session

Meeting title	
Registration page views	567
Registered participants	107
Canceled registrations	3
Attended participants	64 (58 guests, 6 presenters)

Meeting duration 3h 51m 24s
Average attendance time 45m 34s



Recorded meeting will be posted online:
[IRP Virtual Public Outreach Dec 2025](#)



Follow up email with a link to materials and a feedback survey will be sent



Contact POBOXIRP2026@cmsenergy.com with any Integrated Resource Plan questions



Filing date intended for June 2026

Virtual Session Attendance

Name	First Join	Last Leave	In-Meeting Duration
Jordan B. Walker	12/17/25, 4:10:29 PM	12/17/25, 5:40:41 PM	1h 14m 50s
Dena M. Isabell	12/17/25, 4:10:56 PM	12/17/25, 5:24:30 PM	1h 13m 34s
Trisha D. Bloembergen	12/17/25, 4:16:15 PM	12/17/25, 5:25:02 PM	1h 8m 46s
Proudfoot, Paul (LARA)	12/17/25, 3:31:51 PM	12/17/25, 5:24:32 PM	1h 52m 41s
Adam J. Moritz	12/17/25, 4:18:30 PM	12/17/25, 5:25:02 PM	1h 6m 31s
Tom Weis	12/17/25, 4:20:52 PM	12/17/25, 5:24:39 PM	3m 32s
Sara T Walz	12/17/25, 4:23:16 PM	12/17/25, 5:24:34 PM	1h 1m 17s
Amy Grasman (Unverified)	12/17/25, 4:23:54 PM	12/17/25, 5:19:50 PM	55m 56s
Melinda Weis (Unverified)	12/17/25, 4:24:11 PM	12/17/25, 5:22:02 PM	57m 51s
Penny Payea	12/17/25, 4:25:32 PM	12/17/25, 4:48:30 PM	22m 58s
Commissioner Kochin (Unverified)	12/17/25, 4:25:54 PM	12/17/25, 5:17:16 PM	51m 22s
Art Jeannot (Unverified)	12/17/25, 4:25:57 PM	12/17/25, 4:59:18 PM	33m 21s
Jerry Becker	12/17/25, 4:26:21 PM	12/17/25, 5:24:26 PM	58m 4s
Poches, Greg	12/17/25, 4:26:32 PM	12/17/25, 5:24:42 PM	58m 9s
Robert D. Balzer	12/17/25, 4:27:26 PM	12/17/25, 5:24:30 PM	57m 3s
Heidemann, Zachary (LARA)	12/17/25, 4:27:40 PM	12/17/25, 5:24:30 PM	56m 50s
Andy Rienstra	12/17/25, 4:27:44 PM	12/17/25, 5:13:48 PM	46m 3s
Daniel O'Leary	12/17/25, 4:27:56 PM	12/17/25, 5:01:05 PM	33m 9s
Arnold, Amelia (LARA)	12/17/25, 4:28:03 PM	12/17/25, 5:24:30 PM	56m 27s
John McGarry (Unverified)	12/17/25, 4:28:12 PM	12/17/25, 5:25:15 PM	57m 3s
Heather Barta (Unverified)	12/17/25, 4:28:19 PM	12/17/25, 5:24:32 PM	56m 13s
Mix, Megan (LARA)	12/17/25, 4:28:52 PM	12/17/25, 5:24:29 PM	55m 36s
Audra Davis	12/17/25, 4:28:53 PM	12/17/25, 5:25:25 PM	56m 31s
Chiara Cameron-Wood (Unverified)	12/17/25, 4:29:01 PM	12/17/25, 5:12:26 PM	43m 25s
Francisco Humaran (Unverified)	12/17/25, 4:29:03 PM	12/17/25, 5:24:33 PM	55m 30s
Igor Piven	12/17/25, 4:29:11 PM	12/17/25, 5:24:31 PM	55m 19s
Jim Wierenga	12/17/25, 4:29:22 PM	12/17/25, 4:55:50 PM	26m 28s
Sarah A. Jorgensen	12/17/25, 4:29:22 PM	12/17/25, 5:25:00 PM	55m 37s
Jeffrey Dontz (Unverified)	12/17/25, 4:29:23 PM	12/17/25, 5:17:25 PM	48m 1s
Jacob J Stoll	12/17/25, 4:29:37 PM	12/17/25, 5:18:29 PM	36m 14s
Charlie DeVries	12/17/25, 4:29:46 PM	12/17/25, 5:24:35 PM	54m 48s

Name	First Join	Last Leave	In-Meeting Duration
Mary Bednar, Clinton Township (Unverified)	12/17/25, 4:30:24 PM	12/17/25, 5:24:41 PM	54m 16s
Grayson Moore	12/17/25, 4:30:29 PM	12/17/25, 5:23:43 PM	53m 13s
Simpson, Naomi (LARA)	12/17/25, 4:30:55 PM	12/17/25, 5:24:35 PM	53m 40s
Foster, Andrea	12/17/25, 4:30:58 PM	12/17/25, 4:55:12 PM	24m 14s
Lindsey Walker	12/17/25, 4:30:58 PM	12/17/25, 5:14:19 PM	43m 21s
Jim Gardner (Unverified)	12/17/25, 4:31:04 PM	12/17/25, 5:24:28 PM	53m 24s
Steve Wade (Unverified)	12/17/25, 4:31:04 PM	12/17/25, 5:18:39 PM	47m 35s
Catherine A. Wilson	12/17/25, 4:31:18 PM	12/17/25, 5:24:43 PM	53m 25s
Hutchinson, Sarah (LARA)	12/17/25, 4:31:35 PM	12/17/25, 5:24:37 PM	53m 1s
Jan O'Connell (Unverified)	12/17/25, 4:31:51 PM	12/17/25, 4:41:52 PM	10m
Clark, Aaron	12/17/25, 4:31:56 PM	12/17/25, 5:18:51 PM	46m 54s
Kristi Zimmerman	12/17/25, 4:32:08 PM	12/17/25, 4:54:53 PM	22m 44s
Michelle L. Mitchell	12/17/25, 4:32:17 PM	12/17/25, 5:24:29 PM	52m 11s
Christine Bischoff (Unverified)	12/17/25, 4:32:26 PM	12/17/25, 5:09:04 PM	36m 37s
Jeffrey B. Greer	12/17/25, 4:32:27 PM	12/17/25, 5:24:34 PM	52m 7s
Justin Stadt	12/17/25, 4:32:45 PM	12/17/25, 5:03:43 PM	21m 9s
Gallaher, Adam Bernard	12/17/25, 4:33:20 PM	12/17/25, 5:23:45 PM	49m
Dazy, Michael	12/17/25, 4:33:36 PM	12/17/25, 5:08:21 PM	34m 45s
Champion, Marcy (LARA)	12/17/25, 4:33:50 PM	12/17/25, 5:24:13 PM	50m 23s
Maria Sandow	12/17/25, 4:34:34 PM	12/17/25, 5:24:29 PM	49m 54s
David Hoekema	12/17/25, 4:35:15 PM	12/17/25, 5:24:34 PM	49m 19s
Aaron Newman (Unverified)	12/17/25, 4:36:42 PM	12/17/25, 5:06:56 PM	30m 13s
Jennifer Pierson (Unverified)	12/17/25, 4:37:00 PM	12/17/25, 4:49:57 PM	12m 56s
Andrew vanBaal (Unverified)	12/17/25, 4:37:34 PM	12/17/25, 5:24:32 PM	46m 57s
Pat McGinnis	12/17/25, 4:38:47 PM	12/17/25, 5:30:03 PM	51m 16s
Tamara H. (Unverified)	12/17/25, 4:39:43 PM	12/17/25, 5:22:57 PM	43m 14s
Mark Oppenhuizen (Unverified)	12/17/25, 4:41:09 PM	12/17/25, 4:54:39 PM	13m 29s
Jane Packard	12/17/25, 4:44:09 PM	12/17/25, 5:12:55 PM	28m 45s
Jan O'Connell (Unverified)	12/17/25, 4:44:47 PM	12/17/25, 5:24:34 PM	39m 47s
Gary Melow	12/17/25, 4:51:51 PM	12/17/25, 5:24:29 PM	31m 4s
Kenneth D. Johnston	12/17/25, 4:52:39 PM	12/17/25, 5:24:35 PM	31m 56s
Lloyd, Robert (Penske)	12/17/25, 4:58:14 PM	12/17/25, 5:17:39 PM	19m 25s
Aaron Newman (Unverified)	12/17/25, 5:07:43 PM	12/17/25, 5:08:53 PM	1m 9s

Q&A During Meeting

Question

David Hoekema • Dec 17

Susan Hoekema

I would like to know why, in the Aggressive Load Growth, accelerating renewables is not included to off-set retention of fossil fuel plants.

Answer this question

Question

Jerry Becker • Dec 17

2

Not seeing any polls?

Trisha D. Bloembergen Yesterday at 4:48 PM

Thanks for the feedback, Jerry. We are working through some technical difficulties and hope to make these available for your input shortly.

Dena M. Isabell Yesterday at 4:50 PM

The poll question has been added to the Q&A for everyone to respond.

Jerry Becker Yesterday at 5:10 PM

Where is nuclear in this plan?

Answer this question

Discussion

Dena M. Isabell • Dec 17

Welcome to the Integrated Resource Plan - Community Feedback Session. Please use this Q&A function to ask questions throughout the webinar.

Write a comment

Question

Jim Gardner • Dec 17

When will the JH Campbell plant finally be put to rest?

Dena M. Isabell Yesterday at 5:16 PM

Consumers Energy shared in a regulatory filing that the net financial impact to keep the Campbell plant open is about \$80 million since the first Department of Energy order May 23, through Sept. 30. Consistent with a prior Federal Energy Regulatory Commission order, costs to operate the Campbell plant will be shared by customers across the Midwest electric grid region – not solely by Consumers Energy customers. We will continue to comply with the federal order, and we will file a request later this year with FERC to recover costs.

see less

Answer this question

Question

Gallagher, Adam Bernard • Dec 17

What sources are considered "clean" baseload in the IRP and does the IRP model show increased expansion of those sources or not? Similarly, what direction does the IRP model for natural gas generation over the next 20 years?

see less

Trisha D. Bloembergen Yesterday at 5:19 PM

Our forward-looking supply strategy features a robust mix of flexible and affordable generation to ensure reliable energy when it's needed. This includes maintaining, upgrading and potentially expanding gas-fired facilities to support reliability and future growth outlined in our next Integrated Resource Plan (IRP).

see less

Dena M. Isabell Yesterday at 5:21 PM

Clean baseload is considered: All renewables + fossil fuels with carbon capture, or nuclear. Our forward-looking supply strategy features a robust mix of flexible and affordable generation to ensure reliable energy when it's needed. This includes maintaining, upgrading and potentially expanding gas-fired facilities to support reliability and future growth outlined in our next Integrated Resource Plan (IRP).

see less

Answer this question

Question

Michelle L. Mitchell • Dec 17 • Edited

You enabled their mic but they have to turn their mic on from their end.

Answer this question

Question

Grayson Moore • Dec 17

Curious to hear more about reliability with increased demand from data centers, any improvements to electrical charging network, and any further underground plans.

Grayson Moore Yesterday at 5:18 PM

Great, thank you both for expanding on that!

Answer this question

Question

Dena M. Isabell • Dec 17

What else should be considered in planning for future electricity demand?

Answer this question

Question

Dena M. Isabell • Dec 17

Which of the following do you believe will have the greatest impact on future electricity demand in Michigan?

- Data centers
- Electric vehicles
- Building electrific...

see more

Dazy Michael Yesterday at 4:51 PM

Data centers

Commissioner Kochin Yesterday at 5:14 PM

Is there a plan to bury lines as lines are replaced or in conjunction w local municipalities as new construction is being done?

Answer this question

Post-Event Survey Results

Consumers Energy - Integrated Resource Plan:
Community Feedback Session, December 17, 2025

Start time	Completion time	What was your overall level of satisfaction with this event?	What did you like about the session and what could Consumers Energy do to make sessions like this better?	How can Consumers Energy best connect with community members when shaping future energy decisions?	What additional topics would you like to see covered in future virtual public offerings?	Which of the following do you believe will have the greatest impact on future electric load growth in Michigan?	What additional factors should we consider when modeling future electricity demand?	Which factor do you think should be prioritized most when selecting new energy resources?	As we consider energy resource options, how should affordability be balanced with reliability, sustainability, and meeting Michigan's clean energy law requirements?	Full name	Email address
12/19/25 12:52:56	12/19/25 13:01:21	5	The Consumers Energy December 17 feedback session was professional yet accessible, with excellent presenters and hosts.	This virtual format was an effective format for community partners to become informed and to have a venue to provide feedback. Thank you.	Climate scenarios were presented. It would be interesting to learn more about how CE's community and philanthropic giving is adjusted to reflect an interest in conservation, biodiversity and wetlands mitigation in its planning for infrastructure expansion.	Data Centers	None. You covered them.	Reliability ;Cost/Affordability;Community Impact;Flexibility/Adaptability;Reducing Carbon Emissions;Other;	After a period of rate increases, and high inflation impacting Michigan's consumers, affordability is the #1 concern.		
12/20/25 0:03:34	12/20/25 0:11:08	2	The information Consumers Energy shared was insightful. However, to improve the sessions, the technology needs to be used better. The unmute button did not work nor the chat button for me. It was frustrating not being able to ask questions. I have used Teams professionally for many years and have never seen that kind of problem before.	You could put notices in the electric bills of feedback opportunities. I only heard of the session on December 17 by an off-chance word of mouth.	I would like to see more specific plans of how CE is improving customer service, reducing costs, and moving to green energy. Strategy is nice to hear but more concrete plans would also be helpful.	Data Centers				Melinda Weis	mkweis22@gmail.com