THE YEAR THE GRID RAN OUT OF ROOM

Only Two Months Left in the 2026 Budget Year

What changed on the grid this year, what you can still act on before December 31, and why spring scope has to be decided at the same time.

GROOME INDUSTRIAL SERVICE GROUP • OCTOBER 2026 • 4 MIN READ

In mid-October, with much of the fleet in autumn maintenance, unseasonable heat pushed PJM into a supply shortage and the Department of Energy issued an emergency order directing additional generation and authorizing backup resources at data centers and industrial sites. Not in July. **In October, during outage season.**

That is the most useful fact of the year, because it says something no forecast does: the grid no longer has room for a normal maintenance season. Everything else that happened in 2026 points the same direction.

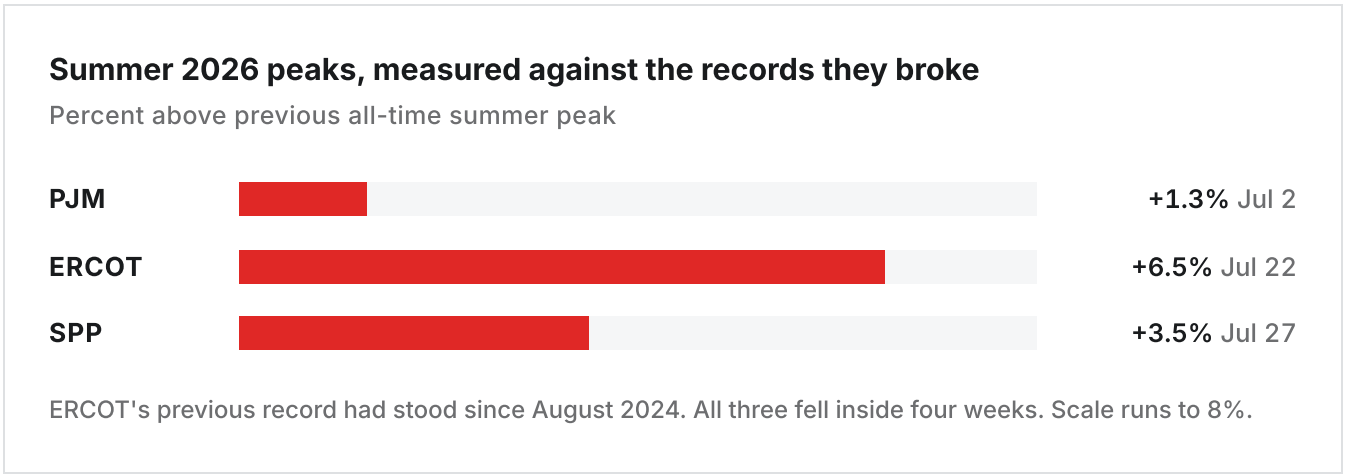
162.6 GW	$325	2031
PJM SUMMER PEAK	PER MW-DAY	NEXT TURBINE SLOTS
All-time record, July 2	At the PJM cap, third year running	OEMs booking four to five years out

Demand set records, and then kept setting them

Three RTOs broke their all-time summer peaks within four weeks of each other. These were not weather anomalies on a flat trend. EIA projects U.S. electricity consumption at roughly 4,268

billion kWh in 2026 and 4,391 billion in 2027 — back-to-back records following 2025's 4,195 billion — with data center and AI load the primary driver.

The practical translation for an operator: there are fewer and fewer hours in the year when your unit is not wanted.



The market repriced reliability — for the third year running

PJM's capacity auction for the 2028/2029 delivery year, held in July 2026, cleared at $325 per MW-day — the FERC-approved cap, across the entire footprint, for the third consecutive auction. The detail that matters more than the price: it procured 138,318 MW and still came up 6,831 MW short of the reliability requirement.

Demand cleared above supply at the maximum price the market is permitted to pay, which also puts the penalty exposure attached to non-performance at its own high-water mark. An outage during a performance assessment interval has never been more expensive.

No meaningful new supply is arriving this decade

The ordinary answer to a tight market is new build, and that answer is not available on the timeline anyone needs. GE Vernova's gas turbine backlog reached 116 GW at the end of Q2 2026 and is expected to approach 125 GW by year end; the company is taking reservations for 2031 deliveries. Siemens Energy and Mitsubishi are in the same position, all three booking four to five years out, with manufacturing expansion landing no earlier than 2030. Meanwhile coal

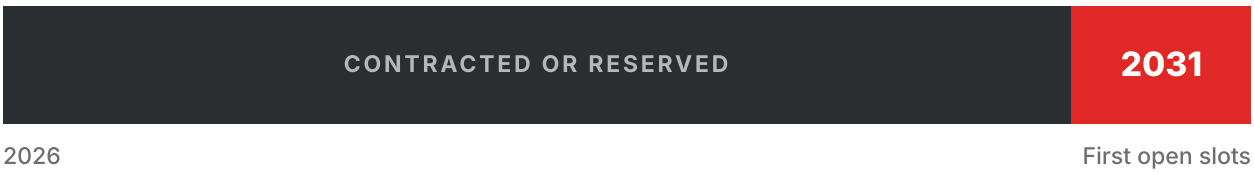
and older gas retirements have been deferred across multiple markets to hold capacity on the system.

Scarcity has pulled new suppliers in, and it would be a mistake to ignore them. Ansaldo took its first U.S. gas turbine order in more than thirty years — eight units for a Texas data center project, first deliveries in 2027. Doosan Enerbility has secured twelve U.S. machines, including seven 380 MW units for a technology company's data centers, delivering one a month from May 2029. Siemens Energy's chief executive reads the widening field as a response to unusual demand rather than a permanent restructuring of the supplier base.

None of it changes the arithmetic for a plant running today. That capacity is contracted before it is built, it is going into new data center projects rather than relieving the existing fleet, and the bulk of it arrives after 2029.

The turbine queue

Earliest uncommitted delivery slots at the major OEMs



New entrants are taking U.S. orders — Ansaldo from 2027, Doosan from 2029 — but those units are contracted to new data center projects, not to the operating fleet.

The effect is simple and uncomfortable: the fleet running in 2030 is substantially the fleet running today, well past its original design horizon and cycling harder than it was built to cycle.

> **The new capacity being built is already spoken for. Whatever reliability you need between now and then has to come out of the plant you already own.**

The regulatory picture changed — but not the part that touches your plant

On September 14, EPA finalized a partial repeal of the 2024 Carbon Pollution Standards, effective November 16, eliminating the greenhouse gas emission guidelines for existing fossil steam units along with the associated carbon capture and co-firing requirements.

It would be a mistake to read that as general regulatory relief. The repeal touches greenhouse gas standards. It does not change NOx or CO permit limits, Title V obligations, NAAQS-driven state requirements, or CEMS data availability under 40 CFR Part 75 — and scrutiny of criteria pollutants becomes more likely, not less, since EPA's own analysis projects the repeal will increase NOx, SO_2, and fine particulate emissions. The compliance work on your plant did not get smaller this year.

Three things that can still move before December 31

None of the above argues for waiting until spring. Three categories of work are available in what is left of the year, and only one needs an outage window.

1 **Unspent budget**

The most perishable asset on the plant. Dollars committed by year end do work. The same dollars uncommitted on January 1 are usually gone, and the condition they would have addressed carries forward into a year with less room in it.

2 **Work that never required a unit down**

A larger category than most scopes assume. HRSG casings can largely be coated with the units in service. Infrared thermography walk-downs find wet and missing insulation across a plant while it runs. Coating condition surveys, inlet and filter forensics, pipe support inspection, and catalyst baseline trending all happen online. This is the work that normally loses the outage-window competition — which is precisely why it should not be in that competition at all.

3 **The assessment itself**

A documented walk-down performed in November produces the findings spring scope is built from. Not a precursor to the decision, but the part of it that has to happen in 2026 regardless of when the wrenches turn.

And spring scope is being set at the same time

Long-lead material is the constraint people underestimate. Catalyst, HRSG tube material, specialty alloy, and electrical components are quoted against the same strained supply chain feeding the new-build boom. Work identified in February for an April outage frequently cannot be executed in that outage — it slips a full cycle, which means it slips a year. Contractor capacity behaves the same way: spring windows are concentrated, specialty crews are staffed against that peak, and scope confirmed late competes for whatever is left.

And the October emergency order is the warning underneath all of it: outage windows themselves are getting harder to hold, and work deferred under that pressure is exactly the work that returns as a forced outage at the worst possible price. The plants that perform well in 2027 are the ones acting now, in the budget year that is still open.

TWO WAYS TO USE THE TIME THAT'S LEFT

Book remaining 2026 work — online coatings, thermography and condition surveys, emissions system assessments — against this year's budget. Or **request a scope review**: a documented walk-down of heat recovery, emissions control, and plant integrity, consolidated into one report for spring planning.

Requests received by **December 15** can be scheduled before year end.

Request a scope review →

Or contact your Groome representative directly.

SOURCES DOE emergency order directing PJM generation, October 2026 · EIA preliminary RTO peak load data and Short-Term Energy Outlook, 2026 · PJM 2028/2029 Base Residual Auction results, July 14, 2026 · GE Vernova Q2 2026 results; Utility Dive · Doosan Enerbility order announcements, October 2025 – October 2026 · Ansaldo / Pacifico Energy order, POWER Magazine · U.S. EPA final rule repealing the 2024 Carbon Pollution Standards, September 14, 2026; Harvard EELP regulatory tracker.

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